

# ANR CATS CHECKLIST FOR POSITION DESCRIPTION, POSTING, RECRUITMENT, SELECTION, HIRING AND POSITION CLOSE OUT

AA = ANR Affirmative Action  
SPU = Staff Personnel Unit  
SPR = Staff Position Request

## 1. Enter/New or Existing Position Description

- UCCE Office (*Hiring Manager/Designee Approver*) consults with the Staff Personnel Unit (SPU) to go over CATS process and provide copy of this document.
- SPU (*Department Approver*) explains to the Hiring Manager/Designee how to sign them up as a CATS user, provides electronic copy of the Staff Position Request (SPR), and provides the web address of CATS.
- Hiring Manager/designee obtains all required approvals from UCCE Office and Business Operations Center.
- Hiring Manager/Designee obtains position background information (i.e. old job description or existing position in CATS position description library). Particular information is necessary prior to creating a position into CATS (i.e. classification log #, library #, payroll title or working title). If you have questions contact the SPU at [anrstaff\\_personnel@ucdavis.edu](mailto:anrstaff_personnel@ucdavis.edu).
- Hiring Manager/designee enters into CATS. Select “*Begin New Action*” located on the left side navigation bar. Review instructions to determine position to be created, “*New Position, Reclassify Position, Update Position, and Existing Job Description*”, then select the type of position. Once you select the position to be created you will be forwarded to a new page requesting you to search for information regarding position you want to create. Refer to the previous step to determine information needed to be entered for your search. Once entered you will be directed to the positions and requested to “*select and continue or start action*”.  
**(Action: Log into CATS, “Begin New Action”, “select and continue or start action” )**
- The Hiring Manager/Designee moves through all tab sections and provides all requested information regarding position into CATS. When entering into the tab “*Attach Supplemental Documents*” you are required to attach the approved SPR, Organization Chart and any other supporting documents. After each tab section you will be requested to “*continue to next page*”. **(Action: “Continue to next page”)**
- After Hiring Manager/Designee enters all the information and completes the job description, print out the proposed job description, record the classification and library number (to be used when creating job posting), send position to Department Approver within CATS. **(Action: Department Approver Review)**
- Department Approver reviews and sends to Compensation for review of classification and approval. If this is an existing position Compensation reviews to ensure the information entered into CATS is the same as the previously classified position description. **(Action: Central Compensation Review)**
- Compensation approves position and classification. CATS will send an e-mail to Hiring Manager/designee. **(Action: Approved New, Reclassified, Updated or Existing PD)**

## 2. Create Posting

- Hiring Manager/Designee enters into CATS and selects “*create requisition*” located on left side of navigation bar. After selecting “*create requisition*” the screen “*Create from a position*” will appear. Enter the library or class log number for the above approved position,

move through all the tab sections, provide all information requested. Add in comments, such as identified candidate or limited term with recruitment or career recruitment. Once completed with each tab section select “*continue to next page*” at the bottom of each section. Once you have provided all information requested in each tab section you will send posting requisition to Department Approver. ( **Action: Departmental Approver Review**)

- Requisition is forwarded to Departmental Approver who will review all information in each tab section and send to ANR /HR & AA through the CATS process. (**Action: ANR Jobs- Recruitment Review**)

### 3. Recruitment Process

- Employment works with Hiring Manager/Designee to ensure the requisition is complete and accurate. This includes setting up the guest user account in anticipation of the use of a review panel process. Employment enters posting and closing date. ( Note: if department would like to consider extending closing date, must notify Recruitment at a minimum of at least three days prior to original closing date).
- When Recruitment approves requisition it is sent for Affirmative Action initial review. (**Action: ANR Jobs – Affirmative Action Initial Review**)
- Once position has been posted on CATS/UCOP web site, recruitment sends email to Jeannette Warnert asking her to also post position on ANR Job Site. HM/Designee can post position on additional web sites, upon request.

### 4. AA review

- AA reviews and enters information on underutilization, ADA language, minimum qualifications and search plan (e.g. interview questions, search/selection committee members, advertising outreach, etc.).
- Once requisition has been approved by both AA and Recruitment the position is automatically posted on the CATS web site and Recruitment, Department Approver, and Hiring Manager/Designee are notified via an e-mail from CATS. (**Action: Posted**)

### 5. Application and Interview Pool Review Process

- All applicants apply on-line only. We cannot accept paper applications.
- On-line applications are available for immediate review by the Hiring Manager/Designee.
- Hiring Manger/Designee should attach the Search Plan documents under “*Recruitment Documents*” tab section. The Search Plan includes the interview questions and search/selection committee members, advertising outreach, etc.).
- Hiring Manager /Designee or Search Committee Chair (e.g. Guest User’s) reviews applications and selects, but does **NOT** yet schedule, best-qualified candidates for interview.
- Hiring Manager/Designee or Selection Panel Chair Person enters and saves reasons for interview pool selection and non selection of all applicants within CATS. *Please note if Chair Person is not designated as a Hiring Manager/Designee user they will not be able to change the status of the applicants. If the Chair Person needs to be designated contact HR/ANR* (**Action: Change Status**).
- After a change in status has been completed for all applicants save and submit to Department Approver for review. (**Action: To Department Approver**)
- All AA Applicant Flow Summary and Applicant List forms are automatically completed by the system.
- Departmental Approver reviews interview pool and reasons for selection or non-selection and

sends to AA for approval through CATS. All applications and resumes are automatically available for AA review. **(Action: Affirmative Action Review Interview Pool)**

#### 6. AA Review

- AA reviews interview pool and sends approval back to Hiring Manager/Designee through CATS. CATS will generate an e-mail to Department Approver and Hiring Manager/Designee. **(Action: Interview Pool approved by Affirmative Action)**

#### 7. Interview Process

- Hiring Manager/Designee schedules and interviews candidates, checks references, and makes final selection. (Among the post-interview comments recorded on the Applicant List, a ranking of the top two or three candidates is helpful. In the event the top candidate declines the position, if the applicants are ranked, an offer may be made immediately to the second-choice candidate without additional approvals or signoffs should the 1<sup>st</sup> choice candidate decline.)

#### 8. Final Candidate Selection Approval

- Hiring Manager/Designee selects proposed final candidate for hire and changes applicant status to “*proposed for hire*”, saves and go to the last tab to continue to “*Posting status*” selects send to department approver to review selected candidate. **(Action: Send to Department Approver Review Selected Candidate)**
- Department Approver reviews and approves selected candidate. CATS will send position to ANR/AA for approval. **(Action: AA/ANR Review Selected Candidate)**
- AA reviews and approves final candidate. CATS will send the position back to hiring manager/designee. **(Action: Selected Candidate approved by Affirmative Action)**

#### 9. “Hiring Details” Approval

- Hiring Manager/designee, *before offer is made* must enter proposed salary recommendations into “*Hiring Details*” tab section. Proposed salary offer, start date, and information about probationary period (if applicable) are included. Attach selected candidates proposed offer letter or justification for above mid point/mid step salary document, if needed, into “recruitment documents” tab section of position requisition; submit to Department Approver for review. CATS will generate e-mail to Department Approver. **(Action: Departmental Approver review of Hiring Details)**
- Department Approver (SPU) reviews “hiring details”, selected candidate, salary offer and all attached documents. **(Action: HR Salary ANR/CEB Salary Review)**
- SPU reviews the salary recommendation, if applicable), and approves or provides revisions, as needed. Hiring Mgr/Designee notified through CATS e-mail. **(Action: All Approvals Obtained (Hiring Detail Approved))**
- Hiring Mgr. /Designee makes verbal offer to first choice candidate, sends offer letter to hired applicant and obtains signature. Once offer is accepted Hiring Mgr/Designee goes into CATS tab “*Hiring Details*” changes the status of the applicant to “*Hired*”. **(Action: Hired)**
- For critical positions, Hiring Mgr. completes background check request forms and returns them to SPU for completion of background check.
- If you have **two or more hires for one position** requisition you will need to first complete the above step for the first hiring recommendation and receive all approvals so first candidate is

changed to “*Hired*” status. For second candidate you will need to **1.** create a second Position Description and library number by going to the navigation bar on the left and “*Begin New Action*” and select “*New Position*”; **2.** Input the payroll title on the first tab, identify the position and then “*select and continue*”; **3.** After moving to the next tab “*Copy approved position*”, you will then be prompted to again search for the position , enter the payroll title and “*select and continue*” to copy the approved position description you want filled with the second candidate; **4.** Once completed you then need to move to the “*Reason for Action/Questionnaire*” tab and complete all requested information, most important in the reason for position type “reason for the position as a second hire on Requisition XXXX and cross reference the original position requisition Library number, then move through the last tab to submit PD and receive approval. **5.** Once PD has been approved you will receive the new library number on the e-mail notification. **6.** After receiving the library number you will enter into CATS and select the original position for which you already hired the first candidate and begin “*Hiring Detail*” for the second hire in the applicant list. **7.** On the “*complete Hiring Detail for Job Description*” screen, select the second choice titled “*Hiring recommendation for other Job description*. On the next screen, enter the second Library Number, and then proceed with the Hiring details Recommendation and receive approvals until you can change the applicant status to “*Hired*”. Proceed with the above 1-7 steps for as many hires, as needed.

#### **10. Close-Out Process and Position Filled**

- Hiring Mgr/Designee makes note of start date and probationary period, goes into CATS to printout position description to review with new hire, and reviews all information in the recruitment documents section to determine if all required documents have been attached and sends to department approver for close out. (**Action: Return to department for Close Out**).
- SPU provides county with hiring documents.
- BOC (located in Kearney) preparers completes all hiring documents and entry of new employee into payroll system, informs county of new hire ID number and timesheet information.
- Department Approver reviews all required documents that have been attached and changes status of position in CATS to “*position filled*”. (**Action: Position Filled**)
- Hiring Mgr and new employee sign position description. Hiring Mgr provides employee with copy and sends copy to BOC (located in Kearney) with employment forms.
- Once completed CATS will change the position status to “Position filled” and automatically generate notification emails to the rest of the candidates that a selection has been made or the position has been filled.

**Please note if you are having difficulty following the checklist or need further details on entering information into the CATS system, you should consult the ANR Hiring Manager User Guide located at (Web Link). If you are still having difficulty you can contact ANR – Staff Personnel.**