Manager Self Service

Taleo Reference Guide for Hiring Managers

Children's MINNESOTA

Taleo Reference Guide for Hiring Managers

Contents

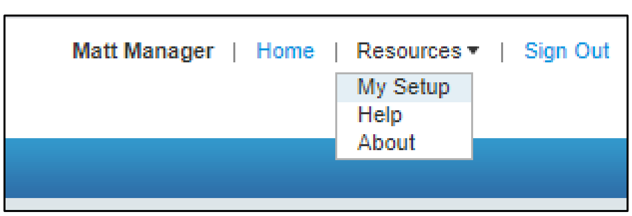
Taleo Reference Guide for Hiring Managers

1. Sign In

Log into Taleo via Manager Self Service with your network user name and password and click on the "Open Jobs" tile. A new window will open, requiring a second sign in. Enter your network user name and password.

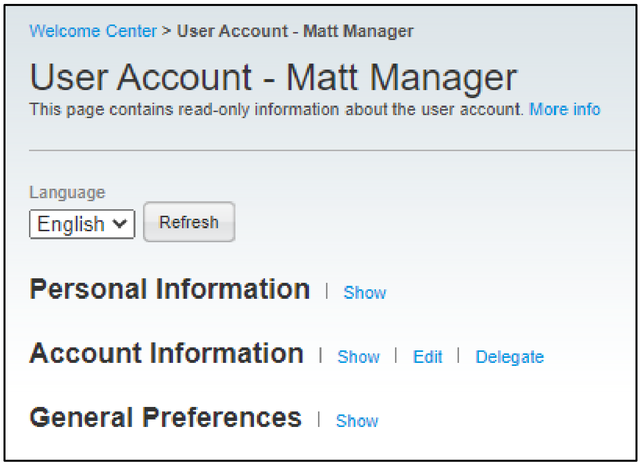
2. Set General Preferences

1. Access your profile to setup your preferences, Locate the Resources dropdown in the top right corner of the page and click "My Setup". This step is needed to setup default fields for your requisitions and the approval paths needed for your requisitions and will not need to be updated unless reporting structures or approval processes change.

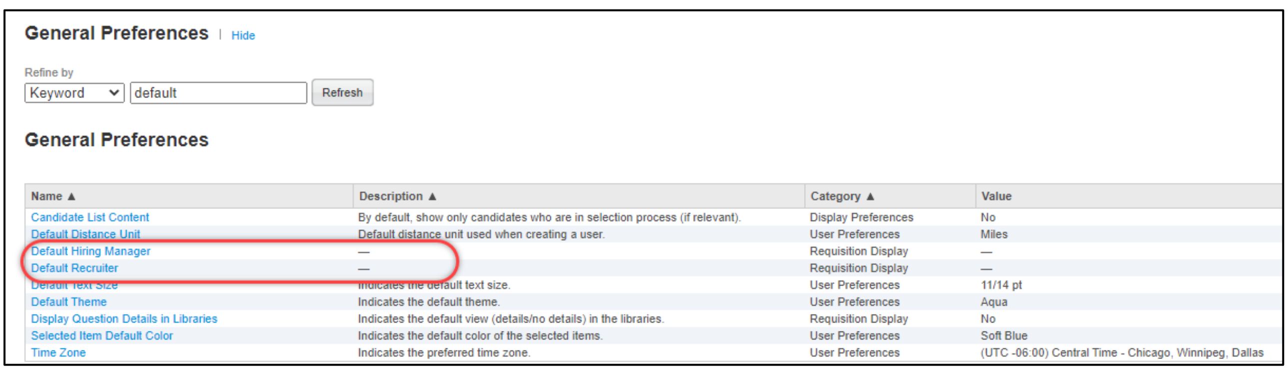


2. Your General Information will be pre-populated based on your user account.

3. The **General Preferences** allows you to edit your General Candidate and Requisition Preferences. To change these items, click “Show”.

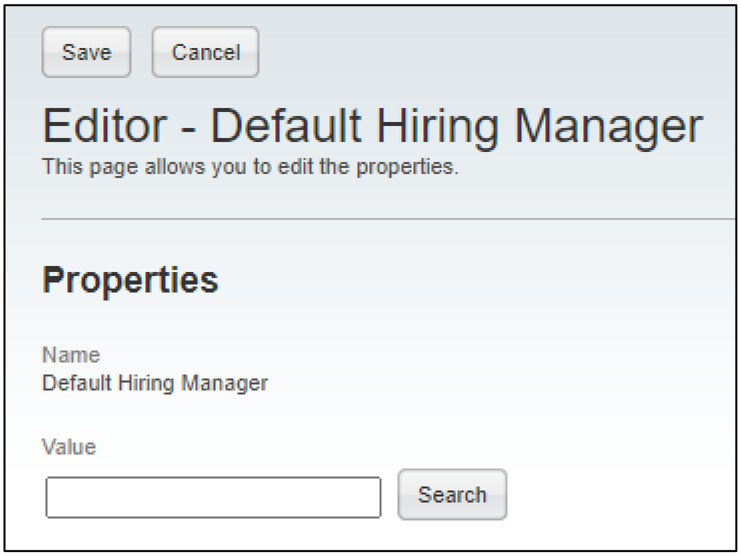


4. Search using keyword “default” so that you can select your default Hiring Manager and Default Recruiter for each Position you create.



Name ▲	Description ▲	Category ▲	Value
Candidate List Content	By default, show only candidates who are in selection process (if relevant).	Display Preferences	No
Default Distance Unit	Default distance unit used when creating a user.	User Preferences	Miles
Default Hiring Manager	—	Requisition Display	—
Default Recruiter	—	Requisition Display	—
Default Text Size	Indicates the default text size.	User Preferences	11/14 pt
Default Theme	Indicates the default theme.	User Preferences	Aqua
Display Question Details in Libraries	Indicates the default view (details/no details) in the libraries.	Requisition Display	No
Selected Item Default Color	Indicates the default color of the selected items.	User Preferences	Soft Blue
Time Zone	Indicates the preferred time zone.	User Preferences	(UTC -06:00) Central Time - Chicago, Winnipeg, Dallas

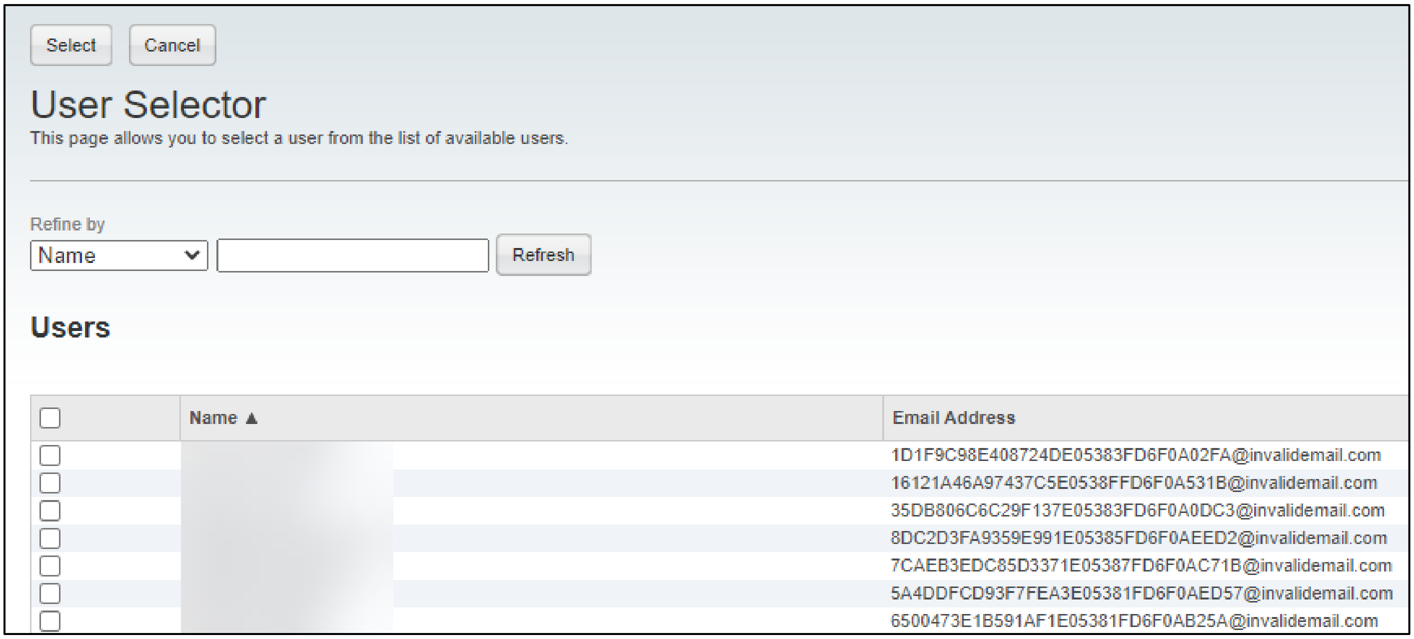
5. To set yourself as the default Hiring Manager, click Default Hiring Manager and Edit. Search for yourself and click save.



6. Follow the same process to select a Default Recruiter for your requisitions.

7. Search using keyword “Frequent” to select your **Frequent Collaborators.** This allows you to select users who will have access to the positions you create. If added here, they will be pre-populated but you will have the option to remove them from positions if needed. You do not need to add your Talent Acquisition Consultant (TA Consultant) as a collaborator, as they can already view your requisitions.

8. To add a Collaborator, click Add then use the selector to choose a user.

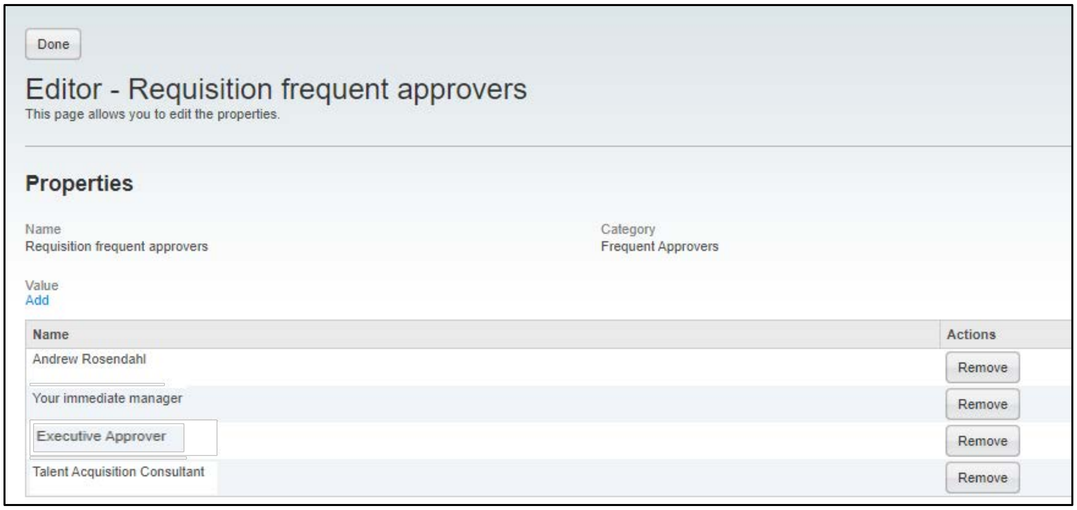


Add your director or executive in the Collaborator list if they want to view the details of a requisition after it is approved. To remove a collaborator after you have selected them, click Remove. Once your selections are complete, click Done.

9. Follow the same process to add **Frequent Approvers.** This allows you to create a short list of approvers for both Requisition Approval and Offer Approval. At this time, set up the requisition approval path that is needed for your positions.

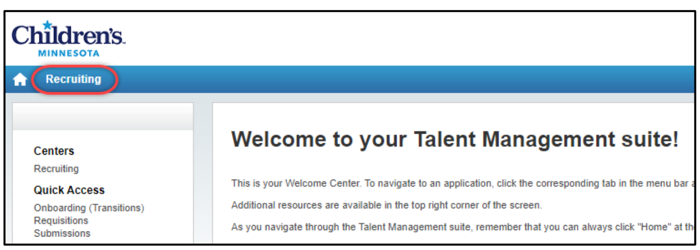
   This should include in order, Finance (Andrew Rosendahl), the hiring leader's immediate supervisor, executive sponsor, and your TA Consultant. If others need to be added, please add them in the appropriate order. Offer approval is currently used within HR only and does not need to be set up.

10. To add approvers, click Add and use the selector to choose a user account. Add approvers in the order they should appear on the approval path.

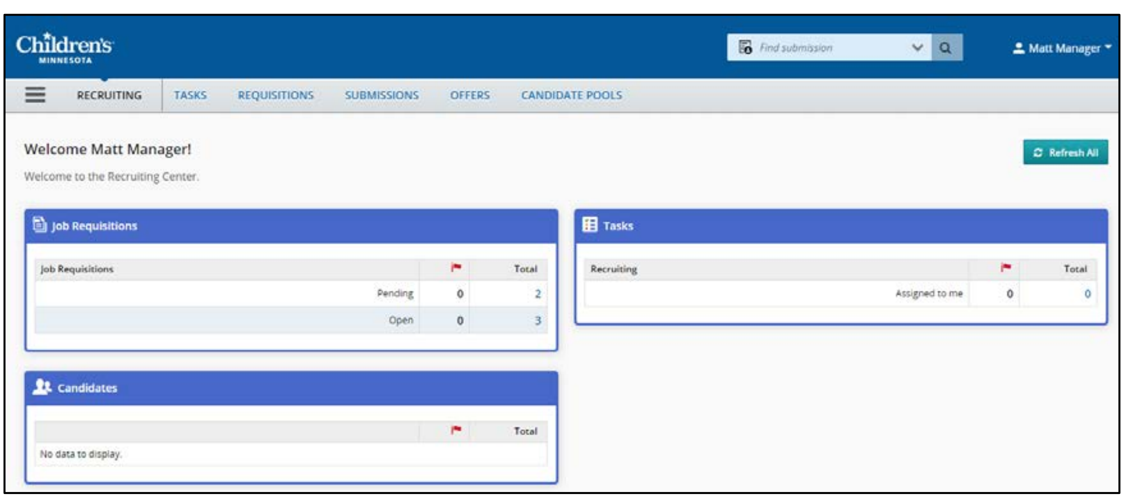


To remove an approver after you have selected them, hover over the name and click Remove. Once your selections are complete, click Done.

11. Once your setup is complete, click Recruiting in the top navigation bar to return to the Recruiting Center.

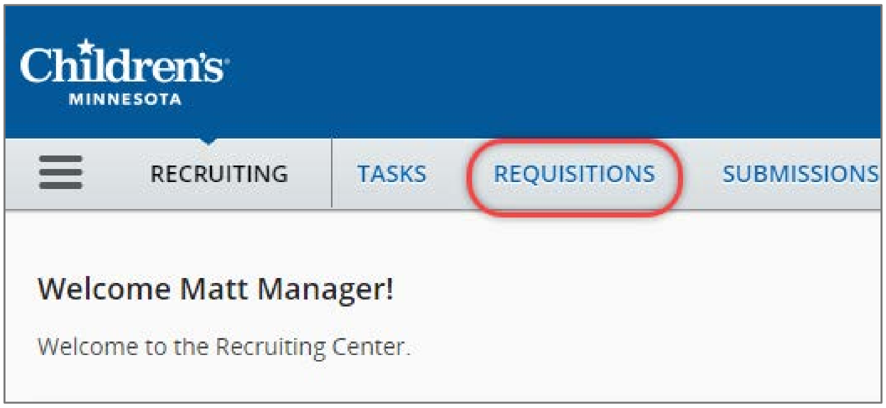


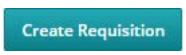
The Recruiting Center will load. This is the home screen for the Recruiting application from which you can a summary of your Requisitions, Candidates, and Tasks assigned to you.



3. Create a Requisition

1. From the Recruiting Center, click “Requisitions”.



2. Click 

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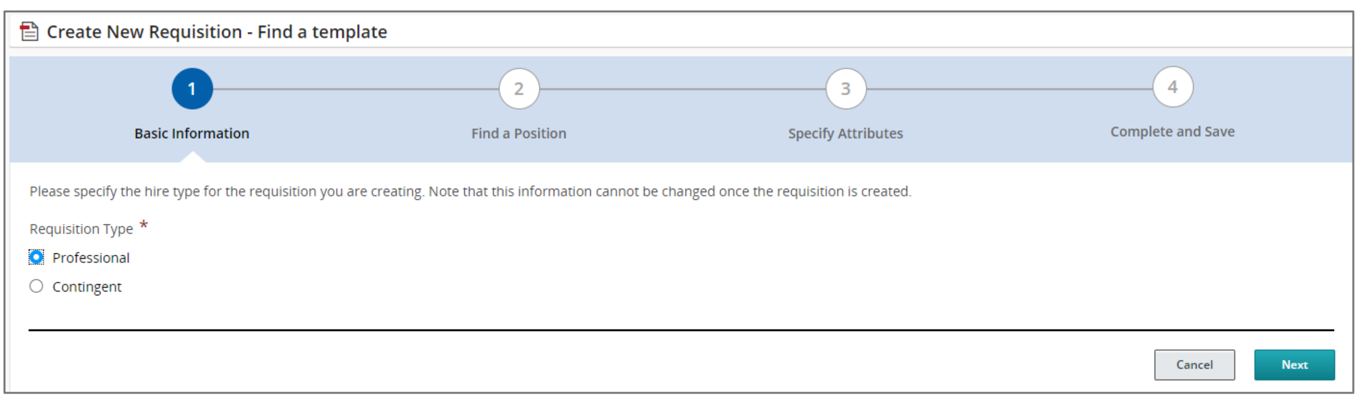
3. Select Use a template.

4. Select the requisition type and click Next.

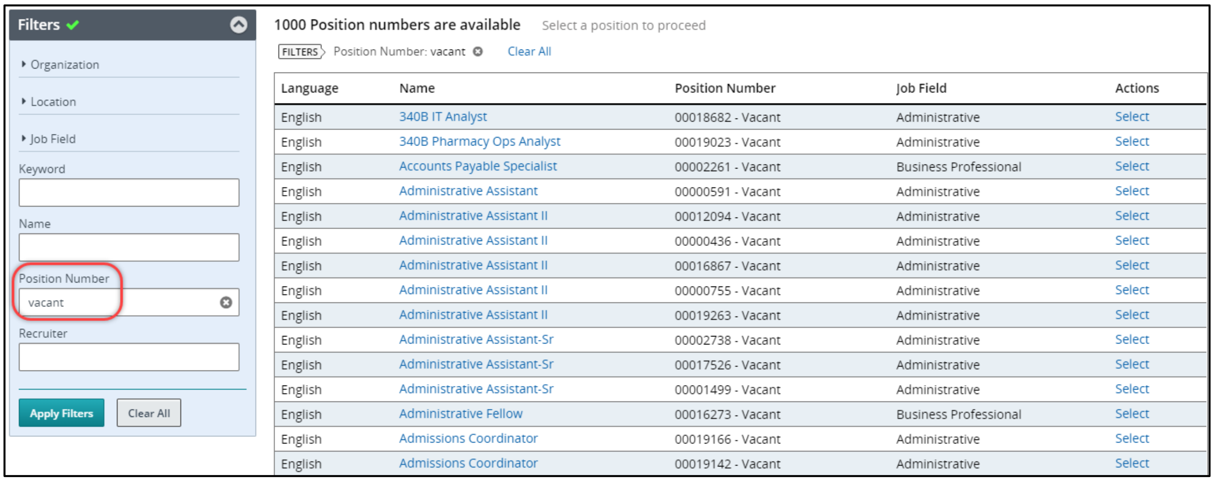
   To hire an **employee**, select requisition type **Professional**.

   To hire a **contingent worker**, select requisition type **Contingent**.

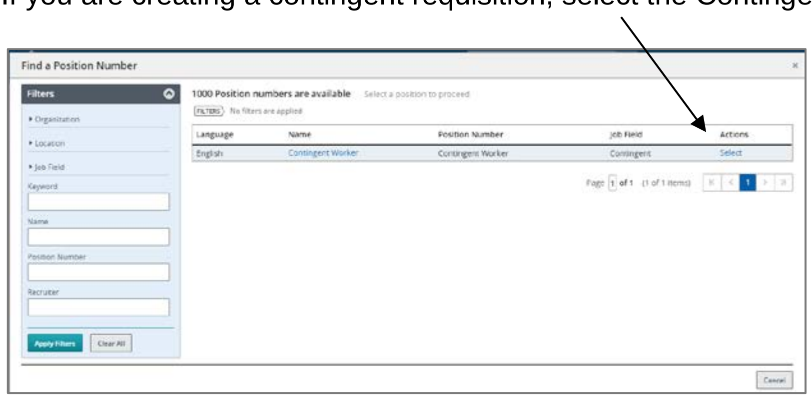


5. Click next to the Position field to open the Position selector. To locate your position, use the Quick Filters to search by Position Number, Posting Title, or the person who is currently in the position. Once you have found the correct position, click Select.

   Note: If you are creating an employee requisition and searching by the person currently in the position, enter their last name in the Position Number field. Otherwise, you can use your **Available Position Number List** under **My Reports** in Manager Self Service to find the correct position number.

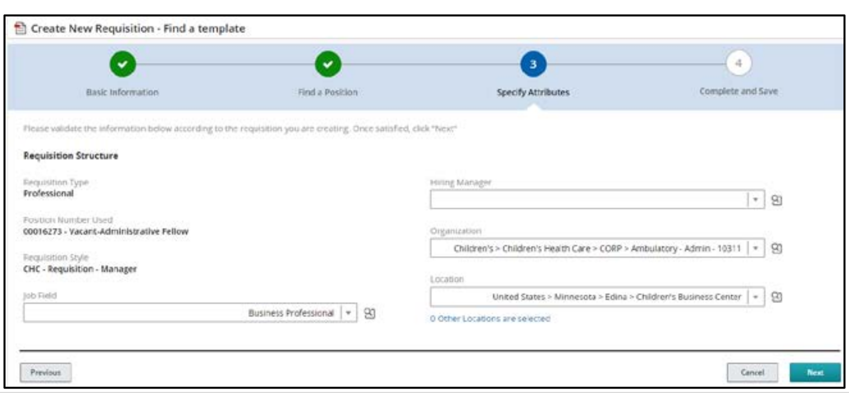


   If you are creating a contingent requisition, select the Contingent Worker template.



6. Click Next.

7. If you have selected a Hiring Manager through your general preferences, you do not need to select a Hiring Manager here as it will populate on the requisition. Click "Next".



8. For **employee** professional requisitions, the Organization, Primary Location, and Job Field will be pre-populated.

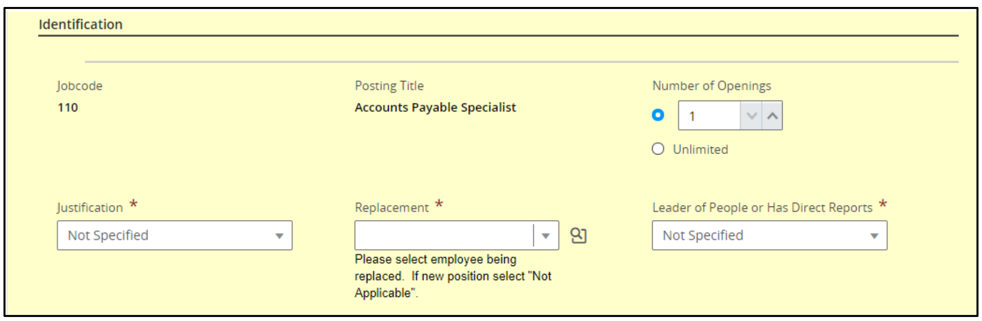
   For **contingent** requisitions, Primary Location and Job field will be pre-populated. You must **select** the **Organization (Department ID).**

   You can add additional locations here if needed, click 0 Other Locations are selected link.

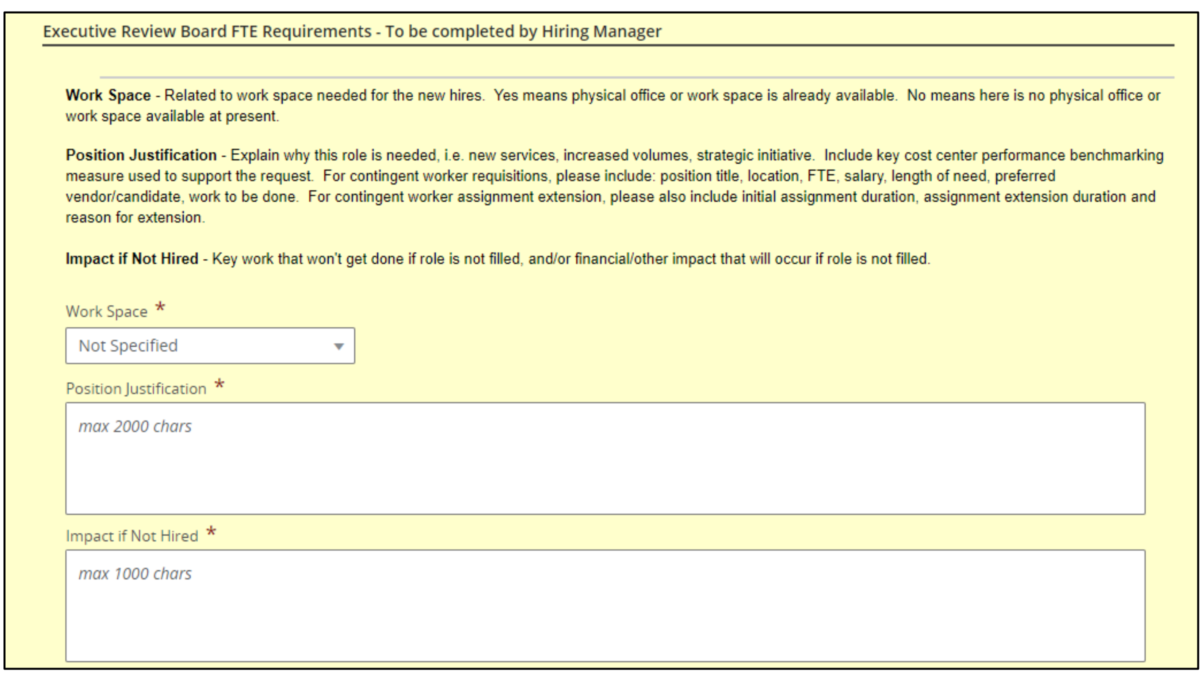
   Note: the location is used by candidates when searching for a position, only add this if they will be working in multiple locations.

   Click Next.

9. In the Identification section, choose the Justification for the position and use the icon to select the person who is being replaced. If it is a new position, select NA - Not Applicable.

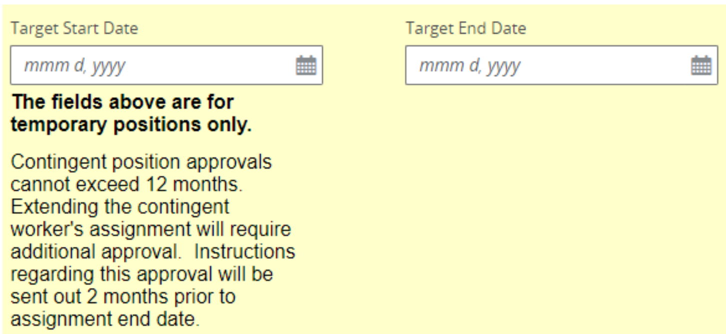


10. Children's leadership requires approval for the recruitment of our professional and contingent worker requisitions. Specific information required for approval is listed under position justification.



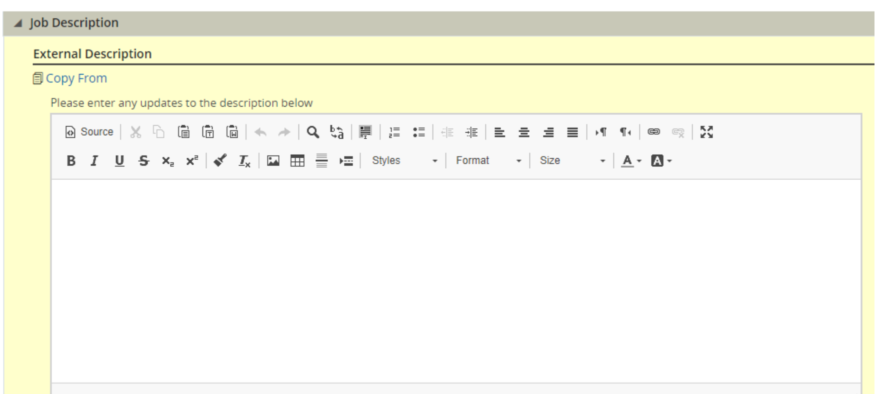
11. Most fields in the requisition have been pre-populated based on the position selected and several of them will be un-editable. Under "**job information**" please verify the FTE, Shift, and Shift Length, then select the Weekend Coverage and Call Coverage fields. If you need to update any of the un-editable fields, use the text box referenced in step 8.

    For contingent worker requisitions, please make sure to complete the Target Start Date and Target End Date.



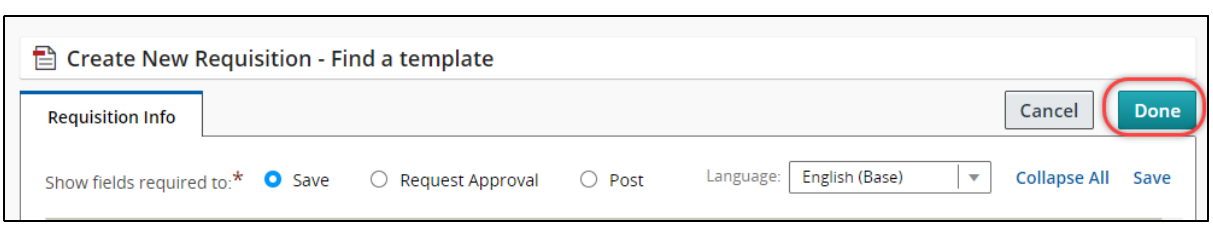
12. For **employee** professional requisitions, the Job Description and Qualifications will be pre-populated and un-editable. If you need to make changes to the descriptions, , or any other fields on the requisition, use the text box provided in the Job Description section.

    For **contingent** requisitions, the Job Description and Qualifications will be blank. You can use the text box provided to add any notes for your TA Consultant.



13. Click on [icon] to indicate which fields might be missing.

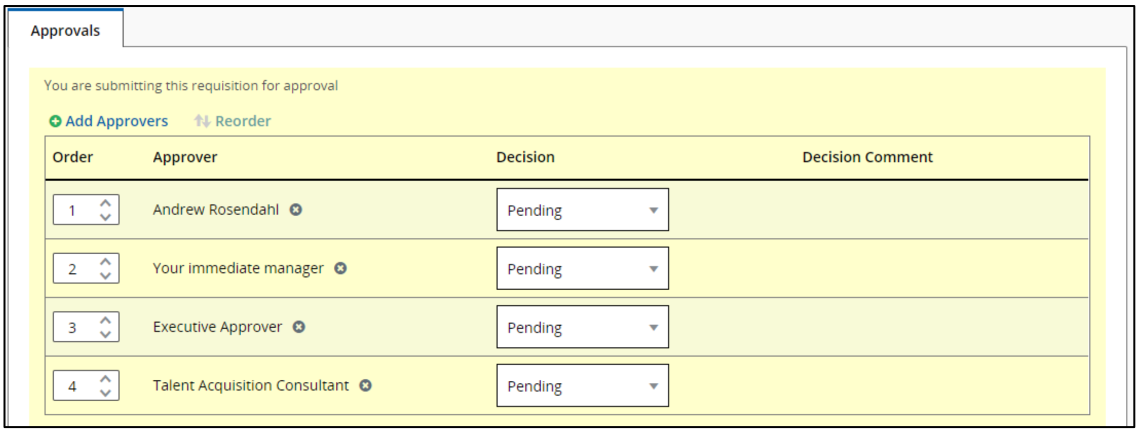
14. Once you have validated the requisition information and provided any required updates, click "Done".



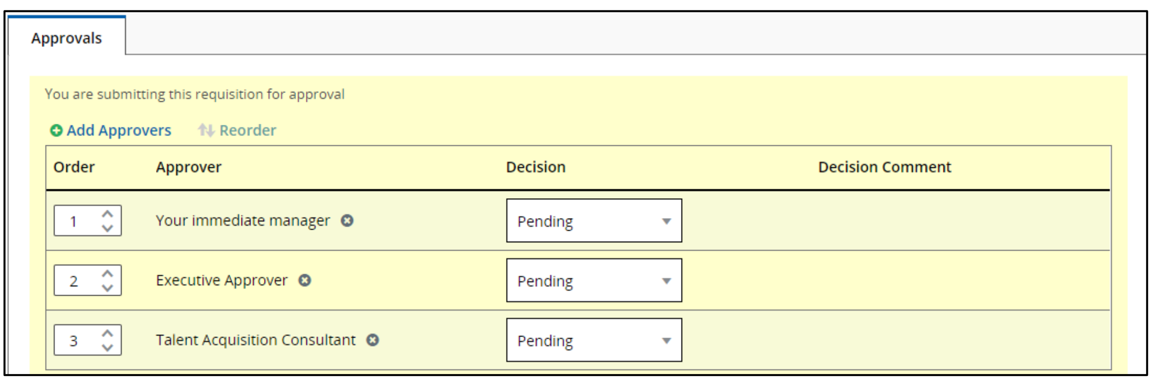
4. Submit for Approval

1. Click More Actions and select Submit for Approval.

For **employee** professional requisitions, the approval path is: Andrew Rosendahl (Finance), your immediate manager, executive sponsor, and Talent Acquisition Consultant.



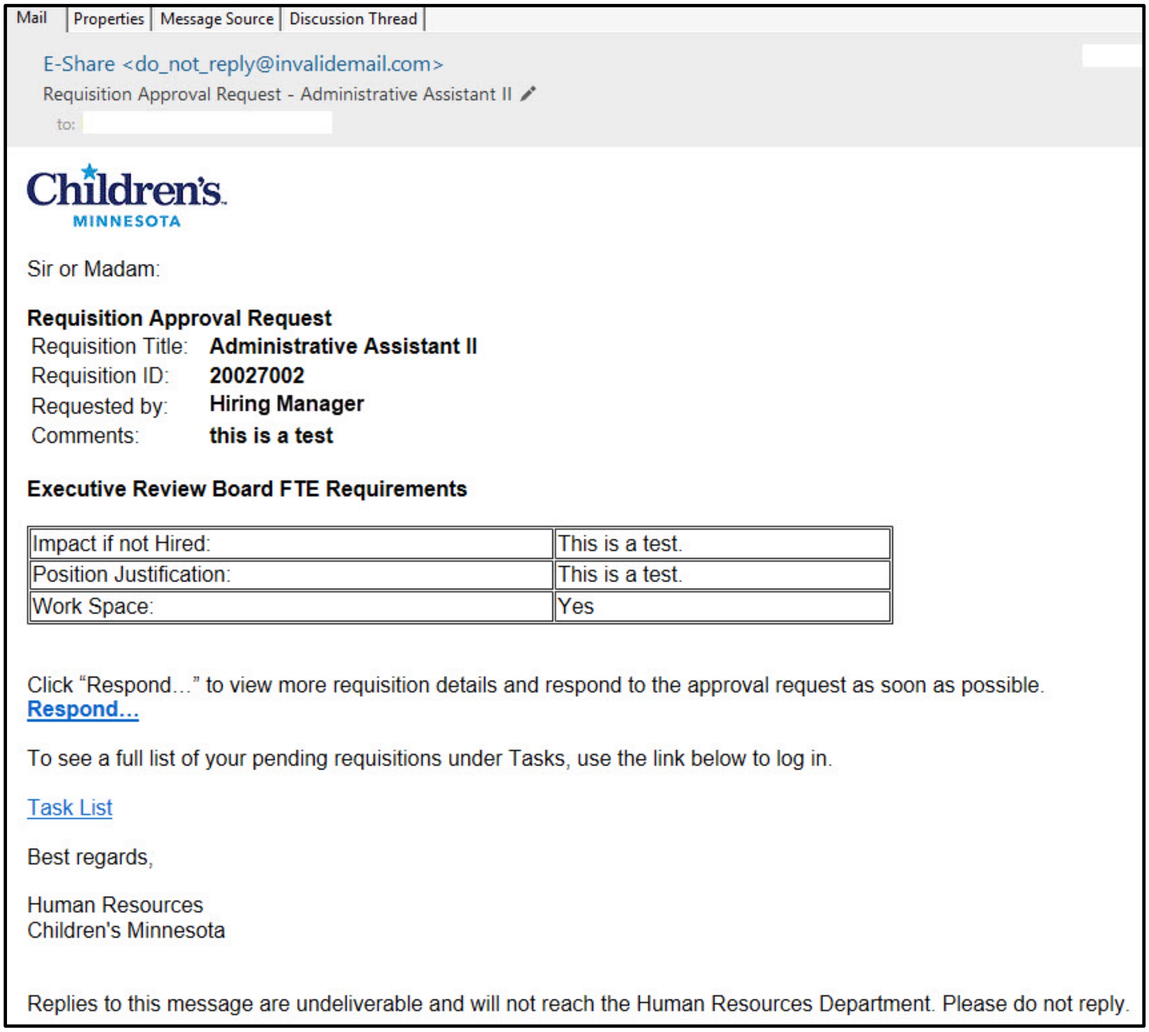
For **contingent** requisitions, the approval path is: Your immediate manager, executive sponsor, and Talent Acquisition Consultant.



2. Check the "**Add the approvers to the list of collaborators defined for this requisition**" to allow approvers to view the requisitions as a collaborator. In the Comments box, enter the reason for filling the position and click on "Done". An e-mail will be sent to the first approver. Once it reaches the TA Consultant, they will approve and you will receive a confirmation email.

5. Approve Requisition

1. An e-mail will be sent to the first approver on the requisition. To approve the requisition, click on the link in the e-mail asking you to respond. It will open a page with links to all the details about the requisition. After the first level approval has been completed, another e-mail will generate to the next approver until it reaches the TA Consultant.



Mail | Properties | Message Source | Discussion Thread

E-Share <do_not_reply@invalidemail.com>
Requisition Approval Request - Administrative Assistant II
to:

Children's MINNESOTA

Sir or Madam:

Requisition Approval Request
Requisition Title: **Administrative Assistant II**
Requisition ID: **20027002**
Requested by: **Hiring Manager**
Comments: **this is a test**

Executive Review Board FTE Requirements

Impact if not Hired:	This is a test.
Position Justification:	This is a test.
Work Space:	Yes

Click "Respond…" to view more requisition details and respond to the approval request as soon as possible.
Respond…

To see a full list of your pending requisitions under Tasks, use the link below to log in.

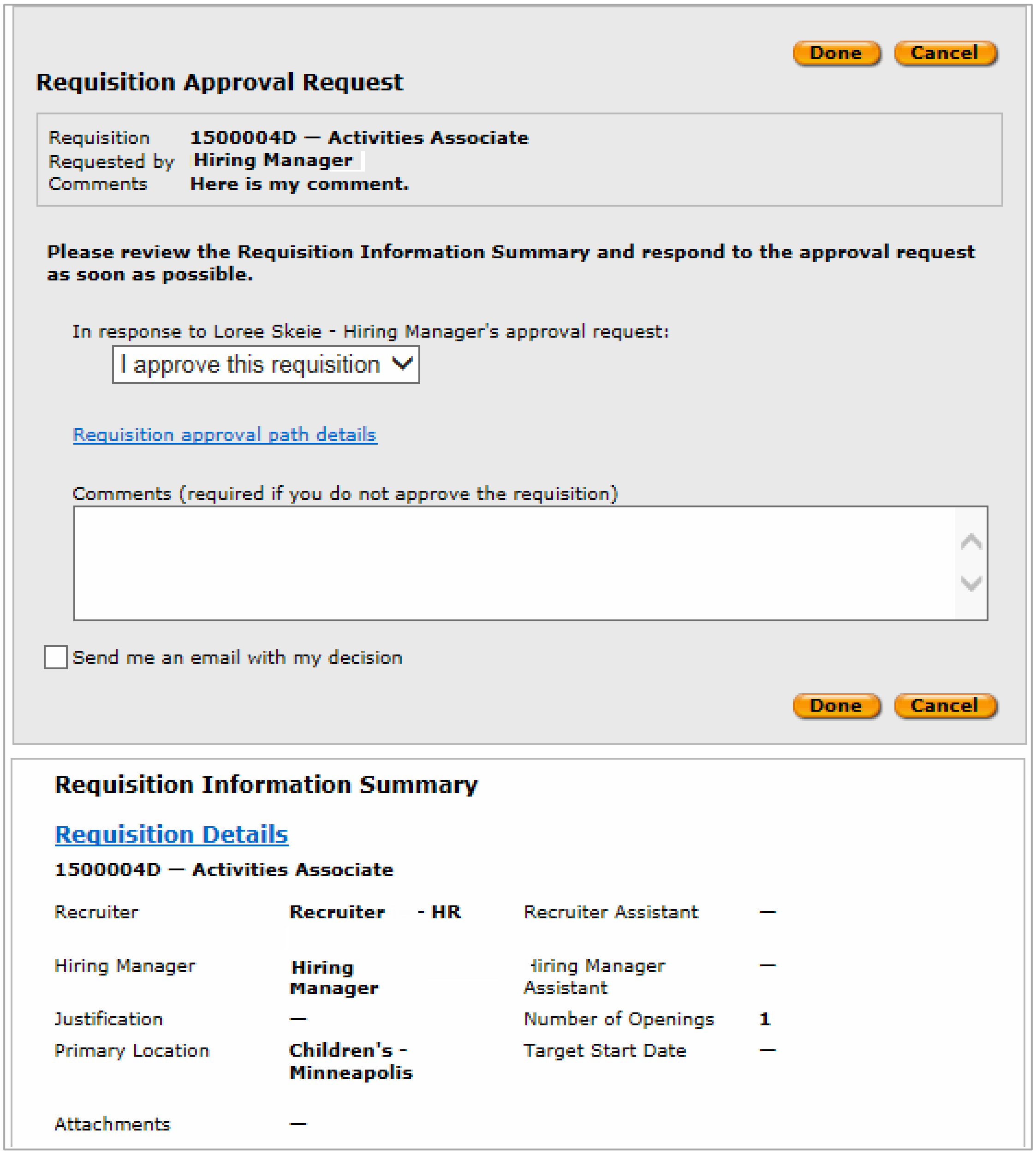
Task List

Best regards,

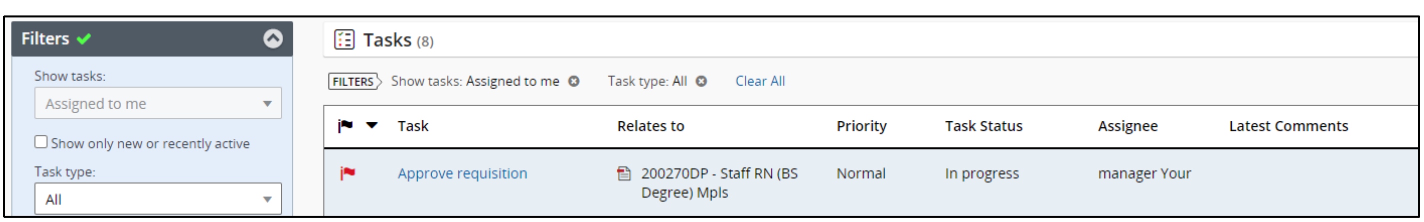
Human Resources
Children's Minnesota

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

2. Use the links to see where the request is at in the approval path or click on the **Requisition Details** to see the full details about the requisition. To either approve or deny the position, select the appropriate response from the drop down and then click **done**. The approval will then route to the next approver.



3. If you use the **Task List** link, a log in screen will appear. Log into Taleo with your CE number and password. To see the details of the requisition, click the Requisition Details link, to approve from this page, use the More Actions**, Decide on Approval.** Otherwise, use the Approve Requisition link to approve.



A confirmation email will be sent to you once all approvers have approved or declined the requisition. The email will contain information about next steps

Children's Human Resources <Childrens_HR_DoNotReply@invalidemail.com> 7/6/2020 9:44 AM
200270IP - Administrative Assistant II approval
to: PeopleSoft WorkflowDevelopment

Children's
MINNESOTA

Your position has been posted.

- If this is a replacement requisition (excluding casual requisitions), your position will be posted but an offer cannot be extended until Clinical core approval. Your TA Consultant will reach out to discuss a recruitment plan if needed. If your request is declined by Clinical Core, you will receive an email.
- If this is a new requisition (excluding casual requisitions), your TA Consultant will reach out to discuss a recruitment plan.
- If this is a casual requisition, your position will be posted. ERB/Clinical Core approval is not required. Your TA Consultant will reach out to discuss a recruitment plan.
- If this is a contingent worker requisition, your position has been approved and your TA Consultant will reach out to discuss a recruitment plan.
- *Please note that extending the contingent worker's assignment will require additional approval. Instructions regarding this approval will be sent out 2 months prior to assignment end date.*

To prepare for the recruitment plan meeting, please consider the following:

- Background/skills/experiences of the ideal candidate
- Interview Process/timeline
- All employees and contingent workers must have 100% clearance of their pre-employment requirements prior to their start date.
- Recruitment will not begin until the recruitment plan has taken place to ensure you are receiving the appropriate candidates.
- For non-contract, all positions must be posted a minimum of 7 business days before an offer can be extended.

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

Children's Human Resources <Childrens_HR_DoNotReply@invalidemail.com> 7/6/2020 10:17 AM
200270IK - Accounts Payable Manager decline
to:

Children's
MINNESOTA

The approval of your position has been declined. Please connect with your executive sponsor for more details.

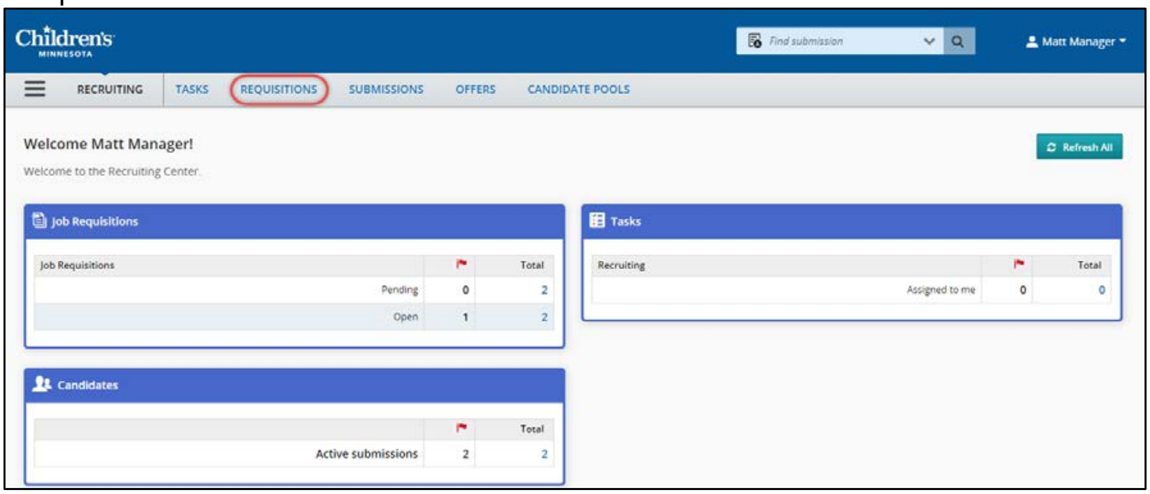
Replies to this message are undeliverable and will not reach the Human Resources Department. Please do not reply.

6. Manage Candidates for Professional Requisitions

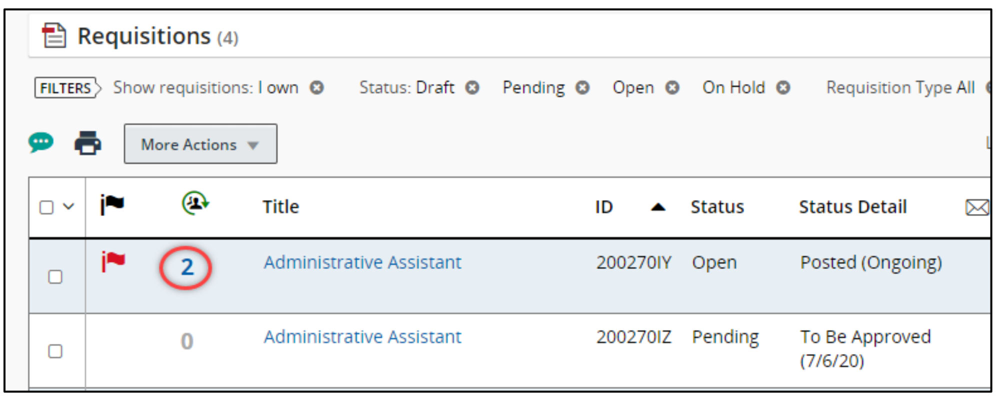
View Candidate Profile and Application for Employee Professional Requisitions

Note: For contingent requisitions, candidates will be sent via email from the agency.

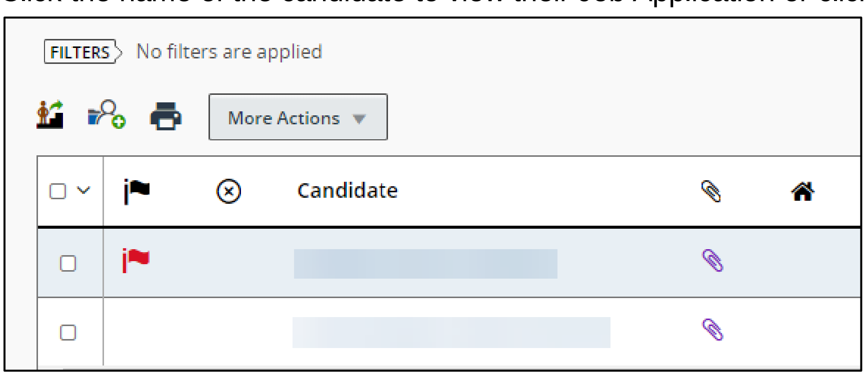
1. To view the candidates that have applied to your requisition, access the Recruiting Center and click "Requisitions".



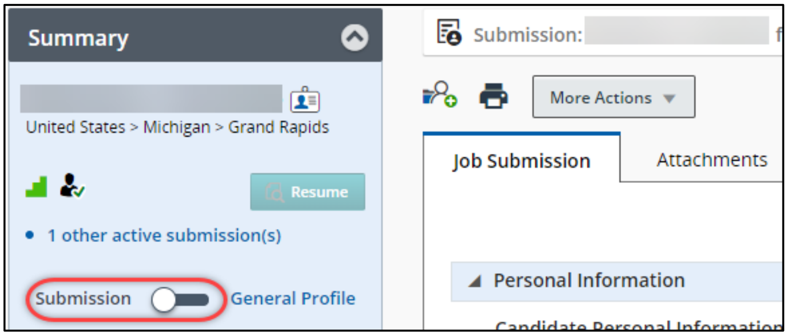
2. Click the blue number to the left of the posting title to view the candidate list.



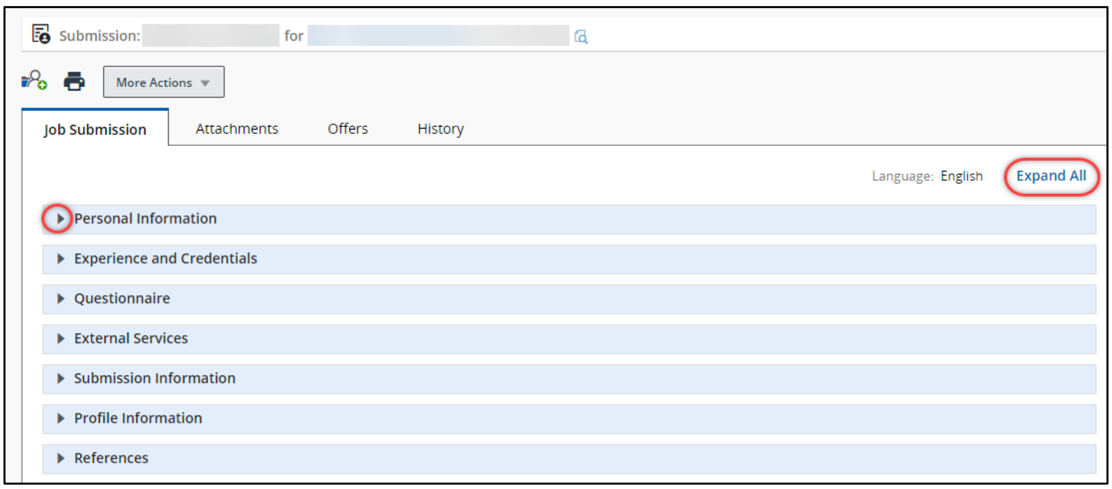
3. Click the name of the candidate to view their Job Application or click on the paper clip to view their resume.



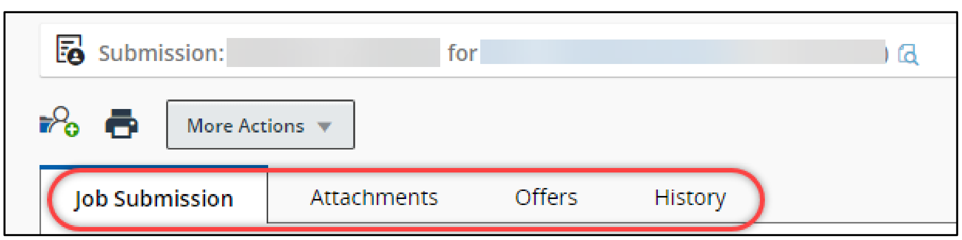
4. The dial is next to “Submission’ which indicates this is job specific, NOT the candidate’s General Profile.
   Note: If one candidate applies to several jobs, they will have multiple job submissions but only one General Profile.



5. Click “Expand All” to expand and review each application section or click the arrow to open the appropriate section.



6. The tabs across the top of the submission allow you to view multiple aspects of this specific submission.



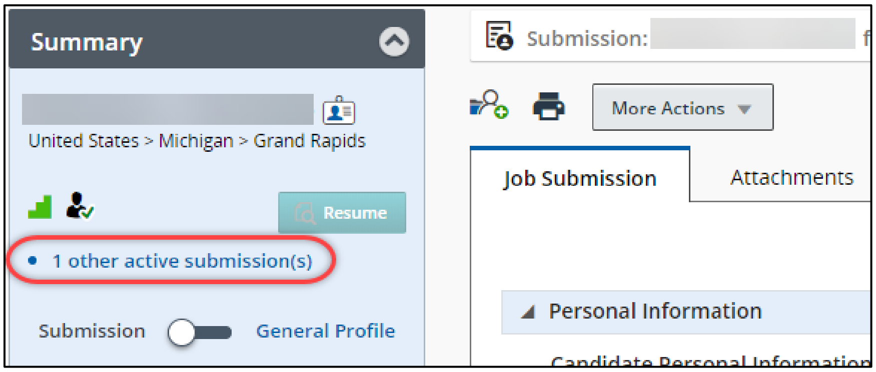
Attachments: Links to any attachments the candidate included with their application. If a candidate has attached a resume, you can view it here.

Offers: The Offers tab will display any offers that have been extended to the candidate as they relate to this job.

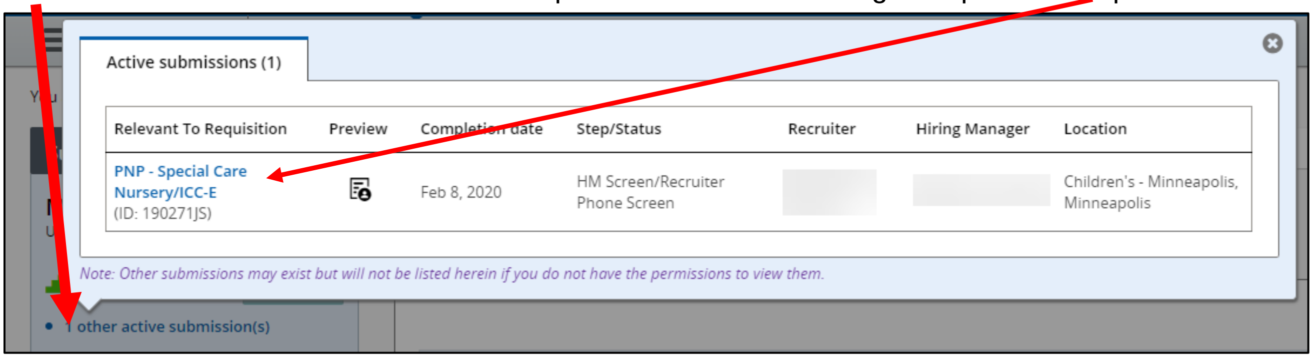
Note: This tab will not be visible until an offer has been created for the candidate.

History: The history tab tracks all action that has been taken on this candidate application.

7. If the candidate has applied to multiple jobs, you can view their other submissions in the blue box at the top left of the page.

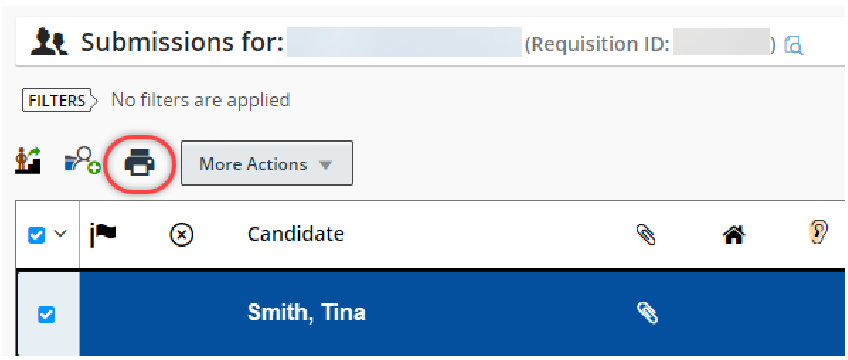


8. Click the blue text to view the title of the requisition. Click the title to go to open the Requisition.



Print Application Information

1. Navigate to the Candidate list on your requisition. Check the box next to your candidate's name, then click the  icon. You can select all candidates by checking the box in the header column at the left side.



2. The print screen will present you with Selection and Content options.

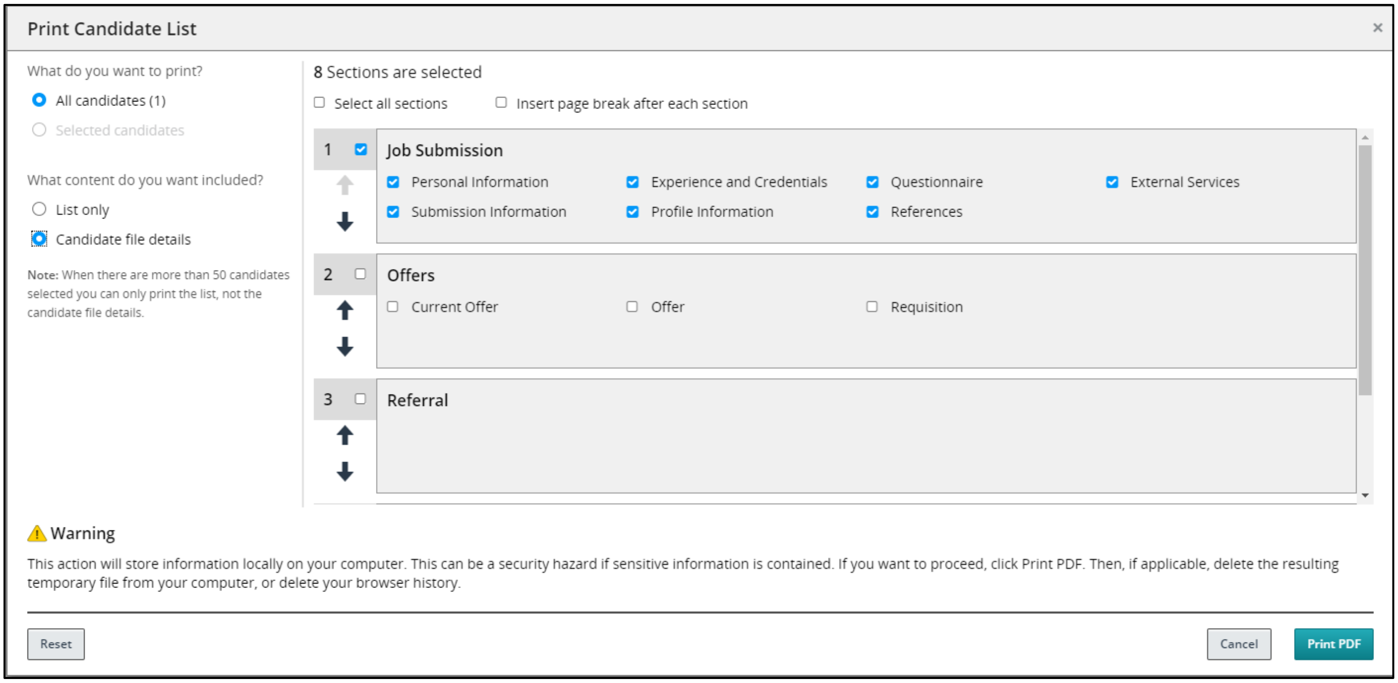
Selection

- All Candidates: Includes information for all candidates on the requisition.
- Selected Candidates: Includes information only the candidates that have a check mark next to their name.
  Note: You can select multiple candidates at once.

Content

- List Only: Prints Candidate List with all of the columns in the candidate view.
- Candidate File Details: Prints application details and attachments.

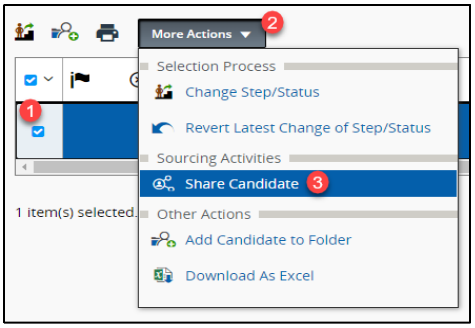
3. If you select Candidate File Details, the window will load a form where you can select which details you would like to print and the order in which you would like to print them. Use the check boxes to select your sections, and the Order arrows to determine their order.
   Note: Attachments will always be printed last.



4. When you click Print, a PDF will load in a web browser containing all of your requested content. Print the PDF.

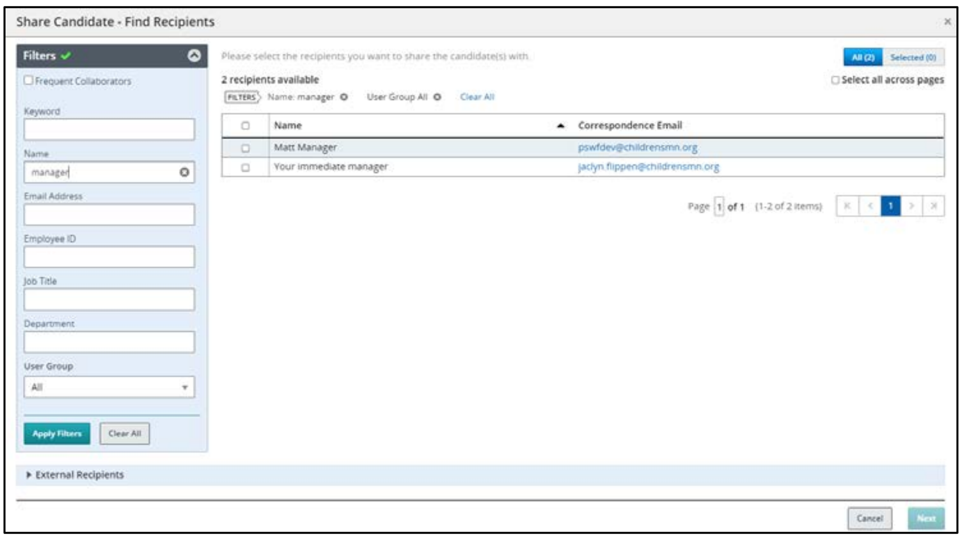
Share Candidates

1. Navigate to the Candidate list on your requisition. Select a candidate by checking the box to the left of the name, then click More Actions > Share Candidate.

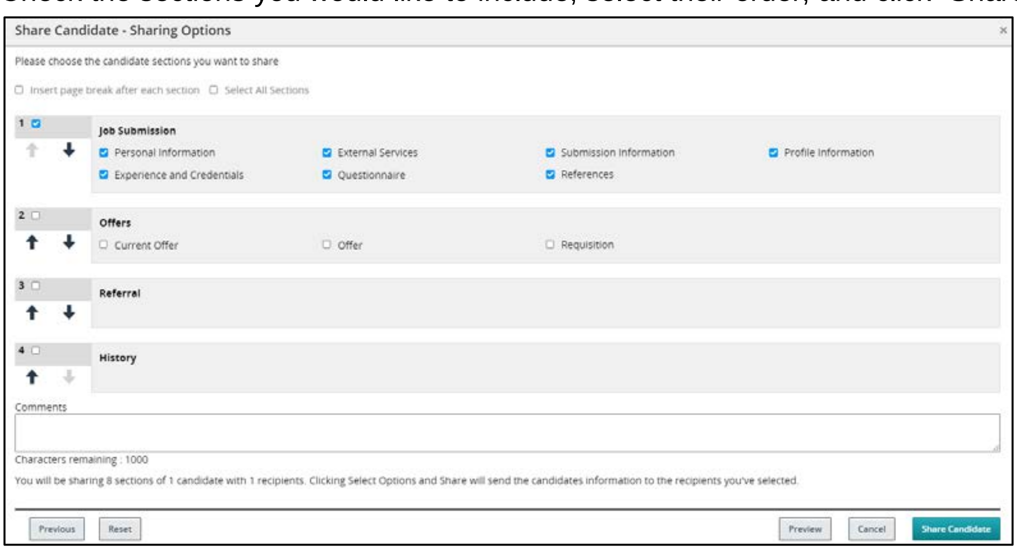


Note: To share multiple candidates at once, check the boxes next to all candidate names you want to share.

2. The Share Candidate window will load. You can filter to your recipient by using the Filters on the left. Select your recipient(s) and click "Next".

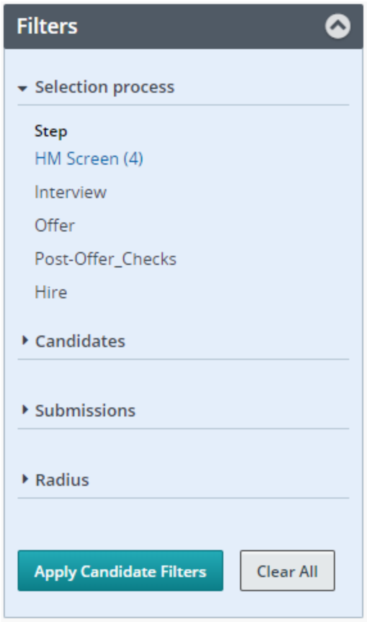


3. Check the sections you would like to include, select their order, and click "Share Candidate".



Move Candidate through Selection Process

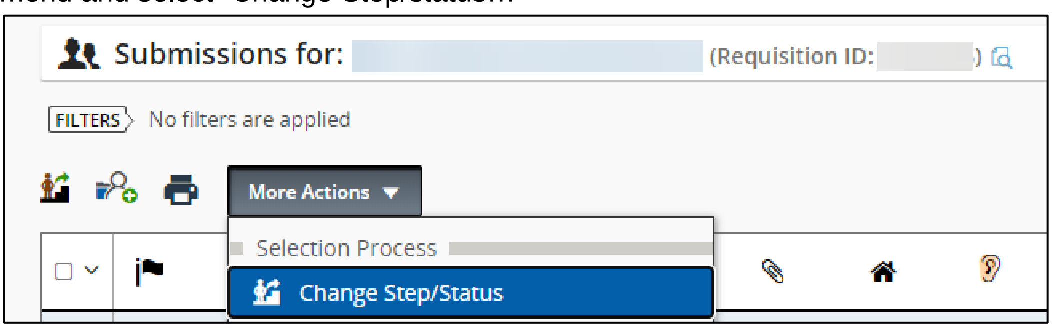
1. Navigate to the candidate list on your requisition. The items listed in the Selection Workflow on the left panel display all of the steps in the candidate selection process. Each step contains sub-steps called statuses. A candidate's step / status combination tracks where they are in the selection process at any point in time.



Depending on the hiring process flow based on service line, the step and status may be different. This image is a sample.

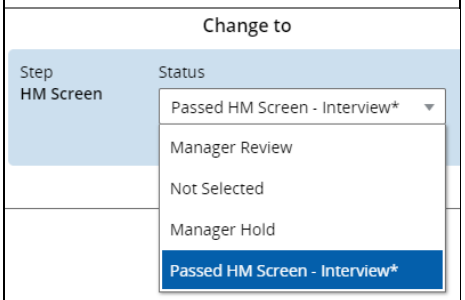
2. As a Hiring Manager, you have the ability to tell a TA Consultant that you would like to move a candidate forward, put a candidate on hold, or decline a candidate by changing their Status in the selection workflow.

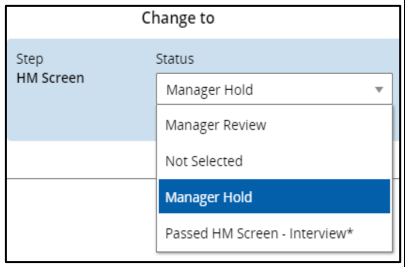
3. To change a candidate's status, check the box next to their name, then click the More Actions dropdown menu and select "Change Step/status…"

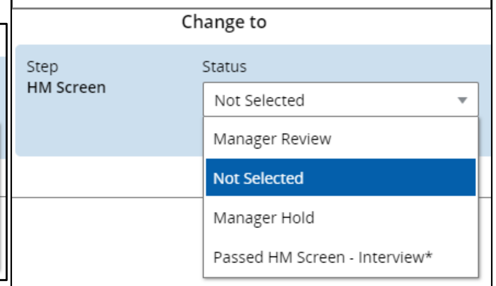


4. If you would like to:

…Move the Candidate to the Next Step	…Manager Hold	…Decline the Candidate
Choose the status with an asterisk (*) at the end. This indicates to the TA Consultant that you would like to move the candidate to the next step.	Choose the Manager Hold status to indicate to the TA Consultant that you would like to hold the candidate.	Choose the Not Selected status to indicate to the TA Consultant that you would like to decline the candidate.



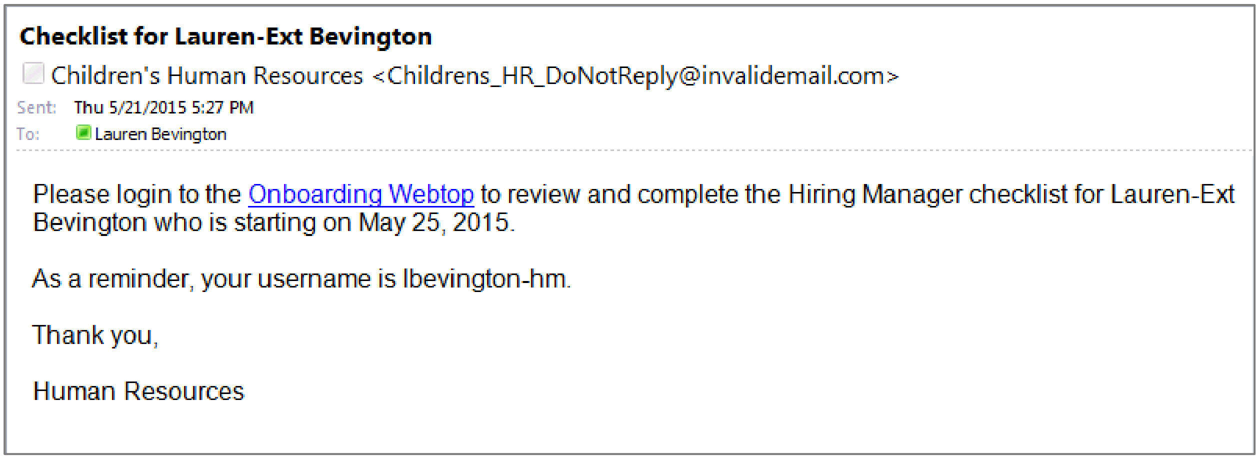




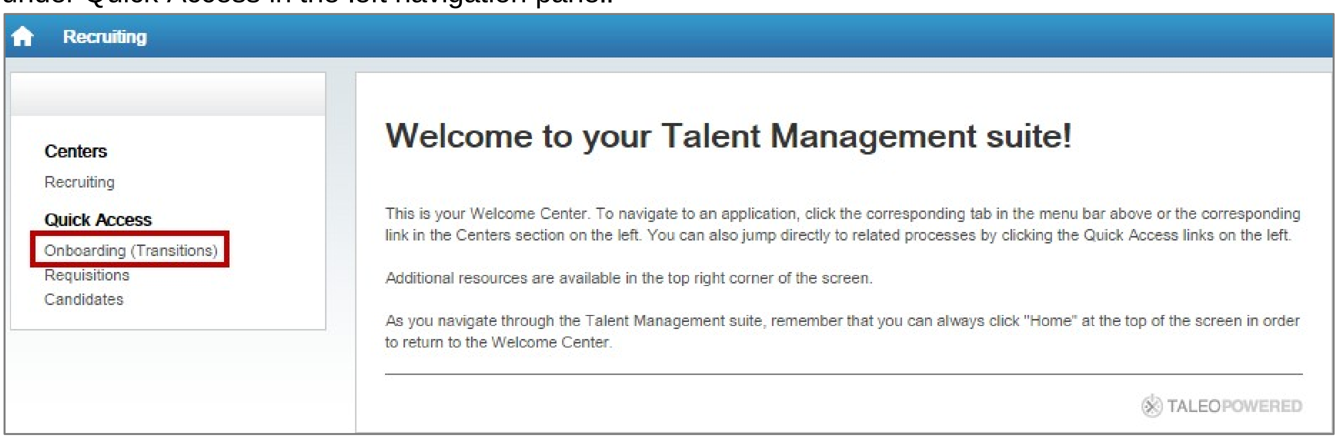
5. Once the candidate reaches the Interviews step, the TA Consultant will need to move them through the remaining steps in the process.

7. Manage Employee Onboarding Tasks

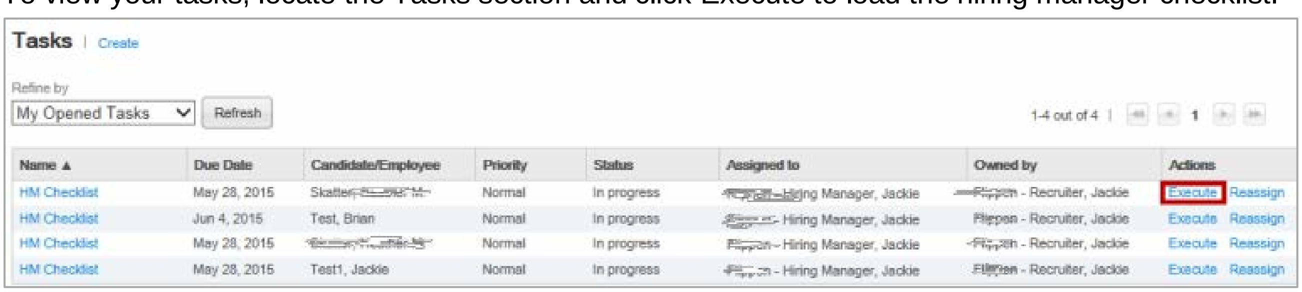
1. Once the employee has completed post-offer checks and moved to hire, they will be emailed a link to access the Onboarding portal to complete their new hire paperwork. You will receive the following email notifying you of the New Hire and directing you to your Hiring Manager checklist. Click the link to access the Onboarding portal.



2. To access the Onboarding portal outside of the email, log into Taleo and click Onboarding (Transitions) under Quick Access in the left navigation panel.



3. To view your tasks, locate the Tasks section and click Execute to load the hiring manager checklist.



4. The Hiring Manager checklist will load, listing all tasks that need to be accomplished prior to the employee's first day; you can print this list. Once you click submit, it will drop off of your Tasks list.

Prior to Employee's First Day

Please check what you have completed.

- [ ] Call employee to welcome, confirm unit start date, and orientation schedule. Discuss when they will be starting in the unit/department and include start and end time, meeting location, who to ask for on arrival, dress code, where to park, etc.
- [ ] Provide new employee with a contact in the event of a question or issue.
- [ ] Submit access request for shared folder(s), distribution lists, shared email, and any special software. Please note GroupWise, Novell, Mandatory Education, PeopleSoft, and Cerner access will be activated on the first day of employment and does not need a specific request.
- [ ] Order basic office furniture and supplies (desk, chair, paper, pen, stapler, etc.).
- [ ] Order business cards and name plate (if needed).
- [ ] Other workspace/role specific access request as appropriate (phone, pager, cell phone, purchasing card, etc.).
- [ ] Determine training team and delegate coordination, validation, and socialization roles as needed.
- [ ] Forward employee information as needed to the training team.
- [ ] Verify that the employee's workspace is clean and prepared.
- [ ] Send an informal announcement to the department announcing the new employee.
- [ ] Prepare materials for first day on the unit/department including general unit orientation checklist, appropriate role orientation checklist, and unit materials.

Once you click "Submit" this task will be removed from your list of tasks. If you wish to keep this task open, please click "Cancel".

Print | Submit | Cancel

Appendix: Recruiting Icon Legend

General Application Information	
	This is a new candidate in the requisition.Their application has not yet been viewed.
	Candidate has provided an answer to a disqualification question that is flagged as 'To Be Verified'. This symbol will remain next to the candidate unless the candidate's answer is changed.
	Candidate is a current employee.
	Candidate is active on at least 1 other requisition.
	Candidate file contains an attachment. Most often this is their resume and/or cover letter.
	Candidate has been Rejected.
	TA Consultant has verified that candidate meets basic qualifications.
Step/Status Indicators	
	Candidate is in New, Screening, or Interviews Step.
	Candidate is in the Offer step.
	Candidate is in the post-offer checks step.
	Candidate is no longer active on any requisitions.
Candidate List Icons – These are the icons in the top bar when you view candidates	
	Adds comments about the candidate that will show up in the 'History' tab. Comments can be made on a job submission or a general profile.
	This is an option for filing candidate applications if you would like to store them in folders within Taleo. Folders can either be personal or shared. To view your folders, click the middle tab in the left panel above where it reads 'Quick Filters'.

	Find candidates with similar credentials to the one you have selected.
	Add the selected candidate to a different requisition.
	Merge the selected candidate files into one. This allows you to choose one as the ‘Master’ copy and the other one to fill in information that the master may be missing.
	Export candidate list data into an Excel document.
	Add an attachment to the selected candidate file.
	Print the candidate list that you are currently viewing.
	Share selected candidate’s information through email.