UAB PeopleAdmin Viewing and Managing Applicants User Guide

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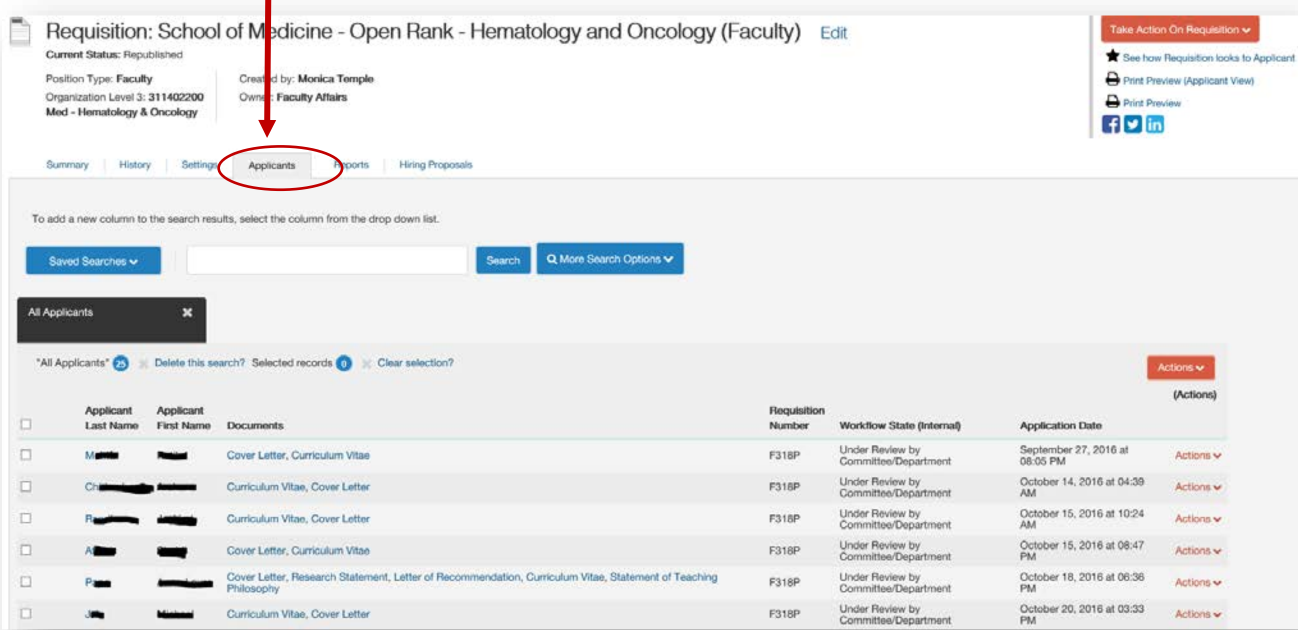
Reviewing Applicants

To see who has applied to a requisition

1. **Select Faculty** from the Requisitions Tab on the Homepage;
2. Locate and open the requisition that you wish to review applicants on;
3. Open the **Applicants** tab to open and view the list of applicants.



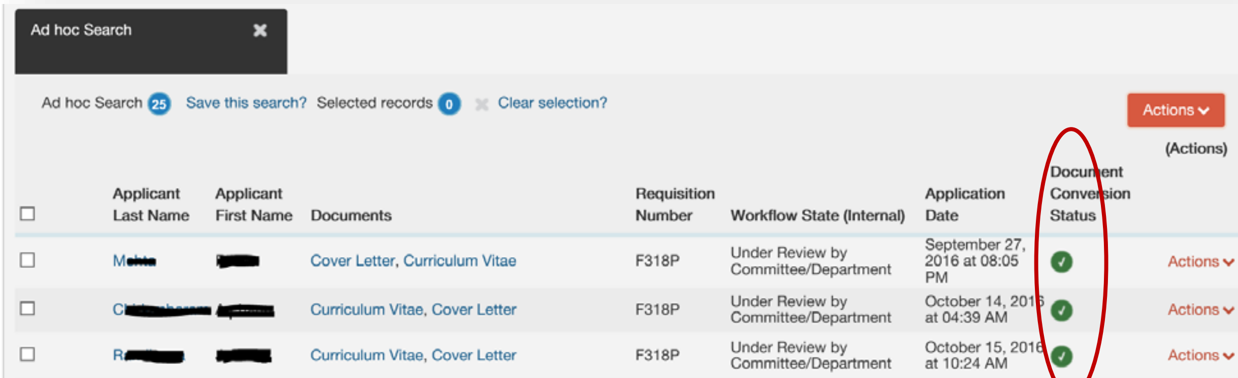
To view applicants and their materials, you have several options.

- You can view the application data individually by clicking on the applicant name.
- To view one or multiple applicants and their documents you will have to the option to select the checkbox beside the name of the applicants.

To view an application

1. In the search area of the requisition applicants list, add the "**Document Conversion Status**" column to this search view to see whether any applicants have submitted documents that did not convert properly to PDF.

If the applicants’ documents converted to PDF properly, this is how the applicants’ screen will appear.



Ad hoc Search

Ad hoc Search 25 Save this search? Selected records 0 Clear selection?

Actions

	Applicant Last Name	Applicant First Name	Documents	Requisition Number	Workflow State (Internal)	Application Date	Document Conversion Status	(Actions)
☐	M[redacted]	[redacted]	Cover Letter, Curriculum Vitae	F318P	Under Review by Committee/Department	September 27, 2016 at 08:05 PM	✓	Actions
☐	C[redacted]	[redacted]	Curriculum Vitae, Cover Letter	F318P	Under Review by Committee/Department	October 14, 2016 at 04:39 AM	✓	Actions
☐	R[redacted]	[redacted]	Curriculum Vitae, Cover Letter	F318P	Under Review by Committee/Department	October 15, 2016 at 10:24 AM	✓	Actions

If an applicant uploads a document that fails to convert to PDF, the application will need to be reactivated so the applicant can provide a new document. See Helping Users and Applicants in the Online Help for instructions.

To view applicant documents one at a time

2. Locate the applicant of interest from the complete list of applicants on the requisition. Select the document of interest.

☐	Kondepudi	Divya	Cover Letter, Letter of Recommendation, Curriculum Vitae
☐	Ross	Diana	Cover Letter, Letter of Recommendation, Curriculum Vitae
☐	Perez-Lee	Ayotunde	Cover Letter, Letter of Recommendation, Curriculum Vitae
☐	Cobbleberry	Finnius	Cover Letter, Curriculum Vitae, Letter of Recommendation

To view one applicant's application materials together

1. If the list of applicants does not include the **Combined Documents Column**, select **More Search Options** and add it from the **Add Column List**. The list of applicants refreshes.

2. For the applicant of interest, select **Generate** or **View** in the Combined Document column, depending on which is available. **Generate** creates an up-to-date PDF. **View** presents the PDF of the applicant's most recent application materials in a new tab of your browser.

☐	[redacted]	[redacted]	Curriculum Vitae, Cover Letter, Letter of Recommendation	F318P	Under Review by Committee/Department	January 20, 2017 at 01:49 PM	✓	Generate	Actions
☐	[redacted]	[redacted]	Cover Letter, Curriculum Vitae	F318P	Hired	January 22, 2017 at 11:46 PM	✓	View	Actions
☐	[redacted]	[redacted]	Cover Letter, Curriculum Vitae	F318P	Hired	March 02, 2017 at 09:34 PM	✓	View	Actions

3. Under the **Actions option**, select View Application beside the person that you want to view.
4. When viewing an application, you will see **View Application under the General Actions**. [Instructions for viewing multiple applicants or applicants in bulk follows].
5. **Scroll to the bottom of the screen to view PDF Document Types.** You can either view/download each document type individually or the application and attached documents at the same time. You will need a .pdf reader installed to be able to view, save, and print.

Note: If selected to generate a .pdf with all of the documents please make sure to select Recreate PDF each time so that the most recent information will be downloaded.

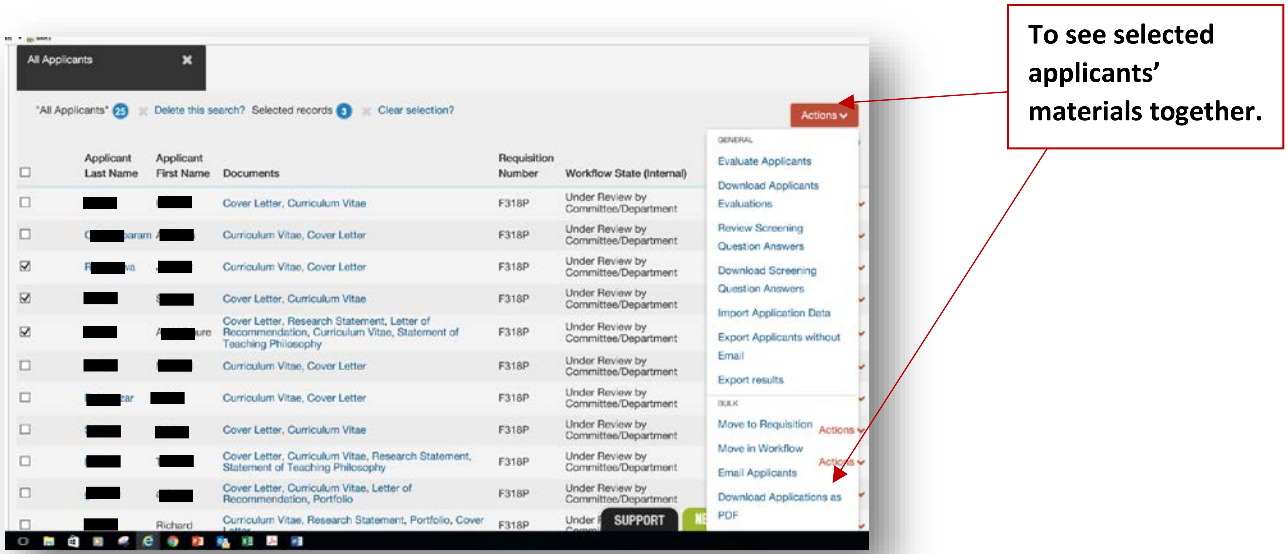
Document Type	Actions
Application	View
Combined Document	Generate

To view a collection of applicant documents

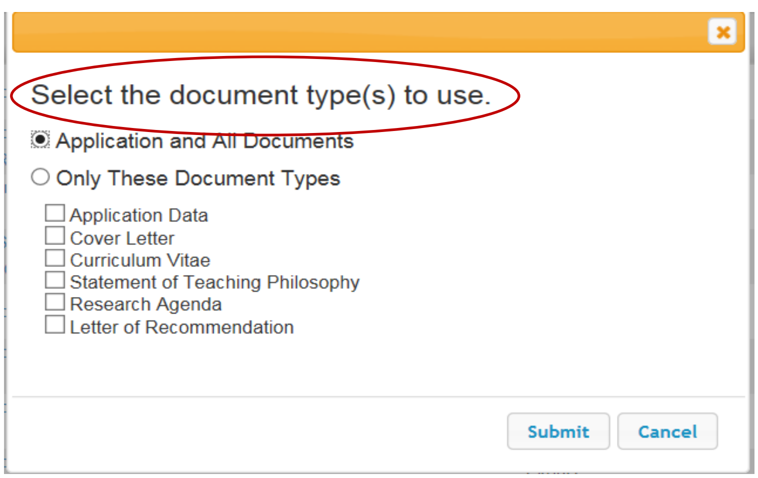
You can review more than one applicant document at a time. **You may choose to view all the documents for an applicant**, specific applicant documents for each of a group of applicants, or all applicant documents for a group of applicants.

1. On the requisition's **Applicants** tab, check the boxes to select the applicant or applicants of interest.

2. See the selected applicants' materials together: From the **Actions** menu, select **Download Applications as PDF**.



In the dialog box, select the types of documents you want to view; then select **Submit**.

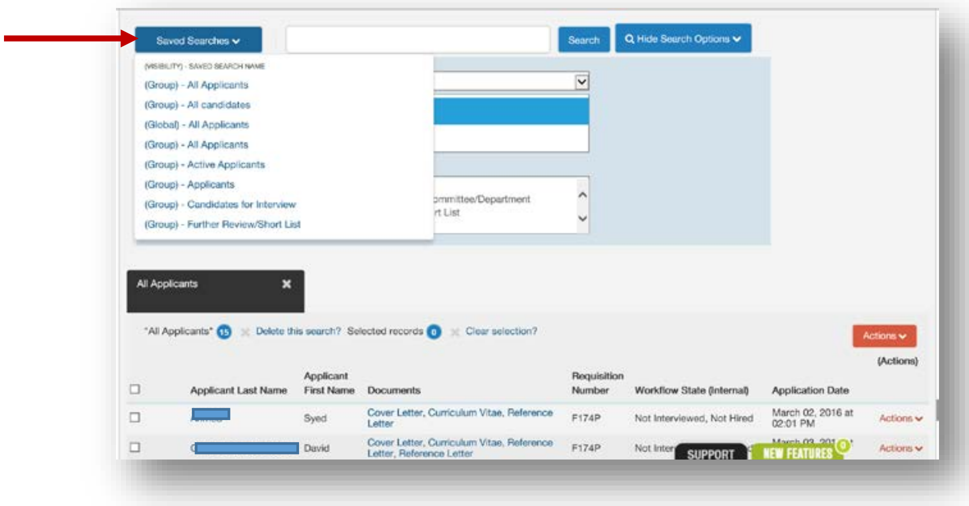


Exporting Applicant Information

This will download your current search view into an Excel spreadsheet.

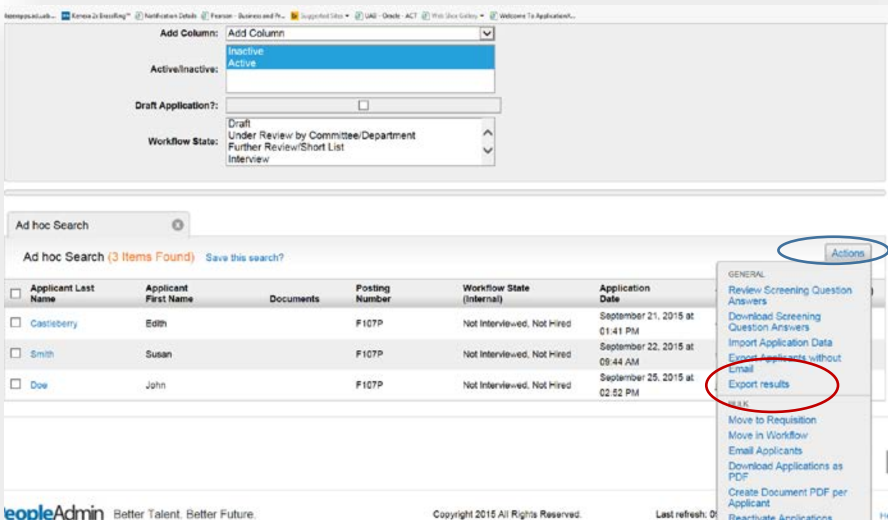
Using the export feature is a good way to extract applicant information such as name, address, phone number, email address, etc. when needing to contact the applicants (such as requesting more information) or help with creating the screening matrix. When exporting the information, the system will export all applicants and the information on the search grid and place it in an Excel spreadsheet.

1. Find the requisition and click on the **Applicants** tab.
2. Click on **Saved Searches** beside the search field and select **applicants based on your previously saved searches (i.e. Further Review/Short List)**

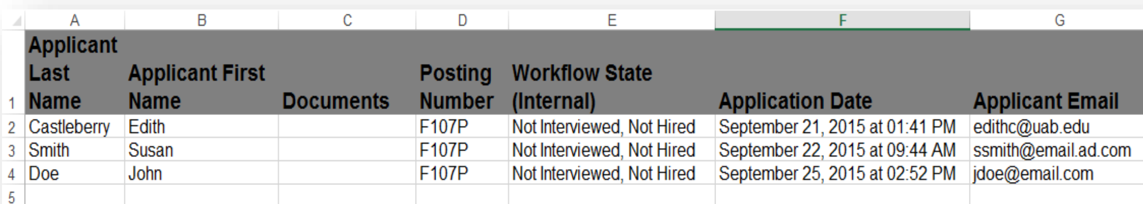


3. If needed, click on **More Search Options** then select the **Add Column** drop down list and chose additional fields that you want to add to the search grid. You will need to select one field at a time. (Ex: Phone, Email Address). There may be more than one field with the same name so you might have to add and/or remove columns to make sure that correct column is added.

4. Click on the **Actions** button and select **Export Results.**



5. The results on the search grid will be downloaded into an Excel spreadsheet from the browser.



Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date	Applicant Email
Castleberry	Edith		F107P	Not Interviewed, Not Hired	September 21, 2015 at 01:41 PM	edithc@uab.edu
Smith	Susan		F107P	Not Interviewed, Not Hired	September 22, 2015 at 09:44 AM	ssmith@email.ad.com
Doe	John		F107P	Not Interviewed, Not Hired	September 25, 2015 at 02:52 PM	jdoe@email.com

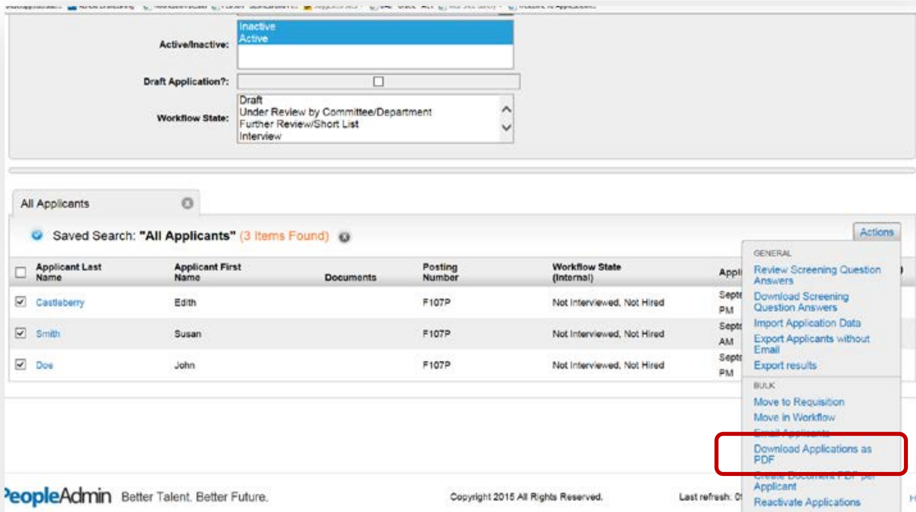
Downloading Multiple Applications

Download Applications as PDF-Will download all selected applicant application and documents into PDF View.

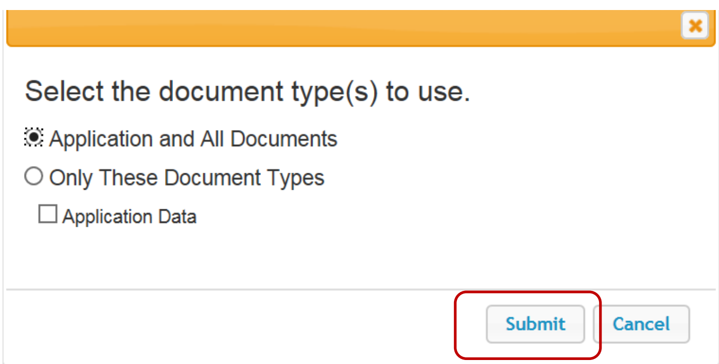
To download applications and/or documents for more than one applicant you can perform a **BULK ACTION**:

1. Place a checkmark beside the applicants' names.

2. From the Actions option, select **Download Applications as PDF.**



3. Select the documents to download and **click on Submit**.

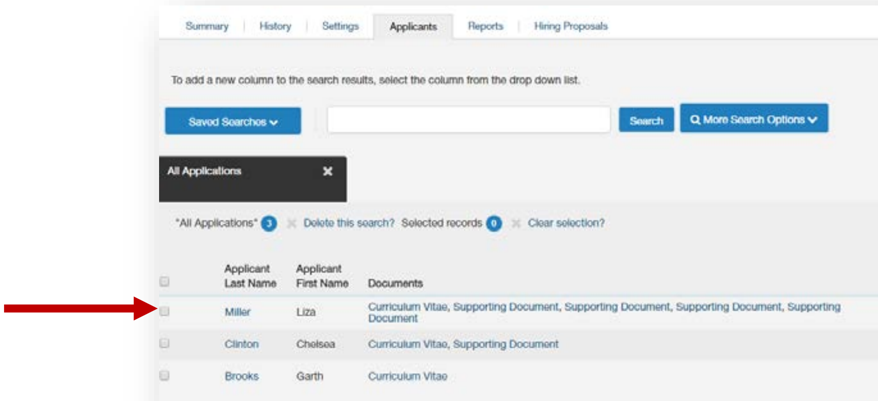


4. A dialog box will appear while the system is generating the file then the .pdf file will either appear in the browser or will ask you to download it.

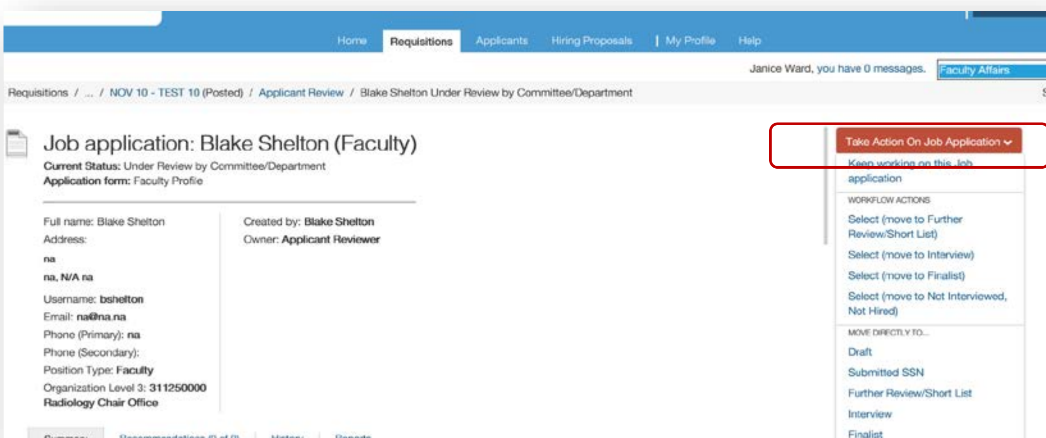
Changing the Status of Applicants

Managing Individual Applicants

1. To move one candidate/applicant in the workflow, click the Applicant's Last Name—in blue. This opens the candidates' job application.



2. Hover over the over the "TAKE ACTION ON JOB APPLICATION" button, and click on the desired workflow state (for example, INTERVIEW).

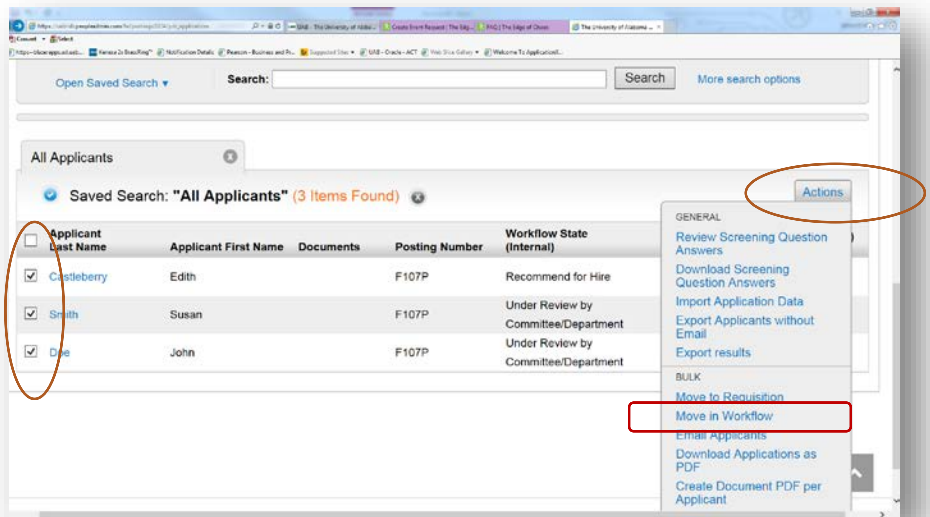


3. You will see TAKE ACTION DIALOG BOX. Click submit.

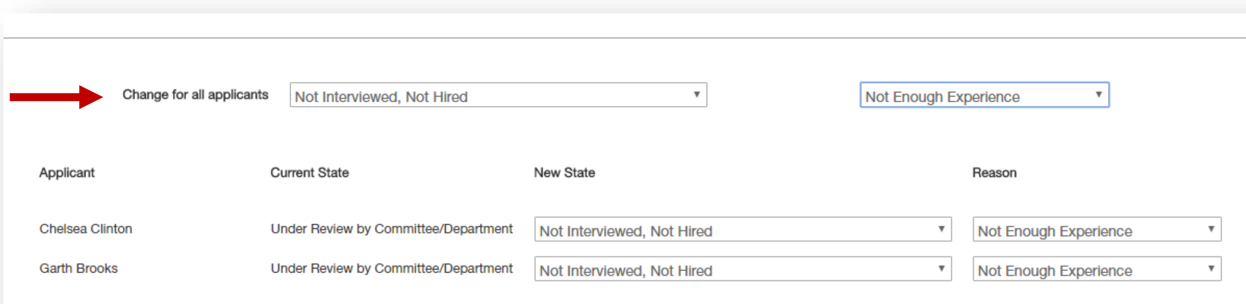
Changing the Status of Multiple Applicants

To move a group of applicants to a new workflow state

1. From the **list of all applicants on the requisition**, check the boxes associated with the applicants of interest.
2. From the **Actions** menu, select **Move in Workflow**. The Editing Workflow States page opens.



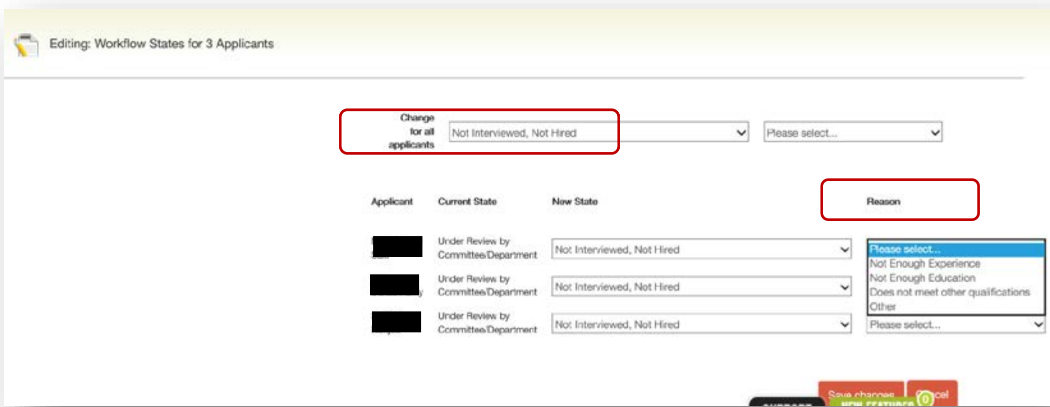
3. The next screen should allow the Search Chair/Hiring Manager to select a workflow state from the **CHANGE FOR ALL APPLICANTS** dropdown.



Note: If applicants are at different current states, the statuses cannot be changed all at once.

5. ***If required***, select the reason that best explains why you are moving the applicants in the workflow. You can select a reason for each applicant even if you moved all of them in the workflow together.
6. When you have moved all applicants to the appropriate workflow states, select **Save Changes** to update them.

Note: For any applicant changed to a ***Not Interviewed, Not Hired or Interviewed, Not Hired*** *status, you must select a* ***Reason*** *from the list provided.*



Once a position is posted, applicant materials will begin to be posted to UAB Faculty Jobs as candidates apply. Although interviews occur outside of UAB Faculty Jobs, this system should be used by search committees to review applicant materials, rank candidates and change the status of applicants.

Faculty applicants will be able to log back into UAB Faculty Jobs to see the status of their application. They also may receive emails from the system regarding certain status updates. Once an applicant submits the application, the applicant will not be able to edit or make changes, including uploading any additional documentation. Any changes to these submissions are discouraged and can only be done before the posting has closed. In rare instances where an applicant may request to edit or update their application, **please contact Faculty Affairs**.

Note: Applicants will see a status of "**In Progress**" until the position is filled or the posting/requisition is canceled.

7. After conducting interviews, change applicant status for interviewed candidates:

   "Interviewed, Not Hired," "**Further Review/Short List"**

   "Interview," "**Finalist"** or "**Recommend for Hire**" (for the successful candidate)

Please note: an automated email will be immediately sent to applicants whom you move to Not Interviewed, Not Hired workflow state.

Failed or Canceled Searches

In the event a requisition is determined to be a failed search or will be canceled, the search committee chair or hiring manager will move all active applicants to the POSITION NOT FILLED workflow state.

Faculty Affairs will move the Requisition to Canceled (Failed Search).

NOTE: Contact Faculty Affairs for additional information regarding failed or canceled searches.

Dispositioning Applicants

At the end of the search, all applicants should be appropriately disposition—moved to final workflow state in UAB PeopleAdmin.

Select the appropriate workflow state for each applicant individually, or use the *Change for all applicants'* option at the top of the page to modify the group as a whole. Please see pages 9 and 10 of this guide for detailed instructions on ***Changing the Status of Multiple Applicants***.

Faculty Affairs will close the job posting/requisition if there are no other open positions on the requisition.

If you are filling multiple faculty positions from one requisition, please contact Faculty Affairs for additional information.

Reviewing Screening/Supplemental Questions and Evaluative Criteria

(Skip this section if your requisition does not include evaluation questions or Supplemental/Screening Questions).

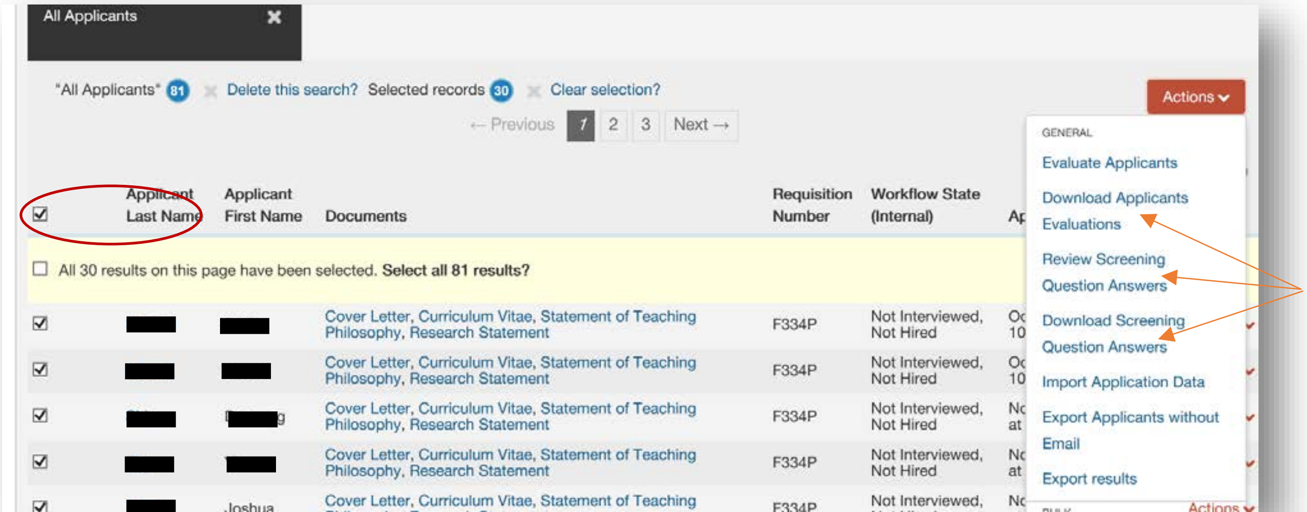
Screening/Supplemental Questions

The answers to the supplemental questions can provide information directly from your applicants regarding their knowledge, skills, and abilities to meet the requirements of your position. This information is displayed in graph format and also on the Screening Search under "Supplemental Questions Score."

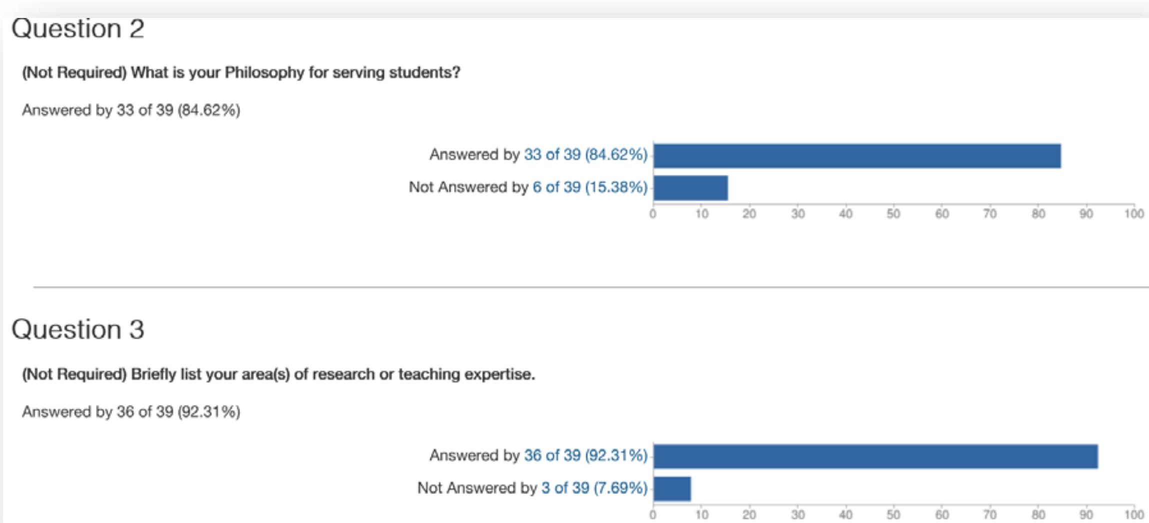
Search answers will show you the question and the possible answers to the question. You have the option to include and exclude certain answers.

Download Screening Questions Answers will allow you to export the supplemental questions into an Excel Spreadsheet.

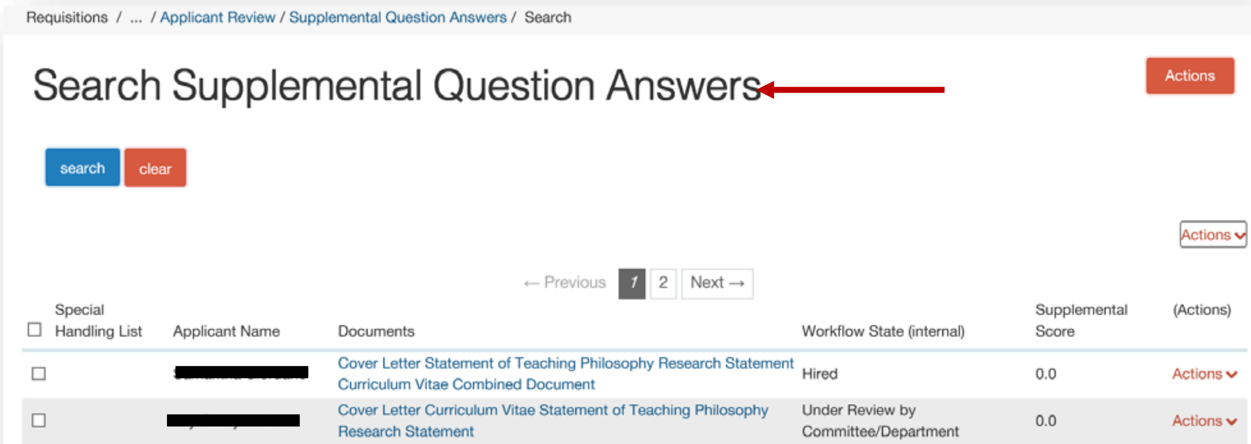
1. From the Requisition/Posting, click on the APPLICANTS tab to see a full list of candidates.
2. If you would like to review the Supplemental/Screening Questions for all candidates, check the box beside "APPLICANT LAST NAME" to select all.



You can see a summary of the Supplemental/Screening answers in a graph format and on the Screening Search under "Search Supplemental Question Answers."



Choose this option if scores were assigned to Supplemental/Screening Questions.



<u>Reviewing Applicant/Candidate Evaluations</u>

UAB PeopleAdmin allows faculty search committees to evaluate faculty applicants/candidates right in the system. The evaluation criterion is set-up (established) during the requisition process.

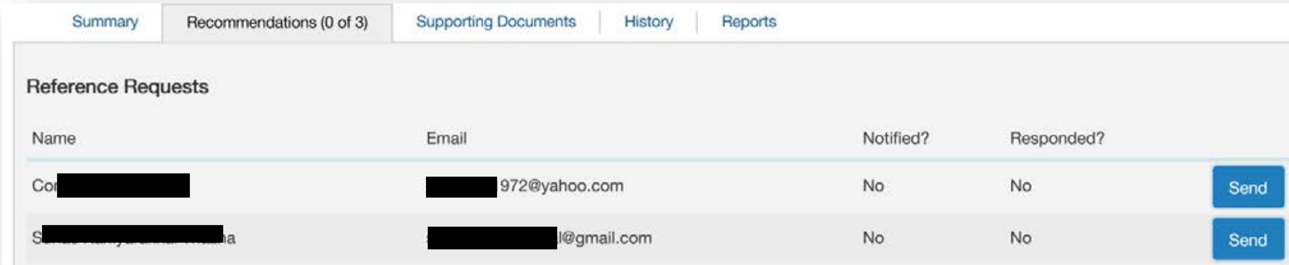
To view Applicant/Candidate Evaluations, use the steps detailed above (for screening/supplemental questions), but select DOWNLOAD APPLICANTS EVALUATIONS option under the ACTIONS menu.

Reviewing References for an Applicant

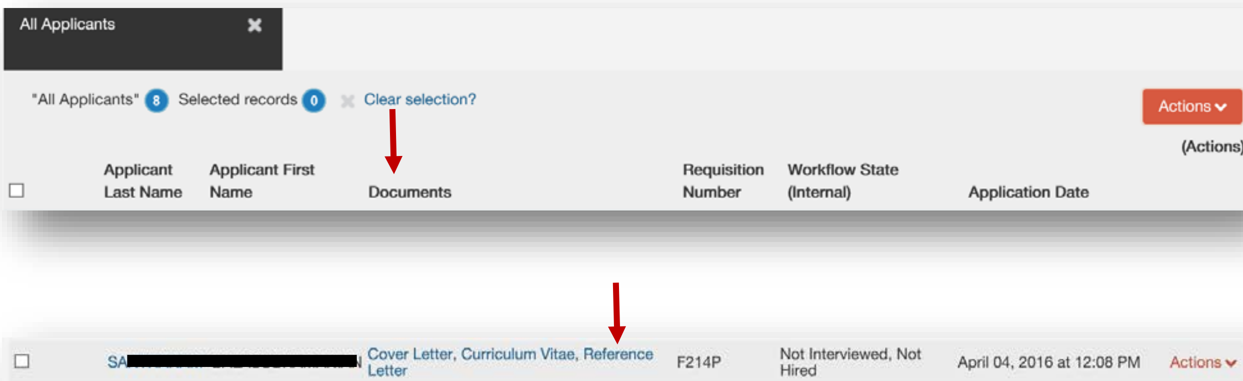
After the applicants recommendations have been sent back or uploaded to your requisition in UAB PeopleAdmin, you are able to review the provided information. To do this:

1. Navigate to the requisition and click on the Applicants tab. Click the appropriate applicant's last name.
2. While viewing the Applicant information will you see five tabs: Summary, Recommendations followed by 2 numbers (example 1 of 1), Supporting Documents, History, and Reports. **Click the Recommendations tab.**
3. You will see **Reference Requests** showing if an email has been sent out to a reference. **Manual Notifications**: If notifications were not set up to auto send (at a specific workflow state), they can be sent manually from this area.

4. Reminder Emails can also be sent from this page by clicking resend.



5. You can also view Letters of Recommendation from the Reference Provider by clicking on blue link for "Reference Letter" under the documents tab on the Applicant Review Screen.



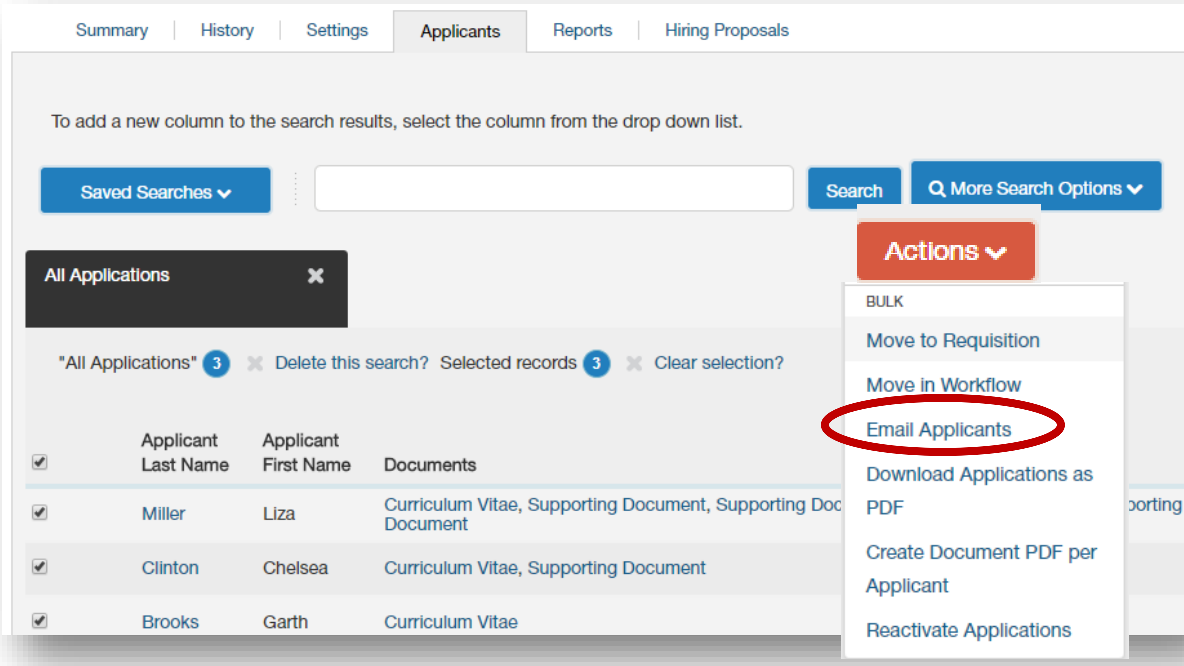
Sending Email Messages to Applicants

Search Chair/Hiring Manager Users can send various system emails to candidates as they conduct the interview, review and selection process.

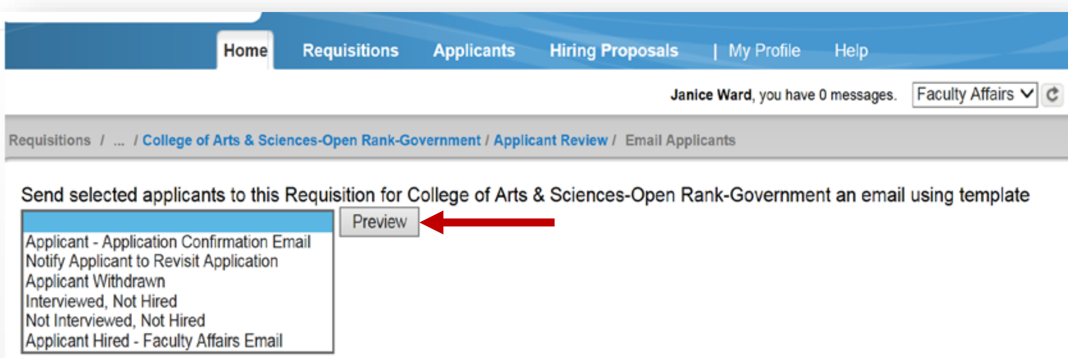
You can email applicants using these templates using the following steps:

1. Select all applicants you would like the email to go to by checking the box beside their names.

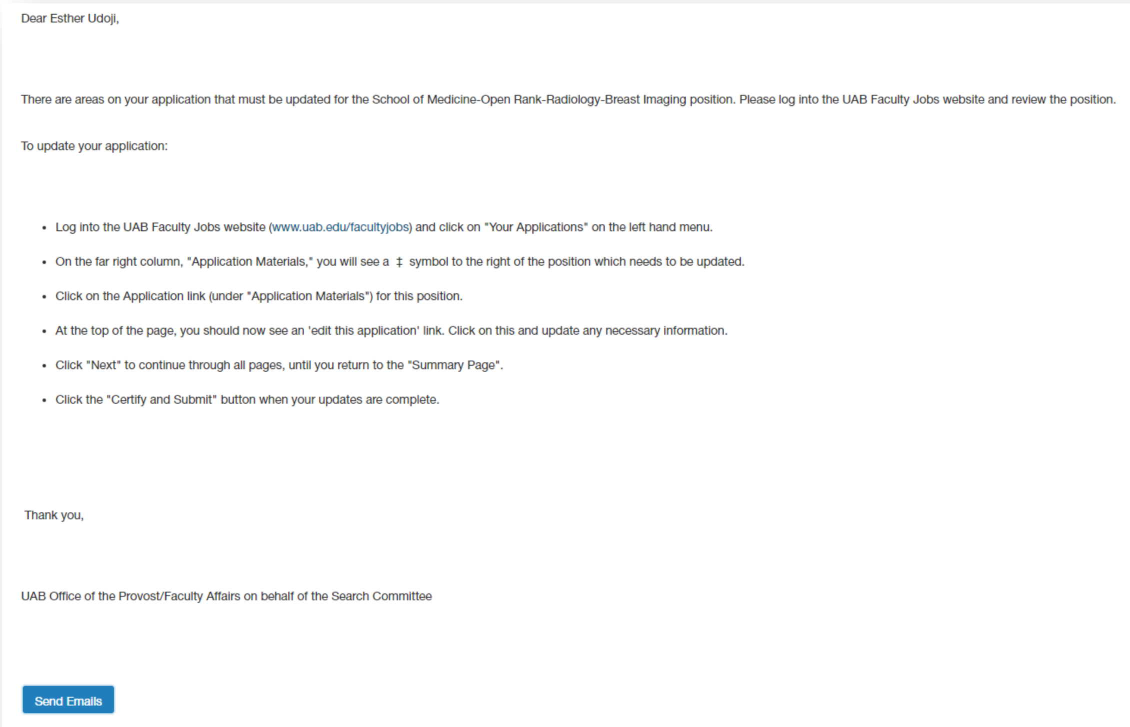
2. Hover over "ACTIONS" and click "Email Applicants" under Bulk.



3. Select the **Email Template** that you wish to use; then click **PREVIEW**.



4. If you are satisfied with the email as shown in the Preview Screen, **click SEND EMAILS.**



Dear Esther Udoji,

There are areas on your application that must be updated for the School of Medicine-Open Rank-Radiology-Breast Imaging position. Please log into the UAB Faculty Jobs website and review the position.

To update your application:

- Log into the UAB Faculty Jobs website (www.uab.edu/facultyjobs) and click on "Your Applications" on the left hand menu.
- On the far right column, "Application Materials," you will see a ‡ symbol to the right of the position which needs to be updated.
- Click on the Application link (under "Application Materials") for this position.
- At the top of the page, you should now see an 'edit this application' link. Click on this and update any necessary information.
- Click "Next" to continue through all pages, until you return to the "Summary Page".
- Click the "Certify and Submit" button when your updates are complete.

Thank you,

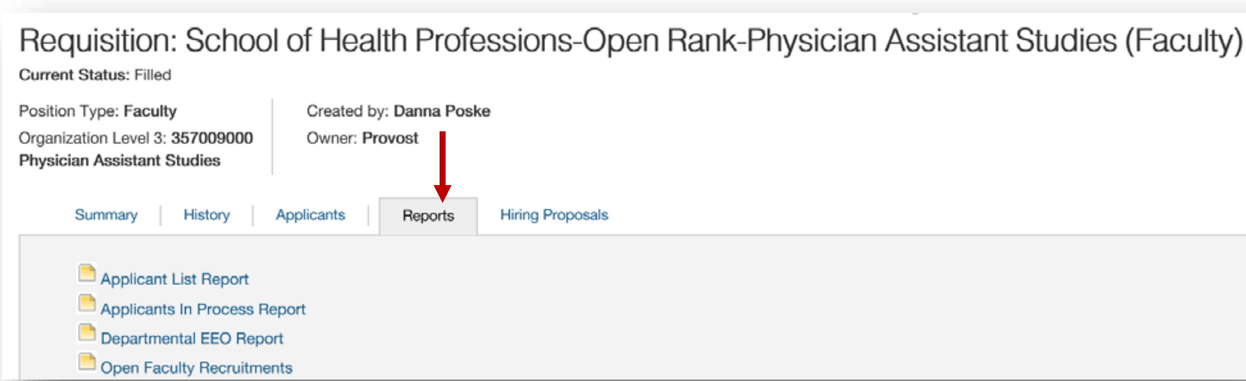
UAB Office of the Provost/Faculty Affairs on behalf of the Search Committee

Send Emails

Reporting—Candidate/Applicant Reports

PeopleAdmin users have the ability to generate several different reports within the system. All of these reports can be found under the **Reports tab** within the posting.

1. Click on the REQUISITIONS tab located at the top of the home page.
2. Search by posting/requisition title, position number or job opening number.
3. Select the posting/requisition.
4. Navigate to the **Reports Tab** within the posting.



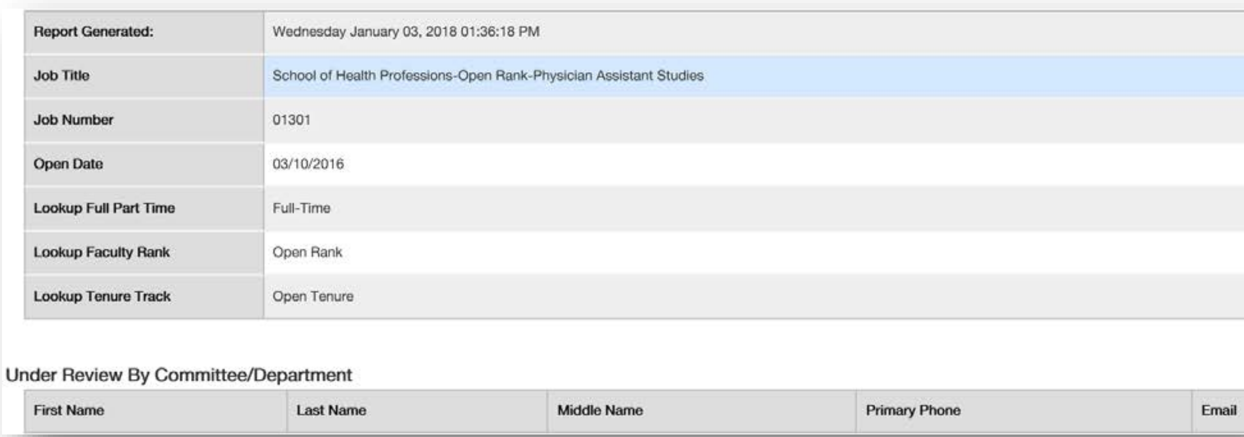
Here you will find all of the different reports that can be derived from a posting. These reports include the following:

- Open Faculty Recruitment
- Applicant List Report: includes the first name, last name and email address for all inactive and active applicants as well as each applicant's current workflow state within the posting.
- Applicant In Process Report: includes the first name, last name and email address for all inactive and active applicants broken down by current workflow state

Once you select one of these reports, it will be placed in a queue that will open in another browser window (shown below).

TIP: There will be a short wait as the report is generated, but Users can use the refresh button on the browser window to speed up this process.

When the report is complete, the status will change from Queued to Complete, and you will be able to open your report by selecting the **Actions link and clicking View report**.



Report Generated:	Wednesday January 03, 2018 01:36:18 PM
Job Title	School of Health Professions-Open Rank-Physician Assistant Studies
Job Number	01301
Open Date	03/10/2016
Lookup Full Part Time	Full-Time
Lookup Faculty Rank	Open Rank
Lookup Tenure Track	Open Tenure

Under Review By Committee/Department

First Name	Last Name	Middle Name	Primary Phone	Email

An abbreviated version of this user guide is also available.