Contents

Overview

This job aid will go over how to create and manage Certifications in TAM.

Creating a Certification

1. In the Job Opening, go to the **Register** tab.

2. Prior to creating a Certification, click the **Refresh Register** button to ensure the most up-to-date applicant information is on the register.
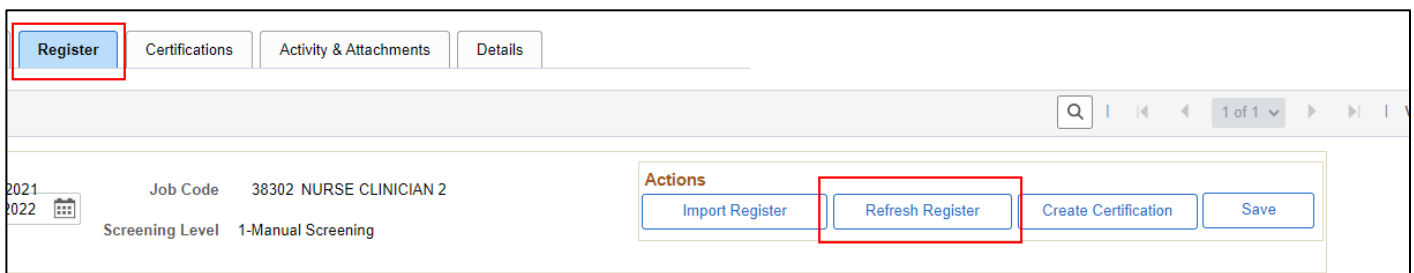
3. Once you are ready to create a Certification, click the **Create Certification** button.
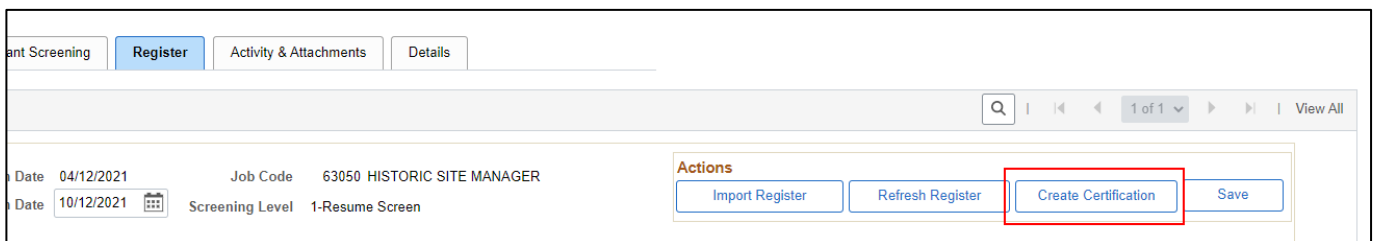
4. The certification criteria options will display in a pop-up. Select the appropriate certification criteria.

    1. If you used one or more of the **employment questions**, the answers associated with those questions will display as certification criteria.

        i. If you do not want to certify based on Full/Part-Time or Shift Preference, do not check any boxes in those sections.

Certification Criteria

Empl Question - FT/PT

| ☐ | Full-Time |
| ☐ | Part-Time |

Empl Question - Shift Preferen

☐	1st Shift
☐	2nd Shift
☐	3rd Shift
☐	Seasonal

Recruiting Locations

| ☐ | Portage |
| ☐ | Oshkosh |

    2. If you did not use the employment questions in your Job Opening, they will not display as certification criteria – only Recruiting Location(s) will display.

New Certification

Certification Criteria

Recruiting Locations

| ☑ | Adams |
| ☐ | King |

Select All   Un-select All

▶ **Additional Certification Methods**

*Certification Rule   Basic-005 ▾   # of Registrants   11

                                              # of Vacancies   1

Create Certification   Cancel

    3. At a minimum, you must select at least one recruiting location – even if there is only 1 location on the job opening.

Certification Criteria

Recruiting Locations

☑ Madison

[Select All]   [Un-select All]

▸ **Additional Certification Methods**

*Certification Rule   Basic-005 ▾   # of Registrants   8

                                            # of Vacancies   1

[Create Certification]   [Cancel]

    i.   If there is more than one recruiting location on the Job Opening, you can click the **Select All** button if you want to certify for all locations at once. If using different post-cert screening processes for locations, you may want to create certs for each location to better manage each process. See the Creating Multiple Certifications section.

☑ Waupaca County

☑ Waushara County

☑ Winnebago County

☑ Wood County

[Select All]   [Un-select All]

4.   Select the applicable **Certification Rule**

    i.   Options range from All Qualified and Basic – 005 to Basic – 500.

5. Enter the **# of Vacancies**

    i. The # of Vacancies entered does not drive any automated system functionality. For example, if you initially enter "1" as the number of vacancies, you can hire more than 1 person from the certification created.

6. Click **Create Certification**.

5. The Certification will initially be in **Draft** Status.

1. While still in Draft status, you can increase (not decrease) the Certification Rule by clicking on the down arrow in the **Certification Rule** field and selecting a different value.

2. The following will display. Click **Yes** to continue.

3. A row will be added that will have the new Certification Rule.

6. If you want to decrease the Certification Rule, even while in Draft Status, you will need to create a new Certification.

   Start over at Step 1 of Creating a Certification.

    Once you are satisfied with the cert results, while still in Draft Status, go back and delete the previously sequenced cert(s) that will not be used. Be sure to choose the correct row before preparing to delete.

    Delete it by clicking the **Delete** button.

    This is the only case where it is allowed to delete a certification. Don't delete any finalized or ACTIVE status cert versions that were used, updated or those that are eligible to be rescinded. These certs are recruitment records to be maintained per the retention schedule. Refer to *Wisconsin Human Resources Handbook, Chapter 212, "Certification Procedures"* for more information.

1. The following will display. Click **Yes** to continue.
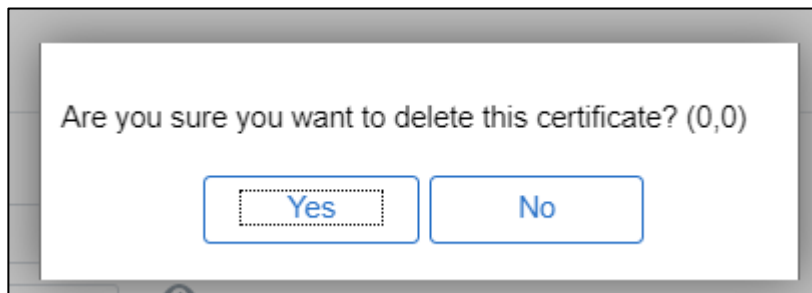
2. Once deleted the following confirmation will display. Click **OK**.
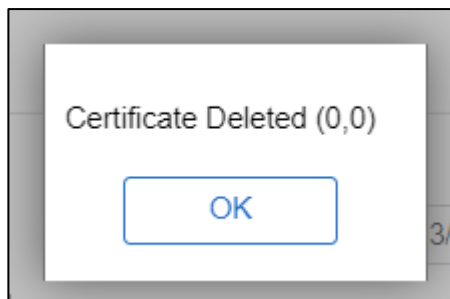
7. When you are ready to finalize the Certification, update the status to **Active**. Select **Yes** on the pop message that confirms your selection.

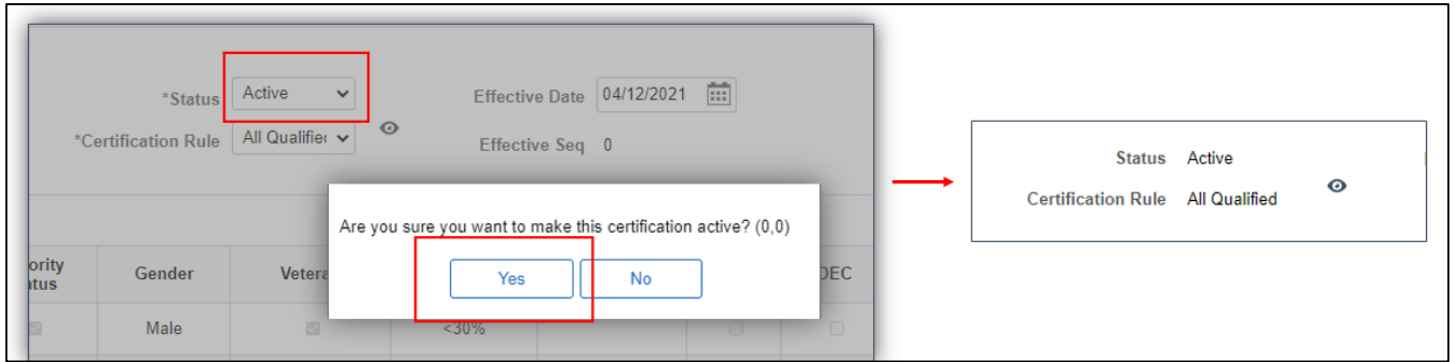The **Update ROA for Candidate(s)** button remains unavailable until the certification status is set to **Active**. You cannot enter ROAs onto a certification in Draft status.

Additional Certification Methods (Veteran and W2 Status)

To satisfy your agency's Veteran and W2 hiring plans, you may choose to use additional certification methods. If there are eligible Veteran or W2 candidates on the register, you can select either additional certification methods to create a cert of only those candidates. If there are enough eligible candidates to meet the certification rule, you may choose to initially create a certification using only the additional certification methods. Refer to *Wisconsin Human Resources Handbook*, Chapter 212, "Certification Procedures" for more information.

Follow Steps 1 through 4c in the Creating a Certification section.

1. If using veteran status, select the applicable option under **Veteran Status**.
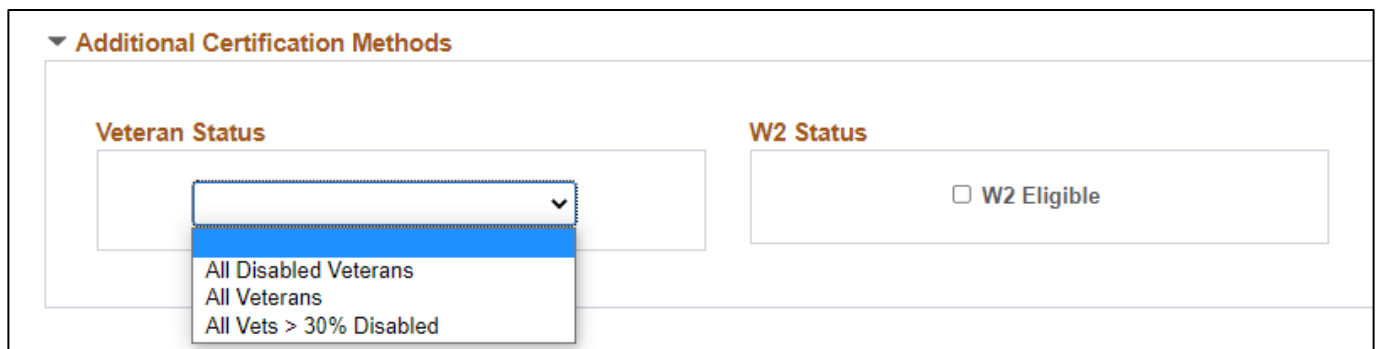
2. If using W2 status, select W2 Eligible under **W2 Status**. This will create a cert list with only W2 participants on it.

Continue with Steps 4d through 7 in the Creating a Certification section.

Creating Multiple Certifications

You may want to create multiple certification lists from a register. For instance, if the recruitment had multiple locations, you may want to create a cert list for each location if there will be separate post-cert screening processes (e.g., there will be separate interview panels for the locations, and you want to be able to manage each separately). If you have multiple certification criteria (e.g., location, Full Time/Part Time, Employment Questions, etc.), you may want to have separate lists for each of the criteria for ease of tracking type of hire made.

If creating multiple certifications from a register, you will click the **Create Certification** button from the Register page and select the applicable criteria to create the different certifications.

If the cert criteria selected matches another active cert list within the job opening/recruitment, the system will use the same cert number, increase the sequence number, and inactivate the previous version.

If the cert criteria selected is different than any active cert list within the job opening/recruitment, the system will create a new cert number. No certs will be inactivated.

If you have more than 1 certification, you can click on the **Filter** button on the certification to view a list of the available certifications.

A list of certifications will populate with the certification criteria so you can select the certification that you want to view by clicking the arrow under **Go**.

Filter Certifications					✕

| | | | | 1-2 of 2 ⌄ | | | View All |

Certification ID		Created By	Date Created	Go
1160-0001-000149	Certificate Criteria:, Location: Milwaukee	ZIMMNXADI	05/04/2021	▶
1160-0001-000148	Certificate Criteria:, Location: Madison	ZIMMNXADI	05/04/2021	▶

Return

Rescinding a Certification

Once a certification is in Active status, if the requirements are met to rescind a certification, you can do the following. Refer to *Wisconsin Human Resources Handbook*, Chapter 212.160 "Certification Procedures - Canceling or Rescinding Certifications" for statutory reasons to rescind.

1. From the **Certifications** tab, update the Certification Status from **Active** to **Rescind**.

*Status Active ⌄

Active
Close
Rescind

*Certification Rule 👁

2. The following will display. Click **Yes**.

Are you sure you want to change this certification's status? (0,0)

Yes   No

3. Select the applicable reason for rescinding the certification and click **Ok**.

4. The certification status will be updated to **Rescind**.

5. To create a new certification, go back to the **Register** tab and click **Create Certification**.

   If you create another certification list using the same cert criteria as the rescinded certification the status on the rescinded cert will change to Inactive instead of Rescinded. This will be corrected in the future. Make sure to keep track of your rescinded certification lists within the recruitment file until this is fixed.

   If you create another certification using different cert criteria the status of the rescinded cert will remain Rescinded.

Get More Names for Certification

For continuous recruitments or other recruitments in which a certification was created but additional applicants are now on the register, or you simply want to get more names on an existing cert list and the register hasn't been exhausted yet, the Get More Names button will add additional eligible applicants to the certification (provided there are spots open on the certification and you have not met your cert rule).

There are several steps in the "Get More Names" process that must be done in the following order:

1. Start with the cert in "Active" status. Change to "Active" if it is not.
2. Update the ROAs of applicants on the certification to determine if any are replaceable
3. Re-run all applicable screenings
4. Refresh the Register with new applicants
5. Use **Get More Names** to add more applicants to the Certification
   OR
1. Increase the cert rule
2. Use Get More Names to add more applicants to the Certification

Below is detailed information about the above steps.

1. You must first enter ROAs for any replaceable applicants.

   a. Check the box next to the Applicant and clicking **Update ROA for Candidate(s)**.

b. Select the applicable ROA and enter a Comment if applicable. Click **Save**.

c. If any of the following ROAs are selected, the candidate is replaceable:

    i. Not Interested

    ii. Declined Offer

    iii. Failed to Respond

    iv. Failed to Show

    v. Not Available

    vi. Not Eligible

    vii. Removed

    viii. Unable to Locate

d. Depending on which ROA is selected, the applicant may also be inactivated on the register. For example, if **Failed to Show** is selected, the registrant will also be inactivated on the Register (Status = Inactive).

    i. The following ROAs inactivate the applicant on the register:

        1. Failed to Show

        2. Removed

        3. Unable to Locate

e. The ROA for the applicant will be updated and if replaceable, a checkbox will appear in the **Replaceable** column on the Certification.

2. Once the ROAs are updated, re-run any applicable screenings for the new applicants.

3. Once applicable screenings are re-run, refresh the register (see the Refresh Register section of the Registers job aid for detailed steps).

| Applicant Screening | Register | Certifications | Activity & Attachments | Details |

Creation Date 07/15/2021
Expiration Date 01/15/2022
Registrants

Job Code 66500 CORR OFFICER
Screening Level 1-Manual Screening

Actions
Import Register | Refresh Register | Create Certification | Sa

4. Once the register has been refreshed, go to the **Certifications** tab and go to the Certification in which you want to get more names. Click **Get More Names** on the bottom of the page.

Select All   Un-select All

Actions

Update ROA for Candidate(s)   Get More Names   Email Candidate(s)

5. The following will display. Click **Yes.**

Are you sure you want get more names? (0,0)

Yes   No

6. A draft certification will be created using the same certification logic of the original certification and any replaceable applicants will be replaced.

Date Created   06/24/2021
1 of 2

*Status   Draft
*Certification Rule   Basic-030

Effective Date   08/05/2021
Effective Seq   0

Delete
Export Certification List

7. Review and update the Status of the Certification to **Active** as applicable. This will automatically inactivate the previous version of the cert.

Certification List for Hiring Managers

1. Click **Export Certification List** on the top right to download the cert list for the hiring manager.

Status Active	Effective Date 05/03/2021
Certification Rule Basic-005 👁	Effective Seq 0

Export Certification List

2. The list will download to Excel. Click on the file to open it and save a local copy.

3. Information about the job opening, as well as underutilization information is included on the output.

	A	B	C	D	E	F	G	H	I	J
1	Job Opening ID=1073									
2	Certification ID=1073-0001-000023									
3	Effdt=2021-05-03									
4	Effseq=0									
5	Underutilized Minorites=NO									
6	Underutilized for Women=NO									
7	Applicant ID	First Name	Last Name	Email	Phone	Address 1	City	State	Postal	Selected Locations
8	1907	Rob		i	917/	nna Dr	Middleton	WI	53562-1705	Madison,
9	2966	Kar		i	608/	ounty Roa	Mauston	WI	53948-8959	Madison,
10	3795	Hui			608/	layden Av	Cambridge	WI	53523-9579	Madison,
11	4218	Ma		i	715/	ncoln Roa	Mason	WI	54856-4016	Madison,
12	5943	Erir		i	608/	nant St	Portage	WI	53901	Madison,
13	11229	Sha		i	920/	narron Tra	Madison	WI	53719	Madison,
14										

Expanded Certification

All expanded certification logic is configured in the system. The expanded certification category associated with an applicant displays in the **How Certified** column of the Certification.

Certificate Criteria:, Location: Madison   Filter   Date Created 04/13/2021

1 of 1

Certification ID 1243-0001-000130	*Status Draft
Register ID 1243-0001	*Certification Rule Basic-005 👁

Effective Date 04/13/2021 📅   Delete

Effective Seq 0   Export Certification List

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	Score	Name	Minority Status	Gender	Veteran	Vet Disability Status	Spouse Veteran Status	W2	DEC	Current EE	How Certified
☐	100.000		☑	Unknown	☑	30%-70%		☑	☐	☐	Basic
☐	96.250		☑	Male	☑			☐	☐	☐	Basic
☐	96.250		☑	Unknown	☑	>70%		☑	☐	☐	Basic
☐	92.500		☑	Male	☑	30%-70%		☑	☐	☐	Basic
☐	92.500		☑	Unknown	☑	>70%		☑	☐	☐	Basic
☐	88.750		☐	Unknown	☑	>70%		☑	☐	☐	VD7
☐	85.000		☑	Male	☑	>70%		☑	☐	☐	VD7
☐	81.250		☑	Female	☑	>70%		☐	☐	☐	VD7
☐	85.000		☑	Male	☐		Disabled	☑	☐	☐	VS7

Below is a list of all Expanded Certification Definitions:

- Basic = based on basic cert rule selected, this includes ties

- VD7= veteran with at least 70% disability

- VS7 = spouse of at least 70% disabled veteran

- VTR = veteran of any status

- VTD = veteran of any disabled status

- VKA = unremarried spouse of veteran killed in action

- VDS = unremarried spouse of veteran who died of service-related disability

- DEC = disabled expanded certification

- MEC = underutilized minority

- WEC = underutilized women

- DEL = disabled eligible, requires exam waiver

Recruiters are also able to access applicant-specific expanded certification information on the W2, DEC, DEL Eligibility Page (Navigation: State of Wisconsin (STAR) > Recruiting > W2, DEC, DEL Eligibility).

Underutilization (MEC, WEC) information is available at State of Wisconsin (STAR) > Recruiting > Under-Utilization (MEC, WEC) or via the following query: WI_HRS_UNDERUTIL_WEC_MEC. In the query prompts, leaving the Checkmark boxes for Women and Minorities blank will return everything. Checking those boxes will only bring back "Yes" values.

Reviewing Expanded Certification Logic

The certification logic, including expanded certification logic, is accessible from the certification page.

1. Click on the "eye" next to the Cert Rule to see the details behind the certification.
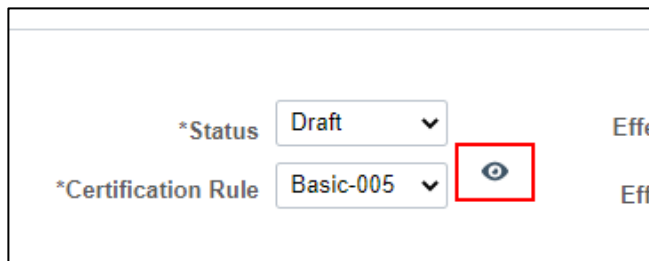
View Results of Cert Rules

Basic Rule : 5
Total Applicants on register : 25
Applicants that passed criteria : 25
Basic Applicants Added to Certificate: 5
Basic Applicants tie Added to Certificate: 0
Remaining Applicants for VD7: 20
VD7 Applicants Added to Certificate: 3
Remaining Applicants for VS7: 17
VS7 Applicants Added to Certificate: 3
Remaining Applicants for VTR: 14
VTR Applicants Added to Certificate: 3
Remaining Applicants for VTD: 11
VTD Applicants Added to Certificate: 3
Remaining Applicants for VKA: 8
VKA Applicants Added to Certificate: 2
Remaining Applicants for VDS: 6
VDS Applicants Added to Certificate: 3
Remaining Applicants for DEC: 3
DEC Applicants Added to Certificate: 0

Business Unit=25500 Jobcode=57800 Job Family=106 WEC=Y MEC=Y
Remaining Applicants for MEC: 3
MEC Applicants Added to Certificate: 2
Remaining Applicants for WEC: 1
WEC Applicants Added to Certificate: 0
Remaining Applicants for DEL: 1
DEL Applicants Added to Certificate: 0

The above is telling you the following:

- A Cert Rule of Basic 5 was used and there were 25 registrants
- 5 registrants were certified by the Basic 5 rule and there were 20 remaining registrants available to apply to the next cert rule – VD7
- There are 3 VD7 registrants who are then certified and then there are 17 remaining candidates
- This process continues through the remaining cert rules
- Then it determines if underutilized for WEC and MEC and adds registrants as applicable

Email Candidate(s)

You can send emails directly to applicants from Certification page.

1. Select the applicants that you want to contact and click the **Email Candidate(s)** button at the bottom of the page.

2. You will be brought to the **Send Correspondence** page.

3. The applicants who will receive the message will be listed at the top of the page (you can also click on the spreadsheet icon to download the list).

   a. The system will send emails up to 1000 recipients at a time. If you need to send to more than 1000 recipients, please create a JIRA ticket.

4. Leave the defaults under **Message Type and Method.**

5. Review the **Recipient information** and update as needed. Uncheck the box next to **Include Interested Parties** if that is not applicable.

a. The recipients do not see all the other recipients listed here – each recipient receives a separate email that is only sent to them.

6. Enter the **Subject** and **Message**. Please note this message is plain text but you can include links.

7. Add any applicable attachments by clicking **Add Attachment** and uploaded the document(s).

8. Click **Preview** to review your message before sending.

9. Click **Send** once you are ready to send the message.

Closing a Certification

All ROAs must be entered onto the certification prior to closing. For information about closing a certification, please see the Closing a Job Opening job aid.

Supplement from an Additional Register

If you need to supplement the certification because you exhausted the register, follow the steps below. You can only supplement the certification if the same recruiting location types are used on the job opening (e.g. city to city, county to county, etc.). As an example, if the job opening you want to supplement from uses city as a recruiting location but your job opening uses county, due to system limitations the process will not work.

1. Follow the steps in the Import a Related Register section of the Registers job aid.

2. Based on your selected certification rule, verify that applicants with replaceable ROAs have been replaced. A list of replaceable ROAs can be found in the Get More Names for Certification section.

3. Change the cert from Draft to **Active**.