Managing My Applicants

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Managing My Applicants

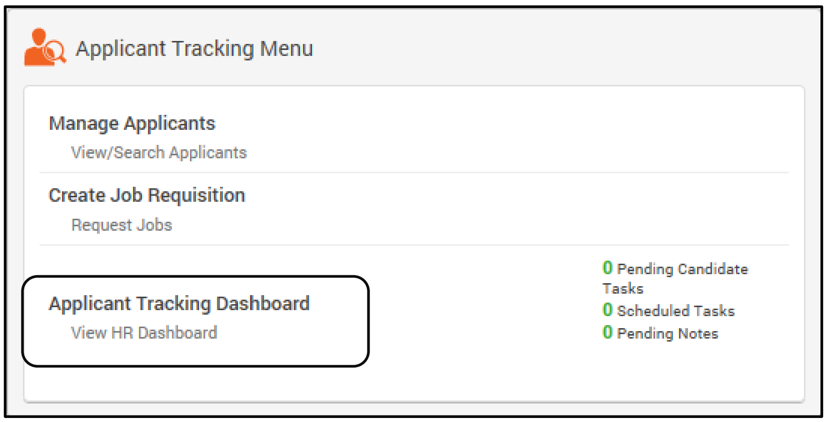
Effectively managing your applicants is a must when it comes to growing your company. With Paycom's Applicant Tracking feature, you can easily create a job post to attract the right talent. After an applicant has applied for a position, you can complete each step of the hiring process through the Applicant Tracking Dashboard. In this course, we'll discuss how you can:

- use the Applicant Tracking Dashboard (Page 3);
- manage applicants (Page 9); and
- adding tags to candidates (Page 14).

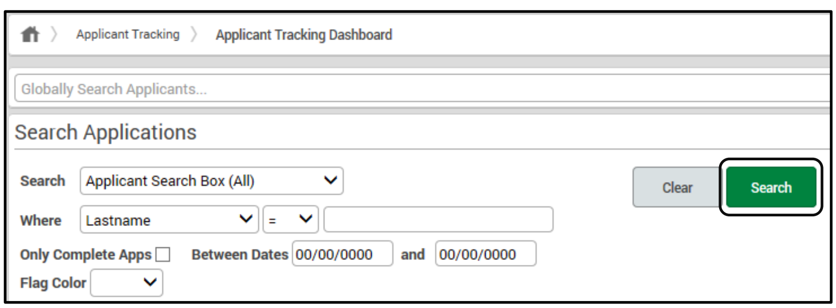
Using the Applicant Tracking Dashboard

Once an applicant has applied for a position, you can take action on the application through the Applicant Tracking Dashboard. Within the Dashboard, you can view applicants and change the status of their application, depending on your access.

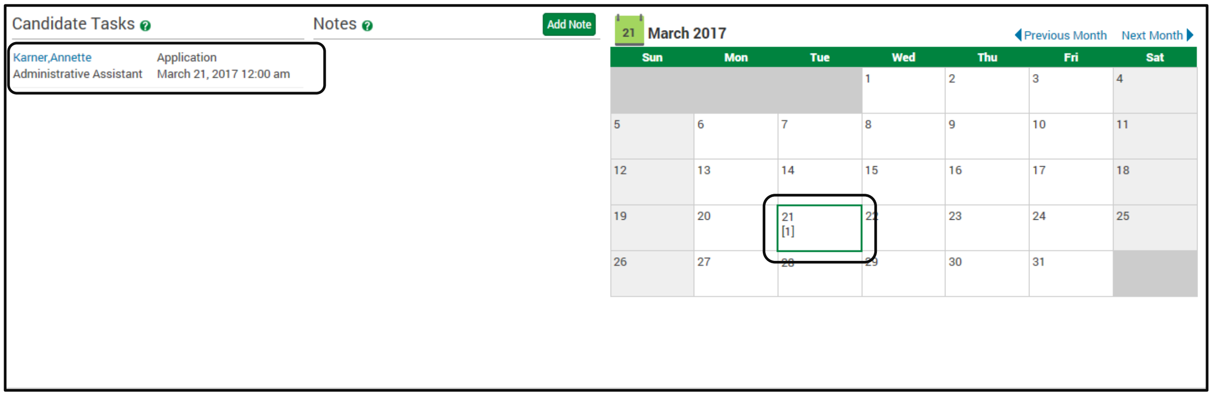
Select "Applicant Tracking Dashboard" from the Applicant Tracking Menu.



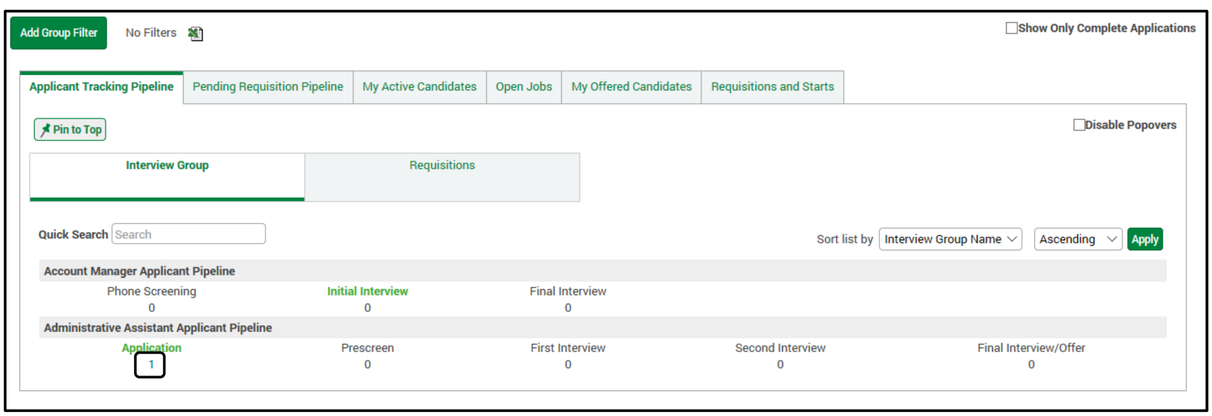
The top of the Dashboard stores filters that you can use to easily find applicants within the system. Simply select your choices from the drop-down menus and click "Search."



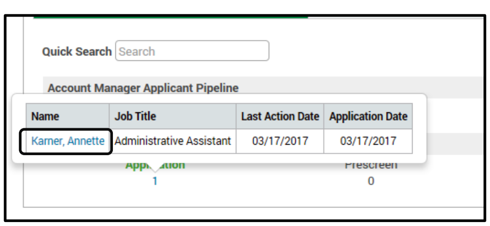
Below that, you'll see the calendar and any tasks you have scheduled to complete. By clicking on a calendar date, your tasks will display to the left.



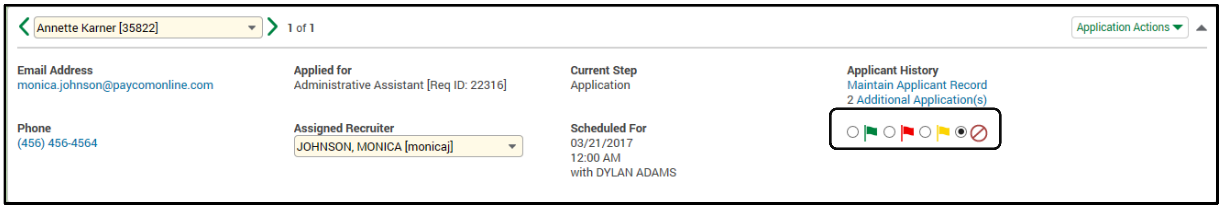
At the bottom, you'll find the applicant pipelines, which display each step of the hiring process. Here, you can see pending requisitions, active candidates, open jobs, offered candidates and additional requisition information. If you're looking to take action on an active application, you'll want to view the Applicant Tracking Pipeline tab. You can hover over the number to see who has applied for the position.



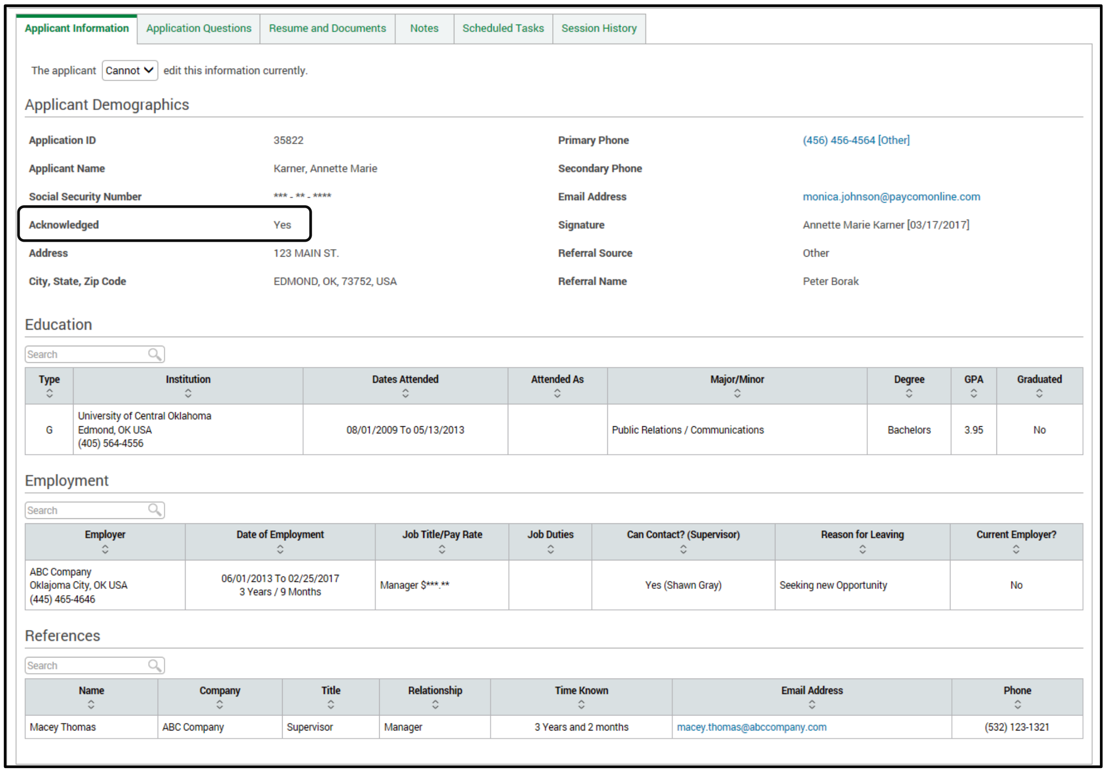
You can review their application by clicking on their name.



At the top of the page, you'll see the applicant's contact information, the position they applied for and applicant history. Notice the green, red and yellow flags? You can use them to convey your interest in the applicant to the next person in the hiring process.



Below that, you'll see the actual application, which is broken out into tabs. The first tab stores the applicant's basic information, such as their demographics, education and employment history. Something to pay attention to here is the Acknowledged field. "Yes" means that the applicant has completed the application.



Applicant Information | Application Questions | Resume and Documents | Notes | Scheduled Tasks | Session History

The applicant Cannot edit this information currently.

Applicant Demographics

Application ID	35822	Primary Phone	(456) 456-4564 [Other]
Applicant Name	Karner, Annette Marie	Secondary Phone	
Social Security Number	*** - ** - ****	Email Address	monica.johnson@paycomonline.com
Acknowledged	Yes	Signature	Annette Marie Karner [03/17/2017]
Address	123 MAIN ST.	Referral Source	Other
City, State, Zip Code	EDMOND, OK, 73752, USA	Referral Name	Peter Borak

Education

Search

Type	Institution	Dates Attended	Attended As	Major/Minor	Degree	GPA	Graduated
G	University of Central Oklahoma Edmond, OK USA (405) 564-4556	08/01/2009 To 05/13/2013		Public Relations / Communications	Bachelors	3.95	No

Employment

Search

Employer	Date of Employment	Job Title/Pay Rate	Job Duties	Can Contact? (Supervisor)	Reason for Leaving	Current Employer?
ABC Company Oklajoma City, OK USA (445) 465-4646	06/01/2013 To 02/25/2017 3 Years / 9 Months	Manager $***.**		Yes (Shawn Gray)	Seeking new Opportunity	No

References

Search

Name	Company	Title	Relationship	Time Known	Email Address	Phone
Macey Thomas	ABC Company	Supervisor	Manager	3 Years and 2 months	macey.thomas@abccompany.com	(532) 123-1321

In the Application Questions tab, you can review the applicant's answers to the questions you set up previously.

Applicant Information | **Application Questions** | Resume and Documents | Notes | Scheduled Tasks | Session History

Knockout Questions

03/17/2017 02:03:19 PM

Search

Number	Question	Answer
1	Have you ever been convicted of a felony?	No
2	Do you have a college degree?	Yes
3	Are you at least 18 years of age?	Yes
4	Do you have administrative experience?	Yes
5	Do you have a valid driver's license?	Yes

Global Questions

03/17/2017 02:03:25 PM

Search

Number	Question	Answer
1	Are you authorized to work in the United States?	Yes
2	Are you authorized to work full time?	Yes
3	If not, when are you available to work?	

Job Level Questions

03/17/2017 02:03:12 PM

Search

Number	Question	Answer
1	How many years of administrative assistance do you have?	5
2	How many words per minute can you type?	160
3	Can you manage multiple projects at once?	Yes
4	Have you planned an executive meeting before?	Yes

If the applicant included their resume or a cover letter when they submitted their application, you can access that next.

Applicant Information | Application Questions | **Resume and Documents** | Notes | Scheduled Tasks | Session History

Resume Uploads

No Resume Uploaded

Cover Letter Uploads

No Cover Letter Uploaded

File Uploads

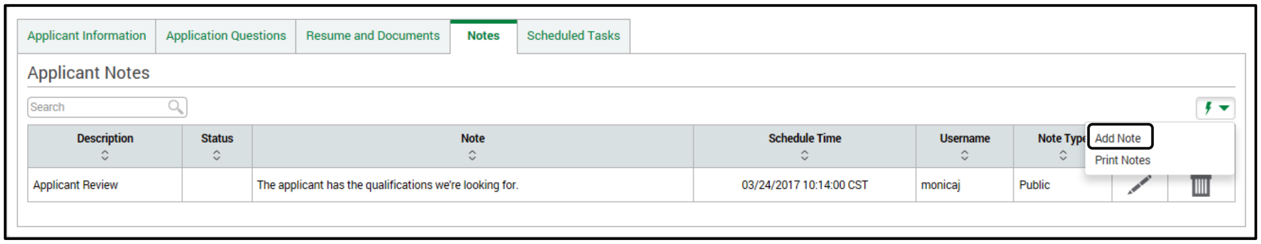
For security purposes, please note the following regarding file uploads:
The maximum allowed file size is currently 5MB per file and only approved file types are allowed. **Click here to view accepted file types.**

Browse... | Upload File

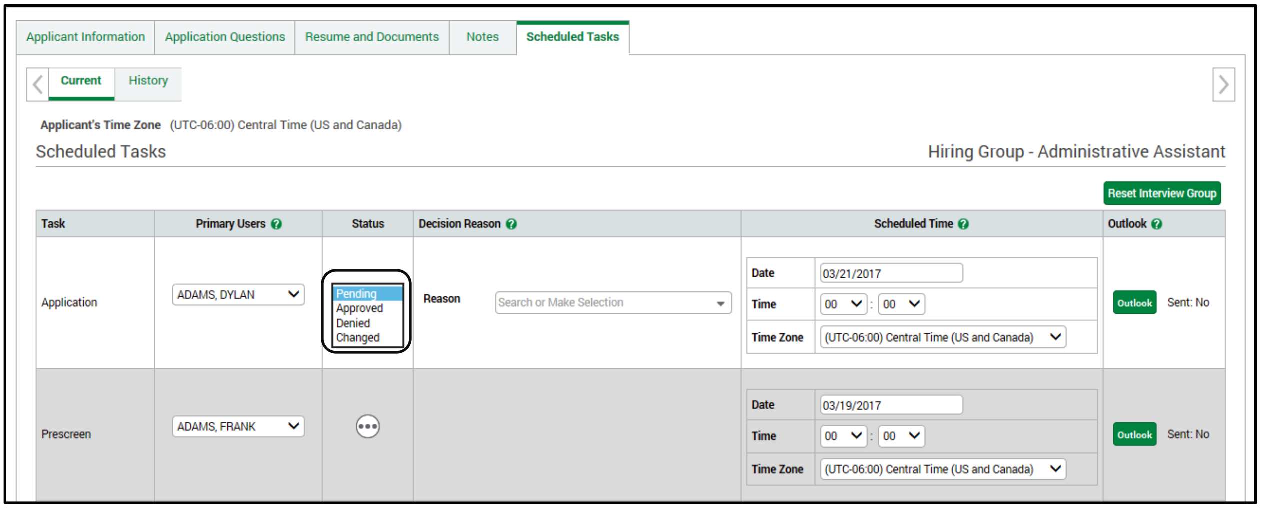
Search

File Name	Delete
No Records Found	

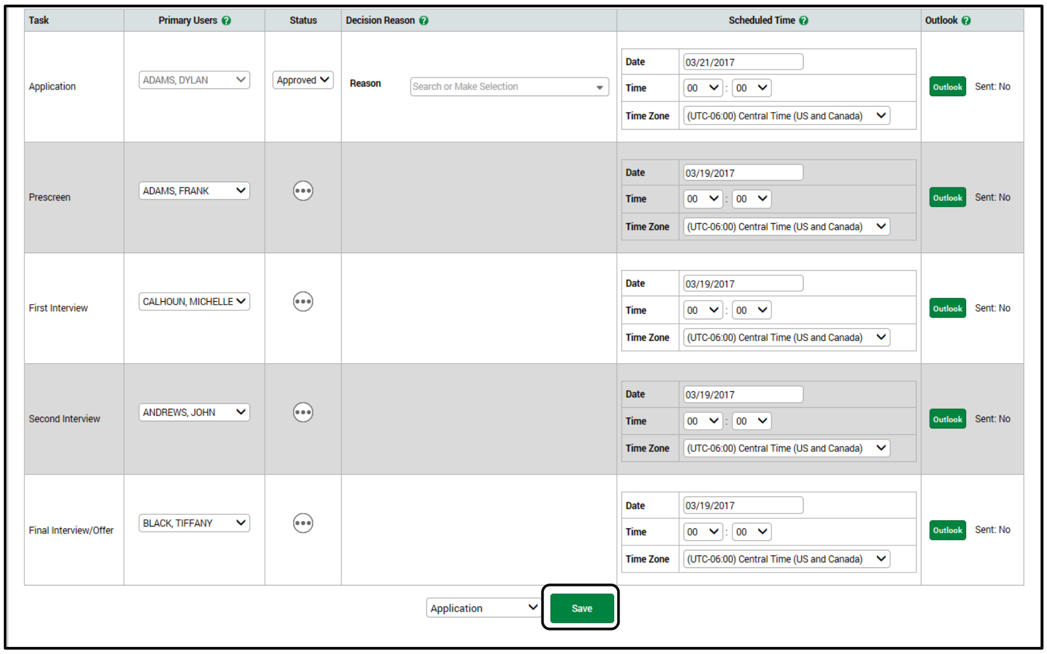
The Notes section allows you to jot down your thoughts on the applicant. You can add notes by clicking on the flash drop-down and selecting “Add Note.”



Finally, the Scheduled Tasks section displays who’s responsible for each step of the hiring process, as well as when they must complete their step. Use the Status drop-down to note your decision. You can even select a reason for your decision in case you want to provide the next person in the hiring process additional information about your decision.

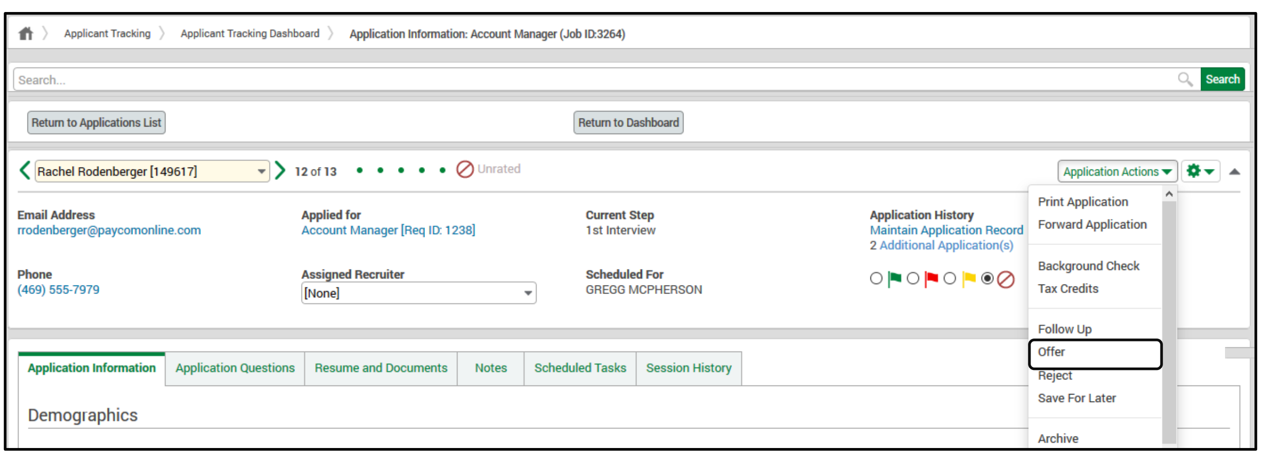


Once you've completed your part, be sure to save any changes by selecting "Save" at the bottom of the screen. Then, the next person in the hiring process can complete their step.

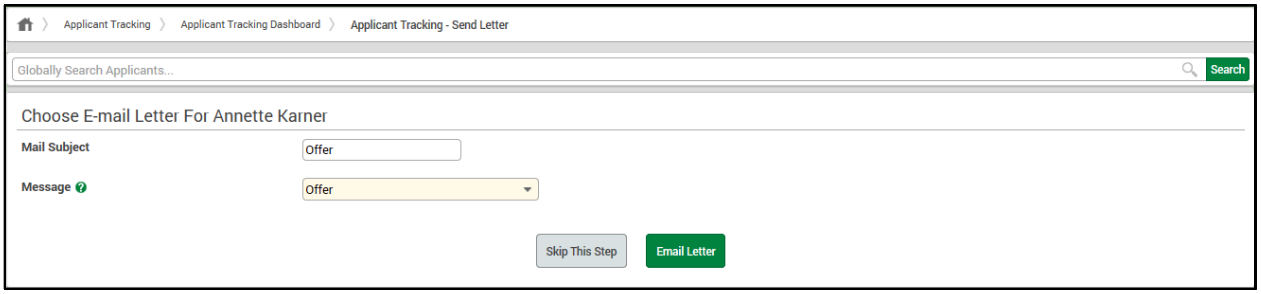


If you have access, you may be able to take certain actions, like offer the position, reject the applicant, save the application for later, transfer the applicant to another position and archive the application.

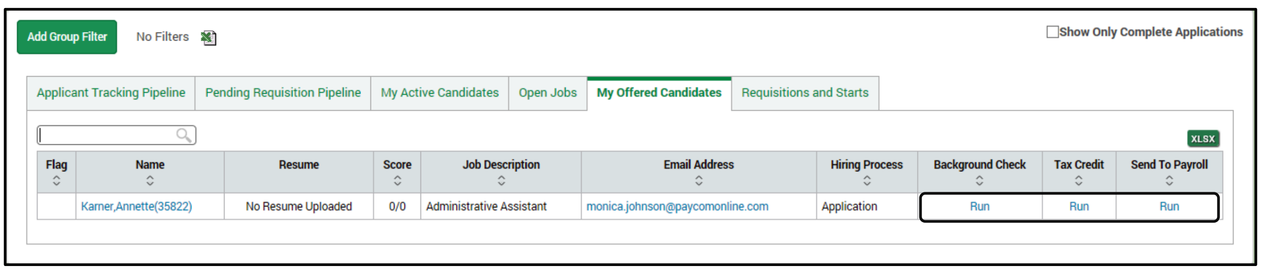
Just keep in mind some of these options allow you to send an email to the applicant and move the application to another pipeline. For example, to offer an applicant a position, select "Offer."



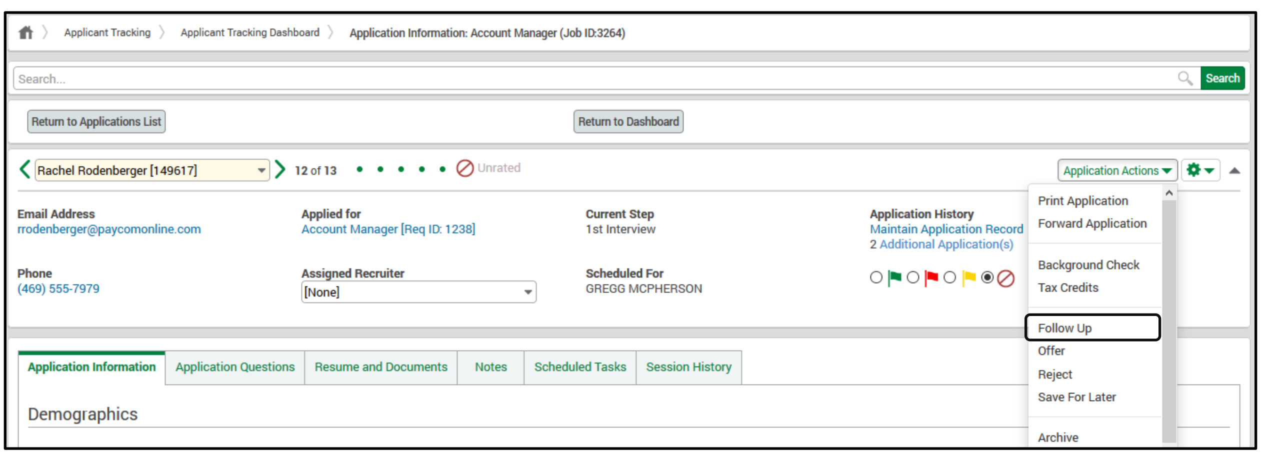
You can then send an email to the applicant, notifying him or her of your decision.



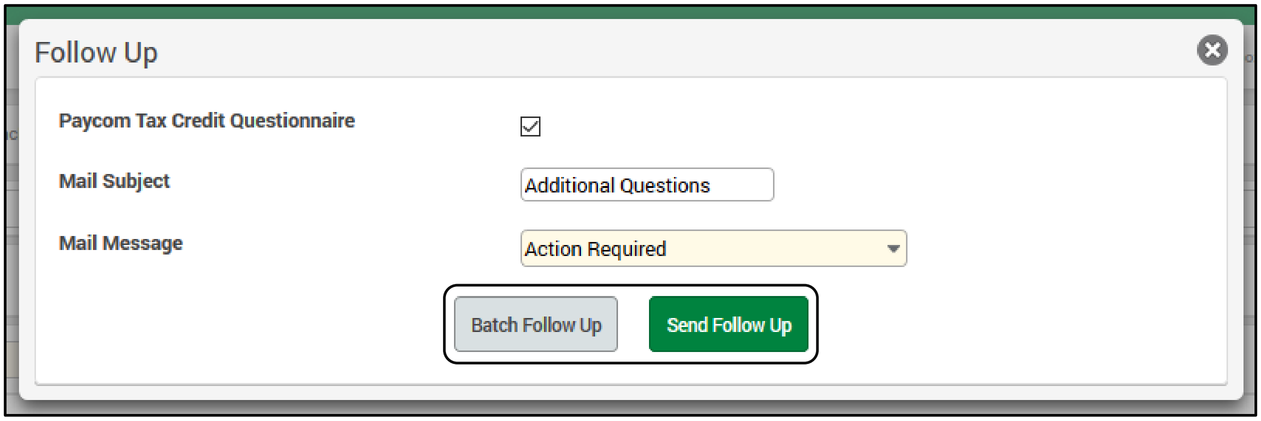
The applicant is then moved to the My Offered Candidate pipeline in the Dashboard. If the applicant accepts the offer, and you have the proper access level, you can complete the process by running a background check and processing available tax credits before sending the applicant to payroll.



If your applicant has additional questions they need to answer, select the option for "Follow Up" from the Application Actions drop-down.

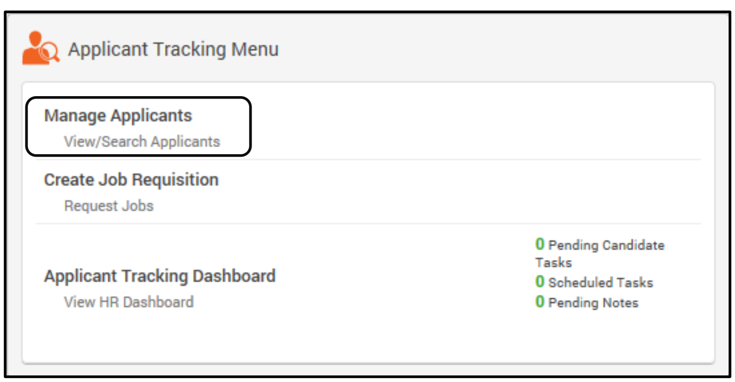


You can then send follow-up questions to your applicant. Click “Send Follow-Up” to send to one individual applicant or send the same questions to multiple applicants by using the batch option.



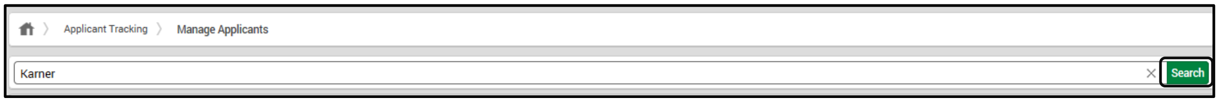
Managing Applicants

Easily accessing your applicants’ information is a must. So when it comes to managing your applicants, you have a couple of quick options. Let’s check out a couple of the most beneficial options within “Manage Applicants” in the Applicant Tracking Menu.

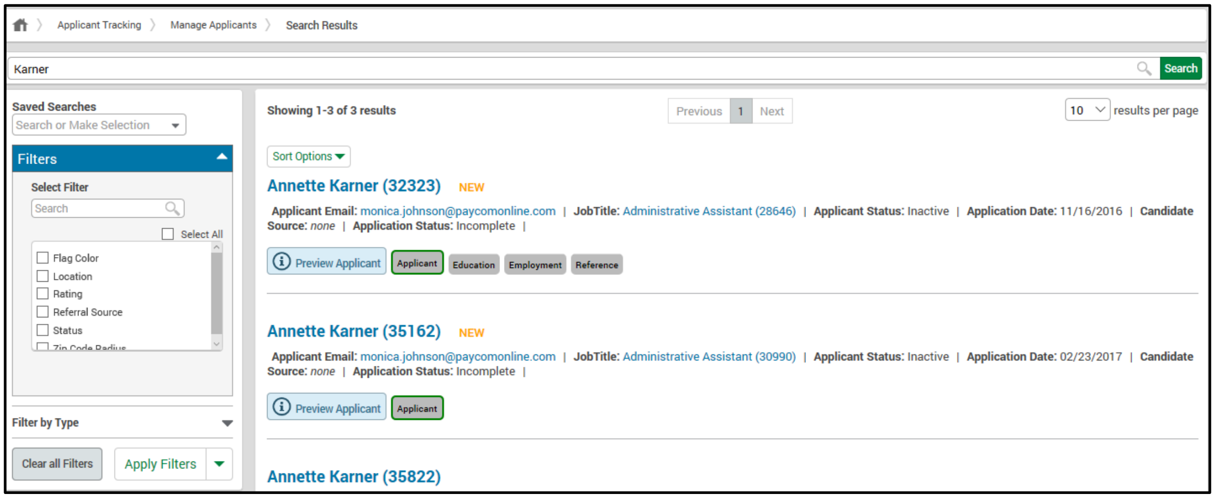


From here, you can add upload resumes and search for applicants. See the Search bar at the top of the screen? This is your best friend when it comes to managing applicants. You can type in virtually any information and the system will search through the entire application to find matches. Best of all, this search feature is available from any screen in the Applicant Tracking feature.

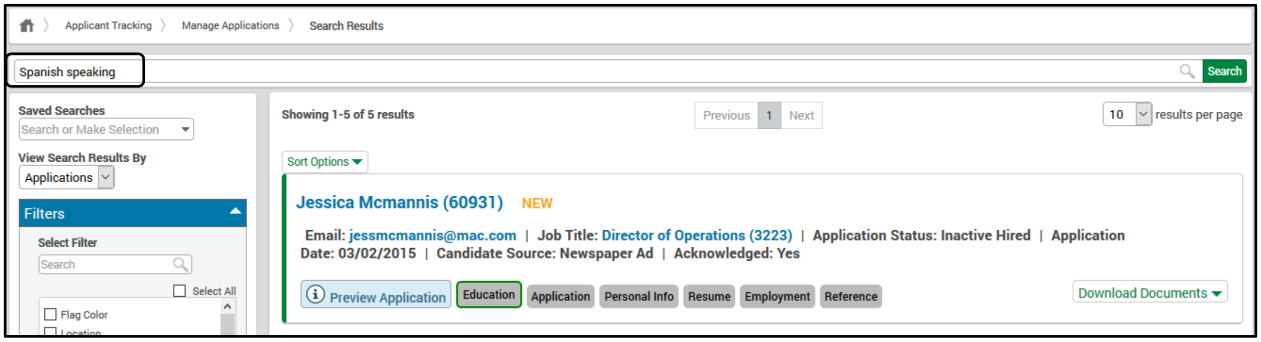
Once you've entered the information, click "Search."



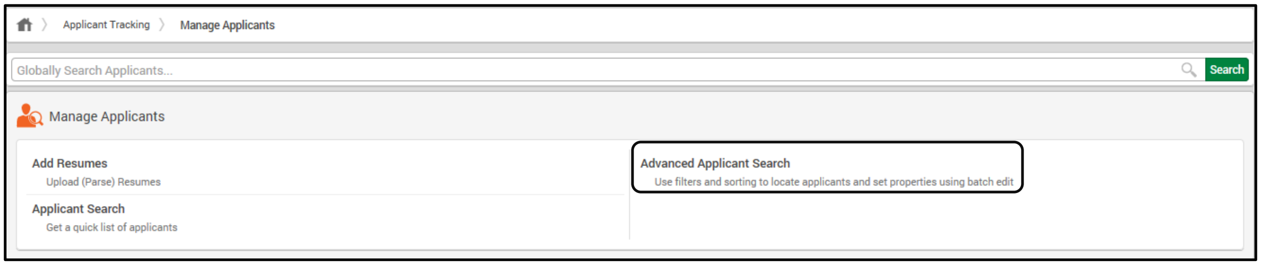
The system will then pull up a list of applications matching what you entered. If there are several options available, you can use the Filters on the left-hand side to narrow your scope even further.



You can also access candidate profile details by search key words such as "University of Oklahoma" or "Spanish speaking" to quickly narrow your search.

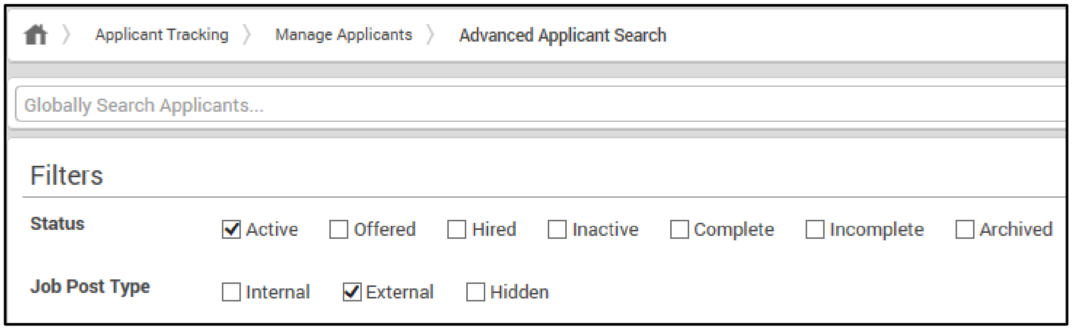


Another handy tool is the Advanced Applicant Search.

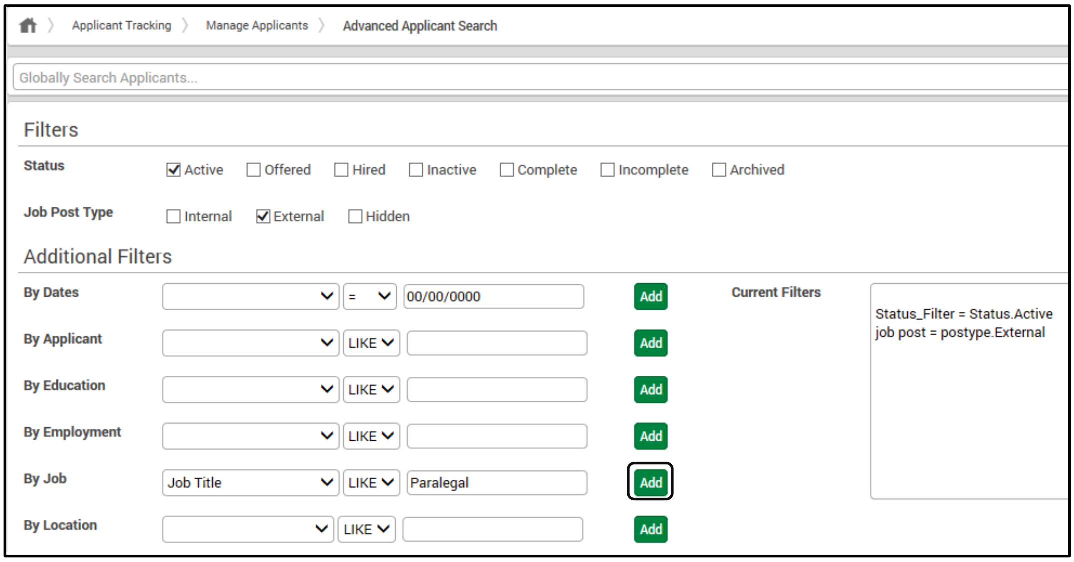


The Advanced Applicant Search allows you to find applications and resumes using a variety of filters. For example, you can narrow the scope of applications by status and job post type. You can even use our additional filters, such as name, dates and job, to refine the applicant list even further to find what you're looking for.

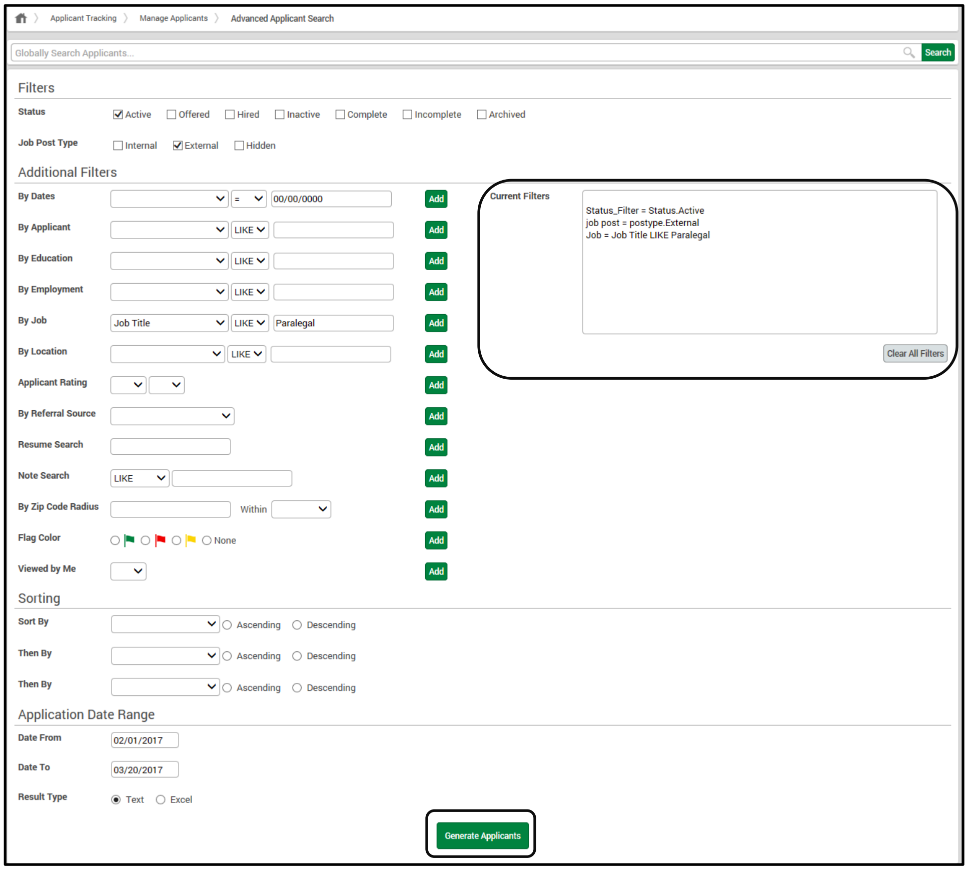
Let's take a look at how this works. In our example, let's filter the applicants to only include active candidates who have applied to externally posted jobs.



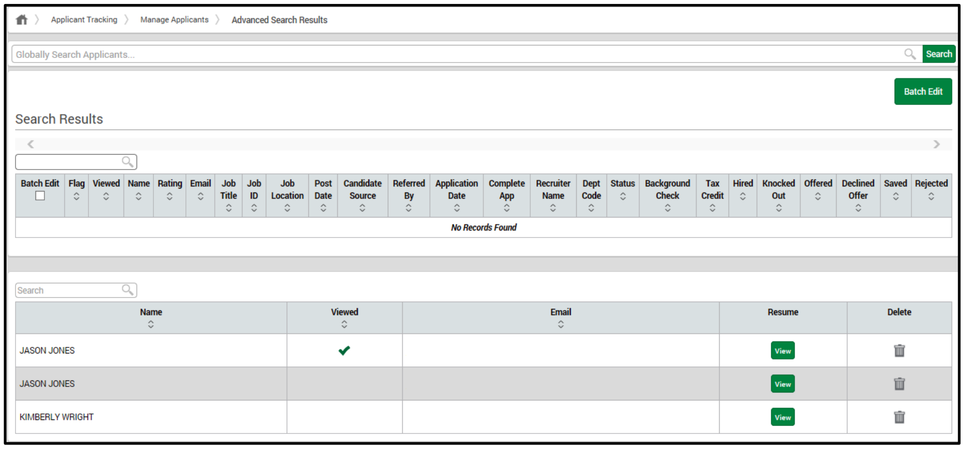
You can use the additional filters below to get even more specific. So if you want to search for applicants who have applied to specific jobs, you can. After making your selections from the category and comparison drop-downs, enter what you're searching for in the text field. Then, click "Add."



All of the filters you are using will display in the Current Filters section. When you're done, click "Generate Applicants."

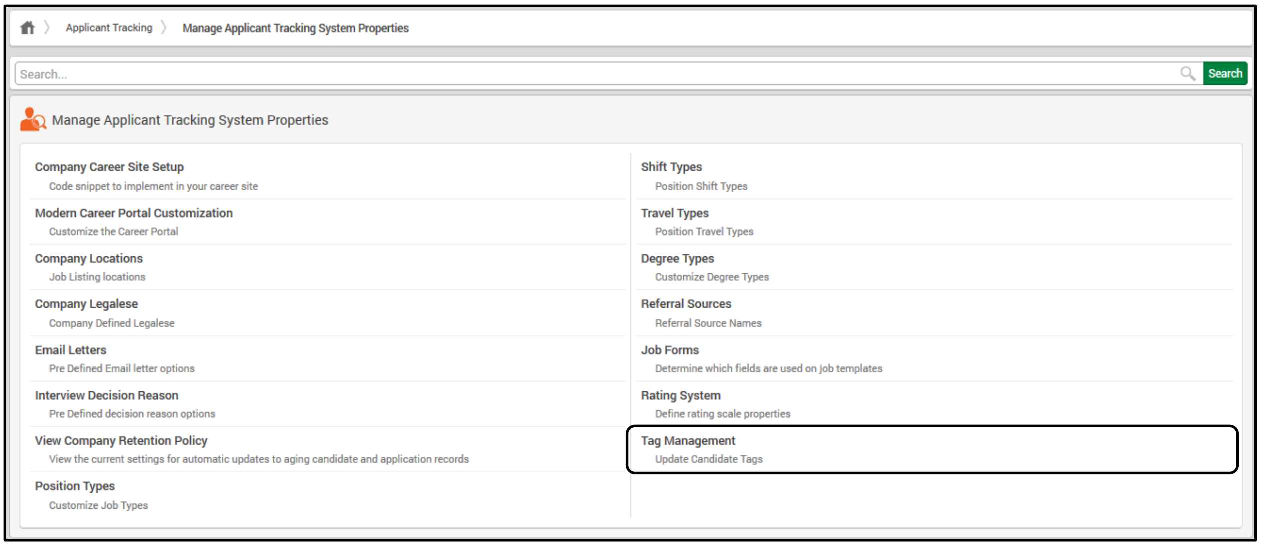


You'll then be able to view any applicants matching that criteria.

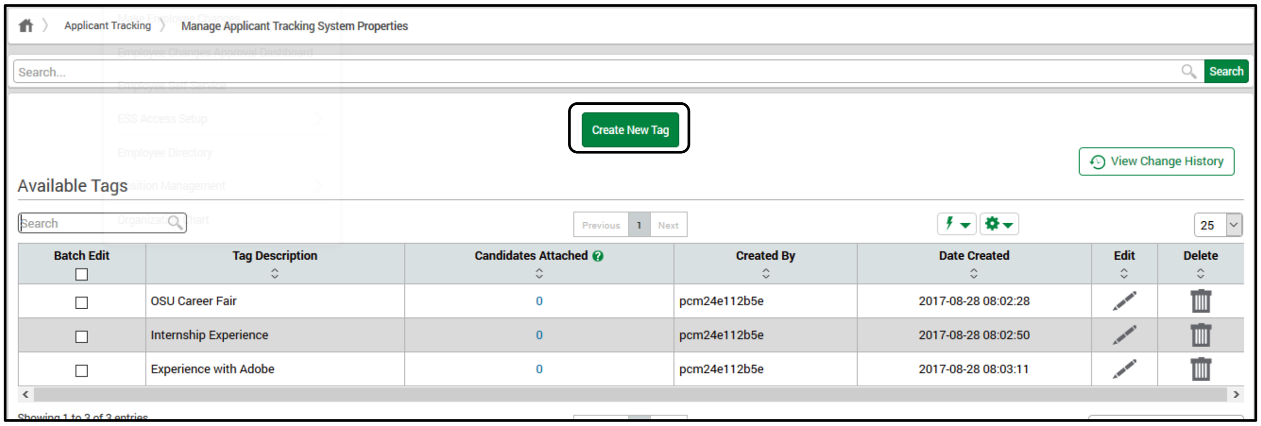


Adding Tags to Candidates

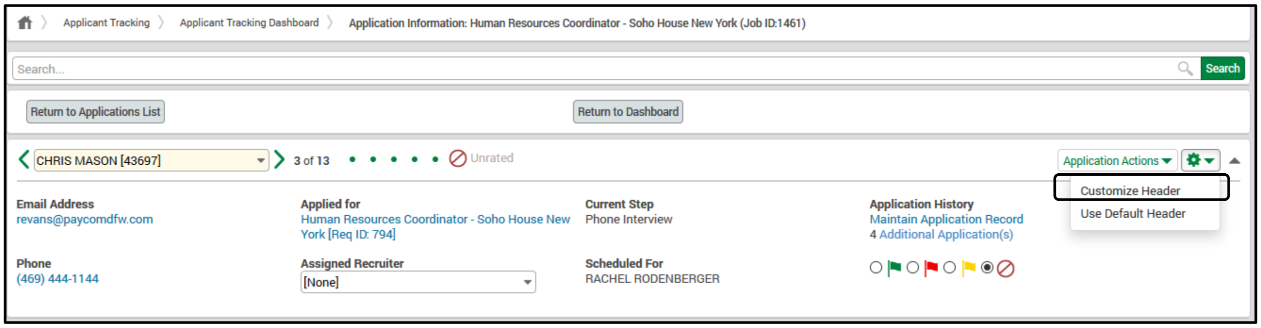
Group candidates together by skill set or even the location you met them using candidate tagging. You may create a tag for a specific networking event or another for a special skillset, such as being bilingual. To create tags, go to the Manage Applicant Tracking System Properties menu and click "Tag Management."



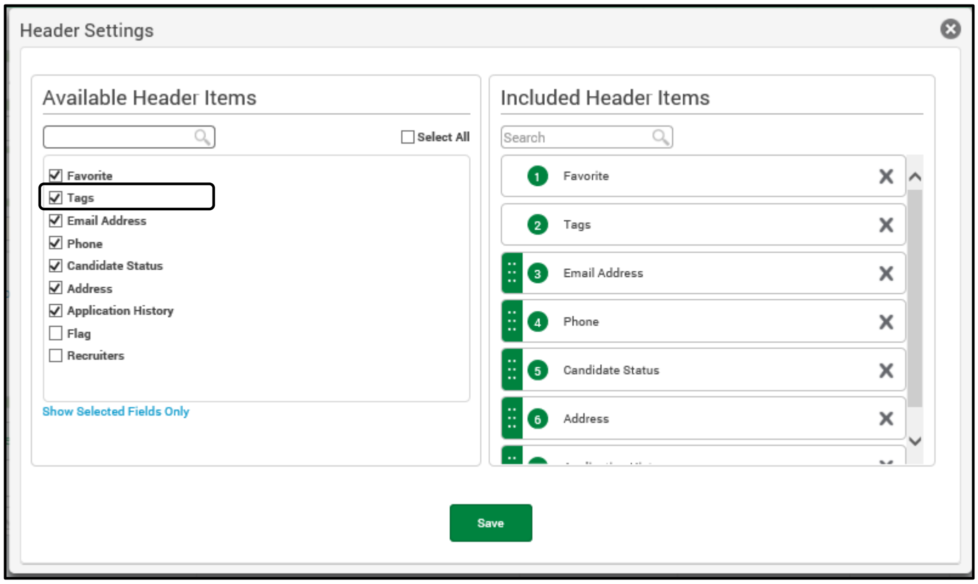
Click "Create New Tag" to begin adding tags. All your existing tags will display in a table format where you can edit and delete them as needed. After setting up your tags here, you can tie them to your applicants and review them within the individual's profile.



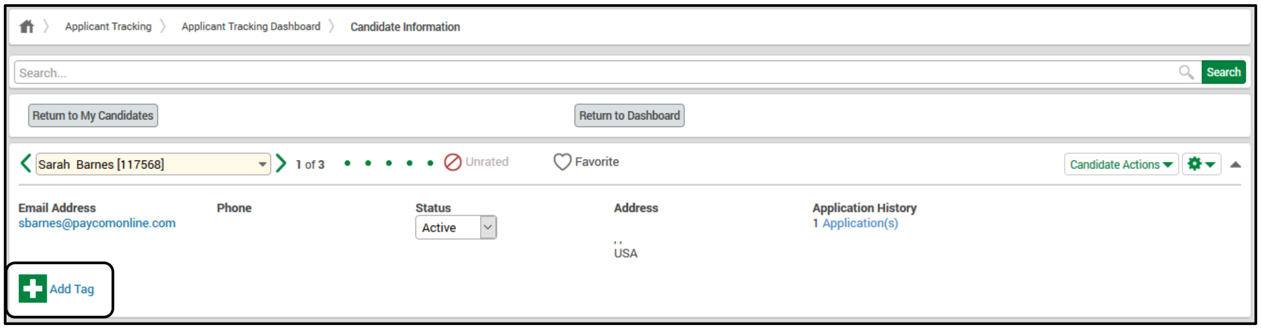
After you've created your tags, you will need to change the way you view candidate information by modifying your header settings. To do this, select any candidate and use the gear drop-down and click "Customize Header."



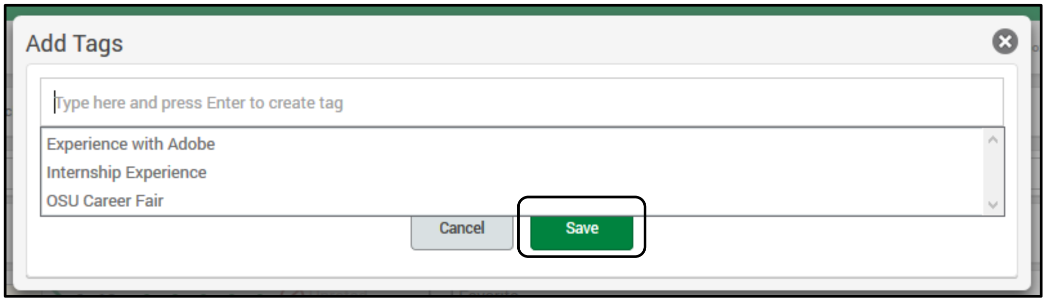
From here, click the box for "Tags." Now that you've enabled the option to view tags in candidate profiles, you'll begin tying tags to your candidates.



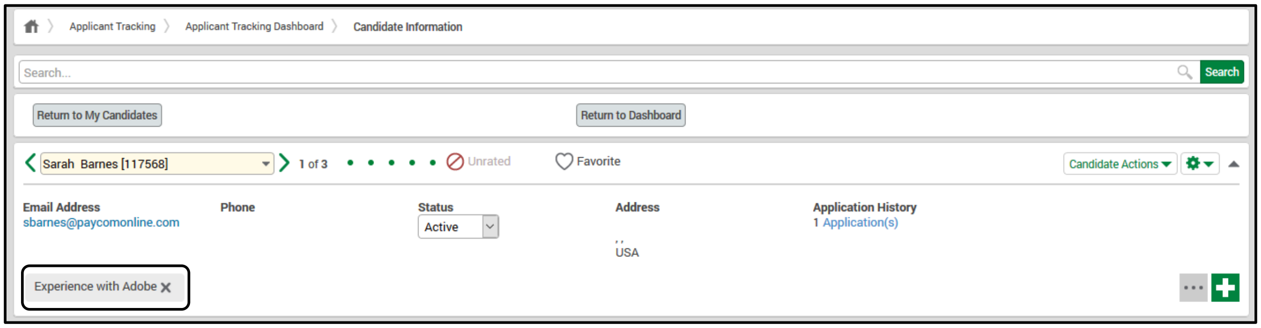
First, select the candidate for whom you'd like to add a tag. To add a tag, click the green plus sign.



Then, you can enter a new tag or select from an existing one and click "Save."



Your tags will display in the candidate's profile.



User permissions for tag management can be provided in your Permission Profiles.

In Conclusion

Now you know how to use the Applicant Tracking Dashboard and manage your applicants to meet your company's needs. Be sure to complete your certification by watching the training videos and answering a few quiz questions.