Taleo Recruiting System – Hiring Manager

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
- **Campus** visit my.uab.edu. If Taleo is not listed under myApps, click Manage Apps, find Taleo and ADD. Moving forward Taleo will be on the My Apps from in the portal.
- 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>
</tr>
</thead>
<tbody>
<tr>
<td>6:20am</td>
</tr>
<tr>
<td>8:20am</td>
</tr>
<tr>
<td>10:20am</td>
</tr>
<tr>
<td>12:20pm</td>
</tr>
<tr>
<td>2:20pm</td>
</tr>
<tr>
<td>3:45pm</td>
</tr>
</tbody>
</table>
## STEP: HM SCREEN

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Be Reviewed</td>
<td>Default status — when you receive the candidate from the Recruiter, the candidate will be in the status of to be reviewed.</td>
</tr>
<tr>
<td>For Further Review</td>
<td>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. This is an optional status.</td>
</tr>
<tr>
<td>HM Phone Screen</td>
<td>The hiring department has contacted the candidate for the initial phone screen. Select this status if you phone screened the candidate.</td>
</tr>
<tr>
<td>HM Not Selected (more qualified candidate selected)</td>
<td>Candidate will not move forward in the selection process. This is the move in bulk option. Although you might not have a selected candidate at the time of dispositioning, this is the selection if the other two options do not match the situation.</td>
</tr>
<tr>
<td>HM Not Selected (phone interview failed to confirm qualifications)</td>
<td>Candidate was phone interviewed and it was determined that the candidate will not move forward in the selection process.</td>
</tr>
<tr>
<td>HM Not Selected (failed to respond)</td>
<td>The candidate did not respond and will not move forward in the selection process.</td>
</tr>
<tr>
<td>Applicant Withdraw</td>
<td>The candidate withdrew using the tools on the career site or by contacting the hiring manager.</td>
</tr>
<tr>
<td>Passed HM Screen</td>
<td>Candidates information has been reviewed and department has determined candidate should move to the next step. If HR schedules your interviews, making this status selection and clicking apply and close or apply and continue will generate an email to the recruiter to set up an interview.</td>
</tr>
<tr>
<td>Not Selected</td>
<td>HR USE ONLY</td>
</tr>
<tr>
<td>Applicant Withdraw</td>
<td>HR USE ONLY</td>
</tr>
</tbody>
</table>

*Automatic email generated with Apply and Close or Apply and Continue*
### STEP: HM INTERVIEW

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HM Interviews</td>
<td>Default status for HM Interview step. Select this status and click apply and close or apply and continue if you interviewed the candidate.</td>
</tr>
<tr>
<td>2nd Interview</td>
<td>Select this status and click apply and close or apply and continue if you performed a 2nd interview with the candidate.</td>
</tr>
<tr>
<td>Previously Interviewed</td>
<td>If candidate interviewed recently, you do not need to interview the candidate again and can place in this status.</td>
</tr>
<tr>
<td>HM Not Selected (more qualified candidate selected)</td>
<td>Candidate will not move forward in the selection process. This is the move in bulk option. Although you might not have a selected candidate at the time of dispositioning, this is the selection if the other options do not match the situation.</td>
</tr>
<tr>
<td>HM Not Selected (not best match for job/work unit)</td>
<td>Candidate will not move forward in the selection process.</td>
</tr>
<tr>
<td>HM Not Selected (interview failed to confirm qualifications)</td>
<td>Candidate was interviewed and it was determined that the candidate will not move forward in the selection process.</td>
</tr>
<tr>
<td>HM Not Selected (salary expectations not in line w/ compensation range)</td>
<td>Candidate's salary expectations did not match the compensation range for the position and will not move forward in the selection process.</td>
</tr>
<tr>
<td>HM Not Selected (failed to respond)</td>
<td>Candidate did not respond and will not move forward in the selection process.</td>
</tr>
<tr>
<td>Applicant Withdrew</td>
<td>Candidate withdrew using the tools on the career site or by contacting the hiring manager.</td>
</tr>
<tr>
<td>Campus Salary Offer Request: CAMPUS USE ONLY</td>
<td>Candidate information has been reviewed and department determined candidate should move forward with an offer of employment. Making this status selection and clicking apply and close or apply and continue will generate an email to the recruiter to determine a salary offer range for candidate. Recruiter will send an email to hiring manager and hiring manager assistant with calculated salary offer range.</td>
</tr>
<tr>
<td>Create Offer</td>
<td>Candidate information has been reviewed and department determined candidate should move to next step. Selecting this status and clicking apply and close completes the process for the candidate and sends an email to recruiter to move forward with offer. Hospital positions: please provide details specific to the shift and/or job number if applicable in the comments section. Campus positions only: please enter the offer details in the comments section, offer details include the hourly/annual offer amount AND preferred start date. Once candidate is moved to create offer status, recruiter will contact hiring manager to finalize details. Once hiring manager moves to create offer, recruiter moves candidate through the remaining steps.</td>
</tr>
<tr>
<td>Not Selected</td>
<td>HR USE ONLY</td>
</tr>
<tr>
<td>Not Selected</td>
<td>HR USE ONLY</td>
</tr>
</tbody>
</table>

*Automatic email generated with Apply and Close or Apply and Continue*
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 (Requisition.HmgrName),

(Candidate.FullName) has passed our initial HR Screen for requisition (Requisition.ContestNumber) (Requisition.JobTitle). Please open Chrome and visit my.uab.edu or the One Page to log into Taleo and review this candidate.

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

If you are currently logged into Taleo, use this link to access the submission for this candidate.  (Candidate.CandidateSubmissionUrl)

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Welcome Center

After 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**

- **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.
- Click Sign Out to exit Taleo
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.
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

- Change the Step and Status from the Resume View
- Download the Resume
- Print the Resume
- Print the Candidate Submission

**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.
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
- 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
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.**

**CAMPUS Moving Candidates to Salary Offer Request:**

- Candidate information has been reviewed and the department determined candidate should move forward with an offer of employment.
- Making this status selection and clicking apply and close or apply and continue will generate an email to the recruiter to determine a salary offer range for candidate.
- Recruiter will send an email to hiring manager and hiring manager assistant with calculated salary offer range.

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”

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 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.
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 & Hiring Manager 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 Campus Requisitions Only | Step and Status changed to HM Interview/Campus Salary Offer Request | Please calculate a salary offer for {Candidate.FullName} (Candidate ID: {Candidate.IdentificationNumber}) for requisition {Requisition.ContestNumber} {Requisition.JobTitle}.

If you are currently logged into Taleo, use this link to access the submission for this candidate. {Candidate.CandidateSubmissionUrl}

Candidate Contact Information:

{Candidate.Email}
{Candidate.HomePhone} |

Best regards,
{Requisition.HmgrName} |
<table>
<thead>
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</tr>
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</table>
| Hiring Manager & Hiring Manager Assistant Campus Requisitions Only | After receiving the salary offer request                               | Subject: Salary offer range for {Requisition.ContestNumber}  
Dear {Requisition.HmgrName},

The calculated salary offer range for (Candidate.FullName) (Candidate ID: {Candidate.IdentificationNumber}) on requisition {Requisition.ContestNumber} {Requisition.JobTitle} is listed below.

Employee Salary (if applicable): $(Staffing Specialist to enter employee’s salary)  
Minimum salary offer: $(Staffing Specialist to enter min salary)  
Target salary offer: $(Staffing Specialist to enter target salary)  
Maximum salary offer: $(Staffing Specialist to enter max salary)

If you would like to offer a salary amount above the calculated range, a salary CRF will need to be submitted for review and approval by Compensation. Click here for more information. Please determine your salary offer and include it in the Comments section when you move your selected candidate to Create Offer. If your departmental budget cannot afford the minimum salary offer above, please state the rationale in the Comments section of the Create Offer along with the salary amount.

If you are currently logged into Taleo, use this link to access the submission for this candidate. {Candidate.CandidateSubmissionUrl}

Best Regards,

{Requisition.RecruiterName}  
{Requisition.RecruiterEmail}

| 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

<p>| Candidate Campus Requisitions Only | Recruiter changes step and status to Pre/Post Offer Checks/Background Consent. In most cases, this happens after the Create offer is received from the Hiring Manager. |</p>
<table>
<thead>
<tr>
<th>Recipient</th>
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<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Manager &amp; Hiring Manager Assistant</td>
<td>Recruiter changes step and status to <strong>Pre/Post Offer Checks/Initiate</strong> BG check. 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>Campus Requisitions Only</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter &amp; Hiring Manager</td>
<td>When Candidate accepts/declines electronic offer via the UAB Career site.</td>
<td>Candidate has accepted/declined the offer on Requisition <code>{Requisition.JobTitle} – </code>{Requisition.Number}.</td>
</tr>
</tbody>
</table>
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