Taleo Talent Management System Training

STUDENT WORKER HIRING MANUAL

Last Updated: 3/31/2020
Student Worker Hiring Manual
If you have any questions or need assistance, send an e-mail to taleohelp@temple.edu or call 215-204-4008 (1-4008).
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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.

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.

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 Done.

6. You can repeat these steps for the Frequent Approvers as well.
Creating a Requisition – Student Worker

Both the Hiring Managers and 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:

**Student Worker** S followed by your 5 digit org

**Taleo Tip: Do not use a requisition template/PCN that does not have your org code.**
3. You can search for PCN’s by using a Quick Filter. For example, if you enter S then hit refresh, the following displays:

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.

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.
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.

![Create a Requisition](image)

7. The next step is to enter the location. Enter the campus and suggested buildings will populate.

![Location Selector](image)

**Taleo Tip:** If your Student Worker is working from home or working remotely, you can select **Location INSIDE of PA** or **Location Outside of PA**. If you are hiring multiple Student Workers to one position, the location must apply to all Student Workers.
8. The Job Field will populate from your PCN. **Do not change what is entered in this field.**

   ![Job Field](image)

9. Select **Create**.

   ![Create Button](image)

**Requisition Structure – Student Worker**

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**.

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**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 Student Worker
2. **Number of Openings:** This can be edited to be as many positions as needed, based upon your anticipated student workers for the type of position for the year.
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. **Name and TUid of Supervisor**: if the supervisor is not listed contact Taleo Help for assistance

![Image](image.png)

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 use 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

Department Recruiter

1. You will be entering the name of the Department Recruiter for your department. This is the person who will be creating and extending the offer and hiring the employee in the system. If you have the correct access, this could be yourself. Otherwise, this should be someone in your department with Department Recruiter access to Taleo.

2. You can start typing in the name of the Department Recruiter. Click on the name from the options given by Taleo.

Hiring Manager

1. The second owner of a requisition is the Hiring Manager. This is typically the person creating the requisition, managing the requisition, and candidates up until the offer is to be created.

2. You can start typing in the name of the Hiring Manager. Click on the name from the options given by Taleo.
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. All student worker requisitions which may be used to hire student workers who are paid with federal work-study funds must have James Amey (Student Financial Services) as a collaborator.

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.

All student worker requisitions which may be used to hire student workers who are paid with federal work-study funds must have James Amey (Student Financial Services) as a collaborator. James can be added as a Frequent Collaborator in My Setup in order to be added during the requisition creation process.

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.
3. Job Information

Profile

This section contains data such as schedule, shift, and Compliance questions.

![Profile Table]

**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>Question</th>
<th>Answer Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chemical Right to Know required?</td>
<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>
<td></td>
</tr>
<tr>
<td>Working for a JCAHO accredited unit?</td>
<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>
<td></td>
</tr>
<tr>
<td>Handle Purchasing Cards, Cash, Checks or Credit Cards?</td>
<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>
<td></td>
</tr>
<tr>
<td>Unescorted Access to Radiocative Material Required?</td>
<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 radiocative material. A yes answer results in a background check.</td>
<td></td>
</tr>
<tr>
<td>Hepatitis B. Vaccination Required?</td>
<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. A yes answer results in a background check.</td>
<td></td>
</tr>
<tr>
<td>Is this a Campus Safety position?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position will be Campus Police or Campus Security. A yes answer results in a background check.</td>
<td></td>
</tr>
<tr>
<td>Has direct or routine interaction with minors 18 years old or younger?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Minors include high school students who are taking courses at Temple while enrolled in high school. Minors also include prospective students visiting the campus or matriculated students who are enrolled in Temple.</td>
<td></td>
</tr>
<tr>
<td>Working in clinical setting?</td>
<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 Sanctioned Persons check.</td>
<td></td>
</tr>
<tr>
<td>Is this an NIH funded position?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position will be required to have NIH mandated Sanctioned Persons check.</td>
<td></td>
</tr>
<tr>
<td>Working with Live Animals?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Answer yes if the person in this position works with live animals.</td>
<td></td>
</tr>
<tr>
<td>Driving of a Temple owned vehicle required?</td>
<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>
<td></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 student workers. All student worker requisitions should reflect a pay basis of Biweekly at the requisition level.

2. DO NOT make any changes to this section.

3. The FLSA section pulls into the requisition from the PCN. This should also be left as is.

<table>
<thead>
<tr>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Basis</td>
</tr>
<tr>
<td>Annualization Factor: 26</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FLSA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over-time Status</td>
</tr>
</tbody>
</table>
Job Description

1. All student requisitions that have the potential to pay student workers using federal work-study funds must have a job description that meets Student Financial Services guidelines.

2. Student Financial Services has job description templates available for your use. These can be accessed through the University Forms channel on the Staff Tools tab of your TUPortal.

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

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

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

6. Student Worker positions are not posted externally. You do not need to enter a job description in the external job description field.
**Questionnaire**

This section displays questions to be answered by the candidate who is applying to a requisition. 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**.

![Diagnostics Tool Image]

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.

![Edit Button Image]

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taleohelp@temple.edu
Requesting Approval for a Requisition

1. If you are a **Department Recruiter** and have the appropriate authority to approve a requisition, then you can **self-approve** a requisition by selecting the **Request Approval** from **More Actions**.

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

3. 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.

4. If you are the **Department Recruiter** on the requisition you have created, your name will appear first in the Request Approval box. Your approval will be given automatically since you created the requisition.
**Taleo Approver Role**

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]

   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.

![Requisition Approval Request](image1)

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

![Requisition Information Summary](image2)

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

![Comments](image3)
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 TUPortal, under TUApplications. 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. It will have a status of Pending.
4. When the requisition opens, you can review the requisition information. After reviewing the requisition, go to More Actions and choose to 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.
Post and Unpost a Job

Posting a Position

This step is required if you plan on potentially paying student workers with Federal work-study funds. If you are not using Federal work-study funds, this step can be skipped. It is recommended that you post the position if you are not sure what type of funding you will be using, work-study vs non-work-study.

1. Navigate to your approved requisition and open it. From the gray tabs across the top of the page, choose **Posting and Sourcing**.

![Posting and Sourcing](image)

2. Once in **Posting and Sourcing**, locate **Career Sections** at the top of the page. Select the **Modify** button. A pop-up box titled **Posting Requisitions** will appear with posting options.

![Posting Requisitions](image)

3. You can choose when to post the requisition, **Start Date**, and when it should be taken down, **End Date**. Use the drop-down menus to pick from a range of timeframes or use the calendar icon next to each drop-down to pick a specific date.

![Posting Requisitions](image)
4. Student Worker positions can only be posted to the Internal-Student career site. Ensure that the box under Posting Status is marked for Internal-Student only. When you are finished, select Done to post the requisition. The window will close out. A list will be shown in the Posting and Sourcing tab to indicate the timeframes you selected for the job posting.

Taleo Tip: There is no external student worker career site. Student worker positions are only posted internally.

5. If you want to make any changes to the posting dates, you are able to go to the Posting and Sourcing tab in your requisition at any time. The Modify button will be available to you. You can extend or shorten an end date at any time.
Unposting a Position

1. To unpost a position and remove it from the job site, you can use the Modify button to open the Posting Requisitions window. **Uncheck the box** on the far right side of the window. Select Done to unpost the job.

2. After a job has been unposted, you are able to use the Modify button to repost the job if needed. Follow the directions as indicated above to post a job to the student worker career site.
Match a Candidate to a Requisition

1. Navigate to your approved requisition from your dashboard. On the top, right-hand side of the screen, you will see a search box.

2. In this search box, enter the name of the candidate or TUid you are searching for. Select the button with the magnifying glass to the right, or hit Enter to search for that person.
   a. The search function is specific, you will need proper spelling of names.

3. The name you searched will return results. If there is more than one profile for your candidate, all names will appear. First, check off the box that appears on the left-hand side of the candidate list for the candidate you wish to match to your requisition. Then, select the icon of the green figure with a chain link at the top of the list.

   **Taleo Tip:** Only internal profiles with the purple house icon should be matched to a student worker requisition. Matching an external profile will cause the hire to fail to reach Banner and Kronos.

4. Internal candidates will be shown with a purple house icon. All students or internal employees should have an internal symbol.
5. After selecting the icon with a green figure with a chain link, a pop-up box will appear with a list of your requisitions. Click **Select** next to the requisition to which you are matching the candidate. The name of the requisition will appear under **Selected Requisitions**. Select **Done** to match the candidate.

![Selected Requisitions](image)

6. After clicking **Done**, a pop-up box will ask if you want to send an email to the candidate. Select **No**, since the e-mail will invite the candidate to apply for the job and you have already matched them to it.

![Email Confirmation](image)

7. Navigate back to your requisition. It will now show a new candidate has been added.

![New Candidate Added](image)
Viewing Candidates

After candidates have either been matched or applied to your requisition, you will be able to view them in 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 or 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).
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.

![Image of Taleo interface showing More Actions and Change Step/Status]

**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 from 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. 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 Department Recruiter 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 selected.
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.
   - Subject
   - Organizer (this should be left as your own name)
   - Location
   - Start and End date and times
   - Default Time Zone (do not change, should reflect Eastern Time)
   - 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 the 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 function 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 Select User to choose participants to send the evaluation to. You may also check off 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.

EMAIL TO PARTICIPANTS

Dear Dorothy Ryan,

Please complete the following evaluation:

Evaluation: Interview Evaluation Form
Requisition: Football Head Coach
Candidate: Hooter Owl
Expiration Date: 1/13/17

Click the link below to access and save the evaluation.

[Evaluation URL]

Best regards,
Human Resources Department

 Replies to this message are undeliverable and will not reach the Human Resources Department. Please do not reply.
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.
Creating and Extending an Offer – Student Worker

1. Navigate to your requisition, select the blue number to open your candidate list, and select your candidate. You must be in the candidate’s profile to create the offer. Ensure the candidate is in the Step/Status of Offer/Offer to be Made.

2. Go to More Actions and select Create Offer. This will open up the Offer grid.
Offer Grid

Top Section

1. Enter:
   a. **Pay Start Date**—the date of the student’s first day of work
   b. **Pay End Date**—enter a date only if the position has a defined end date
   c. **Offer Expiration Date**—field will autofill

   ![Image of Offer Grid]

   **Taleo Tip:** By default, the box labeled **Tentative** is checked. This means that the job start date is tentative. For student workers, **uncheck this box**. If left checked you will need to update the start date in order to hire the student worker.

General Terms

1. Next enter the **hourly rate** and the **pay basis**. Be sure to select **Hourly** from the **Pay Basis** drop-down menu.
Details

1. Next, select a value for Work-Study. **Not Specified** is the default, but is not recognized as an option. If the student does not have work-study choose **None**.

2. Unless PHEAA, Prepaid, America Reads, On Campus PHEAA, or Special – Off Campus, select Federal Work-Study to label the student worker to be paid with Federal Work-Study at any time during their term of employment.

3. If you are not sure if a student was awarded Work-Study, select the **Federal Work-Study** option. Banner will automatically update if the student was not awarded work-study funds.
Details

1. If needed, the **FOP index** is available. This is to be used if you do not want the default FOP from Banner Position Control to default into the job.

   ![FOP Index](image)

   **NOTE**: If you need to look up the **FOP Index**, please sign in to TUPortal and go to the Banner tab, Finance Channel.

   - Operating Funds (100000): the corresponding **org** is equal to the index
   - Non-operating Funds (all except 100000): the **fund number** is drop-down to the index

2. Select **Save and Close** when you are done. If you are missing any fields, an error message will appear. After you save the offer, an edit button will appear so that you may make revisions if necessary.

3. If needed, you can now route the offer for Approval to others in the department. Recruiters with proper authority may extend the offer without needing additional approval.
Route for Approval

1. Go to More Actions and click on Request Approval.

2. To add 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.

3. When you are ready to request approval, add a comment in the comment box and click Done. An email will be sent to the Approver alerting them that action is needed.
Extend the Offer

1. Click on the candidate’s name in your requisition to open their profile.

2. Go to More Actions and select Extend Offer.

3. Recruiters will see the following pop-up warning box. If you have the proper authority, you may click Yes to self-approve the offer. Otherwise, you must route for approval.

4. An Extend Offer dialogue box will appear. Select Extend in Writing and click Done.

5. Select E-Mail in the Send Offer Letter dialogue box. This is specific to student workers only.
Taleo Tip: Do not select e-offer for student workers. This causes confusion for the student worker. Only select Email.

6. On the right-hand side of the From template section, select the icon to open up the offer letter templates.

7. Then Select the template for the offer letter. For student workers, there is only one option.

8. Then select Next.

9. To view the E-mail offer, click on the recipient link. You can correct errors in the email offer letter if needed. If 0 errors are listed, you do not need to review or modify the email offer letter.
10. After reviewing the letter, click **Save** and then **Send**.

11. A dialogue box will pop up. Type an email message in the pop-up box then select **Send**. The offer letter will be attached to the email as a PDF. If nothing is written here, students will receive a computer-generated email they may mistake for spam.
12. The Status on the Candidate record will be updated to **Offer Extended**.

```
ID: 12824  
Status: Offer
```

13. To access a copy of the student’s email offer letter, click on the **History** tab in the candidate’s profile.

```
Job Submission  
Ryan, Dorothy  
ID: 12824  
Required: 0 / 0  
Assets: 0 / 0  
Step: Offer  
Status: Extended
```

14. You will see the title of the email offer letter in the **History** tab highlighted in blue. You can click on the title of the email offer letter to view a copy or print it.
Hiring – Student Worker

1. Student Workers are not required to respond to the e-mail. They do not accept offers in Taleo. Therefore, assume that they accept the job. Go to More Actions and choose Capture Response. It will default to the candidate accepting the offer.

2. Click Next to capture the start date. In the next window, confirm the start date is correct and click Done. Uncheck Tentative if it is checked.

3. Next, click on More Actions again and choose Change Step/Status.
4. The step and status will automatically update to **Hire: Hired**. The update of status to Hired will update Banner overnight. You do not have to change anything in this box.

5. **Click Save and Close** to finalize the hire.

**Taleo Tip:** If you are not receiving the option of **Change Step/Status**, you may still have the **Tentative** box from the offer grid marked. To change this, go to **Update Start Date**. Uncheck **Tentative** in the pop-up box and click **Done**.
6. If the hire is the last opening on the requisition, a warning will appear notifying you that the hire action will fill the requisition. Filling the requisition will automatically remove the opening from the career site and all applicants on this job will be able to view that the position is filled.

7. Once a requisition is filled, either through the final hire or manually from More Actions, all remaining candidates in the Manager Review or Interview steps will be automatically be sent rejection emails.
Candidate Facing Material – Student Worker

1. This is the e-mail that the student worker receives for the job offer.

   Attached is the offer we discussed. We look forward to working with you.

2. When the student clicks on the attachment, they can view the offer letter.