

## Recruitment Process

### Revision history

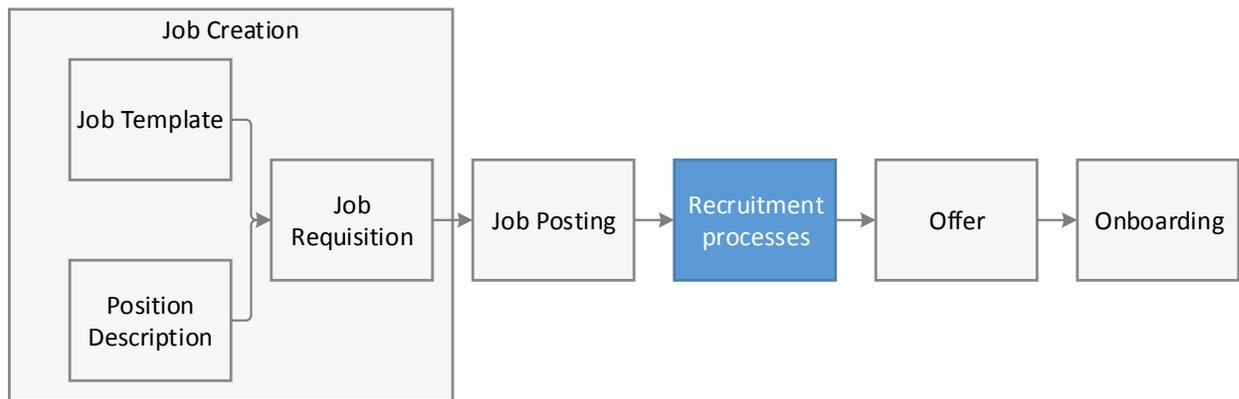
Last modified on	Author	Reason
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### Introduction

This guide provides an overview of how recruiting processes work in CHRS Recruiting and how you can move applicants through the process.

### Process diagram

The high-level process diagram shows where recruitment processes occur.



Recruitment occurs after the job is created, approved, and posted.

### What you will do

- Explain how the applicant status reflects where an applicant is in the recruitment process.
- View an applicant’s status
- Change an applicant's status
- Confirm the status change

## Definitions

Term	Definition
<b>Applicant card</b>	The applicant card is a complete summary of an applicant in the system, including their personal details and application history.
<b>Application status</b>	A single stage of a recruitment process. Campuses pre-determine their recruitment processes based on the type of recruitment. Application status identifies where an applicant is in that process.  Example: First Interview Successful.
<b>Recruitment process</b>	Recruitment processes define the stages that applicants will progress through after they have submitted an application for a job. Each campus has its own recruitment processes for its job types. Recruitment processes are visible system-wide, so they must adhere to the CSU naming convention.  Example: SD - Staff Process

## Overview of recruitment processes

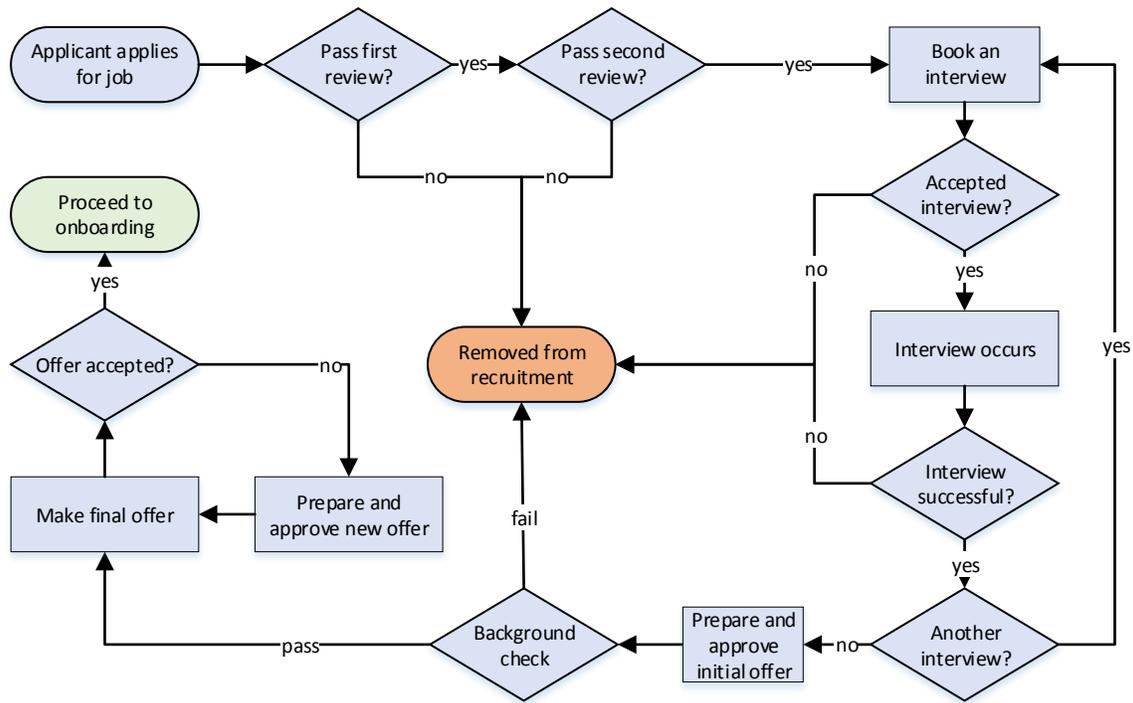
The recruiting process refers to the process through which an applicant is moved from the time the application is received to the applicant being hired.

Each campus has its own recruiting processes for different types of jobs. However, all recruiting processes have some things in common:

- Each recruitment process consists of a set of predefined application statuses. Each applicant is assigned a status within that recruitment process. The applicant's status changes throughout the course of the recruitment to reflect where the applicant is in the process.
- Status changes can trigger actions. For example, if an applicant does not pass an interview, that applicant's status is changed to "Interview Unsuccessful." This status change can be configured to automatically send the applicant an email notification (or an SMS), and the applicant is removed from the recruitment process.
- Actions can trigger status changes. For example, when an applicant accepts an offer, their status automatically changes to "Offer Accepted."
- Application status can be changed manually. A user with the appropriate permission can change the applicant's status at any time during the recruitment process. Status changes can then trigger actions. For example, moving an applicant to the Search Committee Review status notifies the search committee members that applicants are awaiting a review.

Generic recruitment diagram

This diagram shows a generic recruitment process. Your campus processes will differ.



Process steps

1. The applicant applies for a job and must pass initial reviews.
2. If the applicant passes the reviews, the applicant is invited to an interview.
3. If the applicant accepts the interview, the interview is conducted.
4. If the interview was successful, additional interviews might be scheduled.
5. If the applicant succeeds through all interviews, the hiring authority creates an offer.
6. If the offer is approved, the hiring authority conducts a background check.
7. If the applicant passes the background check, the final offer is made.
8. If the offer is accepted, the applicant is moved to Onboarding, and recruitment concludes with the position filled.

Note: If at any point the applicant does not meet the screening criteria, the applicant status records the result, and applicant can be removed from the recruitment process.

## Application statuses

The following table shows the application statuses for the **Base Tenure Track** recruitment process. This process is used as an example: each campus configures these statuses so your campus processes might be different.

Columns:

- Sends email – the status change sends an email to the applicant
- Sends SMS – the status change sends an SMS message to the applicant
- Current Recruitment – the applicant is still being considered for the position

Step	Status	Sends email	Sends SMS	Current Recruitment
1	New	X		X
2	Diversity Check			X
3	Initial Review			X
4	Initial Review Successful			X
5	Initial Review Unsuccessful	X		
6	Invite for Interview Event 1			X
7	Interview Event 1 Accepted	X		X
8	Interview Event 1 Declined	X		
9	Interview Event 1 Unsuccessful	X		
10	Invite for Interview Event 2			X
11	Interview Event 2 Accepted			X
12	Interview Event 2 Declined	X		
13	Interview Event 2 Unsuccessful	X		
14	Invite for Interview Event 3			X
15	Interview Event 3 Accepted	X		X
16	Interview Event 3 Declined	X		
17	Interview Event 3 Unsuccessful	X		
18	Reference Check In Progress			X
19	Reference Check Unsuccessful	X		
20	Prepare Offer - Recommendation to Dean			X
21	Revised Offer			X
22	Conditional Offer	X		X
23	Offer accepted			X
24	Offer declined			
25	Background check In Progress	X	X	X
26	Background Check Unsuccessful			
27	Online offer made	X		X
28	Removed	X		
29	Withdrawn	X		

Step	Status	Sends email	Sends SMS	Current Recruitment
30	Ineligible	X		
31	Incomplete			X
32	Submitted			X

### Hints and tips

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There are several statuses to indicate where the applicant was dropped from the recruiting process. These status show the point in the process where the applicant was no longer being considered.

### Related documents

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[Applicant card](#)

[Application statuses](#)

[Recruitment processes](#)

### View an applicant's status

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Applicant information is confidential and is permissioned only to those who need to have access to conduct the recruitment. With the appropriate permission, you can find the applicant's status in several places.

- On any applicant list is a column that shows the applicant status for all listed applicants. You can find applicant lists from the job, the dashboard, or from the side menu.
- The applicant card also shows the status of a particular applicant.

### When to view an applicant's status

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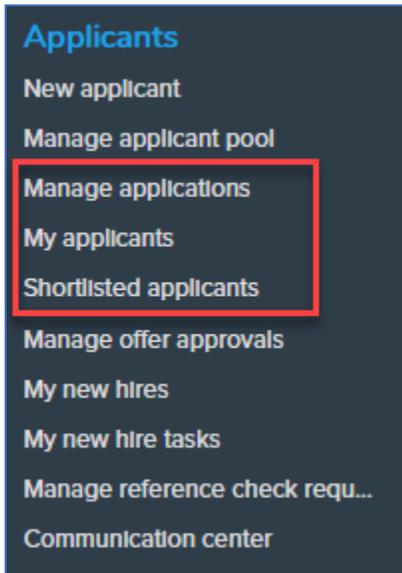
- After an applicant has applied to a job.
- When application is available for you to review.

## How to view an applicant's status from the side menu

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You can view a list of selected applicants by opening one of several applicant management pages from the side menu.

1. Open the side menu.
2. Click any of the following links:



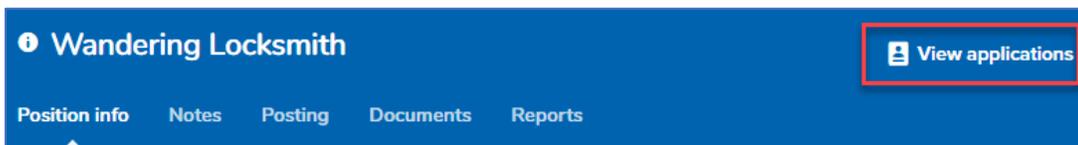
- **Manage applications**
- **My applicants**
- **Shortlisted applicants**

Each of these applicant lists has a **Status** column that shows the applicant's status.

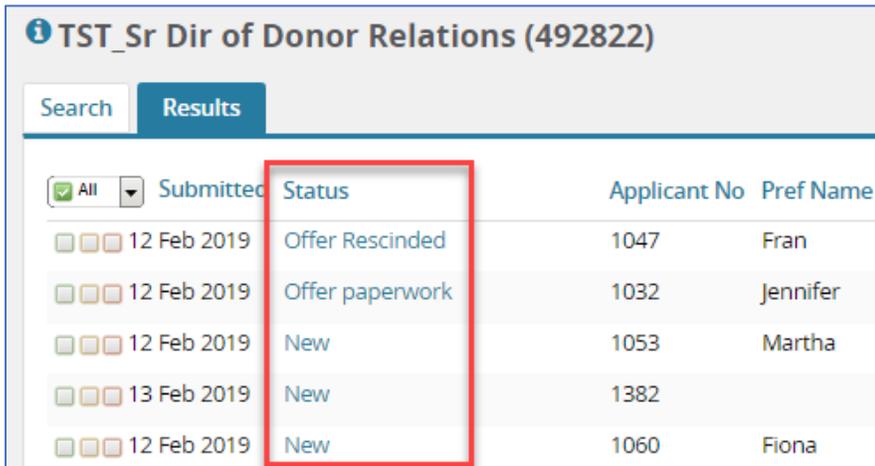
## How to view an applicant's status from a job

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1. On the job requisition, click **View Applications** in the header area.



2. On the applicants list, find the **Status** column.



TST_Sr Dir of Donor Relations (492822)				
Search		Results		
<input checked="" type="checkbox"/> All	Submitted	Status	Applicant No	Pref Name
<input type="checkbox"/>	12 Feb 2019	Offer Rescinded	1047	Fran
<input type="checkbox"/>	12 Feb 2019	Offer paperwork	1032	Jennifer
<input type="checkbox"/>	12 Feb 2019	New	1053	Martha
<input type="checkbox"/>	13 Feb 2019	New	1382	
<input type="checkbox"/>	12 Feb 2019	New	1060	Fiona

### Hints and tips

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- You can click the header in an applicant list to order the applicants by that header. For example, you can use this to find all the Interviewing applicants.
- Applicants that are displayed in an applicant list can belong to different recruitment processes, so they display application statuses from different processes. For example, one applicant might show **Interview 1**, while another might show **Interviewing**.

### Related documents

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[Application statuses](#)

[Recruitment processes](#)

## Change an applicant's status

For some stages in some recruitment processes, a user must move the applicant to a new status. For example, a user might move an applicant to Conditional Offer, which automatically sends a notification to the applicant.

When you confirm a status move, you might need to complete one or more of the following actions:

- Prepare a communication to the applicant.
- Create an event booking invitation for the applicant.
- Specify a reason for the status change.

## When to change an applicant's status

Change the applicant's status whenever you need to manually move the applicant to a different stage of the recruitment process.

## Prerequisites and assumptions

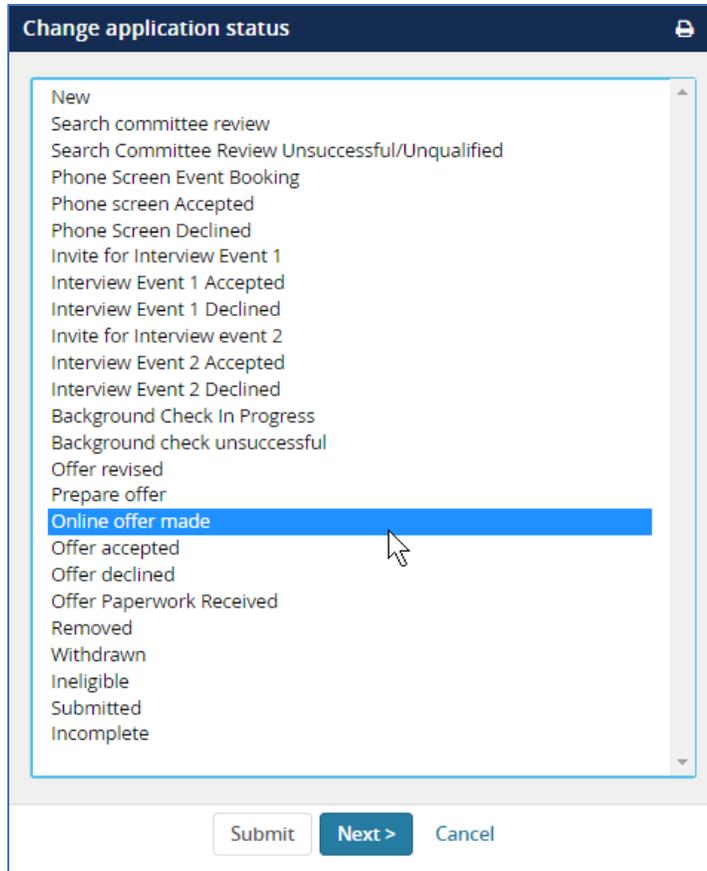
- You have permission to change an applicant's status.
- The status change is not automatically triggered by another action.
- You know how to open the job requisition.

## How to change an applicant's status from the job applicant list

1. Open the job requisition.
2. On the job requisition, click **View Applicants**.
3. Click the status of the applicant to open the **Change application status** page.

Search		Results			
<input checked="" type="checkbox"/> All	Submitted	Status	Applicant No	Pref Name	First name
<input type="checkbox"/>	29 Jan 2019	Removed	1362		Dan
<input type="checkbox"/>	29 Jan 2019	Removed	1363		Jim
<input type="checkbox"/>	29 Jan 2019	Prepare offer	1361		Pete

4. Select the status to move the applicant to.



Change application status

- New
- Search committee review
- Search Committee Review Unsuccessful/Unqualified
- Phone Screen Event Booking
- Phone screen Accepted
- Phone Screen Declined
- Invite for Interview Event 1
- Interview Event 1 Accepted
- Interview Event 1 Declined
- Invite for Interview event 2
- Interview Event 2 Accepted
- Interview Event 2 Declined
- Background Check In Progress
- Background check unsuccessful
- Offer revised
- Prepare offer
- Online offer made**
- Offer accepted
- Offer declined
- Offer Paperwork Received
- Removed
- Withdrawn
- Ineligible
- Submitted
- Incomplete

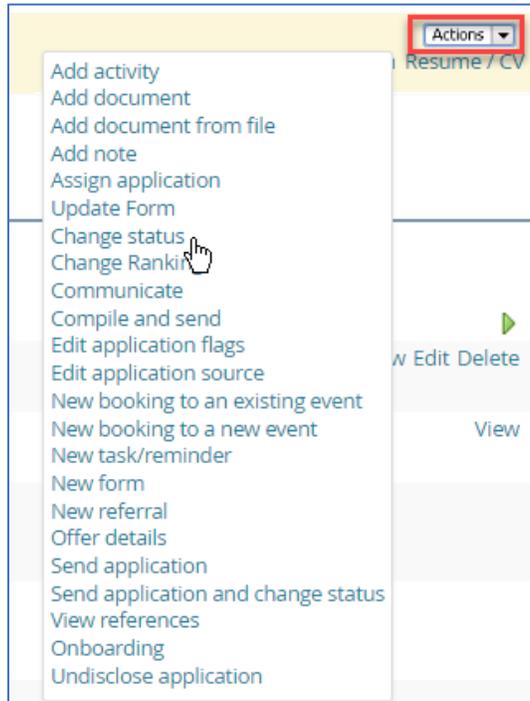
Submit Next > Cancel

5. Click **Next**. The **Confirm status change** page opens.
6. Complete the required actions on the **Confirm status change** page.

## Guidelines

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- If you click **Submit** instead of **Next**, the status is changed, but any actions that are associated with the status change (such as notifications) do not occur.
- You can also change the applicant's status by using the Actions menu on the applicant card.



## What happens next

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You complete the actions on the **Confirm status change** page.

## Related documents

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[Applicant card](#)

[Recruitment processes](#)

## Confirm the status change

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Depending on the status that you are moving the applicant to, you might need to do one of the following activities when you confirm the status change:

- Prepare an email to the applicant
- Create an event booking invitation
- Provide a reason for the status change
- Assign an applicant to a talent pool
- Add a note to the applicant history

**Important:** Some statuses require multiple actions. Always scroll down and complete all necessary actions before you complete the status change.

## When to confirm the status change

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When you change an applicant's status, before the status change completes.

## Prerequisites and assumptions

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- You selected a new status for an applicant.
- You clicked **Next** on the **Change status** page.

## How to prepare an email

You must ensure that the email notification is personalized, properly branded, and accurate.

1. Select your campus's branded communication template.
2. Review the email message.

**Confirm status change**

You are about to move Pete Sneaky to a different status:

From status: Prepare offer  
To status: Online offer made

Communication template: -- No template --

**i** Upon moving into this status, the applicant will have the ability to approve or decline an employment offer for this job.  
Warning: No form has been set against this offer.

E-mail: Applicant:  Yes  No

From:\* No.Reply@csustan.edu  
Subject:\* Application outcome

Message: Merge fields

Dear Pete,  
We would like to formally welcome you to Public Safety - 204000 department in the position of Adventure Locksmith.  
In order to view your employment contract, which outlines the terms and conditions of your employment, please follow the steps below:

**Move now** Cancel

3. Scroll down to add any files to the email.
4. If you want to add other users to the email, do the following steps:
  - a. Click the Yes option next to Additional users from job. A new email interface opens.

**Additional users from job:**  Yes  No

Additional users from Job

<input type="checkbox"/> Department Admin	<input type="checkbox"/> Hiring Manager
<input type="checkbox"/> HR Representative	<input type="checkbox"/> Hiring Administrator
<input type="checkbox"/> Search Committee Chair	<input type="checkbox"/> Search Committee Member

- b. Select the user roles. Click the magnifying glass search button to find users who are not from the job.
- c. Complete the **From**, **Subject**, and **Body** email fields.

- d. Optionally add files.
  - e. Optionally add a delay before the email is sent.
5. Scroll down to complete any other actions.
  6. Click **Move now**.

### Hints and tips for email

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- When sending emails, you can attach files by dragging them into the drag and drop area below the email body.
- When sending emails, you can delay the email delivery by selecting the time from the **Delay e-mail** by field below the email attachment area.
- Each campus has some campus-branded communication templates. The templates use a naming convention that begins with the two-letter campus code. Be sure to select the correct one.

### What happens next

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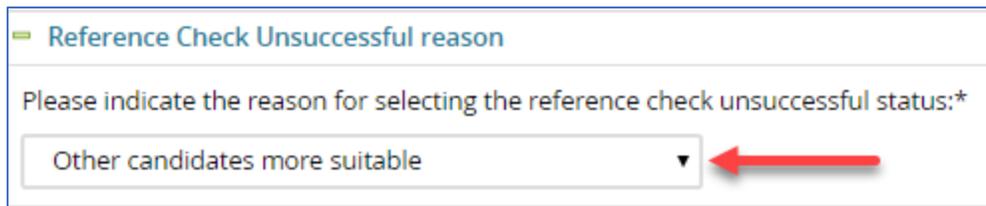
- The applicant status changes.
- CHRS Recruiting sends an email to the recipients after the selected delay.
- The actions are recorded in the applicant's history on the applicant card.

### How to provide a reason

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If a status change requires a reason, a list of reasons is provided for you to choose from.

1. Select the reason from the list.



The screenshot shows a dropdown menu with the title "Reference Check Unsuccessful reason". Below the title is the instruction "Please indicate the reason for selecting the reference check unsuccessful status:\*". The dropdown menu is open, showing the selected option "Other candidates more suitable". A red arrow points to the dropdown arrow on the right side of the menu.

2. Scroll down to complete any other actions.
3. Click **Move now**.

### What happens next

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- The applicant status changes.
- The actions and reason are recorded in the applicant's history on the applicant card.

## How to create an event booking invitation

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If a status change involves an interview event, you can book the event before confirmation.

1. Select whether to allow the applicant to choose the event or select an event from the events calendar. To select an event, the event must already exist in the events calendar.

The screenshot shows a form titled "Create an event booking invitation for the applicant:" with radio buttons for "Yes" and "No". Below the title is a blue banner with a warning icon and the text "This applicant will be invited to attend a Interview 1 event". The form is divided into two main sections: "Event:" and "Event timeslot:". In the "Event:" section, there are two radio buttons: "Allow applicant to choose an event" (unselected) and "Select an event:" (selected). Below this is a search box labeled "Event:" with a magnifying glass icon and a blue bar below it that says "No event selected.". In the "Event timeslot:" section, there are two radio buttons: "Allow applicant to choose the time slot" (unselected) and "Select a time slot:" (selected). Below this is a search box labeled "Timeslot:" with a magnifying glass icon and a blue bar below it that says "No timeslot selected.". At the bottom of the form, there is a question "Accept the booking on behalf of the applicant?" with radio buttons for "Yes" and "No", where "No" is selected.

2. Select whether to allow the applicant to choose the time slot. If you specify the time slot, the event and time slot must exist in the events calendar.
3. Scroll down to complete any other actions.
4. Click **Move now**.

## What happens next

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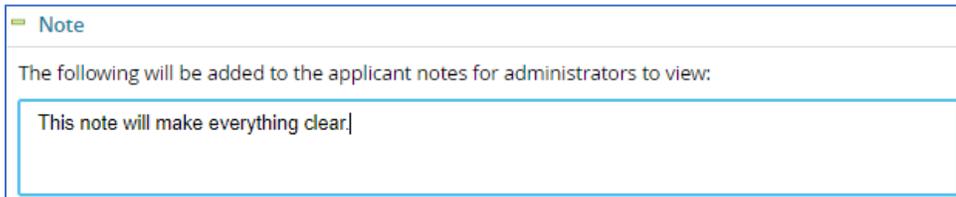
- The applicant status changes.
- The actions are recorded in the applicant's history on the applicant card.
- Depending on your choices, the applicant receives an invitation to the event or is invited to book an event.

## How to add a note to the applicant history

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When you move an applicant to a new status, you can optionally include a note. If you type a note in the note field, that note is added to the applicant's history on the applicant card.

1. Type a note in the notes field.



Note

The following will be added to the applicant notes for administrators to view:

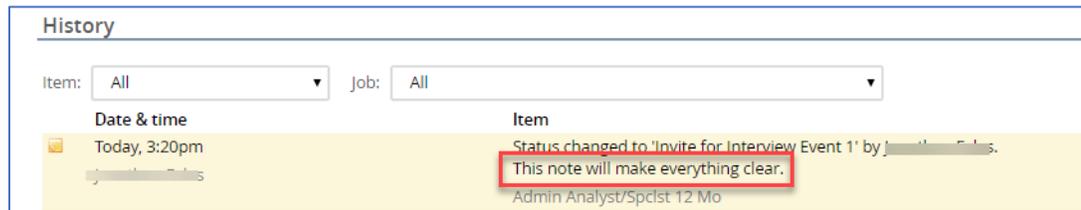
This note will make everything clear.

2. Scroll down to complete any other actions.
3. Click **Move now**.

## What happens next

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- The applicant status changes.
- The actions are recorded in the applicant's history on the applicant card.
- The note is included in the applicant's history timeline on the applicant card.



History

Item: All Job: All

Date & time	Item
Today, 3:20pm	Status changed to 'Invite for Interview Event 1' by [redacted] 5 hrs.
[redacted]	This note will make everything clear.
[redacted]	Admin Analyst/Splst 12 Mo

## Related documents

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[Applicant card](#)

[Application statuses](#)

[Recruitment processes](#)

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