

User Guide

Position Manager 11

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Welcome

Welcome to Position Manager®, the powerful web-based Applicant Tracking solution that puts you in command of your recruiting and hiring needs.

The Position Manager system:

- Simplifies management tasks for both job opening and applicant data.
- Streamlines the tracking and publicizing of your current job openings through a hosted career site.
- Enables you to easily create and maintain a database of job titles, summaries and descriptions.
- Automates publishing open positions to your career site, employee career site and third party sites.
- Collects, organizes, and tracks applicant information in your customized database.
- Records statistical information regarding hits to your internet employment site as well as applicant responses.
- Requires no prior technical knowledge for new users.

This guide introduces you to Position Manager as an easy-to-use data management tool simplifying all of your recruiting efforts.

System Basics

Before jumping into Position Manager, there are a few questions you should answer that will help you efficiently navigate through the system.

1. How does Position Manager really work?
2. What will be your role in the process?
3. What tasks are you responsible for in your role?

We've addressed each of these items in the sections below to help you get up and running quickly. It might also be helpful to review some of the [basic concepts of Position Manager](#).

Position Manager workflow

Position Manager is more than a job and application database. It provides a structured workflow that users will follow as they move through the process of defining and filling a job opening. This workflow helps organize and streamline the hiring process.

The workflow for Position Manager can be simplified into a few basic steps. These steps may vary depending on your organization's site configuration.

1. A requisition, or request to hire, for a job opening is created.
2. The requisition is reviewed and approved.
3. The approved requisition gets posted to a job board.
4. Applicants respond to the job posting.
5. Applications are received and reviewed to identify the best candidates.
6. An applicant is hired, and the job opening is filled.

Though customizations may change certain details of this workflow, it remains the basis for all Position Manager systems.

Who are you?

An important question to answer is, who are you? Or, more specifically, What is your *role* in Position Manager? The answer will determine what duties you will be responsible for as you work in the Position Manager system.

- If you're responsible for determining when a position needs to be filled, and what the requirements for those openings are, you're a **Hiring Manager**.
- If you need to review job openings and determine if the requirements associated with it are correct before it's posted, you're a **Requisition Approver**.

-
- If your main duty is to post approved requisitions, collect applications and review them to identify the most qualified applicant(s), then you're a **Recruiter**.

There are even some instances when you may perform duties for more than just one of these roles.

Tasks for Roles

Now we can break down individual tasks that each user role performs in Position Manager.

Hiring Manager

- [Creates new requisitions.](#)
- [Reviews qualified applicants.](#)
- [Provide feedback on applicants.](#)

Requisition Approver

- [Reviews requisitions.](#)
- [Makes necessary edits to requisitions.](#)
- [Approves or declines requisitions.](#)

Recruiter

- [Posts requisitions to job boards.](#)
- [Reviews applications to the job.](#)
- [Works with the Hiring Manager to qualify and move candidates through the hiring process.](#)

Workflow Basics

When you break down the hiring process, you will discover that it can be quite simple. Following are the basic steps that you need to follow for creating openings and hiring applicants in Position Manager.

1. [Create a requisition.](#) Generate a new requisition for your job opening.
2. [Post a job.](#) Place an approved requisition on job boards.
3. [Review applicants.](#) Examine collected applications from potential candidates.
4. [Hire an applicant.](#) Identify the most qualified applicant and bring them on board.

Click the links for each step above for additional information about the process.

Create a Requisition

Requisitions start the entire process in Position Manager. Requisitions become job postings, job postings bring in applications, and applications become candidates.

So, to get everything rolling, how do you create a requisition? It's pretty simple:

1. Click the **Requisition/Jobs** tab.
2. Click the **Add Requisition** button.

Clicking that button launches a wizard that walks you through the steps required to create a requisition. Each step of the process collects necessary information, such as which job template to use, specific experience requirements for applicants, job descriptions, etc.

By default, Position Manager requires that all requisitions receive [approval from managers](#) before they can be posted as open jobs. However, your site may provide the option to skip the approval step and [fast track a requisition](#) so you can post it immediately.

Post a Job

Job postings allow potential candidates to view the details of your opening (as defined in the requisition you created) and submit an application.

Note: A requisition must be in an "Approved" state before it can be posted to job boards.

A few quick clicks allows you to post a job to job boards:

1. Click the **Job Posting** tab on the *Requisition Detail* page for the requisition you want to post as a job. This displays the Job Posting form for the requisition.
2. Complete the Job Posting form and click the **Post Job** button.

The Job Posting form contains all the necessary fields to post a job. In this form you will provide the required contact details for the opening, as well as determine on which job boards the opening will appear.

Review an Applicant

You've created a requisition and posted it as a job opening. Applicants have submitted their information to the posting. Those applications need to be reviewed.

Reviewing applicants requires quickly weeding through submitted information and vetting those candidates with the best credentials. The less clicks it takes to view that information, the better.

Though each organization may follow a different set of steps for reviewing applicants, Position Manager ensures the process remains simple while still providing the tools necessary to collect and access pertinent information.

A basic review cycle for an applicant may proceed as follows:

1. A recruiter reviews the list of applicants for a requisition. The *Applicants* page makes this easier by populating the [search results table](#) with the information necessary to quickly compare qualified candidates.
2. The recruiter [sends selected applicants to a manager](#) for further review.
3. The manager [reviews the applicant](#) and provides feedback. The manager and recruiter can exchange several messages about the applicant, all of which are tracked in Position Manager.
4. If necessary, users can also [request a custom form be completed](#) regarding the applicant. Other actions can specifically be assigned as well, such as scheduling interviews, checking references, etc.

The exchange of messages is recorded in a Messages and Tasks table found on the *Applicant Detail* page. As the name implies, you can assign tasks to a user if you need them to perform specific actions. These tasks simply serve as reminders for the user.

Hire an Applicant

Once your organization has identified the applicant best suited for an opening, it's time to hire that applicant and bring them on board.

Like many other processes in Position Manager, hiring an applicant is quick and easy:

1. Open the *Applicant Detail* page for the applicant you wish to hire.
2. Select the *Hire Applicant* option from the **Take Action** drop-down list.

This launches a wizard that walks you through the steps associated with hiring an applicant. The wizard covers all aspects of the hiring process, from sending a letter to the selected applicant down to updating the status and notifying other applicants to the requisition.

Getting Started

Welcome to Position Manager! Your company has chosen one of the most powerful, versatile, and easy-to-use talent management systems available for the healthcare industry today.

Before diving into Position Manager, let's review system requirements and some basic concepts about general system use to help you understand system workflows, navigation, and functionality.

- [System requirements](#). Make sure you have the latest and greatest browsers so you're able to take full advantage of all the features and functionality we offer.
- [Downloadable guides](#). A list of user and feature guides that you can download and print as needed. These include quick start materials and general feature overviews.
- [Concepts](#). What's the difference between a requisition and a job posting? What is Screening? All these and more are covered here.
- [Interface basics](#). You can't recruit and hire anyone if you don't know where to go to create requisitions and post them. See how to move around Position Manager and access the different areas available to you.
- [Tips and tricks](#). Check out some of the little features sprinkled throughout Position Manager to help you get things done fast.
- [For Position Manager 10 users](#). Has your organization recently upgraded from Position Manager 10 to version 11? Head here to read about some of the main differences between the two systems so you can locate and use features with ease.

System requirements

At HealthcareSource, our goal is to provide the best possible user experience across the wide range of desktop and smart device browsers. To achieve this goal, we prioritize supporting browsers with the most advanced technology. Our solutions are designed to function with the browser versions we've identified in the chart below as **A-Grade** — we actively test on these browsers to optimize user experience.

HealthcareSource recognizes that some legacy browsers, which we've identified as **X-Grade**, don't provide the technology needed to deliver new features with a modern user experience. In order to continue providing the best solutions and support, we've decided to discontinue support for these X-Grade browsers.

In addition, there are browser versions for which we provide limited support, identified below as **C-Grade**. While we don't regularly test this set of browser versions, customers have found them to work well with our software. Problems reported with these versions may be addressed, but we cannot make specific commitments as to if or when a fix will be available. In some cases, we know of select features or functionality that don't work with these browsers. We do our best to document those cases and make this information available upon request.

By prioritizing A-Grade browsers and discontinuing the support of X-Grade browsers, HealthcareSource can release features more frequently, provide better support, and resolve issues faster. Since Microsoft stopped supporting Internet Explorer 8 in January 2016, we predict that most healthcare organizations will be migrating to newer browsers. However, there are limited options for those who decide to continue using these legacy browsers. For more information, contact support@healthcaresource.com.

Note: Customers requiring Microsoft IE 8 for legacy applications should consider Microsoft Internet Explorer Enterprise Mode.

Please check back with us if you have questions on browser support. We're constantly upgrading our solutions to make them more browser agnostic — this work is ongoing and incremental. We'll notify customers when browser support changes.

A-Grade	C-Grade	X-Grade
Optimal user experience	Adequate user experience	Not supported
HealthcareSource actively tests all A-Grade browsers and reported bugs are addressed with high priority.	HealthcareSource tests a sampling of C-Grade browsers periodically and reported bugs are addressed with high priority.	HealthcareSource doesn't test X-Grade browsers or address reported bugs. There may be limited user experience.
Microsoft Edge*	Microsoft IE 9	Microsoft IE 8 and below
Microsoft IE 11	Mozilla Firefox*	Microsoft IE 10
Google Chrome*		Browsers not listed are X-Grade
Apple Safari*		

**Latest versions*

Caution: HealthcareSource does not currently support the use of Position Manager within multiple browser tabs/windows at the same time. Doing so may cause various data population and/or random system logout issues.

Logging In

Access to Position Manager is controlled by a username and password, which must be entered at the login page in order to use the system.

1. In the address bar of your internet browser, enter the address for your Position Manager website. This opens the login page.

2. Type in a **Username** and **Password** in the available fields.
3. Click the **Log In** button.

If you have entered an incorrect Username and/or Password, the system will display an error message. Click **OK** in this message and re-enter your correct username and password.

When a valid username and password is submitted, you have successfully logged in and are taken to the *Dashboard* page in Position Manager.

Retrieve Username or Password

So many websites, so many login credentials to remember - everyone is bound to forget their username or password every now and then.

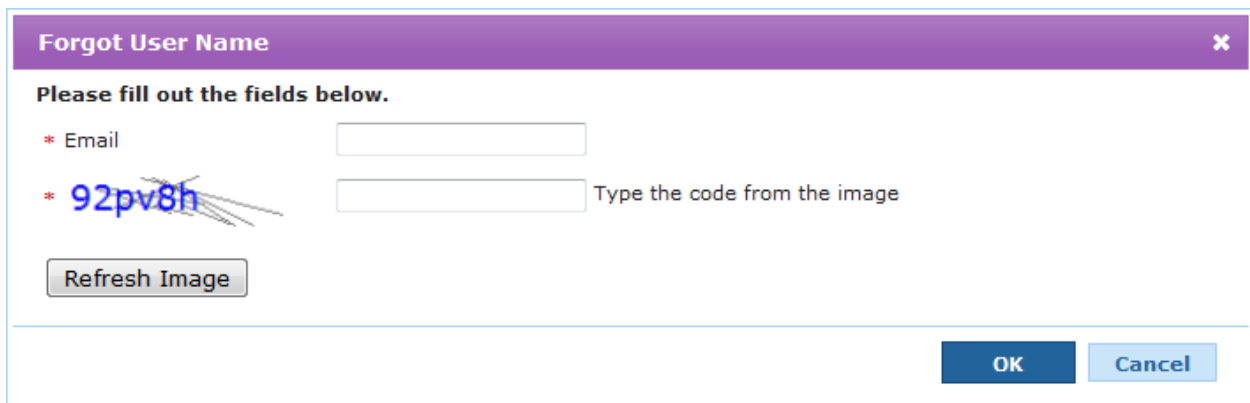
Don't sweat it, though. Position Manager's login page provides links to retrieve both should login overload keep you from remembering your information.

Though, if you forgot your login information, you can't access this help ... so you probably can't read these instructions ... sooo kind of a "Catch-22" paradox happening here ...

Retrieve Username

These steps take place from the main login page for your Position Manager system.

1. Click the **Forgot username?** link next to the **Username** field on the login page. A *Forgot Username* pop-up window opens.



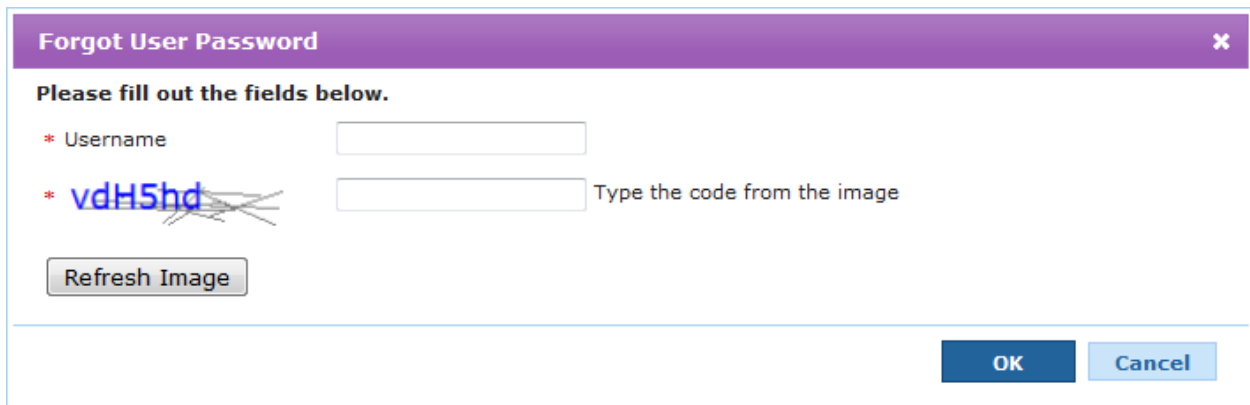
2. In the **Email** field, type in the email address you used to create your account.
3. Type in the verification code into the additional text box in the pop-up.

- Click the **OK** button when finished. A new pop-up window opens stating your username has been sent to the email address on file for your account.

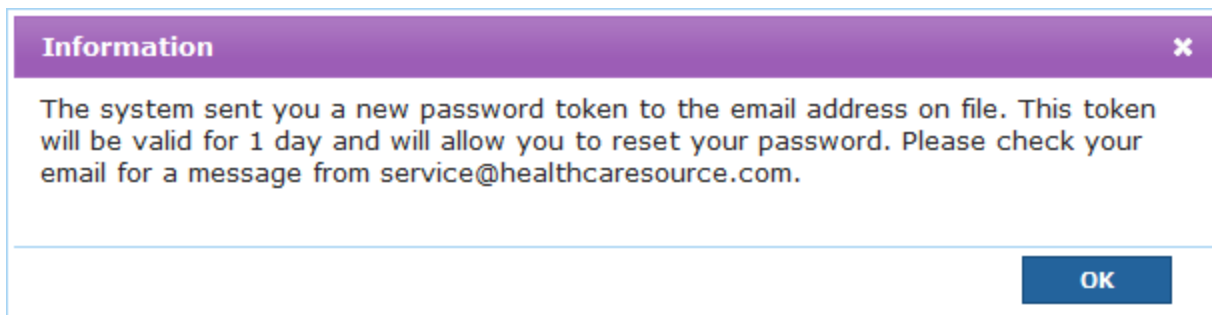
Retrieve Password

These steps take place from the main login page for your Position Manager system.

- Click the **Forgot password?** link next to the **Password** field on the login page. A *Forgot User Password* pop-up window opens.



- In the **Username** field, type in the username for your account.
- Type in the verification code into the additional text box in the pop-up.
- Click the **OK** button when finished. A new pop-up window opens stating a password token has been sent to the email address on file for your account.



- Clicking the link contained in the email opens a window that asks you to create a new password for Position Manager. Once this is complete, you can access Position Manager using the new password.

Position Manager Concepts

There are some key concepts in Position Manager that you should be familiar with to help you quickly navigate and utilize the system. Below are some quick descriptions, as well as links to pages with greater detail on each concept.

Requisitions

[Requisitions](#) are "requests to hire." They drive most, if not all, of the processes in Position Manager. Requisitions are used to create job postings, which are placed on career sites for people to view and apply to.

Applicants

[Applicants](#) are people. Specifically, ones that you are considering to fill a requisition.

Applicants submit applications to job postings. A single applicant can have multiple applications in the system.

Permissions

[Permissions](#) refer to what a user can and cannot do in Position Manager.

The system uses User Roles to control permissions. User roles have a distinct set of permissions associated with them; users assigned to those roles inherit the permission sets.

User roles also determine which selection lists users appear in (i.e. Recruiter or Hiring Manager lists), as well as which views they are presented on the dashboard.

User roles should only be adjusted by system administrators with the assistance of [HealthcareSource Support representatives](#). Please use caution when accessing the User Roles area of Position Manager.

Messages and Tasks

[Messages and Tasks](#) are new concepts for Position Manager, introduced with the release of version 11. They are found on the *Applicant Detail* page, and help managers and recruiters keep track of when certain applicants need their attention for review or general feedback.

There is a new Messages and Tasks table found on *Applicant Detail* pages that lists correspondence sent between managers and recruiters about the selected applicant. If some action is required by a user, a task is assigned and displays in the table until complete.

Onboarding

[Onboarding](#) refers to tasks taken during the process of hiring an applicant. It specifically refers to providing forms

and documents to the chosen applicant for completion and/or review, and tracking the status of those documents.

The New Hire wizard contains an onboarding step which allows users to send a set of documents to the applicant. From within their user profile on the career site, applicants are able to review and complete the necessary documents. Position Manager is then able to monitor and display the status of those documents.

Screening

[Screening](#) refers to the background, assessment, reference, and other types of checks that are done on an applicant during the review and hiring process. These assessments usually include the gathering of data from the applicants, followed by processing of that data by third-party screening providers.

Position Manager integrates many of the screening tools directly with the applicant profile, making the gathering and analysis a simply process for users.

The Concept of Requisitions

A **Requisition** is simply a *request to hire*, and is the main driving force in Position Manager. Without a requisition, you cannot post a job opening, and job seekers won't be able to view and apply to any openings. So it all starts with requisitions.

If your organization has identified a job opening that needs to be filled, a requisition must be created in Position Manager that both defines the specific job opening as well as the minimum professional requirements for people applying for the opening. This information is then sent to your career site or a job board so job seekers can view and submit applications for your opening.

Requisition Workflow

The basic workflow for requisitions goes like this:

1. A requisition is created by a Hiring Manager (or other user with permissions to create requisitions), defining the job opening and minimum requirements for potential applicants.
2. The requisition is sent to a set of defined employees that need to approve the requisition (Requisition Approvers). The Requisition Approvers determine if the opening is legitimate and needs to be filled, and if the requisition accurately reflects the opening and requirements.
3. Once the requisition is approved, it is sent to a Recruiter (or Human Resources representative) who will post the job opening to career sites. Applicants can now view the opening and submit applications.
4. When a qualified applicant is identified and hired, the requisition is considered Filled, and has reached the end of its lifecycle.

As stated, you must create a requisition in order to post a job opening. However, some organizations want to be able to post jobs immediately without waiting for approval from managers. Therefore, the approval step mentioned above is **optional** - you can have your system configured to bypass the approval step for requisitions so your openings get out to the job boards faster.

For more information about the requisition workflow, please visit the topic on [Requisition Status](#).

Requisition Actions

Throughout the lifecycle of a requisition, numerous actions can be performed along the way. These include things like creating a requisition, approving a requisition, editing its data, reviewing requisition information, and other related items.

Here are some common actions that can be taken on a requisition:

- [Create a new requisition](#).
- [Copy an existing requisition](#).
- [Find an existing requisition in the system](#).
- [Delete a requisition](#).
- [Change the status of a requisition](#).
- [Edit the information associated with the requisition](#).
 - [Create a note for a requisition](#).
 - [Add a document to a requisition](#).
- [Review and approve a requisition](#).
- [Resend a requisition for approval](#).
- [Post a requisition as a job opening](#).
- [Print a requisition](#).

The Concept of Applicants

Applicants are potential employees of your organization. They have responded to job openings posted on career sites and submitted the necessary application information in hopes to fill your position.

Even if an applicant is not offered the position they originally applied for, their information will remain in Position Manager. This allows you to reassign applicants to other job openings.

Applicant vs. Applications

Throughout the system, you will notice a reference to both *Applicants* and *Applications*. These terms are somewhat interchangeable, but there are some differences.

-
- **Applicants** are people that respond to a job opening. They have a profile in Position Manager that contains information about their background and capabilities (a resume, basically).
 - **Applications** are what applicants submit for job openings. When applicants access your career site and apply for a job, they complete several forms and questionnaires for that specific job opening. The information they submit for a job is for that job only.

An applicant can submit many applications for different job openings you have posted. Position Manager provides various ways to quickly view all applications an applicant has submitted for different jobs.

Applicant Workflow

Just like a requisition, applicants have a basic workflow they undergo throughout the application process:

1. An applicant reviews a posted job opening and submits an application.
2. The application is reviewed by a recruiter to identify the candidates best suited for the opening.
3. Qualified applicants are sent to the hiring manager for review.
4. If approved, applicants then attend interviews, have their background and references checked, etc.
5. If all goes well, the applicant receives an offer for the job opening.
6. The applicant accepts the offer and is hired.

For more information about the applicant workflow, please visit the topic on [Applicant Status](#).

Applicant Actions

Throughout the lifecycle of an applicant, numerous actions can be performed along the way. These include things like reviewing an applicant, attaching documents, sending emails, and other related items.

Here is a list of common actions that can be taken on an applicant:

- [Locate an applicant](#).
- [Review an applicant](#).
- [Send an applicant to a manager](#).
- [Update the status of an applicant](#).
- [Reassign an applicant to another requisition](#).
- [Attach a document to an application](#).
- [Create a note for an applicant](#).
- [Send email to an applicant](#).
- [Hire an applicant](#).

User Roles

Permissions for users in Position Manager are controlled through the use of user roles. System permissions are assigned to roles, then users added to those roles. The added users inherit the permission set for that role.

Roles also help determine if users appear in certain selection lists for recruiters and hiring managers.

Users can belong to multiple roles in the system. When users are assigned to roles with conflicting permission sets, the least restrictive set of permissions is applied.

The main *User Roles* page provides a table view of roles in the system. From this table, you can view basic information and perform actions on multiple roles at once.

Clicking the link under the **Name** column will take you to the *User Role Detail* page for the selected item, where you can view and adjust permission sets for the role.

Membership for user roles is controlled from the *Users* page. You can add a user to a role from the main *Users* page, or from their individual user account.

The Concept of Permissions

Permissions for users in Position Manager are controlled through the use of [User Roles](#). System permissions are assigned to roles, then users added to those roles. The added users inherit the permission set for that role.

Roles also help determine if users appear in certain selection lists for Recruiters and Hiring Managers.

Permissions are based on your [organizational hierarchy](#), so it is recommended that you are familiar with this concept before continuing.

Expand the sections below in the order they appear to begin learning about User Roles and Permissions.

Roles

As mentioned, when a user is assigned to a role, they inherit the permission set defined for that role. When users are assigned to multiple roles with conflicting permission sets, the least restrictive set of permissions is applied.

There are several roles that are pre-defined in each Position Manager installation. These can be edited to change the permissions, and they can be copied to create custom roles.

Pre-defined Roles

Every Position Manager system includes pre-defined roles: **Recruiter**, **Hiring Manager**, **Requisition Approver**, **Onboarding Router**, **General**, and **Administrator**.

These roles come with a default set of permissions in the system, which can be customized to suit your organization's needs. The permission sets assigned to these roles was selected based on a historical analysis of how users typically interact with the Position Manager system.

It is not necessary to use these pre-defined roles; they are simply provided as a starting point for setting permissions for users of your system.

For details on the default permissions assigned to each role, [check out this topic](#).

Custom Roles

In addition to the pre-defined roles included with Position Manager, you can also create custom roles for your system if you have the need for a specialized set of permissions for users.

Custom roles are created by either copying an existing role, or creating a new one from scratch.

Associated System Roles

All roles in the system are associated with a System Role. These system roles determine if users in a role appear in the necessary selection lists for recruiters and hiring managers.

Example: You create a new role and associate it with the Recruiter system role. Users assigned to your new role will appear in Recruiter lists - like when you select a recruiter for a new requisition, or sending comments on an applicant to a recruiter.

There are several system roles to choose from: **Recruiter**, **Hiring Manager**, **Requisition Approver**, **Onboarding Router**, **General**, and **Administrator**.

Every role in Position Manager must be associated with a system role. When viewing the permission details for an existing role, you'll notice the page displays which system role it has been associated with. Also, when creating a new role, you are first asked which system role you want the new role to be associated with.

Permissions Table

Before getting too deep into permissions, let's look at how everything is laid out.

Take Action

Name: Hiring Manager Associated System Role: Hiring Manager

Administration Position Manager Reports

Job Postings | Applicant Management | Requisitions | Dashboard | Onboarding | Applicant Screening

Permission Name	Select All	Area of Responsibility	Position in Hierarchy	My Own	Custom Level
Job Postings	✓	✓	✓	✓	Please Select
Add	✗	✗	✗	✗	Please Select
Edit	✗	✗	✗	✗	Please Select
Delete	✗	✗	✗	✗	Please Select
Expire Posting	✗	✗	✗	✗	Please Select

Save Cancel

As you can see, this page provides three main tabs for permission sets in Position Manager:

- **Administration.** The Administration tab controls permission sets for system areas that reside under the **Admin** tab (items such as **Users**, **Questionnaires**, **Job** and **Communication Templates**, etc.).
- **Position Manager.** The Position Manager tab controls permissions for the Position Manager modules: **Requisitions**, **Job Postings**, **Applicant Management**, and **Dashboard**.
- **Reports.** The Reports tab controls permissions for viewing reports found on the **Reports** tab in Position Manager. The items listed refer to report groups, not individual reports.

Each tab contains links above the permissions table that further breaks down permission sets for the selected area.

The permissions on each tab are broken down into a table on the page. The left side of the table (the first column, titled "Permission Name") lists all the available permissions for the site, grouped by area.

The first row of the table, the header row, displays the three ways to activate a permission:

- **Area of Responsibility.** Refers to additional areas the user has been assigned responsibility within the organizational structure.
- **Position in Hierarchy.** Refers to where a user resides in the organizational structure.
- **My Own.** This option provides a way to assign permissions to users only if they are associated to a requisition/application in some way (such as a Recruiter or Hiring Manager); otherwise, they will not have access.

Note: The "My Own" column only appears when viewing permissions on the **Position Manager** tab on the User Role Detail page.

- **Custom Level.** This allows you to override the "Area of Responsibility" and "Position In Hierarchy" columns and assign a different level of permission access to the role.

The “Permission Name” column shows the available permissions under the selected area. The “Select All” column simply provides a quick and easy way to activate or deactivate the entire row at once.

Finally, the main part of the table shows you if the permission has been granted or not. Quite simply, a green check means you have that permission; a red X means you do not.

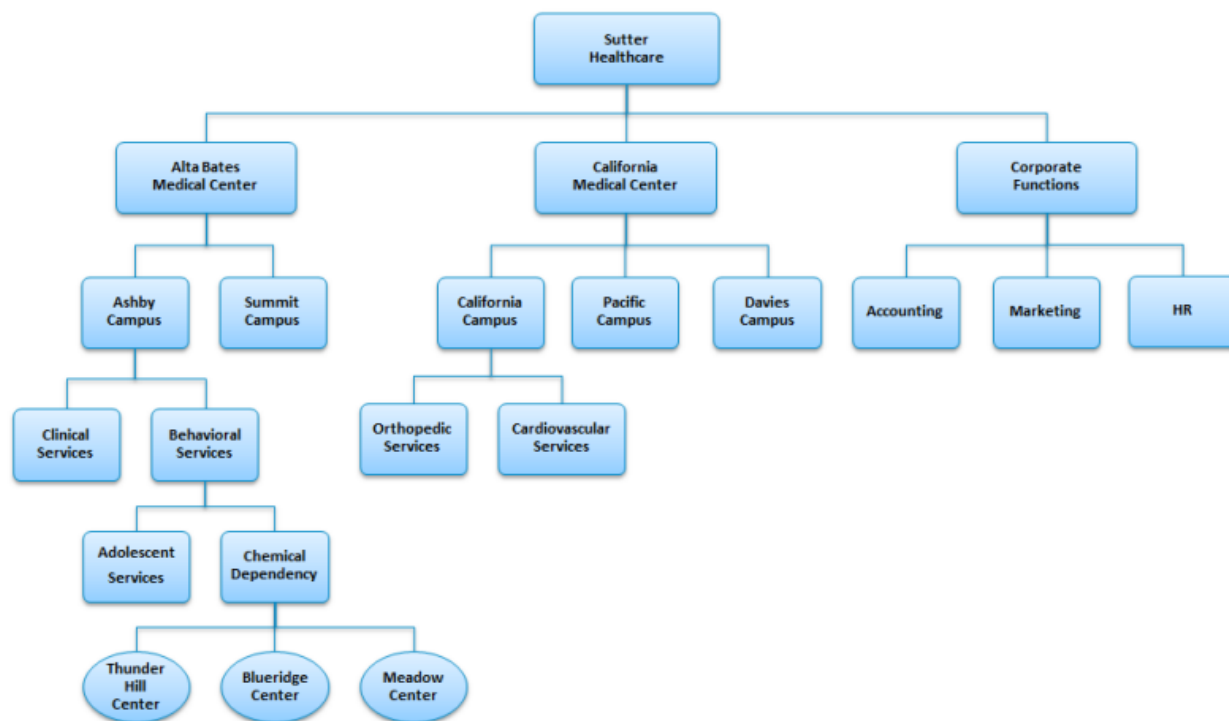
Assigning Permissions to a Role

Now that we have an understanding of how the permissions table is laid out, let’s look at how we would actually assign permissions to a role using the "Area of Responsibility" and "Position in Hierarchy" columns.

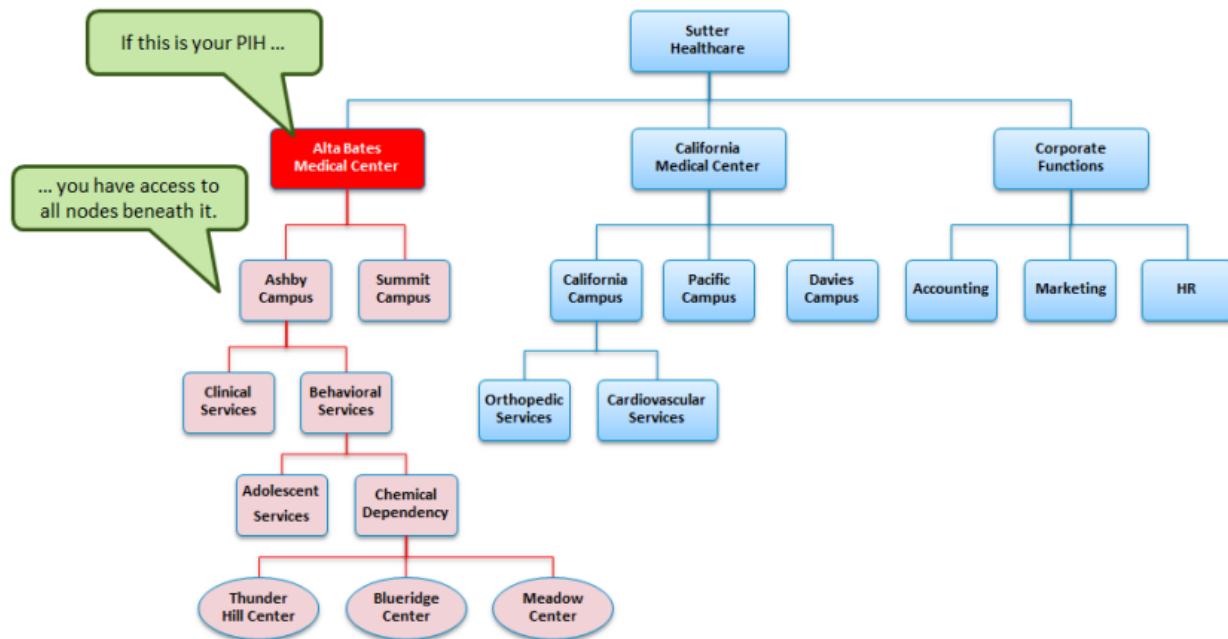
Position In Hierarchy

Since Position Manager manages all types of sensitive data for your entire organization, it is necessary to ensure you are able to precisely control user access to that data across the system. The key to achieving this type of granular permission functionality is Position in Hierarchy (PIH), or where a user resides within the organization.

It may be helpful to picture a standard organizational chart with all of the different departments and sub-sections that branch off as you go down the structure.



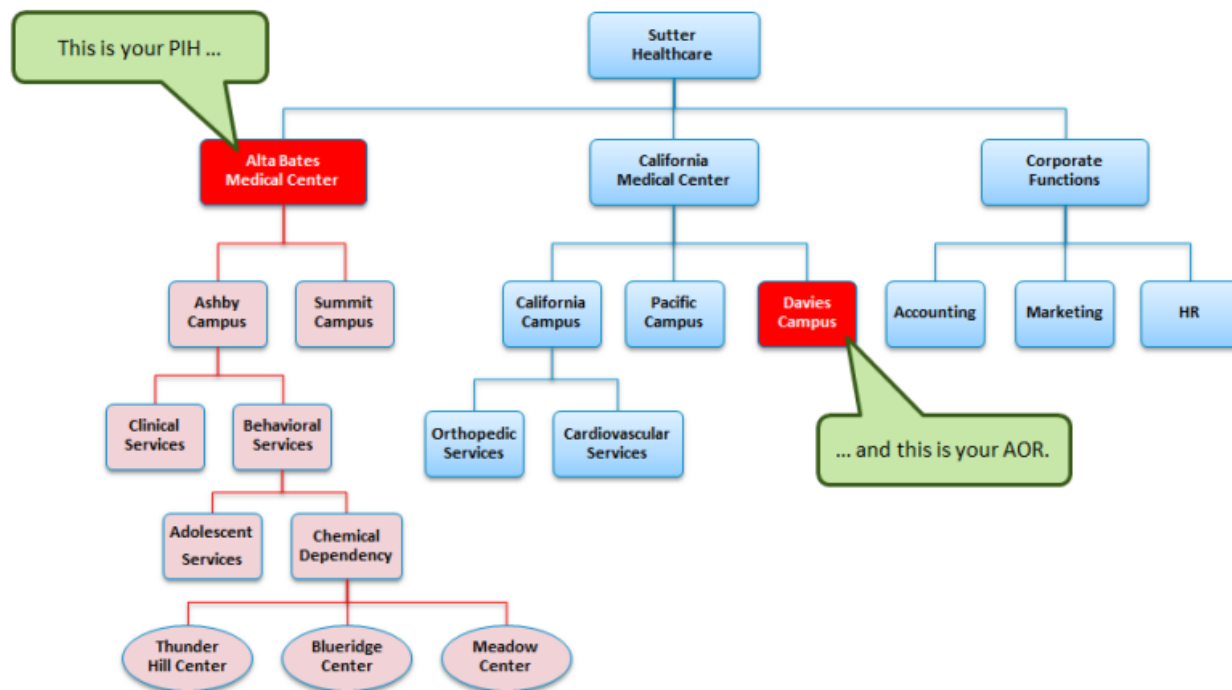
When a permission is activated in the PIH column, this means that a user is granted that permission for their position in the hierarchy, *as well as everything below that position*. So, you are granted that permission for everything up to and including the area you reside, but nothing above.



Area Of Responsibility

Area of Responsibility (AOR) is similar to PIH in that it refers to your organization's hierarchy structure. When the AOR column is activated for a permission in the table, a user in that role is granted that permission for whichever Areas of Responsibility is selected in their user profile.

In contrast to PIH, where you also receive that permission for everything below you in the hierarchy, AOR grants you the privilege *for the specific node indicated in your user profile's Area of Responsibility **only*** – it does not include areas beneath the indicated AOR.



So, in summary: PIH gives you permissions for your position plus everything beneath it, while AOR only gives permissions for the exact specified node in the structure – nothing above or below.

My Own

The “My Own” column provides a way for you to determine if a user should have a certain permission for everything within their Position in Hierarchy, or just those items they have been assigned to in some way (as a Recruiter or Hiring Manager, for example).

Under normal use, the “My Own” column would be activated only when the "PIH" column is **not** activated. This means that the user only has that permission for items they are assigned to, and cannot perform that action on other items even if it resides in their PIH.

Custom Level

Finally, we have the “Custom Level” column. The drop-down list in this column shows all the levels of your organizational hierarchy, and is used in special cases where you want to override the usual Position in Hierarchy for a role.

When you select an option from the **Custom Level** drop-down, it will take the place of the PIH option for that permission and grant the user rights up to the level indicated in the drop-down.

Example: A user resides at the Department level in their Position in Hierarchy, and has permissions to create requisitions up to that level. However, a system administrator selects the Global level from the Custom Level drop-down list for the role. Now that same user will have the ability to create a requisition at any level of the organization since the Custom Level selection overrides their Position in Hierarchy.

So, with the Custom Level option, you can assign permissions either above or below the level indicated by a user's Position in Hierarchy.

Warning: Use caution when adjusting permissions for a user role as it may have adverse effects on user access to the system. Please consult an HealthcareSource Support representative for assistance in any activities relating to permissions and user roles!

Applicant Management

The **Applicant Management** link under the **Position Manager** tab for a user role determines the actions a user can take on applicant they have access to.

But how do you determine which applicants a manager can access?

To answer this question, there are two options found above the permissions table for the **Applicant Management** area. These options determine if a manager can see all applicants that have applied to one of their requisitions, or if they only see those applicants the recruiter of the requisition specifically sends to them for review.

Administration | Position Manager | Reports

Dashboard | Job Postings | **Applicant Management** | Requisitions

Applicant Management: My Own

☒ View/Manage Applicants based on Requisitions I have access to.

☐ View/Manage Applicants that are sent to me.

PERMISSION NAME	SELECT ALL	AREA OF RESPONSIBILITY
Applicant Management	✓	▼

The options are defined as follows:

- **View/Manage Applicants based on Requisitions I have access to.** When this option is selected, managers are able to view all applicants that have applied to requisitions they have the ability to view. Managers do not have to be

granted special access to an applicant in order to view their information; if they applied to one of their requisitions, the manager can view their application.

- **View/Manage Applicants that are sent to me.** This is the more restrictive of the two options. When this is selected, managers have access to applicants only when a recruiter sends the application for their review. Unless a recruiter specifically requests their review of an application (using the [Send to Manager](#) feature), the manager will not be able to view the applicant's information, even if that manager has access to the requisition.

Why choose one option over another? The quick answer is to speed up the applicant review process by limiting the number of applicants a manager has access to.

If a manager only sees applicants that a recruiter sends over, there are fewer applications they must go through to find a qualified candidate.

However, since some organizations want their managers to have full access to applicants, we've provided the ability for managers to view every applicant that submits their information to a requisition.

The Concept of Messages and Tasks

The Messages and Tasks area, a table found on the *Applicant Detail* page, was introduced to Position Manager in the release of version 11. It was created to help streamline the processing of applicants.

The Messages and Tasks table serves two main purposes:

- Track communications between managers and recruiters regarding the selected applicant.
- Assign tasks to users when specific actions are needed, such as completing a custom form or setting up an interview.

Messages

Messages are simply emails sent regarding the selected applicant. They can be sent between managers and recruiters, or directly to the applicant.

The main purpose of the Messages and Tasks table is for recruiters to send applicants to managers for review, and for those managers to comment, or reply to the messages. This correspondence between the users is tracked and displayed in a threaded message format in the table.

Messages sent between managers and recruiters are also used to assign tasks to users, as described below.

The Messages table also shows emails sent directly to the applicant under the *Applicant Messages* view of the Messages and Tasks table.

For more about messages, [look here](#).

Tasks

Tasks are requests to a user of Position Manager to complete an action. Those actions can be to review an applicant's information, complete a custom form, set up an interview, etc.

When a task is assigned to a user, it appears in the Messages and Tasks table. Users can mark tasks assigned to them as complete, and some tasks will even automatically mark themselves as complete when the users performs the necessary actions (such as filling out a custom form).

Tasks can be viewed as simple reminders that another user has requested something from you. There is no penalty for not completing tasks; the processing of the applicant can continue with no problems if tasks are not completed.

Tasks are assigned to a user when a message is sent.

For more about tasks, [look here](#).

The Concept of Onboarding

Onboarding refers to tasks taken during the process of hiring an applicant. It specifically refers to providing forms and documents to the chosen applicant for completion and/or review, and tracking the status of those documents.

Onboarding in Position Manager

Onboarding in Position Manager consists of a series of tasks aimed at providing information to and collecting it from applicants that have been selected for hire for a position.

The basic onboarding process is as follows:

1. The applicant selected for hire is sent a group of documents and forms.
2. The applicant reviews the documents and completes the forms as necessary.
3. A Position Manager user, usually the Onboarding Manager, reviews the applicant's submitted forms for completeness and/or accuracy.

If the forms are not correctly completed, the manager rejects the forms and the applicant is notified that they must re-visit the forms.

4. Once the forms are correctly completed, the manager signs off, or approves, the forms. At this point, the applicant is considered hired and their workflow in the Position Manager system is closed.

Documents are assigned to an applicant within the Onboarding step of the New Hire wizard, or from the *Applicant Detail* page. Position Manager users review and reject/approve documents from the *Applicant Detail* page.

Onboarding for Applicants

As mentioned, there are onboarding tasks that the applicant themselves need to complete. This mainly refers to

reviewing and completing any documents and/or forms that are assigned to them from Position Manager. Once these documents are completed, users in Position Manager review the documents.

Once all the necessary document have been approved by the necessary Position Manager users, the onboarding process is complete.

The Concept of Screening

The applicant screening process is an attempt by an employer to hire not only the most qualified applicant for a position, but to have some knowledge of the applicant's background, which can reveal what type of behavior or attitude might be brought to the job position.

Screening in Position Manager refers to the collection and analysis of information relating to the applicant that goes above and beyond the usual data submitted for a job posting. Screenings assist with the evaluation of an applicant to determine if they are the right candidate for a particular opening at your organization.

Though most screening types are performed by third-party vendors, Position Manager is able to integrate with many vendors and manage the request and collection of screening data from within the Position Manager system.

Dashboard

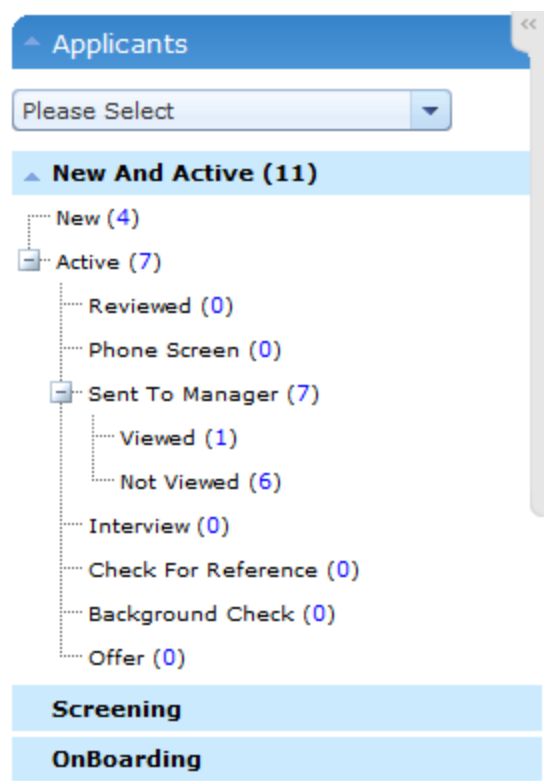
The *Dashboard* page in Position Manager is the starting point for accessing system information. It provides fast and easy access to the information you need to get your job done.

This area helps recruiters and managers quickly locate requisitions and applicants that require a review or some other action from the current user.

The page is divided into separate areas, each providing different pieces of information. These areas are described below.

Dashboard links

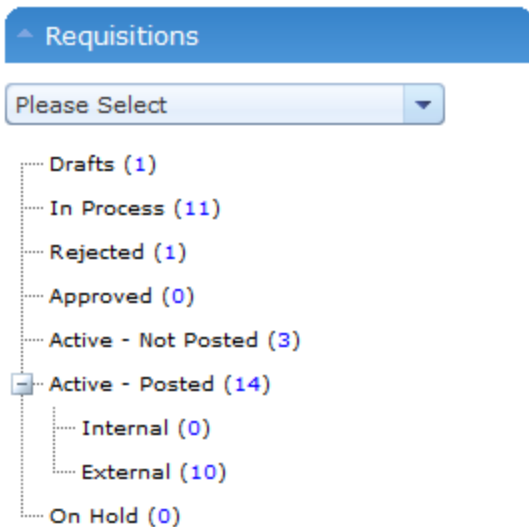
Along the left side of the dashboard are two sections of links to help users quickly locate and access information: *Applicants* and *Requisitions*.



- **Applicants.** The *Applicants* area on the dashboard is used for fast access to applicants. It is organized by applicant status, and shows how many applicants are in each status. Clicking the number link takes you to the *Applicants* page and automatically performs a search based on the selected status.

The list of available statuses and sections is determined by your individual user role.

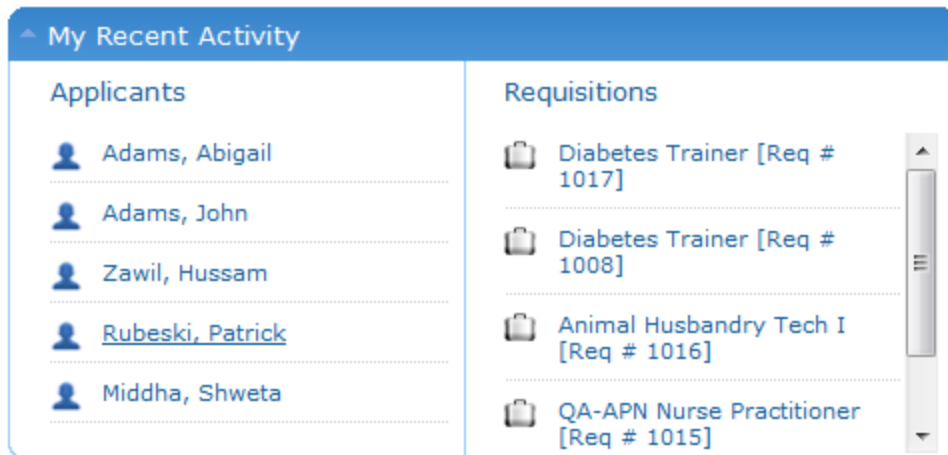
The drop-down list at the top of the area contains any saved searches created on the main *Applicants* page for quick reference. As with the number links, selecting an option from the drop-down list takes you to the *Applicants* page and automatically performs the selected search.



- **Requisitions.** Much like the *Applicants* area, *Requisitions* provides quick access to requisitions in the system. It is also organized by status, and clicking the number link for each status opens the *Requisitions* page with the selected search.

The available drop-down list contains any saved searches created on the main *Requisitions* page. Selecting an option from the drop-down list takes you to the *Requisitions* page and automatically performs the selected search.

My Recent Activity



My Recent Activity displays the five (5) most recent applicants and requisitions accessed. Clicking the links for any item opens the detail page for the selected item.

Announcements



Announcements is a place for system administrators to post important information to users of Position Manager. Clicking the link for an announcement opens a pop-up window with the full text of the message.

These messages can be configured to appear for only certain user roles, such as recruiters and managers. .

My Performance

The *My Performance* area displays graphs based on analytical information of the hiring process in Position Manager. Information displayed in this area applies only to the current user, and only includes data over the past 90 days.

The two available graphs display the **Average Days to Fill** for requisitions and an **Applicant Pipeline** for applicants that have applied to requisitions for the recruiter.

Role-based Dashboard views

The Dashboard offers role-based views for users. This means that users assigned to a certain role will have a different view of the Dashboard than users in other roles.

The areas of the Dashboard that are role-based are described below.

Applicants

The Applicants area of the Dashboard displays a list of applicant status and a link for each that automatically

launches a search based on the selected status. Each available user role displays a different set of statuses based on what the user role needs access to.

For the Recruiter role, there are three sections under the Applicants area:

- **New and Active.** Indicates all the applicants with a status of "New" and "Active", including any sub-groups of those statuses.
- **Screening.** Displays the number of screenings in each available status. This includes background checks, assessments, and reference checks.
- **New Hires.** This area shows the status of onboarding activities for applicants.

In addition to the status breakdown, the list displays those applicants in the "Sent to Manager" status that have been viewed and those that have not been viewed.

Announcements

Announcements have a setting that determines which user role the announcement appears for. Multiple user roles can be selected for each announcement.

Example: If an announcement is made visible to the Recruiter role only, a user assigned to the Hiring Manager role does not see the announcement on their Dashboard.

Requisition/Jobs

The *Requisition/Jobs* page in Position Manager is where you manage both job requisitions and job postings. This is where requisitions are created, edited, and routed through necessary approval cycles.

In order for a job to get posted for applicants, it must first be created and approved as a Requisition in Position Manager and routed through the necessary approval cycle.

Only after a requisition is approved by the assigned managerial personnel, determined by the selected approval workflow when the requisition was created, can it be posted as a job opening.

Position Manager allows the customizing of approver lists for requisitions, so approval workflows may differ for each client.

Note: Not all Position Manager systems utilize approvals for requisitions. In these cases, job postings are created immediately after completing a requisition.

Requisition Detail

The *Requisition Detail* page provides area to make necessary edits to requisition information, view attached notes and documents, and view revision and change history for the selected item.

Accounting Director [Req # 1701] Status: Active - Posted

Take Action

Requisition Information

Req Details | Job Postings | Attached Documents | History Detail | Applicants

Standard Information

Requisition Number: 1701
Hiring Manager: Amanager, Heather
Recruiter: Arecruiter, Heather
Internal ID: 605

Position Title: Accounting Director (74-S)
Organization: Michigan Athletic Club/ADMINISTRATION - EXEC
Created Date: 6/16/2016

Requisition Details

Save Cancel

Notes

Modified Date Modified By Note

There were no matches for your search criteria. Please search again.

Page 1 of 0

Displaying items 0 - 0 of 0

Date	Action	User
6/16/2016	Created	Support, HCS
6/16/2016	Approved	Support, HCS
6/16/2016	Approval Complete	Support, HCS
6/16/2016	Active Posted	Support, HCS

Last Modified by Support, HCS on 6/16/2016

The *Requisition Detail* page displays the full overview and history of the selected requisition. Several informational tabs are used:

- Req Details.** The **Req Details** tab lists the current details of the requisition. The information on this tab is contained in two collapsible areas: Standard information and Requisition Details. The fields displayed in the Requisition Details area are customized based on your organization's requisition form.

-
- **Job Postings.** The **Job Postings** tab lists any internal and external career sites where the approved requisition has been posted as an open job, along with basic information about when it was posted and which user posted the job. Details about the job posting itself are also found under the list of postings.

Note: The job posting table only lists postings that are related to the Position Manager system. If a site is used that is not linked to Position Manager, it does not appear in the list.

- **Attached Documents.** The **Attached Documents** tab provides access to documents attached to the requisition.

Note: Attaching documents to a requisition is a system-wide setting in Position Manager controlled in the **Admin** area. Your system may not be configured to accept document attachments; therefore, this tab may not appear.

- **History Detail.** The **History Detail** tab contains a full change history of the requisition, from creation to its current state.
- **Applicants.** The **Applicants** tab provides a tabled list of all applicants that have submitted an application for the requisition. Clicking on an applicant's name from this list opens the *Applicant Detail* page.

In addition to these informational tabs, a **Notes** section is available under the tabbed section of the page where you can view and add notes about the requisition.

A **Requisition Workflow History** table is shown to the right of the tabbed area. This table shows the date of the action, what was done to the requisition, and the user that performed the action. There is also a note icon that displays any notes added when the action took place. The name of the last user to update the requisition and the date the action was taken are listed below the table.

Managing Requisitions

The *Requisitions* page is where you can manage existing and add new requisitions in the Position Manager system. This page provides a table view of requisitions in the system. From this table, you can view basic information and perform actions on multiple requisitions at once.

The screenshot shows the HCS IRIS Client interface for Requisitions/Jobs. On the left is a search panel with various filters. The main area contains a table of requisitions. The table has columns: Req #, Position Title, Job Code, Req Status, Job Category, and Organization. The table is sorted by Req # and shows 9 items. The bottom of the page displays pagination information: Page 1 of 1, displaying items 1 - 9 of 9.

Req #	Position Title	Job Code	Req Status	Job Category	Organization
1009	APN Nurse Practitioner	ANP-2011	Filled	Clinical Professional	Emergency
1011	APN Nurse Practitioner	ANP-2011	Draft	Clinical Professional	Emergency
1012	APN Nurse Practitioner	ANP-2011	Draft	Clinical Professional	Emergency
1017	APN Nurse Practitioner	ANP-2011	Draft	Clinical Professional	Emergency
1032	APN Nurse Practitioner	ANP-2011	Draft	Clinical Professional	Emergency
1148	APN Nurse Practitioner	ANP-2011	Active - Not Posted	Clinical Professional	Emergency
1205	Associate Nurse Practitioner	3142014	Active - Posted	Support Services	Neurology
1209	Associate Nurse Practitioner	3142014	In Process	Support Services	Section A
1102	Associate Nurse Practitioner	3142014	Filled	Support Services	Surgical

The Requisitions table can be filtered using the **Search** panel to the left of the page. When you first visit the *Requisitions* page, the system uses a default search for requisitions in a status of "Draft", "In Process", "Approved", "Active - Not Posted", "Active - Posted", and "On Hold".

There is also a **Recent Requisitions** area under the panel that provides a list of recently accessed requisitions.

The main table can be sorted by clicking on any of the available column headings.

Clicking the link under the "Position Title" column will take you to the [Requisition Detail](#) page for the selected item.

Approving a Requisition

After a requisition is created in Position Manager, it must be approved before it is posted to job sites for potential applicants.

Requisition approvers receive an email notification about each requisition that requires their approval. The link takes the user to the login page for Position Manager. Upon successful login, they are then taken to the *Requisition Detail* page where they can complete the approval process.

Requisition Approval Request - Req. # 1100, Clinical Nurse Specialist.

Position Manager <tms@healthcaresource.com>

Sent: Thu 8/25/2011 2:39 PM

To: Derek Trickett; Jay Sandora

A new requisition has been sent for your approval:

Req. # 1100, Clinical Nurse Specialist.

[Click here](#) to view the requisition

*This is a system generated email, please do not reply.

Tip: If a user has misplaced an approval email, you can [resend a requisition approval](#) email at any time.

Users can also access requisitions that require approval directly from Position Manager without using the email link by searching for an opening a requisition from the main *Requisitions* page.

Note: You can view comments made by other approvers of the requisition by clicking the Note icon next to the entry in the **Requisition Workflow History** area of the *Requisition Details* page.

The screenshot shows the 'Requisition Workflow History' table. A callout points to a 'Note' icon (a notepad with a pencil) in the 'ACTION' column for the entry '4/10/2012 Approved Lynch, Tim'. Another callout points to the 'Note' icon in the 'ACTION' column for the entry '4/10/2012 Approved Lynch, Tim' in a second, overlapping table view. A third callout points to the 'Comment' box in the 'Requisition Workflow History' table, which contains the text: 'Should consider mentioning in posted job that shift schedule can be expanded after probationary period.'

DATE	ACTION	USER
4/10/2012	Created	Rubeski, Patrick
4/10/2012	Approved	Rubeski, Patrick
4/10/2012	Sent To	Lynch, Tim
4/10/2012	Approved	Lynch, Tim
4/10/2012	Sent To	Sandora, Jay

Last Modified by Rubeski, Patrick
4/10/2012.

DATE	ACTION	USER
4/10/2012	Created	Rubeski, Patrick
4/10/2012	Approved	Rubeski, Patrick
4/10/2012	Sent To	Lynch, Tim
4/10/2012	Approved	Lynch, Tim
4/10/2012	Sent To	Sandora, Jay

Comment

Should consider mentioning in posted job that shift schedule can be expanded after probationary period.

The steps below assume you have already reached the *Requisition Detail* page for the requisition you need to review, whether you used the email link or just searched for the requisition in the system.

Basic Required Data

Requisition Number	1100	Position Title	Clinical Nurse Specialist
Hiring Manager	Services, Professional	Organization	Boston Health Group
Recruiter	Beckstrom, Karin		

Requisition Details

Reason for opening

Replacement for?

Schedule/Hours:

Schedule	Evenings	Hours/Pay Period
Shift	Nights	FTE
Hours	50	

Pay/Compensation:

Pay Grade	Pay Grade 10	Sign on Bonus
Salary	\$30.01-\$35.00	Referral Bonus

Requirements:

Education	Masters Degree	License/ Certification
Experience		

Job Summary

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam et malesuada ante. Aliquam egestas posuere tincidunt. Duis imperdiet viverra arcu, a auctor odio ullamcorper quis. Morbi a erat vitae lorem elementum suscipit nec vitae massa. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Maecenas eu nibh sed nunc vestibulum auctor at a odio. Nam nulla

Attachments

Approvals

Action

☒ Approve
 ☐ Decline

Approval Complete

☐

Comment

Ready for posting. Make sure to leave as Internal Only for a week before hitting external sites, please.

Select Next To Approve

- On the *Requisition Detail* page, review the information for the requisition.
- In the **Approvals** area, select if you wish to *Approve* or *Reject* the requisition.
- Check the **Approval Complete** box if no further approvals are required for the requisition.

Note: If you check the **Approval Complete** box, the requisition approval process is complete and the requisition is sent to the Recruiter for posting. You will not be able to make a selection in the **Select Next to Approve** field.

- If necessary, type in additional **Comments**.
- If you did not check the **Approval Complete** box, you must choose a user in the **Select Next to Approve** field.
- Click the **Submit** button.

Clicking the **Submit** button reloads the page, and a message is displayed stating the requisition has been approved.

If you checked the **Approval Complete** box, the requisition is sent to the Recruiter for posting. The requisition status is updated to "Approved".

If you did not check the **Approval Complete** box, the requisition is sent to the user selected in the **Select Next to Approve** field for approval. The requisition remains in the "In Process" status.

If you chose to *Reject* the requisition, the requisition is sent back to the creator for revisions. The requisition status is updated to "Rejected".

Creating a Requisition

Before a new job can be posted for applicants, it must first be entered into Position Manager as a requisition.

There are two ways to create a new requisition in Position Manager: start from scratch, or copy an existing requisition. This topic covers the process for creating a new requisition from scratch.

[You can view instructions for copying an existing requisition here.](#)

Position Manager provides an easy-to-use wizard that walks you through the requisition creation process.

To get started, click the **Add Requisition** button on the main *Requisitions* page. The requisition creation wizard launches and displays the first step of the process, **Select Organization**.

Note: Depending on available permissions for a user and overall system settings, not all of the steps shown here may be available.

1. **Select Organization.** In this step, you select the specific area of your organizational structure where the opening resides. Your selection here determines which job templates are available in the next step.

Select Organization details

Add Requisition

Select Organization

Select Template

Enter Req Details

Submit for Approval

Post Job

Where do you want to open this position?

Find Next

Selections may be limited due to your permissions

- HCS IRIS Client - Global
 - Austin Hospital Group (Code)
 - Boston Health Group (Code)
 - Boston Clinic (Code)
 - Boston Hospital (Code)
 - Emergency (Code)
 - Chicago Medical Centers (Code)
 - Las Vegas Hospital Group (Code)
 - Los Angeles Care Inc (Code)
 - QA Account-4000
 - QA Account-5000
 - QA Account-6000
 - RI - Hasbro

Cancel

Next

- Check the box next to the entity in your organizational hierarchy for the new requisition. You can either browse the tree structure or perform a search by entering part of an Organization Name or Code into the text field and clicking the Find button.

Note: The system checks an organization for you by default, but you can change the selection as needed. The default selection is based on the position in hierarchy noted in your user profile; or, if you are a recruiter, the areas of responsibility in your profile.

- Click **Next** to advance to the next step of the process.
- Select Template.** This determines the specific job for your opening. The template you select here will pre-populate the Requisition Detail form in the next step.

Select Template details

Add Requisition

Select Organization

Select Template

Enter Req Details

Submit for Approval

Post Job

Select the Job Template for this Requisition

Job Code: Position Title:

Job Category:

Job Code	Position Title	Category	Organization
<input checked="" type="checkbox"/> AHT-2011	Animal Husbandry Tech I	Support Services	Emergency
<input type="checkbox"/> ANP-2011	APN Nurse Practitioner	Clinical Professional	Emergency
<input type="checkbox"/> ANM-2011	Assistant Nurse Manager	Support Services	Emergency
<input type="checkbox"/>	Both Pre-Qual and Ranking Questionnaire	Clinical Professional	Emergency
<input type="checkbox"/> COA-2011	Certified Ophthalmic Assistant	Clinical Professional	Emergency
<input type="checkbox"/> Med108-2010	Charge Nurse	Clinical Professional	Emergency
<input type="checkbox"/>	Check box Ranking Questionnaire	Administrative Support	Emergency
<input type="checkbox"/> CET-2011	Clin Eng Tech II	Clinical Professional	Emergency

Page 1 of 3

Displaying items 1 - 25 of 55

- Check the box next to the job template you wish to use for the new requisition. You can either browse the list of available templates or perform a search by entering a Job Code or Position Title into the text fields and clicking the Search button.

Note: If there are no job templates available to select, you do not have the necessary permissions to create a requisition in the selected area of your organization. You can return to the previous step and select a different organization, or contact your system administrator to verify your permissions.

- Click **Next** to advance to the next step of the process.
- Enter Req Details.** This is where the details of the opening are entered. These forms are customizable and will vary from client to client.

Enter Req Details details

Add Requisition

Select Organization

Select Template

Enter Req Details

Submit for Approval

Post Job

Boston Hospital/Emergency

Enter Requisition Details

Standard Information

Requisition Number

1021

Position Title

Certified Ophthalmic Assistant

Hiring Manager

HiringManager, QA

Organization

Boston Hospital/Emergency

Recruiter

Recruiter, QA

Created Date

8/8/2012

Requisition Details

Reason for opening

☒ New Position
 ☐ QA-New Position
 ☐ Replacement
 ☐ QA-Replacement
 ☐ Temporary
 ☐ QA-Temporary

Replacement for?

Schedule/Hours:

Schedule

QA-Full Time

Hours/Pay Period

Shift

Days

FTE

Hours

40

Pay/Compensation:

Pay Grade

QA-Pay Grade 5

Sign on Bonus

Salary

\$35.01-\$40.00

Referral Bonus

Requirements:

Education

QA-Masters Deg...

License/ Certification

Select options

Experience

QA-2-3 years

Job Summary

Source

Styles

Format

Font

Size

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam et massa euismod ante, aliquam egestas posuere ante. Duis imperdiet viverra arcu. Auctor odio ullamcorper quis. Morbi a erat vitae lorem elementum suscipit nec vitae massa. Class aptent tacit sociosqu ad litora torquent per conubia nostra per inceptos humenaeos. Maecenas eu nibh sed nunc vestibulum auctor ad a odio. Nam nulla risus ultricies sit amet vehicula nec. Suspendisse euismod. Duis nulla nibh tellus, volutpat eu nunc a, tincidunt ad lorem. Duis nulla nibh tellus, volutpat eu nunc a, tincidunt ad lorem. Duis nulla nibh tellus, volutpat eu nunc a, tincidunt ad lorem.

Characters: 1131

Documents

You can attach up to 3 documents to this requisition. Note, the maximum file size is 5MB per file.

Acceptable file formats: .doc,.docx,.pdf,.htm,.html,.rtf,.txt,.xls,.xlsx,.ppt,.pptx,.jpg,.jpeg,.bmp,.png,.img,.tif

Upload Document

HCS_TestDocument.docx

Previous

Cancel

Save as Draft

Save and Continue

In the Standard Information section:

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-
- a. Type in a Requisition Number.

Note: The Requisition Number field may appear as a read-only field. This occurs when your Position Manager system is set up to automatically generate this number.

- b. Select a Hiring Manager.

Note: This field may be filled in by default depending on your system settings.

- Click the **Search** icon next to the **Hiring Manager** field.
- From the *User Lookup* pop-up window, select the check box next to the name you want to assign to the Hiring Manager role for the requisition.
- Click the **OK** button.

- c. Select a Recruiter.

Note: This field may be filled in by default.

- Click the **Search** icon next to the **Recruiter** field.
- From the *User Lookup* pop-up window, select the check box next to the name you want to assign to the Recruiter role for the requisition.
- Click the **OK** button.

In the Requisition Details section:

- a. Enter data into the available fields in this section.

Note: Requisition forms are customizable, so the list of available fields in this section will vary from client to client. These fields are set based on the data your organization requires for requisition requests.

In the Documents section:

- a. Click the **Attach Documents** button. This allows you to browse your computer and upload a reference file to the new requisition.

Note: Your Requisition Details form may not include a Documents section. This is an option and is not automatically included in all Position Manager systems.

Once you have completed the *Requisition Details* form, you have several options as to how to proceed. Your system settings determine which buttons are available and what each does.

Button options

- **Next.** If you have a **Next** button, clicking this takes you to the next step in the process. At this point, a requisition record is created in the system and given a status of “Draft”.
 - **Finish.** If you see a **Finish** button, clicking this completes your portion of the requisition process. The new requisition is created and set to a status of “Active”. The requisition is sent to the user responsible for posting it as a job.
 - **Submit and Continue.** A **Submit and Continue** button creates the requisition, sets its status as “Approved”, and takes you to the next step.
 - **Previous.** Clicking the **Previous** button takes you back to the **Select Template** step. You lose any data you entered on the *Requisition Detail* form if you click **Previous**.
 - **Cancel.** Clicking the **Cancel** button stops the requisition creation process. The wizard window closes, all entered data is lost and no requisition record is created.
 - **Save as Draft.** The **Save as Draft** button saves all information entered so far, creates a new requisition record in the system, places it in a “Draft” status, and closes the wizard. You can re-open the requisition from the main *Requisitions* page and continue the process at any time.
4. **Pre-Qual Questions.** This step allows the selection and editing of a pre-qualification questionnaire for the requisition. An existing questionnaire can be used, and edits can be made to the questionnaire if necessary.

Pre-Qual Questions details

Add Requisition

Select Organization

Select Template

Enter Req Details

Pre-Qual Questions

Ranking Questions

Submit for Approval

Post Job

Pre-Qualification Questions

Pre-Qualification Questionnaire

PreQualQuestionnaire

Instructional Text

Pre-Qualification Questionnaire Instructions

+ View Job Summary

+ Add

✖ Remove

▲ Move Up

▼ Move Down

Add Suggestions ⓘ

<input type="checkbox"/>	Seq #	Question Text	Answer Type
<input type="checkbox"/>	1	Question1	Radio Buttons
<input type="checkbox"/>	2	Question2	Radio Buttons

To change the order of questions, highlight a row from the list and click the **Move Up** or **Move Down** button.

Rejection Message

Rejection Message:

Default Prequalification Message

Preview:

Thank you for your interest in {{Requisition:PositionTitle}} but you did not meet the minimum qualifications for this position. {{Client Name}} welcomes you to apply to our other open positions that you are interested in and qualified for.

Questionnaire Save Options

☐ Save your changes for this posting only
 ☐ Save your changes as a new questionnaire template

Name:

Display Name:

Discard Changes

Cancel

Previous

Next

- Select a questionnaire from the **Pre-Qual Questionnaire** drop-down menu. The questions associated with the questionnaire are loaded into the table.
- Click **Add Suggestions** to add any recommended pre-qualification questions associated with fields contained in the requisition.
- Make any necessary edits to the questionnaire.
- In the **Save Options** section, select if you wish to save any changes made to the questionnaire to the selected questionnaire template, or if changes should only be applied to the current requisition.
- Click **Next** to advance to the next step of the process.

- Ranking Questions.** Similar to the previous step, this allows the inclusion and editing of a ranking questionnaire for the requisition.

Ranking Questions details

Seq #	Question Text	Answer Type	Weight	Score %
1	QuestionA	Radio Buttons	1	50.00 %
2	QuestionB	Check Boxes	1	50.00 %
3	QuestionC	Text Field	1	0.00 %
4	QuestionD	Text Area	0	0.00 %

- a. Select a questionnaire from the **Ranking Questionnaire** drop-down menu. The questions associated with the questionnaire are loaded into the table.
 - b. Make any necessary edits to the questionnaire.
 - c. In the **Save Options** section, select if you wish to save any changes made to the questionnaire to the selected questionnaire template, or if changes should only be applied to the current requisition.
 - d. Click **Next** to advance to the next step of the process.
6. **Submit for Approval** (*option*). In this step, you determine who needs to review and approve the requisition before it can be posted to job boards.

Submit for Approval details

Note: The **Submit for Approval** step only appears if your system is configured to use approvals; otherwise, you may be able to move directly to the **Post Job** step in the wizard.

- a. Check the **Approve** option if you wish to mark the requisition as approved.
- b. Check the **Approval Complete** option if no other user needs to review the requisition before posting it as a job.

Note: The **Approval Complete** option is available only if you have the [self approval permission](#).

- c. Type in any **Comments** regarding the requisition.
- d. Determine which user needs to review the requisition in the **Select Next to Approve** field.
 - Click the **Search** icon next to the field.
 - From the *User Lookup* pop-up window, select the check box next to the name you want to assign to the Hiring Manager role for the requisition.
 - Click the **OK** button.
- e. **Previous, Cancel and Next**

Just as with the previous step of the wizard (**Enter Req Details**), your system configuration determines which button is available to continue the process.

- **Finish.** If you see a **Finish** button, you do not have the ability to post the requisition as a job. Clicking **Finish** saves the requisition in a state of "In Process" and sends the requisition to the selected user for approval. Once it is approved by necessary users, it can be posted as a job by a user with the proper permissions.
- **Next.** A **Next** button means you have the necessary permissions to post the requisition as a job. Clicking **Next** takes you to the final step in the requisition creation wizard.

There are other options available if you wish to make changes to information you have entered to this point.

-
- **Previous.** Clicking the **Previous** button takes you back to the **Enter Req Details** step. You will lose any data you entered on the **Submit for Approval** step if you click **Previous**.
 - **Cancel.** Clicking the **Cancel** button stops the requisition creation process. The wizard window closes and your requisition is saved to a "Draft" status. Any data entered on the **Submit for Approval** step is lost.

7. **Post Job** (*option*). The final step in the requisition creation workflow involves posting the job to available job boards. After this step, you can begin collecting applications.

Post Job details

Add Requisition

HCS [RIS Client - Global/Boston Health Group/Boston Hospital/Emergency]

Job Posting Form for Requisition : Certified Ophthalmic Assistant [Req # 1021]

Career Site

Start Date

8/8/2012

End Date

9/30/2012

Internal Only

☒

For:

5

days

Featured Job

☐

Posting Created: 8/8/2012

Screening

Pre-Qualification Questionnaire

QA Prequalification

Preview

Pre-Qualification Disqualification Message

Default Prequalification Message

Preview

Ranking Questionnaire

QA Ranking Questionnaire

Preview

Global Questions

☒ Yes ☐ No

Assessments

Posting Information

Job Category

QA-Clinical Professional

Job Posting Display Title

Certified Ophthalmic Assistant

Job Summary

Source

B
I
U
X
Y

Styles

Format

Font

Size

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam et malesuada ante. Aliquam egestas posuere tincidunt. Duis imperdiet viverra arcu, a auctor odio ullamcorper quis. Morbi a erat vitae lorem elementum suscipit nec vitae massa. Class aptent tacit sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Maecenas eu nibh sed neque vestibulum auctor at a odio. Nam nulla risus, ultricies sit amet vehicula nec, auctor eu metus.

body

Characters: 1131

Facility Description/Information

Source

B
I
U
X
Y

Styles

Format

Font

Size

Characters: 0

☐ Display Facility Description/Information

Display Contact Information

☒ Yes ☐ No

Contact

Recruiter, QA

Display Contact Name

☒ Yes ☐ No

Display Contact Address

☐ Yes ☒ No

Display Email Address

☒ Yes ☐ No

Display Phone Number

☒ Yes ☐ No

Display Fax Number

☐ Yes ☒ No

Job Distribution

☒ jobs.healthcaresource.com

Previous

Cancel

Save as Draft

Post Job

[Click here to view more information on Posting a Job, which is covered in a separate topic.](#)

Requisition Notes

Position Manager allows users to create notes for a requisition in the system. Notes are visible on the *Requisition Detail* page for a specific requisition for users to view.

Notes are added to a requisition from the *Requisition Detail* page.

Creating a Note for a Requisition

Notes can be created for a requisition for reference purposes. There is no limit to the number of notes that can be added to requisitions.

These steps are taken from the *Requisition Detail* page.

1. Select the **Create Note** option from the **Take Action** drop-down list.
2. In the *Create Note* pop-up window, type in the text of the note you want to create for the requisition.
3. Click the **Save** button.

The page reloads after the **Save** button is clicked and a message displays that states the note has been successfully created for the requisition. The note appears in the Notes table for the requisition.

Deleting a Note from a Requisition

Notes that have been added to a requisition can be deleted. Deleted notes can not be recovered.

These steps are taken from the *Requisition Detail* page.

1. In the Notes table, check the box next to the note(s) you wish you delete.
2. Select the **Delete Note** option from the **Take Action** drop-down list. A confirmation dialog will open asking if you are sure you wish to delete the selected note(s).
3. Click the **OK** button.

Clicking the **OK** button deletes the selected notes from the requisition. The *Requisition Detail* page reloads and displays a message stating the selected note(s) were successfully deleted.

Requisition Documents

Position Manager allows users to upload documents from their local computer (or local network) to a requisition for reference purposes. Uploaded documents are visible on the *Requisition Detail* page for the selected requisition, where users can then download to view the attached documents.

Documents can be uploaded to a requisition from within the requisition creation wizard during the creation process, or at any time from the main *Requisitions* and the *Requisition Detail* pages.

Attachments are limited to these file types: .doc, .docx, .pdf, .htm, .html, .rtf, .txt, .xls, .xlsx, .ppt, .pptx, .jpg, .jpeg, .bmp, .png, .img, .tif

There is a limit to the size of files you can attach to a requisition. The allowable file size is configurable, so please check with your system administrator to determine your site's limits.

Note: The ability to attach documents to a requisition is a system setting. Your Position Manager system may not be configured to allow requisition document uploads.

Attaching a Document to a Requisition

Documents can be added to a requisition for reference purposes.

Note: Attachments are limited to these file types: .doc, .docx, .pdf, .htm, .html, .rtf, .txt, .xls, .xlsx, .ppt, .pptx, .jpg, .jpeg, .bmp, .png, .img, .tif

Note: There is a limit to the size of files you can attach to a requisition. The allowable file size is configurable, so please check with your system administrator to determine your site's limits.

These steps are conducted on the *Requisition Detail* page. This action can also be carried out from the main *Requisitions* page as a batch action.

1. Select the *Attach a Document* option from the **Take Action** drop-down list.
2. In the *Select a document to attach* pop-up window, click the **Browse** button and select the file to attach to the requisition.
3. Click the **OK** button.

The page reloads after the **OK** button is clicked. A message displays that states the document has been successfully attached to the requisition(s).

The uploaded document now appears in the Documents table on the *Requisition Detail* page for the selected requisition(s).

Deleting a Document on a Requisition

Documents that have been attached to a requisition can be deleted. Deleted documents can not be recovered; you will need to re-attach them to the requisition from their original source.

These steps are conducted on the *Requisition Detail* page.

-
1. Click on the **Documents** tab.
 2. Check the box next to the document(s) in the table you wish to delete.
 3. Select the **Delete Documents** option from the **Take Action** drop-down list. A confirmation dialog will open asking if you are sure you wish to delete the selected document(s).
 4. Click the **OK** button.

Clicking the **OK** button deletes the selected documents from the requisition. The *Requisition Detail* page reloads and displays a message stating the selected document(s) were successfully deleted.

Searching for Requisitions

A standard search feature is provided on the main *Requisitions* page to provide quick access to records that need to be reviewed and/or updated.

Tip: Several fields in the search area use look-up windows for making selections (as opposed to drop-down lists). To use these lookups, click the **Search** icon next to the field and either search for an entry or browse the available options to make selections.

1. From the main *Requisitions* page, locate the **Search** area in the column on the left of the page.

The screenshot shows the HCS IRIS Client interface for Requisitions/Jobs. On the left, there is a search sidebar with a 'Search' section containing 'Saved Searches' and 'Quick Search' buttons. Below this is an 'Advanced Search' section with various filters: Date Type (Posted), Date Range (No date range), Job Category (All), Organization (text input), Requisition Status (Draft; In Process; Approved), Posting Status (All), and a checkbox for 'Featured Job'. There are also fields for Recruiter, Hiring Manager, and Approver, each with a search icon. At the bottom of the sidebar are 'SEARCH', 'CLEAR', and 'save this search' buttons. The main area displays a table of requisitions with columns: Req #, Position Title, Job Code, Req Status, Job Category, and Organization. The table shows 39 items, with the first 25 displayed. The bottom of the page shows pagination: Page 1 of 2, displaying items 1 - 25 of 39.

2. Using the available search fields, select values for the criteria you wish to search against. You can use one or more of the fields for your search.
3. When all necessary criteria has been entered, click the **Search** button.

The Requisitions table reloads to display those results that match the criteria used for the search.

Tip: If this search is one you will run frequently, you can [save the search](#) for quick reference for future searches.

Alternate Search Methods

The **Search** panel on the *Requisitions* page also provides access to any **Saved Searches** you may have. Select the desired search from the drop-down list and click the **Go** button to run the saved search.

The **Quick Search** field above the standard search options is another way to conduct a search. Enter any text in here and the system will search all available requisition fields for a match.

Finally, you can select from a list of recently accessed requisitions that are displayed at the bottom of the search panel. Clicking one of these links will open the *Requisition Detail* page.

Requisitions Quick Search

The Search area on the *Requisitions* page provides a quick way to search against many fields at once when attempting to locate a requisition.

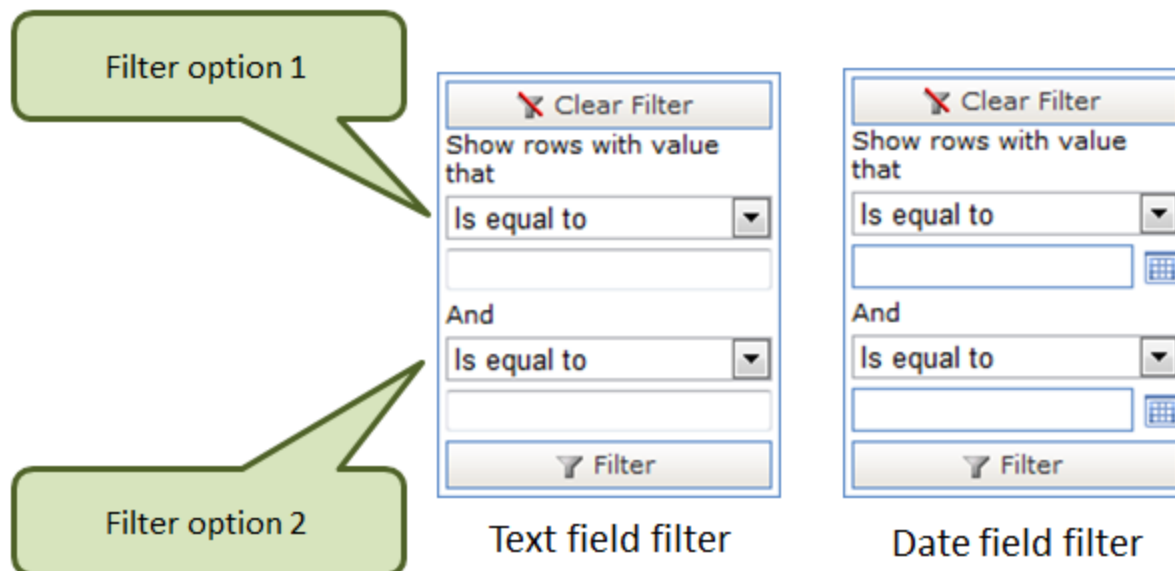
When using the **Quick Search** feature on the *Requisitions* page, the following fields are searched:

- Requisition Number
- Position Title
- Job Code
- Job Posting Title
- HRIS ID

Table Filters

The search results table on both the *Requisitions* and *Applicants* pages offer a filter feature that allow you to further refine search results.


Columns that can be used to filter results contain a small icon () indicating a filter is available. Clicking this icon displays a drop-down with the filter options.



The table filters allow you to filter against two sets of criteria in each column. This is why the filter contains two drop-down lists and text/date fields. When options are chosen in each filter option for a column, the system only returns results that match **both** of the filter criteria used.

When filtering on a date column, the two filter options allow you to set a date range to filter against (i.e. anything on or after *Date X* and before or on *Date Y*).

Using the available filters is a matter of setting the criteria you wish to filter against. Though the process is the same, you'll notice that there is a small difference when filtering on text fields versus date fields.

1. Click the filter icon () in the table column you wish to filter on. The filter drop-down appears.
2. Select a filter option from the first drop-down list.
3. Enter the information to use as the filter in the text/date field.
4. Click the **Filter** button.

Clicking the **Filter** button reloads the page and displays the filtered results in the table.

More about requisitions

Changing the Status of a Requisition

As a requisition moves through the Position Manager system, its status is updated to reflect its position in the process. The status of a requisition can be updated at any time by users with necessary permissions.

These steps are taken from the *Requisition Detail* page. This action can also be taken from the main *Requisitions* page as a batch action.

1. Select the **Change Status** option from the **Take Action** drop-down list.
2. In the *Change Status* pop-up window, select the new status from the available drop-down list.

Note: The status options that appear in the drop-down list are dependent on which status the requisition is currently in. Not all statuses will be available.

3. Click the **OK** button. The pop-up will reload and display a confirmation of the status change.
4. Click the **OK** button to finalize the status change.

Clicking the **OK** button in the confirmation pop-up window reloads the page, and a message displays stating the requisition status has successfully been changed.

The **Requisition Status History** area found on the *Requisition Detail* page for a specific requisition displays the status change.

Copying a Requisition

Existing requisitions can be copied to create new requisitions using the same data. This helps speed up the creation process when creating new requisitions that are similar to ones already in the system.

You may copy a requisition in any status; however, the new requisition you create will begin in the "Draft" status, just as if you were creating it from scratch.

What gets copied?

When copying a requisition, all of the fields for the requisition are carried over to the new copy. This includes all fields found in the **Basic Data** and **Requisition Details** section of the *Requisition Detail* page. Additionally, any documents attached to the original requisition are also copied over.

Notes are not included in the copy process.

Steps

When you copy a requisition, you are placed into the Create Requisition wizard used when creating new requisitions. The only difference is that the wizard opens up to Step 3 (**Enter Req Details**), and the Req Details form is pre-populated with information from the original requisition.

-
1. Open the *Requisition Detail* page for the requisition you wish to copy.
 2. Select the **Copy** option from the **Take Action** drop-down list. The page reloads and a pop-up window opens to Step 3 (**Enter Req Details**) of the Create Requisition wizard.
 3. Complete the wizard as you would for a new requisition.

[Click here to view the topic on using the create requisition wizard.](#)

Completing the requisition process is the same for new and copied requisitions. After the **Submit for Approval** or **Save** button is clicked, the page reloads and displays a message stating the requisition was successfully submitted (or saved).

The user selected to review the requisition receives an email notification informing them of the new requisition that requires their approval.

Deleting a Requisition

Requisitions can be deleted from the system provided they have a compatible current status. Requisitions with a status of "In Process", "Active - Not Posted" or "Active - Posted" cannot be deleted.

Warning: Deleted requisitions are **permanently** removed from the system and can not be recovered. Data from deleted requisitions do not appear in any reports in the system.

These steps are taken from the main *Requisitions* page.

1. Check the box next to the desired requisition(s).
2. Select the **Delete Requisition** option from the **Take Action** drop-down list. A confirmation dialog will open asking if you are sure you wish to delete the selected requisition(s).
3. Click the **OK** button.

After the **OK** button is clicked, the *Requisitions* page reloads and displays a message stating the selected requisition(s) were successfully deleted. The selected requisition(s) no longer appears in the table.

Editing a Requisition

Users with necessary privileges have the ability to make updates to existing requisitions in the system.

1. From the main *Requisitions* page, click the link for the requisition under the "Position Title" column. This will open the **Req Detail** tab on the *Requisition Detail* page. The requisition form automatically opens in edit mode.

Dashboard
Requisitions/Jobs
Applicants
Reports
Admin
arecruiter
Help

HCS IRIS Client / Requisitions / Requisition Detail

Emergency Room Nurse [Req # 1259]

Take Action
Status In Process

Requisition Information

Req Details
Job Postings
History Detail

Standard Information

Requisition Number 1259
Position Title Emergency Room Nurse (ER55 -2010)
Hiring Manager amananager, Heather
Organization Boston Clinic/Surgical (Code)
Recruiter Arecruiter, Heather
Created Date 7/24/2014

Requisition Details

Reason for opening
New Position
Replacement
Temporary
Replacement for?

Schedule/Hours:

Schedule Full Time
Hours/Pay Period
Shift Days
FTE
Hours 40

Pay/Compensation:

Pay Grade Pay Grade 10
Sign on Bonus
Salary \$10.00-\$15.00
Referral Bonus 1500

Requirements:

Education Masters Degree
License/ Certification Emergency Medi...
Experience 3-5 years

Job Summary

Source

Responsible and accountable for direct nursing care on a given unit during a specific shift. Provides comprehensive clinical care and ensures that patient care is delivered in accordance with the Nurse Practice Act and National Standards of Care as identified by respective professional organization and the vision, mission, values, goals and scope of care and services of the organization. The Professional Nurses this Hospital practice the Art and Science of Caring as described by the Ten Caritas Processes in Jean Watson's Theory of Human Caring: practice of loving-kindness, authentically present with faith and hope, sensitivity to self and others, trusting caring relationships, allowing expression of positive and negative feelings, creative problem-solving, relational teaching-learning, creating healing environments, assistance with basic needs, and allowing for mystery and miracles.

Knowledge & Skills Required:
1. Ability to concentrate and pay close attention to detail and resolve complex patient care situations
2. Communication skills, verbal and written needed to document, read and interpret patient information, policies, procedures and to respond and relay information to a variety of clinical

Characters: 1862

Approvals

Action
Approve
Reject

Approval Complete

Comment

Select Next To Approve

Save
Cancel

Notes

Create Date
Created By
Note

There were no matches for your search criteria. Please search again.

Page 1 of 0
Displaying items 0 - 0 of 0

Requisition Workflow History

Date
Action
User
7/24/2014 Created Arecruiter, Heather
7/24/2014 Approved Arecruiter, Heather
7/24/2014 Sent To Areqapprover, Heather

Last Modified by Arecruiter, Heather on 7/24/2014

Note: If you do not have the necessary privileges to edit a requisition, the **Req Details** tab displays in read-only mode.

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Note: If the selected requisition is in a "Draft" status, the requisition creation wizard automatically opens to the **Enter Req Details** step. From there you can continue the [requisition creation process in the wizard as described in this topic](#).

2. Make the necessary updates to the available fields on the requisition form.
3. Click the **Submit for Approval** button to send the requisition to the user selected in the Approvals section.

You can also click the **Save** button if you do not want to submit the requisition for approval yet.

Note: Only requisitions with a status of "Draft", "Recalled" and "Rejected" will have the **Submit for Approval** button. Requisitions in all other states will only show a **Save** button.

Once the **Submit for Approval** or **Save** button is clicked, the page reloads and displays a message stating the requisition was successfully saved.

If **Submit for Approval** is selected, the user chosen as the next reviewer receives an email notification about the requisition that requires their approval.

Final Approval for Requisitions

Final approval for requisitions means users with the necessary privileges can complete the approval process of a new requisition during the creation process without having to select an approving user.

When a requisition is in a "Draft" (or "Recalled") status, the **Submit for Approval** step shows an option to mark the requisition as "Approval Complete". Checking this option marks the status of the requisition as "Approved", and you can immediately move onto the **Job Posting** step of the process.

Note: Final approval is a permission controlled on the *User Roles* page in the **Admin** area. If you do not see an **Approval Complete** option in the **Submit for Approval** step, then you do not have the necessary permissions to approve the requisition.

Katon Quick Count

The **Katon Quick Count** tool allows hospitals to measure the total number of potential candidates by geography and specialty to make better decisions about recruiting strategies and to accurately set expectations within organizations.

Katon Quick Count displays the total number of qualified candidates within a certain drive time of their facility and target recruitment effort towards these candidates. Providing this information allows recruiters to better understand the labor supply for a particular skill set within a defined distance from the hiring facility, then use that information to calibrate expectations on how easy or difficult it will be to generate interest for your recruitment needs based on the available local talent.

Armed with that knowledge, you're better able to determine if you need to modify messaging or selling points if the available labor supply is low to make offers more attractive.

Katon Quick Count

Zip search is all candidates within 20 miles

01801

or

State

Registered Nurse

from Years of experience to

0 1 2 3 5 7 10 15 20 30+

WOBURN, MA	Commutable to 01801
Med Surg	2,276
Critical Care	1,487
Other Specializations (~13 available)	7,417
<small>contact Katon Direct for detailed count</small>	
All Registered Nurses	11,180

powered by
KatonDirect

Engage Candidates You Can't Reach

- > Audience Extension
- > Grow Your Talent Community
- > Branded, Personalized Candidate Marketing

LEARN MORE

Expand Your Candidate Pool

EXAMPLE

Note: Katon Quick Count is currently not available when using Internet Explorer.

Using Katon Quick Count

Katon Quick Count can be found on the *Requisitions/Jobs* page in Position Manager. Using it is quick and easy: just

select a geographical location (**Zip Code** or **State**) and a job category, and the tool displays the size of the available talent pool.

1. Click the **Talent Population** button. This opens a pop-up window that contains the tool.



2. In the pop-up window, enter a specific **Zip Code**, or select a **State** from the drop-down menu. (You only need to complete one of these fields to see results.)

Enter Zip Code

or

Massachusetts

3. Select a job category from the drop-down menu.
4. Adjust the **Years of experience** slider as needed.



As soon as you select a geographical location, the window displays the results under the fields. As you begin to refine the search by modifying the location, selecting different job categories, or moving the experience slider, the results are automatically updated.

Katon Quick Count

Zip search is all candidates within 20 miles

01801

or

State

Registered Nurse



WOBURN, MA

Commutable to

01801

Med Surg

2,276

Critical Care

1,487

Other Specializations (~13 available)

7,417

contact Katon Direct for detailed count

All Registered Nurses

11,180

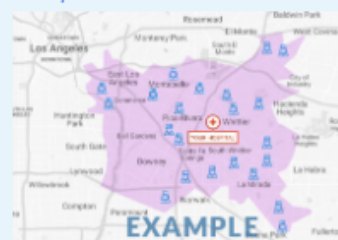


Engage Candidates You Can't Reach

- > Audience Extension
- > Grow Your Talent Community
- > Branded, Personalized Candidate Marketing

LEARN MORE

Expand Your Candidate Pool



Pre-Qualification

Pre-qualification is a useful tool for quickly determining if an applicant meets the minimum requirements for an open position at your organization. By setting up some basic questions suited to the core requirements of the job, hiring managers receive a better-qualified and more focused pool of suitable applicants.

Add Requisition

Select Organization

Select Template

Enter Req Details

Pre-Qual Questions

Ranking Questions

Submit for Approval

Post Job

Pre-Qualification Questions

Pre-Qualification Questionnaire

PreQualQuestionnaire

Instructional Text

Pre-Qualification Questionnaire Instructions

+ View Job Summary

+ Add

✖ Remove

⬆ Move Up

⬇ Move Down

Add Suggestions ⓘ

<input type="checkbox"/>	Seq #	Question Text	Answer Type
<input type="checkbox"/>	1	Question1	Radio Buttons
<input type="checkbox"/>	2	Question2	Radio Buttons

To change the order of questions, highlight a row from the list and click the **Move Up** or **Move Down** button.

Rejection Message

Rejection Message:

Default Prequalification Message

Preview:

Thank you for your interest in {{Requisition:PositionTitle}} but you did not meet the minimum qualifications for this position. {{Client Name}} welcomes you to apply to our other open positions that you are interested in and qualified for.

Questionnaire Save Options

☐ Save your changes for this posting only
 ☐ Save your changes as a new questionnaire template

Name:

Display Name:

Discard Changes

Cancel

Previous

Next

Pre-qualification questions can be added to requisitions during the creation process (from the *Add Requisition* wizard) and when posting a job. Questions can be added using pre-defined templates, suggested pre-qualification questions (based on field-level questionnaires), and manually adding individual questions.

During the create requisition process, pre-qualification questions can be added, removed, and sorted using the **Add**, **Remove**, **Move Up** and **Move Down** buttons in the *Pre-Qual Questions* step of the wizard.

Pre-qualification questions are presented to applicants early in the apply process. Depending on their answers, they are either allowed to continue along the application process, or are disqualified from consideration and receive a rejection message.

Pre-Qualification Questionnaire

Pre-Qualification Questionnaire Instructions

Are you able to work a total of 40 hours per week, including weekends and holidays?

☒ Yes
☐ No

Can you stand on your feet for extended periods of time?

☒ Yes
☐ No

Print

Questionnaire templates

A pre-qualification questionnaire templates can be created and applied to requisitions and job postings at any time. These templates are created from the *Questionnaires* page in the **Admin** area.

HCS IRIS Client / Questionnaires / Questionnaire Detail

Take Action

Basic Information

* Name

Nurse PreQualQuestionnaire

* Display Name

Nurse PreQualQuest

Instructional Text

As part of our pre-qualification process that all applicants must complete, please provide an answer to the question(s) below.

Status

☒ Active
☐ Inactive

Questionnaire Type

Pre-qualification

Question Information

+ Add

✗ Remove

▲ Move Up

▼ Move Down

?

	Seq #	Question Text	Answer Type
<input type="checkbox"/>	1	Are you able to work 40 hours a week in varying shifts?	Radio Buttons
<input type="checkbox"/>	2	Are you able to stand for extended periods of time?	Radio Buttons

To change the order of questions, highlight a row from the list and click the **Move Up** or **Move Down** button.

Save

Cancel

Preview

These templates can be added to requisitions in the *Pre-Qual Questions* step of the *Create Requisition* wizard, or when posting a job to career sites. Once templates are added to a requisition, edits can be made to the questions as necessary.

Field-level questions

Field-level questions are questions assigned to specific fields in Position Manager. When these fields are included on a requisition form, the questions associated with the fields can easily be added to the requisition in the **Pre-Qual Questions** step of the *Create Requisition* wizard with a single click. [Learn more](#)

The screenshot shows the 'Add Requisition' wizard with the 'Pre-Qual Questions' step selected. The left sidebar contains a navigation menu with options: 'Select Organization', 'Select Template', 'Enter Req Details', 'Pre-Qual Questions' (highlighted), 'Ranking Questions', 'Submit for Approval', and 'Post Job'. The main content area is titled 'Pre-Qualification Questions' and includes a dropdown for 'Pre-Qualification Questionnaire' set to 'PreQualQuest', a text area for 'Instructional Text' with 'Pre-Qualification Questionnaire Instructions', and a '+ View Job Summary' link. Below these are buttons for '+ Add', 'X Remove', 'Move Up', 'Move Down', and 'Add Suggestions' (circled in green). A table lists questions with columns for 'Seq #', 'Question Text', and 'Answer Type'. The first row shows '1 Are you able to work 40 hours per week?' with 'Radio Buttons' as the answer type. A note states: 'To change the order of questions, highlight a row from the list and click the Move Up or Move Down button.' The 'Rejection Message' section has a 'Please Select' dropdown. The 'Questionnaire Save Options' section has two radio buttons: 'Save your changes for this posting only' (selected) and 'Save your changes as a new questionnaire template'. Below these are input fields for 'Name' and 'Display Name', and a 'Discard Changes' button. At the bottom are 'Cancel', 'Previous', and 'Next' buttons.

Manually adding questions

In addition to the available templates, individual pre-qualification questions can be added to requisitions in the *Pre-Qual Questions* step of the *Create Requisition* wizard. This allows you to fine-tune the questions presented to applicants during the apply process.

Add a Question

Question

* Question

Are you able to work 8:00 AM to 5:00 PM 5 days a week, which may also include weekend days and holidays?

{0}

 will be replaced with content selected during Requisition Details Step.

* Answer Type

Radio Buttons

* Orientation

☐ Horizontal
 ☒ Vertical

Answers

+ Add

- Remove

▲ Move Up

▼ Move Down

	Seq #	* Display Text	* Correct?
<input type="checkbox"/>	1	Yes	<input checked="" type="radio"/>
<input type="checkbox"/>	2	No	<input type="radio"/>

To change the order answers are displayed, highlight a row from the list and click the **Move Up** or **Move Down** button.

OK

Cancel

Printing a Requisition

Position Manager allows you to print a hardcopy of requisitions in the system. These can be printed to paper or saved to a file for future reference.

These steps are taken from the *Requisition Detail* page.

1. Select the *Print* option from the **Take Action** drop-down list. A new tab (or window) opens in your browser displaying the requisition.
2. From this window, use your browser's **File** menu to print the requisition to the printer of your choice.

Selecting the *Print* option opens a new window (or tab) in your browser that displays the information associated with the requisition, formatted for a printed view.

You can now send this information to your local printer, or save the requisition as a file on your computer in a variety of formats (including MS Word or PDF).

RequisitionID 23

1 of 1
100%
Find | Next

Basic Information

Requisition Number:	1007	Position Title	CRNA
Hiring Manager	Tim Lynch	Organization	Boston Hospital/Boston Health Group/HCS IRIS Client - Global
Recruiter	David St. Pierre		

Requisition Details

Reason for Opening	Replacement for ?		
Schedule/Hours:			
Schedule	Days	Hours/Pay Period	
Shift	Full-time	FTE	
Hours	45		
Pay/Compensation:			
Salary Range	\$25.01-\$30.00	Sign on Bonus	
Pay Grade	Pay Grade 5	Referral Bonus	
Requirements:			
Education	Bachelors Degree	License / Certification	
Experience			

Job Summary

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam et malesuada ante. Aliquam egestas posuere tincidunt. Duis imperdiet viverra arcu, a auctor odio ullamcorper quis. Morbi a erat vitae lorem elementum suscipit nec vitae massa. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Maecenas eu nibh sed neque vestibulum auctor at a odio. Nam nulla risus, ultricies sit amet vehicula nec, auctor eu metus. Quisque nibh tellus, volutpat eu rutrum a, tincidunt at lorem. Quisque convallis, mi ut aliquam ultrices, nisl diam fermentum quam, quis fringilla ipsum augue eget neque. Curabitur ut luctus est. Pellentesque tincidunt, leo ut dictum molestie, nisi velit volutpat arcu, eget sagittis purus orci non est. Proin rutrum mollis nisi, ut dapibus purus dignissim fermentum. Nunc sed rhoncus odio. In nec urna ligula. Etiam non mi et augue pulvinar accumsan. Suspendisse interdum elit sed lectus feugiat facilisis. Mauris eu ligula augue, vel auctor turpis. Sed vitae lacinia erat. Curabitur dictum, massa et mollis euismod, lectus nunc congue lorem, id accumsan odio elit sed lectus.

Job Description

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Reassigning Approvers

Position Manager allows you to update the user assigned as an approver to a requisition. This feature comes in handy for those times when the assigned approver is unavailable or unable to review the requisition. In these cases, you can change the approver in order to keep the requisition process moving.


You can only reassign an approver for requisitions that are in a state of "In Process".

These steps are taken from the *Requisition Detail* page. This action can also be taken from the main *Requisitions* page as a batch action.

1. Select the **Reassign Approver** option from the **Take Action** drop-down list. The *Reassign Approver* pop-up window opens.



Reassign Approver ✕

Requisition reassign notification(s) will be sent to the following Approver(s):

* Reassign Approver 

POSITION TITLE	CURRENT APPROVER
Emergency Room Nurse [Req # 1259]	Areqapprover, Heather

Comment:

Heather on PTO for two weeks; reassigning due to urgency of requisition.



OK **Cancel**

2. Using the user lookup, select a new approver for the requisition.
3. Enter notes into the **Comments** field, if necessary.
4. Click the **OK** button.

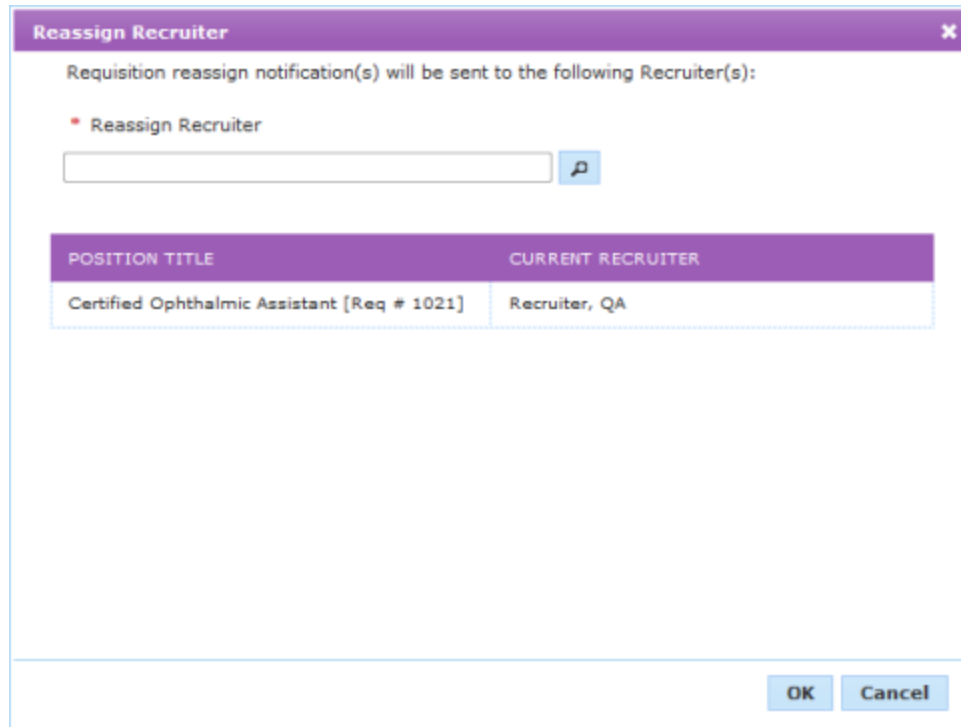
Clicking the **OK** button reloads the page, and a message displays stating the approver has been updated for the selected requisition(s).

Reassigning Recruiters

Position Manager allows you to update the user assigned to the recruiter role for a requisition.

These steps are taken from the *Requisition Detail* page. This action can also be taken from the main *Requisitions* page as a batch action.

1. Select the **Reassign Recruiter** option from the **Take Action** drop-down list. The *Reassign Recruiter* pop-up window opens.



The **Reassign Recruiter** pop-up window has a purple title bar with a close button. Below the title bar, it states: "Requisition reassign notification(s) will be sent to the following Recruiter(s):". There is a red asterisk followed by the text "Reassign Recruiter". Below this is a text input field and a blue button with a magnifying glass icon. A table is displayed with two columns: "POSITION TITLE" and "CURRENT RECRUITER". The table contains one row with the values "Certified Ophthalmic Assistant [Req # 1021]" and "Recruiter, QA". At the bottom right of the window are "OK" and "Cancel" buttons.

POSITION TITLE	CURRENT RECRUITER
Certified Ophthalmic Assistant [Req # 1021]	Recruiter, QA

2. Using the user lookup, select a new recruiter for the requisition.
3. Click the **OK** button.

Clicking the **OK** button reloads the page, and a message displays stating the recruiter has been updated for the selected requisition(s).

Requisition Status

As a requisition moves through the process of creation, approval and fulfillment in Position Manager, the status is updated to reflect its current position in the workflow.

Position Manager uses a color coding system to help you quickly identify the status of a requisition. These color-coded statuses appear on the main *Requisition* and *Requisition Detail* pages.

- **Draft.** The requisition has been created, but the Hiring Manager has yet to send it out for review and approval.
- **In process.** The requisition has been sent out for review, and is in the process of being approved by necessary Requisition Approvers.
- **Rejected.** A subset of In process; the requisition has been reviewed and rejected by an approver. A rejected requisition can be re-submitted by the creator after necessary updates have been made.

-
- **Recalled.** The requisition has been "taken back" by an HR user. It is removed from the approval process, but can be re-submitted after necessary updates have been made.
 - **Approved.** The requisition has been approved by all necessary approvers.
 - **Active - Not Posted.** This requisition is one that has been approved by all reviewers, but has yet to be posted to a job board or career site (or the posting was removed).
 - **Active - Posted.** A requisition moves to this status once it is placed on a career site or job board.
 - **Filled.** This means an applicant has been hired for the requisition, and the position is no longer open.
 - **Hold.** This status suspends all potential actions for a requisition. A requisition may be placed on Hold at any point in its lifecycle.
 - **Canceled.** Canceling a requisition permanently halts all actions on a requisition. The position will not be filled. A requisition may be canceled at any point in its lifecycle. A cancellation may be undone by picking **Update Status** from the **Take Action** drop-down menu, and selecting a different status.

Resending a Requisition for Approval

When a requisition is sent for approval, the current approver receives an email that contains a link providing access to review and approve the requisition. If an approver misplaces or deletes an approval email, you can manually resend a new one.

Note: Only requisitions in a state of "In Process" can be resent for approval.

These steps are taken from the *Requisition Detail* page. This action can also be taken from the main *Requisitions* page as a batch action.

1. Select the **Resend for Approval** option from the **Take Action** drop-down list. A confirmation pop-up window opens stating an approval notification will be sent to the current approver for the requisition.
2. Click the **OK** button.

Clicking the **OK** button in the confirmation pop-up window reloads the page, and a message displays stating the requisition(s) have been sent for approval.

An email is sent to the current approver that contains a link providing them access to review and approve the requisition(s).

Resubmitting a Rejected/Recalled Requisition

If a requisition has been either rejected or recalled, users with the necessary privileges have the ability to re-submit the requisition without having to re-create it as a new requisition in the system.

You can not re-submit a canceled requisition.

These steps take place from the *Requisition Detail* page.

-
1. On the *Requisition Details* page, make any necessary edits to the requisition.
 2. Locate and complete the **Approvals** section of the *Requisition Detail* page.
 3. When finished making edits, click the **Save** button.

Clicking the **Save** button saves the edits to the requisition and re-submits it for approval as indicated in the **Approvals** section.

Job Postings

A job posting is an instance of a job “advertisement” on your career site, the HealthcareSource Job Board, or any third party job boards. The details for the job posting are taken from a requisition that has been approved.

Job postings can be posted on internal or external job sites. External postings can be managed through the Position Manager system, or manually posted to non-related external job sites.

Note: Postings to HealthcareSource-hosted career sites (internal and external) are controlled through Position Manager - meaning they are automatically posted to sites using the Position Manager system. Postings to other non-related third-party sites, such as Monster.com, are not controlled through Position Manager and must be posted manually.

You can have multiple job postings for a single requisition, but you can only post to the same site once for each requisition.

Requisitions vs. Job Postings

Every job posting starts as a requisition in Position Manager - there is no separate area used to find and manage job postings. In order to locate a specific job posting, you will perform a search for requisitions with a status of "Active - Posted."

The *Requisition Detail* page includes an informational tab labeled **Job Postings**. This tab provides details about the job posting itself (questionnaires used, contact information, etc.).

Posting a Job

Once a requisition has been approved, it can then be posted to career sites for potential applicants to review.

Posting a job to job boards so applicants can submit their information consists of completing the Job Posting form for an approved requisition.

There are two ways to reach the Job Posting form:

- **Create Requisition wizard.** The final step of the Create Requisition wizard is Post Job. If you have the necessary permissions, you are able to access this form directly from the wizard and post the job.
- **Requisition Detail page.** Every requisition has a **Job Posting** tab on its *Requisition Detail* page. This tab contains the job posting form (the same one you would find in the Create Requisition wizard). If you have the necessary permissions and the requisition has been approved, you can complete the job posting form and post the job from this **Job Posting** tab.

To post a job:

-
1. Open the Job Posting form using one of the two methods described above.
 2. Complete the Job Posting form.



Requisition Information

Req Details Job Postings History Detail

HCS IRIS Client/Boston Health Group/Boston Hospital/Emergency

Job Posting Form for requisition Accountant [req# 1055]

Career Site

* Start Date 
 End Date 
 Internal Only ☒ For: day(s)
 Featured Job ☐
 Applicant Apply Email ☐

Posting Created: 9/7/2016

































Screening



































Pre-Qualification Questionnaire [Edit](#)
 Pre-Qualification Rejection Message
 Ranking Questionnaire
 Behavioral Assessment
 Job Family
 Reference Benchmark



































Posting Information

* Job Category
 * Job Posting Display Title
 * Address 1
 Address 2
 * City
 * State
 * Zip Code

Job Summary

































Source











































































































































































Styles
Format
Font
Size

Additional Information

Source

































Styles
Format
Font
Size

Display Additional Information

Display Contact Information

Additional Information

☐ Yes ☒ No

Job Posting form details

Career Site

The screenshot shows a web form titled "Career Site". It contains the following fields and options:

- * Start Date:** A date input field with "7/1/2012" entered and a calendar icon.
- End Date:** A date input field with "8/1/2012" entered and a calendar icon.
- Internal Only:** A checkbox that is currently unchecked, followed by the text "For: " and a text input field, and then the word "days".
- Featured Job:** A checkbox that is currently checked.
- Posting Created:** A text label showing "8/8/2012".

- **Posting Start Date.** Determines which date the job posting will begin to appear on job sites.
- **Posting End Date.** This date is when the job is removed from job boards, regardless if the position is filled or not.

Tip: You do not have to enter a date in the **Posting End Date** field. Leaving the field blank will keep the posting on the site until the requisition status is changed to "Filled" or it is manually removed.

- **Internal Only.** This option keeps the posting on internal job boards when one is enabled. If no internal site is available, the job is labeled as "Internal Only" on external sites.

You also have the option to enter the number of days you wish to keep the posting on internal boards only; once the set number of days has passed, the posting is sent to selected external boards.

Note: Leaving the **Days** field blank means the posting will only appear on your internal job site - it will not be posted to external sites.

Note: The **Days** field is controlled by system settings under the **Admin** tab and may not be available for editing.

- **Featured Job.** Featured jobs are listed first on the HealthcareSource career site.
- **Applicant Apply Email.** Sends an email to the recruiter when an application is received.

Screening

Screening	
Pre-Qualification Questionnaire	PreQualQuest Preview
Pre-Qualification Disqualification Message	Please Select Preview
Ranking Questionnaire	RankingQuest
Global Questions	<input type="radio"/> Yes <input checked="" type="radio"/> No
Assessments	

The Screening section of the job posting form contains drop-down lists to select any necessary questionnaires you want applicants to complete during the application process.

Posting Information

- **Job Category.** Determines the category the job posting is associated with on the job board.
- **Job Posting Display Title.** This field is used to set the display name for the job on the job boards.
- **Address fields.** Allows you to include an address related to the opening.
- **Job Summary.** The job summary text from the requisition appears in this field. Edits can be made, if necessary.
- **Additional Information.** Another text editor that allows you to add/edit information regarding the facility for the job opening. Under the text editor is an option to display the information on the job boards.
- **Display Additional Information.** Determines if text in the **Additional Information** field is displayed.
- **Display Contact Information.** This option determines if contact information is displayed within the job posting itself.

If selected, additional fields appear that allow you to select the system user whose contact information you want to include in the posting, and which options for the user you wish to display (Name, Address, Email, Phone, Fax).

Job Distribution

This section contains a list of all the available job boards you can post the opening to. Options that appear in this section depend on which job boards your organization utilizes for postings.

3. When finished with the form, click the **Post Job** button.

Clicking the **Post Job** button saves the form and posts the job to the selected sites. A pop-up window displays stating that the job has been posted.

The status of the requisition is automatically updated to "Active - Posted".

Searching for Job Postings

Searching for job postings means you are searching for requisitions that have been posted to job sites and had their status updated to "Active - Posted".

1. From the main *Requisitions* page, locate the **Search** area in the column on the left of the page.
2. From the **Status** drop-down list, select the **Active - Posted** option.
3. Select values for the criteria you wish to search against using other available fields, if necessary.
4. When all necessary criteria has been entered, click the **Search** button.

The table reloads to display those results that match the criteria used for the search.

Editing a Job Posting

Job postings can be edited even after they are placed on job boards. Updates to postings are immediately reflected on job boards associated with Position Manager.

These steps are taken from the *Requisition Detail* page.

1. Click the **Job Postings** tab in the *Requisition Information* area. If you have the necessary privileges to edit a posting, the job posting form automatically opens in edit mode.
2. Make the necessary edits to the available fields on the page.

Note: Not all fields on the job posting form are editable.

3. When complete making edits, click the **Save** button.

Clicking the **Save** button reloads the page and displays a message stating the job posting was successfully updated.

Expiring a Job Posting

Job postings can be expired, or removed from a career site, at any time.

These steps are taken from the *Requisition Detail* page.

1. Select the **Expire Posting** option from the **Take Action** drop-down list. A confirmation pop-up window opens.
2. Click the **OK** button.

Clicking the **OK** button closes the pop-up window and reloads the page. The job posting is removed from the career site and now shows a status of "Expired".

About People

The **People** area in Position Manager has been designed as a one-stop shop for personnel. It provides a single place to search or browse lists of potential candidates for openings, review applications that have been submitted to job postings, and transition selected applicants into positions.

The sub-pages available in the **People** area include:

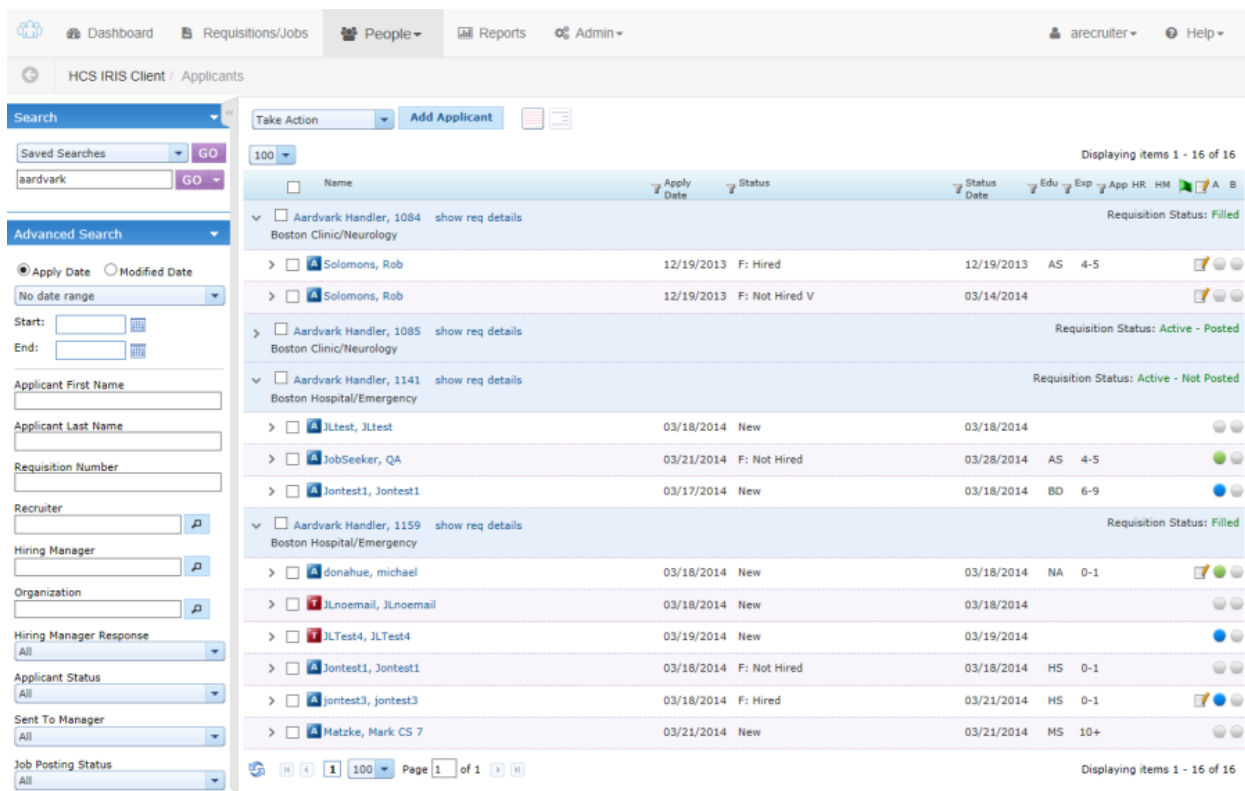
- [Applicants](#). The *Applicants* page displays a full list of every application received for specific requisitions in Position Manager. This is where users review, compare, process, and select applicants for job openings.
- [New Hires](#). The *New Hires* page displays a special sub-set of applications from the main *Applicants* page. Specifically, it is a quick and easy way to view those applicants that have been selected for hire for a job opening.
- [Talent Pool](#). The *Talent Pool* page displays a list of passive candidates. These are potential applicants that can be searched to find those that meet the specific requirements for openings.

Applicants

The *Applicants* page under the **People** area allows you to manage both applicants and their submitted applications in the Position Manager system. You can also perform bulk actions on multiple applications at once using the drop-down list above the table.

Page Overview

The main *Applicants* page provides a table view of applications in the system.



The table defaults to a search of new and active applicants, but you can filter the table using the **Search** panel to the left of the page. The [Quick Search](#) feature allows you to search against multiple fields at once.

There is also a **Recent Applicants** area under the search panel that provides a list of recently accessed applicants.

Clicking the link under the "Applicant Name" column will take you to the *Applicant Detail* page for the selected item.


Table Features

There are several available features in the applicant table to help you easily locate, review, and disposition applicants. Click a feature below to view details about each.

Table Views

The table offers two views for the applicant list:

- **Main.** This view provides numerous details about the application to help you quickly review candidates. This is the default view.


	NAME	APPLY DATE	STATUS	STATUS DATE	EDU	EXP	APP	HR	HM			A	B	R
▼	Candlepin Bowler, 1038	show req details												
>	 Bergeron, Patrice	02/23/12	New	02/23/12	100	90	80							

Main view columns

The columns available in the Main view are as follows:

- **Application Type icon.** Clicking this icon opens the Applicant Snapshot Report in a new window.
 - "A" indicates a regular Application (External Applicants)
 - "S" indicates a short apply application
 - "T" indicates a Transfer application (Internal Applicants)
 - **Applicant Name** (last name, first name).
 - **Apply Date.** Date the application was submitted.
 - **Status.** Current status of the application.
 - **Status Date.** Indicates the last time the status of the application was updated.
 - **EDU.** Highest Education from the application.
 - **EXP.** Total Years Experience from the application.
 - **APP.** Applicant's self-ranking (from Ranking Questionnaire). Clicking the link opens a new window that displays the applicant's responses to the ranking questionnaire.
 - A "0" in this column indicates the applicant did not answer.
 - **HR.** Human Resources Ranking. Clicking the link opens a new window that displays the recruiter responses to the ranking questionnaire.
 - A hyphen ("-") indicates the recruiter has not yet completed the questionnaire. Clicking the hyphen opens the questionnaire in edit mode for completion.
 - **HM.** Hiring Manager Ranking. Clicking the link opens a new window that displays the hiring manager responses to the ranking questionnaire.
 - A hyphen ("-") indicates the hiring manager has not yet completed the questionnaire. Clicking the hyphen opens the questionnaire in edit mode for completion.
 - **Flag icon.** Hiring Manager Comments indicator. If a flag icon appears in this column, the Hiring Manager has left comments about the applicant. Clicking the flag icon expands the applicant row with the **Messages and Tasks** tab open.
 - **Notes icon.** If a Note icon appears in this column, at least one note exists for the applicant. Clicking the note expands the applicant row with the **Notes** tab open.
 - The final three columns are indicators for **applicant screening**. Clicking an entry in this column expands the applicant row with the **Screening** tab open.
 - "A" for Assessment
 - "B" for Background Check
 - "R" for Reference
-
- **Compare.** The Compare view provides a slightly different set of columns for each applicant that help compare applicants to both the requisition and each other. Hiring Managers will find this view helpful to quickly locate and

review applicants.

	NAME	APPLY DATE	ADDITIONAL	EDU	EXP	SCH	SHF	LIC	APP	HR	HM
▼	Lead Cardiac Monitor Tech, 0440	show req details									
>	 Washington, George	01/12/12	(1, 0, 0, 1)	HS	0-1	R	t	EMT	10	9	8

Compare view columns

The columns available in the Compare view are as follows:

- **Application Type icon.** Clicking this icon opens the Applicant Snapshot Report in a new window.
 - "A" indicates a regular Application (External Applicants)
 - "S" indicates a short apply application
 - "T" indicates a Transfer application (Internal Applicants)
- **Applicant Name** (last name, first name).
- **Apply Date.** Date the application was submitted.
- **Status.** Current status of the application.
- **Additional.** Numbers listed here indicate other applications the applicant has submitted.
 - First number indicates all applications in a New or Active status. Color: black.
 - Second number indicates all applications in a "File-Not Hired" status. Color: red.
 - Third number indicates all applications in a "File-Not Hired Viable" status. Color: green.
 - Fourth number indicates all applications in a "Hired" Status. Color: blue.
- **EDU.** Highest Education from the application.
- **EXP.** Total Years Experience from the application.
- **SCH.** Work Schedule from the application.
- **SHF.** Shift from the application.
- **LIC.** License from the application.
- **APP.** Applicant's self-ranking (from Ranking Questionnaire). Clicking the link opens a new window that displays the applicant's responses to the ranking questionnaire.
 - A "0" in this column indicates the applicant did not answer.
- **HR.** Human Resources Ranking. Clicking the link opens a new window that displays the recruiter responses to the ranking questionnaire.
 - A hyphen ("-") indicates the recruiter has not yet completed the questionnaire. Clicking the hyphen opens the questionnaire in edit mode for completion.
- **HM.** Hiring Manager Ranking. Clicking the link opens a new window that displays the hiring manager responses to the ranking questionnaire.
 - A hyphen ("-") indicates the hiring manager has not yet completed the questionnaire. Clicking the hyphen opens the questionnaire in edit mode for completion.

Both views group the applicant list by their associated requisition. To help you compare applicant qualifications to the requisition, click the **show req details** link to expand the grouping header and display additional information about the requisition.

Lead Cardiac Monitor Tech, 0440 hide req details														
Boston Clinic		Org Code:		Shift:	Temporary	Contact:	Recruiter:	Date Posted:		2/13/2012				
Job Code:		Code		Schedule:	Weekends	Manager:	Patrick Rubeski	Questions:		Prequal				
<input type="checkbox"/>		Washington, George			01/12/12	A: Ref Compl	02/10/12	HS	0-1	10	9	8		
<input type="checkbox"/>		Obama, Barack			01/22/12	F: Hired	02/10/12	TS	0-1	20	18	16		
<input type="checkbox"/>		Clinton, Hillary			01/25/12	A: Ph Screen	02/10/12	AD	3-5	30	27	24		
<input type="checkbox"/>		Albright, Madeline			01/27/12	New	02/10/12	TS	1-2	35	32	28		
<input type="checkbox"/>		Lincoln, Abraham			01/19/12	A: Ref Compl	02/10/12	BD	3-5	30	27	24		
<input type="checkbox"/>		Kennedy, John			01/29/12	A: Offer Acc	02/10/12	BD	1-2	5	4	4		
<input type="checkbox"/>		Roosevelt, Franklin			01/06/12	A: Offer Rej	02/10/12	BD	3-5	0	-	-		
<input type="checkbox"/>		Obama, Michelle			01/30/12	A: Check Ref	02/10/12	BD	0-1	20	18	16		
<input type="checkbox"/>		Jefferson, Thomas			01/26/12	A: Offer Acc	02/10/12	MD	0-1	30	27	24		

Table Sorting and Filtering

The table can be sorted by clicking on any of the available column headings. The sort order applies to all pages of your search results if they span more than a single page. If you click an applicant to view details and then return to the search results, the sort order is retained.

There is also a filter feature, [which is described in more detail in this topic](#).

Applicant Business Card

If you hover your cursor over an applicant's name in the "Name" column of the table, a small pop-up window, or applicant business card, appears containing contact information about the applicant.

Washington, George (Tracking ID: 21) ✖

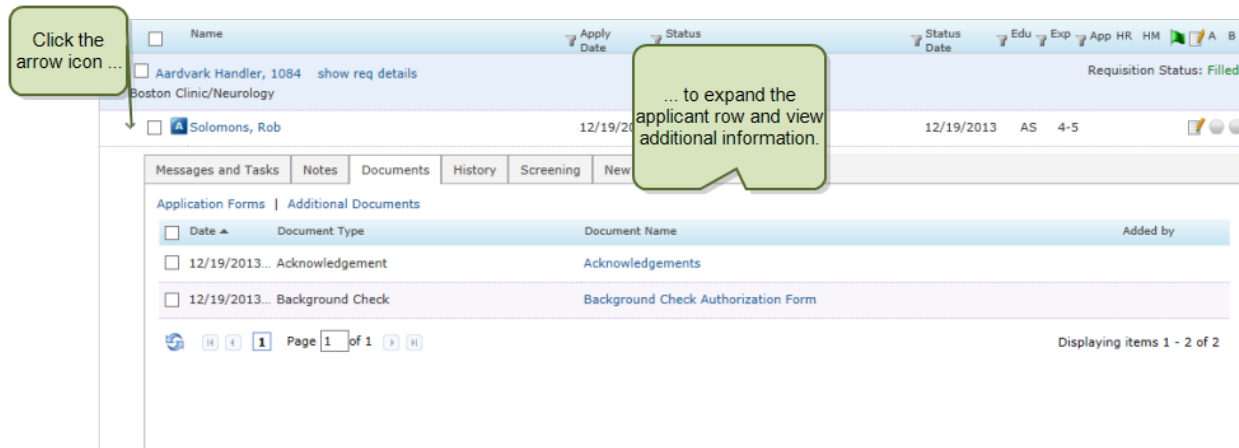
Contact Info
24 Main St
Apt 20
Boston, AL 06078
345-234-456 (Home)
george.washington@healthcaresource.com
Type: Re-Assign
Previous Applications: (1, 0, 0, 1)

Clicking the email address link opens the *Send Correspondence* pop-up window where you can send an email to the applicant, which is tracked in the applicant's history.

The card window also displays the type of applicant (re-assign or applicant) and the applicant's previous application history.

Expanded Applicant View

Each applicant row in the search results table can be expanded to allow you to view more information about the selected applicant. In fact, the expanded row provides access to all the information found in the tabs on the *Applicant Detail* page.



To expand an applicant, click the arrow icon on the far right of the row. The row expands to display the detail tabs, which you can then click through and view the additional information.

Applicant Detail

The *Applicant Detail* page provides access to the current information for the selected applicant, including their history of previous applications to job postings.

The page is divided into areas to help provide quick access to the information you need.

Correspondence sent directly to the applicant are sent from this area as well.

[Click here for more information about Messages and Tasks.](#)

Notes

The **Notes** area is where users are able to view and add notes about the applicant. You can select to view either [Global and Internal notes](#).

Additional Information

Several tabs are used to present other applicant information:

- **Documents.** This tab shows all documents related to the application. The tab contains two sub-sections:
 - **Application Forms.** Contains documents and forms uploaded by the applicant or a hiring manager during the application and review process.
 - **Additional Documents.** Contains other documents uploaded or saved to the application by recruiters and hiring managers.
- **History.** This contains a full history of the applicant. This tab contains three sub-sections:
 - **Additional Applications.** Displays other applications the applicant has submitted.
 - **Status History.** Displays the date and time of each time the status of the application is updated.
 - **Edit History.** Displays all changes that have been made to the application since it was submitted.
- **Screening.** This tab displays all available screening information for the applicant, such as Background, Assessment, and Reference Check reports.
- **New Hire.** Once an applicant has moved to the "File - Hired" status, the New Hire tab appears and the *New Hire* form can be completed. This includes data such as start date, orientation date/time, starting salary, etc.

If your system is configured with Onboarding, the New Hire tab also contains an Onboarding table, which contains onboarding documents that have been assigned to the applicant.

Sidebar

Located on the right side of the page is a **Requisition Details** area that provides a brief overview of the job the applicant has applied for. This allows you to quickly compare the applicant's information against the requirements of the position.

There is also a list of **Other Applicants** that have submitted an application for the current requisition, organized by the applicant status.

New Hires

The *New Hires* page under **People** provides quick and easy access to those applicants that have been selected for hire for a job opening. This helps users quickly locate those applicants marked for hire that require further onboarding activities to complete the hiring process.

Note: Onboarding is an optional feature in Position Manager. However, the New Hire page is still available even if your system is not enabled with Onboarding.

Where the *Applicants* page lists every application submitted for each requisition that has been posted on a job board, the *New Hires* page only lists those applicants that have been chosen for hiring.

The *New Hires* page only lists those applicants that have been moved to the following statuses:

- **File - Hired.** The applicant has been chosen for hire. No indication has been made as to whether or not the applicant requires onboarding activities. For systems that do not use Onboarding, this is the final status for a hired applicant.
- **File - Hired - OB Needed.** The applicant has been chosen for hire, but has yet to be assigned any documents for completion.
- **File - Hired - In process.** The applicant has been sent the necessary onboarding documents. The system is waiting for the applicant to complete the assigned documents, or for the necessary Position Manager users to approve (close) those documents.
- **File - Hired - Finished.** The applicant has completed the onboarding documents, and the necessary Position Manager users have approved (closed) those documents.

Managing New Hires

The main *New Hires* page provides a table view of applicants with relevant statuses in the system. From this table, you can view basic information and perform actions on multiple new hires at once.

The New Hires table can be filtered using the **Search** panel to the left of the page and sorted by clicking on any of the available column headings.

Clicking the link under the "Name" column opens the *New Hire Detail* page for the selected applicant.

Talent Pool

Talent Pool is a way for organizations to keep records of passive candidates in Position Manager. Target searches can be performed on this list of candidates to find those that meet necessary requirements for positions.

Candidates can be added to the Talent Pool through a variety of means, such as an application for an opening that they were not hired for, added to the system by a user, or imported from another talent management system (such as with HRIS imports).

The *Talent Pool* page provides an experience on par with that of the *Applicants* and *New Hires* pages in Position Manager. Users are able to search for candidates, update their status and disposition, send correspondence, and add notes to candidate profiles. These actions are available from both the main (*Manage*) page as well as the *Detail* page.

Since the **Status** and **Disposition** fields are customizable, there is no workflow associated for these fields (as there is with Applicants and New Hires).

Reviewing an Applicant

Applicants in Position Manager are reviewed by both recruiters and hiring managers. A recruiter initially reviews applications as they are submitted for specific job postings. The recruiter then passes selected applications on to the hiring manager associated with the posting for review.

Recruiter Review

An applicant review performed by a recruiter is nothing more than viewing an application submitted to a job posting to determine if the applicant meets the necessary requirements.

This review is conducted by viewing applications submitted to a specific requisition. Recruiters can access the applications straight from the [Dashboard](#), or they can [perform a search](#) on the *Applicants* page in order to narrow down the list of applications so they only see the ones they are interest in reviewing.

Manager Review

Managers conduct applicant reviews when they have been sent to them by a recruiter. Often, recruiters request a response to a message about an applicant (in the form of a message and/or assigning a task) so they know the manager has reviewed the information.

After a manager reviews an applicant, the next step is usually asking the recruiter to schedule further interviews, or reject the client from consideration.

Updating Applicant Status

As an applicant moves through your hiring process, the status is updated to reflect its position in the process. The status of an applicant can be updated at any time.

Applicant status can be updated directly from the *Applicant Detail* page. You can also update the status of an applicant while performing other actions, such as sending an applicant for review.

These steps are taken from the *Applicant Detail* page. This action can also be taken from the main *Applicants* page as a batch action.

-
1. From the *Applicant Detail* page, Select the *Update Status* option from the **Take Action** drop-down list.
 2. In the *Update Status* pop-up window, select the new status from the available drop-down list.
 3. If desired, click the **Add Note** link to add Global and/or Internal Notes.
 4. Click the **OK** button to finalize the status change.

Clicking the **OK** button reloads the page, and a message displays stating the applicant status has successfully been changed.

The **Applicant History** tab found on the *Applicant Details* page displays the status change.

About Custom Forms

Custom forms are questionnaires sent to managers or other users for the purposes of reviewing an applicant. Generally these forms contain questions about the applicant based on a interview or meeting internal transfer requirements. The person receiving the form completes the requested information.

Note: Custom forms are sent to internal users of Position Manager; they are not sent to applicants.

Custom Form Details

Custom forms are sent using either the *Send Application to Manager* or *Send Custom Form to Manager* option from the **Take Action** drop-down list.

To complete custom forms, users visit the Messages and Tasks table and select the link for the custom form assigned to them.

The form itself is controlled from the *Questionnaires* page under the **Admin** area. Here you are able to determine what questions appear on the form for the user to complete.

Completing a Custom Form

When a custom form is sent to you for completion, you receive an email notification that contains the name of the applicant you need to review and a link to the main login page for your Position Manager site.

These steps are taken from the *Applicant Detail* page.

1. Locate the task for the custom form in the Messages and Tasks table and click the **Custom Form** link. This opens the *Custom Form* pop-up window.

Custom Form ✕

[Print](#)

QuestionI

☒ QuestionICorrectAnswer
☐ QuestionIWrongAnswer

QuestionII

☒ QuestionIICorrectAnswer
☐ QuestionIIWrongAnswer

QuestionIII

QuestionIV

2. Complete the available questions on the form.
3. When finished with the form, click the **Submit** button.

Clicking the **Submit** button saves the custom form with the answers you provided. Any task associated with the completion of the form is automatically marked as Complete. The form is added to the **Documents** tab for future review.

Sending a Custom Form

Custom forms are used to gather applicant evaluation information from other users of Position Manager. These forms are usually completed by managers.

These steps are taken from the *Applicant Detail* page.

1. Select the *Send Custom Form to Manager* option from the **Take Action** drop-down list. The *Send Custom Form to Manager* pop-up window opens.

Send Custom Form to Manager

Applicant Name: Hussam Zawil

Current Status: Active - Send to Manager

* Update Status to:

Active - Send to Manager

* Select Form (s):

☐ Custom Form
 ☐ QA Custom Questionnaire

* Send To:

Hiring managers who have access to this Application:

☐ Manager, HCS
 ☐ HiringManager, QA (assigned)

* From:

Recruiter, QA

☐ Send notification email
 ☐ Mark as Task for Hiring Manager(s)

+Add Note

Send

Cancel

- Complete the fields in the pop-up window as necessary.

Click here for a description of the available fields.

Update Status to. Provides options to update the status of the custom form.

Select Form(s). Custom forms that are available to send to the manager are listed here. Checking off forms in this area sends them to the selected manager(s) for completion.

Send To. Determines who receives the custom form. Only managers that have access to the application are listed.

From. Determines which user the custom form is sent from. This field can be configured to automatically default to the recruiter assigned to the requisition. Additional selections can be made using the **User Lookup**.

Mark as Task. If selected, this option creates a task to complete the selected form(s) for the managers listed in the **Send To** field.

Add Note. Clicking this link displays the two text fields used to add Global and Internal notes to the applicant.

3. When finished with the form, click the **Send** button. The pop-up window closes and the *Applicant Detail* page reloads and displays the updated information.

Clicking the **Send** button reloads the page and displays a message stating the form was successfully sent. The selected managers receive a notification regarding the custom form. If selected, tasks are created in the Messages and Tasks table.

Alternate Method - Send Application

Another way to send a custom form is using the [Send Application to Manager](#) action. In this pop-up window, there's a section that allows you to choose which forms you want the manager to complete. This method also includes the ability to create a task to complete the form for the manager(s).

Send Application to Manager

Applicant Name: Rob Solomons

Current Status: **File - Hired**

Update Status:

File - Hired

* Notification Method:

Email Link

* Send To:

HiringManager, QA

* From:

Recruiter, QA

* Subject:

Please Select

Message:

☒ Mark as Task for Hiring Manager(s)

Documents

Make the following documents visible to Manager(s) who have access to this Applicant:

Application Forms | Additional Documents

<input type="checkbox"/>	Date	Document Type	Document Name	Added by
<input type="checkbox"/>	12/19/2013...	Acknowledgement	Acknowledgements	
<input type="checkbox"/>	12/19/2013...	Background Check	Background Check Autho...	

1

Page 1 of 1

Displaying items 1 - 2 of 2

Forms

Include the following forms for the Hiring Manager(s) to complete:

☐ Custom Form
 ☐ QA Custom Questionnaire

☐ Mark as Task for Hiring Manager(s)

+Add Note

Send

Cancel

About Documents (Applicant)

When working with applicants in Position Manager, several types of documents can be attached to an application for reference purposes.

The **Documents** tab in the Additional Information area of the *Applicant Detail* page displays all documents attached to the application.

Document Types

There are three types of documents associated with applicants:

-
- **Application forms.** These are forms that are completed by the applicant during the application process.
 - **Template documents.** These are documents based on communication templates.
 - **Uploaded document.** These are files that are uploaded from your local computer.

Files that are uploaded from local computers can be a wide range of formats. These files can be downloaded for viewing and/or printing.

Documents that have been added using a communication template are usually sent to the applicant as a correspondence or email. These items can be edited directly in Position Manager and sent to applicants. In order to save this type of document to an application, it must already exist on the *Communication Templates* page under the **Admin** area.

Document Visibility

There are some documents and reference items that you might not want every manager to see. That's why we have a document visibility setting available. This allows you to either hide or show documents to any user that has access to the applicant. [More on this feature can be found here.](#)

Adding a Document

Documents can be added to an application for reference purposes. You can upload a document from your computer or save a document to the application using an available communication template from the system.

There are two ways to add documents to an application: upload a file from your local computer, or add a document from a communication template in the system.

All instructions below take place from **Documents** tab on the *Applicant Details* page. Make sure the **Additional Documents** link is selected.

Add Document from Computer

Note: Attachments are limited to files type of .doc, .docx, .pdf, .htm, .html, .rtf, .txt, .xls, .xlsx, .ppt, .pptx.

Note: There is a limit to the size of files you can attach to an application. The allowable file size for each client is configurable - please check with your system administrator to determine your site's limits.

1. Click the **Add Document from Computer** button above Documents table. The *Add Document from Computer* pop-up opens.

Add Document(s) From Computer

Applicant Name: Hussam Zawil

Current Status: Active - Send to Manager

You can attach up to 1 documents to this application. Note, the maximum file size is 5MB per file.
Acceptable file formats: .doc,.docx,.pdf,.htm,.html,.rtf,.txt,.xls,.xlsx,.ppt,.pptx,.gif,.jpg,.jpeg,.bmp,.png,.img,.tif

Upload Document

HCS_TestDocument.docx

Documents

Make Document visible to the following Manager(s) who have access to this Applicant:

☒ Manager, HCS

☐ HiringManager, QA (assigned)

☒ Send notification email

Save

Cancel

Tip: You can also select the *Add Document from Computer* option from the **Take Action** menu.

- Click the **Upload Document** button.
- Browse for the document you wish to upload on computer.
- Check the box for the managers you wish to see the new document.

Note: Only managers that have access to the applicant appear as options.

- Check the **Send notification email** option if you wish to notify the selected managers that a new document has been uploaded.
- Click the **Save** button.

Add Document from Template

- Click the **Add Document from Template** button above Documents table. The *Add Document from Template* pop-up opens.

Add Document From Template

Applicant Name: Hussam Zawil
Current Status: Active - Send to Manager

* Select a Template: Documents Sample

Name: Thank you letter

Source

B I U S X₂ X₂

Styles

Format

Font

Size

Thank you for your response to our job posting. After review of your experience, it has been determined to continue seeking someone for the position who more closely meets all our requirements Again, thank you for your interest in our employment opportunities. Sincerely, Human Resources

Characters: 0

Documents
Make Document visible to the following Manager(s) who have access to this Applicant:

- ☒ Manager, HCS
- ☐ HiringManager, QA (assigned)
- ☒ Send notification email

Save Cancel

Tip: You can also select the *Add Document from Computer* option from the **Take Action** menu.

2. Select a template from the drop-down list.
3. Type in a **Name** for the document, if necessary.
4. Make edits to the document text in the text editor as necessary.
5. Check the box for the managers you wish to see the new document.



Note: Only managers that have access to the applicant appear as options.

6. Check the **Send notification email** option if you wish to notify the selected managers that a new document has been added.
7. Click the **Save** button.



In both methods, the page reloads after the **Save** button is clicked and a message displays that states the document has been successfully saved to the application(s). The document now appears in the Document table under the **Additional Documents** heading.

DocumentsHistoryScreeningApplicationNew Hire



Application Forms | Additional Documents



DATE	DOCUMENT TYPE	DOCUMENT NAME	ADDED BY
05/14/2012	Template	Documents Sample	Recruiter, HCS
05/14/2012	Uploaded File	HCS_TestDocument.docx	Recruiter, HCS



1



Page 1 of 1

Displaying items 1 - 2 of 2

Deleting a Document

Documents that have been attached to an application can be deleted. Deleted documents can not be recovered.

These steps take place from the **Documents** tab on the *Applicant Detail* page.

- 1. Check the box next to the document(s) in the table you wish to delete.
- 2. Select the *Delete Document* option from the **Take Action** drop-down list. A confirmation dialog will open asking if you are sure you wish to delete the selected document(s).
- 3. Click the **OK** button.

Clicking the **OK** button deletes the selected documents from the application. The *Applicant Detail* page reloads and displays a message stating the selected document(s) were successfully deleted.

Alternate Method

Documents that are added to an application from a template can be deleted from the window that opens when you click the link in the "Name" column. The pop-up preview window contains several options, one of which is a **Delete** button.

Thank you for applying



EditDeleteEmailPrint

Preview

Thank you for your response to our job posting. After review of your experience, it has been determined to continue seeking someone for the position who more closely meets all our requirements Again, thank you for your interest in our employment opportunities. Sincerely, Human Resources

Documents table

The **Documents** tab on the *Applicant Detail* page displays all the documents attached to the application.

Additional Information			
Documents	History	Screening	New Hire
Application Forms Additional Documents			
 			
DATE	DOCUMENT TYPE	DOCUMENT NAME	ADDED BY
07/31/2012	Background Check Document	Background Check Form	
08/02/2012	Applicant Correspondence	Thank you for applying	Recruiter, QA
08/02/2012	Template	This	Recruiter, QA
08/02/2012	Uploaded File	HCS_TestDocument.docx	Recruiter, QA
<div>Page 1 of 1</div> <div>Displaying items 1 - 4 of 4</div>			

There are two links available above the table to help organize the documents:

- **Application Forms.** Application forms are items that are completed during the application process. They can include application questionnaires, custom forms, acknowledgments, etc.
- **Additional Documents.** Additional documents are files that have been added to the application by the applicant during the application process (such as resumes or references) or by users of Position Manager that have access to the applicant.

The tables display the date the item was added to the application, the type of document and the name of the document. The “Name” column appears as a link that opens the document in a preview window when clicked - or, in the case of documents uploaded to the system, offers the option to download the file to your local computer.

The Additional Documents view also has an “Added By” column that shows which user uploaded or saved the document to the application.

Document Visibility

Document visibility refers to whether or not a specific user has access to a document attached to an application. Position Manager allows you to determine which documents are available to which users.

Setting Document Visibility

Documents are made visible to users when they are added to the application, or when an applicant is sent to a manager for review.

When adding a new document, recruiters can select which manager that has access to the applicant will be able to see the new document.

Add Document(s) From Computer

Applicant Name: Hussam Zawil

Current Status: Active - Send to Manager

You can attach up to 1 documents to this application. Note, the maximum file size is 5MB per file.
Acceptable file formats: .doc,.docx,.pdf,.htm,.html,.rtf,.txt,.xls,.xlsx,.ppt,.pptx,.gif,.jpg,.jpeg,.bmp,.png,.img,.tif

Upload Document

HCS_TestDocument.docx

Documents

Make Document visible to the following Manager(s) who have access to this Applicant:

☒ Manager, HCS

☐ HiringManager, QA (assigned)

☒ Send notification email

Save

Cancel

Alternately, when sending an applicant to a manager for review, there is a section that lists all of the documents currently attached to the application. Checking off these documents makes them visible to the managers selected to receive the application.

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Send Application to Manager

Applicant Name: Rob Solomons

Current Status: File - Hired

Update Status:

File - Hired

* Notification Method:

Email Link

* Send To:

HiringManager, QA

* From:

Recruiter, QA

* Subject:

Please Select

Message:

☒ Mark as Task for Hiring Manager(s)

Documents

Make the following documents visible to Manager(s) who have access to this Applicant:

Application Forms | Additional Documents

<input type="checkbox"/>	Date ▲	Document Type	Document Name	Added by
<input type="checkbox"/>	12/19/2013...	Acknowledgement	Acknowledgements	
<input type="checkbox"/>	12/19/2013...	Background Check	Background Check Autho...	

Page 1 of 1

Displaying items 1 - 2 of 2

Forms

Include the following forms for the Hiring Manager(s) to complete:

☐ Custom Form
 ☐ QA Custom Questionnaire

☐ Mark as Task for Hiring Manager(s)

+Add Note

Send

Cancel

Future Functionality

Development efforts are underway to add functionality to the Documents table on the *Applicant Detail* page that will allow recruiters to view which users have access to each document listed in the table. They will also be able to change the visibility settings for each document directly from the same table.

Keep an eye out for more information about this upcoming feature!

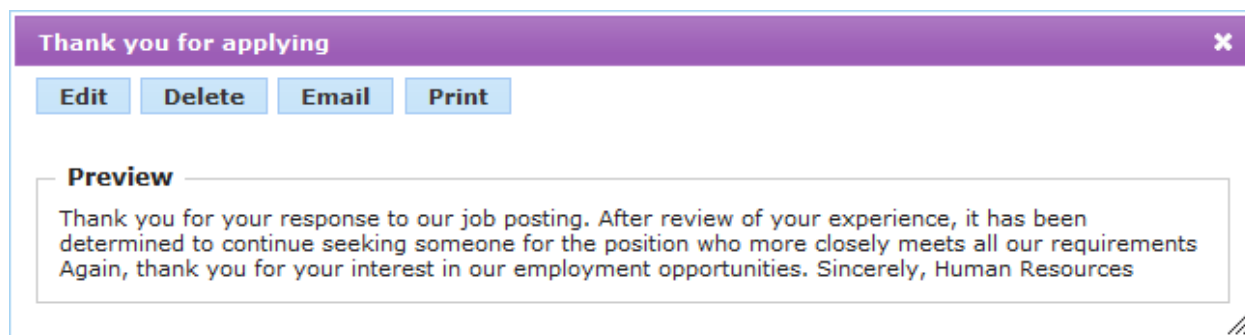
Editing Documents

Documents that are added to an application using a communication template (as opposed to being uploaded as a file from a local computer) can be edited at any time.

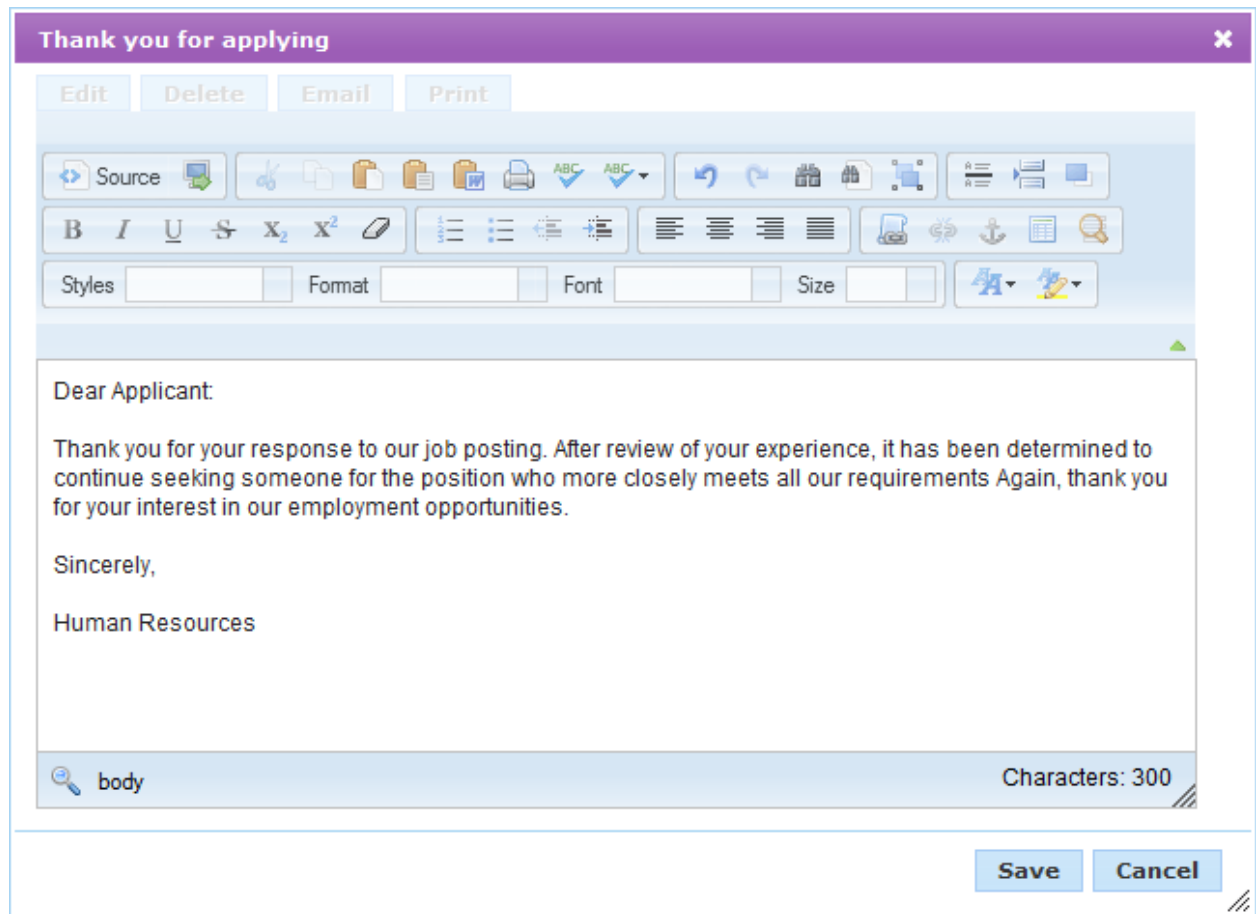
Documents uploaded from a computer cannot be edited in Position Manager. To edit these documents, you must download a copy of the document, make necessary edits, then re-upload it as a new document.

These steps take place from the **Documents** tab on the *Applicant Detail* page.

1. Click the link under the "Name" column for desired document. The document opens in a pop-up window.



2. Click the **Edit** button. The document opens in a text editor.
3. Make necessary changes to the document.



4. Click the **Save** button.

Once the **Save** button is clicked, the pop-up window closes and the changes are saved to the document.

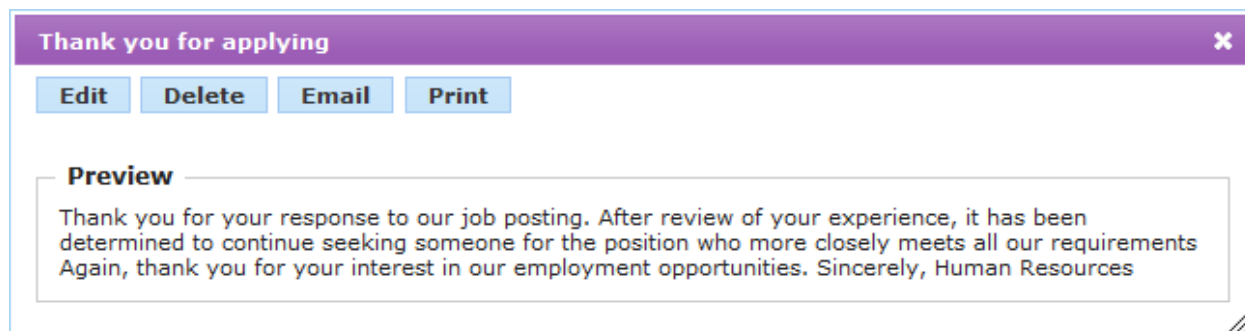
Emailing a Document

Documents added to an application from a communication template can be emailed to an applicant or any entered email address.

Only documents added to an application from a template can be emailed to applicants. Documents uploaded from your computer cannot be emailed.

These steps take place from the **Documents** tab on the *Applicant Detail* page.

1. Click the link under the "Name" column for desired document. The document opens in a pop-up window.



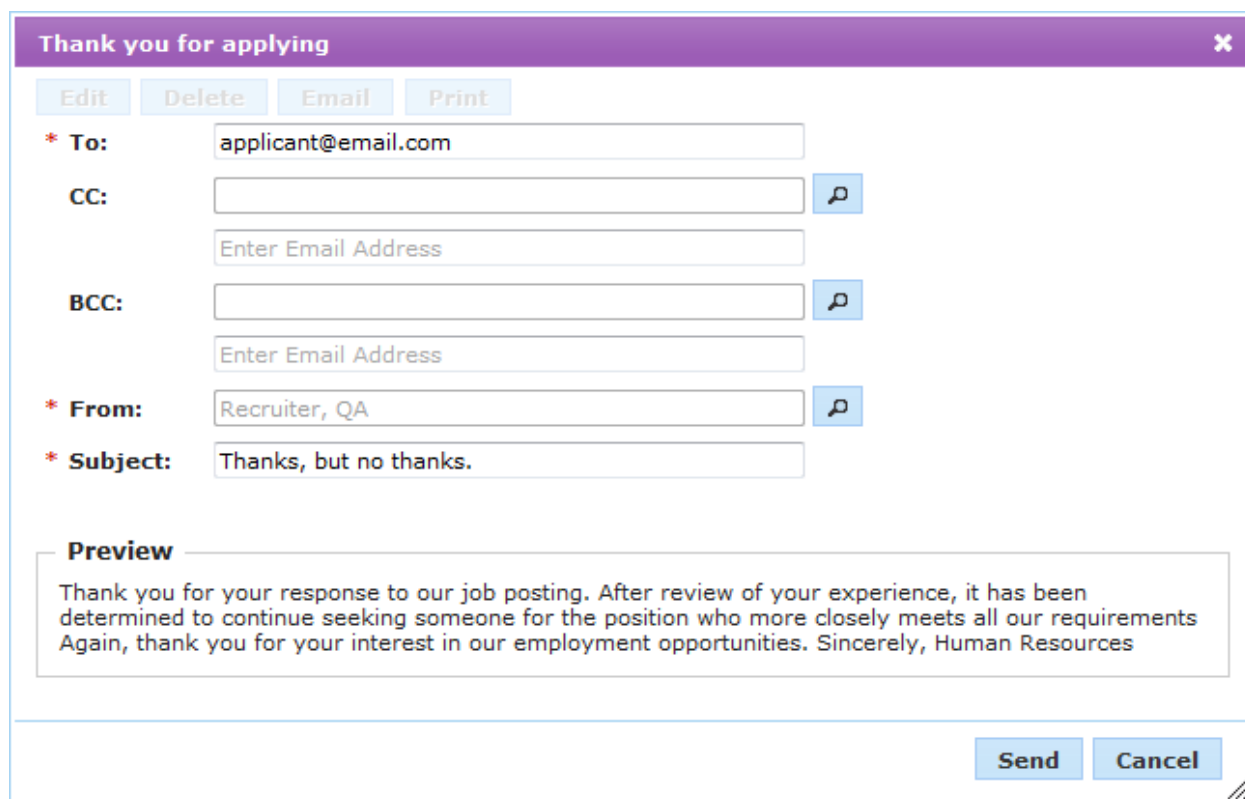
Thank you for applying [X]

[Edit](#) [Delete](#) [Email](#) [Print](#)

Preview

Thank you for your response to our job posting. After review of your experience, it has been determined to continue seeking someone for the position who more closely meets all our requirements. Again, thank you for your interest in our employment opportunities. Sincerely, Human Resources

2. Click the **Email** button. The pop-up reloads to display additional fields.



Thank you for applying [X]

[Edit](#) [Delete](#) [Email](#) [Print](#)

* **To:**

CC: [P]

BCC: [P]

* **From:** [P]

* **Subject:**

Preview

Thank you for your response to our job posting. After review of your experience, it has been determined to continue seeking someone for the position who more closely meets all our requirements. Again, thank you for your interest in our employment opportunities. Sincerely, Human Resources

[Send](#) [Cancel](#)

3. Complete the fields in the pop-up window as necessary.
4. Click the **Send** button.

Once the **Send** button is clicked, the email is sent to the entered recipients.

About Hiring Applicants

When your search for an applicant is over, it's time to bring them on board. Hiring an applicant is an easy wizard-driven process that walks you through the steps of updating applicants and marking requisitions as filled.

Editing New Hire Information

As part of the hiring process for an applicant, the new hire form is completed from within the hiring wizard. However, edits may be made to the new hire form at any time.

Users must have the necessary permissions to edit the new hire form.

These steps take place from the *Applicant Detail* page.

1. Click the **New Hire** tab in the Additional Information section. The form automatically opens in edit mode.

The screenshot shows a web application window titled 'Additional Information'. It has four tabs: 'Documents', 'History', 'Screening', and 'New Hire'. The 'New Hire' tab is selected. The form contains the following fields and sections:

- Job Title**: A text field.
- Job Code**: A text field with the value 'CRNA-2011'.
- Requisition Number**: A text field with the value '1002'.
- FTE**: A text field with the value '2.1'.
- Date Job Opened**: A text field.
- Date Job Posted**: A text field.
- Date Job Filled**: A text field.
- New Hire Data**: A section containing:
 - First Name**: A text field.
 - Last Name**: A text field with the value '8/30/2012 12:04:08 AM'.
 - Applicant Source**: A dropdown menu with 'Please Select'.
 - Date of Hire**: A date picker.
 - Date of Physical**: A date picker.
 - Middle Initial**: A text field with the value '617-610-5158'.
 - Time of Physical**: A text field.
- Orientation 1**: A section containing:
 - Orientation Type**: A dropdown menu with 'Please Select'.
 - Orientation Date**: A date picker.
 - Orientation Time**: A text field.
 - Start Date**: A date picker.
 - Supervisor's Name**: A text field.
 - Salary Offered**: A text field.
 - Phone Number**: A text field.
- Sign-On Bonus**: A section with a text field.

2. Enter the necessary information into the new hire form.
3. When finished entering necessary information, click the **Save** button.

Clicking the **Save** button reloads the page and displays a message stating the information was successfully updated.

Hiring an Applicant

When your search for a qualified applicant has ended, it's time to hire the selected candidate.

These steps are taken from the *Applicant Detail* page.

Note: Depending on available permissions for a user and overall system settings, not all of the steps shown here may be available.

To get started, select the *Hire Applicant* option from the **Take Action** drop-down menu. The new hire wizard launches and displays the first step of the process, **New Hire Information**.

1. **New Hire Information.** The first step of the process involves completing the New Hire form for the hired applicant. Though these forms are customizable, they usually contain compensation information for the new hire (referral, signing bonuses, etc.).

New Hire Information details

New Hire Wizard

Applicant Name: BRUCE LEE Status: **File-Hired**

Job Title Job Code Med108-2010

Requisition Number Date Job Opened

FTE Date Job Posted

New Hire Data Date Job Filled

First Name: Bruce Middle Initial:

Last Name: Lee

Applicant Source: Please Select

Date of Hire: 9/21/2012 Time of Physical:

Date of Physical: 9/13/2012

Orientation 1 Orientation Date:

Orientation Type: Nursing Orientation Time:

Start Date: Salary Offered:

Supervisor's Name: Phone Number:

Sign-On Bonus Sign-on Bonus Date Paid:

Sign on Bonus: Referral Bonus Date Paid:

Referral Bonus Relocation Bonus Date Paid:

Referring Employee Name: Relocation Bonus Amount \$:

Referring Employee Phone #: Relocation Bonus Date Paid:

Referring Employee Department: Relocation Bonus Date Paid:

Referral Bonus: Relocation Bonus Date Paid:

Relocation Bonus

Relocation Bonus Amount \$: Relocation Bonus Date Paid:

Relocation Bonus Date Paid:

Cancel Next

- a. Complete all the necessary fields on the new hire form.

Note: New hire forms are customizable, so the list of available fields in this section will vary from client to client. These fields are set based on the data your organization requires for new hires.

- b. Click the **Next** button to advance to the next step of the new hire wizard.

2. **Onboarding.** The Onboarding step, available only if your system is configured to use onboarding, allows you to assign documents to the selected applicant. These documents can be forms that need to be completed by the applicant, or simple informational documents, such as benefits explanations.

Onboarding details

New Hire Wizard

New Hire Information | **Onboarding** | Select New Hire Letter | Additional Applicants | Attach Documents

Applicant Name: asha_12 Ramadas_12 | **Status:** File-Hired

Does this new hire require onboarding? ☒ Yes ☐ No

Assign onboarding documents now? ☒ Yes ☐ No

Add Document Group: QA Group 2

Add Document(s)

Sequence	Document Name	From Group	Remove
1	Payroll	QA Group 1	X
2	Employee Benefits Enrollment	QA Group 2	X
3	Confidentiality Agreement	QA Group 2	X
4	Drug Free Information	QA Group 2	X

Cancel | Previous | Next

- a. Select if the new hire requires onboarding. If *No* is selected for this option, all remaining options for the onboarding step are removed and you can advance to the next step in the wizard.
- b. Select if you wish to assign onboarding documents at this time. If *No* is selected for this option, all remaining options for the onboarding step are removed and you can advance to the next step in the wizard.
- c. Select a group of documents to assign to the applicant from the **Document Group** drop-down menu. This populates the document table with the documents in the selected group.

Note: You can remove any single document from the table by clicking the **X** under the Remove column.

- d. If you wish to add an additional document to the applicant that is not part of a document group, click the **Add Document** button and select from the available list of documents.
 - e. If necessary, you can change the order in which the list of documents displays to the applicant by clicking in the far-left column of each item to drag-and-drop the documents into the desired order.
 - f. Click the **Next** button to advance to the next step of the new hire wizard.
3. **Select New Hire Letter.** This step allows you to send a confirmation letter to the new hire. The letter is based off an existing communication template in the system, but can be edited as necessary before sending. Though this step always appears in the wizard, it is not necessary to send a letter to the applicant at this time.

Select New Hire details

New Hire Wizard

Applicant Name: BRUCE LEE Status: File-Hired

☒ Send New Hire Letter

Select a Template: Applicant Correspondence Email Sample

CC: Zawil, Hussam

BCC:

* From: Support, HCS

* Subject: Thank you for applying BRUCE LEE.

Message:

Dear BRUCE LEE,

Thank you for applying to our Charge Nurse. Congrats, you have been chosen for employment!

body Characters: 105

☒ Save as Document

* Document Name: Applicant Correspondence Email Sample

+Add Note

Previous Cancel Next

- a. Choose an option from the **Select a Template** drop-down list. The **Subject** and **Message** fields pre-populate based on the selected template.

Note: It is not necessary to select a template to send a letter. You can manually enter a **Subject** and **Message**.

- b. In the **CC** and **BCC** fields, select a user with the user lookup, or type in an email address for additional recipients.
 - c. Select users with the user lookup for the **From** field. This field defaults to the current user, so edits may not be necessary.
 - d. Edit the **Subject** as necessary.
 - e. Edit the **Message** of the email as necessary.
 - f. Select the **Save as Document** option if you wish to save the email as a document in the applicant records. If this option is selected, you must enter a **Document Name** in the available text field.
 - g. Click the **Add Note** link if you wish to add Global and/or Internal notes on the applicant.
 - h. Click the **Next** button to advance to the next step of the new hire wizard.
4. **Additional Applications.** If the new hire has additional applications in the system for other open positions, this step allows you to update the status and disposition of those applications.

Additional Applications details

New Hire Wizard

Applicant Name: BRUCE LEE Status: File-Hired

Update the Status and Disposition of additional applications for BRUCE LEE

These are additional applications that BRUCE LEE has applied to that are still in a New or Active status.

Batch Update

TRACKING ID	POSITION	APPLY DATE	STATUS	DISPOSITION	NOTES
213	Allied Health Nurse, 1002	08/30/2012	File - Not Hired...	Interviewed - a...	
221	Charge Nurse, REQ-4	08/30/2012	File - Not Hired...	Offer Declined	

Page 1 of 1

Displaying items 1 - 2 of 2

Previous Cancel Next

- a. Select the check boxes next to the applications you wish to update.
- b. Select a new **Status** from the available drop-down list for each application you wish to update.
- c. Select a **Disposition** from the available drop-down list for each application you wish to update.

Note: Collecting a disposition is an option based on site settings. This field may not appear in your system, or it might be a required field when updating the status of an application.

- d. If necessary, click the icon under **Notes** to add Global and/or Internal notes for the application.
- e. When finished updating the available applications, click the **Batch Update** button.
- f. Click the **Next** button to advance to the next step of the new hire wizard.

5. **Additional Applicants.** Similar to the previous step, the final step in the new hire wizard allows you to batch process any additional applicants to the requisition you are hiring for.

Additional Applicants details

New Hire Wizard

Applicant Name: BRUCE LEE Status: File-Hired

Update the Status and Disposition of additional applicants for: Charge Nurse, REQ-44

These are additional applicants that applied to this position.

Batch Update

	NAME	LETTER	STATUS	DISPOSITION	NOTES
Active - Interview					
<input type="checkbox"/>	Tyler, Tiffany	-Select-	Active - Interview	Please Select	
New					
<input type="checkbox"/>	Bonilla, Moses	-Select-	New	Please Select	
<input type="checkbox"/>	Dalton, Lesley	-Select-	New	Please Select	
<input type="checkbox"/>	Schaefer, Bryce	-Select-	New	Please Select	
<input type="checkbox"/>	Steele, Gary	-Select-	New	Please Select	

Page 1 of 1

Displaying items 1 - 5 of 5

Previous **Cancel** **Finish**

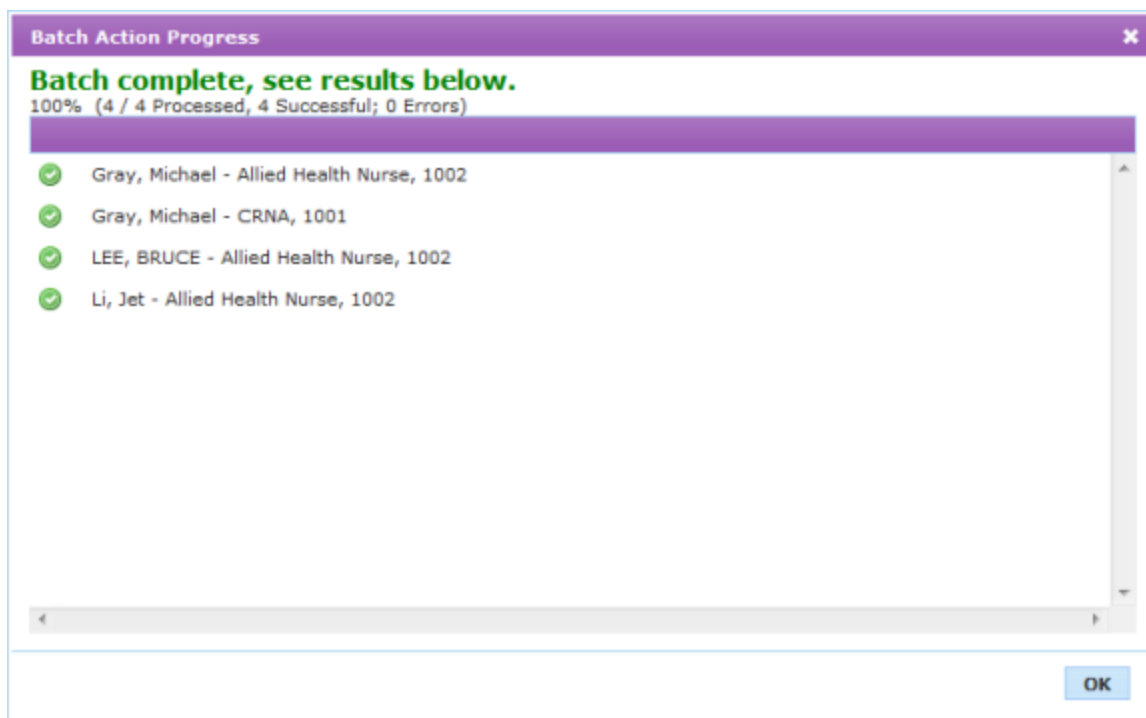
- a. Select the check boxes next to the applicants you wish to update.
- b. Click the **Select** link if you wish to send a letter to the applicant. This opens a pop-up window with letter selection options similar to those found in Step 2 of the wizard.
- c. Select a new **Status** from the available drop-down list for each applicant you wish to update.

- d. Select a **Disposition** from the available drop-down list for each applicant you wish to update.

Note: Collecting a disposition is an option based on site settings. This field may not appear in your system, or it might be a required field when updating the status of an application.

- e. If necessary, click the icon under **Notes** to add Global and/or Internal notes for the application.
- f. When finished updating the available applicants, click the **Batch Update** button.
- g. Click the **Finish** button.

Clicking the **Finish** button completes the hiring process. If any batch actions were taken against additional applications and/or applicants, a window appears that shows the progress of these batch actions.



Once the batch actions have completed, closing the window takes you back to the *Applicant Detail* page, where the status has been updated.

Several other actions occur when the hiring process is complete:

- The **New Hire** tab on the *Applicant Detail* page becomes active.
- The **History** tab displays the changes to the current and any additional applications for the applicant.
- The status of the associated requisition is changed from "Active" to "Filled".
- The associated job posting is removed from all career sites.

Note: Once an applicant has been moved to a status of "File - Hired", you cannot update their status using the usual methods (*Change Status*, *Send to Manager*, etc.). You must use the [Unhire Applicant](#) action to make any changes to the applicant status.

Replacing a Hired Applicant

Replacing a hired applicant in Position Manager occurs when you attempt to change the status of an applicant to "File - Hired" when there is already an applicant in that status for the associated requisition.

The system notifies you of the status conflict when you attempt to make the change, allowing you to cancel the change if it was performed by mistake.

However, there may be cases when it is required to replace a candidate that has already been updated to "File - Hired". The procedure for such cases is listed below.

These steps take place from the *Applicant Detail* page.

1. Select the *Hire Applicant* option from the **Take Action** drop-down list. A pop-up window opens warning you that another applicant has already been hired for the requisition.
2. Click the **OK** button. The warning pop-up window closes and the new hire wizard launches.
3. Complete the new hire wizard as you normally would for a new hire.

[Click here for more information about the new hire wizard.](#)

Once you have completed the new hire wizard, the applicant is moved into a status of "File - Hired." The **New Hire** tab is available on their *Applicant Detail* page.

The applicant that was previously marked as "File - Hired" for the requisition is moved into a status of "File - Not Hired - Viable". Any information that was entered into the **New Hire** tab is removed, and the tab is inactivated.

The associated requisition remains in a status of "Filled".

Alternate Method

Another way to replace an applicant is to update the status of an applicant using one of the following options from the **Take Action** drop-down list:

- *Update Status*
- *Correspond with Applicant*
- *Send Application to Manager*

These actions all provide an area to update the status of the current applicant. If you chose to update the status to "File - Hired" when there is already an applicant with that status for the associated requisition, a warning message displays stating that you are replacing an existing applicant for the requisition.

If you continue with updating the status of the applicant, you reach the same results as before:

- The new applicant is moved to a status of "File - Hired" and the **New Hire** tab is activated.
- The previous applicant hired for the requisition is moved to a status of "File - Not Hired - Viable." All the information on their **New Hire** tab is deleted, and the tab is inactivated.
- The associated requisition remains in a status of "Filled".

Unhiring an Applicant

Applicants that have been hired in Position Manager can also be unhired if you need to change the applicant selected for the position. You are only able to unhire an applicant that has a current status of "File - Hired."

Users must have the necessary permissions to unhire an applicant.

These steps take place from the *Applicant Detail* page.

1. Select the *Unhire Applicant* option from the **Take Action** drop-down list. The *Unhire Applicant* pop-up window opens.
2. Select a new status for the applicant from the *Update to the following status* drop-down list.
3. Select a disposition for the applicant from the *Select Disposition* drop-down list.
4. If desired, click the Add Note link to add Global and/or Internal notes for the applicant.
5. Click the **OK** button.

Clicking the **OK** button closes the *Unhire Applicant* pop-up window, and a message displays stating the applicant status has successfully been changed. The **Applicant History** tab found on the *Applicant Details* page will display the status change.

Several other actions occur when the status is updated away from "File - Hired":

- Any data entered into the new hire form is deleted, and the **New Hire** tab will not be available.
- The status for the associated requisition is changed back to the previous status before the applicant was hired.

Note: If the requisition had a status of "Active - Posted" but the valid posting dates have passed, the requisition is moved to a status of "Active - Not Posted."

About Messages and Tasks

The Messages and Tasks table tracks communications between managers and recruiters regarding the selected applicant. It is also used to assign tasks to users when specific actions are required, such as completing a custom form or setting up an interview.

The table also includes an area in the table for sending correspondence directly to the applicant.

While the messaging capability is available on every installation of Position Manager, the tasks functionality can be turned on and off from the *Client Settings* page under the **Admin** area.

Table Layout

Messages and Tasks			
Internal Messages Applicant Messages			
ALL MESSAGES	DATE/TIME	TASKS	
<div> QA Recruiter to HCS Manager Top candidate Setting up an interview with this candidate. Can you please complete the forms? Reply Mark all tasks complete </div>	August 02, 2012 02:24 PM	HR	HM
<div> QA Recruiter Top candidate Setting up an interview with this candidate. Can you please complete the forms? Reply </div>	August 02, 2012 02:25 PM		
<div> QA Recruiter You have a Form to Complete Please click here to complete your form: Custom Form Reply Mark task complete </div>	August 02, 2012 02:25 PM		
<div> QA Recruiter You have a Form to Complete Please click here to complete your form: QA Custom Questionnaire Reply Mark task complete </div>	August 02, 2012 02:25 PM		
<div> QA HiringManager to QA Recruiter Schedule phone interview Looks good; please conduct a phone screen. Reply Mark all tasks complete </div>	August 01, 2012 06:11 PM	HR	HM
<div> <div> 1 2 </div> <div>Page 1 of 2</div> <div> </div> </div> <div>Displaying items 1 - 5 of 6</div>			

The Messages and Tasks table presents messages in a threaded form, with the most recent message shown at the top of the table. Header rows for message threads are colored yellow. The arrow icon to the left of the thread expands and collapses the message thread.

The first line of the header row shows which users are involved in the message thread. Each subsequent message row under the header row displays the user that sent the message.

If there is only one thread of messages, the thread is automatically expanded when the page opens. If more than one conversation thread exists, the one with the most recent message displays first in the table.

A filter is available at the top of the table that allows you to display *All Messages*, *Messages From Me*, or *Messages To Me*.

Table Views

There are two views of the Messages and Tasks table:

- **Internal Messages.** These are messages sent between recruiters and managers. This is the only view of the table that shows any tasks that have been assigned. This is the default view for the Messages and Tasks table.
- **Applicant Messages.** This view shows all correspondence that has been sent directly to the applicant from the system.

Tasks


Tasks are attached to specific messages sent between recruiters and managers and are indicated as icons in the messages table.

The far right side of the table shows the two task columns:



- **HR.** Hiring Recruiter. This column indicates a task assigned to the Recruiter. This column always displays in blue.
- **HM.** Hiring Manager. This column indicates a task assigned to the Manager. This column always displays in green.

Tasks are indicated using icons in the Messages and Tasks table. The icon appears in either the "HR" or "HM" column, depending on who the task was assigned to.

The following icons are used:

-  **Task assigned.** This icon indicates a task has been assigned to you. It is found in the task column of the row where the task was assigned to you.

The task icon found in the thread header row shows the number of incomplete assigned tasks for that thread in a red circle on the task icon.

-  **Task waiting.** This icon indicates a task has been assigned to another user and is awaiting completion.
-  **Task complete.** This icon indicates the assigned task has been completed.

Completing a task

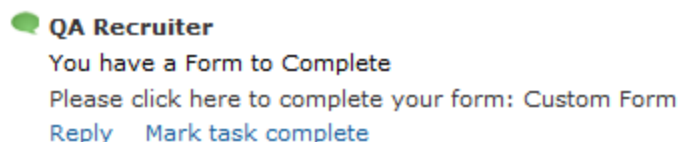
Tasks can be marked as complete in the Messages and Tasks table. Both the user assigning the task and the recipient have the ability to mark the task complete.

It is not necessary to mark tasks as complete to continue the progress of the applicant throughout the hiring process.

When completing custom forms as part of a task, the task is automatically marked as complete when the form is submitted. There is no need to manually mark the task as complete.

These steps are taken from the *Applicant Detail* page.

1. Locate the particular task in the message thread you wish to mark as complete and click the **Mark task complete** link. A confirmation pop-up window opens.



2. Click the **OK** button.

Clicking the **OK** button closes the pop-up window. The *Applicant Detail* page reloads and displays the updated information. The task now displays as complete.

If you closed the task via the **Reply** option, your new message appears in the table and the original task is marked as complete.

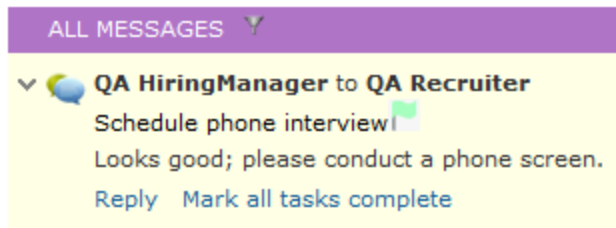
Alternate Methods

There are two alternate methods for completing tasks.

- **Reply link.** When you reply to the message, the pop-up window contains the option to mark the assigned task as complete.

A "Reply" pop-up window with a purple header and a close button (X). It contains fields for "To:" (QA HiringManager), "From:" (Recruiter, QA), and "* Subject:" (Re: Schedule phone interview). Below these is a "Message:" text area containing "Interview scheduled for Aug 12 at 10:30a.". At the bottom, there are two checkboxes: "Mark as Task for recipient" (unchecked) and "Close Task: Schedule phone interview" (checked). A blue question mark icon is next to the first checkbox. At the bottom right are "Send" and "Cancel" buttons.

-
- **Recruiters only.** Recruiters have an additional way to mark tasks as complete. Located in the header row for a message thread, the **Mark all tasks complete** link allows recruiters to do exactly that - mark all tasks that are open in that message thread as complete.



Clicking the link opens the same confirmation dialog as if you were to close a single task in the thread.

Corresponding with an Applicant

Position Manager provides the ability to send correspondence in the form of emails to applicants in your system. Any correspondence sent to an applicant is tracked in the Messages and Tasks table under the **Applicant Messages** link.

These steps are taken from the *Applicant Detail* page. This action can also be taken from the *Applicants* page as a batch action.

1. From the **Take Action** drop-down menu, select the *Correspond with Applicant* option. The *Correspond with Applicant* pop-up window opens.

Correspond with Applicant

Applicant Name: Hussam Zawil
Current Status: Active - Send to Manager

Update Status:
Active - Send to Manager

* Send To:
hussam.zawil@healthcaresource.com

Select a Template:
Applicant Correspondence Email Sample

CC:
Enter Email Address

BCC:
Enter Email Address

* From:
Recruiter, QA

* Subject:
Thank you for applying Hussam Zawil.

Message:

Source
B I U S X₂ X₂
List
Table
Link
Image
Undo
Redo
Print
Find

Styles
Format
Font
Size

Dear Hussam Zawil, Thank you for applying to our Clin Eng Tech II.

Characters: 66

Save as Document
* Document Name:

+Add Note

Send Cancel

- Complete the fields in the pop-up window as necessary.

Click here for a description of the available fields.

Update Status. Provides options to update the status of the application.

Send To. Who the correspondence is being sent to. This text field defaults to the applicant email listed in the application, but can be updated or have additional emails entered in.

Select a Template. Drop-down list containing the available email templates for corresponding with an applicant. Selecting a template pre-populates the **Subject** and **Message** fields.

Note: Options available in the **Select a Template** drop-down list are controlled in the **Communication Templates** area under the **Admin** tab.

CC. Carbon copy. Allows you to add more recipients to the correspondence in the form of selected Position Manager users or typed-in email addresses.

BCC. Blind carbon copy. Allows you to add more recipients to the correspondence in the form of selected Position Manager users or typed-in email addresses. Recipients entered into the BCC field do not appear to other recipients of the correspondence.

From. Determines which user the correspondence is sent from. This field defaults to the user sending the message. Additional selections can be made using the **User Lookup**.

Subject. Text field for typing the subject of the correspondence.

Message. Text field for typing the body of the correspondence sent to the applicant.

Save as Document. Check this option if you wish to save the correspondence as a document for the applicant. The correspondence will be added to the **Additional Documents** view of the Documents table on the *Applicant Detail* page.

Document Name. If you choose to save the correspondence as a document for the applicant, use this text field to assign a name to the document.

Add Note. Clicking this link displays the two text fields used to add Global and Internal notes to the applicant.

3. When finished with the form, click the **Send** button.

Once the **Send** button is clicked, the pop-up window closes and the *Applicant Detail* page reloads and displays the updated information. The correspondence is sent to the entered email addresses.

Note: Replies to the correspondence **do not** appear in the Messages and Tasks table.

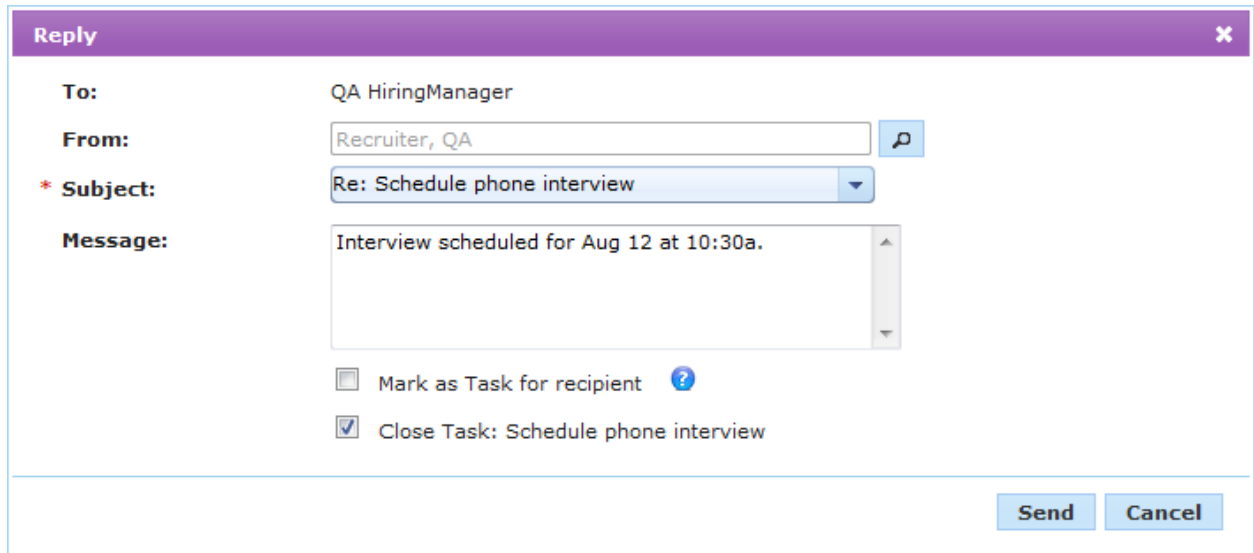
Replying to a message

Replying to messages in the Messages and Tasks table adds another row to the message thread. You can reply to individual messages in the thread, or to the entire thread in general.

Users can reply to both received and sent messages.

These steps are taken from the *Applicant Detail* page.

1. Locate the particular message in the thread you wish to reply to and click the **Reply** link. You can also reply to the entire thread by clicking the **Reply** link in the header row for the message thread. This opens the *Reply* pop-up window.



2. Complete the fields in the pop-up window as necessary.

Click here for a detailed description of the available fields.

To. Displays who will receive the message. Since this is a reply to a message, this field cannot be changed.

From. Determines which user the message is sent from. Additional selections can be made using the **User Lookup**.

Subject. Drop-down list showing the available subject lines for the email. You can accept the default Re: subject, select a new subject from the drop-down list, or type in text into the field.

Message. Text field for typing the body of the email.

Mark as Task. If selected, this option creates a task for the user listed in the **To** field.

Close Task. If you are replying to a message that assigned a task for you to complete, you can close that task by selecting this option.

Note: If you reply to a message with no tasks associated, the **Close Task** option does not appear.

3. When finished with the form, click the **Send** button.

Clicking the **Send** button closes the pop-up window and sends the message. The *Applicant Detail* page reloads and displays the updated information.

Selected recipients receive a notification about your reply. Any assigned tasks are noted in the new message row in the Messages and Tasks table.

Sending an application to Manager

Sending an application to a manager is part of the applicant review process in Position Manager. A recruiter reviews applications received from a job posting, then sends the most qualified applicants to managers for further review.

The *Send Application to Manager* pop-up window allows users to perform several actions at once for the selected application.

These steps are taken from the *Applicant Detail* page. This action can also be taken from the *Applicants* page as a batch action.

1. Select the *Send Application to Manager* option from the **Take Action** drop-down menu. The *Send Application to Manager* pop-up window opens.

Send Application to Manager

Applicant Name: Rob Solomons

Current Status: File - Hired

Update Status:

File - Hired

* Notification Method:

Email Link

* Send To:

HiringManager, QA

* From:

Recruiter, QA

* Subject:

Please Select

Message:

☒ Mark as Task for Hiring Manager(s)

Documents

Make the following documents visible to Manager(s) who have access to this Applicant:

Application Forms | Additional Documents

<input type="checkbox"/>	Date	Document Type	Document Name	Added by
<input type="checkbox"/>	12/19/2013...	Acknowledgement	Acknowledgements	
<input type="checkbox"/>	12/19/2013...	Background Check	Background Check Autho...	

Page 1 of 1

Displaying items 1 - 2 of 2

Forms

Include the following forms for the Hiring Manager(s) to complete:

☐ Custom Form

☐ QA Custom Questionnaire

☐ Mark as Task for Hiring Manager(s)

+Add Note

Send

Cancel

2. Complete the fields in the pop-up window as necessary.

[Click here for description of the available fields.](#)

Update Status. Provides options to update the status of the application.

Notification Method. Determines how the application is sent to the selected managers. The options are:

- *Email Application.* This option includes a copy of the application within the email that is sent to the manager.
- *Email Link.* This option sends a link to the application via email. The recipient will need to log into Position Manager to view the application after clicking the link.

Send To. Determines who receives the application. This field can be configured to automatically default to the manager assigned to the requisition. Additional selections can be made using the **User Lookup**.

From. Determines which user the application is sent from. This field can be configured to automatically default to the recruiter assigned to the requisition. Additional selections can be made using the **User Lookup**.

Subject. Drop-down list showing the available subject lines for the email sent to selected managers.

Message. Text field for typing the body of the email sent to selected managers. Notifications include either the application or links to the system; anything entered into this box is added to the email.

Mark as Task. If selected, this option creates a task to review the application for the managers listed in the **Send To** field.

Documents. Any documents checked off in this table are made visible to managers that have access to the application.

Forms. Checking off forms in this area sends them to the selected manager(s) for completion.

Mark as Task. If selected, this option creates a task to complete the selected form(s) for the managers listed in the **Send To** field.

Add Note. Clicking this link displays the two text fields used to add Global and Internal notes to the applicant.

3. When finished with the form, click the **Send** button. The pop-up window closes and the *Applicant Detail* page reloads and displays the updated information.

Once the **Send** button is clicked, a notification is sent to the selected manager(s) stating an application is ready for their review.

The message is added to the Messages and Tasks table for the application. Any tasks assigned also appear in the table.

About Notes (Applicants)

Position Manager allows users to create notes for an applicant in the system. These notes can be [Internal or Global](#) depending on your needs.

Notes			
Default Notes All Notes			
<div> <div>Add Note</div> <div>Delete Note</div> </div>			
<input type="checkbox"/> Modified Date	Modified By	Type	Note
<input type="checkbox"/> 12/13/2017	Arecruiter, Heather	Global	Impressive CV
<input type="checkbox"/> 12/13/2017	Arecruiter, Heather	Internal	Great fit for this position, but would love t...
<div> <div> <div>1</div> <div>Page 1 of 1</div> </div> <div>Displaying items 1 - 2 of 2</div> </div>			

Notes are added to a requisition from the main *Applicant* and *Applicant Detail* pages, as well as from within various multi-function pop-up windows when performing other actions on an applicant.

The Notes table provides two views for notes added to the applicant:

- **Default Notes.** These are notes that have been added to the applicant for the specific application you are currently viewing.
- **All Notes.** This view includes all notes that have been added to the applicant across all applications in Position Manager. When viewing All Notes, the table provides **Req Number** and **Req Title** columns to identify where the note was added.

Adding a Note

Notes can be created for an applicant for reference purposes. There is no limit to the number of notes that can be added to applicants.

Notes are created from the main *Applicant* and *Applicant Detail* pages, or from one of the many multi-function windows when working with an applicant. All methods allow you to create a Global and Internal note at the same time.

1. Click the **Add Note** link above the Notes table. The *Add Note* pop-up window opens.
2. Type in the text of the note you want to create for the applicant. You can enter text into both the **Global** and **Internal** text boxes.

Add Note

Applicant Name: michael donahue

Current Status: New

Internal Note:

Great fit for this position. Very personable, impresses more in person than on paper.

Global Note:

OK

Cancel

3. Click the **OK** button.

The page reloads after the **OK** button is clicked, and the new notes appear in the Notes table for the applicant.

Notes

Default Notes | All Notes

Add Note

Delete Note

Modified Date	Modified By	Type	Note
12/13/2017	Arecruiter, Heather	Global	Impressive CV
12/13/2017	Arecruiter, Heather	Internal	Great fit for this position, but would love t...

Page 1 of 1

Displaying items 1 - 2 of 2

Applicant Note Types

When creating a note for an applicant, you have the option to determine which type of note you want to create, **Internal** or **Global**. The type of note determines where that note will be viewable for the selected applicant.

- Internal.** Internal notes are only viewable from within the application they are created. Think of them as being attached to the person's *application*, not the applicant itself.

Example: If you create an internal note for an applicant when viewing their application for Position A, that note is **not** visible when you view their application for Position B.

- Global.** Global notes are available wherever the selected applicant is viewed, regardless of which application you are viewing. Global notes are attached to the *applicant*, not an application.

Deleting a Note

Notes that have been added to an applicant can be deleted. Deleted notes can not be recovered.

Select the check the box next to the note(s) you wish to delete and click the **Delete Note** link above the table. The same dialog asks you to confirm the delete.

Clicking the **OK** button deletes the note from the applicant. A message displays stating the selected note(s) were successfully deleted.

Searching for Applicants

A standard search feature is provided on the *Applicants* page to provide quick access to records that need to be reviewed and/or updated.

Tip: Several fields in the search area use look-up windows for making selections (as opposed to drop-down lists). To use these lookups, click the **Search** icon next to the field and either search for an entry or browse the available options to make selections.

1. Locate the **Search** area in the column on the left of the *Applicants* page.

The screenshot shows the HCS IRIS Client Applicants page. The left sidebar contains a 'Search' section with 'Saved Searches' and 'Quick Search' buttons, and an 'Advanced Search' section with various filters like 'Apply Date', 'Applicant First Name', 'Requisition Number', etc. The main area displays a table of applicants with columns for Name, Apply Date, Status, Status Date, Edu, Exp, App HR, HM, and icons. The table shows results for various requisitions, including 'Aardvark Handler, 1084' and 'Aardvark Handler, 1159'.

2. Using the available search fields, select values for the criteria you wish to search against. You can use one or more of the fields for your search.
3. If necessary, select the **More** link under the search fields to view more options to include in your applicant search.
4. When all necessary criteria has been entered, click the **Search** button.

The Applicant table reloads to display those results that match the criteria used for the search.

Tip: If this search is one you will run frequently, you can [save the search](#) for quick reference for future searches.

Alternate Search Methods

The **Search** panel on the *Applicants* page also provides access to any **Saved Searches** you may have. Select the desired search from the drop-down list and click the **Go** button to run the saved search.

The **Quick Search** field above the standard search options is another way to conduct a search. Enter any text in here and the system will search all available applicant fields for a match.

Finally, you can select from a list of recently accessed applicants that are displayed at the bottom of the search panel. Clicking one of these links will open that applicant's *Applicant Detail* page.

Applicants Quick Search


The **Quick Search** feature on the *Applicants* page searches the following fields from the applicant profile:

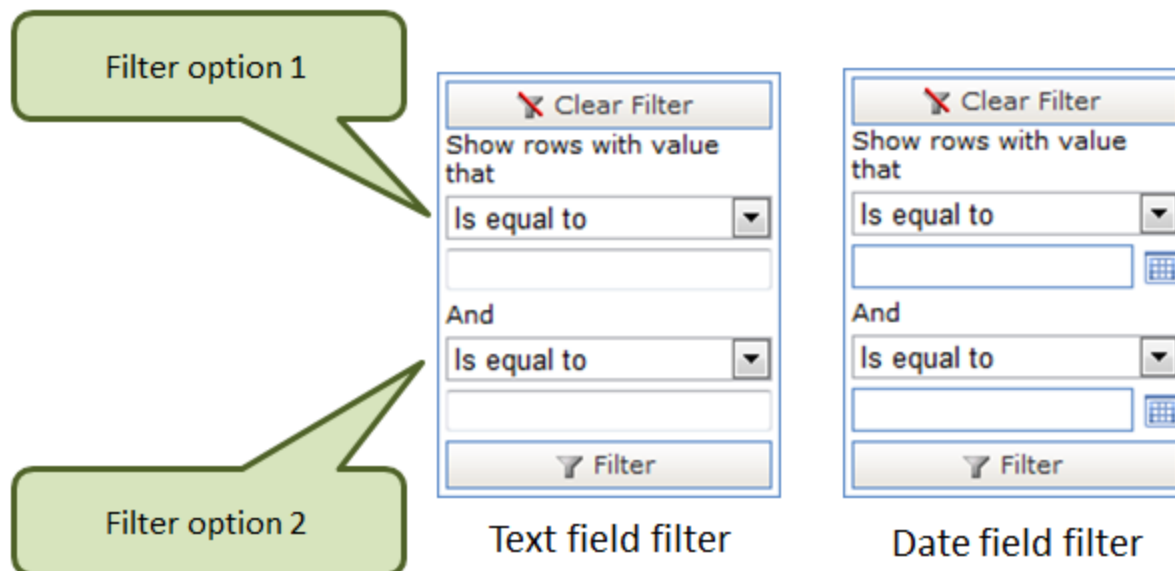
- Applicant First Name
- Applicant Middle Name
- Applicant Last Name
- Email Address
- HRIS ID (Tracking Number)
- Job Code
- Phone Number
- Position Title (refers to the requisition the applicant has applied to)
- Requisition Number

Values entered into **Quick Search** are used independently of each other when performing a search - they cannot be combined using search qualifiers such as quotations or pluses (e.g. "John Smith" or registered+nurse+emergency). Fields found in the [standard search area of the Applicants page](#) should be used to locate specific records.

Table Filters

The search results table on both the *Requisitions* and *Applicants* pages offer a filter feature that allow you to further refine search results.


Columns that can be used to filter results contain a small icon () indicating a filter is available. Clicking this icon displays a drop-down with the filter options.



The table filters allow you to filter against two sets of criteria in each column. This is why the filter contains two drop-down lists and text/date fields. When options are chosen in each filter option for a column, the system only returns results that match **both** of the filter criteria used.

When filtering on a date column, the two filter options allow you to set a date range to filter against (i.e. anything on or after *Date X* and before or on *Date Y*).

Using the available filters is a matter of setting the criteria you wish to filter against. Though the process is the same, you'll notice that there is a small difference when filtering on text fields versus date fields.

1. Click the filter icon () in the table column you wish to filter on. The filter drop-down appears.
2. Select a filter option from the first drop-down list.
3. Enter the information to use as the filter in the text/date field.
4. Click the **Filter** button.

Clicking the **Filter** button reloads the page and displays the filtered results in the table.

More about applicants

Adding an Applicant

Applicants can be added to Position Manager at any time. This is helpful when applicant information is received via email, regular mail, job fairs, etc.

These steps take place from the *Applicants* page.

To get started, click the **Add Applicant** button on the *Applicants* page. The Add Applicant wizard launches and displays the first step of the process, **Applicant Information**.

1. **Applicant Information.** The initial step of the process presents a form used to collect the necessary information regarding the applicant, such as contact information, work experience, education, etc. This information is what will be used to evaluate the applicant for openings at your organization.

Add Applicant [X]

Applicant Information

Assign to Requisitions

Additional Information

Contact Information

* Applicant First Name: Andy

Applicant Middle Name:

* Applicant Last Name: Van Slyke

Email: bucco4lyfe@gmail.com

Address Line1: 1234 Main St

Address Line2:

City: Pittsburgh

State: PA

Country: USA

Zipcode: 17536

Phone Number:

Phone Type: Please Select

Preferred Contact Method: Email

Where did you hear about this job?: Please Select

Resume

Education

Work History

Cancel Next

[Click here for details about Step 1.](#)

The first step of the wizard is broken down into different sections that collect specific information about the applicant. You can expand and contract the sections as you progress through the form by clicking on the headers for each section.

In the **Resume** section, you can either type in or copy-and-paste the applicant's **Resume** and **Cover Letter** into the available text fields.

When you have completed the necessary fields in all the sections of the Applicant Information step, click the **Next** button to continue the wizard.

Note: You must at least provide the **First** and **Last Name** for the applicant in the first **Contact Information** section in order to progress to the next step of the wizard.

2. **Assign to Requisitions.** This step is where the applicant is assigned to specific requisitions for your organization. This is necessary to ensure the applicant's information is evaluated when requisitions are being filled.

Add Applicant

Applicant Information

Assign to Requisitions

Additional Information

Assign **Andy Van Slyke** to one or more open Requisitions or Positions.

Enter search criteria to find specific requisitions or click Search to view a list of all requisitions.

Position Title or Req ID:

SEARCH

	Position Title ▲	Req#	Req Status	Req Schedule	Req Shift	Organiz
<input checked="" type="checkbox"/>	Cowboy	1187	Active - Posted	Full Time	Days	Emergenc
<input checked="" type="checkbox"/>	Cowboy	1210	Active - Not Posted	Full Time	Days	Section A

<

>

Page 1 of 1

Displaying items 1 - 2 of 2

Cancel

Previous

Next

Click here for details about Step 2.

- Locate the requisition you wish to assign the new applicant to by browsing the list or using the **Search** field above the table.
 - Click the box next to the desired requisition(s). There is no limit to the number of requisitions you can select.
 - Click the **Next** button when you have finished making the necessary selections.
3. **Additional Information.** The final step in the wizard collects the final details regarding the applicant. This information helps determine where the applicant information originated and allows you to set a status for their application(s).

[Click here for details about Step 3.](#)

- Select an **Apply Date** for the new applicant. This is the date that is used to indicate when the applicant submitted their information for the requisition.
- Select an option from the **Received From** drop-down list.
- Select a **Status** for the application. This status is applied for all requisitions selected in Step 2.
- Select a **Status Date**. This indicates when the application's status was last updated.
- Select if the applicant is a **Current Employee** or not.
- Click the **Finish** button when you have finished entering necessary information.

Clicking the **Finish** button completes the process of adding an applicant. The wizard closes and a message displays stating that the new applicant has been added to the selected requisitions.

The applicant's information is now available when evaluating applicants for the assigned requisitions.

Applicant Status

Once an application has been received in Position Manager, it will progress through a list of applicant statuses. These help define the current state of the application, reducing the time it takes to locate and process applicants for openings.

The available statuses for an applicant are defined below.

- **New.** The applicant recently applied to an opening and their credentials have not been reviewed by someone in your organization.
- **Active - Reviewed.** The applicant was reviewed to see if they are a good match for the job opening.
- **Active - Phone Screen.** The applicant is scheduled for a phone screen interview.
- **Active - Sent to Manager.** The applicant's information was sent to a manager for review.

-
- **Active - Interview.** The applicant is scheduled for an interview.
 - **Active - Check References.** Applicant references are being checked.
 - **Active - Background Check.** A background check is being run on the applicant.
 - **Active - Offer.** The applicant is deemed a viable candidate for the opening, and an offer for employment has been made.
 - **File - Hired.** The applicant is hired for the opening.

For clients that utilize Onboarding, there are additional statuses related to the "File - Hired" status:

- **File - Hired - OB Needed.** The applicant has been chosen for hire, but has yet to be assigned any documents for completion.
- **File - Hired - In process.** The applicant has been sent the necessary onboarding documents. The system is waiting for the applicant to complete the assigned documents, or for the necessary Position Manager users to sign off on (approve) those documents.
- **File - Hired - Finished.** The applicant has completed the onboarding documents, and the necessary Position Manager users have signed off on (approved) those documents.
- **File - Not Hired.** The applicant is not hired for the opening. No further action is necessary for the application.
- **File - Not Hired - Viable.** The applicant is not hired for the opening, but may be a good fit for other openings in your organization. The applicant may be resubmitted or reassigned to other openings.

Application Visibility

Application visibility refers to whether or not a manager is able to view an application in the system. Adjusting the visibility of an application helps prevent users from reviewing candidates that are unqualified for the position they applied for.

Users that are assigned to just a manager role are only able to see applications that they are assigned to, usually by a recruiter.

Users that have been assigned to multiple roles, or are not assigned to a manager role, are able to view applications based on their other system privileges.

Changing Visibility

When providing visibility to an application for a user, you will use the *Send Application to Manager* option from the **Take Action** drop-down list. This not only allows selected managers to see the application, it can also send an email notification informing them of the application now available for their review.

User Roles

Visibility rules are set through User Roles. A setting appears on the permissions page for a specific user role that

determines if the role has access to applicants only when they are sent (using the *Send Application to Manager* feature), or if the role is able to view all applications that are related to requisitions the role can access.

Disposition Reason

When an applicant status is updated to "File - Not Hired" or "File - Not Hired - Viable", the system can request a **Disposition Reason** for moving the candidate into the new status.

The **Select Disposition Reason** drop-down list appears in the *Update Status* pop-up window when one of the mentioned status values is selected.

Update Status [X]

Applicant Name: michael donahue **Current Status:** New

Update Status: File - Not Hired - Viable

Select Disposition: Does not meet minimum qualifications

+Add Note

Cancel

< Handler, 1141	show req deta
ital/Emergency	
est, JItest	
Seeker, DA	

Note: Not all Position Manager systems will collect a **Disposition Reason** when updating an applicant status. This feature is controlled on the *Client Settings* page under the **Admin** area.

Editing Applicant Contact Information

The contact information for an applicant can be edited by users that have the proper permissions.

Editing the contact information for an applicant does not change their information supplied on an individual application. Viewers of the application are still able to see the original contact information supplied with the application.

When updating contact information for an applicant, it is updated for all that applicant's submitted applications.

These steps are taken from the *Applicant Detail* page.

1. Click the **Edit Contact Information** icon (📄) next to the applicant's name in the informational header. This opens the *Edit Contact Information* pop-up window.

Edit Contact Information [X]

* Applicant First Name: Hussam

Applicant Middle Name:

* Applicant Last Name: Zawil

Email: hussam.zawil@healthcaresource.com

Address Line1: Palomino Dr.

Address Line2:

City: N. Andover

State: MA

Country: USA

Zipcode: 01845

Phone Number: 978-999-1234

Phone Type: Cell

Preferred Contact Method: Please Select

Where did you hear about this job?: Open House

[Submit] [Cancel]

2. Make updates to the available fields in the pop-up window as necessary.
3. Click the **Submit** button. The pop-up window closes and the page reloads to show the updated information.

Once the **Submit** button is clicked, the *Applicant Detail* page reloads and displays a message stating the contact information has been updated.

Reassigning an Applicant

When reviewing an applicant, you may find that they are a good fit for additional openings in your organization. Position Manager allows you to quickly copy these applicants to existing requisitions in the system.

Reassigning an applicant copies over selected information from the current application to a new application for the other requisition.

These steps are taken from the *Applicant Detail* page.

1. Select the *Reassign* option from the **Take Action** drop-down list. The *Reassignment Options* pop-up window opens.

Reassignment Options

Applicant Name: Hussam Zawil Current Status: Active - Send to Manager

Reassign Lookup Grid

Position Title: **SEARCH**

	POSITION TITLE ▲	REQ NUM	REQ STATUS	REQ SCHEDULE	REQ SHIFT	ORGANIZATION
<input type="checkbox"/>	Clin Eng Tech II	1006	Active - Posted	Full Time		Boston Hospital/Emergency
<input type="checkbox"/>	Diabetes Trainer	REQNUM-06	Active - Not Posted	Weekends	No	Boston Hospital
<input type="checkbox"/>	Diabetes Trainer	1008	Active - Posted			Boston Clinic/Neurology
<input type="checkbox"/>	Emergency Room Nurse	REQNUM-3	Active - Not Posted	Weekends	No	Boston Hospital
<input type="checkbox"/>	Emergency Room Nurse	1010	Active - Posted			Boston Clinic/Neurology
<input type="checkbox"/>	Emergency Room Nurse	1011	Active - Posted			Boston Clinic/Surgical
<input type="checkbox"/>	Lead Cardiac Monitor Tech	0440	Active - Posted	Holidays	No	Boston Clinic

Page 1 of 2 Displaying items 1 - 10 of 13

Additional Information

Apply Date: 08/06/2012

Source: Open House

Status: New

Update Status on Original Application? Please Select

Information to copy

Application: ☒

Documents Attached to Applicant: ☐

Internal Notes: ☐

OK Cancel

2. Complete the fields in the pop-up window as necessary.

Available fields

Reassignment Lookup Grid

Search for the requisition(s) you wish to reassign the applicant to using the **Position Title or Req ID** search field. Only requisitions with a status of "Active - Posted", "Active - Not Posted", and "On Hold" are listed.

Check the box next to the desired requisition(s).

Note: There is no limit to the number of positions you can select in the Reassignment Lookup Grid area.

Additional Information

-
- **Apply Date.** This is the date the reassigned application will display as originally applied.
 - **Source.** Determines where the new application originated from.
 - **Status.** Sets the status for the new application.
 - **Update Status on Original Application.** Select an option from this drop-down if you wish to update the status of the original application.

Information to copy

This section allows you to select which items you wish to copy from the original application to the new application. You can select to copy the **Application**, **Documents Attached**, and **Internal Notes**.

The **Application** option is checked by default.

3. When finished entering necessary information in the *Reassignment Options* pop-up window, click the **Save** button.

After the **Save** button is clicked, the page reloads and displays a message stating the applicant(s) has been successfully copied to the selected requisition(s). The applicant now has a record of applying to the selected requisition(s) in the system.

About Screening

Screening in Position Manager refers to the collection and analysis of information relating to the applicant that goes above and beyond the usual data submitted for a job posting. Screenings assist with the evaluation of an applicant to determine if they are the right candidate for a particular opening at your organization.

Screening Types

There are three main types of screening in Position Manager:

- **Background check.** Background checks on the applicant performed by third-party vendors.
- **Assessments.** Assessments are details regarding the behavior, skills, and general profile of the applicant. This includes:
 - **HealthcareSource Staff Assessment (HSA).** Staff assessments have been designed and validated to identify top performers.
 - **HealthcareSource Leadership Assessment (HLA).** Leadership assessments have been designed and validated by hospitals to identify the very best healthcare leaders.
- **Reference check.** Reference checks on the applicant involve contacting and gathering information from people the applicant has submitted as professional and/or personal references for the position they are applying. HealthcareSource Reference Assessment (HRA) is an advanced employee reference check solution that automates pre-employment reference checking.

Where is Screening found?

Screening information can be found on the *Applicants* page and the *Applicant Detail* page.

The *Applicants* page has a column in the applicants table dedicated to displaying the current status of the different screening types. The final column of the table contains colored indicators under the headings of A (assessments), B (background check), and R (reference check).

Clicking these colored indicators expands the row and displays the **Screening** tab from the applicant's *Applicant Detail* page.

On the *Applicant Detail* page itself, screening information is found in the **Additional Information** section under the **Screening** tab. There are several links available for the different types of screening (Background, Assessments, Reference) that display information about the selected screenings.

Screening Table

The table on the **Screening** tab lists several informational columns about the requested screenings:

- **Last Update.** This is the date of the last change to the requested screening.
- **Vendor.** This lists which vendor was used for the screening.
- **Status.** The current status of the screening.
- **Actions.** This column provides a quick link to actions for the screening. More information about this functionality will be added once it has been introduced.

About Background Checks

Background checks are performed on applicants as a means to verify and evaluate a candidate's qualifications, character, etc, and help identify any potential hiring risks.

Position Manager integrates the process of requesting and reviewing background check information for applicants so users can perform these evaluations directly from the Position Manager system. This helps speed the candidate review process along so positions are quickly filled.

Though the actual checks themselves are performed by third-party vendors, Position Manager has been designed to easily integrate with these vendors to request and provide necessary information for the user.

Where are Background Checks found?

Background check information is associated with the applicant on which the check was performed. Therefore, background check information can be found on the *Applicant Detail* page under the Additional Information section.

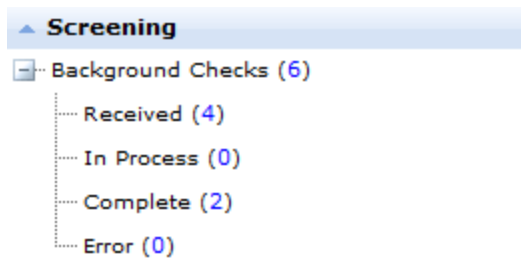
Additional Information			
Documents	History	Screening	New Hire
Background Check			
Last Update	Vendor	Status	Actions
02/15/2013	Universal Background Screeni...	Completed	View Results
02/15/2013	Universal Background Screeni...	Received	
<div> 1 Page 1 of 1 </div> <div>Displaying items 1 - 2 of 2</div>			

The **Screening** tab in this section contains a sub-link for **Background Check**. This table displays the history of background check requests and provides links to view completed checks.

Additional Areas

There are additional areas that display quick view information about background checks.

- The left-hand column of the *Dashboard* displays several sections of quick links. One of these areas is Screening, which contains a section for **Background Checks**.



This section displays the number of background checks in each possible status. Clicking a status opens the *Applicants* page and displays each applicant with a background check in the selected status.


- On the *Applicants* page, the applicants table contains columns for indicating the status of the various available screenings. The column labeled "B" indicates the status of an applicant's background check using a colored dot.

Hovering your cursor over these colored indicators opens a small pop-up window that displays the status of the background check. Clicking this dot expands the applicant row to display the Background Check table on the **Screening** tab.

Last Update	Vendor	Status	Actions
02/15/2013	Universal Background Screening	Completed	View Results
02/15/2013	Universal Background Screening	Received	

Page 1 of 1 | Displaying items 1 - 2 of 2


- Finally, on the *Applicant Detail* page, the header that displays the applicant information has **Screening Status** indicators similar to the ones used on the *Applicants* page.

Asha Ramadas 

Hudson, NH 03051
11111111

Click to View or Download



Status: **Active - Sent to Manager**
Previous Applications: (1, 0, 2, 4)
Screening Status: B: 

Tracking ID: 282
Type: Applicant
Received Via: Online

◀ [previous application](#) [next application](#) ▶

Hovering your cursor over the colored dot displays the same status pop-up window.

Background Check Status

Position Manager provides visual status indicators to help make it easy for users to determine where in the process their requested background checks lie. The available statuses and their meaning are described below.

- **Received.** The selected vendor has received the request for a background check.
- **In Process.** The vendor has begun processing the requested background check.
- **Complete.** The background check has completed and the results are ready for viewing.
- **Error.** An error occurred in the request and/or processing of the background request. The request needs to be re-submitted.

Initiating a Background Check

In order to run a background check, the selected applicant must have completed the necessary authorization forms from the career site. Additionally, ensure your browser's pop-up blocker has been disabled for Position Manager.

These steps take place from the *Applicant Detail* page.

1. Select the *Initiate Background Check* option from the **Take Action** drop-down menu. This opens a new browser window that loads the website of your company's chosen background vendor.
2. On the vendor site, enter any additional information necessary to complete a background check.

Note: You may be required to log into the vendor site before completing the background check request. This only occurs on the first time you log in to the vendor site. Your browser will automatically provide your login information to the vendor site for subsequent requests so you may bypass this step in the future, provided you do not clear your browser cookies.

3. After you have completed the form and submitted the request, the vendor pop-up window closes. The Background

Check table on the **Screening** tab is updated to indicate the request has been received.

Additional Information			
Documents	History	Screening	New Hire
Background Check			
Last Update	Vendor	Status	Actions
03/25/2013	Universal Background Screening	Received	

At this point, the background check request has been submitted. Position Manager automatically updates once the vendor has returned the results of the background check and is ready for viewing.

Setting Up for Background Checks

Before any background checks can be run in Position Manager, your system must be properly configured and users need to have the necessary access to request background checks.

Prerequisites

The basic prerequisites for background checks include:

- Establishment of an account with the background vendor of your choice.
- Having the background check feature enabled in Position Manager by a HealthcareSource support representative.

User Setup

Once the above requirements have been fulfilled, your system is ready to utilize background checks, and users can now be granted the ability to perform these checks.

These steps indicate how to activate users for background checks.

1. Locate the **Vendor Access** area on the *User Detail* page for the selected user.
2. Click the **Add Vendor User Account** button. This opens the *Add Vendor User Account* pop-up window.

Add Vendor User Account

* Vendor Type

Background Check

* Vendor

Please Select

* User ID

<vendor_user_id>

OK







Cancel

3. Select *Background Check* from the **Vendor Type** drop-down list.
4. Select your chosen background check vendor from the **Vendor** drop-down list.
5. Enter the **User ID** for the user.

Note: The User ID is provided to you from the background check vendor. It is not the same User ID that is used for the Position Manager system.

6. Click **OK** when finished.

After clicking **OK**, the pop-up window closes and the selected vendor is displayed in the Vendor Access table. The user is now able to request background checks on applicants.

Vendor Access		
		
 Name ▲	 Type ▼	 User ID ▼
 Universal Background Screening	Background Check	522

Setting and Modifying User Permissions

Background check privileges may be granted or revoked to specific users. To add or remove these permissions, you must go to the *User Role Detail* screen, located within the *User Roles* page under the **Admin** top navigation tab.

Core3ProdClient / User Roles

Take Action ▼ Add User Role

<input type="checkbox"/>	Name ▲	Type	User Count
<input type="checkbox"/>	Administrator	System	25
<input type="checkbox"/>	General	System	1
<input type="checkbox"/>	Hiring Manager	System	7
<input type="checkbox"/>	Onboarding Router	System	1
<input type="checkbox"/>	Recruiter	System	38
<input type="checkbox"/>	Requisition Approver	System	2

1 25 Page 1 of 1

Displaying items 1 - 6 of 6

From this screen, perform the following steps:

1. Click into the *User Detail* page of the user role you want to modify.
2. Within this page, click the **Position Manager** tab.
3. Under this tab are several additional sub-categories. Within these categories, click **Applicant Screening** to see the various available screening permissions.

Core3ProdClient / User Roles / User Role Detail

Take Action ▼

* Name Administrator Associated System Role: Administrator

RoleID 1

Administration **Position Manager** Reports Talent Pool

Job Postings | Applicant Management | Requisitions | Dashboard | **Applicant Screening**

Permission Name	Select All	Area of Responsibility	Position In Hierarchy	Custom Level
View Screening Tab	✓	✓	✓	Please Select ▼
Background Check - Initiate	✓	✓	✓	Please Select ▼
Background Check - View Status ...	✓	✓	✓	Please Select ▼
Assessments - View Status Indic...	✓	✓	✓	Please Select ▼
Assessments - Send	✓	✓	✓	Please Select ▼
Reference Assessment - Send In...	✓	✓	✓	Please Select ▼
Reference Assessment - View Fee...	✓	✓	✓	Please Select ▼
Reference Assessment - View Sco...	✓	✓	✓	Please Select ▼
Reference Assessment - View Sta...	✓	✓	✓	Please Select ▼

Save Cancel

4. Clicking a check mark or X icon toggles individual access permissions for the user role. You may configure user roles however you see fit. When you've finished working here, don't forget to click **Save** to apply all your hard work

and careful consideration to the role. Saved changes take effect immediately.

Core3ProdClient / User Roles / User Role Detail

Take Action

Name: Hiring Manager
RoleID: 3
Associated System Role: Hiring Manager

Administration | Position Manager | Reports | Talent Pool

Job Postings | Applicant Management | Requisitions | Dashboard | **Applicant Screening**

Permission Name	Select All	Area of Responsibility	Position in Hierarchy	Custom Level
View Screening Tab	✓	✓	✓	Please Select
Background Check - Initiate	✗	✓	✗	
Background Check - View Status Indicators	✗	✗	✗	
Assessments - View Status Indicators	✓	✓	✓	
Assessments - Send	✗	✗	✓	
Reference Assessment - Send Invitation	✓	✓	✓	Please Select
Reference Assessment - View Feedback Report	✗	✓	✗	Please Select
Reference Assessment - View Score	✓	✓	✓	Please Select
Reference Assessment - View Status Indicators	✓	✓	✓	Please Select

Save Cancel

Viewing a Background Check

When the vendor has completed the background check and returned the results, the applicant's record in Position Manager is automatically updated to indicate the report is ready for viewing.

To view the report, click the **View Results** link on the **Screening** tab. This opens a new browser window to the vendor's website, which displays the report information.

Additional Information

Documents | History | **Screening** | New Hire

Background Check

Last Update	Vendor	Status	Actions
03/27/2013	Universal Background Scree...	Completed	View Results
03/27/2013	Universal Background Scree...	Received	

Page 1 of 1 | Displaying items 1 - 2 of 2

Tips and Tricks

Position Manager as a whole is designed to provide you with the functionality you need to perform necessary tasks with the least amount of clicks as possible. Get in, get out, get on with your day.

In addition to this overall concept of easy access and quick task completion, Position Manager also contains several little time- and energy-saving tactics throughout the system.

This chapter discusses the following:

Saved Searches	143
Collapsing Panels	144
Fast tracking a Requisition	146
Frequently Asked Questions	147

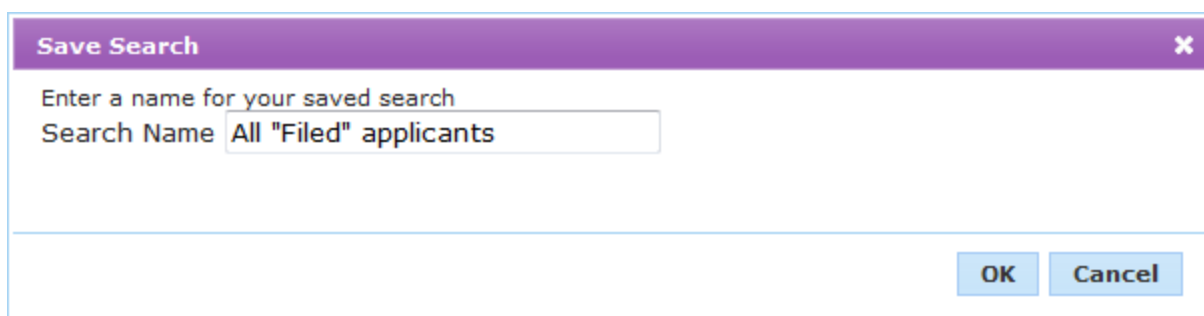
Saved Searches

The **Search** panels found on many pages in Position Manager enable you to quickly locate records using precise search filters. To further speed the search process, many of these pages also offer the ability to save searches. Once a search is saved, you can perform that search simply by selecting it from the drop-down list.

Saving a Search

The ability to save a search is available on most pages that contain a search panel. There is a limit of 10 saved searches per area.

1. From the **Search** panel on the desired page, enter the criteria you wish to search against.
2. Select the **Save This Search** link at the bottom of the panel.
3. In the *Save Search* pop-up window, type in a **Search Name** and click **OK**.

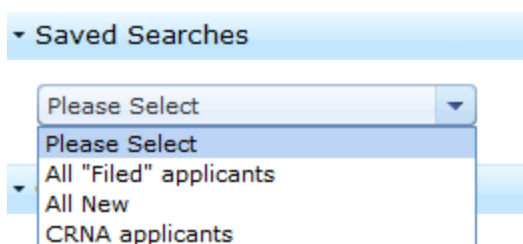


The system will display a message stating the search was successfully saved.

Using a Saved Search

If you have saved searches for a particular page, you can use those to quickly locate necessary records.

1. From the **Search** panel on the desired page, select the search you wish to run from the **Saved Searches** drop-down list.



The page will reload to display the criteria for the selected search.

2. Click the **OK** button. The page will again reload and display the results of the search in the table.

Editing a Saved Search

You can also update a saved search to include new or different criteria.

1. From the **Search** panel on the desired page, select the search you wish to update from the **Saved Searches** drop-down list. The page will reload to display the criteria for the selected search.
2. Make the necessary changes to the available search criteria in the Search panel.
3. Select the **Update This Search** link at the bottom of the panel. The system will display a message stating the search was successfully updated.

Other Saved Search Actions

In addition to updating a saved search, you can also rename one as well. Clicking the **Rename** link under the **Saved Search** drop-down list (after selecting a saved search from the list) will open a pop-up window that allows you to modify the name of the saved search.

Deleting a saved search is just as easy. Select a search from the drop-down list and click the **Delete** link. You'll get a pop-up window asking you to confirm the deletion.

Collapsing Panels

We understand that not everyone gets to use those beautiful, huge high-definition computer monitors when working in Position Manager. Sometimes the screens are small, making every inch of your view valuable.

That's where the collapsing panels come into play. Every time you are viewing a page that contains a Search panel (located on the left side of the screen), you have the option to collapse, or hide, that panel so you can see more of the table.

These collapsing panels are also available on *Requisition Detail* and *Applicant Detail* pages as well - just on the opposite side. These detail pages contain informational panels on the right side of the page, and they can also be temporarily hidden at any time.

How does it work?

Collapsing panels are indicated by their gray side tabs. If you look at the Search panel on any page in Position Manager, you'll notice a gray tab to the right of the panel near the top. Clicking this tab slides the entire page to the left, covering the Search panel completely. The table now takes up the entire page.

HealthcareSource Services / Requisitions/Jobs

Search

Take Action

Add Requisition

10

Displaying items 101 - 110 of 194

Req #	Position Title	Job Code	Req Status	Job Category
1029	Charge Nurse	Med108-2010	Active - Posted	Administrative Support
1031	Charge Nurse	Med108-2010	Active - Posted	Administrative Support
1052	Charge Nurse	Med108-2010	Draft	Clinical Professional
1053	Charge Nurse	Med108-2010	Draft	Clinical Professional
1054	Charge Nurse	Med108-2010	Draft	Clinical Professional
1055	Charge Nurse	Med108-2010	Approved	Clinical Professional
1056	Charge Nurse	Med108-2010	Approved	Clinical Professional
1040	Charge Nurse	Med108-2010	Active - Posted	Administrative Support
1042	Charge Nurse	Med108-2010	Draft	Clinical Professional
1043	Charge Nurse	Med108-2010	Draft	Clinical Professional

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HealthcareSource Services / Requisitions/Jobs

Take Action

Add Requisition

10

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Req #	Position Title	Job Code	Req Status	Job Category	Organization	Created Date
1029	Charge Nurse	Med108-2010	Active - Posted	Administrative Support	Section A	09/26/2013
1031	Charge Nurse	Med108-2010	Active - Posted	Administrative Support	Section A	09/26/2013
1052	Charge Nurse	Med108-2010	Draft	Clinical Professional	Section A	09/30/2013
1053	Charge Nurse	Med108-2010	Draft	Clinical Professional	Section A	09/30/2013
1054	Charge Nurse	Med108-2010	Draft	Clinical Professional	Section A	09/30/2013
1055	Charge Nurse	Med108-2010	Approved	Clinical Professional	Section A	09/30/2013
1056	Charge Nurse	Med108-2010	Approved	Clinical Professional	Section A	09/30/2013
1040	Charge Nurse	Med108-2010	Active - Posted	Administrative Support	Section A	09/27/2013
1042	Charge Nurse	Med108-2010	Draft	Clinical Professional	QA Department-5110	09/30/2013
1043	Charge Nurse	Med108-2010	Draft	Clinical Professional	QA Department-5110	09/30/2013

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Same goes for the right-side panels found on *Requisition Detail* and *Applicant Detail* pages. Click on the gray tab to the left of the panel, and the page pans right, covering up the right-side panel and giving the main view more screen real estate.

HealthcareSource Services / Requisitions/Jobs / Requisition/Job Detail

Charge Nurse [Req # 1031]

Take Action Status Active - Posted

Requisition Information

Req Details Job Postings History Detail

Standard Information

Requisition Number 1031 Position Title Charge Nurse (Med108-2010)

Hiring Manager HiringManager, QA Organization Burn Center/Cardiology/Clinic/Section A (Code)

Recruiter Recruiter, QA Created Date 9/26/2013

Requisition Details

Reason for opening ☒ New Position Replacement for? vwyyq

☐ Replacement

☐ Temporary

Schedule/Hours:

Schedule Full Time Hours/Pay Period jqoe

Shift Days FTE 3.40

Hours 40

Pay/Compensation:

Pay Grade Pay Grade 10 Sign on Bonus orjj

Salary To be determined Referral Bonus qhpm

Requisition Workflow History

Date	Action	User
9/26/2013	Created	Admin, QA
9/26/2013	Approved	Admin, QA
9/26/2013	Approval Complete	Admin, QA
9/26/2013	Active Posted	Admin, QA

Last Modified by Admin, QA on 9/26/2013

HealthcareSource Services / Requisitions/Jobs / Requisition/Job Detail

Charge Nurse [Req # 1031]

Take Action Status Active - Posted

Requisition Information

Req Details Job Postings History Detail

Standard Information

Requisition Number 1031 Position Title Charge Nurse (Med108-2010)

Hiring Manager HiringManager, QA Organization Burn Center/Cardiology/Clinic/Section A (Code)

Recruiter Recruiter, QA Created Date 9/26/2013

Requisition Details

Reason for opening ☒ New Position Replacement for? vwyyq

☐ Replacement

☐ Temporary

Schedule/Hours:

Schedule Full Time Hours/Pay Period jqoe

Shift Days FTE 3.40

Hours 40

Pay/Compensation:

Pay Grade Pay Grade 10 Sign on Bonus orjj

Salary To be determined Referral Bonus qhpm

Fast tracking a Requisition

By default, all new requisitions created in Position Manager must be approved by appropriate managers before they can be posted as open jobs.

However, there is a setting that allows you to set the status of a new requisition to "Approved" when it is initially created (a requisition must be in this "Approved" state in order to be posted as a job). When this setting is enabled, it allows you to quickly create requisitions and immediately post them as open jobs. This is called fast-tracking a requisition.

Note: This option is a system-wide setting that affects all new requisitions created in the system.

The setting for this option can only be modified by HealthcareSource Support personnel. Please [contact a Support representative](#) for assistance.

The process for fast tracking a requisition isn't much different from the usual process of creating a requisition and posting a job. The only difference is there is no approval process to worry about.

With the default approval process, taking a requisition from initial creation to a posted job is three basic steps:

1. Create the new requisition.
2. Route it to necessary managers for approval.
3. Post the approved requisition as a job.

When the fast tracking option is enabled, Step 2 above is skipped completely. When you initially create and save the requisition, it is automatically moved to a state of "Approved" and is then ready to be posted. From there, you simply follow the usual steps for posting a requisition as a job.

Frequently Asked Questions

Below are some of the more frequently asked questions in regards to Position Manager. Please check back often as this list is continually updated.

Don't see a topic you believe should make the list? [Let our Support Team know](#).

Why don't records I just created/edited show up in my report?

Report data is pulled from a copy of your actual working database in order to improve overall system responsiveness and stability. Once an hour, data is copied to this reporting database for use in the Reporting tool. This means that your report data could potentially be up to an hour behind.

What is "fast tracking" and how do I do that with a requisition?

Some users of Position Manager may not want to bother with the approval process that's set by default when creating new requisitions. Some user may just want to quickly create a new requisition and post it as a job right away.

Position Manager 11 offers a setting that allows you to bypass the usual approval process for requisitions, making them immediately available to post as open jobs. This setting can only be modified by Support personnel, so [get in touch](#) if you need assistance.

Check out the topic on [Fast Tracking a Requisition](#) for more information.

How do I set user permissions?

User permissions are controlled by [User Roles](#). You create a new user role, set the permissions for that role in the [Admin](#) area, then assign users to that role.

Is Position Manager compatible with mobile devices?

Unfortunately, Position Manager currently does not support the use of mobile devices, such as smartphones and tablets. However, we are continually striving to improve the overall user experience with all of HealthcareSource solutions, and mobile access is one of the items we hope to deliver over the course of the next year. Please feel free to [contact Support](#) for more information.

What is the wing speed velocity of an unladen swallow?

African or European?

Support

If you have additional questions regarding HealthcareSource solutions, please contact our Support department at the information listed below.

Online: [HealthcareSource Community Solutions](#) is the destination for you to request product support, browse our knowledgebase of articles for self-help and best practices, access product information, and collaborate and interact with both HealthcareSource staff and fellow users of our solutions. [Learn more](#)

Email: pmsupport@healthcaresource.com

Phone: 1-800-869-5200