Applicant Tracking Menu

HELP MENU MANUAL

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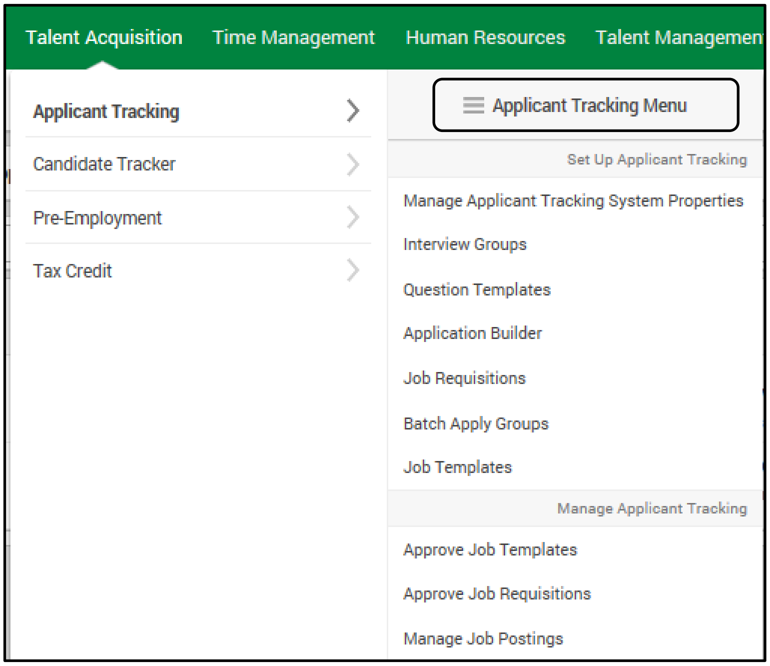
One of the easiest ways to recruit the best is to have the best process. That means managing applicants to ensure you're hiring the best for your company. We want to make sure you're able to search, upload, review and ultimately hire with ease. In this guide, we'll be reviewing how to manage your applicants.

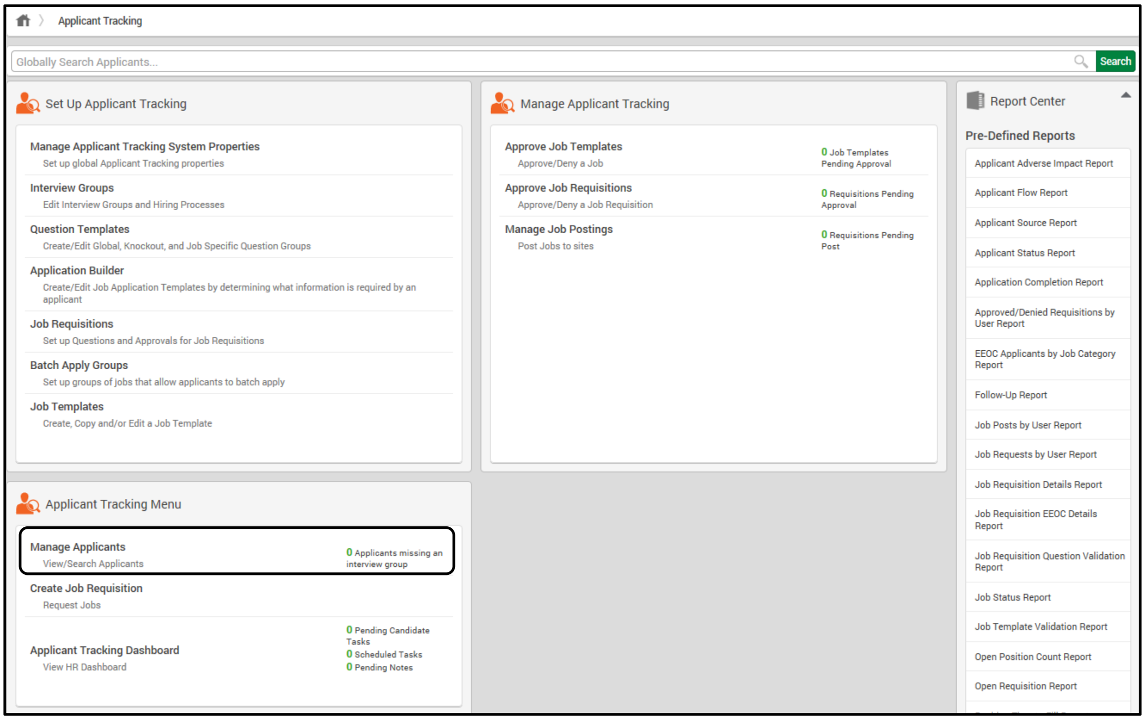
Manage Applicants

To get to the Applicant Tracking Menu, you'll select "Applicant Tracking Menu" from the Talent Acquisition tab.



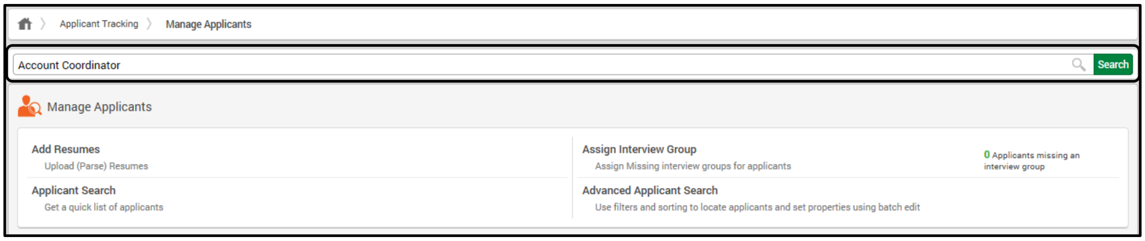
This will take you to the Applicant Tracking Main Menu. If you're needing help with other Applicant Tracking features, such as Applicant Tracking Setup or Manage Applicant Tracking, please visit the other Applicant Tracking manuals on the Help Menu.

Throughout this manual, we're going to take a closer look at managing applicants. Select "Manage Applicants." Through this feature, you're able to access various candidate information and search for specific people who meet the criteria your company requires.



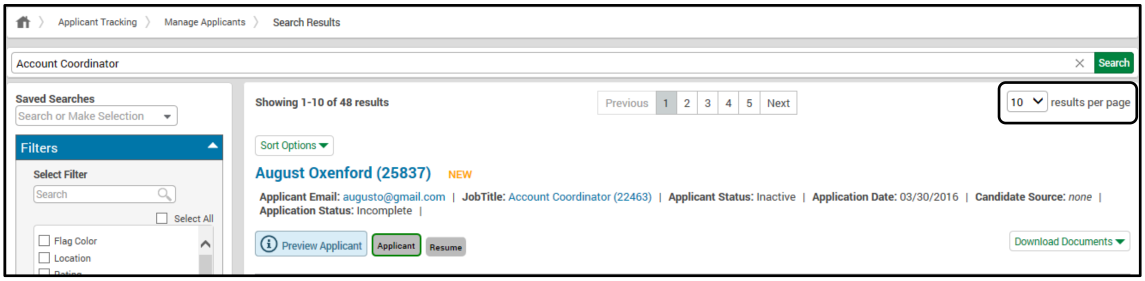
You'll be directed to the following screen. The top search bar allows you to easily search through existing applicants, letting you find the appropriate people and applications with ease! This search functionality is available throughout the Applicant Tracking feature.

To begin, simply enter a value you'd like to view and you'll be directed to the appropriate search results. For this example, we're going to look at all of the Account Coordinator results by typing "Account Coordinator" into the search bar.

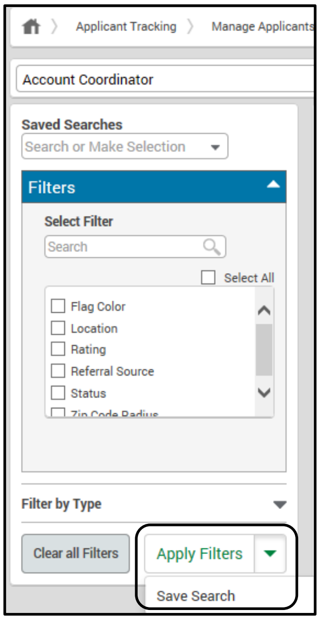


From the results, you'll be able to save searches as well as sort and filter by different options. For this example, we searched for all of the Account Coordinator applicants.

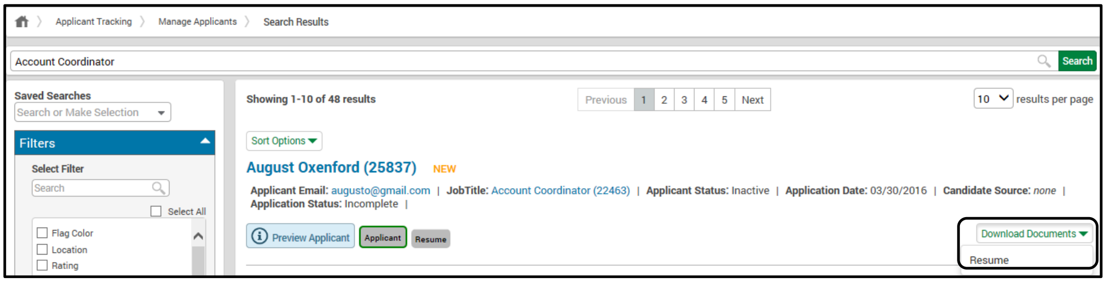
Also, you can decide how many results to review per page by selecting from the drop-down the appropriate results per page number.



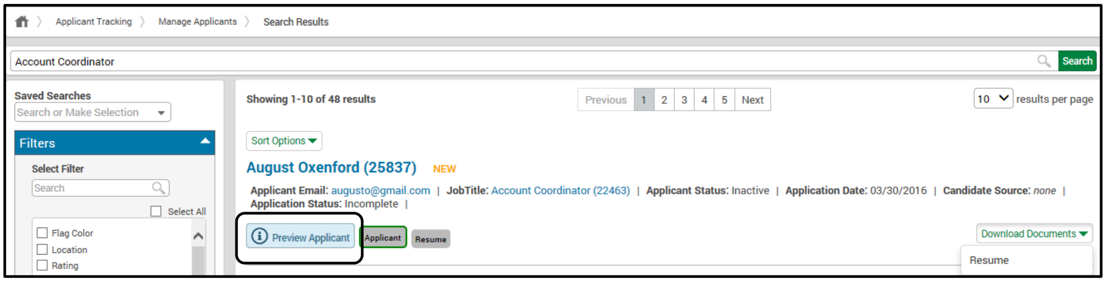
To save a search, under the Filters tab, select "Apply Filters" and then "Save Search."

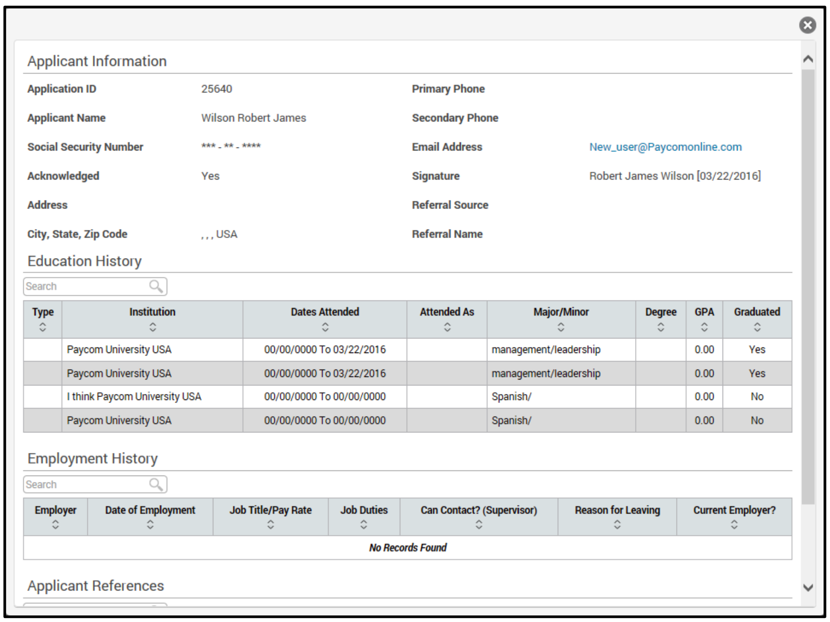


You're able to quickly download an employee's documents utilizing the Download Documents option and selecting any of their uploaded documents such as their resume or cover letter.



You're also able to preview applicants by selecting the "Preview Applicant" option which will take you to a pop-up of information such as their personal contact information, education history, employment history and references.



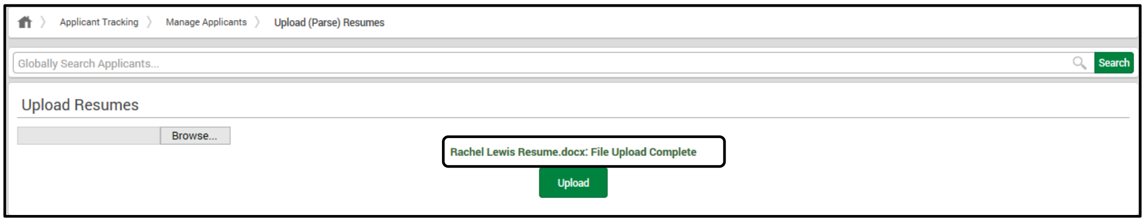


Upload (Parse) Resumes

Uploading resumes is simple and easy. Any resumes uploaded here will appear in the Advanced Applicant Search. Simply select "Browse" and you'll be able to select the file from your computer. Once you've added a file, select "Upload."

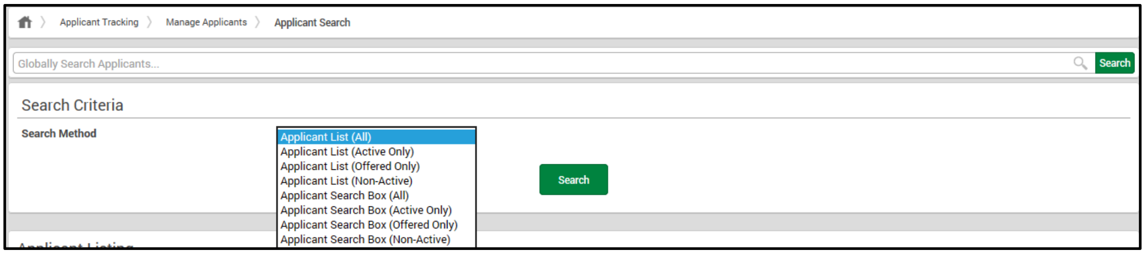
Please note: The applicant must apply for the position within the system in order for them to be hired.

After adding the file, a confirmation will appear on the screen, allowing you to confirm when a file has been added successfully.

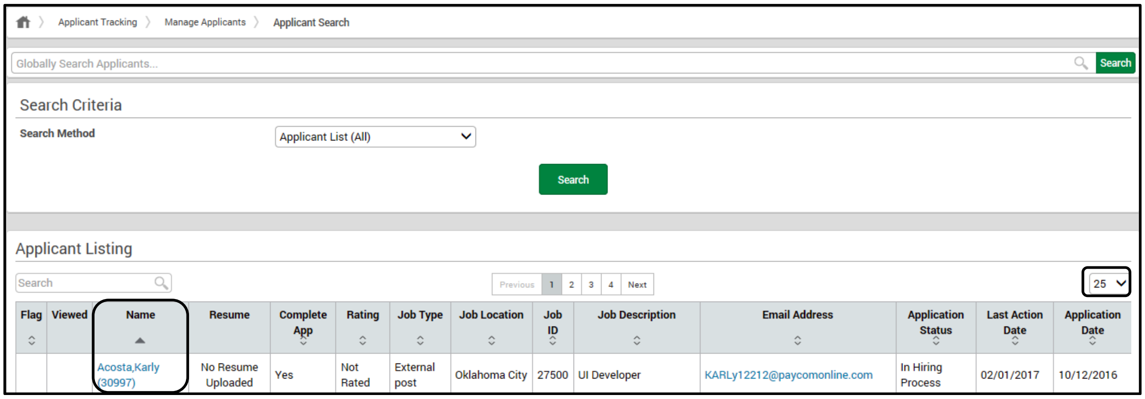


Applicant Search

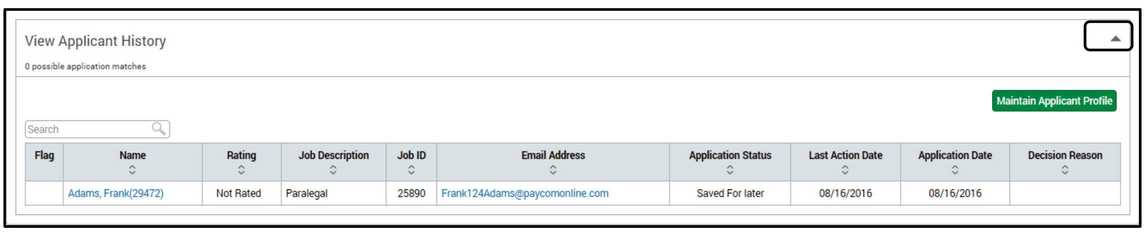
Another way to quickly and efficiently search for applicants is through the Applicant Search. Within the Search Method drop-down, you can filter applicants to view, for example, only active or only offered applicants. If you're not sure the status of the applicant, simply select the "Applicant List (All)" option.



Through this page, you'll able to define how many search results you want to display. You may change it to 25, 50, 75, 100, 250 or 500.



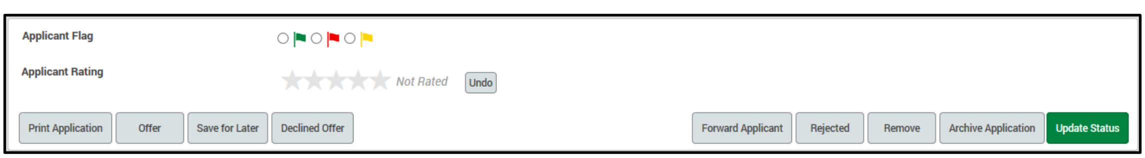
At the top of each application, there is an Applicant History link that can be expanded or condensed by clicking the arrow. This allows you to see which jobs the applicant has applied for in the past.



Select the applicant's name to review their application as well as choose a colored flag to assist in determining where the applicant is in the hiring process.

Utilize flags to confirm where in the hiring process the applicant exists. For example, "Green" means the applicant is a possible candidate for a future position; "Yellow" means the applicant is a possible fit for another position; and "Red" means the applicant is not a fit for the company. Decide among your users how to best utilize the flags and decide what they will mean.

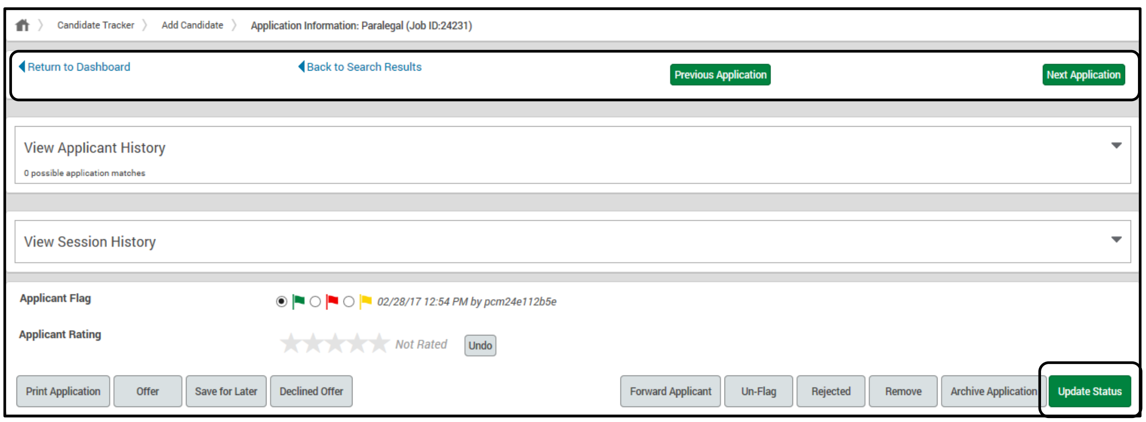
You can also utilize a star rating system to mark the candidate on a scale from one to five stars.



Once the appropriate color flag and/or stars are chosen, select "Update Status." The flag will be displayed next to the applicant's name in the Applicant Search screen as shown on the previous page, as well as in the Applicant Tracking Dashboard. The star rating is visible in the Advanced Applicant Search and Advanced Start Report.

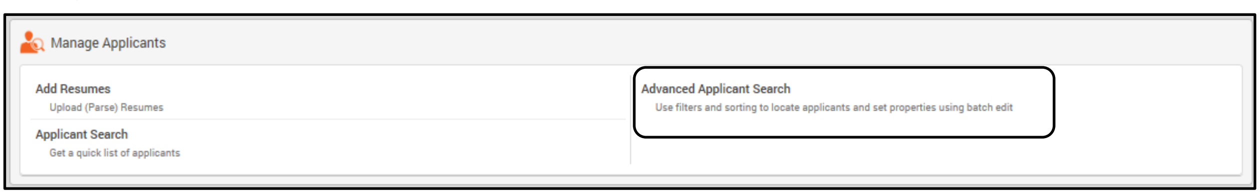
		Tyler,John(30328)	No Resume Uploaded	No	4	2/0	HR Assistant 2	External post
		Acosta,Karly(30997)	No Resume Uploaded	Yes	Not Rated	0/0	UI Developer	External post

Also on this screen are several navigation options at the top that allow you to quickly move from one application to the next without having to return to any of the menu screens. These links are: Return to Dashboard, Back to Search Results, Previous Application and Next Application. Be sure and select "Update Status" if any changes are made on the application before moving to the next application.



Advanced Applicant Search

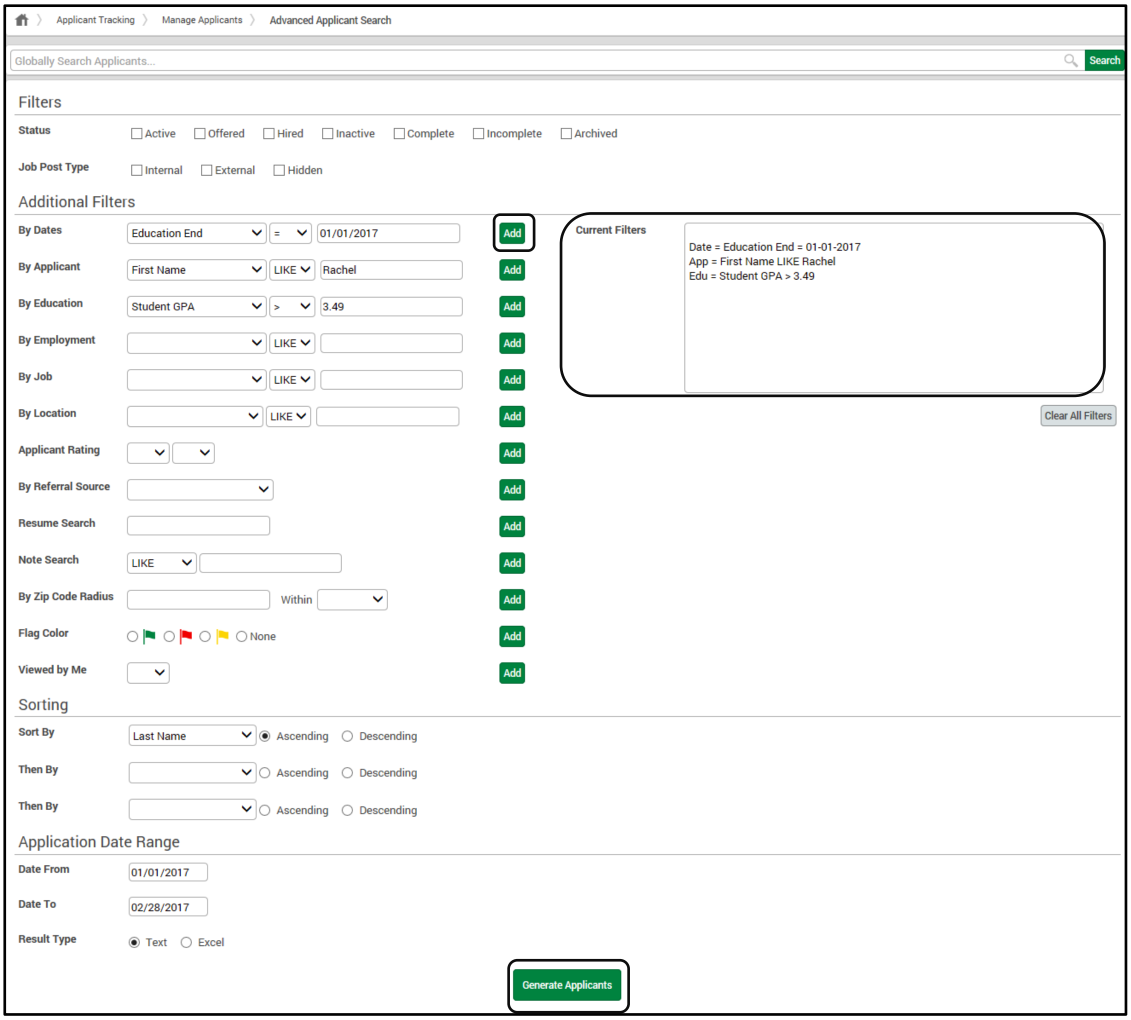
The Advanced Applicant Search feature allows you to use multiple search options to find an application. You can do a keyword search for information on any résumé that has been parsed through the Advanced Applicant Search. Select "Advanced Applicant Search" from the Manage Applicants Menu.



There are several filter options within the advanced search. You can filter by: status, job post type, dates, applicant information, education, employment, job flag color and viewed by me status. To filter items, check the boxes or select the items from the drop-down and select "Add." The filters included will appear in the "Current Filters" box.

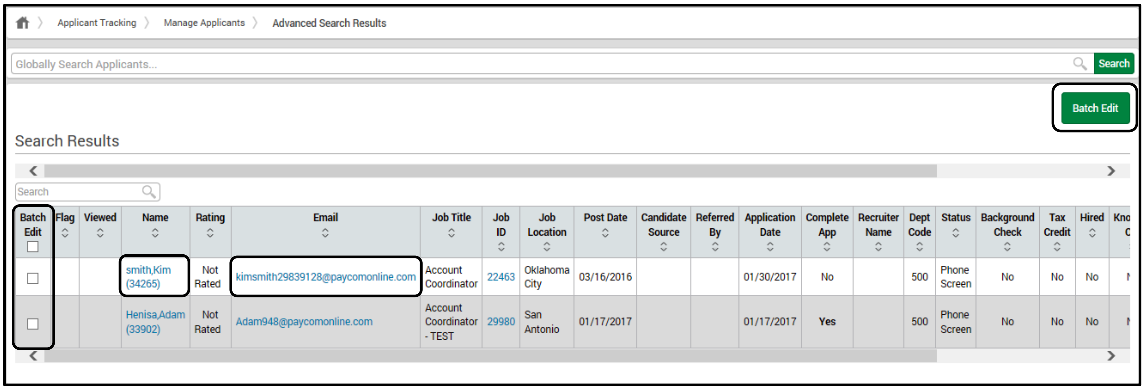
Note: Selecting multiple filters means a candidate must meet all selected filtered criteria to be included on the next screen.

Next, you can sort the information by several options in the drop-down menus. The date range is based on the day the candidate started the application. Select "Generate Applicants" when finished adding filters and deciding on sort specifications.

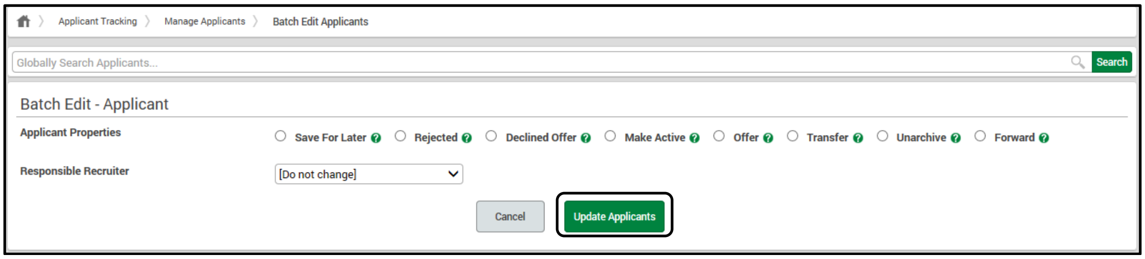


The information from your search will be displayed as below. Select the applicant's name to view their application or click on the email to quickly send an email.

Users with All Levels or Management and Approvals access have the ability to batch edit a group of applicants. Check the box next to the name(s) of the applicants you would like to edit and select "Batch Edit."



When batch editing, you can save them for later, reject, decline an offer, make active, forward, unarchive, transfer or make an offer to multiple candidates at once. Select the option you prefer and then select "Update Applicants."



Save For Later: Removes applicant from hiring process but allows them to reapply or update their existing application.

Rejected: Candidate will be removed from application process and email address blocked from reapplying for the same job posting.

Declined Offer: Applicant has declined an offer from the company for this position.

Make Active: Adds applicants back into the hiring process.

Offer: Move applicant to "My Offered Candidates" tab on the dashboard and gives ability to run background checks, tax credits or send to payroll.

Transfer: Copies existing applicants to additional open jobs.

Unarchive: Unarchive previously archived applications.

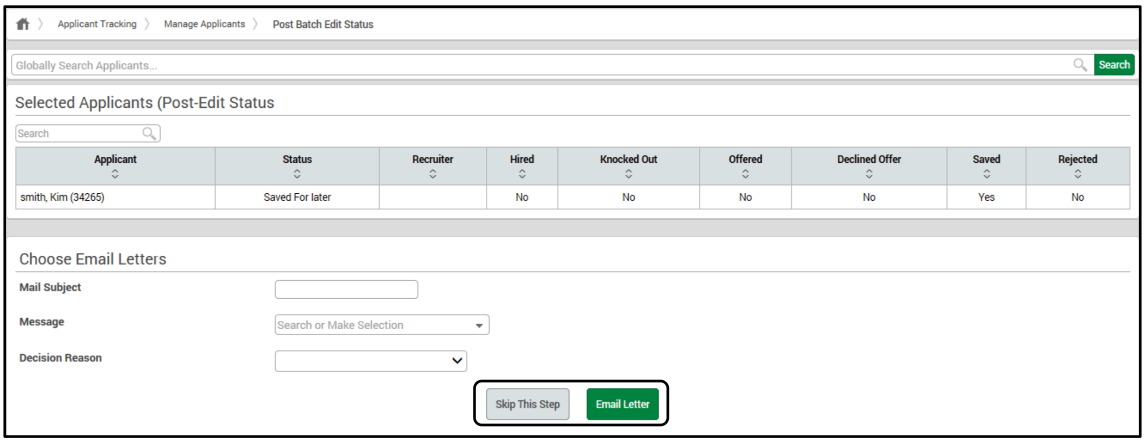
Forward: Allows users to forward the application and resume files to other users.

Responsible Recruiter: This drop-down is available if you would like to select a different recruiter responsible for the applicants. The drop-down defaults to "Do Not Change."

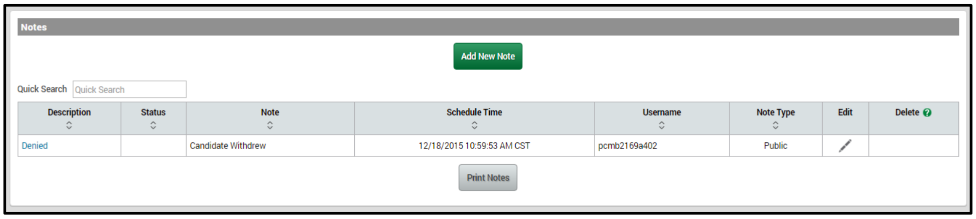
Once you have edited the applicants, you will see their new status below. From here, you can email multiple candidates at once and/or add a decision reason.

Enter the Mail Subject and select the appropriate predefined email message according to the applicants' new status. Message options are available in the "Message" drop-down. *Note: Creating email messages is covered in the Applicant Tracking Setup Process manual on the Help Menu*.

Select "Email Letter" to send an email message or if you are adding a Decision Reason. Select "Skip This Step" to continue without sending a letter.

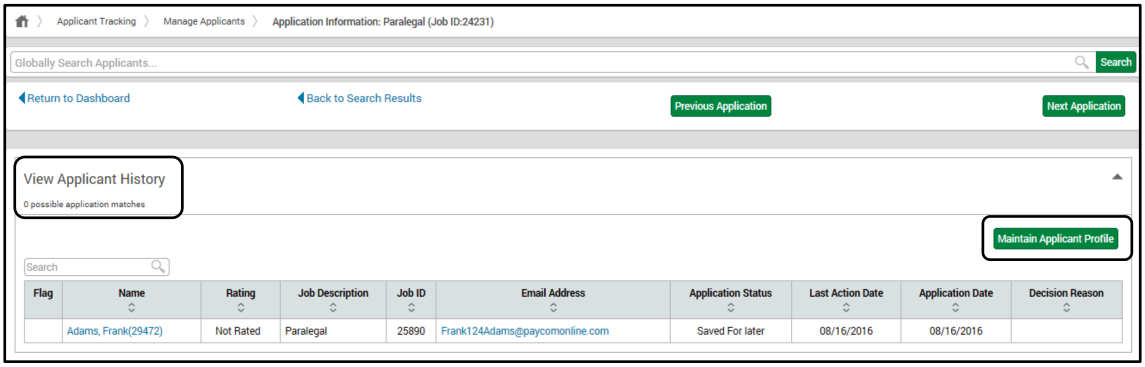


After making a decision using the "Batch Edit" feature, the decision reason selected will display as a public note. This allows users to see what decision reason was made to the application.



Managing Duplicate Applications

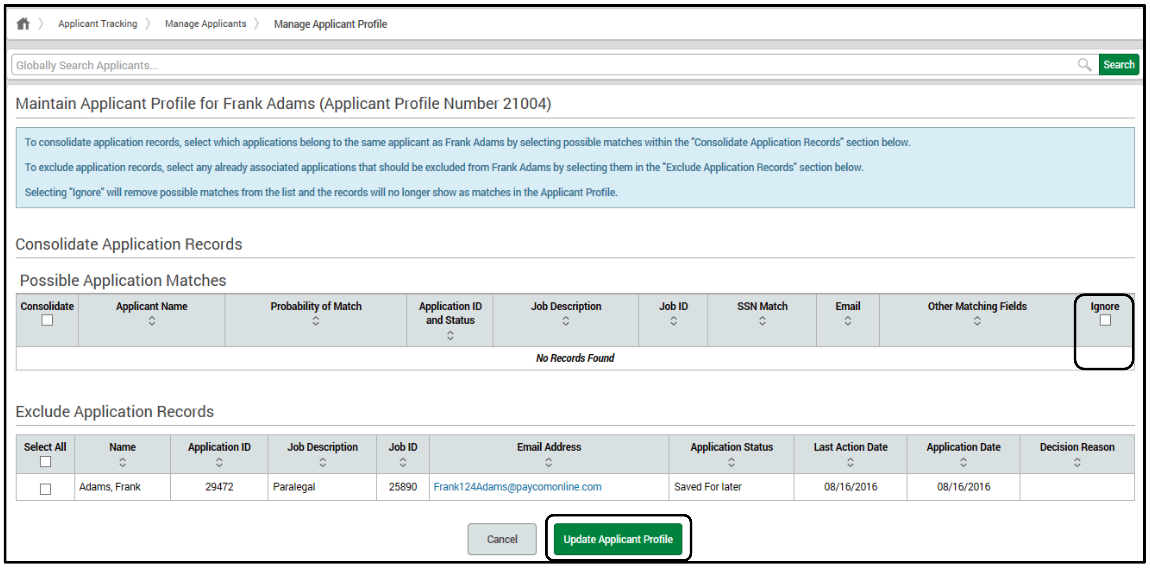
The “Applicant History” section allows applicant associations other than the same email address. This gives you the ability to consolidate or split applicant records, something that can prove beneficial when applicants have applied using multiple email addresses. With this feature, you can combine applications that were used to avoid knockout questions or split applicants if a husband and wife share the same email address to show they’re separate applicants. Expand the Applicant History section and then click “Maintain Applicant Profile.”



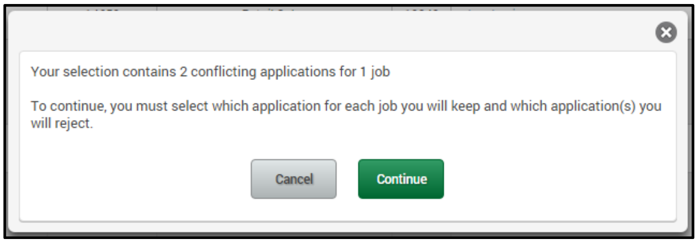
Now, you’ll be able to review any applicant records that have a high or moderate probability of being the same person depending on any matching fields. Fields such as Social Security number matches put an applicant in the high probability match. Other identical field quantities will also be displayed. To combine records, check the applications that should be associated with this applicant and then click “Update Applicant Profile.”

The same process can be completed to exclude applications from the Applicant Record. This can be done by selecting any applications in the bottom section of the screen and then clicking “Update Applicant Profile.”

Matches will display in this screen unless the “Ignore” checkbox is enabled on a record when “Update Applicant Record” is selected.



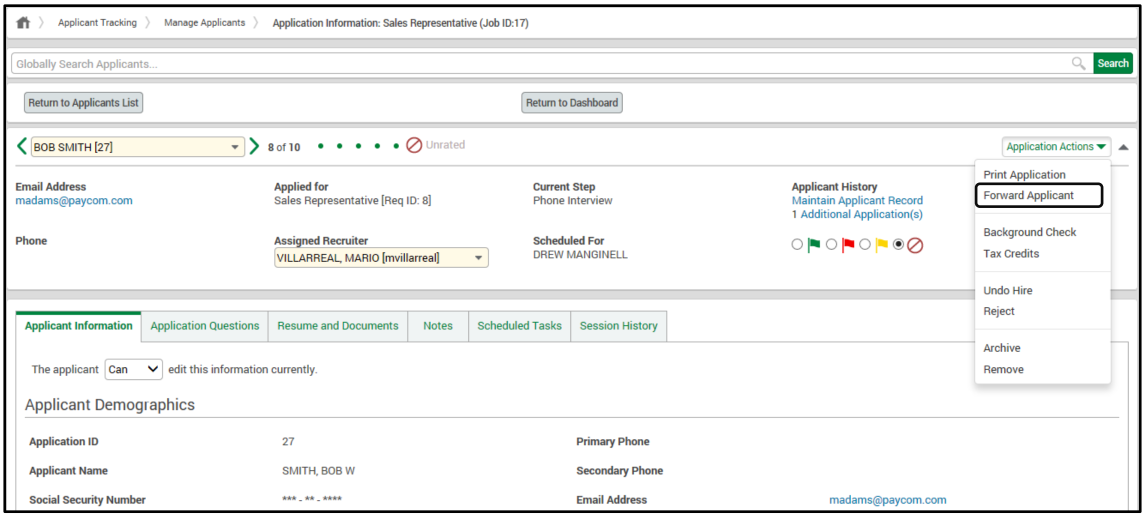
If there are conflicting applications, users will be notified. A pop-up box allows you to determine which of the applications will be kept. The other applications will be declined automatically. No email will be sent to the applicant when these applications are declined in the event that all applications are valid but only one application is needed.



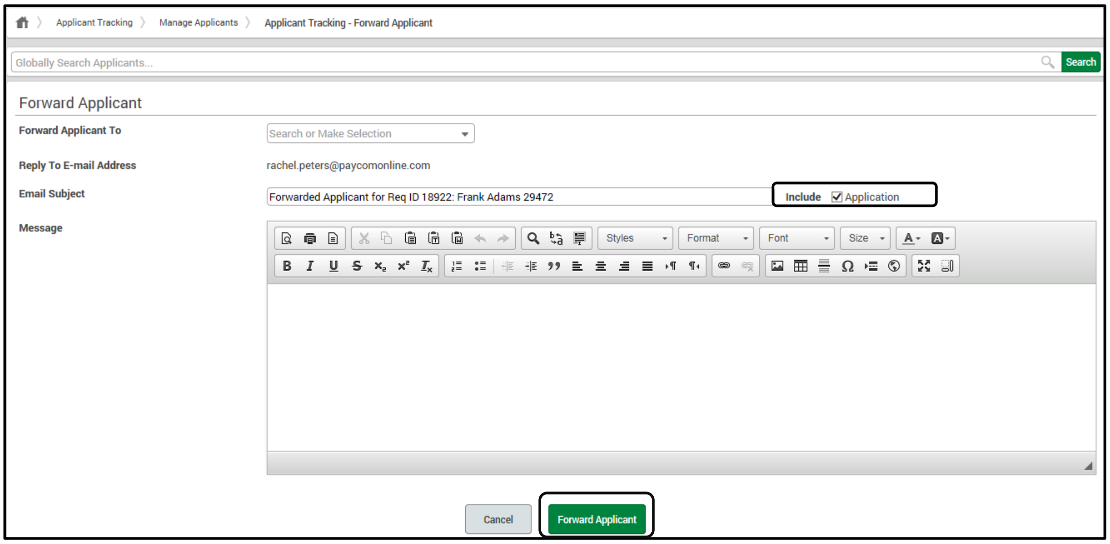
Then, you'll be taken to review each conflicting application for each Job ID. Clicking "Previous/Next Application" will allow you to view the applications for that Job ID for the selected records. When you find the application you wish to keep, click "Set as Application of Record." This will set the current application as the official application and decline all other applications for that Job ID. After this process is completed, the Applicant History will contain all of the newly combined records.

Forwarding Applications

If need be, you can forward applications and resumes to other users within the Paycom system. The application and any documents marked as a resume can be attached to the email as a PDF and forwarded to users who have a valid email address entered in Form 3. The email is editable and can be sent as a batch function. To generate the email, select "Forward Applicant" from the Application Actions drop-down.

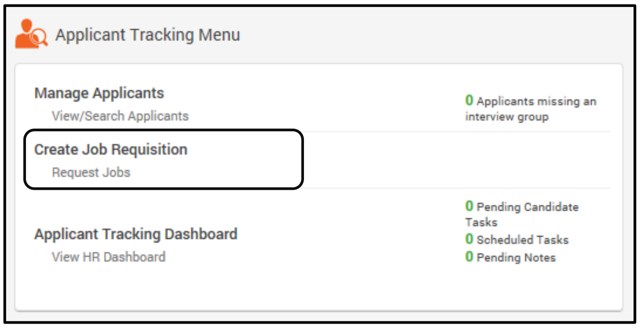


You have the option to limit what information is sent, including the application, resume and salary information. Select the user to forward the application to from the first drop-down menu. If you would like to include both the resume and application, check the respective boxes. Then, enter a Message in the text box and format it with the tools available. When finished, confirm that you want to "Forward Applicant."



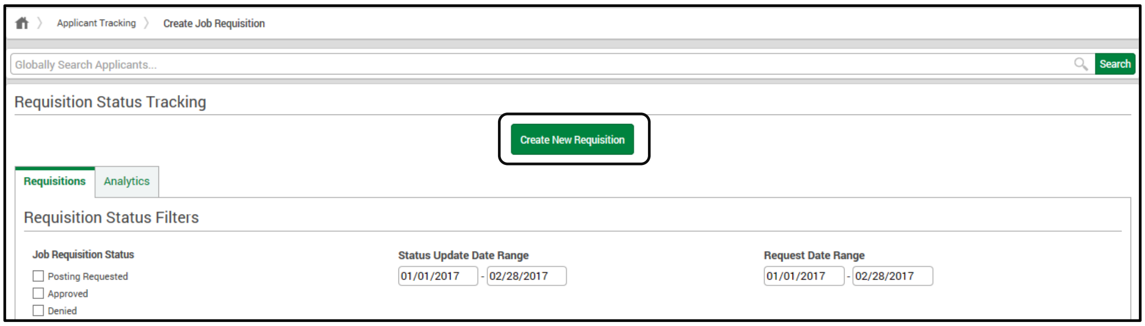
Request a Job Post

If a position needs to be filled, replaced, or is a new position, the hiring manager can create a job requisition. Once the requisition is created, it will be sent to the next level for approval and posting. To request a job, select "Create Job Requisition."



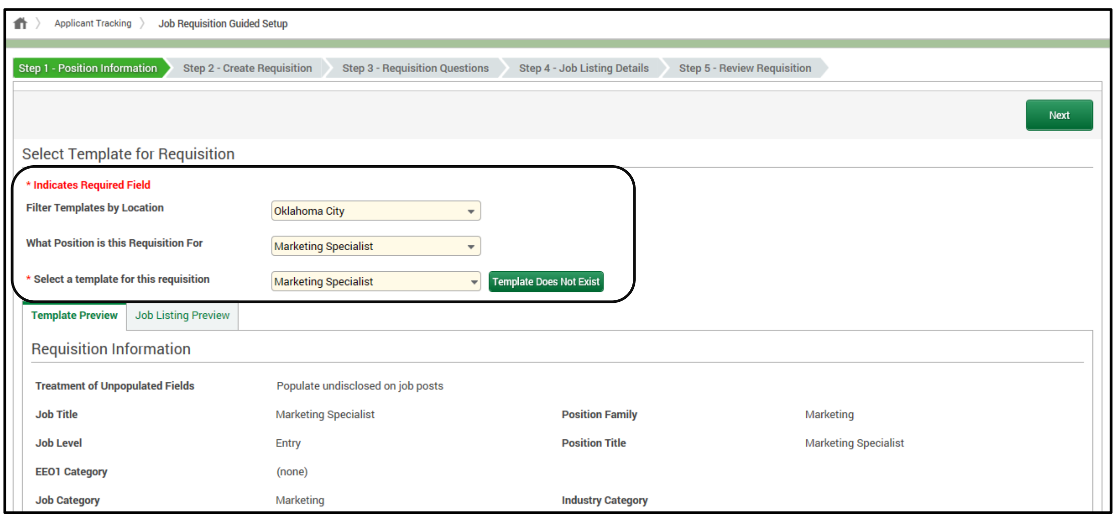
From here, you can filter, search and make changes to existing requisitions, while the Analytics tab provides charts and graphs to suit your reporting needs.

To create a new requisition, select "Create New Requisition."

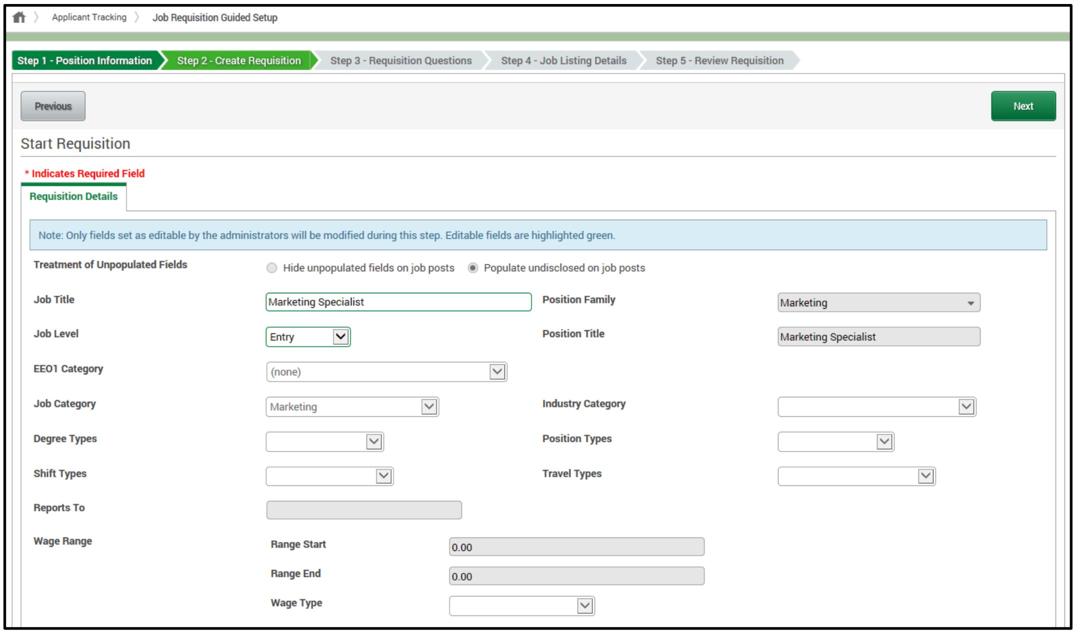


You'll be directed to a five step guided setup process. Within step one, you'll enter the Position Information. First, you'll filter the available templates. Designating positions and locations will reduce the probability of error. Also, you can view the Job Template and current job listings attached to the template.

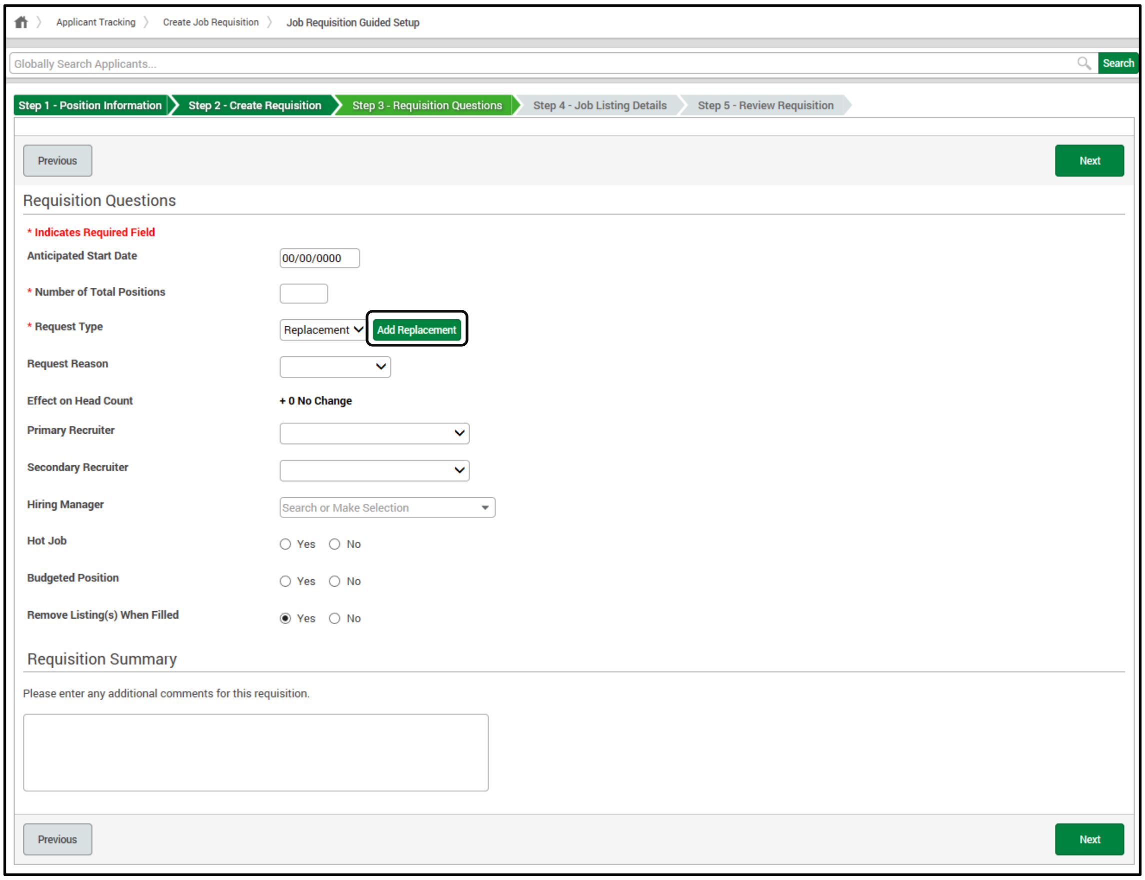
Please note: If you have a newly created department or position where a template does not exist, make sure your recruiting team added that position in Position Management prior to selecting and creating a new template.



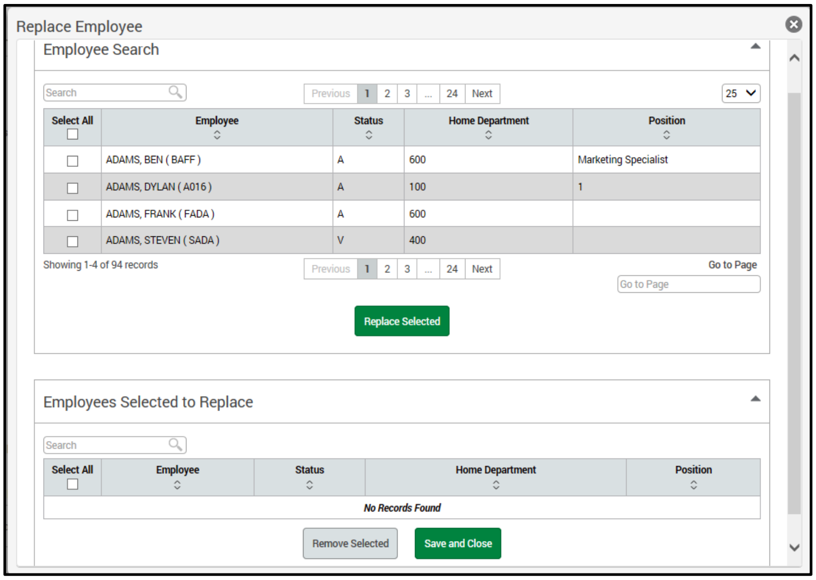
Within step two, you'll create the requisition. You can only make changes to the boxes that are highlighted in green. The editing options were determined in the initial Job Template setup from the Applicant Tracking Main Menu. If you need to edit static text, contact your recruiting team, who determined the editable access for the template.



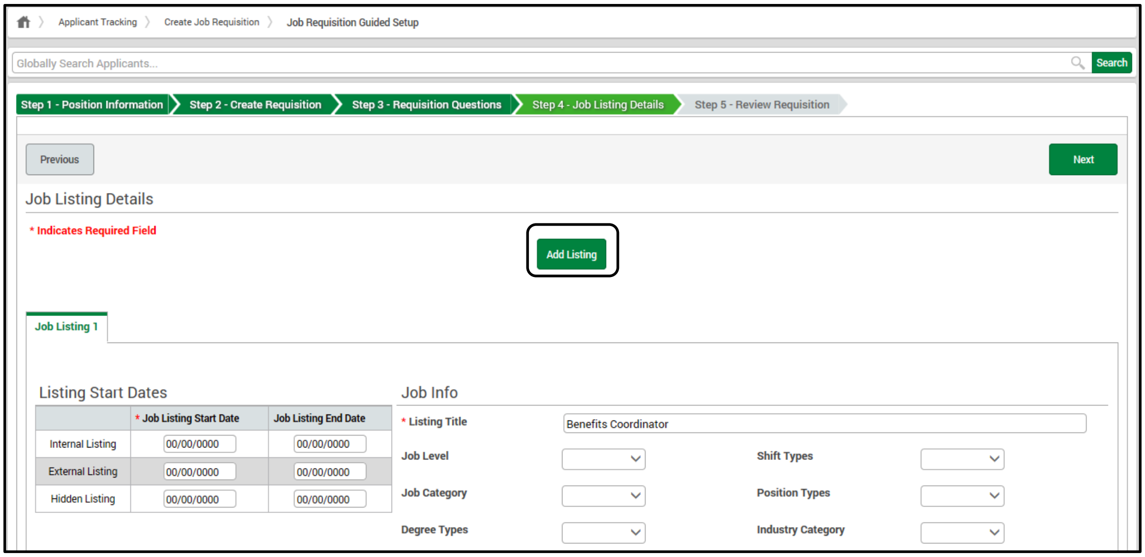
Within step three, Requisition Questions, you can designate an Anticipated Start Date for applicants. This is helpful if a new employee will be going through a scheduled training program upon hire. Effect on Headcount allows you to view the impact this requisition will have on the organization's overall headcount for reporting purposes. The Hiring Manager section allows you to search for any active employee in the organization. You can indicate if a job requisition is considered a Hot Job (higher priority to be filled quickly), which will put the requisition at the top of your career page for improved visibility. To specify the replacement, select "Add Replacement."



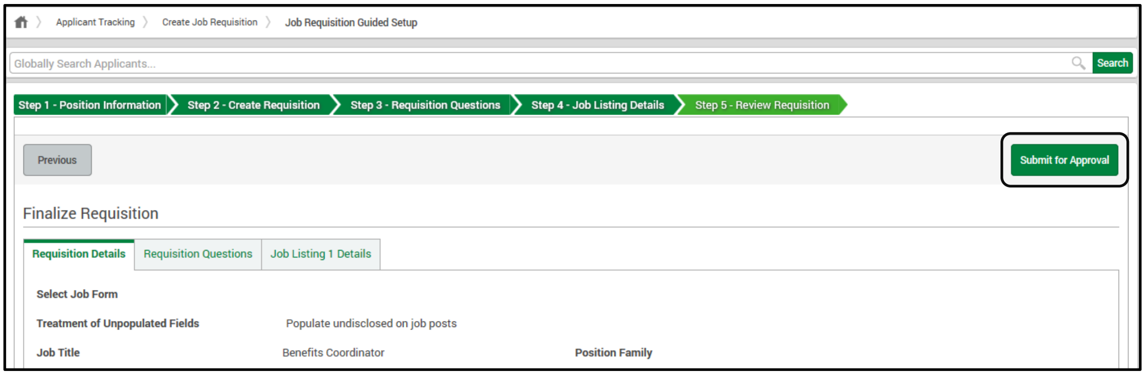
From here, you are able to select which employee is being replaced by this job requisition. This is useful for reporting purposes when a company wants to know what the hiring need is and/or who is being replaced.



Within step four, Job Listing Details, you can set up internal, external and hidden listing start and end dates. Also, you can create multiple listings for the same Job Template, for example, if listings advertise different job descriptions or titles. To do this, you'll select "Add Listing." All options are read-only.

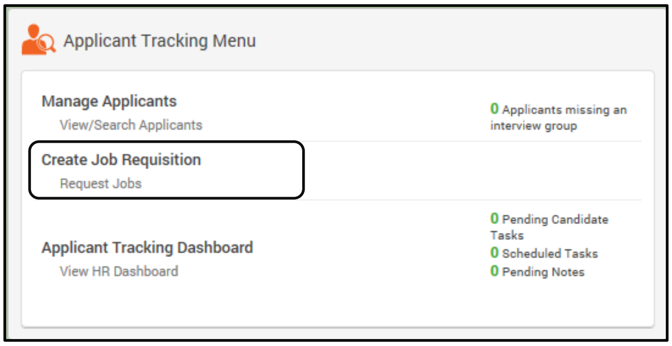


Within step five, Review Requisition, you'll review and submit the requisition. After selecting "Submit for Approval" it will be sent to the Approval Group associated with that Job Template. Depending on the Approval Group notification settings, users may receive emails or notifications in the Applicant Tracking Menu.

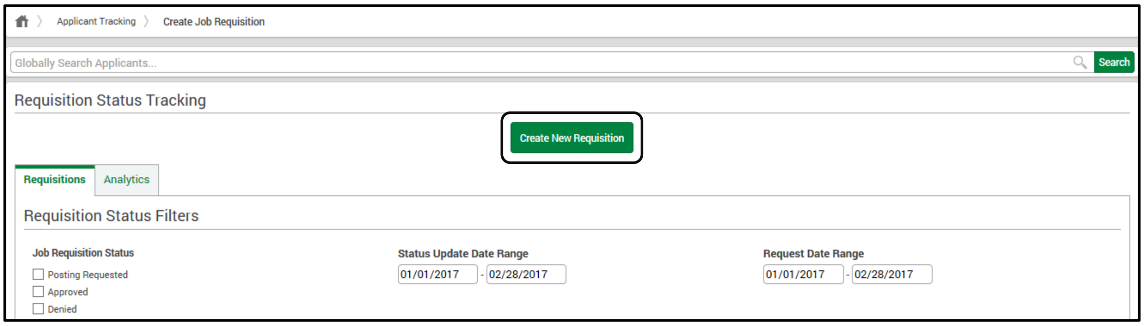


Requesting a New Template

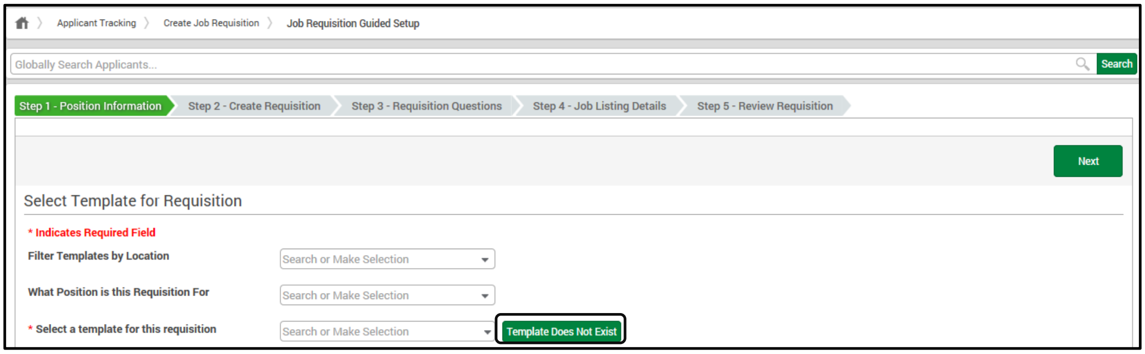
You may want to request a Job Template that does not already exist. For example, if there's a new hiring need within the organization that would prompt a hiring manager to request a new job. In this case, select "Create Job Requisition."



Then, click "Create New Requisition."

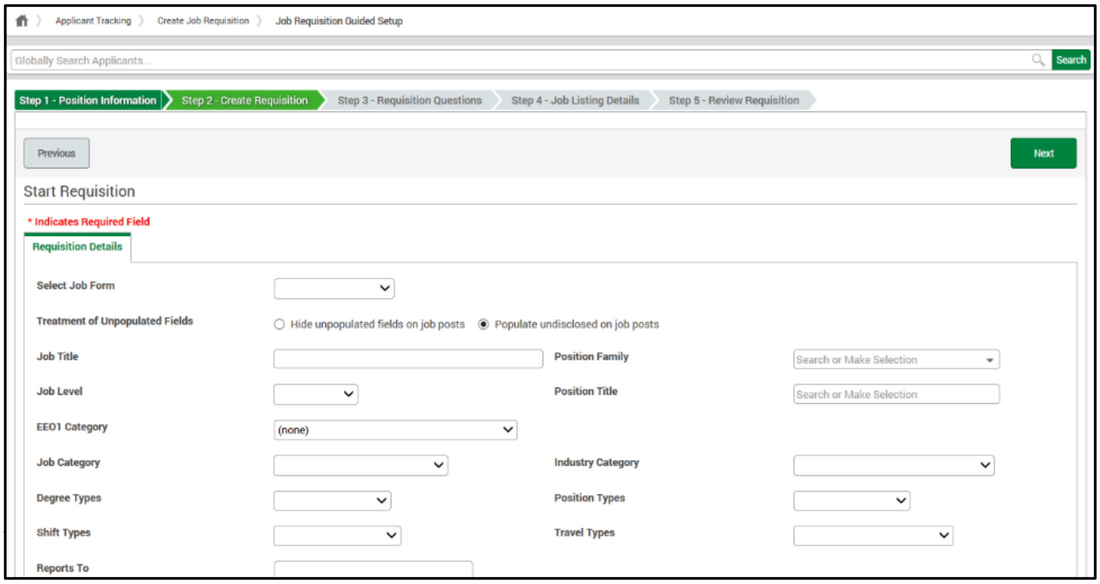


To request a new template, select "Template Does Not Exist."



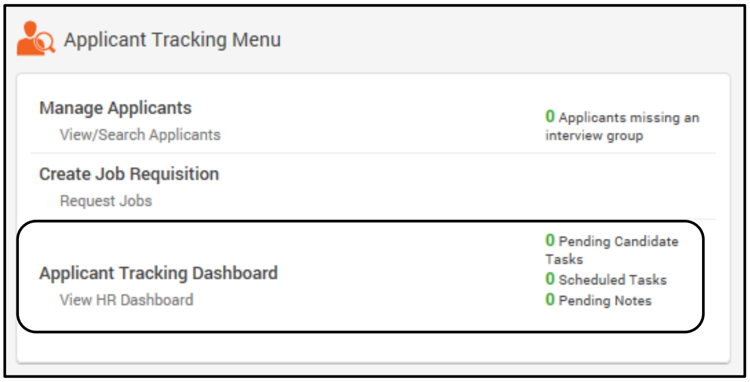
From here, you're able to request a Job Template that is not currently set up in the system. This is useful if you have a newly created department or position that has not been posted to the career page. Go through the same steps for requesting an existing Job Template, except now you will be able to edit each piece of the Job Template to suit your needs. This functionality eliminates recruiter activity that takes place outside the application, while also reducing the time to create, approve and post requisitions.

Please note: New positions must be set up in Position Management prior to requesting a blank job requisition.



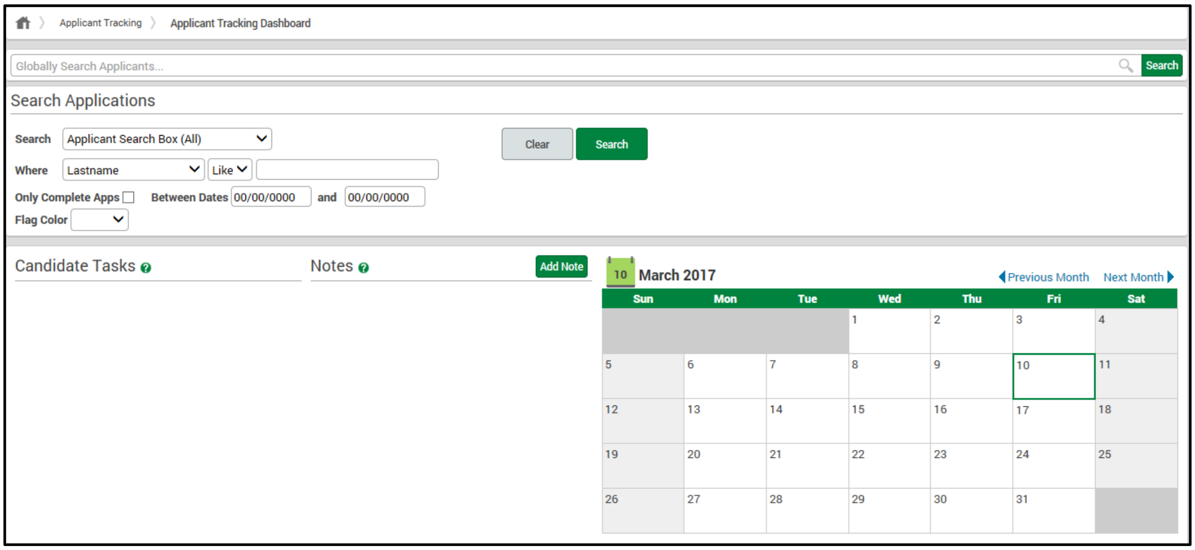
The Applicant Tracking Dashboard is where you will administer day-to-day functions of your hiring process. Any pending tasks or notes will be displayed next to the Applicant Tracking Dashboard link.

Within the Dashboard, you have the ability to view applicants by status in the hiring pipeline, schedule tasks and interviews, view and change the status of an applicant. Depending on your user access level, you will also be able to "save for later," "make an offer," "reject" and "run background checks" for applicants. To view or access the Dashboard, select "Applicant Tracking Dashboard."



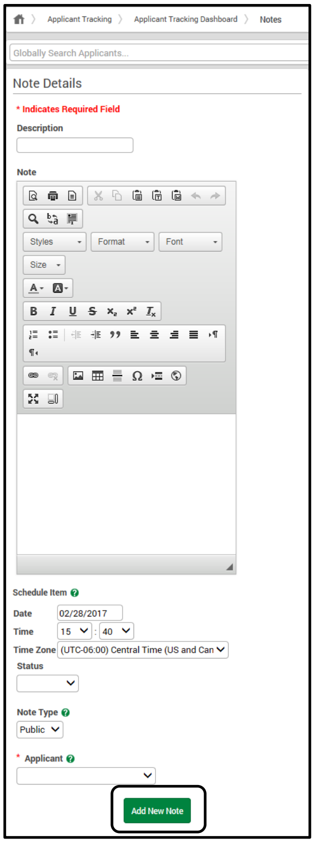
Within the Applicant Tracking Dashboard, you'll notice the normal search bar at the top as well as specific search functions that allow you to refine what applicants you're looking for.

Next, you'll notice the Candidate Tasks section where you can view the tasks for the day or select another day from the calendar to view tasks for that date.



The Calendar feature allows you to click on a month or day to see the scheduled tasks and notes for that particular day.

Adding notes is a great way to set reminders of tasks to complete. You can set notes as public or private and add them for any day needed. To add a note, select "Add Note." Then, enter the following information:



Description: Enter a description for the note.

Note: Body of the note.

Schedule Date: Enter the date and time this date will appear on the Dashboard Calendar.

Status: Choose from Completed or Pending.

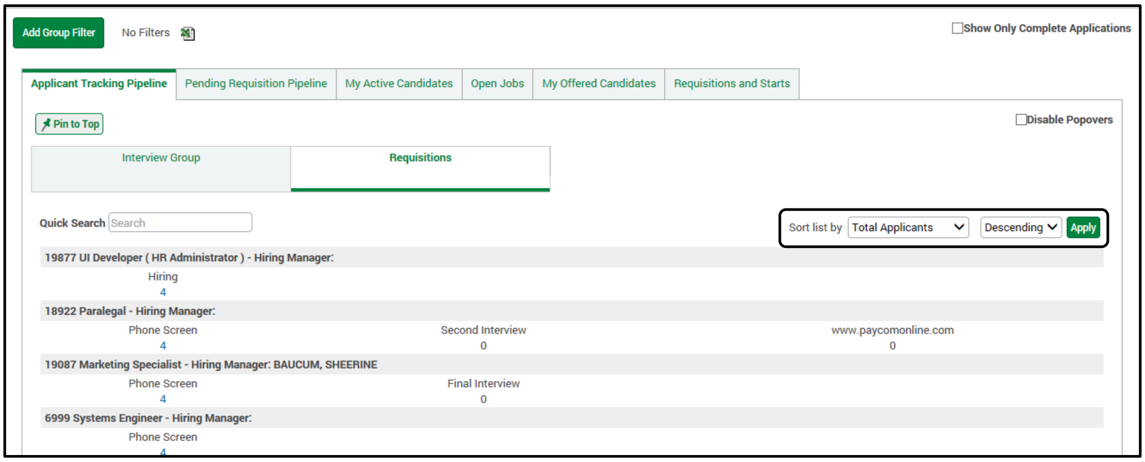
Note Type: Choose from Public or Private. Private means only you can see the note. Public means everyone with access to the applicant's information can see the note.

Applicant: Choose the applicant's name from the drop-down, this will tie the applicant to the note and be displayed on the Dashboard Calendar.

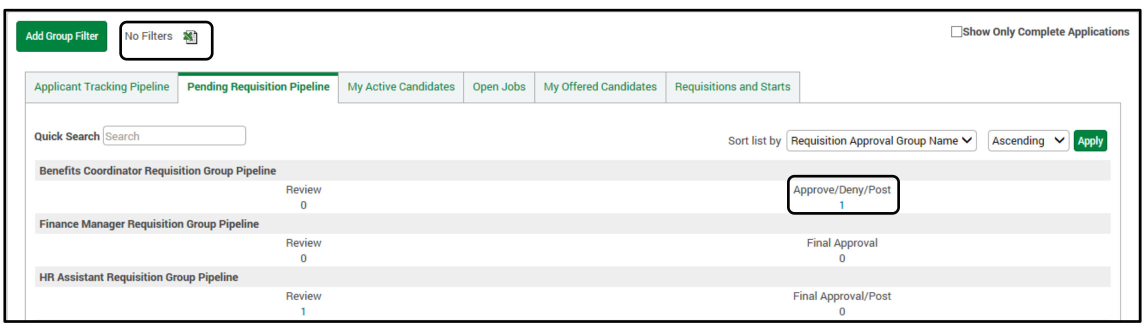
When finished, select "Add New Note."

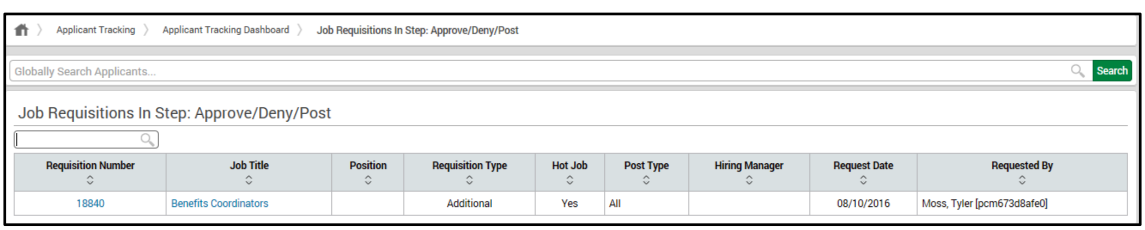
Applicant Tracking Pipeline/Pending Requisition Pipeline

At the bottom of the page, there are multiple tabs of information. These pipelines will demonstrate the hiring process specific to a department or job. The first tab, "Applicant Tracking Pipeline," shows the Interview Group and Requisitions of all your positions. You can utilize the Sort list by option to determine how you want to view the content such as sort by "Total Applicants Descending" and then clicking "Apply."



The "Pending Requisition Pipeline" tab displays any pending requisitions that you need to review. Click on the blue number to see a list of active applications within that step and to be taken to the review page. Clicking on the blue Requisition Number or Job Title will take you to another page in which you'll be able to Approve, Deny or Post the job.

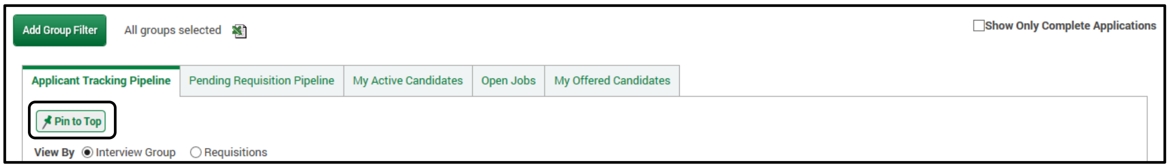




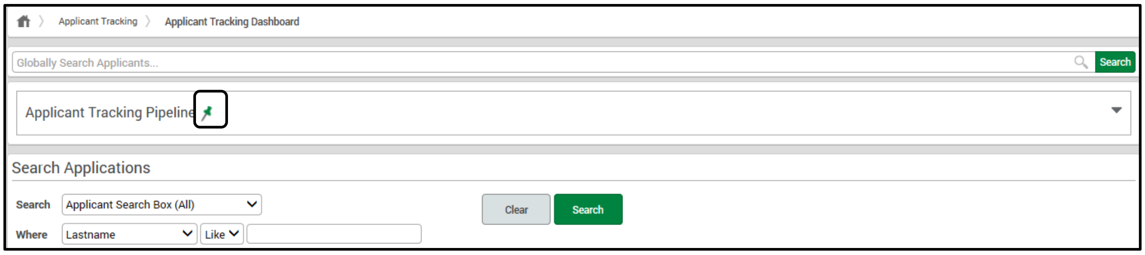
You can move from the Applicant Tracking Pipeline to the Pending Requisition Pipeline by selecting their respective tabs.

Please note: You can export requisition data from any tab in the Dashboard using the Excel button, located in the top, left-hand corner of the pipeline.

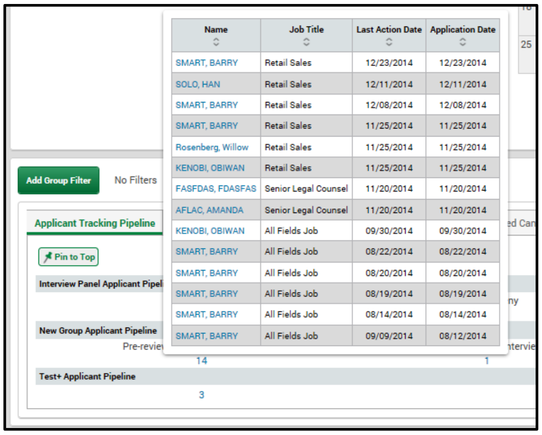
You can pin your Applicant Tracking pipelines to the top of your screen so they will follow you throughout the Applicant Tracking and Candidate Tracker features. This allows you to manage your pipelines and frequently check the dashboard for any updates with ease. Simply select "Pin to Top" from the Applicant Tracking Pipeline tab.



This places the pipeline at the top of your screen. This feature works on any page within Applicant Tracking or Candidate Tracker. To remove the pipeline from the top of your screen, click the pin icon located in the Applicant Tracking Pipeline header.

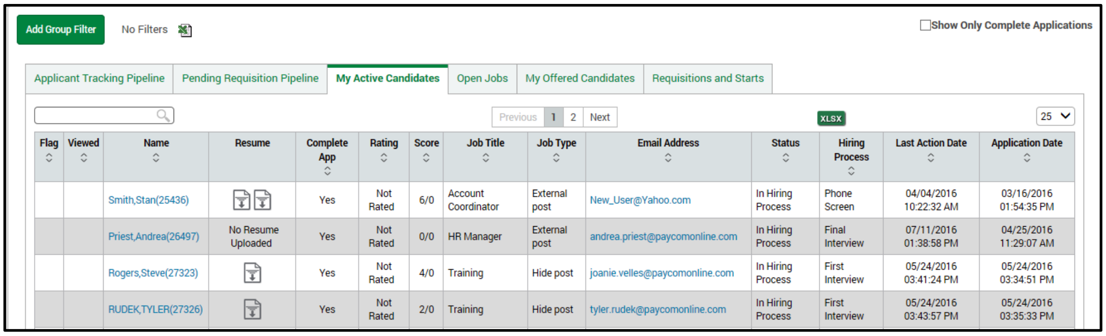


You can preview the applicants contained within a pipeline from the dashboard, allowing you to see new applicants within a specific step. The preview is accessed by hovering over the number below that step in the process. This also works when the pipelines are pinned.



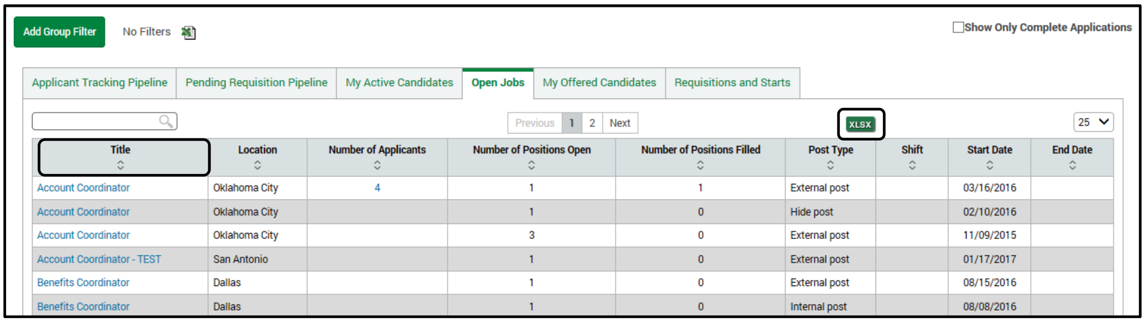
My Active Candidates

The "My Active Candidates" tab displays all of the candidates who are currently active in your system. Select their name to review their application or click on the link to their resume to preview their resume(s).



Open Jobs

The "Open Jobs" tab allows you to quickly review what open jobs you have. You can review or sort by the Job Title, Location, Number of Applicants, Number of Positions Open, and the Start Date. Clicking on the grey arrow below the field allows you to sort the options in the order that you prefer. If you want to export this information to Excel, simply click on the "XLSX" button.

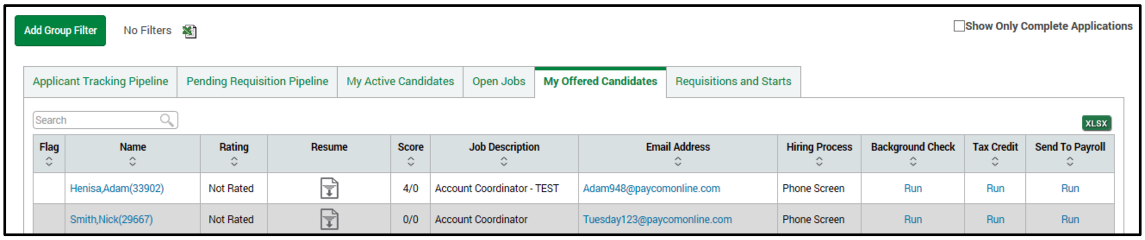


Title	Location	Number of Applicants	Number of Positions Open	Number of Positions Filled	Post Type	Shift	Start Date	End Date
Account Coordinator	Oklahoma City	4	1	1	External post		03/16/2016	
Account Coordinator	Oklahoma City		1	0	Hide post		02/10/2016	
Account Coordinator	Oklahoma City		3	0	External post		11/09/2015	
Account Coordinator - TEST	San Antonio		1	0	External post		01/17/2017	
Benefits Coordinator	Dallas		1	0	External post		08/15/2016	
Benefits Coordinator	Dallas		1	0	Internal post		08/08/2016	

My Offered Candidates

Within the "My Offered Candidates" tab, you're able to run a Background Check, Tax Credit or Send to Payroll. If you've given the candidate a score, it will appear in the "Score" column.

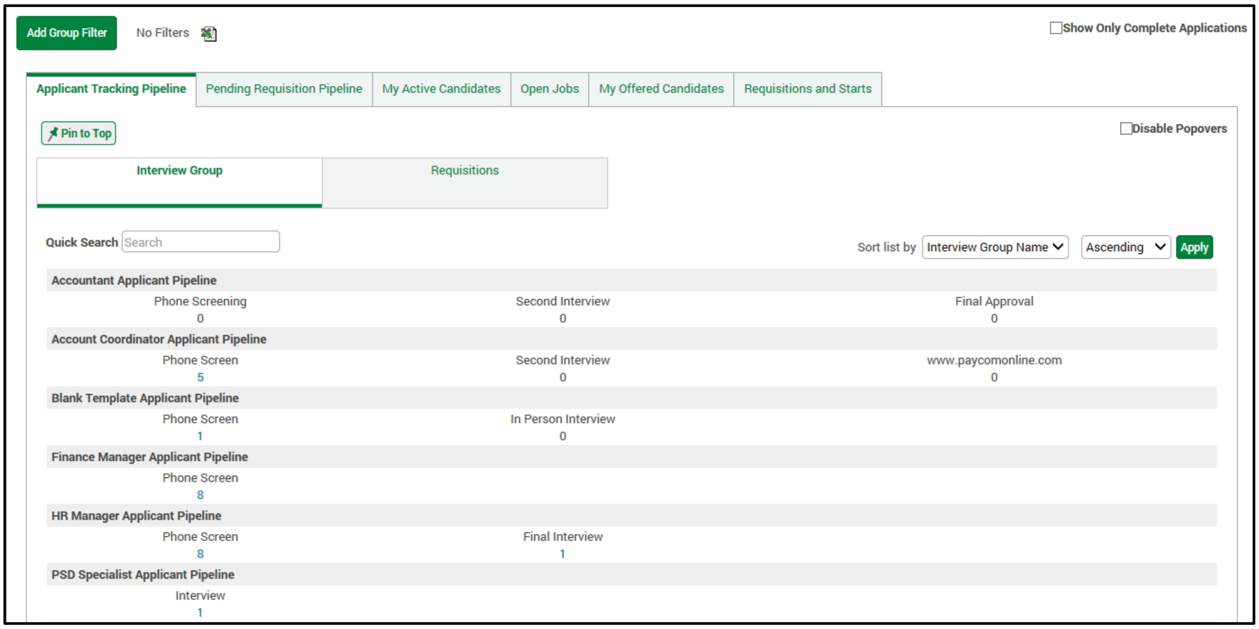
If you see "Converted" under the Background Check column and/or "Check" under the Tax Credit column, it means a background check and/or tax credit has previously been run on this candidate. If you are using Paycom's Pre-Employment feature you can change the status from "Applicant" to "Hired."



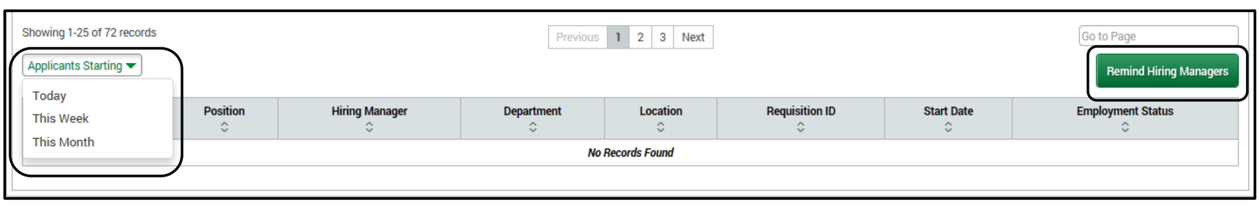
Flag	Name	Rating	Resume	Score	Job Description	Email Address	Hiring Process	Background Check	Tax Credit	Send To Payroll
	Henisa,Adam(33902)	Not Rated		4/0	Account Coordinator - TEST	Adam948@paycomonline.com	Phone Screen	Run	Run	Run
	Smith,Nick(29667)	Not Rated		0/0	Account Coordinator	Tuesday123@paycomonline.com	Phone Screen	Run	Run	Run

Requisitions and Starts

Lastly, the "Requisitions and Starts" tab displays a list of requisitions, pending offers and the number of employees starting through the end of the month. You have the ability to send reminders when new employees are starting and view current and future hiring needs, giving you more insight into the current recruiting metrics that interest you.

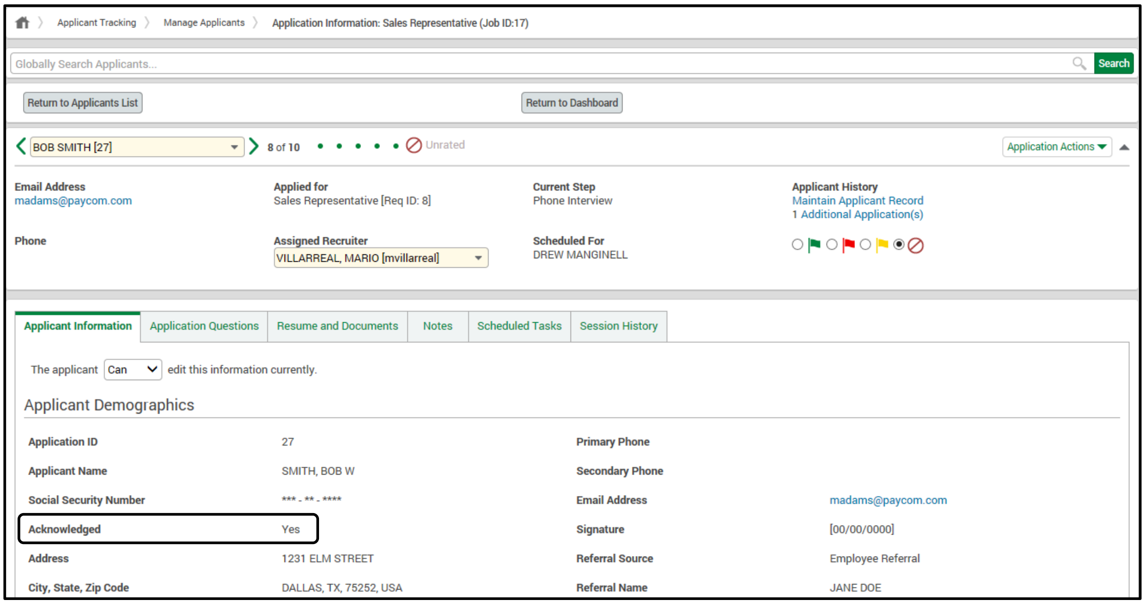


To send a reminder to a hiring manager regarding applicants, scroll to the bottom of the page and select the applicable response from "Applicants Starting." Select the desired applicants and click "Remind Hiring Managers."

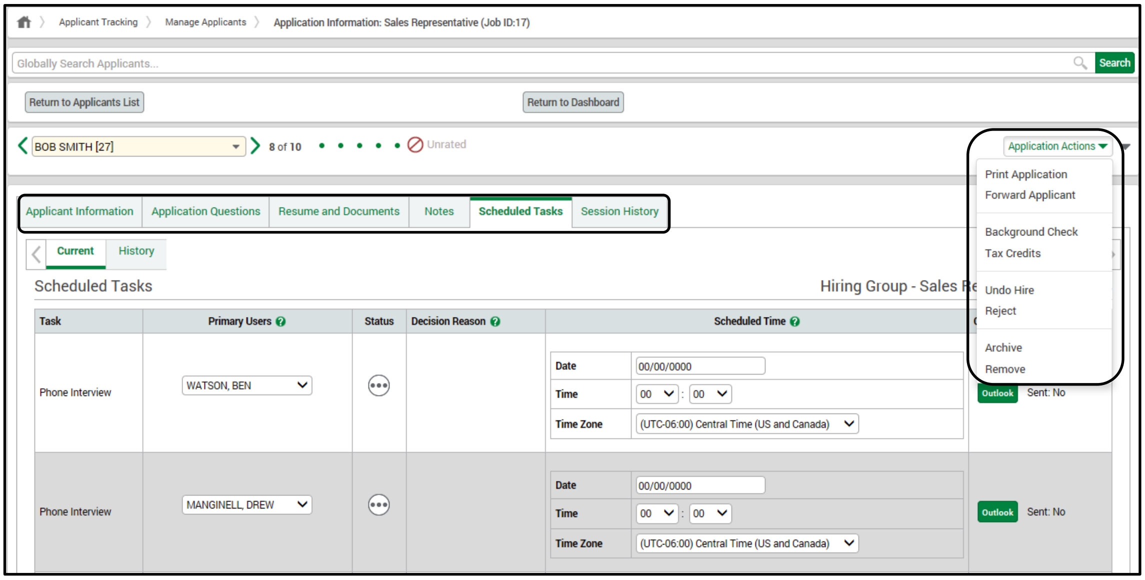


Application Information

Within the application, you'll be able to view applicant information, education, work history, answers to questions, make notes, transfer applicants, run a background check or tax credit, approve/deny a status, schedule a task and/or take action on an application. If the application is 100 percent complete, the Acknowledged field answer will be "Yes." If the application has not been acknowledged by the applicant, the field will read "No."



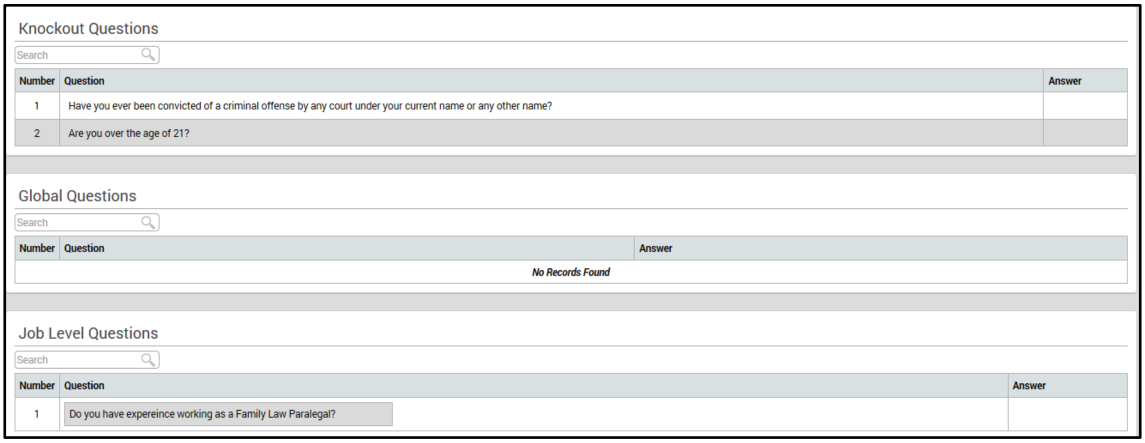
Utilize the Application Actions drop-down to review any actions you might need to take on an applicant. Also, navigate between the easy-to-use tabs of applicant information including Applicant Informaiton, Application Questions, Resume and Documents, Notes, Scheduled Tasks and Session History.



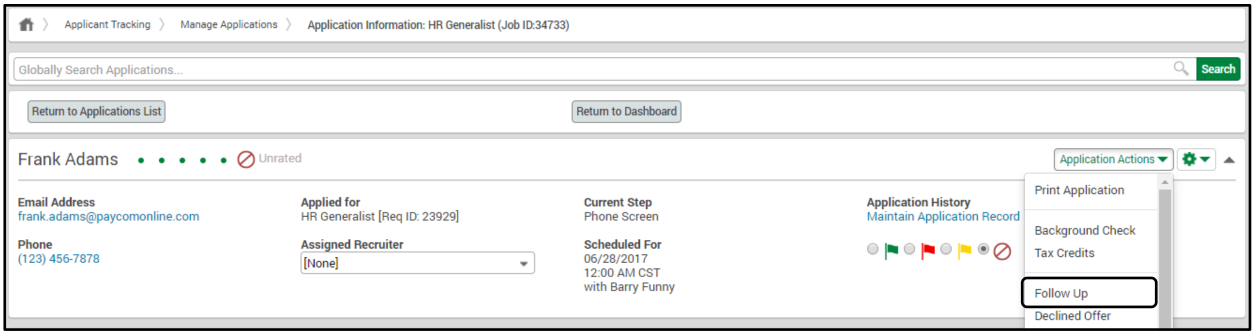
Give your dedicated Paycom Specialist a call to enable the enhanced applicant view!

Questions/Answers

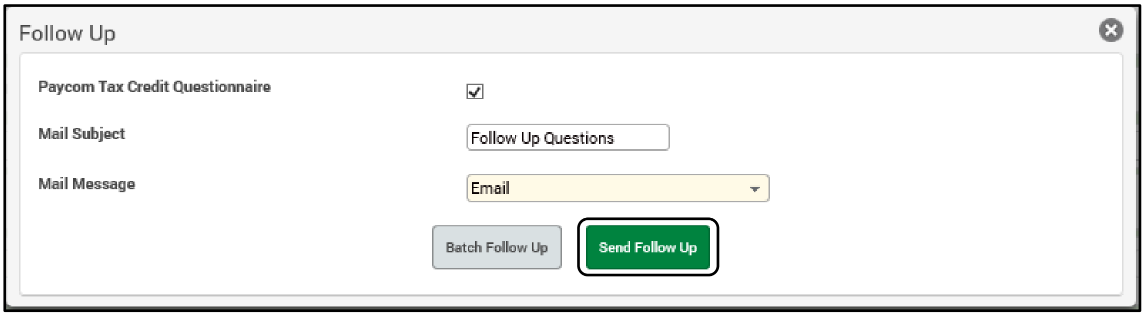
The next section shows the previously setup application questions and the applicant's answers.



For Follow-Up Questions, when an applicant applies for the position, there is a section on the application to unlock the follow-up questions for them if he or she has moved forward in the interview process. Select “Follow Up” within the Application Actions drop-down.

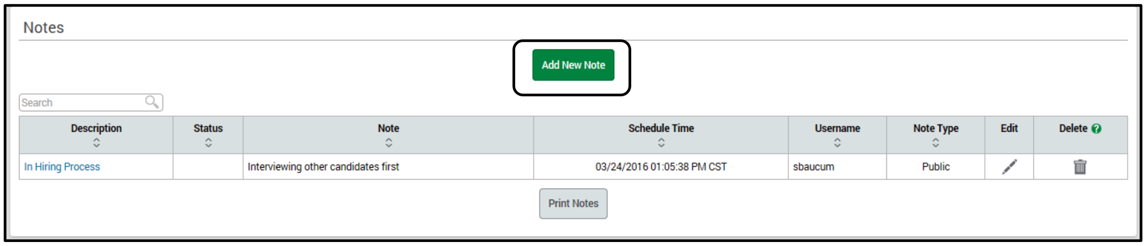


Select the group you want to assign and then select “Send Follow Up.” This can be done in a batch operation as well by selecting “Batch Follow Up.” You can also select to notify your applicant via email to inform them they have follow-up questions to answer. In the Mail Message drop-down, be sure “Email” is selected. This is important as it lets the applicant know you are waiting for additional information.



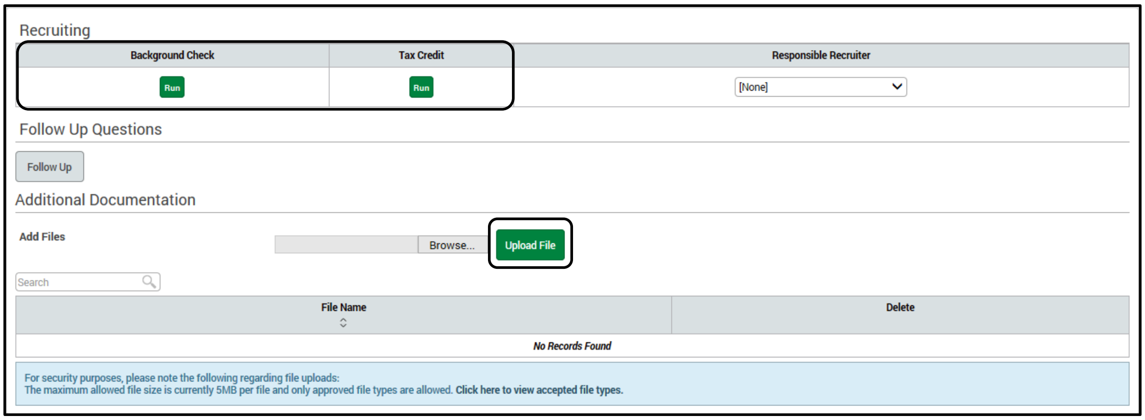
File Uploads/Notes

To view and/or save the applicant’s résumé or any other uploaded file, select the file’s hyperlink. To add a Public or Private Note about the applicant, select “Add New Note.” You also have the option to Print Notes.



Recruiting

The next section allows you to transfer applicants, run background checks and tax credits, assign a recruiter and attach additional documentation. For example, you might want to upload thank you letters or interview questions. This allows you to keep all applicant information in one location.

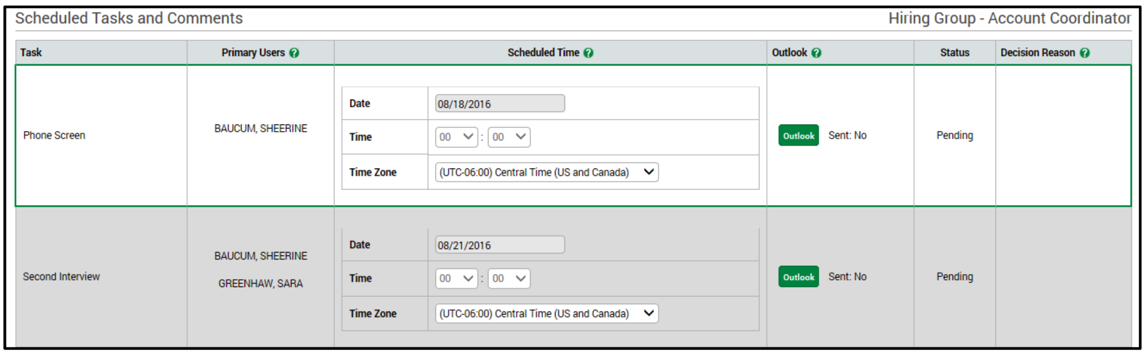


Scheduled Tasks and Comments/Application Hiring Process

Within the Scheduled Tasks and Comments section, you have the ability to schedule a task, approve or deny an applicant and provide a decision reason. When selecting your decision reason, you can add a note to explain it further. This is beneficial when explaining why a "Rejected" decision reason is used so other users do not have to search for the reason within the application notes.

Note: If an application is not active, this section will be read only. Users will only be able to edit active applications.

Use the Applicant Hiring Process drop-down to move the applicant in the process and select "Update Status" when you're done.



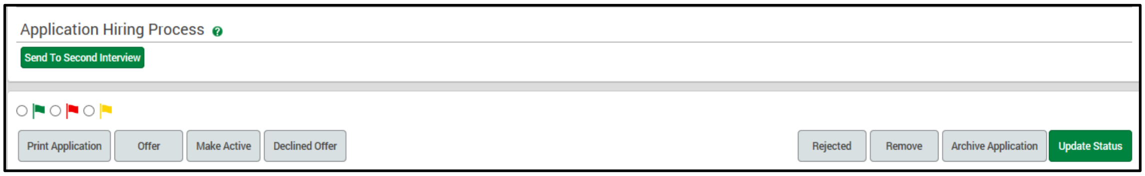
Scheduled Tasks and Comments — Hiring Group - Account Coordinator

Task	Primary Users	Scheduled Time	Outlook	Status	Decision Reason
Phone Screen	BAUCUM, SHEERINE	Date: 08/18/2016; Time: 00 : 00; Time Zone: (UTC-06:00) Central Time (US and Canada)	Outlook Sent: No	Pending	
Second Interview	BAUCUM, SHEERINE GREENHAW, SARA	Date: 08/21/2016; Time: 00 : 00; Time Zone: (UTC-06:00) Central Time (US and Canada)	Outlook Sent: No	Pending	

You have the option to select one of the following status action buttons at the bottom of the screen when updating your applicant:

- "Offer" will prompt an email correspondence to the applicant. This will move the applicant to "My Offered Candidate" on the Dashboard and prepare the applicant for background checks, tax credits and/or sending to payroll.
- "Save for Later" will prompt email correspondence to the applicant. This removes the applicant from the pipeline but the application will still be searchable in "Manage Applicants" and the applicant can reapply.
- "Declined Offer" is applied if the applicant has been given an offer and in turn, rejects that offer. This removes the applicant from "My Offered Candidates" on the Dashboard. The application will still be searchable under "Manage Applicants."
- "Rejected" will prompt email correspondence and a rejection letter to the applicant. This removes the applicant from the pipeline. The application will still be searchable under "Manage Applicants" but the applicant will not be able to update the application or reapply.

If you used the Applicant Hiring Process drop-down to move the applicant in the process, remember to select "Update Status."



If you chose to use one of the action buttons: "Offer," "Save for Later," "Declined Offer" or "Rejected," the next screen will prompt you to send an email notification. Enter a Mail Subject and select the type of message from the drop-down. Select "Email Letter" to send the email or "Skip This Step" to return to the Dashboard.

After any changes are made to the application, remember to click "Update Status."

If you need additional assistance, check out our Paycom University training courses or visit the other *Applicant Tracking* manuals on the Help Menu.