Taleo Talent Management System Training

STAFF HIRING MANUAL
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Navigation

Taleo is accessed from the TUPortal. To access select Taleo Talent Management System.

The Recruiting Center is the main dashboard screen with a series of Tabs, Channels, Filters and a Search Area to make it easy for you to quickly perform a wide range of essential recruiting tasks. To access the Recruiting Center you will need to select the Recruiting link at the top of the Welcome Center page.

You can click on the Recruiting link in the navigation pane on the left side of the page as well.

The Recruiting Center is set up to provide quick access to information on requisitions, candidates, offers and other activated functions. It is also possible to set up preferences and personal information in the My Setup area.

The Recruiting Center Stage page contains links to virtually all of your vital information and tasks. From candidates to requisitions, this page provides time-saving options that will guide you to where you need to be in the system.
It is simple to navigate through the **Recruiting Center**.

1. **Channels:** Navigate from Center Stage using sections called Channels, which display status-oriented data about your activities. From the links on the Channels, you can access information on your requisitions, candidates, job offers and other tasks. Each Channel contains a list of elements and the number of items associated with each element.
2. **Main Menu:** Access the main menu items to work with your requisitions, candidates, offers, and tasks quickly. Clicking the Channel title of the same name will get the same results.
3. **Resources Link:** Click the Resource link to access options, such as My Setup.
4. **Search:** Use the Search area to find candidates and requisitions quickly. Use the toggle to switch from candidate to requisition search.
5. **Support:** Send an e-mail if you have a question.

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**Taleo Tips:**

1. When you click a link within a Channel, you will be presented with information that you own in the system. However, you can change your dashboard filter to view information on which you collaborate or information within your coverage area. Coverage areas are Temple’s 3 or 5 digit department org.
2. It is recommended to use the buttons, links, and other navigation tools to move around the Recruiting Center instead of using the browser’s Back/Next buttons. The Back/Next buttons do not always yield consistent results.
Setting up Frequent Collaborators and Frequent Approvers

You can use the Resources menu to access the My Setup, or the user preferences area of the system. This allows you to set up your own User Preferences for different features of the system. One important feature which will assist with Requisition creation and Approvals is the Frequent Collaborators and Frequent Approvers. Setting up a list of frequent collaborators and frequent approvers will allow you to insert these individuals into a requisition or into an approval list with the click of a button.

1. Once in My Setup, you will see the Frequent Collaborators and Frequent Approvers tabs. Select the Frequent Collaborator Tab.

   ![My Setup Screen](image)

2. Once in the Frequent Collaborators tab, select the Add button to open the User selection window.

3. Once the User Selection window is open, use the Quick Filters in the left pane to search for a frequent collaborator by Name, Email Address, Title or Keyword. Select the Refresh button to populate your results.

   ![User Selection Window](image)

4. Once you have found the right User, add them to the list of Selected Collaborators by selecting the Select button to the right of the user in the list.

5. When all of the Users have been added to your list of Selected Collaborators, select the Done button.

6. You can repeat these steps for the Frequent Approvers as well.
Creating a Requisition – Staff
Both the Hiring Managers and Business Partners/Department Recruiters have the ability to create a requisition.

1. To start the Requisition, click on the Create Requisition button on the Requisitions Channel.

2. The first step is to select a requisition template. The template is selected by entering the PCN of the position you wish to fill.
   a. A valid PCN is required before you start the requisition. Please check with your Human Resources Business Partner if you have any questions about the title, e-class, or grade associated with the PCN.

The format of the PCN is:
- Full-time Staff Position: 6 digit all numeric code
- Part-time Staff Position: R followed by your 5 digit org
- Temporary Staff: P followed by your 5 digit org

Taleo Tip: If your PCN starts with an “R” or “P” you will only use a requisition template/PCN that includes your 5 digit org.
3. You can search for PCN’s by using a Quick Filter. For example, if you enter the first few digits of the PCN, then select the refresh, the following displays.

![Requisition Template Selector](image1)

4. Click the Select button next to the PCN desired. Your Requisition Template will then populate with your PCN and the template title.

**Taleo Tip:** You may directly enter data into template fields and the field will begin to auto-complete. The data takes a few seconds to populate. If your data is not underlined, then you do not have a valid entry.

![Requisition Template](image2)

5. Enter the **Hiring Manager**. This can be your own name if you are performing that role. Again, you may type in the last name slowly and wait for the field to populate, or you may use the **Quick Filter** search. The name must appear underlined to be valid. Select **Next** when all of the data is filled in.

![Create a Requisition](image3)
6. Next, you will enter the organization. Start to type your 5 digit Home Org and suggested values will populate. Select the org desired. If your org code does not appear in the suggested values, please request a PCN with your org code from your department’s Budget/Finance chief.

7. The next step is to enter the location. Enter the campus, name of the building, or address and suggested buildings will populate.

8. For new hires working:
   a. **100% onsite** – Please select the appropriate location on campus
   b. **100% remotely** – Please select INSIDE of PA or OUTSIDE of PA for the location
      i. The INSIDE or OUTSIDE location is determined by where the new hire lives.
      ii. When the location of the new hire is unknown, select Location INSIDE of PA as the default. An example of this would be for a requisition for which an actual recruitment would be conducted.
   c. **In a Hybrid format**, both remote and onsite – select the appropriate location on campus.
9. The **Job Field** will populate from your PCN. **Do not change what is entered in this field.**
   a. You can include a category for applicants to search for when applying for positions. Click on the selector icon to open to the category selector.

   ![Job Field Selector](image)

10. Under the **Quick Filters** section, use the **Type** field and enter **Staff**. Use the filter button or click **enter** to return the results. Then, click **Select** next to the category appropriate for the position.

   ![Quick Filters](image)

11. Select **Create**.
Requisition Structure – Staff

There are different sections in the Requisition which need to be reviewed and completed. All required fields are marked with a red asterisk *. 

Taleo Tips:

1. **Change the Show fields required to: Request Approval.** This will display all of the fields required for approval as opposed to just the fields required to Save the requisition. This does not send the requisition for approval.

2. To help determine if there are any remaining fields to complete, use the Diagnostic Tool. The right panel will expand automatically when you click on the Diagnostic Tool and will display any fields that need to be updated in order to Save or Request Approval.

1. Requisition Structure

Identification

You will need to enter information in this section such as:

1. **Posting Title:** This can be edited to the specific role for the Staff employee
2. **Number of Openings:** This can be edited to be as many positions as needed
3. **Banner Home Org:** same as the organization from the previous page
4. **Department Description for Offer Letter** (department name to populate in the offer letter): same as the organization from the previous page
5. **Banner Check Distribution:** same as the organization from the previous page
6. **Justification for the position:** New position or Replacement
   - If this is a replacement, you will need to enter the name of the previous incumbent
7. **Name and TUId of Supervisor:** if the supervisor is not listed contact Taleo Help for assistance
The **Supervisor** field is very important as this field will be imported into Banner and feed other systems such as the **Org Chart**. You can start to type a **name** or a **TUid** and the field will start to populate. Make sure the entry is underlined so you know it is valid.

**Taleo Tip:** Some supervisors use their middle initial which might cause the supervisor to appear as not listed.

As an alternative, you can hit the **Quick Filter** button. Type in a first name or last name, click the **Refresh** button and you will get an appropriate selection list.
Owners

1. Staff requisitions will have three fields for Owners. The Hiring Manager should already be filled in with your own name. This will make you an owner of the requisition.

2. The Business Partner/Department Recruiter field will be the Human Resources Business Partner you are working with on the requisition. Begin typing the name of your HR Business Partner and click on their name from the dropdown options given. You can also use the selector icon to filter a list of names. You do not need to select a Talent Acquisition Specialist. This field will be completed by the Business Partner.
Collaborators

1. You may choose to add Collaborators to your requisition. Select the individual names by clicking Modify to bring up a list of Taleo users.

2. You can also select Add Frequent Collaborators if you have set up your personalized list.

3. If one of your Frequent Collaborators does not need to be on this requisition, you can use the Modify button to adjust the list for this requisition only. Once you are in the User Selector screen, hover over the individual’s name. A gray box with an X will appear. Select the X to remove the individual. Select Done when you have completed the edit.

2. Process

This section displays the system workflow being used. Do not change the candidate selection workflow for any reason. The Additional Information section is used for internal use only. Depending on your access to the system, the Additional Information section may be located within the Requisition Structure.
3. Job Information

Profile

This section contains data such as shift, targeted start date, earning code (use REG for all) and the Compliance questions.

<table>
<thead>
<tr>
<th>Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
</tr>
<tr>
<td>Part-time</td>
</tr>
<tr>
<td>Shift</td>
</tr>
<tr>
<td>Day Job</td>
</tr>
<tr>
<td>Job End Date</td>
</tr>
</tbody>
</table>

[Image]

Compliance Questions - Answers to these questions trigger processes in the background. These are required for all requisitions. **Not Specified** indicates an answer has not been given. You must choose a Yes or No answer.

<table>
<thead>
<tr>
<th>Chemical Right to Know required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position is required to have Chemical Right to Know training.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Working for a JCAHO accredited unit?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position is required to have a JCAHO compliant Employee ID Badge.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Handle Purchasing Cards, Cash, Checks or Credit Cards?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position will be issued a purchasing card or will handle cash, cash equivalents, checks, or credit cards. A yes answer results in a background check.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unsecured Access to Radioactive Material Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position needs access to areas restricted due to the presence of radioactive material. A yes answer results in a background check.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hepatitis B Vaccination Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position has the potential to be exposed to blood borne pathogens.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Is this a Campus Safety position?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position will be a Campus Police or Campus Security. A yes answer results in a background check.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Has direct contact or routine interaction with minors 10 years old or younger?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Minors include high school students who are taking courses at Temple while enrolled in high school. Minors exclude prospective students visiting the campus or matriculated students who are enrolled at Temple.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Working in clinical setting?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position will be required to take additional training on blood and airborne pathogens and/or Sanctioned Persons checks.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Is this an NIH funded position?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position will be required to have NIH mandated Sanctioned Persons checks.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Working with Live Animals?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position works with live animals.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Driving of a Temple owned vehicle required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position will be required to drive Temple owned vehicles only. A yes answer results in a background check.</td>
</tr>
</tbody>
</table>

**Taleo Tip:** If all of the answers are no, you can save time by navigating to the first question and then typing in N then tab, N then tab, etc. This can also be done using the Y key for Yes answers.
Compensation

1. The Compensation section displays the basis of pay for the staff employee. All staff requisitions pull in the pay basis from the PCN. This will reflect a pay basis of either Hourly or Monthly at the requisition level.

2. DO NOT make any changes to this section.

3. Banner Hours per Week can be chosen from drop-down lists. For Banner Hours, please choose the correct number of hours this position will be working per week.

4. In the Anticipated Salary field, enter the salary you are expecting to pay for this position.

5. If you see Posting Rate (most Hiring Managers should not), leave this blank for Human Resources to complete.

6. Earn Code: Leave this set to REG
Job Description

1. For any requisition created, you need to complete the Internal Job Description field. You must copy and paste using the HTML editor.

2. You have the option to Paste as Plain Text or Paste from Word.

3. Even if you are using a generic template to create your requisition, you will need to update fields.

4. Since you are posting a Staff position, you must include the T Grade in the internal job description section.

5. If you need to post the position externally you can use the Copy From function to pull your data from the internal job description into the External job description. Select Done.

6. Once your data is pulled from the internal job description, remove the T Grade in the external job description section.

7. Once the requisition has been saved, add the job description and position description as attachments on the requisition.
**Questionnaire**

This section displays questions to be answered by the candidate who is applying to requisitions. The *Eligibility Questions* will be utilized on all requisitions. The applicant’s selected answer will have a **green checkmark**.

1. Additional questions may also be included. Click **Add** under the **Job Related Questions** section.

2. Utilizing a keyword you can use the **Quick Filters** on the left to find a question you want to add, then **Select** to add the question to your list.

3. Once the questions are added, choose **Required** for the applicable answer from the drop-down menu on the right-hand side of the page. This will indicate to the system which answer is the most preferred answer. If you select **Asset** this will be the second most preferred answer.
Saving a Requisition

All fields should be filled in and the requisition should be ready for approval. At the top of your page, you will have three options.

1. **Save**: can be used throughout creating the requisition to ensure your work is being saved as you complete the fields.
2. **Save and Close**: saves your current work and closes out of editing mode. This can be chosen if you need to stop working on your requisition and return later to continue editing.
3. **Cancel**: exits out of the requisition without saving changes.

**Taleo Tip**: If you save your requisition before it is complete and will need to return to it, you will need to click the **Edit** button to make changes. Once a requisition is open and approved, the **Edit** button will no longer be available.

**Taleo Tip**: As you move through the requisition, the **status box** on the left will update and display the status of the requisition.
**Diagnostics Tool**

**Taleo Tip:** This tool is critical when determining why you are unable to save a requisition.

1. Open the **Diagnostics Tool** on the right-hand side to ensure all fields have been completed. If any field requires information, it will be listed in the **Diagnostics Tool**.

2. Since you are in the editing mode, select the specific item that needs to be completed to be brought directly to that section. Once all items have been completed, select **Save** located at the top left-hand side of the requisition. Now that the requisition is ready for approval, the **Diagnostics Tool** will read **File ready for approval**.

3. If you save your requisition before it is complete and need to return to it, you can select the **Edit** button to make changes. Once a requisition is open and approved, the **Edit** button will no longer be available.
Requesting Approval for Requisition

1. If you are a Hiring Manager, the system will default to your Business Partner/Department Recruiter as the first approver. If the position is grant-funded, then you must add your Research Administration contact as an approver.

2. To add department approvers, click on Add Approvers on the bottom left. You are able to search for approvers in the new window to add to your list. When you are ready to request approval, add a comment in the comment box and select Done. An email will be sent to the Department Recruiter to approve the requisition, starting the approval chain.
**Taleo Approver Role Instructions**

Requisition approvers in Taleo are able to review requisitions sent to them for approval. After reviewing the information on the requisition, respond with your approval and leave comments for other approvers. This can be done from the approval email or from the online website.

**Email**

1. When a requisition is sent for approval, you will receive an email from Temple Human Resources, via a “No Reply” email address.

   ![Email Example](image)

   **Requisition Approval Request**
   
   Dear Colleague:
   
   Requisition Approval Request
   
   Requisition Title: Director-Collaborator Test
   Requisition ID: 18000996
   Requested by: Dawn Lomden
   Comments: Demonstrating Req Approver role.

   Please be advised that the requisition above has been sent to you for approval. Please click below to view requisition details and respond as soon as possible.

   **Respond**

   Best regards,
   Human Resources Department
   Temple University

   Replies to this message are undeliverable and will not reach the Human Resources Department. Please do not reply.

2. The requisition title, ID number, and comments will be visible in the body of the email, along with the name of the person requesting approval.

3. Select **Respond** in the body of the email.
4. At the bottom of the page, select **Requisition Details** to review the requisition information in a new page.

5. After reviewing the requisition details, go to the dropdown menu in the middle of the page to choose the appropriate response.

6. Finally, provide a comment if necessary for other requisition approvers and requisition owners to view. Select **Done** to submit your response.
Taleo System

As an approver, you can also log into the Taleo website to view requisitions to approve or reject them.

1. To access Taleo, select the Taleo Talent Management System link in TU Portal, under TU Applications. Then select Recruiting to open your main page of Taleo.

2. Once you are logged in, select View Requisitions to be taken to a list of the requisitions you have access to.

3. Select the title of the requisition you need to approve, which will show with a status of Pending.
4. When the requisition opens, you can review the requisition information. After reviewing the requisition, go to More Actions and select Decide on Approval.

5. In the new window, use the dropdown menu to choose your Decision for approval. You then have the option to include a comment for other approvers. Select Done on the bottom, right-hand side to submit your response.
Viewing Candidates

After candidates have applied to your requisition, you will be able to view them through Taleo.

From the dashboard, you can navigate to candidates in two ways:

1. **View Requisitions:** Navigate from Center Stage to view a full list of your requisitions. On the left-hand side of the page, the number of candidates is shown under the Candidate Count icon.

   Select the blue number to bring up the list of candidates for this job. You can click on each candidate’s name to review their profile and job submission.

2. **View Candidates:** Navigate from Center Stage to view lists of candidates on various requisitions. A list of active requisitions will show on the screen. You can toggle the gray triangle on the left-hand side to show a list of candidates for each requisition. To the right-hand side of the list, you are able to view how this person applied (i.e. Online or Matched to Job).
Changing Step/Status of Candidates

Navigate to your requisition and click on the blue number of candidates to view the candidate list. All new candidates should appear in the Step/Status of Manager Review: Manager to Review. You are able to move candidates through the process in groups or one at a time.

Moving Candidates in Groups

For some jobs, the Hiring Manager, Talent Acquisition Specialist or Human Resources Business Partner/Department Recruiter may wish to move multiple candidates at one time. To do so, ensure you are viewing the candidate list for your requisition.

1. Check off all candidates to be moved to the next Step/Status. All candidates chosen will be moved to the same point in the process. Candidates must all start at the same step/status (i.e. all candidates below are shown in Manager Review: Manager to Review).

![Candidate List Example](image-url)
2. Click on the More Actions tab to bring up a list of options. Choose the Change Step/Status option to bring up a pop-up box. The box will show the current Step/Status at the top and the next move in the process.

![Change Step/Status](image)

**Taleo Tip:** In the Change Step/Status box, you have two options:

A. **Save and Continue:** By choosing this option, the box will remain open and automatically bring the candidate into the next step or status. Only use this option if you are moving candidates through several steps/statuses at one time.

B. **Save and Close:** By choosing this option, you are moving the candidate one Step/Status at a time. It will save your choice and close the window, bringing you back to the candidate list and showing the updated Step/Status.
3. The candidates can be moved along the process as far as you wish to take them at that time. You can continue to update the Step/Status up to the Offer stage. Once a candidate is in the Step/Status of **Offer: Offer to be Made**, you will need to stop to create the offer. The Department Recruiter will receive an email indicating that the candidate is ready to receive an offer. Their updated Step/Status can be viewed in the candidate list.
Moving Candidates One at a Time

1. Navigate to the candidate profile either from the requisition or the View Candidates tab on your dashboard.

2. While in a candidate profile, locate the More Actions tab at the top of the page. Click on the arrow in the tab for a drop-down list. Choose the Change Step/Status option.

3. A pop-up box will appear, giving options of steps to move the candidate through. The box will show the current Step/Status at the top and the next move in the process. You can review each applicant and change the status accordingly.
   a. If you wish to interview a candidate, you will need to stop changing the step/status of the candidate at “Manager Review: Proceed to Interview” by choosing Save and Close.

4. After you complete the interviews you can continue moving candidates through the Step/Status box to advance them through the process until the Offer: Offer to be Made step/status. Here, the Human Resources Business Partner/Department Recruiter or Talent Acquisition Specialist will need to go into the Offer grid to create an offer.

   Taleo Tip: If you status an applicant by mistake, you are able to move back a step. From the More Actions tab, choose Revert from the drop-down menu. A pop-up box will appear to move the candidate back a step. Comments are required to be included when the Revert option is chosen.
Creating an Interview

1. Ensure all candidates you wish to bring in for an interview have the Step/Status of Interviews: Interview Scheduled.

2. From the candidate list within the requisition, check off the candidate you wish to schedule an interview with.

3. Go to More Actions and select Schedule an Interview

4. Fill in appropriate fields in the new window. Most of these will be auto-populated with information. You can make edits to any field. Select Next when done.
   a. Subject
   b. Organizer (this should be left as your own name)
   c. Location
   d. Start and End date and times
   e. Default Time Zone (do not change, should reflect Eastern Time)
   f. Reminder
**Taleo Tip:** Check off the box for sending an invite to the candidate if you want them to receive an email with this information as well. Uncheck the box if you do not want the candidate to receive an email from Taleo.

5. Next, choose the **Interview Attendees** to send an invitation to. The **Quick Filters** on the left-hand side of the window will allow you to jump directly to the name or email address of the person you are searching for. Click **Select** on the right-hand side of the window to add attendees to your list.

6. Click **Next** when all attendees have been added.

7. In the next window, the **Message Template** field will indicate the **Interview Notification** template as chosen. This can be left as is. You may also include an additional message in the invitation email, to appear at the bottom of the email. Otherwise, the email will contain only the information given for the **Interview Properties** window.
8. You are also able to send a link to the candidate file or the requisition file to attendees, excluding the candidate. Click **Done** to send the interview invitation.

9. Once the interviews are completed, interview evaluation forms should be completed.
Sending out and Reviewing an Interview Evaluation

1. Go to your candidate’s profile in your requisition by selecting their name from the candidate list. You will want to see the name of your requisition, with your candidate’s name over the top.

2. Select the Interviews tab and scroll down to section 4. Resources. Select Add, under the Participants section.
3. Participants to receive an Interview Evaluation form can be added from this window. The upper section can be used to add people who are not users of Taleo. The lower section can be used to add participants who have access to Taleo.
   a. For the upper section, manually type in first and last name and the email address of your participant. Select Add when names are entered.
   b. For the lower section, use the Quick Filters to jump to the name or email address of your participant. Click Select to add a participant to the list.

Select Done when all participants are added to your list.

4. Right above Participants, you will see Questionnaires Attached to Requisition. Select the radio button next to the Interview Evaluation Form and select on Send Request.
5. In the new window, select the dropdown for **Select User** to choose participants to send the evaluation to. You may also check off the **Candidate file** and **Requisition file** below if you wish to share these files with the participants.

Select **Send** when done. An email will be sent to all participants with a link to the interview URL. All participants can complete the evaluation and submit it to Taleo.
6. To view completed evaluations, go back to your requisition and select the candidate’s name to open their profile. Select on the Interviews tab and scroll to **2. Completed Interviews and Evaluations**. You will see a list of all completed evaluations. Check off the evaluation you wish to review and select **View Results**.