

Managing Applicants

Guide to Manage Applicants through to Hiring Proposal

COLLEGE OF WILLIAM AND MARY

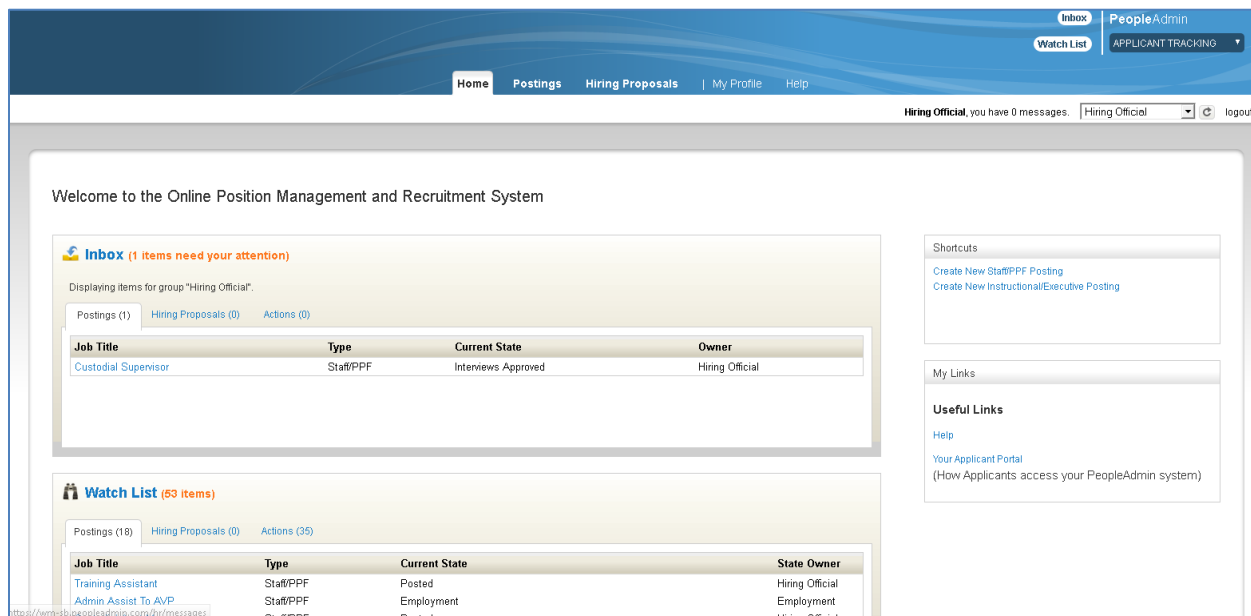
November 1, 2012
Human Resources

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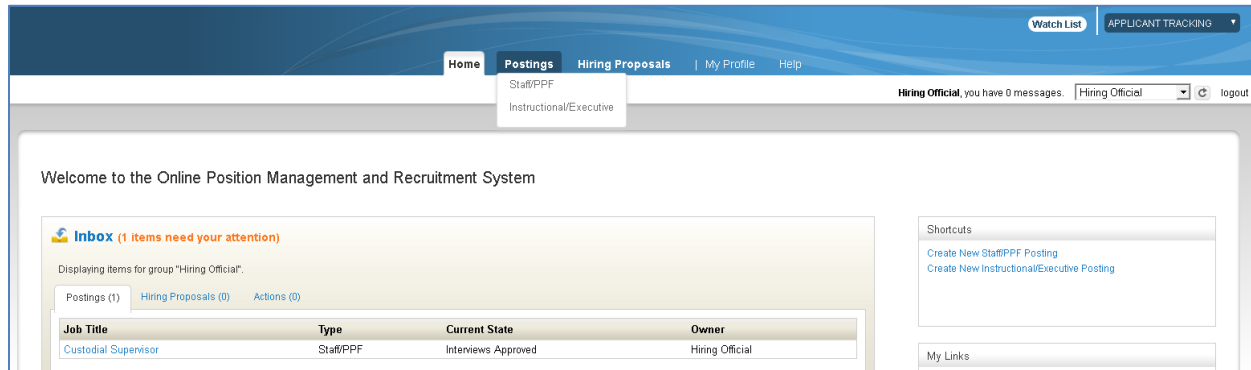
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Managing Applicants

To begin login to the jobs site at <https://jobs.wm.edu/hr> to view your Home page with your Inbox and Watch List.



Hover over Postings to select posting type to view either Staff/PPF or Instructional/Executive.



Managing Applicants (continued)

The postings assigned to your user account will be listed. This view can be customized according to your preferences. Hover over the [Actions](#) to view the posting and the applicants,

Staff/PPF Postings

Ad hoc Search (29 Items Found) Save this search?

Position Title	Active Applications	Posting Number	Department	Job Open Date	Job Close Date	Last Updated	Workflow State	(Actions)
Academic Dept Admin	4	StaffPPF_040364	Music Dept - 3KC210	10/15/2012		October 16, 2012 at 12:20 pm	Posted	<ul style="list-style-type: none"> GENERAL View Posting View Applicants TRACKING Stop Watching
Assoc Dean for Career Services	4	StaffPPF_040365	Law School Operations - 3N1000	10/15/2012		October 16, 2012 at 12:24 pm	Posted	
Custodial Supervisor	1	StaffPPF_040363	Plant Administration - 951100	10/05/2012	10/08/2012	October 09, 2012 at 09:41 am	Interviews Approved	
Administrative Staff Assistant	3	StaffPPF_040362	VP University Development Office - 610000	10/01/2012		October 01, 2012 at 03:19 pm	Posted	

Actions

- GENERAL
 - View Posting
 - View Applicants
- TRACKING
 - Stop Watching

Select View Applicants to be taken directly to the Applicants tab.

Posting: Academic Dept Admin (Staff/PPF) Edit

Current Status: Posted

Position Type: Staff/PPF Created by: Hiring Official

Department: Music Dept - 3KC210 Owner: Hiring Official

Summary | History | Settings | **Applicants** | Reports | Hiring Proposals | Associated Position Description

Active Applicant (Default) Screening Search

Saved Search: "Screening Search" (4 Items Found)

Full Name	Workflow State (Internal)	Degree Received:	Supplemental question Score	Veteran Question (VQ1):	Veteran Question (VQ2):	Veteran Question (VQ4):	Veteran Question (VQ5):	(Actions)
A, Susie	Under Review by Manager		8.0	Yes	Yes			Actions
Bee, Honey	Under Review by Manager		6.0	Yes	Yes	No	No	Actions
Aikman, Troy	Under Review by Manager	HS, BS	8.0	Yes	No	No	No	Actions
Kay, Mary	Under Review by Manager	HS, Bachelor's degree	3.0	No	No	Yes	No	Actions

Managing Applicants (continued)

At this screen, click on the Actions link to be able to view the application for each individual applicant.

Active Applicant (Default) | Screening Search

Saved Search: "Screening Search" (4 Items Found) Actions

Full Name	Workflow State (Internal)	Degree Received:	Supplemental question Score	Veteran Question (VQ1):	Veteran Question (VQ2):	Veteran Question (VQ4):	Veteran Question (VQ5):	(Actions)
<input type="checkbox"/> A, Susie	Under Review by Manager		8.0	Yes	Yes			Actions
<input type="checkbox"/> Bee, Honey	Under Review by Manager		6.0	Yes	Yes	No	No	GENERAL View Application
<input type="checkbox"/> Aikman, Troy	Under Review by Manager	HS, BS	8.0	Yes	No	No	No	Actions
<input type="checkbox"/> Kay, Mary	Under Review by Manager	HS, Bachelor's degree	3.0	No	No	Yes	No	Actions

You can also click on the Actions button to be able to Evaluate Applicants, Download Applicants Evaluations, Review Answers to Supplemental Questions, Download Answers to Supplemental Questions and Export results.

Active Applicant (Default) | Screening Search

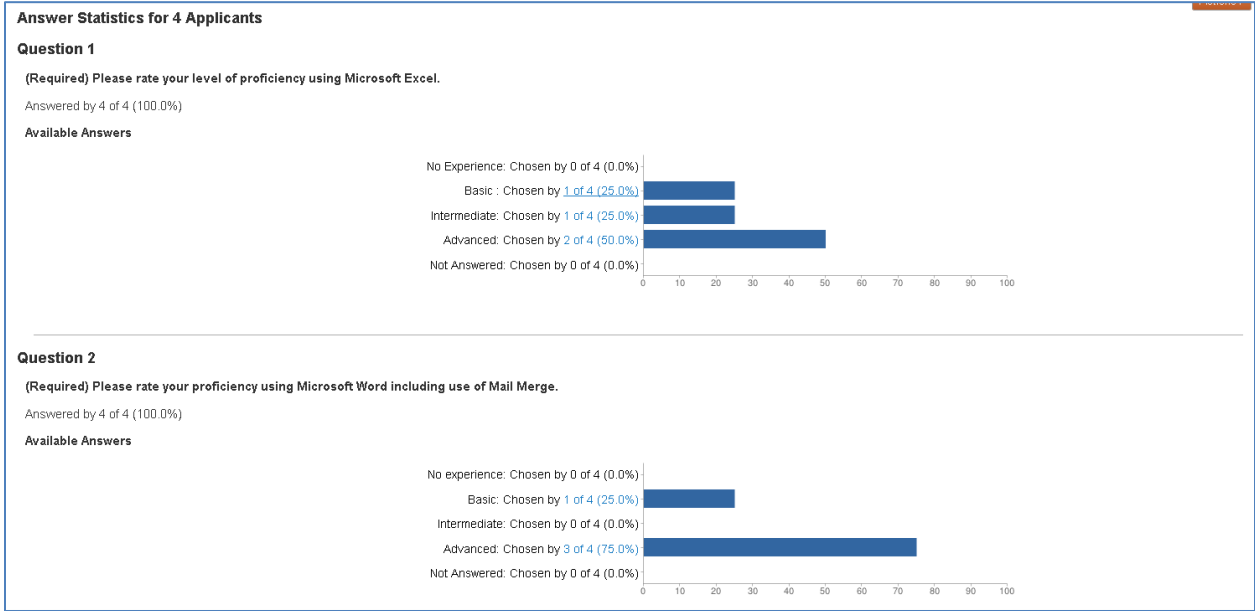
Saved Search: "Screening Search" (4 Items Found) Actions

Full Name	Workflow State (Internal)	Degree Received:	Supplemental question Score	Veteran Question (VQ1):	Veteran Question (VQ2):	Veteran Question (VQ4):	Vete (VQ5)	(Actions)
<input type="checkbox"/> A, Susie	Under Review by Manager		8.0	Yes	Yes			GENERAL Evaluate Applicants Download Applicants Evaluations Review Supplemental Question Answers Download Supplemental Question Answers Export results BULK: Move in Workflow Download Applications as PDF Create Document PDF per Applicant
<input type="checkbox"/> Bee, Honey	Under Review by Manager		6.0	Yes	Yes	No	No	
<input type="checkbox"/> Aikman, Troy	Under Review by Manager	HS, BS	8.0	Yes	No	No	No	
<input type="checkbox"/> Kay, Mary	Under Review by Manager	HS, Bachelor's degree	3.0	No	No	Yes	No	

You can also Move applicants in the workflow in Bulk, Download applications as a PDF, and Create PDF document per applicant. Please note that downloading and creating PDF documents will take time to complete.

Review of Answers to Supplemental Questions

The answers to the supplemental questions can provide information directly from your applicants regarding their knowledge, skills and abilities to meet the requirements of your position. This information is displayed in a graph format and also on the Screening Search under “Supplemental Questions Score”.



Active Applicant (Default) | Screening Search

Saved Search: "Screening Search" (4 Items Found) [Actions]

Full Name	Workflow State (Internal)	Degree Received:	Supplemental question Score	Veteran Question (VQ1):	Veteran Question (VQ2):	Veteran Question (VQ4):	Veteran Question (VQ5):	(Actions)
A, Susie	Under Review by Manager		8.0	Yes	Yes			[Actions]
Bee, Honey	Under Review by Manager		6.0	Yes	Yes	No	No	[Actions]
Alkman, Troy	Under Review by Manager	HS, BS	8.0	Yes	No	No	No	[Actions]
Kay, Mary	Under Review by Manager	HS, Bachelor's degree	3.0	No	No	Yes	No	[Actions]

[GENERAL View Application]

Reviewing Applications

There are several ways to view the applicant materials. You can select the top box which will check all applicants and hover over the Actions link to View Application.

Full Name	Workflow State (Internal)	Degree Received:	Supplemental question Score	Veteran Question (VQ1):	Veteran Question (VQ2):	Veteran Question (VQ4):	Veteran Question (VQ5):	(Actions)
<input checked="" type="checkbox"/> A, Susie	Under Review by Manager		8.0	Yes	Yes			Actions
<input checked="" type="checkbox"/> Bee, Honey	Under Review by Manager		6.0	Yes	Yes	No	No	GENERAL View Application Actions
<input checked="" type="checkbox"/> Alkman, Troy	Under Review by Manager	HS, BS	8.0	Yes	No	No	No	
<input checked="" type="checkbox"/> Kay, Man	Under Review by Manager	HS, Bachelor's degree	3.0	No	No	Yes	No	

Home | Postings | Hiring Proposals | My Profile | Help

Hiring Official, you have 0 messages. Hiring Official | Logout

Postings / ... / Academic Dept Admin (Posted) / Applicant Review / Susie A Under Review by Manager

Job application: Susie A (Staff/PPF)
 Current Status: Under Review by Manager
 Application form: Staff/Hourly

Full name: Susie A
 Address: 123 Main Street, Suffolk, VA
 Username: SusieA
 Email: SUSIE@ZED.ZED
 Phone (Primary): 757-221-4000
 Position Type: Staff/PPF
 Department: Music Dept - 3KC210

Created by: Susie A
 Owner: Hiring Official

Take Action On Job Application ▾

- ★ View Posting Applied To
- ★ Preview Application
- ★ Evaluate Applicant

Search Results: Next

Summary | Recommendations (0 of 0) | History

Personal Information

First Name: Susie

This is a bread crumb trail that allows you to move back to other areas such as Applicant Review.

To move to the next applicant, select the **Search Results: Next**

This will allow you to view all applications and take action on the application by hovering over

the **Take Action On Job Application ▾** and choose one of the following:

Take Action On Job Application ▾

WORKFLOW ACTIONS

- Keep working on this Job application
- Pending Interview (move to Interview Pending)
- Not Under Consideration (move to Not Under Consideration)

Applicant Review

To individually review applicants and update their status, select the box next to the applicant name and hover over the Actions link and click View Application.

Full Name	Workflow State (Internal)	Degree Received:	Supplemental question Score	Veteran Question (VQ1):	Veteran Question (VQ2):	Veteran Question (VQ4):	Veteran Question (VQ5):	(Actions)
A, Susie	Interview Pending		8.0	Yes	Yes			Actions
Bee, Honey	Under Review by Manager		6.0	Yes	Yes	No	No	Actions
Alkman, Tim	Under Review by Manager	HS, BS	8.0	Yes	No	No	No	GENERAL View Application
Kay, Mary	Under Review by Manager	HS, Bachelor's degree	3.0	No	No	Yes	No	

Postings / ... / Academic Dept Admin (Posted) / Applicant Review / Susie A Interview Pending Search Results: Next

Job application: Susie A (Staff/PPF)
 Current Status: Interview Pending
 Application form: Staff/Hourly

Full name: Susie A
 Address: 123 Main Street, Suffolk, VA
 Username: SusieA
 Email: SUSIE@ZED.ZED
 Phone (Primary): 757-221-4000
 Position Type: Staff/PPF
 Department: Music Dept - 3KC210

Created by: Susie A
 Owner: Hiring Official

Take Action On Job Application ▼
 View Posting Applied To
 Preview Application
 Evaluate Applicant

Summary | Recommendations (0 of 0) | History

Personal Information

First Name: Susie

Hover over **Take Action On Job Application ▼** to move this applicant in the workflow.

Take Action [X]

Not Under Consideration (move to Not Under Consideration)

Reason (required)

Please select

- Applicant Declined Offer - Other
- Applicant Declined Offer - Salary
- Applicant did not complete application process - provide comment to explain
- Applicant did not have preferred qualifications
- Applicant was judged less qualified than candidate who received offer
- Applicant withdrew
- Application was incomplete
- Candidate requires a higher salary than authorized
- Did not meet minimum requirements - provide comment to explain
- Did not meet preferred qualifications
- Did not return call or did not show for interview
- Does not have required license or certificate - provide comment to explain
- First Alternate
- Interviewed previously for position
- Less effective interview than applicant hired
- Less relevant education and experience than other applicants
- Less relevant education than other applicants
- Less relevant experience than other applicants
- Not eligible to apply on internal posting

Screening the Applicant Pool

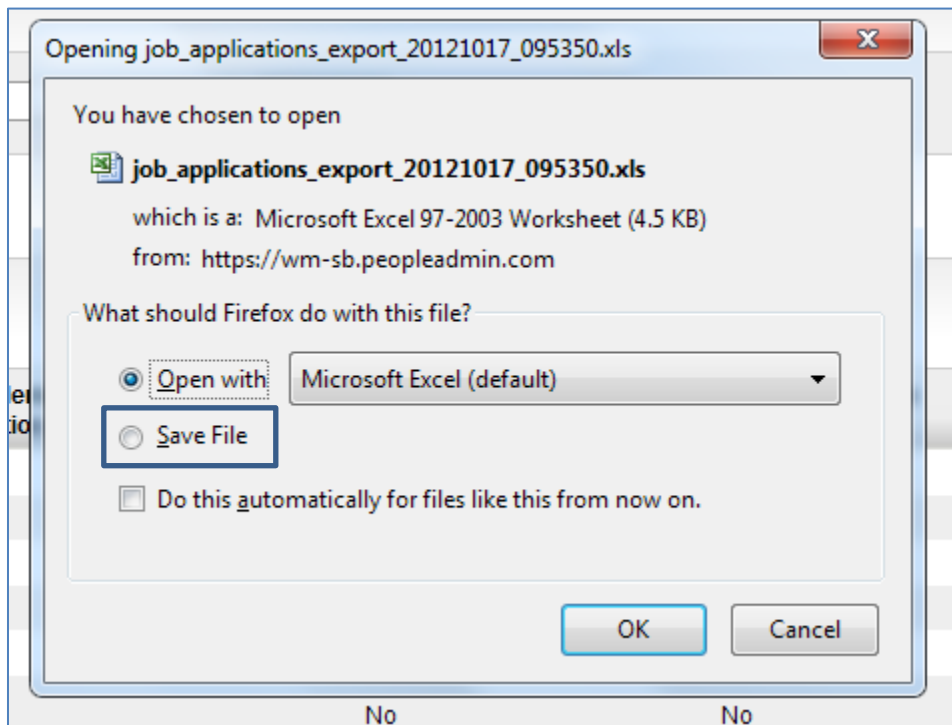
After reviewing the applications along with the supplemental questions, move the applicants in the workflow to “Not Under Consideration with the appropriate reason” or to “Interview Pending”.

Full Name	Workflow State (Internal)	Degree Received:	Supplemental question Score	Veteran Question (VQ1):	Veteran Question (VQ2):	Veteran Question (VQ4):	Veteran Question (VQ5):	(Actions)
A, Susie	Interview Pending		8.0	Yes	Yes			Actions
Bee, Honey	Interview Pending		6.0	Yes	Yes	No	No	Actions
Aikman, Troy	Interview Pending	HS, BS	8.0	Yes	No	No	No	Actions
Kay, Mary	Not Under Consideration	HS, Bachelor's degree	3.0	No	No	Yes	No	Actions
Doe, Jane	Not Under Consideration		4.0	No	No	No	No	Actions
Johnson, Kimberly	Interview Pending	Advanced High School Diploma	7.0	No	No	No	No	Actions
Kitty, Hello	Not Under Consideration		4.0	No	No	No	No	Actions
Duck, Donald	Interview Pending		8.0	No	No	No	No	Actions

To prepare to export the Screening Search data, click the box beside “Full Name” and hover over the Actions button to choose “Export results”.

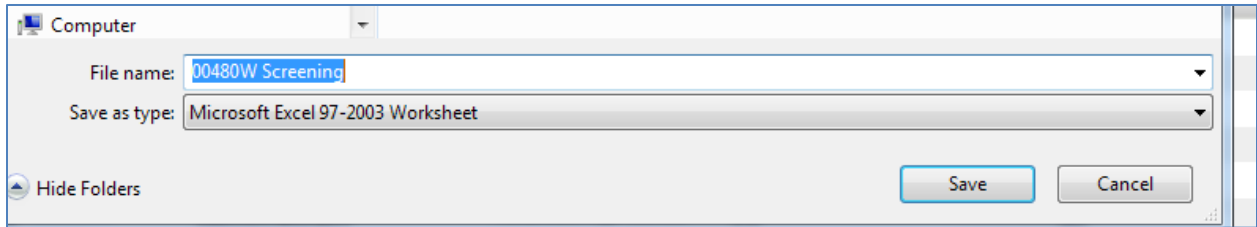
<input checked="" type="checkbox"/> Full Name	Workflow State (Internal)	Degree Received:	Supplemental question Score	Veteran Question (VQ1):	Veteran Question (VQ2):	Veteran Question (VQ4):	Vete (VQ5)	(Actions)
<input checked="" type="checkbox"/> A, Susie	Interview Pending		8.0	Yes	Yes			<ul style="list-style-type: none"> Evaluate Applicants Download Applicants Evaluations Review Supplemental Question Answers Download Supplemental Question Answers Export results Download Applications as PDF Create Document PDF per Applicant
<input checked="" type="checkbox"/> Bee, Honey	Interview Pending		6.0	Yes	Yes	No	No	
<input checked="" type="checkbox"/> Aikman, Troy	Interview Pending	HS, BS	8.0	Yes	No	No	No	
<input checked="" type="checkbox"/> Kay, Mary	Not Under Consideration	HS, Bachelor's degree	3.0	No	No	Yes	No	
<input checked="" type="checkbox"/> Doe, Jane	Not Under Consideration		4.0	No	No	No	No	
<input checked="" type="checkbox"/> Johnson, Kimberly	Interview Pending	Advanced High School Diploma	7.0	No	No	No	No	
<input checked="" type="checkbox"/> Kitty, Hello	Not Under Consideration		4.0	No	No	No	No	
<input checked="" type="checkbox"/> Duck, Donald	Interview Pending		8.0	No	No	No	No	

The following will appear allowing you to choose to Save File and click OK.



Screening Search

You will now be able to customize the name of the file and save it.



The Excel file will save with the fields from your Screening Search and can be customized before saving and attaching to the posting under the Internal Documents tab.

Full Name	Workflow State (Internal)	Degree Received:	Supplemental Question Score	Veteran Question (VQ1):	Veteran Question (VQ2):	Veteran Question (VQ4):	Veteran Question (VQ5):
A, Susie	Interview Pending		8	Yes	Yes		
Bee, Honey	Interview Pending		6	Yes	Yes	No	No
Aikman, Troy	Interview Pending	HS, BS	8	Yes	No	No	No
Kay, Mary	Not Under Consideration	HS, Bachelor's degree	3	No	No	Yes	No
Doe, Jane	Not Under Consideration		4	No	No	No	No
Johnson, Kimberly	Interview Pending	Advanced High School Diploma	7	No	No	No	No
Kitty, Hello	Not Under Consideration		4	No	No	No	No
Duck, Donald	Interview Pending		8	No	No	No	No



In accordance with the Code of Virginia, which requires state agencies give preference in the hiring process to veterans, and in support of Executive Order 29 (2010), *Serving Virginia's Veterans*, applicants are voluntarily asked to respond to questions concerning veteran status. Please refer to the DHRM Policy 2.10 – Hiring, Veteran's Preference for guidance on providing the required level of preference.

Screening Search (continued)

To attach your Screening Search to the posting, click on Edit.

Posting: Academic Dept Admin (Staff/PPF) Edit

Current Status: Posted

Position Type: **Staff/PPF** | Created by: **Hiring Official**
 Department: **Music Dept - 3KC210** | Owner: **Hiring Official**

Take Action On Posting ▼

- ★ See how Posting looks to Applicant
- Print Preview (Applicant View)
- Print Preview

Summary
History
Settings
Applicants
Reports
Hiring Proposals
Associated Position Description

Editing Posting

Posting Details

- Recommendations
- Supplemental Questions
- Guest User
- Applicant Documents
- Search and Selection Plan
- Internal Documents
- Ranking Criteria
- Search Committee Member
- Summary

Click on Internal Documents

Hover over the Actions Link and choose “Upload New” to load the Excel spreadsheet.

Internal Documents
Save
<< Prev
Next >>

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

Document Type	Name	Status	(Actions)
Interview Questions - Staff searches only			Actions ▼
Job Advertisement Copy - for all searches			Actions ▼
Search Waiver/Modification Request			Actions ▼
Screening Search			Actions ▼

Save

Upload New
 Create New
 Choose Existing

Choose a Name, Description and upload the file before selecting Submit.

Upload a Screening Search

To upload your document, provide a name and description of the document. To choose a file to upload, click the **Choose File** button and select the file from your computer. When you are ready to submit your document, click the **Submit** button.

Name

Description

File to upload Browse...

Submit

Submitting to Employment

Editing Posting

Posting Details

- Recommendations
- Supplemental Questions
- Guest User
- Applicant Documents
- Search and Selection Plan
- Internal Documents
- Ranking Criteria
- Search Committee Member
- Summary**

Click on the Summary Tab

Posting: Academic Dept Admin (Staff/PPF) [Edit](#)

Current Status: Posted

Position Type: **Staff/PPF** | Created by: **Hiring Official**
Department: **Music Dept - 3KC210** | Owner: **Hiring Official**

Take Action On Posting

WORKFLOW ACTIONS

- Keep working on this Posting
- Notify Employment Screen Grid/Rubric Attached (move to Posted: Screening Grid/Rubric Attached and Notify Employment)

Hover over **Take Action On Posting** and either Keep working on the Posting or choose to Notify Employment the Screening Grid/Rubric is attached.

Posting was successfully transitioned

Home **Postings** Hiring Proposals | My Profile

Postings / [Staff/PPF](#) / [Academic Dept Admin \(Posted: Screening Grid/Rubric Attached and Notify Employment\)](#) / Summary

Posting: Academic Dept Admin (Staff/PPF)

Current Status: Posted: Screening Grid/Rubric Attached and Notify Employment

Position Type: **Staff/PPF** | Created by: **Hiring Official**
Department: **Music Dept - 3KC210** | Owner: **Employment**

Posting was successfully transitioned to Employment and you will be contacted if there are any concerns regarding your interview pool.

After Conducting Interviews

You need to change the status of your applicants from “Interview Pending” to “Interviewed”. If you selected Ranking Criteria and assigned Committee Members to evaluate your applicants keep in mind the workflow state you identified for the Committee Members to be able to evaluate the applicants.

The screenshot shows a web interface titled "View Active Applicants" with a saved search for "View Active Applicants" (5 Items Found). Below the search bar is a table with columns: Full Name, Application Date, Documents, Workflow State (External), and Workflow State (Internal). The table lists five applicants: A. Susie, Bee, Honey, Aikman, Troy, Johnson, Kimberly, and Duck, Donald. To the right of the table is an "Actions" dropdown menu with options under "GENERAL" (Evaluate Applicants, Download Applicants Evaluations, Review Supplemental Question Answers, Download Supplemental Question Answers, Export results) and "BULK" (Move in Workflow, Download Applications as PDF, Create Document PDF per Applicant).



Full Name	Application Date	Documents	Workflow State (External)	Workflow State (Internal)
A. Susie	October 16, 2012 at 01:30 pm		Application Materials under review	Interviewed
Bee, Honey	October 16, 2012 at 01:39 pm		Application Materials under review	Interviewed
Aikman, Troy	October 16, 2012 at 01:50 pm		Application Materials under review	Interviewed
Johnson, Kimberly	October 16, 2012 at 03:51 pm	Cover Letter, Resume/Curriculum Vitae	Application Materials under review	Interviewed
Duck, Donald	October 16, 2012 at 04:08 pm	Resume/Curriculum Vitae, Cover Letter	Application Materials under review	Interviewed

The Hiring Official and each Committee Member will check the box above the list of applicant names and hover over the Actions tab, then select “Evaluate Applicants”.

Once a finalist has been selected, update the status of all applicants and indicate the finalist. This can be done in bulk by choosing to “Move in Workflow” under Bulk.

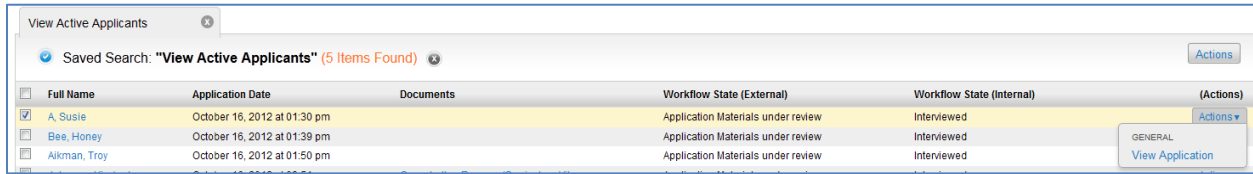
The screenshot shows a web interface titled "Editing: Workflow States for 4 Applicants". It features a table with columns: Applicant, Current State, and Reason. The table lists four applicants: Honey Bee, Troy Aikman, Kimberly Johnson, and Donald Duck, all with a "Current State" of "Interviewed". Above the table is a "Change for all applicants" dropdown menu with options: "Select a workflow state...", "Select a workflow state...", "Finalist", "Interviewed, Not Selected (Send Email)", and "Interviewed, Not Selected (No Email - Send Letter)". Below the table are "Save changes" and "Cancel" buttons.

Applicant	Current State	Reason
Honey Bee	Interviewed	
Troy Aikman	Interviewed	
Kimberly Johnson	Interviewed	
Donald Duck	Interviewed	

Select the appropriate choice and  or  to change for all applicants.

Creating the Hiring Proposal

Check the box next to the name of your finalist and hover over the Actions link to view application.

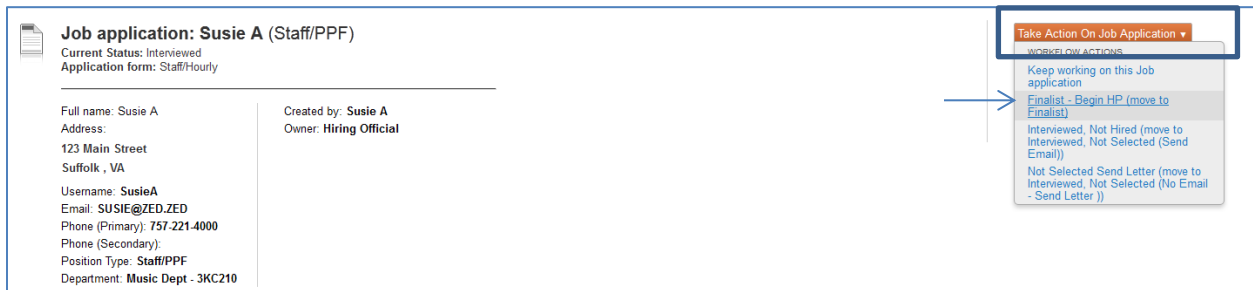


<input type="checkbox"/>	Full Name	Application Date	Documents	Workflow State (External)	Workflow State (Internal)	(Actions)
<input checked="" type="checkbox"/>	A, Susie	October 16, 2012 at 01:30 pm		Application Materials under review	Interviewed	Actions
<input type="checkbox"/>	Bee, Honey	October 16, 2012 at 01:39 pm		Application Materials under review	Interviewed	
<input type="checkbox"/>	Alkman, Troy	October 16, 2012 at 01:50 pm		Application Materials under review	Interviewed	

GENERAL View Application

The workflow action Take Action on Job Application will appear for you to select:

Finalist – Begin HP (Hiring Proposal)



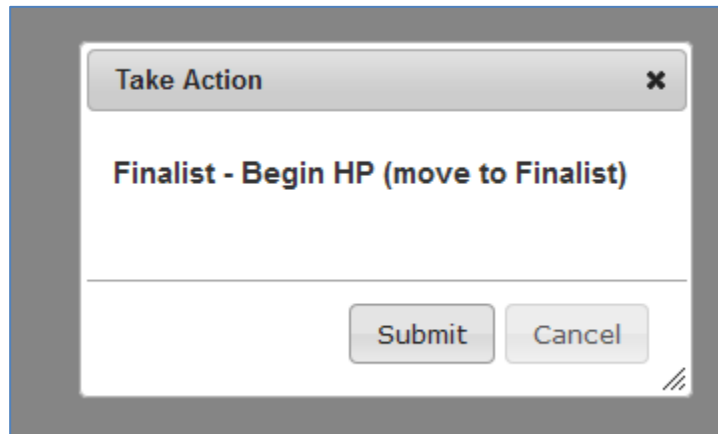
Job application: Susie A (Staff/PPF)
Current Status: Interviewed
Application form: Staff/Hourly

Full name: Susie A
Address: 123 Main Street, Suffolk, VA
Username: SusieA
Email: SUSIE@ZED.ZED
Phone (Primary): 757-221-4000
Phone (Secondary):
Position Type: Staff/PPF
Department: Music Dept - 3KC210

Created by: Susie A
Owner: Hiring Official

Take Action On Job Application

- Keep working on this Job application
- Finalist - Begin HP (move to Finalist)
- Interviewed, Not Hired (move to Interviewed, Not Selected (Send Email))
- Not Selected Send Letter (move to Interviewed, Not Selected (No Email - Send Letter))



After choosing to begin the HP, appears for you to select Submit.



Take Action On Job Application

- ★ View Posting Applied To
- ★ Preview Application
- ★ Evaluate Applicant
- ⊕ Start Staff/PPF Hiring Proposal


Click on "Start Staff/PPF Hiring Proposal"

The Hiring Proposal

Select Position Description

The position description will be indicated for you to . The Hiring Proposal will default with information from the approved position description but fields will need to be completed to process the request.

Hiring Proposal Save Next>>

 [Check spelling](#) ▼

Hiring Proposal

Position Number	00027L
Position Title	Administrative Staff Assistant
Hours Per Week	
Role Code	19013
First Name	
Last Name	A
First Name	Susie
Approved Hiring Range	\$25,250 - \$38,847
Salary or Hourly Rate to be offered	<input type="text"/>
Proposed Begin Date	<input type="text"/>
Date of Hire	<input type="text"/>
College Orientation	<input type="text"/>
Benefits Orientation	<input type="text"/>
Employee Background Check	Non-Sensitive

Select Save Next >> to continue.

The Hiring Proposal (continued)


Review the Budget Information tab and attach any documents appropriate on the Hiring Proposal Documents tab.

The screenshot shows the 'Hiring Proposal Documents' tab. On the left is a navigation menu with 'Hiring Proposal Documents' selected. The main area has a 'Save' button, '<< Prev' button, and 'Next >>' button. Below these is a note: 'PDF conversion must be completed for the document to be valid when applicable.' A table lists documents with columns for 'Document Type', 'Name', 'Status', and '(Actions)'. The table contains four rows of document entries.

Document Type	Name	Status	(Actions)
Staff Searches Only - Candidate Selection Form			Actions ▾
Staff Searches Only - Reference Check Form			Actions ▾
Staff Searches Only - Reference Check Form (2)			Actions ▾
Candidate Selection Report - PPF/Instructional/Executive			Actions ▾

Select   to continue.

The screenshot shows the 'Summary' tab of a hiring proposal. The title is 'Staff/PPF Hiring Proposal: Susie A (Staff/PPF)'. It includes fields for 'Current Status: Draft', 'Position Type: Staff/PPF', 'Department: Music Dept - 3KC210', 'Applicant: Susie A', 'Posting: Academic Dept Admin', 'Created by: Lynn Riggs', and 'Owner: Lynn Riggs'. At the bottom are 'Summary', 'History', and 'Settings' tabs. On the right, a 'Take Action On Hiring Proposal' dropdown menu is open, showing options: 'Keep working on this Hiring Proposal', 'Cancel Action (move to Cancel Action)', and 'Compensation Review (move to Compensation Review)'.

Review the Summary information before selecting  to choose to move the Hiring Proposal to Compensation Review.