Managing Applicants

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KANSAS STATE
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Introduction

Properly managing applications is an important part of being compliant in the hiring process. Application statuses needs to accurately reflect where they are at in the hiring process. You should **not** be waiting until the end of your search to move application statuses. This user guide will show you how to navigate to applications and move their statuses.

This user guide is intended for individuals identified with the **HR Liaison** user permission and located in the **HR Liaison** user field on the requisition (job card).

## From the Dropdown Menu (Manage Jobs)

1. Click on the dropdown menu to the left of the PageUp logo.

2. Click on **Manage jobs.** This will take you to the **Manage jobs** page where you should see requisitions that have you in the **Hiring Manager** or **HR Liaison** user field.

3. Locate your particular requisition and click on the job title to open the requisition.

4. Click on **View applications** in the upper right of the requisition. This will take you to the list of applications.
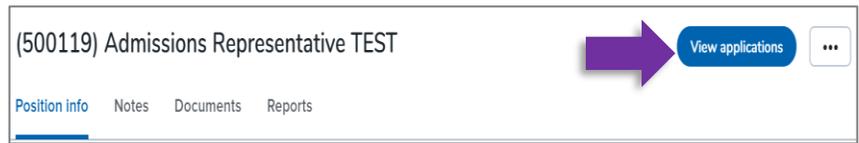
5. To navigate the Applicant Card, click on an applicant's first or last name (under the First name or Last name columns) in blue text to access the **Applicant Card** window.
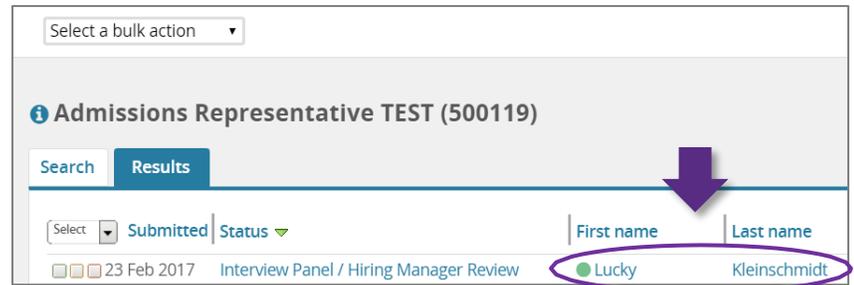
A. Navigating the Applicant Card

I. Applications Tab
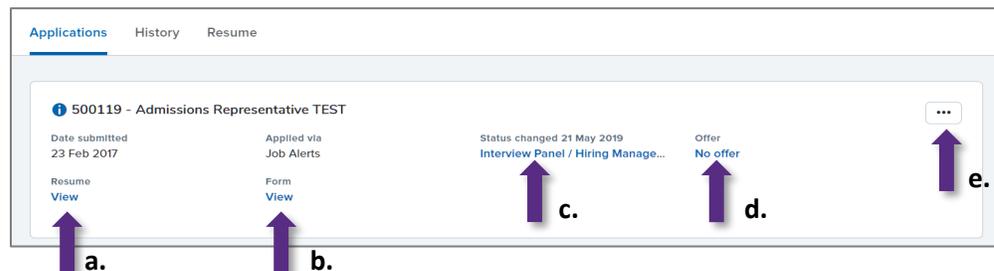
The Applications tab of the applicant card will show you the requisition which the applicant has applied to. Below is a diagram of the Applications tab functions:

a) *Access the resume/CV*: Click on **View** under the **Resume** header.

b) *Access the job application*: Click **View** in blue text under the **Form** header.

c) *Update the application status*: Click on the application status in blue text under the **Status changed [date]** header

d) *Access the Offer Card:* Click on the blue text under the **Offer** header. Review the **Managing Offers user guide** for more information on completing the offer card.

e) *Access the ... dropdown menu*: Click on the 3-dot drop down menu to the far right. Some of the actions are:

- **Add document** – Use to add any document pertaining to the applicant (screening and interview notes, interview itineraries, reference letters, etc.)
- **Add note** – Use to add comments or any email communications done outside of the system to the applicant card. For communication with the applicant via email, copy and paste the email as a NOTE.
- **Communicate** – To send an email to the applicant from the system. The communication will be tracked within the PageUp system. **This should be used for communications rather than personal or work email.
- **Compile and send** – Use to create a single PDF of all application materials which then can be sent via email to another user.
- **View references** – view the contact information for the applicant's references
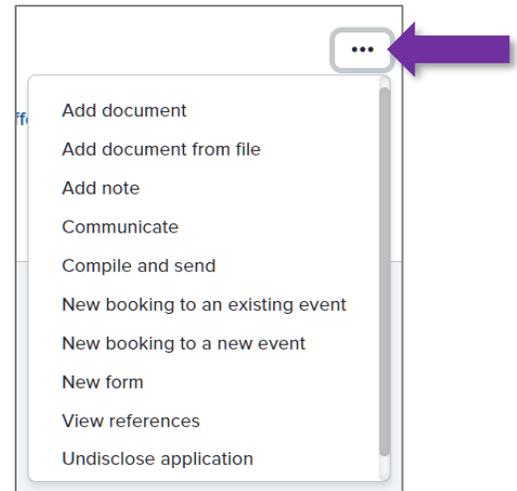
II.   History Tab

The History tab of the applicant card will show you transactions that occurred with an application for a particular job.

- The **Item drop down** allows you to sort by the type of transaction.

- The **Job drop down** allows you to sort by the jobs the applicant has applied to.
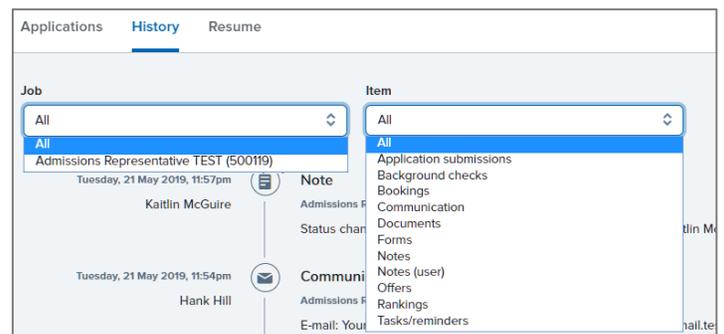
III.   Resume Tab

The Resume tab of the applicant card will display the applicant's resume/CV. If the document is not visible, you are also able to download it.

B. Updating Application Statuses

I. From Applicant Card

a) Click applicant's first or last name (under the First name or Last name columns) in blue text to access their **Applicant Card**
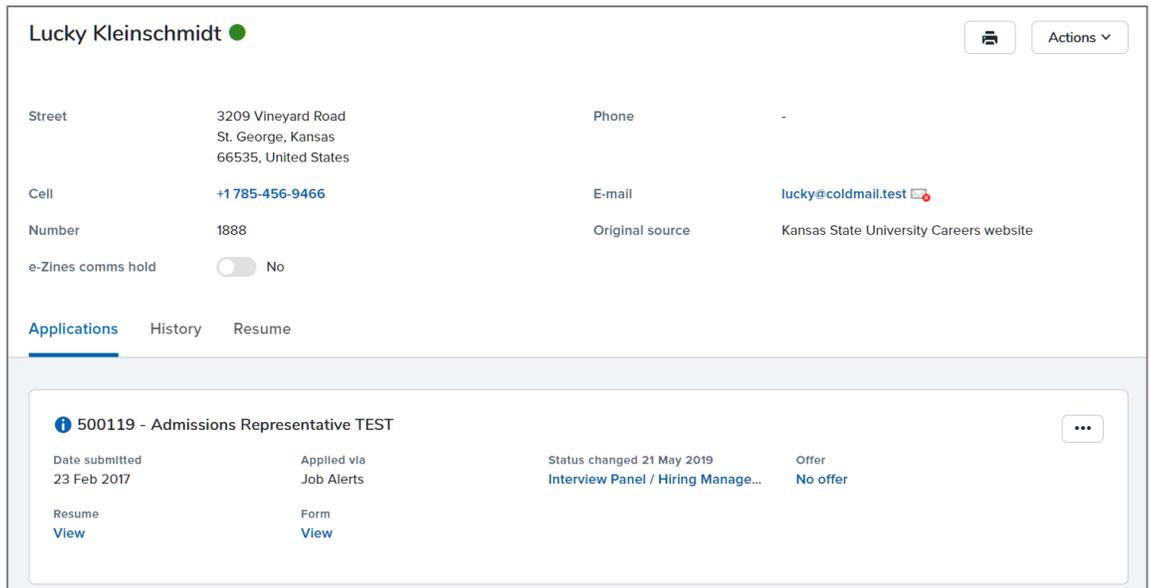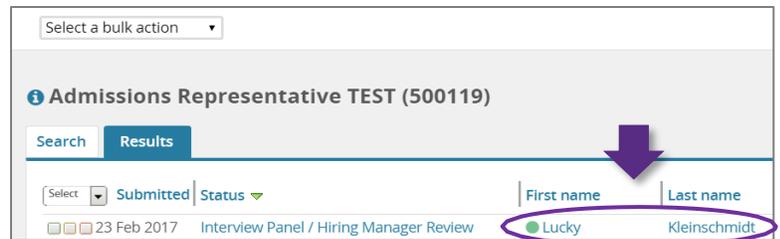
b) Click the application status in blue text under the **Status changed [date]** header

c) Select the most appropriate status.
Click **Next >**

→ **GO TO THE LIST OF STATUSES AND EXPLANATIONS SECTION TO UNDERSTAND WHICH STATUS COMES NEXT.**

d) If the status move is for an **unsuccessful status**, please indicate the **reason for non-selection**

e) DO NOT select **Yes** to update a job status!

f) Click **Move now** to finalize the status update.

II. From Applicant List

a) Click applicant's status (under the status column) in blue text to access the **Change application status** window.

Select a bulk action ▼
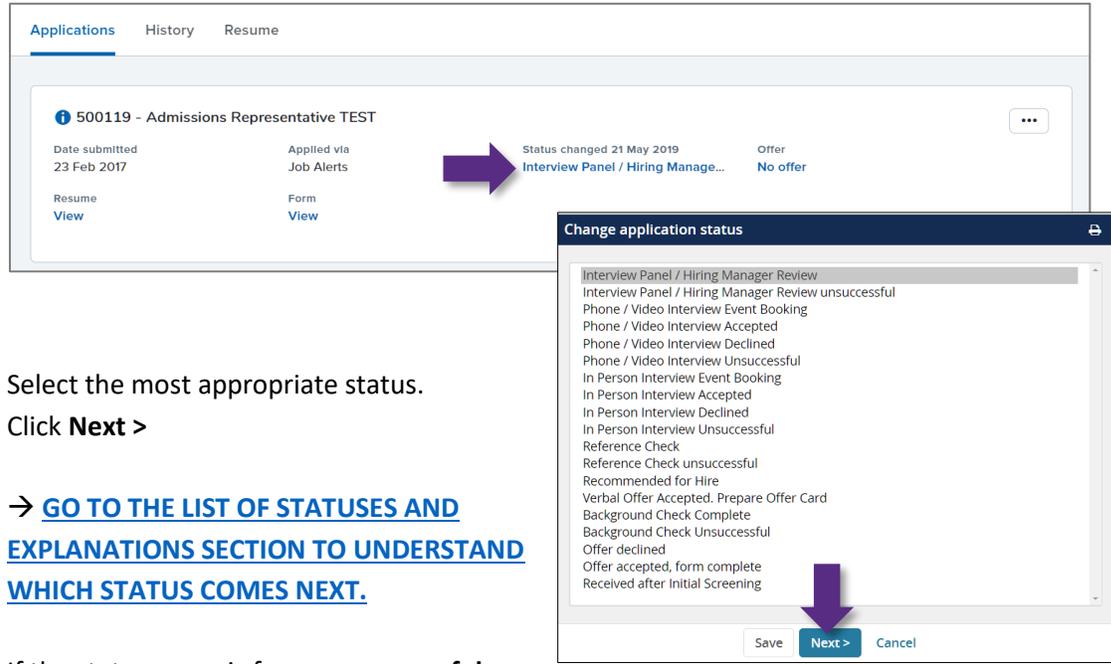
ⓘ **Admissions Representative TEST (500119)**

| Search | **Results** |

Select ▼ Submitted Status

☐☐☐ 9 Dec 2016   Interview Panel / Hiring Manager Review

☐☐☐ 30 Nov 2016   Recommended for Hire

Change application status   🖶

Interview Panel / Hiring Manager Review
Interview Panel / Hiring Manager Review unsuccessful
Phone / Video Interview Event Booking
Phone / Video Interview Accepted
Phone / Video Interview Declined
Phone / Video Interview Unsuccessful
In Person Interview Event Booking
In Person Interview Accepted
In Person Interview Declined
In Person Interview Unsuccessful
Reference Check
Reference Check unsuccessful
Recommended for Hire
Verbal Offer Accepted. Prepare Offer Card
Background Check Complete
Background Check Unsuccessful
Offer declined
Offer accepted, form complete
Received after Initial Screening

Save **Next >** Cancel

b) Select the most appropriate status. Click **Next >**

→ **GO TO THE LIST OF STATUSES AND EXPLANATIONS SECTION TO UNDERSTAND WHICH STATUS COMES NEXT.**

c) If the status move is for an **unsuccessful status**, please indicate the **reason for non-selection**

▬ Interview Panel / Hiring Manager Review unsuccessful reason

Please indicate the reason for selecting the interview panel / hiring manager review unsuccessful status:*

Select ▼

d) DO NOT select **Yes** to update a job status!
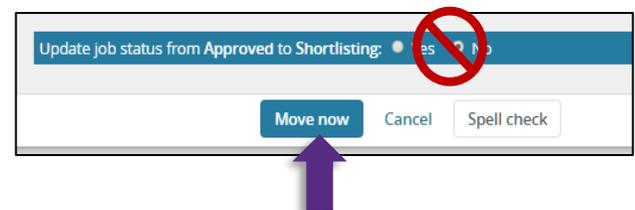
Update job status from **Approved** to **Shortlisting**: ⊙ Yes ○ No 🚫

e) Click **Move now** to finalize the status update.

Move now Cancel Spell check

## III. Multiple Application Statuses Update (Bulk Move)

To move multiple applicants for a single application status is accomplished by using **Bulk Move.** This is processed from the list of applicants. This option is available to users with HR Liaison permission **ONLY**.

The best way to utilize **Bulk Move** is to use the **green, yellow,** and **red check boxes** found to the left of the applicants. This feature is used to group applicants for a single status change. **It's important to note that your check box selections will be erased if you leave the application list page.** Below is an example of how to use the check boxes for a **Bulk Move.**

Example:
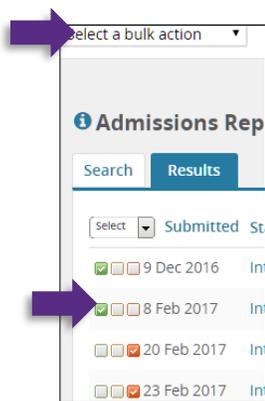
1. Applicant A and B did not meet minimum **education** requirements. Mark the **green check boxes** to the left of Applicant A and B.
2. Click **Select a bulk action** drop down.
3. Select **Bulk move.** You should see the **Bulk move** page and the number of applicants you have selected.
4. Select the **Application status** drop down and the appropriate status.
5. Select **Next**
6. You know your status changed was processed correctly when you see a notification line telling you the number of applicants you moved and the status they moved to AND you are taken back to the page with the list of applicants when you have changed the statuses for all of your groups.
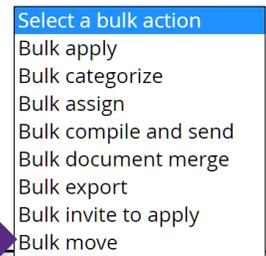
Managing Unsuccessful Applications – Reason for Non-Selection

When an applicant or candidate is no longer being considered and will not move forward, to create the excellent applicant experience, please notify the applicant as soon as the decision is made. Therefore, the applicant or candidate **NEEDS to be moved to an unsuccessful status as soon as the decision not to move forward with the individual. NOT at the end of the search.**

1. Start the process of updating the application status.

2. An email is already set up to be sent to the applicant or candidate when the individual is moved to one of the Unsuccessful statuses. The email which will be sent is already customized and individualized to show the applicant(s) name and specific job. **Notifying applicants at the end of the search who were never considered for the position creates a poor applicant experience!**
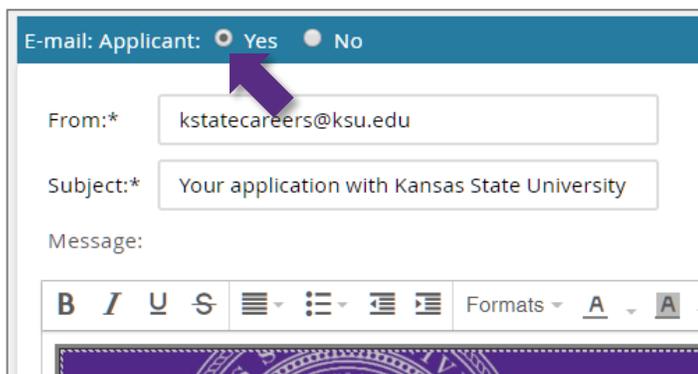
3. Select the most appropriate reason for non-selection under the **Interview Panel/ Hiring Manager Review unsuccessful reason** section. This information is tracked and should be an honest reflection to why an applicant or candidate was not selected.
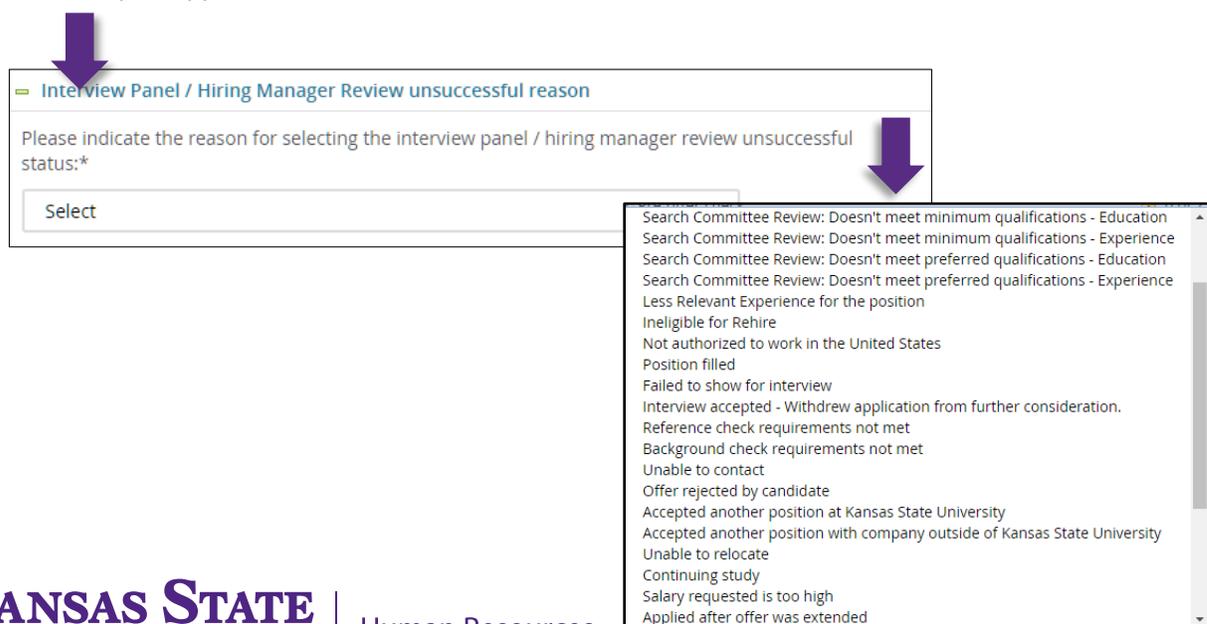
List of Statuses and Explanations

Screening	Interview Panel/Search Committee Review	USS/Unclassified –applicant is ready for the search chair and committee to begin screening
	Search Committee Review	Faculty – applicant is ready for the search chair and committee to begin screening
	Interview Panel/Search Committee Review Unsuccessful	USS/Unclassified – applicant will not proceed further and **should be notified (PageUp will send automatic communication)**
	Search Committee Review Unsuccessful	Faculty – applicant will not proceed further and **should be notified (PageUp will send automatic communication)**
Interviewing	Phone/ Video Interview Event Booking	Invite candidate to a phone or video interview event created in PageUp
	Phone/ Video Interview Accepted	Candidate accepted invitation to the phone or video interview event (automatically moved by PageUp)
	Phone/ Video Interview Declined	Candidate declined invitation to the phone or video interview event
	Phone/ Video Interview Unsuccessful	Candidate will not proceed further and **should be notified (PageUp can send an automatic communication)**
	In Person Interview Event Booking	Invite candidate to an in person interview event created in PageUp
	In Person Interview Accepted	Candidate accepted invitation to In person interview (automatically moved by PageUp)
	In Person Interview Declined	Candidate declined invitation to In person interview
	In Person Interview Unsuccessful	Candidate will not proceed further and **should be notified (PageUp can send an automatic communication)**
Reference Checking	Reference Check	USS/Unclassified – Reference checks done via phone call or request email through PageUp (contact your Talent Acquisition strategic partner to request email)
		Faculty – Request for Reference letters are automatically sent by PageUp
	Reference Check Unsuccessful	Reference check came back unsuccessful
Offering	Recommend for Hire	The top candidate has been identified
	Verbal Offer Accepted. Prepare Offer Card.	The verbal contingent offer has been made, candidate verbally accepted the contingent offer, and the offer card is completed, including offer letter and/or contract.

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