Taleo Applicant Tracking System
Taleo is a cloud-based Applicant Tracking System used to manage talent acquisition processes in order to find the best possible candidates. As a Hiring Manager, your role is to record the steps and statuses of the individuals you review in the process.

Accessing Taleo
- Hospital Hiring Managers - from the One home page, scroll to the bottom of the page to access the Taleo link or from uab.edu, access the Taleo Recruiting System button from the Admin Systems page under Quick links. [http://www.uab.edu/adminsys/](http://www.uab.edu/adminsys/)
- Bookmark the System Admin page by clicking Favorites/Add to Favorites once you are on the page.
- Log in with your BlazerID and password

PAR – Position Authorization Request Form
- Requests to Classify New Positions, Refill Positions, Reclassify Vacant Positions, Temporary Services and FastTrack requests all feed into the Taleo system from the forms application called [PAR – Position Authorization Request](#).
- After the form is submitted in PAR, the Workflow Approval Process (WAM) triggers and the departments WAM approvers must approve or return the request. (Form entry process varies by location)
- The system feeds the approved forms into Taleo multiple times a day.
- Recruitment Services then prepares the requisition (positions) for posting to the career site based on the instructions provided by the department in the PAR system.
- Click here for information on the Forms system to submit a position authorization request.

PAR to Taleo

<table>
<thead>
<tr>
<th>Approved PAR documents feed into Taleo (Monday - Friday)</th>
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</thead>
<tbody>
<tr>
<td>6:20am</td>
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<tr>
<td>8:20am</td>
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<tr>
<td>10:20am</td>
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<td>12:20pm</td>
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<td>2:20pm</td>
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<td>3:45pm</td>
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Candidate Selection Workflow

As a Hiring Manager, your role is to record the steps and statuses of the individuals you review in the process of filling a new position or refilling a position.

Taleo’s Candidate Selection Workflow is a stepped methodology where job applicants are selected as a candidate and proceed through the various steps toward being hired for the position, or for disposition of candidates who are no longer being considered. The process of moving a candidate through the Workflow is defined by the Workflow steps* and the candidate’s status** at each step. This is the point where either a candidate is moved forward to the next step, or it is determined that they will not be selected and the reason why.

**Step: A candidate's progression within the Workflow is identified by its current step. Candidate status starts at the first status level in each step. Status is changed based on what actions are taken with the candidate while they are in this step. There is a built-in hierarchy of available statuses within each step.

**Status: The status of a candidate reflects the detail of where they are currently within the step. There is a defined hierarchy of statuses within each step. Movement through the available statuses is caused by completing intermediary status requirements, which causes a move to the next status, until the completion status is reached (completion statuses are marked with an "**" in the status drop-down menu). Once the completion status has been reached, the candidate moves to the next step, or is not selected or candidate withdrew. Candidates can be determined not selected or candidate withdrew at any time during any step or status. When a candidate is not selected or chooses to withdraw, disposition of the candidate should take place. The step would stay the same, the status would be changed to not selected or candidate withdrew. This way the candidate history is retained and can be easily viewed for future candidate searches.

New Candidates for Hiring Manager's Review
• If an applicant meets the qualifications listed in the job description, the Recruiter will change the step and status to **HM* Screen/To Be Reviewed**.

• For each candidate changed to HM Screen/To Be Reviewed, the Hiring Manager and Hiring Manager Assistant listed on the requisition (entered by department in PAR form) will automatically receive the notification below.

*HM = Hiring Manager

Hiring Manager and Hiring Manager Assistant Notification

Dear HM,

Dear {Requisition.HmgrName},

{Candidate.FullName} has passed our initial HR Screen for requisition {Requisition.ContestNumber} {Requisition.JobTitle}. Please open Chrome or Edge and visit uab.edu/adminsyst or the One Page to log into Taleo and review this candidate. The new Taleo platform does not work in Internet Explorer.

Best Regards,

Kendra Power Recruiter
klthompson@uab.edu
Welcome Center
Afer successfully logging in, the hiring manager will land at the Welcome Center and start all tasks from this page.

Core Navigation Bar
- Click the Home Button to return to the Welcome Center at any time

Quick Access
- Hiring Managers can still switch between the Legacy Recruiting (flash based) system and the new platform August 29-December 31, 2020. Starting 1.1.21, this link will be removed.
- **Campus** Hiring Managers can access Onboarding from this menu. (Hospital does not currently use Onboarding.)
- All Managers can link to requisitions or submissions from the Quick Access Menu.
Requisition Filters
Click Requisitions from the Quick Access Menu. You can then use the Core Navigation Bar to navigate.

1. The default view includes requisitions you own or collaborate on. Place a check in the “Include inactive requisitions” check box to include filled or canceled requisitions in your list.
2. Expand the Status drop down to select certain statuses to filter your list.
3. Click Apply Filters with each change or Clear All to return to the default view.
4. View the applied filters under the Requisition Heading.
Requisition Search by Requisition ID

- Click Requisitions from the Core Navigation bar
- Enter the Requisition ID into the Req ID filter field
- Click Apply Filters
Requisition Search by Hiring Manager

- If you support more than one hiring manager, you can filter your requisition list. Note: these filters only show results for requisitions that you own or collaborate on.
- Use the selector button to search for Hiring Managers

- Enter the name or Email of the Hiring Manager
- Click Apply Filters
- Click Select
Requisition List

To view your requisitions, click Requisitions under Quick Access or from the Core Navigation Menu once in the Recruiting module.

1. Use the core navigation toolbar to access the Requisition list by clicking Requisitions.
2. Sort the Requisition list ascending or descending by clicking the column heading.
3. Click the number (candidate count referred by recruiter) to access submissions referred by Recruiter.
4. Click the Title of the Requisition to view the details of the job posting.
5. The ID Column is the PAR Document number with a T prefix. This is the req number and is displayed on the career site.
Submissions (Accessed from Requisition List)

- Click the Number in the candidate column to access the submissions referred to the Hiring Manager by the Recruiter for each requisition.

Submissions (Accessed from Submissions on Core Navigation toolbar)

1. Use the **core navigation toolbar** to access the Submissions list by clicking **Submissions**.
2. Preview the Requisition by clicking the preview button by the **Requisition title**.
3. Sort the Submissions list ascending or descending by clicking the column heading.
4. Use the Filters on the left panel, to view submissions in a certain step/status (Click Apply Candidate Filters).
5. Use the Up Arrow to minimize the filter panel.
6. Click the Name of the Candidate to view the details of the submission.
7. Use the checkbox to select the individual/s you need to work with to print, download, change, etc.
8. The Red Flag indicates a candidate you have yet to open for review.
Review Submission – Resume

- From the Submissions list, click the Candidate’s Name.

1. Click the Resume button
2. The left summary panel provides a quick view of the candidates’ highlights including a quick view of the most recent Education and Work Experience
3. House Icon – the candidate used their BlazerID to log in
4. Resume Toolbar – use to zoom in and navigate the resume within Taleo
5. Use the X at the top right to close the resume or to navigate pages
6. Use the Up Arrow to minimize the summary panel (and the down arrow to maximize)
7. Toolbar to print, change step and status and download resume
8. The top right navigation tools take you back to the submission list
Resume Toolbar

Print Candidate File: No, Jezebel

11 Sections are selected
- Select all sections
- Insert page break after each section

1
- Job Submission
  - Personal Information
  - Profile Questionnaire
  - Job Questionnaire
  - External Services
  - Submission Information
  - References

2
- Attachments
  - Most recent flagged resume
  - Happy Recruiter resume.docx

⚠️ Warning
This action will store information locally on your computer. This can be a security hazard if sensitive information is contained. If you want to proceed, click Print PDF. Then, if applicable, delete the resulting temporary file from your computer, or delete your browser history.

Reset  Cancel  Print PDF
Review Job Submission

- Once you close the resume, you are returned to the job submission view

1. Use the Ribbon to determine the path navigated to land at this page
2. Use the Up Arrow to collapse the Summary Panel
3. Use the toolbar to apply certain actions on the job submission (step/status, print, etc.)
4. Use the Tabs to move between the job submission and attachments
5. Use the Preview button for a quick view of the requisition content
6. Use the Navigation Tools to return to the Submission list
7. Use the Expand All option to view all sections of the job submission

- or Collapse All to return to the condensed view
Review Job Submission Continued

- View the Other Active Submissions for this candidate **on Requisitions You Own or Collaborate**. Click the X to close the list of Submissions
- Switch between the General Profile or the Submission by Clicking and Dragging
Moving Candidates of Interest:

1. Options to change the step and status of candidates
   a. From the candidate pool, place a checkmark in the check box to the left of the name. Click More Actions/Change Step and Status

You may move multiple candidates at once, but they must start and end in the same Step and Selection Status

   b. From the candidate’s submission, click More Actions/Change Step and Status

Click the number located to the left of the requisition title to open the candidate pool.
Moving Candidates to Passed HM Screen:

If the candidate matches the requirements of the job and you will move forward with the individual, select **Passed HM Screen** under “Change To” Status.

- For **Hospital Requisitions**, the system will automatically send an email to the Recruiter once you click Apply & Close. The email is a request for HR to schedule an interview with the individual. For all other locations (campus locations), an email is not sent with this status change.
- Click Apply & Continue or Apply & Close
  - A candidate who is progressed to a status that completes a Candidate Selection Workflow step using the Apply and Continue button will automatically be progressed to the initial status of the next step in the workflow
  - Clicking Apply and Close keeps the candidate in the step/status in the ‘change to’ section
  - Clicking Cancel cancels all selections
Moving Candidates to **HM Interviews**:

- In this example, we will continue with Oracle Tester from above
- After interviewing the candidate, select the candidate by clicking their name or open their submission
- Click More Actions/Change Step & Status
- Since Oracle Tester is already in HM Screen/Passed HM Screen (a completion status indicated by the asterisks), the candidate will automatically be in the next Step – HM Interviews
- Drop down on the New Status menu to select **HM Interviews**
- Click Apply and Close.  This tracks how many of your referrals were interviewed by the department.

Moving Candidates to **Create Offer**:

- In this example, we will continue with Oracle Tester from above
- Select the candidate or open their submission
- Click More Actions/Change Step & Status
- Click the drop down under “Change To” Status.
- Select **Create Offer**

**CAMPUS Hiring Managers** - To expedite and streamline the offer process, please enter the offer details in the "Comments" section when moving a candidate to "HM Interviews- Create Offer".  **Offer details include** the hourly/annual offer amount AND preferred start date

- Click Apply & Close

An email is delivered to the Requisition’s Recruiter notifying them to start the offer process.

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

- From the Core Navigation Toolbar, click offers.
- This list contains candidates from your requisitions that are in the Offer and Hire step with any status – Rescinded, Not Selected, Accepted, etc.

- Use Filters to narrow down the list
• Click the Candidate’s name to view the offer.
Moving Candidates Not Selected:

Note: Upon initial referral, candidates are in a Step of “HM Screen” and a Selection Status “To be Reviewed”

- If you interview a candidate and do not select them, disposition in the HM Interview step after saving the HM Interview status to indicate you did interview the candidate.

Step and Status changes impact the communications sent to Candidates by email and the career site. To keep the candidates informed, it is essential that Hiring Managers change the step and status of EACH referral.
Moving Not Selected Candidates In Bulk:

- Once the finalist candidate is identified, remaining candidates need to be moved to the status of “Not Selected-Not Best Qualified” or separately if there is a disposition that matches their situation
- Select the candidates by checking the boxes to left of their names

If the candidates are in the same step and status, you may select multiple submissions to disposition in bulk by checking the boxes to the left of their names.

- Click More Actions
- Click Change Step and Status
Moving Not Selected Candidates In Bulk Continued:

- Drop down and select Manager Not Selected – Not Best Qualified
- Click Apply & Close
Exporting Candidate List to Excel

- Click the Requisitions tab.
- Locate the requisition.
- Click the number to the left of the requisition title to access the candidate list.

- Click the Select All icon.
- Click More Actions
- Click Download as Excel and open the downloaded file (process varies based on browser)
Print from Submission of Candidate
The candidates’ information can be printed from the submission view or the list view.

1. Submission View. **Click the candidates name** from the pool of a specific requisition to print from the submission view.
2. Click the Printer icon on the toolbar.
Print Dialog Box

- The print dialog box contains the sections of the submission. Check the sections you wish to print.
- Check the Resume and other attachments if candidate included.
- Click Print PDF.

Warning
This action will store information locally and generate a PDF. Then, if applicable, delete the rest.
Print from Submission List

- Check the box to left of the name in the submission list for the requisition.
- Use the select all button to select multiple names to print at once.
- Use the select all drop down to select none, etc.
- Click the Print button on the toolbar.
- Select Candidate File Details.
- Select the sections of the submission.
- Click Print PDF.
## Emails within Hiring Manager workflow

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Trigger</th>
<th>Content</th>
</tr>
</thead>
</table>
| Candidate | Step and Status changed to HM Screen/To Be Reviewed | Dear {Candidate.FullName}:
You are progressing through the recruitment process and your application is under review for Job number {Requisition.JobTitle}-{Requisition.Number}. Log in to your job page to monitor your job and submission statuses.

Best regards,
UAB Human Resources |

| Hiring Manager & HM Assistant on Requisition | Step and Status changed to HM Screen/To Be Reviewed | Dear {Requisition.HmgrName},
{Candidate.FullName} has passed our initial HR Screen for requisition {Requisition.ContestNumber} {Requisition.JobTitle}. Please open Chrome or Edge and visit uab.edu/adminsys or the One Page to log into Taleo and review this candidate. The new Taleo platform does not work in Internet Explorer.

Best Regards,
(Requisition.RecruiterName)
(Requisition.RecruiterEmail) |

| Recruiter – Hospital Requisitions only | Step and Status changed to HM Screen/Passed HM Screen | Please schedule an interview with {Candidate.FullName} for the {Requisition.JobTitle} position.

Best regards,
Hospital Hiring Manager |

| Recruiter | Step and Status changed to HM Interviews/Create Offer | Please create an offer for John Mellancamp for requisition 1500004F Hiring Manager - Neena.

Best regards,
Hiring Manager |

| Candidate – Campus Requisitions Only | Recruiter changes step and status to PreOffer/Background Consent | You must submit the final page in order to complete the background consent. You must submit the final page in order to complete the background consent. Additional Candidate Instructions:
1. Click the link below and log in using the username "candidate" and the password that you created when applying for jobs on the UAB Career site.
2. After logging in, read the background consent information and click the bottom of the page to "Accept". If you accept, you then have the opportunity to review the background information and correct any errors if desired. Your profile will be saved in your background information. If you do not agree to the information, your application will be stopped.
3. Be sure to click the "Accept" button. If you do not agree to the information, your application will be stopped.
4. Click the link below to enter your background: https://uab.edu/careers. If you have any questions, please call 205-934-3000. Your immediate response is appreciated. |

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<table>
<thead>
<tr>
<th>Recipient</th>
<th>Trigger</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Manager - Campus Requisitions Only</td>
<td>Recruiter changes step and status to <strong>PreOffer/Initiate BG check</strong>. In most cases, this happens after the consent is received from the Candidate.</td>
<td>Candidate has progressed to the Initiate Background Status. Standard background checks can take up to seven business days and international checks can take up to 30 business days. Timeframes may vary depending on state, county or country requirements. Best Regards, UAB Human Resources</td>
</tr>
<tr>
<td>Recruiter &amp; Hiring Manager - Campus Requisitions Only</td>
<td>When Candidate accepts/declines electronic offer via the UAB Career site.</td>
<td>Candidate has accepted/declined the offer on Requisition <strong>{Requisition.JobTitle} – {Requisition.Number}</strong>.</td>
</tr>
</tbody>
</table>
Hiring Process

Overview of Hiring Process

1. **STEP 1** Request
2. **STEP 2** Post
3. **STEP 3** Recruit
4. **STEP 4** Hiring manager interviews and screens
5. **STEP 5** Background check
6. **STEP 6** Offer and hire
7. **STEP 7** Onboarding

- Hiring manager’s responsibility
- Recruiter’s responsibility

The links below detail how to start the recruitment process for classifying new positions or refilling vacancies.

- For a step-by-step recruitment guide, click here.
- For roles and responsibilities throughout the hiring process, click here.
Other Resources

- Campus Recruitment Process Timeline
- Overview of the Hiring Process
- Manager’s Toolkit – Recruiting Employees
- UAB Career Site

Questions?

Please contact uabjobs@uab.edu or
Campus Recruitment Services at 205.934.7030
Hospital Recruitment Services at 205.934.1285