

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:

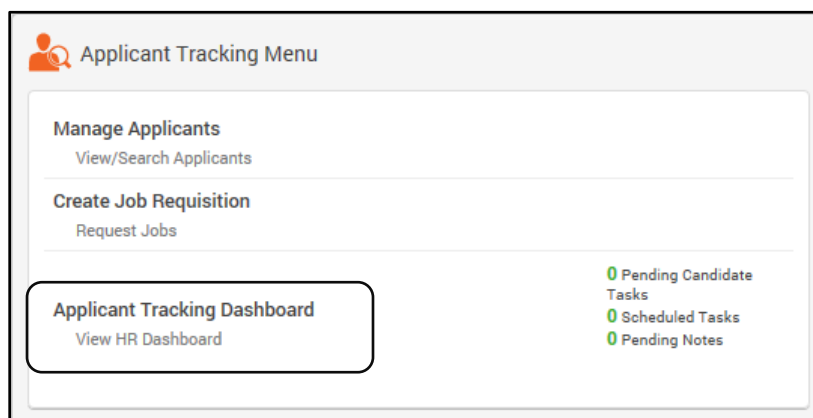
- use the Applicant Tracking Dashboard (Page 3);
- manage applicants (Page 9); and
- adding tags to candidates (Page 14).



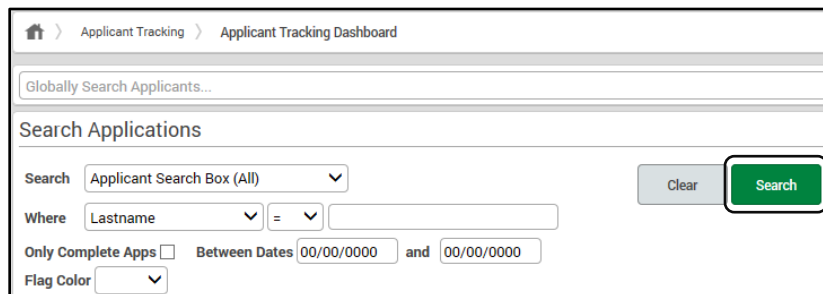
Using the Applicant Tracking Dashboard

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.

Candidate Tasks

Notes

Add Note

Kamer, Annette
Administrative Assistant
Application
March 21, 2017 12:00 am

21 March 2017

Previous Month

Next Month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21 [1]	22	23	24	25
26	27	28	29	30	31	

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.

Add Group Filter

No Filters

Show Only Complete Applications

Applicant Tracking Pipeline

Pending Requisition Pipeline

My Active Candidates

Open Jobs

My Offered Candidates

Requisitions and Starts

Pin to Top

Disable Popovers

Interview Group

Requisitions

Quick Search

Sort list by

Interview Group Name

Ascending

Apply

Account Manager Applicant Pipeline

Phone Screening

Initial Interview

Final Interview

Administrative Assistant Applicant Pipeline

Application

Prescreen

First Interview

Second Interview

Final Interview/Offer

You can review their application by clicking on their name.

Quick Search

Account Manager Applicant Pipeline

Name	Job Title	Last Action Date	Application Date
Kamer, Annette	Administrative Assistant	03/17/2017	03/17/2017



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.

< [Annette Karner [35822]] > 1 of 1

Application Actions

Email Address
monica.johnson@paycomonline.com

Applied for
Administrative Assistant [Req ID: 22316]

Current Step
Application

Applicant History
Maintain Applicant Record
2 Additional Application(s)

Phone
(456) 456-4564

Assigned Recruiter
JOHNSON, MONICA [monicaj]

Scheduled For
03/21/2017
12:00 AM
with DYLAN ADAMS

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 Oklahoma 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	

6



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.”

The screenshot shows the 'Notes' tab selected in the top navigation bar. Below the tabs is a search bar and a table of notes. The table has columns for Description, Status, Note, Schedule Time, Username, and Note Type. A dropdown menu is open over the 'Add Note' button, showing options like 'Add Note' and 'Print Notes'.

Description	Status	Note	Schedule Time	Username	Note Type
Applicant Review		The applicant has the qualifications we're looking for.	03/24/2017 10:14:00 CST	monicaj	Public

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.

The screenshot shows the 'Scheduled Tasks' tab selected in the top navigation bar. Below the tabs is a navigation bar with 'Current' and 'History' buttons. The main content area shows a table of tasks with columns for Task, Primary Users, Status, Decision Reason, Scheduled Time, and Outlook. A dropdown menu is open over the 'Status' column for the 'Application' task, showing options like 'Pending', 'Approved', 'Denied', and 'Changed'.

Task	Primary Users	Status	Decision Reason	Scheduled Time	Outlook
Application	ADAMS, DYLAN	Pending	Reason	Date: 03/21/2017 Time: 00:00 Time Zone: (UTC-06:00) Central Time (US and Canada)	Outlook Sent: No
Prescreen	ADAMS, FRANK	...		Date: 03/19/2017 Time: 00:00 Time Zone: (UTC-06:00) Central Time (US and Canada)	Outlook Sent: No



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.

Task	Primary Users	Status	Decision Reason	Scheduled Time	Outlook
Application	ADAMS, DYLAN	Approved	Reason: Search or Make Selection	Date: 03/21/2017 Time: 00:00 Time Zone: (UTC-06:00) Central Time (US and Canada)	Outlook Sent: No
Prescreen	ADAMS, FRANK	...		Date: 03/19/2017 Time: 00:00 Time Zone: (UTC-06:00) Central Time (US and Canada)	Outlook Sent: No
First Interview	CALHOUN, MICHELLE	...		Date: 03/19/2017 Time: 00:00 Time Zone: (UTC-06:00) Central Time (US and Canada)	Outlook Sent: No
Second Interview	ANDREWS, JOHN	...		Date: 03/19/2017 Time: 00:00 Time Zone: (UTC-06:00) Central Time (US and Canada)	Outlook Sent: No
Final Interview/Offer	BLACK, TIFFANY	...		Date: 03/19/2017 Time: 00:00 Time Zone: (UTC-06:00) Central Time (US and Canada)	Outlook Sent: No

Application Save

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."

Home > Applicant Tracking > Applicant Tracking Dashboard > Application Information: Account Manager (Job ID:3264)

Search

Return to Applications List Return to Dashboard

< Rachel Rodenberger [149617] > 12 of 13 Unrated

Email Address
 rodenberger@paycomonline.com

Applied for
 Account Manager [Req ID: 1238]

Current Step
 1st Interview

Application History
 Maintain Application Record
 2 Additional Application(s)

Phone
 (469) 555-7979

Assigned Recruiter
 [None]

Scheduled For
 GREGG MCPHERSON

Application Information

Application Questions

Resume and Documents

Notes

Scheduled Tasks

Session History

Demographics

Application Actions

Print Application
 Forward Application
 Background Check
 Tax Credits
 Follow Up
Offer
 Reject
 Save For Later
 Archive



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

Applicant Tracking > Applicant Tracking Dashboard > Applicant Tracking - Send Letter

Globally Search Applicants... Search

Choose E-mail Letter For Annette Karner

Mail Subject: Offer

Message: Offer

Skip This Step Email Letter

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.

Add Group Filter No Filters Show Only Complete Applications

Applicant Tracking Pipeline Pending Requisition Pipeline My Active Candidates Open Jobs My Offered Candidates Requisitions and Starts

Flag	Name	Resume	Score	Job Description	Email Address	Hiring Process	Background Check	Tax Credit	Send To Payroll
	Karner,Annette(35822)	No Resume Uploaded	0/0	Administrative Assistant	monica.johnson@paycomonline.com	Application	Run	Run	Run

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

Applicant Tracking > Applicant Tracking Dashboard > Application Information: Account Manager (Job ID:3264)

Search... Search

Return to Applications List Return to Dashboard

Rachel Rodenberger [149617] 12 of 13 Unrated

Email Address: rodenberger@paycomonline.com Applied for: Account Manager [Req ID: 1238] Current Step: 1st Interview Application History: Maintain Application Record 2 Additional Application(s)

Phone: (469) 555-7979 Assigned Recruiter: [None] Scheduled For: GREGG MCPHERSON

Application Actions: Print Application, Forward Application, Background Check, Tax Credits, Follow Up, Offer, Reject, Save For Later, Archive

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

Demographics



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.

Follow Up

Paycom Tax Credit Questionnaire ☒

Mail Subject

Mail Message

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.

Applicant Tracking Menu

Manage Applicants
View/Search Applicants

Create Job Requisition
Request Jobs

Applicant Tracking Dashboard
View HR Dashboard

0 Pending Candidate Tasks
0 Scheduled Tasks
0 Pending Notes

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.

Home > Applicant Tracking > Manage Applicants

Globally Search Applicants... Search

Manage Applicants

- Add Resumes**
Upload (Parse) Resumes
- Applicant Search**
Get a quick list of applicants

Advanced Applicant Search
Use filters and sorting to locate applicants and set properties using batch edit

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.

Home > Applicant Tracking > Manage Applicants > Advanced Applicant Search

Globally Search Applicants...

Filters

Status ☒ Active ☐ Offered ☐ Hired ☐ Inactive ☐ Complete ☐ Incomplete ☐ Archived

Job Post Type ☐ Internal ☒ External ☐ Hidden



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."

[Home](#) > [Applicant Tracking](#) > [Manage Applicants](#) > [Advanced Applicant Search](#)

Globally Search Applicants...

Filters

Status ☒ Active ☐ Offered ☐ Hired ☐ Inactive ☐ Complete ☐ Incomplete ☐ Archived

Job Post Type ☐ Internal ☒ External ☐ Hidden

Additional Filters

By Dates = 00/00/0000

Add

By Applicant LIKE

Add

By Education LIKE

Add

By Employment LIKE

Add

By Job

Job Title

 LIKE

Paralegal

Add

By Location LIKE

Add

Current Filters

Status_Filter = Status.Active
job post = posttype.External



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

Applicant Tracking > Manage Applicants > Advanced Applicant Search

Globally Search Applicants... Search

Filters

Status ☒ Active ☐ Offered ☐ Hired ☐ Inactive ☐ Complete ☐ Incomplete ☐ Archived

Job Post Type ☐ Internal ☒ External ☐ Hidden

Additional Filters

By Dates [] = [] (00/00/0000) Add

By Applicant [] LIKE [] Add

By Education [] LIKE [] Add

By Employment [] LIKE [] Add

By Job Job Title [] LIKE [] Paralegal Add

By Location [] LIKE [] Add

Applicant Rating [] Add

By Referral Source [] Add

Resume Search [] Add

Note Search LIKE [] Add

By Zip Code Radius [] Within [] Add

Flag Color ☐ ☐ ☐ ☐ ☐ None Add

Viewed by Me [] Add

Sorting

Sort By [] Ascending Descending

Then By [] Ascending Descending

Then By [] Ascending Descending

Application Date Range

Date From [02/01/2017]

Date To [03/20/2017]

Result Type ☒ Text ☐ Excel

Generate Applicants

Current Filters

Status_Filter = Status.Active
job post = posttype.External
Job = Job Title LIKE Paralegal

Clear All Filters

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

Applicant Tracking > Manage Applicants > Advanced Search Results

Globally Search Applicants... Search

Batch Edit

Search Results

< >

Batch Edit	Flag	Viewed	Name	Rating	Email	Job Title	Job ID	Job Location	Post Date	Candidate Source	Referred By	Application Date	Complete App	Recruiter Name	Dept Code	Status	Background Check	Tax Credit	Hired	Knocked Out	Offered	Declined Offer	Saved	Rejected
No Records Found																								

Search

Name	Viewed	Email	Resume	Delete
JASON JONES	✓		View	Delete
JASON JONES			View	Delete
KIMBERLY WRIGHT			View	Delete



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."

The screenshot shows the 'Manage Applicant Tracking System Properties' page. The left sidebar contains the following menu items: Company Career Site Setup, Modern Career Portal Customization, Company Locations, Company Legalese, Email Letters, Interview Decision Reason, View Company Retention Policy, and Position Types. The right sidebar contains: Shift Types, Travel Types, Degree Types, Referral Sources, Job Forms, Rating System, and Tag Management (highlighted with a red box). The Tag Management option has a sub-link 'Update Candidate Tags'.

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.

The screenshot shows the 'Available Tags' section. At the top, there is a 'Create New Tag' button. Below it, there is a table with the following columns: Batch Edit, Tag Description, Candidates Attached, Created By, Date Created, Edit, and Delete. The table contains three rows of tags.

Batch Edit	Tag Description	Candidates Attached	Created By	Date Created	Edit	Delete
<input type="checkbox"/>	OSU Career Fair	0	pcm24e112b5e	2017-08-28 08:02:28		
<input type="checkbox"/>	Internship Experience	0	pcm24e112b5e	2017-08-28 08:02:50		
<input type="checkbox"/>	Experience with Adobe	0	pcm24e112b5e	2017-08-28 08:03:11		

Showing 1 to 3 of 3 entries



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."

Applicant Tracking > Applicant Tracking Dashboard > Application Information: Human Resources Coordinator - Soho House New York (Job ID:1461)

Search...

Return to Applications List Return to Dashboard

CHRIS MASON [43697] 3 of 13 Unrated

Email Address: revans@paycomdfw.com
Phone: (469) 444-1144

Applied for: Human Resources Coordinator - Soho House New York [Req ID: 794]
Assigned Recruiter: [None]

Current Step: Phone Interview
Scheduled For: RACHEL RODENBERGER

Application History: Maintain Application Record 4 Additional Application(s)

Application Actions: Customize Header, Use Default 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.

Header Settings

Available Header Items

Search

Select All

- ☒ Favorite
- ☒ Tags
- ☒ Email Address
- ☒ Phone
- ☒ Candidate Status
- ☒ Address
- ☒ Application History
- ☐ Flag
- ☐ Recruiters

Show Selected Fields Only

Included Header Items

Search

- 1 Favorite
- 2 Tags
- 3 Email Address
- 4 Phone
- 5 Candidate Status
- 6 Address

Save



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

Applicant Tracking > Applicant Tracking Dashboard > Candidate Information

Search...

Return to My Candidates Return to Dashboard

< Sarah Barnes [117568] > 1 of 3 • • • • • Unrated Favorite Candidate Actions

Email Address sbarnes@paycomonline.com Phone Status Active Address USA Application History 1 Application(s)

+ Add Tag

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

Add Tags

Type here and press Enter to create tag

Experience with Adobe
Internship Experience
OSU Career Fair

Cancel Save

Your tags will display in the candidate's profile.

Applicant Tracking > Applicant Tracking Dashboard > Candidate Information

Search...

Return to My Candidates Return to Dashboard

< Sarah Barnes [117568] > 1 of 3 • • • • • Unrated Favorite Candidate Actions

Email Address sbarnes@paycomonline.com Phone Status Active Address USA Application History 1 Application(s)

Experience with Adobe X

...

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.