# Hiring Manager's Job Aid to Navigating UDC's Applicant Tracking Tool, ApplicantStack

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The purpose of this guide is to assist with the utilization of this tool, which helps to drive and automate steps in the recruitment and selection process.

**2/11/2019**

# UDC Candidate Stages

**New**

Applicants start in the **New** stage. Perform a high-level or in-depth review of the **Application, Resume, and Answers** for each applicant and compare the information to the position description requirements.

**Manager Review**

Move applicants to the **Manager Review** stage if the experience, qualifications, etc. indicate a closer review for consideration. At this stage, use the **Ratings** column to help group Applicants to help determine the *Best Qualified* individuals.

**Phone Screen**

Move the Candidate to the **Phone Screen** stage to spend time discussing the experience, qualifications, and position. This step helps further determine the *Best Qualified* Candidate to consider for interviews, eliminating unnecessary interviews by saving face-to-face interviews for top talent. Once the candidate is moved to this stage, a **Phone Screen Questionnaire** task is automatically assigned to the Hiring Manager.

**Interview**

Once the Hiring Manager is ready to begin interviewing, the Applicants determined as highly and/or best qualified for the position should be moved to the **Interview** stage. Enter interview Notes and Scoring into the system.

**Final Interview**

Typically, 1 to 2 finalist(s) emerge from the **Interview** stage and are moved to the **Final Interview** stage for the final round of interviews and assessments. Candidates who do not make it to the **Final Interview** stage or who are not offered a position should be contacted, preferably over the phone rather than email.

**Reference Check**

Once a Candidate is moved to the **Reference Check** stage, a notification is sent to the Job Owner in HR and two tasks are automatically assigned to the Hiring Manager. Both tasks provide **Reference Check** questionnaires to be used to evaluate and submit the references in the system.

**Request Job Offer**

After submitting the references, the Hiring Manager should move the candidate to the **Request Job Offer** stage, which automatically assigns the Hiring Manager a Job Offer Preparation task. This task includes a **Request Job Offer** questionnaire. At this point, HR will evaluate the packet and check the final reference.

**Job Offer**

After the verbal offer is extended, HR moves the Candidate to the **Job Offer** stage. This initiates a notification to the Hiring Manager(s) that the verbal offer was extended, which is necessary because Hiring Managers can no longer see candidates in ApplicantStack once they are moved to this stage.

**Job Offer Accepted**

After a signed offer letter is received, HR will move the Candidate to the **Job Offer Accepted** stage and BCC the department contact. This will trigger a Welcome Letter email to be sent to the hired Candidate with the official offer letter and directions on how to complete the new hire paperwork, background check, employment eligibility, and more.

**Hired**

Once the hired Candidate is moved to the **Job Offer Accepted** stage, ApplicantStack will automatically move them from that stage to the Hired stage. Congratulations, you have successfully carried out the UDC recruitment process!

**Do Not Move Forward**

Move Candidates to the **Do Not Move Forward** stage if the experience, qualifications, interview performance, etc. indicate the individual does not meet the minimum requirements, or if other Candidates are more qualified, at any stage upon evaluation and assessment. When doing so, the system will require you to enter a Rating and Disposition.

**Job Offer Declined**

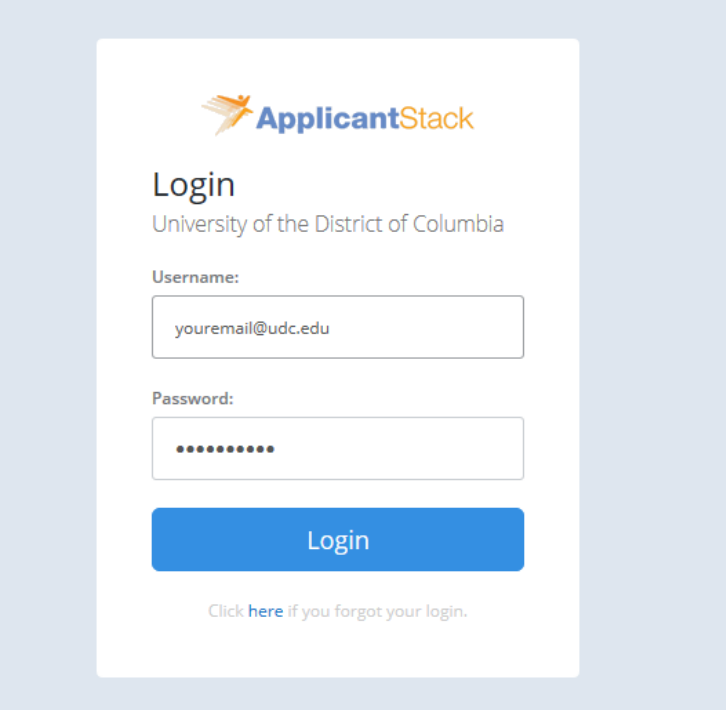
**Withdrawn**

**Future Talent Pipeline**

Move Candidates to the **Future Talent Pipeline** stage at any point in time upon assessment if the individual is a good potential fit for another position, you would hire the Candidate if you had more than one opening, or if the Candidate was strong but slightly edged out by another Candidate.

**If Candidates withdraw or decline the job offer, place them in the **Withdrawn** stage or **Job Offer Declined** stage accordingly.**

ApplicantStack is UDC's Applicant Tracking Tool used to manage online recruiting, selecting, hiring, and onboarding. The system allows for a paperless process allowing more efficient and effective management of our Recruitment and Onboarding Programs. In addition, Applicant Stack is used to report and measure data to ensure best practices and identify areas for improvement.

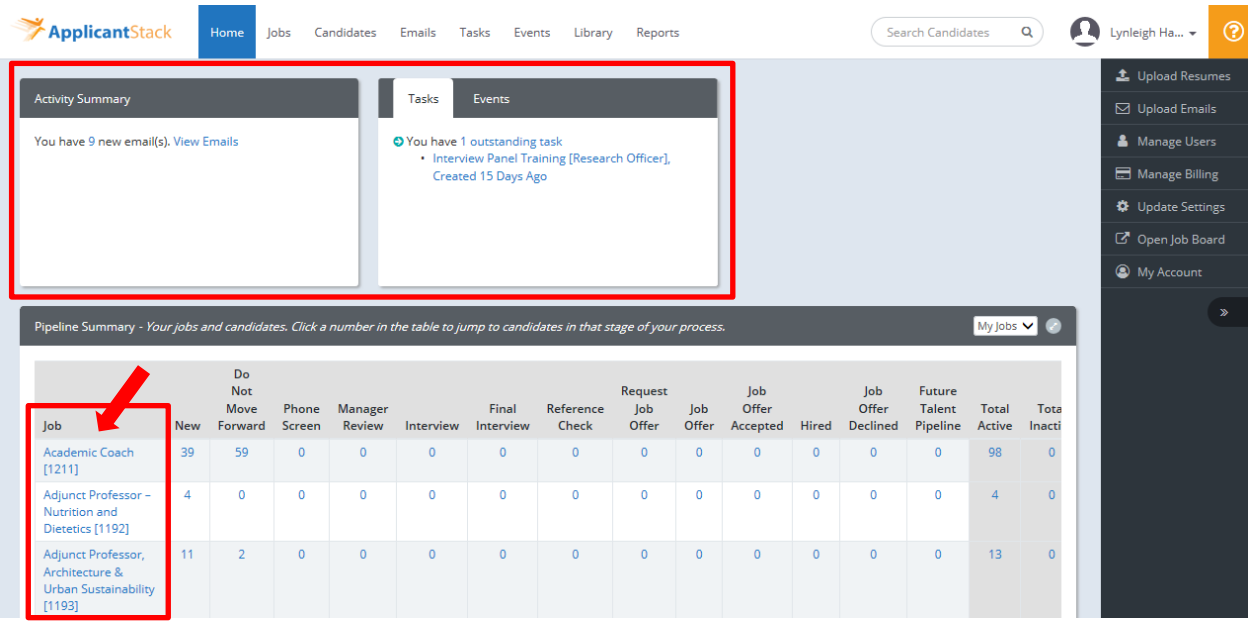



## Log in

User Name:

Password:

Human Resources issues Username and Passwords to Users in order to manage the recruitment and selection process. You will receive a system generated Username and Password.




## Home Page

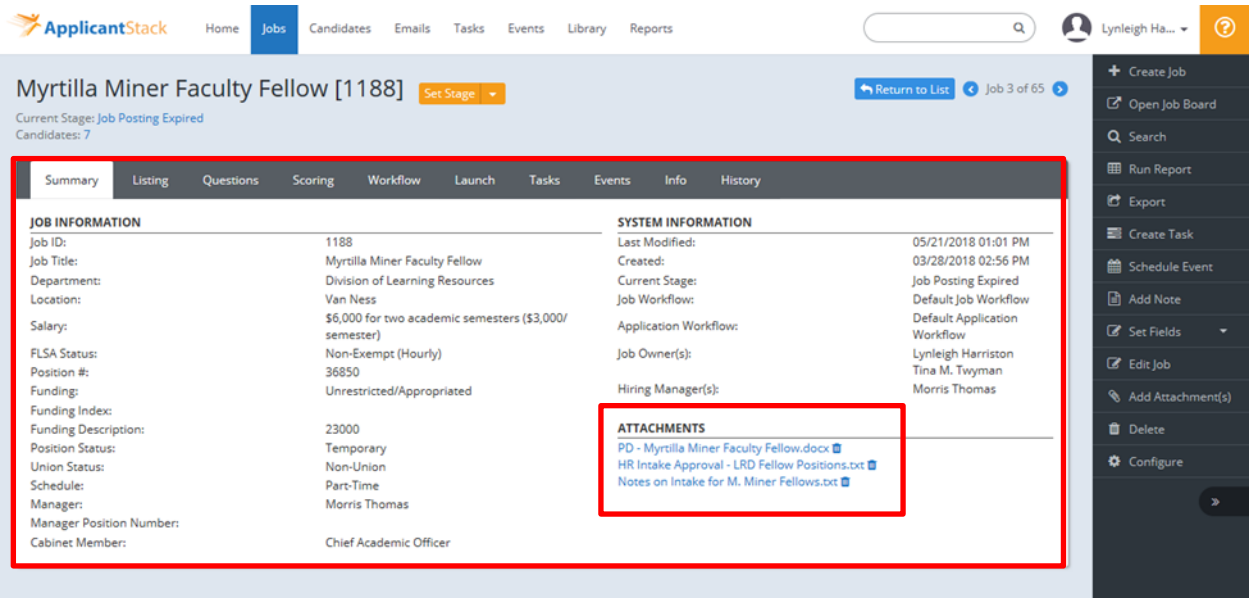
This is command central, which allows you to view activities, navigate the system and perform certain tasks.

Also note the Activity and Task Summary sections for email activity, candidate communication, outstanding tasks, and upcoming events.

Click on the Position Title hyperlink under Pipeline Summary to drill down for more job information.

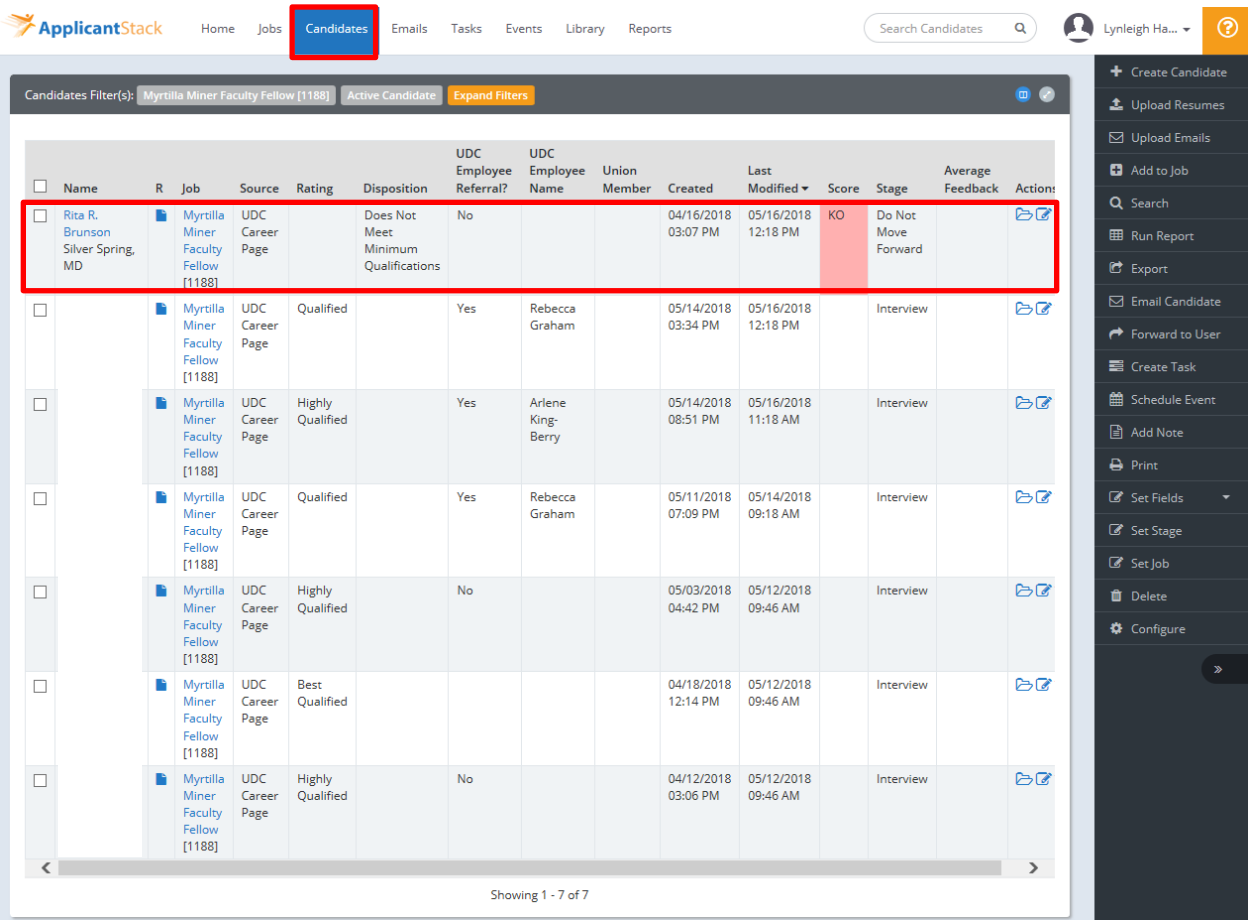
### Recruitment Plan

By now, you should have had a conversation with your HR Representative to discuss the plan to recruit for your position. The recruitment plan will document information such as where to post the job (job boards), the interview process, and other expectations.




This screen shows a high-level summary of the position details.

Click on the **#Candidates** link (top left, under job title and job ID #) to view all the individuals who have applied to the position.



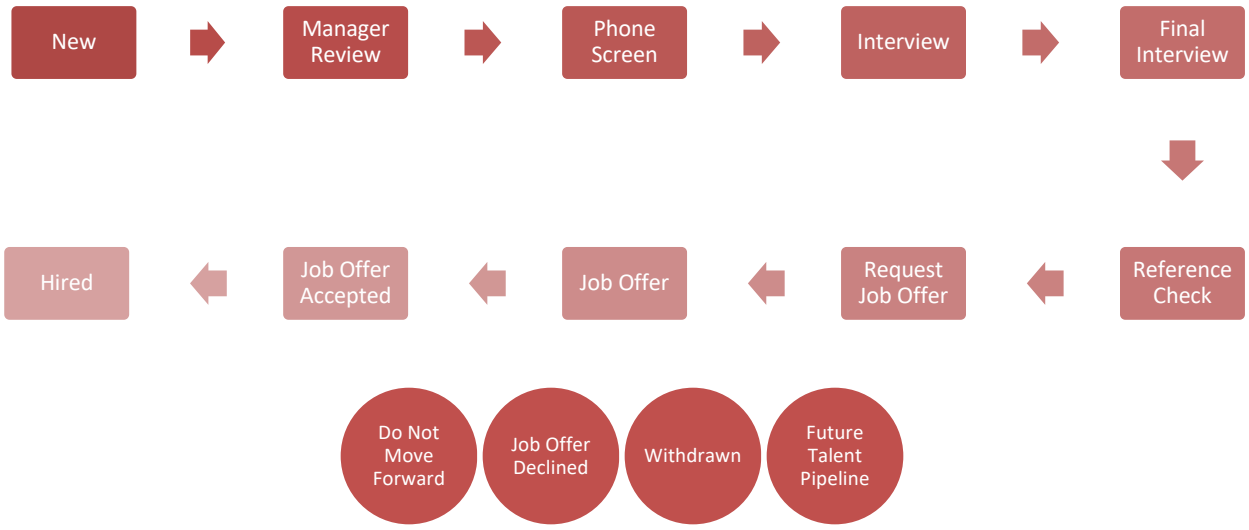

This Candidate Screen/Tab allows you to sort by column and drill down further to review the application, resume, and other data for each individual.

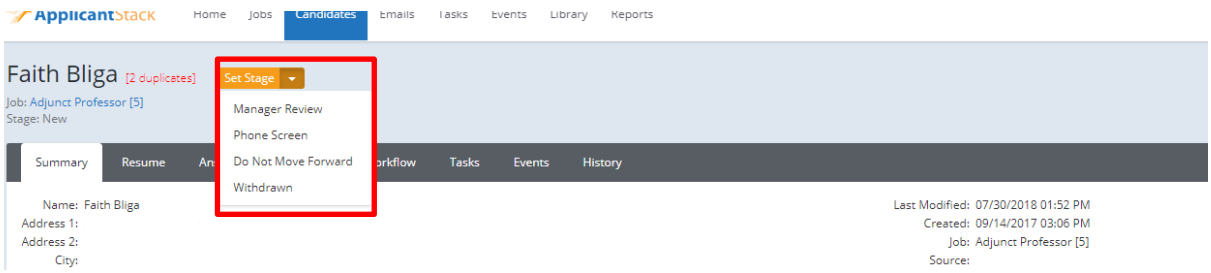
**Score:** Indicates the number of points received based on the individual's answers to qualification questions. For example, education, years of experience, or DC residency. 10 points are added to the score for DC residents (regular appointments only), and 5 or 10 points are added dependent upon the type of Veteran's preference. **NOTE**: Some scores will be higher based on residency and/or veteran's preference, so the overall score may not reflect the best qualified applicant.
**KO (Knock Out)**: Indicates that the applicant does not meet all of the minimum qualifications of the position. For example, the Education or UDC Employee Only required qualification.

**Rating**: Indicates the grouping/categorization of the applicant's level of qualifications based on the position description (minimum, preferred, knowledge/skills, and other special/unique qualifications).

**Disposition**: Indicates the reason/justification for the decision not to move forward with a candidate.

**Stage**: Indicates the point in the phase/stage of the selection process AND ensures the correct communication is sent.




## Reviewing Applicant's Qualifications: Skills, Experience, Knowledge, etc.

All Applicants start at the **New** stage. Review the **Application/Resume,** cover letter if applicable, **and Answers** to the Application (see tabs above) for each applicant and compare to the position description requirements.

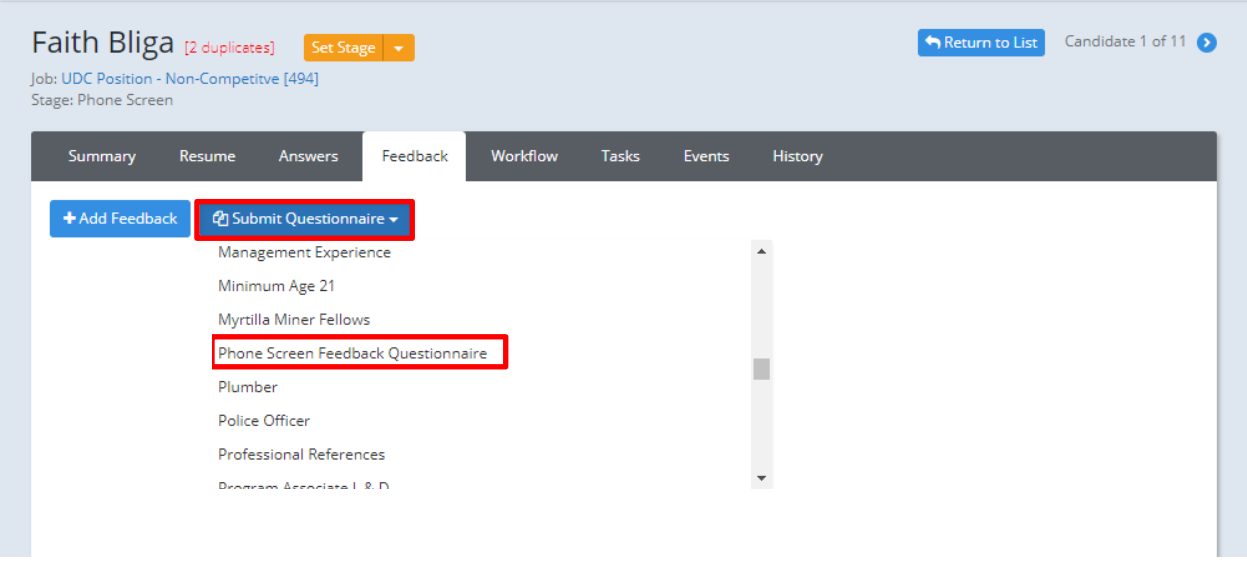
**NOTE**: *Applicants should be moved throughout the stages/process immediately as they're being reviewed.*

Applicants in Stage **Manager Review** are moved to this stage by HR or the Hiring Manager if the experience, qualifications, etc. indicate a closer review for consideration. At this stage, use the **Ratings** column to assist with grouping/ranking Applicants to help determine the *Best Qualified* – those individuals who should continue in the process.

Move to Stage **Do Not Move Forward** if the experience, qualifications, etc. indicate the individual does not meet the minimum requirements or for any other reason (e.g. Others More Qualified) upon evaluation/assessment. When doing so, the system requires you to enter a **Rating** and a **Disposition.** **See note in box on page 7.**

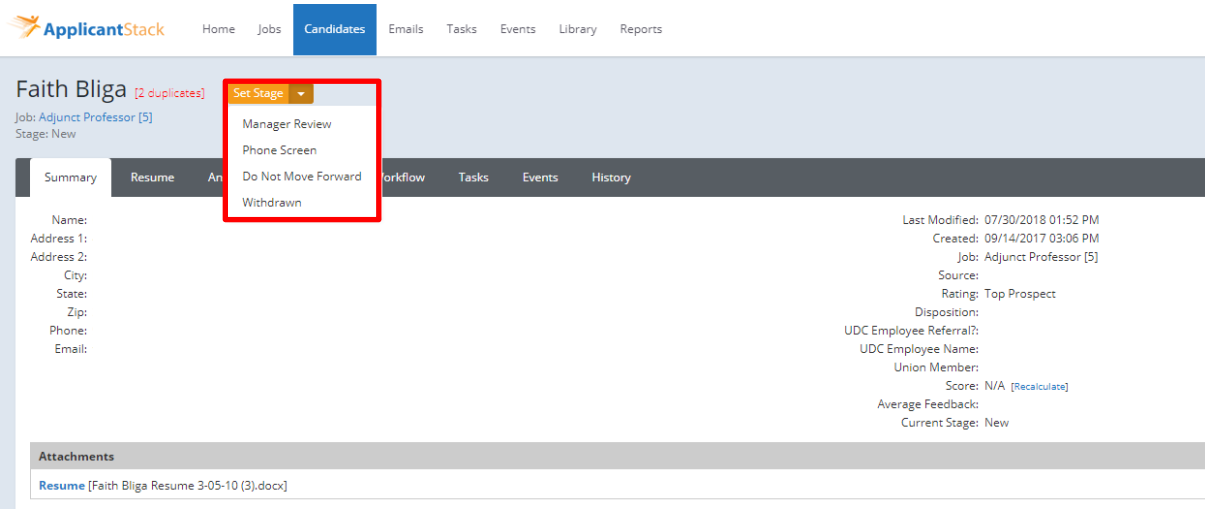
**NOTE**: *A notification is sent to the applicant one day after moved to the **DO NOT MOVE FORWARD** stage.*

Move to Stage **Phone Screen** should you decide to spend time discussing the experience, qualifications, and position with the Candidate. This step helps further determine the *Best Qualified* Candidate to consider for interviews. By phone screening, which is another level of evaluation/assessment, you also have a better chance of eliminating long, unnecessary interviews by only having face-to-face interviews with top talent - those highly and best qualified individuals.



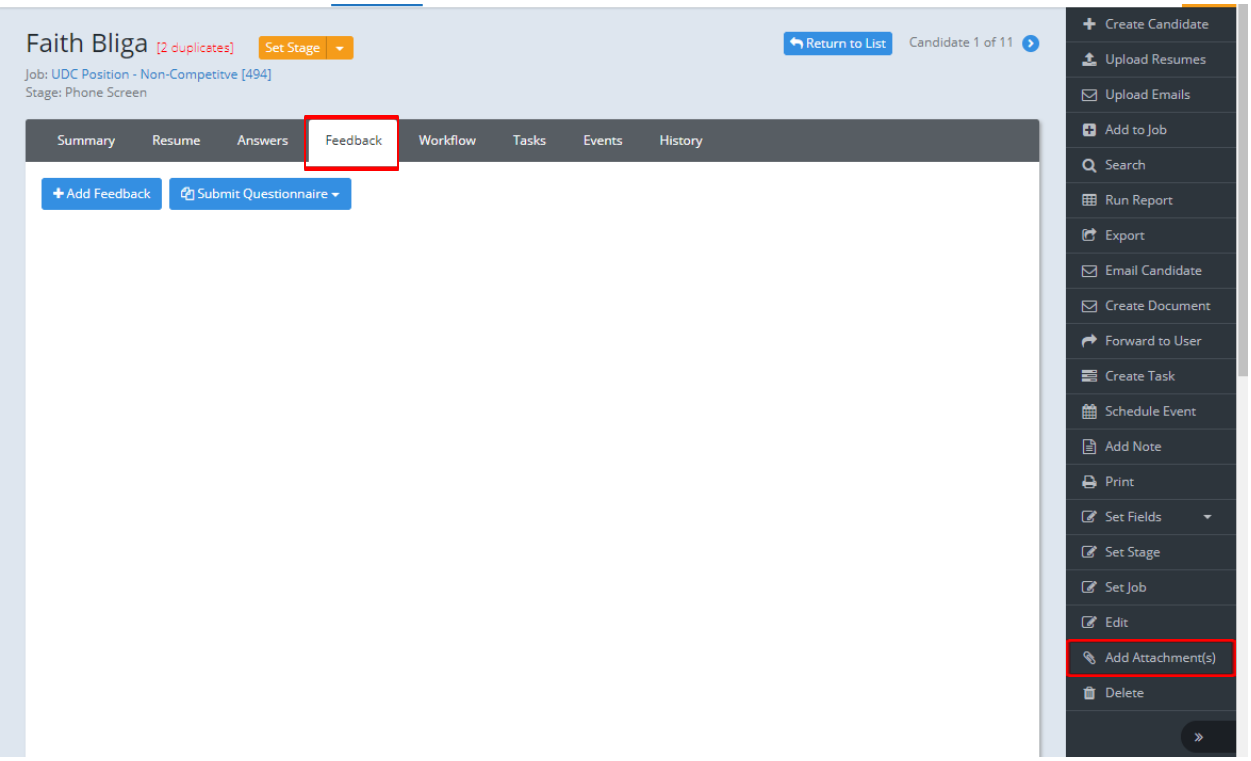

Please enter your phone interview notes into the system. The **Phone Screen Template** will automatically pop up to be completed, though the **Phone Screen Feedback Questionnaire** is also available on the **Candidate** screen under the **Feedback** tab.

**Withdrawn** Stage – Candidates should be moved to this stage if they withdraw from the process.




Move Applicants to Stage **Interview** when those individuals are determined as highly and/or best qualified to bring in for interviews. Enter Notes and Scoring into the system, or upload your notes and scoring information.

**NOTE**: All handwritten notes should be provided to the Panel Chair or Hiring Manager to be uploaded by clicking on Browse on the candidate screen under the **Feedback Tab** or click on **Add Attachments** on the right-side menu**.**




Stage **Final Interview-** Typically 1-2 finalist(s) are moved to this stage for the final round of interviews and assessments.

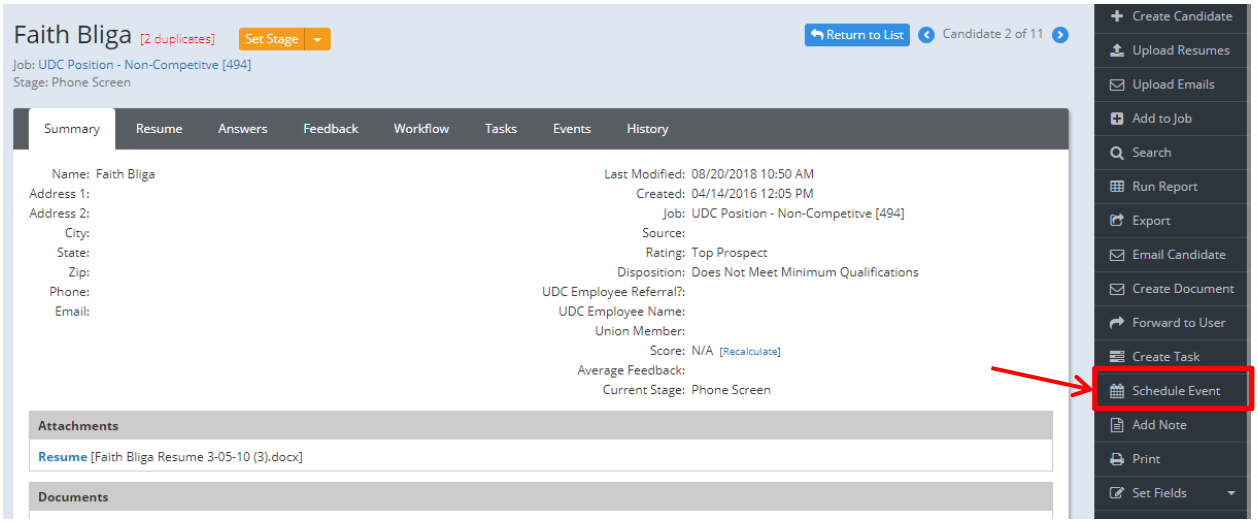
**NOTE:** As individual's fail to progress through the selection process, HR will partner with you in order to send the correct notifications to the appropriate individuals at the right time. Candidates who remain in the *Phone Screen* stage will receive a notification different than those who are in the *Manager Review stage,* which will be different than candidates in the *Interview*, *Withdrawn*, or other stages.

To ensure the right individuals receive the right communication, please do NOT move individuals to the Do Not Move Forward stage once they progress to the Phone Screen or Interview stage.

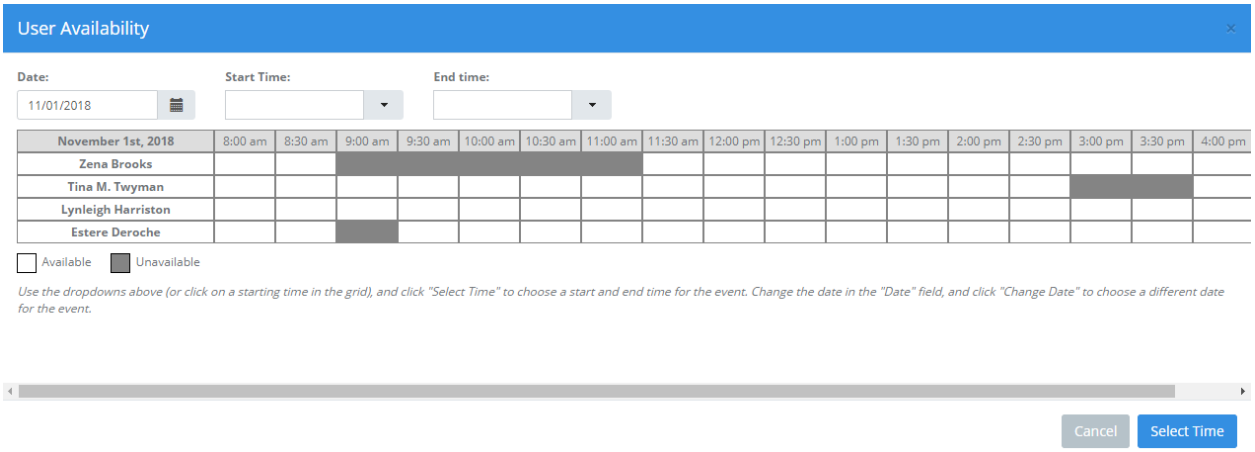
By only moving the candidates who should move forward to the next step in the process, we also can report on data/metrics and communicate more efficiently and timely.

Move Applicants to Stage **Future Talent Pipeline** at any point in time upon assessment if the individual is a good potential fit for another position, you would hire the individual if you had more than one opening, or if the Candidate was strong but slightly edged out by another Candidate.

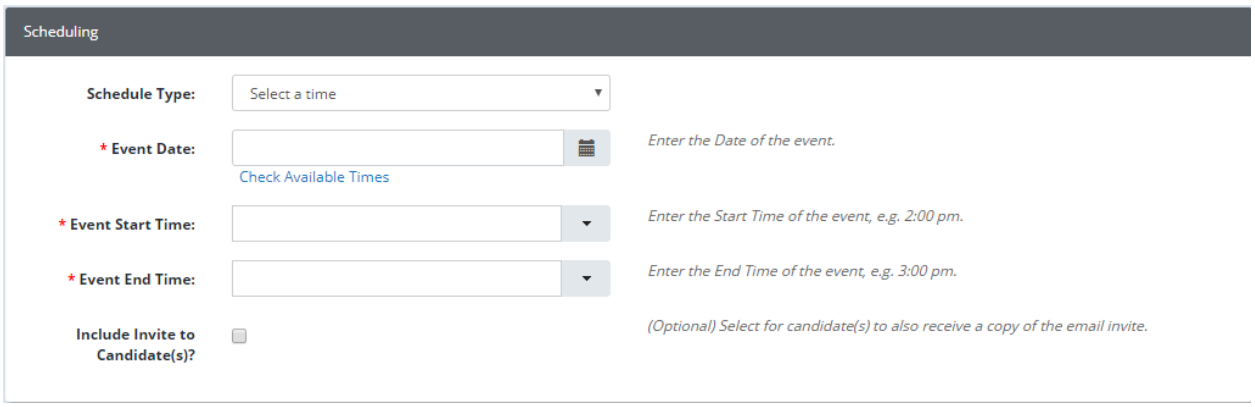
## Scheduling an Event

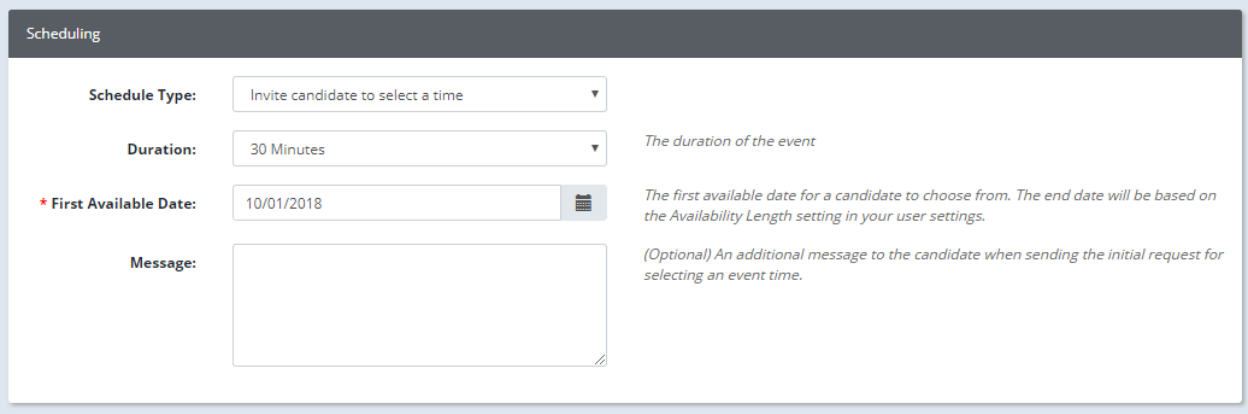



When scheduling an event you can select a date and time or choose to allow the candidate to select the date and time that the event will take place. If you choose to select the date and time, click on **Check Available Times** to see your availability and the availability of the assigned user(s) (e.g., panel members, interview team) you identified in the "Event Information" section.

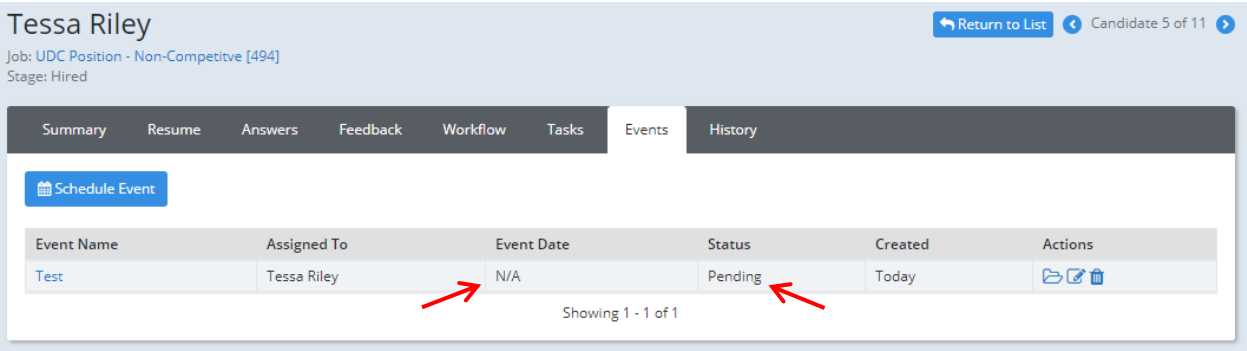



To instead allow the candidate to select the date and time, scroll down to the "Scheduling" section and select "Invite candidate to select a time" from the Schedule Type drop down.

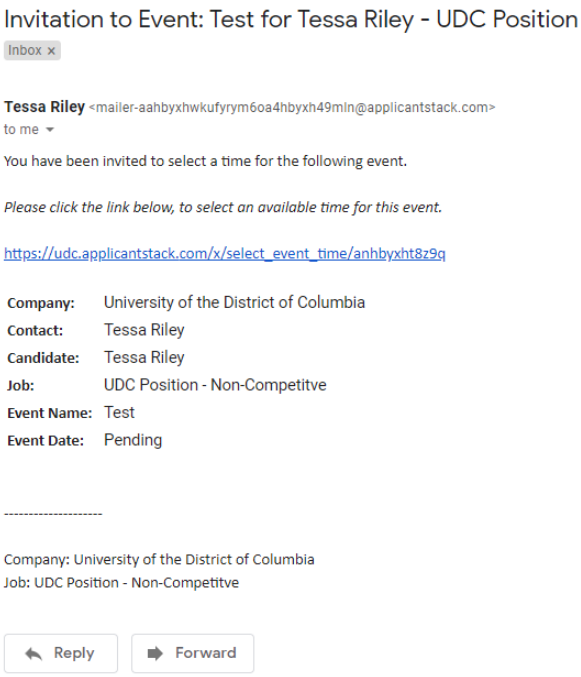




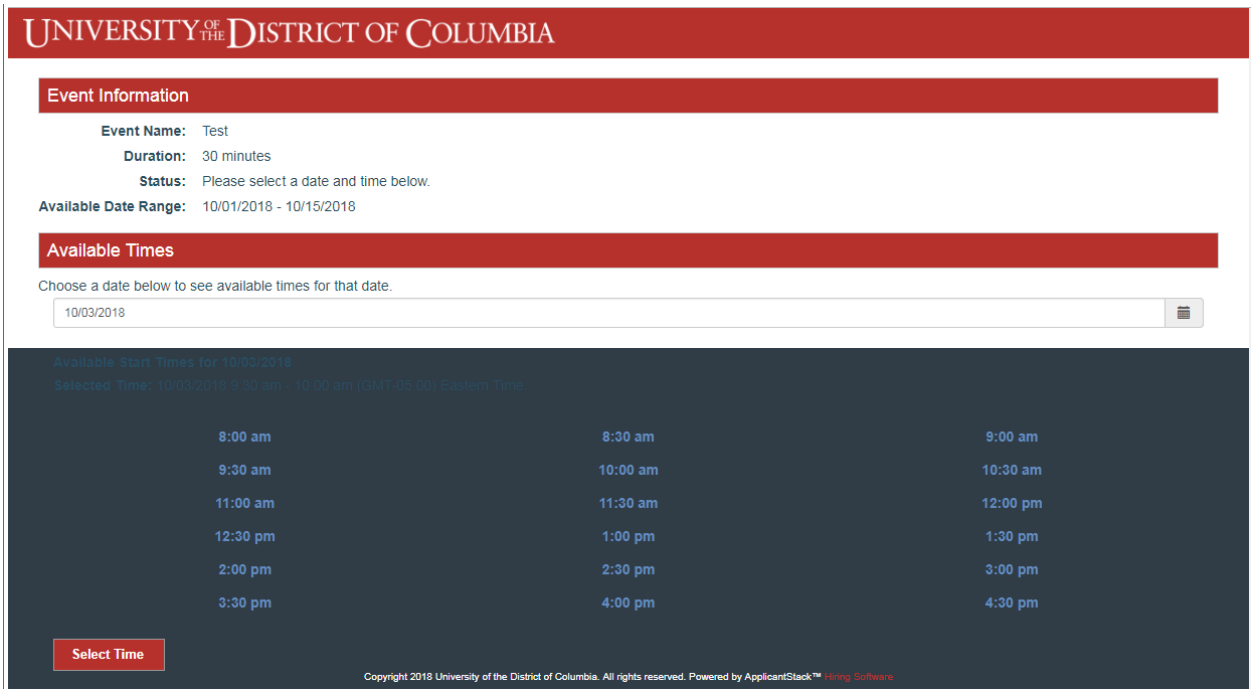

Next select the first available date that the candidate may choose. This automatically defaults to the next available day on the calendar from today's date. Click save after you have completed your event details.



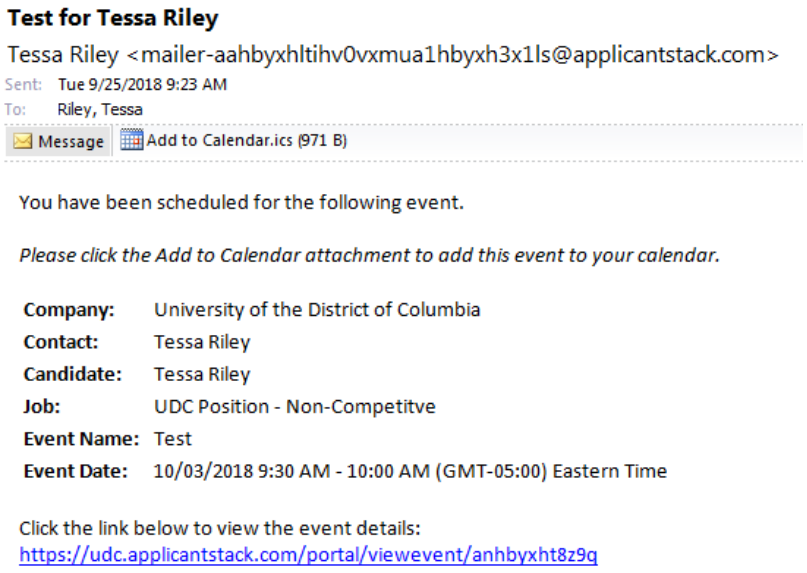

*Candidate event tab before the candidate has selected a date and time.*

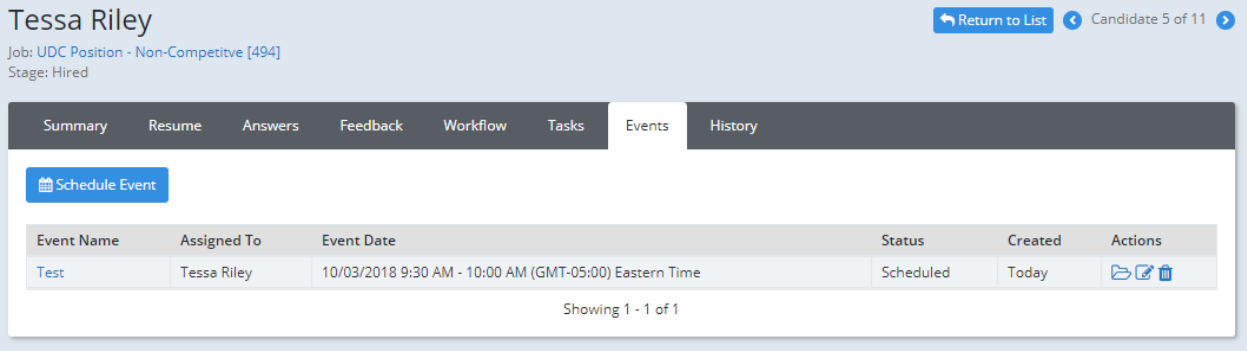


The candidate will receive an email inviting them to select a date and time. When the candidate clicks the link in their email it will present the following screen.



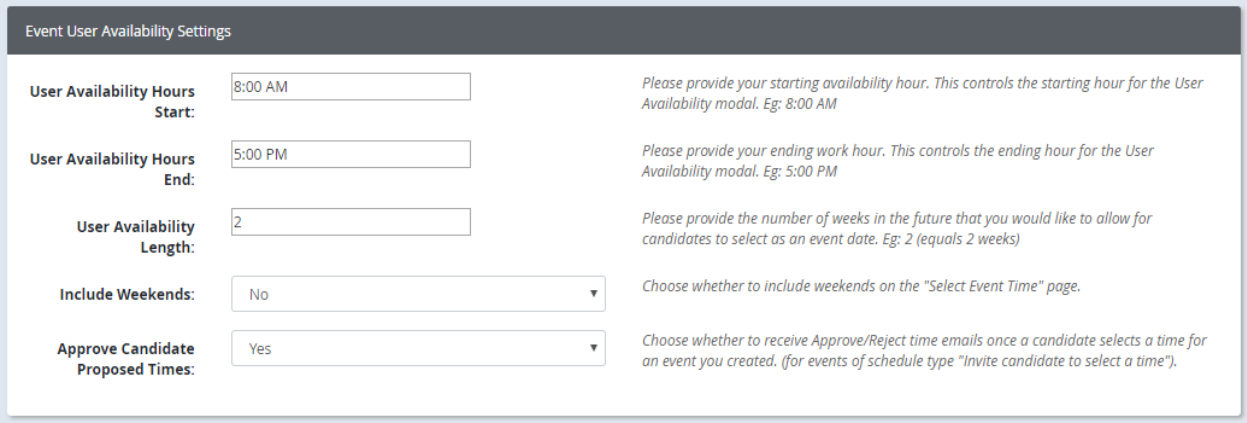

First the candidate will choose a date. Once they choose a date, it will list the available times for the event. These time frames are determined on a per user basis in the settings for your account. The available times offered within the selected time frame are dynamically pulled from your Office 365 calendar. If you selected multiple users, the system will only offer the candidate times when all users are available. Once the candidate selects a date and time, they click select time and the event is scheduled. The Contact receives an email with an .ics file that they can add to their calendar.



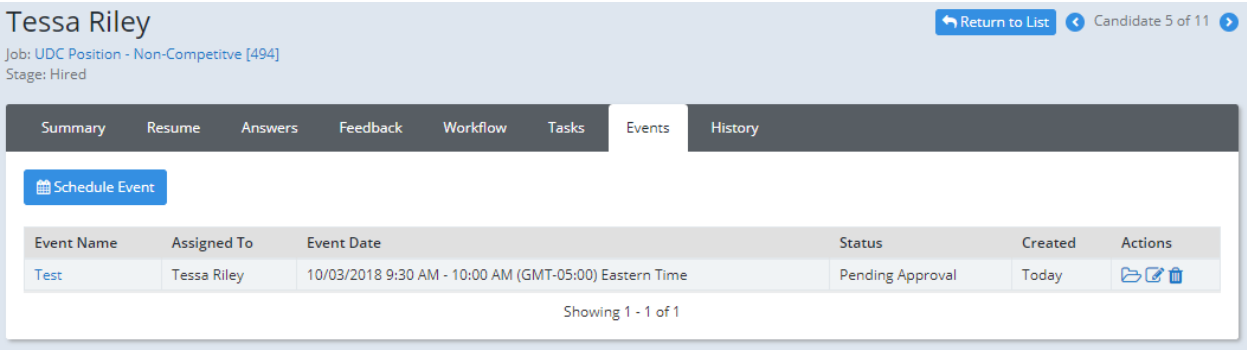



*Events tab after candidate selects a date / time.*

Alternatively you can alter the settings in your user account to allow for weekend selection, set available times for events and you can set whether to automatically approve or manually approve date/time selection.

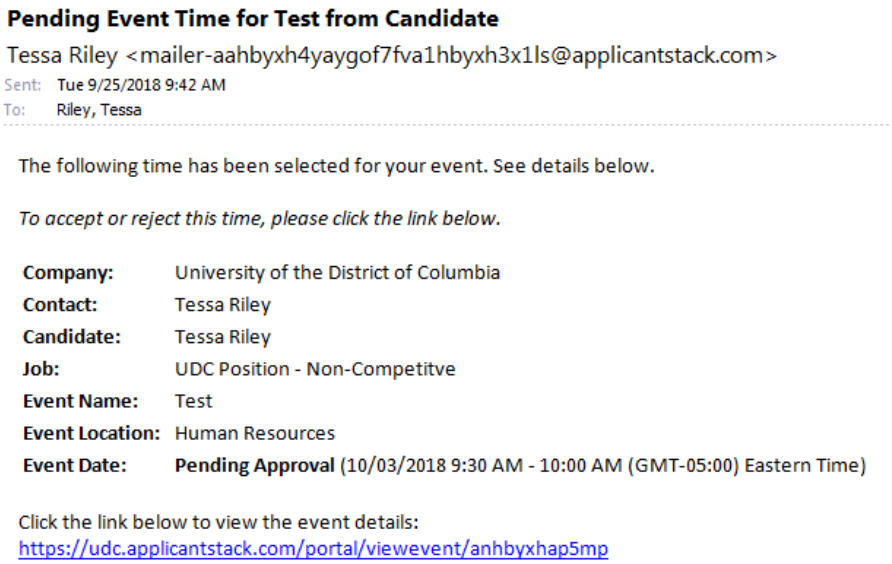



*My Account > Edit > Scroll down to see Event User Availability Settings*




*Events tab after candidate selects a date / time when Approve Candidate Proposed Times setting is set to Yes.*

If you elect to set “Approve Candidate Proposed Times” to yes, when a candidate selects a date/time an email is sent to the event owner (creator of the event) to approve or reject. The email will contain a link that will allow the owner to approve or disapprove the event. Clicking the link will present the following screen:



**Pending Event Time for Test from Candidate**

Tessa Riley <mailer-aahbyxh4yaygof7fva1hbyxh3x1ls@applicantstack.com>

Sent: Tue 9/25/2018 9:42 AM

To: Riley, Tessa

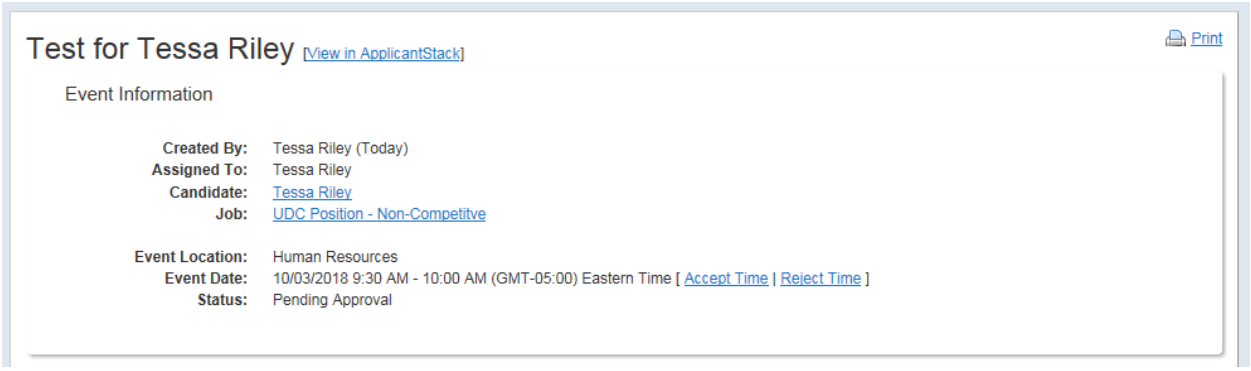
The following time has been selected for your event. See details below.

*To accept or reject this time, please click the link below.*

| | |
|---|---|
| **Company:** | University of the District of Columbia |
| **Contact:** | Tessa Riley |
| **Candidate:** | Tessa Riley |
| **Job:** | UDC Position - Non-Competitve |
| **Event Name:** | Test |
| **Event Location:** | Human Resources |
| **Event Date:** | **Pending Approval** (10/03/2018 9:30 AM - 10:00 AM (GMT-05:00) Eastern Time) |

Click the link below to view the event details:
https://udc.applicantstack.com/portal/viewevent/anhbyxhap5mp

Clicking Accept Time will display a screen where you can edit the event details. If you make edits or make no changes, click Submit and a confirmation message will be sent to the candidate.



Test for Tessa Riley [View in ApplicantStack]

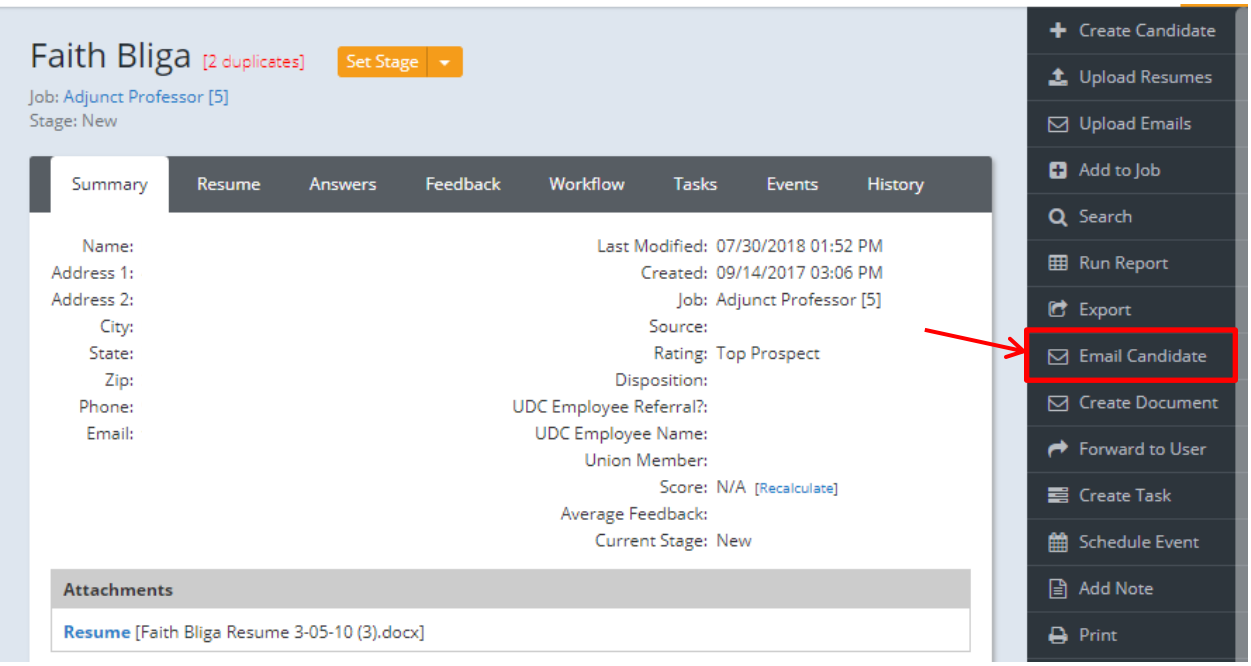
Print

Event Information

| | |
|---|---|
| **Created By:** | Tessa Riley (Today) |
| **Assigned To:** | Tessa Riley |
| **Candidate:** | Tessa Riley |
| **Job:** | UDC Position - Non-Competitve |
| **Event Location:** | Human Resources |
| **Event Date:** | 10/03/2018 9:30 AM - 10:00 AM (GMT-05:00) Eastern Time [ Accept Time \| Reject Time ] |
| **Status:** | Pending Approval |

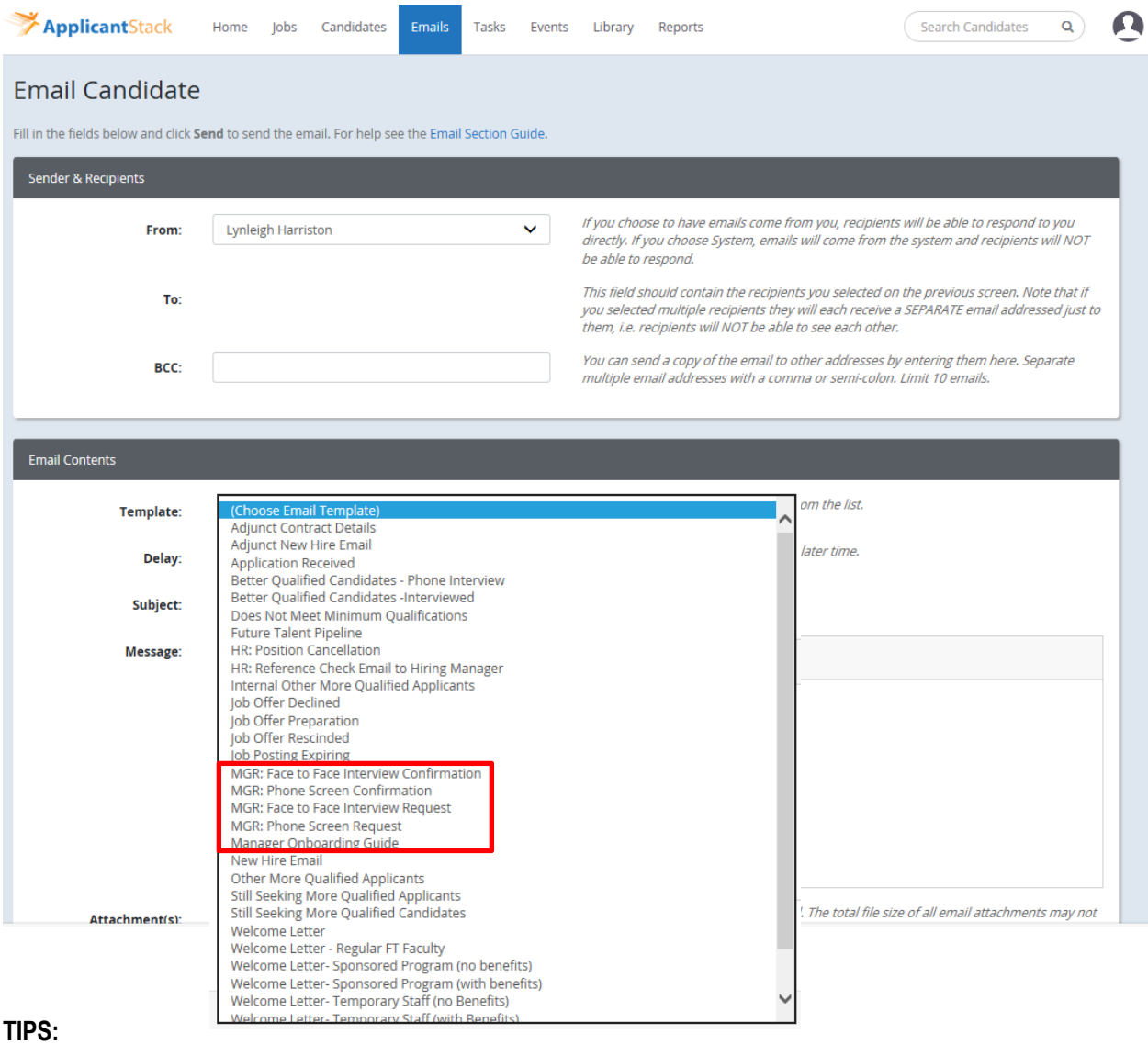
If you click Reject Time, you will be presented with a screen that will allow you to compose a message to the candidate and ask them to choose a new date/time. Clicking Submit will send your message to the candidate. They will then be able to submit a new date/time for approval.

**Email Communication Templates**




In order to have a positive candidate experience, we've developed a number of email templates to communicate timely throughout this process. Your HR Representative will partner closely with you to ensure the right email is sent at the right time to the right candidate.

If needed, you may use communication templates that have MGR in the title to request information, confirm interview information, etc. Select the candidate and choose the appropriate MGR template email by accessing the right-side navigation menu (see above arrow) and selecting **Email Candidate**. These templates can be edited and customized for the specific candidate you are contacting. However, we still recommend you use the aforementioned scheduling functionality when scheduling interviews, phone screens, etc.

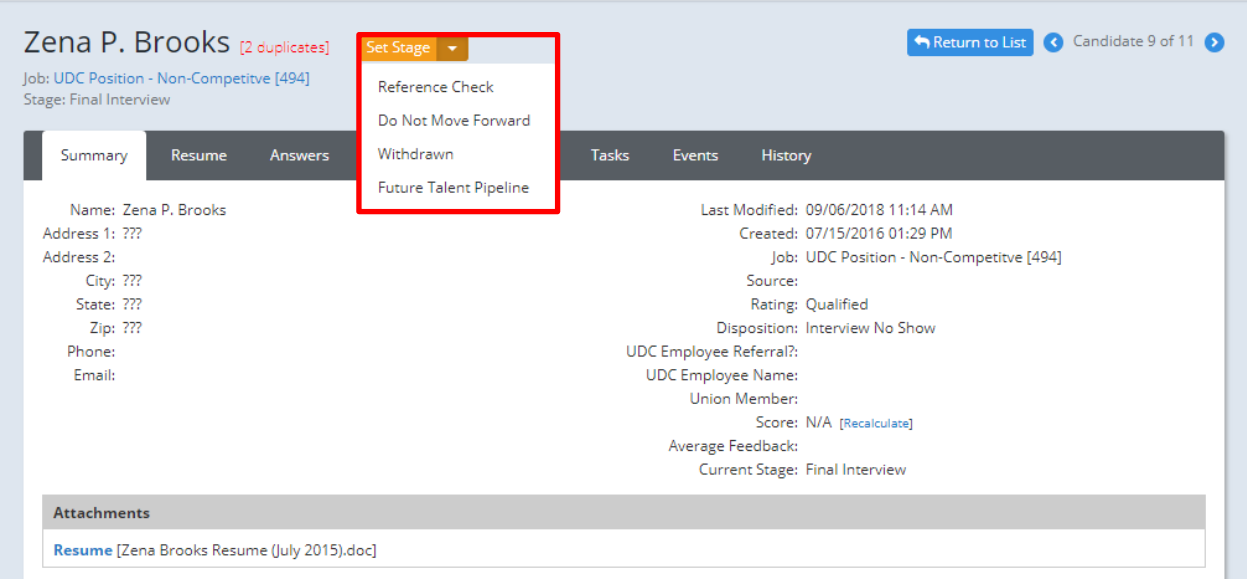



**TIPS:**

**From field:** System = prevents the candidate from corresponding directly with you.

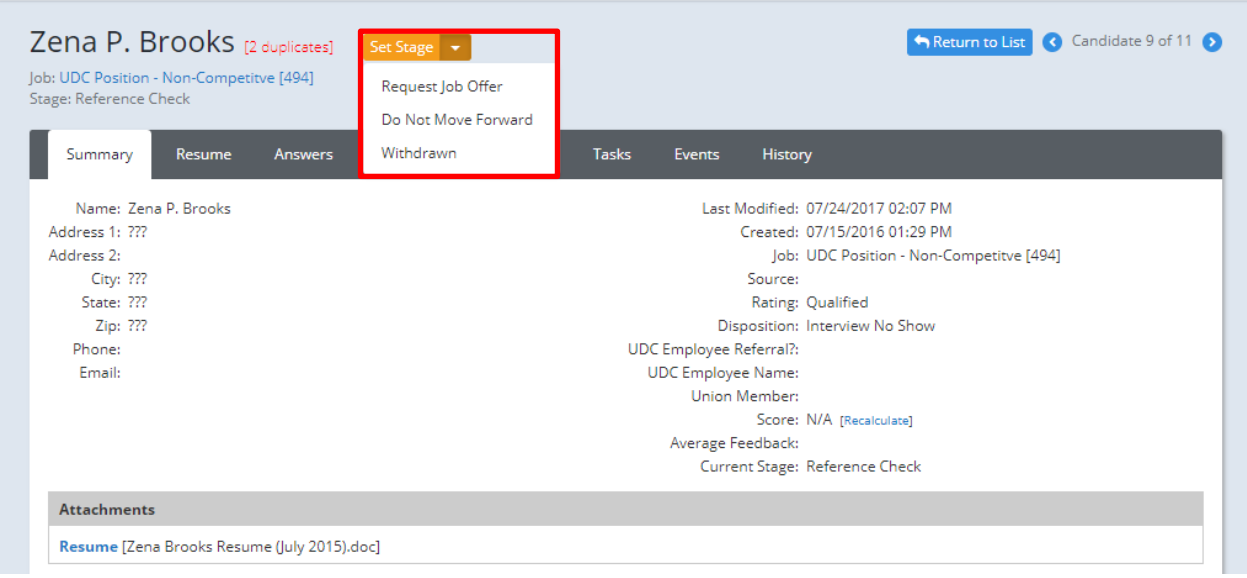
**From field:** User = allows the candidate to correspond directly with you AND saves all correspondence on the candidate's history tab for future reference.

**Delay field:** Allows you to plan ahead and have communication sent in one day, one week, etc. as appropriate. This is useful when on vacation or when HR is ready to send regret emails, and would like to ensure a good applicant/candidate experience by not sending regret emails the same day an applicant applies or interviews.




Once it's decided who should move forward for references, the Hiring Manager/Panel Chair moves the Candidate(s) to the **Reference Check** stage and a notification is sent to the Job Owner in HR. HR will generate a Request - including two Reference Check Templates to be completed and submitted in the system. Alternatively, you may access the Reference Check Template from the **Feedback Tab** and submit the results.

The Candidate should be moved to the **Request Job Offer** stage upon completion of acceptable reference checks.




The Hiring Manager will receive the **Job Offer Preparation** request for completion.

Hiring Managers will receive notifications when the candidate enters the **Job Offer** stage (indicating a verbal and/or written offer letter has been extended) and **Hired** stage when the Candidate accepts the offer (a signed offer letter is received).