Talent Recruitment and Engagement Management System (TREMS) Training Resource Guide

Division HR

Welcome to Talent Recruitment and Engagement Management System (TREMS) training! This training is required prior to requesting and receiving access to TREMS.

Recruitment on the UW-Madison campus is unique and complex across divisions. Upon completion of this course and with the help of this resource guide, participants will be able to create job postings in TREMS, utilize the search committee and events functions, manage applications, create, and send the online offer card, and more.

As you progress through the training, partner with your division human resources team to discuss activities or responsibilities.

Required trainings:

- Introduction Module
- Module 1: Creating the Job Card
- Module 2A: Application Overview
- Module 2B: Application Management
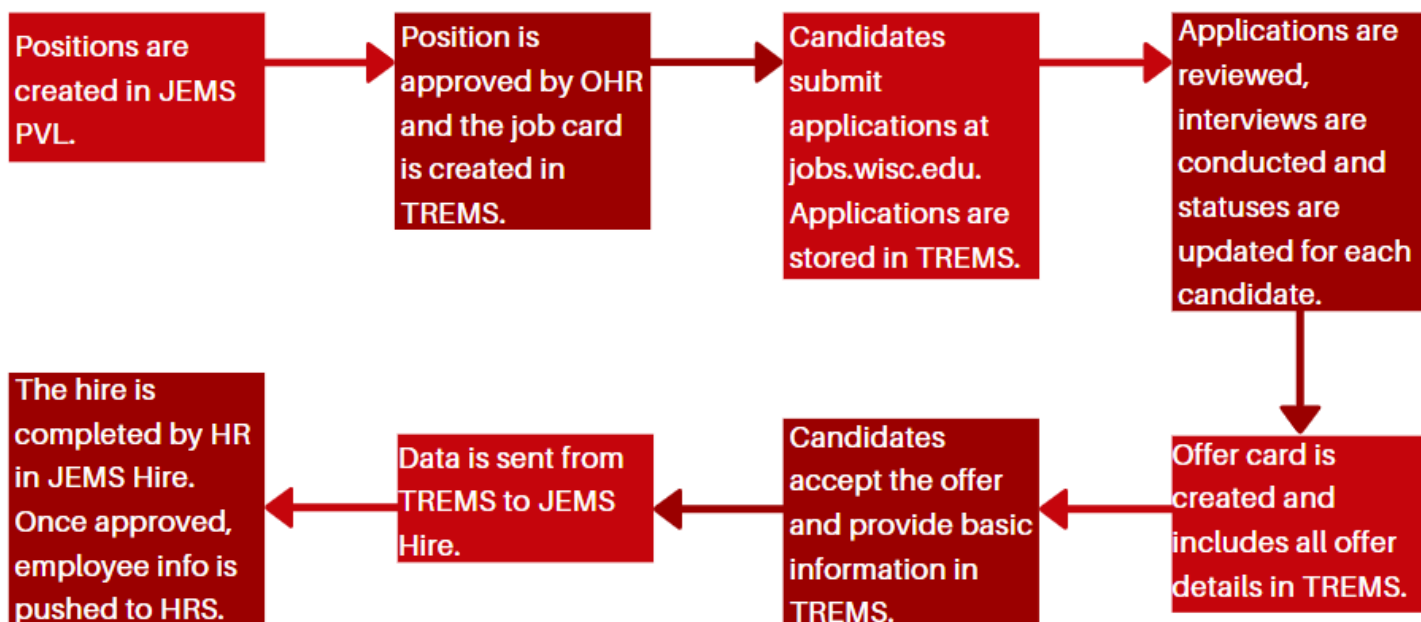- Module 3: Creating and Sending the Offer

Additional trainings:

- Tag's Training 1A: Search Committee Functionality
- Tag's Training 1B: Participating in a Search Committee
- Tag's Training 1C: Adding Documents to the Job Card
- Tag's Training 2A: Adding Documents to the Applicant Card
- Tag's Training 2B: Add Activity and Changing Statuses Retroactively
- Tag's Training 2C: How to Use Events
- Tag's Training 3: Accepting the Offer

| Positions are created in JEMS PVL. | → | Position is approved by OHR and the job card is created in TREMS. | → | Candidates submit applications at jobs.wisc.edu. Applications are stored in TREMS. | → | Applications are reviewed, interviews are conducted and statuses are updated for each candidate. |

| The hire is completed by HR in JEMS Hire. Once approved, employee info is pushed to HRS. | ← | Data is sent from TREMS to JEMS Hire. | ← | Candidates accept the offer and provide basic information in TREMS. | ← | Offer card is created and includes all offer details in TREMS. |

Positions are created in Job and Employee Management System (JEMS PVL). Once the position is approved by the Office of Human Resources (OHR), you will create the job card in TREMS. Candidates will submit applications at jobs.wisc.edu. These applications are stored in TREMS.

Within TREMS, you review applications, update applicant statuses, and track interviews for each candidate. Once you have completed your assessment and selection process, you will create an online offer card that includes all offer details. The candidate will review and accept the offer from their applicant account and provide basic new hire information in TREMS.

This information is then sent to JEMS Hire. The hire is completed by HR in JEMS Hire and once approved, the employee information is pushed to the Human Resource System, HRS.

TREMS is used to recruit for these employee classifications:

Academic Staff (AS)

Faculty (FA)

Limited Appointees (LI)

University Staff (US - CP, CJ)

Temporary Employee (TE)
*If open recruitment is chosen

These classifications do not go through TREMS:

- Student Assistants (SA)
- Student Hourly (SH)
- Post-Degree Training (ET)
- Waivers

! There is a TREMS toolkit located at https://hr.wisc.edu/hr-professionals/systems/trems/ that has a resource for most TREMS functions to help you become a TREMS pro! Bookmark this toolkit.

Before starting Module 1, please take a few moments to complete two items:
- Partner with your Division HR to review and record your division's recruitment process.
- After learning how recruitments are conducted in your division, discuss and record what your role will be with recruitments.

My division's recruitment process:

My role with recruitments:

Module 1: Creating the Job Card

Once your position has been created in JEMS and approved by OHR, you are ready to create the job card in TREMS.

Here are the steps to create the job card:

1. Click on the PageUp Menu from the dashboard.
2. Click on 'New job.'
3. Type the full JEMS Transaction ID into the box and click on the binocular icon.
4. To review the job information, including JEMS Transaction ID and job title, click on the arrow and then click 'Next.'
5. The job card will appear with data pre-populated from JEMS. Starting at the top of the job card, copy and paste the full JEMS Transaction ID from the 'Position No' field into the 'JEMS Transaction ID' field.
6. Choose whether the position is 'New' or 'Replacement' from the Type dropdown menu. This should match what's in JEMS.
7. If you have multiple vacancies, add them by typing the remaining number of vacancies into the New and/or Replacement fields. For example, if there are 3 vacancies, you must add 2 more into the New and/or Replacement fields. Finish by clicking on the 'Add more' button.
8. Select the 'Reports to manager name' by typing it into the field or by clicking on the magnifying glass icon to search.
9. Determine if you will utilize the search committee function in TREMS. If you wish to utilize the search committee function, choose 'Yes', then select your Search committee chair and members.
   a. Tip: Tag's Training 1A offers an overview of the search committee function. For additional information on Search Committee use within TREMS, review the corresponding help documents on the TREMS toolkit.
10. Within the Job Posting section, choose the 'Work Type' and 'Work location' from the dropdown menus. The Work Location Type and Job Group and Subgroup will flow from JEMS PVL. Edits cannot be made to these fields.
11. Select the 'application category' as well as the 'application type'.
   a. Tip: Your application type must match the 'How to Apply' information from JEMS. For more information on application types, review the 'Application Types Overview' help document on the TREMS toolkit.
12. If you would like to collect the contact information for three (3) references within TREMS via the use of the Reference Form, choose 'Yes'. If you prefer to collect reference information later or via a List of References upload within the application, choose 'No.'
13. Create an advertising summary to attract job seekers to your vacancy. Use brief, plain language to highlight main points of the job description.
14. Follow the directions in TREMS to generate the Advertisement text from JEMS: Press the 'Generate Description' button to populate the Advertisement Text. Clear the 'Advertising Text from JEMS' field by selecting all text (Ctrl-A) and press the Delete key. The formatted template will appear in the 'Advertisement Text' box.
15. Choose the Recruitment process from the dropdown menu. An option for Faculty recruitments is to automatically have an email request sent to each reference listed on the application for Letters of Reference/Recommendation.
   a. Tip: For more information on this function, review the corresponding help documents on the TREMS toolkit.
16. The next section is called 'JEMS Reporting Information.' All information in this section automatically populates from JEMS. You do not need to type or change anything in these fields.

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17. If needed, choose a Hiring Delegate for the position. A Hiring Delegate is an alternate contact that will have access to this recruitment in TREMS.

18. Review the Team ID. The Team ID must match the UDDS in the 'Posting title' field.
19. The 'Hiring Administrator' field will default to your name as the job card creator.
20. Choose your division from the Approval process dropdown menu. Once your division is chosen, fill in the appropriate Department and/or Division HR approval contacts by typing the names into the field(s) or by clicking the magnifying glass icon to search.
21. Click the 'Status' dropdown menu and choose 'Approved.'
22. To finish the job card and send it to the next approver in your division's process, click the 'Save' button.

Note Space for Module 1

Module 2A: Application Overview

Once your position has been created in TREMS and gone through the proper division approvals, your Talent Acquisition Specialist will post your job to the employment website at jobs.wisc.edu. When your job is live on the employment website, job seekers can begin submitting their applications.

When you are ready to begin reviewing applications, you will navigate to the job card from your dashboard.

Here are the steps to review applications:

1. To navigate to the job card, click 'Jobs' from the top of the dashboard.
2. You can search for the position multiple ways. It is recommended you click on the little green plus sign to show expanded search criteria and search by JEMS Transaction ID.
3. Click the Title link to open the job card. Then, click the View Applications button on the top right. This will take you to the applicant list.
4. Click the first name of the applicant you wish to view. This will open the applicant card in a new window.
   a. Tip: Make sure pop-up windows are allowed!
   b. The top portion of the applicant card contains personal information such as address, phone number and email address.
5. From the Applications section, you can view the application form. Think of this as the complete application, which includes all questions answered and document uploads.

A feature within the Applications section is the 'More Actions' menu. Commons actions taken from this menu include 'Add Activity,' 'Add Document' and 'Communicate.' Tag's Training 2A will go into more detail on activities and adding documents.

The 'Add Activity' function is useful when retroactively changing an applicant's status. The 'Add Document' function allows you to upload additional materials such as transcripts, letters of recommendation, or any other documents relevant to the applicant that must be stored as part of the recruitment file.

Communicating via the 'More Actions' menu ensures your communication is recorded as part of the recruitment file for the applicant.

! Do not use the 'Actions' menu in the upper right corner of the applicant card! Actions taken from this menu are not recorded and cannot be tracked.

The History section is a record of all recruitment actions and items associated with an applicant. This section can be filtered by job or item. Examples of items captured in the History section include Application submissions, Event Bookings, Communications, and Notes.

To navigate between applicant cards without closing the window, use the arrow buttons in the bottom right of the applicant card.

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Note Space for Module 2A

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Module 2B: Application Management

Status changes are an important part of managing applications. It is important that status changes are made as they occur for campus reporting requirements!

Here are the steps for single applicant status changes:
1. From the applicant list click the status link next to the applicant's name. This will bring up the 'Change application status' window. Select the desired status and click 'Next.'
    a. Tip: For a status change into 'Verbal offer,' you must change the status from the applicant card. You'll learn more about this in Module 3.
    b. Tip: You can use events as part of your application management for statuses such as 'Phone screen,' and 'Interview.' For more information, go to 'Tag's Training 2C: How to Use Events.'
2. Based on the status selected, a communication template may appear. Review the communication and make minor changes, if needed. Take this opportunity to personalize the email to provide the best possible applicant experience!
    a. Tip: Change the 'From' email address to your own and include your signature. If you don't wish to send the applicant an email, maybe because you have already discussed the status move via phone, click 'No' to bypass sending an email. You can review the 'Application Statuses' document in the TREMS Toolkit.
3. Once the communication has been reviewed, click 'Move now' to complete the status change.

Bulk actions are activities that can be performed on multiple applicants simultaneously. Selecting multiple applicants at once for a particular action can save time. If bulk actions are not used properly, incorrect communications may send to applicants, status changes may be made in error, or online offers may be incomplete.

The bulk actions menu is found in the applicant list for a job. The bulk move function allows you to move multiple applicants into the same, next status.

Here are the steps for bulk status changes:
1. Select the applicants from the applicant list by clicking the box next to their names.
2. From the bulk actions menu, choose 'Bulk move.'
    a. Tip: DO NOT use the bulk move feature when moving a candidate into any of the offer statuses, including 'Verbal offer,' or 'Online Offer Made.'
3. Choose the appropriate status from the dropdown menu, then click 'Next.'
4. To complete the status move, click the 'Move now' button at the bottom of the screen.

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Note Space for Module 2B

Module 3: Creating and Sending the Offer

After the candidate verbally accepts the terms of an offer, you will create the offer letter using the appropriate template available on the recruitment toolkit. You are now ready to create the offer process in TREMS.

Here are the steps to create the offer card:
1. Open the applicant card for the selected candidate.

> **!** Two status changes will be required to complete the offer process. Let's start with the first, moving the candidate into 'Verbal offer' status.
> a. Tip: A very important tip to remember through the offer process: DO NOT use the bulk move feature when moving a candidate into any of the offer statuses, including 'Verbal offer,' or 'Online Offer Made.'
> b. Tip: Pay attention to the light gray text for helpful hints on how to accurately complete the fields.

2. Click the status to begin the offer card creation.
3. From the 'Change application status' pop-up, choose 'Verbal offer' and click 'Next.'
4. Confirm the status change by clicking 'Move now.'
5. The offer card will appear. The 'Personal details' and 'Job details' sections are for review only. No data entry is required. The 'Offer Details' section contains specifics of the offer.
6. The 'Selected title and title code' field automatically populates with the official title(s) from JEMS. Delete titles that do not apply.
   a. Tip: DO NOT edit the selected title and title code! This means no extra spaces, letters, numbers, or special characters.
7. Select the start date by clicking the calendar icon.
8. If the appointment is terminal, select the end date. The end date must match PVL.
9. Enter the FTE. The FTE should be entered as a whole number and not a decimal. For example, a 1.0 FTE should be entered as 100.
10. Choose the appropriate probation period type from the dropdown menu. A probation period is not required for temporary (TE), Limited (LI) or Faculty (FA) employment classifications.
11. Indicate if a background check and/or I-9 is required.
12. Select the 'New employee details - New start form' from the 'New starter form' dropdown menu. Then select 'General onboarding' from the 'Onboarding workflow' dropdown menu.
13. The Reports to Manager will automatically populate from the Job Card. If the Reports to Manager has changed, click the Erase icon and enter the name of Reports to Manager. Use the Search icon to search for the name if necessary.
14. The Onboarding Coordinator will automatically populate with Reports to Manager name. Update to the name of the onboarding coordinator in the unit. Click the Erase icon and the enter name of the Onboarding Coordinator. Use the Search icon to search for the name if necessary.
15. The 'Offer progress' fields are system generated and default to 'No.' Do not edit these fields.
16. On the offer card, you will add all the documents associated with the offer. Documents include the offer letter and offer letter attachment, as well as other required documents such as a copy of the position description, Academic Staff Policies and Procedures or Faculty Appointments Links to Policies.

Note Space for Module 3