

Quick Reference Guide: Rating and Routing Applicants

Instructions: Use the following steps to **Rate and Route** applicants for classified staff, non-classified staff, and faculty in PeopleAdmin 7.

1. Log into the **Applicant Tracking** module

Note: Ensure that the usergroup is listed as either Initiator, Reviewer, or Approver

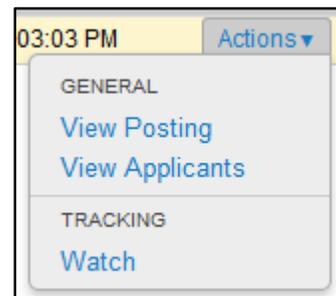


2. Hover over the **Postings** tab, and choose the appropriate selection



3. Click on the working title of the posting, and navigate to the **Applicant** tab; another way to access the applicants from this screen would be to hover over the **Actions** link and click **View Applicants**

<input type="checkbox"/>	Working Title	Posting Number
<input type="checkbox"/>	Construction Coordinator	C00013P



4. Change the status to **Applicant Reviewer**

5. Click on the link for the first name of the applicant

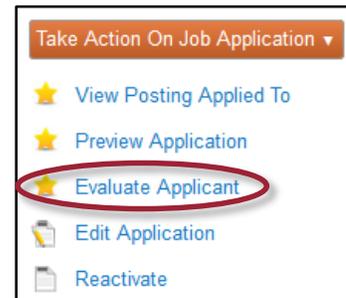
Applicant First Name	Applicant Last Name	Posting Number
----------------------	---------------------	----------------

5. If **Evaluate Criteria** was not used, skip to **Step 6**. If **Evaluative Criteria** was used, follow these steps:

a. After reviewing the requested application materials, on the right hand side of the screen, choose the option to **Evaluate Applicant**

b. Follow the instructions to rate the candidate; if desired, leave a comment in the Comments section

Note: Comments must be appropriate as they cannot be edited or deleted.



6. After all of the requested applicant materials have been reviewed, hover over **Take Action on Job Application** and choose the option **Rate Applicant (move to Rated Applicant)**



*Note: To return to view all applicants, either press the back button or use the links below the **Postings** tab to navigate back to the **Applicant Review***



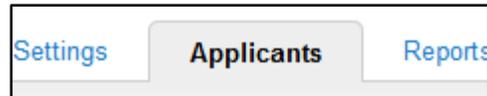
7. A prompt will follow requesting that the Applicant be rated with a reason code; ensure the most accurate reason code is chosen

A screenshot of a "Take Action" dialog box. The title is "Rate Applicant (move to Rated Applicant)". Below it is the label "Reason (required)". A dropdown menu is open, showing "Please select" at the top, followed by three options: "A - Met all minimum and preferred qualifications", "B - Met all minimum and some preferred qualifications", and "C - Met all minimum but no preferred qualifications". A note at the bottom of the dropdown reads: "Note: Please contact Human Resources if you feel the applicant did not meet the minimum qualifications." At the bottom of the dialog box are "Submit" and "Cancel" buttons.

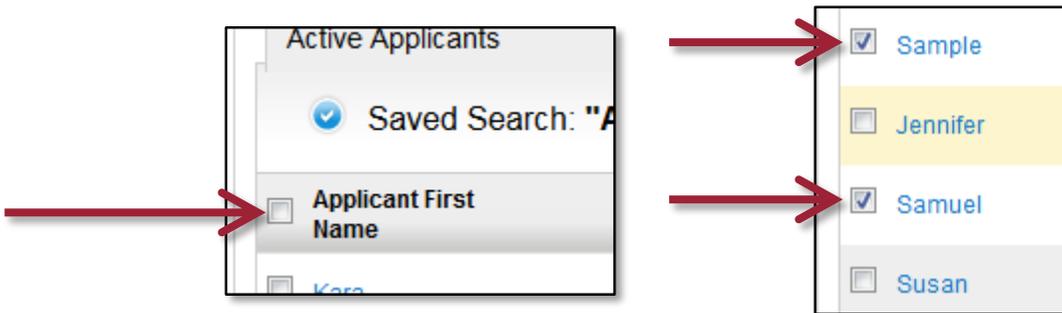
➤ **Directions for Bulk Edits**

To evaluate more than one applicant at a time, follow these steps:

1. Navigate to the **Applicants** tab and ensure that the names of the applicants that will be edited are visible



2. To select all Applicants, click the check box next to **Applicant First Name**, or to select individual applicants, check the boxes next the first names of the applicants to edit

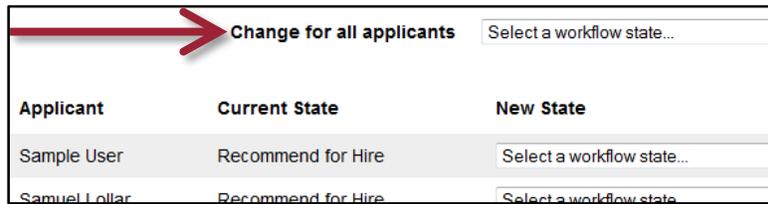


3. Hover over the **Actions** button, and choose the option under the **BULK** title **Move in Workflow**



4. On the **Bulk Workflow Status Change** page, there will be a drop down menu with options to change the status for all applicants, as well as the option to change the status for each individual applicant selected, make the changes desired

Note: *If applicants are in the same work flow state, they can be changed to the same status by using the **Change for all Applicants** drop down menu. If the applicants have differing **Current States**, that option will not be available and the change will need to be made to the **New State** for each individual applicant.*

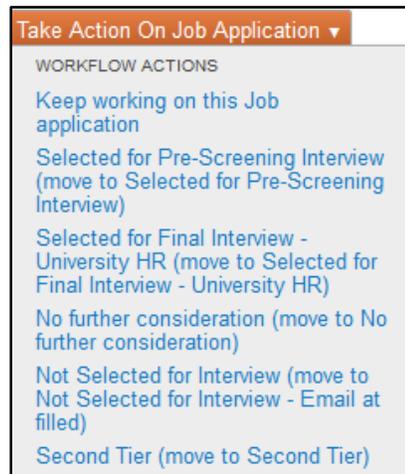


Applicant	Current State	New State
Sample User	Recommend for Hire	Select a workflow state...
Samuel Lollar	Recommend for Hire	Select a workflow state...

5. Click **Save changes** or **Cancel** to return the **Applicant** tab



8. Hover over the **Take Action on Job Application** menu and choose the option that best fits the status of the applicant



Definition of workflow Actions:

- **Keep working on this Job application:** Choose this option to add a comment.
- **Selected for Pre-Screening Interview (move to Selected for Pre-Screening Interview):** Choose this option if a phone screening, Skype screening, proficiency testing, or other method of pre-screening will be completed before the final interview. Approval does not need to be obtained for University positions when this option is chosen.
- **Selected for Final Interview - (move to Selected for Final Interview - University HR):** Choose this option once the final top tier candidates have been selected to request the final interview.
- **No further Consideration (move to No further consideration):** Choose this option for applicants who meet the minimum qualifications, however they will no longer be considered at any further point during the review process. An email will be generated to the applicant by OEOC if minimum qualifications are not met informing them that they will not be considered for the position.

Note: Once approval is given, these applicants will no longer be available for additional interview requests.

- **Not Selected for Interview (move to Not Selected for Interview - Email at filled):** Choose this option if you do not want to interview the applicant and do not wish to use them as a second tier, however they will remain in the pool and will not be notified until the posting is marked as filled. These applicants will be available for consideration for additional interview requests.
- **Second Tier (move to Second Tier):** Choose this option for applicants that would be the 'second choice' if a viable candidate for interview is not identified in the initial interview request.

9. Confirm with HR that the posting is closed/removed from the web

10. Once the request for interview has been submitted, HR and OEOC will review the applicant pool. If approved, OEOC will update the applicant status to **Approved for Interview**. If there are questions, OEOC will return the applicants to return to Department for further review.

A green bar, as shown below, means the applicants has successfully been routed for review. If a red bar appears, please read the message to address the errors.

 **Application was successfully transitioned**