Appointing External Courtesy Candidates via Courtesy Express

This guide will detail the steps to appoint Courtesy Appointment candidates via Courtesy Express in OMNI HR.

Each semester, the Office of Human Resources creates a non-advertised job opening for use by the entire University, known as the Courtesy Express. This process is used when the department is requesting a courtesy appointment. The courtesy appointment permits the individual to receive access to University privileges, such as FSU email accounts, computer system access, or building access. The Courtesy Express job opening will display for departments in the Recruiting > Search Job Openings list, but it is not advertised as a job for which applicants can apply. The department creates the applicant record, links the record to the current Courtesy Express pool, and prepares the job offer.

Key Information:
- Required Roles: **FSU_ERS_ADD_EXPRESS** and **FSU_SS_MANAGER**
- OMNI Recruiting Training Guides
- Courtesy Supplemental Documents
- Courtesy Job Codes

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Confirm the Candidate's FSU Affiliation

1. Prior to creating the appointment record, ask the hiring manager if the candidate is new to FSU or if they have access to their FSU email:
    a. If the candidate does not have FSU email access or is affiliated but does not know their FSUID and Empl ID/Student ID, proceed with adding them as a candidate new to FSU.
        i. Obtain a valid, non-FSU email address from the candidate.

2. Log into **myFSU** > click on the **HR icon**.

Create the Courtesy Express Appointment Record

3. From the **Department Administration** page or the Navigator > click **Recruiting** > **Add Express Appointment**.

NOTE: Department Representatives can also reach this page by going to the **Navigation Bar> Recruiting > Add Express Appointment**.
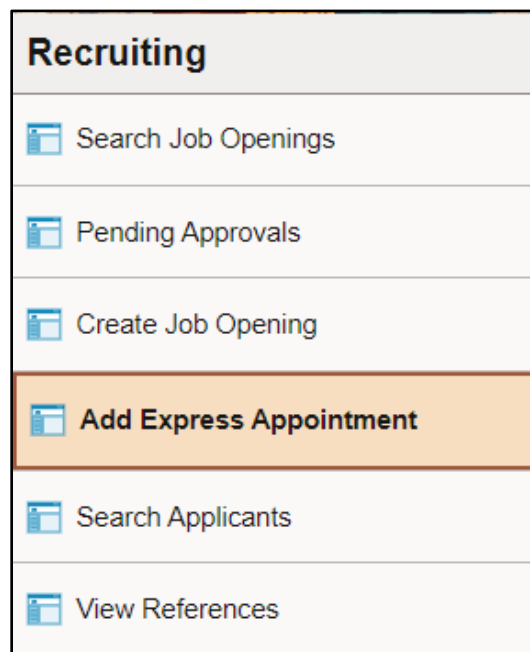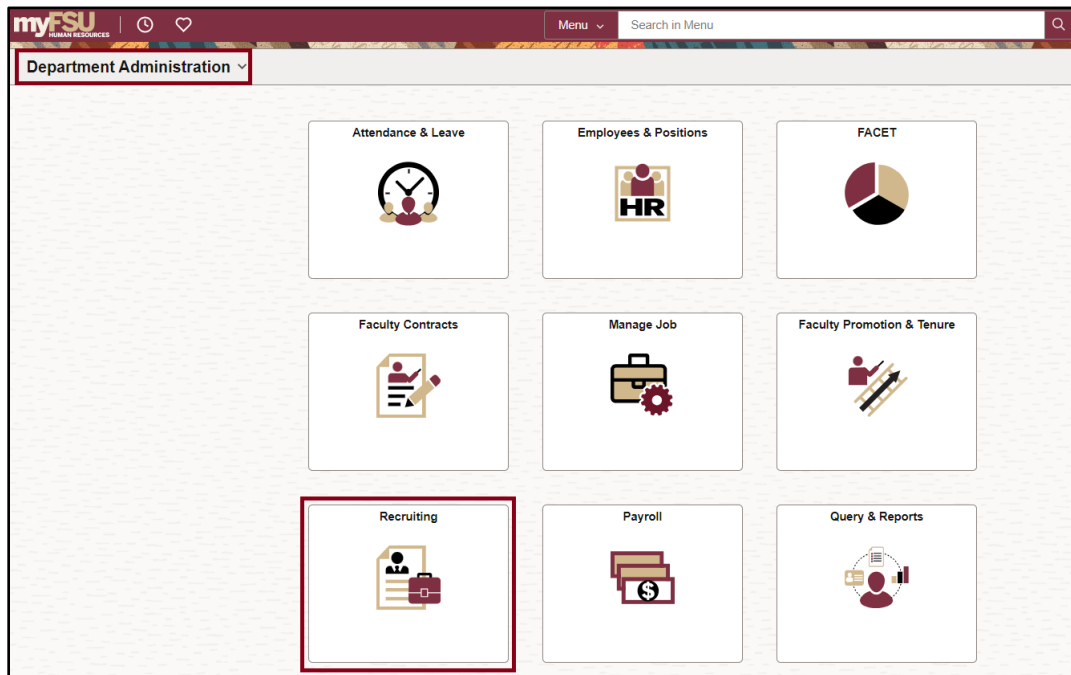
Adding *CANDIDATES NEW TO FSU*

4. On the **Add Express Appt** page:
    a. Allow **Applicant Type** to default to Express Appt.
    b. Enter the candidate's legal name in the **First Name** and **Last Name** fields.
    c. Click **Add Email Address** > choose email type > enter a **valid** email address > click **Save** or **Save and Create Another** to create additional express appointments.

Note: *The email provided is where the Onboarding invitation will be sent later in the process.* For email type, please select **Home** or **Other** – inserting an FSU email domain will result in an error and not allow you to save.

    d. Note the **Applicant ID** that generates and proceed to step 5.

Linking the Record to the Courtesy Express Pool

5. Navigate to **Recruiting** > **Search Applicants** > enter the applicant ID in the **Applicant ID** field > click **Search**.

6. Across from the candidate's name, use the **Actions** drop down menu to **select Link Applicant to Job**.

7. Enter or select the current semester's Courtesy Express job ID in the **Job Opening ID** field > click **Link.**

Preparing the Appointment

8. After the applicant's record has been successfully linked, click on the candidate's name to be redirected to the job opening(s) associated with the applicant's ID.

9. Under the appropriate Job Opening, click on **Other Actions**.

10. Click **Recruiting Actions** > **Prepare/View Job Offer**.

11. Begin on the **Offer Details** tab.
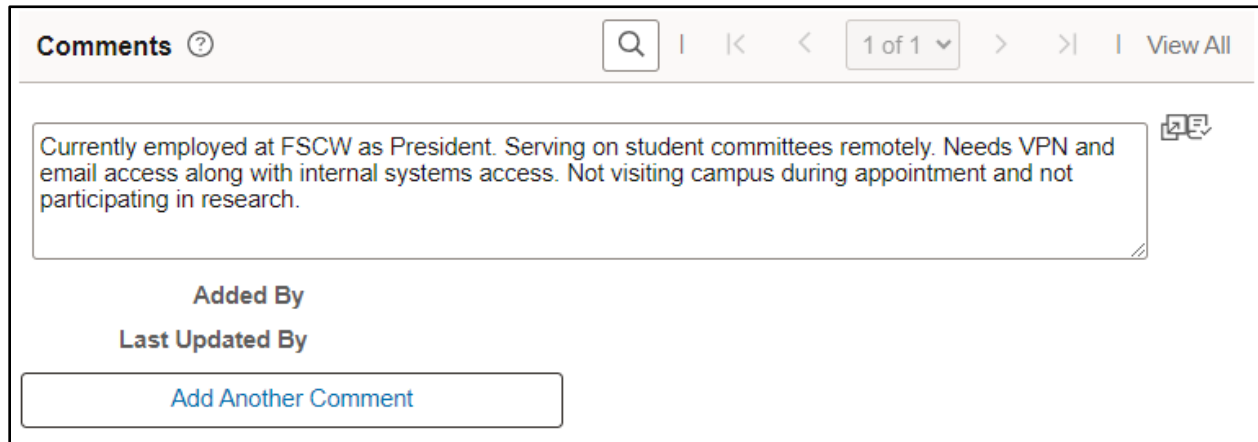
12. Navigate to the **Comments** section. Enter information pertaining to the candidate and/or appointment, such as employee ID (if a current employee), type of appointment (new, rehire, additional appointment.) <u>This includes stating that the candidate needs to receive access to University privileges, such as FSU email accounts, computer system access, or building access.</u> If the appointment is a **Post Doc**, please include financial support information including the source and amount of funding.

| Comments ⓘ | Q | I | |< | < | 1 of 1 ˅ | > | >| | I | View All |

Currently employed at FSCW as President. Serving on student committees remotely. Needs VPN and email access along with internal systems access. Not visiting campus during appointment and not participating in research.

Added By

Last Updated By

Add Another Comment

13. Navigate to the **FSU Offer – Additional Info** section.
   Enter the appropriate **Job Code** or click the look up button to select the appropriate Courtesy Job Code. To determine the appropriate Courtesy job code, review the information here.

   Note: The default code COUX is not a valid job code.

14. Enter the appropriate **Department** or use the lookup button to search and select the desired Department.

15. Enter the appropriate **Location Code** or use the lookup button to search and select the desired Location Code.

16. Enter the appropriate **Supervisor ID** or use the lookup icon to search for the desired Supervisor ID.

17. Enter the appropriate **Mail Code** or use the lookup icon to search for the desired Mail Code.

18. Enter the appropriate **Weekly Std Hours**. For *teaching Faculty appointments*, please enter the exact number of weekly hours.
   For *all other courtesy appointments*, please insert 0.01.

19. Click the **U.S. Citizen?** drop down menu. Select the appropriate answer from the list.

20. Click the **Empl Class** drop down menu. Select the appropriate classification - **Courtesy** should be used for standard Courtesy appointments. Please review the available Courtesy Empl Classes on the courtesy website.

NOTE: Appointments for Visiting Scholars should select the **Vstg Schlr** Empl Class. Please see the Appointing Unpaid Visiting Scholars via Courtesy Express.

21. The Pre-Mgr Approver field is optional. Use the lookup button to search and select a Pre-Mgr Approver, if desired. The Originator Telephone will automatically populate.

22. Enter the **Begin Date**.
    NOTE: Start dates should be 2-3 weeks out to allow times for approvals, onboarding completion, and background check completion (if applicable).

23. Attach any documents necessary for the Courtesy Appointment under Offer Attachments

NOTE: Offers needing RAMP approval are attached here. Please be sure to show the Visitor Information tab of the RAMP approval screenshot.

24. Click the **Background Check** tab.

Enter a **Description of Duties** for the appointment.
Confirm the Budget Manager and Budget Manager Email is correct.

Enter or look up a valid **Purchase Order #** or enter a valid **Foundation Fund #** to pay for the background check. The **Line #** will generate based on purchase order selected.

NOTE: The department will only be charged if a background check is required.

25. Answer each question on the **Background Check Questionnaire**; No or Yes as applicable. Confirm these answers with the hiring supervisor.

Once the questions are answered, the background level will generate at the bottom of the questionnaire.

The background check level will be reviewed by Human Resources Background Check staff.

Part 1. Outside Documents to replace/satisfy FSU Background Check:

1 Is this job/role located in the FSU Childcare Center?	⌄
2 Does this job/role require a specific background check to be performed for which approved external agencies complete screenings? (e.g., DRS positions, positions in the K-12 school system, etc.)	⌄
3 If the hiring department for this job/role has been granted approval by the Office of Human Resources to perform a specific background check for all employees, select the appropriate level. If not applicable, select "NO."	⌄
4 Will this person be working or volunteering with a University Sponsored Summer Camp held between May and September?	⌄

Part 2. Level 2 Background Check Required Duties:

1 Will this person be providing care, treatment, education, training, instruction, supervision, or recreation to vulnerable populations such as minors, the elderly, or those with disabilities?	⌄
2 Is the position classified as Vice President level or above by job code/administrative code?	⌄
3 Is the position with the FSU Public Safety or Panama City Campus Public Safety? If yes, submit a copy of the fingerprint report obtained by FSUPD; HR will conduct the Standard portion of the Criminal History Background Check	⌄
4 Is fingerprinting a requirement by granting agencies for grants and contracts?	⌄
5 Will this person be working or volunteering with regulated materials regardless of quantity [DHS Chemicals of Interest, DEA controlled substances, NRC Radioactive Material], or is the position located in a facility covered by a DOT Security Plan, or has unescorted access to said materials?	⌄

Part 3. Standard Background Check Required Duties:

1 Will this person perform fiscal duties to include budgeting, accounting, or having direct access to cash (except petty cash), checks, and/or credit/debit cards to include making and/or receiving payments?	⌄
2 Will this person possess system access that provides the ability to process payments, print or distribute checks, process corrections, or generate, update, or approve financial transactions that will result in the disbursement of University funds?	⌄
3 Will this person have control over University-wide operational processes through functional roles or system security access?	⌄
4 Will this person have access to sensitive, secure, and/or confidential personal information on individuals, such as students, faculty, staff, or alumni (e.g., social security numbers, dates of birth, etc.)?	⌄
5 Will this person possess access to surplus property inventory; or possess a grand master or building master key and/or cards for building access?	⌄

Part 4:

1 Will this candidate/position be required to drive a University-owned motor vehicle (including golf carts and other utility vehicles) as part of their regular duties? See University Policy OP-C-7-G8 for driver's license check requirements.	⌄
2 By selecting "Yes," I confirm that the above duties have been reviewed by the position supervisor and are accurate.	⌄

Submitting Appointment or Saving Draft

26. **Submit for Approval** or **Save as Draft**

   After you have submitted the appointment, a confirmation message pops up. Click the **OK** button.

27. Navigate to the **Approvals** tab to review the status of the job offer in the workflow.

To insert an additional approver, click the plus sign at the desired point, ensuring that the HR Final Approver is listed last.

Once the appointment is Final Approved, Human Resources will launch the Onboarding invitation to the candidate and the department will receive an email.

NOTE: To check the appointment status in workflow, navigate to the job opening through **Recruiting** > **Search Job Openings** > across from the candidate's name, click **Other Actions** > **Recruiting Actions** > **Prepare/View Job Offer** > **Approvals** tab.

Editing an Offer: The **edit offer** button is only live during the draft job offer stage. If you need to change a submitted appointment, it must be denied by the approver so the originator may **add revised offer**. At the add revised offer step, the offer details data will be retained and editable. However any attachments will not. Click **Save as Draft** to reattach any attachments. Once edits have been made and necessary documents are attached, click **Submit for Approval**.

Questions? For general questions about this procedure, email hr-courtesydocs@fsu.edu.