Version Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>5/11/2020</td>
<td>Darrell Littleberry</td>
<td>Screenshots from TAM Test environment</td>
</tr>
</tbody>
</table>
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PREFACE

This guide focuses primarily on the steps taken by the hiring managers to start and complete recruitment. It’s designed to be a helpful reference to provide process and procedural guidance, not a complete source of recruitment information. For specific recruitment questions not covered in this document, please contact the UCSB HR employment team.

HIGH LEVEL PROCESS

The end-to-end recruitment process is comprised of three swim lanes for each of the following key process stakeholders.

- Departmental Hiring Manager
- HR – Employment Team
- Applicants (internal/external)

The process starts with the Hiring Manager creating a job opening and ends with submitting the prepare for hire request to UCPath Center to hire the selected candidate.

FIGURE 1 END TO END PROCESS MAP

Department hiring managers will perform the following major process steps.

<table>
<thead>
<tr>
<th>Map Step</th>
<th>Process Step Description</th>
<th>Key Change Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create Job Openings</td>
<td>Job posting is no longer the full job description</td>
</tr>
<tr>
<td>4</td>
<td>Manage Job Openings</td>
<td>No change from current state</td>
</tr>
<tr>
<td>5</td>
<td>Schedule Interviews</td>
<td>Optional but powerful functionality to use</td>
</tr>
<tr>
<td>5B</td>
<td>Enter Interview Evaluations</td>
<td>Will need to notify when candidate is selected</td>
</tr>
<tr>
<td>9</td>
<td>Submit Background Checks</td>
<td>New vendor, Universal, is integrate with TAM</td>
</tr>
<tr>
<td>10</td>
<td>Submit Prepare for Hire</td>
<td>Replaces template base hire for staff non-students</td>
</tr>
</tbody>
</table>
Hiring managers create job openings to recruit human resource talent.

**Process Parameters**

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Process Impact</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position number(s)</td>
<td>Required to save the job opening</td>
<td>The position number(s) is connected to the job opening for downstream processing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Provide key data requirements for job posting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Job posting for candidate gateway with required job description sections</td>
</tr>
<tr>
<td>Job description</td>
<td>Key data to complete the job posting section</td>
<td>These sections are required by HR to complete the job posting for approval consideration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Job posting for candidate gateway with required job description sections</td>
</tr>
<tr>
<td>Required Job Posting Sections</td>
<td>These sections are required by HR to complete the job posting for approval consideration</td>
<td></td>
</tr>
<tr>
<td>Provided by HR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

With process inputs secured, let’s review the two job opening types that can be created.

<table>
<thead>
<tr>
<th>Type</th>
<th>Process Impact</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Job Opening</td>
<td>requires a single position</td>
<td>Facilitates recruiting for typically a single candidate</td>
</tr>
<tr>
<td>Continuous Job Opening</td>
<td>Allows for multiple positions to be added</td>
<td>Facilitates recruiting for multiple candidates</td>
</tr>
</tbody>
</table>
1 - CREATING A STANDARD JOB OPENING FOR SINGLE POSITION

<table>
<thead>
<tr>
<th>Overview</th>
<th>The job opening is the first official step of the recruitment process for hiring managers.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>PeopleSoft Menu&gt;Recruiting&gt;Create Job Opening</td>
</tr>
<tr>
<td>Tab Procedures</td>
<td>Primary Job Opening Information</td>
</tr>
<tr>
<td></td>
<td>Select ‘Standard Requisition’ as the Job Opening Type</td>
</tr>
<tr>
<td></td>
<td>Accept <em>Business Unit</em> default, ‘SBCMP’</td>
</tr>
<tr>
<td></td>
<td>a) Enter the Position Number</td>
</tr>
<tr>
<td></td>
<td>b) Change the defaulted Job Posting Title if desired</td>
</tr>
<tr>
<td></td>
<td>c) Click the yellow Continue button located in lower right corner</td>
</tr>
</tbody>
</table>

**Illustrations**

**FIGURE 2 TAM 101 CREATE JOB OPENING | PRIMARY JOB OPENING PAGE - STANDARD**

**Primary Job Opening Information**

![Primary Job Opening Information](image)

**Notes**

**IGNORE:** The Profile Details section as this is not used in our campus process.

**Job Aid ID**

1.1
2 - ENTERING JOB DETAILS

Overview
This page is long and has many fields for data entry although most are not required to complete the job opening.

Navigation
PeopleSoft Menu > Recruiting > Create Job Opening

Tab
Job Details

Procedures
Complete the Job Details tab below.

a) Do not change the *Template ID
b) Enter *Employee Classification field
c) Enter other job detail fields as desired/required

Illustrations
FIGURE 3 TAM 101 JOB OPENING | JOB DETAILS TAB
Note: The Date Authorized field will be used by HR recruiters to populate the primary consideration date. Hiring managers should not use the field for data entry.
ADDING MULTIPLE POSITIONS TO A STANDARD JOB OPENING

Exceptionally, a hiring manager may need to increase the number of the Available Openings field for a recruitment. TAM allows a standard job opening to have multiple positions if the added positions all have the same:

- Department
- Job Code
- Standard Hours

To add additional position numbers, follow the procedures in: Add Positions

FIGURE 4 TAM 101 JOB DETAILS TAB – INCREASE AVAILABLE OPENINGS
3 - ENTERING QUALIFICATIONS

THIS TAB NO LONGER AVAILABLE

Overview
Hiring managers will complete Work Experience & Education information.

Navigation
PeopleSoft Menu > Recruiting > Create Job Opening

Tab Qualifications

Procedures
a) Select the *Highest Education Level
b) Enter the desired number in Years of Work Experience

Illustrations
FIGURES TAM 101 JOB OPENING | QUALIFICATIONS TAB

Notes
Qualifications are no longer a tab within TAM. Please skip over this section.

4 – SCREENING DATA (NO REQUIRED ACTION)
Overview | There is no action required of hiring managers on the **Screening** tab. Job opening-specific screening questions were deemed out of scope for our initial implementation of TAM.

| Navigation Tab | PeopleSoft Menu > Recruiting > Create Job Opening Screen |
| Procedures | n/a |

**FIGURE 6** TAM 101 JOB OPENING | SCREENING TAB

**Job Opening**

- **Job Opening ID**: NEW
- **Job Posting Title**: BLANK AST 1
- **Job Code**: 004724 (BLANK AST 1)
- **Position Number**: 82192795 (BLANK AST 1)
- **Status**: 006 Draft
- **Business Unit**: SBCMP (UC Santa Barbara Campus)
- **Department**: DOST (DEAN OF STUDENTS)
- **Primary Recruiting Location**: 5118 (UCSB Campus)

**Additional Job Specifications**

**Screening Questions**

<table>
<thead>
<tr>
<th>Question</th>
<th>Question Order</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Work Eligibility</td>
<td>2</td>
<td>View Answers</td>
</tr>
<tr>
<td>Eligible Working Age</td>
<td>1</td>
<td>View Answers</td>
</tr>
</tbody>
</table>

**Applicant Screening**

**Max Total Points**: 6

**Sequence**

- **Screening Levels**
  - **Work Eligibility**

**Notes**

The two questions included on the **Screening** tab are used to assess work eligibility. **Please do not make any changes to this page.**

**Job Aid ID**

1.4

---

**5 - ENTERING THE HIRING TEAM**

**Overview**

The hiring team identifies key stakeholders in the recruitment process.
To enter the required hiring team sections for initial submittal of approval, follow the procedures below,

a) Add recruiters by clicking the Add Recruiter button
   - The recruiter may default automatically

b) Type first name of recruiter in *Name field

c) Check on the Primary checkbox, as needed

d) Add hiring managers by clicking the yellow Add Hiring Manager button

Follow steps b through c above to select the Hiring Manager.

**ENTER HIRING TEAM FOR INTERNAL DEPARTMENT REVIEW (OPTIONAL)**

Hiring managers may want to facilitate an internal department review with other hiring managers before submitting the job opening to HR for approval.

a) Click the yellow Add Hiring Manager button to add hiring managers who you want to grant access for the internal review - See Job Aid Entering the Hiring Team for more procedures. Please note that any additional hiring managers that you add, will be removed during the primary consideration phase of recruitment.

b) Click the yellow Save as Draft button, instead the yellow the Save and Submit.
This action will assign a Job Opening ID with a Status of ‘Draft’
- After about 15 minutes, the added hiring managers should see this Job Opening ID through the Browse Job Openings page.

When your internal department review is complete, remove reviewing hiring managers from the Hiring Team before submitting the job opening to HR for approval.

Notes
- Add Interviewers and add Interested Parties after the primary consideration date has passed and the hiring manager is managing the job opening.

Job Aid ID 1.5
6 - ENTERING THE JOB POSTING

Overview
The job posting is an integral part of the job opening that will be viewable on the Candidate Gateway(s) by applicants.

<table>
<thead>
<tr>
<th>FIGURE 9 TAM 101 REQUIRED JOB POSTING SECTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Posting Sections</td>
</tr>
<tr>
<td>Position Information</td>
</tr>
<tr>
<td>Pay &amp; Work Schedule</td>
</tr>
<tr>
<td>Summary of Job Duties</td>
</tr>
<tr>
<td>Minimum Requirements</td>
</tr>
<tr>
<td>Special Conditions of Employment</td>
</tr>
<tr>
<td>Knowledge, Skills &amp; Abilities</td>
</tr>
<tr>
<td>Job Duties</td>
</tr>
<tr>
<td>Equal Opportunity/Affirmative Action</td>
</tr>
<tr>
<td>Department Marketing Statement</td>
</tr>
<tr>
<td>Desirable Requirements</td>
</tr>
</tbody>
</table>

Navigation
PeopleSoft Menu > Recruiting > Create Job Opening

Tab
Job Postings

Procedures
See integrated procedures in Illustrations section.

Illustrations

a) Click the **Add Job Posting** button from the **Job Postings** tab

b) Select a section *Description Type* to add to the posting

c) Select the section *Visibility* for the added section
d) Select section **Template** to automatically populate information (as setups are available) or enter desired information in the section textbox
   - Optionally use icons to format posting information
   - Complete **Job Posting Destinations** dates for each Destination

e) A **Remove Date** is not required and may be left blank

f) If you enter a number in **Posting Duration (Days)**, TAM will automatically calculate and lock the **Remove Date**

g) Preview the job posting by clicking the yellow **Preview** button

---

**7 - PREVIEWING THE JOB POSTING**

From the **Job Postings** tab, click the **Preview** button (see procedure g above) to view the job posting

a) To view posting sections including Internal visibility, click the link to **Switch to Internal View**

b) Once satisfied with your job opening, submit your job opening to HR for approval by clicking **Return to Previous Page** and clicking the **Save and Submit** button in the bottom left corner of the Job Opening page (not shown below) – See Submitting the Job Offer
This is the preview of the job posting. Of course, your job posting will include all required and desired posting sections to create a full job posting.
Overview
The hiring manager will submit the job opening to HR for approval.

Navigation
PeopleSoft Menu > Recruiting > Create Job Opening

Tab
Job Details

Procedures
See integrated procedures in Illustrations section.

Illustrations

a) To save and submit your job opening for approval, click the yellow Save and Submit button in the bottom left corner to submit the job opening request to HR for approval.

FIGURE 13 TAM 101 JOB OPENING | SAVE AND SUBMIT

Job Opening

Opening Information

*Template ID: 2069
Job Opening Type: Standard Requisition

Created By: Damitl Consultant Littlebaby
Created: 01/17/2020

*Openings to Fill
Limited Number of Openings:
Target Openings: 1
Available Openings: 1

Establishment ID
Business Unit: SBCMP
Company: UCS
UC Santa Barbara Campus
University of California

*Employee Classification: Staff Career
Department: LIBR
Status Code: 005 Pending Approval
Status Reason:

a
After submitting the job opening, the job opening will become available again from the Browse Job Openings page (Status: ‘Pending Approval’), the Activity and Attachment tab will be visible.

**Note:** Immediately after submitting the job opening, you will go back into the job and attach the job description as well as your job approval form or email. Your job will be available in the Browse Job Openings page.

To attach the job description after job opening submittal,

a) Click the yellow Add Attachment button to attach job description and job approval form to job opening.

**FIGURE 14 TAM 101 MANAGE JOB OPENING | ACTIVITY & ATTACHMENTS**

- **Notes**
  - If job opening is Approved: the hiring manager will receive an email notification.
  - If job opening is Denied: the hiring manager will
    - receive an email notification
    - be able to view the denial comments
    - can make required change(s) and resubmit the job opening for approval

To save your work not yet ready to be submitted for approval by clicking the yellow **Save as Draft** button (next to the yellow **Save and Submit** button in bottom left corner of Job Opening page).
Overview
The job openings were posted to both Candidate Gateways (CG) as
setup in the job opening.
- Internal CG accessed via logging into UCPath
- External CG accessed via web link on the world wide web

Navigation
PeopleSoft Menu > Self Service > Recruiting > UC Santa Barbara Careers
(Internal)

Tab
Job Search

Procedures
See integrated procedures in illustrations section.

UCSB employees are internal applicants and must only use the internal CG to apply for
jobs.
Access to the internal CG is granted by logging into UCPath. After logging into
UCPath,

a) Navigate to Self Service > Recruiting > UC Santa Barbara Careers

FIGURE 15 TAM 101 INTERNAL CANDIDATE GATEWAY

Access to the external CG is granted through a web link. External applicants will need
to create a user profile to apply for jobs.

UCSB employees should only use the internal CG to apply for jobs.
FIGURE 16 TAM 101 EXTERNAL CANDIDATE GATEWAY

Notes
The external CG is denoted by the www web address while the internal CG has UCPath self-service navigation instead.

Job Aid ID 10.1
**STEP 1B - CREATING A CONTINUOUS JOB OPENING**

**Overview**
Hiring managers may need to create job openings to recruit for multiple positions. Most of the steps are the same as creating a standard job opening but there are a few differences.

**Navigation Tab**
PeopleSoft Menu>Recruiting>Create Job Opening

**Procedures**
See integrated procedures in Illustrations section.

**Illustrations**

- a) Select ‘Continuous Job Opening’ for the **Job Opening Type**
- b) Click the yellow **Continue** button

**Primary Job Opening Information**

**Job Details**

- **Job Opening Type**: Continuous Job Opening
- **Business Unit**: SBCMP
- **Department**: UC Santa Barbara Campus
- **Position Number**: 
- **Job Code**: 
- **Recruiting Location**: 5118
- **Job Posting Title**: Multiple Cooks Needed

**Profile Details**

- **Job Profile**
- **Profile ID**
- **View Profile**
- Add Job Profile

---

**1 - ADDING MULTIPLE POSITION NUMBERS**

- c) Click the yellow **Add Position** button to add position numbers

**FIGURE 17 TAM 101 CREATE JOB OPENING | PRIMARY JOB OPENING PAGE - CONTINUOUS**

**FIGURE 18 TAM 101 CONTINUOUS JOB OPENING | JOB DETAILS TAB - POSITIONS SECTION**
2 - COMPLETING JOB DETAILS

d) Complete Job Detail tab by entering these required fields for multiple positions:
   - Salary Range From
   - Salary Range To
   - Pay Frequency
   - Currency

When the job opening is saved/submitted, the message below will appear if the fields above are not populated.

FIGURE19 TAM 101 CONTINUOUS JOB OPENING - ERROR MESSAGE

Message

Please enter Salary Range from, Salary Range To, Pay Frequency and Currency for Primary Job Code

OK

FIGURE20 TAM 101 CONTINUOUS JOB OPENING | JOB DETAILS - REQUIRED SALARY INFORMATION
Hiring managers will then enter the **Hiring Team** as described for the standard job opening – See Job Aid **Entering the Hiring Team** for more procedures. After entering the hiring team, the hiring manager will move on to creating the job posting.

**e) Add the job posting by clicking the **Add Job Posting** button**

**FIGURE 21 TAM 101 CONTINUOUS JOB OPENING | JOB POSTINGS TAB**
f) Enter the job **Posting Title** and follow the instructs in the Creating a Job Opening
- For multiple positions, you must create a job posting (e.g., if there were multiple cook positions all at the same level) but you may create multiple job postings (i.e., one for each level of a multiple level recruitment).

g) Click the yellow **OK** button after you have finished adding and entering all of your job Posting Descriptions and **Job Posting Destination** information.
3 - ADDING JOB POSTING FOR EACH POSITION

h) Click the yellow Add Job Posting button to add the next job posting if desired.

Repeat steps e – h above to add additional job posting as desired.

The illustration below is adding a second job posting for the Assistant Cook level. When you’ve finished creating the job opening, click the yellow Save and Submit button to submit to HR for approval.
This is where the position information will be entered for the Assistant Cook level of this recruitment.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Posting Type</th>
<th>Relative Open Date</th>
<th>Post Date</th>
<th>Remove Date</th>
<th>Posting Duration (Days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Website</td>
<td>Internal Posting</td>
<td>On Approval Date</td>
<td>02/07/2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company Website</td>
<td>External Posting</td>
<td>On Approval Date</td>
<td>02/07/2020</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**4 - VIEWING MULTIPLE JOB POSTINGS**

This illustration shows the result of adding a job posting for each cook level.

**FIGURE 25 TAM 101 CONTINUOUS JOB OPENING | JOB POSTINGS TAB - JOB POSTINGS SECTIONS**

---

**Job Opening**

<table>
<thead>
<tr>
<th>Primary Posting Title</th>
<th>Job Posting Title</th>
<th>Status</th>
<th>Job ID</th>
<th>Position Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>COOK</td>
<td>COOK</td>
<td>005 Draft</td>
<td>80523</td>
<td>10066392</td>
</tr>
</tbody>
</table>

**NOTES**

Job Aid ID: 1B.1

---

**JOB OPENING PROCESS NOTIFICATIONS**

<table>
<thead>
<tr>
<th>Item</th>
<th>Email Notification</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The hiring manager will receive an email notification when a job opening is successfully submitted to HR for approval.</td>
<td><img src="https://example.com" alt="Screenshot" /></td>
</tr>
<tr>
<td>2</td>
<td>Below is the Approval email notification</td>
<td><img src="https://example.com" alt="Screenshot" /></td>
</tr>
</tbody>
</table>
The following Job Opening has been "Approved".

Job Opening ID: 2874  
Posting Title: BLANK AST 1

To view this Job Opening, visit:

**NEXT PROCESS STEP**

HR will need to disposition (approve or deny) the job opening request.
COURSE 102 - MANAGING JOB OPENING

STEP 4 – REVIEWING & DISPOSITIONING APPLICANTS

Hiring managers review the application and related information provided by the applicant through the application process. After the primary consideration date has passed, hiring managers will be able to manage their job openings.

Process Parameters
Let’s review the process parameters.

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Process Impact</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary consideration date for applications has passed</td>
<td>Hiring managers will be able to view the job opening via Browse Job Openings</td>
<td>Applicants who are associated with the job opening can be reviewed and managed</td>
</tr>
<tr>
<td>• Check with HR for questions about PC period</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

With this process input secured, let’s review how to manage the job opening including reviewing applicant data, dispositioning applicants, scheduling interviews and more.
1 - SELECT JOB OPENING TO MANAGE

Overview
Hiring managers can select the desired job opening to manage. PeopleSoft Menu>Recruiting>Browse Job Openings

Navigation Tab
n/a

Procedures
a) click the blue Posting Title link to manage the job posting

Illustrations

FIGURE 28 TAM 102 BROWSE JOB OPENINGS PAGE

Browse Job Openings

Search job openings

Filter by

My Association:
- Team Member (13)
- Created by Me (4)
- Hiring Manager (3)
- Primary Hiring Manager (3)

Notes
To see a job opening, you may need to click the Clear All Filters link above as the page defaults to Open jobs.

Job Aid ID
4.1
2 - MANAGE JOB OPENING

Overview
From the Manage Job Opening component, hiring managers will be able to comprehensively manage all recruitment functions.

Navigation
PeopleSoft Menu>Recruiting>Browse Job Openings

Action
Click the blue Posting Title link

Procedures
See the Job Opening Functions below.

Illustrations
Below is the Manage Job Opening component (also referred to as the HM Workbench)

FIGURE 29 TAM 102 HM WORKBENCH

3 - UPDATING THE HIRING TEAM

After the primary consideration date, hiring managers will be able to add interviewers, interested parties and other hiring managers as desired to their hiring team.

a) Click the Details tab
b) Click the Hiring Team
c) Click the yellow Add Hiring Manager button to add additional hiring managers
d) Click the yellow Add Interviewer button to add interviewers
e) Click the yellow Add Interested Party button to add interested parties
Interviewers listed in the hiring team will automatically default into the Schedule Interview page. You can delete defaulted interviewers and add new interviewers in the Schedule Interview page.

Interviewer who are listed in the Schedule Interview page will automatically be able to complete an interview evaluation via Self-Service. If you do not want interviewers to complete an interview evaluation in TAM, delete them from the Schedule Interview page.

Interviewers listed in the Hiring Team tab, are NOT automatically given the ability to complete an interview evaluation via Self-Service.
4 - JOB OPENING FUNCTIONS

Overview
The Manage Job Opening component is the hub for recruiting functions. PeopleSoft Menu>Recruiting>Browse Job Openings

Navigation Action Procedures
Click the blue Posting Title link

Procedures
a) Application icon to review applicant’s application
b) Resume icon to review applicant’s resume
c) Interest icon to rate interest in the applicant
d) Mark Reviewed icon to denote the applicant has been reviewed
e) Route icon – option not functional for hiring managers
f) Interview icon to schedule an interview for the applicant
g) Reject icon to end the recruitment process for the applicant
h) Print icon to generate a printable PDF report of applicant information
i) Other Actions sub-menu to execute downstream processing functions such as submitting a background check or to prepare the applicant for hire

Illustrations

FIGURE 31 TAM 102 RECRUITING FUNCTIONS

5 - JOB OPENING FILTERS

Overview
The manage job opening filters automatically tracks the applicant pool based on where they are in the recruitment process.

Navigation Action Procedures
PeopleSoft Menu>Recruiting>Browse Job Openings
Click the blue Posting Title link

Procedures
a) All to see the total applicant pool
b) Applied to see applicants who completed the application process
c) Reviewed to see applicants who have been marked reviewed
d) Screen to see applicants who have been screened
e) Route to see applicants who have been route to others for response
f) Interview to see applicants who are in the interview stage of the process
g) Offer to see applicants who are in the job offer stage of the process
h) Hire to see applicants who were hired for this job opening

Notes
Job Aid ID 4.4
i) Hold to see applicants who on hold in the process (usually used to hold second choice candidate pending offer of 1st choice)

j) Reject to see applicants who have been rejected thus ending their candidacy

k) UC Work Experience to see applicants who indicated they have UC prior work experience

Illustrations

FIGURE 32 TAM 102 PROCESS FILTERS

Below are the visible statuses seen by the applicant in the Candidate Gateway through the process.

FIGURE 33 TAM 102 CANDIDATE GATEWAY APPLICANT VISIBLE STATUS

The applicant, Darrell, can see the Status field in the Candidate Gateway under the My Activities link.

FIGURE 34 TAM 102 CANDIDATE GATEWAY | MY ACTIVITIES
Notes: The filtered tabs automatically populate based on the Disposition status value.

Job Aid ID: 4.5

6 - APPLICATION & RESUME REVIEW

Overview: Hiring managers will be able to review applicant information clicking the appropriate icon.

Navigation Action Procedures:
- PeopleSoft Menu > Recruiting > Browse Job Openings
- Click the blue Posting Title link
  - a) Click Application icon to review the applicant’s application
  - b) Click Resume icon to review the applicant’s resume

Illustrations:

FIGURE 35: TAM 102 HM WORKBENCH | APPLICATION AND RESUME REVIEW ICONS

This is the page that appears when you click the Application icon.
As noted Figure 36, you can view additional attachments (resume/cover letter) in the attachment section of the application.

**7 - PRINTING APPLICANT INFORMATION**

**Overview**
Hiring manager may print applicant’s application information. Printing applicant information allows hiring managers to see what content are available and select desired information. Below is just a sample of what is available.

**Navigation Action Procedures**
PeopleSoft Menu > Recruiting > Browse Job Openings
Click the blue **Posting Title** link

a) Click the **Print** icon

b) Select the application report options to print on the report

c) Click the yellow **Generate Report** button in the bottom left corner of the page
FIGURE 37 TAM 102 PRINT ICON

<table>
<thead>
<tr>
<th>Type</th>
<th>Disposition</th>
<th>Disposition Reason</th>
<th>Application Date</th>
<th>SPC</th>
<th>Application</th>
<th>Resume</th>
<th>Internet</th>
<th>Work Reviewed</th>
<th>Route</th>
<th>Interview</th>
<th>Reject</th>
<th>Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>External</td>
<td>Applied</td>
<td></td>
<td>01/28/2020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FIGURE 38 TAM 102 PRINT APPLICATION REPORT OPTIONS

**Application Report Options**

- **Applicant Name**: Darrell Applicant Littleberry
- **Applicant ID**: 70389
- **Disposition**: 010 Applied
- **Job Posting Title**: BLANK AS1 1
- **Job Opening ID**: 2674

<table>
<thead>
<tr>
<th>Application Detail</th>
<th>Content Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferences</td>
<td>✓</td>
</tr>
<tr>
<td>Referral Sources</td>
<td>✓</td>
</tr>
<tr>
<td>Work Experience</td>
<td>✓</td>
</tr>
<tr>
<td>Education Level</td>
<td>✓</td>
</tr>
<tr>
<td>Training</td>
<td></td>
</tr>
<tr>
<td>Degrees</td>
<td>✓</td>
</tr>
<tr>
<td>Honors and Awards</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Questionnaire Type</th>
<th>Content Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Screening</td>
<td></td>
</tr>
<tr>
<td>Basic Eligibility</td>
<td></td>
</tr>
<tr>
<td>Minimum Qualifications</td>
<td></td>
</tr>
<tr>
<td>Quality Ranking</td>
<td></td>
</tr>
<tr>
<td>Preliminary</td>
<td></td>
</tr>
<tr>
<td>Final</td>
<td></td>
</tr>
<tr>
<td>Pre Screening</td>
<td></td>
</tr>
</tbody>
</table>

FIGURE 39 TAM 102 PRINT APPLICATION | GENERATE REPORT BUTTON

- Exclude sections with no content available
- Save My Selections

Generate Report

Return to Previous Page
PRINT MULTI-APPLICANT PACKAGE

You can create an information package for multiple selected applicants that will be emailed to you using the following steps.

a) Click on the checkboxes for the desired applicants  
b) Click the Group Actions link  
c) Select ‘View Applications’  
d) Click the yellow OK button

FIGURE 40 TAM 102 HM WORKBENCH | VIEW APPLICATIONS

Manage Job Opening

Mark Reviewed  
Manage Interviews  
Create Interview Evaluation  
Reject Applicant  
Print Application  
View Applications
Below is the message after selecting the ‘View Applications’ option.

**FIGURE 41 TAM 102 VIEW APPLICATIONS | CONSOLIDATED REPORT MESSAGE**

Below is the consolidated application package email with the attached PDF report of the applicant’s information (includes the job posting and each applicant’s application, resume and cover letter as provided).

**FIGURE 42 TAM 102 CONSOLIDATED APPLICATION REPORT EMAIL**

---

**8 - DISPOSITIONING APPLICANTS**

**Overview**

Hiring Managers will disposition or move applicants through the recruitment by changing their process status.  
PeopleSoft Menu > Recruiting > Browse Job Openings  
Click the blue **Posting Title** link  
From there, hiring managers can disposition applicants by clicking the appropriate icon to:

- **Rate Interest** to denote your enthusiasm level in the applicant
- **Mark Reviewed** so you know that you’ve reviewed the applicant
c) Route applicants
   a. Note: Hiring managers will not be able to Route applicants
   d) Schedule Interview to enter interview details
   e) Reject them to end their application process

Illustrations
This represents where the applicant is in the recruitment process.

This presentation of disposition icons is available when viewing the application by clicking the Application icon.

These icons are available to the right in the screenshot above.

Notes
Job Aid ID 4.8

9 - OTHER ACTIONS FOR APPLICANTS

Overview
Post candidate selection, hiring managers will be able to perform additional functions.

Navigation
PeopleSoft Menu > Recruiting > Browse Job Openings

Action
Click the blue Posting Title link
Procedures

a) Click the Other Actions sub-menu

### Recruiting Actions

<table>
<thead>
<tr>
<th>Step</th>
<th>Key Inputs</th>
<th>Input Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create Interview Evaluation</td>
<td>Allows the entry of an interview evaluation</td>
</tr>
<tr>
<td>2</td>
<td>Prepare Job Offer</td>
<td>This will not be available for hiring managers</td>
</tr>
<tr>
<td>3</td>
<td>Withdraw Application</td>
<td>This will not be available for hiring managers</td>
</tr>
<tr>
<td>4</td>
<td>Edit Application Details</td>
<td>This will not be available for hiring managers</td>
</tr>
<tr>
<td>5</td>
<td>Edit Disposition</td>
<td>Allows the Disposition status to be changed</td>
</tr>
</tbody>
</table>

### Applicant Actions

<table>
<thead>
<tr>
<th>Step</th>
<th>Key Inputs</th>
<th>Input Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Add Applicant to List</td>
<td>This will not be available for hiring managers</td>
</tr>
<tr>
<td>2</td>
<td>Change Applicant Status</td>
<td>This will not be available for hiring managers</td>
</tr>
<tr>
<td>3</td>
<td>Forward Applicant</td>
<td>This will not be available for hiring managers</td>
</tr>
<tr>
<td>4</td>
<td>Link Applicant to Job</td>
<td>This will not be available for hiring managers</td>
</tr>
<tr>
<td>5</td>
<td>Manage Applicant Checklists</td>
<td>This will not be available for hiring managers</td>
</tr>
<tr>
<td>6</td>
<td>Pre-Employment Check</td>
<td>Submit background check</td>
</tr>
<tr>
<td>7</td>
<td>Send Employment Check</td>
<td>Send email to applicant</td>
</tr>
</tbody>
</table>

Illustrations

**FIGURE 45 TAM 102 HM WORKBENCH | OTHER ACTIONS**

**FIGURE 46 TAM 102 OTHER ACTIONS - RECRUITING ACTIONS**

**FIGURE 47 TAM 102 OTHER ACTIONS - APPLICANT ACTIONS**

**Notes**

Some menu actions shown may not be available to hiring managers by design.

**Job Aid ID**

4.9
10 - GROUP ACTIONS FOR APPLICANTS

Overview
Hiring managers will be able to take some actions for a group of selected applicants to streamline management and save time.

Navigation
PeopleSoft Menu>Recruiting>Browse Job Openings

Action
Click the blue Posting Title link

Procedures
See integrated procedures in Illustration section.

Illustrations
Some recruiting and applicant actions can be executed for a group of selected applicants.

a) Select checkboxes for desired applicants
b) Click the Group Actions link
c) Select ‘Recruiting Actions’
d) Select the desired menu action

FIGURE 48 TAM 102 HM WORKBENCH | GROUP RECRUITING ACTIONS

MARK REVIEWED
Below is the page that appears after selecting the ‘Mark Reviewed’ option for selected applicants.

FIGURE 49 TAM 102 GROUP RECRUITING ACTIONS | MARK REVIEWED MESSAGE
MANAGE INTERVIEWS

Below is the page that appears after selecting the ‘Interview Schedule’ option for both selected applicants.

CREATE INTERVIEW EVALUATIONS

Below is the page that appears after selecting the ‘Create Interview Evaluation’ option for the selected applicants.

- Click the **Next** icon to view the next applicant

FIGURE 50 TAM 102 GROUP RECRUITING ACTIONS | MANAGE INTERVIEWS PAGE

FIGURE 51 TAM 102 GROUP RECRUITING ACTION | CREATE INTERVIEW EVALUATION
Below is the Interview Evaluation for the next applicant.

**FIGURE 52 TAM 102 GROUP RECRUITING ACTIONS | CREATE INTERVIEW EVALUATION NEXT BUTTON**

**FIGURE 53 TAM 102 GROUP RECRUITING ACTIONS | REJECT APPLICANT**

Below is the Reject Applicants option for both selected applicants.

a) **Reject** – This rejects the applicant with no notification

b) **Reject and Correspond** – This rejects the applicant and allows the Hiring Manager to create and send an email notification.

c) **Cancel** – This abandons the reject action.
### Applicant to Reject

<table>
<thead>
<tr>
<th>Applicant ID</th>
<th>Name</th>
<th>Job Opening</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>144171</td>
<td>Audrey Ruston</td>
<td>4440 - BLANK AST 1</td>
<td>![Delete Icon]</td>
</tr>
<tr>
<td>144174</td>
<td>Beyoncé Knowles</td>
<td>4440 - BLANK AST 1</td>
<td>![Delete Icon]</td>
</tr>
</tbody>
</table>

### Disposition

<table>
<thead>
<tr>
<th>Disposition</th>
<th>110 Reject</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Reject Icon]</td>
<td>![Reject and Respond Icon]</td>
<td>![Cancel Icon]</td>
</tr>
</tbody>
</table>
This is the Send Correspondence page once the Reject and Correspond button is clicked.

**FIGURE 54 TAM 102 GROUP ACTIONS | REJECT & CORRESPOND - SEND CORRESPONDENCE PAGE**

![Send Correspondence Page](image)

Although multiple applicants are listed, each will receive a separate instance of the authored email.

**Note:** Hiring Managers will now have the capability to send out rejection email correspondence to candidates not selected for the vacancy. To ensure a consistent message to candidates who are not selected, please see sample rejection correspondence language below:
o **Candidates Not Interviewed** *(sample language)*
   o Thank you for applying for the *position title* in the *department name*. All the applications received have been reviewed and evaluated. We reviewed your credentials thoroughly and have come to the difficult decision that your candidacy is no longer under consideration. Determining a small group of finalists was a difficult and lengthy process. Those who have emerged are considered to have the skills, knowledge and experience that more closely meet the needs of *position title*. Again, thank you for your interest in employment at the University of California, Santa Barbara. I hope there may be other employment opportunities of interest to you in the future. Sincerely, UCSB Human Resources-Employment Unit

o **Candidates Interviewed but Not Selected** *(sample language)*
   o Thank you for applying for the position of *position title* in the *department name*. Although your application and interview were impressive, another candidate was selected for the position. Our decision was based upon a careful comparison of the demands of the position with the abilities shown by each candidate. We appreciate your interest in the position and the time expended in reviewing your candidacy with us. Again, thank you for your interest in employment at the University of California, Santa Barbara. I hope there may be other employment opportunities of interest to you in the future. Sincerely, UCSB Human Resources-Employment Unit
Below is the Print Applicants option for selected applicants.

a) Click the yellow Run button

**FIGURE 55** TAM 102 GROUP RECRUITING ACTIONS | PRINT APPLICATIONS PAGE

<table>
<thead>
<tr>
<th>Application Detail</th>
<th>Select</th>
<th>Application Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferences</td>
<td></td>
<td>Referral Sources</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Work Experience</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Education Level</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Degrees</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Honors and Awards</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Licenses and Certifications</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Language Skills</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UC Specialty Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UC Corporate Credit Card</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Multi-Location Appointments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Student Opt In</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Non-Student Opt-Out</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Recruiter SPC Category</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UC Student Status</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UC I-9 Information</td>
</tr>
<tr>
<td></td>
<td></td>
<td>References</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Resume Text</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Questionnaire Type</th>
<th>Select</th>
<th>Questionnaire Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Work Eligibility</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Minimum Ranking</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Quality Ranking</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Attachment Type</th>
<th>Select</th>
<th>Attachment Type</th>
<th>Print Latest Document</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Resume</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>References</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Transcripts</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cover Letters</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Personal References</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Professional References</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>CIF</td>
<td></td>
</tr>
</tbody>
</table>

Select All | Deselect All

Exclude sections with no content available
Generate one PDF report per application

Return to Previous Page
After clicking the Run button, below is the Process Scheduler Request page that appears.

b) Click the Report Monitor link
This is the page that appears after clicking the Report Monitor link.

c) Click the yellow OK button.

FIGURE 57 TAM 102 PRINT APPLICATIONS | PROCESS SCHEDULER REQUEST

After clicking the yellow OK button, the page below appears.

d) Click the Details link
After clicking the **Details** link, the page below appears.

e) Click the PDF file link

![Report Detail](image)

**Report Detail**

**Report**

- **Report ID**: 707370
- **Process Instance**: 1843568
- **Name**: HRS_BTCH_APL
- **Process Type**: Application Engine
- **Run Status**: Success

**Application Details**

**Distribution Details**

- **Distribution Node**: OOD_REPNODE
- **Expiration Date**: 07/15/2020

**File List**

<table>
<thead>
<tr>
<th>Name</th>
<th>File Size (bytes)</th>
<th>Datetime Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>AE_HRS_BTCH_APL_1643568.stdout</td>
<td>561</td>
<td>04/16/2020 4:20:00.657027PM PDT</td>
</tr>
<tr>
<td>AE_HRS_BTCH_APL_1643568.trc</td>
<td>58,565</td>
<td>04/16/2020 4:20:00.657027PM PDT</td>
</tr>
<tr>
<td>Applications_Report_04-16-2020_1843568.pdf</td>
<td>599,970</td>
<td>04/16/2020 4:20:00.657027PM PDT</td>
</tr>
<tr>
<td>HRS_BIP_APPLICATION_144196_4443.xml</td>
<td>26,675</td>
<td>04/16/2020 4:20:00.657027PM PDT</td>
</tr>
<tr>
<td>HRS_BIP_APPLICATION_144170_4443.xml</td>
<td>28,713</td>
<td>04/16/2020 4:20:00.657027PM PDT</td>
</tr>
<tr>
<td>HRS_BIP_APPLICATION_144171_4443.xml</td>
<td>37,124</td>
<td>04/16/2020 4:20:00.657027PM PDT</td>
</tr>
<tr>
<td>HRS_BIP_APPLICATION_144176_4443.xml</td>
<td>26,131</td>
<td>04/16/2020 4:20:00.657027PM PDT</td>
</tr>
<tr>
<td>UC_E852_Errors.log</td>
<td>472</td>
<td>04/16/2020 4:20:00.657027PM PDT</td>
</tr>
</tbody>
</table>

**Distribute To**

- **Distribution ID**: 10070202
Below is the resulting PDF file. It will show each applicant’s application, resume and cover letter as provided.

FIGURE 60 TAM 102 PRINT APPLICATIONS | JOB OPENING PDF FILE
SEND CORRESPONDENCE

The 'Sending Correspondence' applicant action allows hiring managers to author and send an email directly from TAM.

a) Click the Group Actions link
b) Select Applicant Actions sub-menu
c) Select ‘Send Correspondence’

d) Complete the desired fields
e) Click the yellow Preview button to review the message – edit as desired
f) Click the yellow Send button to send the email correspondence
Although multiple applicants are listed, each will receive a separate instance.
**STEP 5 - SCHEDULING INTERVIEWS**

Hiring managers may schedule interviews in TAM.

**Process Parameters**
Let’s review the process parameters.

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Process Impact</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant(s)</td>
<td>Hiring managers will be able to view applicant and select the Interview icon</td>
<td>Opens component to setup interview scheduling details including interviewers and related email notifications</td>
</tr>
</tbody>
</table>

Scheduling an interview is more of a practical record based on a prior agreement with the applicant. The component shows the details that could be suggested or solidified. Additional features are available to make TAM the system of record for the interview.

---

### 1 - ENTERING INTERVIEW DETAILS

**Overview**
Hiring managers can store schedule details in the Interview Schedule page by entering/selecting.

**Navigation**
PeopleSoft Menu>Recruiting>Browse Job Openings

**Action**
Click the blue Posting Title link, then the Interview icon

**Procedures**

- **Enter**
  1. *Date of the interview*
  2. *Start Time* of the interview
  3. *End Time* of the interview
  4. **Interview Status** to denote the confirmation standing of the interview
  5. **Interview Type** to identify the modality of the interview
  6. **Applicant Response** to denote the confirmation status from the applicant
  7. **Venue** to select a list of pre-populated of high level UCSB interview locations
  8. **Location** to denote a more specific site where the interview will take place
  9. **Notify Applicant** checkbox – to send an email notification to applicant with interview details
     - Hiring managers can choose to notify the applicant via email with these details.
  10. **Notify Interview Team** checkbox - to send an email notification of interview details to interviewers listed in the Interviewers section of Interview Schedule page
     - Hiring managers can choose to notify interviewers listed in this schedule page via email with these details.

**Illustrations**
To create a new interview schedule for a subsequent interview, click the Interview icon, then click the yellow Create New Interview Schedule button in the lower left corner of the Interview Summary page.
2 - ADDING INTERVIEWERS (OPTIONAL)

Overview
Hiring managers may optionally add interviewers in the Interview Schedule page.

Navigation
PeopleSoft Menu>Recruiting>Browse Job Openings

Action
Click the blue Posting Title link, then the Interview icon

Procedures
a) Click the yellow Add Interview button
b) Enter the employee’s name in the Interviewer Name field

Illustrations

Notes
Adding interviewers is an optional step. When interviewers are in the Interview Schedule page, TAM will automatically allow these employees to complete an interview evaluation via Self-Service.

If you do not want interview evaluations to be completed in TAM by interviewers, ensure they are not listed as Interviewers in the Interview Schedule page.

Job Aid ID
5.2
3 - ENTERING INTERVIEW MATERIALS (OPTIONAL)

Overview
Hiring managers may optionally add Interview Materials when scheduling the interview such notes and attachments.

Navigation
PeopleSoft Menu>Recruiting>Browse Job Openings

Action
Click the blue Posting Title link, then the Interview icon

Procedures
a) Scroll down to the Interview Materials section in the bottom left area of the Schedule Interview page

Illustrations

FIGURE 65 TAM 102 INTERVIEW SCHEDULE | INTERVIEW MATERIALS

Notes
Job Aid ID 5.3
4 - ENTERING INTERVIEW NOTES (OPTIONAL)

Overview
Hiring managers may optionally want to add interview notes.

Navigation
PeopleSoft Menu>Recruiting>Browse Job Openings

Action
Click the blue Posting Title link, then the Interview icon

Procedures
See integrated procedures in Illustration section.

Illustrations

a) Scroll down to the Interview Materials section in the bottom left area of the Schedule Interview page

b) Click the Add Note button

c) Enter note fields
**Notes**

Attachments can be added to notes by clicking the yellow **Add Attachment** button. **Notes** already associated to the job opening can also be brought into the interview materials by clicking the yellow **Load Job Opening Notes** button.

**Job Aid ID** 5.4

---

### 5 - ADDING INTERVIEW ATTACHMENTS (OPTIONAL)

**Overview**

Hiring managers may optionally want to add attachments to the scheduled interview.

**Navigation**

PeopleSoft Menu > Recruiting > Browse Job Openings

**Action**

Click the blue **Posting Title** link, then the Interview icon

**Procedures**

See integrated procedures in Illustration section.

**Illustrations**

1. Scroll down to the **Interview Materials** section in the bottom left area of the **Schedule Interview** page
2. Click the **Add Attachment** button
3. Choose file to attach and click the yellow **Upload** button

**FIGURE 68 TAM 102 INTERVIEW SCHEDULE | INTERVIEW MATERIALS - ATTACHMENTS**

---

Below is the page that appears after clicking the yellow **Add Attachment** button.

**FIGURE 69 TAM 102 INTERVIEW MATERIALS – FILE ATTACHMENT DIALOG**

**Notes**

Attachments can be added to notes by clicking the yellow **Add Attachment** button. **Notes** already associated to the job opening can also be brought into the interview materials by clicking the yellow **Load Job Opening Notes** button.

**Job Aid ID** 5.5
6 - CUSTOMIZING APPLICANT/INTERVIEWER NOTIFICATIONS (OPTIONAL)

Overview
The email notification to the applicant and/or interviewers can be respectively customized.

Navigation
PeopleSoft Menu>Recruiting> Browse Job Openings

Action
Click the blue Posting Title link, then the Interview icon

Procedures
See integrated procedures in Illustration section.

Illustrations

a) Scroll down to the Interview Materials section in the bottom left area of the Schedule Interview page

b) Click the Save as Draft button at the bottom left of the page enabling the buttons in the Preview/Edit Meeting Request section in the lower left area of the page

Below shows the enabled meeting request buttons after clicking the button in step b.

c) Click the desired yellow meeting request button to modify

Below is the Interview Request email that will show when you click the meeting request buttons in step c above.

d) Make desired changes to email contents
e) Click the yellow Save button

This is the message after the Save button is clicked.

Notes
Hiring managers are able to completely customize the email notification to the applicant and/or interviewers including adding attachments.

Job Aid ID
5.6
7 - GENERATING AND UPLOADING AN INTERVIEW LETTER (OPTIONAL)

Overview
Optionally, hiring managers may want to generate an interview letter or email the applicant from TAM.

Navigation
PeopleSoft Menu > Recruiting > Browse Job Openings

Action
Click the blue Posting Title link, then the Interview icon

Procedures
- a) Scroll down to the Interview Materials section in the bottom right area of the Schedule Interview page select Letter template
- b) Click the yellow Generate Letter button
- c) View the generated RTF (rich text format) letter template and modify as desired
- d) Save resulting letter as a PDF (protected document format) file
  
  - Not shown in illustration
- e) Click the yellow Upload Letter button
- f) Select the exported PDF document
- g) Click the yellow Email Applicant button
- h) Verify the Interview Letter is attached to the email
- i) Complete email details
- j) Click the appropriate button to preview, send or cancel the email with attached letter

Illustrations

FIGURE 74 TAM 102 INTERVIEW SCHEDULE | INTERVIEW MATERIALS - LETTER

Below is the generated letter as a rich text format (.rtf) file. This is a template letter that can be modified as desired.
21 January 2020

Darrell Applicant Littleberry
1234 Cowboy Ln.
Dallas, TX 75001

Dear Littleberry,

An interview has been scheduled for you on the following date(s):

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Interviewer(s)</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>27 January 2020</td>
<td>09:00 AM PST</td>
<td>Darrell Consultant Littleberry</td>
<td>3rd floor of Student Affair &amp; Administrative Services Building (SAASB 3101) UC Santa Barbara Santa Barbara, CA 93106-3160</td>
</tr>
</tbody>
</table>

If you are unable to keep these appointments or if you have any questions, please contact me at (925)555-1234.

Thank you for taking time to interview with us. Careful consideration will be given to your experience and skills with regard to the position.

Thank you for considering our company as a prospective employer. We wish you success in your job search.

Sincerely,

Barbara Smith
Employment Coordinator
The modified letter should be exported as PDF (protected document format) file.
Select PDF interview letter document to upload.

FIGURE 77 TAM 102 INTERVIEW MATERIALS | LETTER – UPLOAD PDF INTERVIEW LETTER

FIGURE 78 TAM 102 INTERVIEW MATERIALS | LETTER – EMAIL APPLICANT
The upload letter is attached to the email correspondence. The letter can be deleted by click the trash can icon next to the letter in the Attachments section at the bottom of the page.
SCHEDULING INTERVIEW PROCESS NOTIFICATIONS

Applicants receive two email notifications when the Notify Applicant checkbox is checked on and submitted.

<table>
<thead>
<tr>
<th>Item</th>
<th>Email Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The first is the interview invitation email.</td>
</tr>
<tr>
<td>2</td>
<td>The second email is the calendar invite email.</td>
</tr>
</tbody>
</table>

The same messages above are sent to interviewers listed in the Interview Schedule page.

NEXT PROCESS STEP

Enter the interview evaluation.
**STEP 5B – ENTERING INTERVIEW EVALUATIONS**

As a process requirement, hiring managers must enter at least one interview evaluation in TAM for interviewed applicants.

**Process Parameters**

Let’s review the process parameters.

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Process Impact</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interviewed applicant(s)</td>
<td>Hiring managers will be able to enter an interview evaluation for the applicant(s). Multiple evaluations can be entered for each interview conducted for applicant(s).</td>
<td>Opens component to enter interview overall evaluation and status disposition.</td>
</tr>
</tbody>
</table>

Entering an interview evaluation is pretty straight-forward.

---

**1 – CREATING INTERVIEW EVALUATION**

<table>
<thead>
<tr>
<th>Overview</th>
<th>Hiring managers will need to enter an interview evaluation for applicants interviewed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>PeopleSoft Menu&gt;Recruiting&gt;Browse Job Openings</td>
</tr>
<tr>
<td>Action</td>
<td>Click the blue <strong>Posting Title</strong> link</td>
</tr>
<tr>
<td>Procedures</td>
<td>See integrated procedures in Illustration section.</td>
</tr>
</tbody>
</table>

From the **Manage Job Opening** component,

a) Click the **Other Actions** sub-menu and select ‘Create Interview Evaluation’

**FIGURE B1 TAM 102 CREATE INTERVIEW EVALUATION – MENU ITEM**

This is the page after selecting the ‘Create Interview Evaluation’ menu option.

To enter the evaluation:

b) Enter the information in the **Evaluation** section

c) Enter information in the **Interview Ratings** section

d) Enter a **Recommendation** disposition and **Comment** in the **Recommendation** section

e) Click the yellow **Submit** button when finished or the **Save as Draft** to save data entry prior to submitting the evaluation
FIGURE 82 TAM 102 INTERVIEW EVALUATION PAGE

Notes

Job Aid ID 5B.1
Overview
Hiring managers may need to enter an additional interview evaluation for applicants with multiple interviews.

Navigation
PeopleSoft Menu > Recruiting > Browse Job Openings

Action
Click the blue Posting Title link

Procedures
See integrated procedures in Illustration section.

Illustrations
From the Manage Job Opening component,

a) Click the Interview icon

FIGURE83 TAM 102 HM WORKBENCH INTERVIEW ICON

This is the page after selecting the ‘Create Interview Evaluation’ menu option.

b) Click the yellow Create New Evaluation button in the lower left corner

FIGURE84 TAM 102 INTERVIEW SUMMARY PAGE – CREATE NEW EVALUATION

Notes
Alternatively, you can start an interview evaluation by clicking the Interview icon from the Manage Job Opening component, click the yellow Create New Evaluation button (b) in the lower left corner of the Interview Summary page
By clicking the Interview icon, you can enter a new interview evaluation or edit an existing interview evaluation by clicking the blue Edit Evaluation link in the Interview Evaluations section.

**Job Aid ID** 5B.2

---

3 – ENTERING FINAL RECOMMENDATION

**Overview**

After completing the final interview evaluation, hiring managers will need to make a final recommendation.

**Navigation**

PeopleSoft Menu>Recruiting>Browse Job Openings

**Action**

Click the blue Posting Title link

**Procedures**

See integrated procedures in Illustration section.

**Illustrations**

a) Click the Interview icon

b) Selecting ‘020 Make Offer’ in the Final Recommendation field in the Final Recommendation section of the Manage Interviews page

c) Click the yellow Submit button (not shown in illustration below)

---

FIGUREB5 TAM 102 MANAGE INTERVIEWS – FINAL RECOMMENDATION

- The Reason field is not required.
- **Job Aid ID** 5B.3
4 – SELECTING A CANDIDATE

Overview
The hiring manager will need to change the applicant’s Disposition status to ‘Offer’ to select them as the candidate. Next, the hiring manager will need to notify their central HR recruiter (email) to make the job offer to the selected candidate.

Navigation Action
PeopleSoft Menu>Recruiting>Browse Job Openings
Click the blue Posting Title link

Procedures
See integrated procedures in Illustration section.

Illustrations
From the Manage Job Opening component on the desired applicant row,

a) Click the Other Actions submenu and select ‘Edit Disposition’

FIGURE 86 TAM 102 HM WORKBENCH | EDIT DISPOSITION – MENU ITEM

Create Interview Evaluation
Prepare Job Offer
Withdraw Application
Edit Application Details

Recruiting Actions
Applicant Actions

Edit Disposition

b) Select the ‘070 Offer’ in the *New Disposition field list
c) Select an appropriate Status Reason
d) Click the yellow Save button

FIGURE 87 TAM 102 HM WORKBENCH | EDIT DISPOSITION ‘OFFER’

Current Disposition 071 Offer Accepted
*New Disposition 070 Offer
Status Reason Candidate Selected
Date 01/24/2020

Save Cancel

Notes
Job Aid ID 5B.4
5 – ENTERING JOB OFFER PROPOSAL

Overview
The hiring manager will need to enter the job offer proposal for HR as a Note in the job opening.

Navigation
PeopleSoft Menu > Recruiting > Browse Job Openings

Action
Click the blue Posting Title link

Procedures
See integrated procedures in Illustration section.

Illustrations

a) Click the Add Note icon

b) Enter the *Subject as ‘Job Offer Proposal’

c) Select ‘Private’ for *Audience field

d) Enter the job offer proposal Details

e) Click the yellow Add Note button
Review and edit, as needed, entered notes in the Activity and Attachment tab.

FIGURE 90 TAM 102 HM WORKBENCH | NOTES – JOB OFFER PROPOSAL

<table>
<thead>
<tr>
<th>Notes</th>
<th>Subject</th>
<th>Note Date</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Offer Proposal</td>
<td>4/5/2019</td>
<td>Darrel Littleberry</td>
<td></td>
</tr>
</tbody>
</table>

Note: The hiring manager will need to notify HR of their selected candidate and include their hiring proposal by adding a note to the job opening. HR will make the job offer to the candidate.

Note: Items to include in the “details” section of the hiring proposal note include:

1. Salary and justification
2. Start date
3. Any other relevant/additional details the recruiter might need to know
4. Recharge number for HR to submit the background check OR indicate that your department has a Universal account and will submit the background check

INTERVIEW EVALUATION PROCESS NOTIFICATIONS

No email notifications noted for this process.
NEXT PROCESS STEP

Hiring managers will continue to manage the applicant pool until a candidate is selected.

OTHER MANAGE JOB OPENING FUNCTIONS

Overview
There are other manage job opening functions that hiring managers may desire to use.

Navigation
PeopleSoft Menu>Recruiting>Browse Job Openings

Action
Click the blue Posting Title link

Procedures
See integrated procedures in Illustration section.

Illustrations

PRINT JOB OPENING

a) Click the Print Job Opening icon

FIGURE 91 TAM 102 HM WORKBENCH | PRINT JOB OPENING ICON
b) Click the yellow **Create Report** button

**FIGURE 92** TAM 102 HM WORKBENCH | PRINT JOB OPENING – CREATE REPORT

Select Job Opening Sections

- Job Opening
- BLANK AST 2 Needed!

Select Section to Print (PAGE Sections)

- JOB DETAILS Job Information
- JOB DETAILS Salary Information
- JOB DETAILS Staffing Information
- QUALIFICATIONS Education and Experience
- SCREENING Screening Options
- SCREENING Screening Question
- HIRING TEAM Hiring Manager Assignments
- HIRING TEAM Interested Party Assignments
- HIRING TEAM Interviewer Assignments
- HIRING TEAM Recruiter Assignments
- JOB POSTINGS Job Postings
- OTHER Notes
- OTHER Applicants
- OTHER Job History

Select All  Deselect All  Return to Previous Page

Create Report
Below is the job opening report.

<table>
<thead>
<tr>
<th>Job Opening ID</th>
<th>4599</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Posting Title</td>
<td>BLANK AST 2 Needed!</td>
</tr>
<tr>
<td>Job Code</td>
<td>004723(BLANK AST 2)</td>
</tr>
<tr>
<td>Position Number</td>
<td>40066442(BLANK AST 2)</td>
</tr>
<tr>
<td>Status</td>
<td>010 Open</td>
</tr>
<tr>
<td>Business Unit</td>
<td>SBCMP(UC Santa Barbara Campus)</td>
</tr>
<tr>
<td>Department</td>
<td>HLSF ENVIRONMENTAL HEALTH &amp; SAFETY</td>
</tr>
</tbody>
</table>

**Job Information**

- **Created By**: Darrell Littleberry
- **Created**: 03/24/2020
- **Opening to Fill**: Limited Number of Openings
- **Target Openings**: 1
- **Available Openings**: 1
- **Establishment ID**: SBCMP(UC Santa Barbara Campus)
- **Company**: UC(University of California)
- **Department**: HLSF ENVIRONMENTAL HEALTH & SAFETY
- **Status Code**: 010 (010 Open)
Hiring managers can clone an existing job opening to use as a starting point for a new job opening. Follow the steps below to clone an existing job opening.

a) Click the **Clone** feature

![FIGURE94 TAM 102 HM WORKBENCH | CLONE ICON](image_url)

b) Enter **New Posting Title**

c) Click the yellow **Clone** button

![FIGURE95 TAM 102 HM WORKBENCH | CLONE - NEW JOB OPENING DATA](image_url)
Below is the message page after clicking the yellow Clone button.

**FIGURE 96 TAM 102 HM WORKBENCH | CLONE – SUCCESSFULLY CLONE MESSAGE**

**PERSONALIZING JOB CATEGORIES**

Hiring managers can personalize categories to classify and group job openings by following the steps below.

a) Click the **Category** feature

**FIGURE 97 TAM 102 HM WORKBENCH | CATEGORY ICON**
b) Click on the **Personalize Job Categories** link

**FIGURE 98 TAM 102** HM WORKBENCH | CATEGORY – SELECT A CATEGORY

Select an icon below to assign a category to the job opening.

<table>
<thead>
<tr>
<th>Current</th>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hot Jobs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Green Category</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yellow Category</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Blue Category</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Orange Category</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Purple Category</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No Category</td>
<td></td>
</tr>
</tbody>
</table>

![Select a Category](image)

![Personalize Job Categories](image)


c) Enter your desired **Description** label(s)

d) Click the yellow **OK** button

**FIGURE 99 TAM 102** HM WORKBENCH | CATEGORY – ENTER DESCRIPTION

![Configure Job Category](image)

![Personalize Job Categories](image)
Now that you've personalized your job category, you can assign the personalized category to job openings by completing the following steps.

e) Click on the **Category** feature

**FIGURE 100 TAM 102. HM WORKBENCH | CATEGORY – ASSIGN CATEGORY**

f) Click on the desired job **Category**

**FIGURE 101 TAM 102. HM WORKBENCH | CATEGORY – SELECT PERSONAL CATEGORY**

Select an icon below to assign a category to the job opening.
Below is the selected job category applied to the job opening.

FIGURE 102 TAM 102 HM WORKBENCH | CATEGORY – PERSONAL CATEGORY SELECTED

Below is the selected job category applied to the job opening.

**PROCESS NOTIFICATIONS**

**Item** | **Email Notification** | **Screenshot**
--- | --- | ---
1 | The applicant is notified via email when they apply for a job opening. | test@ucopuest.edu

**FIGURE 103 TAM 102 SUCCESSFULLY SUBMITTED JOB OPENING EMAIL**

Your online application has been successfully submitted

Dear Darrell Applicant Littieberry,

Thank you for expressing an interest for the following position(s):

2874-SLH4-AST 1

We will carefully review your application to determine if you are a qualified candidate. If your application passes our initial evaluation, we will contact you.

To visit our careers site use the following link to sign in to your account:

https://careers.ucop.berkeley.edu/employer/HRMS|HRMS|HRMSPRINT_HRS_HRAPP_SCHLJOB?Page=HRMS_APP_SCHLJOB&Action=1&FOCUS=Applicant&SiteId=31

Thank you

This email was automatically generated. Please do not respond.
NEXT PROCESS STEP
Select candidate or continue recruitment effort.

COURSE 103 – HIRING IN TAM

STEP 9 - SUBMIT BACKGROUND CHECK (FROM TAM)
After the job offer has been made by HR and accepted by the candidate, a background check may be needed. If required, hiring managers with a Universal (background check vendor) account provisioned or the Human Resource Employment team (by request for all other hiring managers) will initiate this request in TAM.

1 - SUBMITTING A BACKGROUND CHECK REQUEST FROM TAM
Overview
For hiring manager will need to select the candidate from the applicant pool.

Navigation
PeopleSoft Menu>Recruiting>Browse Job Openings
Action
Click the blue Posting Title link

Procedures
From the Manage Job Opening component,
  a) Click Other Actions submenu

FIGURE 104 TAM 103 HM WORKBENCH | OTHER ACTIONS

UC Santa Barbara HR Employment
b) Click ‘Pre-Employment Check’

FIGURE 105 TAM 102 HM WORKBENCH | OTHER ACTIONS – PRE-EMPLOYMENT CHECK

Add Applicant to List
Change Applicant Status
Forward Applicant
Link Applicant to Job
Manage Applicant Checklists
Pre-Employment Check
Send Correspondence

Pre-Employment Check

Applicant
Name: Audrey Hepburn
Applicant ID: 144171
Applicant Type: External Applicant
Status: 019 Active

Preferred Contact
Email: melinda.crawford88@gmail.com
Phone: 805/993-5781
Address: Evergreen Cemetery, Hollywood, CA 90010

Background Screening Provider: UCSB STAGING 117151

Screening Inquiries
Provider: UCSB STAGING 117151
Request ID: No Response
Request Date: 03/11/2020
Status: Request Initiated
Adjudication Status: Not Displayed

NOTE
Job Aid ID 9.1
## 2 - COMPLETING THE BACKGROUND CHECK VIA THE UNIVERSAL PORTAL

<table>
<thead>
<tr>
<th>Overview</th>
<th>The hiring manager will need to complete the background check submission in the Universal portal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>PeopleSoft Menu &gt; Recruiting &gt; Browse Job Openings</td>
</tr>
<tr>
<td>Action</td>
<td>Click the blue <strong>Posting Title</strong> link</td>
</tr>
<tr>
<td>Procedures</td>
<td></td>
</tr>
<tr>
<td>Illustrations</td>
<td></td>
</tr>
</tbody>
</table>

Once the yellow **Request New Inquiry** button is clicked, the Universal portal will open in a new web browser window.

a) Log into the Universal portal

**FIGURE 107 TAM 103 UNIVERSAL PORTAL | SECURE LOGIN PAGE**

- Secure Login
  - Account: 117161
  - Username: ditteberry
  - Password: 
  - Remember Me?
  - Login

- Quest Diagnostics “Preferred” Third Party Collections
  - Certain third party drug test collection sites in the Quest Diagnostics network will incur a collection surcharge starting on January 1, 2020. These locations are labeled as “Preferred” on the Quest website and will also be noted when placing orders via the Universal portal, along with other Third-Party/Out of Network sites. Please note that third-party collection fees do not apply to collections performed at Quest Diagnostics patient service center locations.

- New Hampshire Statewide Notary
  - Effective immediately, the Special New Hampshire Statewide form no longer requires the notary. Universal is still required to collect the form with original signatures so please continue to mail/Tex/Ex your forms.

- Increase in Court Fee for Benton, TN
  - Effective immediately, the Benton, TN County Court has implemented a $5.00 court fee for all court searches.
b) Select the Background Check Package

FIGURE 108 TAM 103 UNIVERSAL PORTAL | NEW BACKGROUND CHECK PAGE

Note: The Position/Job and Billing ID #1/#2 will not pull over from TAM to Universal. Hiring managers will need to enter desired field values.
This is the lower half of the background check page.

c) Select if you want to be copied on the e-Form invitation to the candidate (in mid-lower left side of page)
d) Check on the Certification checkbox (scroll toward bottom of page)
e) Click the black Send Invitation button to send the invitation
f) Ensure you get the message that your invitation was successfully sent

FIGURE 109 TAM 103 UNIVERSAL PORTAL | E-FORMS INVITATION

Below is the Success message displayed after the black Send Invitation button is clicked.

FIGURE 110 TAM 103 UNIVERSAL PORTAL | SUCCESSFUL INVITATION MESSAGE
3 - REVIEWING BACKGROUND STATUS IN TAM

Overview
Once the background check has been submitted, hiring managers will want to monitor their requests in TAM.

Navigation
PeopleSoft Menu>Recruiting>Browse Job Openings

Action
Click the blue Posting Title link

Procedures
If you’ve just submitted the background check follow all steps below, otherwise, follow the navigation to the Browse Job Openings page and start at procedure d below.

Illustrations
a) Return to TAM by clicking the appropriate browser window

b) Click the Return to Previous Page link

c) If you get the Pre-employment Check page, you’ll need to click the Browse Job Openings navigation link

Please leave this window open.
d) Click on the blue link **Posting Title**

Click on the blue link **Posting Title** in the job posting and select the 'Pre-Employment Check' menu item.
g) View the **Status** in the **Screening Inquiries** grid.

When the **Status** is ‘Complete’, the background check is finished and Universal returns key applicant fields:

- legal name
- address
- date of birth
- social security number

are updated in TAM.

---

Notes

Except for the legal name, the applicant data fields returned to TAM from Universal will not be viewable by hiring managers.

Job Aid ID 9.3
STEP 10 – PREPARE FOR HIRE

Prepare for Hire is the component in TAM used to request hire of selected candidate.

1 - STARTING THE PREPARE FOR HIRE REQUEST

Overview
Once the candidate accepts the job offer from HR and any required background checks have been completed, the hiring manager will need to get the hiring process started.

Navigation
PeopleSoft Menu > Recruiting > Browse Job Openings

Action
Click the blue Posting Title link

Procedures
Illustrations

a) Click the blue Posting Title link

Browse Job Openings

<table>
<thead>
<tr>
<th>Posting Title</th>
<th>Category</th>
<th>Recruiting Location</th>
<th>Department</th>
<th>Business Unit</th>
<th>Status</th>
<th>No Action Taken</th>
<th>Total Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>BLANK AST 1</td>
<td></td>
<td>UNIVERSITY CENTER BOOKSTORE</td>
<td>UC Santa Barbara Campus</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>DIRECTOR</td>
<td></td>
<td>UCSC Campus</td>
<td>SPANISH &amp; PORTUGUESE</td>
<td>UC Santa Barbara Campus</td>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>FAC MGR 2</td>
<td></td>
<td>UCSC Campus</td>
<td>FACILITIES MANAGEMENT</td>
<td>UC Santa Barbara Campus</td>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>BLANK AST 1</td>
<td></td>
<td>UCSC Campus</td>
<td>ARTS AND LECTURER OFFICE</td>
<td>UC Santa Barbara Campus</td>
<td>9</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Analog and Digital Engineer</td>
<td></td>
<td>UCSC Campus</td>
<td>ELECTRICAL &amp; COMPUTER ENGINEER</td>
<td>UC Santa Barbara Campus</td>
<td>9</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>COOK</td>
<td></td>
<td>UCSC Campus</td>
<td>R &amp; D CARRILLO PD SVC</td>
<td>UC Santa Barbara Campus</td>
<td>14</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
b) Click the **Other Actions** submenu

c) Select ‘Prepare for Hire’

**FIGURE 111 TAM 103 HM WORKBENCH | OTHER ACTIONS – PREPARE FOR HIRE**

**FIGURE 112 TAM 103 PREPARE FOR HIRE COMPONENT**

---

**2 - COMPLETING PREPARE FOR HIRE DATA ENTRY**

d) Complete hire data entry
To initiate a hire, refine, transfer, additional job assignment, or to add a contingent worker assignment, select Submit Request to HR.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant ID</td>
<td>144171</td>
</tr>
<tr>
<td>Applicant Name</td>
<td>Audrey Ruston</td>
</tr>
<tr>
<td>Current Disposition</td>
<td>071 Offer Accepted</td>
</tr>
<tr>
<td>Disposition Date</td>
<td>03/13/22/20</td>
</tr>
<tr>
<td>Applicant Type</td>
<td>External - New</td>
</tr>
<tr>
<td>Application Date</td>
<td>03/04/2020</td>
</tr>
<tr>
<td>Job Opening ID</td>
<td>6443</td>
</tr>
<tr>
<td>Job Opening Type</td>
<td>Continuous Job Opening</td>
</tr>
<tr>
<td>Business Unit</td>
<td>UC Santa Barbara Campus</td>
</tr>
<tr>
<td>Department</td>
<td>R &amp; D CARRILLO FD SVC</td>
</tr>
<tr>
<td>Position Number</td>
<td>40088932</td>
</tr>
<tr>
<td>Job Code</td>
<td>COOK</td>
</tr>
<tr>
<td>Employee Class</td>
<td>Staff Cancer</td>
</tr>
<tr>
<td>SSN</td>
<td>300K-XX-5555</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>05/04/1929</td>
</tr>
<tr>
<td>Probation Code</td>
<td></td>
</tr>
<tr>
<td>Probation End Date</td>
<td>15</td>
</tr>
<tr>
<td>Total Employment End Date</td>
<td>15</td>
</tr>
<tr>
<td>ER1/Phased Retirement End D</td>
<td>15</td>
</tr>
<tr>
<td>Location Use End Date</td>
<td>15</td>
</tr>
<tr>
<td>Location Use End Date Desc</td>
<td></td>
</tr>
<tr>
<td>PY Career Duration</td>
<td>15</td>
</tr>
<tr>
<td>Oath Sign Date</td>
<td>15</td>
</tr>
<tr>
<td>Patent Acknowledgment Sign D</td>
<td>15</td>
</tr>
<tr>
<td>Modified Patent Acknow Sign D</td>
<td>15</td>
</tr>
<tr>
<td>Review Type</td>
<td>15</td>
</tr>
<tr>
<td>Next Review Date</td>
<td>15</td>
</tr>
<tr>
<td>Tracker Profile ID</td>
<td></td>
</tr>
<tr>
<td>*Start Date</td>
<td>03/30/2020</td>
</tr>
</tbody>
</table>

Employee ID: Verify Employee ID
External System: External System ID
Hire Comments

Attachments
No Attachments have been added to this Job Opening.
e) Complete **probation code section, probation end date and start date** these fields prompt ePerformance.

f) Click the **Verify Employee ID** link to launch search match

Below are the two initial **Types of Hire** or Actions to process a hire. Once search match is complete, the values in the list will reflect appropriate choices based on your search match actions.

FIGURE113 TAM 103 PREPARE FOR HIRE | VERIFY EMPLOYEE ID LINK
4 - REVIEWING PERSON ORG SUMMARY

**g) Click the Person Organizational Summary link on the Additional Information tab.**

The **Person Organizational Summary** component opens in a new web browser window.
5 - SELECTING TYPE OF HIRE AND ACTION REASON

h) Select the **Type of Hire** and **Action Reason**

6 - ENTERING COMPENSATION DATA

i) Click the **Earns Dist/Addl Pay** tab and enter compensation data
7 - ENTERING PREPARE FOR HIRE COMMENTS

j) Click the Prepare for Hire tab and enter Hire Comments

FIGURE 118 TAM 103 PREPARE FOR HIRE | HIRE COMMENTS
8 - GENERATING THE PREHIRE AUDIT REPORT

k) Optionally click the yellow Print Pre Hire Audit Report button

Below is the first page of the Pre Hire Data Audit report.

- Note: The Type of Hire and Action Reason fields are not included in the Pre Hire Data Audit report.
9 - SUBMIT HIRE REQUEST TO UCPC

1) Click the yellow **Submit Request to UCPC** button to submit hire request to UCPC

---

**FIGURE 121 TAM 103 PREPARE FOR HIRE | SUBMIT REQUEST TO UCPC**

<table>
<thead>
<tr>
<th>Employee ID Verified</th>
<th>Verify Employee ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>External System</th>
<th>External System ID</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Hire Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our due diligence has determined that Audrey is a new hire with no prior UC affiliation.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Attachments have been added to this Job Opening.</td>
</tr>
</tbody>
</table>

---

Submit Request To UCPC  Cancel  Print Pre Hire Audit Report
This message (with Transaction ID) below appears after clicking the yellow Submit Request to UCPC button.

FIGURE122 TAM 103 PREPARE FOR HIRE | SUBMIT REQUEST TO UCPC – TRANSACTION ID MESSAGE

You have successfully submitted this request. The Transaction ID is 1487. (0,0)

10 - FINAL DISPOSITION OF APPLICANT POOL

a) Click the Reject button for each respective applicant or check on the checkbox for desired applicants and click the Group Actions sub-menu and select ‘Reject Applicant’

FIGURE123 TAM 103 GROUP ACTIONS LINK | FINAL DISPOSITIN TO REJECT APPLICANTS

b) Select the Reason (optional: for reporting purposes)

c) Click the yellow Reject or Reject and Correspond button

i. Reject will simply change the Disposition to ‘Reject’

ii. Reject and Correspond will change the Disposition to ‘Reject’ and allow the hiring manager to send an email correspondence to the selected applicant(s).

FIGURE124 TAM 103 GROUP ACTIONS LINK | APPLICANT TO REJECT
The message to the below is received after clicking the yellow Reject button.

**FIGURE 125 TAM 103 GROUP ACTIONS LINK | REJECT APPLICANTS – SUCCESSFULLY REJECTED MESSAGE**

You have successfully rejected this Applicant. (18178.1100)

**OK**

Below, the selected applicants have been rejected.

**FIGURE 126 TAM 103 HM WORKBENCH | REJECTED APPLICANTS**

As well, if you’ve placed any runner up candidates ‘On Hold’, then you need to reject them to end their application process.
a) Navigate to the Transaction Status page
b) Enter ‘SBCMP’ in Business Unit
c) Select ‘RecruitingHire/Rehire/Transfer’ in Transaction Type
d) Enter dates in Start Date From and To date fields (corresponds to Effective hire or start date)
e) Click the yellow Refresh button
f) Click the View Comments link to view UCPC comments

FIGURE 127 TAM 103 TRANSACTION STATUS PAGE | PREPARE FOR HIRE REQUEST

Below is the page shown after clicking the blue View Comments link.

FIGURE 128 TAM 103 TRANSACTION STATUS | PREPARE FOR HIRE REQUEST – VIEW COMMENTS
12 - RESUBMITTING PREPARE FOR HIRE REQUEST

If the Prepare for Hire request is canceled by UCPC, the Prepare for Hire component will be greyed out and not editable. You will need to follow these steps to resubmit the request.

1) The hiring manager will need to set the Disposition back to 'Ready for Hire'.
2) Contact your HR recruiter who will need to withdraw the candidate from the hire process so you can restart the Prepare for Hire request.

Only after the candidate is withdrawn from the hire request by HR will the hiring manager be able to start the Prepare for Hire request.

The illustration below shows the re-entered Prepare for Hire request after completing the aforementioned steps.
<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant ID</td>
<td>14471</td>
</tr>
<tr>
<td>Applicant Name</td>
<td>Audrey Rusin</td>
</tr>
<tr>
<td>Current Disposition</td>
<td>Withdrawn</td>
</tr>
<tr>
<td>Disposition Date</td>
<td>04/03/2020</td>
</tr>
<tr>
<td>Applicant Type</td>
<td>External, New</td>
</tr>
<tr>
<td>Application Date</td>
<td>05/04/2020</td>
</tr>
<tr>
<td>Job Opening ID</td>
<td>4443</td>
</tr>
<tr>
<td>Job Opening Type</td>
<td>Continuous Job Opening</td>
</tr>
<tr>
<td>Business Unit</td>
<td>UC Santa Barbara Campus</td>
</tr>
<tr>
<td>Department</td>
<td>R &amp; DH CARRILLO ID SVC</td>
</tr>
<tr>
<td>Position Number</td>
<td>43000302</td>
</tr>
<tr>
<td>Job Code</td>
<td>COOK</td>
</tr>
<tr>
<td>Employee Class</td>
<td>Staff, Career</td>
</tr>
<tr>
<td>SSN</td>
<td>XXX-KK-7262</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>06/04/1922</td>
</tr>
<tr>
<td>Probation Code</td>
<td></td>
</tr>
<tr>
<td>Probation End Date</td>
<td></td>
</tr>
<tr>
<td>Trial Employment End Date</td>
<td></td>
</tr>
<tr>
<td>ERIT/Phased Retirement End Date</td>
<td></td>
</tr>
<tr>
<td>Location Use End Date</td>
<td></td>
</tr>
<tr>
<td>Location Use End Date Desc</td>
<td></td>
</tr>
<tr>
<td>PY Career Duration</td>
<td></td>
</tr>
<tr>
<td>Oath Sign Date</td>
<td></td>
</tr>
<tr>
<td>Patent Acknowledgement Sign Date</td>
<td></td>
</tr>
<tr>
<td>Modified Patent Acknowledge Sign Date</td>
<td></td>
</tr>
<tr>
<td>Review Type</td>
<td></td>
</tr>
<tr>
<td>Next Review Date</td>
<td></td>
</tr>
<tr>
<td>Tracker Profile ID</td>
<td></td>
</tr>
<tr>
<td>Type of Hire</td>
<td>Hire</td>
</tr>
<tr>
<td>Action Reason</td>
<td>Hire, No Prior UC Affiliation</td>
</tr>
<tr>
<td>Start Date</td>
<td>03/30/2020</td>
</tr>
<tr>
<td>Employee ID</td>
<td></td>
</tr>
<tr>
<td>Employee ID Verified</td>
<td>Yes</td>
</tr>
<tr>
<td>Verify Employee ID</td>
<td></td>
</tr>
<tr>
<td>External System</td>
<td></td>
</tr>
<tr>
<td>External System ID</td>
<td></td>
</tr>
<tr>
<td>Hire Comments</td>
<td>I'm resubmitting Audrey for true</td>
</tr>
<tr>
<td></td>
<td>processing as a new hire.</td>
</tr>
<tr>
<td>Attachments</td>
<td>No Attachments have been added to</td>
</tr>
<tr>
<td></td>
<td>this Job Opening.</td>
</tr>
</tbody>
</table>

**Employee Comments:**
I'm resubmitting Audrey for true processing as a new hire.
Enter the compensation information on the **Earns Dist/Addl Pay** tab.

---

### 13 - VETTING THE PREPARE FOR HIRE REQUEST

Monitoring the **Prepare for Hire** request.
After Audrey Ruston is hired, the Manage Job Opening component now shows that she is hired, and the status of the Job Opening is 'Filled/Closed'.

**FIGURE 129 TAM 103 HM WORKBENCH | HIRED DISPOSITIONED CANDIDATE**
The **Transaction Status** page now shows that Audrey Ruston has a **Transaction Status** of 'Hired/Added'.

**Transaction Status**

The following transactions are pending, canceled or have been processed by Human Resources.

<table>
<thead>
<tr>
<th>Select</th>
<th>Template</th>
<th>Effective Date</th>
<th>Transaction Status</th>
<th>Person ID</th>
<th>Empl Record</th>
<th>Action</th>
<th>Business Unit</th>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>RECRUITING</td>
<td>03/30/2020</td>
<td>Hired/Added</td>
<td>10421075</td>
<td>0</td>
<td>Hire</td>
<td>SBCMP</td>
<td>Audrey</td>
<td>Ruston</td>
</tr>
</tbody>
</table>

**Go To** Smart HR Transactions
Now, hiring managers will be able to verify job record information in the Job Data component. This is Audrey’s job record in the Job Data component.

**FIGURE 130 TAM 103 JOB DATA | VERIFY JOB RECORD DATA**

Notes

There are many job record elements to verify including FTE and compensation data.

Job Aid ID

10.1
**HIRE PROCESS NOTIFICATIONS**

<table>
<thead>
<tr>
<th>Item</th>
<th>Email Notification</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Background report notification</td>
<td><img src="#" alt="FIGURE131 TAM 103 BACKGROUND REPORT EMAIL" /></td>
</tr>
</tbody>
</table>

** FIGURE131 TAM 103 BACKGROUND REPORT EMAIL**

Background report for Audrey Ruston

newupdate_automail@universalbackground.com

Thu, Mar 12, 7:59 PM

The report for Audrey Ruston is ready for your review on our secure server. For security and privacy, you will be prompted to enter your account number, username and password.

https://portal.universalbackground.com/tmpt?r=186913888&c=117151

For questions about this order, please contact our Client Services Department toll free at 1-877-581-5103 or via email cs@universalbackground.com.

Thank you for choosing Universal Background Screening - we appreciate your business!

| 2    | Hire confirmation email to recruiter and hiring manager. | ![FIGURE132 TAM 103 CANDIDATE HIRED EMAIL](#)|

** FIGURE132 TAM 103 CANDIDATE HIRED EMAIL**

Applicant (144171) Audrey Ruston has had a status change to 090 Hired

priyanka.sharma@ucopetest.edu

to katherine.abad, darrell.littleberry

1:18 PM (1 hour ago)

This e-mail is to inform you that applicant (144171) Audrey Ruston has had a status change to 090 Hired for job opening (4443) COOK in recruitment area 3.

| 3    | HR error email sent only to hiring manager. There are instructions at the end of the email (not shown in screenshot) | ![FIGURE133 TAM 103 CANDIDATE HIRED ERRORS EMAIL](#)|

** FIGURE133 TAM 103 CANDIDATE HIRED ERRORS EMAIL**

Profile Data for Audrey Ruston pushed into HR with errors.

priyanka.sharma@ucopetest.edu
to darrell.littleberry

1:18 PM (1 hour ago)

The Profile Data for this applicant is processed. Please see below for errors that occurred during the process.

Applicant Name: Audrey Ruston
Former Worker: No
Employee ID: 10421075
Type of Hire: Hire

The errors are:

Profile:

Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11) -- The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink.

Error changing value. ([JPM_IPM_PERSON_PROFILE_SRV]JPM_IP_CAT_TYPE(5)JPM_IP_CRITM_WV(1).STATE) (91,34) -- An error occurred while changing the value of the field.

Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11) -- The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink.

Error changing value. ([JPM_IPM_PERSON_PROFILE_SRV]JPM_IP_CAT_TYPE(5)JPM_IP_CRITM_WV(1).STATE) (91,34) -- An error occurred while changing the value of the field.

Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11) -- The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink.
NEXT PROCESS STEP

Ensure the applicant pool for the job opening has been fully dispositioned and make sure the job opening status is ‘Filled/Closed’.

GLOSSARY

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Gateway (CG)</td>
<td>The web portal where applicants will be able to view and apply for jobs</td>
</tr>
<tr>
<td>Component</td>
<td>A collection of related UCPath pages usually arranged in tab format</td>
</tr>
<tr>
<td>Disposition</td>
<td>To give a status to an item</td>
</tr>
<tr>
<td>External applicant</td>
<td>Any non UCSB person who applies for a job through the external CG</td>
</tr>
<tr>
<td>External CG</td>
<td>The web portal for non-UCSB employees to apply for job via the world wide web.</td>
</tr>
<tr>
<td>Hiring team</td>
<td>The selected HR Recruiter(s), department Hiring Manager(s), Interviewer(s) and Interested Parties who are included for job opening access</td>
</tr>
<tr>
<td>HM</td>
<td>Department hiring manager</td>
</tr>
<tr>
<td>Interested parties</td>
<td>UCSB employees/contingent workers who are given employee access to the job opening to appropriately deemed purposes.</td>
</tr>
<tr>
<td>Internal applicant</td>
<td>Any UCSB employee/contingent worker who applies for a job through the internal CG</td>
</tr>
<tr>
<td>Internal CG</td>
<td>The web portal for UCSB employees to apply for jobs via UCPath self-service.</td>
</tr>
<tr>
<td>Interviewers</td>
<td>UCSB employees/contingent workers who are identified as potential resources to interview applicants</td>
</tr>
<tr>
<td>Job opening</td>
<td>TAM transaction containing campus and job posting information</td>
</tr>
<tr>
<td>Page</td>
<td>A single UCPath webpage or tab</td>
</tr>
<tr>
<td>UCPC</td>
<td>UCPath Center</td>
</tr>
<tr>
<td>Universal</td>
<td>Universal is the name of the third party background check vendor</td>
</tr>
</tbody>
</table>
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<th>Page</th>
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<td>JOB POSTINGS TAB - JOB POSTINGS SECTIONS</td>
</tr>
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<td>TAM 102 HM WORKBENCH</td>
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<td>APPLICATION AND RESUME REVIEW ICONS</td>
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