

Applicant Screening and Creating a Hiring Proposal

PeopleAdmin User Guide

This guide is intended to assist hiring managers in reviewing applications, updating applicant statuses, recommending an applicant for hire, and creating the hiring proposal.



Rev. 4.2020

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Logging into PeopleAdmin

To log into the system:

- go to: jobs.hr.txstate.edu/hr
- (Firefox is recommended but Chrome, Explorer, and Safari can be used)
- click on “Login with your Texas State ID here.” or “SSO Authentication”
- do not input username and password.

Texas State University

[Login with your Texas State ID here.](#)

Guest User Login ONLY

Username

Password

Log In

[Authenticate with single sign-on? SSO Authentication](#)

- User will be re-directed to the Texas State Login to PeopleAdmin 7
- Login with NetID and Password

TEXAS STATE

Login to PeopleAdmin 7 Texas State University

NetID

Password

[> Forgot your password?](#)

[> Activate your NetID](#)

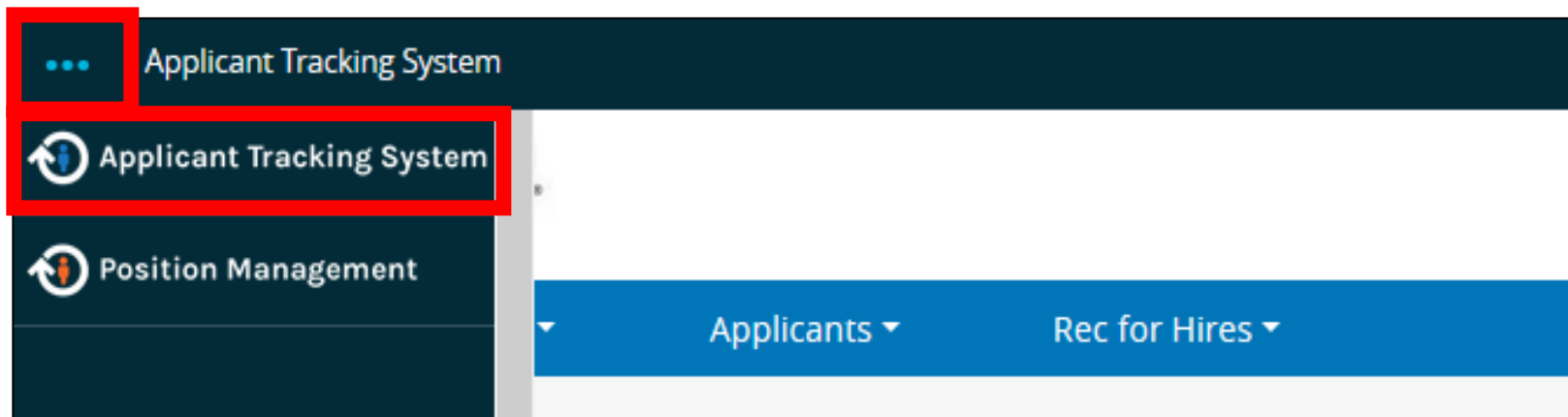
Login

PEOPLEADMIN

Use of computer and network facilities owned or operated by Texas State University requires prior authorization. Unauthorized access is prohibited. Usage may be subject to security testing and monitoring, and affords no privacy guarantees or expectations except as otherwise provided by applicable privacy laws. Abuse is subject to criminal prosecution. Use of these facilities implies agreement to comply with the policies of Texas State University.

Use Applicant Tracking System Module

Use the Applicant Tracking System Module by clicking on the three blue dots in the top left-hand corner of the PeopleAdmin home page and switching over to the module if needed.



Change the User Group

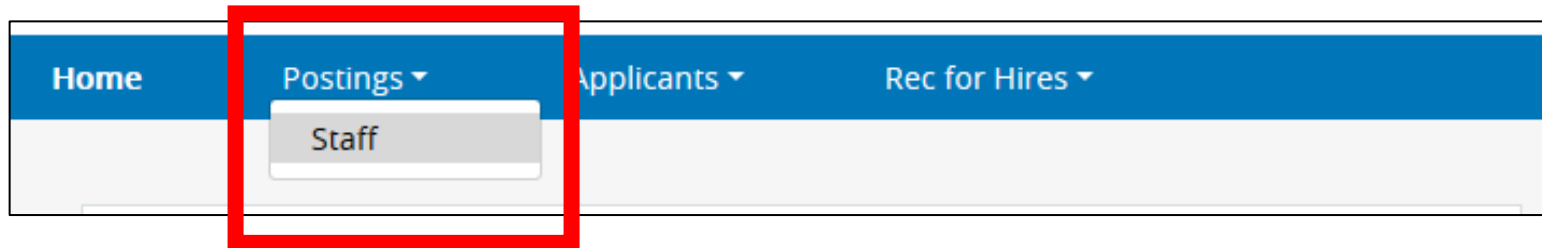
Use the drop-down menu and select the Hiring Manager user group

The screenshot shows the Applicant Tracking System interface for Texas State University. The top navigation bar includes the system name, the user's name (LynnAnn Brewer), and links for My Profile, Help, and Logout. The main header features the university logo and a user group dropdown menu, which is highlighted with a red box and currently shows "Hiring Manager". Below the header is a blue navigation bar with links for Home, Postings, Applicants, Rec for Hires, and Shortcuts. The main content area displays a dashboard with several widgets: an Inbox, Postings (with a notification badge), Users, Rec for Hires (with a notification badge of 8), Position Requests (with a notification badge of 3), Special Handling Lists, and a summary box for "27 Filled Postings Last 30 days".

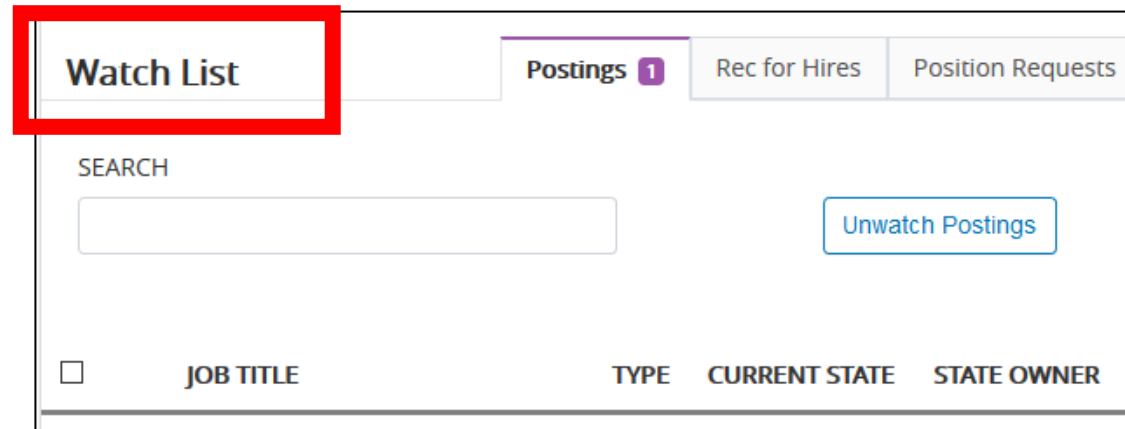
Navigate to the Job Posting

There are two ways to see the job posting.

1. Navigate to Posting and Select Staff




2. If the hiring manager, added the posting to their Watch List, they will be able to find it in the Watch List Posting In Box



- Click on the link to the job posting
- Navigate to the Applicant tab in the job posting

Home Postings ▾ Applicants ▾ Rec for Hires ▾ Shortcuts ▾

Postings / Staff / Systems Support Spec II (Closed) / Summary Search Results:

 **Posting: Systems Support Spec II (Staff)** [Edit](#)

Current Status: Closed

Position Type: **Staff** Created by: **Danielle McEwen**

Department: **Psychology (50000102)** Owner: **HR Employment**

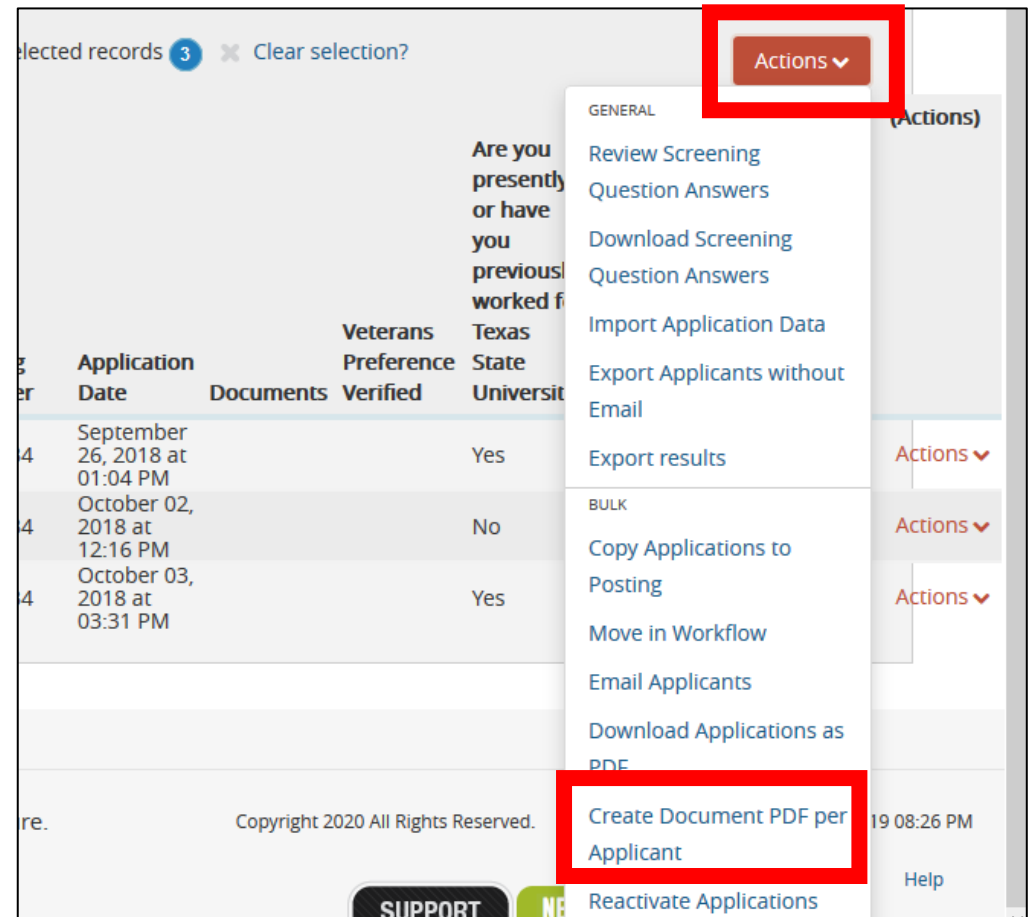
Summary History Settings **Applicants** Reports Rec for Hires Associated Position Description

Take Action On Posting ▾

- ★ See how Posting looks to Applicant
- 🖨️ Print Preview (Applicant View)
- 🖨️ Print Preview
- 🔖 Add to Watch List

Review Applicant Information

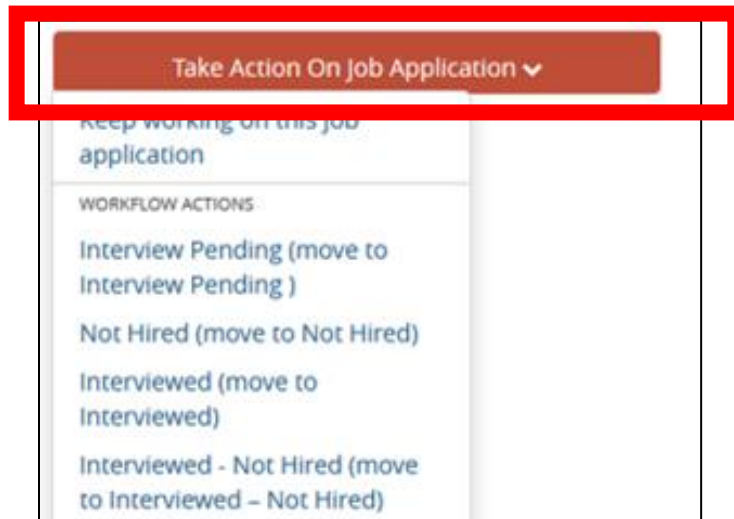
- Hiring managers may review the applications online by clicking on the applicant's name. This will open the applicant's application.
- The hiring manager may also print all the application and review the documents on paper.
 - Click the orange action button in the applicant tab and select Create Document PDF per Applicant. This action will create and open Adobe Reader. In Adobe Reader, the hiring manager may save and print applications.
 - Helpful tip: during the review, the Hiring Matrix can be prepared simultaneously as the hiring manager and/or search committee reviews the applications. Here is the link to the [Hiring Matrix](#) and [Guide](#)



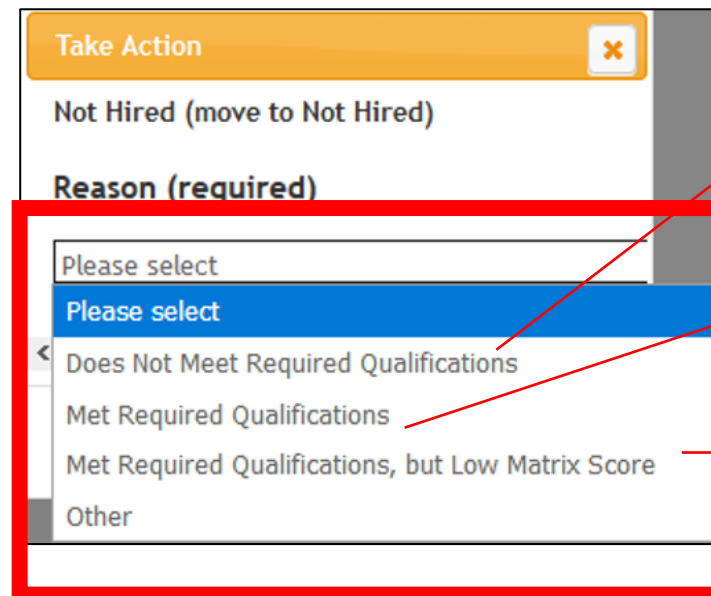
Update Applicant Statuses

There are two ways to update applicant statuses. Individually per application or in bulk.

- The hiring manager may update individual applicant status as they review the application
 - Click on the applicant the last name and open the application
 - Click on the orange button Take Action on Job Application and select workflow



Selecting Not Hired will require a reason for not selecting the applicant.



Selecting Does Not Meet Required Qualifications will require an explanation. This reason needs to match the Hiring Matrix scoring showing zero for the qualification.

Selecting Met Require Qualifications will require an explanation.

Selecting Met Required Qual., but Low Matrix Score will not require an explanation, however the Hiring Matrix will need to demonstrate the low score.

Provide an explanation for the reason selected and click the Submit button.

The image shows a 'Take Action' dialog box with a yellow header and a close button. The main content area is titled 'Not Hired (move to Not Hired)'. Below this, there is a section labeled 'Reason (required)'. A dropdown menu is open, showing the selected option 'Does Not Meet Required Qualifications'. Below the dropdown is a text input field for providing an explanation, which is currently empty. At the bottom of the dialog, there are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with a red box.

Take Action

Not Hired (move to Not Hired)

Reason (required)

Does Not Meet Required Qualifications

Explanation

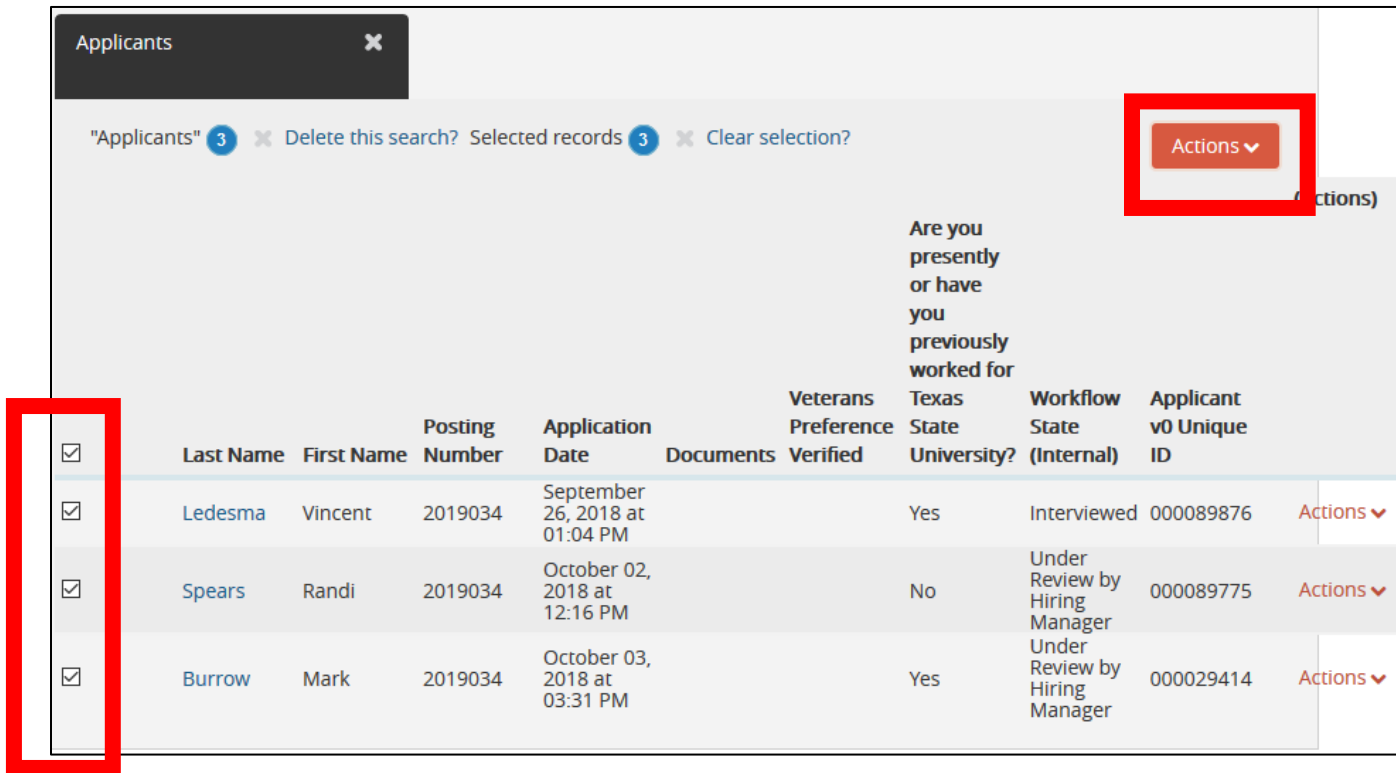
Submit Cancel

Helpful tip: Applicant workflow set up in the system:

Interview Pending	No other entry needed. This action will keep the applicant in the applicant tab for further workflow actions.	
Not Hired	Reasons	Explanation
	Does not Meet Qualifications	Explanation needed. Hiring Matrix need to show zero for the qualification the applicant did not meet
	Met Required Qualifications	Explanation needed
	Met Required Qualification, but Low Matrix Score	No explanation needed but scores will need to be demonstrated in Hiring Matrix
	Other	Explanation needed
Interviewed	No other entry needed. This action will keep the applicant in the applicant tab for further workflow actions.	
Interviewed Not Hired	Reasons	Explanation
	<ul style="list-style-type: none"> • Job Offered But Turned Down • Failed to meet minimum/desired education or experience • Insufficient experience • Relatively weak in knowledge, skills, and abilities • Unfavorable reference check • Weak in verbal communications • Weak in writing skills • Interviewed, willing to accept as an alternate • Other 	Explanation needed for any reason
Recommend for Hire	Reason	Explanation
	Recommend for Hire	Explanation needed

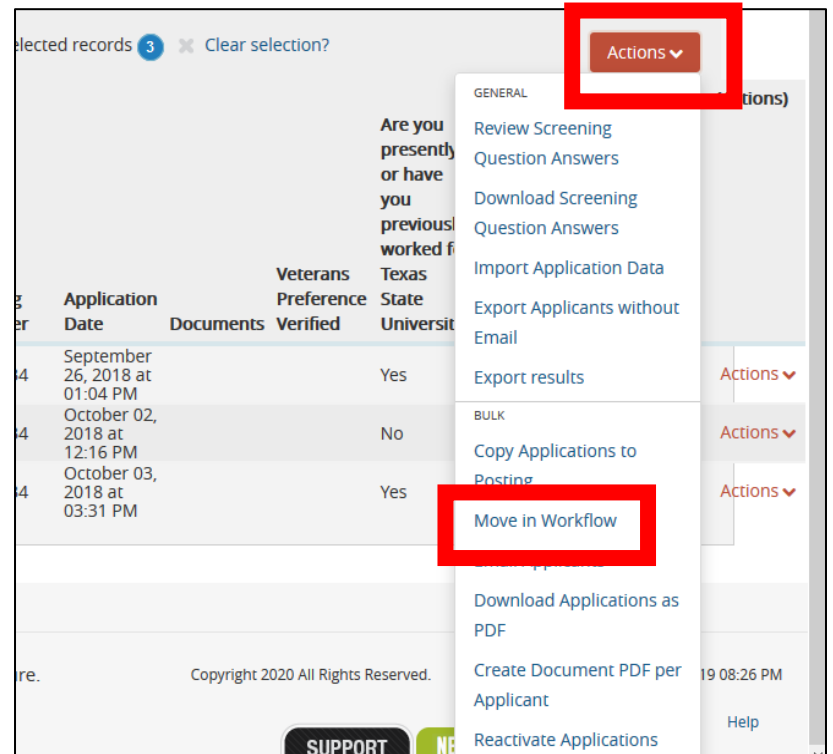
The hiring manager may also update all applicant statuses in bulk.

- Check the box next to the Last Name field and selecting all applicants, clicking on the orange Action button, and selecting Move in Workflow.



The screenshot shows a table of applicants with a search bar at the top. The search bar contains "Applicants" and "3" selected records. Below the search bar, there are three checkboxes, each with a "3" next to it, indicating that all three records are selected. The table has the following columns: Last Name, First Name, Posting Number, Application Date, Documents, Veterans Preference Verified, Texas State University?, Workflow State (Internal), and Applicant v0 Unique ID. The first three rows are highlighted in light blue, indicating they are selected. The first row is: Ledesma, Vincent, 2019034, September 26, 2018 at 01:04 PM, Yes, Interviewed, 000089876. The second row is: Spears, Randi, 2019034, October 02, 2018 at 12:16 PM, No, Under Review by Hiring Manager, 000089775. The third row is: Burrow, Mark, 2019034, October 03, 2018 at 03:31 PM, Yes, Under Review by Hiring Manager, 000029414. A red box highlights the checkboxes in the first column.

<input checked="" type="checkbox"/>	Last Name	First Name	Posting Number	Application Date	Documents	Veterans Preference Verified	Texas State University?	Workflow State (Internal)	Applicant v0 Unique ID	Actions
<input checked="" type="checkbox"/>	Ledesma	Vincent	2019034	September 26, 2018 at 01:04 PM		Yes	Yes	Interviewed	000089876	Actions
<input checked="" type="checkbox"/>	Spears	Randi	2019034	October 02, 2018 at 12:16 PM		No	No	Under Review by Hiring Manager	000089775	Actions
<input checked="" type="checkbox"/>	Burrow	Mark	2019034	October 03, 2018 at 03:31 PM		Yes	Yes	Under Review by Hiring Manager	000029414	Actions



The screenshot shows the Actions dropdown menu for the selected records. The menu is open, and the "Move in Workflow" option is highlighted with a red box. The menu items are: Review Screening Question Answers, Download Screening Question Answers, Import Application Data, Export Applicants without Email, Export results, Copy Applications to Posting, Download Applications as PDF, Create Document PDF per Applicant, and Reactivate Applications. A red box also highlights the "Actions" button at the top of the menu.

Application Date	Documents	Veterans Preference Verified	Texas State University?	Actions
September 26, 2018 at 01:04 PM		Yes	Yes	Actions
October 02, 2018 at 12:16 PM		No	No	Actions
October 03, 2018 at 03:31 PM		Yes	Yes	Actions

Update each applicant by selecting the workflow state drop-down menu per applicant.

New State	Reason	Group Prompt User
Select a workflow state...		

User
Select a workflow state...
Select a workflow state...
Interviewed – Not Hired
Recommend for Hire
Alternate
Under Review by Hiring Manager
Move to Draft
Move to Interview Pending
Move to Hired
Move to Not Hired
Move to System Det Does Not Meet Minimum Qualifications
Move to Withdrawn

Save changes

Cancel

Recommend one applicant for hire individually or during the bulk workflow.

Individually

Take Action On Job Application ▾

Keep working on this job application

WORKFLOW ACTIONS

Interviewed – Not Hired (move to Interviewed – Not Hired)

Recommend for Hire (move to Recommend for Hire)

Willing to accept as an alternate (move to Alternate)

Under Review by Hiring Manager (move to Under Review by Hiring Manager)

Bulk workflow

Under Review by Hiring Manager

Recommend for Hire ▾

Explanation:

Move to Recommend for Hire ▾

Create a hiring proposal and recommendation for hire.

Navigate to the applicant's application and select the link Start Regular Staff Hiring Proposal

Take Action On Job Application ▾

- ★ View Posting Applied To
- ★ Preview Application
- ✎ Edit Application
- 📄 View Completed Rec for Hire
- ➕ Start Regular Staff Hiring Proposal**

Select the Position Description.

Selected Position Description

This Rec for Hire is currently connected to the following Position Description:

- Systems Support Spec II
Select Position Description

To change the Position Description connected to this Rec for Hire, please select an alternative Position Description using the Search below.

Position Descriptions

Saved Searches ▾ Search **Hide Search Options ▾**

Add Column: ▾
Department:

Staff Position Description ✕

"Staff Position Description" 2918 ✕ Delete this search?

← Previous 1 2 3 4 5 6 7 8 9 ... 97 98 Next →

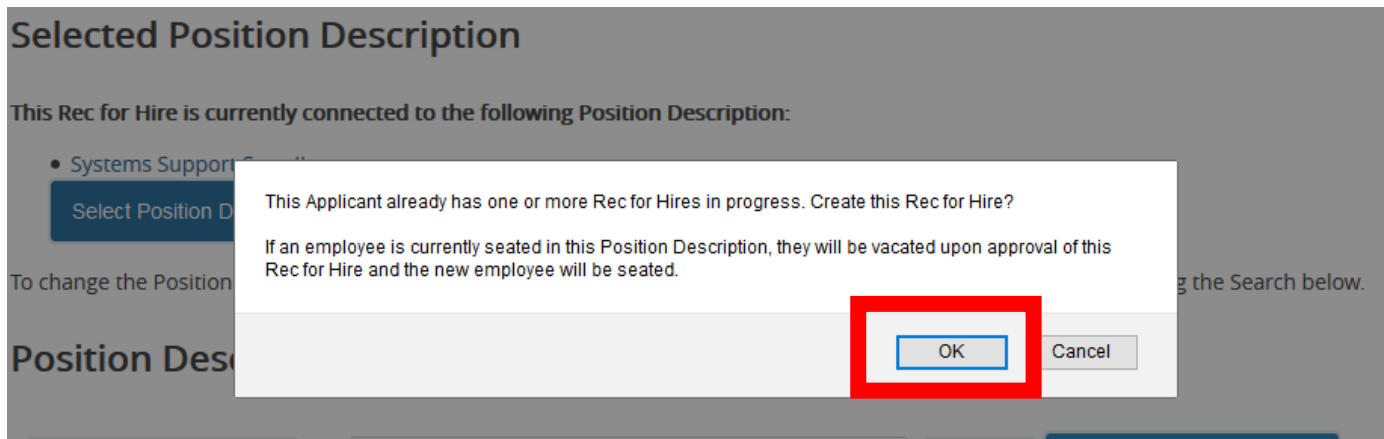
(Actions)

Position Description Number	Position Description Title	Job Code Long Text	Supervisor
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Helpful tip: a pop up may come up. This notifies the hiring manager that the applicant has one or more Rec for Hire and that another department has also started a hiring proposal for the applicant and is also interested in the applicant for their position.

Or it may state that an employee is seated in the Position Description and this action will vacate the employee and seat the new employee.

Select OK.



Complete the Hiring Proposal form and click Next.

Hiring Proposal Information

Hiring Proposal Number

* Reason For Selection of Candidate

This field is required.

Actual Starting Salary: 50422.20

Actual Start Date

Orientation Date

Texas State Staff User/NetID Information

Departments are responsible for submitting Staff NetID requests to obtain the required data for the Texas State NetID and Texas State ID fields below. The only NetID request type appropriate for Staff hires completed in PeopleAdmin is the Request Type of STAFF. No other Request Type should be requested. Staff NetID requests must be submitted for both new hires and for the reactivation of rehires. Requests must have an Expiration Date set at least 45 days from the projected Official Start Date to allow for enough time to complete hiring and onboarding processes. If a request expires before a position is filled, departments must submit a new request. Legal names must be entered when submitting a Staff NetID request. Click [here](#) to submit a Staff NetID request.

* Texas State NetID -

This field is required.

* Texas State ID - (XXXXXXXX)

This field is required.
(Include "A")

Save Next >>

Enter the reason why the hiring manager is selecting this candidate for hire. This reason needs to match the reason indicated in the hiring matrix.

Enter the Texas State NetID and ID. Hiring manager may request the department head for this information or if authorized may request for the [NetID and ID](#)

- [Instructions](#)

Hiring Proposal Documents Save << Prev Next >>

PDF conversion must be completed for the document to be valid when applicable.

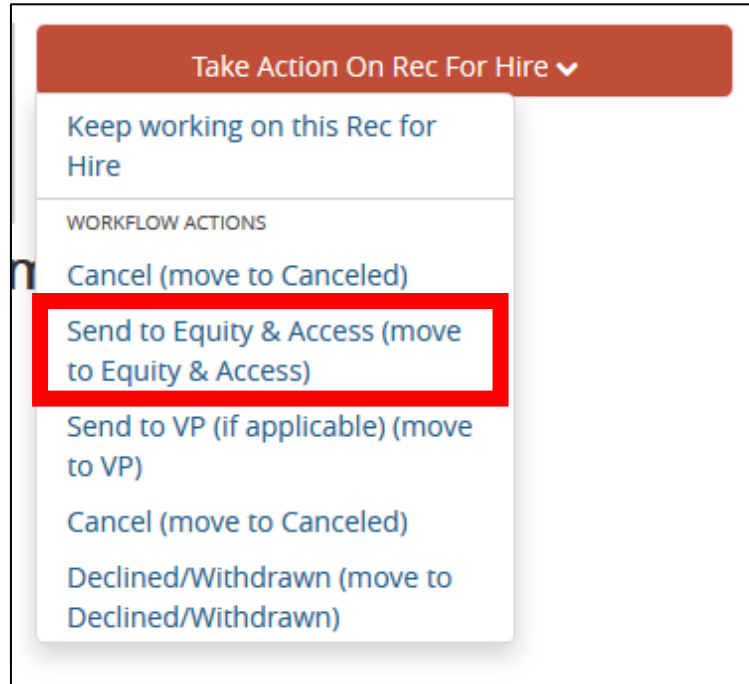
Document Type	Name	Status	(Actions)
Hiring Matrix			Actions ▼
Contract Offer Recommendation (for Faculty)			Actions ▼
English Proficiency Form (for Faculty)			Actions ▼
Employment Verification Form			Actions ▼
Background Inquiry Release Form			Actions ▼
Additional Document			Actions ▼
Director Approval Memo (If applicable)			Actions ▼
Recommendation Letter #1			Actions ▼
Recommendation Letter #2			Actions ▼
Recommendation Letter #3			Actions ▼
Interview Questions for Staff Positions			Actions ▼
Faculty Start Up Approval			Actions ▼
Authorization for Employee Moving Expenses (Form AP-16)			Actions ▼

Attach documents, by selecting the Action link, and Upload New.

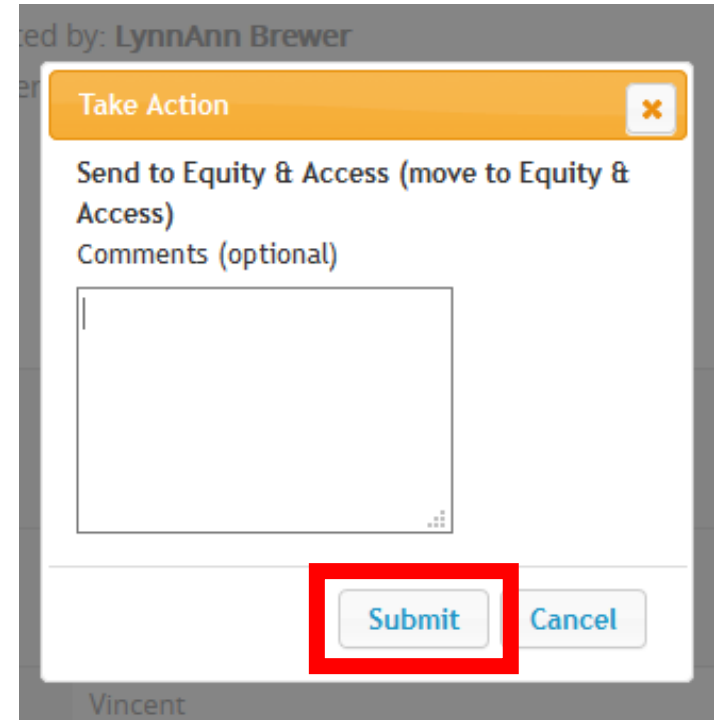
- In Staff Hiring Proposals the required documents are *Hiring Matrix, 2 Employment Verification Form, and the Background Inquiry Release Form.*

Then select Next.

Select the orange button Take Action On Rec for Hire and select Equity and Inclusion.



Enter a comment if needed and select the button Submit



The applicant review, request to hire, and Staff Hiring Proposal is all done! Congratulations and great job.

- Equity and Inclusion will notify the Hiring Manager if there are questions about the selection, the applicant log, and the hiring matrix.
- Talent Acquisition will process the background check and notify the department when the hiring manager can move forward with to offer employment.

Helpful tips: In the History of the Hiring Proposal, Hiring Managers may view the history of the proposal's workflow, notes from approvers, and copies of email notification, including the email stating the criminal history check, is complete and the hiring manager may make an offer.

Accessing the approval:



Summary | History | Settings | Reports

Workflow | Notes | Emails

Email Sent January 08, 2020 at 04:31 PM
 "Background Check Completed " sent to 1 user

Emails Sent January 08, 2020 at 04:31 PM
 "Background Check Completed " sent to 2 users

Email Sent January 08, 2020 at 04:31 PM
 "Hiring Proposal Status Update " sent to 3 users

Email Sent January 08, 2020 at 04:31 PM
 "Hiring Proposal Status Update " sent to 1 user

Performed "Override" Leah Brown (HR Employment) January 08, 2020 at 04:31 PM
 Position Request status changed to "HR Employment - Offer Pending". It has been in this state for 5 full days.

background check completed 1/8/2020

Home		Postings ▾
☆		
Addressee	Actions	
C_B115@txstate.edu	📄	
ISO4@txstate.edu	📄	

Hello,

The criminal history background check for the candidate has been completed and you can move forward with the employment offer. Per policy [04.04.15](#), newly hired benefits eligible staff must always start on a Monday and attend NEW, otherwise VP approval must be given for an out of cycle hire. Please let me know if the candidate accepts along with the official start date so I can complete the workflow in PeopleAdmin and release the Net ID.

Thank you,

Talent Acquisition Team

Next Steps

- The hiring department must wait for HR's final approval before making the official offer, in the meantime, the hiring manager can send the candidate a Recommended for Hire letter to let them know where they stand in the process. (See sample employment letters for applicant notifications.)
- PeopleAdmin sends an email to the hiring manager to notify them that they can extend the official offer of employment with the subject line, Background Check Completed from hr@txstate.edu. See the instructions above to view the copy of the email.
- Questions about requesting and publishing a job posting may be sent into hr@txstate.edu. A Talent Acquisition staff will respond.

Helpful tip: If the hiring manager sees the Current Status of the Staff Hiring Proposal at the status HR Employment – Offer Pending; this means the Hiring Manager may make the employment offer.

Staff / ... / Regular Staff Hiring Proposal / Summary / History

Take Action On Rec For Hire ▾

- Print Preview
- Add to Watch List
- ★ Order HireRight Background Check

Regular Staff Hiring Proposal: Andrew Thyng (Staff) Edit

Current Status: HR Employment – Offer Pending

Position Type: Staff	Created by: Stacy Evens
Department: Mobile/Web Systems (50006626)	Owner: HR Employment
Applicant: Andrew Thyng	
Posting: Sr Programmer Analyst	

- The department responds to HR whether the offer was accepted and the new employee's official start date
- Hiring Manager reviews the [Hiring Manager Checklist](#) and completes the I-9, PCR and registers the employee for N.E.W.
- Register employees for N.E.W. by using the [N.E.W. Administration Registration Form](#)

For assistance please contact the Office of Human Resources at 5.2557 or email hr@txstate.edu.

