Managing Applications & Application Statuses

Introduction

This guide shows you how to manage applications from the Manage applications page. Manage applications is a search that shows applicants for a particular job. When you open the page, you see the results of the most recently run search.

You can use the Manage applications page to sort and organize applicants, as well as perform multiple tasks with applicants.

What you will do

- View applicants
- Interpret information on the applicant lists
- Identify actions you can take on applicant lists
- 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

Open Manage applications

In CHRS Recruiting, you can view applications from several starting points. These starting points open the Manage applications page with a selection of applicants.

- Dashboard
- Main Menu
- Job requisition

When to view applications

- Recruiters view and organize applicants as daily activity.
- Hiring managers view applications during the recruitment process.
- Search committees review applications during the recruitment process.

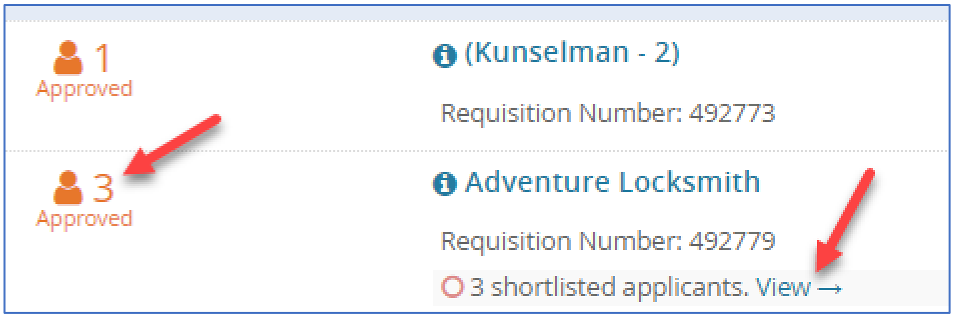
Prerequisites and assumptions

- You have permission to view applicants.
- You have permission to view jobs
- You have permission to view applications from the job card.

How to view applicants from the dashboard

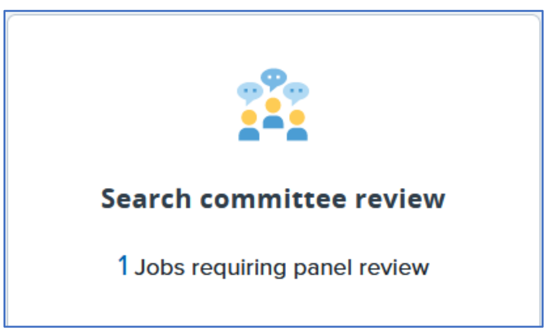
The Dashboard provides a high-level overview of the applicants that have applied to your jobs.

- On the Recruiter Dashboard, you can click the Applicant icon or a View link to show the applicants for that job.



- On the Hiring Manager Dashboard, you can click the links on the Applications tile to see applicants.

- If the Applications tile is not available for your permission group, you can click the link on the Search Committee Review tile.

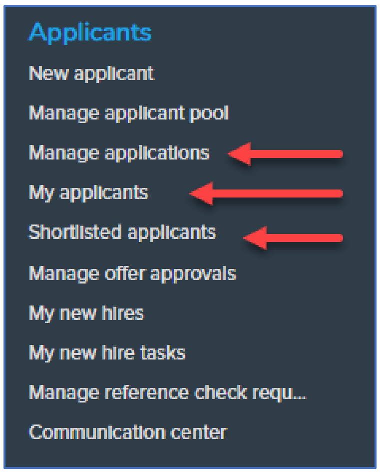


How to view applicants from the Main Menu

From the Main Menu, you can use several links to view applicants. To access a set of applicants, click one of these options:

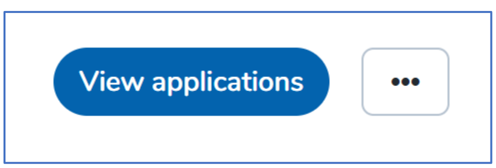
- **Manage applications** shows applications for jobs that you posted.
- **My applicants** shows applicants that have been assigned to you to review.
- **Shortlisted applicants** shows applicants for jobs that you posted who have been shortlisted.

Depending on your role, your Main Menu might have fewer options.



How to view applications from the job card

From the job card, click **View applications** at the top of the page.



What happens next

The Manage applications page opens, showing selected applicants.

Interpret information on the applicant lists

The Manage applications page displays information about applicants. Some of this information is in graphical form for quick visual sorting.

When to interpret information on applicant lists

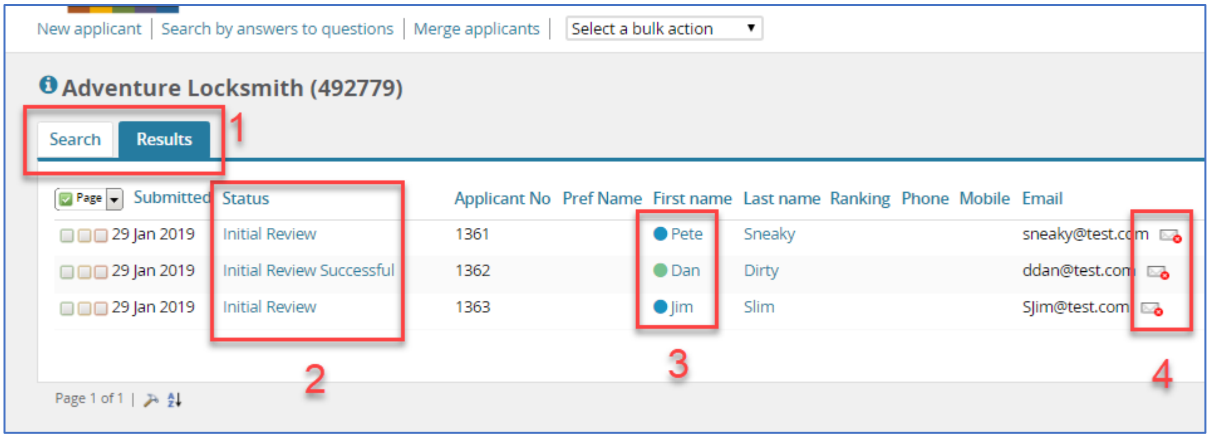
- You are examining applicants for a position.
- You need to quickly assess a large population of applicants.

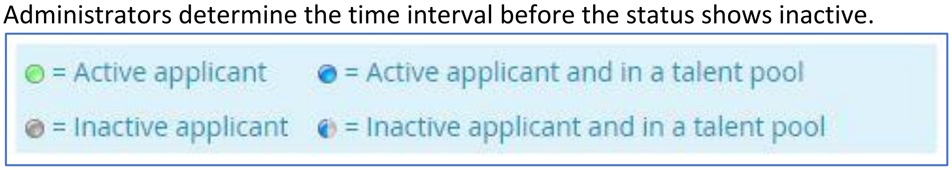
Prerequisites and assumptions

- You have permission to view applicants.
- You are on the Manage applications page.

Applicant list layout (left side)

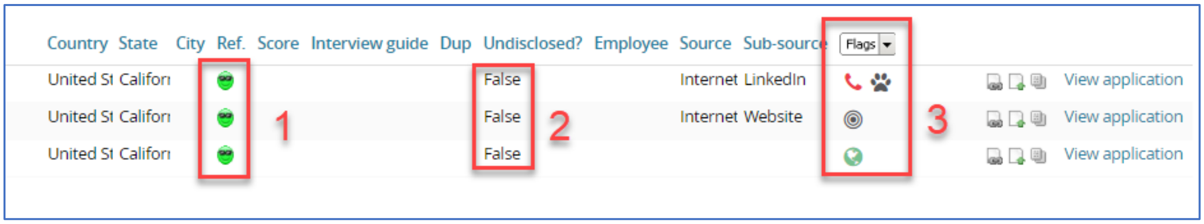
The graphic shows the left side of the applicant list.



#	Object	Information
1	Search and Results tabs	The Manage applications page is a search result. It shows applications for a particular job. You can click the Search tab to change the search parameters. Your last search is retained by default, so if you need to see a new set of applicants, you can adjust your search on the Search tab. If no job is specified, the search returns zero results.
2	Application status	The Status for each applicant is shown.
3	Activity indicator	The blue and green circles show the applicant's activity level. Activity is determined by the most recent status change that was initiated by the applicant. Administrators determine the time interval before the status shows inactive. 
4	Email icon	The icon to the right of the email address indicates a problem with emailing the applicant. In this example, the email addresses were invalid.

Applicant list layout (right side)

The graphic shows the columns at the right side of the applicant list.



#	Object	Information
1	Referred by employee	The green smiley face icon indicates that this applicant was referred by an employee.
2	Undisclosed column	This setting allows recruiters to track an application against a job without the candidate being aware (the application is hidden from view on the applicant portal).
3	Flags	Flags are visual cues that identify important information about applicants or applications. Flags can be set on the applicant or on the application, and their meaning is configured by CO Super Users.

What happens next

You can take several actions on this page, described in the next section.

Identify actions you can take on applicant lists

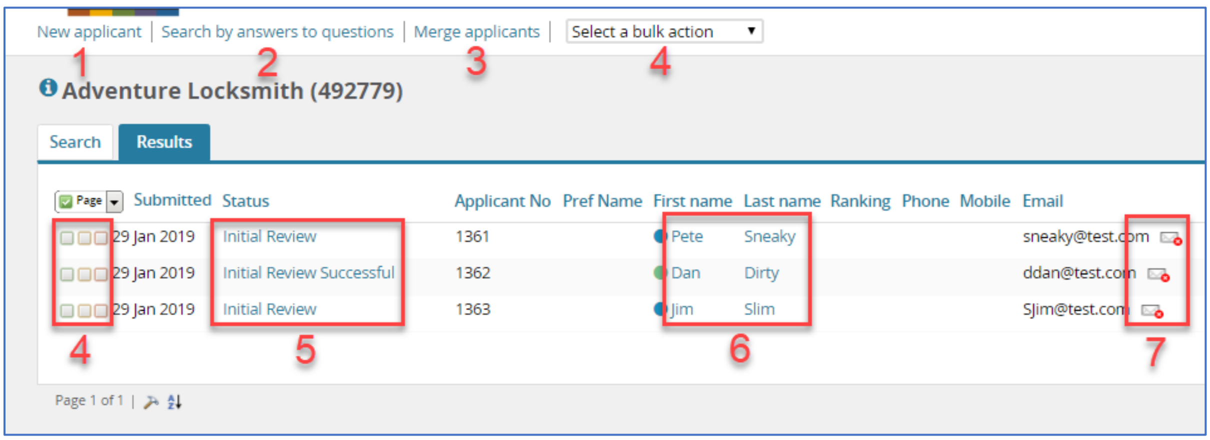
You can complete several actions on applications directly from the applicant list, without going into the Applicant card.

Prerequisites and assumptions

- You are on the Manage applications page.
- You have permission to view applicants.
- You have permission to update applicants' statuses.
- You have permission to edit applicants' information.

Applicant list actions (left side)

The graphic shows the left side of the applicant list.

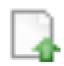
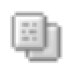


#	Object	Information
1	New applicant	Create an applicant directly in the system. Applicants show as employee referred. You might use this feature when you are speaking with an applicant on the phone to add them to a job without directing them to the career website.
2	Search by answers to questions	You can search for applicants based on their answers to questions on their application forms.
3	Merge applicants	If two applicants appear to be the same person, you can merge them into one applicant. ***This function should only be handled by an HR or Faculty Affairs and Success representative.***

#	Object	Information
4	Applicant check boxes and Select a bulk action menu	You can select applicants using the green, yellow, and red check boxes on the left. The colors have no meaning except a way to group applicants for a bulk action. With the applicants selected, you can use the **Select a bulk action** menu to perform a bulk action on selected applicants. Bulk actions include: • Bulk apply • Bulk categorize • Bulk assign • Bulk communicate • Bulk compile and send • Bulk document merge • Bulk export • Bulk invite to apply • Bulk move • Bulk move and send • Bulk reference check • Bulk send • Bulk task/reminder
5	Application statuses	Click the application status to change the status of the applicant. You can also do this with bulk move.
6	Applicant name	Click the applicant's name to open the Applicant card.
7	Email icon	Click the email icon to edit the applicant's information, including their email address, name, and home address.

Applicant list actions (right side)

The graphic shows the right side of the applicant list.

#	Object	Information
1	Flag selector	Select a flag from the list to sort applicants with that flag to the top.
2	Link icons	Use these three icons to view information about the applicant:  View resume  Download resume  View answers
3	View application	This link opens the Applicant card.

Overview of recruitment processes

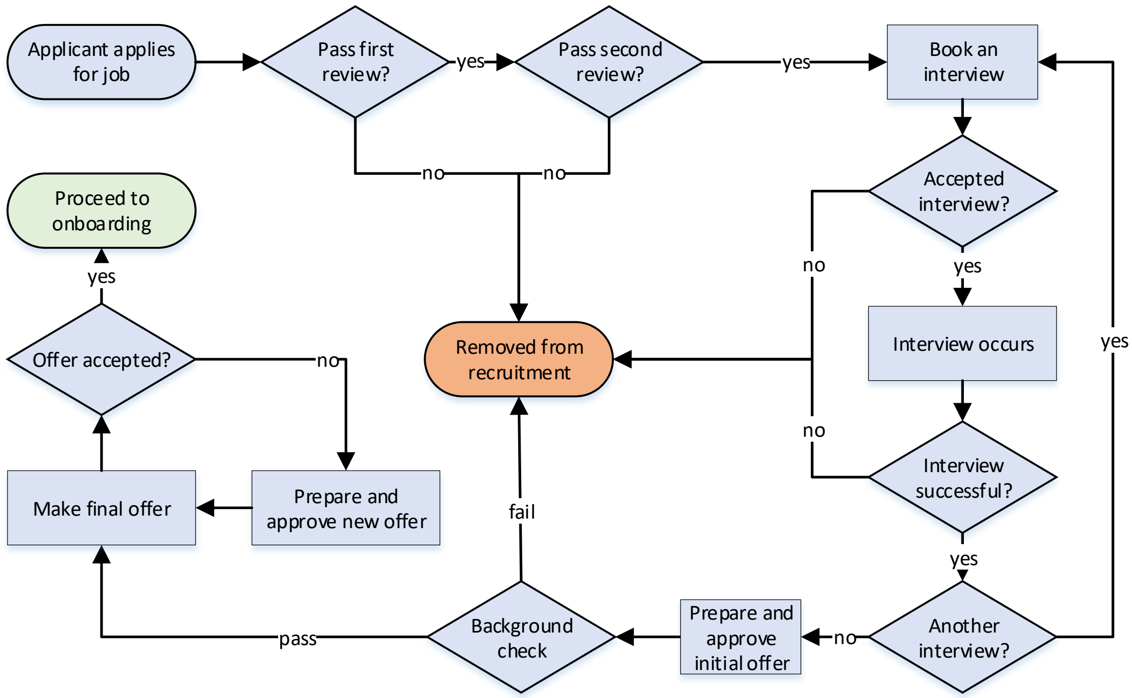
The recruiting process refers to the process through which an applicant is moved from the time the application is received to the applicant being hired.

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, refer to the application statuses guide for your recruitment type.

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		

Hints and tips

There are several statuses to indicate where the applicant was dropped from the recruiting process. These statuses show the point in the process where the applicant was no longer being considered. This information might be useful to hiring managers.

View an applicant's status

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 Main Menu.
- The applicant card also shows the status of a particular applicant.

When to view an applicant's status

- 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 Main Menu

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

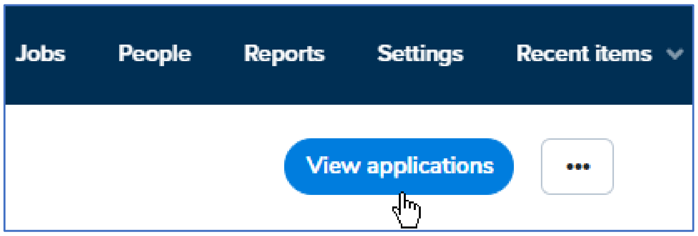
1. Open the Main Menu.
2. Click any of the following links:

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

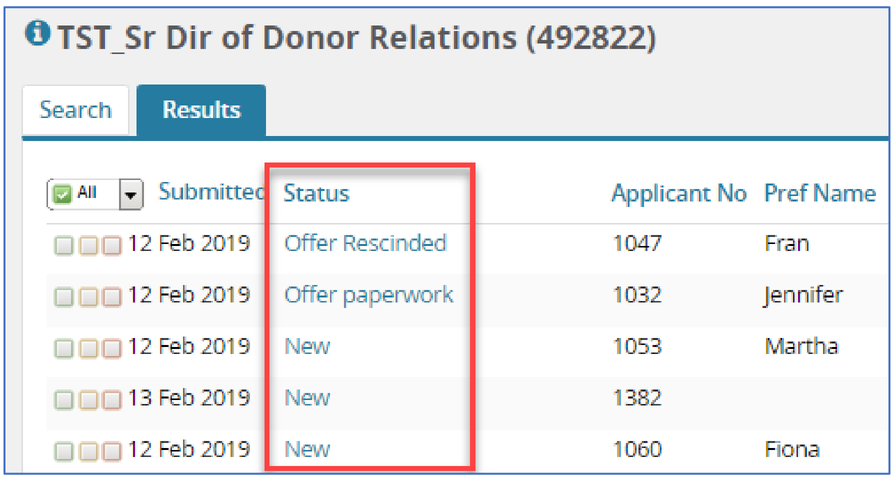
Each of these applicant lists has a **Status** column that shows the applicant's status.

How to view an applicant's status from a job

1. On the job requisition, click **View Applications** at the top of the page.



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



Hints and tips

- 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**.

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.
- Specify a reason for the status change.

When to change an applicant's status

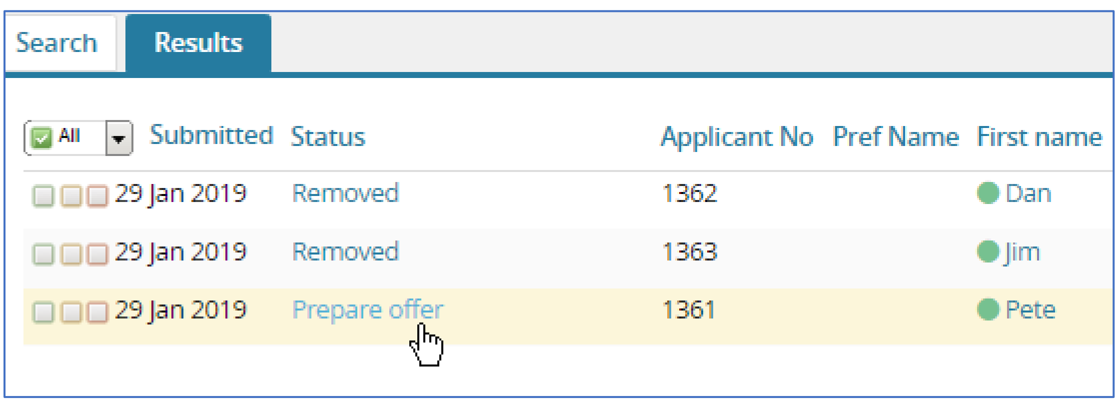
Change the applicant's status whenever you need to manually move the applicant to a different stage of the recruitment process.

Prerequisites and assumptions

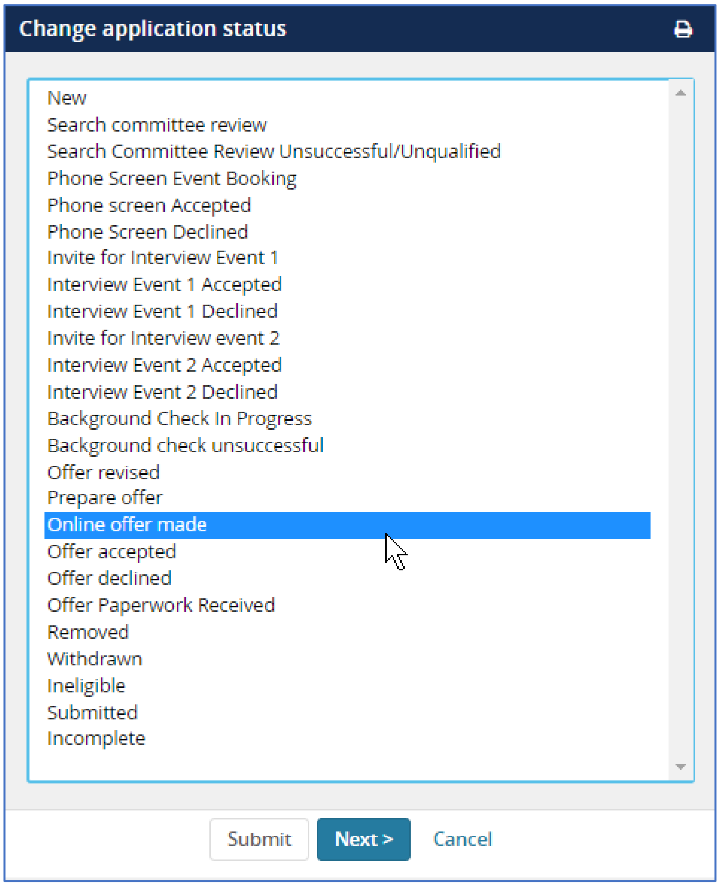
- You have permission to change an applicant's status.
- The status change is not automatically triggered by another action.
- You know how to open the job requisition.

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.



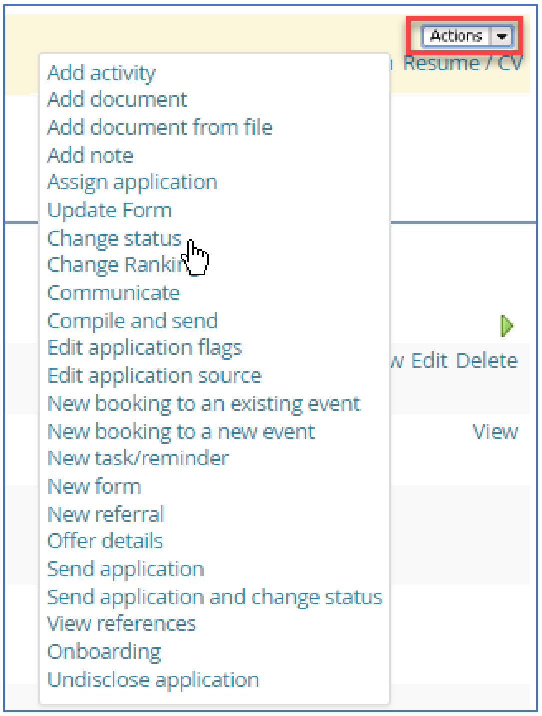
4. Select the status to move the applicant to.



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

Guidelines

- 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

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

Confirm the status change

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
- Provide a reason for the status change
- 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

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

Prerequisites and assumptions

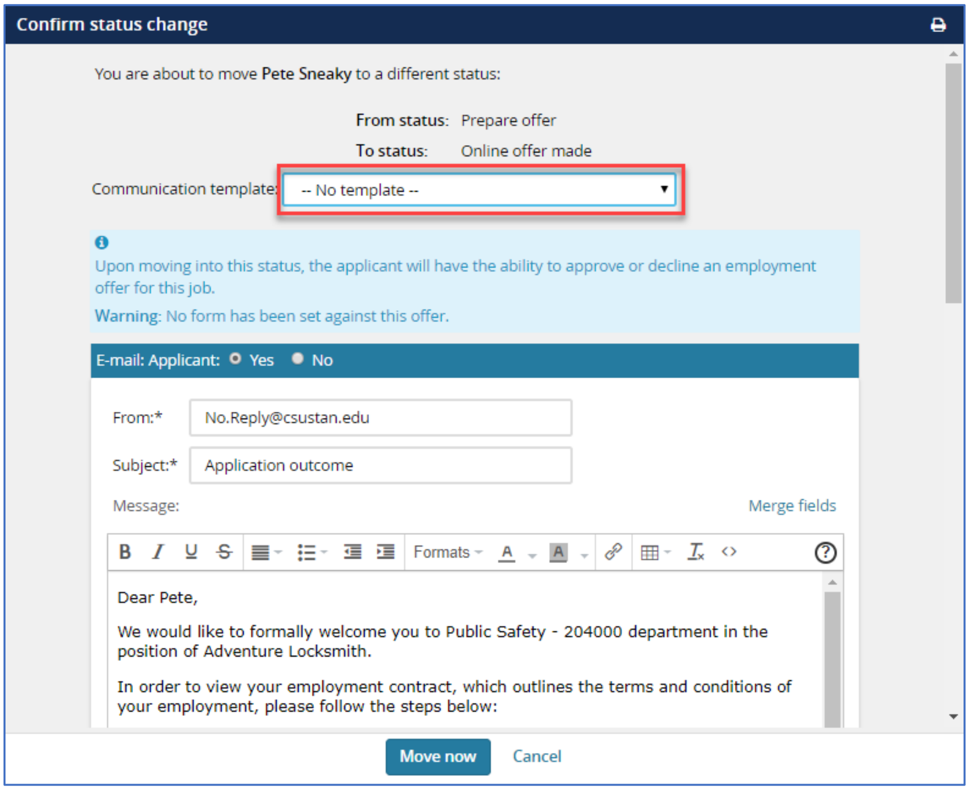
- You selected a new status for an applicant.
- You clicked **Next** on the **Change status** page.

How to prepare an email

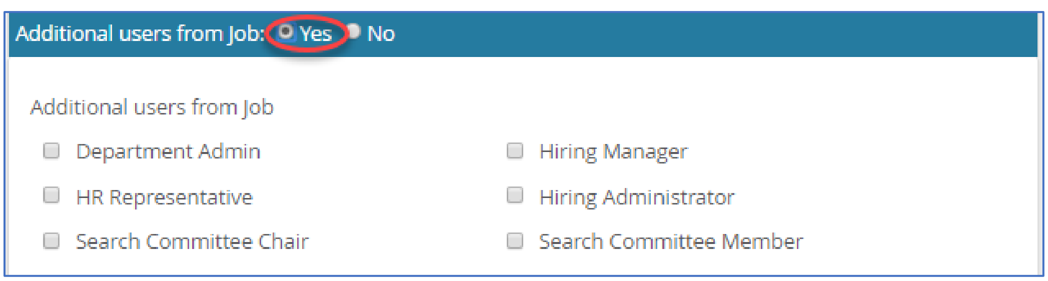
You must ensure that the email notification is personalized, properly branded, and accurate.

1. Select your campus's branded communication template – This step is not applicable for the Chico campus.

2. Review the email message.



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.



    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

- 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.

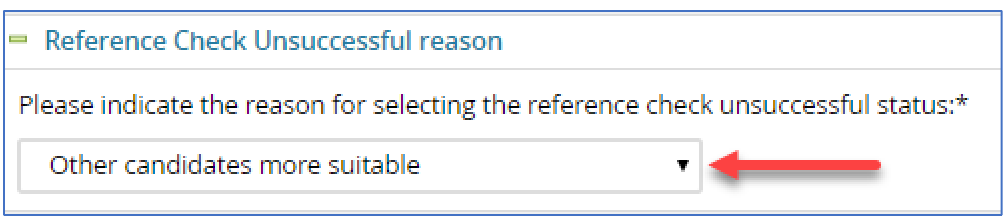
What happens next

- 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

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.



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

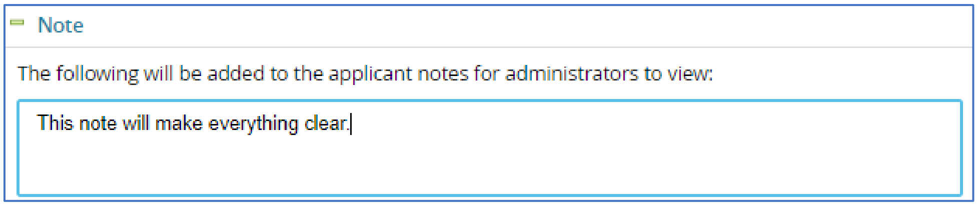
What happens next

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

How to add a note to the applicant history

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.



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

What happens next

- 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.