

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

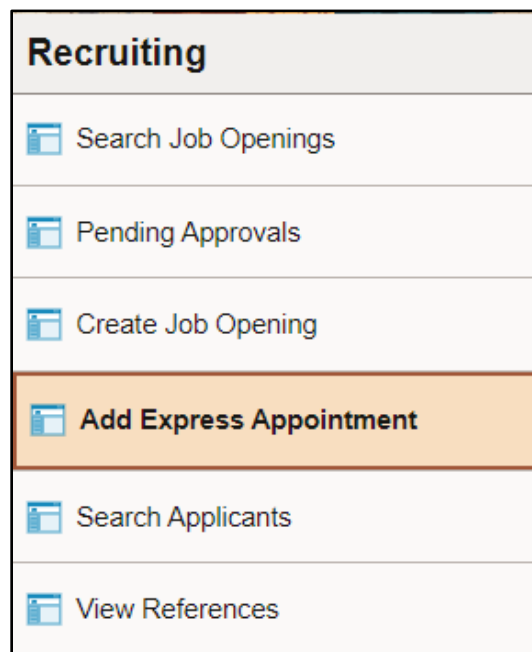
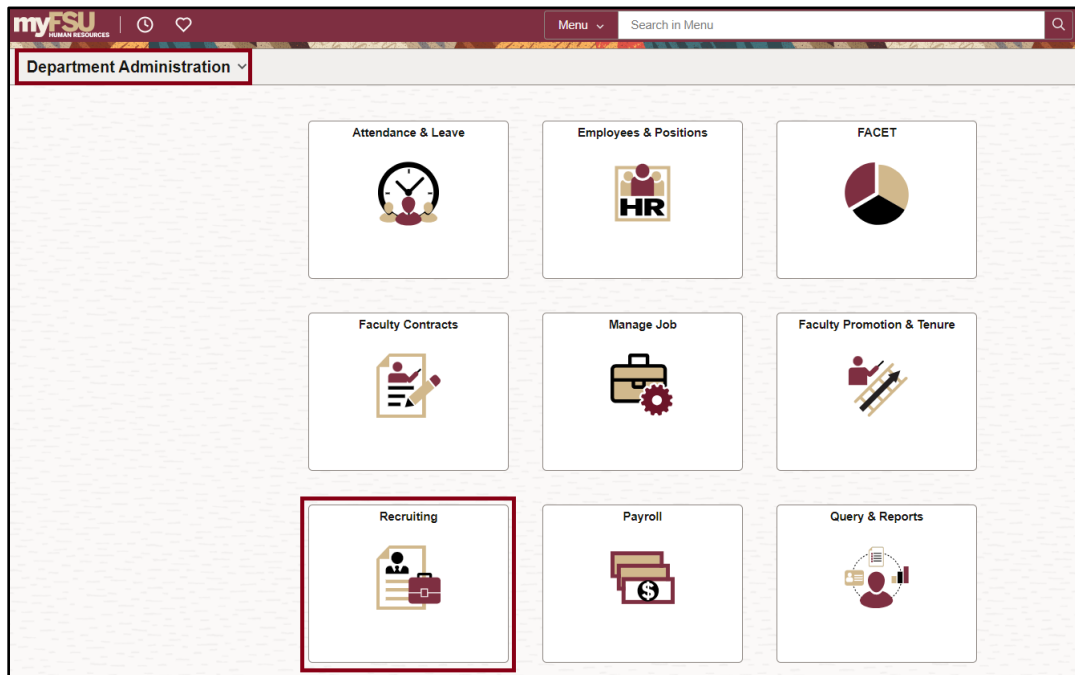
1. Prior to creating the appointment record, ask the hiring manager if the candidate is new to FSU or if they have access to their FSU email:
 - a. If the candidate does not have FSU email access or is affiliated but does not know their FSUID and Empl ID/Student ID, proceed with adding them as a candidate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

- 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.

The screenshot shows the 'Add Express Appt' form. At the top, there are buttons for 'Save' and 'Save and Create Another', with 'Save and Create Another' highlighted by a red box. The form is divided into several sections: 'Applicant' with fields for 'Applicant Type' (set to 'Express Appt') and 'Preferred Contact' (set to 'Not Specified'); 'Applicant Status' with fields for 'Status Code' (set to 'Active'), 'Status Reason', and 'Status Date' (set to '04/17/2024'); 'Name' with fields for 'Name Format' (set to 'English'), 'Name Prefix', 'First Name' (set to 'George'), 'Middle Name', 'Last Name' (set to 'Edgar'), and 'Name Suffix'; 'Email Addresses' with a table for adding email addresses, where the first entry is highlighted by a red box; and 'Phone Numbers' with a message 'No Phone Numbers have been added for this applicant.' and an 'Add Phone Number' button. A note on the right side of the form states: 'NOTE: When creating an appointment for an active Employee or Student, choose Applicant Type "Employee". You may add a Home or Other email as a secondary contact, but the FSU Official Email will default to primary and the onboarding will be launched there (This is set by the university). Home and Other email types cannot contain a "@fsu" domain.'

Primary	*Email Type	Email Address
<input checked="" type="checkbox"/>	Home	george.edgar.1887@gmail.com

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

The screenshot shows the 'Manage Applicant' page. At the top, there are buttons for 'Save' and 'Save and Create Another', with 'Save and Create Another' highlighted by a red box. The page displays the applicant's name as 'George Edgar' and the 'Applicant ID' as '788694', which is highlighted by a red box. Below the name, there are tabs for 'Personal Information' and 'Applications', with 'Personal Information' selected.

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**.

The screenshot shows the 'Recruiting' interface. On the left sidebar, 'Search Applicants' is highlighted. The main area shows search criteria fields. The 'Applicant ID' field is filled with '788694'. The 'Search' button is highlighted with a red box.

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

The screenshot shows a table of search results. The first row is for George Edgar. The 'Actions' dropdown menu is open, showing the option 'Link Applicant to Job'.

Select	Applicant↑	Applicant ID	Type	Status	Phone	Email Address	Date Applied↓	Jobs Applied	
<input type="checkbox"/>	George Edgar	788694	Express Appt	010 Active		george.edgar.1887@gmail.com	04/17/2024	0	<div>Actions Link Applicant to Job Send Correspondence</div>

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

Link Applicant to Job Opening

Applicants to be Linked

Applicant	Name	Status	Email Address	
<input type="text" value="788694"/>	George Edgar	010 Active	george.edgar.1887@gmail.com	

Add Applicant

Job Openings

Job Opening ID	Posting Title	Job Posted	Questionnaire	
<input type="text" value="56448"/>	Courtesy Express Spring 2024	No	No	

Add Job Opening

Disposition Information

*Disposition

Linked

Reason

Date

04/17/2024

Link

Cancel

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.

Recruiting

Recruiting Home

Quick Search

Keyword Search

Advanced Search

> Search Criteria

1 Result(s) Found

Search Results

Select

Applicant

Applicant ID

Type

Status

☐

George Edgar

788694

Express Appt

010 Active

Select All

Deselect All

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

Manage Applicant

[Save](#) | [Return](#) | [Recruiting Home](#) | [Search Applicants](#) | [Create Applicant](#) | [Add Application](#) [Personalize](#)

Name George Edgar
Applicant ID 788694
Applicant Type Express Appt
Status 010 Active

Preferred Contact Not Specified
Phone
Email george.edgar.1887@gmail.com
Address 600 W College St Tallahassee, FL 32306 Leon

Applicant Activity | Notes | Applicant Data | Interested Parties

[Current Status](#) | [Interview Evaluation](#) | [Expenses](#) | [History](#)

Applicant Activity ⓘ

Select	Job Opening	Job Opening ID	Disposition	Application	Resume	Route	Print	
<input type="checkbox"/>	Courtesy Express Spring 2024	56448	Linked					Other Actions

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

Manage Applicant

[Save](#) | [Return](#) | [Recruiting Home](#) | [Search Applicants](#) | [Create Applicant](#) | [Add Application](#) [Personalize](#) [Print](#) | [History](#)

Name George Edgar
Applicant ID 788694
Applicant Type Express Appt
Status 010 Active

Preferred Contact Not Specified
Phone
Email george.edgar.1887@gmail.com
Address 600 W College St Tallahassee, FL 32306 Leon

Applicant Activity | Notes | Applicant Data | Interested Parties

[Current Status](#) | [Interview Evaluation](#) | [Expenses](#) | [History](#)

Applicant Activity ⓘ

Select	Job Opening	Job Opening ID	Disposition	Application	Resume	Route	Print	
<input type="checkbox"/>	Courtesy Express Spring 2024	56448	Linked					<div>Recruiting Actions > Applicant Actions > Prepare / View Job Offer View / Edit Application Details</div>

[Select All](#) [Deselect All](#) [Group Actions](#)

11. Begin on the **Offer Details** tab.

Offer Details | Background Check

Job Opening 56448 **Courtesy Express Spring 2024**

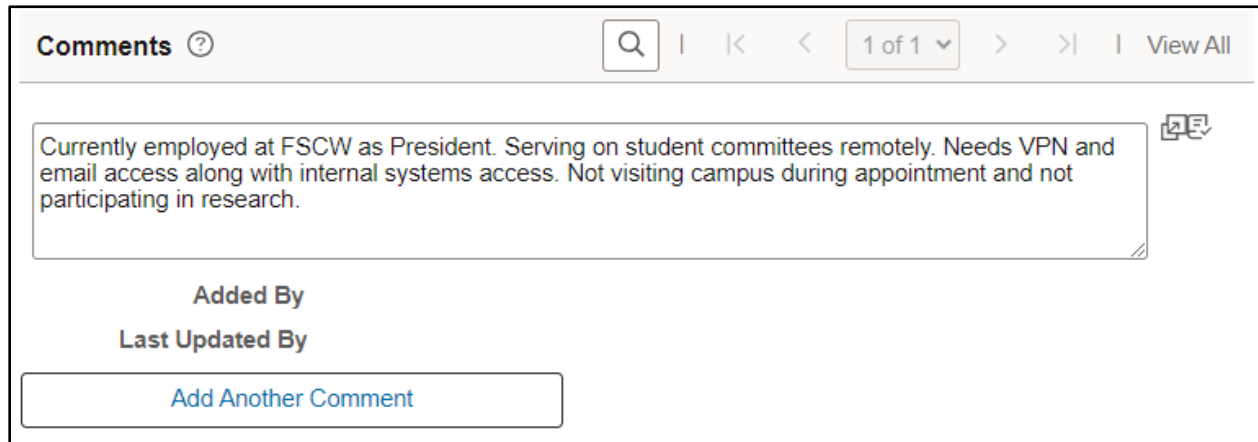
Position Number

Recruiter

Status 006 Pending Approval

Created By

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.) This includes stating that the candidate needs to receive access to University privileges, such as FSU email accounts, computer system access, or building access. If the appointment is a **Post Doc**, please include financial support information including the source and amount of funding.



The screenshot shows a web interface for the 'Comments' section. At the top, there is a header bar with the title 'Comments' and a help icon. To the right of the title are navigation controls: a search icon, a list icon, a back icon, a page indicator '1 of 1' with a dropdown arrow, a forward icon, a list icon, and a 'View All' link. Below the header is a large text area containing the comment: '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.' To the right of the text area is a small icon of a document with a plus sign. Below the text area are two labels: 'Added By' and 'Last Updated By'. At the bottom of the section is a button labeled '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).

FSU Offer - Additional Info

Employee Id

*Job Code: H9009 Eminent Scholar

*Location Code: 4004A0321 PSYCHOLOGY DEPARTMENT BUA0321

*Department: 089000 Psychology

*Supervisor ID: 000000179 Karen Berkley

*Mail Code: 1270

*Weekly Std Hours: 0.01

*U.S. Citizen?: Yes

*Empl Class: **Courtesy**
Emeritus
Joint Coll
MCF
MSC
PCF
Phone
Post Doc
RCF
Vstg Schl

Pre-Mgr Approver (Optional):

*Originator Telephone: 850/644-9894

Begin Date: 05/06/2024

23. Click the **Background Check** tab.

Offer Details ⓘ

Offer Details

Background Check

Budget Manager

Budget Manager Email

Background Check Funding (Required)

Purchase Order #

Line #

OR

Foundation Fund #

Approval Submission

Description of Duties/Comments

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.

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.

24. 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? <div></div>
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.) <div></div>
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." <div></div>
4	Will this person be working or volunteering with a University Sponsored Summer Camp held between May and September? <div></div>
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? <div></div>
2	Is the position classified as Vice President level or above by job code/administrative code? <div></div>
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 <div></div>
4	Is fingerprinting a requirement by granting agencies for grants and contracts? <div></div>
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? <div></div>
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? <div></div>
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? <div></div>
3	Will this person have control over University-wide operational processes through functional roles or system security access? <div></div>
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.)? <div></div>
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? <div></div>
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. <div></div>
2	By selecting "Yes," I confirm that the above duties have been reviewed by the position supervisor and are accurate. <div></div>

Submitting Appointment or Saving Draft

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

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

Offer Details

Background Check

Budget Manager

Budget Manager Email

Background Check Funding (Required)

Purchase Order #

Q

Line #

OR

Foundation Fund #

Approval Submission

Save as Draft

Submit for Approval

Add Revised Offer

Delete Offer

Edit Offer

Description of Duties/Comments

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.

You have successfully submitted George Edgar's job offer. (0,0)

OK

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

Offer Details ?

Offer Details Background Check **Approvals**

FSU Job Offer Workflow

▼ **Job Offer: Pending**

FSU Job Offer Workflow

Pending
Reginald Renegade
FSU Job Opening Dept. Mgr.

➕

Not Routed
Multiple Approvers
HR Background Check Approver

➕

Not Routed
Multiple Approvers
HR Final Approver-Courtesy

➕

Submit

Comments

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.