Career Center Hiring User Guide

SuccessFactors Recruiting Platform

TEXAS
Health and Human Services

Table of Contents

Abbreviation List

- Job Posting – JP
- Job Requisition – JR

1. How To Use This Guide?

The purpose of this guide is to support Hiring Managers during the recruiting process and through the testing phase.

This guide has been created to help in your daily business process as a Hiring Manager within the State of Texas. After the initial chapters focusing on general information and navigation around the SuccessFactors Recruiting Platform, the main focus of this document will be in the **Recruiting** section of the Platform, covering the following aspects:

- How to navigate through the system
- How to create and approve Job Requisitions
- How to update Job Requisition Forms
- Different types of candidates and candidate applications
- Explanation of various application statuses in the system
- How to move candidates through various application statuses
- Screening and Interview Planning (pending State of Texas approval, not up to date)
- How to prepare and extend offers

This guide is broken up into chapters. For better understanding, letters and numbers will be used in images to provide a structured step-by-step approach to cover the relevant topics.

2. Introduction Career Center Recruiting Platform

The SuccessFactors Recruiting Platform is the new State of Texas' recruiting system referred to as the Career Center. Using SAPs market leading solution, SuccessFactors provides a high quality, digital employee/candidate experience and access to *Best Practice* HR processes for recruiters and candidates. The system is accessed through the internet, therefore users are not location-dependent when using it.

3. Main Role of the Process

Hiring Manager – The Hiring Manager is the main process owner of the Job Requisitions/Postings function in the **Recruiting** process. Hiring Managers are involved in all stages of the application process, conducting administrative tasks and collaborating with other recruiting roles at certain stages.

4. Other Recruiting Roles

- **HR Professional** – HR Professionals have the **highest level of permissions** in the system. This role has extended permissions compared to Hiring Managers. They can **access all the JPs** and can update candidates in the talent pipeline after the JPs are fully approved and posted. HR Professionals function as high level operators for system support, if other users face errors or require assistance.
- **Non-HR Recruit** – Agency specific (HHSC, DSHS, DFPS) role with the same system permissions as a Hiring Manager. Supports Hiring Managers with Job Requisitions and can access **all** Job Requisitions of a specific agency.
- **Recruitment Partner** – Recruiting Partners support Hiring Managers with the **screening** and **interviewing** of candidates, with **view access** to Job Requisitions they are assigned to.

Background Information

The list below are people who serve a part in the recruiting process.

- **Staffing Coordinator** – Staffing Coordinators function as the final reviewer and approver of pending Job Requisitions. Their focus is on recruiting related administrative tasks.
- **Delegate** – Designated by Hiring Managers and approved by the Recruiting team. The role is not transferred from the PeopleSoft file and must be set manually. A *Delegate* can use the *Proxy Now* button to act on behalf of the Hiring Manager (further information: SuccessFactors Roles Definition Document User Guide).

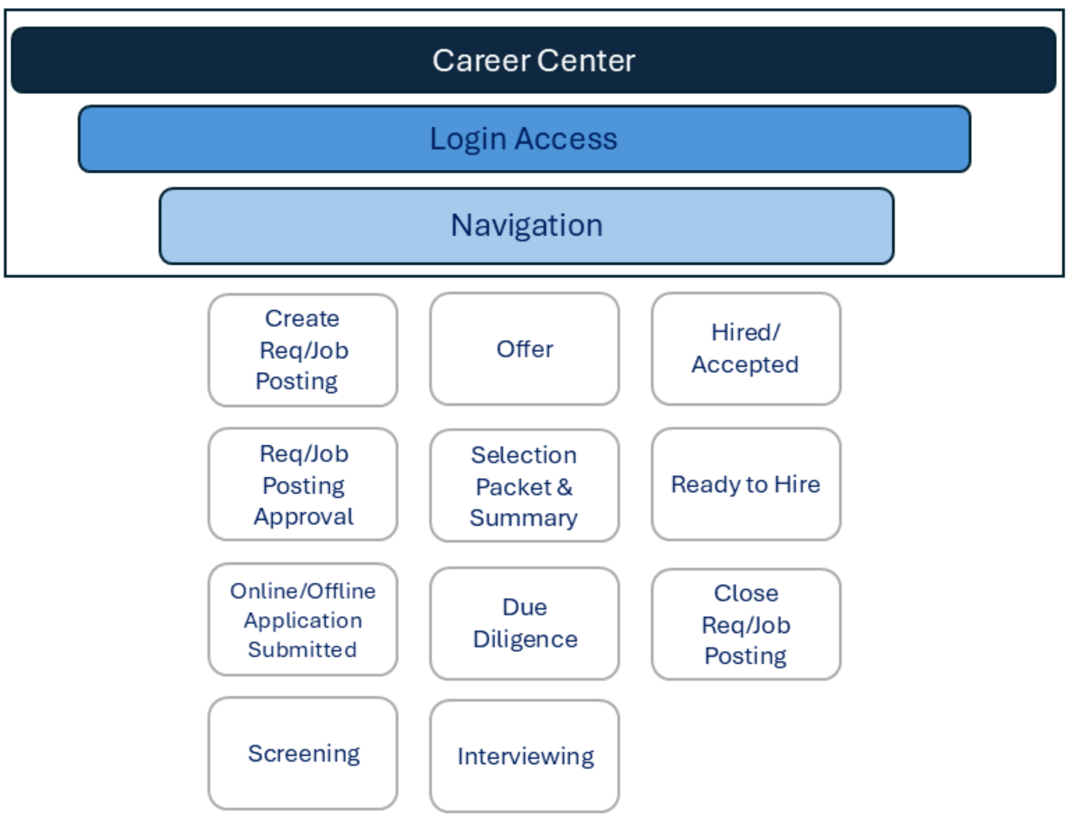
Note: All employees have access to the new recruiting platform, including regular employees.

- **Regular Employee** – Employees with limited system features with only access to system sections *Careers*.

5. Process Flow

The Process Flow is described below:

1. Career Center
2. Login access
3. Navigation
4. Create Req/Job Posting
5. Req/Job Posting Approval
6. Online Application Submitted / Offline Application Submitted
7. Screening
8. Interviewing
9. Due Diligence
10. Selection Packet & Summary
11. Offer
12. Hired/Accepted
13. Ready to Hire
14. Close Req/Job Posting



6. Log into the Career Center

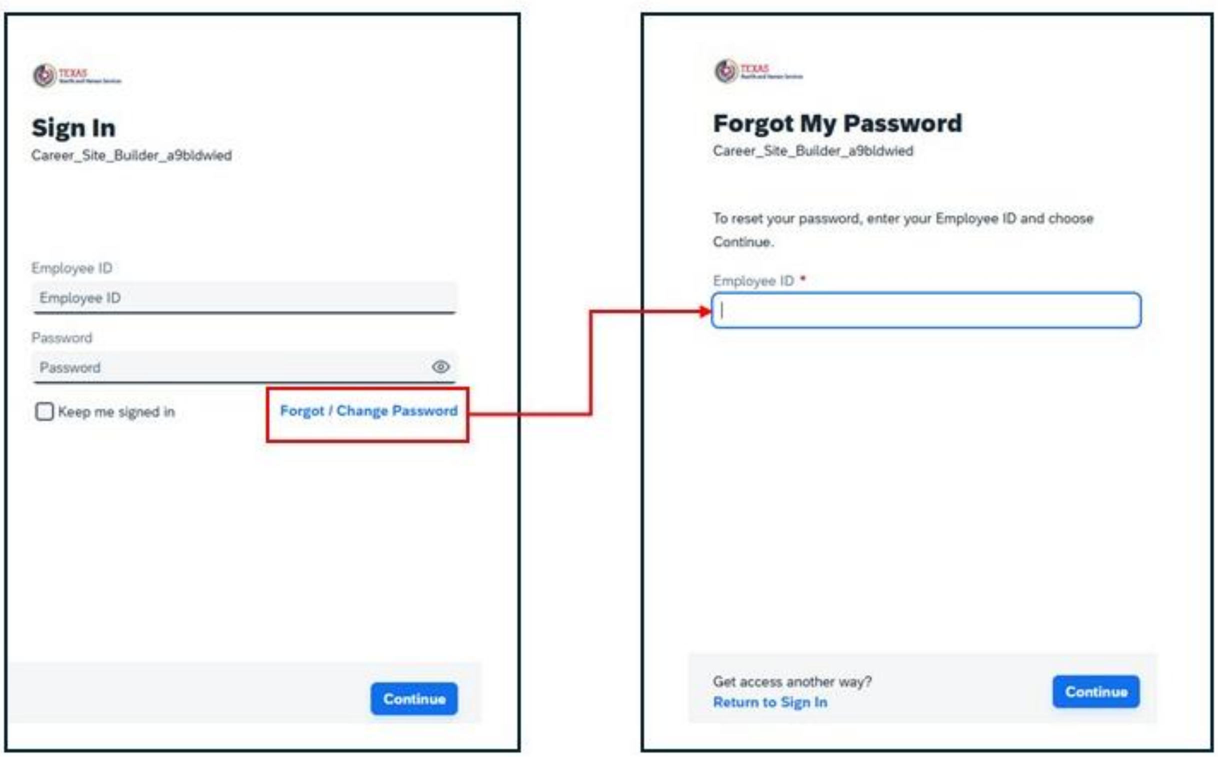
This section describes how to log into the Career Center.

Each SuccessFactors Recruiting Platform user is assigned a username and password. Additionally, State of Texas has an URL and Company ID assigned.

1. Open [Career Center URL](). For quick access later, save the URL as a favorite.

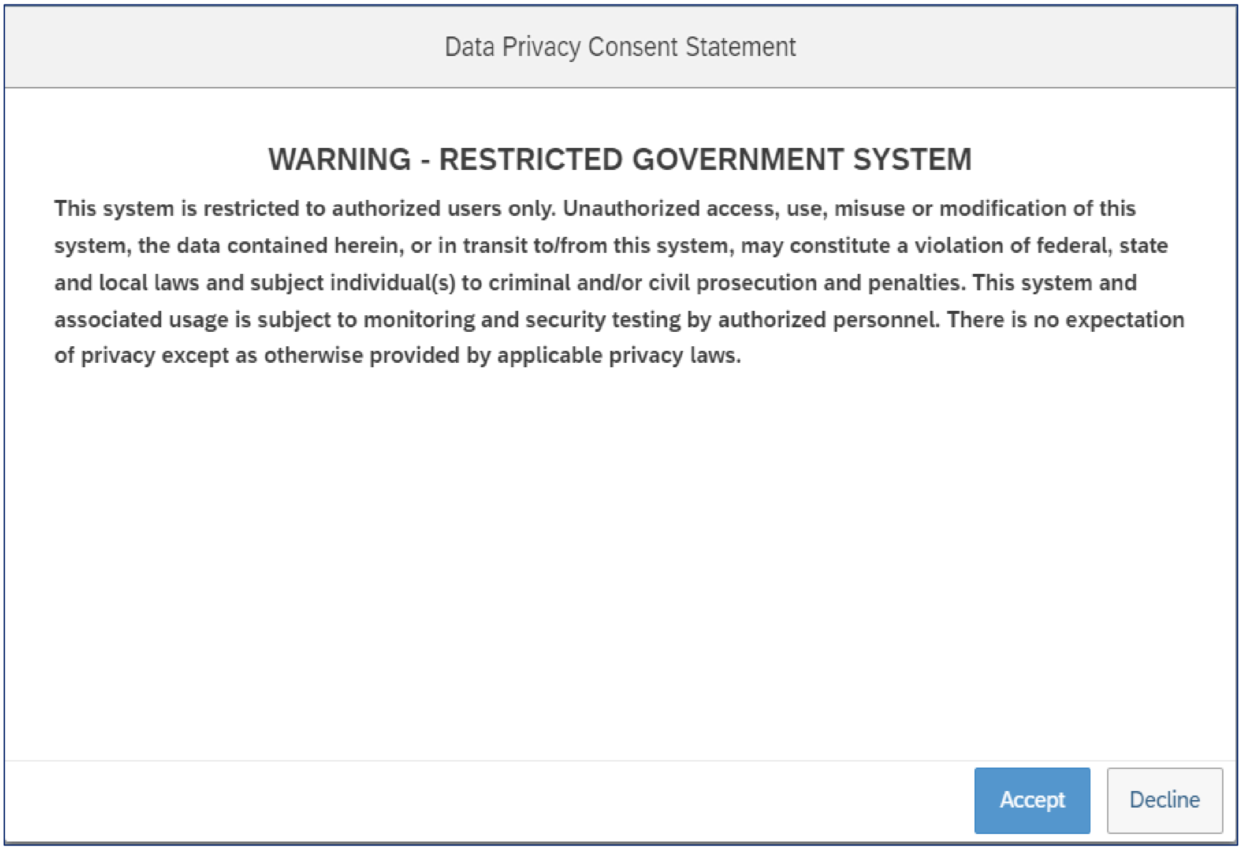
Once the Login page is opened, you can log into the Career Center:

1. Enter your username. You will use your CAPPS Employee ID#.
2. Enter your password.
3. Select *Continue*.
4. If you have forgotten your password or want to change it, select the *Forgot/Change Password* link below the password text field to reset your password. On the next screen, Forgot My Password, enter your Employee ID# and select the *Continue* button and you will receive a password reset email.



7. Navigation in the SuccessFactors Recruiting Platform

The first-time logging into SuccessFactors, the Hiring Manager will need to review and accept/decline the Data Privacy Consent Statement (DPCS).



Once accepted, the Hiring Manager will be redirected to the Home Page and will not need to accept the DPCS again when accessing the system the next time.

7.1 Home Page: Basic Navigation

The Home Page is the default start page of the SuccessFactors platform. For employees, the Home Page is the main entry point to the platform and generally the first page you see after logging in. It shows useful information like approval highlights, pending tasks to complete, recent.

A. **Company Logo**: State of Texas Logo. It will be always visible on the top left of the system screen, redirecting the logged in user back to the home page.

B. **Navigation Menu**: This is the main menu to access the sections of the system, mainly for *Careers* and *Recruiting*. It will be always visible on the top left of the system screen, after the logo.

C. **Actions/People Search**: This is a search function, which is always accessible on the screen. Click on the search button (a magnifying glass icon) to find employees by their employee IDs or names. When you begin to enter text, you'll start to see applicable results. Additionally, users with extended system permissions can search for actions (e.g. to directly navigate to the recruiting section or parts of the recruiting section) or section specific commands. The Search for actions or people text field can be expanded or collapsed by using the Search button. This feature remains constant as you navigate through the portal.

D. **To-Do Alerts and Notifications**: Quick access for open To-Do items and system Notifications. Same as for the Actions Search bar, these buttons will be visible on all the pages when navigating through the system. They help you manage your day and prioritize what to focus on.

E. **Profile Menu**: Shows the name of the logged in user and options for system *Settings*, viewable system *version information* and the *Log Out* feature.

F. **Banner**: Appears with the Career Center logo. It is the start of the main content area of the page.

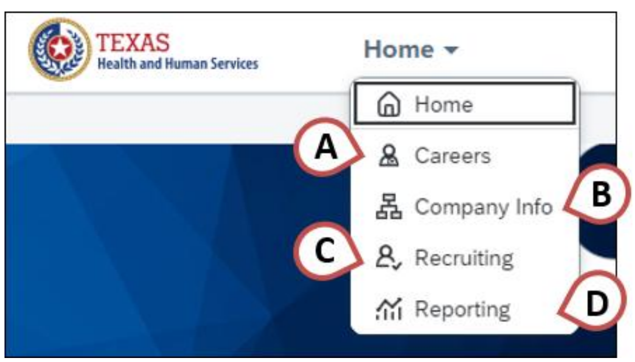
G. **Quick Actions**: Designed to promote efficient actions for the most common use cases.

H. **Approvals**: Requests around Job Requisitions appear here to be reviewed, approved or declined by the manager. Pending Approvals appear as To-Do tasks.

I. **Resources**: Shows five buttons (HHSC & DSHS Due Diligence Workbook, Posting Templates, DFPS Due Diligence Workbook, User Guides, and Assistive Technology User Guides) that store additional resources that can be downloaded.

7.1.1 Navigation Menu

The *Navigation Menu* will help to navigate through different sections of the recruiting platform.



A. **Careers**: Internal candidates will use the *Careers* section to search for and apply to positions after being redirected to the *Internal Career Center*.

B. **Company Info**: Redirects to the company *Org Chart*.

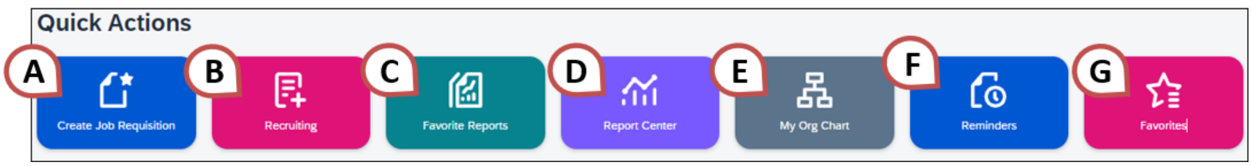
C. **Recruiting**: Hiring Managers will use the *Recruiting* section which provides a central location to create and store Job Requisitions and manage recruiting processes.

D. **Reporting**: Redirects to the *Report Center*.

To return back to the home page, select the *Home* button.

7.1.2 Quick Actions

The Quick Actions section enables users to complete the most frequent or important actions. It's in the main content area, after the Career Center logo, and is designed to promote efficient, focused action for the most common use cases.



Quick Actions are visible on the home page and the following quick actions are available:

A. **Create Job Requisition**: Redirects to the *Create Job Requisition* tab of *Company Info.*

B. **Recruiting**: Redirects to the *Recruiting* section (further information: 8. Recruiting Management).

C. **Favorite reports**: Enables users to build favorite reports that are automatically populated with the most up-to-date information with each login.

D. **Report Center**: Redirects to the *Report Center*.

E. **My Org Chart**: Redirects to the company *Org Chart.*

F. **Reminders**: Approval cards that were temporarily pushed to the next day. Reminders reappear on the Home Page 24 hours after their setup.

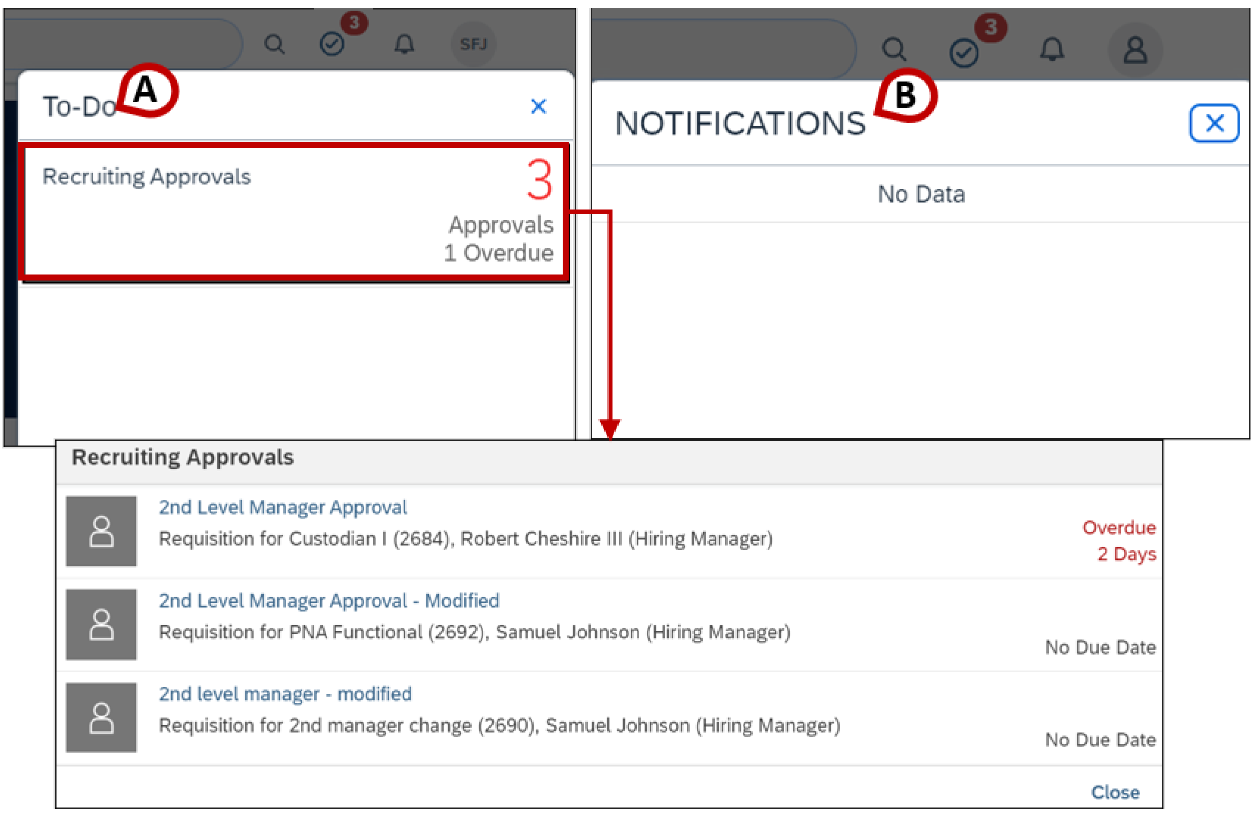
G. **Favorites**: Enables users to save quick links for frequently used parts/actions in the system. The system provides a default list of available links. Users can choose which ones to mark as their personal favorites for quick-access.

7.1.3 To-Do Items and Notifications

On the top right of the screen, the To-Do items button (a check mark icon) is visible. The button shows the number of pending To-Do's. Next to it, there is a button to view new, user-specific notifications.

A. **To-Do Items**: Example of the To-Do Items dialog box expanded with three pending *Approvals* with one overdue.

B. **Notifications**: System notifications regarding the own profile or managed employees will be displayed here.



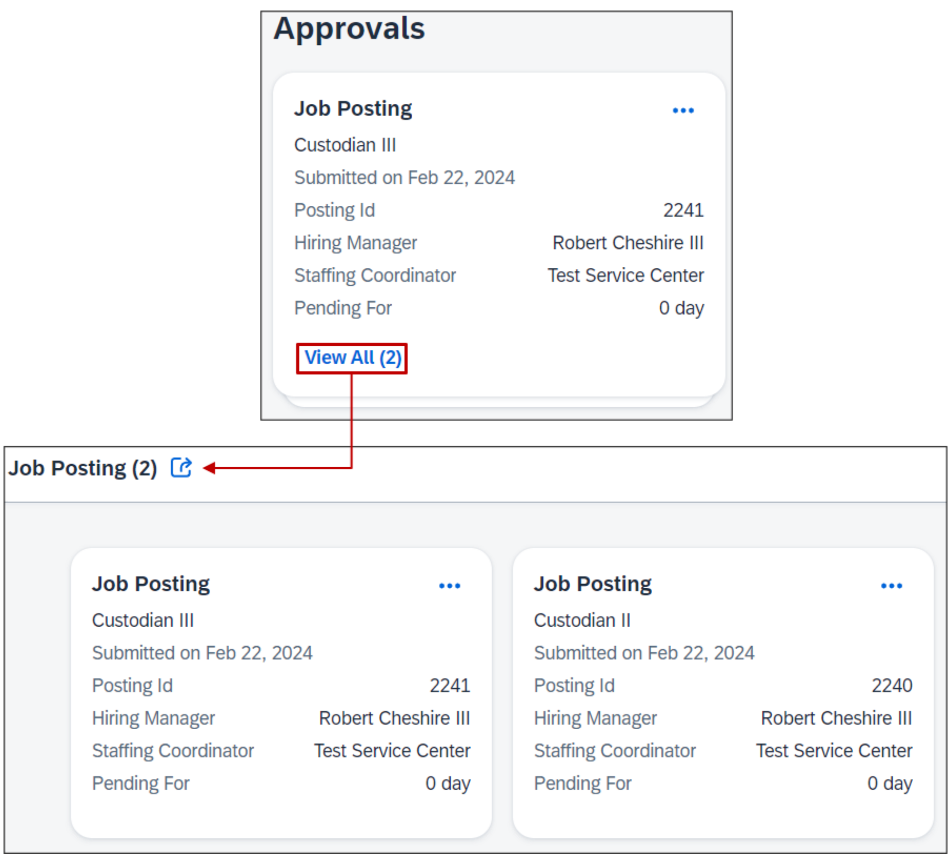
> **Note:** These buttons will be visible on any page in the system as the upper frame is locked and always available throughout the system.

7.1.4 Approvals

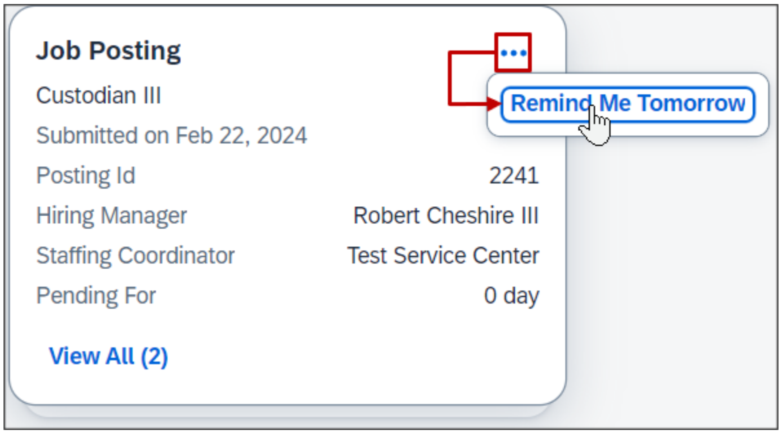
> **Note:** If the logged in user is a **Hiring Manager** or has any other role (refer job aid document SuccessFactors Roles Definition Document) that is involved in the recruiting process, the *Approvals* section on the home page shows changes or requests that require the user to review, approve or decline.

Approvals are *To-Do tasks* and appear on the To-Do panel. These show up as individual tasks with links. When a task gets completed, it disappears from both places.

Approvals can be accepted or declined by selecting the link. The system will then redirect to the respective page of content to approve or decline (further information: 8.4 Approving a Job Posting). Multiple pending approvals require the Hiring Manager to access another page by selecting *View All* and review all pending items. Most approval processes will optionally allow or require approvers to add comments before approving/declining.



There is the option *Remind Me Tomorrow* to dismiss a card for 24 hours by selecting the **More Actions Job Posting** button (three dots on the top right of an approval card).

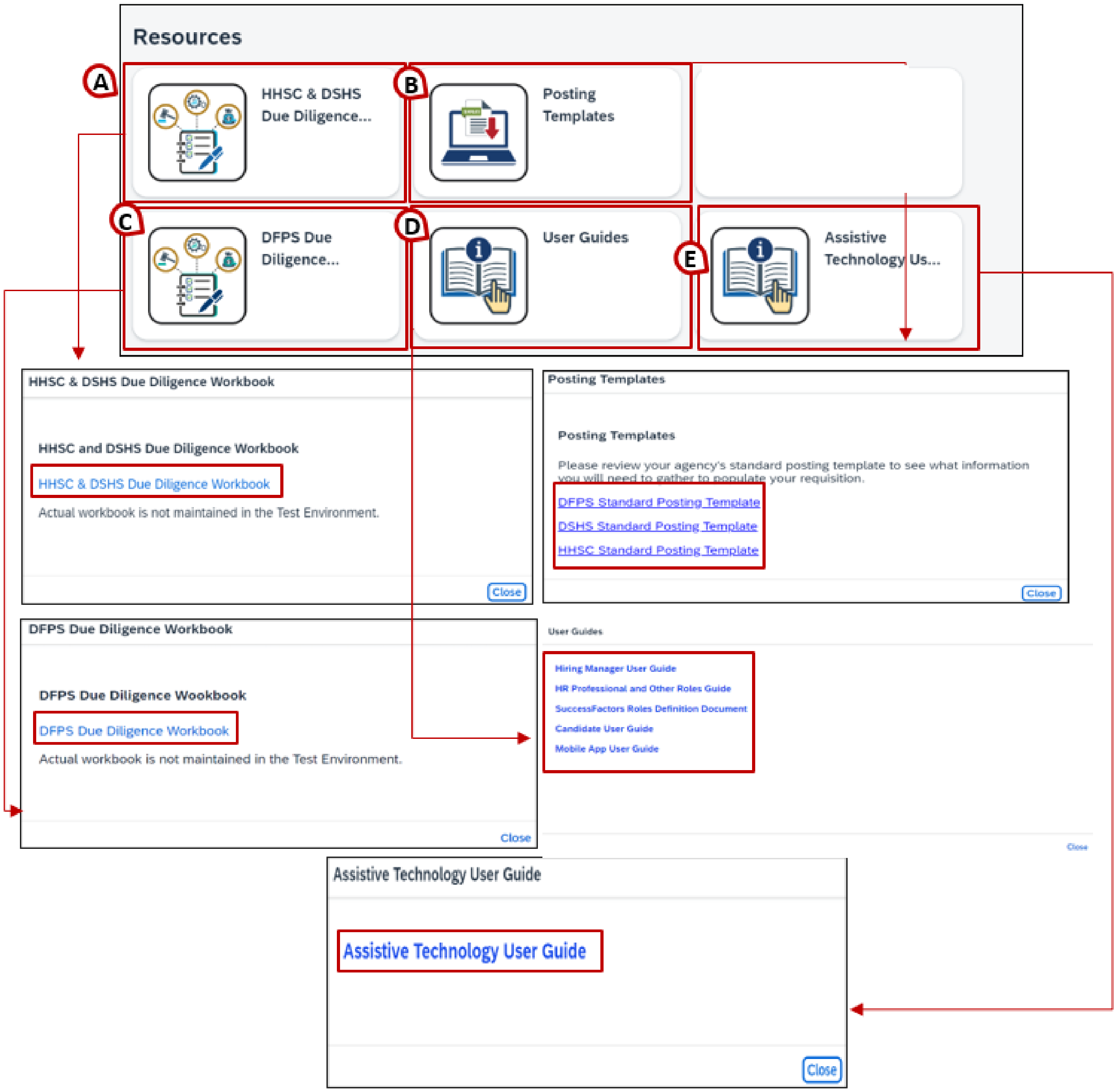


Two examples for pending Approvals:

- **Job Offer**: Prompts the Hiring Manager to review and approve a pending *Job Offer*. Links the Manager to the details of the offer to review and decide whether to approve/decline it.
  - Appears when there is a pending *Job Offer* that the Hiring Manager needs to approve.
  - Disappears after the offer was approved or declined. If no action is taken, it disappears 180 days or after the due date (if set) or the Last Modified date (if there's no due date).
- **Job Posting**: Prompts you to review and approve a pending JP. Links you to details so that you can review the requisition and then decide whether to approve or decline it.
  - Appears when you have a JP to approve-- that is, when you've been added as an approver and it's sent for approval.
  - Disappears when you accept or decline the requisition. This step moves it to a different step in the workflow. If no action is taken, it disappears 180 days or after the *due date* (if set) or the *Last Modified date* (if there's no due date).

7.1.5 Resources

Resources is a new section on the home page, providing guideline documents for due diligence, posting templates and job aids.



A. **HHSC & DSHS Due Diligence Workbook**: Stores additional resources regarding Due Diligence. Clicking on the link (HHSC & DSHS Due Diligence Workbook) will automatically download the *Excel* workbook.

B. **Posting Templates**: In this section you will find three different templates, one for each agency of State of Texas. Review your agency's standard posting template to see what information you need to gather to fill your requisition. Clicking on the link will automatically download the Word document.

C. **DFPS Due Diligence Workbook**: Stores additional resource regarding Due Diligence for DFPS agency. Clicking on the link will automatically download the *Excel* workbook.

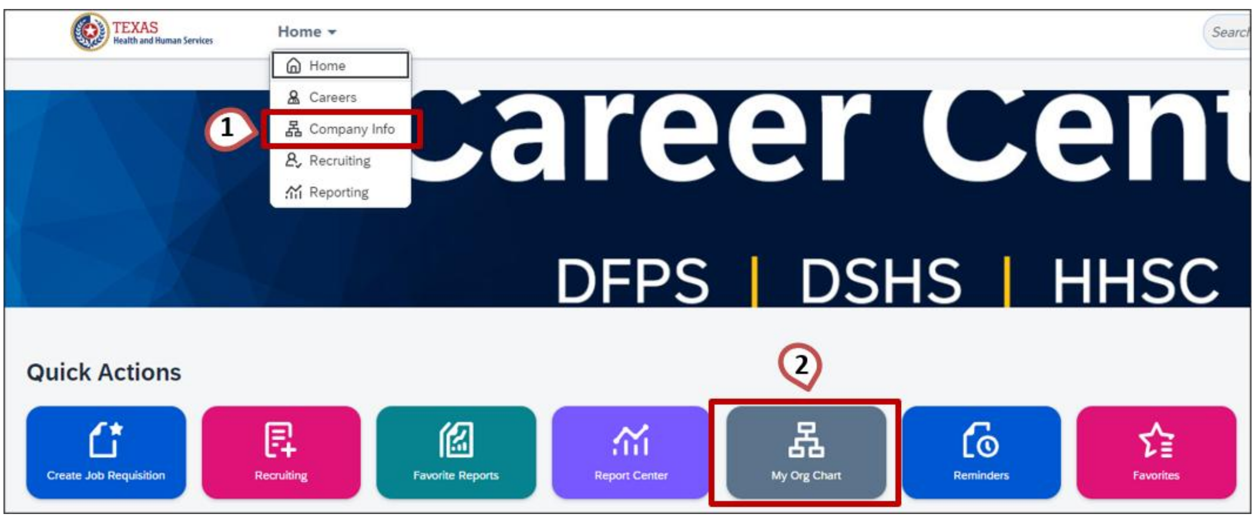
D. **User Guides**: This button stores *Job Aid Documents* for further information about navigating through the system with different user roles like Hiring Manager, HR Professional, etc. Clicking on the link will automatically download the *Excel* workbook.

E. **Assistive Technology User Guide**: Stores the Assistive Technology User Guide.

7.2 Company Org Chart

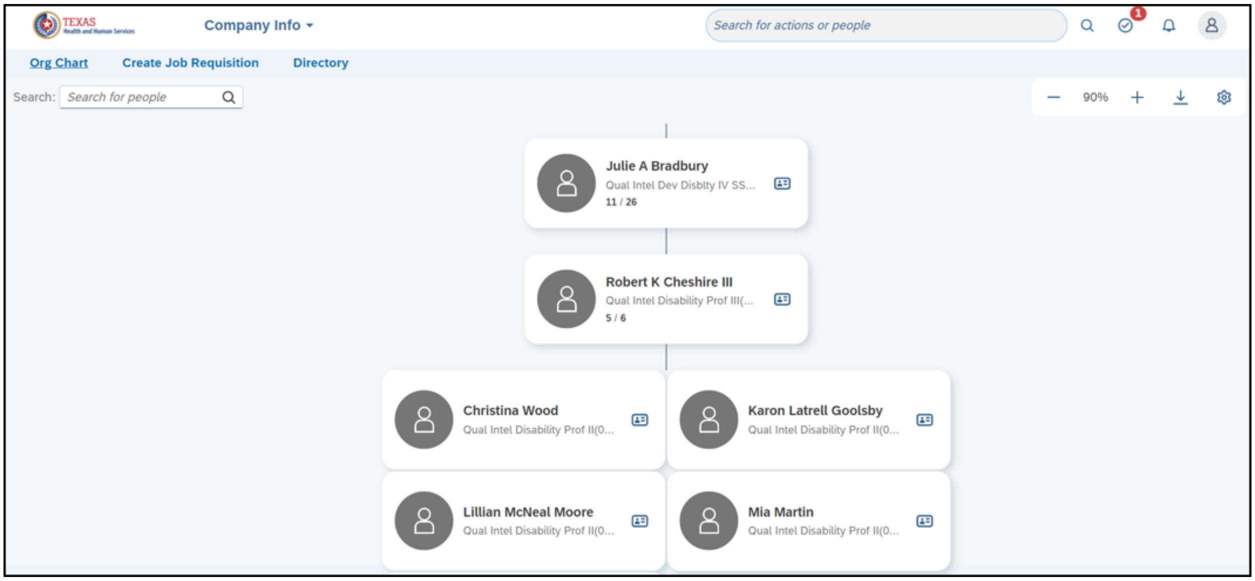
The State of Texas' *Org Chart* can be accessed from the home page in two ways:

1. Open the Navigation Menu and select *Company Info* or
2. Select the Quick Actions *My Org Chart*.



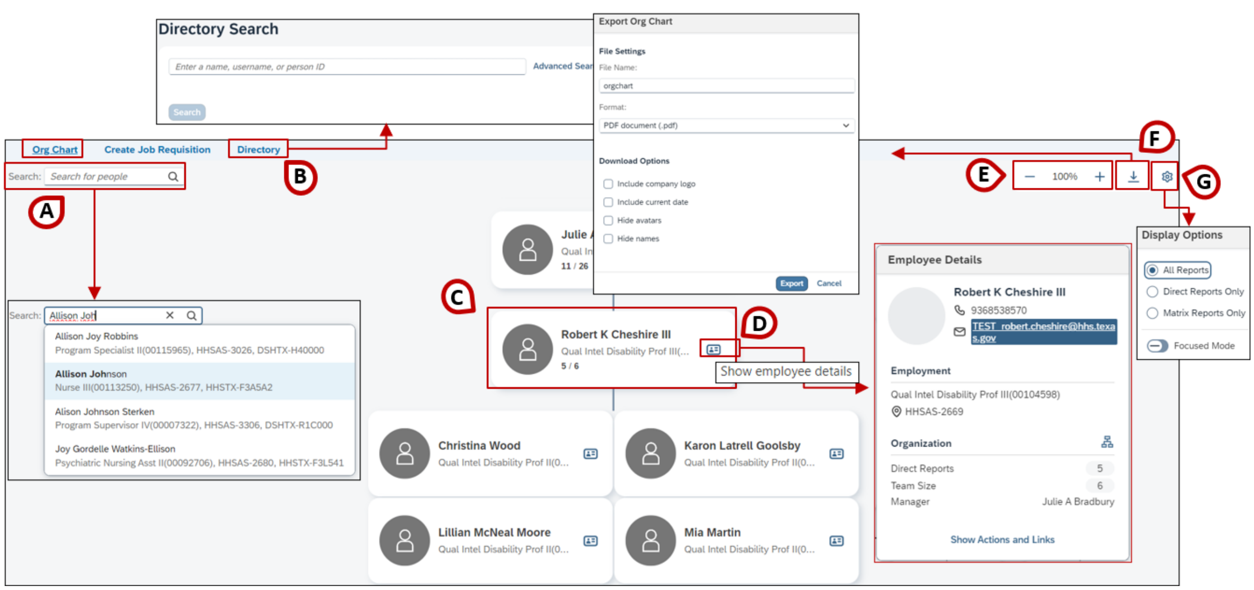
You can then browse the organizational hierarchy (*Org Chart*) to understand the department structure and reporting relationships. Find people in the organization and discover more about them using the *Employee Quick Card* or *Directory* tab. Hiring Managers can also view information about an employees' position, managers and other relationships in the organization, either direct or matrix.

7.2.1 Company Org Chart Navigation



Use the new *Org Chart* design to streamline your organization insight.

> **Note:** The full reporting line of the searched employees will be shown right away. You can only navigate to the top and bottom of the chart by holding your left mouse key and dragging the mouse. Scrolling via the mouse wheel only zooms in and out of the org chart.



A. **Search Org Chart**: Allows to search and view an individual of the company on the chart.

B. **Directory**: General tool to search people of the organization by name, username, person ID or other advanced search criteria.

C. **Employee Quick Card**: Displays the name and position name and ID. If there are numbers after that information, the respective employee is in a manager position. The first number is the number of direct reports and the second number is the total number of direct reports. By clicking on this information, you can expand and collapse the display of the direct reports in the chart (the image above shows an expanded chart).

D. **Show Employee Details Button**: Opens the Public Profile of an employee.

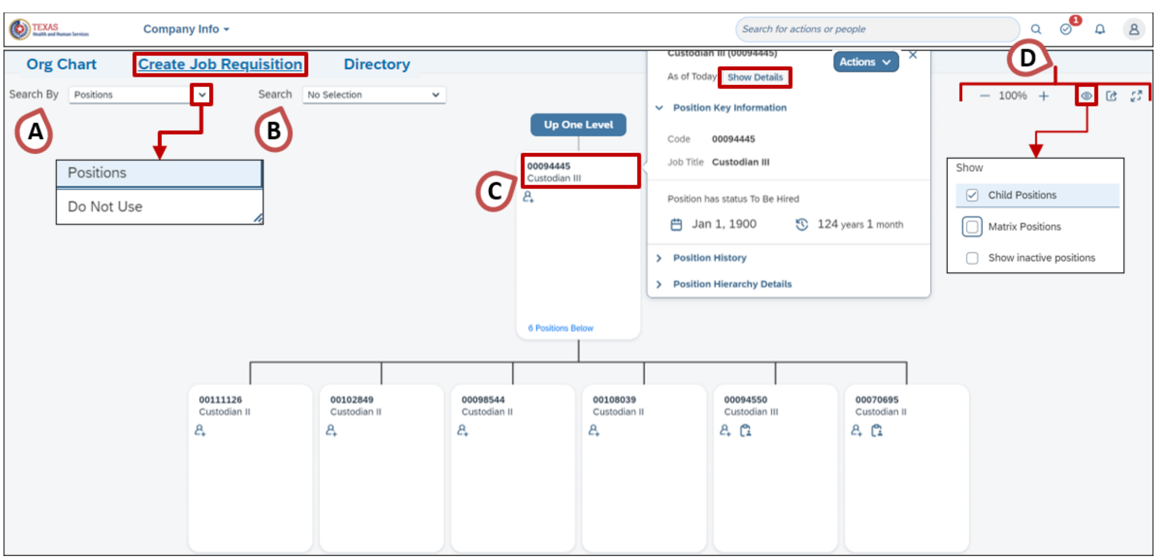
E. **Zoom tools**: Option to change the *Org Chart* size in percent by selecting the Zoom Out button (a minus sign) or Zoom In button (a plus sign).

F. **Export Options**: Option to export the chart in document or picture format with additional download options to include or hide certain aspects like names, avatars, the company logo and the current date in the export.

G. **Display Options**: Option to display All Reports, Direct Reports Only or Matrix Reports Only in the *Org Chart*.

7.2.2 Create Job Requisition Navigation

The Position Org Chart allows Hiring Managers to view a graphical representation of positions in the organization, who occupies the positions and how they relate to other positions, whether those are higher-level positions, lower-level positions or peer positions.



A. **Search By**: Drop-down menu with options to find a position based on *position* names or codes. The second option labelled as *Do Not Use* is searching for a position by employee name. Please only use the *Positions* option when trying to create a job requisition.

B. **Search**: Based on the previous selection for *Search By*, this is a drop-down menu used to search by positions or employee name.

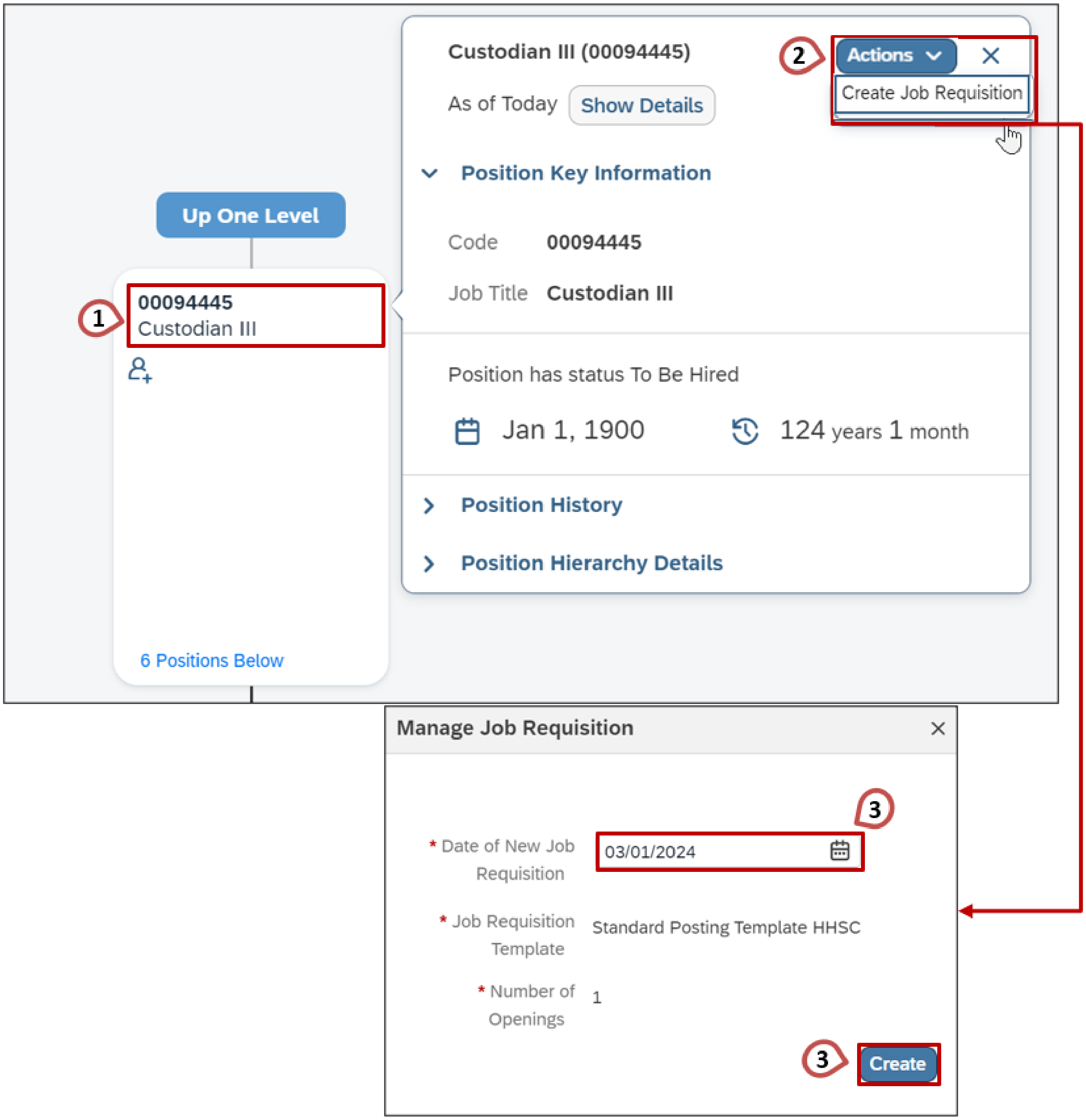
C. **Position Card**: Has Position Number, Job Title, and To be hired button. Position information will be displayed when you click on the Position Number or Job Title in a window that pops-up. With that window popped up, click on the *Show Details* button for all details about the position.

D. **Display Options**: Options to change the *Org Chart* size by selecting the Zoom Out or Zoom In buttons. Select *Display Options* button to filter the chart by the position type (*Child Positions, Matrix Positions, Show inactive positions*). The *Export* button can be used to save a copy of the chart, either as a PDF or an image file. *Hide top navigation* button will collapse the navigation bar, only displaying the Org Chart on the page.

7.3 Creating a Job Requisition

To create a JR, navigate to the *Create Job Requisition* tab of the *Company Info* section. Then,

1. Click on the *Position card* (specifically the Position Number and Job Title text) you want to create a requisition of.
2. A window pops-up. Click *Actions* and then *Create Job Requisition*.
3. Another window pops-up. Choose an effective start date for the requisition and select *Create*.


Custodian III (00094445)
Actions
Create Job Requisition
As of Today
Show Details
Position Key Information
Code 00094445
Job Title Custodian III
Up One Level
00094445
Custodian III
Position has status To Be Hired
Jan 1, 1900
124 years 1 month
Position History
Position Hierarchy Details
6 Positions Below
Manage Job Requisition
* Date of New Job Requisition
03/01/2024
* Job Requisition Template
Standard Posting Template HHSC
* Number of Openings
1
Create
1
2
3
3

8. Recruiting Management

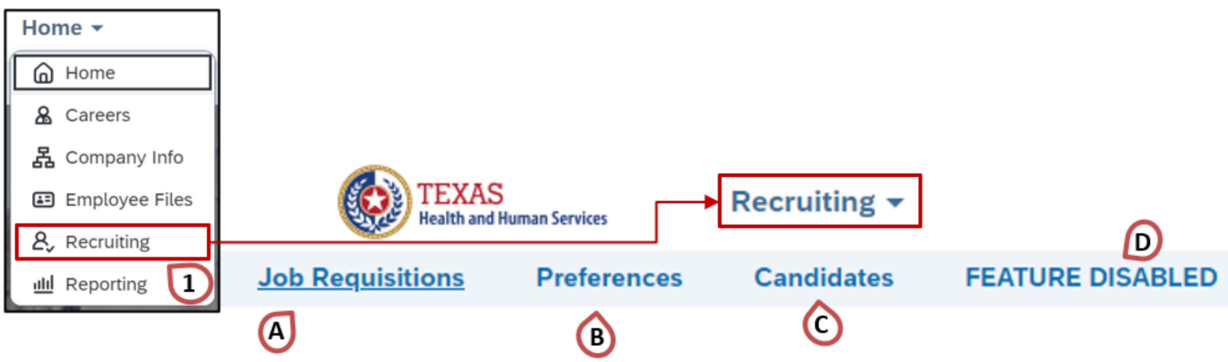
This section will walk you through the ***Recruiting*** section of the platform.

SuccessFactors *Recruiting* will:

- Provide a multi-channel approach that gets jobs in front of the right candidates.
- Initiate relationships and maintain contact with candidates.
- Facilitate a strategic recruiting process for your business's needs.

8.1 Recruiting module Navigation

1. Select *Recruiting* in the navigation menu.



The Recruiting page lands on one of the tabs (**A** – **C**).

A. Job Requisitions: Overview of *Job Requisitions* the respective Manager has access to.

B. Preferences: Storage for *saved* pre-screening *questions* for candidates, *saved rating scales* and *display preferences*.

C. Candidates: Tab to search for internal and external candidates by key words, background information and other criteria.

D. **FEATURE DISABLED**: No longer supported/utilized feature which cannot be made invisible in the system, therefore the tab was relabeled.

All tabs except **FEATURE DISABLED** will be explained further in the next chapters.

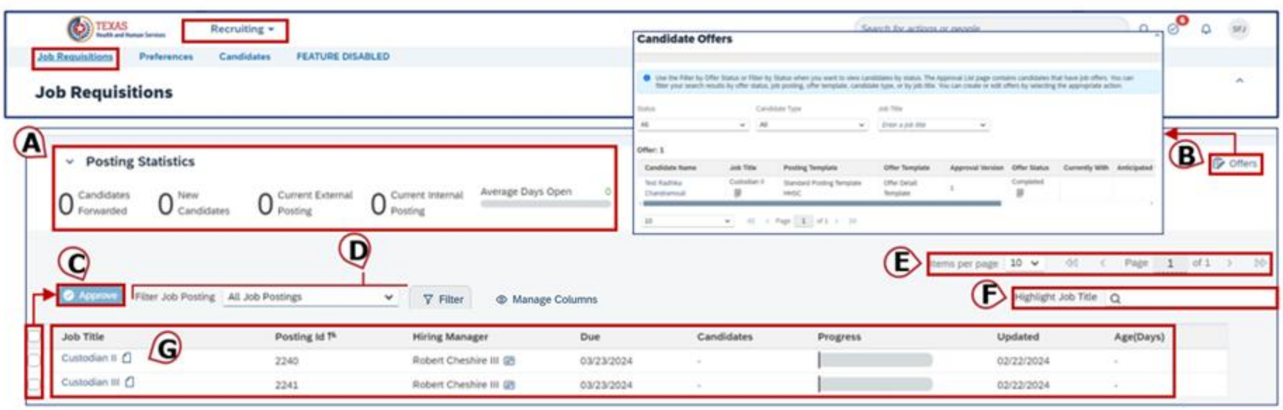
> Note: Only the HR Professional role will have access to the Candidates functionality.

8.1.1 Job Requisitions

By default, and if not changed in the personal settings, the *Job Requisitions* tab will be shown when accessing *Recruiting*.

All JRs that the logged-in Hiring Manager has ownership of will display on this page (requisitions with pending approvals as well as already approved/open postings).

> **Note:** Job Requisitions (JRs) are called Job Postings (JPs) as soon as they are fully approved and published/posted. *Job Requisition* is used to internally label the pre-published forms.



A. **Posting Statistics**: Information about JPs: number of candidates forwarded, number of new candidates, number of current external and number of internal postings. Average Days Open shows the average days a job posting is in Open status.

B. **Offers link**: Option to search for existing *Offers* that were offered to *Candidates*.

C. **Approve button**: Postings which are in pending approval state can be approved by selecting the *checkbox* for the corresponding job titles in the table and use the *Approve* button. This way, multiple pending Job Requisition approvals can be finalized at once.

D. [Filter/Manage Columns](#): Select and set different filter and manage columns options as preferred to display a better overview of the JRs.

E. **Items per page**: Option to adjust how many JRs are shown on the overview page at once.

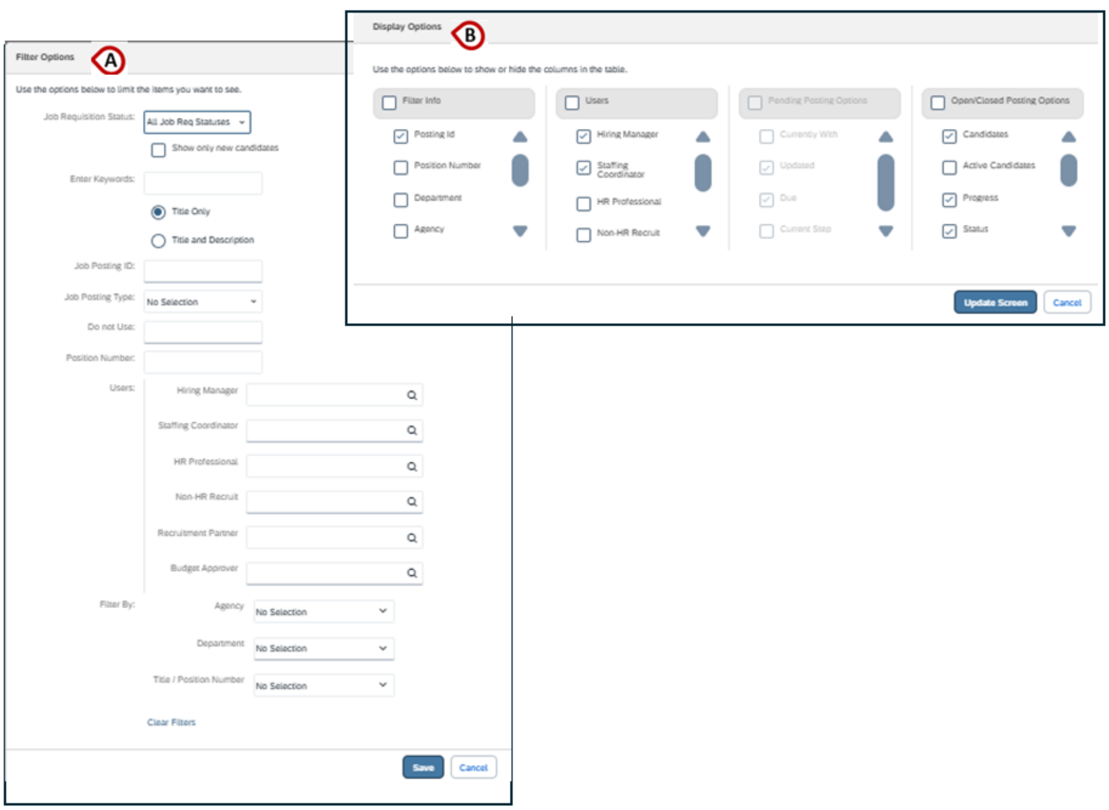
F. **Highlight Job Title**: Listed job titles can be highlighted in yellow by entering the title in this search bar and find them easier on the page. This is a time-saving feature if there is a high amount of listed JRs.

G. **Job Postings**: *JPs* are listed with the internal *Job Title* along with the system assigned *Posting ID*. The table columns show details for postings such as *Hiring Manager*, *Due* date, number of *Candidates* that applied, *Progress* in the recruiting process etc.

Filter and Manage Columns (D)

A. *Filter* contains criteria which can be utilized to show only specific postings. Select *Save* after selecting or entering filter options to apply the filter.

B. *Manage Columns* allows you to select individual preferred columns on the table to be visible. Select *Update Screen* after choosing your column preferences.



8.1.2 Preferences

Within the *Preferences* tab of the *Recruiting* section, Hiring Managers can navigate through different sub-tabs: *My Saved Questions, My Saved Rating Scales*, *FEATURE DISABLED* and *My Display Preferences*.

My Saved Questions

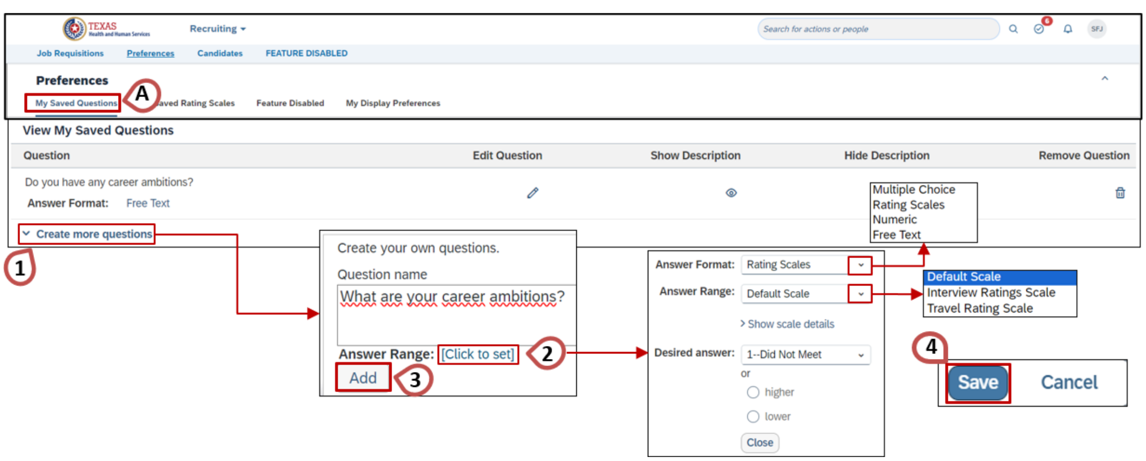
Assessment Questions are **not** part of the default global Question Library.

A. Go to the **My Saved Questions** sub-tab.

1. Questions can be created. Click on the **Create more questions** collapsible/expandable region. Type in a question.
2. Define **Answer Range.** Click on the **Clicket to Set** button. A new window pops up. There is an **Answer Format** drop-down menu with options: Multiple Choice, Rating Scales, Numeric and Free Text. There is also an **Answer Range** drop-down menu with options: Default Scale, Interview Ratings Scale and Travel Rating Scale. Click on the **Close** button.

> **Note:** The free text type of question will default to 200 characters if not edited.

3. Click on the **Add** button to add the question.
4. Click on the **Save** button. These questions are only visible/editable for the **person who created** and **saved** them.

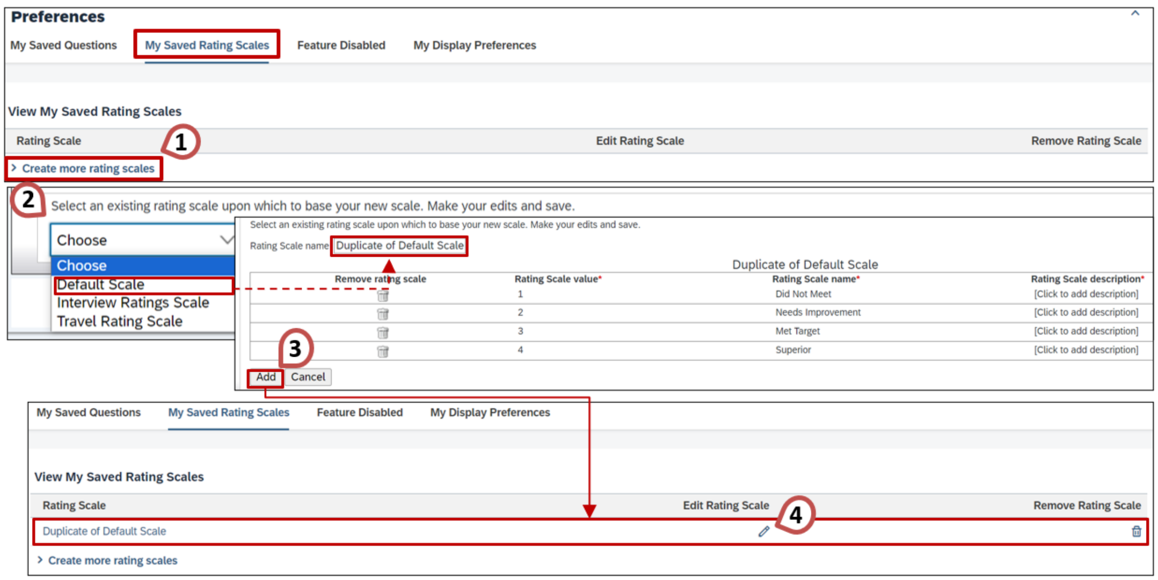


My Saved Rating Scales

Go to the **My Saved Rating Scales** sub-tab. Hiring Managers can create personal rating scales to use in job applications and evaluate candidates during and/or after an interview.

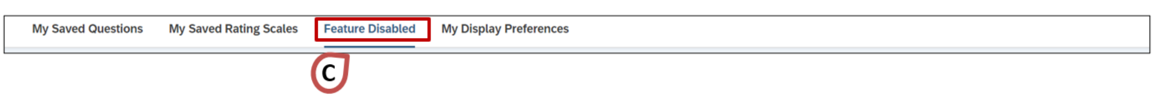
1. Click on the **Create more rating scales** collapsible/expandable region.
2. When the region is expanded, instructions become available: **Select an existing rating scale upon which to base your new scale. Make your edits and save.** The options to choose from are: Default Scale, Interview Ratings Scale and Travel Rating Scale.

   A. All options have a name text field that can be modified.
3. Click on the **Add** button.
4. Click on the **Save** button.



Feature Disabled

The FEATURE DISABLED sub-tab is no longer a supported/utilized feature and it can't be turned off completely in the system. This sub-tab was relabeled to indicate the inactivity.



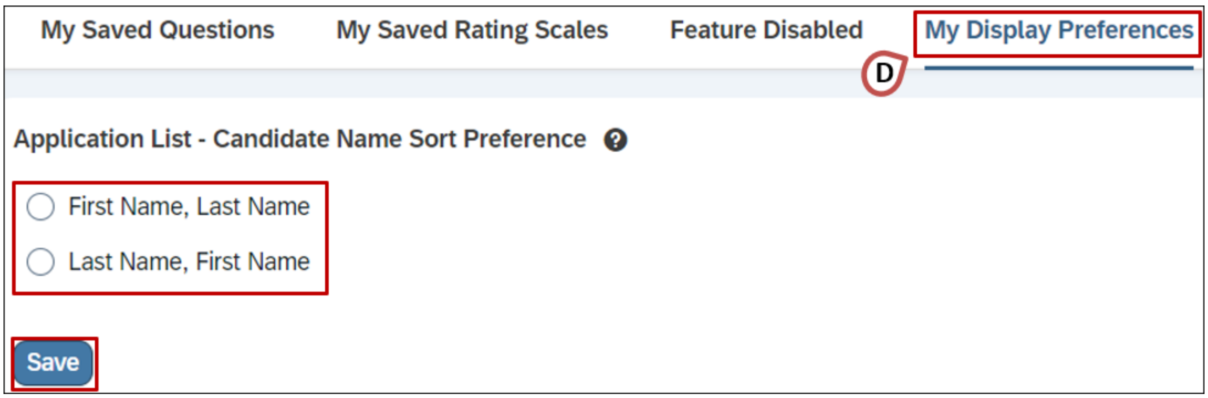
My Display Preferences

Go to the **My Display Preferences** sub-tab.

When the Hiring Manager is listed as an owner/originator of JR forms, you can sort the list by:

- First Name, Last Name, or
- Last Name, First Name.

The preference can be saved by clicking on the **Save** button.

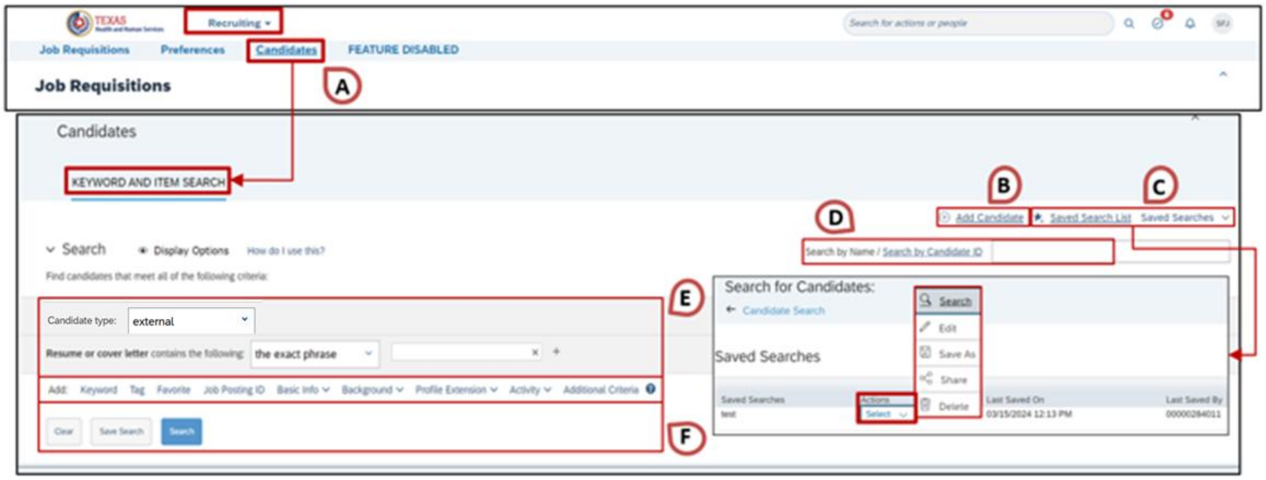


8.1.3 Candidates

This section shows those users who are assigned the HR Professional role in the Career Center how to access and utilize the *Candidates* tab under **Recruiting**.

> **Note:** This functionality is now only available to users who are in the HR Professional role in the Career Center. Users assigned roles with lesser permissions will NOT see the Candidates Tab or the Candidate Search section.

To search for candidates:



A. Access the *Candidates* tab in *Recruiting*. The *Keyboard and Item Search* sub-tab shows up.

B. **Add Candidate link**: **Not used by Hiring Managers.** This feature is mainly used by the **Service Center** team to create basic profile candidate users. These candidates will **not** be linked to the State of Texas PeopleSoft application and can be used for testing purposes or ad hoc applications.

C. **Saved Searches**: Hiring Managers can create a *Saved Search List* or *Saved Search* collapsible menu (quick access) for candidates that are searched frequently. It's possible to initiate and edit the saved search by adding or deleting candidates from the list or editing/deleting the search criteria to narrow the search down. The saved searches can also be shared with other colleagues.

D. **Candidate Search**: Search by *Name* or *Candidate ID*. When selecting a candidate from the search list, the user will be directed to the profile. It's possible to save a personal search list with multiple, frequently searched candidates stored.

    a. If searching by Name or Candidate ID and picking a candidate from the upcoming list, the Hiring Manager will be redirected to the **basic information profile** of the candidate.

E. **Keyword and Item Search**: Search for candidates based on certain criteria such as:

    - Candidate type drop-down menu.

- Resume or cover letter contains the following, a drop-down menu to further define the search and a text field.
- Add a: Keyword, Tag, Favorite, Job Posting ID, Basic Info, Background, Profile Extension, Activity or Additional Criteria.

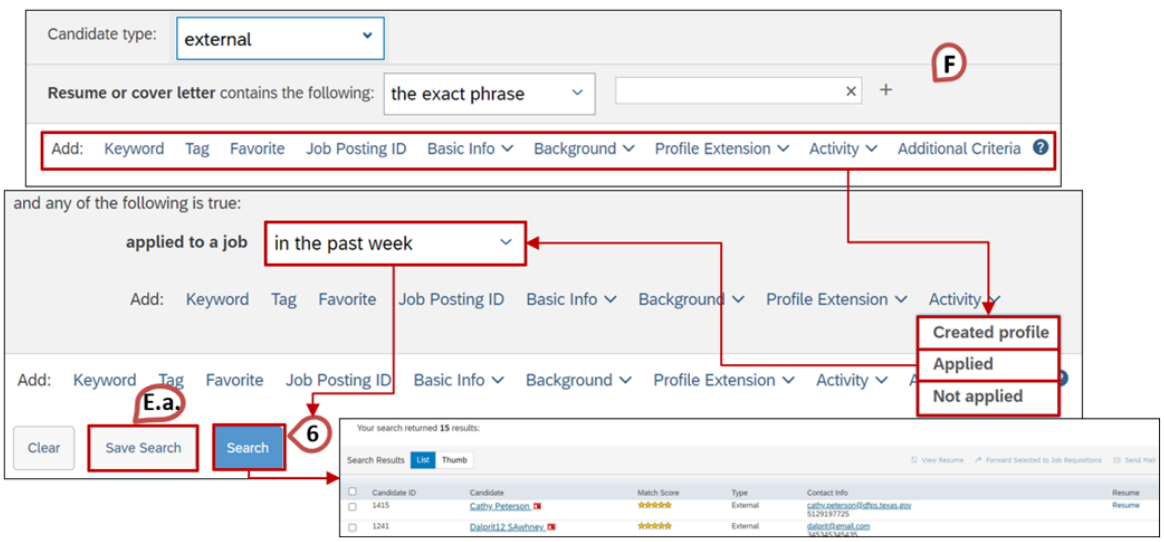
F. Click on the *Save Search* button after setting up all criteria.

G. Add a *Search Name* in that text field and save the customized search by clicking on the **OK** button.

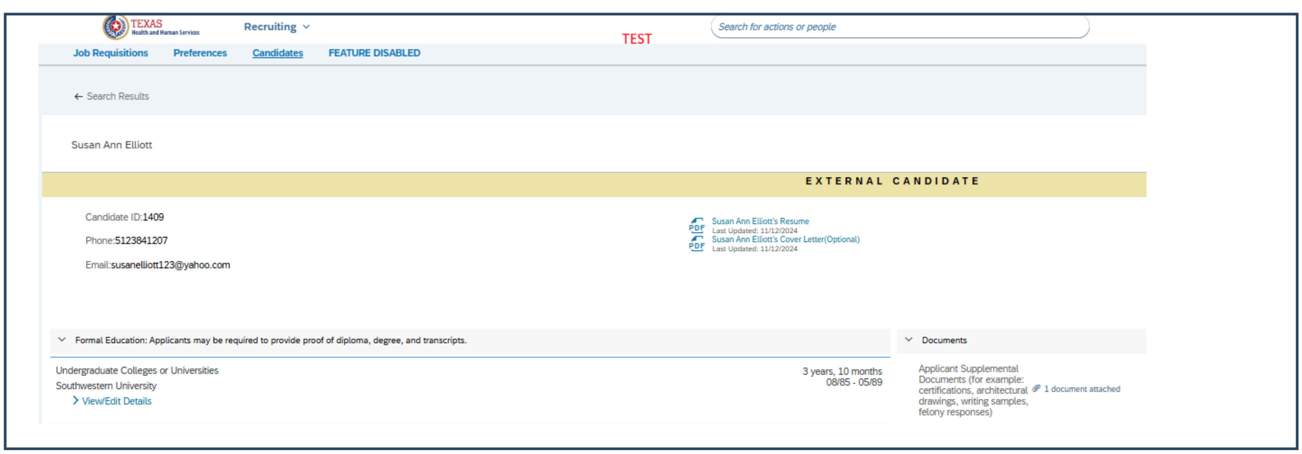
The saved search will appear in *Saved Searches* collapsible menu.

H. When trying to search based on certain criteria, select *Search* **after using at least one of the criteria.**

Example: From the Add section Activity search criteria was selected. It has a menu of options: Created profile, Applied and Not applied. One of those options must be selected before you click on the Search button.



When looking at a Candidate's information, you will see this page appear.



> **Note:** The **HR Professional** Role will be able to see to see a section labeled "*Jobs Applied*" when looking at a candidate's information.

8.2 Managing Vacancies

> **Note:** Before creating a JR, the Hiring Manager should check if vacant positions are already available in the Position Org Chart or if a new position needs to be created first.

8.2.1 Position types

There are two different position types at the State of Texas:

- **Single Tap positions**: Individual Positions with same salary grade.
- **Career Track positions**: Positions based on multiple levels. So, you can find different positions with the same position title but with different levels. For example:

- Director I (blue)
- Director II (green)
- Director III (red)

Career Track position titles can have any of the these prefixes: APS, CPI, CPS, FGC. They will always include a roman numeral at the end (I, II, III, IV…) according to the position level and salary grade.

See the below table which describes the internal *Career Track* process and how to manage candidates throughout the different *Career Track* positions and opened JPs:

Position	JP creation	Posting Advertisement Type	Candidate Application
Pharmacist I	Yes	Internal/ Internal and External	The candidate applies to the JP manually via Careers section (internally) or Career Center (externally).
Pharmacist II	No	N/A	Hiring Manager will create an Offer letter for the Pharmacist II position and its respective salary grade based on experience/skills of the candidate.
Pharmacist III	No	N/A	Hiring Manager will create an Offer letter for the Pharmacist III position and its respective salary grade based on experience/skills of the candidate.

Additionally, for **Career Track positions** we can find the same position title with different position codes. that in the Position Org Chart for the same position we could have plenty of openings. This will be defined by the Hiring Manager when creating the JR.

Example:

- Pharmacist II (00020313) (blue)
- Pharmacist II (00020459) (blue)

or

- Director II (00020460) (red)
- Director II (00020292) (red)

> **Note:** Only the lower-level positions (level 1) get posted internally and externally as open for applications and will be extended by the Hiring Manager based on the assessment and interview results of the respective candidate.

8.3 Create and Update Job Requisitions

After a position is visible in the Position Org Chart (*Create Job Requisition* tab of the *Company Info* section), it's ready for the hire of a new employee for it, the Hiring Manager can create a *Job Requisition* based on the position.

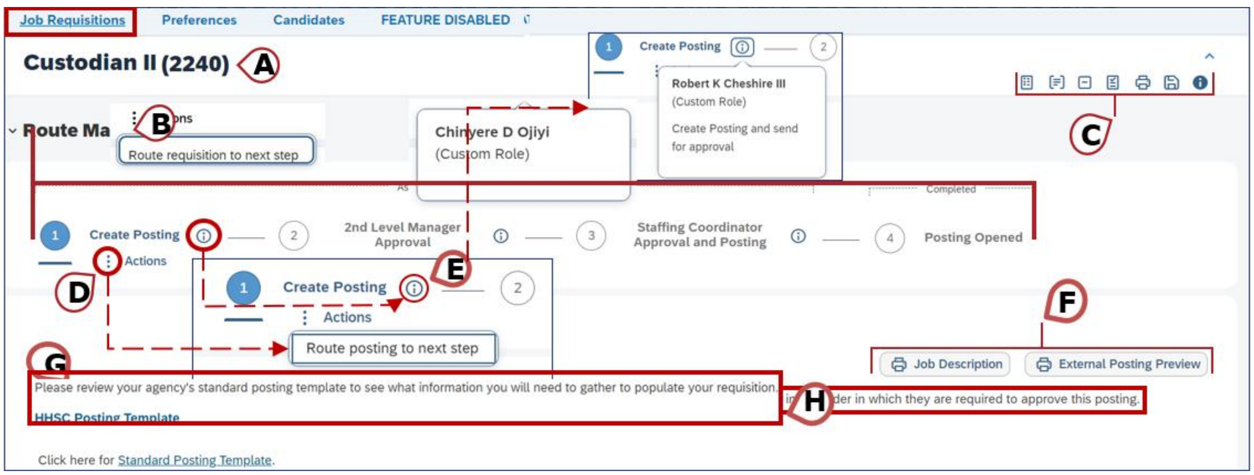
> **Note:** The process is used to create *JRs* based on *Single tag* or *Career Track* positions. For further information, refer the Position types chapter.

Please review the chapters 7.2.2 Create Job Requisition Navigation and 7.3 Creating a Job Requisition to understand this process.

8.3.1 Update Job Requisition Forms

After selecting a pre-approved JR, Hiring Managers need to review the *JR Form* and update it according to the required information.

> **Note:** Fields marked with a red asterisk (*) are mandatory to fill and be able to save the updated posting. A lot of fields are not editable here, as they get filled with data from the PeopleSoft records directly or prepopulated/carried over based on the details of the position used to create the JP.



A. **JR Title and ID**: Header of the page, shows title and ID of the posting.

B. **Route Map**: Displays the JR approval process.

C. **Additional options**: Display and download options at the top right of the page. The options include: *View Full Form, View Form by Section, View Form by Item, Print Preview, Print to HTML or PDF, Save the entire Form, Info about this Form*.

> **Note:** The first three options do **not** have utilized functions in the system, the other options are explained by their labels.

D. **Action button**: Postings can be routed directly to the next approver step.

E. **Stage Assessment information button**: Hiring Managers can see the roles and responsible persons involved in the approval steps by selecting the Stage Assessment information button (an information icon) next to the step text.

F. **Posting Preview**: The Job Description button links the Hiring Manager information entered during the further JR creation. The *External Posting Preview* button does not show anything for Hiring Managers, another role (Staffing Coordinator) that manages the *External Career Center* postings will be able to see external descriptions.

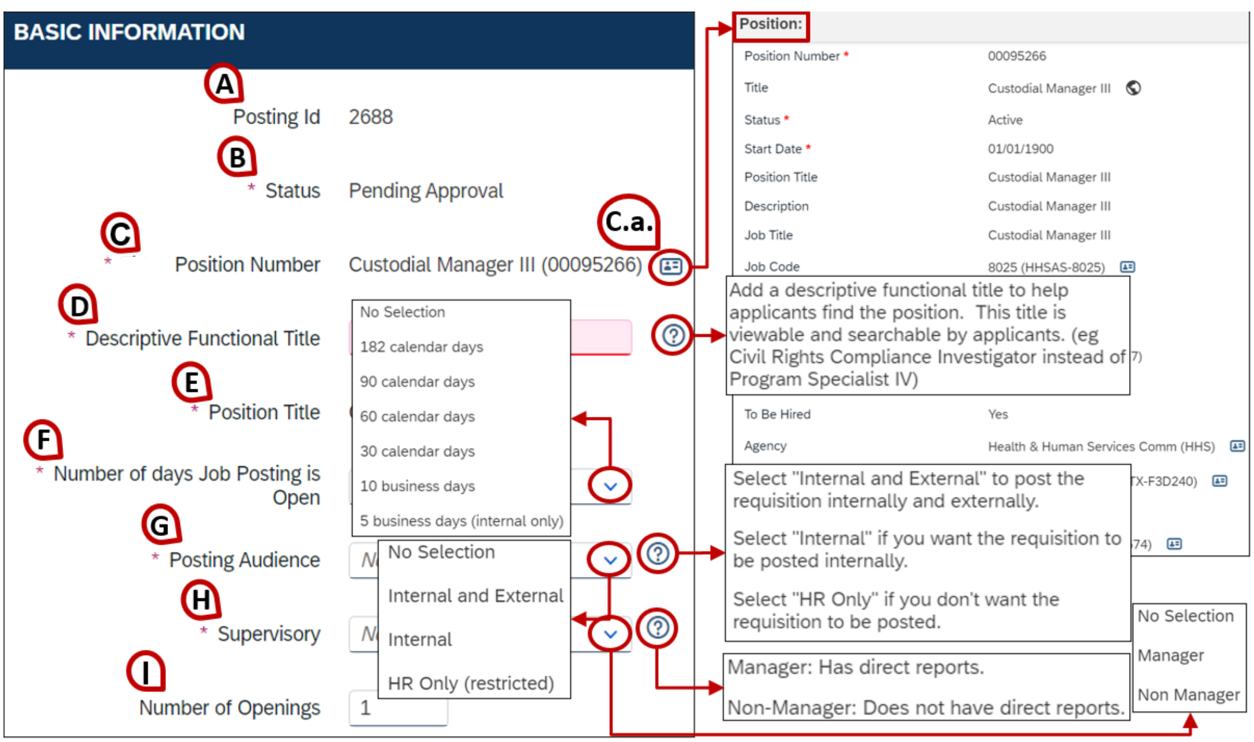
G. **Instruction section**: Shows instructions regarding the creation of *JR Forms*. Same instruction as in the note at the beginning of this chapter.

H. **Standard Posting Template**: A quick-link to the standard posting template of the agency assigned in the *JR form*. Use the template as a guide to fill the sections of the *JR form* (further information: **B** in [7.1.5 Resources](#)).

> **Note:** Content which was filled into the template should be pasted into the *Job Description* field of the *JR Form* in the recruiting system.

8.3.2 Basic Information

The first section Hiring Managers will review and update accordingly in the **JR Form** below the Introduction section is the **Basic Information**.



A. **Posting ID**: Identification number that gets generated and assigned by the system when a JR gets created.

B. **Status**: Reflects the current *Status* of the JR, either *Pending Approval*, *Open* or *Closed*.

C. **Position Number**: Title and number of the position chosen to create the JR.

   a. Click on the **View Title/Position Number** button (a card icon) to view position details.

D. **Descriptive Functional Title**: Title of the position which can be **modified** by Hiring Managers to clarify position specifications. The *Descriptive Functional Title* is used to help finding JRs.

E. **Position Title**: Title of the position used to create the JR. Gets automatically populated to reflect the same title as in the respective position details. It is **non-editable** in the form.

F. **Number of days Job Posting is Open**: Refers to the number of calendar days that the JP will stay opened/posted. Options are:

   - 5 business days (internal only). The value *5 business days (internal only)* will determine the JP only showing for internal applicants, other values will show for chosen *Posting Audience*.
   - 10 business days
   - 30 calendar days
   - 60 calendar days
   - 90 calendar days
   - 182 calendar days

> **Note:** The picked value of this field will define the Posting Start and End Date.

G. **Posting Audience**: Three options to choose for the publishing of the posting:

   - **Internal and External**: Job is posted internally (within the *Internal Career Center*) and externally (outside of SuccessFactors in the *External Career Center*).
   - **Internal**: Job posted only internally (within SuccessFactors for internal applicants).

- **HR Only (restricted)**: Only HR admins and Recruiters will be able to see the posting in the system.

  a) **Posting Audience Description button**: Select this button (a question mark icon) to see additional information/explanations about the field.

> **Note:** This field will define the Posting Type of the JP.

H. **Supervisory**: Reflects the hierarchy level of the position. There are two options:

- **Manager**: The new position will have direct reports to manage.
- **Non-Manager**: The new position will **not** have direct reports and will function as a regular employee position.

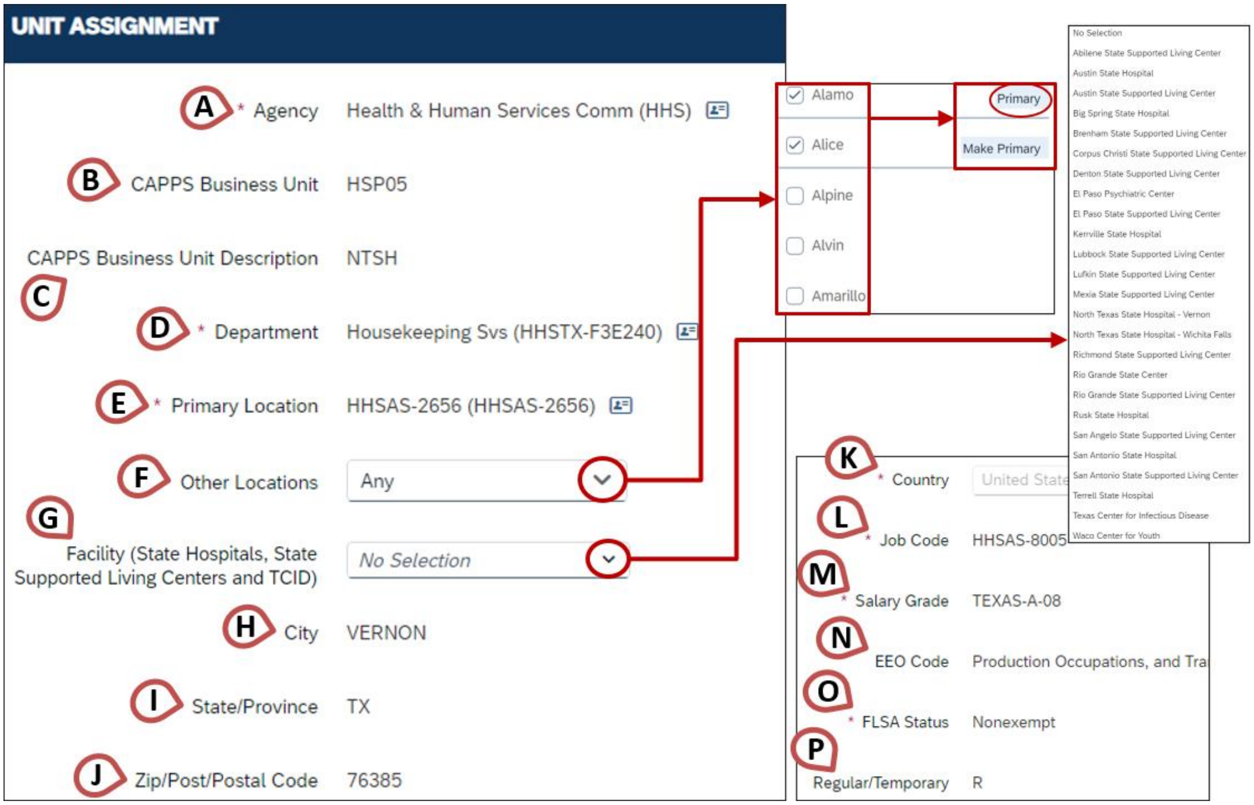
  a) **Supervisory Description button**: Select this button (a question mark icon) to see additional information/explanations about the field.

I. **Number of Openings**: By default, only 1 position will be opened, but Hiring Managers can modify the value based on the required number of positions they need to fill.

> **Note:** If more than one opening is set, the Hiring Manager should provide a different position code in the Offer phase of the applications.

8.3.3 Unit Assignment

The *Unit Assignment* section will have most of its fields prepopulated or their values carried over based on the **position details** and the respective **PeopleSoft profile (if existing)**.



A. **Agency**: Prepopulated from the file (**PeopleSoft profile**).

B. **CAPPS Business Unit**: Prepopulated from the file.

C. **CAPPS Business Unit Description**: Prepopulated from the file.

D. **Department**: Prepopulated from the file.

E. **Primary Location**: Prepopulated from the file.

F. **Other Locations**: Is a multi-select with cities as location options. Set one primary location if multiple locations were selected.

G. **Facility (HHSC/DSHS only)**: An option drop-down menu with State Hospitals, State Supported Living Centers and TCID Facility locations as options. This only refers to HHSC and DSHS agencies.

H. **City**: Prepopulated from the file.

I. **State/Province**: Prepopulated from the file.

J. **Zip/Post/Postal Code**: Prepopulated from the file.

K. **Country**: Prepopulated from the file.

L. **Job Code**: Prepopulated from the file.

M. **Salary Grade**: Prepopulated from the file.

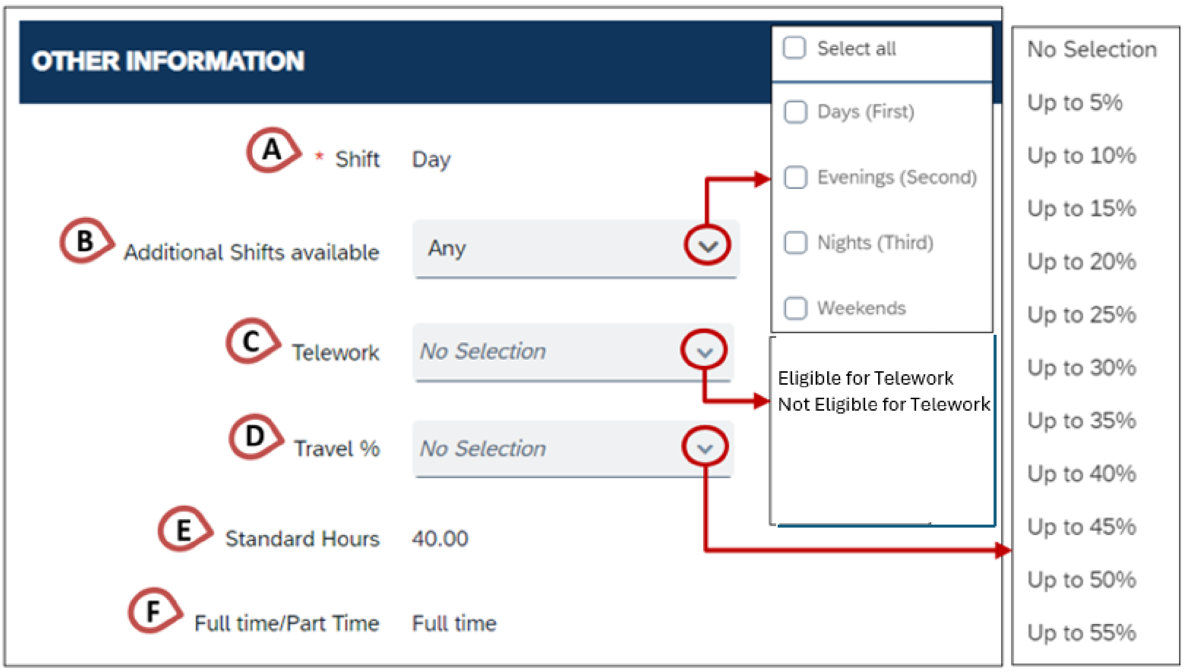
N. **EEO Code**: Prepopulated from the file.

O. **FLSA Status**: Prepopulated from the file.

P. **Regular/Temporary**: Prepopulated from the file.

8.3.4 Other Information

Additional information fields will be prepopulated according to the PeopleSoft profile (if existing) in this section.



A. **Shift**: Prepopulated from the file (**PeopleSoft profile**).

B. **Additional Shifts available**: For positions such as Directors that are **not** shift workers, Hiring Managers need to choose the suitable options from the drop-down menu options (Days (First), Evenings (Second), Nights (Third) or Weekends). One option has to be selected as primary.

C. **Telework**: Choose from the drop-down menu the suitable option depending on the position (Eligible for Telework or Not Eligible for Telework).

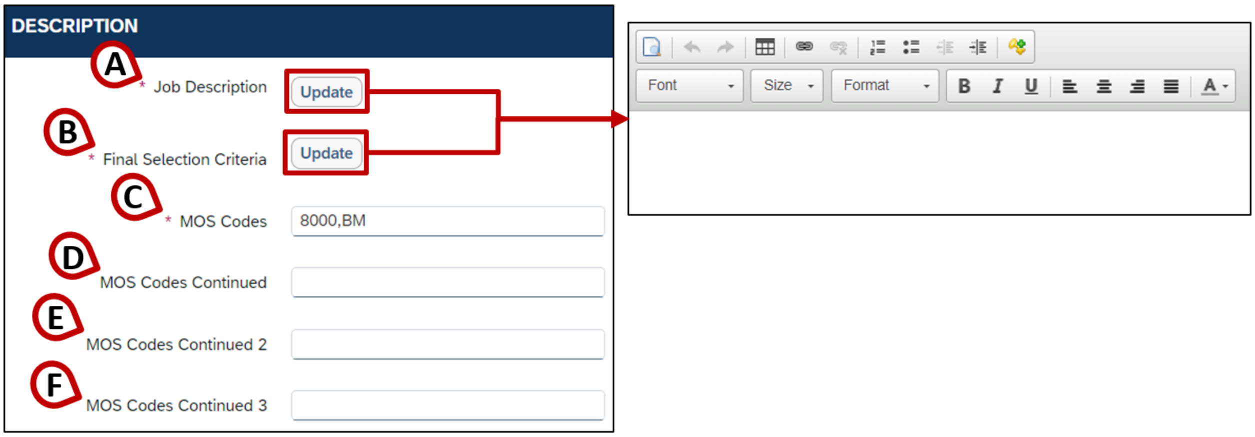
D. **Travel %**: Refers to the percentage of travel availability. There is a No Selection option and the remaining options start at 5 % and increase in increments of five up to 100 %.

E. **Standard Hours**: Prepopulated from the file.

F. **Full time/Part Time**: Prepopulated from the file.

8.3.5 Descriptions

This section covers the Job Description which should be based on the Standard Posting Template. The other fields are explained below.



A. **Job Description**: Select the *Update* button to add a job description. Paste the details entered previously in the Job Description section from the **Standard Posting Template.**

> **Note:** Further information: Standard Posting Template.
>
> **Note:** For **Career Track positions**, Hiring Managers should include as many Job Descriptions as there are position levels. For **Single tap positions** only one Job Description needs to be included in the section.

B. **Final Selection Criteria**: Select the *Update* button to add a final selection criteria. Paste the details entered previously in the section Final Selection Criteria from the *Standard Posting Template*.

C. **MOS Code**: Prepopulated Military Occupational Specialty code. Review the prepopulated values. Pre-configured MOS Codes are **not** searchable in the current system, they have to be entered manually.

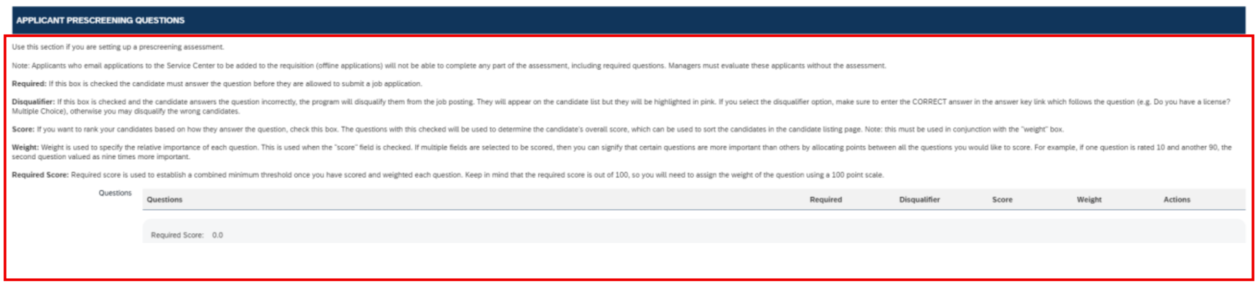
D. **MOS Codes Continued**: Additional MOS Code values can be entered here.

E. **MOS Codes Continued 2**: Additional MOS Code values can be entered here.

F. **MOS Codes Continued 3**: Additional MOS Code values can be entered here.

8.3.6 Applicant Screening Questions

This section gives Hiring Managers the option to define pre-screening assessment questions that will show up as part of the candidate application process. If added, these questions can be used to evaluate a candidate's overall qualifications, technical skill level, understanding of key concepts, business processes, and other key topics at the Hiring Manager's discretion based on the business needs for a given role. Depending on a candidate's response, the candidate either advances through the pipeline or is automatically disqualified for the position in the recruiting process and marked as Disqualified in the pipeline.



> **Note**: Pre-Assessment Screening Questions are added at the Requisition level. They can be added on the fly, or the Hiring Manager can create a list of frequently used questions in the My Saved Questions tab that they can browse from and add to a Requisition.

Pre-Screening vs Application Questions

The Career Center has a section on requisitions where you can add Pre-Screening Assessment questions. This is separate from the questions or fields the candidates complete on the application.

- The application fields are purely informational and do not automatically cause an action on the candidate.
- However, screening questions can be used to perform actions on candidates or provide information to help the Recruiter and Hiring Manager to quickly assess, score, weight and/or eliminate candidates from the pipeline.

Benefit of Feature

Requisitions can generate hundreds of applications. As a result, it is useful to have less qualified candidates automatically disqualified from the recruiting process or rated in a certain way to provide. Including pre-assessment questions on the application is a convenient way to request information from the candidate as a form of pre-screening. Hiring Managers often create Pre-Assessment Questions to help them create a more efficient candidate screening process.

> **Note**: The use of pre-assessment screening questions on the application saves the recruiting team valuable time by easily identifying top-rated candidates and prevents the need to review each application. These questions serve as a form of structured information gathering directly from the application process, which is crucial for evaluating suitability of candidate for the role. With the potential for receiving lots of applications, this feature is seen as a "lifesaver."

By doing some critical thinking when Hiring Manages create the Job Requisition, they can save themselves valuable time and effort in the applicant screening process by eliminating candidates who don't meet the required selected criteria based on the pre-assessment questions added. The result is a more streamlined and efficient candidate screening process that speeds up the "time to hire" process.

Facts About Pre-Screening Questions

Screening questions are good for job-specific questions as they can be adjusted each time you create a new Job Requisition.

Screening Questions:

- Must be added to each Job Requisition
- Can vary and be customized by Job Requisition for each role
- Can be set to be required by the applicant
- Can be set to be disqualifier questions
- Cascading questions are supported

> **Note**: Cascading questions are questions that are displayed based on the answer to the previous question, that is sub-questions with a dependence on a primary question.

- Do not apply to Offline applicants

> **Note**: Applicants who email applications to the Service Center to be added to the requisition (offline applications) will NOT be able to complete any part of the assessment, including required questions. In these instances, Hiring Managers must evaluate these applicants without the assessment.

Practical Uses for Pre-Screening Questions

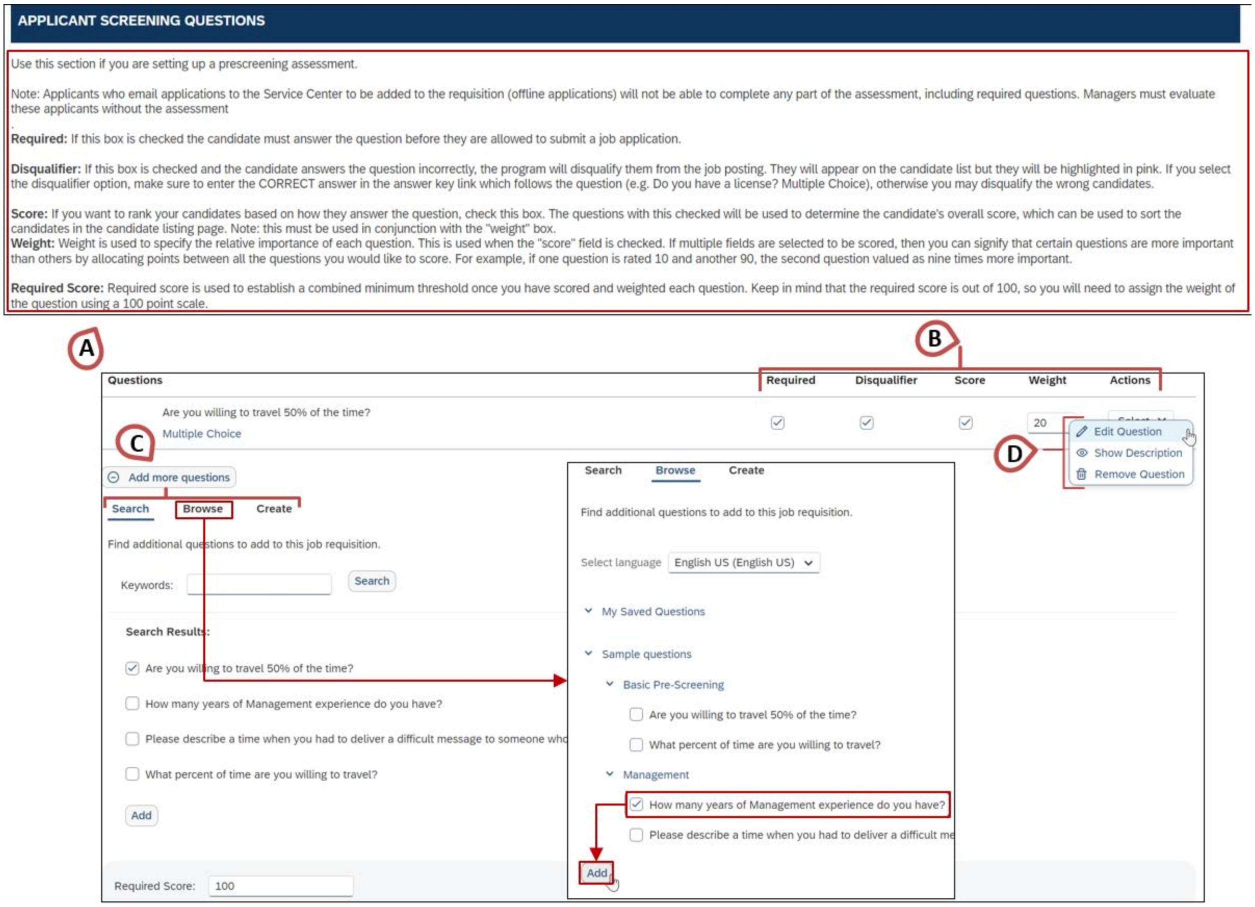
Here are some practice uses for Pre-Screening Assessment questions.

- Candidate screening can be used on items such as the following:
    - Eligibility for employment
    - Ability and willingness to travel the required percentage
    - License or certification requirements
- Job-specific screening to find suitable candidates that meet very specific criteria for a certain job like the following:
    - Education level
    - Employment background
    - Experience
    - Knowledge, skills, and abilities

No Pre-Screening Questions

If the Hiring Manager does not want to create any pre-screening assessment questions, there is nothing that needs to be done in this section and the Hiring Manager can move on to the next section on the Job Requisition form, Interview Questions & Knowledge, Skills and Abilities Assessments.

System Overview of Pre-Assessment Screening Questions



A. **Instructional information**: Description of the different criteria that should be considered when adding new assessment questions.

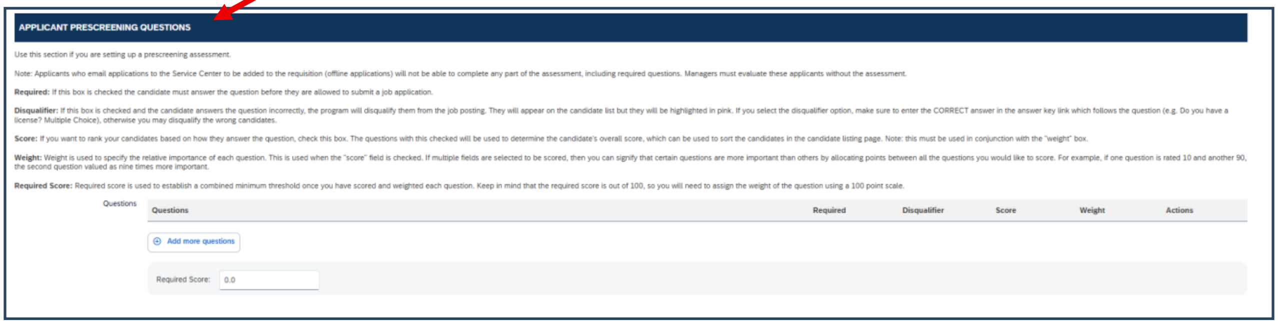
B. **Question Settings**: Options to make a question *required* to be answered, a *disqualifier* based on a candidate's answers or *score relevant* if a question is used with a certain weight and *required score* to achieve by the candidate.

C. **Add more questions button**: Add a new question from the search catalogue by entering keywords, browse pre-saved catalogue questions saved under *My Saved Questions* or create new ones. These questions will only be available for the specific posting and will **not** be saved.

D. **Actions**: Once you have added questions a drop-down menu appears in the Actions column for each question. Use the Actions menu to Edit, Show Description or Remove Question. The Show Description option creates a text field below the question to edit.

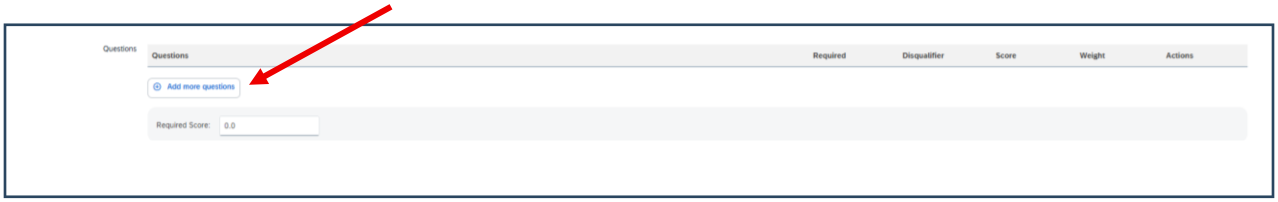
Creating Pre-Assessment Screening Questions

Here are the steps for adding Pre-Assessment Screening Questions directly to your Job Requisition.

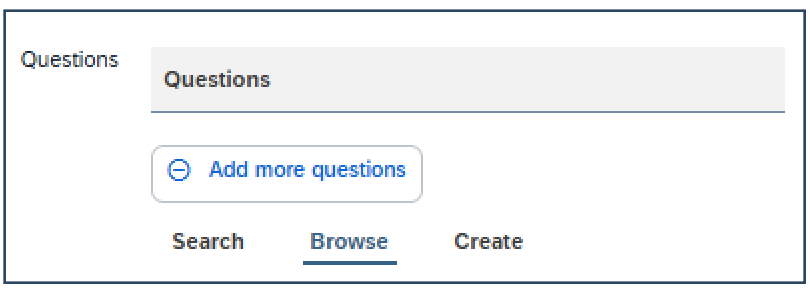


Step 1 – Select the Job Requisition you want to add Pre-Assessment Questions to.

Step 2 – On the Job Requisition Form in the Applicant Prescreening Questions section, select "**Add more questions**" link.



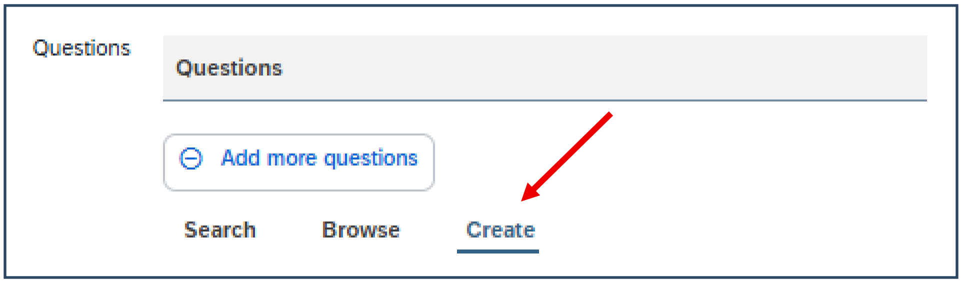
You will see this screen.



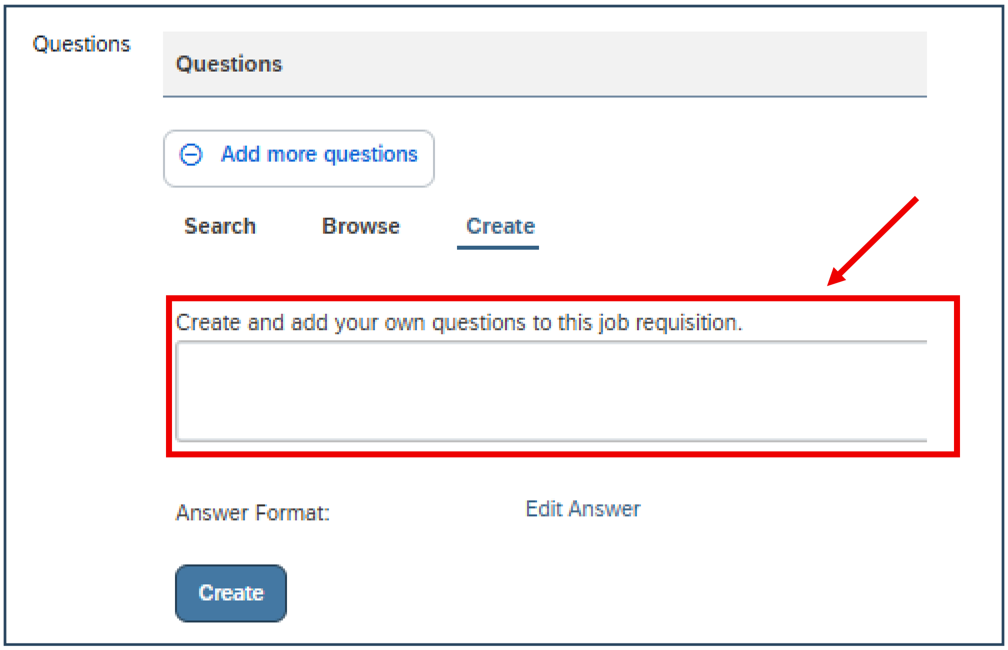
You will notice that you have three options:

- Search for keywords to existing questions you have already saved,
- Browse through your saved questions if you've already added your frequently used questions, or
- Create them on the fly and add them to the job requisition.

Step 3 – Select the **Create tab**. Use this option to create a question on the fly.

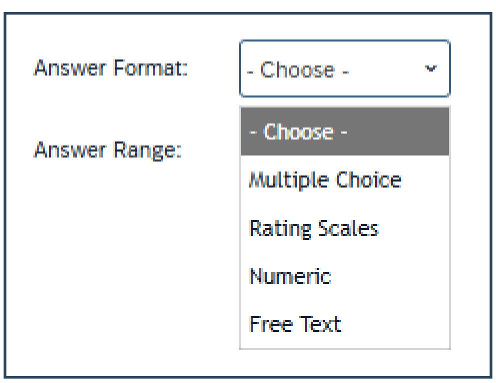


You will see this screen below where you can add in your question.



Step 4 - Add your question in the Questions field.

Step 5 – Select the Answer Format from the list provided.

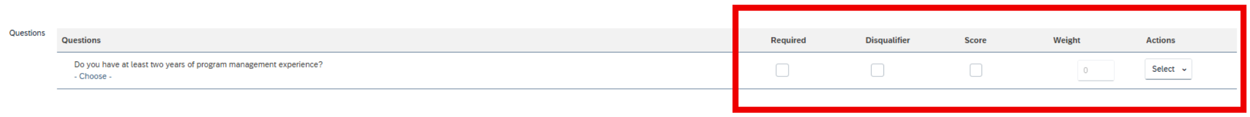


Step 6 – Provide any additional information required dependent on your Answer Format selected.

- Multiple Choice: Answer Range and Correct Answer
- Rating Scales: Answer Range and Desired Answer
- Numeric: Desired Answer
- Free Text: Answer Range

Step 7 – Select the **Create** button

Step 8 – Decide on additional selections on the question field.



- **Required**
  - Check this box if the question must be answered by the candidate.
  - If a candidate does not put in the correct answer, they are automatically disqualified (and move to that status in the pipeline).
- **Disqualified**
  - Check this box if the question will be a disqualifier question.
  - If a candidate does not put in the correct answer, they are automatically disqualified (and moved to that status in the pipeline).
- **Score**
  - Check this box if the question is to be scored, which is used to generate an overall rating for the candidate and can be used to disqualify.
  - This score or rating can be seen on the candidate summary, and candidates can be sorted by score.
  - This helps the recruiter start with the most qualified candidates and work their way through the list, a form of "short-listing." You're able to weight candidates based on their answers, providing a quicker way to identify top talent.
  - The candidates who will not be advancing can be mass-disqualified.

- To use scoring for auto-disqualifying candidates, determine the *Required Score* that is needed for an applicant to pass the overall questions.

> **Note**: You decide the Required Score; this system does not automatically calculate that for you.

- If the total score of the applicant falls below the *Required Score* threshold, the applicant is automatically disqualified.

- **Weight**
  - If a question will count towards the total score of the applicant, you must determine by how much.
  - The Weight column can more accurately be described as **points**.
  - The total weight does not need to add up to 100 but instead is simply added to the total of the candidate.
  - You can assign higher points or weights to more important questions.

Step 9 – Continue adding questions using the steps outlined.

Adding Pre-Assessment Questions From Saved Q's List

If you have added and saved questions to your Saved Questions List, you can easily access them and add them to your Requisition. This functionality allows Hiring Managers and Recruiters to create and manage a library of Pre-Assessment Questions for use in job requisitions, saving time and standardizing the application process for candidates.

> The Questions Library provides value by ensuring legal compliance, fostering consistency in screening, automating candidate disqualification and scoring, and enabling efficient pre-screening of large applicant pools. By centralizing questions for use across requisitions, companies maintain control over content, improve recruiter productivity, and create a more standardized and fair hiring process.

Value of a Questions Library

- **Question Library Management:** Hiring Managers and Recruiters can create new questions, define answer formats and designate correct or desired answers, which are then stored in a reusable library.

- **Legal & Policy Compliance:** Questions can be submitted to legal team for review before adding them to the library, ensuring they align with company policy and minimize legal risk.

- **Pre-Screening and Efficiency:** When adding these questions to a job requisition, candidates answer them during the application process. This allows Recruiters and Hiring Managers to quickly filter out unsuitable candidates, preventing the need to review every application. This pre-screening allows the system to automatically identify qualified candidates, significantly reducing the time recruiters spend on initial application reviews.

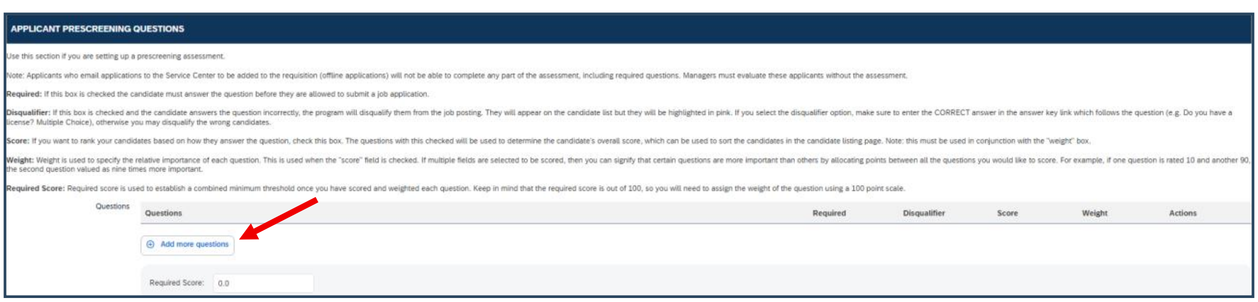
- **Standardization and Consistency:** Saved questions ensure that all candidates for a particular role are asked the same questions, using the same wording and format. This consistency helps ensure a fair and unbiased application evaluation process.

- **Improved Candidate Experience:** Adding and using questions from your My Saved Questions list ensures consistent candidate experience and fair comparisons.

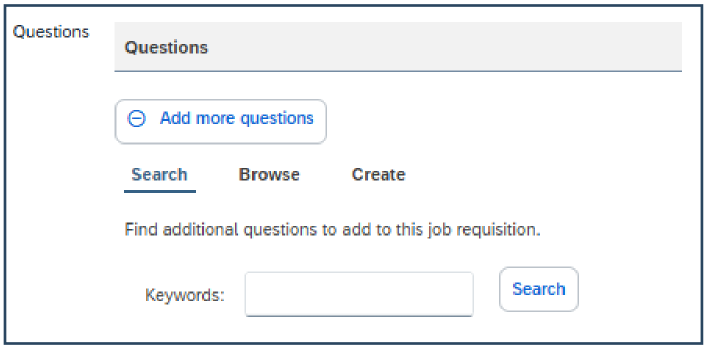
Follow these steps below.

Step 1 – Select the Job Requisition you want to add Pre-Assessment Questions to.

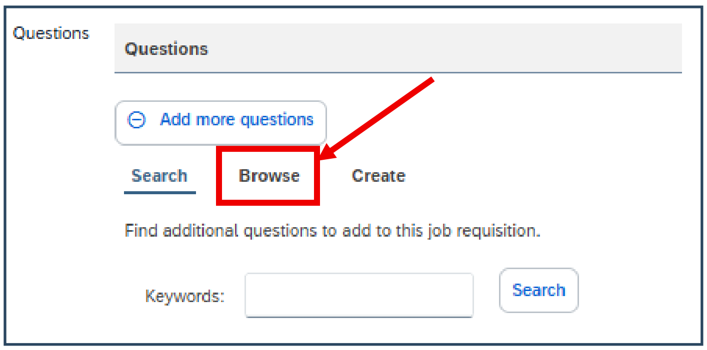
Step 2 – On the Job Requisition Form in the Applicant Prescreening Questions section, select "Add more questions" link.



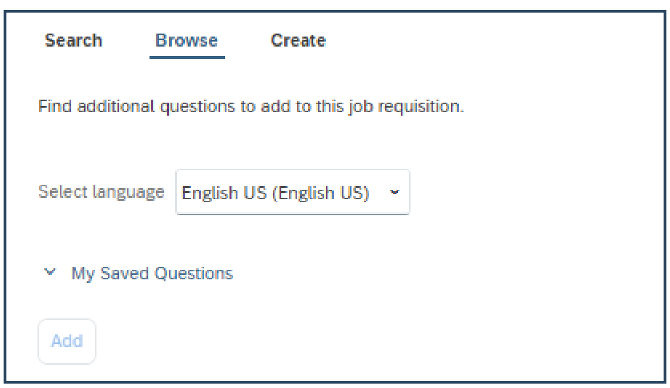
You will see this screen.



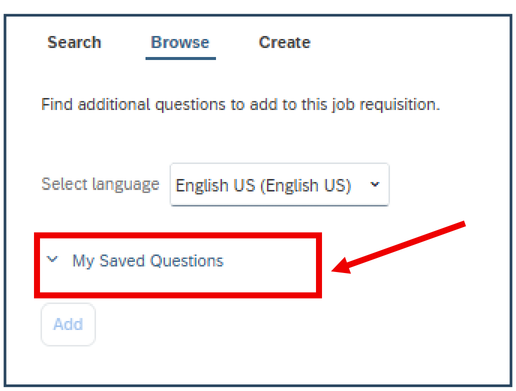
Step 3 – Select the Browse Tab.



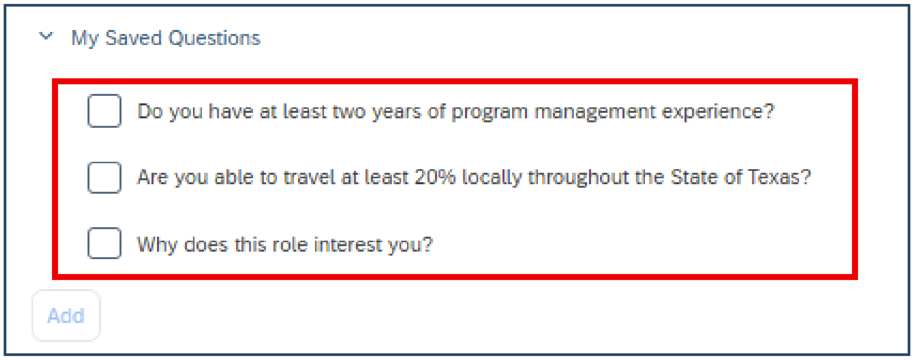
You will see this screen.



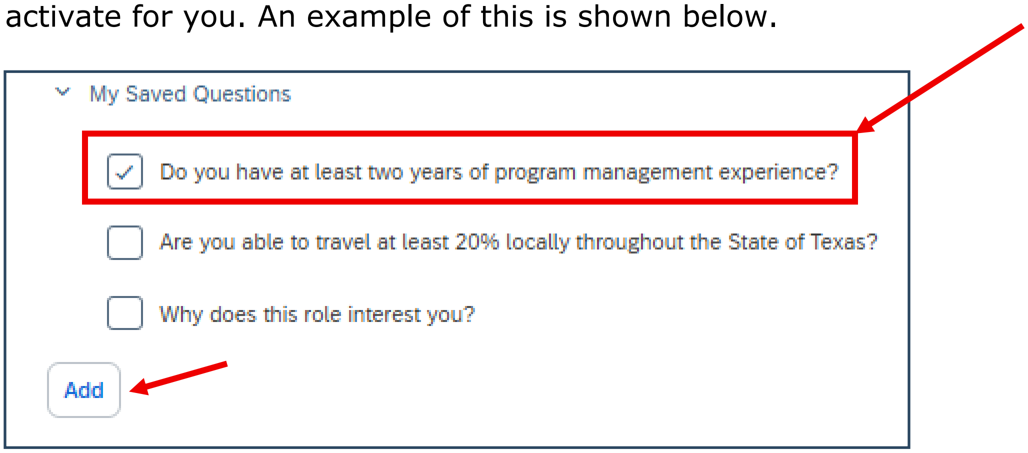
Step 4 – Select the My Saved Questions link



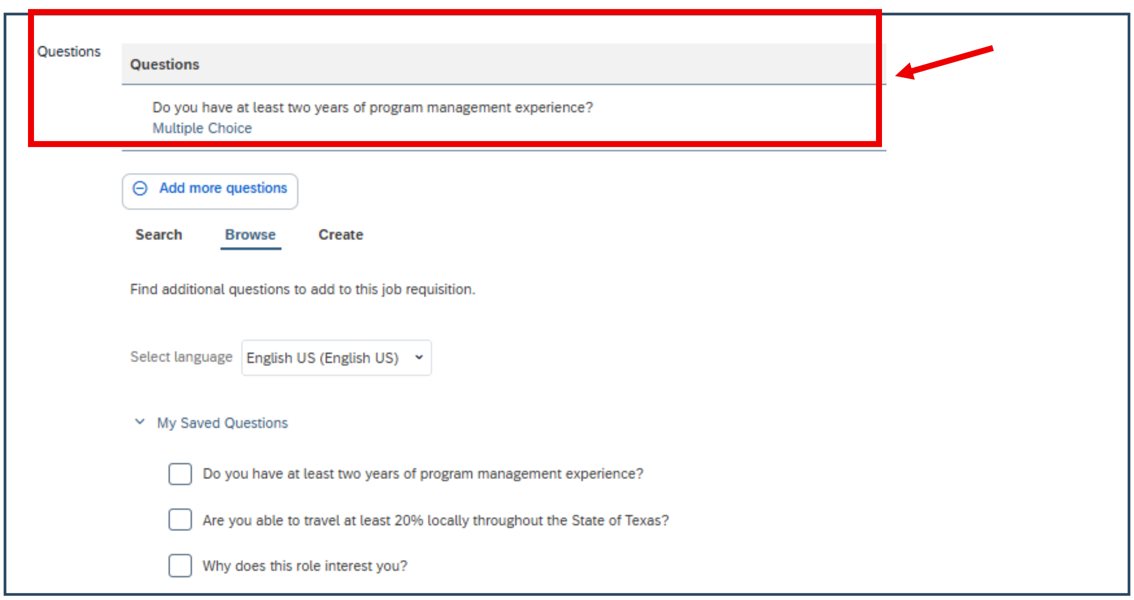
You will see this screen. (Examples of My Saved Questions are shown below.)



Step 5 – Check the boxes next to the Pre-Assessment questions that you'd like to add to the Job Requisition. Once the questions are selected, the Add button will activate for you. An example of this is shown below.

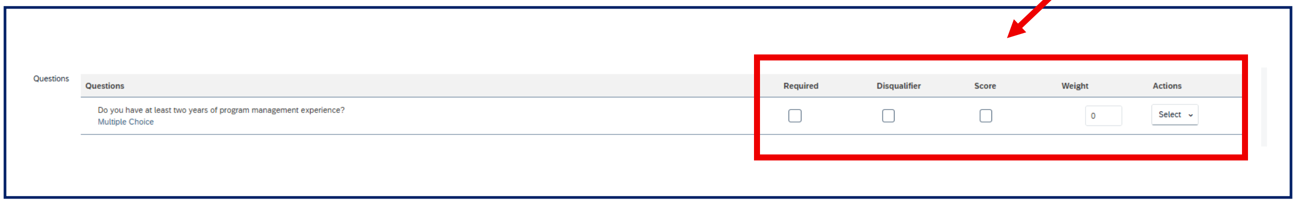


Step 6 – Select the Add button. You will see this screen below. The questions you added from the My Saved Questions list display at the top.



Step 7 – Select the extra question criteria for each question added as needed.

Example: Required, Disqualifier, Score, Weight.



Saving Frequently Used Pre-Assessment Questions

You also have the option of adding and saving your frequently used Pre-Assessment questions so you can easily access them again in the future. This is a great time-saving feature.

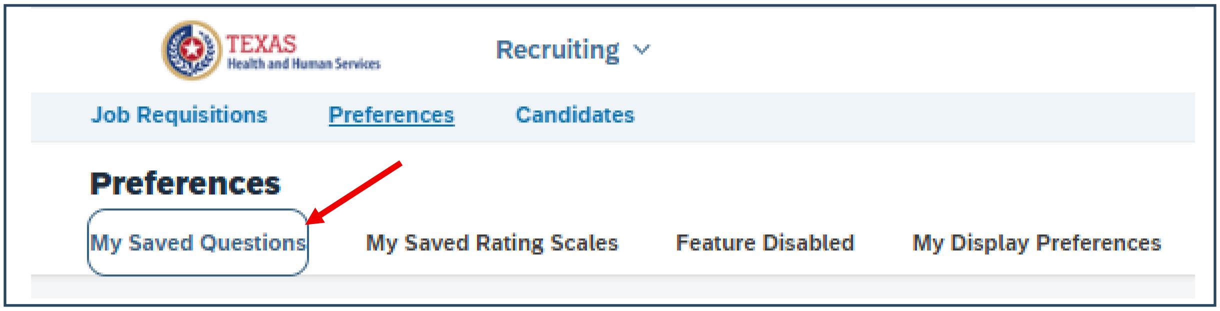
> **Note:** To add your own assessment questions, go to *Recruiting* menu option, *Preferences tab, My Saved Questions* sub-tab and create a list of frequently used assessment questions. Using this feature results in less manual work for the Hiring Managers during the JR form review and update process.

These specific steps are outlined below:

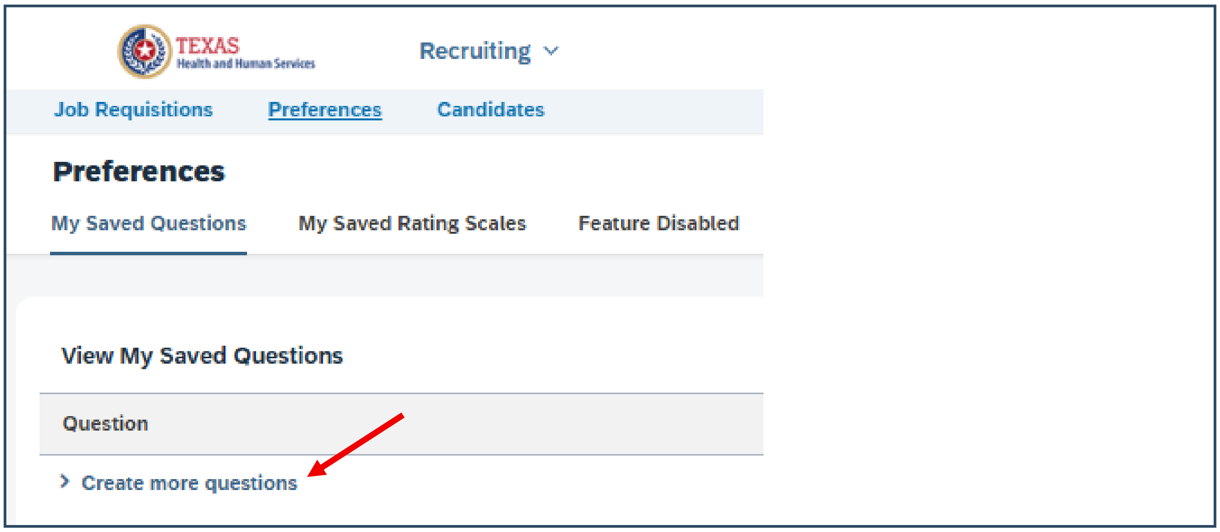
1. Select Recruiting from the main menu.

2. Select the Preferences tab.

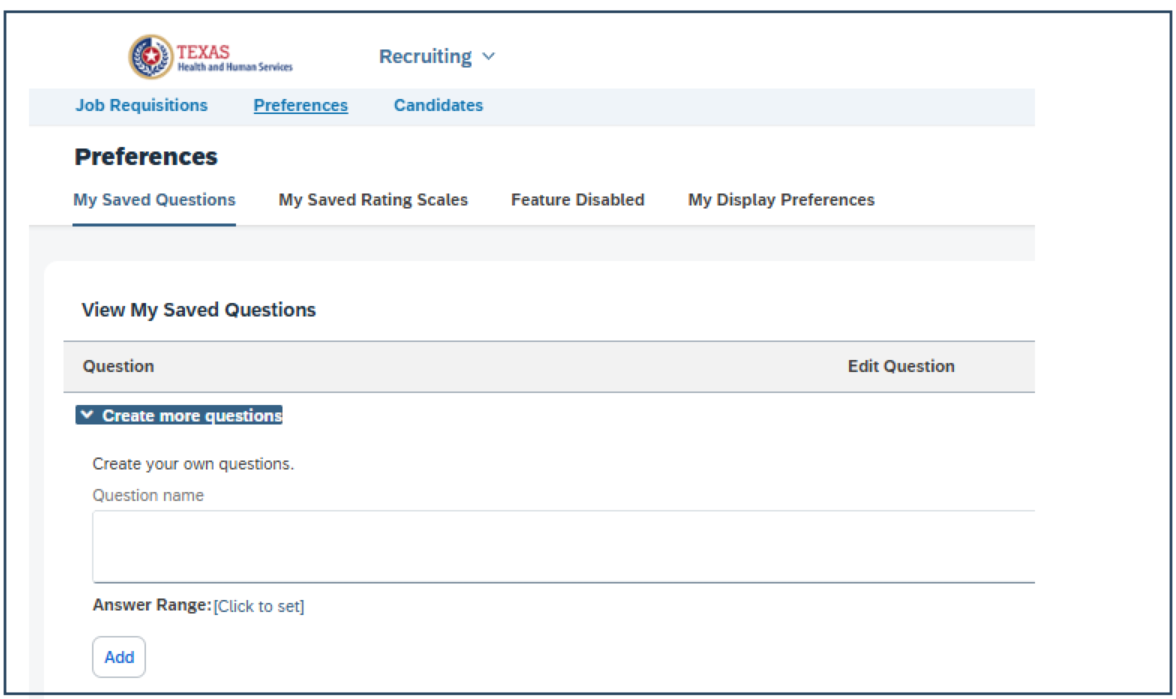
You will see this screen. It will default to the My Saved Questions tab.



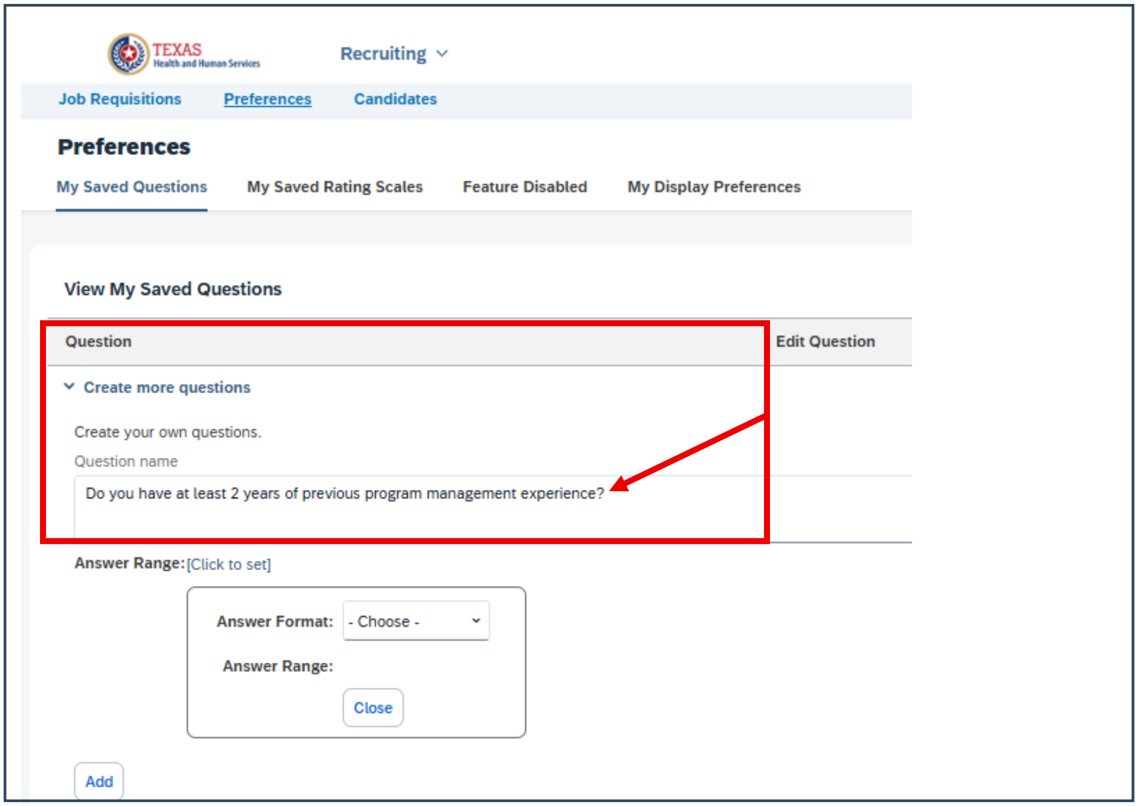
3. Select the "Create more questions" link



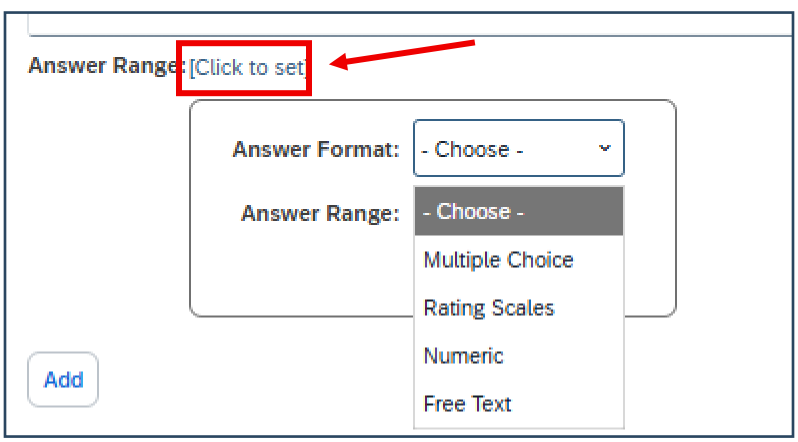
You will see this screen.



4. Enter your question in the Question name field.



5. Select the "Click to set" link to choose your question format.



- If Answer Format is Multiple Choice, add an answer and choose Correct answer and then the Close button.
- If Answer Format is Rating Scales, select either Default Scale or Interview Ratings scale and choose the Desired Answer and then the Close button.

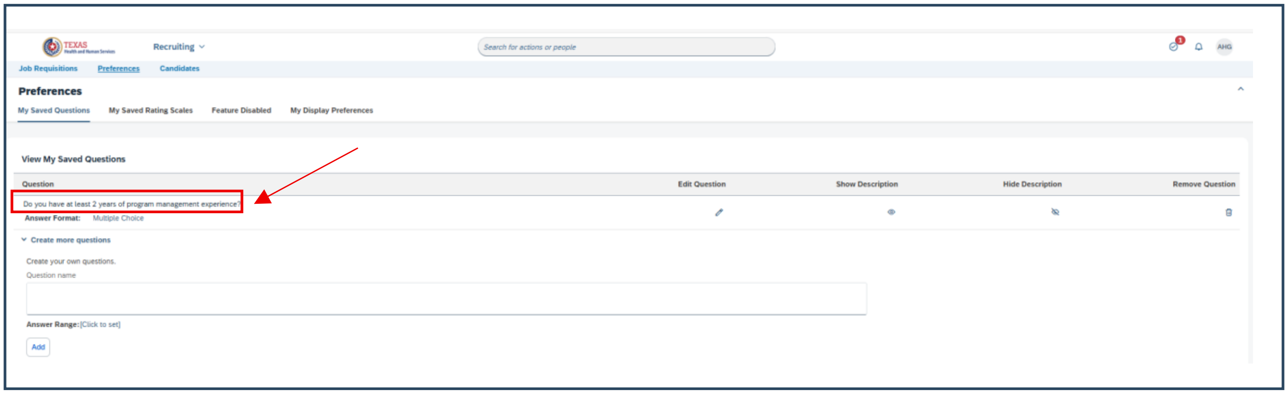
- If Answer Format is Numeric, enter the number and the Desired answer and then the Close button.

- If Answer Format is Free Text, enter the Answer Range and then select the Close button.

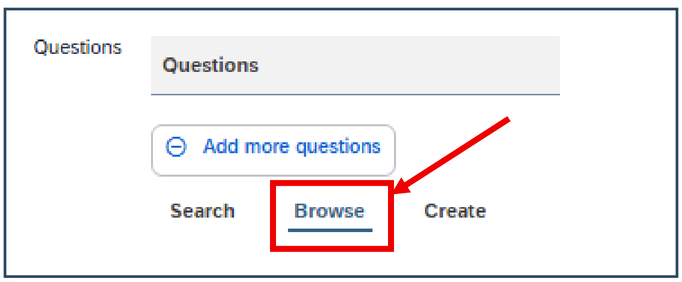
6. Select the Add button.

7. Select the Save button.

Your question will then appear in the Question area.

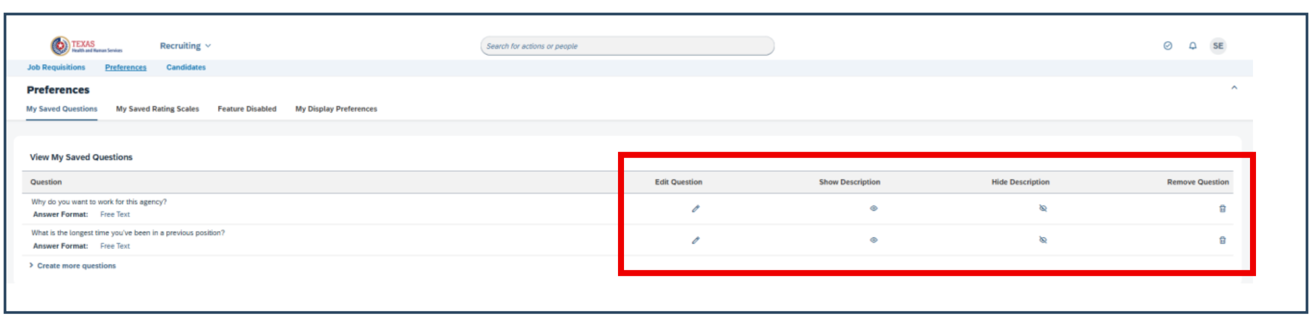


You can continue to follow these steps to add additional questions to your My Saved Questions list. These questions will appear for you to choose from if you select the "Browse" tab when adding Pre-Assessment questions to the Job Requisition.



Editing and Removing Questions from My Saved Questions

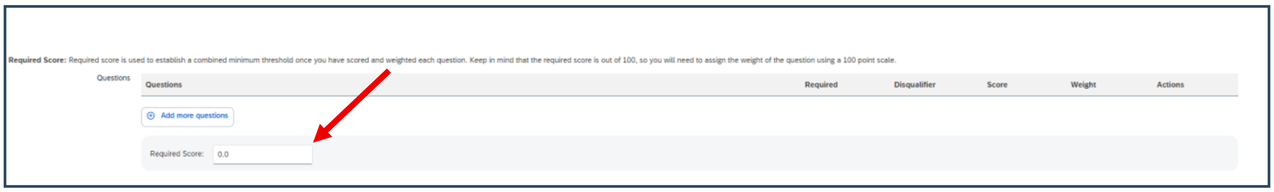
Once you have added Pre-Assessment Questions to your My Saved Questions list, you can easily edit or remove questions as needed.



Pre-Assessment Question Results

If you add Pre-Assessment Questions, you need to understand how the Required Score field works in the Career Center when assessing a candidate's responses against the criteria that you set.

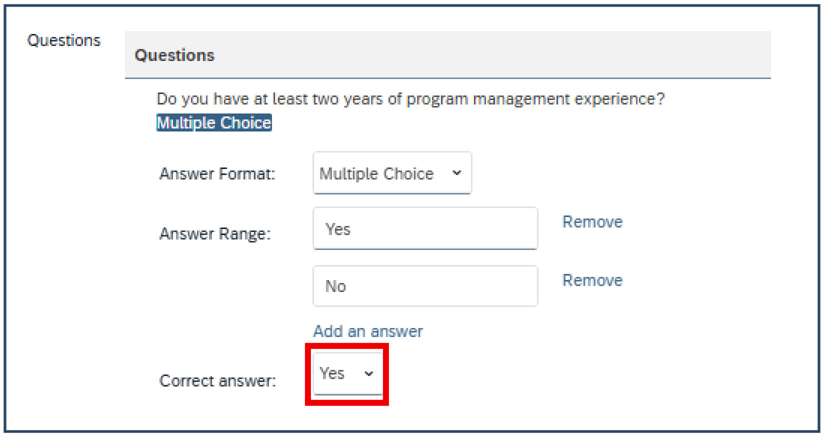
The **Required Score** field is the required value that will be needed by the applicant's assessment score to move the applicant forward in the pre-screening assessment process. If the number is below the Required Score, the candidate is automatically disqualified from the job application process. This is why the Question Settings are very imporant when setting up your questions.



> **Note**: The **Required Score** is calculated as percentage average and not on the total points. The assessment results are calculated using the formula below.
>
> **Score** = [Points earned by candidate/total given points] x 100

- If a question is marked as "Disqualifier" and the applicant's answer does not meet the desired result, the applicant will be automatically disqualified for failing to meet the required minimum. This is regardless of whether they meet other question requirements successfully. Once an applicant fails a "Disqualified" question, they are disqualified from the recruiting process.

  In this example below, the question is marked as a **Disqualifier**. It is not a required field to complete. For any applicant who answers the question incorrectly, their application will be automatically disqualified, even if other questions are asked and those questions are answered correctly.



- If there are 3 questions and Hiring Manager chooses the Weight criteria and sets each question to weigh 100 and enters a Required Score of 300, this means the applicant must reach the required Total Score of 300. Anything below that would result in an application being automatically Disqualified.

  Here is an example of how this would look in the set up.

- If there are 4 questions and the Hiring Manager chooses different weight criteria for each question, enters a Required Score (of the Hiring Manager's choosing) and the applicant meets the requirement, the candidate's application continues through the recruiting process.

  Here is an example of how this would look in the set up.

- ➢ **Required Minimum Score** = 40 | The number of points that the Hiring Manager entered to pass the Pre-Screening Assessment. Reminder, this is any number that the Hiring Manager deems is appropriate.

- ➢ **Candidate Score** = 50 Points

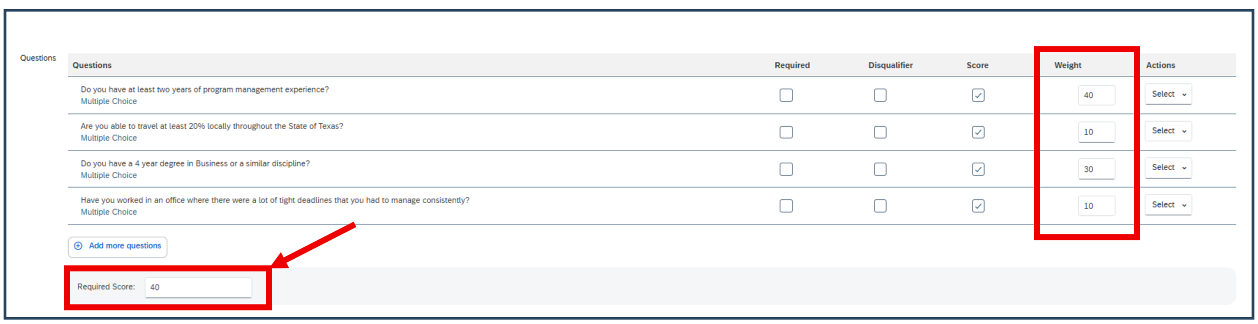
  - They get the first two questions correct.

  - They do not get the correct answer on the last two questions.

- ➢ **Result** = Candidate passes the Pre-Assessment Screening phase and their application advances through the pipeline and the recruiting process.

- In the same question scenario - If there are 4 questions and the Hiring Manager chooses different weight criteria for each question, enters a Required Score (of the Hiring Manager's choosing) and the applicant doesn't meet the requirement, the candidate's application is disqualified from the Pre-Screening process.

  Here is an example of how this would look in the set up.



- ➢ **Required Minimum Score** = 40 | The number of points that the Hiring Manager entered to pass the Pre-Screening Assessment.

- ➢ **Candidate Score** = 20 Points

  - The candidate gets the second and last question correct earning them 20 Points.

  - The candidate does not get the correct answer on the first and third question, since they don't have at least two years of program management experience and the candidate doesn't have a 4-year degree in Business or a similar discipline. This results in zero points earned for these questions.

➢ **Result** = Candidate does not meet the Required Minimum Score of 40 points based on the criteria set by the Hiring Manager and is automatically Disqualified from the application process.

Disclaimer: For questions set up with a Multiple Choice, your "answer choices" need to always include a Yes and a No response. However, please note that the system will allow you to add two "answer choices" and indicate both a Yes correct answer. You should be aware that in this situation based on the logic of the Career Center platform, the candidate will be automatically **Disqualified** even though candidate responded with the correct answer.

An example of this is below.

Examples of Pre-Screening Questions

Required	Disqualifier	Score	Weight	Actions

Here are some general Free-Text questions that you can consider. Keep in mind your questions will vary depending on the specific role you are recruiting for.

- Can you describe yourself in three words?
- What do you know about our organization?
- Where do you see yourself in three years?
- What about this role interests you?

- What’s your ideal work environment?
- What are you looking for in your next role?

Sample disqualifying questions:

- Do you have at least two years of program management experience?
- Did you graduate from an accredited four-year college or university with a major in general business or accounting?
- Do you have a valid Texas Driver’s License?
- Do you meet the license and certification requirements for this position?
- Are you able to travel within the State of Texas at least 50% of the time for this position?

Here is another example of Pre-Screening Questions that were added to a Requisition. This illustration is for you to see how the set up will appear once all the steps have been completed. Your questions will vary depending on the questions you deem are vital to your unique role.

Notice the 3 components: Question, Required Score and question attributes.

Questions

Questions	Required	Disqualifier	Score	Weight	Actions
Did you graduate from an accredited four-year college or university (i.e., bachelor's degree) with major coursework in business administration, architectural construction methods, public administration, or related field?	☑	☐	☑	50.0	
Do you have at least 2 years of progressively responsible experience in the management of maintenance, housekeeping, food service, risk management, safety, security, or a related support-operation?	☑	☐	☑	50.0	
Did you graduate from an accredited two-year college (i.e., associate degree) with major coursework in business administration, architectural construction methods, public administration, or related field?	☑	☐	☑	50.0	
Do you have at least 4 years of progressively responsible experience in the management of maintenance, housekeeping, food service, risk management, safety, security, or a related support-operation?	☑	☐	☑	50.0	
Do you have at least 6 years of progressively responsible experience in the management of maintenance, housekeeping, food service, risk management, safety, security, or a related support operation?	☑	☐	☑	100.0	
Based on your previous responses, please explain how you meet the required "Initial Screening Criteria" of this position? * Note: The "Initial Screening Criteria" can be found in the job posting, and in the assessment questions above.	☑	☐	☐	0.0	
Does your application clearly reflect that you meet all the "Initial Screening Criteria" as asked in the previous questions- to be eligible for this position?	☑	☑	☐	0.0	

Required Score: 100.0

Tips, Reminders and Best Practices

Here are some general tips and best practices to consider when adding pre-assessment questions.

- **Amount of Pre-Assessment Questions**

  Be thoughtful in how many Pre-Assessment questions you add. Evaluate which ones are most important to be used to set yourself up for a more efficient overall candidate screening process.

- **Understanding of Pre-Assessment Structure Elements**

  Make sure you thoroughly understand the structural criteria elements of the Pre-Assessment section: Required, Disqualifier, Score, Weight and Required Score. This will ensure that you don't inadvertently disqualify a great applicant, because you did not set up the Pre-Assessment question correctly to meet your individual needs for the role.

  These definitions are below for your reference:

  - **Required**: If this box is checked, the candidate must answer the question before they are allowed to submit a job application. It is a mandatory field.

  - **Disqualifier**: If this box is checked and the candidate answers the question incorrectly, the Career Center will disqualify them from the job posting. They will appear on the candidate list, but they will be highlighted in pink. If you select the disqualifier option, make sure to enter the Correct answer in the answer key link which follows the question.

  - **Score**: If you want to rank your candidates based on how they answer the question, check this box. The questions with this checked will be used to determine the candidate's overall score, which can be used to sort the candidates in the candidate listing page.

> **Note**: The Score criteria element must be used in conjunction with the "weight" box.

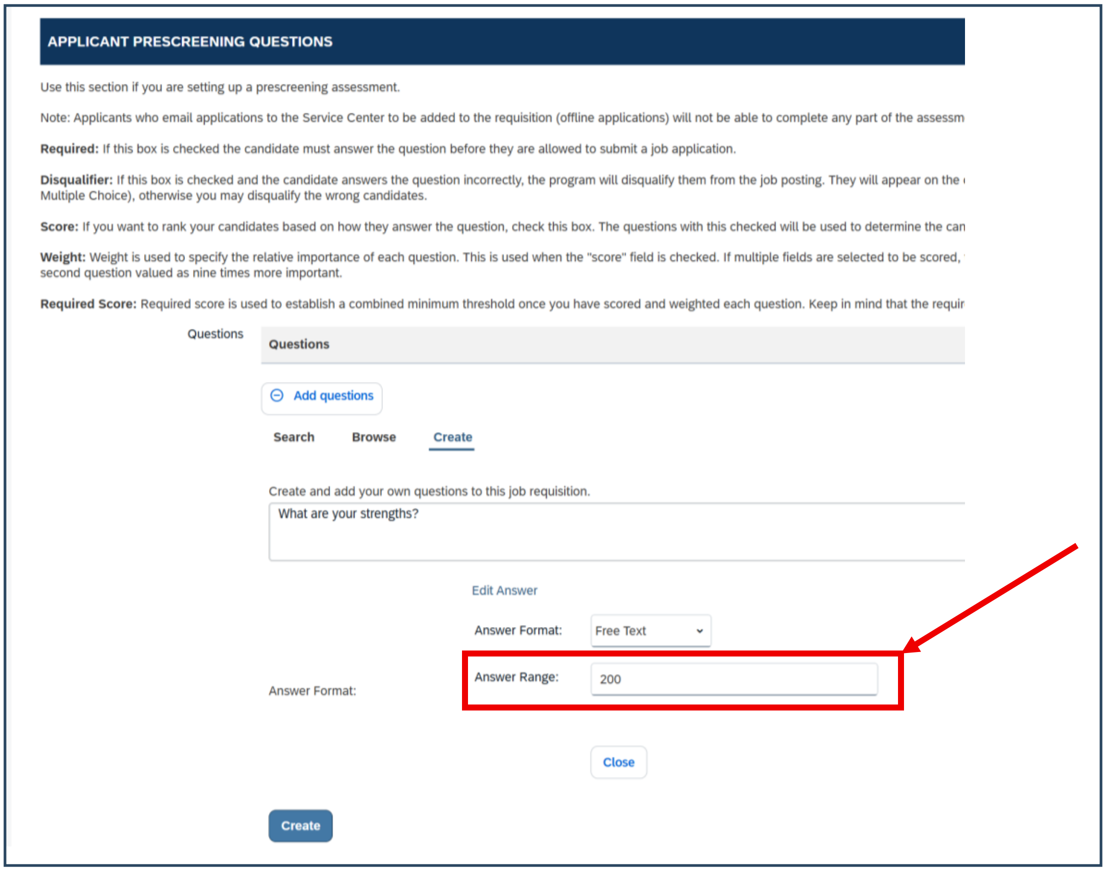
- **Weight**: Weight is used to specify the relative importance of each question. This is used when the "score" field is checked. If multiple fields are selected to be scored, then you can signify that certain questions are more important than others by allocating points between all the questions you would like to score. For example, if one question is rated 10 and another 90, the second question is valued as nine times more important.

> **Reminder**: Look at "Weight" as number of points. And the total Required Score does not have to equal to 100 points. It can be whatever value the Hiring Manager chooses.

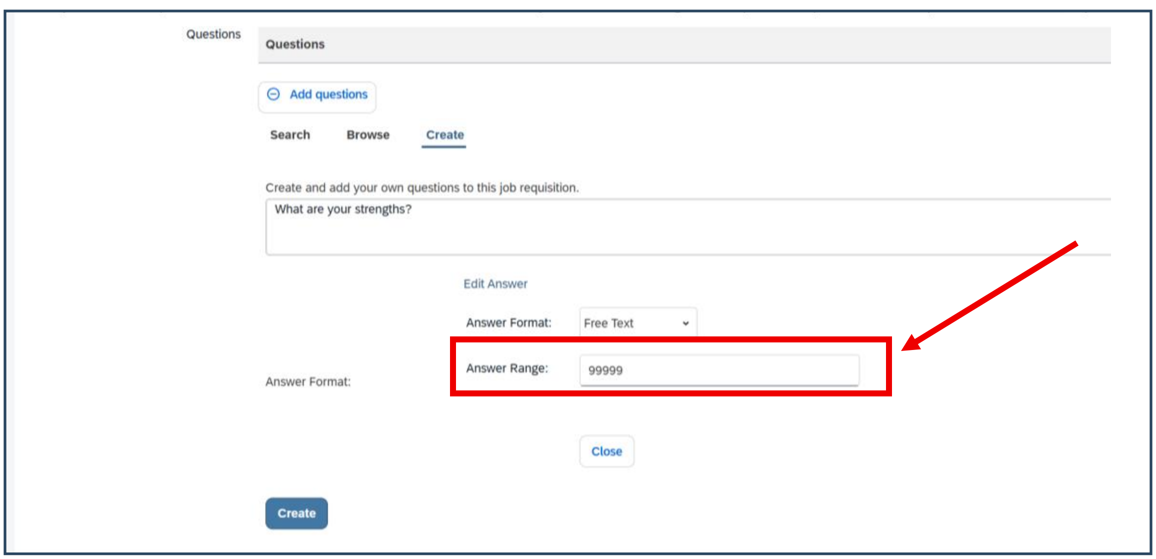
- **Free Text Question Set Up**

The Free Text question option is a very common and useful option for Hiring Managers for Assessment Questions. Here is some additional information about this option that you should be aware of and some tips to apply for best results.

When you use this option, the system will automatically default the character limit to **200** characters, as you see in the screen shot below. This will restrict the candidate's response to 200 characters or fewer. However, the Hiring Manager can extend that character limit up to a maximum of **99999** characters. While realistically that is more than enough characters for a candidate's response, you can adjust the limit to any number that you feel is appropriate.



In the example below, the Answer Range has been changed to the maximum 99999 characters.



> **Note**: Here are two things to be aware of:
>
> 1. Keep in mind that spaces are included in the character limit.
>
> 2. If the candidate's response exceeds the character limit that the Hiring Manager enters, the system will give them the following error message.
>
> "Answer size should be 99999 or less characters." *(if the character limit was set to 99999)*

- **Double-Check Your Pre-Assessment Questions**

  A good, best practice is to double-check all Pre-Assessment questions that you add to your Job Requisition to make sure that it will give you the results that you intend. Given the critical nature of the Pre-Assessment Questions, applying a layer of quality assurance to this task will help to ensure a positive result. The worst result is accidentally "kicking out" an ideal candidate from the screening process due to how the criteria was setup in the Pre-Assessment section. You might consider consulting with a peer and share your Pre-Assessment questions and criteria set up with them as a safety measure.

> **Note**: Given the serious nature of the "Disqualifier" setting, pay close attention to the questions that you've marked as a Disqualifier.

- **Question Answer Responses Include Both Yes and No Options**

  Tip and Reminder – make sure that your Answer Responses include both a Yes and a No response indicator to help ensure your candidates don't get inadvertently Disqualified.

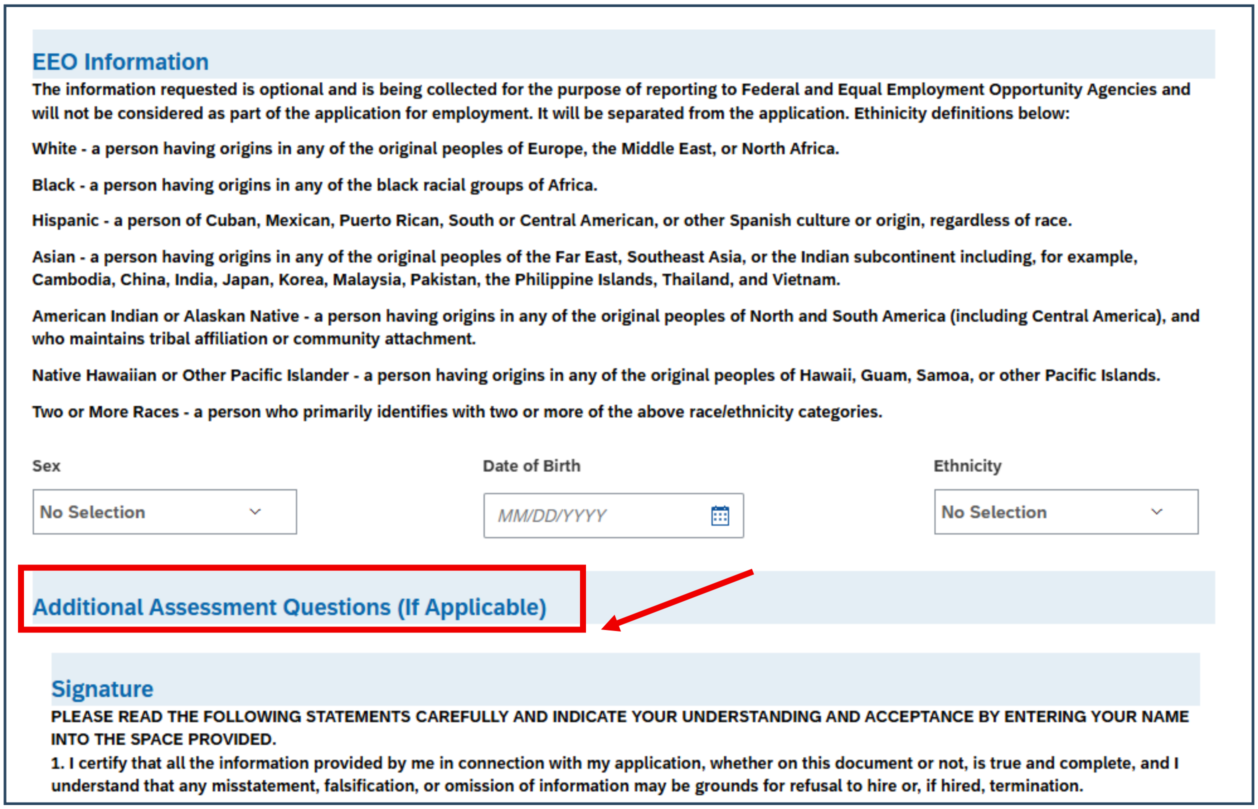
- **Review the Job Description Thoroughly**

  Hiring Manager should review the job description thoroughly when considering questions to be used for Pre-Screening purposes. Pay close attention to the content listed in the Knowledge, Skills and Abilities, any

Registration or License Requirements and Initial Selection Criteria to help you create effective Pre-Screening Assessment Questions. Applicants may apply and overlook some of these requirements and formulating Pre-Assessment questions around these factors may help to ensure you're moving forward with qualified applicants.

Where Do Pre-Assessment Q's Appear for Applicant

If Pre-Assessment Screening questions have been added, the applicant will see them at the very end of the Application process, specifically after the EEO Information section and before the Signature section as illustrated below.



EEO Information

The information requested is optional and is being collected for the purpose of reporting to Federal and Equal Employment Opportunity Agencies and will not be considered as part of the application for employment. It will be separated from the application. Ethnicity definitions below:

White - a person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

Black - a person having origins in any of the black racial groups of Africa.

Hispanic - a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.

Asian - a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

American Indian or Alaskan Native - a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.

Native Hawaiian or Other Pacific Islander - a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

Two or More Races - a person who primarily identifies with two or more of the above race/ethnicity categories.

Sex	Date of Birth	Ethnicity
No Selection	MM/DD/YYYY	No Selection

Additional Assessment Questions (If Applicable)

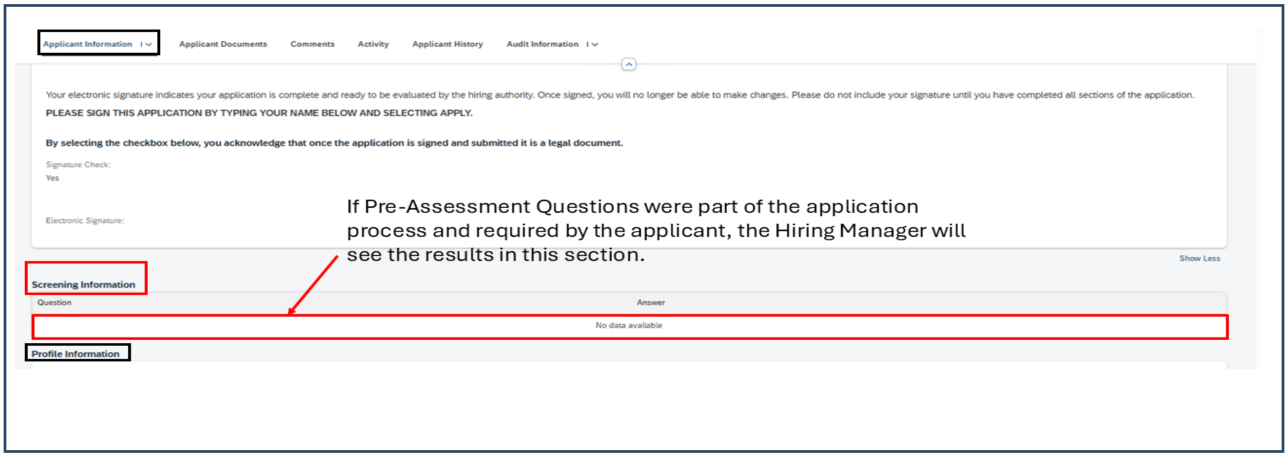
Signature

PLEASE READ THE FOLLOWING STATEMENTS CAREFULLY AND INDICATE YOUR UNDERSTANDING AND ACCEPTANCE BY ENTERING YOUR NAME INTO THE SPACE PROVIDED.

1. I certify that all the information provided by me in connection with my application, whether on this document or not, is true and complete, and I understand that any misstatement, falsification, or omission of information may be grounds for refusal to hire or, if hired, termination.

How To View Applicant's Responses to Pre-Assessment Q's

Recruiters and Hiring Managers can view an applicant's responses to the Pre-Assessment Screening questions in the Applicant Information section after the electronic signature in a section called Screening Information, right before the Candidate Profile Information.



Two examples of this are shown below.

Example #1

Screening Details

Are you able to provide proof of automobile coverage?	Yes
Do you have a valid Driver's License?	Yes
Do you have any of the following customer service experience?	More than one above
Have you previously been in a role where you were required to lift up to 50 lbs on a repetitive basis?	Yes
If "Yes" please designate heavier weight:	51 lbs

Example #2

Did you graduate from an accredited four-year college or university and a minimum of twelve months experience in construction trades to include HVAC, Plumbing, Framing, Engineering, performing general contracting services in residential or commercial building?	No
Do you hold an Associate degree AND at least 24 months of experience required?	No
Do you have at least 48 months of experience, without a degree?	Yes
Please explain how your experience meets the required "Initial Screening Criteria" of this position, based on your previous responses?	Over 35 yrs in and around construction
Did you make sure your application clearly shows that you meet all the "Initial Screening Criteria" required to be eligible for this position?	Yes

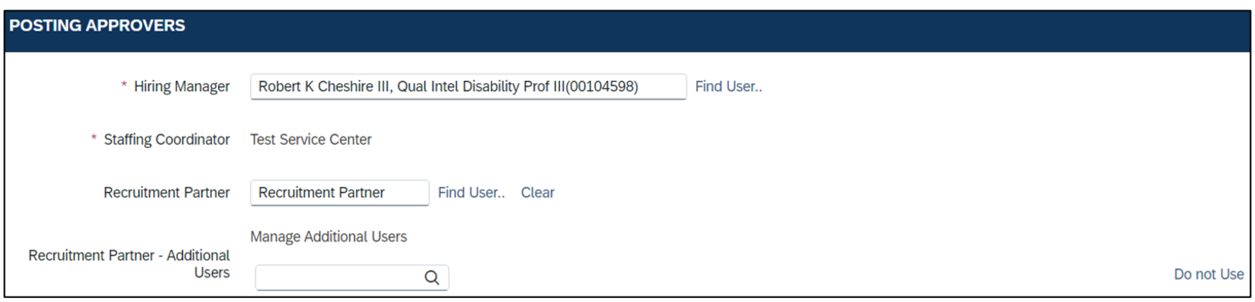
> **Note:** The Screening Details does not move with the candidate application if the application is forwarded to another requisition, even if the same Pre-Assessment Screening questions are on the other requisition. Remember, these questions are based at the requisition level. The candidate will need to be invited to apply to answer the questions on the forwarded to requisition

8.3.7 Interviewer Assessment Information

In this section Hiring Managers can optionally define the questions to be used during the interview by attaching a document with *Interview Questions* through *Attach a document* button.

8.3.8 Posting Approvers

Hiring Managers can **edit** the assigned approval team or add additional team members that should be able to access the Job Requisition.



> **Note:** The ***Recruitment Partner*** represents a new screening role. By selecting *Find User...* the Hiring Manager will see employees with the *Recruitment Partner* role assigned to their account (in **PeopleSoft**).

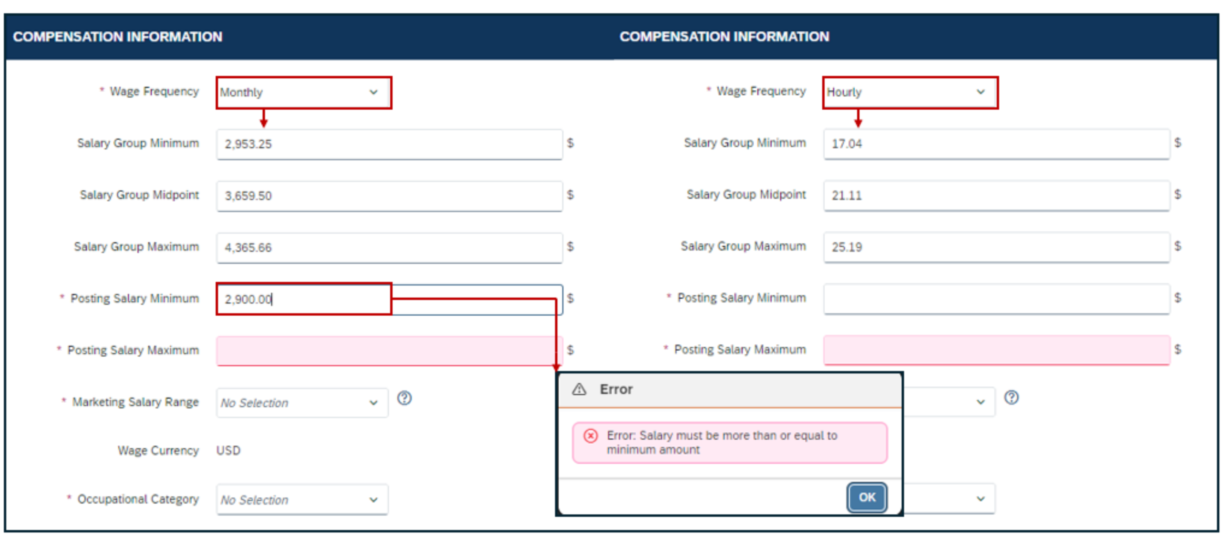
8.3.9 Posting Comments

Optional section for Hiring Managers to add comments for approvers of the next process steps.

8.3.10 Compensation Information

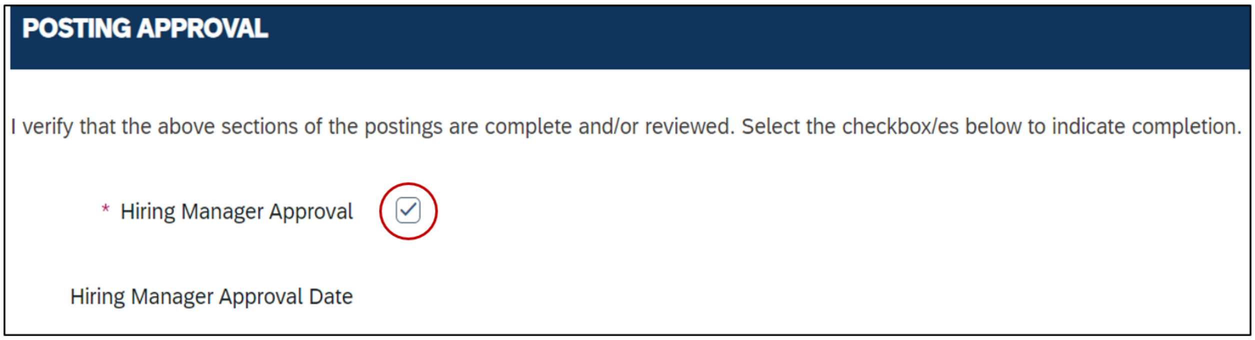
Hiring Managers will define minimum and maximum posting salary values and if they want to post them as a monthly or hourly rate values (*Wage Frequency*). The *Salary Group Minimum, Salary Group Midpoint* and *Salary Group Maximum* will be prepopulated based on information in the position details. The fields *Posting Salary Minimum*, *Posting Salary Maximum*, *Marketing Salary Range* and *Occupational Category* are to be maintained by the Hiring Manager.

> **Note:** The system will only allow *Posting Salary Minimum* and *Maximum* values in between the pre-set *Salary Groups*. It will **not allow** the Hiring Manager to manually change those group range values.



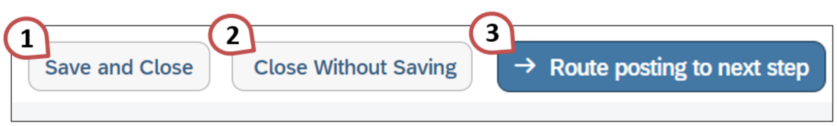
8.3.11 Posting Approval

The last section of the JR form is where Hiring Managers need to mark the checkbox to indicate their approval of the information in the form. Some forms require additional checkboxes to be marked and confirmed by the Hiring Manager before the form can be send to next approver step.

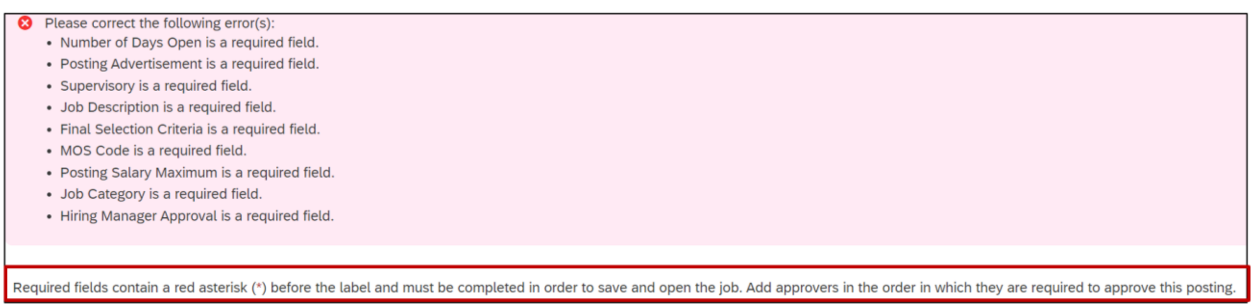


Afterwards, the Hiring Manager will have the options to click on:

1. Save and Close button: To save the requisition without routing it to the next approver step right away and continue at a later point in time.
2. Close Without Saving button: Close the form without saving it.
3. Route posting to next step button.



Note: The system will not save or route the posting to the next step if there are fields marked with a red asterisk (*) that are still open to be filled.



8.4 Approving Job Postings

8.4.1 Approval: Hiring Manager

To approve the JP, the Hiring Manager should:

1. Select the relevant JP on the home page by selecting the *Approvals* card itself. If more than one Approval is pending, select *View All* to see and select different pending approvals.

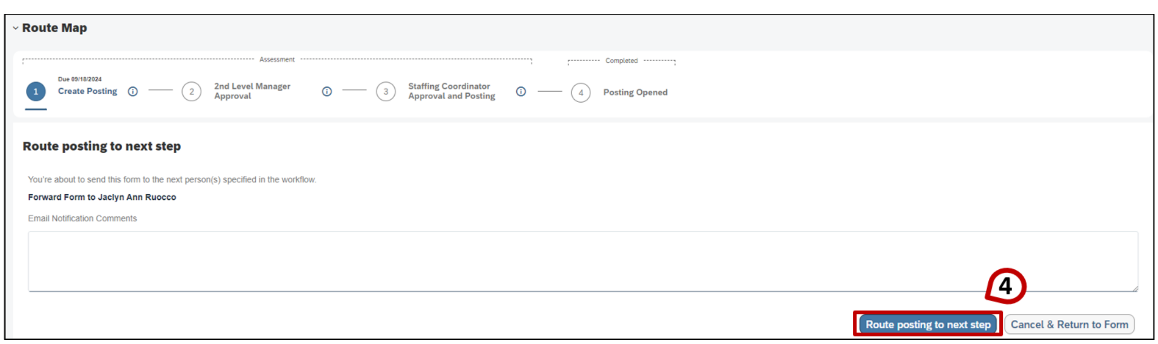
   

2. Review the information and add all the additional information required. Further information: [8.3.1 Update Job Requisition Forms](#).

3. When finished reviewing, click on the *Route posting to next step* button. Optionally, it can be *saved and closed* to be finalize later or *closed without saving*.

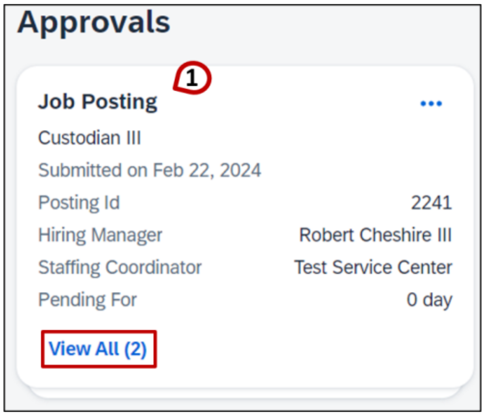
4. The next approver step in the route map will be the Second Level Manager. Hiring Managers can enter an email notification comment and click on the *Route posting to next step* button to send it to the Second Level Manager.

8.4.2 Approval: Second Level Manager

To approve the JP, the Second Level Manager should:

1. Go to the JP approval card on the home page and select the *Approval Card* itself. If more than one approval is pending, select *View All* and select the relevant card.



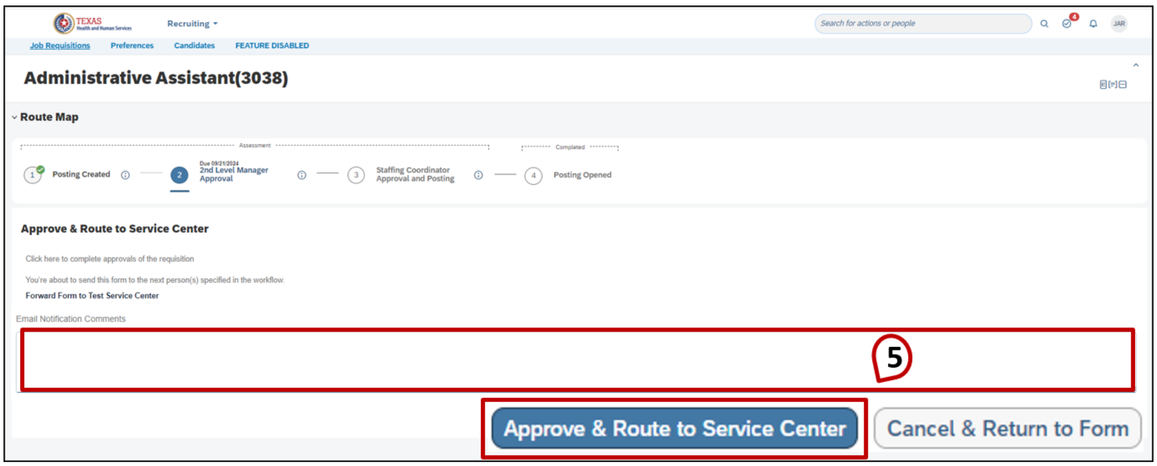
2. Review the data which was previously added by the Hiring Manager and add/modify/correct any information considered as relevant. The Second Level Manager has the same field permissions as the Hiring Manager, both can edit the same fields. Fields marked with a red asterisk (*****) need to be filled to be able to proceed. Further information: 8.3.1 Update Job Requisition Forms – various sections.

3. **Posting Approval:** Second Level Managers need to approve the reviewed information based on the different sections in the posting form (**if** not already approved by the Hiring Manager). Clicking on Approve & Route to Service Center indicates completeness and approval.

> **Note**: Second Level Managers are not permitted to modify the checked Hiring Manager Approval box.

4. When finished with reviewing, Second Level Managers can click on the *Approve & Route to Service Center* button. This will initiate the next level approval process in the *Route Map* and the form will pass through to this final stage of the JR workflow. Second Level Managers can also send the form back to the Hiring Manager by clicking on the *Deny & Send to Previous Step* button if there was missing data detected.

5. The JR will be sent to the next step, where the owner is the Staffing Coordinator from the Service Center. Second Level Managers have the option to enter an email notification comment and then click on the *Approve & Route to Service Center* button to send it to the Service Center.



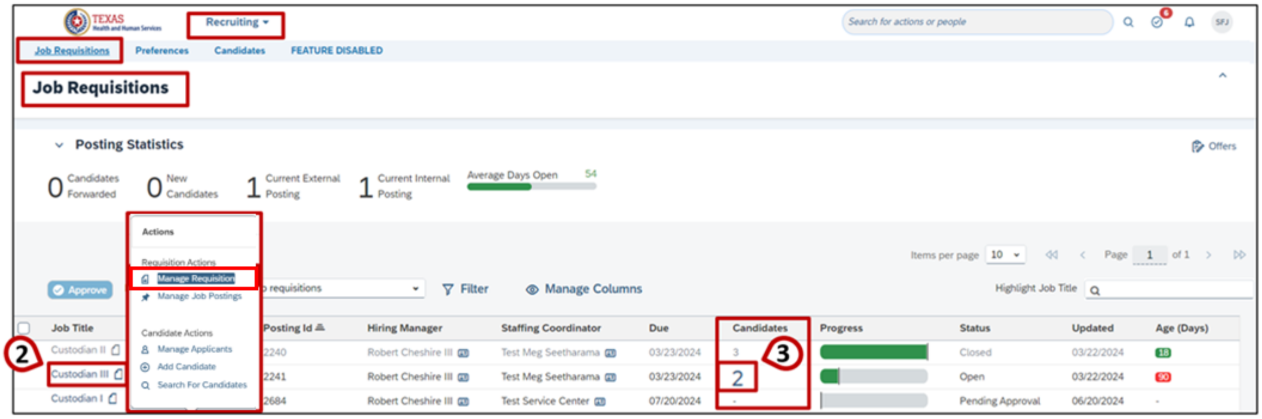
The *Service Center* will need to approve the last step of the process before the JP will be officially created and open for applications of internal and external applicants via the internal and external *Career Centers*.

8.5 Managing Job Applications

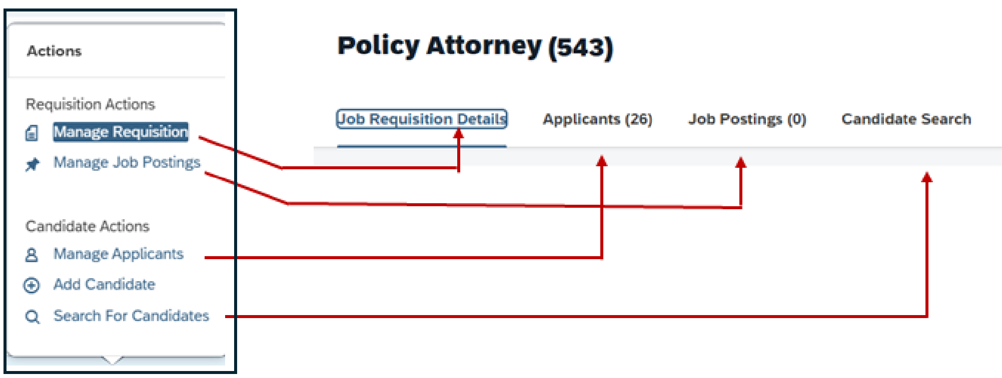
8.5.1 Job Posting Navigation

To navigate through a JP, Hiring Managers should:

1. Use a way to navigate to the **Recruiting** page (e.g. via the home menu). Further Information: 7.1.1 Navigation Menu and 7.1.2 Quick Actions.
2. **Hover** over the relevant job posting. Select *Manage Requisition* in the ***Action*** menu or the click on the *Job Title* itself to jump to the Details of a JR.
3. If you want to navigate directly to the Candidate Workbench (Candidate sub-tab of a JR), click on the *number of candidates* of a specific JR in the table column *Candidates*.



The main JR page header will show the position title and code. You will see new sub-tabs appear as shown below, consisting of: *Job Requisition Details*, *Applicants*, *Job Postings*, *Candidate Search*. These sub-tabs are also directly reached via the Action menu that comes up by hovering over a job title and select as in step **2**.



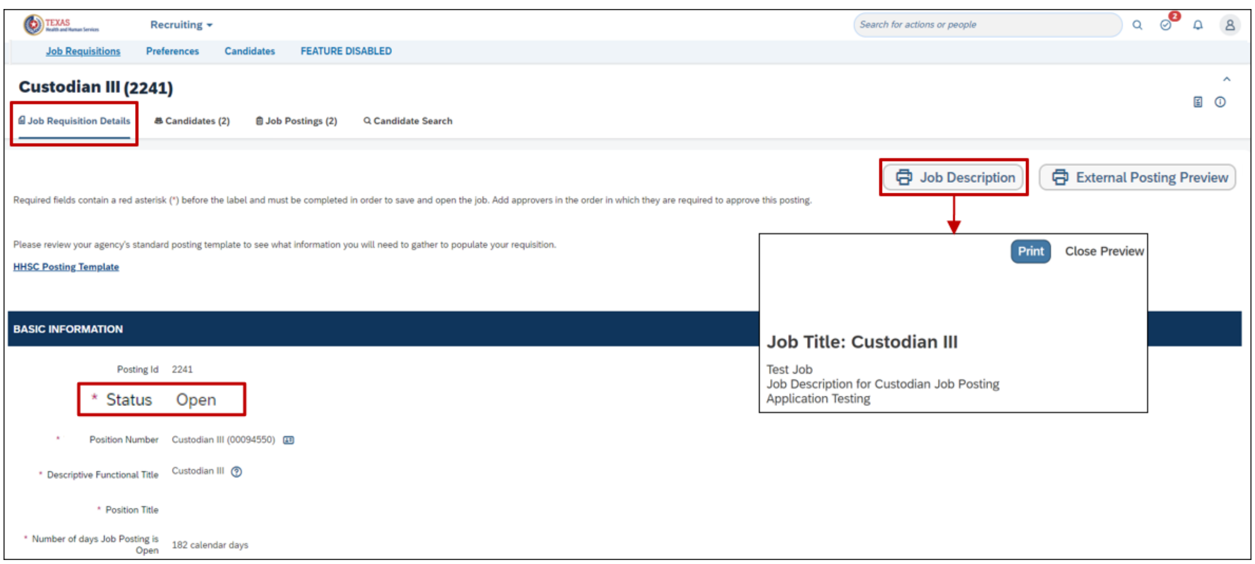
Note: As a reminder, only the HR Professional role will see the Search for Candidates and Candidate Search functionality.

8.5.2 Job Requisition Details sub-tab

In this section Hiring Managers will review the JP information which was updated and approved previously (further Information: 8.3.1 Update Job Requisition Forms). They can view the **internal** job description through the *Job Description* button if desired. The *External Posting Preview* will **not** show any information for Hiring Managers, only for Staffing Coordinators (from the ***HR Recruiting*** team).

Note: The *Status* under the Basic Information section should now be set to *Open* for the posted Job. It will remain in *Open* status until the last employee is hired as per the count in the *Number of Openings* field. To update the *Number of Openings* field value after a JP has been created, please contact a Staffing Coordinator or HR Professional user (admin with extended permissions in the system).

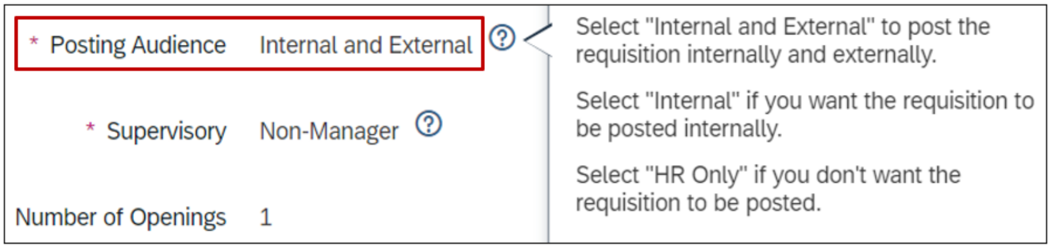
- If the JP stays in *Open* status without being utilized, it will automatically get changed to the status *Closed* after 60 days of inactivity.
- Optionally, the JP can be cancelled before 60 days pass. For early cancellations of JPs, Hiring Managers should contact a SC who has extended system permissions.
- A JP itself is created separately from the internal and external posting on the *Career Center*, its status will remain on *Open* even if the posting date for the internal and external posting might expire (**B** and **C** in next Job Postings sub-tab chapter) as the start and end dates of the JPs tab are independent of the JR form itself.

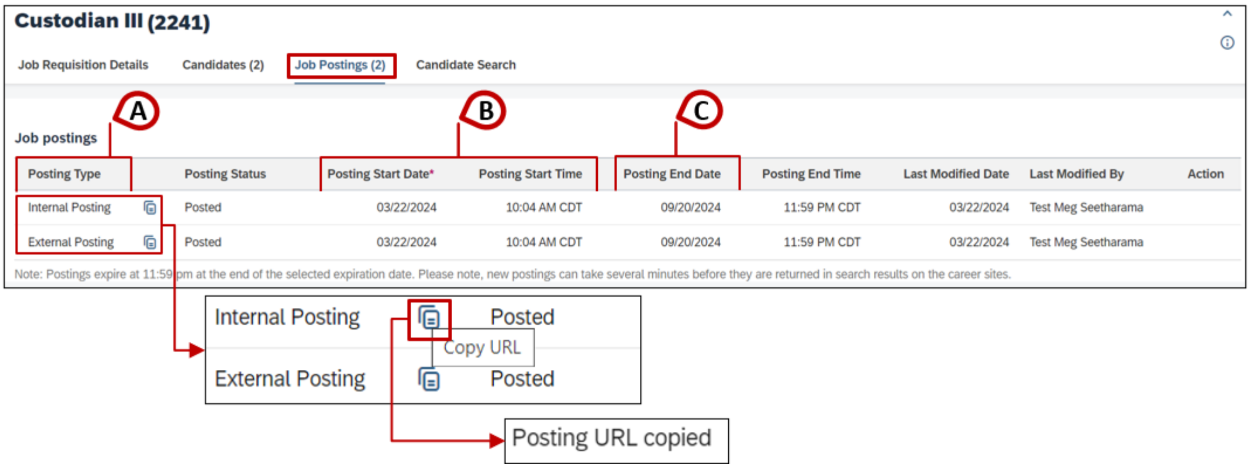


8.5.3 Job Postings sub-tab

To reach potential candidates, created JPs get published and can be found on the *Internal Career Center* search and on the *External Career Center* for the State of

Texas. The *Job Postings* sub-tab of the main *Job Requisitions* tab displays the links and durations of those postings.





A. **Posting Type**: This information depends on the information entered in the *Posting Audience* field when the Hiring Manager filled out the JP Form. By selecting the Copy URL button next to the posting types, the URL for the JP site will be copied automatically, ready to be pasted. There are two posting types described above:

   - Internal Posting: Published on the *Internal Career Center*, open for job searches.
   - External Posting: Published in the *External Career Center* for the State of Texas.

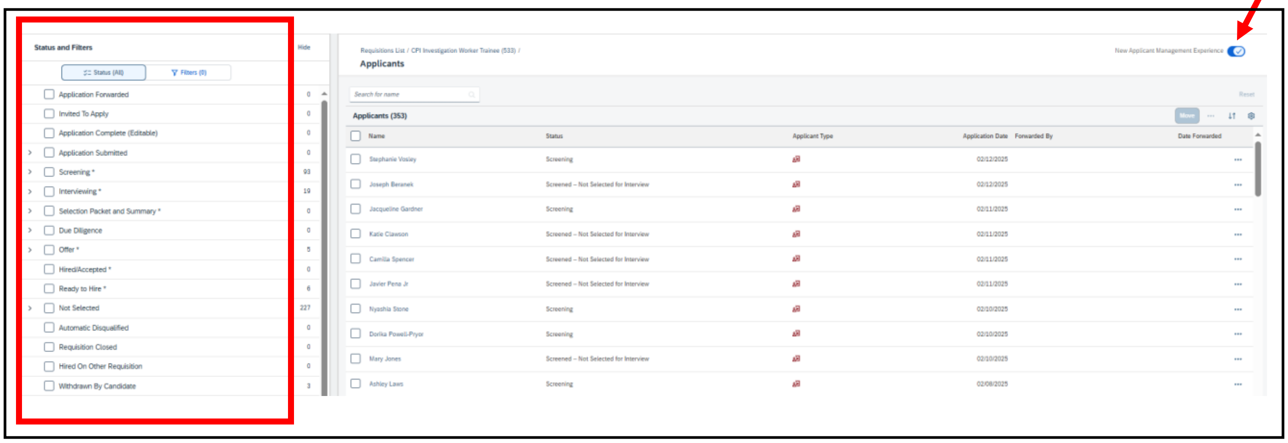
B. **Posting Start Date and Time**: Refers to the internal JP approval date. Jobs get post automatically after the *JR Form* has been fully approved.

C. **Posting End Date**: This date is automatically filled depending on the option selected during the JR approval updates (refer [8.3.1 Update Job Requisition Forms]) in the field *Number of days Job Posting is Open*.

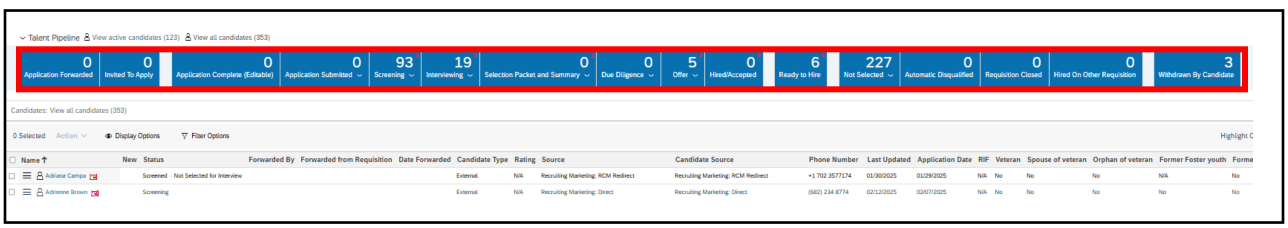
8.5.4 Candidates sub-tab (Talent Pipeline View)

In the Career Center there are currently two different views of the Talent Pipeline: New Applicant Management Experience (which displays the Talent Pipeline stages on the left-hand side of the page) and a legacy version (which displays the Talent Pipeline stages across the top of the page.)

New Applicant Management Experience



Legacy View (Toggle button is off for New Applicant Management Experience)



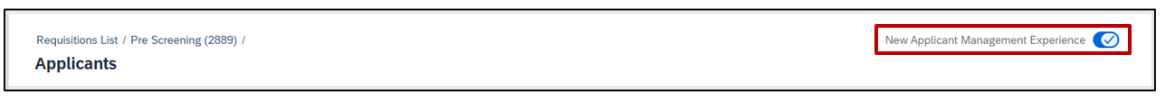
All users should be using the New Applicant Management Experience View for all recruiting activities, unless you need to mass print applicant documents like resumes, cover letters and applications. This can ONLY be done in the legacy view, which requires that the New Applicant Management Experience button is turned off.

> **Note**: New users of the Career Center are defaulting to the legacy view. They should ensure that when looking at Candidate data, the New Applicant Management Experience View is enabled.

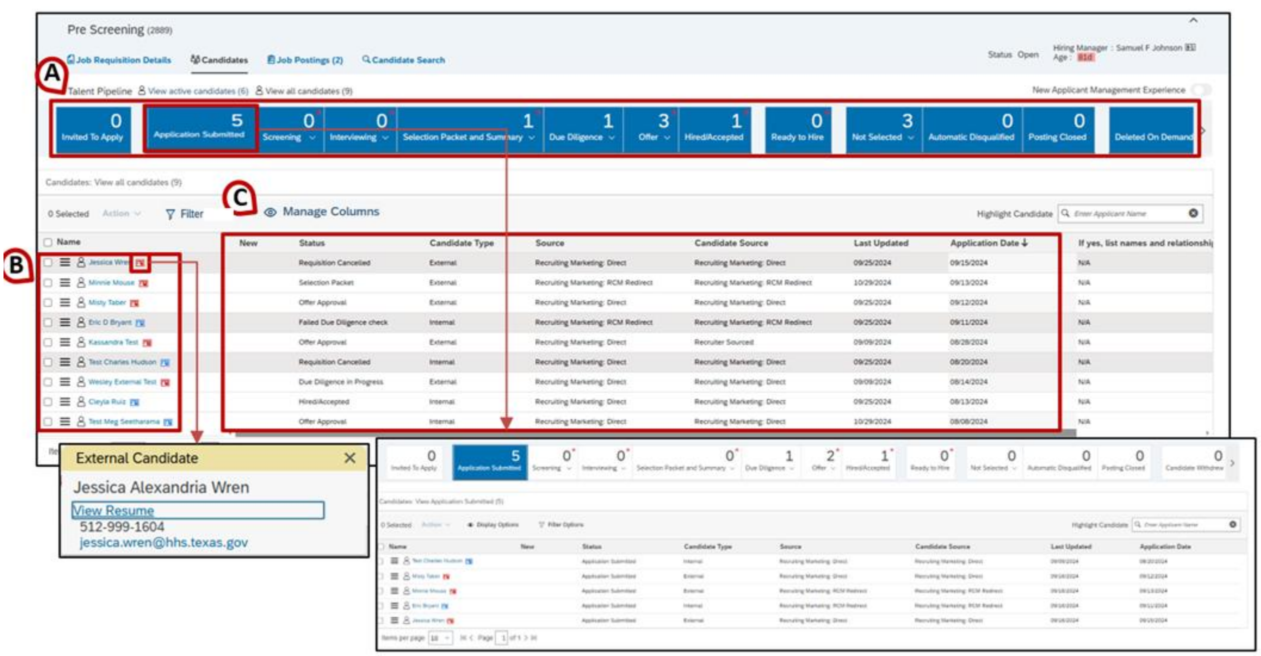
Disclaimer: When users access the legacy view, they need to remember to toggle back to the New Applicant Management Experience view. This can be done by enabling the New Applicant Management Experience button.

1. Click on an open requisition and select the *Candidates*.

2. Switch the New Applicant Management Experience off.



The Screen demonstrates the legacy Talent Pipeline layout.



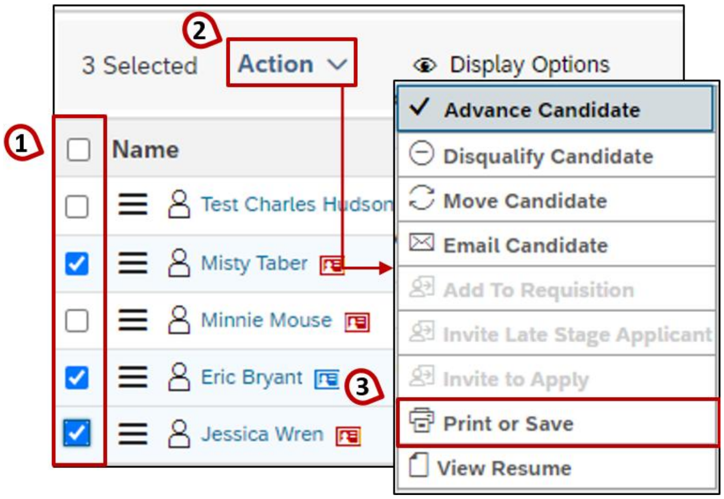
A. **Talent Pipeline**: In this pipeline you can see how many candidates are in which step of the requisition. By clicking on the step, you can see which candidates are in this stage.

B. **Candidates**: Here you can see the Candidates that have applied to this job requisition. By clicking on the View more information button (a profile card icon), you will be able to open their resumes and view their contact details.

C. **Application status**: The next fields show the information about the candidate's application status. There are New, Status, Candidate Type, Source, Candidate Source, Last Updated and Application Date columns.

8.5.4.1 Print Resumes/Application Documents

> **Note:** The task of printing applicant documents can only be done in the Talent Pipeline View (New Applicant Experience switched off): printing resumes, cover letters and applications of applicants. The Applicant Management tool allows you to download documents – Resume and Cover Letters, of up to 500 selected applicants.
>
> **Disclaimer:** This view will NOT allow you to print offline applications. To identify an offline applicant, view the Talent Pipeline Stage: Application Submitted/Emailed Application Submitted sub-stage. When selecting this stage, you can see the list of applicants who applied offline. To print their information, go to the applicant's Application Information or Applicant Documents/Other Documents sections.



1. Check the corresponding checkboxes for the candidate or candidates that you need to print resumes, cover letter or application for. Or check the Select All checkbox if you need to print those materials for all candidates.
2. Click on Actions menu, the selected action will affect all the selected candidates.
3. To mass print the resumes, click on the *Print or Save* action.
4. A dialog pop-up box, Mass Print, will open. Select one main printing option:
   A. Candidate-entered application info with the option to include the following by checking their checkbox.
      a Cover Letter (Optional)
      b Resume
   B. All Attachments with the option to include the following by checking their checkbox.
      a. Cover Letter (Optional)
      b. Candidate-Uploaded Attachments
      c. Resume
      d. Internally-Uploaded Attachments
   C. All application info with the option to include the following by checking their checkbox.
      a. Cover Letter (Optional)
      b. Resume
      c. Historical Results

d. Left Column

(1) Application

(2) Assessment Results

(3) Background Elements

e. Right Column

(1) Comments

(2) Interviewers

(3) Correspondence

(4) Offer Letter

(5) BGI Status

(6) Onboarding

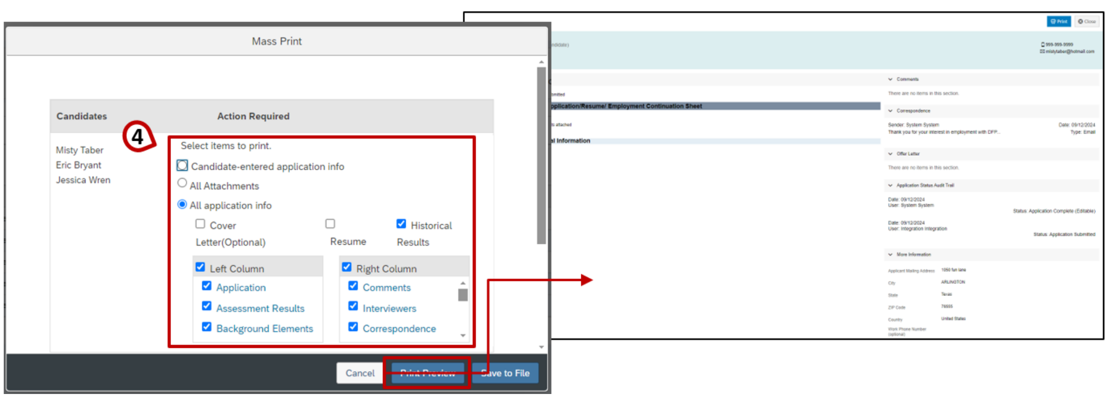
(7) App Status Audit Trail

(8) Tags

(9) Candidate Information

(10) Employee Referral Information

(11) Background Check Packages

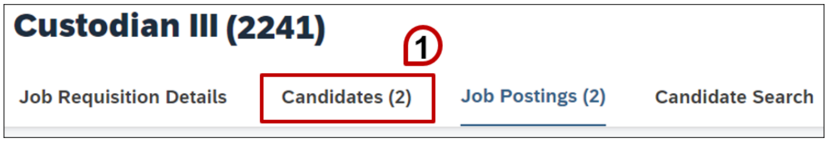


5. Once you have selected the files to be printed, click on *Print Preview* or *Save File*.

8.5.5 Candidates sub-tab (New Applicant Management Experience)

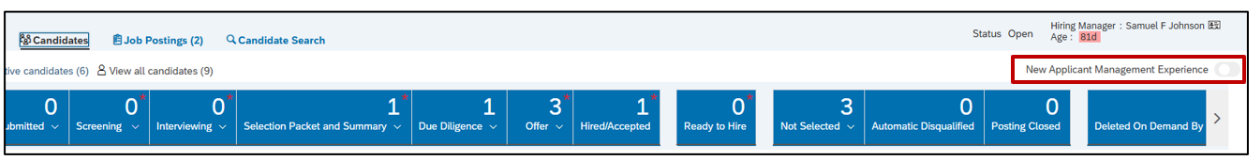
In this sub-tab, the Hiring Manager can manage applications by advancing, holding, tracking the progress, or disqualifying them.

1. Switch from the *Job Postings* to the *Candidates* sub-tab



Disclaimer: The *New Applicant Management Experience* design was implemented with the latest platform update and is considered the standard view of the Talent Pipeline and candidate data. Compared to the legacy view (New Applicant Management Experience View is turned off), it streamlines the application process and provides an improved user experience.

Note: System users that see the default *Legacy Candidate Workbench* have the individual option to switch their page design to the *Latest Applicant Workbench* by clicking on the New Applicant Management Experience checkbox (looks like a toggle switch) and vice versa. The system remembers the set display design for your next connection.



Applicant Workbench: The recruiting process flow is based on the below statuses and their sub-statuses of the (new) *Applicant Workbench*.

- Invited to Apply
- Online Application Submitted / Offline Application Submitted
  - Online Application Submitted
  - Emailed Application Submitted
- Screening *
  - Screening *
  - Initial Screening Criteria ISC

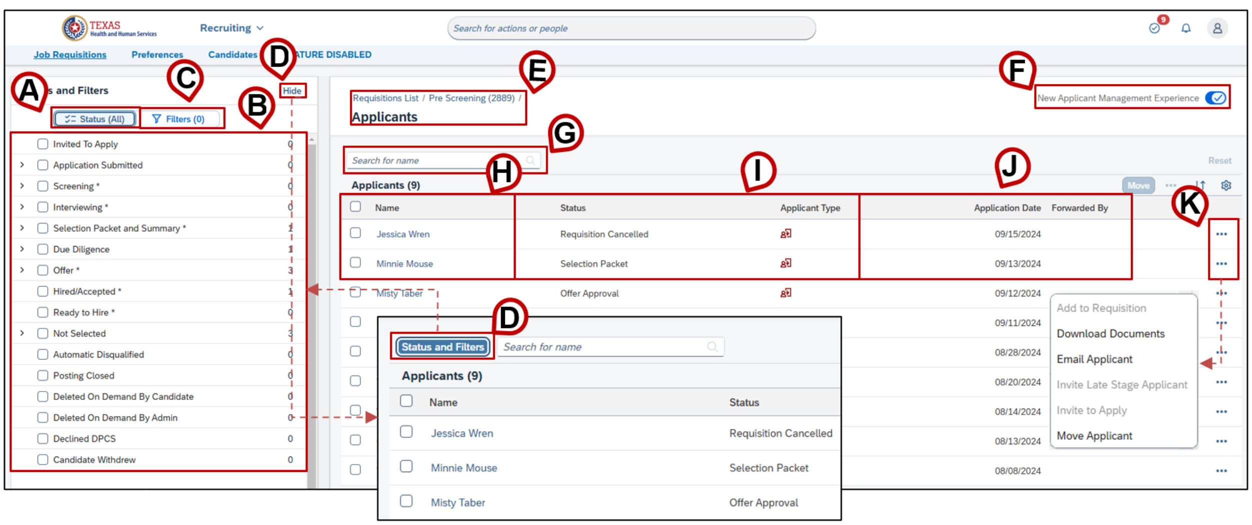
- ISC/PF (Preferred Criteria)

- Interviewing *
  - Selected for Interview
  - Scheduling Interview *
  - Interview Complete *
  - References Check
  - Conditional Offer Letter – HHSC & DSHS
- Selection Packet and Summary *
  - Selection Packet *
  - Selection Summary Form *
  - Conditional Offer Letter - DFPS
- Due Diligence
  - Due Diligence in Progress
- Offer *
  - Offer Approval *
  - Offer Approval Complete *
  - Create Offer Letter
  - Offer Accepted
  - Offer Decline
  - Reference Check - DFPS
- Hired/Accepted *
- Ready to Hire *
- Not Selected
  - Disqualified – No Show
  - Failed Due Diligence check
  - Unfavorable Reference Check
  - Failed Pre-Screening
  - Candidate Non-Responsive or Declined Offer
  - Requisition Cancelled

- Screened – Not Selected for Interview
- Applicant Declined Interview
- No Show for Interview
- Interviewed – Not Selected

- Automatic Disqualified
- Posting Closed
- Candidate Withdrew

> **Note**: When the Career Center was launched in December 2024, the original 1st Pipeline stage was labeled as "Application Submitted." In January 2025, we relabeled the first pipeline status to Online Application Submitted for those who applied online and to "Offline Application Submitted" for those who applied offline. This change was made to help distinguish between the two types of applications. You may see the original labeling in some of the User Guide screenshots.



A. **Status (All) view**: *Status and Filters* sidebar set to *Status (All)*. Provides the option to filter the list of displayed applicants based on the status that their application is in (compare with the *Status* column in the applicant table). The number on the right side of each status indicates the number of applicants that are currently in each status.

B. **Statuses**: List of all configured (collapsed) statuses displayed vertically inside the left sidebar of the screen. Provides the option to filter the list of displayed applicants based on the status that their application is in [compare with **I** (*Status* column in the table)]. The number on the right side of each status indicates the *number of applicants* in each status.

C. **Filters**: Shows status of JP, the Hiring Manager name and JP age (since its creation).

D. **Hide – Status and Filters**: Option to hide the *Status and Filters* sidebar with the *Hide* button and when hidden, use the *Status and Filters* button to open the sidebar again.

E. **Quick Links and Header**: Breadcrumb trail that provides quick links to the general *Job Requisitions* list in Recruiting and *Job Requisition Details* sub-tab of the JR. The Header refers to the Applicants.

F. **Switch to Legacy Candidate Workbench**: New Applicant Management Experience checkbox to toggle between the legacy design of the *Candidate Workbench* and the latest design called *Applicant Workbench* now.

G. **Search for name**: Possibility to search for names to filter them in the list. When you enter a name, the list automatically filters and displays only matching characters in the list.

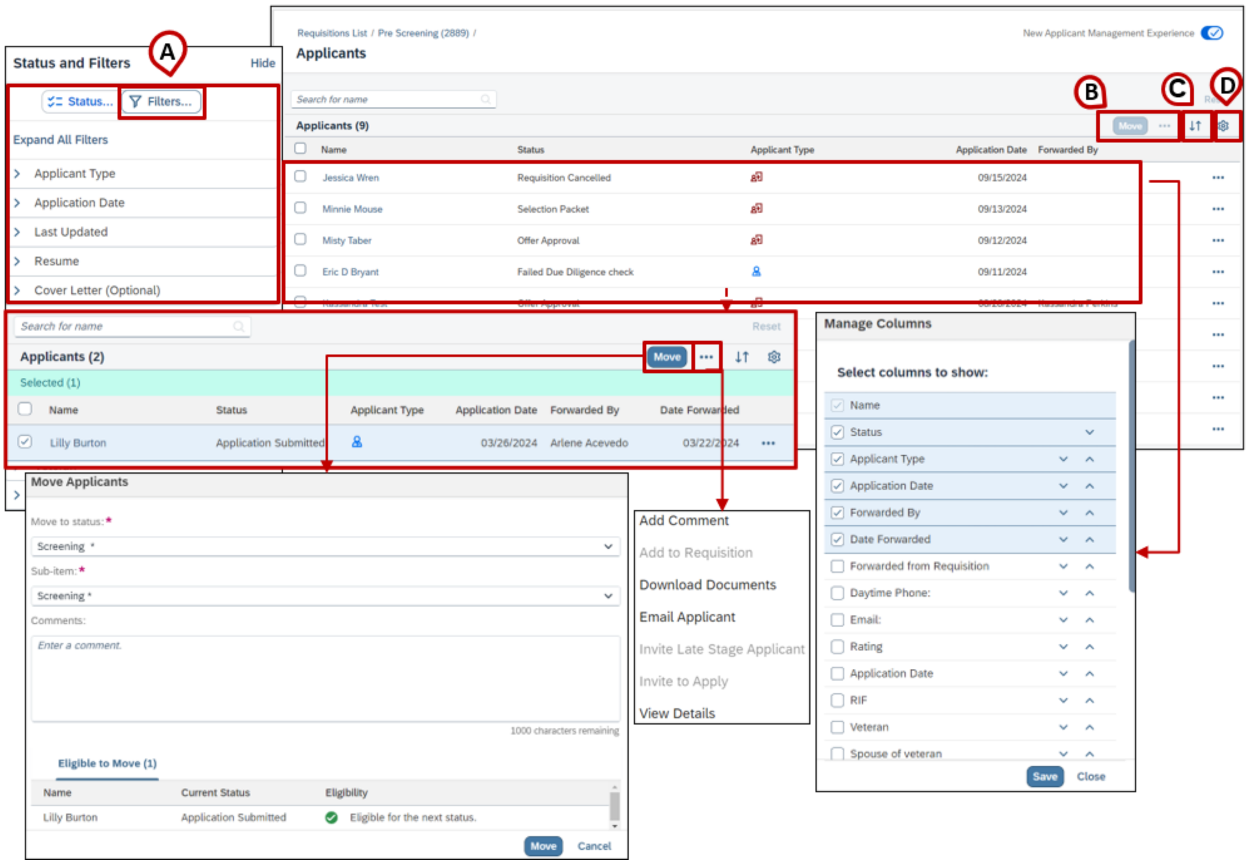
H. **Applicant Names**: Listing of applicant names, depending on the filtering and sorting.

I. **Status and Applicant Type**: The *Status* column portrays statuses of the applicants in the list. *Applicant Type* shows **internal** /**external** applicants by the bright blue colored icon for internal and dark red colored icon for external.

J. **Additional Information Columns**: More columns to display details about applicants in the list. The displayed columns are managed via the Settings button (a *cogwheel icon)* described on next page.

K. **Applicant Management Options**: With the Actions for the candidate button (three-dots) you have application-specific options like adding a comment, email the applicant or move an applicant.

The Move, More, Sort and Settings buttons are not available until you have selected at least one applicant. To use the Move button, More button, Sort button and Settings button that are above the table of applicants *click* on the checkbox beside an applicant name. A message generates, "**Selected**" with the number of selected applicants directly above the table of applicants.



A. **Filters view**: *Status and Filters* sidebar switched to *Filters* instead of *Status*. Provides the option to filter the list of displayed applicants based on available filter criteria from the applicant table columns (examples: Applicant Type, Application Date., Last Updated and more).

B. **Move and More**: Available buttons when at least one applicant from the list is selected. The *Move* button allows you to move applicants into other statuses of and sub-statuses of the Status pipeline. The *More* button opens application-specific options like *Adding* a *Comment*, *Email* the *Applicant* or *View* the *Details* about applications. The Status view *More* button has an option to move applicants, **this option is missing here**.

C. **Sort**: Option to sort the list of applicants based on various enabled columns (*Name*, *Status*, *Applicant Type* etc.) of the list/table in ascending or descending order.

D. **Settings**: Set the displayed columns of your applicant list via the Settings button.

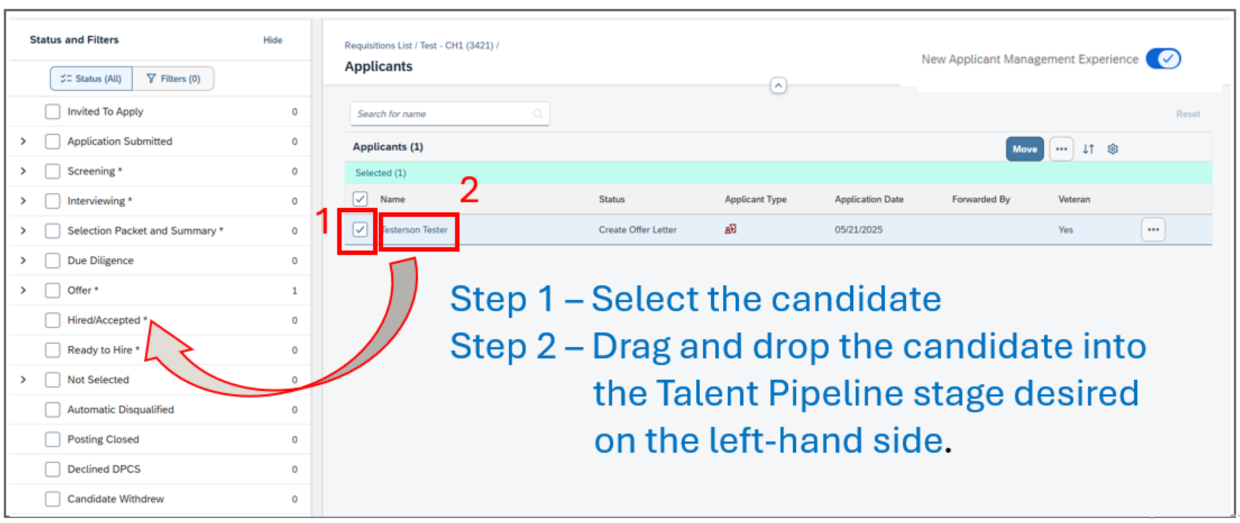
Drag & Drop Functionality

In addition to using the MOVE button to move candidates to the next Pipeline stage, when on the Applicants List View page the user can "Drag and Drop" a candidate straight to the Talent Pipeline stage on the left-hand side. An illustration of this is shown below.

The Drag and Drop functionality is performed in two easy steps.

Step 1 - The user would select the candidate.

Step 2 - Drag and drop the candidate into the Talent Pipeline stage desired.



> Note: If the user is moving multiple candidates at the same time to the next stage, the user would need to use the MOVE button option instead. The Drag & Drop functionality is only for single candidate moves.

8.5.6 Candidate Search sub-tab

The Candidate Search feature can be accessed through the general Candidates tab or the Candidate Search sub-tab under the JRs tab to find candidates specifically for a certain posting. For further information about aspects of the candidate search functionality: 8.1.3 Candidates. After reviewing the *Candidates* chapter, you can follow along with the example provided.

> Note: As a reminder, only the HR Professional role will see the Search for Candidates and Candidate Search functionality.

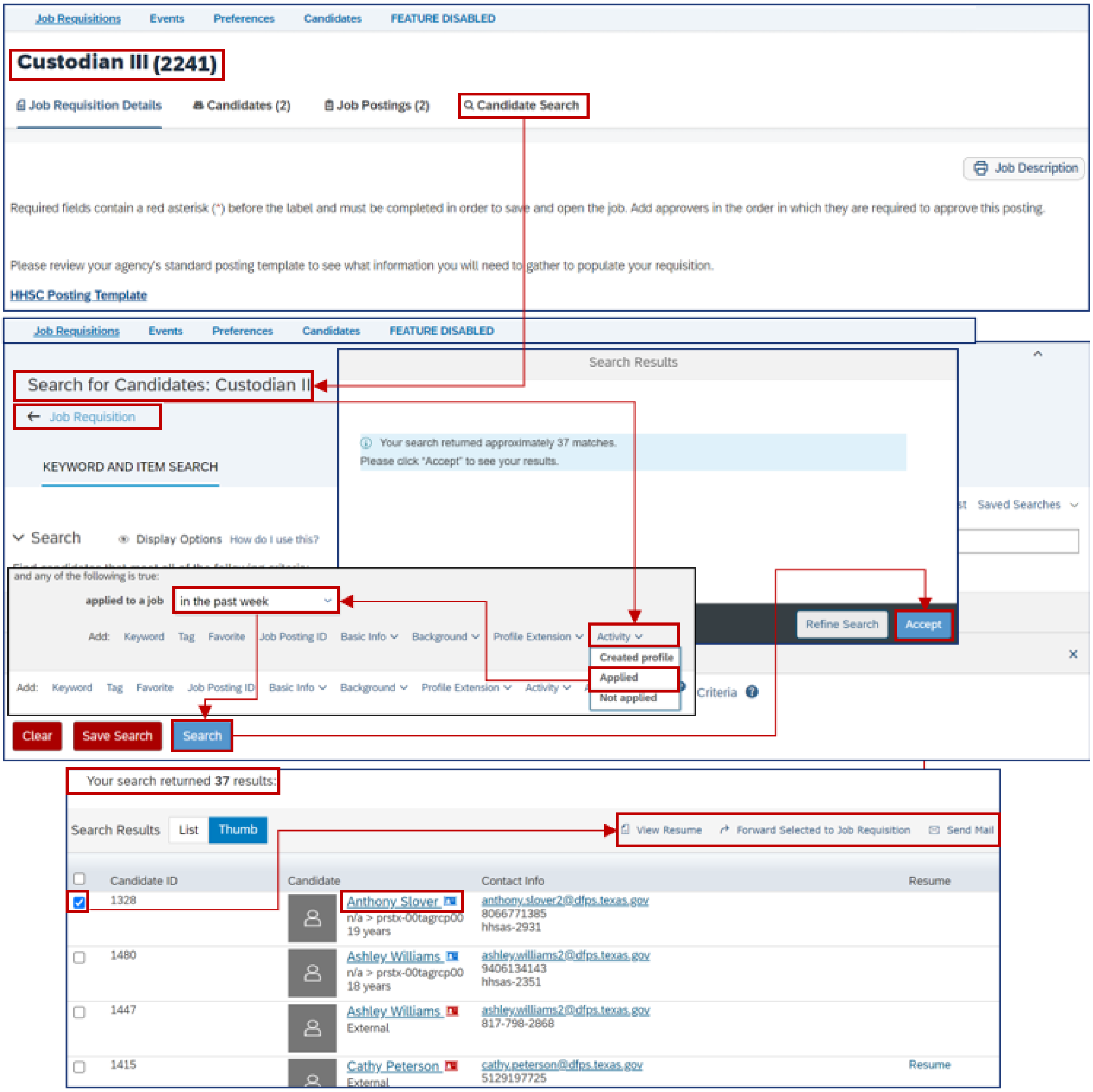
In this example, we have:

1. Clicked on a Job Title that allows for a specific candidate search, a Custodian III job title.
2. We now see the Candidate Search sub-tab and click on it.
3. Applied to a job in the past week option has been selected from that drop-down menu.
4. Added search criteria Activity with a sub-menu option of Applied.
5. The Search button was clicked.
6. A Search Results pop-up window generates with the message: Your search returned approximately 37 matches. Please click “Accept” to see your results.
7. The Accept button was clicked.
8. The 37 search results are displayed in a Thumb layout with candidates.
9. A checkbox for the first candidate was checked.
   We can:

   A. View Resume

   B. Forward Selected to Job Requisition

   C. Send Mail



8.6 Application Navigation

8.6.1 Online Application

This section shows how to access, review and update data of candidate applications. The *Application Area* section of **online** applications is shown in this chapter.

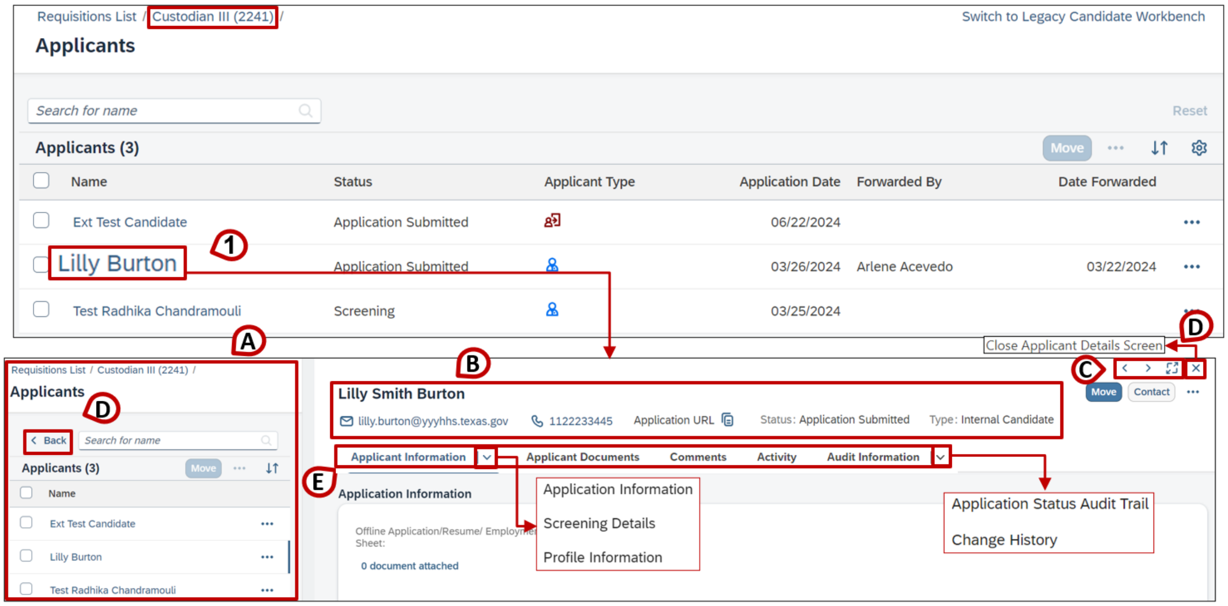
> **Note**: Main difference between **online** and **offline** applications is how candidates apply for JPs.

- **Offline applications** will be received as attached documents via email. You can access, view and print these documents in the applicant's Application Information and Applicant Documents/Other Documents areas.
- **Online applications** will be filled and submitted by candidates either through the *Internal Careers Site* or the *External Career Center* of State of Texas.

Other than **online** applicants, **offline** applicants will **not** fill the additional fields and questions of the JP when applying. When applying, **offline** applicants will provide their candidate information via documents (examples: Resume, Certifications or more) by email. Further information about the difference between those application types: 8.7.1 Application Information, letter C.

Hiring Managers can access an application by following these steps:

1. Navigate to the *Applicant Workbench* [further information: 8.5.4 Candidates sub-tab (Applicant Workbench)] of an open JP with active candidates. In the Applicants list, select an applicant name to open the respective *Application Area*.
2. The list of applicants will then be in the sidebar on the left side which still displays the breadcrumb trail (quick links) to the general *Requisition List* and the *JP name and code*. Here you can still manage applicants, select them via their *checkbox* and utilize the *Move* or the *More* button.



A. **Applicant Workbench sidebar**: Provides information about the JP and has the function to navigate back to previous pages via the breadcrumb trail in the *Recruiting* section. It lets you manage applicants via the applicant list in the sidebar.

B. **Basic Applicant Information**: Header of the *Application Area*. Displays the full applicant name and other basic information (email address, phone number, URL copy field) as well as the *Status* of the application and the *Applicant Type* (internal or external).

C. **Applicant Navigation and Screen Expand**: Part of the Toolbar. The first two buttons, Navigate to previous applicant and Navigate to next applicant, allow you to switch back and forth between the *Application Areas* of applicants from the *Applicants* list. The third button, Expand Applicant Details screen, is used to expand the screen by hiding the main dashboard and sidebar, only showing the *Basic Applicant Information* and *Application Area*.

D. **Close Application Details Screen/Back**: Two buttons with the same function which allows you toggle back to the previous *Applicant Workbench* page [further information: 8.5.4 Candidates sub-tab (Applicant Workbench)] and *Status Pipeline*.

E. **Application Area parts**:

- Application Information with the following sub-areas:
  - Application Information
  - Screening Information

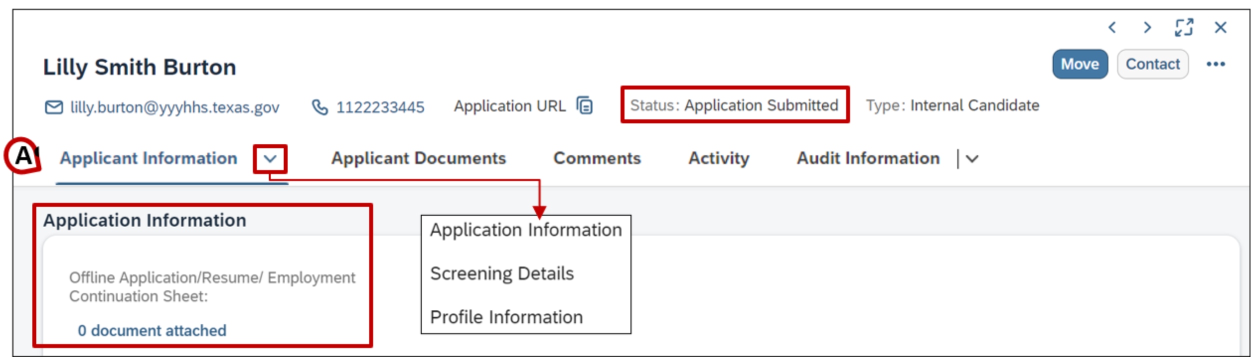
- Profile Information
- Resume and Documents
- Comments
- Activity
- Audit Information with the following sub-areas:
  - Application Status Audit Trail
  - Change History

This area will be explained further in the next chapter.

8.7 Application Area

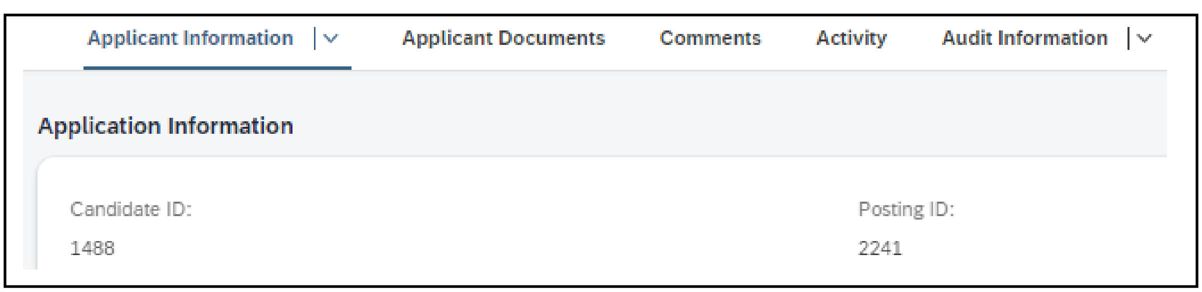
The **Hiring Manager** must document the attempt of obtaining a reference when they are unable to reach the reference.

8.7.1 Application Information

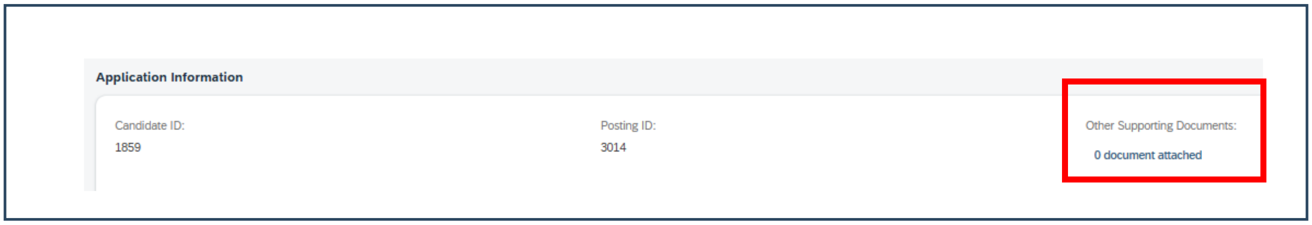


A. **Applicant Information** is the main section for all statuses. It will show and ask for more information around the application process when the applicant advances to the next statuses of the process.

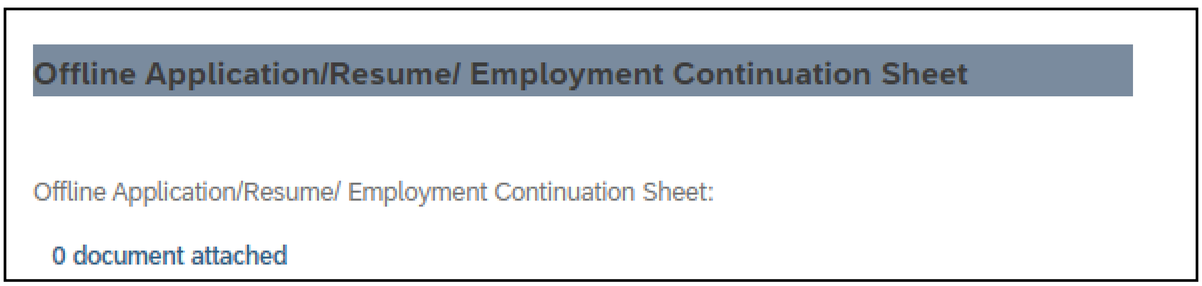
   In the **Application Submitted** status, the first is the *Application Information* sub-section which contains the Candidate ID and Posting ID numbers. This comes from the Candidate Application.



> **Note**: HR Professionals have access to be able to upload additional supporting documentation. This is available only for this role and their view is below showing the "**Other Supporting Documents**" section.



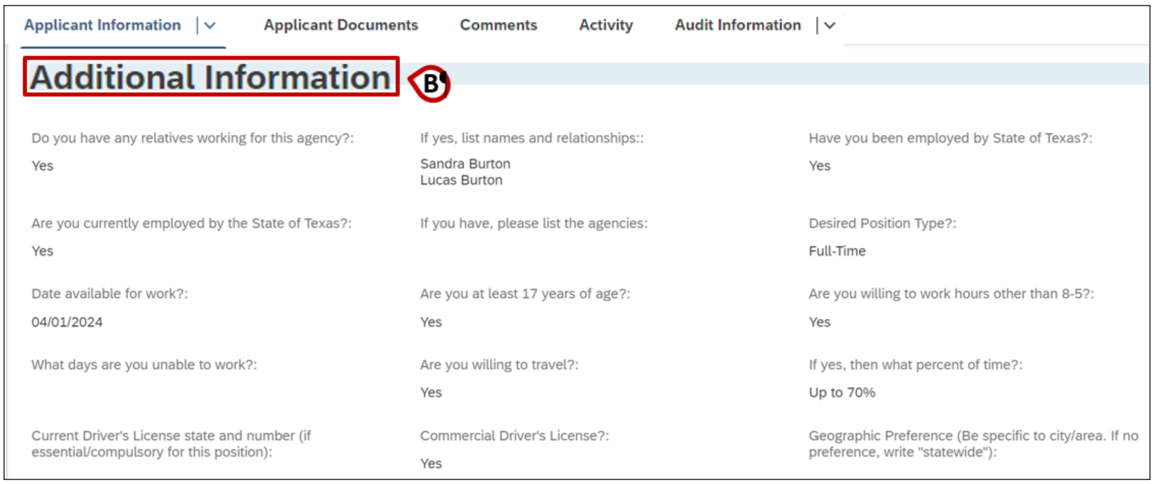
This area also contains a section called "Offline Application/Resume/Employment Continuation Sheet" which stores *Offline Application* documentation. It constitutes the main difference between **online** and **offline** applications. **If it inherits a document**, the candidate applied **offline** via email. You can open and print the documents from here. The main image for this section is an **online** application showing "0 documents attached."



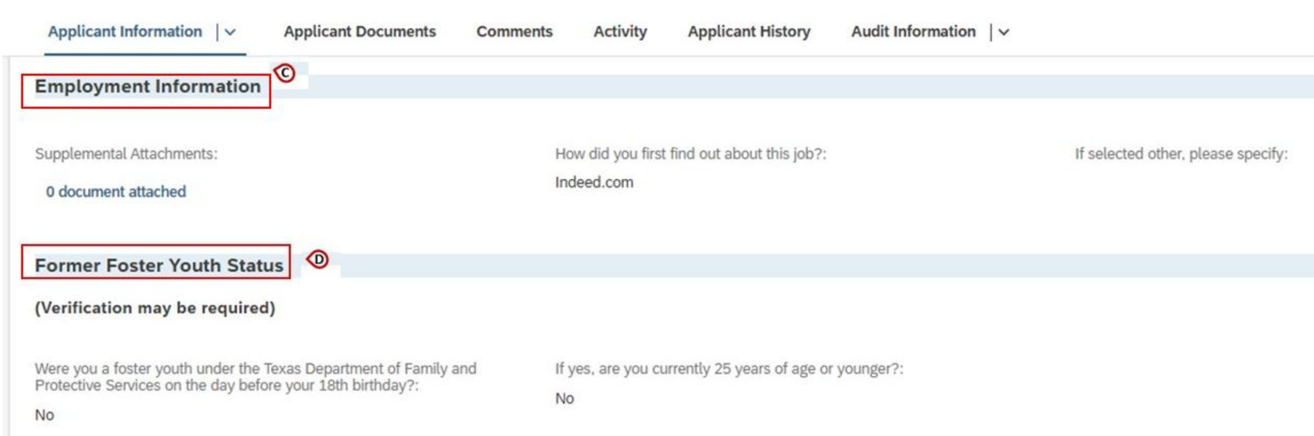
- **Offline applications** will **not** have further information provided in the information sections of the *Application Submitted* status.
- **Online applications** will have further information provided in the data fields of the *Applicant Information* section.

> **Note:** Applicants who apply for postings offline via email will not be able to complete any part of the (required) assessment. Managers must evaluate these applicants without these preset HR system assessments.

The different sub-sections of the ***Application Area*** are called *Application Information*, *Screening Information* and *Profile Information*. Review the application data in the platform.

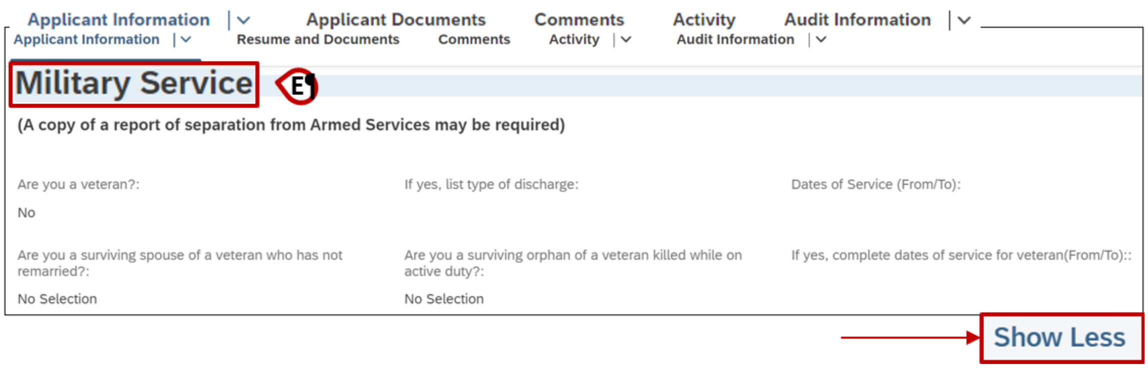


B. **Additional Information**: Header of the first sub-section of Application. The sub-section itself contains various types of questions that were already answered by the candidate.



C. **Employment Information**: Asks for the source of the candidate for finding the JP.

D. **Former Foster Youth Status**: Optionally, candidates provide further personal background information which can be reviewed here.

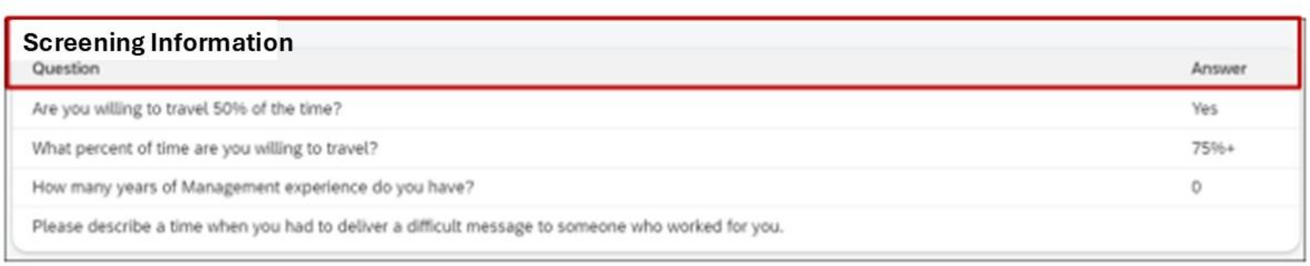


E. **Military Service**: If applicable, candidates provide important information about their veteran status details which can be reviewed here.

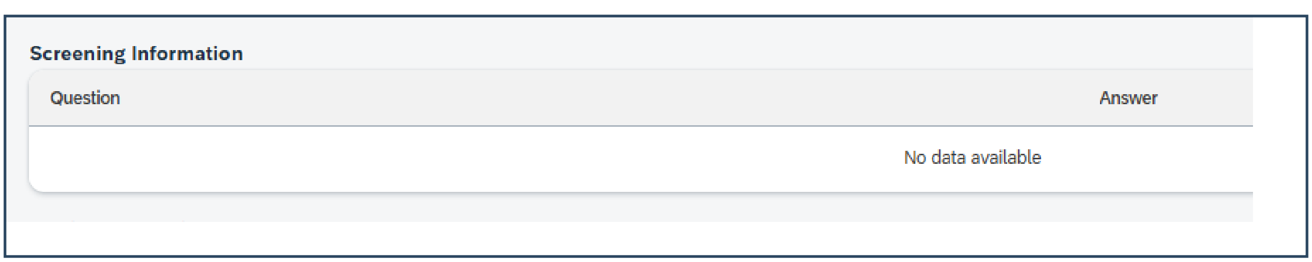
> **Note:** The *Show Less* button allows you to collapse the *Applicant Information* section to have a better overview of the sub-sections. It can be expanded back by using the *Show More* button which will be available then.

8.7.2 Screening Information

This sub-section displays the answers of the applicant regarding the screening questions that were set up during the JP update process (refer 8.3.6 Applicant Screening Questions).



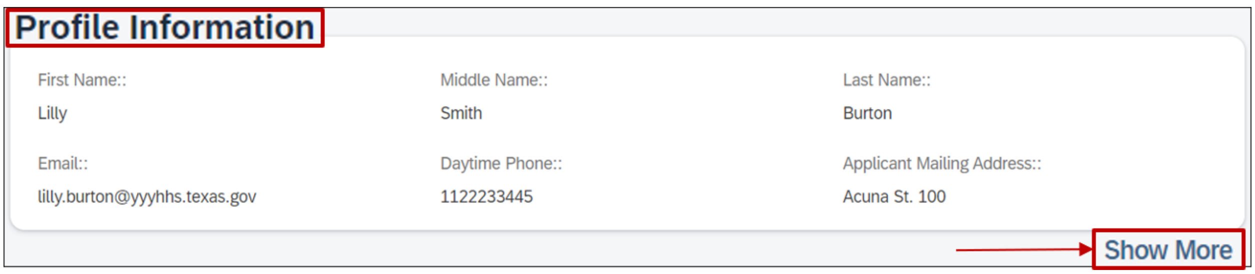
If no questions were set up, this section would appear like this below.



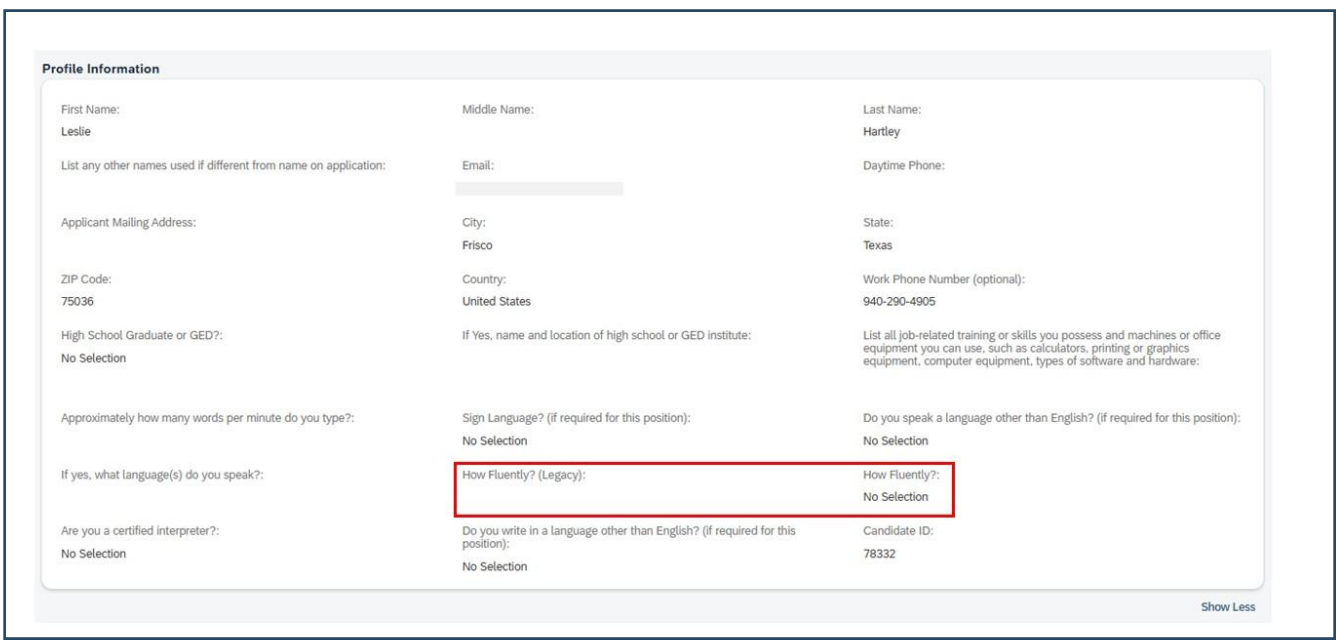
8.7.3 Profile Information

The sub-section captures the personal information around the applicant, provided by the applicant during the submission of the application. Contains the contact and address information, and also includes questions to be answered around the academic background, technical skills and language skills of the candidate.

> **Note:** The *Show More* button allows you to collapse the *Profile Information* section to have a better overview of the sub-sections. It can be collapsed back by using the *Show Less* button which will be available then.



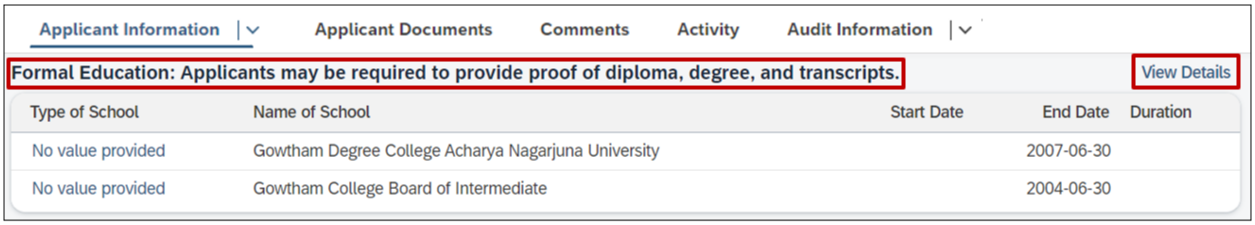
When you expand to show more, this is what you'll see.

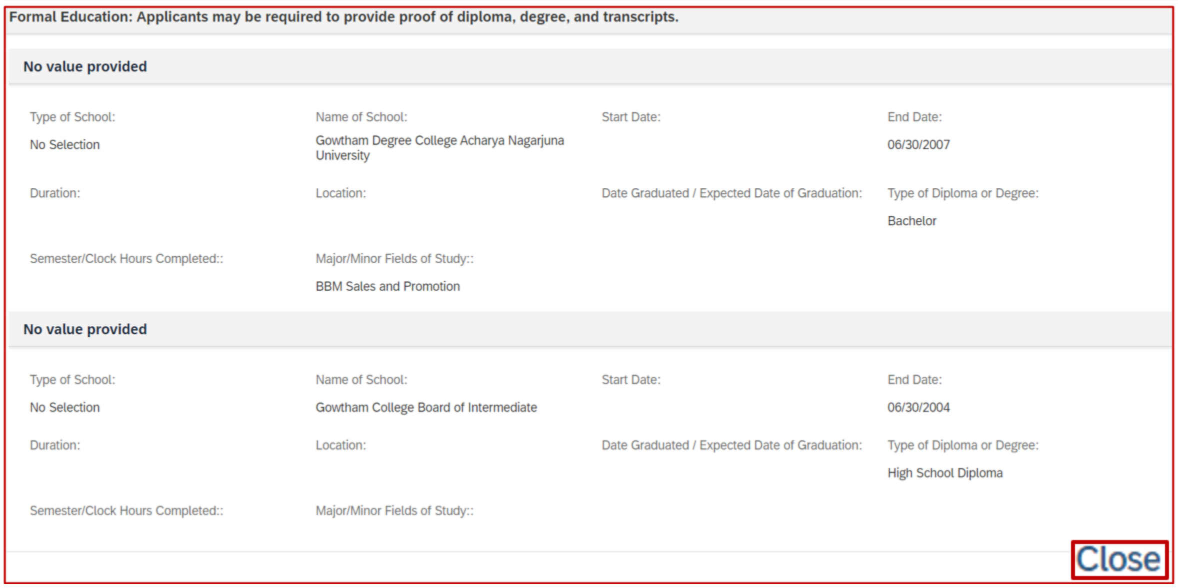


Note: The field labeled "*How Fluently? (Legacy)*" refers to previous data submitted by applicant when this field was an open-ended text box. This allows us to preserve that historical data. The Candidate's Profile is now updated to a drop down menu and you'll see the candidate's response noted in that field.

8.7.4 Formal Education

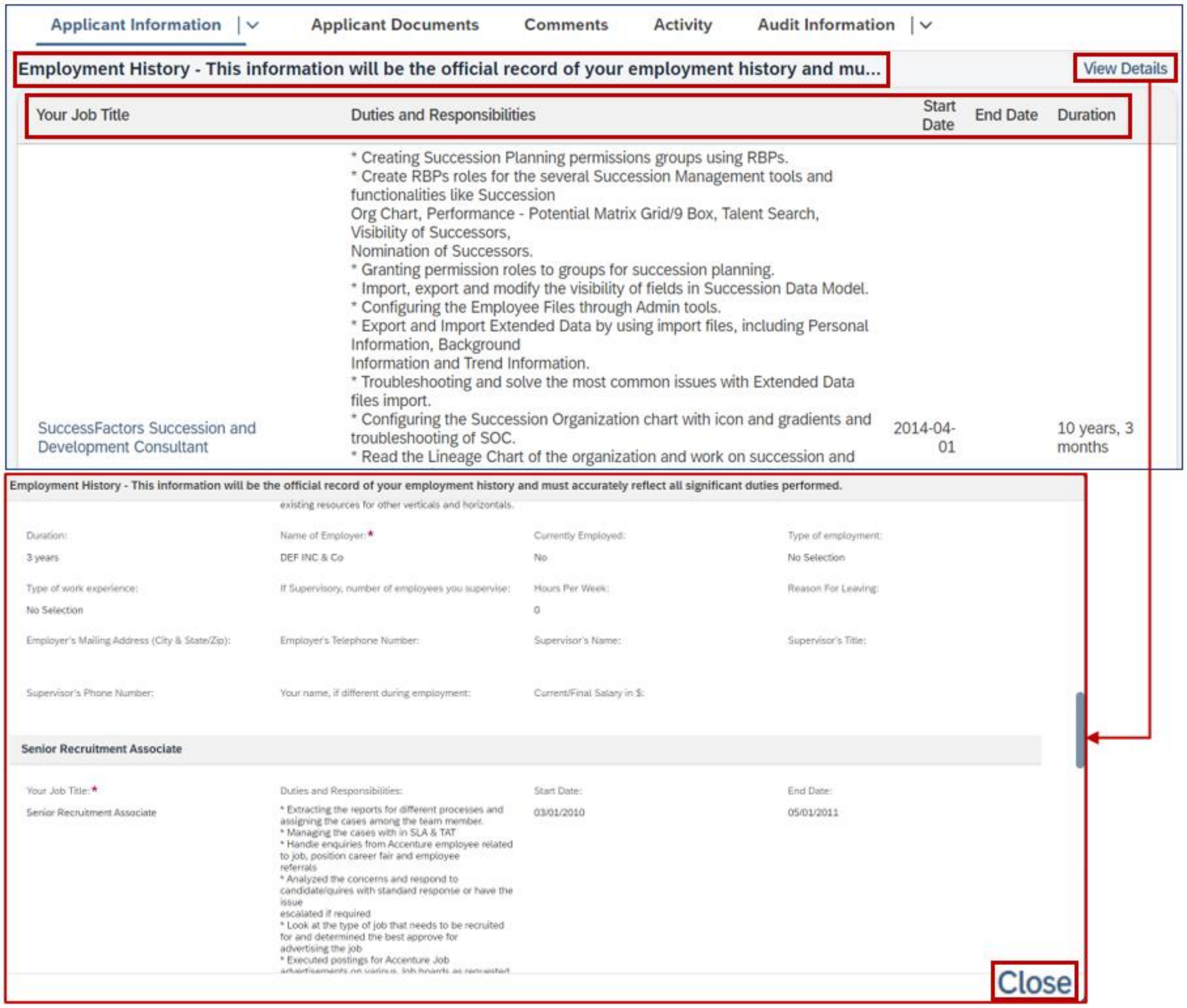
Adopted from the structure of CVs, Applicants may be required to provide the history of their *Formal Education* (proof of diploma, degree, and transcripts), this will be captured in this sub-section. Review the information or click on *View Details* to open a detailed overview.





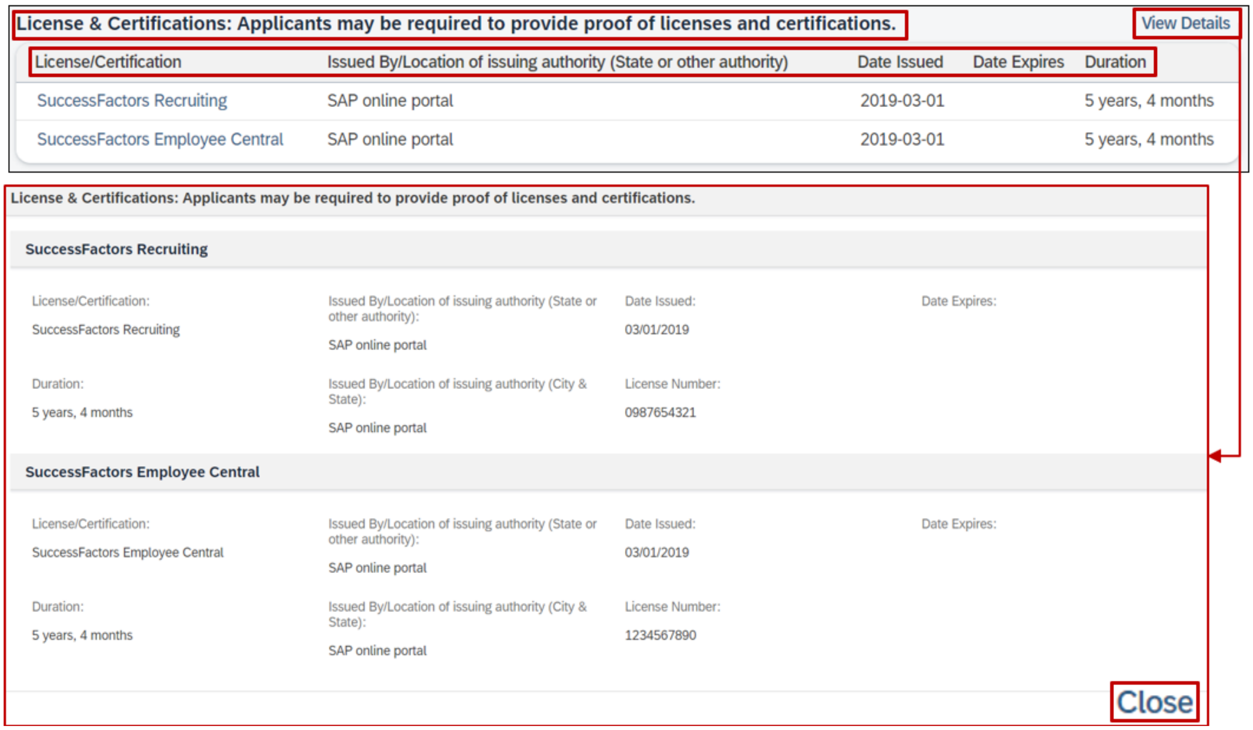
8.7.5 Employment History

Adopted from the structure of CVs, information of this sub-section reflects the official record of applicants' employment history and must accurately portray all significant duties performed. Review the information or click on *View Details* to open a detailed overview.



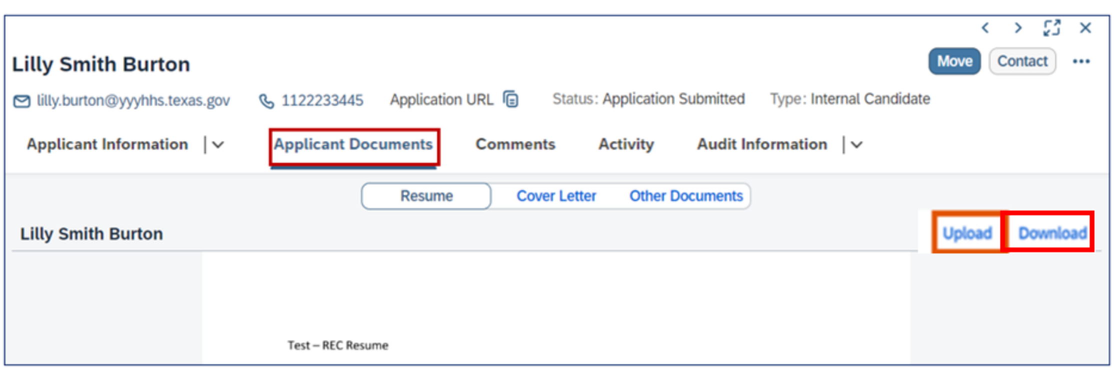
8.7.6 License & Certifications

In the last sub-section, applicants may provided proof of licenses and certifications which could be relevant for the job. Review the information or click on *View Details* to open a more detailed overview.

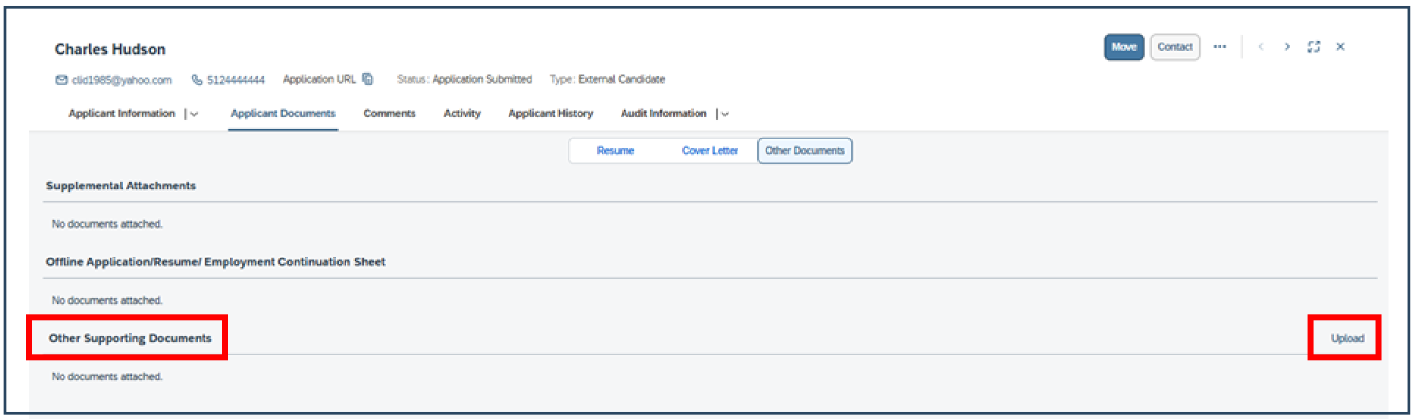


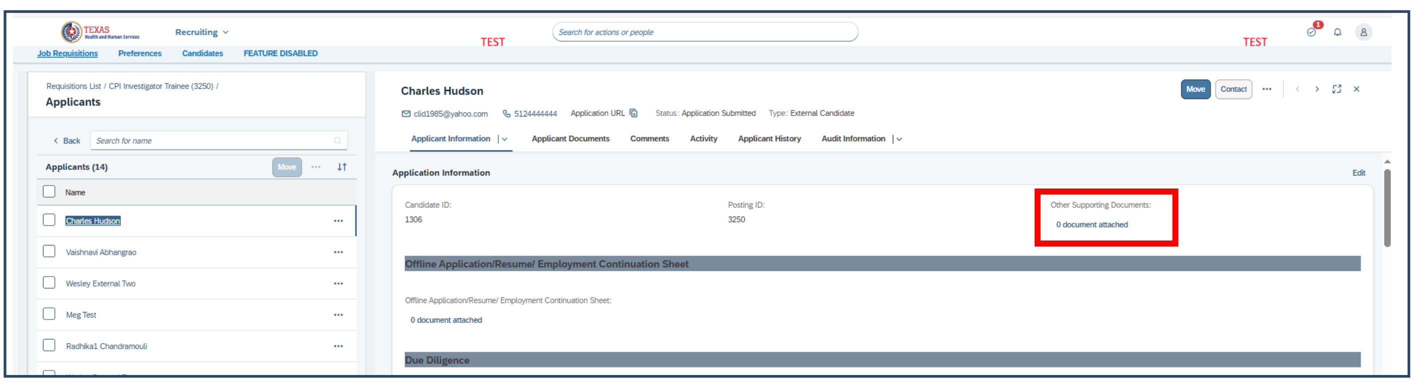
8.7.7 Applicant Documents

The next section of the *Application Area* contains the uploaded *Resume* which can be *uploaded* by replacing the resume and *downloaded*. Two other parts of the section are for storage of *Cover Letters* and *Other Documents* (like references, certifications, offline applications and resumes etc.). If any offline documents are present, you can open and print them from here.



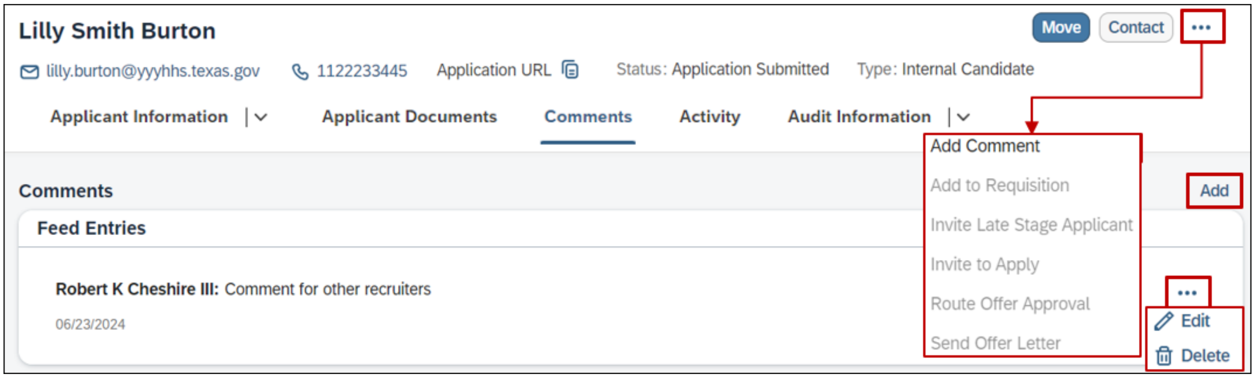
Note: For HR Professional roles only, in the Applicant Documents tab / Other Documents there is an additional section titled "Other Supporting Documents" and an Upload link. This allows the user to upload and attach any additional documents that are needed regardless of the pipeline stage of the candidate. This role will also see an additional section to the right of Posting ID# labeled "Other Supporting Documents" on the Applicant Documents main view. This new feature is only available to HR Professionals. Two related screenshots of this feature are shown below.





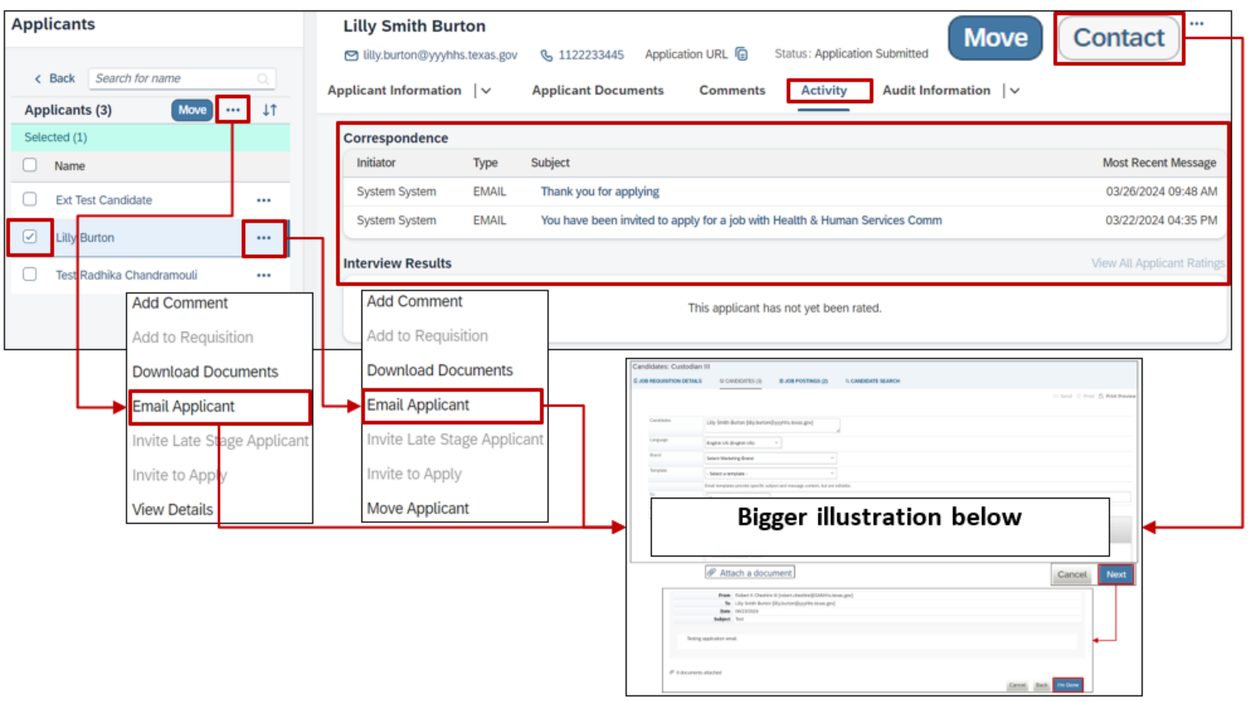
8.7.8 Comments

Hiring Managers can add/delete comments during the recruiting process if necessary. When adding or deleting a comment, the *Save* and *Cancel* buttons will be available to use.



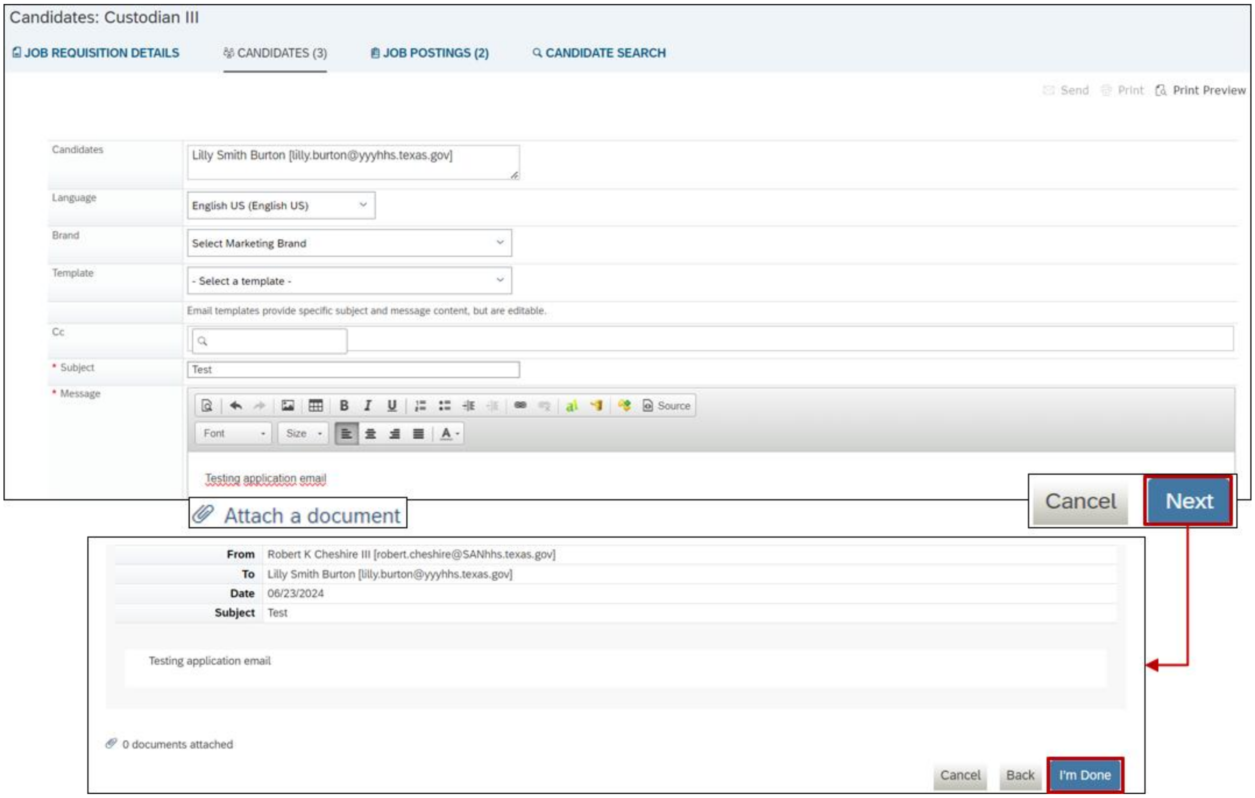
8.7.9 Correspondence and Interview Results

Under the section named *Activity*, managers have the option to review the saved *Correspondence* history. Here are three options available to prepare and send out emails to applicants. Use the *Contact* button in the *Application Area*. It has the same function as the *Email Applicant* option in the More menus of the left sidebar. There is a More menu in the sidebar before the list of applicants. And there is a More menu in the sidebar by each applicant.



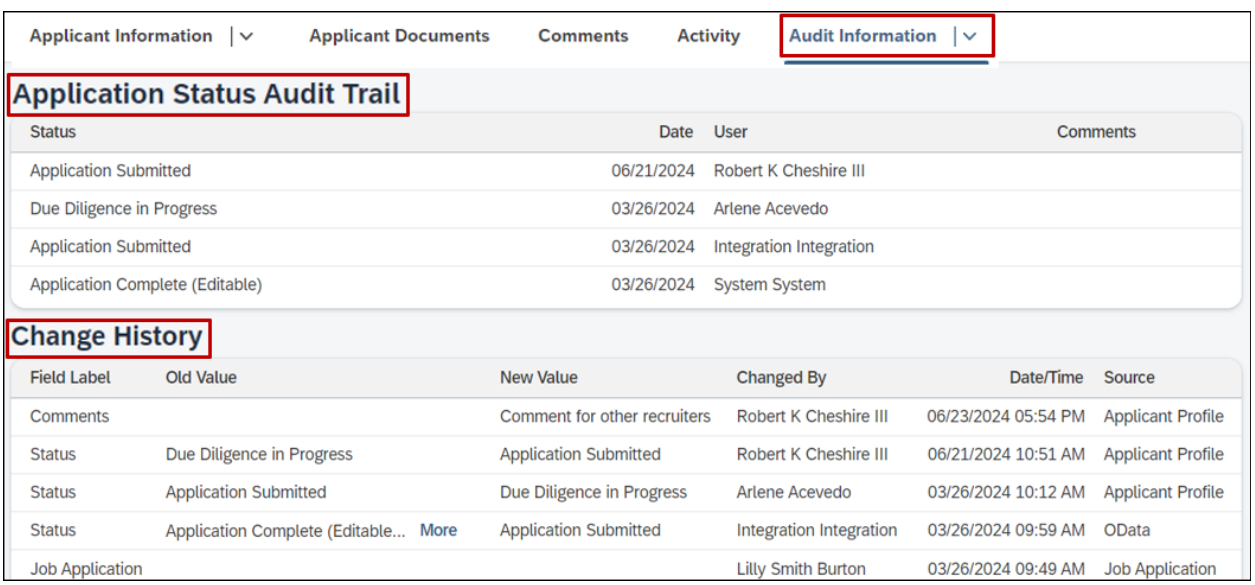
The Contact or Email Applicant button opens a screen to write an email. You can set up ad hoc emails or utilize prepared email templates.

Click on the **Next** button to go to another screen to review the email. You can click on the Cancel, Back or I’m Done button on this review screen.

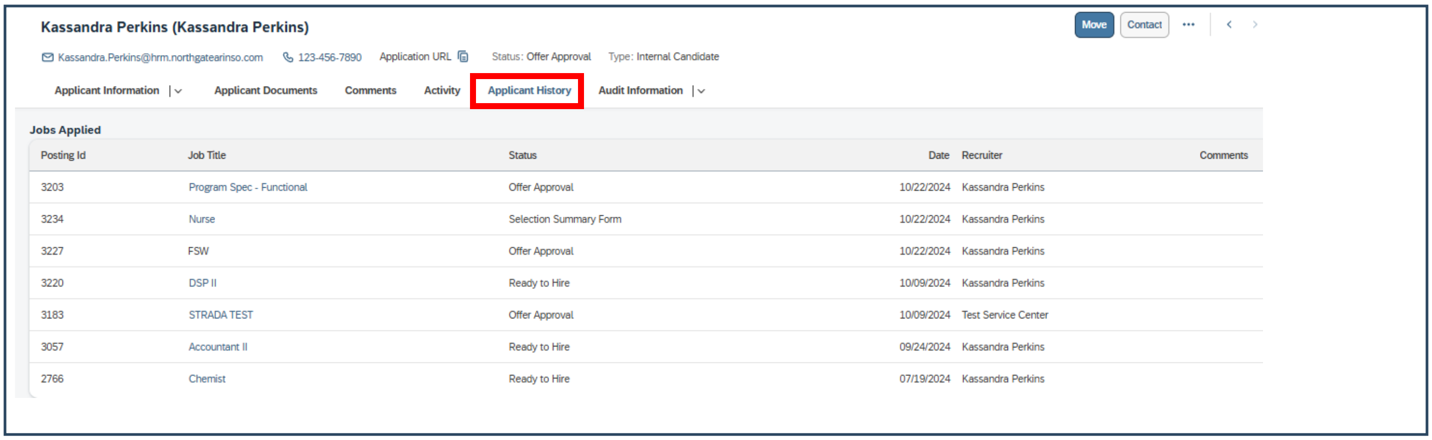


8.7.10 Application Status Audit Trail and Change History

The last section called *Audit Information* displays the *Application Status Audit Trail* that records status value updates performed on the application and *Change History* of all the activities.



> **Note:** Anyone with an HR Professional role will see an additional tab labeled "*Applicant History*" between the Activity and Audit Information tabs. This feature was added so HR Professionals would have an easier way to find out which jobs an applicant has applied to besides running a report. You will see a screenshot of their view below when looking at an Applicant's Application area. This is ONLY for HR Professionals.



8.8 Move Applicants

The New Applicant Workbench offers two ways to move applicants from one status to another. Moving via the *Move* button or the *Applicant List* menu. Both will be described in the following.

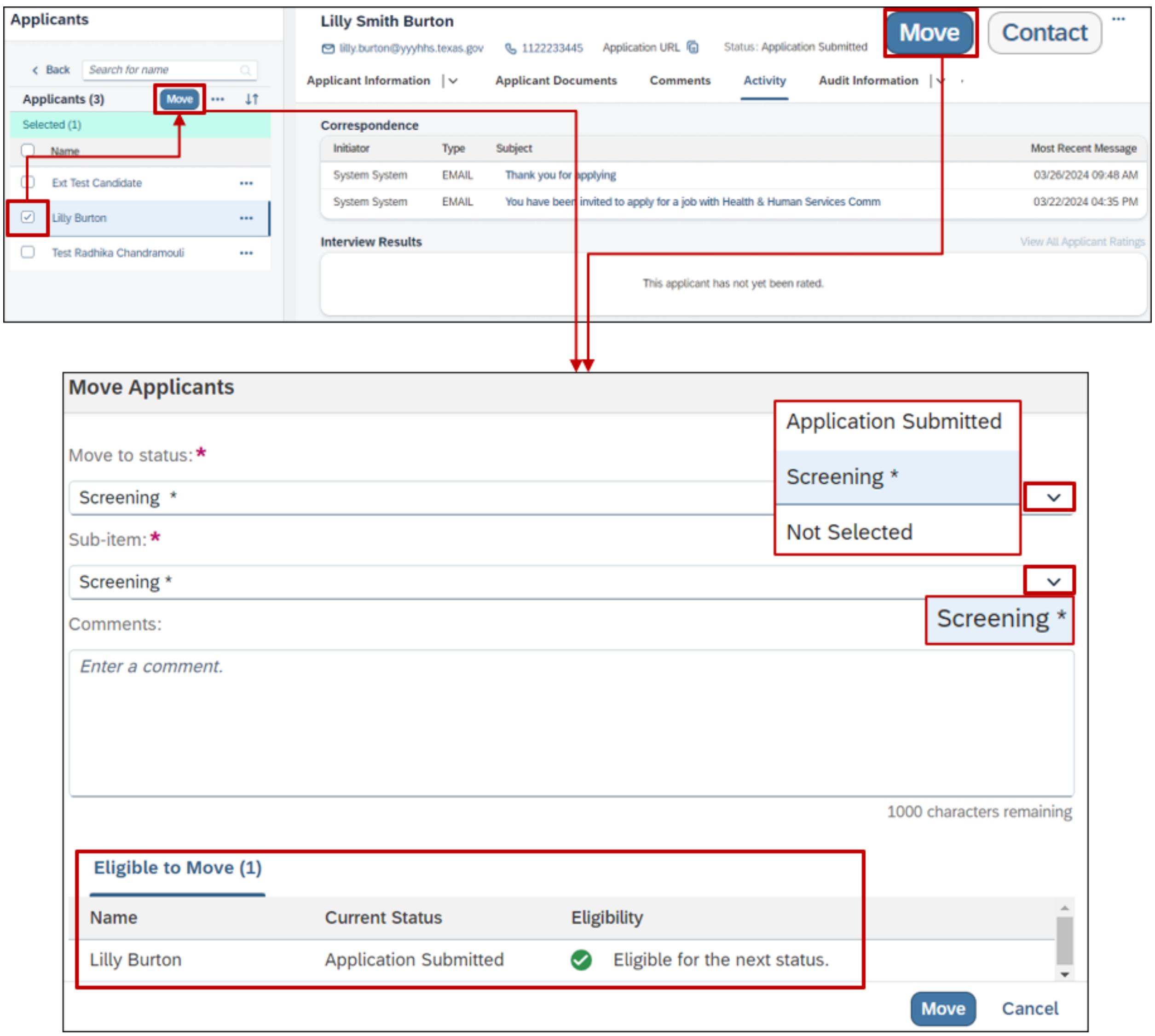
> **Disclaimer**: If you are in the legacy Talent Pipeline view, make sure to toggle back to the New Applicant Management Experience view by enabling the New Applicant Management Experience button.

8.8.1 Move button

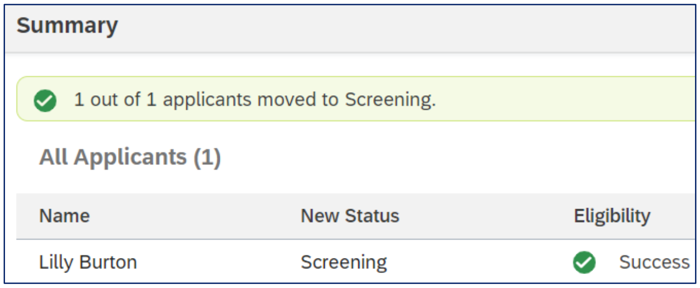
Utilize the *Move* button available in the general *Applicant Workbench* (refer **B** in 8.5.5 Candidates sub-tab (New Applicant Management Experience)) and in the sidebar or on the top right when looking at candiate specific *Application Areas.*

As an example, an applicant has the options to move to Application Submitted, Screening * or Not Selected status. Screening * was selected. A sub-item * must be selected. The only option is Screening *. There is a Comments text field and an Eligible to Move section. The Eligible to Move section provides the applicant's name with their current status and eligibility to move to the next status in a table. Once the status is selected another Move button is available to complete the process.

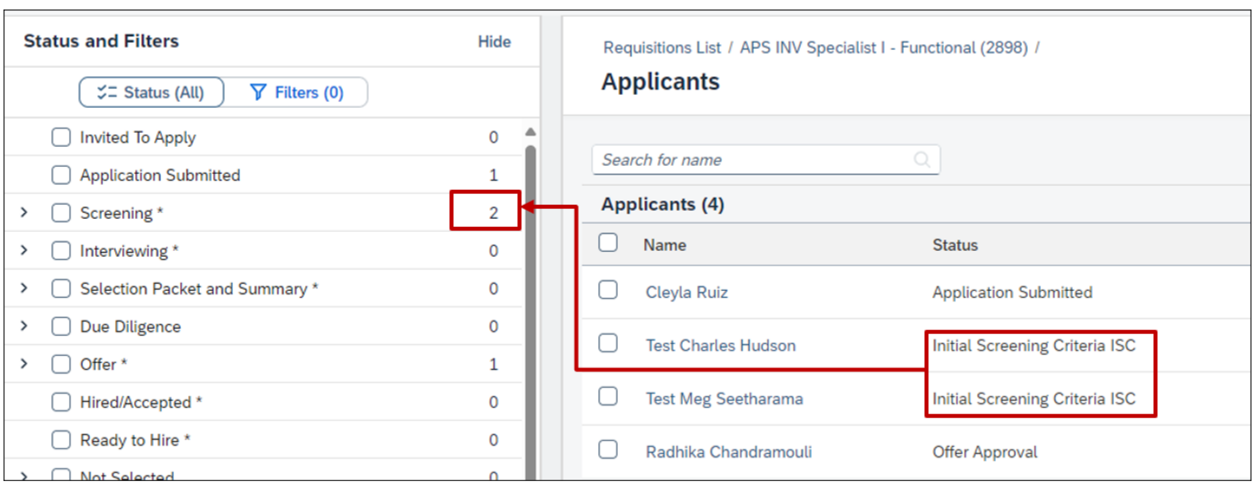
> **Note:** The status drop-down list only shows statuses up until the next mandatory status. In this example *Screening* is the next mandatory (active) status. *Not Selected* counts as a disqualification status and is always available to cancel the consideration of the candidate.



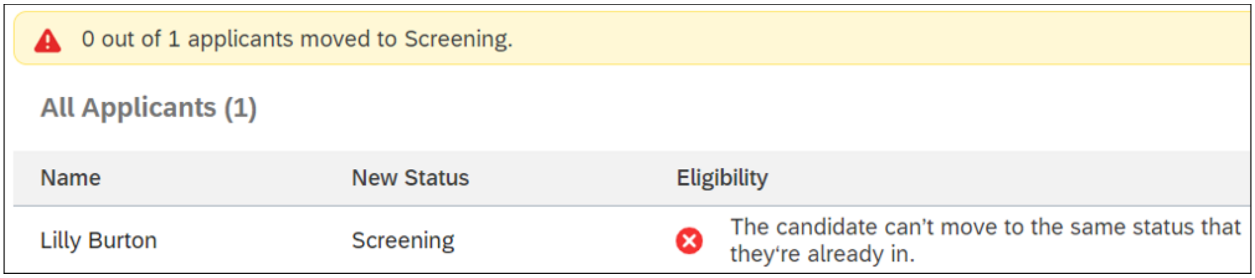
8.8.2 Applicant List Menu



The *Status* in the *Basic Information* area of the application will automatically change to the new status value and will be displayed in the *Status* column of the Applicant Workbench (refer 8.5.4 Candidates sub-tab (Talent Pipeline View)). Additionally, the Status Pipeline will show a bigger count for the number of applicants in the respective status.



> **Note:** Trying to move an applicant to current active status will result in an automated system error message as there will be no change to the specific application process in this case.



8.9 Applicant Status Pipeline

The *Applicant Status Pipeline* displays various optional and mandatory statuses a candidate can be moved to. The application process flows from vertically from top to bottom in the pipeline and upcoming mandatory (marked with an asterisk *****) statuses cannot be skipped (e.g. if a candidate is in the *Screening* stage, the *Interviewing* status **has to be** utilized before being allowed to move to the *Selection Packet and Summary* status, which comes after *Interviewing* in the pipeline.)

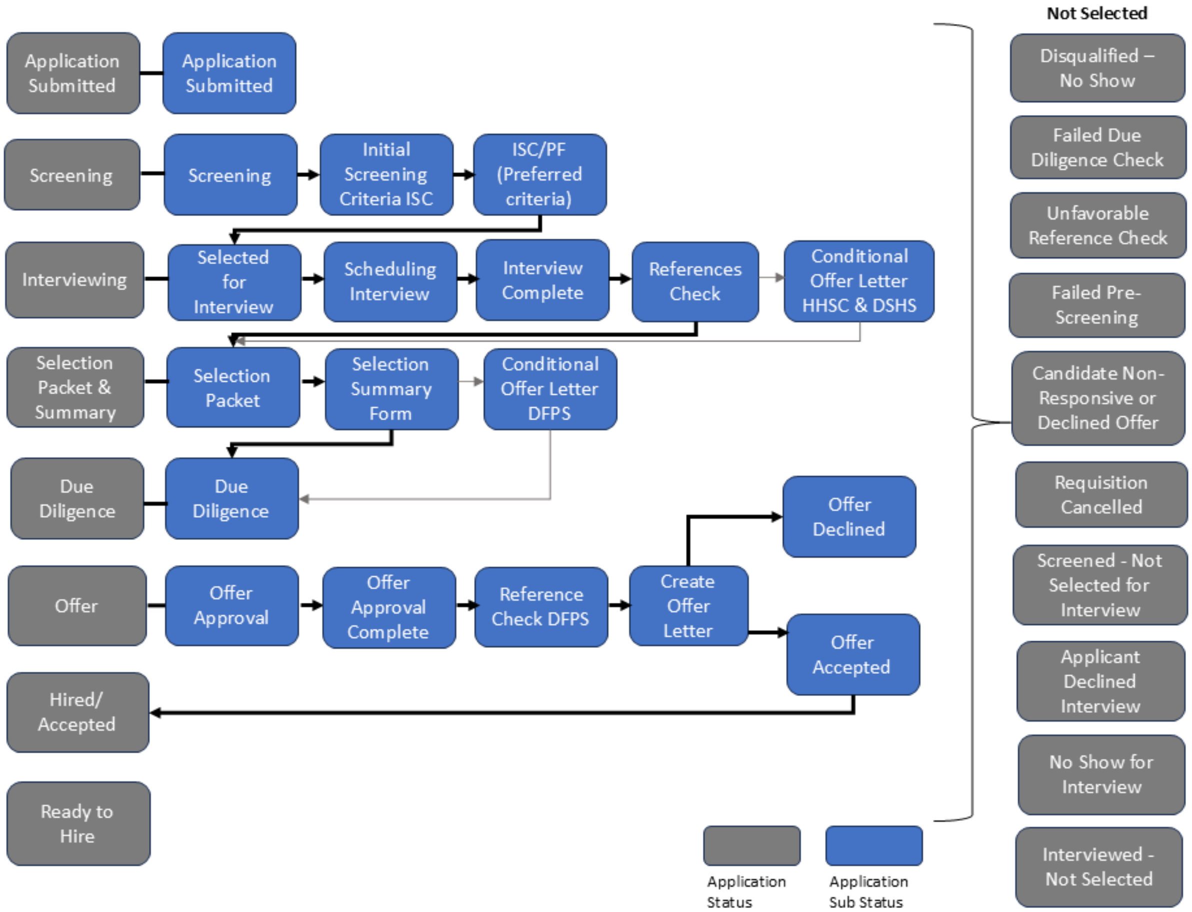
Application Statuses:

1. Application Submitted (Application Status)
   A. Application Reset (Application Sub-status)
   B. Online Application Submitted (Application Sub-status)
   C. Emailed Application Submitted (Application Sub-status)
2. Screening * (Application Status)
   A. Screening * (Application Sub-status)
   B. Initial screening criteria (Application Sub-status)
   C. ISC/PF (Preferred criteria) (Application Sub-status)
3. Interviewing * (Application Status)
   A. Selected for Interview (Application Sub-status)
   B. Scheduling Interview * (Application Sub-status)
   C. Interview Complete * (Application Sub-status)
   D. References Check (Application Sub-status)
   E. There is an optional sub-status: Conditional Offer Letter – HHSC & DSHS (Application Sub-status)
4. Selection Packet and Summary * (Application Status)

   A. Selection Packet * (Application Sub-status)
   B. Select Summary Form * (Application Sub-status)
   C. There is an optional status: Conditional Offer Letter –DFPS (Application Sub-status)
5. Due Diligence (Application Status)
   A. Due Diligence in Progress (Application Sub-status)
6. Offer * (Application Status)
   A. Offer Approval * (Application Sub-status)
   B. Offer Approval Complete * (Application Sub-status)
   C. Create Offer Letter (Application Sub-status)
   D. Offer Accepted (Application Sub-status)
   E. Offer Declined (Application Sub-status)
   F. Reference Check – DFPS (Application Sub-status)
7. Hired/Accepted * (Application Status)
8. Ready to Hire * (Application Status)

During any of the Application Statuses the candidate can be moved to the Not Selected Status with a corresponding sub-status

1. Not Selected (Application Status)
   A. Disqualified No Show (Application Sub-status)
   B. Failed Due Diligence Check (Application Sub-status)
   C. Unfavorable Reference Check (Application Sub-status)
   D. Failed Pre-screening (Application Sub-status)
   E. Candidate Non-Responsive or Declined Offer (Application Sub-status)
   F. Requisition Cancelled (Application Sub-status)
   G. Screened Not Selected for Interview (Application Sub-status)
   H. Applicant Declined Interview (Application Sub-status)
   I. No Show for Interview (Application Sub-status)
   J. Interviewed Not Selected (Application Sub-status)

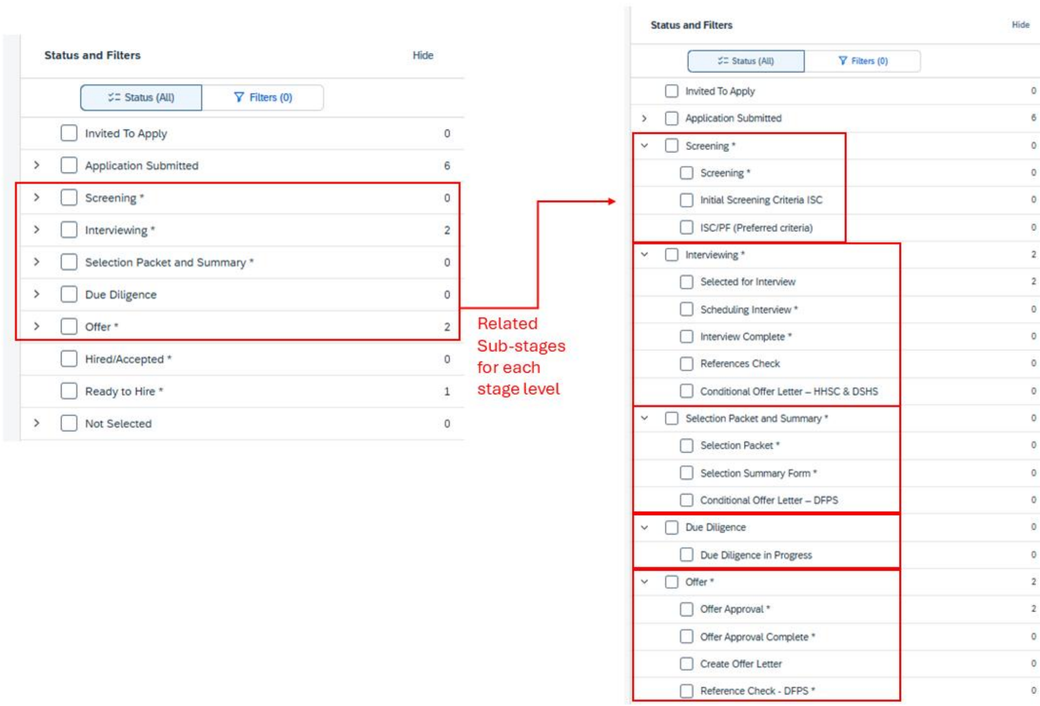


> **Note:** Please follow one of the methods in chapter [8.8 Move Applicants] to bring applicants in the next mandatory status in their application process. The consecutive mandatory statuses in the pipeline are below. It requires the **Hiring Manager** to consider utilizing the active non-mandatory statuses for each applicant and gather as much information as possible.

Consecutive mandatory statuses in the pipeline:

- Screening *
  - Screening *
- Interviewing *
  - Scheduling Interview *
  - Interview Complete *

- Selection Packet and Summary *
    - Selection Packet *
    - Selection Summary Form *
- Offer *
    - Offer Approval *
    - Offer Approval Complete *
- Hired/Accepted *
- Ready to Hire *



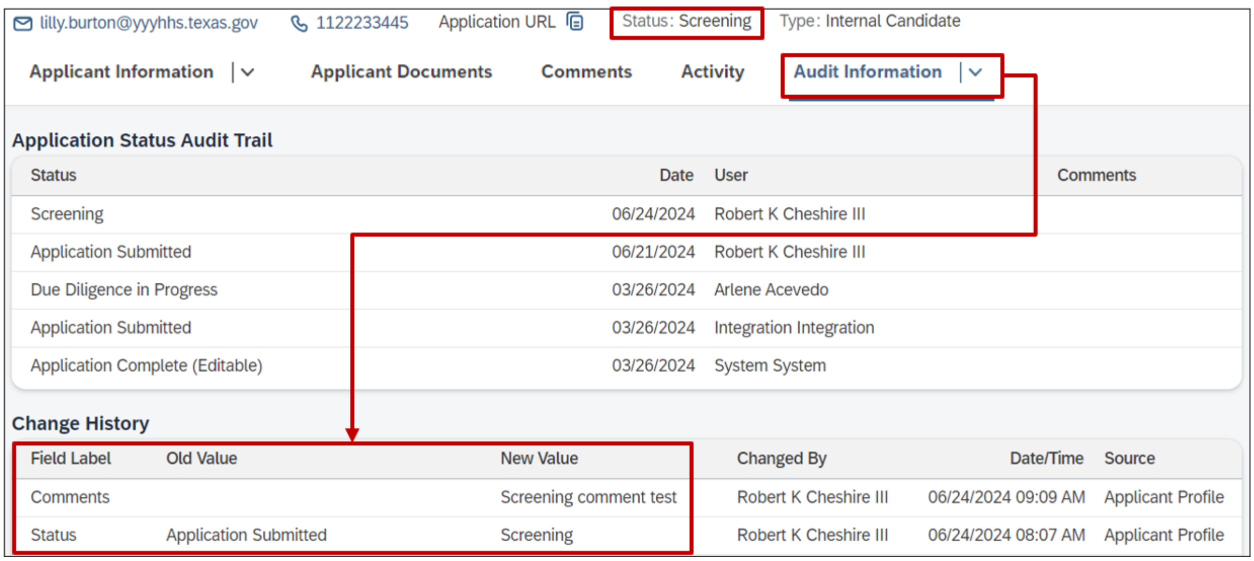
8.9.1 Online/Offline Application Submitted

This status was covered as part of the introduction of the applicants' *Application Area* in chapter 8.7 Application Area.

8.9.2 Screening *

After first evaluations of the data, applicants are moved to the *Screening* status evaluated further and considered for an interview. The initial *Screening* sub-status is mandatory to go through and two other parts are optional: *Initial Screening Criteria ISC and ISC/PF (Preferred criteria)*.

1. Go to the *Application Area* of a specific candidate (review: [8.6.1 Online Application]).
2. If necessary, move the candidate to the new status by following the description in [8.8 Move Applicants]. Select *Screening ** as the main status and *Screening ** as the sub-status.
3. Before saving, consider entering a comment to be reflected in the *Application Status Audit Trail* (further information: [8.7.10 Application Status Audit Trail and Change History]).

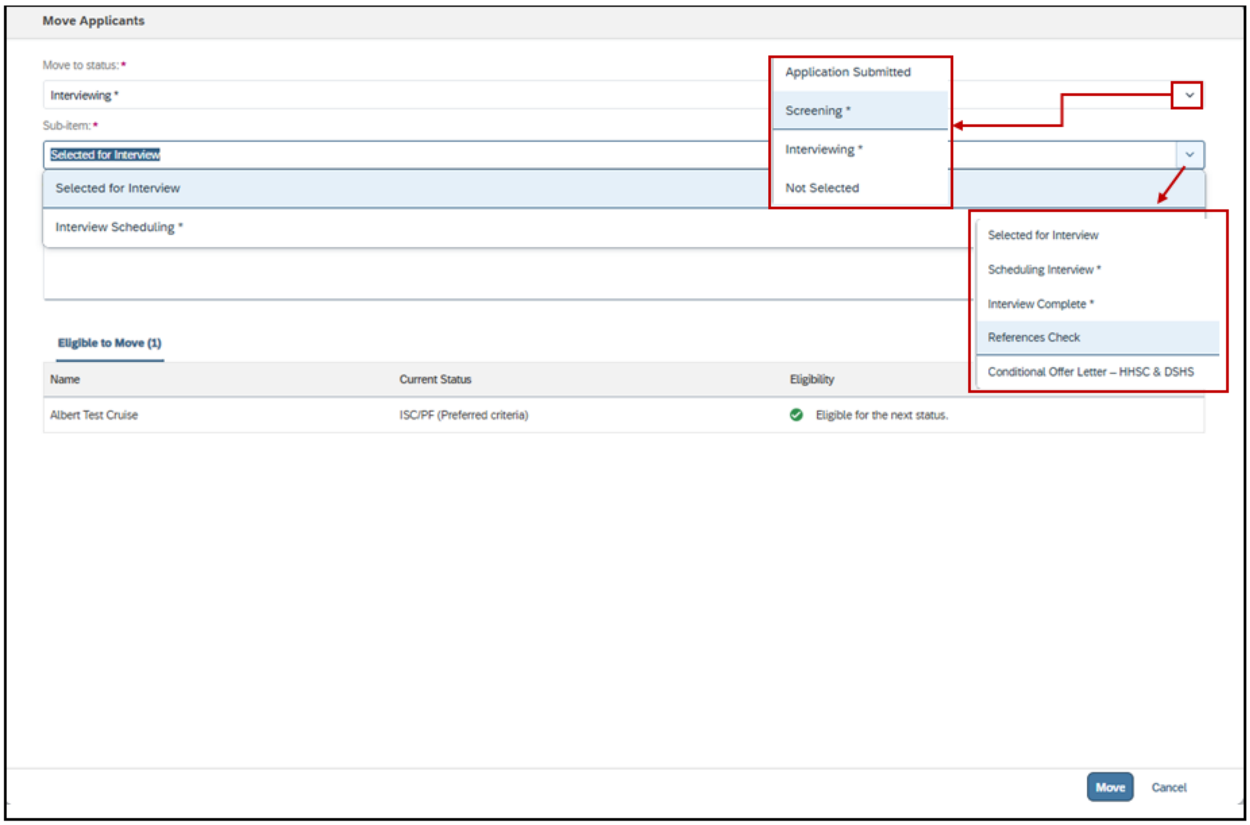


The *Screening* sub-statuses do **not** include additional data fields to be populated in the *Application Area* by a Hiring Manager. The status functions as a reference step in the application process. Once screened by the Hiring Manager, it should be decided whether to advance, move or disqualify the applicant in the pipeline.

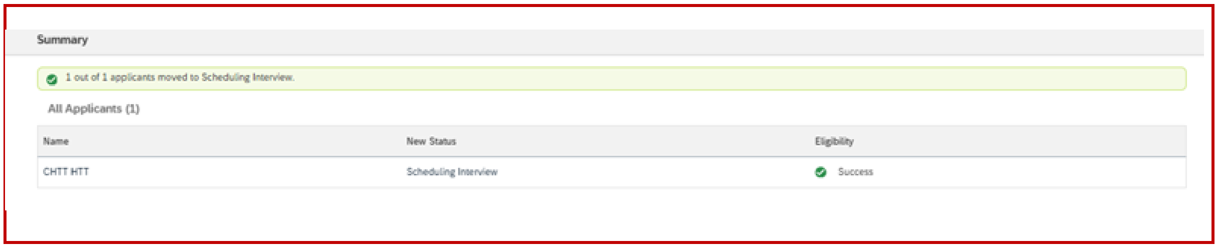
Disclaimer: If you are in the legacy Talent Pipeline view, make sure to toggle back to the New Applicant Management Experience view by enabling the New Applicant Management Experience button.

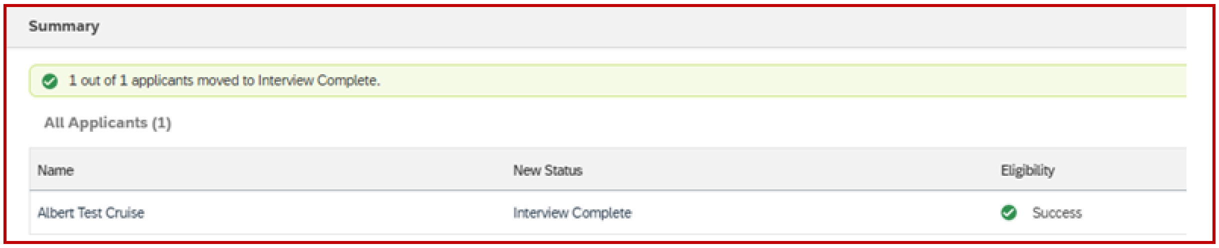
8.9.3 Interviewing *

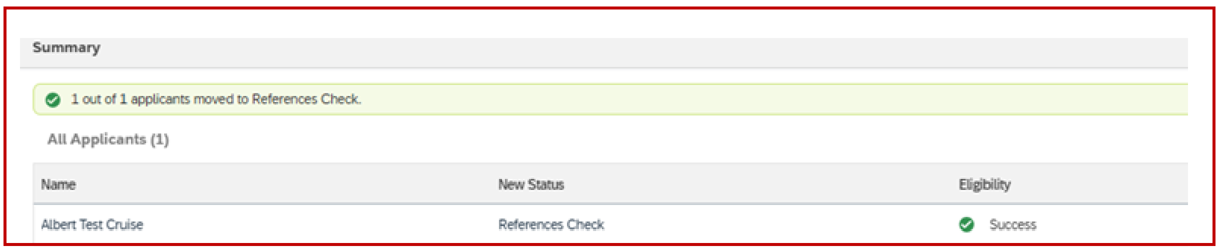
Move the Candidate to the Interviewing status after the Screening was successfully completed. Move it to the Sub-status Selected for Interview to plan the interview and then to Scheduling Interview * and Interview Complete * once the interview has been completed. You have two optional Sub-statuses of References Check and Conditional Offer Letter – HHSC & DSHS to select if needed.

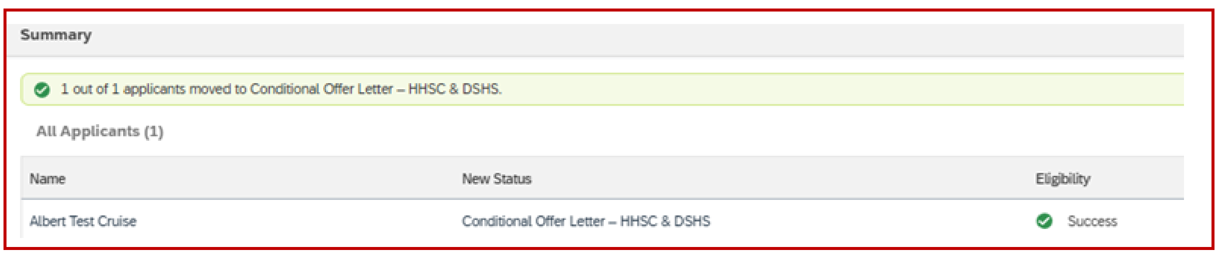


Use the Move button to move the candidate through the various Sub-stages.





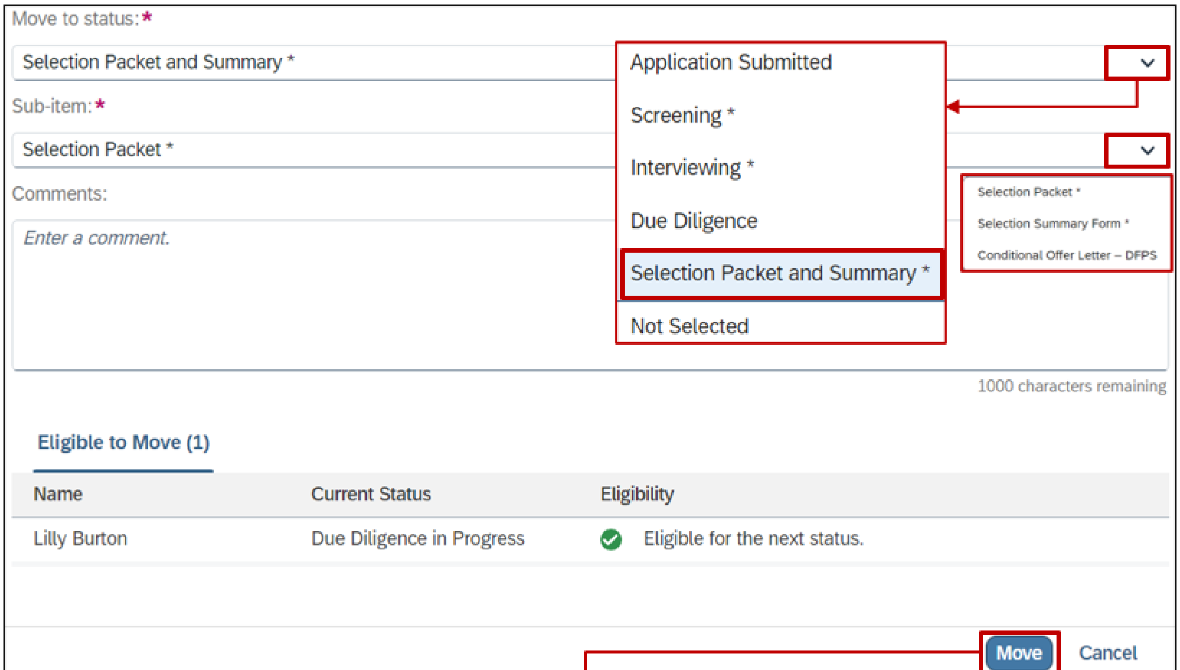


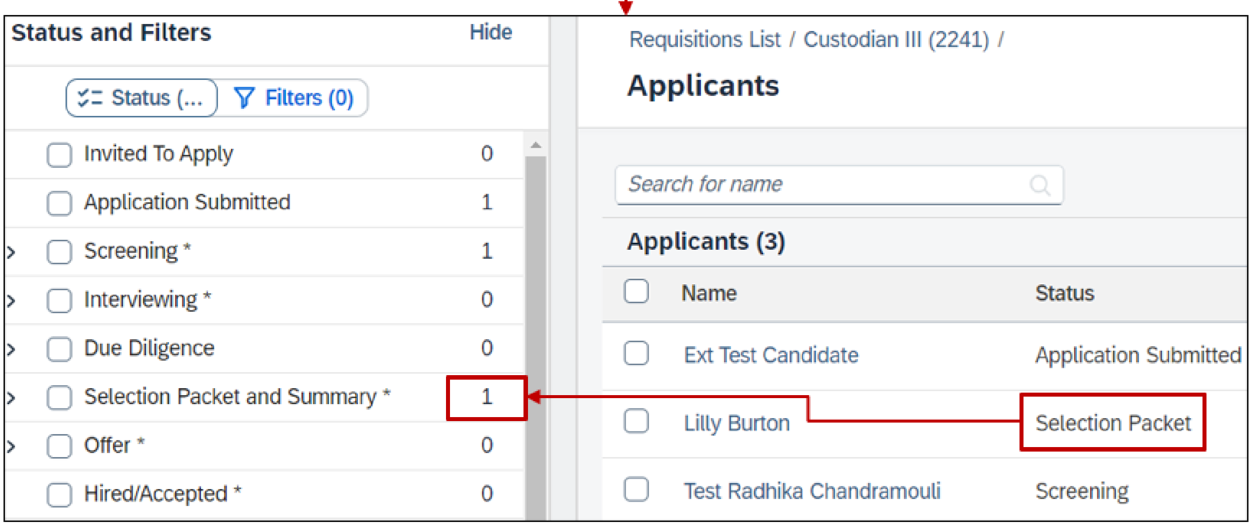


Disclaimer: If you are in the legacy Talent Pipeline view, make sure to toggle back to the New Applicant Management Experience view by enabling the New Applicant Management Experience button.

8.9.4 Selection Packet and Summary *

Move the applicant to the next **mandatory** status by using a method in chapter 8.8 Move Applicants. The pipeline status number will be updated automatically afterwards.



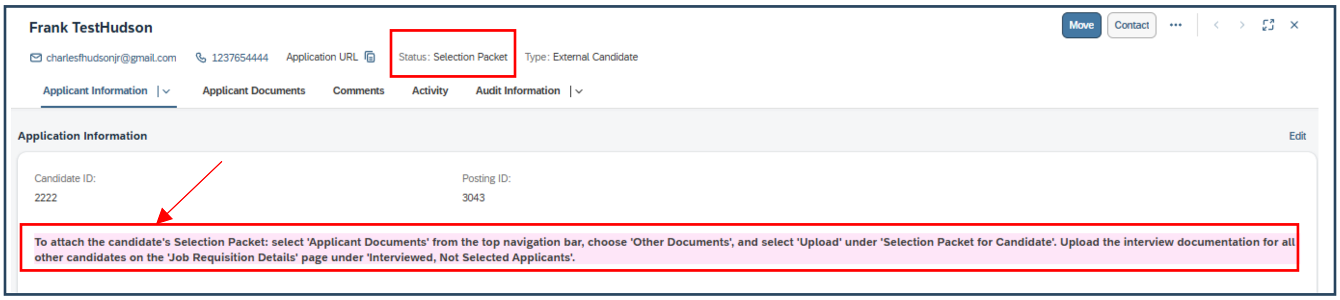


Note: This is the first stage (Selection Packet and Summary) where Hiring Manager is asked to upload documents to complete the required task before moving forward.

The status is based on two mandatory sub-statuses:

Selection Packet *

The mandatory field *Selection Packet for Candidate* (designated with an asterisk (*)) will be displayed in the *Application Information* area of the applicant. When at the Selection Packet stage, you will see this screen below with a pink Instructional Bar.

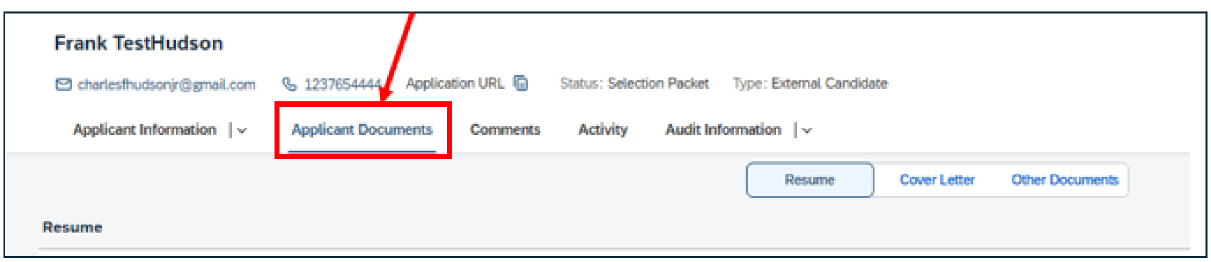


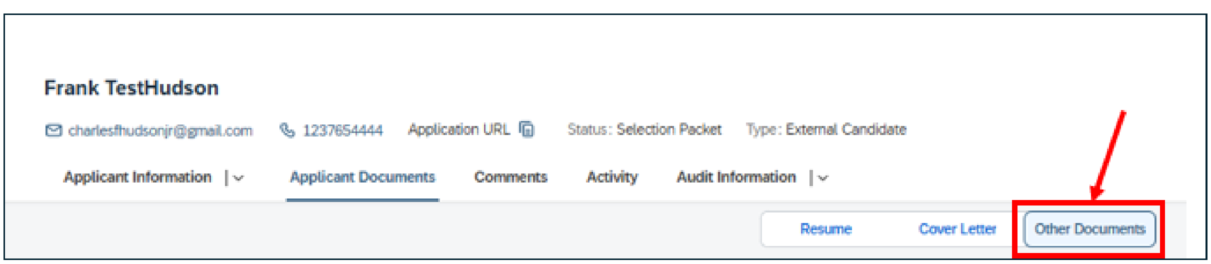
You will notice that the pink Instructional Bar indicates that two tasks are needed:

1. Attach the candidate's Selection Packet
2. Upload the interview documentation for all other candidates

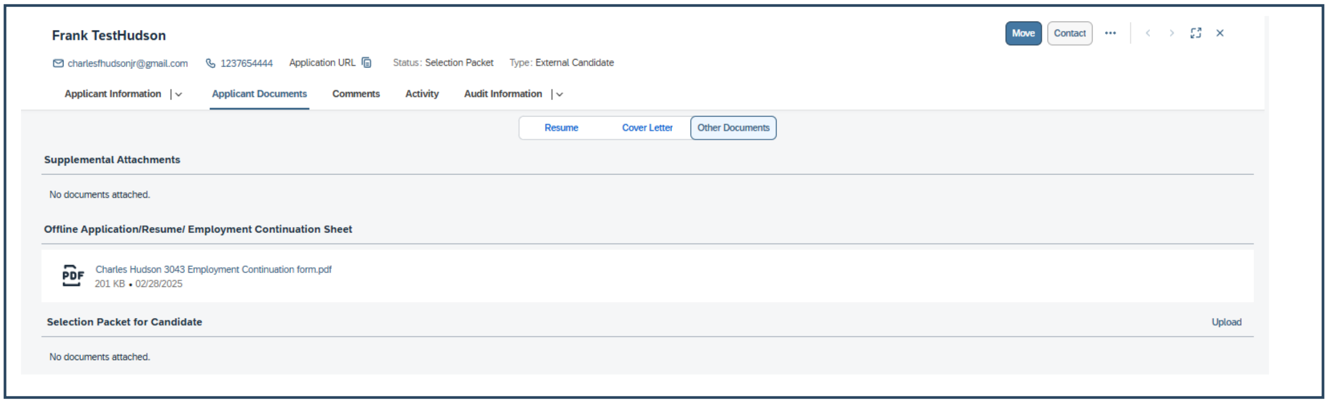
1.**To Attach the candidate's Selection Packet**

Select the Applicant Documents link and choose Other Documents link.

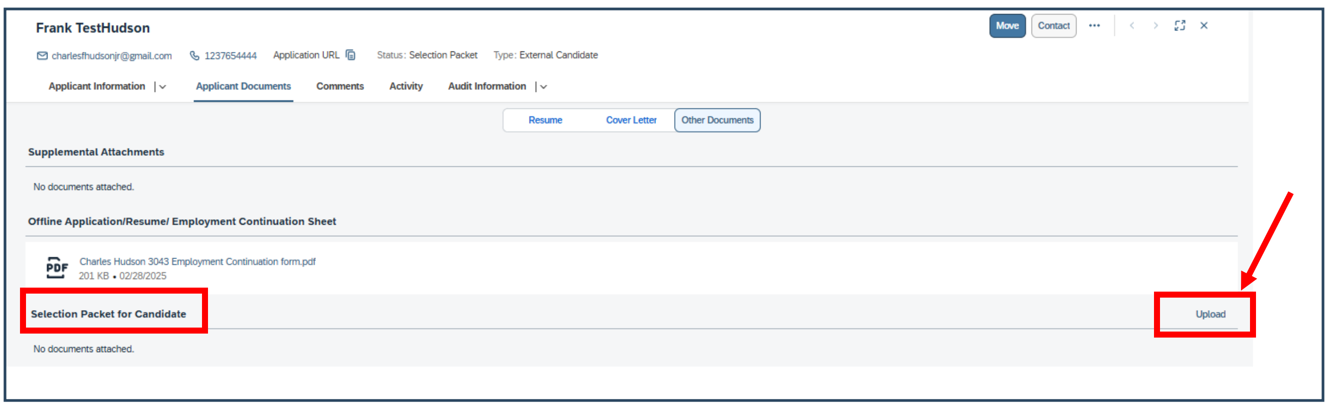




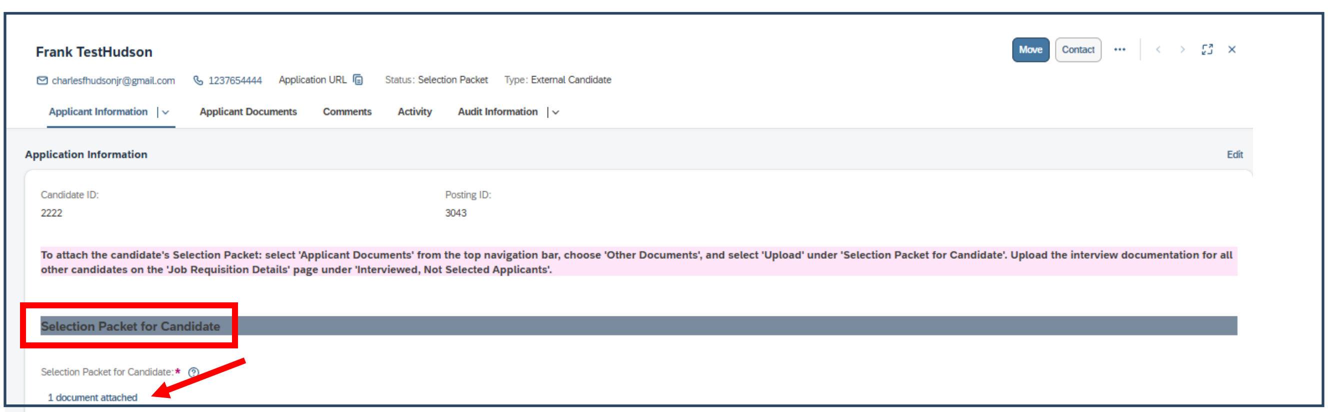
You will see this screen below.



Select the Upload button under Selection Packet for Candidate section and locate the Selection Packet file and upload it.



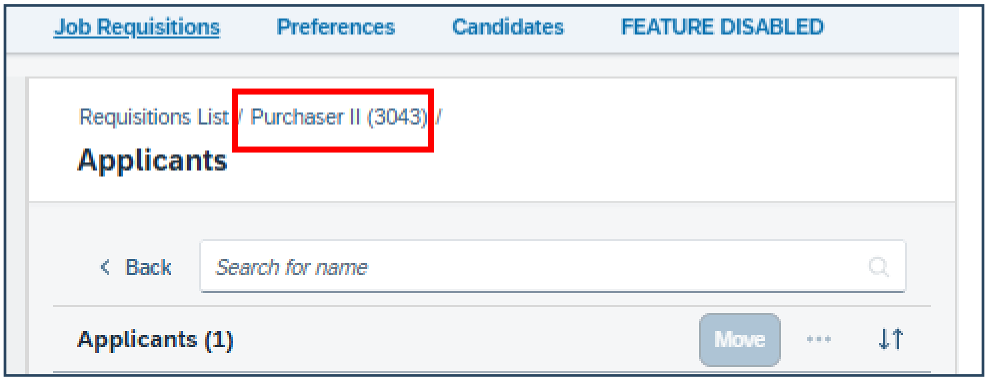
Once the Hiring Manager uploads the document, the screen will show the attachment added in the Selection Packet for Candidate section.



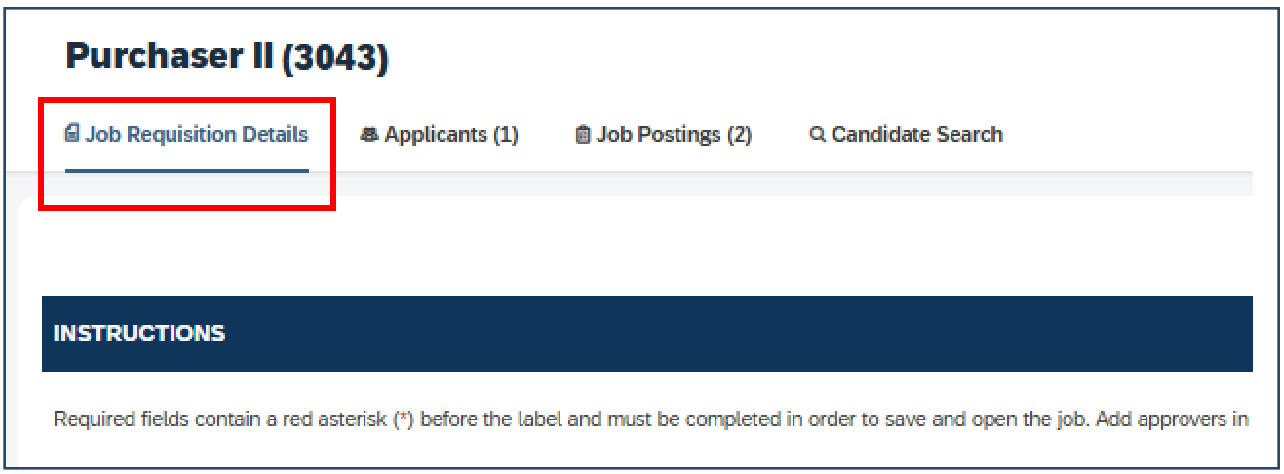
This completes the first of the two tasks mentioned in the pink Instructional Bar. Now you need to upload the interview documentation for all other candidates.

2.**Upload interview documentation for all other candidates**

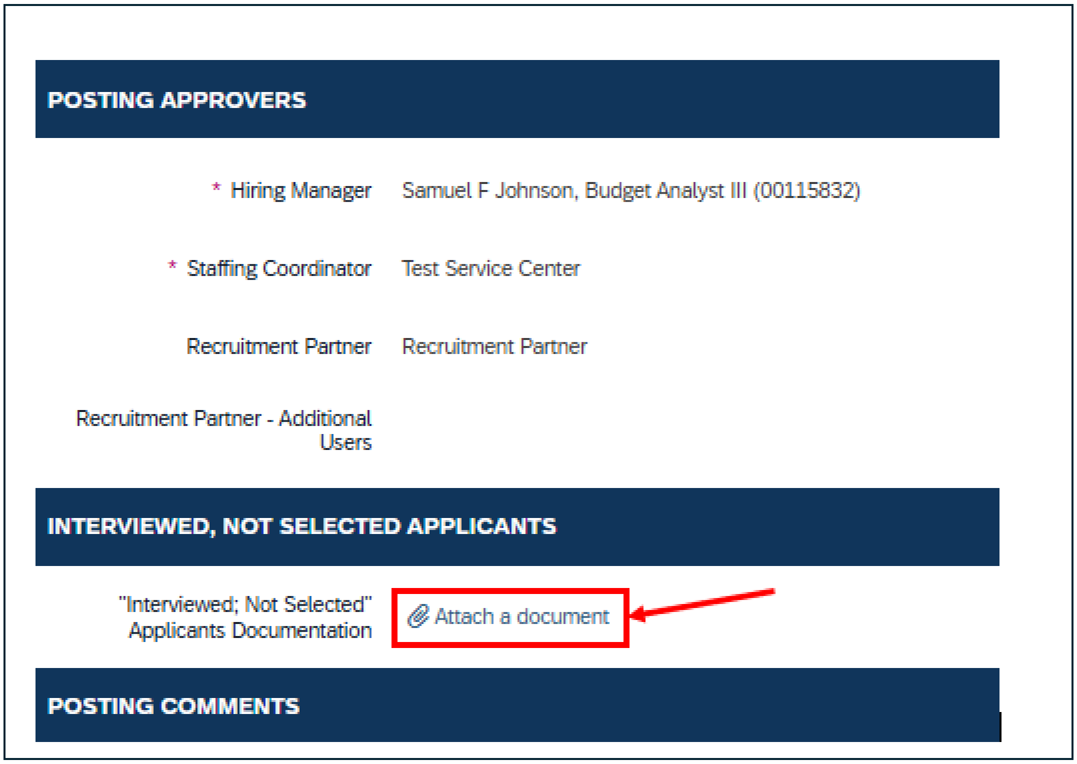
Select the Job Posting number to go to the Job Requisitions Details page.



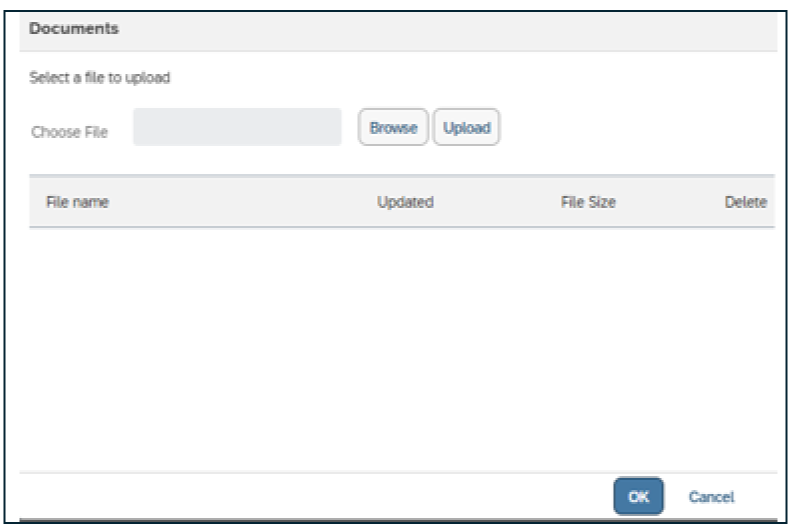
You will see this screen below. You will be on the Job Requisition Details page.



Scroll down to the "**Interviewed, Not Selected Applicants**" section and select the "Attach a document" link.

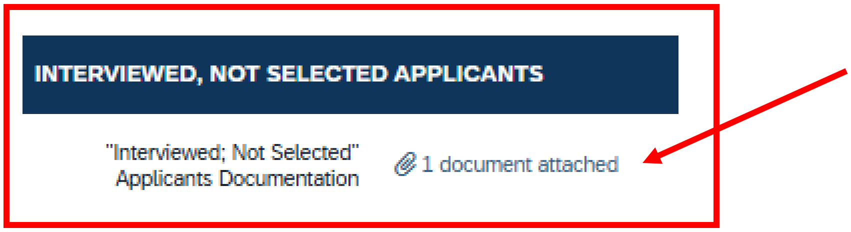


You will see this screen.



Select the Browse button to locate the file for the "**Interview Documentation for All Other Candidates**" and then choose the Upload button. Then select OK button.

Once your attachment has been uploaded, you see this confirmation below.

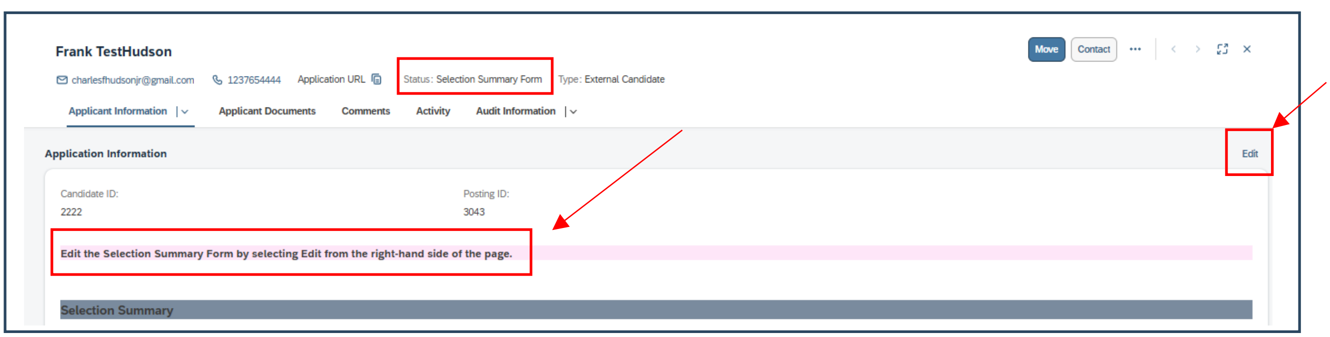


You have now completed the two required steps for the Selection Packet stage. You are now able to move to the Candidate to the next sub-stage: Selection Summary Form.

> **Note:** Attached documents can only be uploaded and removed in the *Selection Packet* status. Once this status is passed, those documents cannot be updated anymore.

Selection Summary Form *

A new area inside the *Application Information* section will appear after moving the applicant to the *Selection Summary Form* status. Select the *Edit* button to insert information into the required fields. See the screen shot below with the pink Instructional Bar.



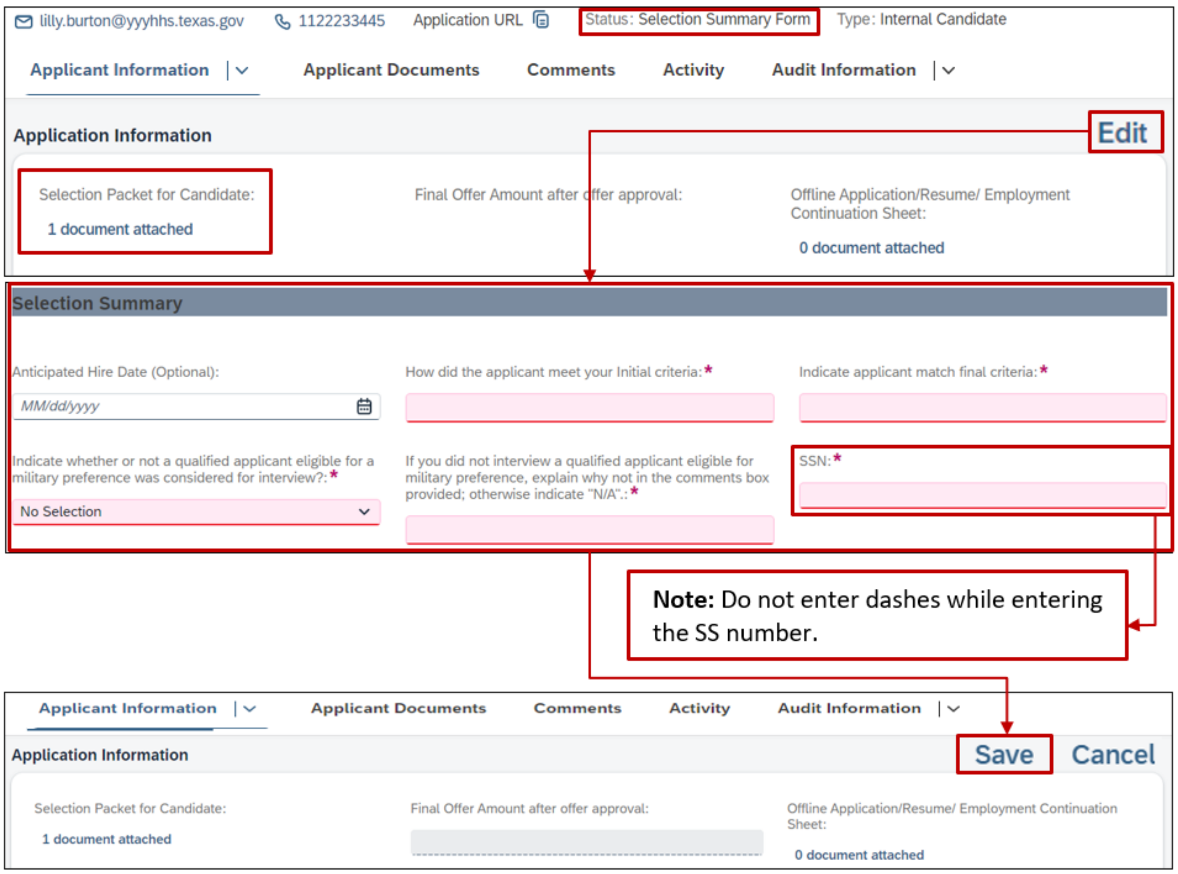
The required fields are:

- How did the applicant meet your Initial criteria: *
- Indicate applicant match final criteria: *
- Indicate whether or not a qualified applicant eligible for a military preference was considered for interview?: *
- If you did not interview a qualified applicant eligible for military preference, explain why not in the comments box provided; otherwise indicate "N/A".: *

- SSN: *

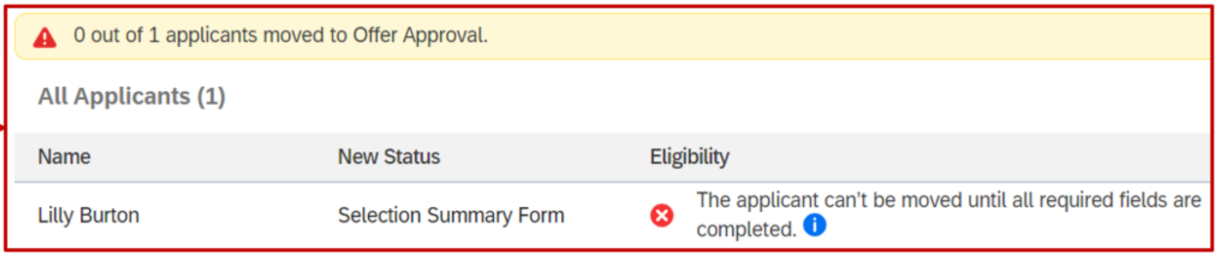
> Note: Do not enter dashes while entering the Social Security number.

After entering the information, use the *Save* button to keep your data changes in the system.



> **Note:** If you try to move a candidate before entering information into all required fields (*), you will receive an Error message in the *Move Applicants* window.

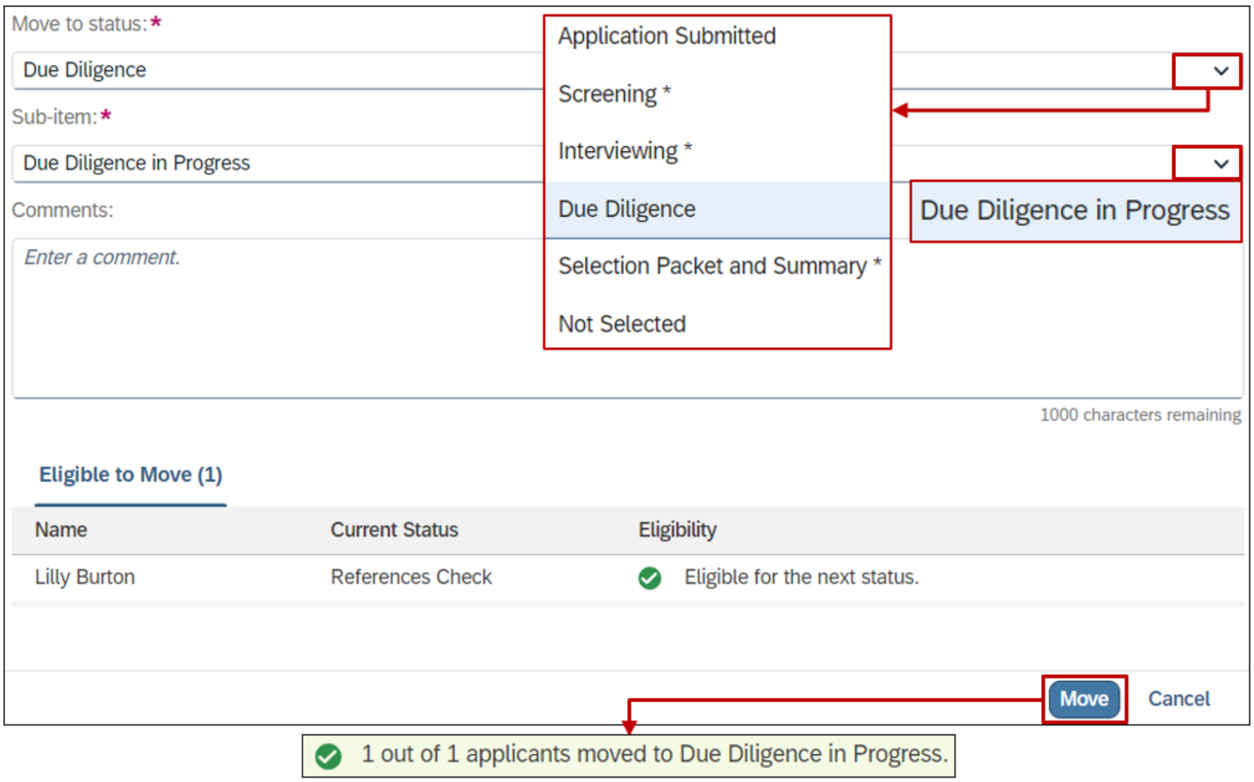
Note: If you try to move a candidate before entering information into all required fields (*), you will receive an Error message in the *Move Applicants* window.



Disclaimer: If you are in the legacy Talent Pipeline view, make sure to toggle back to the New Applicant Management Experience view by enabling the New Applicant Management Experience button.

8.9.5 Due Diligence

The Hiring Manager will only move the applicant to the *Due Diligence* status (if necessary) and will **not see** additional Due Diligence specific information fields in status. The background of the applicant will then get evaluated, diligence checks getting done by filling out questions around the legal and financial situation by the **HR Professional** (further information: Roles Definition Sheet).

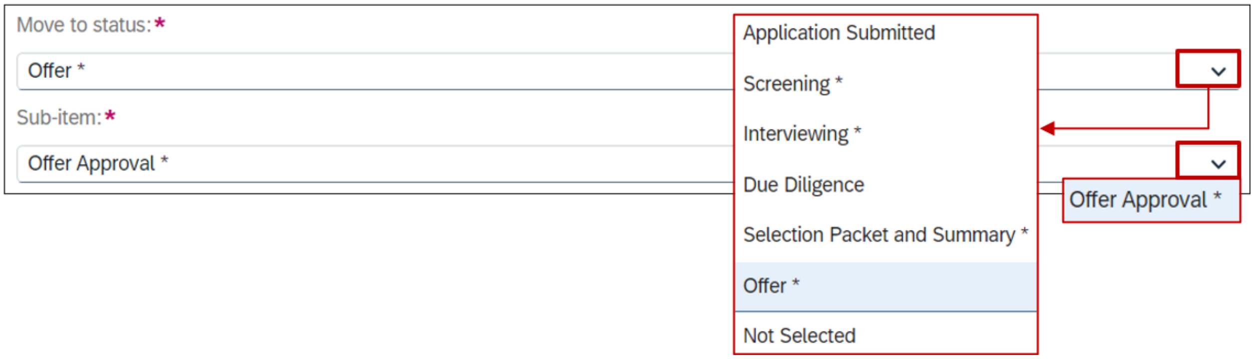


8.9.6 Offer *

When moving a candidate to the mandatory *Offer* stage, it is necessary to define job offer details and complete the internal approval process for the respective offer. There are two mandatory sub-statuses to update *Offer Approval* and *Offer Approval Complete*.

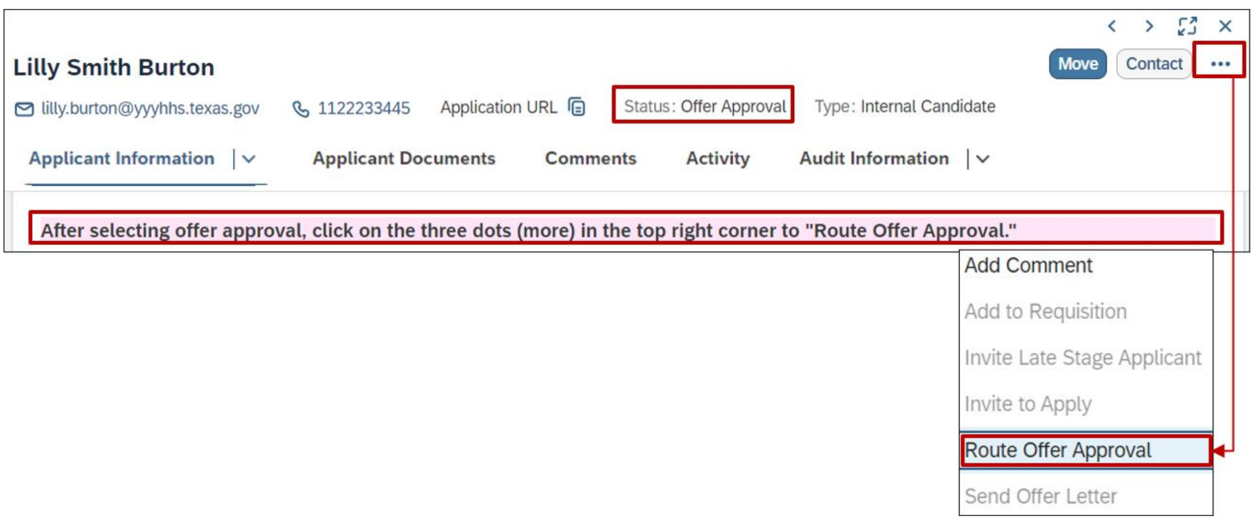
8.9.6.1 Offer Approval *

From the previous *Selection Summary Form* status, move the candidate to the *Offer Approval* sub-status to begin the *Offer* process for the candidate.



To continue the process after landing in the *Offer Approval* sub-status, follow these steps:

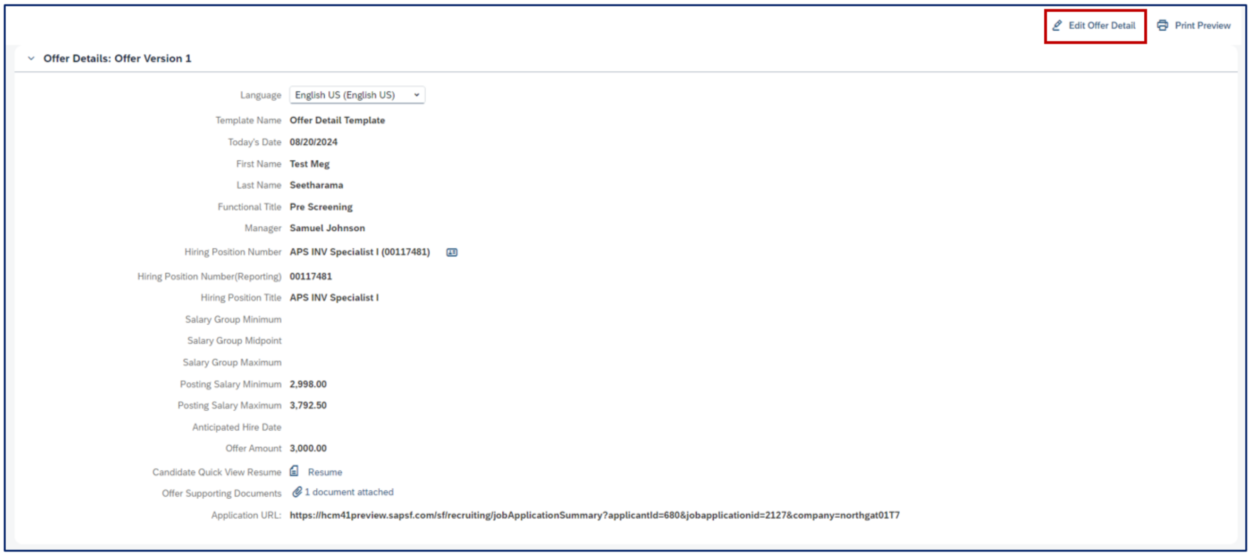
1. Select the three-dot *More* in the top right corner of the area. This instruction will also be displayed at the top of the *Applicant Information* section when the *Application Status* is ***Offer Approval***.
2. Select *Route Offer Approval*.



> **Note:** If a Hiring Manager needs to revise an offer, the Hiring Manager will need to move the Candidate back to the Offer Approval stage and then select Route Offer Approval and continue with the regular process.

8.9.6.2 Offer Approval: Offer Details

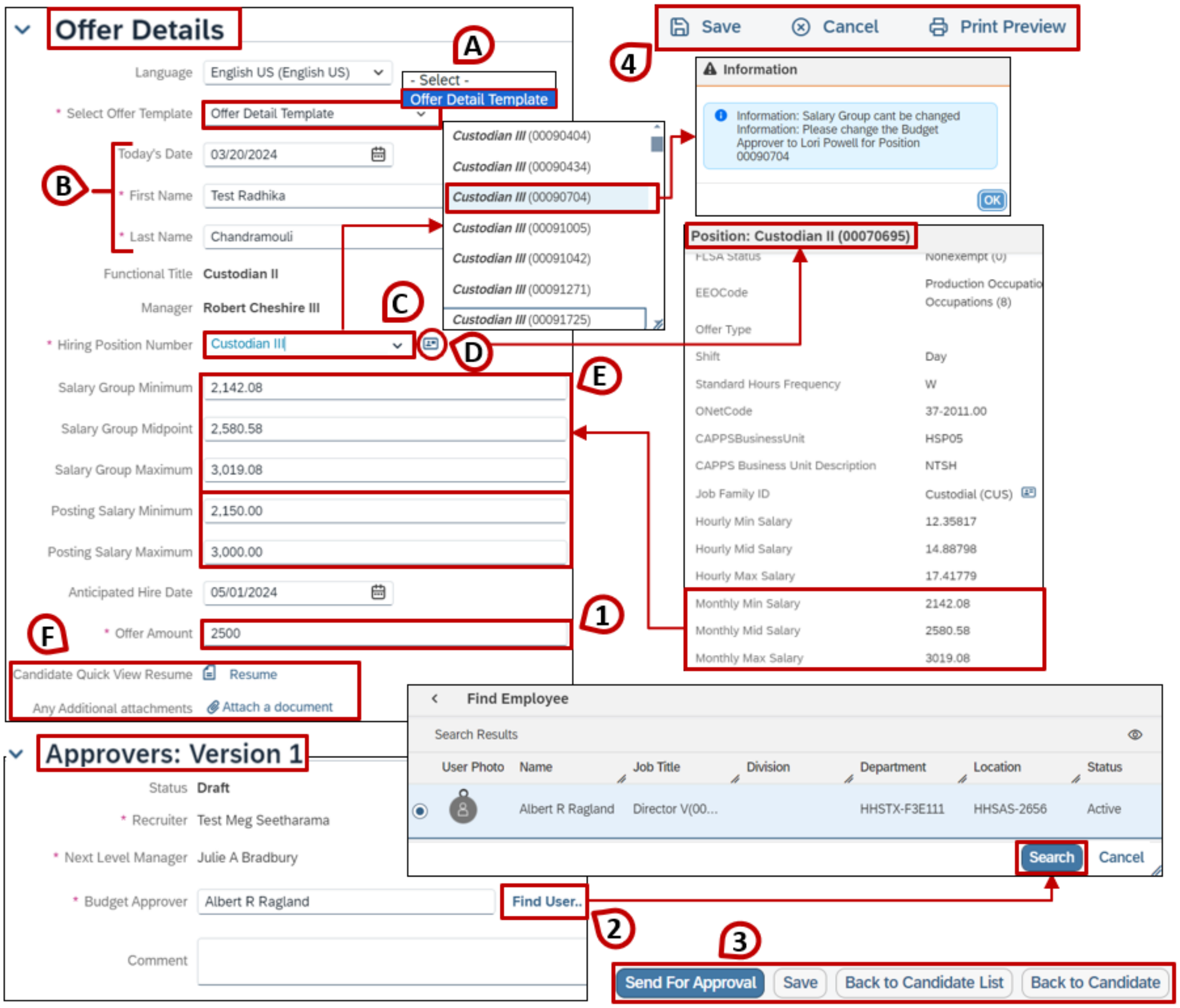
After clicking on *Route Offer Approval*, you will be on the Offer Details page and Click on *Edit Offer Detail* to complete the missing information.



To set the offer details up for the approval process, follow these steps:

1. Fill out the *Offer Amount* field as it will appear empty. Take the position level and salary range defined as guidance. A value outside of the group range will result in an error message and the *Offer Amount* should be corrected.
2. In the ***Approvers: Version 1*** section, only the *Budget Approver* field will be editable and prepopulated based on the Budget Approver from the CAPPS table maintained by your agency's position control. If the Budget Approver is out of the office, contact your Staffing Coordinator to update to ensure your offer approval is not delayed.
3. When all mandatory fields are filled, the offer can be *Send For Approval* or *Saved* for now. After you send out for approval, a *Confirmation* window will pop up to confirm and progress. By selecting *Back to Candidate List or Back to Candidate*, the entered offer details will **not** be saved and the system will redirect to the candidate application area.
4. Optionally, the *Save and Cancel* buttons on the top right can be utilized as well as the *Print Preview* option, which allows to print or save the offer details as a document.

Hiring Managers won't be able to move the candidate to next sub-stage until **all** approvers have approved the *Job Offer*.



A. **Select Offer Template**: A preconfigured *Offer Template* needs to be selected. Currently there is only one template available (*Offer Detail Template*) to select in the system.

B. **Today's Date, First Name and Last Name**: Display of prefilled candidate name and current date (date of the offer). Update the date if needed. Updating the name will lead to error messages.

C. **Hiring Position Number**: The Hiring Manager can update the offered position here, e.g. if the candidate meets the criteria for a higher-level position. After updating it, a pop-up message will appear, saying that the *Salary Group* values can't be changed, but they will get updated automatically based on the new position details anyway. The message might also remind the Hiring Manager to update the *Budget Approver* (if applicable).

> **Note:** *Career Track* positions have multiple levels. Only lowest level positions get posted. Hiring Managers decide which higher-level position should be offered based on gathered information about a candidate (e.g. Project Manager **II** instead of Project Manager **I**).
>
> The **position number** used as a base for the JP needs to be updated if the *Number of Openings* defined during the initial updates of the JP requires additional candidates to hire. Hence, Hiring Managers can use **same position title and level** with a **different code**.

D. **View Position**: Review position details by selecting the button next to the *Hiring Position Number* field. Notice that the *Salary range* values get carried over to the offer details.

E. **Salary range**: The *Salary Group* values are determined by the position details and can't be modified. *Posting Salaries* will be displayed based on the defined values in the JP.

F. **Resume and Attachments**: Fields to review the resume and update attached documents.

> **Note:** The *Approvers: Version 1* section will show *Version 1* the first time an Offer is sent for approval. If the Offer needs to be revised and sent again, the section will show as *Approvers: Version **2.*** The number of the version continues to increase based on the times an Offer gets redone.

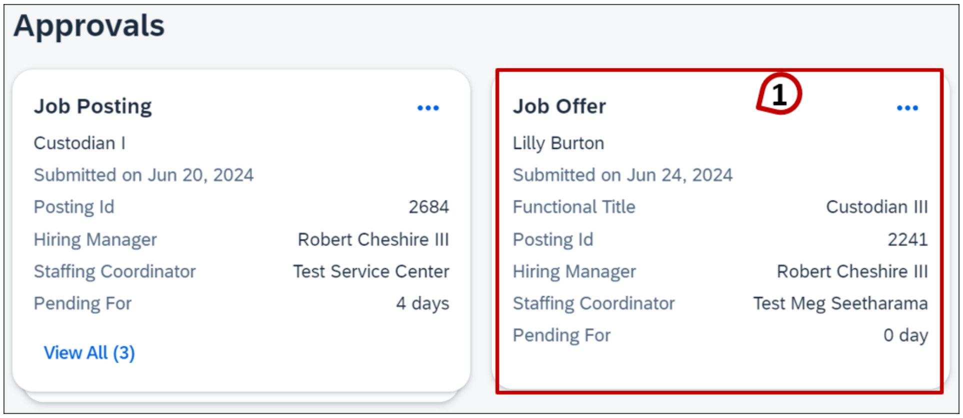
8.9.6.3 Offer Approval: Job Offer Approval

All assigned approvers in the *Approvers: Version 1* section will receive the pending approval, starting with the **Staffing Coordinator**, then the **Next Level Manager** and finally the **Budget Approver**.

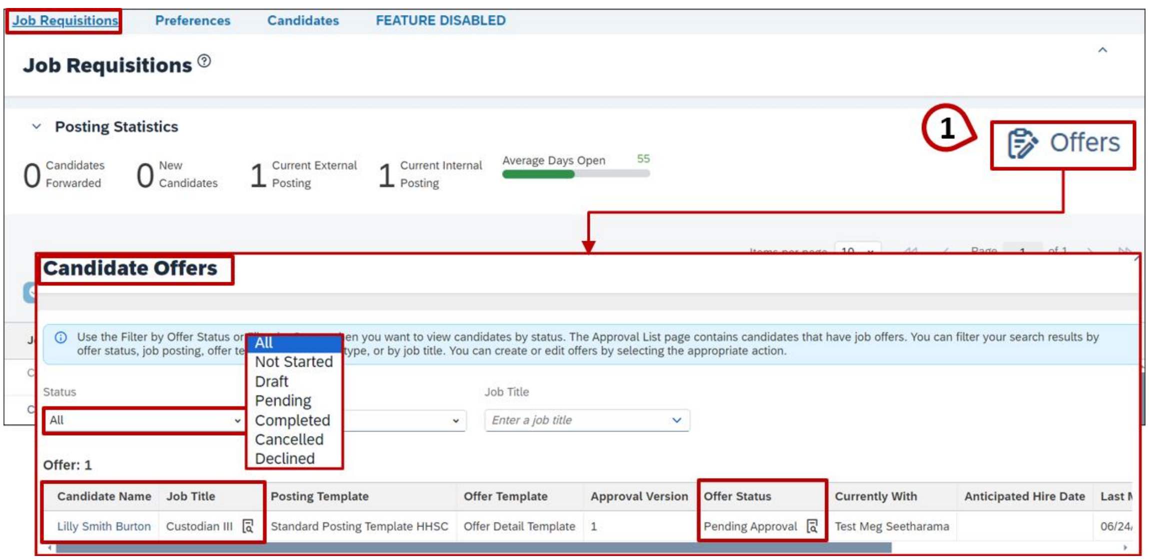
The process description refers to the approval process for *Job Offer Approvals*. It is applicable for **Next Level Manager** (second approver), but also for other approver roles (**Budget Approver**).

To approve the job offer, the approver should:

1. Select the pending *Job Offer approval card* on the *home page or* review pending and completed offers by using the *Offers* link (review **B** in 8.1.1 Job Requisitions) in the general *Job Requisitions* tab of the *Recruiting* section.



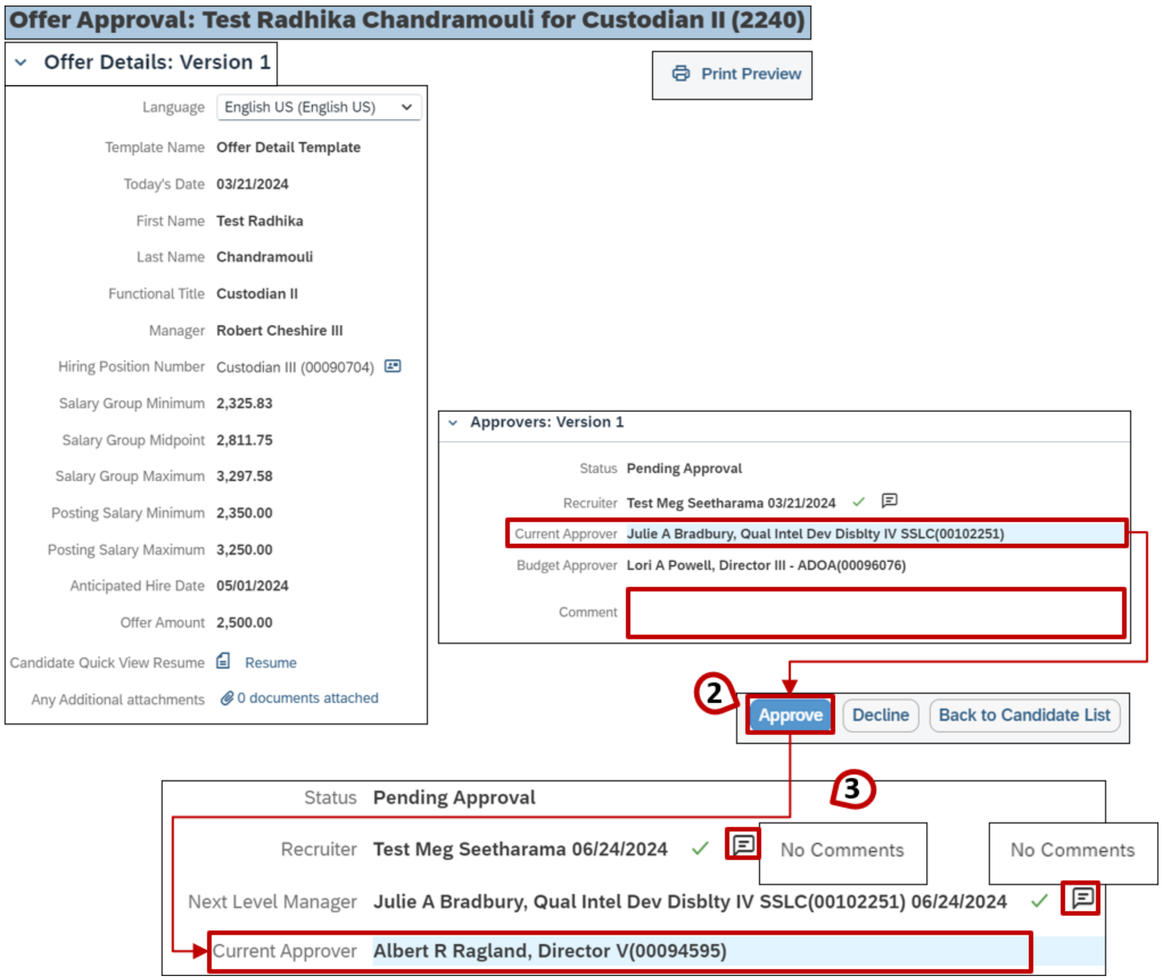
OR



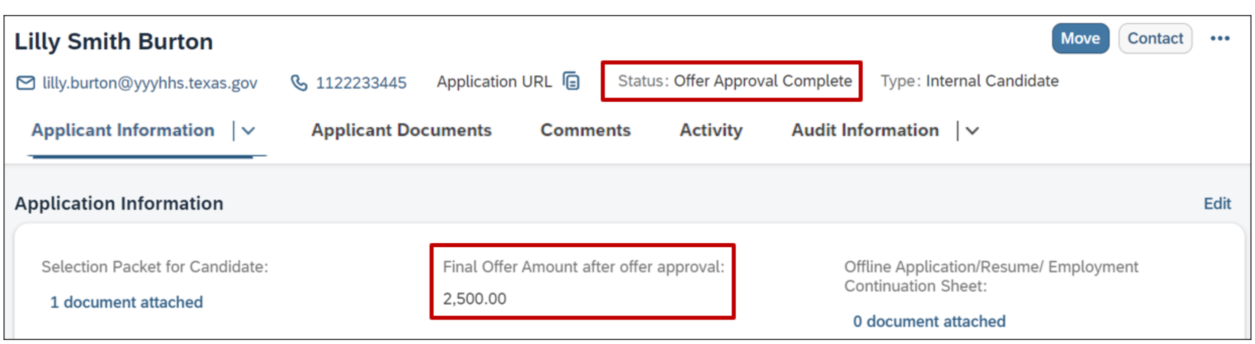
> **Note:** If multiple *Offers* with different statuses are listed, filter them by using the *Status* drop-down menu.

2. Before selecting *Approve* on the next screen, review the offer details and leave a comment for the other approvers if necessary. Optionally, the approval can be declined by selecting *Decline* and leaving a comment with an explanation (e.g. if identified that the *Offer Amount* was not calculated correctly by the Hiring Manager).

3. After approving, the upcoming approver will be highlighted as *Current Approver*. Comments from previous approvers can be viewed by selecting the *Comments button*.



After the *Job Offer* is fully approved, the status of the respective candidate application will be automatically moved into the (mandatory) sub-stage *Offer Approval Complete* and the *Final Offer Amount after offer approval field* will show the approved value.



Hiring Managers receive automatic email notification in the Career Center anytime a job offer is finally approved by all Approvers and they also receive an email anytime any one of the Approvers denies the offer. Here is the content of these messages:

- **Offer is Denied**

  "Please navigate to your job offer to view the comments."

> **Note:** If an offer is rejected, the Hiring Manager should review the **Comments** section for specific details about the rejection and instructions/guidelines for resolving the issue. This information is provided by the Approver who is denying the offer.

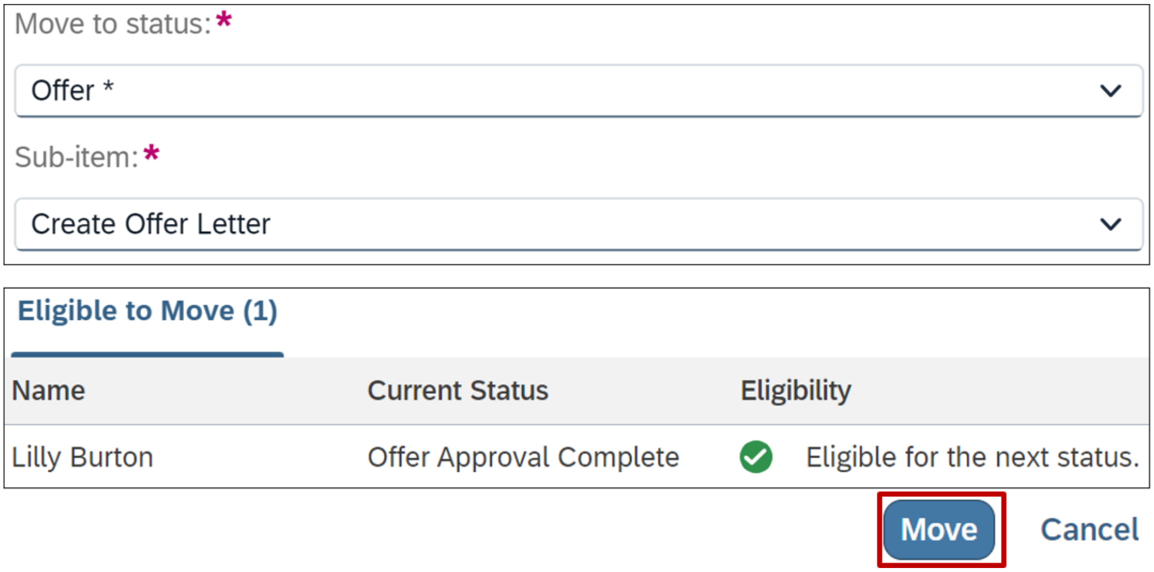
- **Offer is Approved**

  "Congratulations! Your offer has been approved by all approvers. You can proceed to the next steps of **Hired Accepted** and then to **Ready to Hire**."

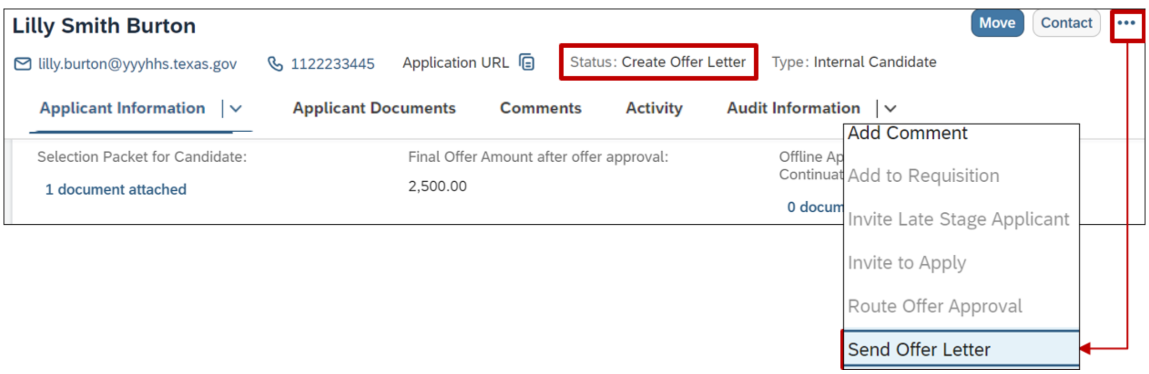
8.9.6.4 Create Offer Letter

This optional sub-status gives Hiring Managers the opportunity to send out *Offer Letters* that can be accepted by candidates. Single *Offer Letter Templates* in the system can be used for every agency of the State of Texas.

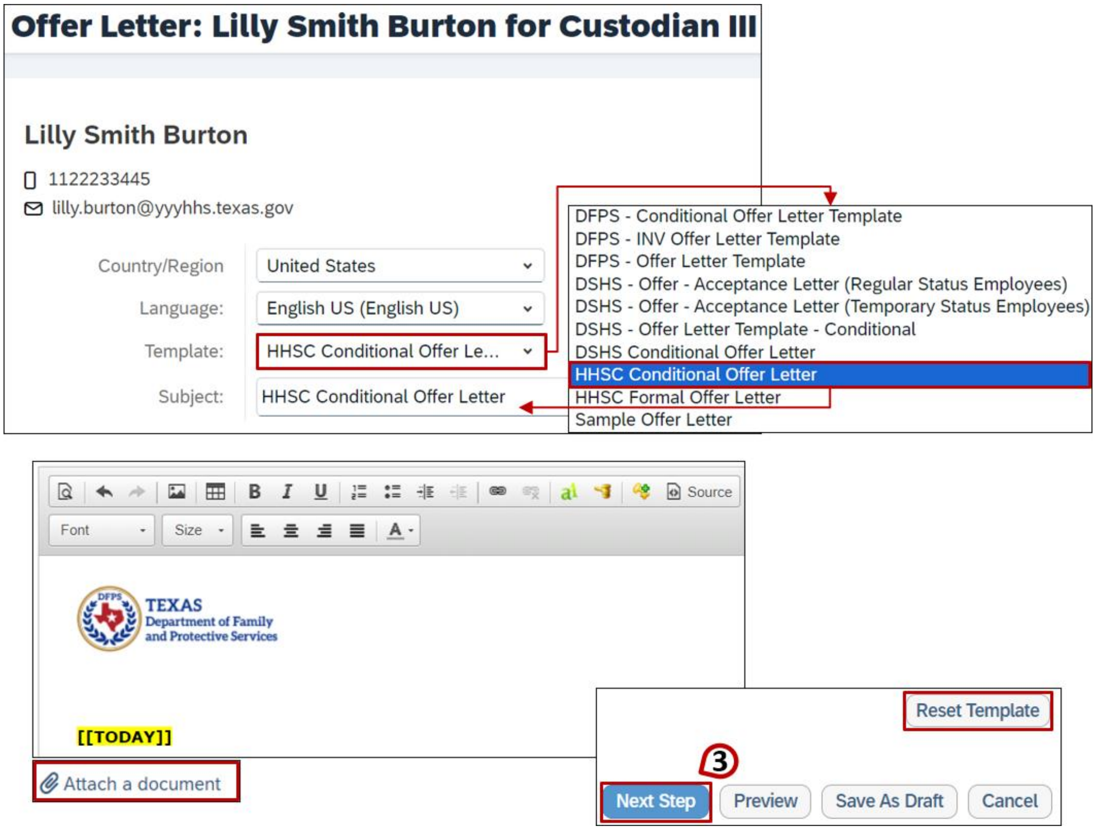
1. Go to the application area of the candidate. Move the applicant status to *Create Offer Letter*.



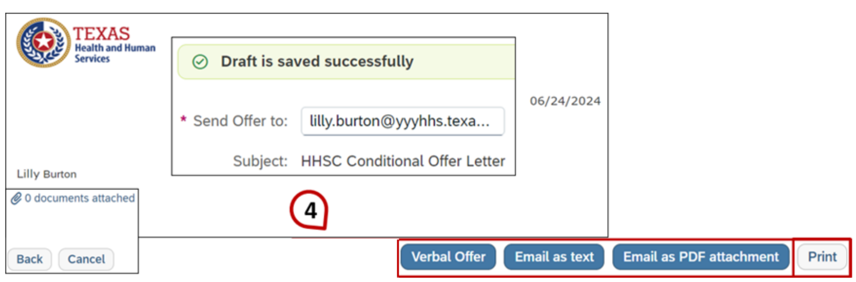
2. From this status, select the *More* menu and select *Send Offer Letter*.



3. On the next page, the offer letter can be prepared and sent to the candidate. Use the *Template* drop-down menu to select a predefined template (e.g. *HHSC Conditional Offer Letter*) that will automatically update the subject name to be same as the template name and update and prepopulate the letter body. This **can** also **be manually updated**. *Attach a document* can be used for additional relevant documents and if changes should be reverted, use the *Reset Template* button, otherwise select *Next Step* to proceed.



4. A message will show that the offer letter was automatically *saved successfully* as a *Draft*. The preview of the letter body will be displayed. Send the offer as a *Verbal Offer*, *Email as text* or *Email as PDF attachment*. The *Print* button will allow you to print or save the offer letter as a PDF file locally.



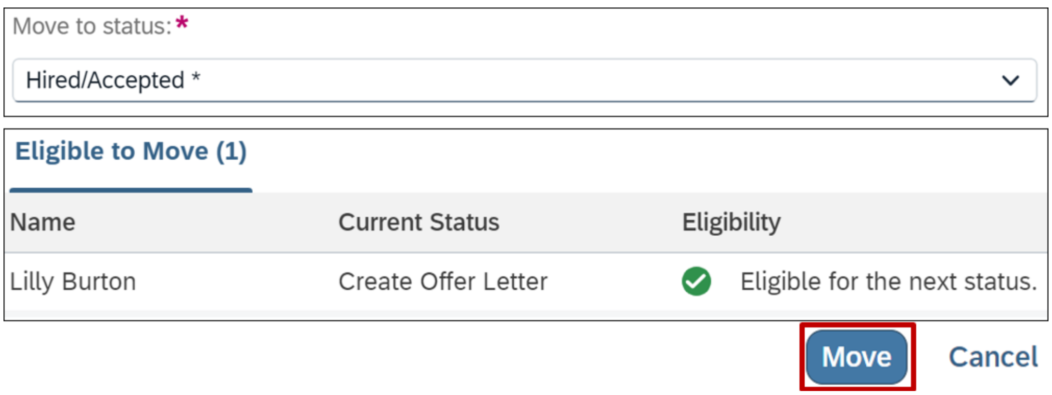
5. After selecting e.g. *Verbal Offer*, check the message content again on the next page. Select the *Next* button to proceed.
6. The last preview of the Online Offer Letter will be visible. To proceed with the process, select the *Send* button.

Once the Hiring Manager hears from the candidate that the offer has been accepted, the candidate can then be moved further along in the Pipeline process. The Hiring Manager can choose the optional sub-stages of Offer Accepted, Offer Declined or Reference Check – DFPS.

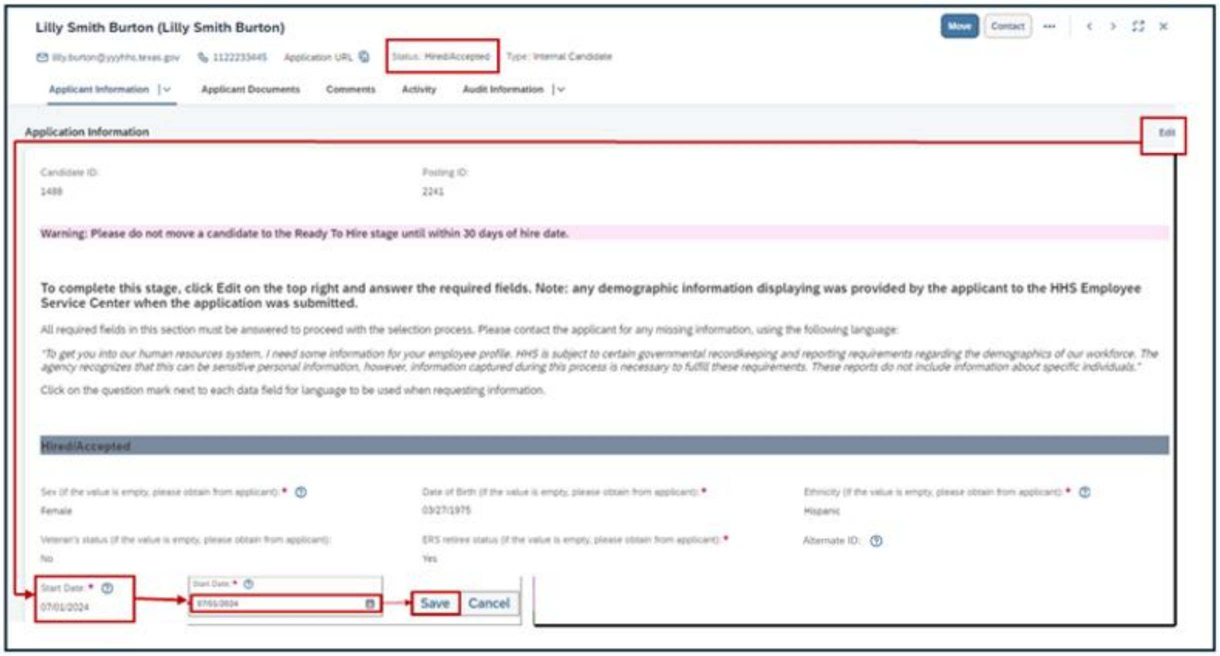
> **Note**: The Reference Check – DFPS is required for DFPS and other agencies should just skip this stage in the Pipeline.

8.9.7 Hired/Accepted *

The next mandatory status is *Hired/Accepted*. Move the candidate from the application area of the saved *Create Offer Letter* sub-status.



1. Back in the Application Area of the candidate, notice a *warning message* to keep the candidate in the Hired/Accepted status and align the move to the next status (*Ready to Hire*) **only if** the chosen **Start Date** of the candidate will be **less than 30 days in the future**.
2. Review the new *Demographic Information* (**PII information**) fields visible under the *Applicant Information* section.
3. All fields should be already populated except the mandatory *Start Date* (Hire Date) field. Enter the desired date in Start Date button and select *Save*.

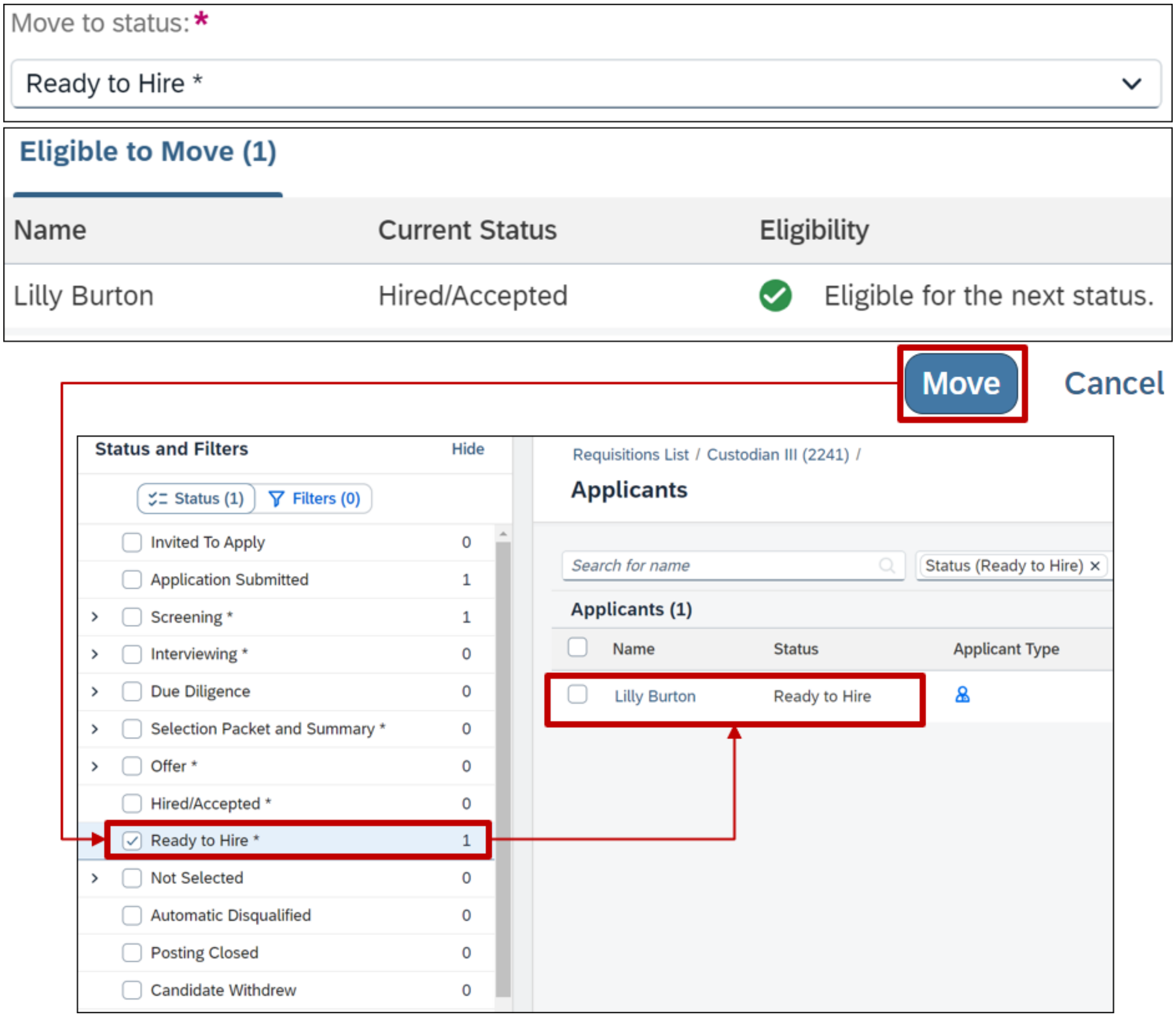


Disclaimer: If you are in the legacy Talent Pipeline view, make sure to toggle back to the New Applicant Management Experience view by enabling the New Applicant Management Experience button.

8.9.8 Ready to Hire *

This is the last mandatory status of the recruiting process. At this stage, the candidate is ready to be hired as an employee of the State of Texas. Follow the steps below to complete the process. Move the candidate from the *Hired/Accepted* to the *Ready to Hire* status. The *Applicant Status Pipeline* will be automatically updated, and the onboarding/hire process can be started.

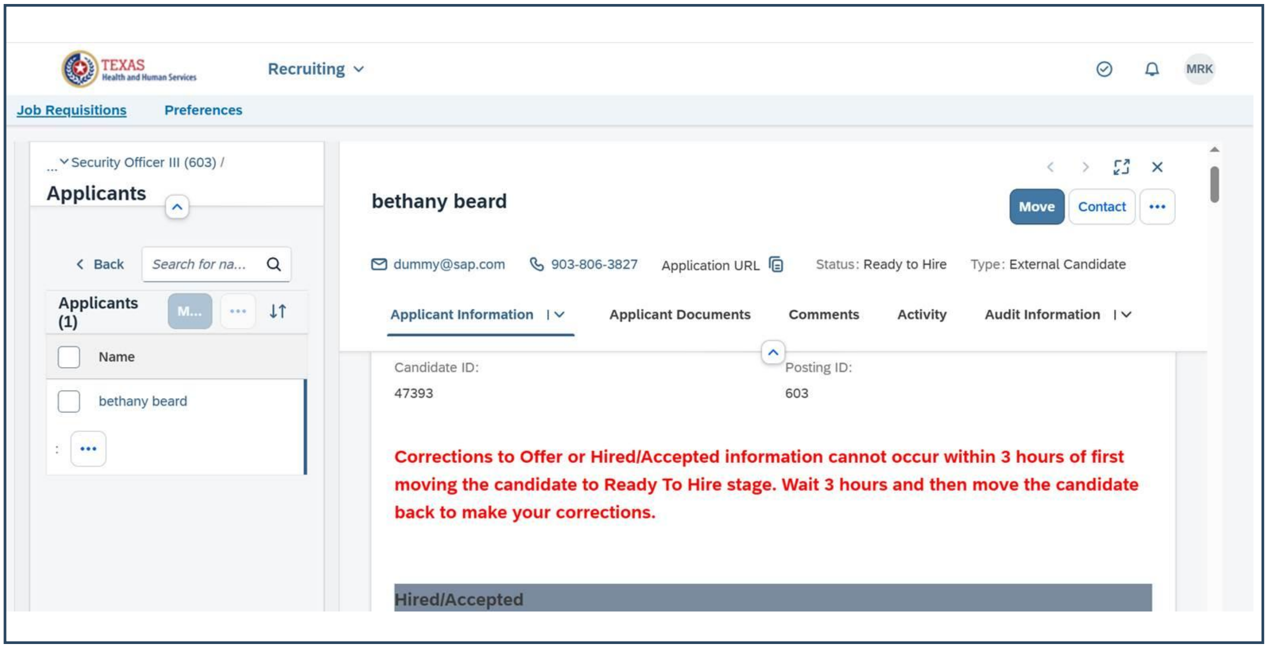
The next step would be for the Hiring Manager to complete onboarding in CAPPS on the new hire's first day.



Note: If the candidate is moved and the *Hire Date* from the previous status (*Hired/Accepted*) is more than 30 days in the future, the system will show an *Alert* message when trying to move to the *Ready to Hire* stage. This will create a delay in Onboarding and will require additional steps. In such case, the Hiring Manager must contact the Staffing Coordinator of the Service Center for assistance or clarification.

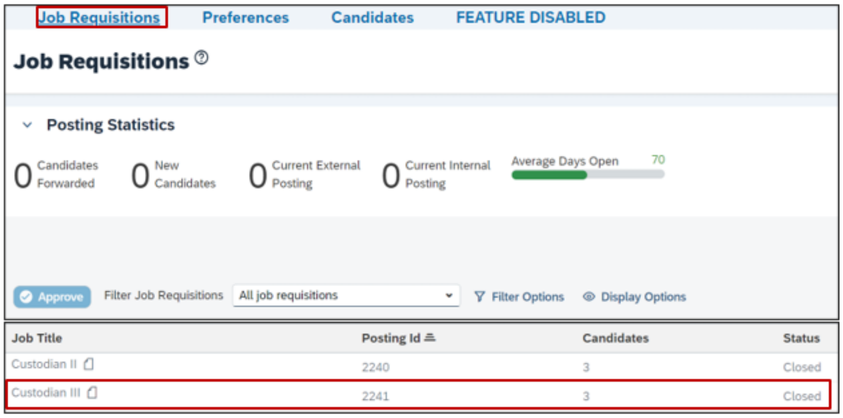
Corrections to Offer or Hired/Accepted Information

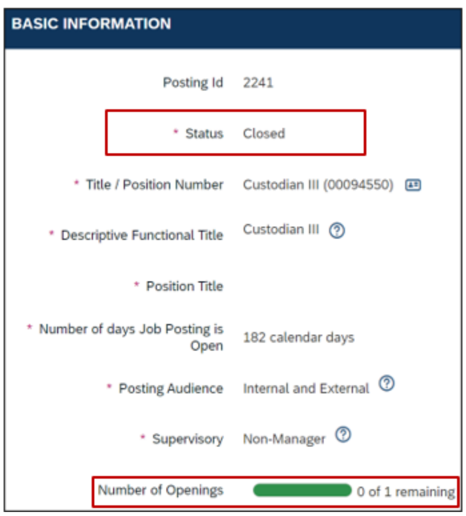
Once the candidate has been moved to the Ready-to-Hire stage, you need to adhere to a time constraint in the system if you need to correct an offer or any information on the Hired/Accepted information. You need to wait for three hours from the time you moved the candidate to the Ready-to-Hire stage before you can move the candidate back in the pipeline for any edits that are needed. See reminder message below in red font.



If the candidate was the last one to fill the *Number of Openings* for this JP (review: letter **F** in 8.3.2 Basic Information), the system will show a pop-up message to inform the user about the last opening, which gets filled with the movement of the candidate to the *Ready to Hire* stage.

When checking the JP afterwards, the status is *Closed* and the *Number of Openings* will show *0 remaining*. The JP is greyed out in the list of JPs.





Disclaimer: If you are in the legacy Talent Pipeline view, make sure to toggle back to the New Applicant Management Experience view by enabling the New Applicant Management Experience button.

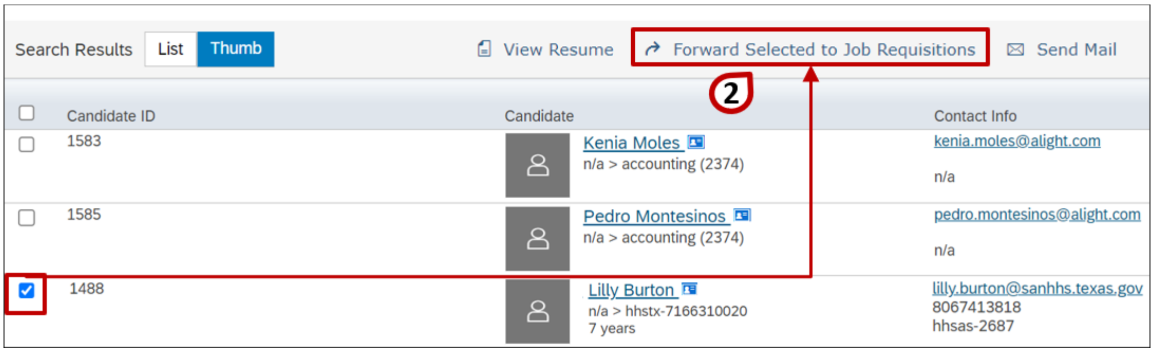
8.9.9 Invited to Apply

Candidates can be searched and forwarded to a Staffing Coordinator so they can invite the candidate to apply for a specific JP. This can be done through the Candidate Search functionality.

> Note: As a reminder, only the HR Professional role will see the Search for Candidates and Candidate Search functionality.

There are two ways to utilize the candidate search functionality, the first one looks like this:

1. Utilize the *Candidate Search* in the general *Candidates tab* of the *Recruiting* section (further information: 8.1.3 Candidates) and 8.5.6 Candidate Search sub-tab).
2. In the specific search results, select one candidate by selecting the *checkbox* for the candidate and select *Forward Selected to Job Requisitions*.



3. Refine the search with available search criteria and select *Search*.

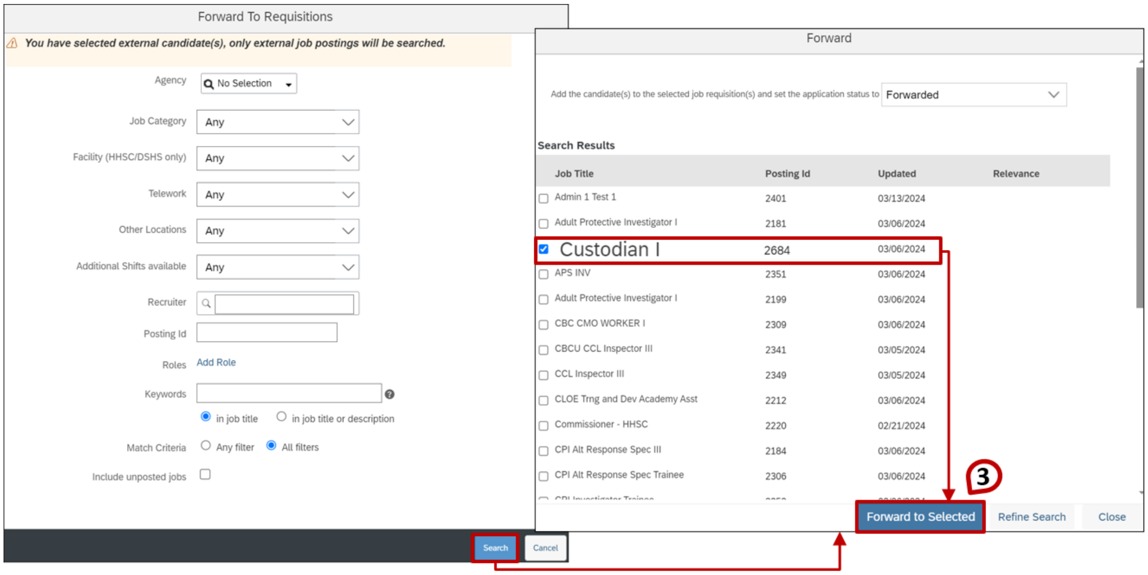
   A. The Forward to Requestions window has the following search criteria:

      a. Agency
      b. Job Category
      c. Facility (HHS/DSHS only)
      d. Telework
      e. Other Locations
      f. Additional shifts available
      g. Recruiter
      h. Posting ID
      i. Roles
      j. Keywords with the options to search:

         (1) In job title

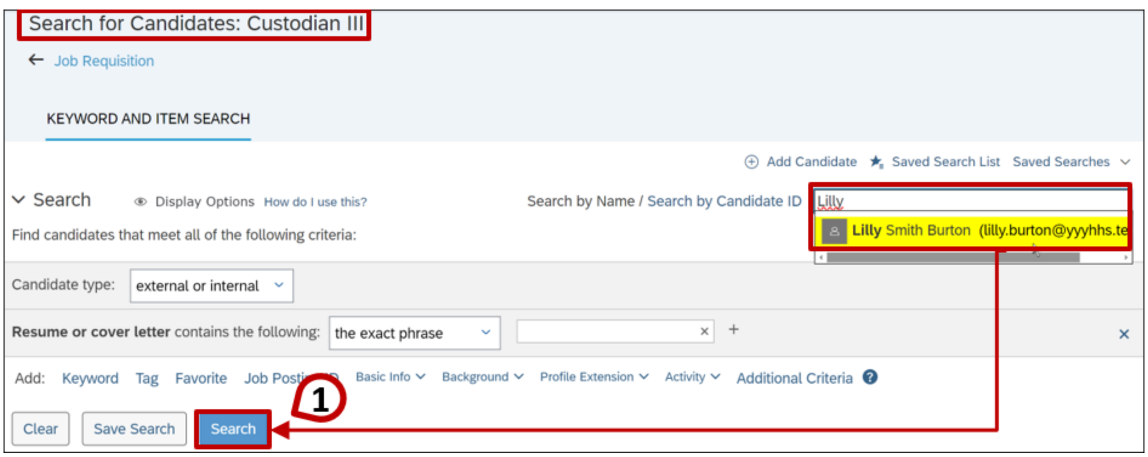
         (2) In job title or description

   From the *Search Results*, choose one or more JPs that the candidate should be forwarded/invited for and select *Forward to Selected*. (*Forwarded* means *Invited to Apply*; *Application Complete* means *Application Submitted*).

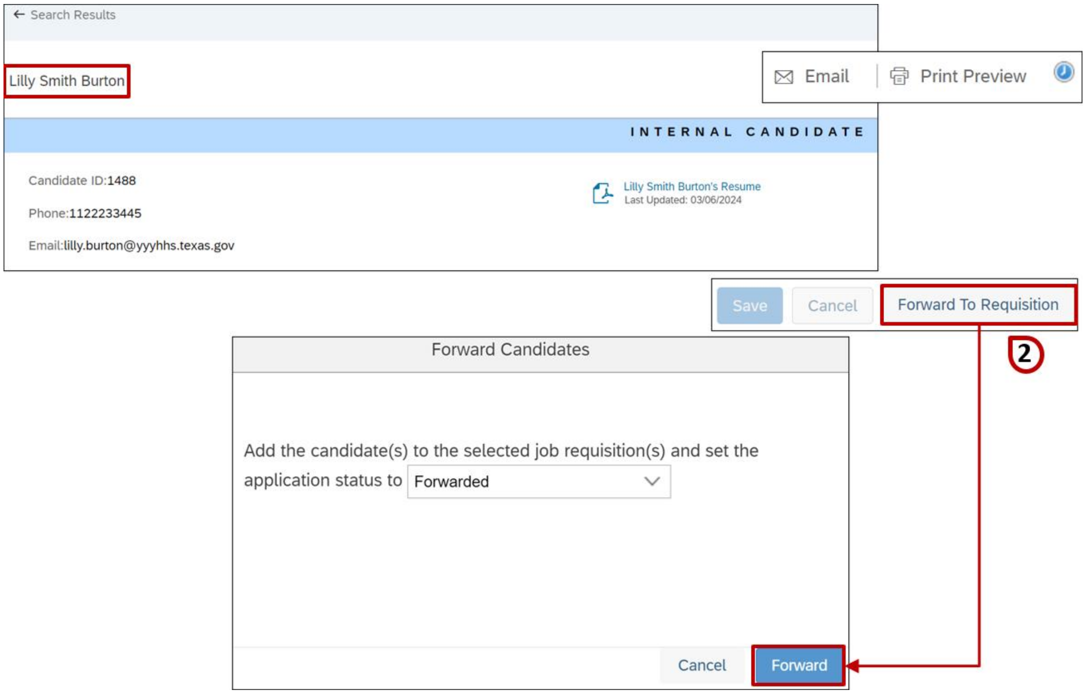


The second way to utilize the candidate search is within the **specific** JPs:

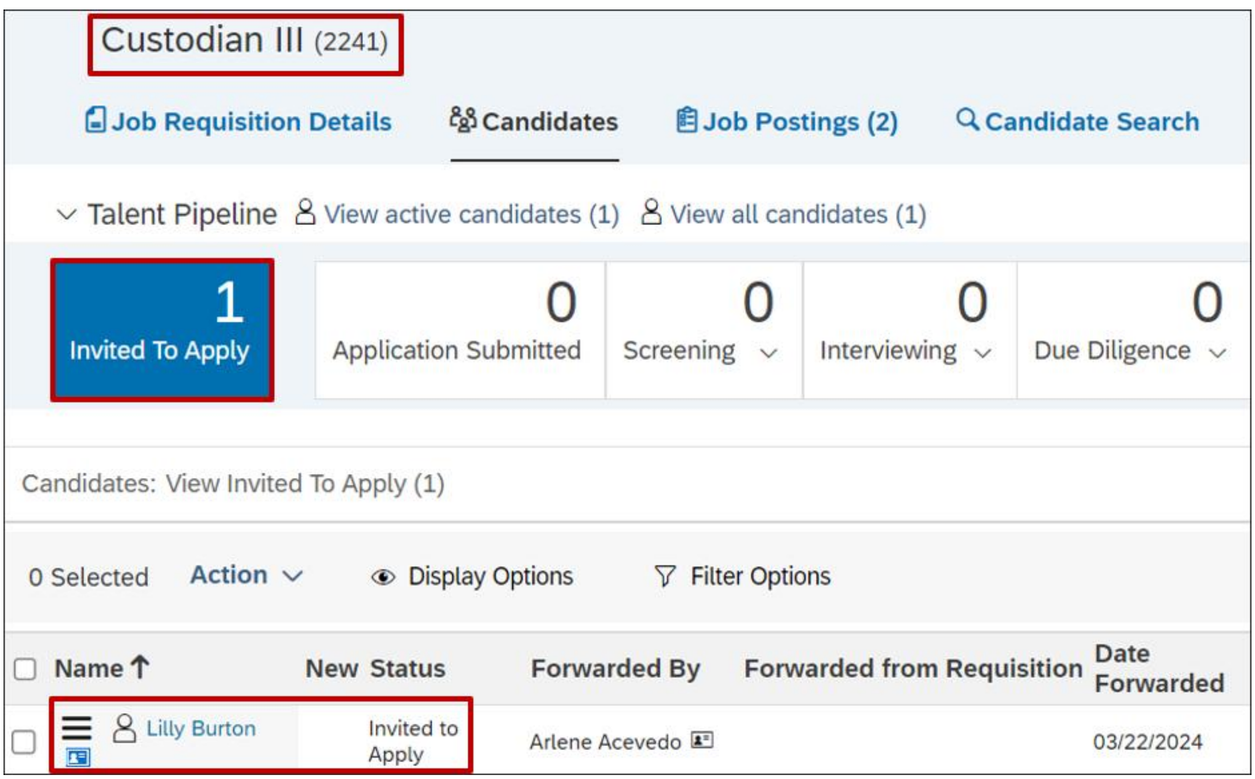
1. Go into a specific (active) JP and then to the *Candidate Search* sub-tab (review: 8.5.6 Candidate Search sub-tab) to *Search* for a candidate (e.g. search by candidate name).



2. The search should end at the candidate profile of a specific candidate. Select *Forward To Requisition* to complete the steps in the system as a Hiring Manager.



If the candidate gets forwarded for a JP and the **Staffing Coordinator** was contacted and moved the candidate into the *Invited to Apply* status of the respective JP, it will be reflected in the *Applicant Status Pipeline*.



If the candidate decides to apply for the JP, the candidate needs to actively apply online or offline for the respective JP. Once the candidate has applied, the candidate will be shown in the *Application Submitted* stage and the regular recruiting process will start (review: 8.9.1 Application Submitted).

8.10 Other Pipeline stages

Besides **active** Talent Pipeline stages, candidates can be moved manually or will be moved automatically to **passive** stages, e.g. because their application got rejected, disqualified, cancelled or withdrawn.

8.10.1 Not Selected

Here you will find the candidates who have been rejected from the selection process due to different reasons. As shown in the previous chapters for the status pipeline stages, candidates can always be moved to the *Not Selected* stage from any other stage they are currently in.

To move a candidate, utilize one of the methods described in chapter 8.8 Move Applicants.

After the candidate is in the *Not Selected* stage, select one of the matching sub-statuses and move the candidate there.

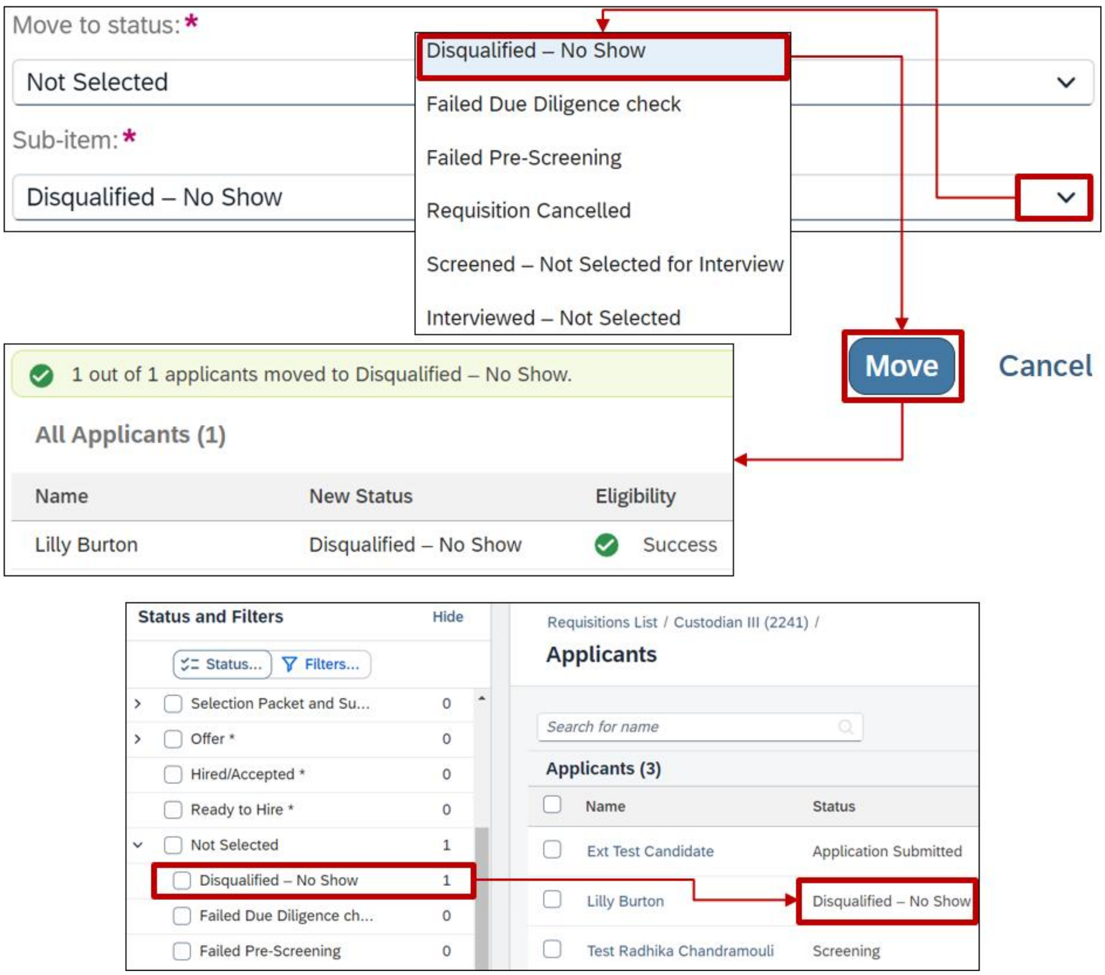
- Disqualified – No Show
- Failed Due Diligence Check
- Unfavorable Reference Check
- Failed Pre-Screening
- Candidate Non-Responsive or Declined Offer
- Requisition Cancelled
- Screened – Not Selected for Interview
- Applicant Declined Interview
- No Show for Interview
- Interviewed – Not Selected

8.10.2 Automatic Disqualified

This stage shows candidates who have been automatically disqualified from the application process if they have **failed** a required assessment during the process.

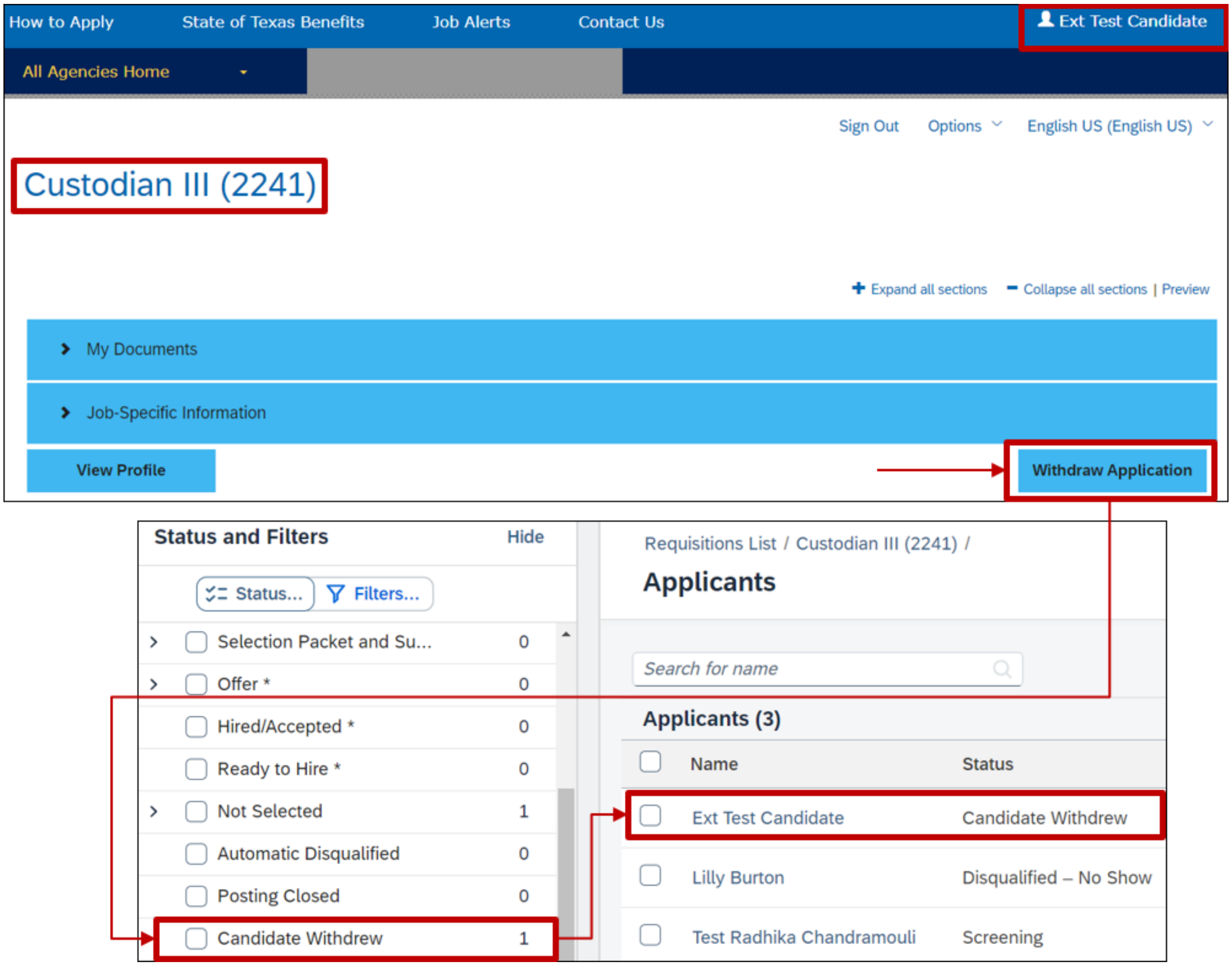
8.10.3 Posting Closed

If it is decided that a JP should be closed (e.g. after finding a suitable candidate, cancelling the position or the *Number of Openings* for a JP reach 0 remaining openings), there could still be candidates currently in an active application process. These candidates will be moved to the *Posting Closed* stage and therefore disqualified for the respective JP.



8.10.4 Candidate Withdrew

If a candidate (who applied **online**) decides that a JP is not personally relevant anymore, there is the option to withdrew an active application through the internal or external portal (review Candidate Guide). Those candidates will be automatically moved into the *Candidate Withdrew* stage and will not be considered for the job further on.



9. Reporting Center

This section will walk you through the ***Reporting*** section of the platform.

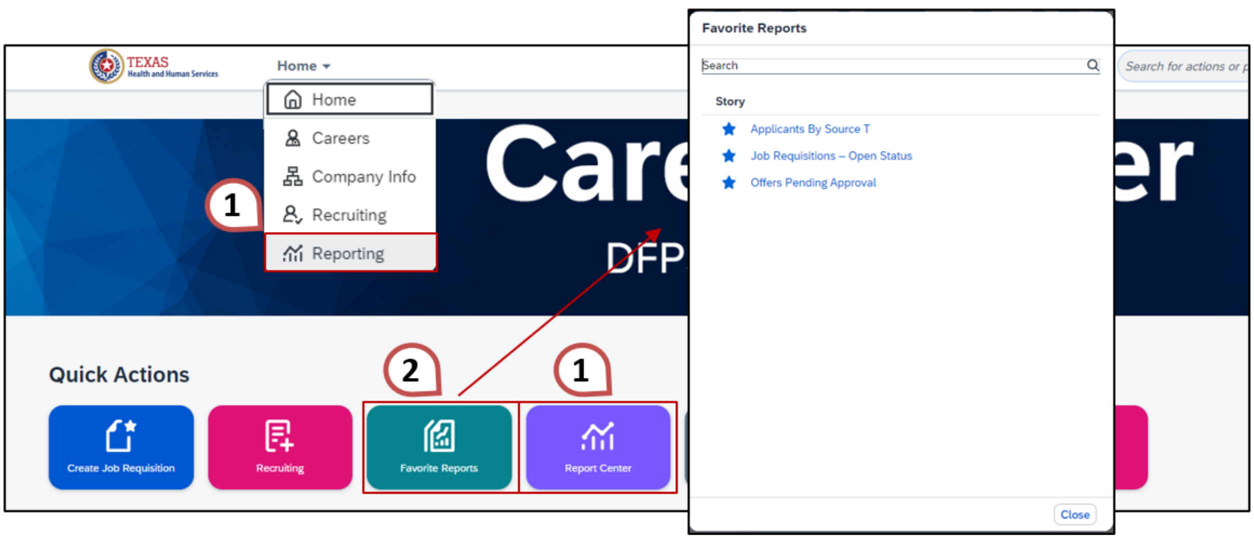
SuccessFactors *Reporting* will:

- Centralize all the reporting components from different analytical tools.
- Edit and run reports from a central location.

9.1 Overview of Report Center

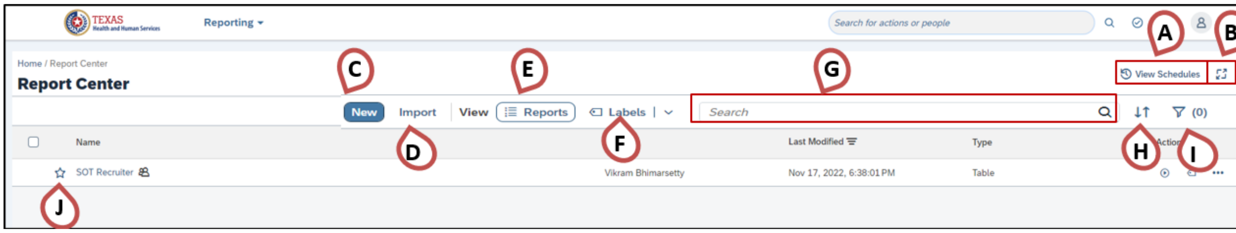
The Report Center centralizes all the reporting components from different analytical tools in Career Center. This centralization allows you to edit and run reports from a central location.

9.1.1 Access to Report Center



1. Access to the Report Center from your homepage, click on the menu and then on Reporting, or go through the Quick Actions button.
2. In the Quick Actions button Favorite Reports, the user can access the reports saved previously as favorite reports.

9.1.2 Report Center basic navigation



A. **View Schedules**: Click the button to view list of schedules available in your instance or created by you. You can also view the list of jobs based on its occurrence set by you while creating a scheduling.

B. **Full Screen**: Click the button to view the Report Center page in full screen.

C. **New**: Click the button to create a new report.

D. **Import**: Click the button to import an XML report in to Report Center.

E. **Reports**: Click the button to view the report list independent of the label tagged to a report name.

F. **Labels**: Click the button to view the reports under the label to which it is tagged.

G. **Search**: Type the required report or author name in the Search text field and press Enter to search.

H. **Sort**: Click the button to sort the report list in ascending or descending order based on the column:

   a. Name

   b. Author

   c. Last Modified

   d. Type

I. **Filter**: Click the button to filter the report based on the:

   a. Report type

   b. Author of the report

   c. Last modified date of the report

   d. Labels tagged to the reports

J. **Favorites**: This button precedes the report name. When you click on the button, the report is marked as a favorite report that you can access from the home page.

K. **Shared**: This button is next to a report name and indicates that the report is shared with another user, group, or role.

9.2 Reports

With the Reporting Center Hiring Managers have access to 12 Standard Reports. There are presentation-style reports that use charts, visualizations, text, and images to describe the data. This data will be based on each person's access level.

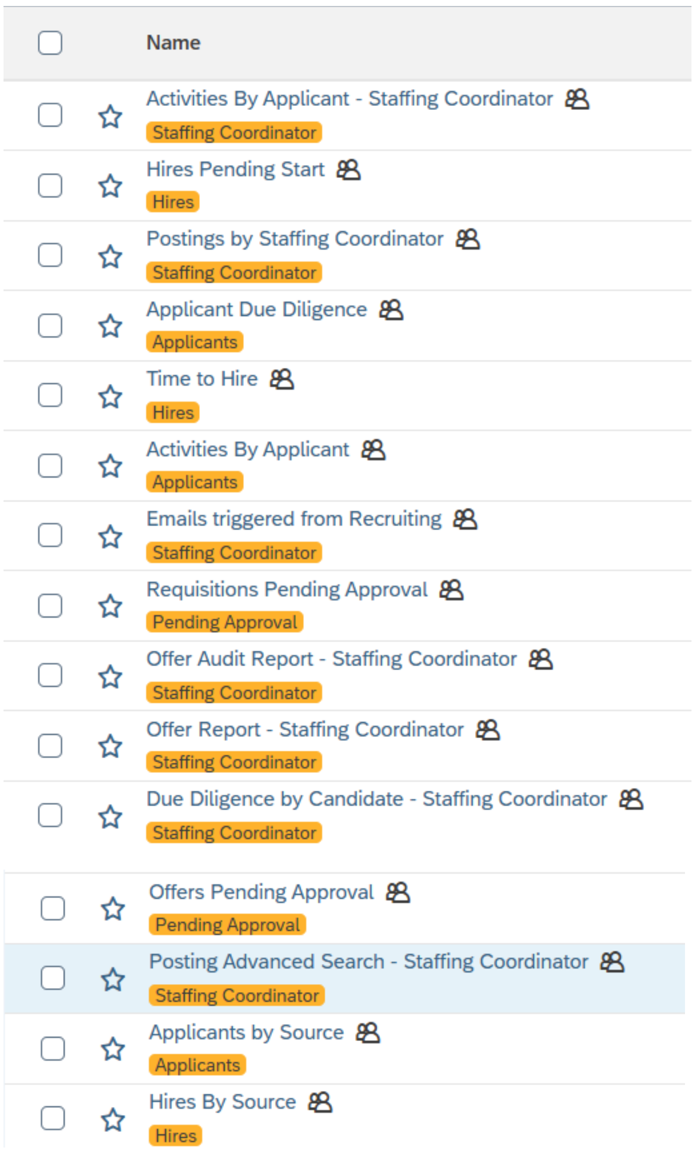
The reports are categorized by four labels: Staffing Coordinator, Hires, Applicants, and Pending Approval.

Here are the Standard reports visible for the Hiring Manager:

- Applicants by Source
- Activities By Applicant
- Hires By Source
- Hires Pending Start
- Time to Hire
- Requisitions Pending Approval
- Offers Pending Approval
- Activities by Applicant – Staffing Coordinator
- Postings by Staffing Coordinator
- Applicant Due Diligence
- Emails Triggered from Recruiting

- Offer Audit Report – Staffing Coordinator
- Offer Report – Staffing Coordinator
- Due Diligence by Candidate – Staffing Coordinator
- Posting Advanced Search – Staffing Coordinator

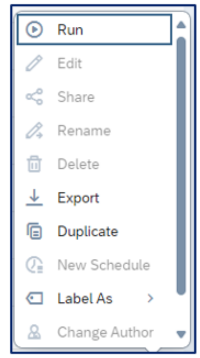
In the Reports view, you will see the reports listed and the corresponding Label they can be found in listed below highlighted in orange.



9.2.1 Reports by Label Category

1. **Hires**
    A. Hires By Source
    B. Hires Pending Start
    C. Time to Hire
2. **Staffing Coordinator**
    A. Activities by Applicant – Staffing Coordinator
    B. Offer Audit Report – Staffing Coordinator
    C. Offer Report – Staffing Coordinator
    D. Due Diligence by Candidate – Staffing Coordinator
    E. Posting Advanced Search – Staffing Coordinator
3. **Pending Approval**
    A. Offers Pending Approval
    B. Requisitions Pending Approval
4. **Applicants**
    A. Applicant Due Diligence
    B. Activities By Applicant
    C. Applicants By Source

9.3 Report Center Actions



A. **Run**: Click on Run to run the report with the actual data and define the date requirements.

B. **Actions**: Click on the Actions button to select what to do with the report, run, duplicate, export, etc.

10. Document Change Log

Version #	Description of Changes Made
Version 17	Updated to reflect new visual design and verbiage for what used to be called the "Legacy Candidate Workbench."
Version 18	Removal of Training Recordings from the Resources section: updates to p. 9, 16; update the name of document to Career Center Hiring User Guide. Updated pages 5, 14, 93, 72 to remove reference to HR Professional Roles Guide with SuccessFactors Roles Definition Document. Decision was made to eliminate the HR Professional Roles doc and combine info into the SF Roles Definition Document.
2/12/2025	Addressed Defects #39, 30 Added introductory paragraph p. 48 explaining the 2 Talent Pipeline views in the Career Center. Reworded text in box page 52. Added reminders at end of each pipeline stage to toggle back to the New Applicant Management Experience View. (p. 70, 77, 78, 92, 96)
2/18/2025	Updated pages 53-54 to reflect changes in relabeling stages to Online Application Submitted and Offline Application Submitted. Added a note to page 54 with historical note. Updated footer date. Updated p. 59 to reflect the 2 places you can find attachments for Offline Applicants – it previously only had one place noted. P 62 updated to "Screening Information"; updated text & new screenshot for Offline Application/Resume/Employment Continuation Sheet section. P. 63 updated screenshot of Employment Info/Former Foster Youth Status area. Added new screenshot to p. 65 to show what it would look like if JP not set up for any pre-screening questions. New screenshot to p. 66 and explanation for the How Fluently? (Legacy) and How Fluently? Sections. P. 63 updated with screenshot and explanation of new "Other Supporting Documents" sections seen only by the HR Professionals. P. 74 updated Note and screenshot for new Applicant History info for HR Professionals only, and p. 28 for new Jobs Applied section.
4/4/2025	From SOT Email req: 1) Ready to Hire stage: added statement to complete onboarding in CAPPS on the new hire's first day. Added Note to p. 85 that this stage where 2 req steps are necessary. 2) Updated entire Selection Packet section to reflect current environment including new screen shots, steps, and add'l info to help users. Added requirements and steps to Selection Packet section about adding Selection Packet for candidate and necessary attachments for those Not Selected. Added screenshot to Selection Summary Form section p.87 to help users understand steps. Defect 47 – updated screenshot p. 102 Defect 48 – updated p. 37 text and screenshot

Version #	Description of Changes Made
7/14/2025	• P. 100 fixed grammatical error "To proceed with the" (added with) • P. 55 updated to remove the sub-stages of Offer Accepted & Offer Declined. Removed "On hold" stage after Selection Packet and Summary. Relabeled as "Screened – Not Selected for Interview" and added "Interviewed – Not Selected." Changed to "Selected for Interview, added Interview Scheduling*, reworded to References Check, added Conditional Offer Letter – HHSC & DSHS at Interviewing stage. • P. 6 updated – updated Process flow #6 to Online Application Submitted / Offline Application Submitted, removed updated the visual graphic to reflect these changes. (and removal of On Hold) • Updated verbiage to Selection Packet (versus Package) • P. 6 -7 updated to say Career Center instead SuccessFactors • P. 78-79, 101 updated to remove Offer Accepted/Offer Declined and updated lots changes to Pipeline to reflect current standing • P.55 updated to reflect current pipeline changes • P. 80-81 updated to reflect current required stages & name of 1st stage; updated graphic on p. 81 • P. 98 add info on automated emails sent to Hiring Mgr once offer is approved and if it's denied. • P.94 added Note about Offer Approval stage is where you need to go to revise an offer. • Updated TOC • P. 99 added details about email notifications sent to Hiring Manager when offers are approved and when Approver denies. • Updated p.83-84 Interviewing stage info & graphics so it's current • P. 97 updated label to Next Level Manager • P. 102 updated to remove option for Offer Accepted/Denied & added appropriate new text • P. 33 updated to label field as just Position Number; updated graphic p.47 • P. 58 added Note about new Drag & Drop functionality in May 25 release, screenshot and instructions • P. 26 added disclaimer that Candidate Search functionality only avail to HR Professional role; p. 29 deleted Hiring Mgr note; p. 46 added Note; p. 60 added reminder note; added text p. 107 & note p. 108; p. 22 added note • P. 80 recreated flowchart

Version #	Description of Changes Made
8/5/2025	• Updated with Pipeline changes requested to meet business needs: updated all related images and text changes necessary; added sub-stages for Not Selected option. • Updated Ready-to-Hire stage p. 108 with new screenshot of message in red font and added corresponding text info to explain.
9/12/2025	• Added more info and details around Pre-Assessment Q's • Added Note about Reference Check – DFPS being optional
11/3/2025	Added info to Assessment Questions in Tips, Reminders and Best Practices about the Free Text option and character limits. P.61-63.
1/13/2026	Updated screenshots related to the relabeling of fields and buttons: Manage Columns, Filter, Save, Reports updates and other minor visual updates like Default selection changes. P 22, 23, 24, 27, 28, 72, 76, 97, 142, 143.