Applicant Workflow

Hiring Managers

Below is a visual diagram for the staff applicant flows and statuses in the Santa Clara University Online Recruitment System.

The applicant workflow process:

1. The Applicant receives a confirmation notification via the Applicant Portal that his or her application has been accepted. The corresponding default internal status is “Under Review by Hiring Manager”
2. The Hiring Manager will access the Posting and review Applicants (the system will determine if the applicant(s) meet minimum qualifications based on supplemental questions).
   a. If interested in an applicant, the Hiring Manager may request a phone interview and will take action to move the application to the phone interview status.
   b. If NOT interested in an applicant, the Hiring Manager will take action by selecting the appropriate reason code. This will trigger an email notification to the applicant when the posting is filled.
3. Following completion of the phone interview, Hiring Manager will move the status of the Applicant(s) to
   a. If interested in an applicant, move to “in-person interview” status.
   b. If NOT interested in an applicant, move to “phone interviewed, not selected” and assign the appropriate reason code. This will trigger an email notification to the applicant when the posting is filled.
The Hiring Manager will review the interview feedback.

c. **If interested in an applicant**, the Hiring Manager will schedule an In-Person interview with the Applicant. To accomplish this action, the Hiring Manager moves the Applicant Status to “In Person Interview.”

d. **If NOT interested in an applicant**, the Hiring Manager will take action on the application to move it to an Interviewed not selected and assign the appropriate reason code. This will trigger an email notification to the applicant when the posting is filled.

4. The Hiring Manager will conduct the in-person interview.

   a. **If interested in an applicant**, the Hiring Manager will move the applicant status to “Finalist” status will trigger a link to “Start Hiring Proposal” on the Applicant screen.

   b. **If interested in an applicant**, the Hiring Manager may move the applicant status to “Interviewed On-hold”

   c. **If NOT interested in an applicant**, the Hiring Manager will take action on the application to move it to an Interviewed not selected and assign the appropriate reason code. “phone interviewed, not selected” and assign the appropriate reason code. This will trigger an email notification to the candidate.

5. The final step will be to take action to “Start Hiring Proposal” on the Finalist. If more than one applicant is marked as a Finalist, the Hiring Manager can only select one candidate on which to start the Hiring Proposal.

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**Working with Applicants and Applications – Workflow Process**

To navigate to the Applicant Tracking module, you will select Applicant Tracking from the module drop down box at the top right of the screen.

Choose and refresh your role to Hiring Manager from the role drop down box at the top right.

You may access your postings in a number of ways:
• Navigate to the Postings Menu and select “Staff”. A list of your postings will display. Select a posting by clicking on the Job Title or select the Actions link to the right of the Job Title to view the Posting or View Applicants.

• Navigate to the Inbox where you will find postings that require your action. Select a posting by clicking on the Job Title.

• Navigate to the Watch List for any postings that you have marked as “Add to Watch List” when you created your posting. Select a posting by clicking on the Job Title.

(Selecting a Staff Posting from the Postings Menu):

In addition to viewing Postings and Applicants and Stop Watching, Hiring Managers may export all job posting results by selecting the Actions Button appearing above the Actions link.

Viewing Applicants/Applications:

You may view Applicants by clicking on the Applicant tab at the main Posting navigation menu (or View Applicants from the Actions link on the Staff Postings page.)
Working with Applicants and Workflow Process:

Having selected the Applicants tab on the Posting navigation menu, the system will display applicants who have applied to your posting. You may click on the Full Name to open the application or may select View Application from the Actions link to the right of the applicant’s Full Name.

In addition to opening the Applicant information, the Hiring Manager may print the applicant information and even see how the posting looked to the applicant, from this page.

Additionally, the Combined Document (located at the bottom of the page) field allows the user to view the full PDF of the application and any required documents on each applicant. To add a Combined Document to one or more applicants’ records, select the desired applicant(s) and select the bulk action to “Create Document PDF Per Applicant.” The system will generate a link when the combined document is available.
The Applicant’s Job application is visible and displays current status, as well as the details of the full application, including additional tabs for Recommendations, History (of transactions) and Applicant Reports. The Hiring Manager will review the application and determine if there is interest to move the applicant to “Phone Interview”. If there is no interest in the applicant at this point, Hiring Manager will take action by selecting the appropriate reason code. This will trigger an email notification to the applicant when posting is filled.

The following process to move Applicants through the recruitment process is as followed:

1. Status changes are conducted by selecting the Take Action on the Job Application button at the top right of the Applicant page.

2. Following completion of the phone interview, Hiring Manager will move the status of the Applicant(s) to
   a. If interested in an applicant, move to “in-person interview” status.
   b. If NOT interested in an applicant, move to “phone interviewed, not selected” and assign the appropriate reason code. This will trigger an email notification to the applicant when the posting is filled.

3. The Hiring Manager will review the interview feedback.
   a. If interested in an applicant, the Hiring Manager will schedule an In-Person interview with the Applicant. To accomplish this action, the Hiring Manager moves the Applicant Status to “In Person Interview.”
   b. If NOT interested in an applicant, the Hiring Manager will take action on the application to move it to an Interviewed not selected and assign the appropriate reason code. This will trigger an email notification to the applicant when the posting is filled.

4. The Hiring Manager will conduct the in-person interview.
   a. If interested in an applicant, the Hiring Manager will move the applicant status to “Finalist” status will trigger a link to “Start Hiring Proposal” on the Applicant screen.
   b. If interested in an applicant, the Hiring Manager may move the applicant status to “Interviewed On-hold”
   c. If NOT interested in an applicant, the Hiring Manager will take action on the application to move it to an Interviewed not selected and assign the appropriate
reason code. “phone interviewed, not selected” and assign the appropriate reason code. This will trigger an email notification to the candidate.

5. The final step will be to take action to “Start Hiring Proposal” on the Finalist. If more than one applicant is marked as a Finalist, the Hiring Manager can only select one candidate on which to start the Hiring Proposal.
The SCU Online Recruitment System allows Hiring Managers and other users to conduct applicant “bulk transactions”, or those transactions that may apply to more than one applicant. Such cases may be for moving a set of applicants from one workflow state to another or for notifications that a position is filled. This functionality offers an efficient method for working with multiple applicants at one time.

**Additional Information – Bulk Transactions**

Navigate to the Applicants tab on the Job Posting. You may also navigate to all Applicants from the Applicants tab from the main menu.

In order to perform a bulk transaction, select applicants by clicking on the select box to the left of the applicant’s Full Name. To select all applicants, click in the select box at the top left, next to the title, Full Name. When done, click on the Actions button above the applicant listing, at the right of the screen.

**General Transactions**

“Ranking Criteria Questions” are associated with Search Committees evaluations. If you have chosen to use the Search Committee functionality, you may choose questions that have already been established with a template or a posting. Weights may also be associated so that favorable responses are “ranked” for the applicant.
If you would like to add a new ranking criterion to the Ranking Criteria Question, you may click on the orange “Add a Criterion” button at top of the question area. If your criterion is not available in the bank, you may type in a new criterion. Scroll to the bottom of the page and click “Add a new one”.

Once finished, select the orange “Next” button located at the bottom of the screen. Choose the gray “Previous” to navigate to the previous page, or “Save” to return at a later time and to save your entries.

Evaluate Applicants

ADD SCREEN SHOT #8

Hiring Manager and Search Committee Members will have an opportunity to evaluate applicants during the review process. Evaluative criteria may be established directly on the posting and responses from the Search Committee may be gathered and reviewed.

Hiring Managers and search committee chairs will have the ability to view the evaluative criterion and responses by the Search Committee team. Responses may be downloaded by selecting “Download Applicant’s Evaluations”. The ranking of all applicants who meet the basic qualifications will create the candidate flow log for this position.

Screening Questions

Human Resources may also Review Screening Questions Responses and download them by choosing this feature.

Export Results
The Export Results function allows Hiring Manager and Search Committee Chairs to export applicant information to Excel for further reporting. When selecting "Export Results", Excel will prompt you to Open the data in a new window, Save your data to a file or Cancel to terminate the transaction.

Export results will appear in an Excel file as seen below:

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Job Title</th>
<th>Combined Document</th>
<th>Application Date</th>
<th>Workflow State (Internal)</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDermott, Valerie</td>
<td>Administrative Assistant for the Apcos Center</td>
<td>-a rel=&quot;noreferrer noopener&quot; download_pdfs target=&quot;_blank&quot;&gt;Combined Document</td>
<td>July 18, 2015 at 11:30 am</td>
<td>Finalized (Selected)</td>
</tr>
<tr>
<td>Staff, HR Office</td>
<td>Staff, HR Office</td>
<td>Not generated</td>
<td>July 16, 2015 at 02:30 pm</td>
<td>Finalized (Selected)</td>
</tr>
</tbody>
</table>

Note that the exported information is based on your new or saved search results.