Managing and Progressing the Candidate Pool: Benefited Hires

This guide will cover:

- Screening candidates, creating a matrix, requesting and receiving approval to advance the candidate to the Interview Step.
- Communicating with candidates throughout the search process.
- The process of interviewing, updating the matrix, selecting a candidate, requesting and receiving approval to advance the candidate to the Offer Step.
- Making an offer and finalizing the hire.

Although this guide outlines the basic steps of the systematic process, remember the Human Resources Employment Partners (307-766-2377) are available for questions and guidance at any point in the process.

**Step One: Access Recruiting**

Navigate to the Recruiting section of WyoCloud from WyoWeb.

- Upon signing in, the homepage will display. Click on the **Navigator** button (three horizontal lines) in the upper left corner.

- First click **My Team** to expand, then click **Recruiting** within the Navigator.
Navigate to the **Recruiting** section.

**Adobe Flash is required for use of recruiting. For assistance enabling Flash within your browser, see this [Knowledge Base article](#).**

**Step Two: Access List of Candidates**

The day after a requisitions closes, your Employment and Staffing Partner will provide a final list of applicants who have met minimum qualifications via email.

Navigate to the Requisition that is being filled and select the candidate to screen their profile.

- Click on **Requisitions** in top tool bar or the dashboard.
 On the Requisitions window, find the Requisition that is being filled.
 Click on the number link next to the Requisition Title to view the list of candidates.

Step Three: Screening Candidates
Review candidate information, complete hire matrix (benefited jobs) and progress into approvals.
 Select the candidate name to review their application.
- Candidate information can be reviewed by clicking the expand icon in each section of the candidate file.

1. Personal Information

- First Name: Izzy
- Last Name: Trangs
- Address Line 1: 1000 E University Ave
- City: Laramie
- Zip/Postal Code: 82071
- Email Address: izytrungs@gmail.com

2. Submission Information

- Please note section 6. Questionnaire includes answers to the required UW application questions such as veteran status and conviction related information.
  - **Note:** Candidates cannot be screened out based upon the answers to these questions. If you have questions/concerns, contact your Employment Partner (307-766-2377).

6. Questionnaire

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Have you ever been convicted of or pled guilty or no contest to a sex crime against a minor or a sex crime involving violence? Please note: choosing YES does not preclude you from employment at the University of Wyoming. Convictions are reviewed on a case-by-case basis.</td>
<td>Yes</td>
<td>—</td>
</tr>
<tr>
<td>2. If you have answered YES to having a sex crime, please provide information below and contact Human Resources to provide necessary documentation.</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>3. Have you ever been convicted of or pled guilty or no contest to a felony? Please note: choosing YES does not preclude you from employment at the University of Wyoming. Convictions are reviewed on a case-by-case basis.</td>
<td>Yes</td>
<td>—</td>
</tr>
<tr>
<td>4. If you have answered YES to having a felony, please provide information below and contact Human Resources to provide necessary documentation.</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>5. Have your current or previous employer ever determined that you violated a policy or regulation of that employer? Please note: choosing YES does not preclude you from employment at the University of Wyoming. Policy violations are reviewed on a case-by-case basis.</td>
<td>Yes</td>
<td>—</td>
</tr>
<tr>
<td>6. If you answered YES to violating a policy or regulation of your previous employer, please explain below.</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>7. Are you an honorably discharged veteran who, at any time, has lived in the state of Wyoming for at least one year?</td>
<td>Yes</td>
<td>—</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>—</td>
</tr>
</tbody>
</table>
Click on the **Attachment** tab to view documents the candidate submitted such as cover letter, resume/CV and/or other supplemental documents.

After reviewing all candidates, all benefited hires must complete a hiring matrix.

- To begin the matrix, return to the list of all candidates where you will export all candidate details to Excel.
- Check the **box** at the top to select all candidates then click the **Excel icon**.
This exports an excel containing the basic details for all candidates, from here you can delete columns that don’t apply and build out the matrix including job specific minimum and desired qualifications. HR recommends to delete all columns accept for the Profile, Last Name, First Name, Middle Name and Identification columns. If you need assistance, contact your Employment Partner (307-766-2377).

The Profile column provides a link directly to the candidate’s application within the system.

- After completing the matrix, the Hiring Manager/Assistant MUST email it to the Employment Partner. They will attach it to the requisition.
- In addition, the candidate status will need updated within the system.
- Check the box to the left of the candidates you’d like to progress onto the next step.
- Click on the **More Actions** drop down then **Change Step/Status**.
  - **Note:** When changing the status of multiple candidates at once, all selected candidates must be in the same step/status and be moving to the same step/status.

- In the pop up window, use the **New Status** drop down to progress candidates you’d like to interview to the appropriate approval status:
  - **Request HR Approval** for staff jobs
  - **Request EEO Approval** for academic or administrative jobs
- Click **Save and Close**.

No additional action should be completed until approvals are complete. The Hiring Manager/Hiring Manager Assistant will receive email notification when the appropriate personnel from HR or EEO have completed the review and updated the status to Approved.
Step Four: Interview Step

After receiving approval, selected candidates will appear with a step of Interview. The Hiring Manager (or Search Committee) will schedule and conduct interviews outside the system. After interviews, the hiring matrix should be updated and Hiring Manager/Assistant will update the candidates to the appropriate statuses.

- Throughout the interview scheduling and completing process, candidate’s statuses should be updated appropriately.

Once the candidate pool has been narrowed, candidate reference checks via Skill Survey can be requested. The exact timing of this check is up to the Hiring Manager’s discretion.

- To initiate the Skill Survey reference check, check the box next to candidates you’d like included. Click on More Actions then Change Step/Status.
- In the pop up window, move the *New Status* drop down to **Proceed to Reference Check** for candidates you’d like to complete reference check.
- Click **Save and Close**.

Once completed, a summary of the Reference Check is provided to the Hiring Manager/Assistant by the Employment Partner. The Hiring Manager/Assistant may disseminate information to Search Committee members as necessary. **Note:** Further progress cannot be completed until the Reference Check is completed.

- If the Hiring Manager wishes to advance the candidate, the status can be changed. If the Hiring Manager chooses to reject the candidate, explanation must be provided from the Details and Disposition list.
- Click **Save and Close** when finished.
Step Five: Pre-Offer

Select the candidate(s) to communicate a verbal offer.

- The Hiring Manager/Assistant will receive notification once the Interview step is completed, indicating their action is necessary to move the process forward.
- At this stage, only the final candidates should remain in the Step Pre-Offer – Candidate Selection Under Hiring Manager Review. The Hiring Manager/Assistant may determine to move all remaining candidates forward in the process, or reject some of the remaining candidates based on the information revealed in the reference check.

Final candidates should be progressed to the Request Final Candidate Selection Approval status. The final hiring matrix must also be emailed to the Employment Partner.

- Check the box(es) to the left of the desired candidates and click More Actions then Change Step/status.
- Update candidate(s) to the status **Submitted for EEO/HR Review** status, click **Save and Close**. This will route the final candidate(s) to EEO/HR for their approval.
- At this point it may be appropriate to also update status and disposition candidates which are not progressing in the search. See **Finalizing the Hire** step for details.

Rank all candidates that are acceptable for hire within the final matrix. Be sure to email this final version of the matrix to your Employment Partner. All candidates who fit this criteria should be placed into the **Submit for EEO/HR Review** status. The Hiring Manager/Assistant will receive an email notification once EEO/HR has reviewed and approved.

No additional action can be completed until approvals are complete. The Hiring Manager/Assistant will receive email notification when approval is complete.

- At this time, the Hiring Manager/Assistant is responsible for communicating the verbal offer of employment outside of the system. This action typically occurs over the phone. Once the hiring manager speaks to the candidate, the hiring manager indicates the candidate’s response in the system. To do so, click on **More Actions**, and **Change Step/status** on the candidate profile.
- The Hiring Manager will update the step/status based on the candidate’s response. If the candidate accepts the verbal offer, select **Verbal Offer Accepted**, add comments.
- Click **Save and Continue**.

- After hitting **Save and Continue**, the status should show as **Proceed to Written Offer**.
- Click **Save and Close**.
If the candidate does not accept the verbal offer, select **Pre-Offer Rejected**, select the most appropriate reason for their withdrawal from the *Details or Disposition* list, add comments, and click **Save and Close**.

---

### Step Six: Finalizing the Hire

Once the verbal offer is accepted and the candidate’s status is changed to Proceed to Written Offer, contact your Employment Partner to communicate specific hire details, such as salary, start date (*MUST be a minimum of 2 weeks out, unless otherwise arranged with the Employment Partner*), and other information.

- Please follow the posted process on determining Start Dates – see information in the Hiring Toolkit: “[How to Determine What Your Employee’s Start Date Can Be](#)”

The Employment Partner will kick off appropriate actions in the system to finalize the hire. Throughout this process, the Hiring Manager/Assistant will be able to view changes in the candidate’s status within the requisition. In addition, some stages include email notifications to the Hiring Manager (when the offer has been accepted, for example). The following are some examples of the stages the candidate will move through.

**For Staff and Administrative searches,** the Employment Partner will prepare the written offer and send it through appropriate approvals. These approvals begin with the Hiring Manager and continue up the chain to the Vice President level (for most hire types). While Approvals are in progress, this will be noted on the candidate’s status.

**For Academic searches,** once the search has reached the step of drafting the formal offer letter, please reach out to the responsible HR Employment Partner to ensure all previous steps are completed and approved. The Hiring Manager or Hiring Manager Assistant will DRAFT an official offer using an appropriate [template provided by Academic Affairs](#).
The Hiring Manager or Hiring Manager Assistant is required to have Academic Affairs review and approve the offer letter outside of the system prior to releasing it to the candidate. Once a signed offer letter is received, it will be provided to the Employment Partner to upload into the system and initiate the Certificate of Employment process. This process kicks off an electronic task to the candidate to review and formally "accept" the job offer and will start the processes that finalize the hire, which include: 2nd Pass Application, Background Screening and Hire.

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Step</th>
<th>Step Status, Inst.</th>
<th>Requirements</th>
<th>Assets</th>
<th>Residence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Treating, Ian (17929)</td>
<td>Offer (Revisions Only)</td>
<td>Offer (Revisions Only)</td>
<td>0 / 0</td>
<td>0 / 0</td>
<td>US &gt; WY &gt; Laramie</td>
</tr>
<tr>
<td>Harris, Nate (17902)</td>
<td>Screen (Require EEO Approvals)</td>
<td>Screen (Require EEO Approvals)</td>
<td>0 / 0</td>
<td>0 / 0</td>
<td>US &gt; WY &gt; Laramie</td>
</tr>
<tr>
<td>Charles, Robert Faber (18006)</td>
<td>Pre-Offer (Require EEO Approvals)</td>
<td>Pre-Offer (Require EEO Approvals)</td>
<td>0 / 0</td>
<td>0 / 0</td>
<td>US &gt; CA &gt; Los Angeles</td>
</tr>
</tbody>
</table>

- Once all approvals are received, the candidate will show with a status of **Offer Approved**.
- After approvals are complete, the Employment Partner will extend the offer which places the candidate in the **Offer Extended** status.

![Candidates.png](attachment:Candidates.png)

- After the offer has been accepted, the Employment Partner will continue to work with the candidate to complete a second pass application (personal details which are not collected as part of the application are provided, such as social security number, date of birth and gender) and background screening.

  **CAUTION**: Please note that the candidate **MUST** accept the offer digitally as well as complete the second pass application (if they are a new to UW hire) **prior** to being able to start. Hiring Managers/Assistants can aide in this by communicating these steps are required when making the verbal offer.

**Step Seven: Sending Correspondence to Unsuccessful Candidates**

Throughout the process, it is the Hiring Manager/Assistant’s responsibility to communicate to other candidates that they are no longer in consideration for the position. This can be done earlier in the process for candidates you know will not be considered even if a top candidate withdraws. However, it **must** be completed for all remaining candidates prior to finalizing the hire.

- To send a rejection to a candidate, check the box next to the rejected candidate’s name.
- Click **More Actions** and **Send Correspondence**.

![Candidates.png](attachment:Candidates.png)
In the Send Correspondence pop-up window, click the selector icon next to From Template to choose a pre-defined template.

In the Template Selector pop-up window, click Select next to the appropriate rejection template.

Click Next on the Send Correspondence window.
In the Message Preview window verify that all information is correct. To edit the message, click Edit.

Once all information has been verified, click Send.

Correspondence can be sent for multiple candidates at once only if they are in the same step/status AND have the same reason for rejecting (i.e., did not meet minimum qualifications).

---

**Step Eight: Direct Hire Process**

Outlines steps for a Direct Hire of a Benefitted Staff Hire

- Once the candidate applies, your Employment and Staffing Partner will review the candidate materials to ensure all required materials have been provided and all minimum qualifications are met.
- The Employment and Staffing Partner will then email the Hiring Manager/Assistant letting them know to make a verbal offer to the candidate. Please see the “How to Determine What Your Employee’s Start Date Can Be” guide in the Hiring Toolkit.
- Once the verbal offer is accepted, the Hiring Manager/Assistant will notify the Employment and Staffing Partner of the agreed upon start date.
- Once the Offer is approved and extended, please make sure your candidate accepts the offer within the recruiting system and provides any additional information that may be requested.

You have now completed the steps to manage and progress the candidate pool for benefited hires.