



# **Unicorn HRO**

## **Hiring Process**

## Overview

The hiring process can be tracked from start to finish, including adding requisitions, tracking resumes that were received, entering applicant data, searching for qualified candidates, and hiring the new employee. Use the functions described below to track this data.

### 1) Add Agency Information

### 2) Add Requisition.

Functions:      Requisition Worksheet: add requisition to fill open position  
                     Requisition Cost: enter costs incurred to fill the open position  
                     Requisition Information: displays Position Control information about open job  
                     Requisition Approval: Person with PIN Number authorization approves requisition  
                     Requisition Purge: delete old requisitions prior to specified date

### 3) Add Resumes received in response to open position.

Functions:      Resume Worksheet: add resume containing basic information about person  
                     Resume EEO Information  
                     Resume Addresses  
                     Resume Education  
                     Resume Previous Employment  
                     Resume Skill Information  
                     Resume Training Information  
                     Resume Areas of Interest Information  
                     Resume Certification  
                     Resume Picture

4) A search for qualified candidates can be performed on the Candidate Worksheet, accessing the Resumes file. (See Candidate Worksheet section for details.) Resumes can then be activated as applicants. By doing this, resume data is moved to the applicant files, and the information from the resume files is deleted. The information from the functions in step #3 is moved. Note: the "Race" field does not appear on the Resume EEO Information window. It can be recorded on the Applicant EEO Information window, however.

5) If the user does not enter Resumes, Applicants can be added directly into the system. To perform a search for qualified candidates, use the Candidate Worksheet and search the Applicants file.

6) To search for qualified candidates among existing employees, use the Candidate Worksheet and search the Employees file. Note: only one file can be searched at a time. To search the Resumes, Applicants, and Employees files, you would have to do three separate searches.

Once you have a list of qualified candidates on the Candidate Worksheet, you can do the following:

Print Candidate Profiles (prints selection criteria and qualifications of candidates)  
Activate person as Applicant (if data was originally entered as a Resume)

7) When you have determined who the finalists are, highlight them from the Candidate Worksheet and access the Finalist Worksheet.

8) Once you have a list of qualified candidates on the Finalist Worksheet, you can record several things:

- Pre-Hire Tracking
- Pre-Hire References
- Pre-Hire Testing
- Pre-Hire Interviews

9) From here you can activate a finalist as an employee, which brings you to the Employee Personal Data window. Data from the Applicant files are brought over to Employee files (address, education, skills, etc.). Data is retained in the Applicant files.

The above steps are not necessary to hire a new employee. If requisition, resume and applicant data is not entered, you can add an employee directly through the Activate New Hire function or by clicking the Add button on the Employee Direct window. You would then enter any information regarding education, previous employment, skills, etc., in the appropriate employee files, rather than having them copied over from Applicant files.

## Candidate Worksheet

The Candidate Worksheet is used to search for qualified candidates who will be considered for an open position. The system needs a few pieces of information in order to perform the search. The four buttons on the left side of the button bar are:

Identify Position

Locate Position

Primary Selection Criteria

Secondary Selection Criteria

When you click on Identify Position, the system will display a window where you select a Job Title. The drop down list contains all job titles from the Job Title Information function. When you have selected a job title, the skills, training and certifications that have been associated with it will display. Click Select to use this job title or Cancel to exit the window without making a selection.

Once you have selected a job title, click on the Locate Position button. A list of organizations that have this job title set up in Position Control will be displayed. (The position has to exist in Position Control before you can perform a candidate search.) Select the organization where you wish to fill the position. Please note that Identify Position and Location Position do not have to be performed in a particular order; you can select the job title first, or the organization first. However, you need both these pieces of information to access the Finalist Worksheet. You can also search a file based on Secondary Selection Criteria only, or Primary Selection Criteria without a job title. The search is only initiated upon exiting the Primary Selection Criteria window.

The third button brings you to the Primary Selection Criteria window. Here, the skills, training and certifications that are required by the selected job title will be displayed. You can add to these lists, or delete selection criteria as you wish. You may also enter degrees that you wish this person to have. You can select “Willing To Travel” and/or “Willing To Relocate”. Only people with all of the criteria will be selected. Choose the file that you wish to search: Employees, Applicants or Resumes. (When searching the Employees file, the system will search for all employees, not just those people in the selected Organization Structure.) Click on Select to begin the search.

The system will display a list of candidates who have all of the primary search criteria that you defined. If it did not supply you with enough candidates, you may want to eliminate some of the search criteria that may not be absolutely necessary to fill this position. If the system came up with too many candidates, you may want to add additional criteria to narrow the search.

To enter more search fields, click on Secondary Selection Criteria. On this window, you may specify states from which people should be selected, or areas of interest for which people have indicated a preference. The “state” search will use either the Resume, Applicant or Employee Address data. Areas of Interest will use Resumes Areas of Interest, Applicant Job Interest Information or Employee Areas of Interest, depending on which file you choose to search. When using secondary criteria in addition to primary criteria, the search will bring up people with all of the primary criteria, with or without any of the secondary criteria. The Match Ratio column will show you how many secondary criteria the person met, as well as the total number of secondary criteria requested. For example, if eight criteria were selected and two were matched, the Match Ratio would display “02/08”. If none of the secondary criteria were met, the Match Ratio would display “00/08”. The Secondary Match column displays the match ratio as a percentage. In this example, the person with two out of eight criteria would have a Secondary Match of 25% (2/8).

When you have a list of candidates to be considered, word processing links are provided if you wish to create letters to send to any or all of these people. Highlight the candidates to receive the letter; follow word processing instructions for the creation and printing of the letters.

To print a Candidate Profile report, select the people you wish to print and click the Candidate Profile button. You will be brought to your word processing package, and each person's information will appear on a report, in addition to the selection criteria that you had entered. This document can be saved and/or printed.

To move some or all of the candidates to the Finalist Worksheet, highlight the people who will move on to the next step. Click on the Finalist Worksheet button.

If you have previously performed a search for this job title and organization structure, a window will appear which contains the results of the past search(es). At this time, you may click the Append button to add the new candidates to the prior candidates, or click on the Remove button to delete the prior candidates from the current process. As an example, you may have searched for and hired a programmer six months ago. In that case, you would probably want to delete the prior candidates. However, if you are currently searching the employee, applicant and resume files, you will be bringing over each of the three groups of candidates separately. In this case, you would want to append the new candidates to the existing candidates. You are then brought to the Finalist Worksheet window.

## Finalist Worksheet

Multiple selections can be made on the Finalist Worksheet, to process candidate tracking functions, print candidate profiles, activate new hires or connect to your word processing package. There are several types of data that can be recorded for each finalist:

Pre-Hire Tracking function allows you to enter all activity related to this candidate.

Pre-Hire References allows you to enter the result of reference checks.

Pre-Hire Testing allows you to enter the results of pre-employment tests.

Pre-Hire Interviews allows you to enter results of screening interviews.

### *Pre-Hire Tracking*

#### Set-up:

- COD table: Applicant Stage Code

When the Pre-Hire Tracking function is accessed, information can be entered regarding the stages that the finalist passes through. Information such as interviews, testing, and references can be stored in the system. When a tracking record is added, the applicant stage code is entered in addition to other information regarding this event. When you click on the Work With Event button, the system will access the following functions based on the Type of Activity in the Applicant Stage Code. Please see the appropriate section for instructions on each function.

<u>Applicant Stage Code</u>	<u>Function</u>
I	Schedule Interviews
R	Pre-Hire References
T	Pre-Hire Testing

### *Pre-Hire References*

#### Set-up:

- COD table: Reference Type, with link to word processing document containing sample questions
- Directory Defaults: Word Path (to access word processor); Reference Path (to store documents)
- Reference Question Builder: add reference questions by type of reference
- Word processing document containing reference questions for each type of reference.

When the Pre-Hire References window is accessed, the finalist that you chose will appear on the screen. You can also access other applicants or employees from this screen. A reference is added, and, based on the type of reference, is linked to a document via the Open Selected References button. (If no document was entered, this button will not be active.) When this button is clicked, the document shell from the Reference Path will be opened and stored as a new file. Based on the questions contained in the shell document, you can enter the responses of the person who was contacted for a reference. The second button on the screen allows you to create a shell document. Clicking on the Create Sample Reference button accesses the word processor in your Word Path. The Reference Question and Answer List Screen button will bring you to a window which contains the reference questions that you set up for this particular type of reference via the Reference Question Builder function. Answers to these questions can be entered here. If a hard copy of the reference results is required, it would be better to use the Open Selected References option, since the document can be printed from the word

processor. Additional information can also be stored in the document, whereas the Reference Question And Answer List Screen only allows for answers to predetermined questions. You may use one or both of these functions for each reference.

### ***Pre-Hire Testing***

#### Set-up:

- COD tables: Test Services; Test Type
- Directory Defaults: Word Path (to access word processor); Applicant Testing Path (to store documents)
- Test Definition (function)

Access the Test Definition function and enter the types of tests that each service offers. A document shell is linked to each test type. For each test, categories are entered which contain the lowest rating and highest rating.

For the finalist, an entry is made which contains the Test Service and Type Of Test. When you access the Open Selected Tests button, your word processor is opened with the document shell defined in the Test Definition function. (If no document was entered, this button will not be active.) It is saved as a separate file for this finalist/type of test. Answers to test questions can be entered here, and then saved and printed. The Create Sample Test button will open your word processor, where you can create a document shell. The Testing Question And Answer List Screen button will bring you to a window where all of the test categories are displayed. The finalist's score for each of the categories can be entered here.

### ***Pre-Hire Interviews***

#### Set-up:

- COD table: Applicant Stage Code, where type of Activity is "I" (interview), and containing link to word processing document containing sample interview questions
- Directory Defaults: Word Path (to access word processor); Interview Path (to store documents)
- Word processing document containing questions for each type of interview.

Interviews are scheduled via this function. The date, time and place, as well as the employee who will be the interviewer, are entered. By clicking on the Open Selected Documents button, you are brought to the word processor and the document shell from the Applicant Stage Code is accessed. The new document is saved as a separate file for this finalist, in the Interview Path. The Create Sample Document button can be used to access your word processor and enter interview questions. This document can be stored and linked to an applicant stage code.

# Finalist Worksheet

Pre-Hire Tracking

If Type of Activity = "R" and Work With Event is selected

If Type of Activity = "T" and Work With Event is selected

If Type of Activity = "I" and Work With Event is selected

## Pre-Hire References

Set-up: Applicant Stage Code COD value has Type of Activity = "R" (Document field doesn't seem to do anything); Reference Question Builder is set-up for each type of reference; Directory Default entered in References Path. Processing: Enter reference, then use Ref. Q&A to record answers. Based on Type of Ref, go to Ref Type COD to get document name for Open Sel Ref. If no document name exists for Ref Type, Open Sel Ref will not be active. Create Sample Reference can be accessed (goes to Word with no pre-loaded doc name).

## Pre-Hire Testing

Set-up: Applicant Stage Code COD value has Type of Activity = "T"; Test Services has a document shell, and test categories; Directory Defaults entered in Applicant Testing Path. Processing: for each test, enter answers to the test categories in Testing A & Q List Screen. You can Create a Sample Test. When you access Open Sel Tests, it will call in the document shell from Test Services and assign a doc name for this person and test combination.

## Schedule Interviews

Set-up: Applicant Stage Code COD value Type of Activity = "I"; Shell Document Name is Word document where interview shell is stored; Directory Default is Interview Path. Processing: when interview is highlighted and Word is accessed, shell is opened and doc name assigned. Create Sample Document goes into Word with no pre-loaded doc name.