**NC STATE** UNIVERSITY

# PeopleAdmin Training Guide – Hire / Applicant Tracking

# 04/2019

## Table of Contents

# Introduction of Applicant Tracking

Welcome to the Applicant Tracking (Hire) module of PeopleAdmin. In this module, you have the ability to create job postings, review applicants and application materials, and request a job offer and approval SHRA, EHRA Faculty and EHRA Non-Faculty positions. The job posting is the first look a potential applicant receives of the position and, possibly, North Carolina State University. The Hiring Proposal is the form that will ensure your candidate is properly hired.

**During this training document, we will cover:**

1. How to create a new SHRA/EHRA Faculty/EHRA Non-Faculty posting and secure the proper approvals to begin your recruitment.

2. How to review your applicants and their application materials.

3. How to request an interview for your qualified applicants and how to request follow-up interviews.

4. How to complete a Hiring Proposal and complete the hiring of your applicant.

**Helpful links:**

Talent Acquisition & Employment

Hiring Manager Toolkit

SHRA Recruitments

EHRA Recruitments

Reference Check Guidelines

Telephone Reference Check Form

PeopleAdmin 7 System and Resources

# Applicant Tracking Module

**Login Information:**

1. For employee users: Go to website address: https://jobs.ncsu.edu/hr and click on the Single Sign-On (SSO) Authentication link. Note: You may be prompted to login using multi-factor authentication at this point.

2. You will login with your current myPACK Unity ID.



**Request access and modify information**
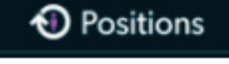
*If you are a new employee or requesting access for the first time, follow these steps:*

1. Go to https://hr.ncsu.edu/peopleadmin/peopleadmin-request-form/
2. On the selection screen, select your two-digit OUC.
3. When selected, a name will appear in the "Requestor" field
4. Contact the person in the "Requestor" field and email (or call) him or her to give you access to the PeopleAdmin system.
5. Please include what type of access you are requesting (initiator-most common, approver, unit AA, non-UTS or Department Viewer).
6. The "requestor" will "evaluate" the request and will decide if it is to be approved or not.
7. Once approved (by the Requestor and HR), PeopleAdmin can be accessed.

# Applicant Tracking Module

**Home Page:**

Once you have logged into PeopleAdmin, the Home Page will display an inbox, watch list, and other items where you easily navigate to actions which need your attention. Below is a detailed list of the Home Page and the functions available:

| Functional Area | Location | Definition |
|---|---|---|
| **Inbox** | **CENTER** of Home Page upon log in | Displays all items requesting your attention (approval/review). |
| **Watch List** | **BOTTOM** of Home Page upon log in | Displays any request you are watching (postings, position actions) for easy access. |
| My Profile    Help | Columns at **TOP** of screen | Used to update your user account details and online help for using the system. |
| Module Type Selection ● Hire ● Positions | Upper **RIGHT** hand corner of screen | Used to toggle between the Position Management and Applicant Tracking modules. |
| User Group Selection Initiator ▼ | Upper **RIGHT** hand corner next to your name | Displays the user groups available to you and the arrow will toggle you into each user group. |

**Module Type Definitions**

● Positions — Used to create or modify Position Descriptions, salary adjustments, view Position Descriptions, and submit Position Actions.

● Hire — Used to create and view Job Postings, view Applicants and application materials, and complete Hiring Proposals.

# Applicant Tracking Module

**Applicant Tracking User Group Definitions**

**Initiator** – *Creates position action*. Enters/verifies title, requirements, and essential functions.

**Approver** – *Reviews/Approves*. Verifies title, approval of creation, etc. (Can have multiple Approvers as needed)

**Unit Fiscal/AA Officer** – *Reviews/Approves*. Reviews/Approves funding sources (if not already done by an approver), budget and/or affirmative action (Can have multiple Officers as needed)

**University AA Officer** – *Reviews/Approves*. Reviews New EHRA Faculty positions, Waivers and EHRA Hiring Proposals.
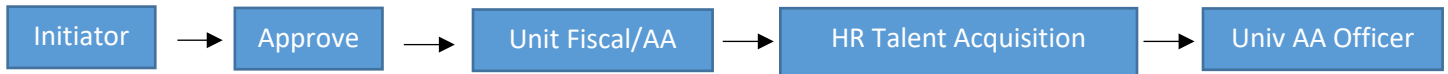
**HR Class & Comp** – *Reviews/Endorses.* Reviews/endorses title, assigns position number. Sends final confirmation via e-mail to department once Action is endorsed.

**Please note: Individuals may have only one user group or may be assigned to more, depending on their role within the approval process for actions.**

**EHRA Non-Faculty Hiring Proposal Action Workflow:**

Initiator → Approver → Unit Fiscal/AA officer → HR Talent Acquisition

**EHRA Faculty Hiring Proposal Action Workflow:**

Initiator → Approve → Unit Fiscal/AA → HR Talent Acquisition → Univ AA Officer

**SHRA Hiring Proposal Action Workflow:**

Initiator → Approver → Unit Fiscal/AA officer → HR Talent Acquisition

**Core Functions of the Applicant Tracking (Hire) Module**

- Generate and approve hiring proposals
- View postings and applications

# View Job Postings and Applicants:

1.  Verify you are in the 'Hire module (blue header) and authorized to access, create and/or view a posting. You must be logged in as an "Initiator" for your department in order to initiate an action.
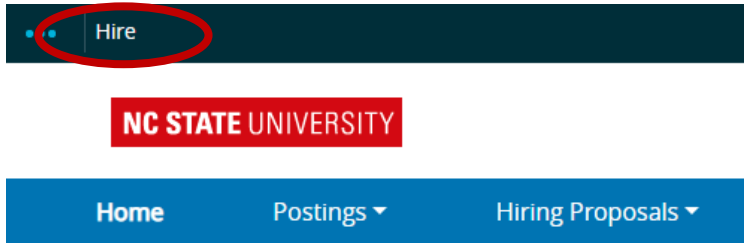


2.  Hover over 'Postings' and click either **SHRA** or **EHRA**.
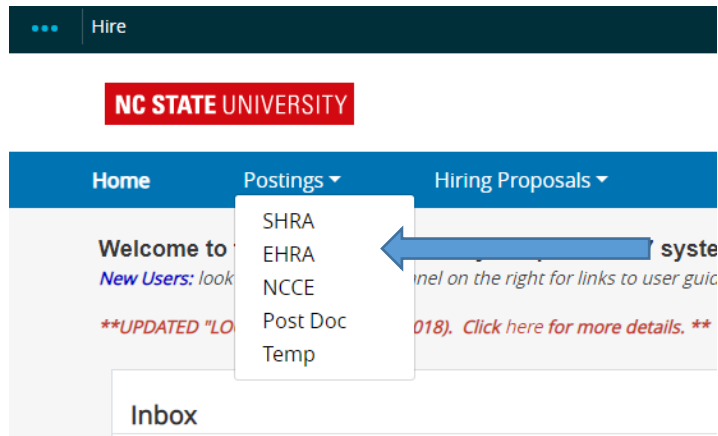


3.  You can locate your posting by either a) locating your search in the "All Postings" list and select on the Position Title hyperlink, or b) entering a position name, posting number or position number in the Search field and click Search.

4.      Once you select the posting, you will have a number of options.

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

Summary – You will see the posting information.

History – You will see the history of all action taken place for the posting. This information includes who made the action and at what date and time.

Applicants - You can view the applicants for this position and view their materials.

Reports - – You can run reports based on the information provided by the applicants

Hiring Proposals – You can view who has been offered this position during this search.

Associated Position Description – You can view the information from the Position Management module for this posting.


## Reviewing Applicants and Application Materials

After selecting your posting, click on the "Applicants" link. The applicants will be listed at the bottom of the page. Here you will see their first and last name, date of application, where they are located in the workflow, and the application documents submitted. To view each application individually, you can click on the applicant's last name.

Above the list of applicants on the right-hand side of the screen, is a button that says "Actions". This button will provide you with the following options:
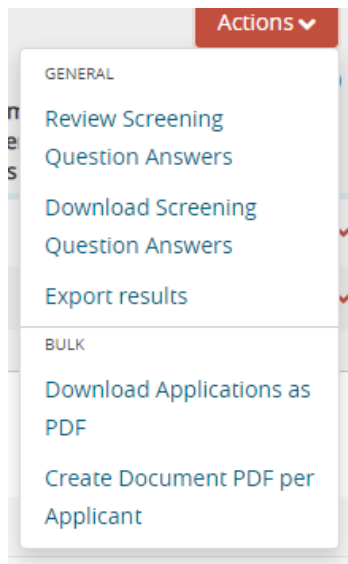
**GENERAL**

Review Screening Question Answers: You have the ability to review the answers to the supplemental questions from all applicants. You can identify which applicants answered a specific way by selecting on the hyperlink of the answer.

Download Screening Question Answers: You have the ability to export the answers to the supplemental questions into a Microsoft Excel spreadsheet.

Export results: You have the ability to export the information from the applicants' materials into a Microsoft Excel spreadsheet.

**BULK**

Download Applications as PDF: You have the ability to export all application materials including attached documents from all applicants into one PDF file.

Create Document PDF per Applicant: You have the ability to export all application materials including attached documents for each individual applicant into individual PDF files.

## Take Action On Job Application / Workflows:

When viewing the application, the **Initiator** can update the candidate's status by hovering over the "Take Action on Job Application" button located on the upper right hand corner of the application. **Note**: Please be aware that actions are based on individual applicants and not the entire pool of applicants



If you are the **Initiator**, you have four actions that you can take on an individual applicant:

Keep working on this Job application: You can continue to review the applicant's application material without taking any actions
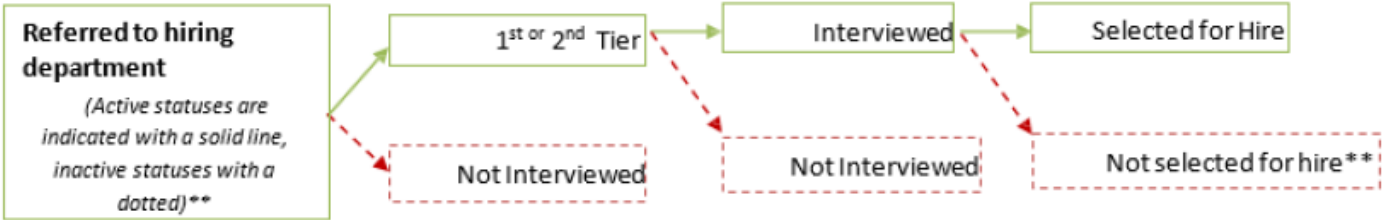
1st Tier:  Candidate is Highly Qualified. Meets the requirements and most of the preferred.

2nd Tier: Candidate is Qualified – Meets the requirements and some of the preferred.
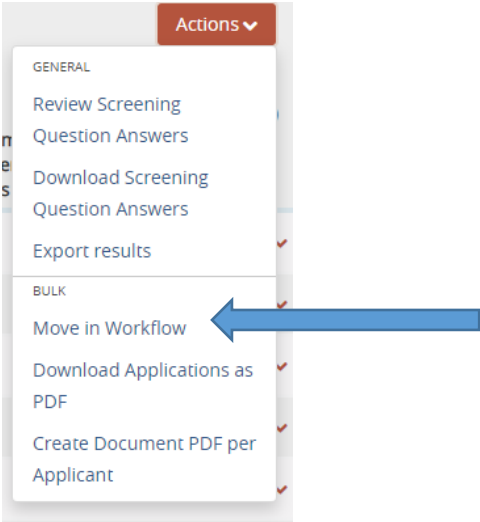
Not Interviewed – Candidate will not be interviewed. Does not appear to meet qualifications.

# Applicant Tracking Module

**Workflows**



To change multiple applicant statuses at once, use the check boxes to the left of the candidate's name. This is located on the applicant summary page that shows the entire pool of applicants:





Select "Move in Workflow" and update the status. Select "Save Changes" once complete.

# Applicant Tracking Module

**Change for all applicants**

| | |
|---|---|
| | 2nd Tier ▾ |
| | Select a workflow state... |
| | **2nd Tier** |
| | 1st Tier |
| | Not Interviewed |

**Current State**                                                                                                          Reason

| | |
|---|---|
| Referred to Hiring Department | 2nd Tier ▾ |
| Referred to Hiring Department | 2nd Tier ▾ |
| Referred to Hiring Department | 2nd Tier ▾ |

Save changes    Cancel

Once given a status of "Not Interviewed", the candidates will be able to see "No Longer Under Consideration" as their status. Contact your Talent Acquisition Consultant should you need to reconsider an applicant who was previously disqualified. Below is a chart that indicates what candidates (external status) will see once they login to see their application status, depending on the internal workflow state.

| Internal Status | External Status |
|---|---|
| Referred to Hiring Department | Materials Submitted |
| Tier I | Review Underway |
| Tier II | Review Underway |
| Interviewed | Review Underway |
| Not Interviewed | No Longer Under Consideration |
| Not Selected for Hire | Review Underway |
| Does Not Meet Minimum Qualifications | Does Not Meet Minimum Qualifications |
| Position Filled | Position Filled |

## Interim Reports (EHRA Recruitments Only):

Interim reports can be submitted AT ANYTIME (when the position is opened or closed) during the recruitment; also multiple interims can be submitted. The most important thing to remember about interim reports is that each candidate that gets an interview needs to have an interim done on them (where they are indicated as a 1st Tier OR 2nd Tier candidate) and approved by OIED before the interview occurs.
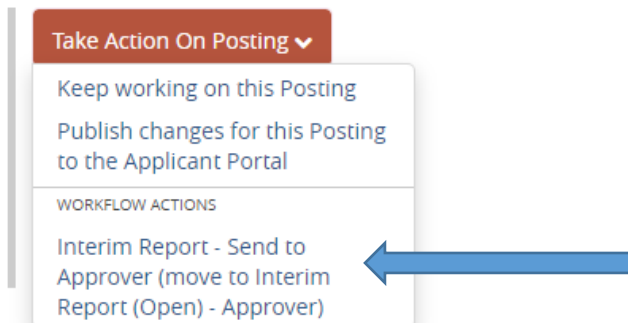
Before an interim report can be submitted, all the applicants in the pool should have an updated status. To see how to update a status, please see the above section on **Take Action On Job Application/Workflows**. This will leave only First and Second Tier candidates remaining in the pool. It should look something like this:

| Applicant Last Name | Workflow State (Internal) | Documents | Hiring Priorities |
|---|---|---|---|
| Patterson | 1st Tier | | Not Applicable |
| Hinton | 2nd Tier | | Not Applicable |
| Hicks | 1st Tier | | State Government Promotion (Currently employed in a permanent State of NC position for 12 consecutive months) |

When the applicant statuses are correct, hover over to the [Take Action On Posting ▼] button on the posting. This will bring up the following options:

Take Action On Posting ▼

Keep working on this Posting

Publish changes for this Posting to the Applicant Portal

WORKFLOW ACTIONS

Interim Report - Send to Approver (move to Interim Report (Open) - Approver)

After the **Interim-Report- Send to Approver** button is pressed, the initiator will be asked to send it to a particular approver via the drop down menu.

The report must be approved by the Approver, department/division Unit AA Officer and University AA Officer (OIED).The initiator will be notified once OIED has approved the Interim Report via automatic email.

The initiator can also check the status at any time by viewing the posting through the PA7 system. Once the interim report is approved, the hiring team can then move forward with the interviews of the 1st and 2nd Tier candidates.

# How to Submit a Hiring Proposal:

The Hiring Proposal is the form and process that allows you to recommend and gain approvals to hire an applicant.

1.  Start Hiring Proposal: After conducting your interviews and determining which applicant you would like to extend an offer to, you will move the candidate to "**Select for Hire**" within the application. This will allow a hiring proposal to be started by the Initiator. **Note**: You must be logged in as an "Initiator" for your department in order to initiate a Hiring Proposal.
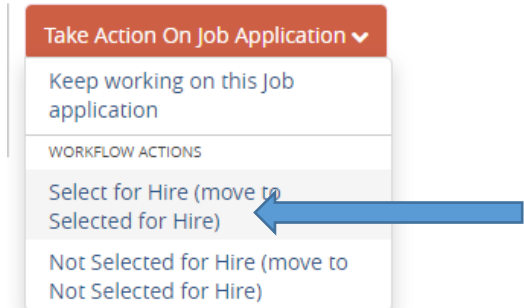
2.  Select "**Start Hiring Proposal.**" (SPECIAL NOTE: HR is aware that there are some instances in which the system is preventing the Initiator from performing this last step. If you encounter any difficulty here, please let your Talent Consultant know and he or she will finalize the Hiring Proposal).
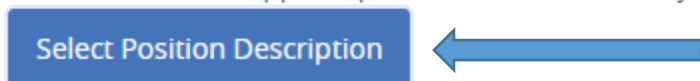
3.  A list of positions within your division will appear on the next page. Your posting with will be automatically selected with the radio button. Select the "Select Position Description" button.

**\*Note: If you are hiring multiple individuals from one posting, you would need to search for the appropriate position description by position number or browse the list, as it would default in the position description that created the posting.**

When you click on the Position Description, a disclaimer box will appear:



> ncsu-sb.peopleadmin.com says
>
> If an employee is currently seated in this Position Description, they will be vacated upon approval of this Hiring Proposal and the new employee will be seated.
>
> OK    Cancel
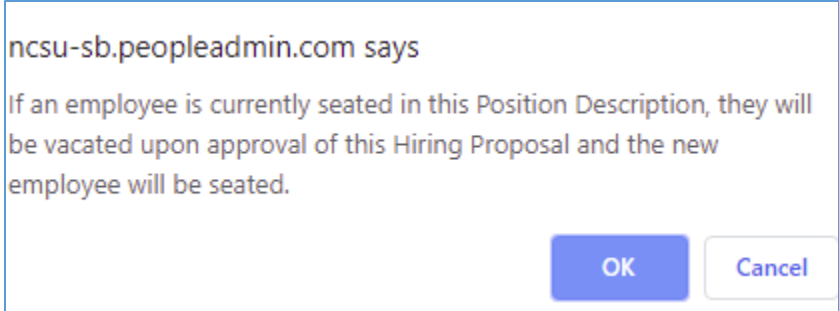
This is explaining that if an employee is currently seated in the position description, they will be removed and the newly hired employee will be seated upon the hiring proposal being completed. You can click "**OK**."

4. You will be taken to the "Editing Hiring Proposal" form:



> **Editing Hiring Proposal**
>
> Hiring Proposal Details
>
> ✔ General Information
>
> ✔ Salary
>
> ✔ Position Information
>
> Hiring Proposal Summary

5. The applicant and position information will default into the Hiring Proposal form. Please verify that all of the applicant's information and the position details are accurate. None of the fields are editable. If a field is incorrect, please go back and select either the correct applicant or position.

6. Complete the required fields:

   Will you be making additional hires for this position? – Select Yes or No.

   Hiring Proposal number – This will populate once routes to approver.

   Proposed Hire date - Proposed Hire Date should be the earliest possible effective date. Start date may be after "Proposed Hired Date" but cannot be before date input.

   Anticipated Hiring Range – This will populate from the posting.

   Requested Salary Range - This is where the desired starting salary or salary range is entered. Amount should be within the Anticipated Hiring Range.

   Did you contact and receive at least two positive professional references for this candidate? – Select Yes or No.

   List the reference(s) you contacted including name, employer/company, and title of the reference(s).

   Note:  Satisfactory reference checks are a condition of employment for new employees. It is your responsibility to obtain at least two work-related references for your final candidate. We recommend using a standard form to check all references and document everything on that form.

7. Click  to continue to next screen.

8. The next two screens display the FTE, market rates, funding sources and position requirements. Verify the information and you may continue to the Hiring Proposal Summary.

9. On the summary page, select and select "Send to Approver." Select the appropriate approver from the drop-down menu.
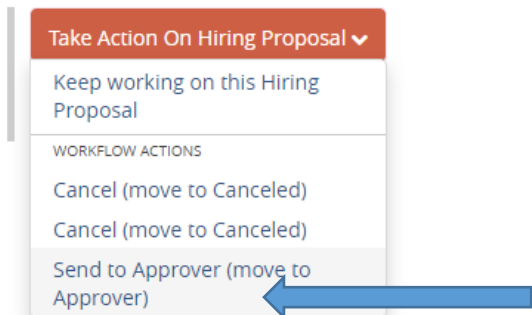
10. Once you have successfully completed and routed the Hiring Proposal, you will see the indicator below:



**For SHRA** - Once approved by the Approver, Unit AA and HR, the initiator will be notified the hiring proposal has been endorsed and can move forward with the offer.

**For EHRA Faculty/Non-Faculty-** Once approved by the Approver, Unit AA and HR, and Univ AA (OIED) the initiator will be notified the hiring proposal has been endorsed and can move forward with the offer.

The status will be **Offer Approved- Background check Pending** when you can move forward with the offer. Once it is at that status, extend the offer to the candidate.

If the candidate counters with an amount greater than the approved salary range contact your Talent Consultant. Don't offer an amount higher than what was originally approved, a new hiring proposal with the adjusted amount will need to be completed prior to extending a counter-offer.

If the candidate declines, select the **Declined Offer Action**. This will end the hiring proposal. A new hiring proposal will then need to be created if you are pursuing another.

# Filling and Closing out the Hiring Proposal and Search:

Follow these steps to close out the Hiring Proposal (to be performed only after the offer has been accepted):

1.  Under Applicant Tracking/Hire (Blue Side), select Hiring Proposals from the top of the page and choose SHRA or SHRA depending on the type of position.
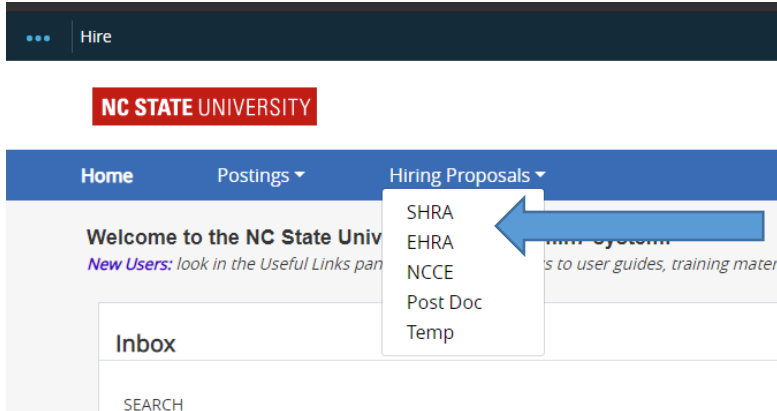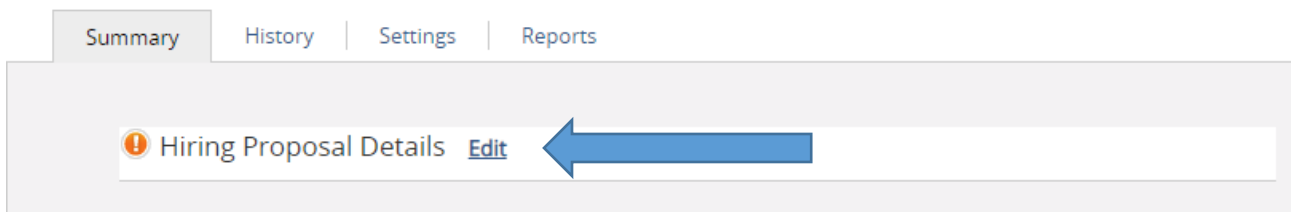


2.  Find the appropriate Hiring Proposal position number and click on it.



3.  Click "**Edit**" and enter the final agreed-upon salary in the "**Final Accepted Salary**" field (it MUST be within the range or the number in the "Approved Salary Range" box. If not, contact your Talent Consultant).

# Applicant Tracking Module

4.    Click **Next** to the end of the Hiring Proposal and select the **Action Button** (Take Action on Hiring Proposal) and choose "**Offer Accepted Background Check Completed**". This will complete the Hiring Proposal. (SPECIAL NOTE: HR is aware that there are some instances in which the system is preventing the Initiator from performing this last step. If you encounter any difficulty here, please let your Talent Consultant know and he or she will finalize the Hiring Proposal).
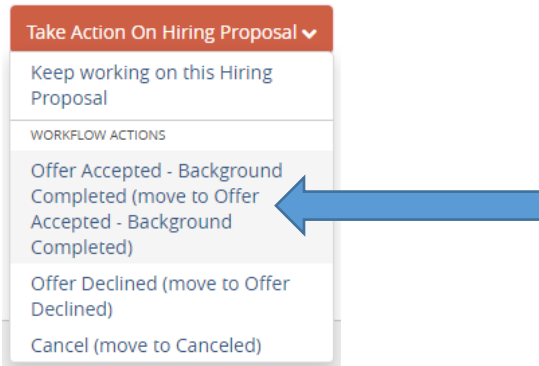


5.    Next, finalize the Posting (to be performed only after the offer is accepted):
   a.   In Applicant Tracking/Hire, select Postings from the top tab menu, select SHRA or EHRA depending on the type of position, find and view the appropriate posting (likely in a Closed state)
   b.   Give the selected candidate a status of "**Offer Accepted**"
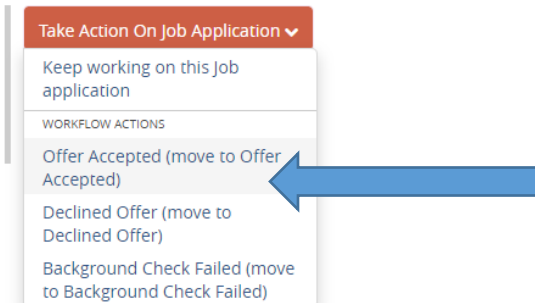


   c.   Ensure all other applicants have a final status, if not done already (i.e. Not Interviewed, Not Selected for Hire, etc.).
   d.   Finally, select "**Designate Job as Filled**" from the Action button menu on the Posting.
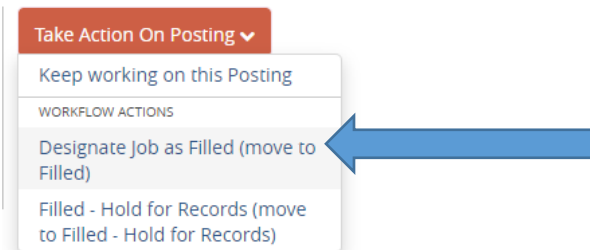


   e.   Completing these steps should finalize the Hiring Proposal and the Posting/Recruitment. The position is now filled and the recruitment process through PeopleAdmin 7 is now completed.