

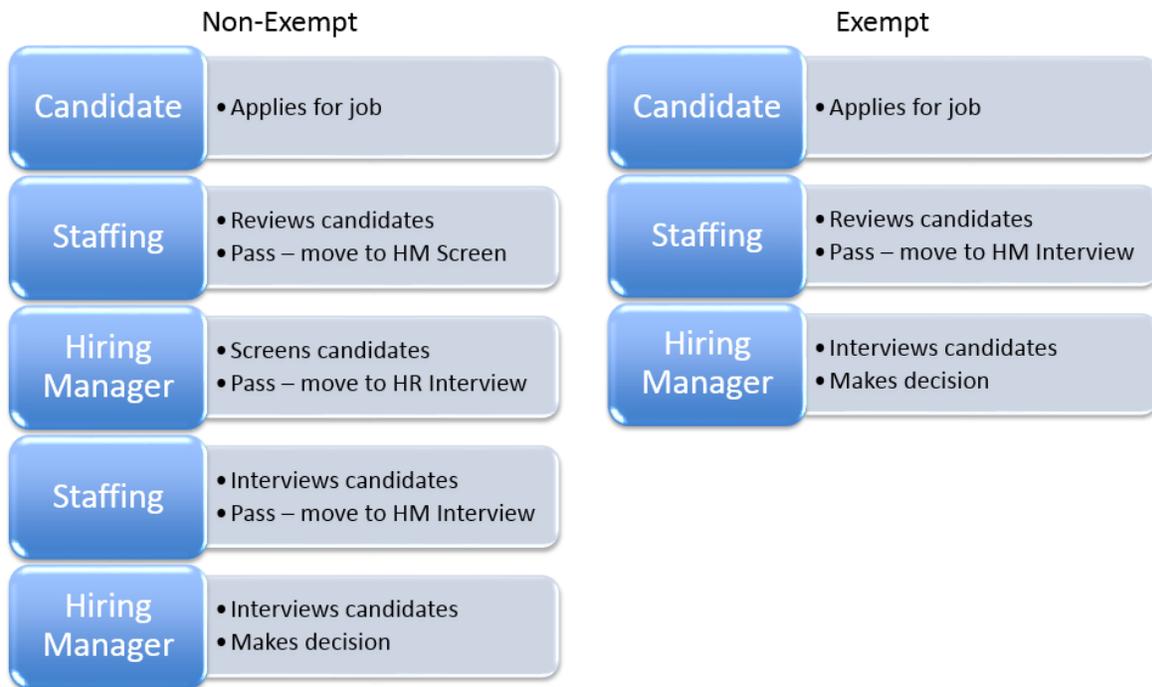
## Candidate Management

Once a requisition is entered and approved, Human Resource Services (HR) will post the job on the University of Maryland, Baltimore Jobs site and the school specific jobs page. Once applicants apply, HR will screen the applicants and then forward the candidates that pass the HR screen on to the Hiring Manager.

Candidate Management is the process where selected candidates will move through the various steps to determine if they are the right candidate for the job. Ultimately, all candidates will either be hired for a position or will be dispositioned once it's determined they are no longer being considered.

### Candidate Workflow

At a very high level, the basic workflow for a non-exempt vs an exempt position is as follows:



The primary feature that moves candidates through the respective workflow is the Step/Status process.

### Understanding Step/Status and Reason

Candidate Management is, again, the process where selected candidates will move through the various Steps to determine if they are the right candidate for the job. Within each Step are various Statuses. The Status feature is a hierarchy that a candidate will move through until the completion Status (marked by an "\*" in the Status drop down menu) is reached – which means the candidate either moves to the next Step or they are rejected and no longer advance. If rejected, a reason (disposition) must be selected.

For example, a Step in the workflow is the **HM (Hiring Manager) Interview**. Once the candidate interviews with the Hiring Manager, there are 5 possible Statuses that the Hiring Manager can select:

- Under Consideration – the Hiring Manager hasn't made a decision yet but is still considering the candidate.
- Selected Finalist \* - the "\*" means that this is a final Status. If selected, the candidate will move on to the Offer Step.
- Final Candidate #2 – is still in consideration for the position depending on whether the Selected Finalist moves on to take the position or not. Once the position is filled, the candidate must be dispositioned if they are not selected.
- Final Candidate #3 – is still in consideration for the position. Once the position is filled, the candidate must be dispositioned if they are not selected.
- Rejected \* - the "\*" means that this is a final Status. If selected, the candidate is no longer being considered and a reason (disposition) must be selected. HR will send the appropriate correspondence.

The Statuses will differ based on the Step the candidate is on.

Anytime a candidate is moved to the next Step, a green check mark will appear in the Status column and anytime a candidate is rejected (they will no longer advance), a red circle will appear. An example is displayed below:

|                            |   |              |   |
|----------------------------|---|--------------|---|
| Mayer, Christopher (11184) |  | HM Screen    | HM Screen - Rejected                             |
| Kerns, William (11202)     |  | HR Interview | HR Interview - Rejected                          |
| Rully, Elizabeth (11186)   |  | HR Interview | HR Interview - Interview Successfully Completed  |

## Reviewing Candidate Files

Once candidates for a requisition have been screened and forwarded to the Hiring Manager, they can be accessed a couple different ways.

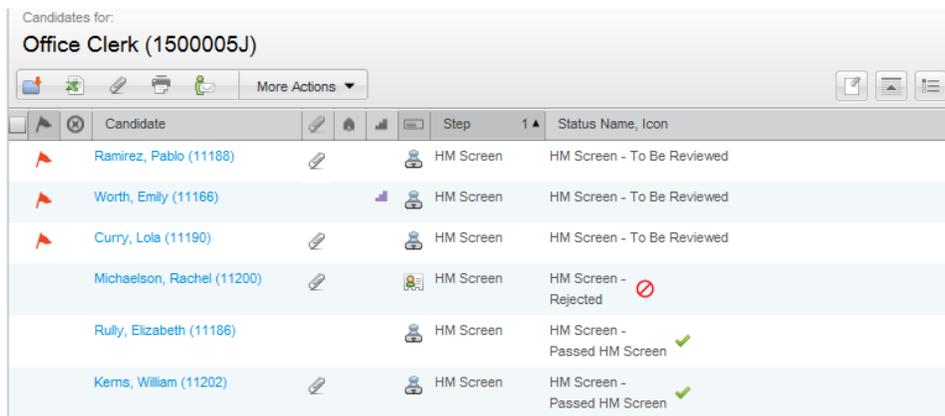
### *By Candidate*

To view all candidates for all jobs, on the **Recruiting Center** home page, select the **View Candidates** option. All candidates for all open requisitions that the user is associated with will appear.

### *By Requisition*

To view candidates by requisition, on the **Recruiting Center** home page, select the **View Requisitions** option. The **Candidate Count** column displays the number of candidates who have applied and passed the HR Screen Step.

Click the **Candidate Count** number for the requisition in question. The following window will appear:

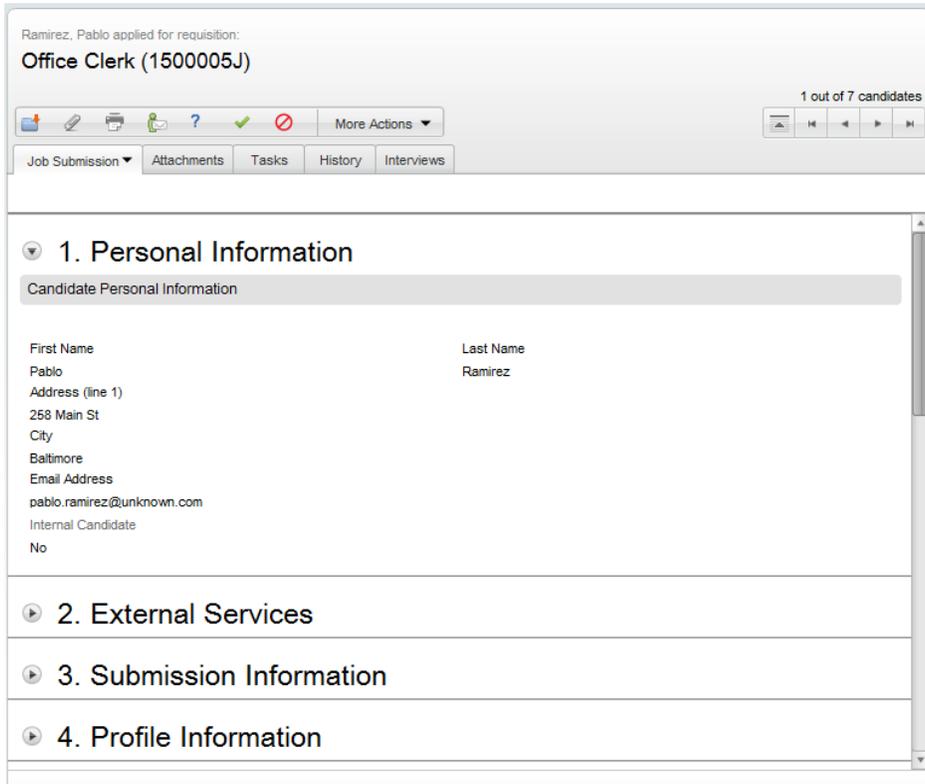


| Candidate                  | Step      | Status Name, Icon            |
|----------------------------|-----------|------------------------------|
| Ramirez, Pablo (11188)     | HM Screen | HM Screen - To Be Reviewed   |
| Worth, Emily (11166)       | HM Screen | HM Screen - To Be Reviewed   |
| Curry, Lola (11190)        | HM Screen | HM Screen - To Be Reviewed   |
| Michaelson, Rachel (11200) | HM Screen | HM Screen - Rejected         |
| Rully, Elizabeth (11186)   | HM Screen | HM Screen - Passed HM Screen |
| Kerns, William (11202)     | HM Screen | HM Screen - Passed HM Screen |

This is the candidate list for the Office Clerk position. To review the various columns and icons, from left to right:

- **Flag** - A red flag denotes that the candidates file has not been viewed.
- **Candidate** - The candidate's name, which will link to their file.
- **Paper Clip** - Means there is a file attachment.
- **House Icon** - Whether the candidate is internal or not.
- **Bar Graph** - The candidate has applied to other positions. Only positions that the user is associated with will be displayed.
- **Step** - The step the candidate is presently at. In this example, all the candidates are at the "HM Screen" Step.
- **Status** - Steps often have more than one status. Certain statuses have corresponding icons that allow the user to quickly determine where they are in the process. The red circle means the candidate has been rejected and will not continue. A green check mark means the candidate has reached and completed the last status for the corresponding step.

To review a candidate’s application and other information, click on the candidate’s name in the **Candidate** column. The following window will appear:



Ramirez, Pablo applied for requisition:  
**Office Clerk (1500005J)**

1 out of 7 candidates

More Actions

Job Submission Attachments Tasks History Interviews

1. Personal Information

Candidate Personal Information

|  |                      |
|--|----------------------|
| First Name<br>Pablo                        | Last Name<br>Ramirez |
| Address (line 1)<br>258 Main St            |                      |
| City<br>Baltimore                          |                      |
| Email Address<br>pablo.ramirez@unknown.com |                      |
| Internal Candidate<br>No                   |                      |

2. External Services

3. Submission Information

4. Profile Information

- The **Job Submission** tab is the default tab. This is the candidate’s application. The arrow on the right of the tab will provide a shortcut to the various sections of the application.
- The **Attachments** tab will display any attachments (resume, cover letter, etc.) that the candidate included.
- **Tasks** and **History** will display any tasks and history associated with this candidate.
- The **Interviews** tab is not presently used.

**To Change a Step/Status**

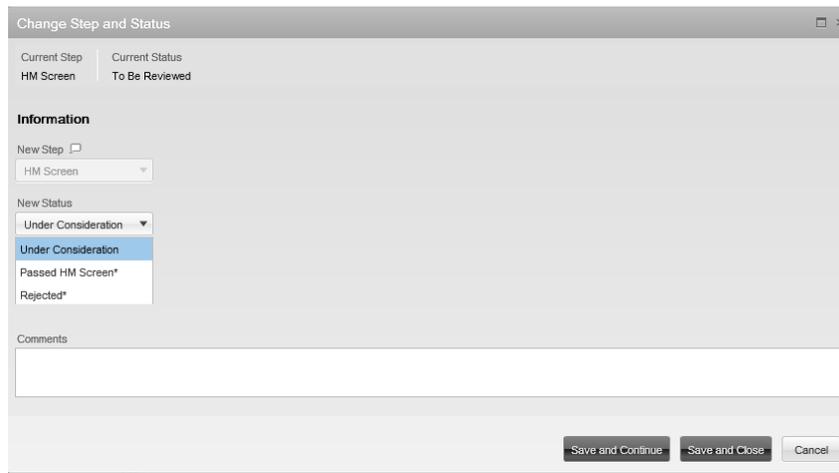
Once a decision is made, there are three ways that the Step and Status can be updated.

1. From within a candidate’s file (as seen above), click one of the three Status short-cut icons.



- a. Blue Question Mark – moves the candidate to Under Consideration.
- b. Green Check Mark – moves the candidate to the next Step.
- c. Red Circle – rejects the candidate and automatically prompts for a reason (disposition).

2. From within a candidate’s file (as seen on the previous page), click the **More Actions** drop-down menu and select **Change Step/Status**. The following window will appear:



The Current Step and Current Status will be displayed in the upper left-hand corner.

Under the **New Status** drop-down menu are the available Statuses for the present Step. Again, any Status with an “\*” will either move the candidate to the next Step or will end their advancement.

Once the appropriate selections are made, click **Save and Close**. This will automatically move the candidate to the next step when appropriate. Anytime a candidate moves to a new step, e-mails to the appropriate people involved will be sent informing them that a candidate has moved.

3. Another way a candidate's Step/Status can be changed is from the Candidate List, shown below:

Candidates for:  
**Office Clerk (1500005J)**

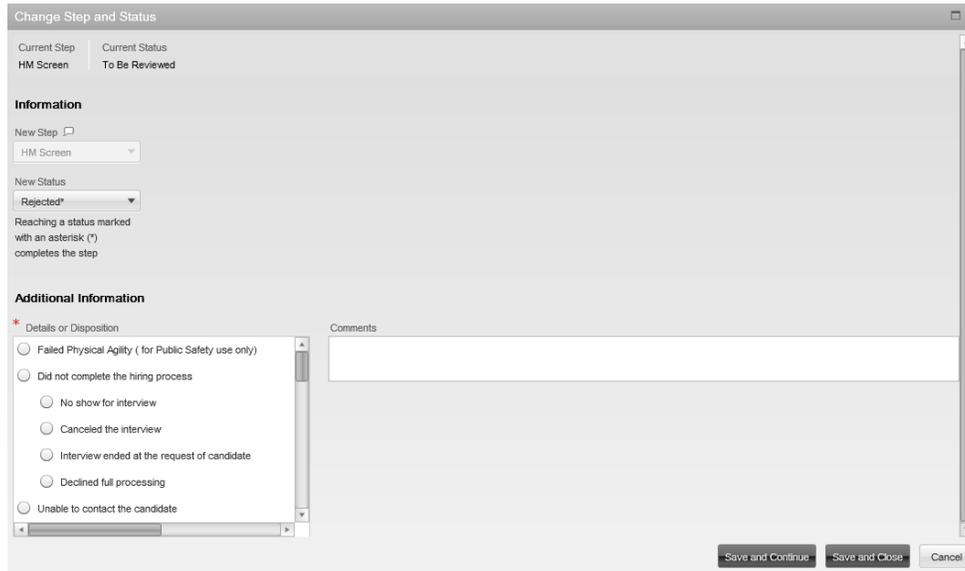
| <input type="checkbox"/> | Candidate                  | Step         | Status Name, Icon  |
|--------------------------|----------------------------|--------------|--|
| <input type="checkbox"/> | Michaelson, Rachel (11200) | HM Screen    | HM Screen - Rejected                             |
| <input type="checkbox"/> | Worth, Emily (11166)       | HM Screen    | HM Screen - Rejected                             |
| <input type="checkbox"/> | Mayer, Christopher (11184) | HM Screen    | HM Screen - Rejected                             |
| <input type="checkbox"/> | Kerns, William (11202)     | HR Interview | HR Interview - Rejected                          |
| <input type="checkbox"/> | Rully, Elizabeth (11186)   | HR Interview | HR Interview - Interview Successfully Completed  |
| <input type="checkbox"/> | Curry, Lola (11190)        | HR Interview | HR Interview - Interview Successfully Completed  |

When a candidate's name is rolled over (Elizabeth Rully in the screenshot), a checkbox will appear to the left of their name. Once the box is checked, the user can then go to **More Actions** and **Change Step/Status**.

An advantage to this method is that it allows the user to select more than one candidate at a time. If there are multiple candidates whose updated Step/Status will be the same, they can all be done at one time.

## Dispositioning a Candidate

When a candidate’s Status is changed to “Rejected”, it will be necessary to provide a reason. This is referred to as “dispositioning” the candidate. On the **Change Step and Status** screen, once “Rejected” is selected, the **Additional Information** window will appear, as shown below:



The appropriate selection should be made.

*Remember:* If any candidates were moved to Final Candidate #2 or #3, once the position is officially filled, these candidate’s must be dispositioned appropriately.

Once a reason is selected, select **Save and Close**. HR will send the appropriate correspondence.

### Selecting a Finalist

Once interviews have been completed and a decision has been made, Taleo gives the capability to select up to 3 finalists – the selected candidate and then a 2<sup>nd</sup> and 3<sup>rd</sup> finalist.

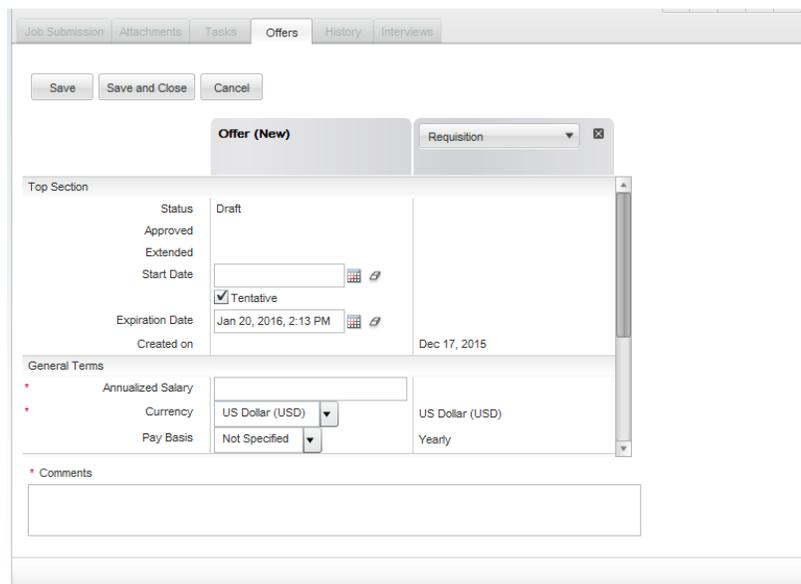
Through the Change Step/Status process, the selected finalist will be chosen and will be moved forward to the Offer step.

### Creating an Offer

From the Candidate List page, select the candidate’s name for which an offer will be extended to. Once the candidate file is open:

- Select **More Actions**.
- Select **Create Offer**.

The Offer tab will open, as seen below:



It will be necessary to enter/select the following data:

- **Start Date**
- **Expiration Date** (of the offer) – it is recommended to do it no longer than one week out.
- **Annualized Salary**
- **Currency** - defaults to US Dollars.
- **Letter Used** – using the **Create** button, select an offer letter template.
  - The letter cannot be edited by the hiring manager. If any changes need to be made, the Staffing Specialist will be able to make edits.

- **PCBU for Background Check**
- **Project ID**
- **Owner ID**
- **Program**
- **Fund**
- **Comments**

Once all the data is entered, select **Save and Close**.

On the Candidate File page, under **More Actions**, select **Request Approval**.

The **Request Approval** window will open. The staffing specialist should be listed as the approver. Comments are required. Once entered, click on **Done** and the offer will be forwarded to the staffing specialist.

The staffing specialist will handle the approval, background check and preparing the offer. At this point, the staffing specialist and hiring manager will need maintain contact outside of Taleo.

Once the offer is approved, the specialist will let the hiring manager know that the manager can make a verbal offer. Once the candidate makes a decision, the hiring manager will inform the specialist and they will send the offer letter.

Once the candidate accepts, any other finalists will need to be properly dispositioned by the hiring manager.