

Research Faculty Hiring Job Aid: Procedural Workflow and Document Retention

Companion document: [Researcher Classification Criteria & Hiring Guidance](#)

Section 1 – Purpose, Background and Scope

Purpose

This document describes how the Researcher Classification Criteria & Hiring Guidance and Pre-Posting Checklist are applied in practice across Georgia Tech's hiring workflow. It covers when to use the research faculty hiring checklist, who is involved in the evaluation process, and where to store the documentation.

It accompanies the Researcher Hiring Guidance and Classification Criteria document, which contains the classification criteria, checklist form, and scoring matrix. This document does not duplicate that content. Rather, it provides supplemental guidance explaining how, when and where stakeholders leverage and store the checklist during the hiring process.

Background

The Researcher Hiring Guidance and Checklist were developed as a decision support aid for hiring managers, HR partners and leaders to ensure that every research faculty position posted or filled has been evaluated against objective criteria and documented prior to entering the talent acquisition workflow.

Scope

This guidance applies to all hiring pathways where research faculty classification is proposed:

- A. Posted positions in Careers/OneUSG (campus)
- B. Posted positions in PageUp (GTRI)
- C. Executive/contracted external searches; Non-Competitive Appointments (limited-term/direct appointments)

Section 2 – Workflow Pathways by Hiring Type

The classification decision occurs before a job opening/requisition is created (for competitive hires), or before a GT-TRACS appointment package (for external searches and non-competitive hires) is submitted. The checklist is required and applies to all research faculty hires regardless of the recruitment process; what differs is when and where the checklist is submitted and retained, as outlined below:

Pathway A – Posted Positions in Careers/OneUSG

This is the primary hiring pathway for research faculty in academic units.

Before a position number is requested:

The hiring manager identifies a need and works with unit-level HR to determine whether the role qualifies as research faculty. Together they complete the Pre-Posting Checklist. The unit HR partner co-signs.

Step 1: Position Number Request (if applicable)

Hiring manager or unit HR requests a new position number or reuses an existing one tied to a research faculty job code. No system action is required for the checklist at this step. The checklist has been completed but will be attached in Step 2.

Step 2: Job Opening Creation

The initiator creates a job opening request using the position number. The job opening includes the job description and required qualifications. This transaction routes through approval levels in Careers/OneUSG:

Initiator: Hiring manager or unit HR creates the job opening request; **in the Justification Statement field on the Job Details tab the initiator must confirm that the checklist is complete and provide a 1-2 sentence summary of how the role meets the Research Faculty criteria.**

Background Check Package ?

Profile ID	Background Check Package	Effective Date
0	Standard Enhanced	12/11/2025

Add Background Check Package

Justification Statement ?

There are no items for the Justification Statement section. Please add one if required.

Add Justification Statement

Onboarding Packet ?

Profile ID	Onboarding Packet	Effective Date
0	Employee	12/11/2025

Add Onboarding Packet

- **Level 1:** Unit or college-level HR
- **Level 4:** Office of Faculty Affairs
- **Level 5:** ASC Talent Acquisition

Once the job opening is approved and posted, the initiator must return to the Job Opening and attach the completed checklist file, and the scoring matrix, if applicable, under Activity & Attachments>Attachments.

At Hire:

When a candidate is selected and the hire is processed, the checklist and scoring matrix, if applicable, must also be uploaded to the employee's GT-TRACS record as part of the appointment package. This ensures that the classification rationale is stored alongside other supporting documentation for the employee's offer.

Pathway B – Posted Positions in PageUp (GTRI)

GTRI posts research faculty positions using established working titles and levels. GTRI positions are posted through PageUp, and requisition tickets are managed through Jira.

PVA:

The hiring manager identifies a need and submits a PVA for a research faculty position and working title. GTRI hiring managers select from predefined working titles with associated job descriptions. The hiring manager completes the Pre-Posting Checklist with their recruiter during the Intake Meeting.

Where the checklist is stored:

The checklist can also be attached to the initial Jira requisition ticket for recruiter visibility, then the completed, signed checklist must be attached to the PVA in PageUp.

The checklist should be attached to the Jira ticket before the PVA routes to the recruiting team. This ensures that the GTRI's internal faculty affairs support team can verify the classification documentation before the position is posted.

At Hire:

The checklist documentation must be uploaded to GT-TRACS as part of the new appointment package. The checklist should also be retained in the PageUp record associated with the PVA.

Pathway C – Executive Searches, Limited-Term Appointments, Part-Time Appointments, and other Non-Competitive Selections

Executive searches for research faculty positions are conducted by contracted external search firms. These searches are typically not posted to Careers or PageUp.

USG policy allows **limited-term faculty** appointments for one year without competitive search; these appointments may be extended up to one additional year. Limited-term faculty hired without a search are considered a non-competitive selection.

Direct appointments are defined as “the regular appointment of a person, where the normal advertising and competitive selection process is not applied, and Institutional business needs support this approach for an appointee whose unique skills and qualifications are documented.”

Limited-term researcher appointments and any other direct appointments, by nature, do not include a job posting, but the “Pre-Posting Checklist” is required, as well as the scoring matrix, if applicable, at the time of hire.

When to complete the checklist:

The hiring manager, in coordination with unit HR, must complete the Pre-Posting Checklist before the new hire package is submitted to GT-TRACS for OFA review and approval. Even though the position is/was not posted, the classification determination must still be supported through documentation such as a position description that includes a job summary, minimum requirements and responsibilities of the role. This documentation should be included in the GT-TRACS appointment package.

For executive searches, the hiring manager, in coordination with unit and division-level HR, must complete the Pre-Posting Checklist before the external search firm begins contacting candidates.

Where the Checklist is stored:

The signed checklist is uploaded to GT-TRACS as part of the new appointment package.

Section 3 – Document Retention Summary

Pathway	Primary checklist storage	Secondary storage	When uploaded	Responsible party for document retention
A: Careers/OneUSG (campus)	Attached to job opening in Careers	GT-TRACS (appointment package)	Note confirming completion at the time a job opening is submitted; file uploaded to “Attachments” after job opening is approved and posted; GT-TRACS appointment package at hire	Initiator uploads to Careers; unit HR partner ensures GT-TRACS copy
B: PageUp (GTRI)	Attached to PVA in PageUp	GT-TRACS (appointment package)	At the time PVA is requested; GT-TRACS copy at hire	Initiator uploads to PageUp; RFA ensures GT-TRACS copy
C: Limited-Term/Executive search/ Direct hire	GT-TRACS (appointment package)		GT-TRACS new appointment package at the time of selection; before search firm engagement	Unit/Division HR

Section 4 – Roles and Responsibilities

Role	Responsibility
Hiring Manager	Identifies position need. Determines whether the role's primary function is research or support. Completes the checklist with support from the unit HR partner, as appropriate. Attaches job description. Co-signs the checklist. Uploads the checklist to the appropriate system, if applicable.
Unit HR Partner / Leader/Recruiter	Reviews the checklist with the hiring manager. Provides guidance on classification criteria. Co-signs the checklist. Ensures GT-TRACS copy is retained at hire. Uploads the checklist to the appropriate system, if applicable (Careers, PageUp, and/or GT-TRACS depending on pathway and unit business processes)

Office of Faculty Affairs (OFA)	Reviews all RI/Campus checklist submissions. Maintains the checklist, scoring matrix, and Hiring Guidance in coordination with EVPR/VPF.
EVPR /VPF	Maintains the rubric, scoring matrix, and Hiring Guidance in coordination with OFA.
GTRI sHRp / RFA	Reviews GTRI checklist submissions through GTRI's internal faculty affairs function. Coordinates with OFA on GTRI classification questions. Manages GTRI-specific documentation in PageUp and GT-TRACS.

Section 5

Escalation and Dispute Resolution

When a Classification Is Not Supported

If OFA or GTRI RFA/Sr. HR Director (GTRI) determines that a position does not meet research faculty criteria, the position cannot be posted as research faculty. The hiring manager has two options:

- **Option A:** Revise classification to staff and proceed.
The hiring manager works with the unit HR partner and GTHR Compensation and Classification to identify the appropriate staff classification, job family, and JCCS title. Once confirmed, the requisition proceeds through the standard staff hiring process. No additional OFA review is required.
- **Option B:** Revise and resubmit.
The hiring manager may revise the checklist, update the job description, and resubmit with a written explanation of what responsibilities have been expanded upon or clarified to accurately reflect research faculty requirements. The reviewing body (OFA or GTRI RFA) evaluates the resubmission under the same criteria.

Positions may not be posted while classification is under review. In the event a position is posted without required documentation, the search must be paused and the checklist process completed before recruitment can resume.

Informal Resolution

When a hiring manager or unit HR/leadership disagrees with a classification decision, the first step is informal resolution. The hiring manager and unit HR partner may request a meeting with OFA (campus) or the GTRI Sr. HR Director (GTRI) to discuss the scoring results and the basis for the determination.

Most disagreements should be resolved at this stage through clarification, additional documentation, or revision of the checklist.

Formal Escalation to EVPR

If informal resolution does not result in agreement, the hiring manager may submit a written request for executive review to the Office of the Executive Vice President for Research. The request should include the completed checklist, scoring matrix (if applicable), job description, and a written summary of any discourse and key information pertinent to the classification determination.

The EVPR reviews the case with appropriate advisory input and makes the final binding determination. The EVPR's determination and its rationale are documented and filed with both OFA and the hiring unit.

For GTRI cases, the escalation path runs through the GTRI Director before reaching the EVPR, consistent with GTRI's internal governance structure.