Applicant Screening and Creating A Hiring Proposal

PeopleAdmin User Guide

This guide is intended to assist hiring managers with reviewing applications, updating applicant statuses, recommending a candidate for hire, and creating the hiring proposal.

TEXAS ★ STATE
UNIVERSITY ®
The rising STAR of Texas

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Logging into People Admin

To log into the system:

o Go to: jobs.hr.txstate.edu/hr

o (Firefox is recommended but Chrome, Explorer, and Safari can be used)

o Click on **"Login with your Texas State ID here."** or **"SSO Authentication"**

o Do not input username and password.

o User will be re-directed to the Texas State Login to PeopleAdmin 7

o Login with NetID and Password

Use Applicant Tracking System Module

Use the Applicant Tracking System Module by clicking on the three blue dots in the top left-hand corner of the PeopleAdmin home page and switching over to the module if needed.
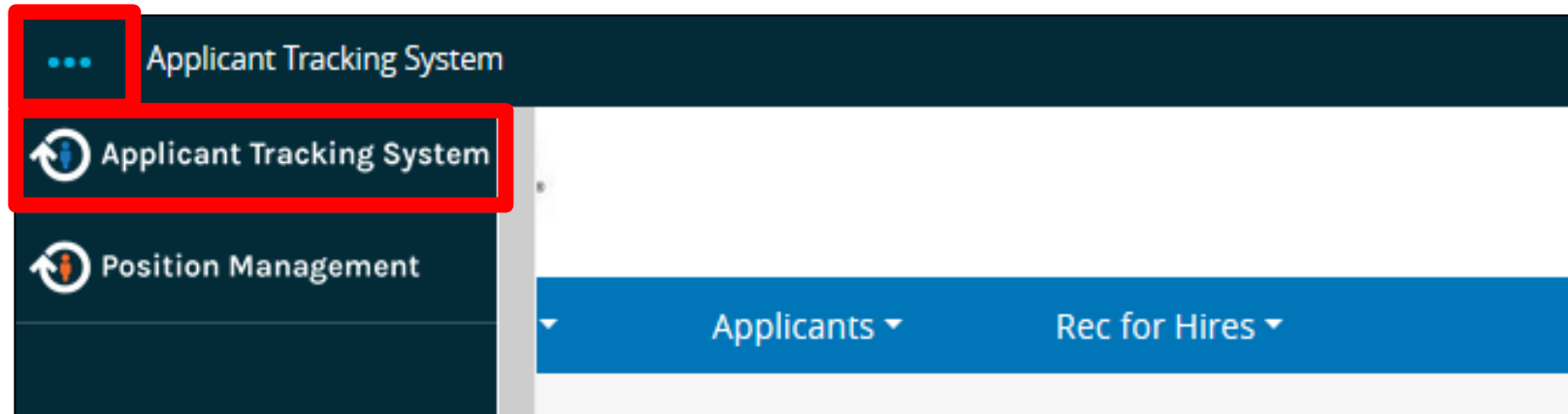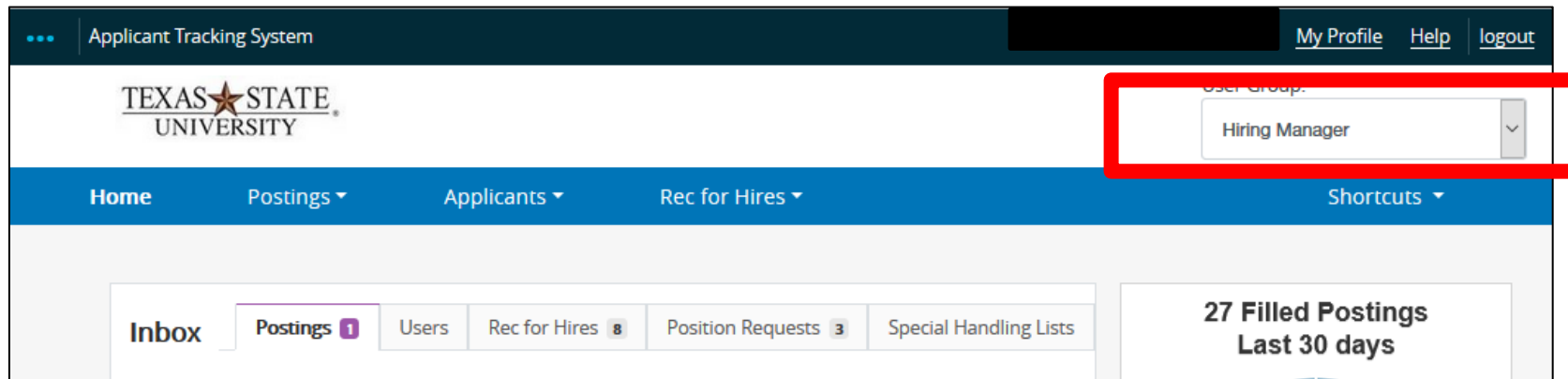
Change the User Group

Use the drop-down menu and select the Hiring Manager user group

Navigate to the Job Posting

There are two ways to see the job posting.

1. Navigate to Postings and Select Staff
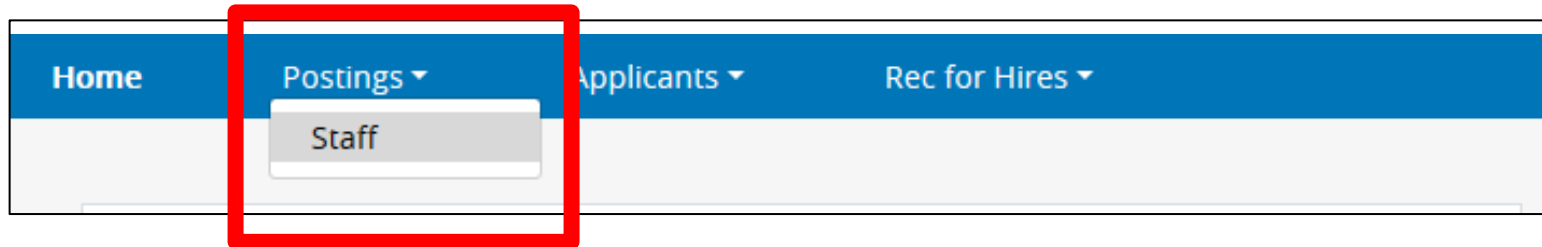
2. If the hiring manager added the posting to their Watch List, they will be able to find it in the "Watch List"
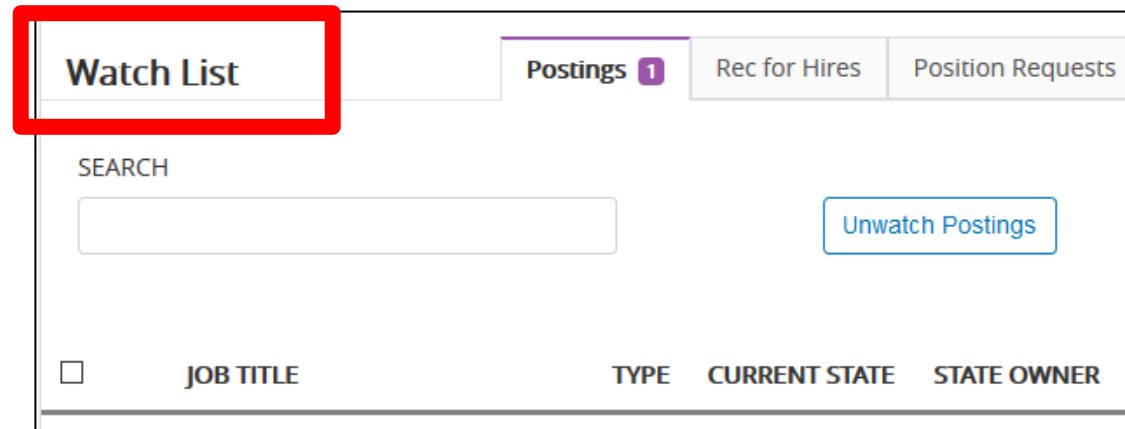
- Click on the link to the job posting

- Navigate to the "Applicants" tab in the job posting

Review Applicant Information

- Hiring managers may review the applications online by clicking on the applicant's name. This will open the applicant's application.
- The hiring manager may also print all of the applications and review the documents on paper.
  - Click the orange action button in the applicant tab and select Create Document PDF per Applicant. This action will create and open Adobe Reader. In Adobe Reader, the hiring manager may save and print applications.
  - Helpful tip: during the review, the Hiring Matrix can be prepared simultaneously as the hiring manager and/or search committee reviews the applications. Here is the link to the [Hiring Matrix](#) and [Guide](#)
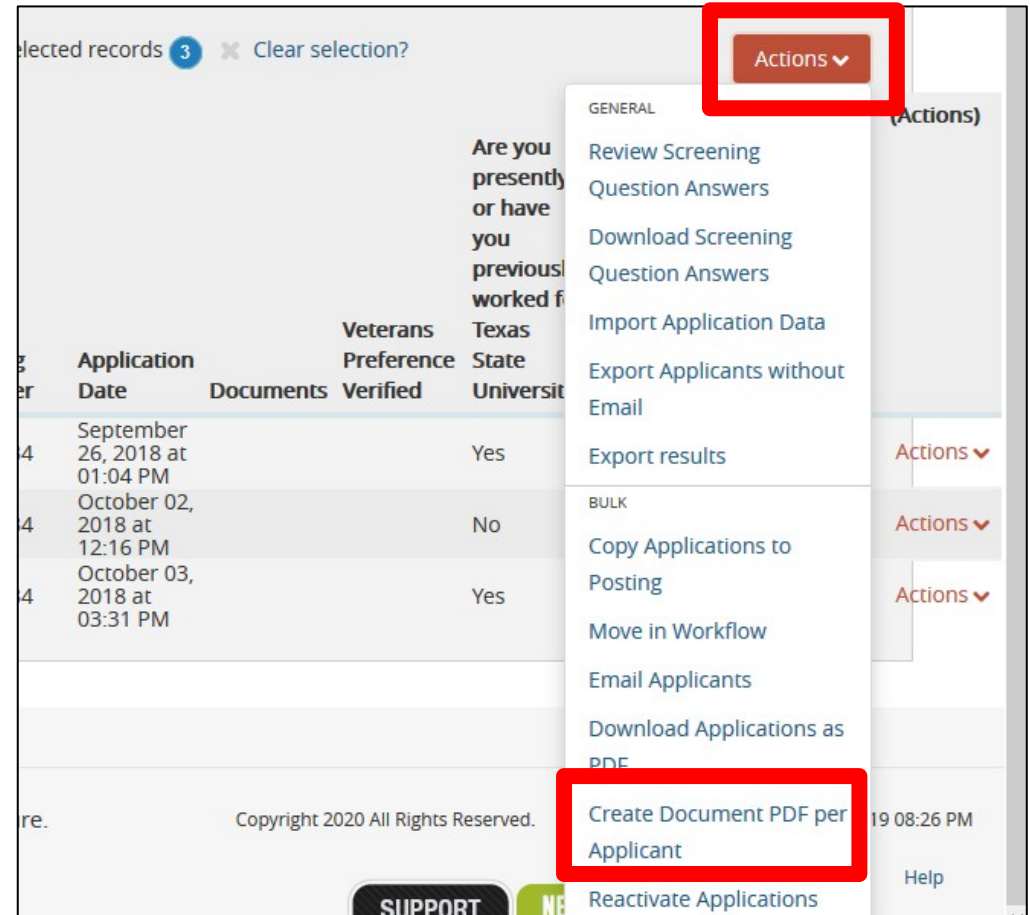
Update Applicant Statuses

There are two ways to update applicant statuses: individually per application or in bulk.

- The hiring manager may update individual applicant status as they review the application
    - Click on the applicant the last name and open the application
    - Click on the orange button "Take Action on Job Application" and select the workflow state from the list of actions

Take Action On Job Application ⌄

Keep working on this job application

WORKFLOW ACTIONS

Interview Pending (move to Interview Pending)

Not Hired (move to Not Hired)

Interviewed (move to Interviewed)

Interviewed - Not Hired (move to Interviewed – Not Hired)
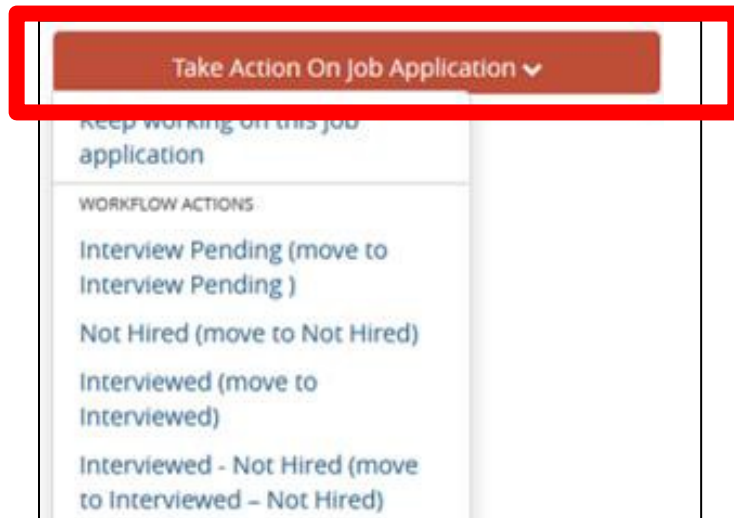
Selecting "Not Hired" will require a reason for not selecting the applicant.

Take Action ✕

Not Hired (move to Not Hired)

Reason (required)

Please select

Please select

Does Not Meet Required Qualifications

Met Required Qualifications

Met Required Qualifications, but Low Matrix Score

Other
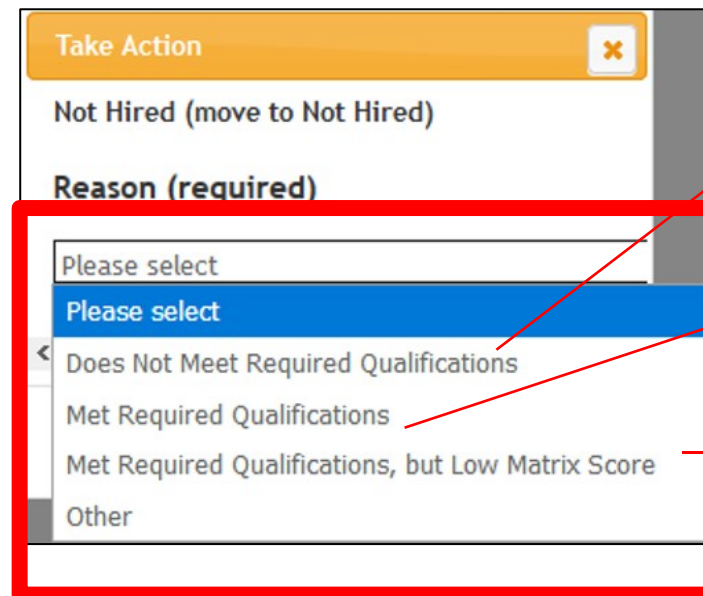
Selecting "Does Not Meet Required Qualifications" will require an explanation. This reason needs to match the Hiring Matrix scoring showing zero for the qualification.

Selecting "Met Require Qualifications" will require an explanation.

Selecting "Met Required Qual., but Low Matrix Score" will not require an explanation, however the Hiring Matrix will need to demonstrate the low score.

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Provide an explanation for the reason selected and click the "Submit" button.

Take Action

Not Hired (move to Not Hired)

Reason (required)

Does Not Meet Required Qualifications

Explanation:

Submit   Cancel

Helpful tip: Applicant workflow set up in the system:		
Interview Pending	No other entry needed. This action will keep the applicant in the applicant tab for further workflow actions.	
Not Hired	**Reasons**	**Explanation**
	Does not Meet Qualifications	Explanation needed. Hiring Matrix need to show zero for the qualification the applicant did not meet
	Met Required Qualifications	Explanation needed
	Met Required Qualification, but Low Matrix Score	No explanation needed but scores will need to be demonstrated in Hiring Matrix
	Other	Explanation needed
Interviewed	No other entry needed. This action will keep the applicant in the applicant tab for further workflow actions.	
Interviewed Not Hired	**Reasons**	**Explanation**
	• Job Offered But Turned Down • Failed to meet minimum/desired education or experience • Insufficient experience • Relatively weak in knowledge, skills, and abilities • Unfavorable reference check • Weak in verbal communications • Weak in writing skills • Interviewed, willing to accept as an alternate • Other	Explanation needed for any reason
Recommend for Hire	**Reason**	**Explanation**
	Recommend for Hire	Explanation needed

The hiring manager may also update all applicant statuses in bulk.

- Check the box next to the "Last Name" field and selecting all applicants, clicking on the orange "Actions" button, and selecting "Move in Workflow".

Update each applicant status by selecting the "Workflow State" from the drop-down menu.

For instructions on correcting an applicant status, jump to Slide 29.

Recommend One Applicant for Hire Individually or During the Bulk Workflow

Individually

Take Action On Job Application ▾

Keep working on this Job application

WORKFLOW ACTIONS

Interviewed – Not Hired (move

Recommend for Hire (move to Recommend for Hire)

Willing to Accept as an Alternate (move to Alternate)

Under Review by Hiring Manager (move to Under Review by Hiring Manager)

Bulk workflow

Under Review by Hiring Manager

Move to Recommend for Hire

Recommend for Hire ∨

Explanation:

Create a Hiring Proposal and Recommendation for Hire

Navigate to the applicant's application and select the link "Start Regular Staff Hiring Proposal"

Select the "Position Description"

Helpful tip: a pop up may appear to notify the hiring manager that the applicant has an existing Rec for Hire in process for another position.

Selected Position Description

This Rec for Hire is currently connected to the following Position Description:

• Systems Support

This Applicant already has one or more Rec for Hires in progress. Create this Rec for Hire?

If an employee is currently seated in this Position Description, they will be vacated upon approval of this Rec for Hire and the new employee will be seated.

OK   Cancel

If there an incumbent seated in the position being filled, a pop-up will notify the hiring manager that an employee is currently seated in the position and this action will vacate the incumbent and seat the new employee. (This is because the system will not allow two people to be seated in the same position.)

Select "OK"

Complete the Hiring Proposal form and click "Next".

Enter the reason why the hiring manager is selecting this candidate for hire. This reason needs to match the reason indicated in the hiring matrix.

Enter the Texas State NetID and ID. Hiring manager may request the department head for this information or if authorized may request for the NetID and ID

- Instructions

Hiring Proposal Documents

Save << Prev Next >>

PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
Hiring Matrix			Actions ▾
Contract Offer Recommendation (for Faculty)			Actions ▾
English Proficiency Form (for Faculty)			Actions ▾
Employment Verification Form			Actions ▾
Background Inquiry Release Form			Actions ▾
Additional Document			Actions ▾
Director Approval Memo (If applicable)			Actions ▾
Recommendation Letter #1			Actions ▾
Recommendation Letter #2			Actions ▾
Recommendation Letter #3			Actions ▾
Interview Questions for Staff Positions			Actions ▾
Faculty Start Up Approval			Actions ▾
Authorization for Employee Moving Expenses (Form AP-16)			Actions ▾

Attach documents, by selecting the "Action" link, and "Upload New".

- The required hiring proposal documents are the *Hiring Matrix, Two Employment Verification Forms, and the Background Inquiry Release Form*.

Then select "Next".

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Select the orange button "Take Action On Rec for Hire" and select "Send to Equity and Access" (Equity and Inclusion).
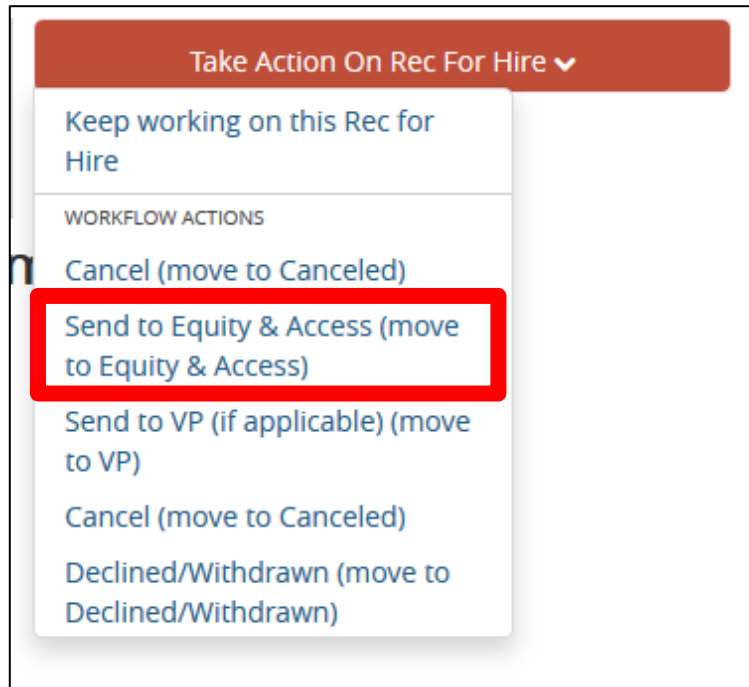
Enter a comment if needed and click "Submit"
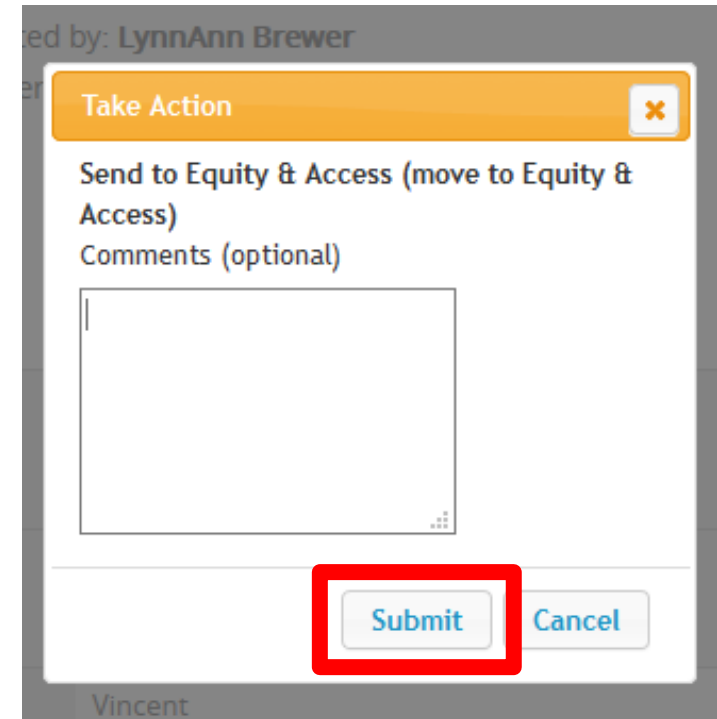
If a Rec for Hire has been returned because you need to correct the workflow state for an applicant, you will need to move them back to "Under Review By Hiring Manager," save changes, and refresh the page before updating their applicant status.

As an example: see steps below to update an applicant status from "Interviewed – Not Hired" to "Not Hired".

(1) Select the applicant; (2) select "Move in Workflow"; (3) select "Under Review by Hiring Manager"; (4) Save changes; (5) refresh the page

1. ☑ [redacted] 2020216 November 13, 2019 at 09:35 AM   No   Interviewed – Not Hired

2.
Copy Applications to Posting

Move in Workflow

Download Applications as PDF

Create Document PDF per Applicant

Reactivate Applications

3.
Select a workflow state...
Select a workflow state...
Interview Pending
Recommend for Hire
Alternate
Under Review by Hiring Manager
Move to Draft
Move to Hired
Move to Not Hired
Move to System Det Does Not Meet Minimum Qualifications
Move to Withdrawn
Move to Interviewed

4. Save changes   Cancel

5. (←) → ↻ ⌂

See next slide for steps 6-11...

Once the applicant is "Under Review by Hiring Manager"

(6) select the applicant again; (7) "Move in Workflow"; (8) select the updated workflow state; (9) select the appropriate reason; (10) save the changes; (11) refresh the page

6.

	Last Name	First Name	Posting Number	Application Date	Preference Documents	Texas State Verified	University?	Workflow State (Internal)
☑	⬛⬛⬛		2020216	November 13, 2019 at 09:35 AM			No	Under Review by Hiring Manager
☐	⬛⬛⬛		2020216	November 15, 2019 at 09:35 PM			Yes	Recommend for Hire

7.
Copy Applications to Posting

Move in Workflow

Download Applications as PDF

Create Document PDF per Applicant

Reactivate Applications

8.
Select a workflow state...

Select a workflow state...

Interview Pending

Not Hired

Interviewed

Interviewed – Not Hired

Move to Draft

Move to Recommend for Hire

Move to Hired

Move to System Det Does Not Meet Minimum Qualifications

Move to Withdrawn

Move to Alternate

9.
Please select...

Please select...

Does Not Meet Required Qualifications

Met Required Qualifications

Met Required Qualifications, but Low Matrix Score

Other

10.
Save changes Cancel

11.
← → ↻ ⌂

After saving changes and refreshing the page, search for inactive applicants and check that the workflow state has been updated.

| ☐ | ⬛⬛⬛⬛⬛⬛⬛ | 2020216 | November 13, 2019 at 09:35 AM | | No | Not Hired |

Helpful tip: If your applicants have disappeared, this means they've moved to an "inactive status." Select both "active" and "inactive" and click "search" to view all applicants.

To add a new column to the search results, select the column from the drop down list.

Saved Searches ∨ | [   ]   Search   🔍 Hide Search Options ∨

Add Column: Add Column

Active/Inactive: ×Inactive   ×Active

Draft Application?:   ☐

Workflow State: Workflow State

Confirmation Number: [   ]

Applicant ID: [   ]

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The Applicant Review, Request to Hire, and Staff Hiring Proposal are all done!

Congratulations and Great job!

- Talent Acquisition will process the background check and the hiring manager will receive an automated email message notifying them that they can move forward with an official offer of employment offer.
- It's recommended to notify the candidate of where they stand in the process by sending them the "Recommended for Hire" letter and let them know that the official offer is pending final approval.

Helpful tips: In the "History" of the Hiring Proposal, Hiring Managers may view the full history of the proposal's workflow, notes from approvers, and copies of email notifications, including the "Approval to make employment offer" email message.

To access the approval email message, see steps below:

1.

Summary	History	Settings

Workflow | Notes | Emails

✉️ **Emails Sent**   January 13, 2020 at 11:17 AM

2.
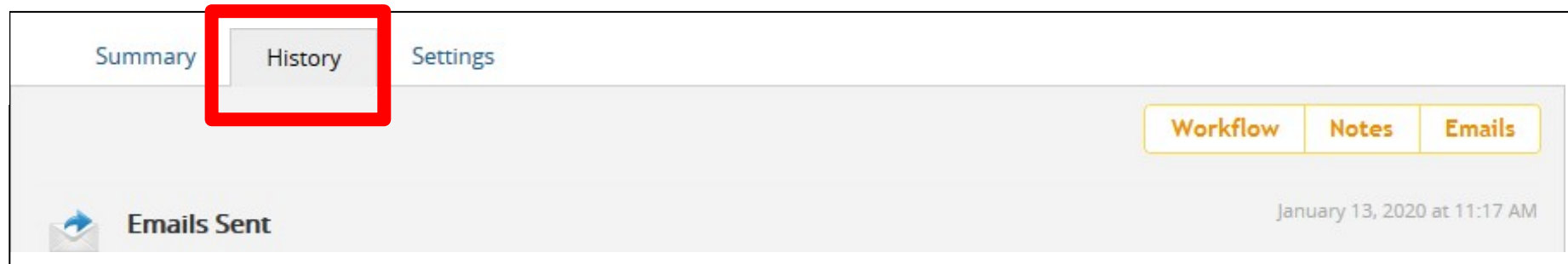
Emails Sent — July 06, 2020 at 02:19 PM
"Approval to Make Employment Offer " sent to 2 users

Emails Sent — July 06, 2020 at 02:19 PM
"Hiring Proposal Status Update " sent to 4 users

Email Sent — July 06, 2020 at 02:18 PM
"Hiring Proposal Status Update " sent to 1 user

Performed "Override"
Position Request status changed to "HR Employment – Offer Pending". It has been in this state for 21 hours. — July 06, 2020 at 02:18 PM (CDT)

completed 7/6/20

3.

Home	Postings ▾
☆	
Addressee	**Actions**
@txstate.edu	📄
txstate.edu	📄

Click the icon to view the "Approval to Make Employment Offer" email message.

4.

Hello,

The pre-employment checks and testing for the above candidate has been completed and you can move forward with the official employment offer. Per policy 04.04.15, newly hired benefits eligible staff must always start on a Monday and attend N.E.W, otherwise VP approval must be given for an out of cycle hire.

If the candidate is an existing regular Texas State employee, please notify hr@txstate.edu of their effective start date. NSNR employees can only start on the first of the following month.

Please see the following link to begin onboarding the new hire. https://www.hr.txstate.edu/manager-toolkit/onboarding.html

Thank you,

Talent Acquisition Team

Talent Acquisition Customer Service Survey

Next Steps

- The hiring department must wait for HR's final approval before making the official offer, in the meantime, the hiring manager can send the candidate a Recommended for Hire letter to let them know where they stand in the process. (See sample employment letters for applicant notifications.)

- PeopleAdmin sends an email to the hiring manager to notify them that they can extend the official offer of employment with the subject line, "Approval to Make Employment Offer" from hr@txstate.edu.

Helpful tip: To check the status of the Hiring Proposal in the workflow, see "Current Status"

- The department will notify HR whether the offer was accepted and the new employee's official start date

- The Hiring Manager will review the [Hiring Manager Checklist](#) and complete the I-9, PCR, and register the employee for N.E.W.

- Register employees for N.E.W. by using the [N.E.W. Administration Registration Form](#)

For assistance please contact the Office of Human Resources at 5.2557 or email hr@txstate.edu.