Taleo Talent Management System Training

Educational Support Professionals

Remember – if you have any questions or need assistance, send an e-mail to Taleohelp@temple.edu or call 215-204-4008 (1-4008).

3/31/2020 taleo@temple.edu
Table of Contents – Educational Support Professional

Navigation........................................................................................................... 3
My Set-up............................................................................................................. 6
Quick Filters......................................................................................................... 7

Requisition ......................................................................................................... 9
Creating a Requisition......................................................................................... 9
Requisition Structure........................................................................................ 13
Job Information.................................................................................................... 16
Job Description................................................................................................... 18
Questionnaire....................................................................................................... 18
Routing for Approval........................................................................................ 21
Approving a Requisition....................................................................................... 23

Stepping Through the Process........................................................................... 25
Posting a Requisition (Optional)......................................................................... 25
Matching Candidates........................................................................................... 28
Viewing Candidates............................................................................................ 30
Changing Step/Status of Candidates................................................................ 31
Creating an Interview.......................................................................................... 35

Extending an Offer and Hiring an ESP............................................................... 38
Creating an E-offer............................................................................................ 38
Route for Approval............................................................................................. 42
Extend the Offer.................................................................................................. 43
Hiring a Candidate.............................................................................................. 48
Onboarding.......................................................................................................... 50
Candidate Facing Information............................................................................. 53
Modifying Duties after Hire............................................................................... 58
Addendum: Rescinding and Resending Offers.................................................. 61
Navigation

Taleo is accessed from the TUPortal. Click on Taleo Talent Management System.

The recruiting Center has a main dashboard screen with a series of Tabs, Channels, Filters and a Search area to make it easy for you to quickly perform a wide range of essential recruiting tasks. To access the Recruiting Center you will need to click on the Recruiting link at the top of the Welcome Center page. You can click on the Recruiting link in the navigation pane on the left side of the page as well.

The **Recruiting Center** is set up to provide quick access to information on requisitions, candidates, offers and other activated functions. It is also possible to set up preferences and personal information in the My Setup area.

The Recruiting Center Stage page contains links to virtually all of your vital information and tasks. From candidates to requisitions, this page provides time-saving options that will guide you to where you need to be in the system.

It is simple to navigate through the Recruiting Center.

1. **Channels:** Navigate from Center Stage using sections called Channels, which display status-oriented data about your activities. From the links on the Channels, you can access information on your requisitions, candidates, job offers and other tasks. Each Channel contains a list of elements and the number of items associated with each element.

2. **Main Menu:** Access the main menu items to work with your requisitions, candidates, offers and tasks quickly. Clicking the Channel title of the same name will get the same results.
3. **Resources Link:** Click the Resource link to access options, such as My Setup.

4. **Search:** Use the Search area to find candidates and requisitions quickly. Use the toggle to switch from candidate to requisition search.

5. **Support:** Send an e-mail if you have a question.
Navigation Tips:

1. When you click a link within a Channel, you will be presented with information that you own in the system. However, you can change your dashboard filter to view information on which you collaborate or information within your coverage area. Coverage areas are Temple’s 3 or 5 digit department orgs.

![Quick Filters]

2. It is recommended to use the buttons, links, and other navigation tools to move around the Recruiting Center instead of using the browser's Back/Next buttons. The Back/Next buttons do not always yield consistent results.
My Set-up

You can use the Resources menu to access the My Setup, or user preferences, area of the system. This allows you to setup your own User Preferences for different features of the system. One important feature which will assist with Requisition creation and Approvals is the Frequent Collaborators and Frequent Approvers. Setting up a list of frequent collaborators and frequent approvers will allow you to insert these individuals into a requisition or into an approval list with the click of a button.

Process Steps

1. Once in My Setup, you will see the Frequent Collaborators and Frequent Approvers tabs. Click on the Frequent Collaborator Tab.

2. Once in the Frequent Collaborators tab, click on the button to open the User selection window.

3. Once the User selection window is open, use the Quick Filters in the left pane to search for a frequent collaborator by Name, Email Address, Title or Keyword. Click the Refresh button to populate your results.

4. Once you have found the right User, add them to the list of Selected Collaborators by clicking the button to the right of the User in the list.

5. When all of the Users have been added to your list of Selected Collaborators, click the button.

6. You can repeat these steps for the Frequent Approvers as well.
Quick Filters

Quick filters can help you narrow results for data you are seeking. You can view quick filters when viewing any of the tabs in the core navigation. Quick filters are always found on the left hand side. The quick filters available in the pane will be relevant to the area of the Recruiting Center you have accessed. Below is a screen shot of the Quick Filters in the Requisition tab.

Example: Requisition List Quick Filters

In the Requisition List view of the Recruiting Center you have many options for filtering the list of Requisitions to view a select group of requisitions. Each option can be used independently or in connection with other filters to narrow the list even further.
Option 1: Show requisitions for – This filter allows you to show only requisitions you own, or collaborate on or show all requisitions in your coverage area (see Navigation Tips, page 4).

Option 2: Requisition Status – This filter allows you to filter the list by a specific or multiple requisition Statuses. For example, if you wanted to see only active requisitions in the list you would select Open Status requisitions.

Option 3: SmartOrg (Primary Location, Job Field, Organization, Posting Title) – This filter allows you to condense the list of Requisitions to only requisitions for a certain location or organization.
   Primary location = Country-State-City-Campus-Building
   Job Field = Type of employee (adjunct, grad ass’t, post doc, staff, student) and category of job
   Organization = 5 digit home org

Option 4: – The button will open the Advanced Filter window which will allow you to search by other requisition data points, such as, HR Business Partner/Department Recruiter, Hiring Manager, Requisition number, Job Codes, etc.
Create a Requisition

Both Hiring Managers and Department Recruiters have the ability to create a requisition for Educational Support Professionals (ESPs). To start the Requisition, click on the Create Requisition button in the Requisitions Channel.

The first step is to select a requisition template. The template is selected by entering the PCN from Banner of the position you wish to fill.

A valid PCN is required before you start the requisition. Please check with your Business Manager if you have any questions about the title, e-class, or grade associated with the PCN.

The format of the PCN is:

Educational Support Professional “B” followed by the 5 digit org

Step 1
You can search for PCN’s by using a Quick Filter. For example, if you enter “B” then hit refresh, the following displays.

Click the Select button next to the PCN desired. Your Requisition Template will then populate with your PCN and the template title.

TRAINING TIP – You may directly enter data into template fields and the field will begin to auto-complete. The data takes a few seconds to populate. Ensure you are selecting your PCN from the list provided. If your data is not underlined, then you do not have a valid entry.

Next enter the Hiring Manager. This can be your own name if you are performing that role. Again, you may type in the last name slowly and wait for the field to populate, or you may use the Quick Filter search. The name must appear underlined to be valid.

Step 2

Next, you will enter the organization. Start to type your 5 digit Home Org and suggested values will populate. Select the org desired.
The next step is to enter the location. Enter the campus or building and suggested results will populate.

Example:

Taleo Tip: If your Educational Support Professional is working from home or working remotely, you can select Location INSIDE of PA or Location Outside of PA. If you are hiring multiple Educational Support Professionals to one position, the location must apply to all Educational Support Professionals.
The Job Field will populate from your PCN. **Do not change what is entered in this field.**

Now click Create.
Requisition Structure

There are different sections in the Requisition which need to be reviewed and completed. All required fields are marked with a red asterisk ( * ).

TRAINING TIPS –

1 - Change the Show fields required to: Request Approval. This will display all of the fields required for approval as opposed to just the fields required to save the requisition. This does not send the requisition for approval.

2 – To help determine if there are any remaining fields to complete, use the Diagnostic Tool. The right panel will expand automatically when you click on the Diagnostic Tool and will display any fields that need to be updated in order to Save or Request Approval.

Requisition Structure

You will need to enter information in this section such as:

- Posting Title
- Number of Openings
- School/College for Appointment Letter
- Banner Home Org
- Department Description for Offer Letter (department name to populate in the offer letter)
- Banner Check Distribution
- Justification for the position
- Name and TUid of Supervisor
**Number of Openings**

Specify the number of openings you would like for this requisition. The default number is 1 opening, however, you can type in the number you need. If necessary, you can add some additional spots if the number of ESPs you are projecting to hire may change. Once you have filled the last open position, the requisition will close.

![Number of Openings](Image)

**Supervisor**

The Supervisor field is very important as this field will be imported into Banner and feed other systems such as the PDP. You can start to type a name or a TUid and the field will start to populate. Make sure the entry is underlined so you know it is valid.

**NOTE:** If a supervisor’s name does not appear, contact taleohelp@temple.edu

![Supervisor - TUid for Org Chart](Image)

As an alternative, you can hit the Quick Filter button ( ). Type in a first name or last name, click the Refresh ( ) button and you will get an appropriate selection list.

**Owners**

You will be entering the name of the Department Recruiter for your department. This is the person who will be **creating** and **extending** the offer and hiring the employee in the system. If you have the correct access, this could be yourself. Otherwise, this should be someone in your department with Department Recruiter access to Taleo.
You can start typing in the name of the Department Recruiter. Click on the name from the options given by Taleo.

**Owners**

* Bus Partner/Dept Recruiter
dorie
Ryan, Dorie

**Adding Collaborators**

You may choose to add Collaborators to your requisition. Select the individual names by clicking Modify to bring up a list of Taleo users. You can also add your own Add Frequent Collaborators if you have set up your personalized list.

If one of your Frequent Collaborators does not need to be on this requisition, you can use the Modify button to adjust the list for this requisition only.

**Process**

This section displays the system workflow being used. There is also a free form comment box where you may enter Additional Information if desired. This information is only for internal use – it is not viewed by candidates.

**Important Note: Depending on your access to the system, the “Additional Information” section may be located within the Requisition Structure.**
Job Information

This section contains data such as shift, targeted start date, and the Compliance questions.

### Compliance Questions

Compliance Questions - Answers to these questions trigger processes in the background. These are required for all requisitions. “Not Specified” indicates an answer has not been given. You must choose a “Yes” or “No” answer.

**TRAINING TIP** – If all of the answers are no, you can save time by navigating to the first question and then typing in N tab, N then tab, etc. This can also be done using the Y key for “yes” answers.

The Compensation section displays the basis of pay for the ESPs. All ESP requisitions should reflect a pay basis of **Monthly** at the requisition level. **DO NOT** make any changes to this section.
The FLSA section pulls into the requisition from the PCN. This can also be left as is.

<table>
<thead>
<tr>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Basis</td>
</tr>
<tr>
<td>Monthly</td>
</tr>
<tr>
<td>Annualization Factor: 12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FLSA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overtime Status</td>
</tr>
<tr>
<td>Exempt</td>
</tr>
</tbody>
</table>
Job Description

You need to complete the Internal Job Description field. You must copy and paste using the HTML editor (see 1 below). If you selected a generic template to create your requisition, you will need to update the job description and Qualifications fields.

4. Job Description

[Image of HTML editor interface]

Questionnaire

This section displays questions to be answered by students who are applying to requisitions. The Eligibility Questions will be utilized on all requisitions. An applicant’s answers will have a green check mark when completed.

5. Questionnaire

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answer</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Are you under 18 years of age?</td>
<td>Yes</td>
<td>To Be Verified</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>The Candidate Passes</td>
</tr>
<tr>
<td>2. Do you have relatives employed with Temple University?</td>
<td>Yes</td>
<td>To Be Verified</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>The Candidate Passes</td>
</tr>
<tr>
<td>3. Do you have the legal right to work in the United States</td>
<td>Yes</td>
<td>The Candidate Passes</td>
</tr>
</tbody>
</table>
Additional questions may also be included. Click **Add** under the Job Related Questions section. Use the Quick Filters on the left to find a question you would to add, then click **Select** to add the question to your list.

Once the questions are added, choose **Required** for the applicable answer from the drop-down menu on the right-hand side of the page. This will indicate to the system which answer is needed.
At this point, all fields should be filled in and the requisition should be ready for approval. At the top of your page, you will have three options.

- **Save**: can be used throughout creating of the requisition to ensure your work is being saved as your complete the fields.
- **Save and Close**: saves your current work and closes out of editing mode. This can be chosen if you need to stop working on your requisition and return later to continue editing.
- **Cancel**: exits out of the requisition without saving changes.

**TRAINING TIP** – Before sending your requisition for approval, open the Diagnostics Tool on the right-hand side to ensure all fields have been completed. If any field requires information, it will be listed in the Diagnostics Tool. If the requisition is ready for approval, the Diagnostics Tool will read “File ready for approval.”

**TRAINING TIP** – If you save your requisition before it is complete and will need to return to it, you will need to click the Edit button to make changes. Once a requisition is open and approved, the Edit button will no longer be available.
TRAINING TIP – As you move through the requisition, the status box on the left will update and display the status of the requisition.

Routing for Approval

If you are a Department Recruiter and have the appropriate authority to approve a requisition, then you can selfapprove a requisition by selecting the Request Approval for the More Actions drop-down menu. If you are a Hiring Manager, the system will default to your Department Recruiter as the first approver. If the position is grant funded, then you must add your Research Accounting contact as an approver.
To add department approvers, click on Add Approvers on the bottom left. You are able to search for approvers in the new window to add to your list. When you are ready to request approval, add a comment in the comment box (required) and click Done. An email will be sent to the Dept Recruiter to approve the requisition, starting the approval chain.

**NOTE:** If you are the Department Recruiter on the requisition you have created, your name will appear first in the Request Approval box. Your approval will be given automatically since you created the requisition.
Approving a Requisition

After a Hiring Manager adds approvers, the Department Recruiter will receive an email requesting approval.

Through the Taleo dashboard, locate the “Tasks” channel on the right hand side of the screen and click on “Approve Requisition”. Click on the title to open the requisition. This will allow you to review the requisition if needed.

Click on the More Actions tab at the top. Click on “Decide on Approval” to bring up the approval box.

Choose “Approve” from the drop down menu under, input a comment, and click “Done”. An email will be sent to the next approver, if there is one. The status of the requisition will remain as “Pending: To be Approved” until the last person in the list has given their approval.
If you are the last, or only, person in the approval chain, the status of the requisition will update to “Open: Approved” when the approval is given.
Posting a Requisition (Optional)

**Note: this is an optional step for ESPs If you do not wish to post the job, this can be skipped and candidates can be matched to the requisition by the Hiring Manager or Department Recruiter.**

Navigate to your approved requisition and open it. From the gray tabs across the top of the page, choose Posting and Sourcing.
Once in Posting and Sourcing, locate Career Services at the top of the page. Click on the “Modify” button. A pop-up box titled Posting Requisitions will appear with posting options.

In this pop-up box, you will choose which Career Sections on which you want to post the requisition on Temple’s website. You can choose when to post the req (Start Date) and when it should be taken down (End Date). Use the drop down menus to pick from a range of timeframes or use the calendar icon next to each drop down to pick a specific date.

ESP positions can be posted to sites for **Internal** and **External** applicants. Ensure that the boxes under “Posting Status” are marked for each location you wish. When you are finished, click “Done” to post the requisition. The window will close out. A list will be shown in the Posting and Sourcing tab to indicate the timeframes you chose for the job posting.

If you wish to only post the job internally, you can uncheck the external options.

If you want to make any changes to the posting dates, you are able to go to the Posting and Sourcing tab in your requisition at any time. The Modify button will be available to you. You can extend or shorten an end date at any time.
Unposting a Position

To unpost a position and remove it from the job site, you can use the Modify button to open the Posting Requisitions window. Uncheck the box on the far right side of the window. Click “Done” to unpost the job.

After a job has been unposted, you are able to use the Modify button to repost the job if needed. Follow the directions as indicated above to post a job to the career site.
Matching Candidates

Navigate to your approved requisition from your dashboard. On the top, right-hand side of the screen, you will see a search box.

In this search box, enter the name of the candidate or TUid you are searching for. Click the button with the magnifying glass to the right, or hit Enter to search for that person.

The name you searched will return results. If there is more than one profile for your candidate, all names will appear. First, check off the box that appears on the left-hand side of the candidate list for the candidate you wish to match to your requisition. Then, click the icon of the green figure with a chain link at the top of the list.

TRAINING TIP - Internal candidates will be shown with a purple house icon and a TUid.
After clicking the icon, a pop-up box will appear with a list of your requisitions. Click “Select” next to the requisition to which you are matching the candidate. The name of the requisition will appear under “Selected Requisitions”. Click Done to match candidate.

After clicking Done, a pop-up box will ask if you want to send an email to the candidate. Choose “No”, since the e-mail will invite the candidate to apply for the job and you have already matched them to it.

Navigate back to your requisition. It will now show a new candidate has been added.
Viewing Candidates

After candidates have either been matched or applied to your requisition, you will be able to view them through in Taleo.

From the dashboard, you can navigate to candidates in two ways:

1. **View Requisitions:** Navigate from Center Stage to view a full list of your requisitions. On the left-hand side of the page, the number of candidates is shown under the Candidate Count icon. Click on the blue number to bring up the list of candidates for this job. You can click on each candidate’s name to review their profile and job submission.

2. **View Candidates:** Navigate from Center Stage to view lists of candidates on various requisitions. A list of active requisitions will show on the screen. You can toggle the gray triangle on the left-hand side to show a list of candidates for each requisition. To the right-hand side of the list, you are able to view how this person applied (i.e. Online or Matched to Job).

3.
Changing Step/Status of Candidates

Navigate to your requisition and click on the blue number of candidates to view the candidate list. All new candidates should appear in the Step/Status of "Manager Review: Manager to Review". You are able to move candidates through the process in groups or one at a time.

Moving Candidates in Groups

For some jobs, the Hiring Manager or Department Recruiter may wish to move multiple candidates at one time. To do so, ensure you are viewing the candidate list for your requisition.

Check off all candidates to be moved to the next Step/Status. All candidates chosen will be moved to the same point in the process. Candidates must all start at the same step/status (i.e. all candidates below are shown in “Manager Review: Manager to Review”).
Click on the More Actions tab to bring up a list of options. Choose the “Change Step/Status” option to bring up a pop-up box. The box will show the current Step/Status at the top and the next move in the process.
TRAINING TIP - In the Change Step/Status box, you have two options:

1. **Save and Continue**: By choosing this option, the box will remain open and automatically bring the candidate into the next step or status. Only use this option if you are moving candidates through several steps/statuses at one time.

2. **Save and Close**: By choosing this option, you are moving the candidate one Step/Status at a time. It will save your choice and close the window, bringing you back to the candidate list and showing the updated Step/Status.

The candidates can be moved along the process as far as you wish to take them at that time. You can continue to update the Step/Status up to the Offer stage. Once a candidate is in the Step/Status of “Offer: Offer to be Made”, you will need to stop to create the offer. The Department Recruiter will receive an email indicating that the candidate is ready to receive an offer. Their updated Step/Status can be viewed in the candidate list.
Moving Candidates One at a Time

Navigate to the candidate profile either from the requisition or the View Candidates tab on your dashboard.

While in a candidate profile, locate the “More Actions” tab at the top of the page. Click on the arrow in the tab for a drop-down list. Choose the “Change Step/Status” option.

A pop-up box will appear, giving options of steps to move the candidate through. The initial Step/Status will show the top of the box. The next Step/Status to move to will show below. You can review each applicant and change the status accordingly.

Continue moving candidates through the Step/Status box to advance them through the process. You can move an ESP until the “Offer: Offer to be Made” step/status. Here, the Department Recruiter will need to go into the Offer grid to create an offer.

If you wish to interview a candidate, you will need to stop changing the step/status of the candidate at “Manager Review: Proceed to Interview” by choosing “Save and Close”.

TRAINING TIP - If you status an applicant by mistake, you are able to move back a step. From the “More Actions” tab, choose “Revert” from the drop-down menu. A pop-up box will appear to move the candidate back a step. Comments are required to be included when the Revert option is chosen.
Creating an Interview (Optional within Taleo)

Ensure all candidates you wish to bring in for an interview have the Step: Status of **Interviews: Interview Scheduled**. From Candidate’s list, check off the candidate you wish to schedule an interview with.

Go to **More Actions** and choose **Schedule an Interview**

Fill in appropriate fields in the new window. Most of these will be auto-populated with information. You can make edits to any field. Click **Next** when done.

- Subject
- Organizer (this should be left as your own name)
- Location
- Start and End date and times
- Default Time Zone (do not change, should reflect Eastern Time)
- Reminder
NOTE: Check off the box for sending an invite to the candidate if you want them to receive an email with this information as well. Uncheck box if you do not want candidate to receive an email from Taleo.

Next, choose the Interview Attendees to send an invitation to. The Quick Filters on the left-hand side of the window allow you to jump directly to the name or email address of the person you are searching for. Click Select on the right-hand side of the window to add attendees to your list.

Click Next when all attendees have been added.

In the next window, the Message Template field will indicate the Interview Notification template as chosen. This can be left as is. You may also include an additional message in the invitation email, to appear at the bottom of the email. Otherwise, the email will contain only the information given for the Interview Properties window.
You are also able to send a link to the candidate file or the requisition file to attendees, excluding the candidate. Click **Done** to send the interview invitation.
Creating an E-offer

If not already in the requisition, navigate to your requisition and click on the number of candidates. Then, click on the name of the candidate to whom you are offering the position. Ensure the candidate is in the Step/Status of Offer/Offer to be Made.

In the candidate’s profile, go to More Actions and select Create Offer.

This will open up the Offer grid.
**Offer Grid**

Enter the following information which will appear on the E-offer appointment letter:

**NOTE:** you may enter a date or click on the calendar function for all date fields

- **Pay Start Date**
  - The pay start date for an ESP should always be the first day of the first month they are paid
  - Example: September 1st for Fall semester; January 1st for Spring semester

- **Pay End Date**
  - The pay end date for an ESP should always be the last day of the last month they are paid
  - Example: December 31st for Fall semester; May 31st for Spring semester

- **Teaching Begin Date**
  - The first day the ESP begins work for that semester

- **Teaching End Date**
  - The last day the ESP finishes work for that semester

- **Offer Expiration Date**
  - Date by which you want them to respond to the offer

---

**TRAINING TIP** – By default, the box labeled Tentative is checked. This means that the job start date is tentative. For ESPs, uncheck this box since the start date is not tentative as it might be for staff positions.
The next section relates to pay and title.

Enter the rate of pay and pay basis. Always choose “Monthly” for ESPs.

Below that field, there is a Credit Hours field. For ESPs, this field can be left to read 0.

Next, click on the selector icon to select the correct title. Scroll down to find the appropriate title.
In the next field, choose the Hours Per Week from the drop down menu provided.

Lastly, complete the Details grid with the semester contract total amount and the number of pays.

If needed, a FOP index is available. This is to be used if you do not want the default FOP from Banner Position Control to default into the job.

**NOTE:** If you need to look up an INDEX, please sign into TU Portal and go to Banner Tab, Finance Channel.
- Operating Funds (100000): the corresponding *org* is equal to the index
- Non-operating Funds (all except 100000): the *fund number* is equal to the index

Hit Save and Close when you are done. If you are missing any fields, an error message will appear. After you save the offer, an edit button will appear so that you may make revisions if necessary.

If needed, you can route the offer for Approval to others in the department. Recruiters with proper authority may extend the offer without needing additional approval.
Route for Approval

Go to More Actions and click on Request Approval.

To add approvers, click on Add Approvers on the bottom left. You are able to search for approvers in the new window to add to your list. When you are ready to request approval, add a comment in the comment box (required) and click Done. An email will be sent to the Approver alerting them that action is needed.
Extend the Offer

Go to More Actions and select Extend Offer.

Recruiters will see the following pop-up warning box. If you have proper authority, you may click “Yes” to self-approve the offer. Otherwise you must route for approval.

An Extend Offer dialogue box will appear. Select Extend in Writing and click Done.

VERY IMPORTANT – Select E-offer in the Send Offer Letter dialogue box.
To select the correct appointment letter, click on the drop down menu to select your school or college.

Navigate to your school/college and click select. The choice of Internal or External templates will display based on the candidate’s status.

Click “Select” to choose the appointment letter for your ESP. Then click Next.

Letter Prompt for ESPs - input a Prefix and the name of the course. Then click Next.
Your appointment letter has been created.

To view the E-offer Appointment letter, click on the recipient link. You may make edits or corrections directly in the body of the letter.

When you are finished reviewing the offer letter, click Send. The ESP will receive an email with a link to Taleo to accept the offer.

The ESP’s status will update to “Offer: Extended”.
Fictional Sample Letter

Dear Dr. Divil,

I am pleased to offer you a part-time appointment as an Adjunct Instructor in Temple University's Tyler School of Art, in the Department of Tyler School of Art. This offer is to serve as an adjunct member of Temple's faculty. This appointment is made without tenure and carries with it no current or future obligation on the part of Temple University. The term of appointment will begin on August 29, 2016 and will end on December 12, 2016, unless you are offered a subsequent appointment. There is no promise or guarantee of any subsequent appointment.

The responsibilities you will be required to perform during the term of this appointment are teaching Art History and providing appropriate opportunities for your students to have access toyou outside of the normal class time.

Your total compensation for providing this service will be $6,000, which will be paid to you in 4 monthly payments, beginning on September 1, 2016. The payments will be made effective the last business day of the month.

As Dean of the Tyler School of Art, I reserve the right to cancel the course (s) and/or commitment (s) to which you have been assigned if, in my sole discretion, it is appropriate to do so.

Adjunct faculty are eligible to make voluntary 403(b) contributions on a pre-tax or Roth 403(b) after tax basis and may be eligible for a subsidy towards the cost of health insurance. In addition, adjunct faculty on the Main and Ambler campuses are eligible for free parking, provided they are not also regular employees of the University.

This appointment is subject to all policies and procedures of Temple University and its Schools and Colleges. Applicable policies may be examined in the Office of the University Secretary or on Temple University's policy website (http://policies.temple.edu/). Please note that these documents may change from time to time. The official versions, which are maintained in the Office of the Secretary, will control at any given time. It is your obligation to maintain familiarity with these documents so that you have a full understanding of your commitments as an adjunct faculty member at Temple University.

If your appointment to the adjunct faculty is with compensation, please be aware that Temple's regular method to pay all new hires is through direct deposit into a bank account at a financial institution of your choosing. As a benefit to our employees, Temple University partners with PNC Bank to offer a free checking or savings account when an employee is paid via direct deposit. If you are interested in learning more about this benefit or want to open an account, you can visit any PNC Bank branch including the branch office located at 1900 Lieber Avenue on Main Campus.

By signing below and accepting this appointment, you represent and warrant that you have not been, and are not now, disciplined, suspended, disbarred, debarred or sanctioned by any federal, state or licensing agency and that you agree to immediately disclose to me if, at any time, you are threatened with discipline, suspension, disbarment, debarment or other sanction as described above.

Verification of your highest earned degree and/or professional license is a precondition of appointment. If we have not already received this, we will try to verify your degree and/or professional license through an online service. If we are unable to do so, we will ask you to provide us with an official copy of your academic transcript and professional license by the institution that conferred it. This will facilitate the timely processing of your appointment.

If this is your initial appointment to the Temple University adjunct faculty, you are also required to provide acceptable documentation to verify your eligibility to work in the United States as defined by the United States Citizenship and Immigration Services (USCIS). This information must be provided within three business days of your date of hire.

Temple University has an electronic new hire process which enables you to begin the completion of some required documents (I-9, W-4, Direct Deposit) prior to your start date. Once you have accepted this offer, you will be receiving a Welcome e-mail from Temple University Human Resources providing you with your TUID and a link to activate your AccessNet account. You will also receive instructions of verifying employment eligibility.

Once you have completed all the steps, please go to the Human Resources Department with all required documents. Human Resources is located on Main Campus on the lower level of Hilbert Hall at 1911 N Broad St, Philadelphia PA 19122 and on the Health Sciences Campus at the Student Faculty Center at 3340 N. Broad St, Suite 300, Philadelphia PA 19140. Note that this process is a prerequisite to receiving an ID card and getting access to Temple University and its systems. If you do not receive the email notification within a few days of acceptance of this offer, or if you need alternate HR locations, please contact Human Resources at 215-204-7174.

In your position, you will be involved with compliance activities for our student athletes. Therefore, in addition to Temple University's regular rules and regulations governing employment, you are required to abide by all NCAA and Conference rules and regulations governing intercollegiate Athletics. By accepting your position, you agree to comply strictly with any such rules and/or regulations. If the University, in its sole discretion, should determine that you have engaged in any deliberate or serious violation of the rules of the NCAA or applicable conference, you are subject to discipline including but not limited to termination of your employment with Temple University.

In the event you are asked to take on additional responsibilities during the term of this appointment and you accept those responsibilities, then all the conditions and obligations stated in this letter apply to those additional responsibilities with full force and effect.

The terms of this written offer of appointment constitute the entire terms and conditions of appointment, and the terms of appointment included in this letter may not be modified or altered by any oral statements or representations by or any written statements or representations. This offer may be modified only in writing signed by the Dean of the Tyler School of Art.

If, as I hope, you find this offer to be satisfactory as presented, please indicate your acceptance of this offer by your response and electronic signature below. An offer for which a signed acceptance is not received within ten (10) business days of the date tendered will rescind and become null and void.

Welcome to Temple University. I look forward to a productive and rewarding association during the term of this appointment.

Sincerely,

The Dean's signature

**Note – any lines are from the screen shot copies for purposes of this sample.
TRAINING TIP – If the ESP is an internal candidate, their TUid will appear on the E-offer appointment letter instead of the home address.

Tyler School of Art
2001 N. 13th Street
Philadelphia, Pa 19122

April 28, 2016

Dorothy Ryan

Re: Offer of Adjunct Faculty Appointment

TUID: 915312736

Dear Dr. Ryan:

To access a copy of the ESP’s offer letter, click on the History tab in the candidate’s profile.

You will see the title of the letter in the History tab highlighted in blue. You can click on the title of the letter to view a copy of the offer.
Hiring the Candidate

When the candidate responds to the offer, the Recruiter will receive a notification e-mail.

If the offer is accepted, then the Recruiter needs to log into Taleo to hire the candidate.

Open the requisition and navigate to the Candidate’s record to Change Step/Status. Click on “More Actions” and choose “Change Step/Status”.

The update of status to **Hired** will update Banner.

**NOTE:** If you are not receiving the option of “Change Step/Status”, you may still have the Tentative box from the Offer grid marked. To change this, go to **Update Start Date**. Uncheck “Tentative” in the pop-up box and click “Done.”
When in the Step/Status box, find the option titled “Start Process”. Check off the box and ensure that “Onboarding” is indicated in the “Select a process” dropdown area.

Click **Save and Close** at the bottom of the box.

If the hire is the last opening on the requisition, a warning will appear notifying you that the hire action will fill the requisition. Filling the requisition will automatically remove the opening from the Career site and all applicants on this job will be able to view that the position is filled.

**NOTE:** Once a requisition is filled, either through the final hire or manually from “More Actions”, all remaining candidates in the **Manager Review** or **Interview** steps will be automatically sent rejection emails.
Onboarding and Parking Authorization for Educational Support Professionals

When the ESP begins the parking process, the Hiring Manager will receive an e-mail that the Parking Authorization process has been begun. Clicking the link brings you to your Tasks.

You can also access your list of tasks from logging into Taleo. Sign into Taleo and click on Onboarding (Transitions) from the landing page.

The first section will be your tasks. You can locate your candidate by looking at the third column. Click on the action “Execute” to open the ESP Parking form.
When you click Execute, a form will open for you to complete the parking information. Select the amount of parking, enter the FOP information and click Submit.

After the Hiring Manager hits Submit, the Recruiter will receive an e-mail to Approve the transaction.

Department Recruiters can follow the same steps as above to access the parking authorization. Click “Execute” to open the authorization. You will be able to review the information entered by the Hiring Manager. At the bottom, choose either Approve or Disapprove and input your initials. Click “Submit” to send the authorization.
The task "Adjunct Parking Payment Authorization" has been assigned to you for candidate/new employee Dorothy Ryan. Please note that you must complete it by May 2, 2016.

Please provide the requested information.

Parking Authorization Form

Adjunct Parking Payment Authorization

Employee Name

TUid

Department

Adjunct faculty members who commute to a location with University-operated parking solely to perform their adjunct duties must be offered a parking pass from their appointing unit.

* The parking pass must equal the number of days of instruction assigned during the semester

Requested cost / admissions

Parking Admittances - Other

Department Account Information to be Charged

FUND

ACCOUNT

PROGRAM

EXAMPLE

8 digits: 3 digits: 3 digits: 4 digits

Fund

Organization

Account

7357

Program

Parking Approval - Do you approve?

Not Approved

* Please input your initials to authenticate your decision to approve or disapprove.

Enter your initials and click Submit to approve.

A report will be sent to Parking Services notifying them of the ESP’s name, TUid, and that parking has been authorized.
Candidate Facing Information

E-Offer

When the ESP receives the E-offer, they are presented with a link to Taleo, which contains their Appointment Letter.

Dear Hooter Owl,

It is with pleasure that we extend an offer of employment to you for the position Director of Engagement withdraw test (16001079) at Temple University.

To accept this offer, please click here and provide your response online. As a reminder, your User Name is hooter.owl. If you have forgotten or don’t know your password, click the ‘Forgot Password’ link on the login page. You may be required to respond before the offer’s expiration date, so please click to visit the site soon.

We recommend that you save or print a copy of your offer letter for your personal records. Please note that the system will only display this offer for a limited amount of time.

Once you have accepted our offer online, you will receive emails with onboarding tasks that need to be completed. Completion of these tasks is critical to your successful start here at Temple. Thank you for completing them on a timely basis.

We look forward to welcoming you in person!

When they scroll to the bottom of the letter, they can Accept the offer or Refuse the offer. The ESP signs with their initials.

Please indicate your acceptance of this offer be electronically signing below.

*Please provide your response
Not Specified
Not Specified
Refuse the offer
Accept the offer

Please input your initials as your electronic signature. This includes your middle initial if applicable.

NOTE: The ESP’s initials will match the name on their profile. For example, if the ESP has a first, middle, and last name on their profile, their e-signature will contain three intials.

EXAMPLE: John Michael Doe — e-signature would be JMD
Jane Smith-Jones — e-signature would be JS (not JSJ; hyphenated last names are seen as one name)
Onboarding

When the ESP has been hired by the Department Recruiter and Onboarding has been launched, the ESP will receive a “Welcome to Temple” email. The ESP will click on the link to log into Taleo to complete all Onboarding materials.

Welcome to Temple!

To access your offer of employment and to complete any related tasks, please click here.

Your User Name is hooter.owil.

Please note: we are providing you with User Name if your profile doesn’t already have one. If you have forgotten or don’t know your password, click the ‘Forgot Password’ link on the login page.

We recommend that you save or print a copy of your offer letter for your personal records. Please note that the system will only display this offer and completed tasks for a limited amount of time.

Thank you.

Welcome to Temple screen
Workers Compensation Rights and Responsibilities — ESP needs to e-sign with initials.

Job: Adjunct Faculty

Workers Compensation Rights & Responsibilities: Temple University

Mandatory forms are marked with red indicator.

EMPLOYEE RIGHTS AND RESPONSIBILITIES UNDER THE PENNSYLVANIA COMPENSATION ACT AMENDED EFFECTIVE AUGUST 23, 1996

If you are injured while working, you are required to report your injury to your supervisor immediately, even if you do not require medical treatment. You will be asked to complete an incident report form outlining the specifics of the incident in which you were involved.

If you require medical treatment, you must visit one of the Posted Health Care Providers for 90 days from the date of your first visit. These Health Care Providers are listed on the Posted Panel of Health Care Providers maintained at the Human Resources Office, Employee Health Services, and Occupational Health Services. The panel can also be accessed on the web at http://www.temple.edu/hr/departments/benefits/workercomp/panel.htm. Referrals to non-panel Health Care Providers prescribed by a panel Health Care Provider will be covered. However, other treatment or services provided by non-panel Health Care Providers may not be paid by Temple, therefore, you should consult with the Workers' Compensation Department at 215-204-4124 before unauthorized services are rendered.

If you require immediate emergency care, you are permitted to seek treatment from the closest Health Care Provider. However, follow-up care and visits must be done by a panel Health Care Provider for the first 90 days. Non-emergency treatment outside the panel will not be paid by Temple University.

If during the 90-day period you wish to change Health Care Providers, you may do so provided you visit another panel Health Care Provider. If you choose to change Health Care Providers after the 90-day period, it is your duty to send notification within five days of treatment to Temple University's Workers' Compensation Department, TASB (883-39) 1502 N. 10th Street, Philadelphia, PA 19122. Failure to provide such notification may relieve Temple of the responsibility for the payment of services rendered if such services are determined to have been unreasonable or unnecessary.

Both panel and non-panel Health Care Providers are required to accept payments for services as indicated by the Act. You will not be responsible for any charges in excess of those calculated under the Act, unless your treatments are unrelated to your work injury or you fail to follow proper protocol.

You are entitled to a second opinion by a physician of your choice for any surgical procedures recommended by a panel Health Care Provider. However, if you elect to follow the recommendation of the second opinion Health Care Provider, you must receive services from a panel Health Care Provider for an additional 90 days.

You are required to notify Temple University's Workers' Compensation Department, TASB (883-39) 1502 N. 10th Street, Philadelphia, PA 19122, in writing, within thirty days of any change in earnings, wages, social security, severance pay, pension, unemployment, disability, or any other income, and in a physical condition. Failure to do so could be punished under the fraud provision of the Pennsylvania Compensation Act.

The Act defines a fraud offense as occurring if an employee, attorney, etc., knowingly, and with the Intent to defraud, files a false or misleading document, statement, or claim. The penalty for fraud may be as high as a conviction of a third degree felony carrying a fine of not more than $500 or double the value of the fraud, and, imprisonment for a period of not more than seven years.

Note: Below the requirements are listed that an employer must meet to have a valid list of at least six (6) Providers. If the list does not meet these requirements, it is not a valid list, and you have the right to seek medical treatment for your work injury or occupational illness from any Health Care Provider of your choice.

REMEMBER, IT IS IMPORTANT TO TELL YOUR SUPERVISOR OR DEPARTMENT HEAD ABOUT ALL INJURIES.

NOTICE TO EMPLOYEES

1. Should you become injured on the job, compensation will be processed in accordance with the Pennsylvania Workers’ Compensation Act. You must report all incidents to your Department Head/Supervisor immediately and complete an incident report and an employee’s rights and responsibilities form. You can visit Employee Health Services or Occupational Health Services during the hours of 9:00 a.m. through 4:30 p.m., Monday through Friday (Emergency Room during off-hours) for all injuries. FOR ALL EMERGENCIES CONTACT CAMPUS POLICE AT 215-204-1224 or 1-1224 from a campus phone.

2. In order to ensure that your medical treatment will be paid for by your employer through its Workers’ Compensation program, you must treat with one of the Posted Panel of Health Care Providers.

3. You must continue to visit Temple Occupational Health or one of the Posted Panel of Health Care Providers, if you need treatment, for ninety (90) days from the date of your first visit. Should you desire to seek treatment from a non-posted Health Care Provider during this period, payment to such a Health Care Provider by your employer may be jeopardized.

4. After ninety (90) days, if you still need treatment, you may continue to be followed by Temple Occupational Health or one of the listed Health Care Providers. You may seek treatment from another Health Care Provider. In this case, you must notify SCIBAL ASSOCIATES, INC. or Temple University’s Workers’ Compensation Department within five (5) days of your visit to such a physician. That physician must file a report within ten days of your first visit and at least once monthly thereafter as required by the PA Workers’ Compensation Act.

5. Contact SCIBAL ASSOCIATES, INC. at 215-926-2272 if you have any questions.

REQUIREMENTS FOR A VALID LIST OF HEALTH CARE PROVIDERS

1. There must be at least six (6) health care providers on the list, but there may be more than six (6) listed.

2. At least three (3) of the health care providers on the list must be physicians.

3. No more than four (4) of the health care providers on the list may be coordinated care organizations (CCOs).

4. The names, addresses, phone numbers and areas of medical specialties of all health care providers must be included on the list.

5. The health care providers on the list must be geographically accessible and must have specialties that are appropriate based on the anticipated work-related medical problems of the employees.

6. Your employer must specify on the list any of the health care providers on the list are employed, owned or controlled by your employer or its workers’ compensation insurance company.

Note: The list of health care providers must meet all of the above requirements. If the list does not meet all of these requirements, you do not have to choose a provider from the list. Instead, you have the right to seek medical treatment with any health care provider of your choice.

Your signature on this form indicates that you understand your rights and duties under the above provisions of the Workers’ Compensation Act; and, that this notice was presented to you at time of hire.

I hereby acknowledge that I have been informed of, and understand my rights and duties under the Workers’ Compensation Act.

3/31/2020 taleo@temple.edu
Parking Application – ESP completes reason for needing parking, vehicle information, picks a garage, and initials the application.

Job: Adjunct Faculty

Adjunct Parking Application

Employee Name

Dondy Ryan

TDD

813-512-79

Department

Tyler School of Art

Adjunct faculty members who commute to a location with University-operated parking solely to perform their adjunct duties must be offered a parking pass from their employing unit. The parking pass must equal the number of days of instruction assigned during the semester or an equivalent allowance.

*Please select one of the following:

I am not currently in a full-time position, and I need parking at the Main or Ambler campus.

If you need a parking pass, please select your parking area of choice:

Main Campus-Montgomery Garage
Main Campus-Liacouras Garage
Ambler Campus

If you are retrieving a parking pass, please provide the requested information about your vehicle:

Make

Toyota

Model

Prius

Color

Gray

Year

2015

License Plate Number

Temp.

State

PA

Part-Time Parking Agreement

As a part-time parking, I hereby agree to abide by the following rules and regulations:

1. My parking pass is solely to be used to perform my adjunct duties.

2. Temple University assumes no responsibility for theft, fire, damage to or loss of use of either my vehicle or my accessories or its contents.

3. The University has the rights to close parking facilities due to inclement weather. Parking access will be provided during these periods at an alternative location.

4. My permit must be hung inside my vehicle, on the basis of the rearview mirror. Vehicles found not displaying their appropriate University parking pass as well as the use of their Temple ID card upon entrance will result in the assessment of the daily cash rate.

5. I understand that if I may be reassigned to a different parking area.

6. Your parking benefits are not activated until you come to Parking Services Office to pick up your hang tag. Please visit and do not come to Parking Services until you receive an email notification that your hang tag is ready to be picked up.

Signature

Please enter your signature in your electronic signature. This includes your middle initial if applicable.
After the ESP completes the request, the department must authorize payment (see pages 47-49 above).

After parking is authorized by the department, the ESP receives an e-mail that they may go to Parking Services to pick up their permit.

Dear Dorothy,

Please allow one business day for processing your permit. Then it will be ready to be picked up at Parking Services. Please bring your Temple ID card when you come to pick up your permit.

Please note: Your parking benefit is not activated until you come to Parking Services Office to pick up your permit. As a reminder, the permit must be hung inside your vehicle, on the back of the rearview mirror. Vehicles found not displaying the appropriate University parking permit or failure to use your Temple ID card upon entrance will result in the assessment of the daily cash rate.

Thank you for your prompt attention,

Temple University
Office of Parking Services
http://www.temple.edu/parking

Main Campus Office:
Montgomery Garage
1859 N. 11th Street
Phone: (215) 204-5301
Monday - Friday (8:30 AM - 5:00 PM)

Ambler Campus:
Bursar’s Office
Room 101 West Hall
Phone: (267) 468-8250
Monday - Thursday (8:30 AM - 5:00 PM)
Friday (8:30 AM - 5:00 PM)
Modifying Duties after Hire

If your ESP has been fully hired into the system and their duties have since been modified, the following steps allow you to inform them of any changes.

You do not need to send a new appointment letter, as there is language in all letters covering a change in duties. You will be sending a correspondence from the system to inform your ESP of the changes.

First, open the requisition on which the ESP was hired and go to your list of candidates. Make sure you include candidates not in the selection process when you do this. The filter can be turned off on the left-hand side of the page under “Candidates”.

**Note:** the ESP’s Step/Status must be Hire/Hired.

Click on the candidate with modified duties to open their profile and then click on More Actions. Choose “Send Correspondence” from the options shown.
Select **Email** from “Send message by” at the top. Choose **From Template** below. Use the Template Selector to choose the **ESP Modified Duties Template** for your School/College. Leave all sections checked and hit the Next button in the lower right. This will bring you to the Message Preview.

Click **Review All** on the bottom left, then click on the ESP’s name in blue to review the email message. Please complete the fields highlighted in blue:

**Please complete the fields highlighted in blue:**

Hit Save to save the changes.
**Note:** you can print a copy of the message after saving from the Send Correspondence window.

---

Center for the Performing and Cinematic Arts
Boyer College of Music and Dance
2001 N. 13th Street, Presser Hall
Philadelphia, PA 19122

August 23, 2016

This is to confirm that we discussed a modification in duties from those listed in your August 9, 2016 appointment letter for the current semester beginning on September 1, 2016. Except for the revised assignment listed below, all other responsibilities and obligations contained in the original letter apply as if restated here.

**MODIFIED ASSIGNMENT**

(LIST ALL ASSIGNMENTS, ORIGINAL AND NEW)

Your compensation for your services, as modified, will be $_________ monthly. Please do not hesitate to contact me if you have any questions, need additional information or need a copy of the original appointment letter for reference.

In order to ensure that you receive the correct compensation, please be sure to “reply all” to this e-mail signifying your receipt.

Thank you very much for your service to the University.

---

Hit Send. You will be prompted to write a message. Please include a reminder to the recipient to “reply all” in order to accept the modified responsibilities and pay.

Hit Send.

When the ESP “replies all,” Payroll/Data Management will receive the response.

**Do not rescind the previous E-offer.** There is no further action required of you unless the modified duties require a different FOAP. If you are paying with a FOAP different from the original E-offer, you will need to complete an EPAF.
Addendum: Rescinding and Resending Offers

NOTE: If you have extended an offer to an incorrect or invalid email or must make changes to the offer itself, the offer must be rescinded and revised before being resent. Otherwise, the original offer will continue to be sent.

Navigate into your requisition’s list of candidates and choose the candidate you are revising the offer for. Click on their name to open their profile.

Go to More Actions and choose Rescind Offer.

Input a comment in the pop-up window and click Done.
After the screen updates, go to More Actions and choose Create Offer. This will open the offer grid with new fields to fill in for the updated offer.

If any offer details will remain the same, the previous offer can be copied over. Hover under the paperclip symbol shown with the previous offer and click on the two arrows that appear there. All fields can also be re-entered manually.
After offer details are copied, **make changes** to fields that need to be changed.

Click **Save and Close** when finished creating the offer. Then, go to **More Actions** and choose **Extend Offer** or **Request Approval**. Follow the same steps for extending the offer as before.