Candidate Management Job Aid

This job aid is designed to walk you through the steps of moving candidates through the search process.

Navigation Path:

- From the One home page, scroll to the bottom of the page to access the Taleo Recruiting link or from uab.edu, access the Taleo Recruiting System button from the Admin Systems page under the Quick links.

  http://www.uab.edu/adminsys/

  Bookmark the Recruiting System Admin page by clicking Favorites/Add to Favorites once you are on the page.

- Log in with your BlazerID and password

This is the auto generated email you will receive from the system once the Recruiter moves a candidate into your queue for review. The Taleo link will take you to log in to the Recruiting System.

Dear Kendra HM,

Denzel Washington has passed our initial HR Screen for requisition 1500001P Test #3. Please log into Taleo and review this candidate.

Best Regards,
Kendra Power Recruiter
klthompson@uab.edu

Hiring Manager Dashboard

Afer successfully logging in, you will access the Hiring Manager Dashboard and start all tasks from this page:

Core Navigation Bar

- Click the Home Button to return to the Hiring Manager Dashboard at any time
- Access your Tasks list, Requisitions and Candidates lists or Offers list from the Core Navigation Bar
- Click the Home Button to return to the Hiring Manager Dashboard at any time
- Click Sign Out to completely log out of the Recruiting System

**Show Information For Filter –** Filter on requisitions you own, you collaborate on or all.

Refresh - The center stage displays a Refresh button to allow users to update all the channels with the latest numbers.

Channels - display status-oriented data about your activities. From the links on the channels, you can access information on requisitions, candidates, job offers, etc. Click the channel heading (i.e., View Requisitions, View Candidates, Tasks) to access. The Expand/Collapse button will collapse the menus but not the headings of the Channel.

Collapse the **Help** menu to increase your work space. Click the **Expand/Collapse button** again if you need to access Help files.

Accessing Candidates

It is best practice to access your candidates by the Requisition link on the core toolbar. *If you use the Candidates tool on this toolbar, you will be viewing a list of all candidates that you have access to, including hired candidates.*
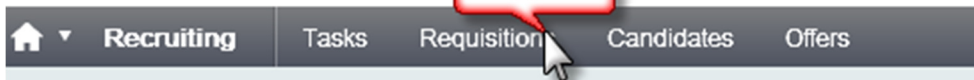
From the **core navigation toolbar** on the dashboard, click Requisitions.

You are now viewing the requisitions you own or collaborate on. Click the **Number** in the candidate column.

You are now viewing the **candidate pool for a specific job (requisition)**:

Moving Candidates of Interest:

You have two options to move candidates through the workflow:

1. Move one or more candidates directly from the applicant pool. **(You may move multiple candidates at once, but they must start and end in the same Step and Selection Status**):
    a. Hover your mouse over the name
    b. Place a checkmark next to the name
    c. Click the More Actions menu
    d. Select Change Step/Status

Candidates for:

Administrative Associate for Testing 12/10 (1400006Q)

✓	⚑	⊗	Candidate		More Actions ▼		on	Submission Completed	✎	⌂	★	Step 1 ▲
					Compare...							
					Create Self-assigned Task...							
✓	⚑		Applicant, E					✔		⌂		HM
✓			Combs, Se		Change Step/status...			✔	✎			HM
					Revert...							
✓			Pickle, Dyl (11220)			en		✔	✎			HM
✓			Major, Art (11060)			en		✔	✎			Offer

2. Move the candidate directly from the candidate record:

  a. Locate your candidate in the candidate list

  b. Click the candidate's name

  c. Click the More Actions menu

  d. Select Change Step/Status

Combs, Sean applied for requisition:

Administrative Associate for Testing 12/10 (1400006Q)

More Actions ▾
- Create Self-assigned Task...
- Change Step/status...
- Revert...

Job Submission ▾

▾ 1. Personal Information

Candidate Personal Information

Internal Candidate
No
First Name
Sean
Last Name

  e. If the candidate matches the requirements of the job and you will move forward with the individual, select Passed HM Screen under **New Status**. The step is HM Screen and is not available to change because this is your first step.

Change Step and Status

Current Step	Current Status
HM Screen	To Be Reviewed

Information

New Step ⚑
HM Screen

New Status
For Further Review

- HM Not Selected - More Qualified Candidate Selected
- HM Not Selected - Phone Interview Failed To Confirm Qualifications
- HM Not Selected - Failed to Respond
- Applicant Withdrew
- Passed HM Screen*

Save and Continue Save and Close Cancel

  f. Click Save & Close to keep the candidate in this step and status.

g. Click Save & Continue to move into the second step for the candidate.

h. The new step will default to HM Interview. Do not change the step.

i. **If you have or will interview the candidate, drop down on the new status menu and select HM Interview**

j. Click Save & Close.

k. After interviewing the candidate, select the candidate by clicking their name

l. Click More Actions/Change Step & Status

m. The Step will default to HM Interviews

n. Drop down on the New Status menu to select Create Offer.

o. This will automatically generate an email to the Recruiter to create an offer for this candidate.

p.

Note: You may skip the statuses not required if they do not apply.

Statuses under the HM Screens Step	Explanation
To be reviewed	Default status – when you receive the candidate from the Recruiter, the candidate will be in the status of to be reviewed.
For further review	Parking lot - You have reviewed This candidate and they meet the requirement of the job and will remain in this status for possible further consideration. OPTIONAL
HM Phone Screen	The hiring department has contacted the candidate for the initial phone screen. OPTIONAL
HM Not Selected - More Qualified Candidate Selected	Candidate will not move forward in the selection process. Choose appropriate disposition. **This is the move in bulk option.** OPTIONAL
HM Not Selected - Not Best Match For Job/Work Unit	Candidate will not move forward in the selection process. Choose appropriate disposition. OPTIONAL
HM Not Selected - Interview Failed To Confirm Qualifications	Candidate will not move forward in the selection process. Choose appropriate disposition. OPTIONAL
HM Not Selected - Salary Expectations Are Not In Line With Compensation Range For Position	Candidate will not move forward in the selection process. Choose appropriate disposition. OPTIONAL
HM Not Selected - Failed to Respond	Candidate will not move forward in the selection process. Choose appropriate disposition. OPTIONAL
Passed HM Screen*	Candidates information has been reviewed and department has determined the candidate should move to the next step. REQUIRED
Applicant Withdrew	Candidate has elected to withdraw paperwork for position. OPTIONAL

Moving Candidates Not Selected

Note: Upon initial submission, candidates are in a Step of "HM Screen" and a Selection Status "To be Reviewed"

Candidates that you will not interview need to be dispositioned in the HM Screen step.

If you interview a candidate and do not select them, disposition them in the HM Interview step.

You have two options to move candidates through the workflow:

1. Move one or more candidates directly from the applicant pool. (You may move multiple candidates at once, but they must start and end in the same Step and Selection Status):
2. Move the candidate directly from the candidate record:
    a. Locate your candidate in the candidate list. Hover your mouse over the name.
    b. Place a checkmark next to their name.
    c. Click the More Actions menu.
    d. Select Change Step/Status
    e. In the "New Status" box, select the appropriate choice.
    f. Please disposition in the appropriate step.

HM Interviews	Explanations
HM Interview	Default status
2nd Interview	Status can be used to differentiate candidates who have had multiple interviews with the hiring department.
Previously Interviewed	If candidate interviewed recently, you do not need to interview the candidate again and can place in this status.
HM Not Selected - More Qualified Candidate Selected	Candidate will not move forward in the selection process. Choose appropriate disposition. **This is the move in bulk option.**
HM Not Selected - Not Best Match For Job/Work Unit	Candidate will not move forward in the selection process. Choose appropriate disposition.
HM Not Selected - Interview Failed To Confirm Qualifications	Candidate will not move forward in the selection process. Choose appropriate disposition.
HM Not Selected - Salary Expectations Are Not In Line With Compensation Range For Position	Candidate will not move forward in the selection process. Choose appropriate disposition.
HM Not Selected - Failed to Respond	Candidate will not move forward in the selection process. Choose appropriate disposition.
Applicant Withdrew	Candidate has elected to withdraw paperwork for position
Create Offer	Hospital positions – Please provide details specific to the shift and/or job number if applicable in the comments section.

Once the candidate is moved to create offer status, the recruiter will contact the Hiring Manager to finalize details. |

	Once HM moves to Create Offer the Recruiter moves the candidate through the remaining steps. The Recruiter moves candidate from create offer to offer to be made - Recruiter will contact the hiring department if details of offer have not been discussed.

g. A Details or Disposition field is available if a Not selected status is selected. Please provide pertinent details for tracking purposes.

h. Click Save and Close.

Tips and Tricks:

- Once finalist candidate is identified, remaining candidates need to be moved to the status of "Not Selected" or "Applicant Withdrew" with a brief explanation of why the candidate was not selected.
- Move multiple candidates who meet the minimum qualifications but do not warrant next steps by selecting all and moving them to a **Step** of "HM Screen" and a **Status** of "More Qualified Person Selected."

- *Note: Please be sure to disable pop-up blockers to be able to open the Excel file.*

Exporting Entire Candidate List to Excel

1. Click the Requisitions tab.

2. Locate the requisition.

3. Locate number to the left of the requisition title to access the candidate list.

4. Click the number to access the candidate list.

5. Locate the Select All icon.

6. Check the box.

7. Click the Excel icon.

2.

8. Depending on your browser setting, you may be prompted to Open or Save the file on your desktop. Select your preference.

9. Click ok.

10. An Excel spreadsheet will open.

Note: For best results, it is recommended that no more than 50 candidates be selected at a time.

Tips & Tricks

• Exporting the candidate list to Excel will help the user identify remaining candidates that need to be dispositioned properly.

Printing a Candidate File

1. Go to the Requisitions tab.

2. Click the **Number** to the left of the requisition title to access the candidate list.

3. You are now viewing the candidate list.
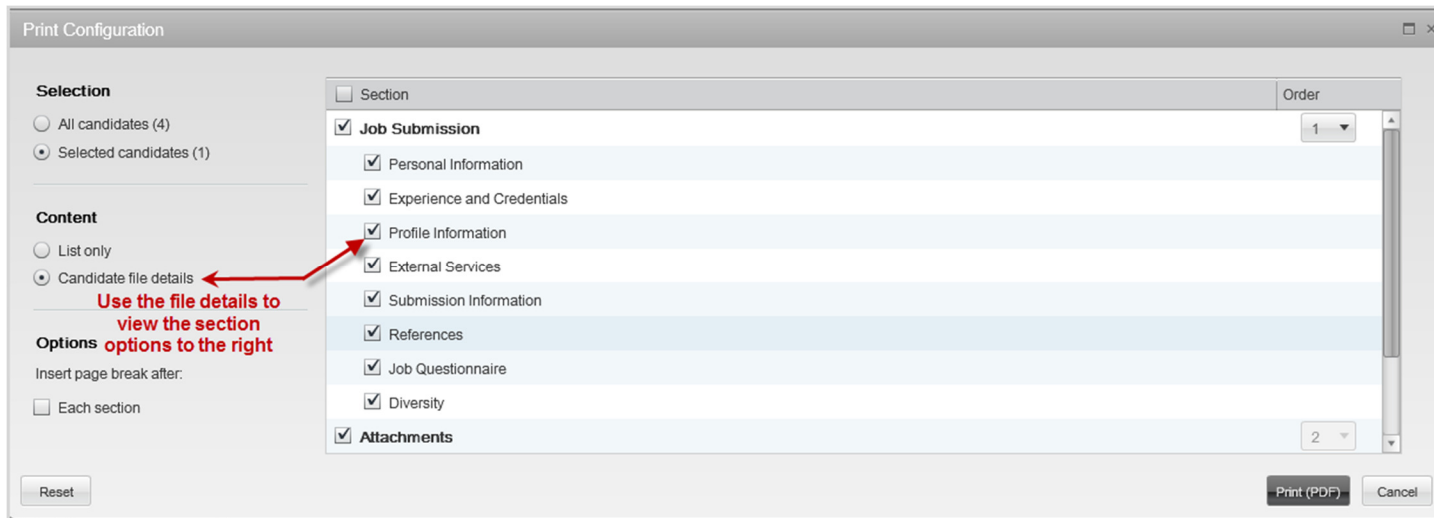
4. Place a checkmark next to the candidate(s) name.

5. Click **Print File**.

6. Select which sections you want to print.

7. Click **Print (PDF).**
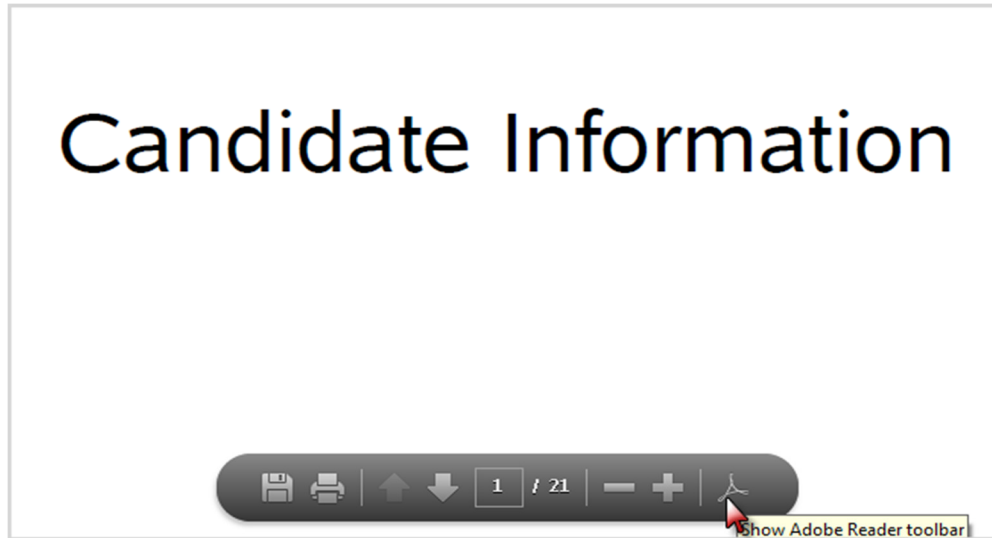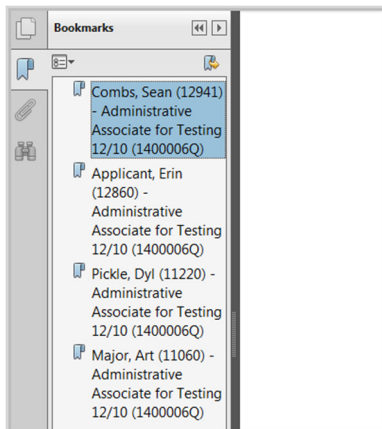
8. Based on your browser settings, a new window or tab will open asking to Open or Save file or the document will open in a new browser tab.

9. If you print multiple candidates, activate the adobe reader toolbar to use the bookmarks to navigate to each candidate's information.

10. A **Table of Contents** will appear on the left hand side of the file.

*Note: The **Bookmark** function will allow you to navigate directly to a candidate's file. For best results, it is recommended that no more than 50 candidates be selected at a time.*

System Generated Email from Hiring Manager to Recruiter when ready to create offer:

Please create an offer for John Mellancamp for requisition 1500004F Hiring Manager - Neena.

Best regards,
Neena HM