

PeopleSoft 8.3 Human Resources PeopleBook: Recruit Workforce

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in these books, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook.*

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've

removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

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You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks,* SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks,* SKU PTB814R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section

of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

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Telephone	Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**
Email	Email CPI at **callcenter@conpub.com**.

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	*Definition*
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	*Definition*
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also **Fax Number)**	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	*Definition*
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,*** or ***Telex.***
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the **Process Frequency** group box: **Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**. **Always** executes the request every time the batch process runs. **Don't Run** ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Field	*Definition*
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also **Province)**	State (Province) for address.
Status	Indicates whether a row in a table is ***Active*** or ***Inactive.***
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, "Creating Field Definitions," Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field Click to refresh the Name field after you've edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title — Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.

Prefix and **Name Prefix** — Select a Prefix or Name Prefix, if applicable.

Royal Prefix — Select a Royal Prefix, if applicable.

First Name — Enter the employee's official first name.

Preferred First Name — For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.

Last Name Preference — For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.

Middle — Enter the employee's middle name, if applicable.

Last Name — Enter the employee's official last name.

Suffix — Select a suffix, if applicable.

Second Last Name — For Spanish employees, enter the second surname (mother's surname).

Alternate Character Name — Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters).

Note. You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter.

Warning! Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.

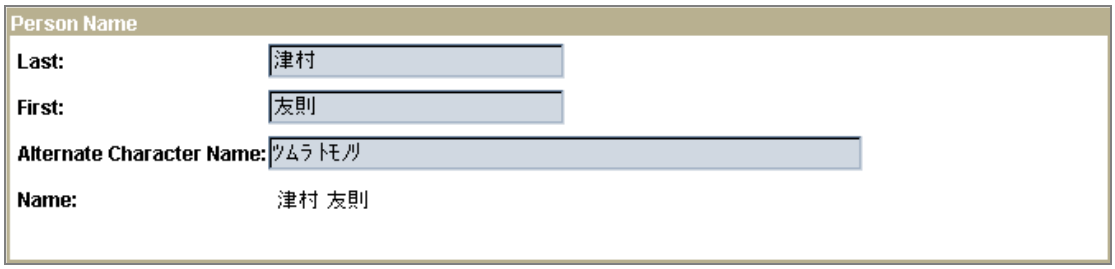
Royal Suffix — Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.

Name — The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays "Last Name[space]First Name," not "Last Name,First Name"; that is, a space separates the last and first names, not a comma.



Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, "Setting Up PeopleSoft HRMS," Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, **Address 2**, **Address 3**, and **Address 4**	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and **Number 2**	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type	Enter the house type, if applicable.
Postal Search	Click **Postal Search** to use international address formats.

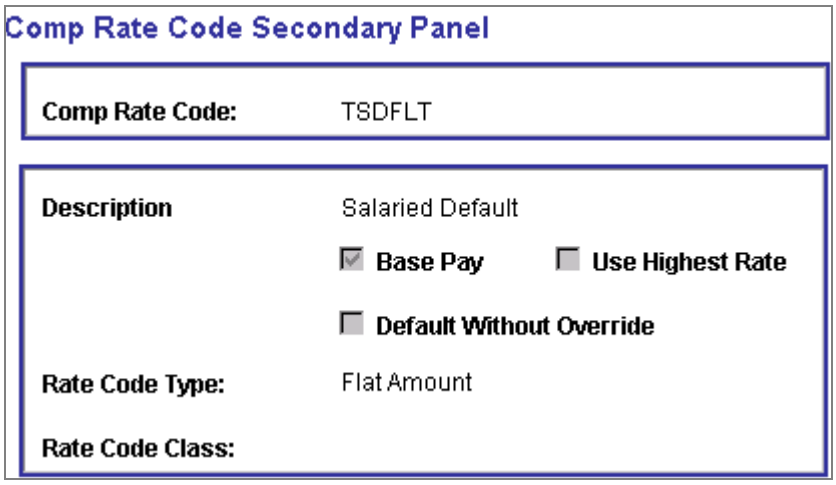
Entering or Viewing Pay Components

Amounts Tab



Pay Components - Amounts

Rate Code	Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid. **Note.** If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.
Seq (sequence)	The sequence number of the rate code if it is used more than once.
Details	Click the **Details** button to open the Comp Rate Code Secondary Panel page.
Comp Rate, (compensation rate) **Currency**, and **Frequency**	The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.
Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for ***Percent*** rate codes.
Points	The salary points associated with this rate code, if any.
Percent	If the rate code rate type is ***Percent,*** the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.
Rate Code Group	A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.



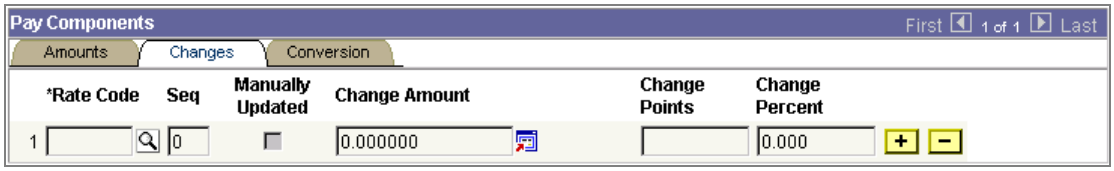
Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," **Defining Rate Codes**

Changes Tab



Pay Components – Changes page

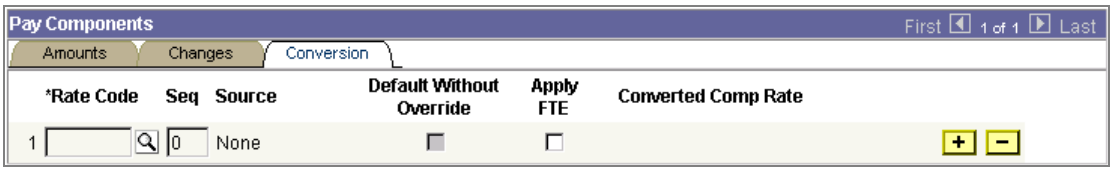
This page displays the change in an employee's salary.

Manually Updated The system selects this if you have manually updated the pay components.

Change Amount The overall change amount to this pay component rate.

Change Points The overall change amount (in points) to this pay component, if applicable.

Change Percent The overall percentage change to this pay component, if applicable.



Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.

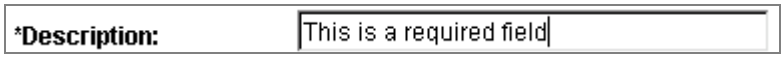
Default Without Override Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.

Apply FTE Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.

Converted Comp Rate Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.



Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font` Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
See Also	PeopleBooks provide cross-references under the heading "See Also." Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example: ***See Also*** *About These HRMS PeopleBooks,* **PeopleSoft 8.3 HRMS PeopleBooks Preface**

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	*System Name*	*Navigation*	*Usage*
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

About the PeopleSoft 8.3 Human Resources PeopleBook: Recruit Workforce

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Recruit Workforce.

This chapter complements and extends the About the HRMS PeopleBooks section of HRMS documentation by providing specific information on how to use the documentation for Human Resources. Much of the general information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks"

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions for Human Resources.

Field	*Definition*
Benefit Plan	A specific benefit offering within a plan type.
Benefit Plan Type	Also known as Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.
Benefit Program	A collection of benefit plans your company offers to a group of employees.

Field	*Definition*
Deduction	Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
Deduction Code	The code assigned to a benefit deduction.
FSA Maximum Annual Pledge	This is the total maximum an employee can pledge to contribution to a health or dependent care flexible spending accounts during a benefit plan year.
FSA Minimum Check Amount	This is the minimum amount for which a check will be printed.
Plan Type	Also known as Benefit Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Understanding the Documentation

Documentation for PeopleSoft Human Resources is made up of 25 business processes, each with their own book:

- Administer Company Cars
- Administer Festive Advance
- Administer Salaries for the Netherlands
- Administer Salary Packaging
- Administer Training
- Administer Variable Compensation
- Administer Workforce
- Base Benefits
- Manage Commitment Accounting
- Manage Competencies
- Manage French Public Sector
- Manage Netherlands Salary Administration
- Manage Performance
- Manage Positions

- Manage Professional Compliance
- Meet Regulatory Requirements
- Monitor Absence
- Monitor Health & Safety
- Plan Careers and Successions
- Plan Salaries
- Recruit Workforce
- Report Total Compensation
- Track Faculty Events
- Track Flexible Service
- Track Global Assignments

Human Resources Reports

The documentation for the Human Resources reports is in the reports chapter in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*. There you will find information about each report, listed by module.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports"

CHAPTER 2

Setting Up Recruit Workforce

This chapter explains how to:

- Define recruitment parameters.
- Set up status codes and associated rules for your recruitment activities.
- Set up recruitment templates.

Configuring Your Recruitment Applications

To configure your recruitment applications:

1. Define system parameters for your applications.
2. (Optional) Configure the managers' and recruiters' homepage if you have PeopleSoft eRecruit Manager Desktop installed.
3. (Optional) Configure your eRecruit homepages if you have PeopleSoft eRecruit installed.

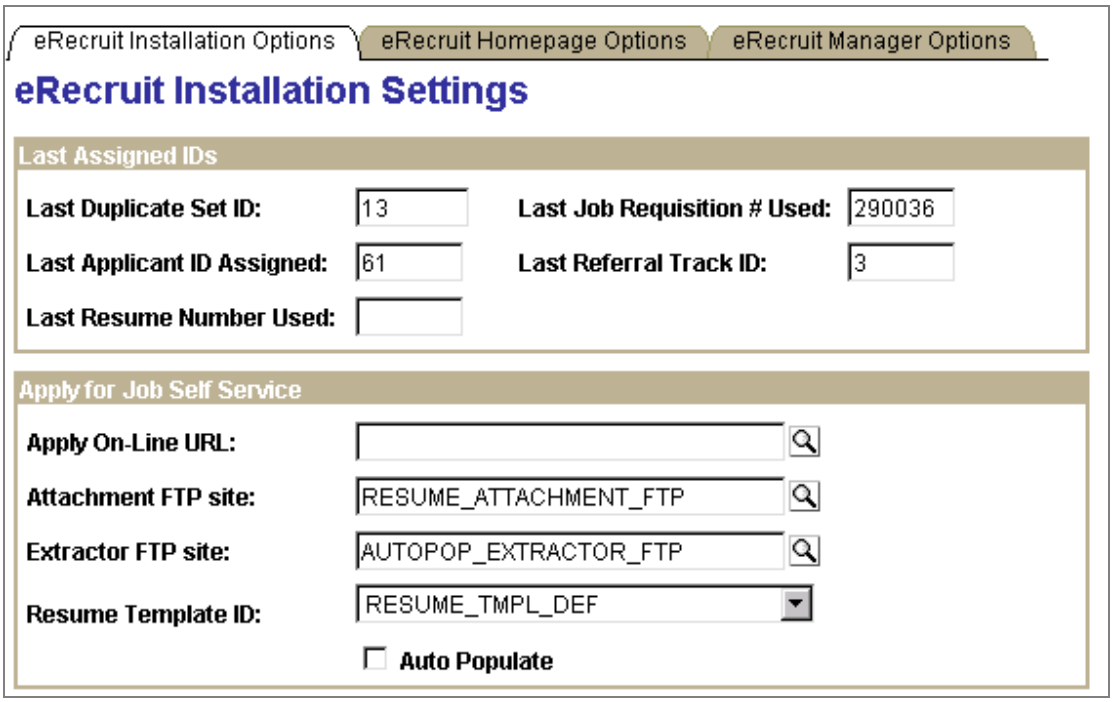
Pages Used to Configure Recruitment Applications

Page Name	*Object Name*	*Navigation*	*Usage*
eRecruit Installation Options	ER_INSTALLATION	Develop Workforce, Recruit Workforce (GBL), Setup, eRecruit Installation, eRecruit Installation Options Develop Workforce, Recruit Workforce (GBL), Setup2, eRecruit Installation, eRecruit Installation Options	Define parameters for your recruitment applications.

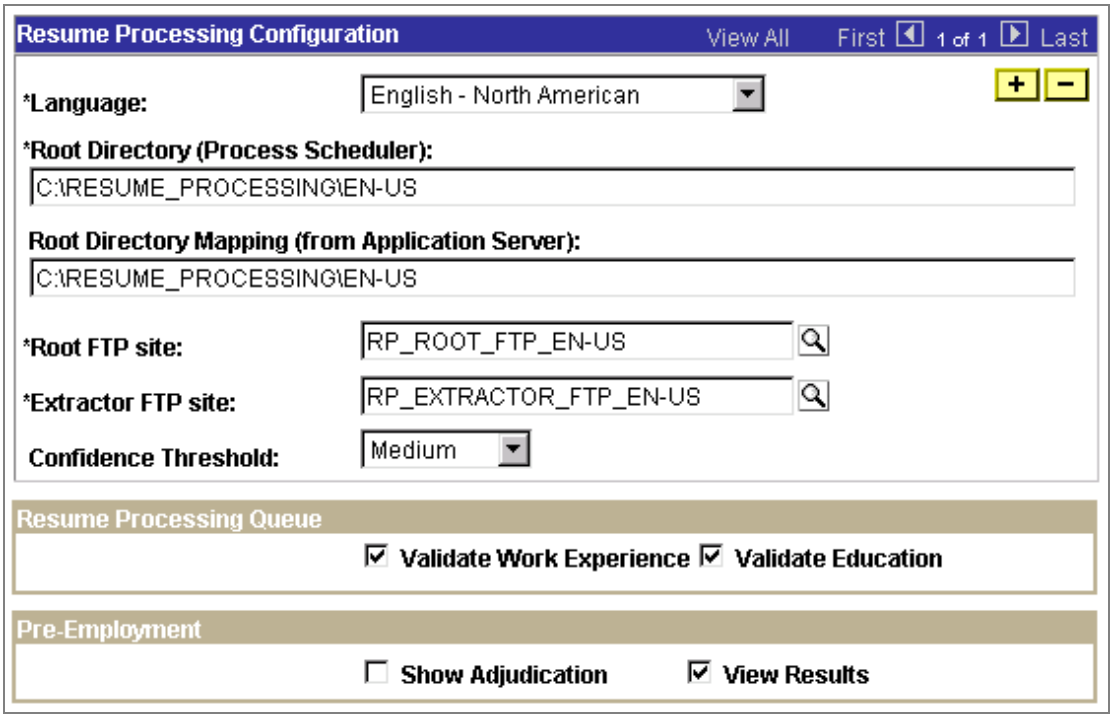
Page Name	*Object Name*	*Navigation*	*Usage*
eRecruit Manager Options	ER_MGR_HMPAGE_OPS	Develop Workforce, Recruit Workforce (GBL), Setup, eRecruit Installation, eRecruit Manager Options Develop Workforce, Recruit Workforce (GBL), Setup2, eRecruit Installation, eRecruit Manager Options	Select the options that appear when a hiring manager or recruiter accesses the eRecruit Manager Desktop homepage.
eRecruit Homepage Options	ER_HM_PGE_OPTIONS	Develop Workforce, Recruit Workforce (GBL), Setup, eRecruit Installation, eRecruit Homepage Options Develop Workforce, Recruit Workforce (GBL), Setup2, eRecruit Installation, eRecruit Homepage Options	Select the options that appear when employees or external applicants access the eRecruit homepages.

Defining System Parameters

Access the eRecruit Installation Options page.



eRecruit Installation Options page (1 of 2)



eRecruit Installation Options page (2 of 2)

Last Assigned IDs

Use these fields to specify the number that the system uses to start assigning IDs for various recruitment records. The system increases the number by one when it assigns a new number and updates this page with the new number.

Last Duplicate Set ID — Duplicate Applicant Search creates duplicate set IDs to group potential duplicate applicant records.

Last Resume Number Used — Use this field to specify the number that the system should use to start assigning resumes that are processed through PeopleSoft Resume Processing.

Last Job Requisition # Used — Specifies the number that the system uses to start assigning Job Requisition numbers.

Last Applicant ID Used — Specifies the number that the system uses to start assigning applicant IDs. If you enter 999999999 in this field, the applicant ID is manually assigned by the user.

Note. PeopleSoft Resume Processing automatically assigns applicant IDs based on the value in Last Applicant ID Assigned. If you're using Resume Processing but also add applicants manually, we recommend that you let the system assign the applicant ID. This avoids maintaining two different sets of applicant IDs.

Last Referral Track ID — Specifies the number that the system uses to start assigning employee referrals.

Apply for Job Self Service

Apply On-Line URL — Select the URL identifier you have defined that points to the page on your organization's web site where applicants can access the Apply for Job self-service transaction.

The system includes this URL in the email sent to external applicants who apply online to enable them to review or update their resume.

You also need to complete this field if you have integrated your system with RecruitUSA. The URL is sent to RecruitUSA for inclusion in your posting to online job boards. External applicants viewing the job board use this URL to apply online for the position.

Attachment FTP Site — Select the URL of the FTP address that points to the directory containing applicant resumes. When external applicants attach their resumes as part of the Apply for Job self-service transaction, the files are stored in the location you define here. The URL identifier supplied by PeopleSoft is ***RESUME_ATTACHMENT_FTP.***

Setting up the attachment feature is explained in the PeopleSoft eRecruit PeopleBook.

Extractor FTP Site Complete this field if you selected the **Auto Populate** check box. Select the URL of the FTP address that points to the Resume Extractor directory that you want to use for the auto populate. The default is ***RP_EXTRACTOR_FTP.*** However, if you have a separate installation of Resume Extractor for Apply for Job, select ***AUTOPOP_EXTRACTOR_FTP.***

This is explained in more detail in the PeopleSoft Resume Processing PeopleBook.

Resume Template ID Select the default resume template for the Apply for Job self-service transaction, which is part of PeopleSoft eRecruit. The system uses the default template if applicants don't apply for a specific job opening. The template defines the pages to include in the transaction and the ordering of those pages.

Auto Populate Select to enable automatic population of the Apply for Job self-service transaction. . When applicants attach their resume the system automatically extracts applicant data and completes fields in the Apply for Job pages.

You can only use this feature if you have PeopleSoft Resume Processing installed. You must also complete the **Attachment FTP Site** and the **Extractor FTP Site** fields for automatic population to work.

Resume Processing Configuration

Complete this group box if you have installed PeopleSoft Resume Processing. PeopleSoft Resume Processing can handle resumes in multiple languages. Set up the following fields for each language.

Language Select the resume language.

Root Directory Enter the directory path name for the resume processing root directory for the selected **Language**.

Note. The Resume Processing directories must be on the same machine as the process scheduler.

Root Directory Mapping (from Application Server) Enter the path name for the resume processing root directory, relative to the Application Server. This field is required if your process scheduler and application server are on separate machines.

The system uses this field to copy log files to the resume processing directories on the process scheduler machine.

Root FTP Site Select the URL of the FTP address that points to the resume processing root directory for the selected language. The URL identifiers supplied by PeopleSoft are named ***RP_ROOT_FTP_lang,*** where *lang* is a language code.

Extractor FTP Site Select the URL of the FTP address that points to the Resume Extractor input-output directory for the selected language. The URL identifiers supplied by PeopleSoft are named ***RP_EXTRACTOR_FTP_lang.***

Confidence Threshold Select the threshold that determines if applicants are automatically added to your database. The options are ***Very High, High, Medium,*** and ***Low***.

When Resume Extractor processes a resume, it assigns a confidence level that indicates the expected accuracy of the extracted information. The system enters an applicant directly into the applicant data tables if the assigned confidence level is equal to or greater than the confidence threshold that you select in this field.

If the confidence level is less than this threshold, the system adds the applicant to the resume queue.

For example, if you select ***High,*** resumes with a confidence level of ***High*** or ***Very High*** are automatically added to the database. Resumes with a confidence level ***Medium, Low,*** or less than low, are added to the resume queue.

Validate Work Experience Select if you want to automatically display the applicants' work history on the Resume Details page. If you clear the check box, the work experience section is collapsed initially and users must expand the section to review an applicant's work history.

Validate Education Select if you want applicants' education details to automatically display on the Resume Details page. If you clear the check box, the education section is collapsed initially and users must expand the section to review education details.

Pre-Employment

Show Adjudication If you have integrated your system with HireRight, select this check box to make the Meets Standards check box visible to managers, recruiters, and recruiting administrators.

View Results If you have integrated your system with HireRight, select this check box to make the View Results button on the Pre-Employment Requests page visible to managers, recruiters, and recruiting administrators.

The View Results button takes the user to a detailed page of the pre-employment inquiry at HireRight's site.

See Also

"Managing Applicants," Merging Duplicate Applicant Records

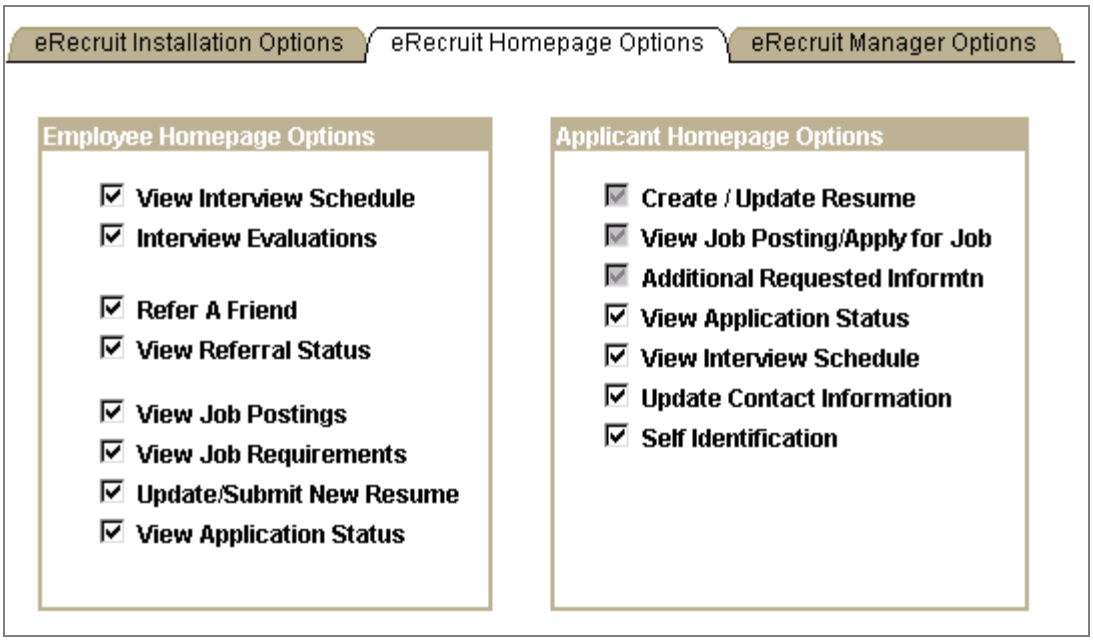
PeopleSoft eRecruit PeopleBook, "Internal and External Applicant Transactions," Setting Up Apply for Job and "Applying for Jobs," Entering Self Identification Information

PeopleSoft Resume Processing PeopleBook, "Setting Up Resume Processing"

PeopleSoft eRecruit Manager Desktop PeopleBook, "Administering Job Requisitions," Posting Job Openings to Online Job Boards and "Making Applicant Pre-Employment Checks"

Configuring the eRecruit Homepages

Access the eRecruit Homepage Options page.



eRecruit Homepage Options page

PeopleSoft eRecruit provides two homepages for employees and external applicants to access eRecruit transactions. Before you give employees or applicants access to the homepage, select the options that you want to make available to them.

Employee Homepage Options

Select the check box for each self-service transaction that you want to include on the eRecruit Employee Home page.

The employee homepage provides links for employees to view job openings and apply for jobs. Employees who are also responsible for interviewing can view their interview schedule and enter interview results.

If you have set up an employee referral program (ERP), employees can use eRecruit to submit referrals and view the status of their referrals.

Applicant Homepage Options

Select the check box for each self-service transaction that you want to include on the eRecruit Applicant Home page. The Create /Update Resume, View Job Postings, Apply for Job, and Additional Requested Information are required transactions.

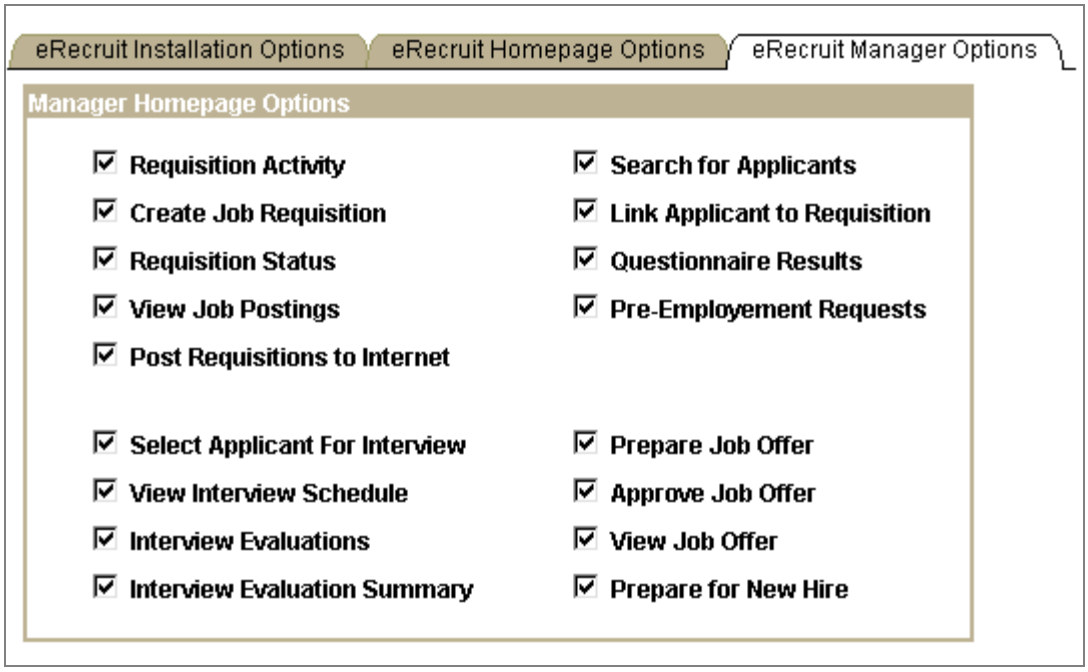
Note. The Self Identification transaction is for organizations that are required to comply with the U.S. Equal Employment Opportunities Commission (EEOC) reporting regulations. If you select this check box, an icon appears on the eRecruit Applicant Homepage for external applicants to volunteer gender and ethnicity information that is used for U.S. equal opportunities reporting. In addition, the self-identification invitation page appears at the end of the Apply for Job self-service transaction if an applicant applies for a job located in the U.S.A.

See Also

PeopleSoft eRecruit PeopleBook, "Understanding eRecruit"

Configuring the eRecruit Manager Desktop Homepage

Access the eRecruit Manager Options page.



eRecruit Manager Options page

Before you give users access to the eRecruit Manager Desktop homepage, you need to select the self-service transactions that you want to make available to managers and recruiters.

Select the check box for each self-service transaction that you want to include on the homepage. You can select from the following types of transactions:

Job Requisition Transactions

These transactions enable managers and recruiters to create, update, and distribute their own job requisitions: **Create Job Requisition, Requisition Activity, Job Requisition Status, View Job Postings,** and **Internet Job Postings.**

Applicant Transactions

These transactions enable managers to review applicants that have applied for an opening and search for suitable applicants: **Search for Applicants, Link Applicant to Requisition, Questionnaire Results,** and **Pre-employment Requests.**

Interview Transactions

These transactions are available for managing the interview stage: **Select Applicant for Interview, View Interview Schedule, Interview Evaluations,** and **Interview Evaluation Summary.**

Hire Transactions

The **Prepare Job Offer, Approve Job Offer, View Job Offer Status,** and **Prepare New Hire** transactions are available for managers and recruiters to enter job offers for approval and initiate pre-hire tasks.

Note. The Internet Job Postings and Background Checks transactions require integration with other suppliers.

See Also

PeopleSoft eRecruit Manager Desktop PeopleBook, "Understanding eRecruit Manager Desktop"

Setting Up Recruitment Templates

Recruitment templates define the templates used to create and process a job requisition. When hiring managers and recruiters create a job requisition, they select a recruitment template and this determines the pages that they complete for the requisition. Later on, when applicants apply online for the requisition, the recruitment template determines which pages to include in the Apply for Job self-service transactions.

You can associate the following types of templates with a recruitment template:

- Requisition template

  This template is used for the Create Job Requisition self-service transaction. It defines the pages included in the transaction and the order in which they appear.

- Resume template

This template is used for the Apply for Job self-service transaction. It defines the pages included in the transaction and the order in which they appear.

- Employee Referral Program (ERP) template

ERP templates define which ERP applies to the job requisition.

- Interview evaluation template

An interview evaluation template defines which form interviewers use to evaluate applicants for the requisition.

Note. Make sure that the pages in resume templates are consistent with the associated requisition template. Otherwise, there could be a mismatch between job requirements and the information applicants supply through Apply for Job.

To create recruitment templates for your system:

1. Create requisition templates using the Requisition Options page.
2. Create resume templates using the Resume Options page.
3. Set up your employee referral programs.
4. Create Interview Evaluation forms.
5. Create the recruitment template.

Pages Used to Set Up Recruitment Templates

Page Name	*Object Name*	*Navigation*	*Usage*
Interview Evaluation Definition	ER_INTVW_EVAL_DEFN	Develop Workforce, Recruit Workforce (GBL), Setup, Define Interview Evaluations Develop Workforce, Recruit Workforce (USF), Setup, Define Interview Evaluations	Create evaluation forms that your interviewers complete to evaluate applicants.
Recommendation Reasons	ER_INT_EVL_RSN_SEC	Click the Reason link on the Interview Evaluation Definition page.	Select the reasons you want interviewers to use on the interview evaluation form.

Page Name	Object Name	Navigation	Usage
Recruitment Template Settings	ER_RCRT_TMPL	Develop Workforce, Recruit Workforce (GBL), Setup, Recruitment Template Develop Workforce, Recruit Workforce (USF), Setup2, Recruitment Template	Create a recruitment template that defines the templates used for a job requisition.

See Also

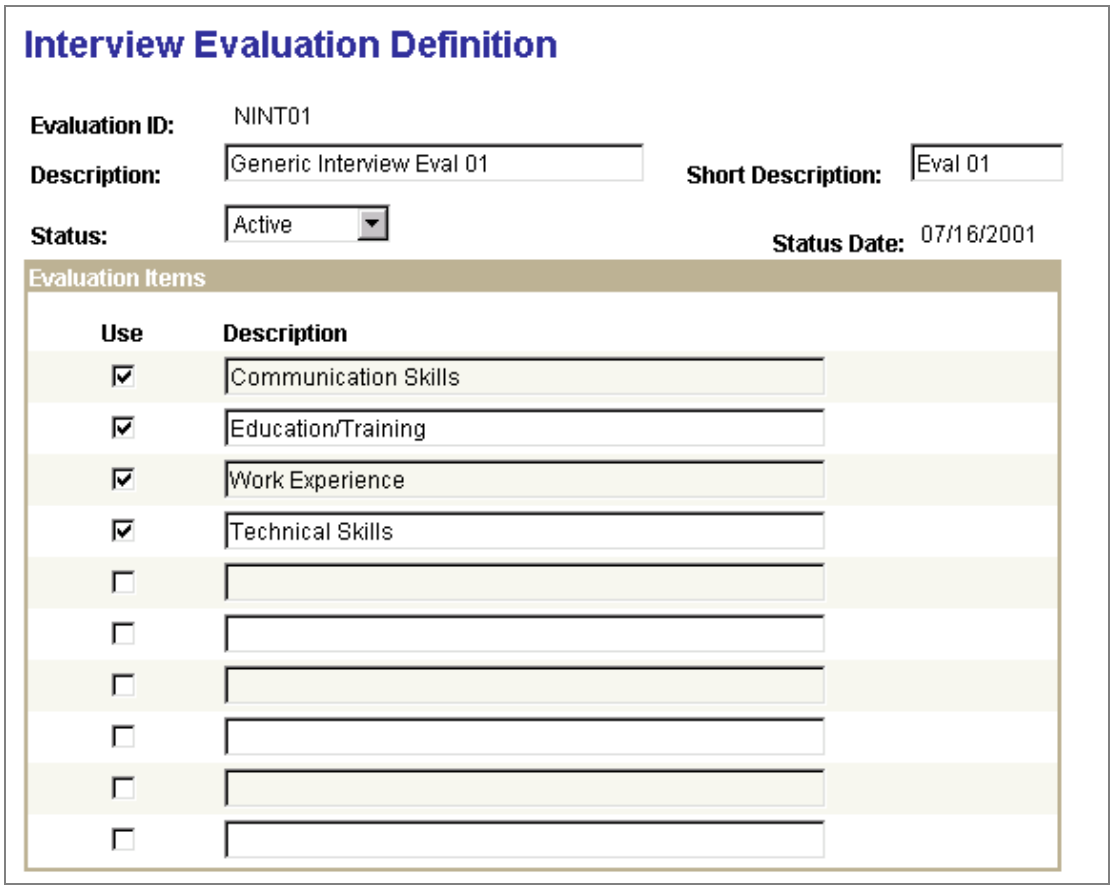
Peoplesoft eRecruit PeopleBook, "Internal and External Applicant Transactions," Setting Up Apply for Job

Peoplesoft eRecruit Manager Desktop PeopleBook, "Administering Job Requisitions," Setting Up Create Job Requisition

"Administering Employee Referral Programs "

Creating Interview Evaluation Forms

Access the Interview Evaluation Definition page.



Interview Evaluation Definition page (1 of 2)



Interview Evaluation Definition page (2 of 2)

Evaluation ID The code for the evaluation form. Typically the areas you want to evaluate vary according to the job applied for, so you can create a different form for each job type.

Use Select if you want to include the item, recommendation, reason, or rating value in the template.

Evaluation Items

Define the areas in which interviewers evaluate applicants. For each evaluation item you include on the form, interviewers rate the applicant using the scale you define in **Rating Scale.**

Recommendation

Description The system automatically lists the status values defined for the interview recruitment area. If you have changed the default statuses supplied by PeopleSoft, the system displays your own statuses here. Select the statuses you want to include in the template.

Reasons Click this link to access the Recommendation Reasons page where you can view the reasons associated with the status values in Description. Select the reasons you want to include on the evaluation form. Interviewers select a reason that explains their recommendation.

Reason Required	Select if you want interviewers to select a reason when they select the status value on the evaluation form.

Rating Scale

Description	Define the scale that interviewers use to rate applicants in the areas specified in Evaluation Items. The system creates a radio button on the interview evaluation form for each rating you enter here.
Rating	Enter the number of points associated with the rating you enter in **Description.** The system uses this value to determine the overall score of applicants.

Note. Once an interviewer has completed and saved an evaluation using an interview evaluation form, you can't make changes to the Rating Scale fields on this page.

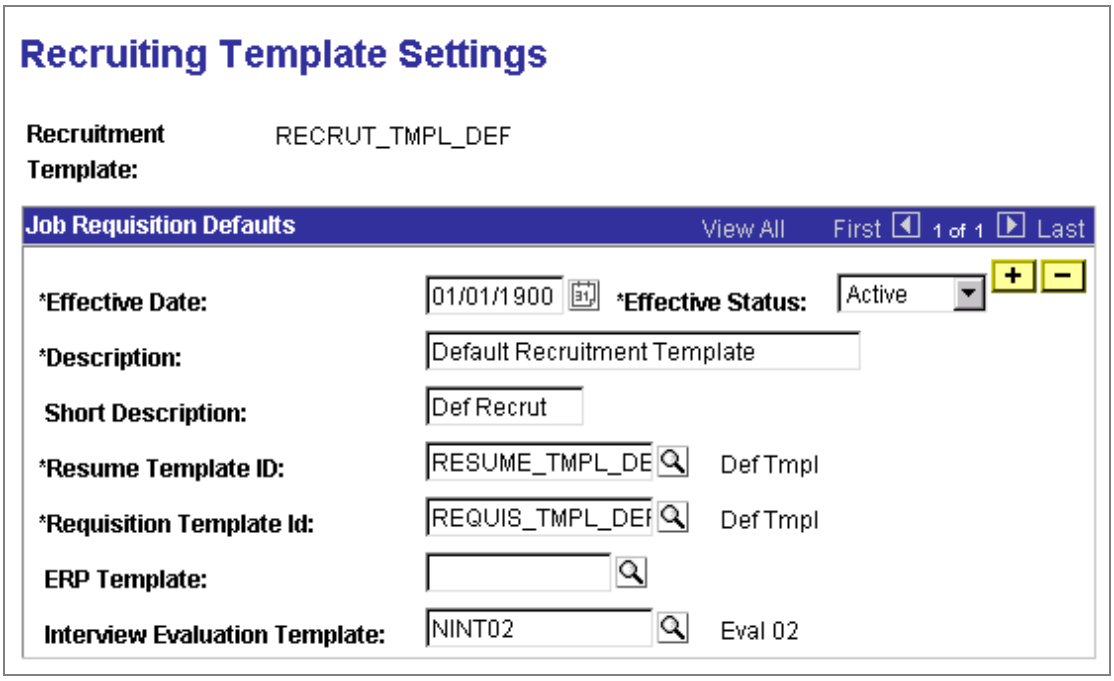
See Also

Setting Up Recruitment Status Codes

PeopleSoft eRecruit Manager Desktop PeopleBook, "Organizing Interviews"

Creating Recruitment Templates

Access the Recruiting Template Settings page.



Recruitment Template Settings page

Recruitment Template The name of the recruitment template.

Resume Template ID Select the Resume Template you created using the Resume Options page.

Note. The REFERRAL template is used for the Refer a Friend transaction. Do not link the REFERRAL template to a recruitment template.

Requisition Template ID Select the requisition template you created using the Requisition Options page.

ERP Template Select the employee referral program you previously defined.

Interview Evaluation Template Select the interview evaluation form you want to use for this template.

Note. Resume Templates and Requisition Templates are required only if you are using PeopleSoft eRecruit and eRecruit Manager Desktop.

See Also

PeopleSoft eRecruit PeopleBook, "Internal and External Applicant Transactions," Setting Up Apply for Job

PeopleSoft eRecruit Manager Desktop PeopleBook, "Administering Job Requisitions," Setting Up Create Job Requisition

"Administering Employee Referral Programs "

Setting Up Recruitment Status Codes

Recruit Workforce has six types of status codes to track different aspects of your recruitment activities. The following table explains how these status codes are used and lists the tables where the statuses are recorded:

Recruitment Area	*Purpose*	*Table*
Job Requisition	To track the status of the requisition in the recruitment process. PeopleSoft supplies job requisition statuses that mirror Position Applied for statuses. For example, a status of *Interview* means that there is at least one applicant at the Interview stage for that job requisition.	JOB_REQUISITION
Applicant	To indicate whether the applicant is actively seeking a job. PeopleSoft supplies applicant statuses of *Active, Inactive,* and *Hired.* The system considers *Inactive* and *Hired* applicants as unavailable for recruitment.	APPLICANT
Position Applied For	To indicate how far an applicant has progressed in the recruitment process for a particular job requisition. This is shown as Disposition status on the recruitment pages.	POSN_APPLIEDFOR
Route	To track the progress of an application within the routing stage.	APPLICATN_ROUTE
Interview	To track progress within the interview stage and interviewers' recommendations.	ER_INTERVIEW
Offer	To track progress within the offer stage.	OFFER

Warning! Setting up status codes is optional. PeopleSoft supplies a set of codes and associated rules for status changes. We strongly recommend you use the delivered statuses and rules.

To set up recruitment status codes and rules:

1. Define status values and associated reasons on the Status/Reason Table page.
2. Define the rules that govern how the statuses are processed using the Status Recruitment Area Rules page.
3. (Optional). Define the status codes that are assigned following requisition screening or by the basic eligibility process.

Setting Up Status Rules

The Status Recruitment Area Rules page lists the status codes defined for a selected recruitment area. For each status code, you can define:

- Successors to a given status
- The workflow associated with a status (optional)
- The effect of applying a given status on the status of other records

Successors

Use the Status Successors page to define the progression from one status to another. Here is an example of how the Position Applied for (Disposition) status for a successful application typically changes:

Posted

Screened – Preliminary

Screened – Final

Routing

Interview

Offer

Offer Accepted

Hired

Note. The status values shown are for example only. PeopleSoft deliver different status values for U.S. Federal government installations and additional values to meet local country requirements.

The system uses the successor information to determine if a status change is valid. When a user updates the status of an applicant, application, or job requisition, the system checks whether the new status is a valid successor and issues warning or error messages if it isn't in the successor list.

For extra flexibility you may want to allow applicants to skip certain phases of the recruitment process, for example to go from *Routing* to *Offer*. Therefore, the Routing status is set up with successors of *Interview, Offer, Offer Accepted,* and *Hired.*

Workflow

You can set up workflow that is triggered by a status change. Define the workflow you want to execute and then link this to a status code on the Status Workflow page.

See Also

Defining Status Workflow

PeopleTools PeopleBook: PeopleSoft Workflow, "Understanding Workflow"

Effect of Status Change

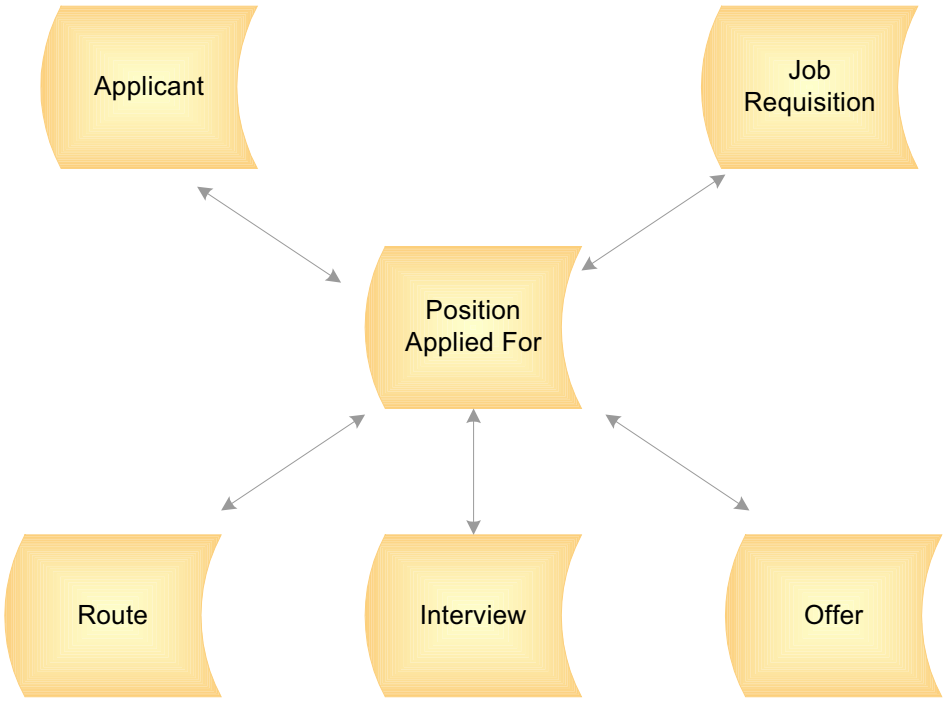
When the status of an applicant, job requisition, or application changes this may affect the status of other records.

For example, when a recruiter decides to hire an applicant, this affects the position applied for status of multiple applicants, and affects the job requisition status. The following table explains the rules that PeopleSoft supplies for the Hire status.

Recruitment Area	Records Affected	Impact
Position Applied For	Hired applicant	Set status to *Hired* for the selected job requisition.
Position Applied For	Hired applicant's other applications	If the hired applicant is linked to other job requisitions, set the Position Applied for status for those applications to *Reject* and reason code to *Selected for Another Position.*
Position Applied For	Other applications for the requisition	If all the openings for the requisition are filled, set the Position Applied for status to *Reject* and reason code to *Another Applicant was Hired.*
Job Requisition	Job Requisition	If all the openings are filled, set the Job Requisition Status to *Filled/Closed.*

Note. This table shows the PeopleSoft-delivered rules. However, you can adjust the status codes and rules to suit your organization.

Some status codes don't affect other statuses and there are restrictions on the changes allowed. Changing an applicant's status to *Inactive,* for example, doesn't have an impact on the status of a job requisition. However, it does have an impact on the status of the applicant's open applications, which could in turn affect the job requisition status. The following illustrates how status values in each recruitment area impact statuses in other recruitment areas.



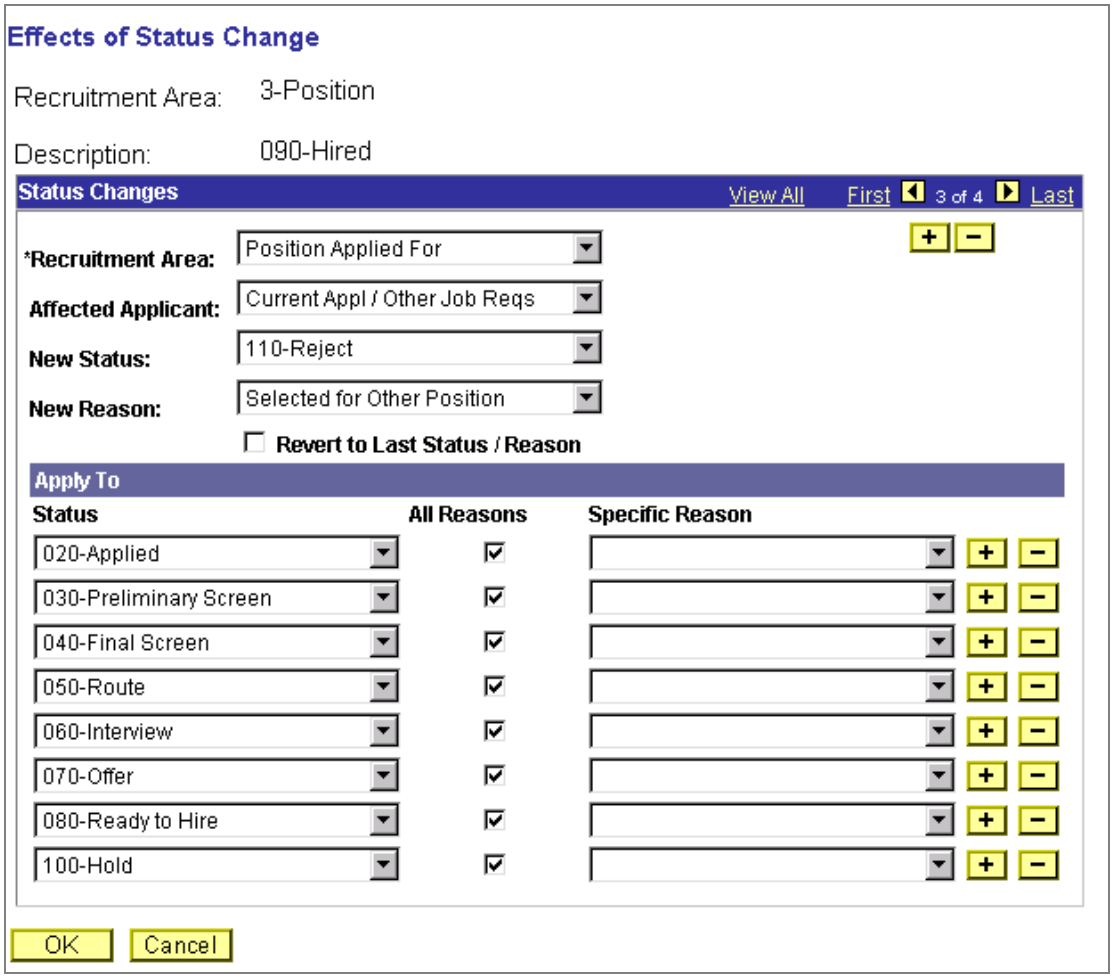
Impact of Status Changes Between Recruitment Areas

You define the rules for changing status values on the Effects of Status Change page.

For each rule you define:

- Recruitment area affected
- The records within the recruitment area that are affected by the status change.
- New status and reason code that the system applies to those affected records.

Here is an example of the Effects of Status Change page for the Position Applied For status of Hired.



Effects of Status Change Example page

In this example, when an applicant's application is set to *090-Hired,* the following rule is applied:

- The recruitment area affected is Position Applied For.
- Within the Position Applied For table, the records affected are defined by the Affected Applicant field and the Apply To group box. In this example, the records affected are the Hired applicant's other applications that have one of the statuses listed in the Apply To group box.
- The new status that the system applies is *110-Reject* and the reason code is *080 Selected for Other Position.*

Note. This example shows only one of the PeopleSoft-delivered rules for the Hired status. The Hired status has other rules that you access by clicking the navigation buttons.

Understanding the Affected Applicant Field

To help you understand how the Affected Applicant field defines which records are affected in the Position Applied For table, consider the example of a Position Applied For table with the following five rows:

Row	*Applicant*	*Job Requisition*	*Position Applied For Status*
1	Smith, Pete	HR Administrator	Route
2	Smith, Pete	Administrator	Applied
3	Smith, Pete	Marketing Assistant	Offer
4	Wilson, Charles	Marketing Assistant	Hold
5	Parkes, Linda	Marketing Assistant	Hold

Suppose Pete Smith accepts the Offer for the position of Marketing Assistant. When the recruiting administrator hires Pete Smith, the status of row 3 is set to 090-Hired.

Now if you compare this with the example Effects of Status Change page shown previously:

- Current Applicant is Smith, Pete
- Current Job Requisition is Marketing Assistant

The Affected Applicant field defines the rows that are affected by the rule as explained in the table below:

Field Value	*Rows Affected*
Current Appl / Other Job Reqs (Current Applicant/Other Job Requisitions)	1 and 2. This represents the Hired applicant's other applications.
Other Appl /Current Req (Other applicants/Current Job requisition)	4 and 5. This represents the other applications for the requisition that the Hired status applies to. This rule is triggered only if there are no more openings for the job requisition.

Cascading Rules

If a status change results in a new status which also has rules associated with it, the system automatically applies the rules for the new status after processing the first set of rules. Rules that trigger other rules are known as cascading rules.

Using the Hired status as an example, if you define rules for the Reject status, the system automatically processes the Reject rules on completion of the Hired rules. Similarly, if the Reject rules triggered other rules, the system processes those rules in turn.

The system processes cascading rules until there are no rules associated with the new statuses.

Pages Used to Set Up Status Codes and Rules

Page Name	Object Name	Navigation	Usage
Status/Reasons Table	ER_STATUS_TBL	Develop Workforce, Recruit Workforce (GBL), Setup, Status/Reasons Table Develop Workforce, Recruit Workforce (USF), Setup2, Status/Reasons Table	Set up status values for your recruitment activities. You can also associate reason codes with a status.
Status Recruitment Area Rules	ER_STATUS_AREA_TBL	Develop Workforce, Recruit Workforce (GBL), Setup, Status Recruitment Area Rules Develop Workforce, Recruit Workforce (USF), Setup2, Status Recruitment Area Rules	Define the rules for status values you've previously set up on the Status/Reason Table page.
Status Successors	ER_STATUS_SUCC_TBL	Click the Successors link on the Status Recruitment Area Rules page.	Define the status values that succeed a given status. The system uses the information on this page to determine if a status change is valid. If a user updates the status of an application or job requisition and the new status isn't listed as a successor, the system issues a warning or error message.
Effects of Status Change	ER_STATUS_EFF_TBL	Click the Effects of Status Change link on the Status Recruitment Area Rules page.	Define how applying a given status impacts the status of other records. When a status changes this can affect the status of records in the same recruitment area or in other recruitment areas. Leave this page blank if a status has no impact on other statuses.

Page Name	Object Name	Navigation	Usage
Status Workflow	ER_STATUS_WF_TBL	Click Workflow link on the Status Recruitment Area Rules page.	Define the business process, activity, and event that the system executes for a given status.
Status Screening Process Table	ER_SCREEN_STS_TBL	Develop Workforce, Recruit Workforce (GBL), Setup, Status Screening Process Table Develop Workforce, Recruit Workforce (USF), Setup2, Status Screening Process Table	Define the disposition status change that occurs following requisition screening. If you're a user of the US Federal Government application, use this page to define the statuses applied by the basic eligibility process. When you run requisition screening or the basic eligibility process, there are a number of possible results, depending on how well the applicant matched the requirements. For each result, define the status and an optional reason code that the system assigns to the application.

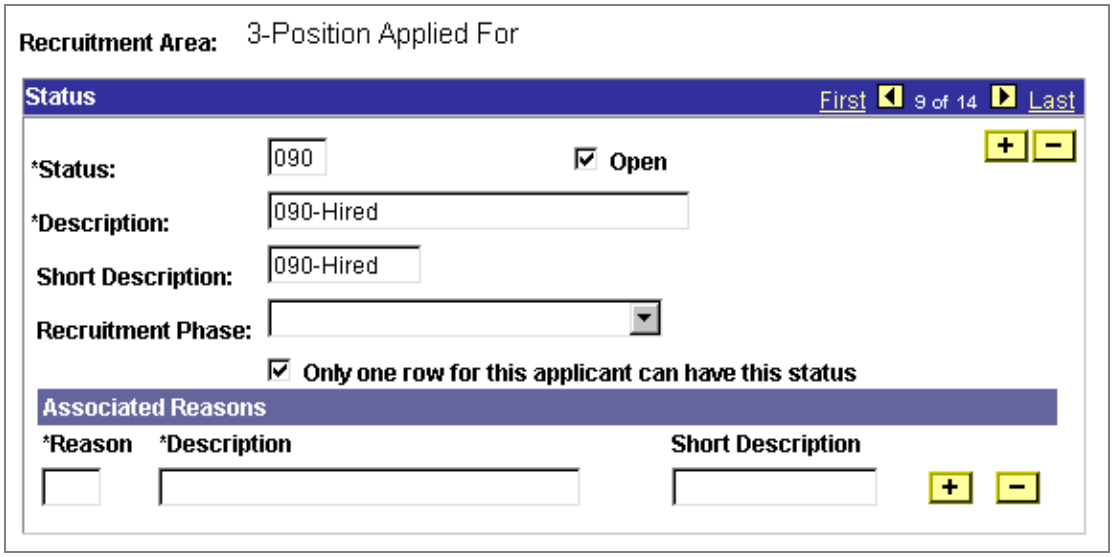
See Also

"Processing Applicants," Screening Applicants

"(USF) Processing Applicant Qualifications" Running Priority Placement and Basic Eligibility Processes

Setting Up Statuses and Reasons

Access the Status/Reasons Table page.



Status/Reasons Table page

Recruitment Area Select the recruitment area to which the status applies.

Status Enter a three character status code.

Open Select this check box if the status indicates an applicant, job requisition, or application that is active or in progress. For example, the job requisition status *Posted* is an open status because it indicates that you have started recruiting, but not completed the recruitment process. Similarly, the applicant status Active is an open status whereas Hired and Inactive are not open statuses.

It is vital that this check box is set up correctly because it affects processing throughout the system. For example, the system only allows you to link applicants to job requisitions that have an open status.

Recruitment Phase The system displays this field if the **Recruitment Area** is ***Position Applied For.*** Use it to map your new position applied for statuses to the default recruitment phase. For example, if you set up a code to replace the Interview status that PeopleSoft provides, select ***4-Interview*** in this field.

The system requires this information to determine which stage an application has reached in the recruitment process.

Only one row for this applicant can have this status Select this check box if an applicant can't have multiple rows in the Position Applied For, Route, Interview, or Offer table with this status.

For example, if you don't want applicants to receive more than one job offer, select this check box for the *Offer* status in Position Applied For. The system issues a

warning if a user attempts to apply a status that already exists for that applicant.

Associated Reasons

Reason Enter the reason codes and descriptions for the status code.

Defining Status Rules

Access the Status Recruitment Area Rules page.

Recruitment Area: 3-Position Applied For

Define Recruitment Area Rules

Description	Default	Complete	Successors	Effects of Status Change	Workflow
020-Applied	☑	☐	Successors	Effects of Status Change	Workflow
030-Preliminary Screen	☐	☐	Successors	Effects of Status Change	Workflow
040-Final Screen	☐	☐	Successors	Effects of Status Change	Workflow
050-Route	☐	☐	Successors	Effects of Status Change	Workflow
060-Interview	☐	☐	Successors	Effects of Status Change	Workflow
070-Offer	☐	☐	Successors	Effects of Status Change	Workflow
073–Request Wrks Cncl Approval	☐	☐	Successors	Effects of Status Change	Workflow
080-Ready to Hire	☐	☐	Successors	Effects of Status Change	Workflow
090-Hired	☐	☑	Successors	Effects of Status Change	Workflow
100-Hold	☐	☐	Successors	Effects of Status Change	Workflow
110-Reject	☐	☐	Successors	Effects of Status Change	Workflow
120-Withdrawn	☐	☐	Successors	Effects of Status Change	Workflow
Selected	☐	☐	Successors	Effects of Status Change	Workflow
Inactive	☐	☐	Successors	Effects of Status Change	Workflow

Status Recruitment Area Rules page

Description The system displays the status values you defined on the Status/Reason Table page for the selected **Recruitment Area.**

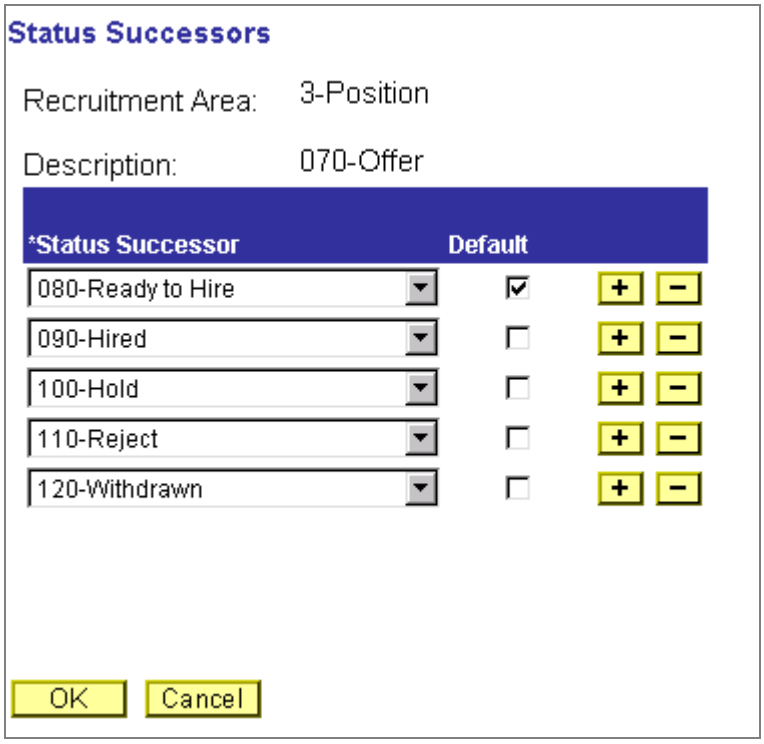
Default Select if the status is the first status used in the recruitment area. You can select one status only as the default. The system uses this check box to determine which status to apply initially.

Complete Select if the status indicates the successful completion of the recruitment process. The system uses this check box to determine when an application is ready to move to the next stage in the recruitment process. You can select one status only as the complete status.

	It is important this check box is set up correctly as it affects processing throughout the system.
Successors	Click to display the Status Successors page where you define the next statuses that can follow on from the selected status.
Effects of Status Change	Click to display the Effects of Status Change page where you define the rules that apply when an applicant, application, or job requisition, is assigned the status.
Workflow	Click to display the Status Workflow page where you define the workflow executed for the status.

Defining Status Successors

Access the Status Successors page.

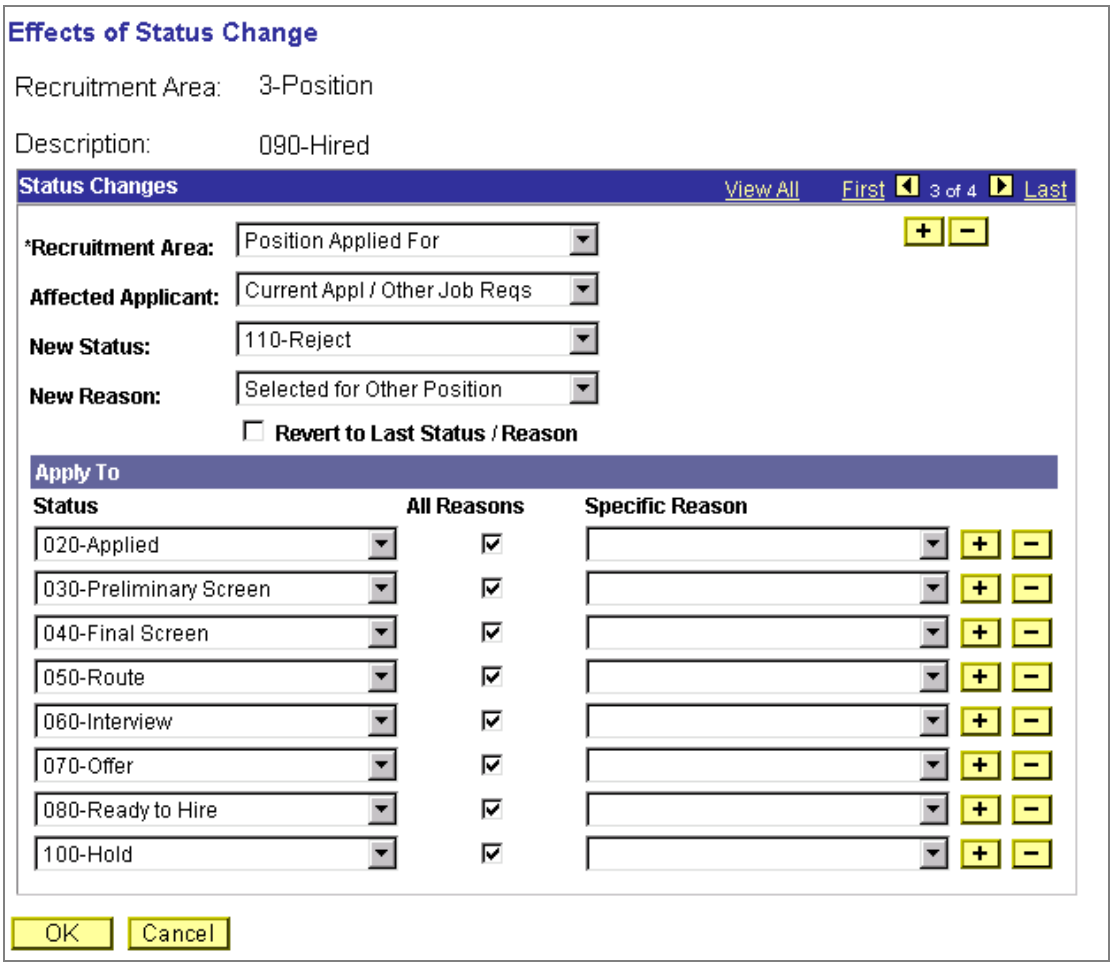


Status Successors page

Status Successor	Add the status codes that are valid successors to the status shown in **Description.**
Default	Select this check box for the status that is the most likely successor.

Defining the Effects of Status Change

Access the Effects of Status Change page.



Effects of Status Change page

Warning! Changes to this page must be made by technical personnel with an in-depth understanding of the structure of your PeopleSoft Human Resources database. If your status change rules aren't set up correctly, this can lead to incorrect updates to recruitment records.

Status Changes

Recruitment Area

Use this field to identify the table that is affected by the status shown in **Description.** If the **Description** status is in Position Applied For recruitment area, you can select other recruitment areas that are affected by the status change.

Otherwise, the system automatically selects ***Position Applied For.***

Affected Applicant	Use this field to identify which rows in the Position Applied For table are affected by the status change. Select one these options: ***Current Appl /Current Req*** (current applicant/current job requisition) if the New Status is applied to the application with the Description status. ***Current Appl / Other Job Reqs*** (current applicant/other job requisitions) if the status change affects other requisitions to which the current applicant is linked. ***Other Appl / Current Req*** (other applicants/current job requisition) if the status change affects other applicants linked to the current job requisition. The system applies this status change only if there are no more openings for the job requisition.
New Status	Select the status that is applied to the records affected.
New Reason	Select the reason that is applied to the records affected.
Revert to Last Status/Reason	Select if the status reverts to the previous status and reason code assigned. Leave the **New Status** and **New Reason** fields blank if you select this check box.

Apply To

Use this group box to define which records within the Recruitment Area selected in Status Change are changed to the New Status and New Reason.

Status	Select the statuses affected by the status change. You can choose from the status values defined for the recruitment area you selected in the Status Changes group box. If the status change should be applied to all reason codes associated with the **Status,** select the **All Reasons** check box. Otherwise, select one reason code in **Specific Reason.**

Note. If you select Job Requisition in Status Changes, and the **New Status** is also a complete status, such as Hired, the system only applies the new status if all the target openings are filled.

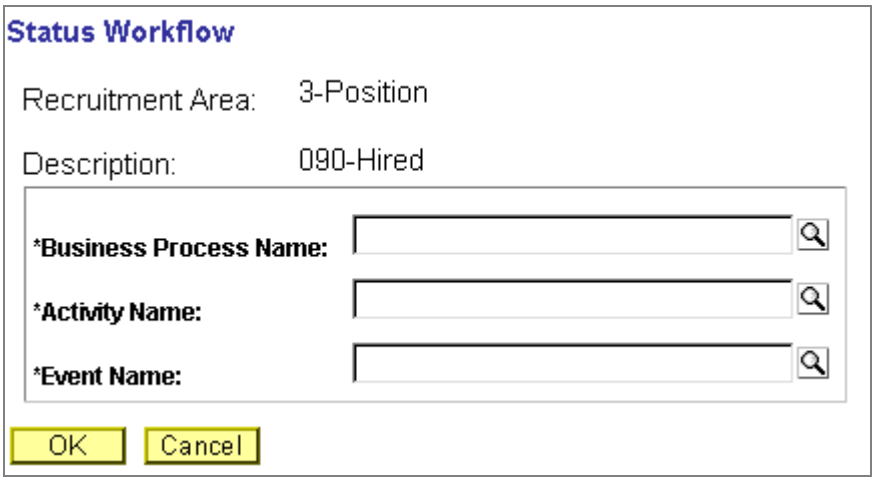
See Also

Setting Up Status Rules

Defining the Effects of Status Change

Defining Status Workflow

Access the Status Workflow page.



Status Workflow page

Business Process Name Select from the business processes you previously defined in Application Designer.

Activity Name Select the activity that runs when the status shown in **Description** is applied to a record in the table represented by **Recruitment Area.**

Event Name Select the event from those defined for the activity.

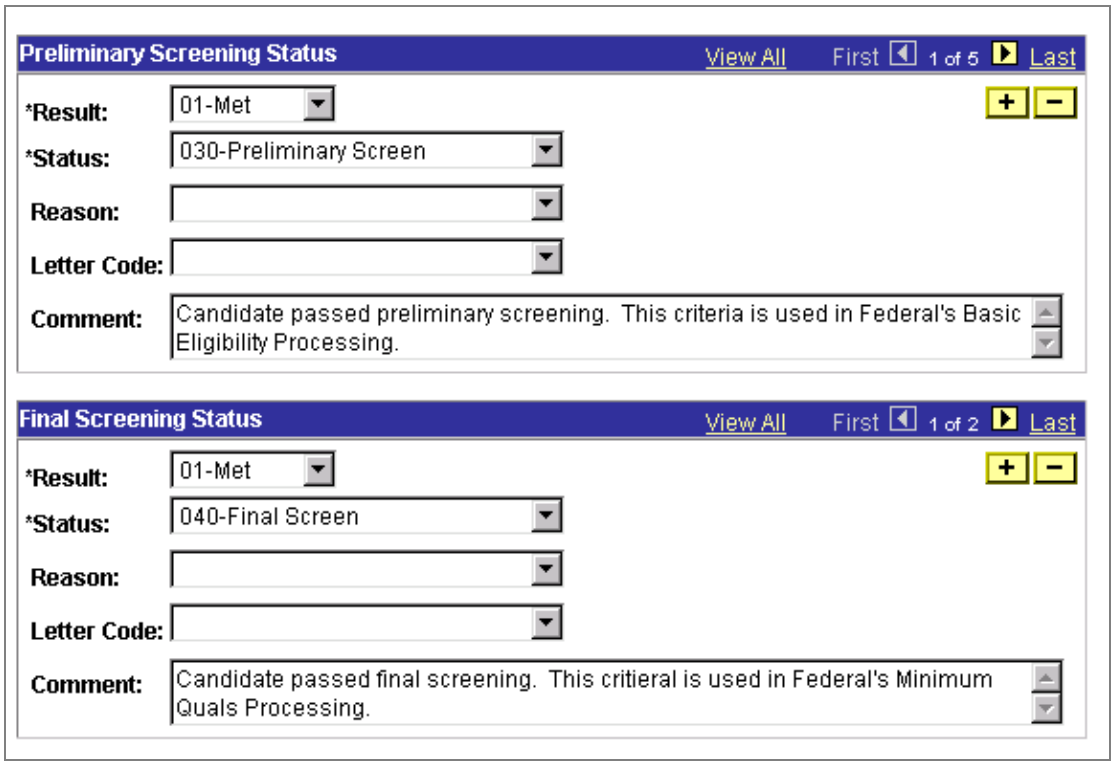
Note. Do not use this page to define workflow for the Create Job Requisition, Prepare Job Offer, and Approve Job Offer self-service transactions.

See Also

PeopleTools PeopleBook: PeopleSoft Workflow, "Understanding Workflow"

Defining Screening Process Status Changes

Access the Status Screening Process Table page.



Status Screening Process Table page

Note. Setting up status values on this page is optional. We recommend that you use the settings supplied by PeopleSoft, unless your organization requires specific status values for screening.

Result Select the outcome of requisition screening or basic eligibility process from ***01-Met*** or ***02-Not Met.***

Status Select the Position Applied for status that the system applies for the outcome you selected in **Result.**

For users of the commercial product, the system applies this status when you click the Save button on the requisition screening pages.

For U.S. Federal Government users, when the result of the basic eligibility process is ***02-Not Met***, **Status** is ***110-Reject.*** A status of 110-Reject may be a result of the following reasons, Ineligible - ***EmplCond,*** Ineligible - ***InBasicEl,*** or Ineligible - ***Min Gr/Sal.***

Reason If there is a specific reason, select the reason that the system applies.

Letter Code If you want to generate a form letter following screening or basic eligibility processing, select the letter type.

See Also

"Processing Applicants," Screening Applicants

"(USF) Processing Applicant Qualifications"

"Processing Applicants," Generating Recruitment Letters

CHAPTER 3

Administering Job Requisitions

This chapter describes the prerequisites for creating job requisitions and discusses how to:

- Set up screening questions.
- Create job requisitions.
- Generate recruitment job postings.
- Track job requisitions.

Note. Creating job postings for U.S. Federal government users is discussed in "(USF) Creating Job Requisition Postings and USA Jobs Feed" in this PeopleBook.

Prerequisites

Complete these tasks before setting up your Recruit Workforce business process:

- Set up the Manage Competencies business process.
- Set up applicant security.
- Set up your recruitment templates.

See Also

"Setting Up Recruit Workforce," Setting Up Recruitment Templates

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Setting Up the Manage Competencies Business Process

The Recruit Workforce business process draws on information that you set up in the Manage Competencies business process. In particular, to assign competencies and accomplishments to job requisitions and applicants, set up:

- Competency codes.

  Set up two tables for competencies: the Competency Type table and the Competency table. For U.S. Federal government installations, you must also set up the competency proficiency descriptions.

- Accomplishments.

  Define accomplishments in several tables, including the Major table, School table, License/Certification table, and Test table.

- Default competency profiles for job codes or job families (optional).

  If you define default competencies and accomplishments required for a job code or job family, it is easy to copy the profile to a job requisition.

Familiarize yourself with the Manage Competencies functionality in PeopleSoft Human Resources as part of setting up your Recruit Workforce business process.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

Setting Up Applicant Security

Applicant records, like employee records, contain confidential and sensitive information, so it's important to limit user access to that data. Access to applicant data is controlled by the standard department security setup for your PeopleSoft Human Resources system. For recruiters, assign access to applicant records on a permission list. Then assign the permission list to the appropriate user ID in the Permission Lists component.

The security for applicant data contains the following key layers:

Department Security

Users have access to applicant data based on the department ID associated with a job requisition, rather than the applicant's department ID. This means that hiring managers have access only to applicants who have actively applied for a job within their department. If employees in the same department as a hiring manager apply for jobs outside that department, the hiring manager cannot access their applicant data. This is the default access for all users and is controlled by the department security that you have in place.

Recruiter Access

From the Applicant Security page, you can give users additional access to applicant data, including access to all applicants who are not linked to a job requisition. Typically, you assign additional access to recruiters who need access to applicants in different companies, business units, and locations.

Menu Item Security

Using the standard PeopleTools Security Administrator, you can control which options each user can access in the Recruit Workforce menu.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security"

Setting Up Screening Questions

Many organizations use standard questionnaires as part of the screening process. You can incorporate questions into your screening criteria for requisition screening as follows:

- Define standard questions and link them to two or more possible answers. If you want to create a standard template for different job types, create a question set. If the questions are related to a particular skill or ability, you can link the question set to a competency in your Competency Table.
- When hiring managers or recruiters create a job requisition, they select the question set or individual screening questions that they want to link to the requisition. For each answer, they assign a points score.
- When applicants apply online, using the Apply For Job self-service transaction, the system presents them with questions linked to all the job requisitions being applied for. Questions that are assigned to more than one requisition are included only once in the online questionnaire. Applicants who aren't applying for a specific requisition are not presented with screening questions.
- Requisition screening calculates applicants' scores using the points that were assigned and adds these to the points for the other screening criteria. The system then ranks applicants according to their total score.

To set up screening questions:

1. Define answers on the Answer Definition page.
2. Create questions and link to the pre-defined answers using the Question Definition page.
3. (Optional). Create standard questionnaires using the Question Set Definition page.

See Also

PeopleSoft Human Resources PeopleBook: Recruit Workforce, "Processing Applicants," Screening Applicants

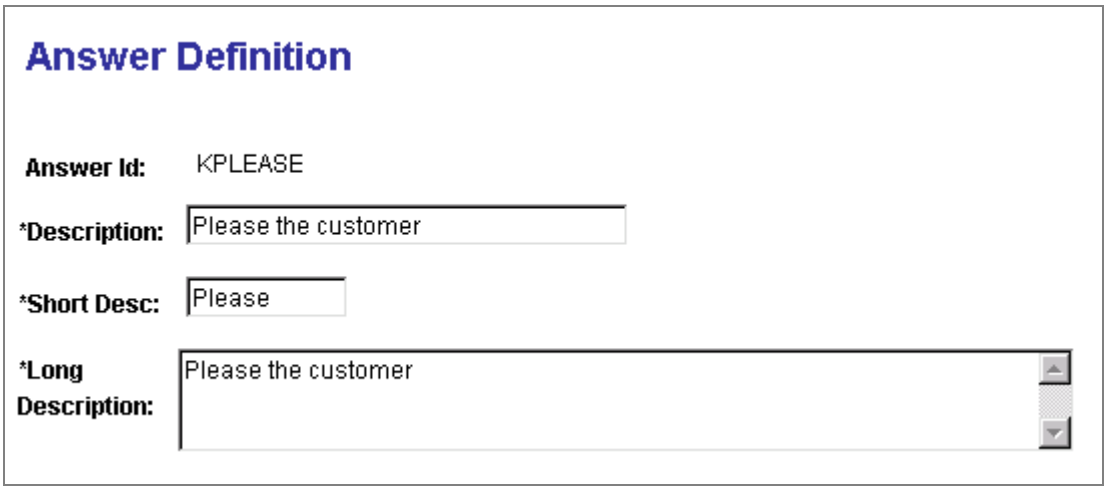
PeopleSoft eRecruit PeopleBook, "Internal and External Applicant Transactions," Applying for Jobs

Pages Used to Set Up Screening Questions

Page Name	Object Name	Navigation	Usage
Answer Definition	ER_ANSWER_DEF	Develop Workforce, Recruit Workforce (GBL), Setup, Answer Definition Develop Workforce, Recruit Workforce (USF), Setup, Answer Definition	Define standard answers to screening questions.
Question Definition	ER_QUESTION_DEF	Develop Workforce, Recruit Workforce (GBL), Setup, Question Definition Develop Workforce, Recruit Workforce (USF), Setup, Question Definition	Define standard questions for screening applicants.
Question Set Definition	ER_QSTN_SET_DEF	Develop Workforce, Recruit Workforce (GBL), Setup, Question Set Definition Develop Workforce, Recruit Workforce (USF), Setup, Question Set Definition	Create a questionnaire based on questions you've previous set up.
Question Set Answers	ER_QSTN_SET_ANS	Click the View Answers link on the Define Question Set page.	View the answers linked to questions in a question set.

Defining Answers

Access the Answer Definition page.



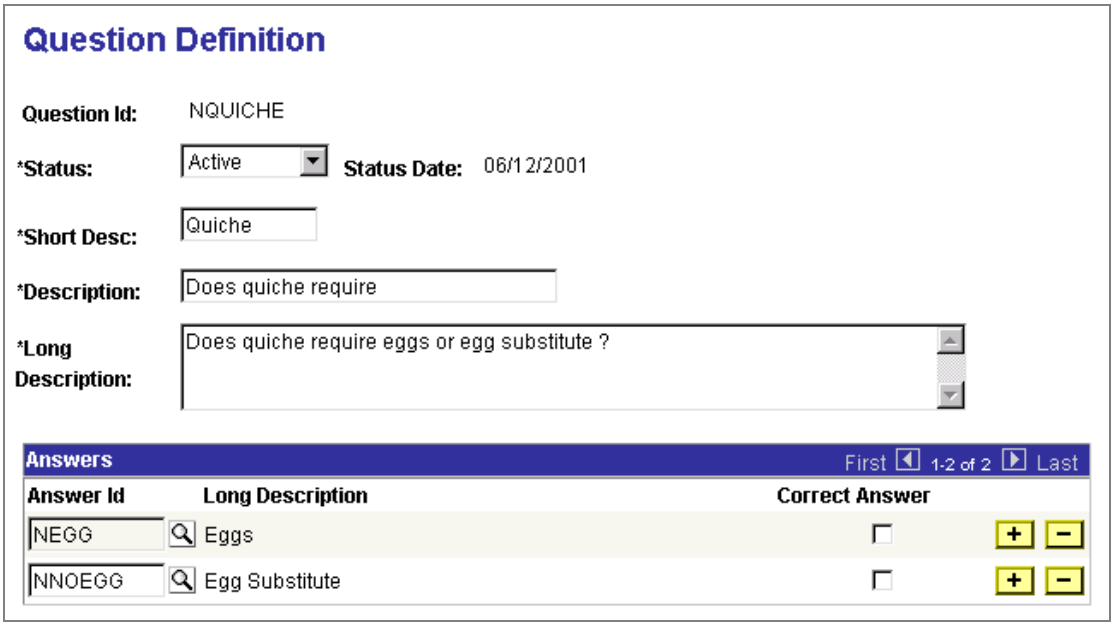
Answer Definition page

Answer ID Enter a code for the answer.

Long Description Enter the answer text.

Defining Questions

Access the Question Definition page.



Question Definition page

Question ID Enter a code for the question.

Status Select a status of ***Active*** or ***Inactive.*** You can add only ***Active*** questions to a question set or a job requisition.

If you change the status to ***Inactive,*** the system displays a warning message if there are active question sets that include the question.

When you change the status, the system automatically updates **Status Date.**

Long Description Enter the text of the question.

Answers

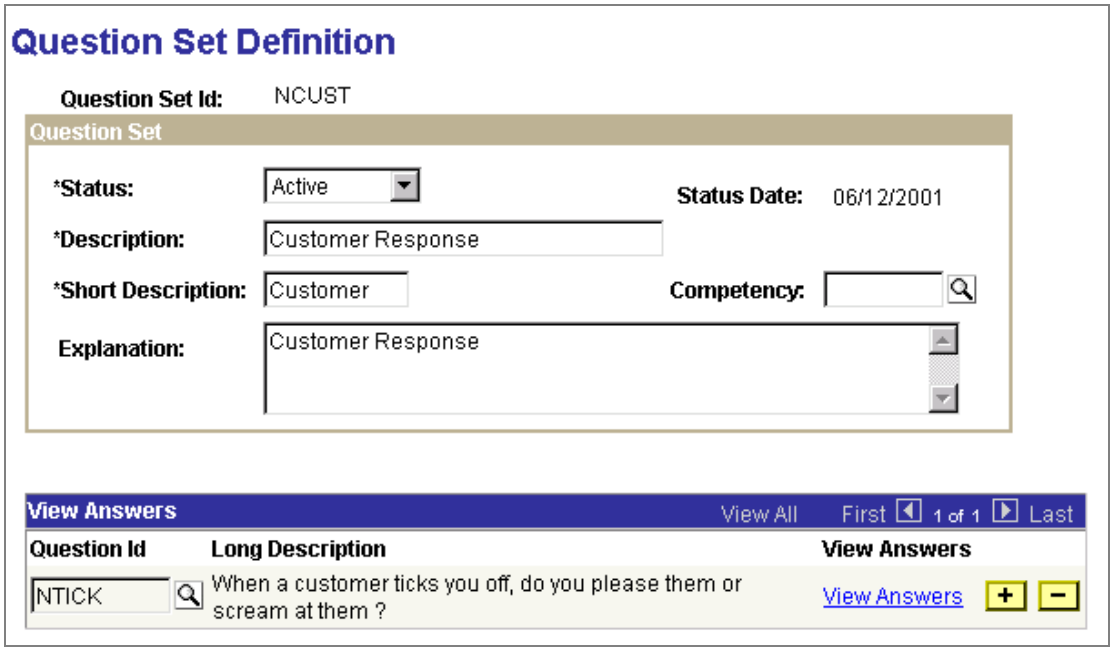
Answer ID Select the answers you want to associate with the question, from the answers you set up on the Answer Definition page. The system displays the answer text in **Long Description.**

You must have at least two, and a maximum of five, possible answers.

Correct Answer Select this check box if the question has one correct answer only.

Defining Question Sets

Access the Question Set Definition page.



Question Set Definition page

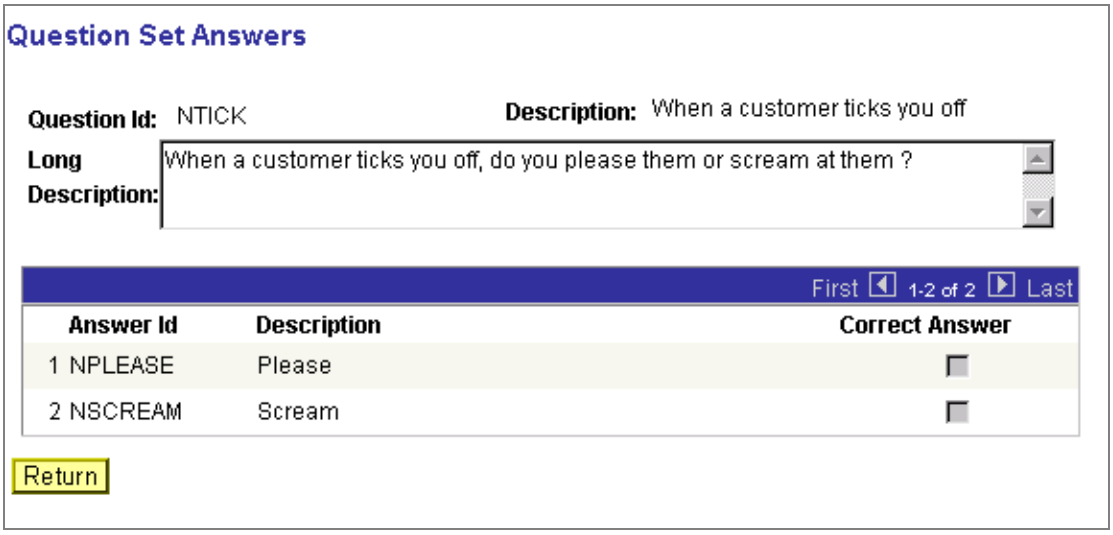
Competency If the questions relate to a particular competency, select the competency from your Competency Table.

View Answers

Question ID	Select a question from the list of questions you have set up on the Question Definition page. The system displays the text of the question in **Long Description.**
View Answers	Click to display the View Answers page where you can view the possible answers linked to the question.

Viewing Answers

Access the Question Set Answers page.



Question Set Answers page

The system displays the answers that are linked to the **Question** you selected. If you want to change the answers linked to a question, use the Question Definition page.

If the question has one correct answer, the system selects the appropriate **Correct Answer** check box.

Creating Job Requisitions

The first step in the Recruit Workforce process is to create requisitions for job openings in your company using the Job Requisition Data pages. This includes:

- Assigning a number to each requisition.
- Entering details about the open job or position, such as the job code and the department where the job opening is located.
- Entering a general job description for job postings, which you can distribute internally before you look to outside sources for new employees.

Here's how you create a job requisition:

1. Enter basic job information on the Job Requisition Information page.
2. Enter job posting information on the Job Posting page.
3. Define the requirements used in requisition screening on the Screening Criteria page.
4. Assign weights to possible answers to questions on the Assign Weights page.

(USF) Creating Job Requisitions

U.S. Federal government installations use the Job Requisition Data component to create job requisitions, but the pages are different. Here's how you create a job requisition:

1. Enter basic job information on the Job Requisition Information page.

   The first page of the Job Requisition Data component includes administrative information, position number or job code information, recruiting office details, and conditions of employment.

2. Define the job requirements used to select and rank applicants on the Federal Screening Criteria page.
3. On the Federal Scoring Criteria page specify the minimum educational level required and define scoring parameters for minimum qualifications, quality ranking scores, and augmenting factor scoring.

Note. U.S. Federal government users create postings using the Job Requisition Posting component.

See Also

"(USF) Creating Job Requisition Postings and USA Jobs Feeds," Creating Job Requisition Postings

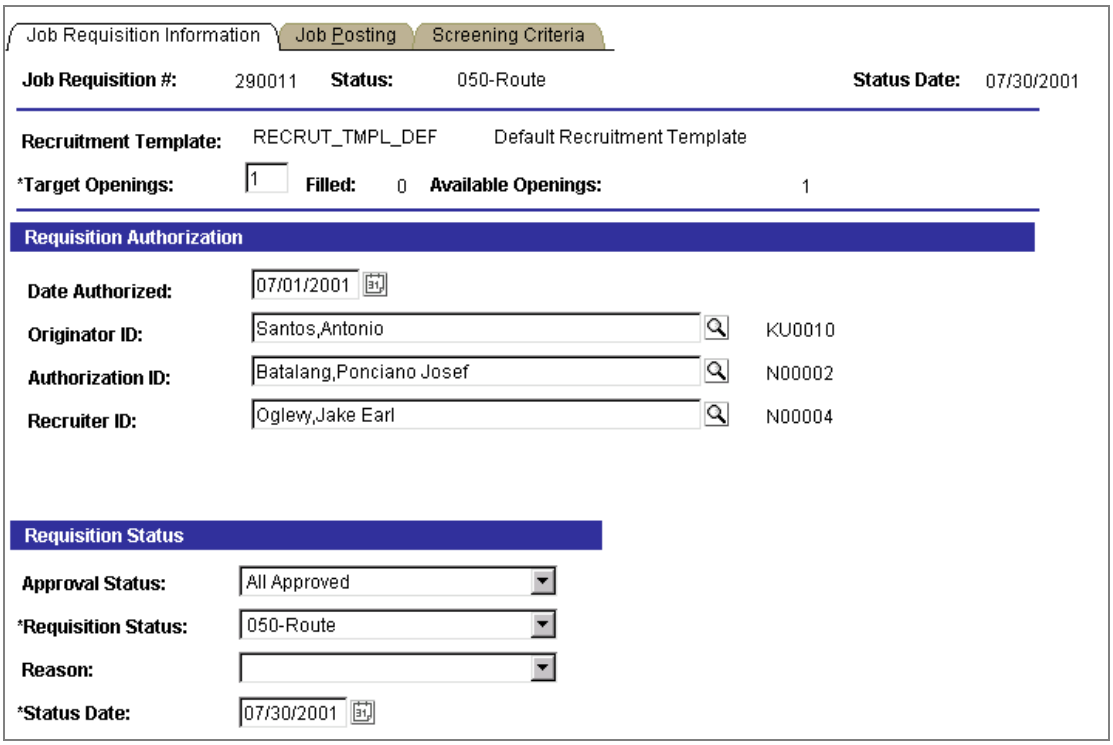
Pages Used to Create Job Requisitions

Page Name	*Object Name*	*Navigation*	*Usage*
Job Requisition Information	ER_JOB_REQ_INFO	Develop Workforce, Recruit Workforce (GBL), Use, Job Requisition Data, Job Requisition Information Develop Workforce, Recruit Workforce (USF), Use, Job Requisition Data, Job Requisition Information	Set up the administrative information for the requisition and record any change to the requisition status.
Recruiting Office Information	GVT_REC_OFFINF_SEC	Click Recruiting Office Information on the Job Requisition Information page	For U.S. Federal government installations only. Enter recruiting office and personnel information.
Candidate Name Request	GVT_NAME_REQ_SEC	Click Candidate Name Request on the Job Requisition Information page	For U.S. Federal government installations only. Enter name of referrals for candidates
Employment Conditions	GVT_RQSN_COND_SEC	Click Employment Conditions on the Job Requisition Information page	For U.S. Federal government installations only. View information about a selected job code. Fields are populated from the Job Code Table. Change the information on this page to meet the requirements of the specific job requisition that you are creating. This information is used to determine basic eligibility in screening applicants.

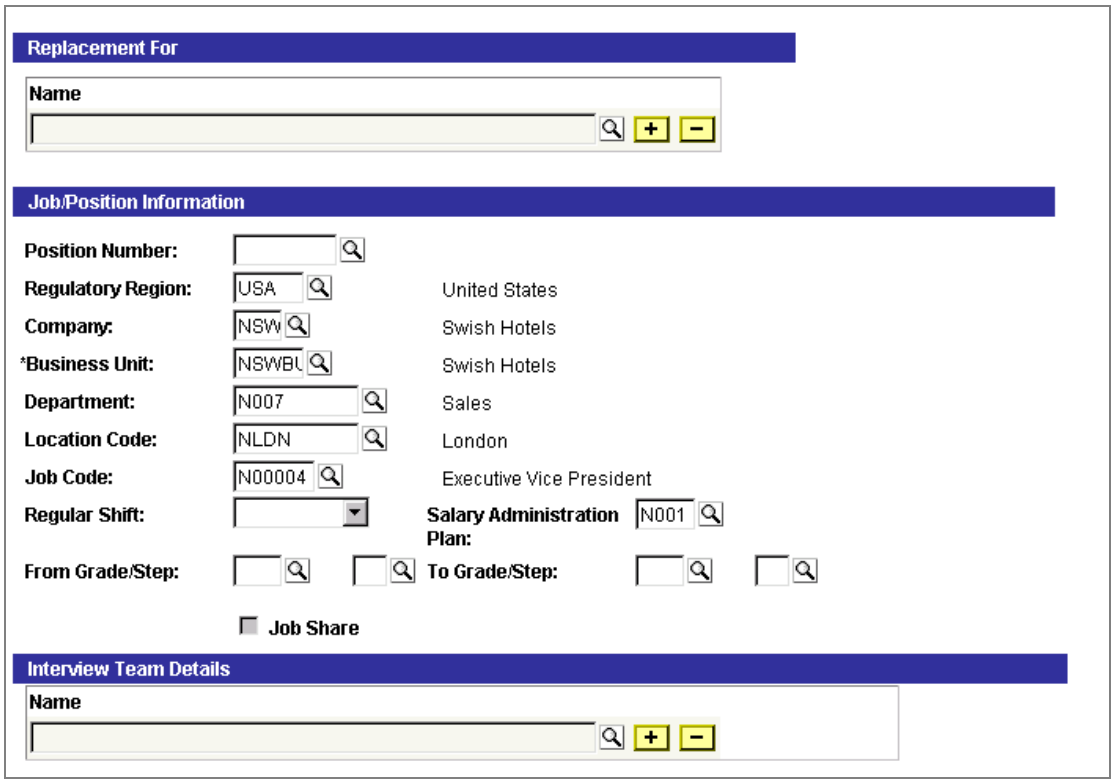
Page Name	*Object Name*	*Navigation*	*Usage*
Job Posting	JOB_REQUISITION3	Develop Workforce, Recruit Workforce (GBL), Use, Job Requisition Data, Job Posting	Record information posted about the job requisition and the types of job postings.
Screening Criteria	ER_JOB_REQ_SCREEN	Develop Workforce, Recruit Workforce (GBL), Use, Job Requisition Data, Screening Criteria	Set up the screening criteria used during requisition screening to match applicants to a job requisition.
Competency Transfer – Default Competencies	HR_REQ_SELECT_COMP	Click Select from Default Competencies on the Screening Criteria page.	View competencies set up for the selected position or job code. Select some or all the competencies to copy to the job requisition.
Accomplishment Transfer – Default Accomplishments	HR_REQ_SELECT_ACCM	Click Select from Default Accomplishments on the Screening Criteria page.	View accomplishments set up for the selected position or job code. Select some or all the accomplishments to copy to the job requisition.
Assign Weights	ER_REQ_ANS_WIEGHTS	Click Assign Weights on the Screening Criteria page.	Assign point values to the possible answers to a question.
Federal Screening Criteria	GVT_ER_JOB_RQ_SCR2	Develop Workforce, Recruit Workforce (USF), Use, Job Requisition Data, Federal Screening Criteria	For U.S. Federal government installations only. Set up additional screening criteria that is used during basic eligibility process. Define qualifications required, assign a crediting plan, competencies, and accomplishments.
Federal Scoring Criteria	GVT_ER_JOB_RQ_SCOR	Develop Workforce, Recruit Workforce (USF), Use, Job Requisition Data, Federal Scoring Criteria	Define the scoring limits for minimum qualifications, quality ranking scores, and augmenting factor scoring.

Entering Basic Job Information

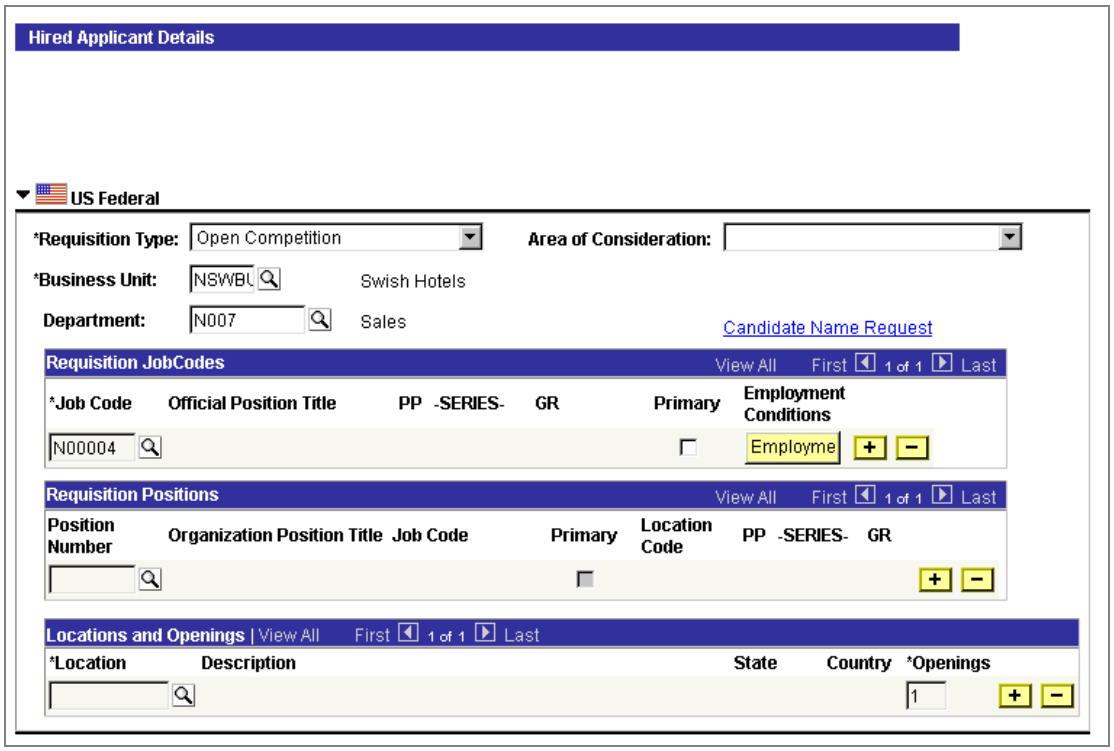
Access the Job Requisition Information page.



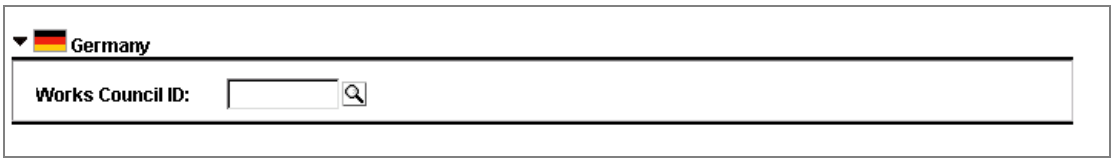
Job Requisition Information page (1 of 4)



Job Requisition Information page (2 of 4)



Job Requisition Information page (3 of 4)



Job Requisition Information page (4 of 4)

Job Requisition # (job requisition number)

Enter a job requisition number.

If the system automatically assigns a new job requisition number, it first appears as *000000.* The actual number assigned to the requisition appears after you save the information that you enter in the Job Requisition Data pages.

Important! To avoid maintaining two different sets of job requisition numbers, we recommend that you either always assign numbers manually or always let the system do it; do not do both.

Recruitment Template

Select the template to use for the job requisition. Set up templates using the Recruitment Template Settings page.

Target Openings

Enter the maximum number of applicants that you can hire for the requisition.

Encumbrance Date Indicator

If your organization uses Commitment Accounting for budgeting, indicate how the system will budget for the unfilled position. Select one of these options:

Authorization Date: Use this option to start budgeting for the position from the date that it is authorized, as indicated in the **Date Authorized** field.

Project Fill Date: Use this option to start budgeting for the position from the date that you expect to fill the position as indicated in **Projected Fill Date.**

If you're not using Commitment Accounting, leave this field blank. This field is not displayed for U.S. Federal government users.

Projected Fill Date

If you selected *Project Fill Date* in the Encumbrance Date Indicator field, enter the date that you expect to fill the requisition.

Requisition Authorization

The authorization information entered here is used in PeopleSoft eRecruit Manager Desktop self-service transactions to determine which requisitions a manager or recruiter can access. This information is also used by the workflow in the self-service transactions for approving job requisitions and approving job offers.

Date Authorized	The date that the requisition was approved.
Originator ID	The person who requested the requisition. Usually this is the manager who needs to hire new staff.
Authorization ID	The person who approves the job requisition.
Recruiter ID	The person responsible for managing the recruitment process. Typically, this is someone from your Human Resources department.
Recruiting Office Information	This link appears for U.S. Federal government users only. Click the Recruiting Office Information link to enter recruiting office and personnel information.

Requisition Status

Use this group box to track the progress of the job requisition. Each time the job requisition status changes, add a new row.

Approval Status	This field is used in PeopleSoft eRecruit Manager Desktop self-service transactions for approving job requisitions. Recruiting administrator can override the value from this page. Select from the available options: ***All Approved:*** Select if the requisition is approved by both the recruiter and authorizer. ***Needs Approval:*** Select if the requisition is not approved. ***In Approval Process:*** Select if the requisition has been approved by either the authorizer or recruiter. ***Denied:*** Select if approval for the requisition has been denied. The system automatically updates this status when managers and recruiters use the Create Job Requisition self-service transaction. Requisitions can't be viewed in View Job Postings unless approval status is ***All Approved.***
Requisition Status	Select the status for the requisition. Use the status values supplied by PeopleSoft or define your own status values and rules. Define status codes in the Status/Reason table.
Reason	Select the reason for the selected requisition status. For the *Open* status, PeopleSoft delivers the following reasons: ***Job/Position Vacated, New Authorization, New Job/Position,*** and ***Temporary Assignment.***

If you use Position Management, drive part or all of the system by position, and use the budgeting feature, you can generate a report listing all vacant budgeted positions. You can also generate job requisitions automatically for all active, vacant, and approved budgeted positions.

Replacement For

If the requisition is to replace existing employees, select the employee names.

Job/Position Information

This group box is not displayed for U.S. Federal Government installations. For such users, job/position information is entered in the US Federal group box.

Position Number

If your organization uses Position Management, select the position number to which the job requisition applies. When you navigate out of this field, the system completes the fields with the default data from Position Data and makes most of the fields unavailable for entry. The only fields you can update are **Salary Administration Plan, From Grade/Step,** and **To Grade/Step.**

If you are not using Position Management, or if you are using partial Position Management and the requisition does not relate to a position, leave this field blank.

Define positions in Position Data.

Job Share

This check box is for information only. The system automatically selects it if the position permits job sharing.

Job Code

Select from the list of valid values. When you navigate out of this field, the system populates the **Salary Administration Plan** from the Job Code Table.

Set up job codes in the Job Code table.

Regular Shift

If the job involves working shifts, select the appropriate shift. Otherwise, leave this field blank or select *N/A (*not applicable).

Salary Administration Plan

Select the plan for the job from the list of valid values.

From Grade/Step, To Grade/Step

Use these fields to define a range of salary grades for the requisition. Select the lower salary grade and step in the From Grade/Step fields and the higher salary grade and step in the To Grade/Step fields.

Interview Team Details

Use this group box to list the expected interviewers for the job requisition. The system uses the interviewers listed here as a default when you schedule interviews for the requisition.

Hired Applicant Details

The system lists the applicants that have been hired for the requisition.

(USF) US Federal

Requisition Type Select from the following available options:

Internal: Only current agency employees are considered.

Merit Promotion: Only current and previous federal employees are considered.

Open Competition: All internal and external applicants and federal employees are considered.

Area of Consideration Select the area that covers the job requisition.

Job Code Select the code applicable for the requisition from the available options and indicate the **Primary** job code. The system displays the **PP-SERIES-GR** (pay plan-series-grade) associated with the job code.

You can create job requisitions by specifying a job code to target more generic jobs.

Employment Conditions Click to open the Conditions of Employment page, where you can review specific information regarding the position.

Position Number If you're using the Manage Positions Business Process and the requisition applies to a specific position within the job code you entered, select a Position Number, which you define in the Position Data pages. The system automatically displays the position's **Organization, Title, Location, Job Code,** and **PP-SERIES-GR.**

Location Automatically appears if you selected a Position Number.

Use the code for a single duty location when there is one that identifies the city or county. When there are several vacancies within a specific state or small geographic area, use the code identifying that state or area. If there are a number of vacancies in different locations, use a duty location that represents a general geographic site. (For example, there could be a need for 10 agriculture inspectors in “Eastern Nebraska” and Southern Iowa” or in a more general area: “Nebraska and Kansas”). When there are multiple vacancies within a specific region of the country (Mid Western, New England, Southeastern states, etc.) use the code identifying that specific region. The listings identify what states are included in that region. Nationwide and continental United States (duty location codes 806 and 1000) are used *only* when one or more vacancies are being announced in each of the 50 states or almost every state, with a minimum of 15 vacancies. When providing a duty location for overseas vacancies, be specific, using the new codes for cities, countries, or continents.

Openings The number of openings for the specific location.

(GER) Germany

Works Council ID For German employees, select the Works Council ID for your requisition (required).

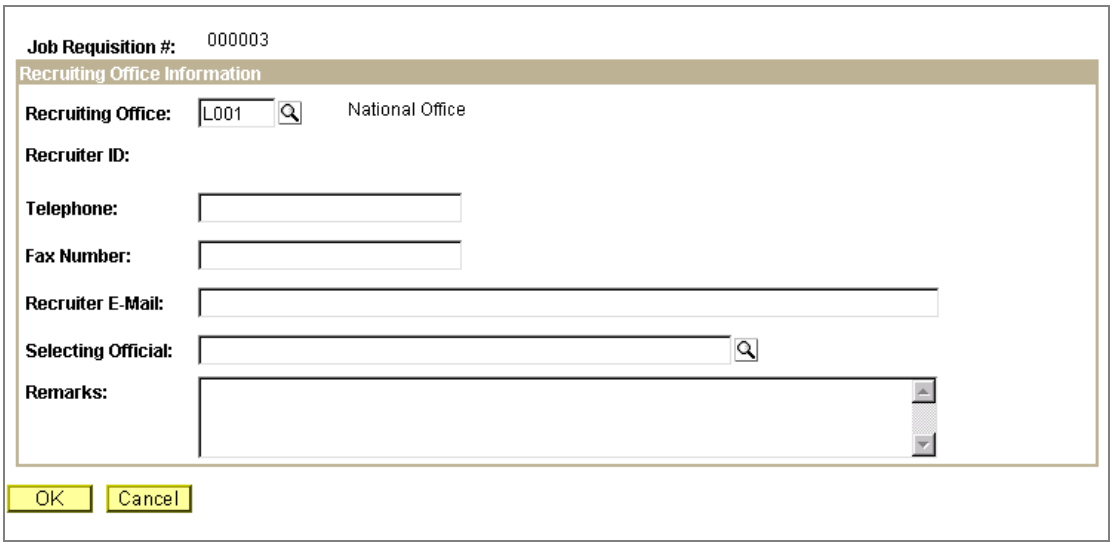
See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, "Setting Up Positions "

"Setting Up Recruit Workforce," Setting Up Recruitment Status Codes

(USF) Entering Recruiting Office Information

Access the Recruiting Office Information page.



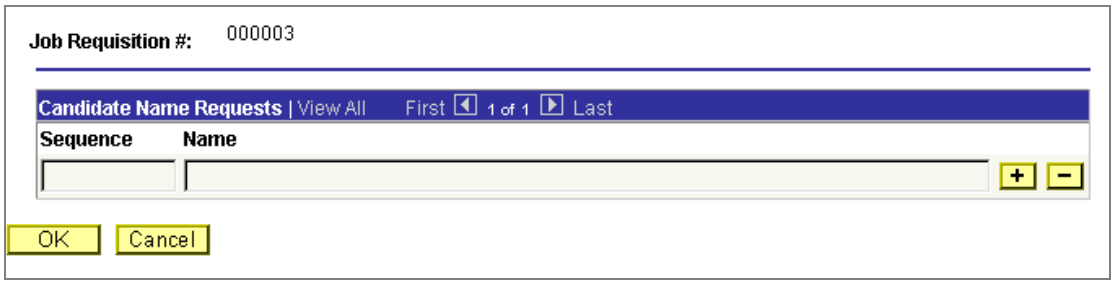
Recruiting Office Information page

Recruiting Office Select the office responsible for the job requisition. Define recruiting offices in the Recruiting Office Table.

Remarks Comments pertinent to the office, specialist, and **Selecting Official.**

(USF) Entering Candidate Name Requests

Access the Candidate Name Requests page.



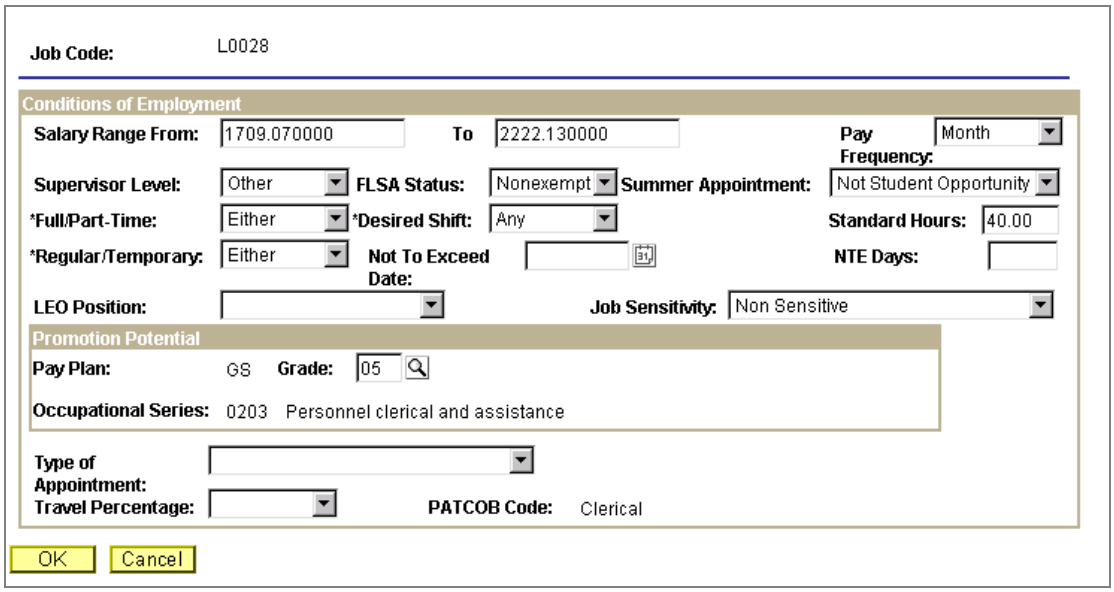
Candidate Name Request page

Enter candidates that you highly recommend for the open job requisition. This information is used in resolving ties in the Applicant Ranking Process.

Sequence If you have more than one candidate, enter the **Sequence** and **Name** for each.

(USF) Entering Conditions of Employment

Access the Conditions of Employment page.



Conditions of Employment page

Salary Range From, To Populated with information from the Job Code Table; you can override these values.

FLSA Status The system displays a status of ***Exempt, Non-Exempt,*** or ***(none).***

Summer Appointment Select if this position is a summer appointment. This information is sent as part of the vacancy information for the USA Jobs program. When there are multiple job

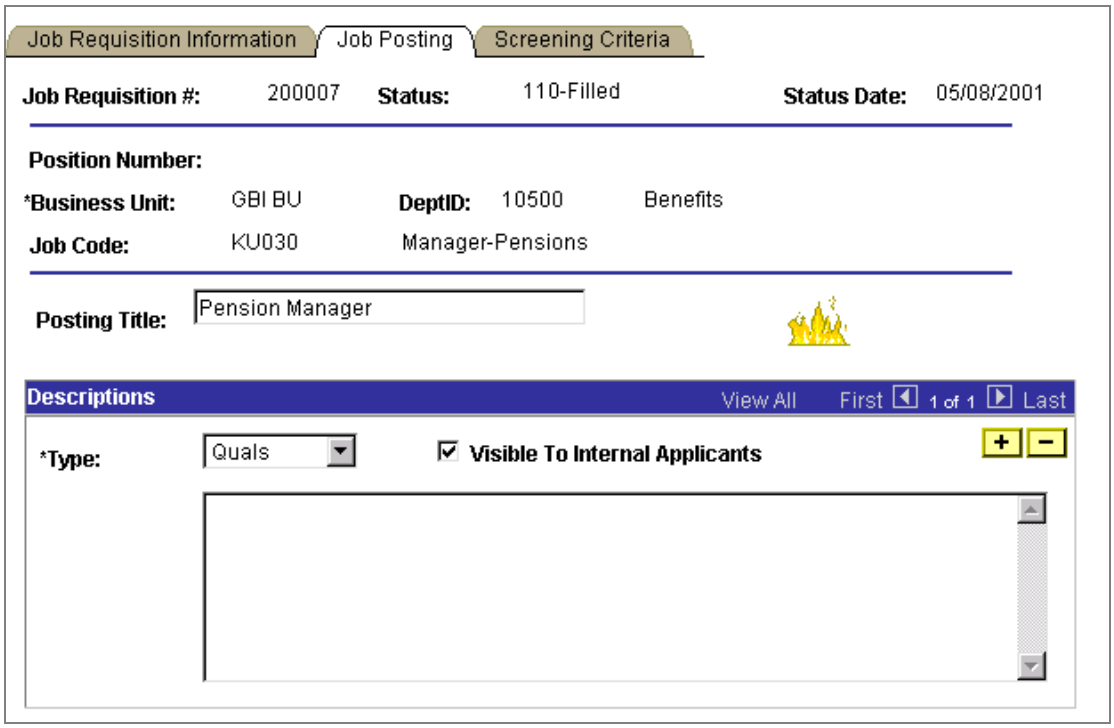
	codes, the primary job code value for summer appointment is used.
Not To Exceed Date, NTE Days (not to exceed days)	Enter values in these fields if the position is ***Temporary.***
LEO Position (law enforcement officer position)	Populated with information from the Job Code Table.
Job Sensitivity	Populated with information from the Job Code Table.
Grade	The grade for the position; you can modify this information.
Type of Appointment	If applicable, select from the available options: as ***Executive (Except Svc Perm), Limited Term (Senior Exec Perm),*** or ***Other (Except NonPerm).***
Travel Percentage	Indicate the percentage required: ***(none), < 25%, 25-50%, 50-75%,*** or ***75-100%.***
PATCOB Code	Populated with information from the Job Code Table.

See Also

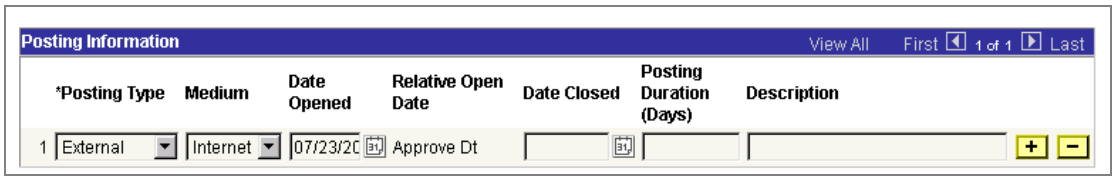
PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs and Pay Groups," Classifying Jobs

Entering Job Posting Information

Access the Job Posting Information page.



Job Posting page (1 of 2)



Job Posting page (2 of 2)

(USF) Note. The Job Posting page isn't displayed for U.S. Federal government users. Creating job requisition postings for U.S. Federal government users is discussed in "(USF) Creating Job Requisition Postings and USA Jobs Feed" in this PeopleBook.

Posting Title

Enter the job or position title. The posting title appears in online job postings and should help applicants decide if the opening is of interest to them.



The system automatically display this icon if the job has been designated a Hot Job by an Employee Referral Program administrator.

Descriptions

Type

Select the description type from these options:

Mkt State (marketing statement): Use to enter company information that appears in the job posting to attract job seekers.

Dep Mrkt (department marketing): Use to enter a description of the department with the requisition.

Resp (responsibilities): Use to enter a description of the main responsibilities of the job.

Quals (qualifications): Use to list the qualifications, experience, and skills that are required for the job.

Closing: Use to enter the information that appears at the end of the job posting. This description normally includes an explanation of how to apply for the job, non-discriminatory declarations, and company tagline or slogan.

Basis Rtg (basis of rating): This type is used by U.S. Federal government users to specify the criteria that will be used to rate applicants.

EEO (equal employment opportunity): Use to enter the EEO statement to appear on the job posting.

How to App (how to apply): Use to enter information that explains how to apply for the job.

Other: Use to enter other descriptions for the job posting.

Conds Empl (conditions of employment): Use to enter the conditions of employment that apply to the job.

Pay, Benef (pay, benefits, and work schedule): Use to enter the special pay, benefits, and work schedule that apply to the job.

CTAP/ICTAP (CTAP and/or ICTAP applicants): This type is for U.S. Federal government users to enter application instructions for the CTAP and/or ICTAP candidates, including required proof of eligibility.

Vet Pref (veteran preference): This type is for U.S. Federal government users to enter instructions for claiming veterans preference.

Who May Ap (who may apply): Use to enter information about the applicants that your organization will accept applications from.

Description

Enter the description of the Type that you selected.

If you have PeopleSoft eRecruit installed and post jobs to online job boards, the descriptions are displayed in online job postings. Applicants viewing your job postings might find it helpful if you include information about job expectations, including the skills and accomplishments that are required.

Note. RecruitUSA imposes a limit of 1600 characters for job descriptions. Keep this in mind as you write descriptions of requisitions that you plan to post to online job boards.

Visible to Internal Applicants Select to include the description in job postings published internally. If the description is not necessary for employees, clear the check box. For example, you might omit the Company Marketing Statement from the job postings that your employees view.

If your organization uses PeopleSoft eRecruit, employees who use View Job Postings see descriptions that have this check box selected.

Note. External applicants using the View Job Postings self-service transaction see all descriptions.

Posting Information

Use this group box to record the job postings you have made for the requisition.

Posting Type Select a posting type from the available options:

Internal: The information is not visible to the public and only employees can view details of the job requisition.

External: The information is made public so external applicants and employees can view details of the job requisition.

Medium Select the medium through which you plan to post this requisition.

If you have PeopleSoft eRecruit Manager Desktop installed and you plan to post the requisition to online job boards, you must select ***Job Board.*** You must also select *External* as the posting type.

Relative Open Date If this is a new posting, select a value to indicate how the system should calculate the start date of the posting. The default value is *Approval Date.* Additional values cover the period from one day after approval through 10 days after approval in increments of one day.

When the requisition is approved, the system calculates the posting start date and displays it in the **Date Opened**

field. You can also enter a date in the Date Opened field and leave the Relative Open Date field blank.

Date Opened — Enter a date here to indicate the start date of the posting, or use the Relative Open Date field and allow the system to calculate the date opened. You can't enter data in both fields.

Date Closed — You can enter the date that the posting should close, or you can enter a number in the **Posting Duration** field and allow the system to calculate the date closed. You may enter either a posting duration or a date closed or leave both fields blank. You may not enter data in both fields.

Posting Duration — You can enter the number of calendar days that the posting should remain active. The system calculates the posting end date and enters it in the Date Closed field.

Description — Enter information about the posting.

See Also

"Administering Employee Referral Programs"

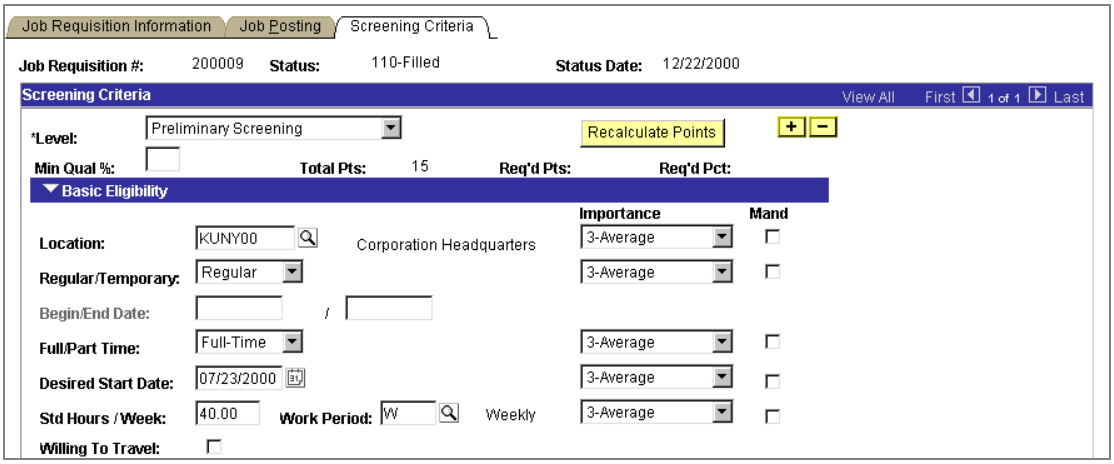
PeopleSoft eRecruit PeopleBook, "Internal and External Applicant Transactions," Viewing Job Postings

"(USF) Creating Job Requisition Postings and USA Jobs Feeds"

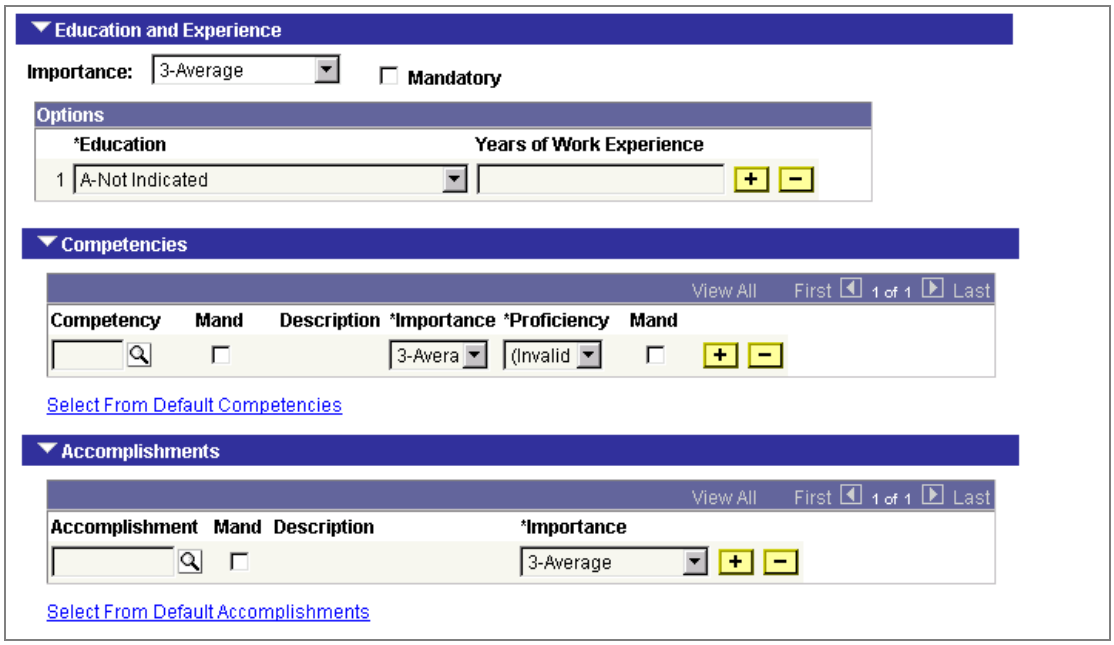
PeopleSoft eRecruit Manager Desktop PeopleBook, "Administering Job Requisitions," Posting Job Openings to Online Job Boards

Defining Screening Criteria

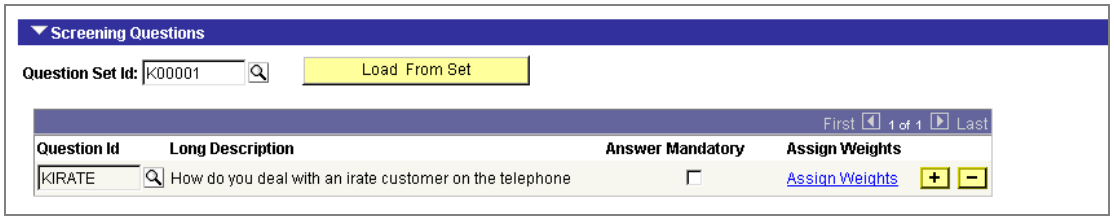
Access the Screening Criteria page.



Screening Criteria page (1 of 3)



Screening Criteria page (2 of 3)



Screening Criteria page (3 of 3)

Note. This page isn't displayed for U.S. Federal government users. Instead, the system displays the Federal Screening Criteria page for defining requisition requirements.

Understanding Screening Criteria

One of the first tasks in the recruitment process is to remove applicants who do not meet your basic job requirements. The Requisition Screening pages automate this task so you can quickly find out which applicants match your requirements. Automated screening depends on the requirements that you set up on the Screening Criteria page. The system compares applicants against the requirements set up on this page and ranks the applicants according to how well they match the criteria.

You can define two levels of screening: preliminary and final screening. Typically, you use final screening to narrow down the applicant pool until you have a manageable number of applicants to review more closely. Therefore, the requirements for final screening tend to be more demanding than those for preliminary screening. For example, you might include additional competencies and accomplishments or set higher proficiency levels for final screening.

Note. In some countries, discrimination laws require organizations to show that applicant screening is based on published job descriptions. If this applies to your requisitions, set up the preliminary screening criteria to match the advertised job description and do not make changes to the criteria. However, you can adjust the final screening criteria, as necessary, to narrow down the applicant list once applicants have passed the preliminary screening stage.

Using the Mandatory Check Box

The **Mand** (mandatory) check box appears next to each of the requirements used for screening. If you select this check box, the system immediately excludes applicants who do not meet this requirement at the first level of screening.

If you clear this check box, the system does not screen out any applicants. In both cases, the system ranks applicants according to how closely they met all the job requirements.

Consider carefully how you use this check box to avoid screening out applicants unnecessarily.

Ranking Applicants

For each screening criterion, you can specify a weight that indicates the importance of that requirement for the particular requisition. Depending on the weight assigned, the system awards an applicant points for each requirement met. Using these scores, the system ranks applicants according to their total point score.

For most screening criteria, the **Importance** field is used to assign a weight for a requirement. There are five options, with an associated point value of 1 to 5:

Importance	*Points*
Low	1
Below Average	2
Average (the default value)	3
Above Average	4
High	5

For screening questions, you assign points directly. For each possible answer to a screening question, define the points awarded to applicants. This allows for extra flexibility, but you must consider carefully the range of points that you assign to screening questions in comparison with other screening criteria. For example, if you award 10 points for correct answers, twice the points awarded for other criteria, this favors applicants who score well on the screening questions even if they don't meet any other criteria.

Level — Select the screening level: ***Preliminary Screening*** or ***Final Screening.***

Min Qual % (minimum qualification percentage) — The percentage that you specify must be greater than or equal to the required percentage. For example, if a job has a required percentage of 85%, the minimum qualification

	percentage must be between 85% and 100%. If it is less, when you save your entries, the system issues an error message.
Recalculate Points	Click to update the **Total Pts, Req'd Pts,** and **Req'd Pct** fields. The system recalculates the points fields based on the values assigned to the Importance fields and Mandatory check boxes.
Total Pts (total points)	The sum of the points associated with all the Importance fields (and the weights assigned to screening questions) on this page.
Req'd Pts (required points)	The sum of all the screening criteria specified as mandatory. Wherever you select the Mandatory check box, the points associated with that requirement are included in the required points total.
Req'd Pct (required percentage)	The percentage of total points that are required.

Basic Eligibility

Use this group box to define the basic requirements of the job.

Location	The system populates the location of the job opening from the Job Requisition Information page. To change it, select a location from the list of valid values. The system automatically updates the Job Requisition Information page. If you selected a position on the Job Requisition Information page, the system populates the location from Position Data and makes the field unavailable for entry.
Regular/Temporary	Select ***Regular*** if the requisition is for a permanent job or ***Temporary*** if the requisition is for a fixed-length contract.
Begin/End Date	If the requisition is temporary, enter the begin and end dates. If the requisition is regular, the system makes these fields unavailable for entry.
Std Hours/Week (standard hours per week)	Enter the normal number of hours worked in a week.
Work Period	The period in which the employee must complete the standard hours. This field is for informational purposes and you should not change the default value of *W* (weekly).
Willing to Travel	Select if the job regularly involves travelling. When you select the check box the system displays the **Percent** (percentage) field, which you use to indicate the amount of time spent travelling.

Education and Experience

This group box lists the education level and years of work experience that are required for the requisition. Often, the amount of work experience required varies according to the education level. To account for this, you can set up several combinations of education and work experience. For example, you might accept an applicant with any one of these combinations:

- No degree and four years of work experience.
- A degree and two years of work experience.
- A master's degree and one year of work experience.

In this case, you create three rows, one for each combination. During requisition screening, the system checks applicant details against each combination. Applicants who match any of the combinations pass the screening.

Years of Work Experience — The number of years of work experience required for the requisition. Applicants who match or exceed this value pass the screening.

Competencies

Competency — Select the competency required for the job requisition from the list of valid values. Set up competency codes in the Competency table.

Proficiency — For each competency, select the proficiency level that is required for the job. Set up proficiency levels in the Rating Model table.

Select From Default Competencies — Click to display the Competency Transfer - Default Competencies page which lists the competencies that you have set up for the position or job code.

Select some or all the competencies to transfer to the job requisition.

Accomplishments

Accomplishment — Select the accomplishment required for the job requisition.

Select From Default Accomplishments — Click to display the Accomplishment Transfer - Default Accomplishments page which lists the accomplishments that you have set up for the position or job code.

Select some or all the accomplishments to transfer to the job requisition.

Screening Questions

Use this group box to define the questions that you want applicants to answer as part of their application. These questions appear in the Apply for Job transaction if you have installed PeopleSoft eRecruit.

Before you can include questions in a requisition, set up the questions and answers. If you want to use standard sets of questions across your organization, you also need to set up question sets.

Question Set Id — If you have set up a suitable question set, select the question set to link to this job requisition and click the **Load From Set** button.

Question Id — If you select a question set, the system populates the questions. You can update the default questions from the question set.

The system doesn't limit the number of questions that you can add. However, it is a good idea to keep questionnaires short to encourage applicants to complete the application. Remember that applicants applying for multiple jobs are presented with a questionnaire that includes all the questions from each job requisition.

Assign Weights — Click to access the Assign Weights page where you assign points to the possible answers.

Note. Screening questions are available only if you have PeopleSoft eRecruit installed.

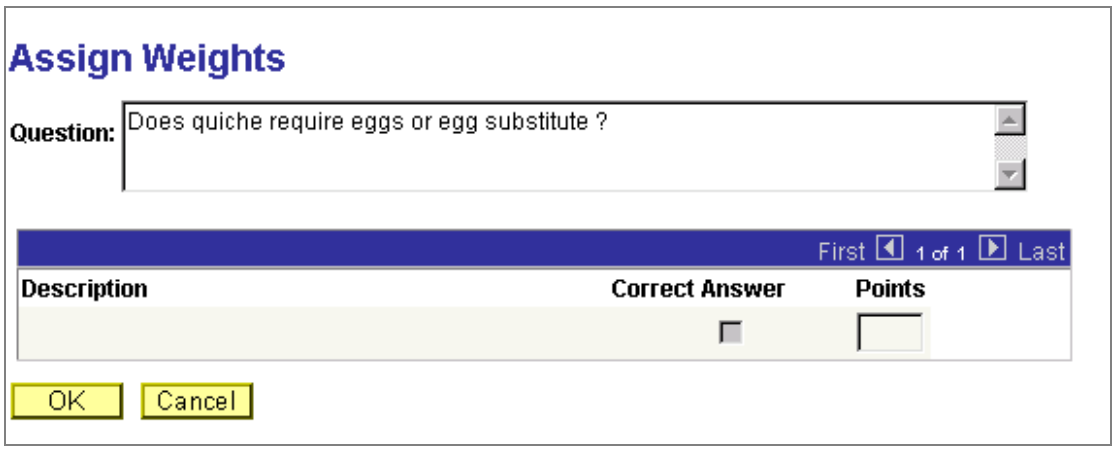
See Also

"Processing Applicants," Screening Applicants

Setting Up Screening Questions

Assigning Weights to Answers

Access the Assign Weights page.

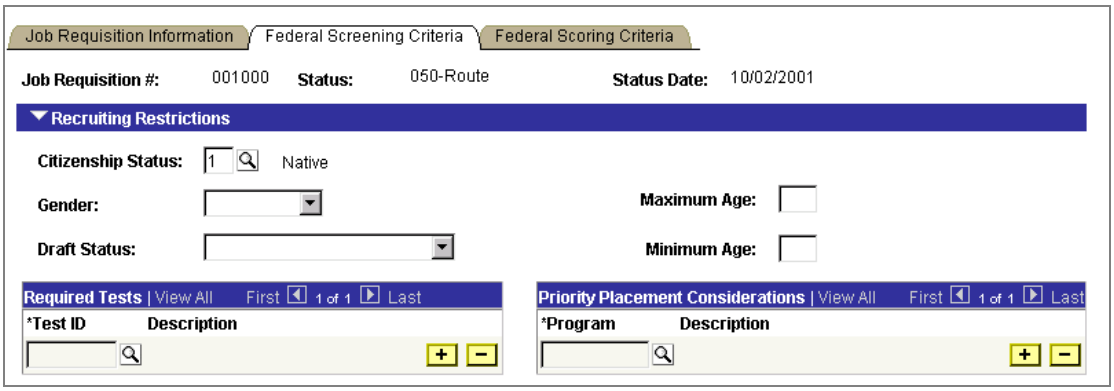


Assign Weights page

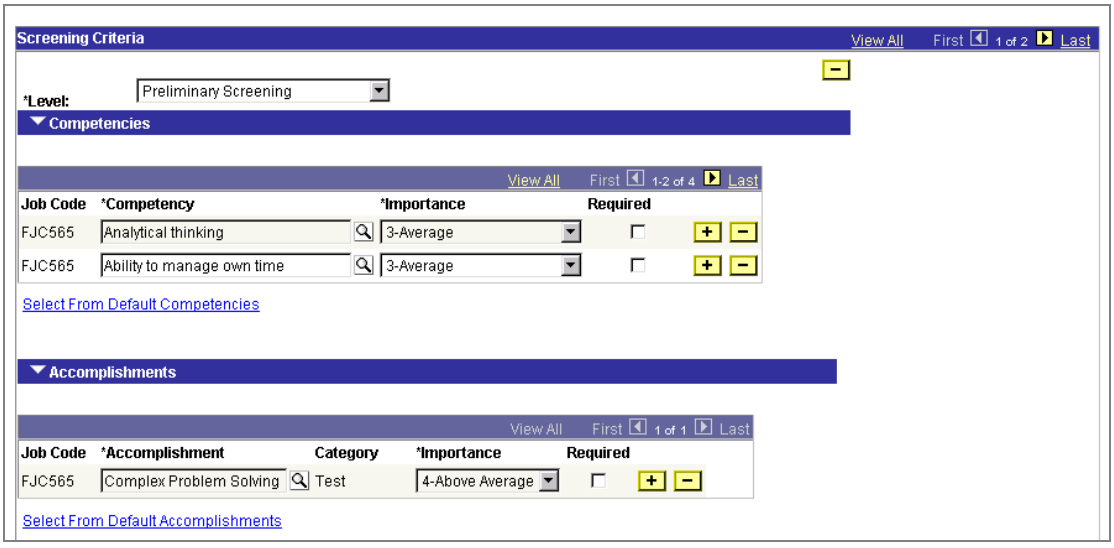
Description	The system displays the answers linked to the question.
Correct Answer	This field is display only. If the question has one correct answer, the system selects this check box. Correct answers are defined when you create the question.
Points	Enter the number of points awarded to applicants for this answer. Requisition screening uses applicants' scores to rank applicants.

(USF) Entering Federal Screening Criteria

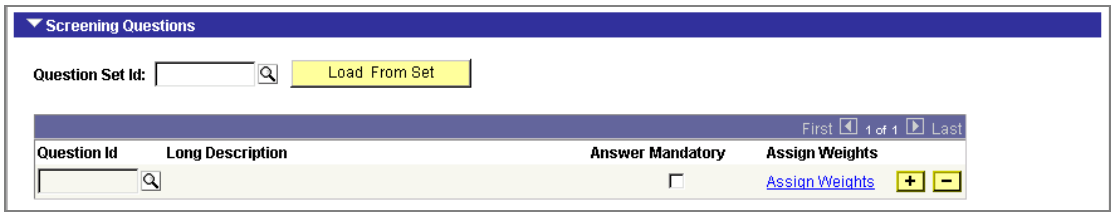
Access the Federal Screening Criteria page.



Federal Screening Criteria page (1 of 3)



Federal Screening Criteria page (2 of 3)



Federal Screening Criteria page (3 of 3)

Understanding U.S. Federal Screening Criteria

For U.S. Federal government users, applicants are evaluated against screening criteria that can include:

- Recruiting restrictions that impact the basic eligibility process
- Competencies and accomplishments
- Screening questions.

  These provide additional information in determining which applicants meet your basic job requirements.

Here is a summary of the Federal requisition screening process:

1. Run the priority placement and basic eligibility processes.
2. Determine minimum qualifications.
3. Apply the crediting plan to all eligible applicants.

These screening processes depend on the requirements that you set up on the Federal Screening Criteria page.

You can define two levels of screening: preliminary and final screening. For U.S. Federal Government users, screening criteria are used as follows:

- Preliminary screening criteria are used to display competencies, accomplishments, and screening questions to applicants applying online using the PeopleSoft eRecruit Apply for Job self-service transaction.
- Final screening criteria are used to apply the crediting plan against eligible applicants to narrow down the applicant pool to review more closely.

It is important that the competencies, accomplishments, and screening questions are identical for both the preliminary and final screening.

For final screening you must also define the crediting plan scoring using the Crediting Plan Scoring component.

Recruiting Restrictions	Identify any restrictions that must be considered in the recruitment and selection process. These are optional fields, and may be used individually or in combinations. This information is applied when screening applicants during the basic eligibility process.
Required Tests	Select tests that are required for candidates applying for the job requisition in the **Test ID** field. Set up tests in the Test Table.
Priority Placement Considerations	Indicate any special considerations for priority status in the **Program** field. Set up priority placement values in the Priority Placement Table.

Screening Criteria

The competencies and accomplishments that you add here form the basis of the Crediting Plan. The Crediting Plan is used to rate those applicants who pass two preliminary qualification phases; basic eligibility and minimum qualifications.

Important! If you modify any of the criteria that you set up in screening criteria after an applicant has been rated, the system automatically deletes the applicant rating scores after issuing a warning informing you that the rating is invalid because of the change.

Level	Select the screening level: ***Preliminary Screening*** or ***Final Screening.***
Job Code	If the requisition has multiple job codes, the system displays the primary job code once the competency is assigned. When you save the component, the system automatically assigns the competencies to all other job codes in the job requisition. When you display the page again, it shows all competencies with every job code in the job requisition. However, only the competencies for the primary job code are changeable.
Competency	Select the competency from the competency table and select an **Importance** level for the competency. **Note.** For U.S. Federal government installations, the Importance field is for information only. It does not have any weighting in the rating process for Federal.
Select from Default Competencies	Click to display the Competency Transfer – Default Competencies page which lists the competencies that you have set up for the position or job code from the Manage Competencies business process. Select some or all the competencies to transfer to the job requisition.

Accomplishment	Enter a value and select the level of **Importance** of the accomplishment.
Reqd (required)	Select for each accomplishment associated with the job requisition.
Select From Default Accomplishments	Click to display the Accomplishment Transfer – Default Accomplishments page which lists the accomplishments that you have set up for the position or job code from the Manage Competencies business process. Select some or all the accomplishments to transfer to the job requisition.

Screening Questions

Note. Screening questions are available only if you have installed PeopleSoft eRecruit.

Use this group box to define the questions that you want applicants to answer as part of their application. These questions appear in the Apply for Job self-service transaction.

The points awarded for screening questions are not included in the U.S. Federal government rating and ranking process.

See Also

Defining Screening Criteria

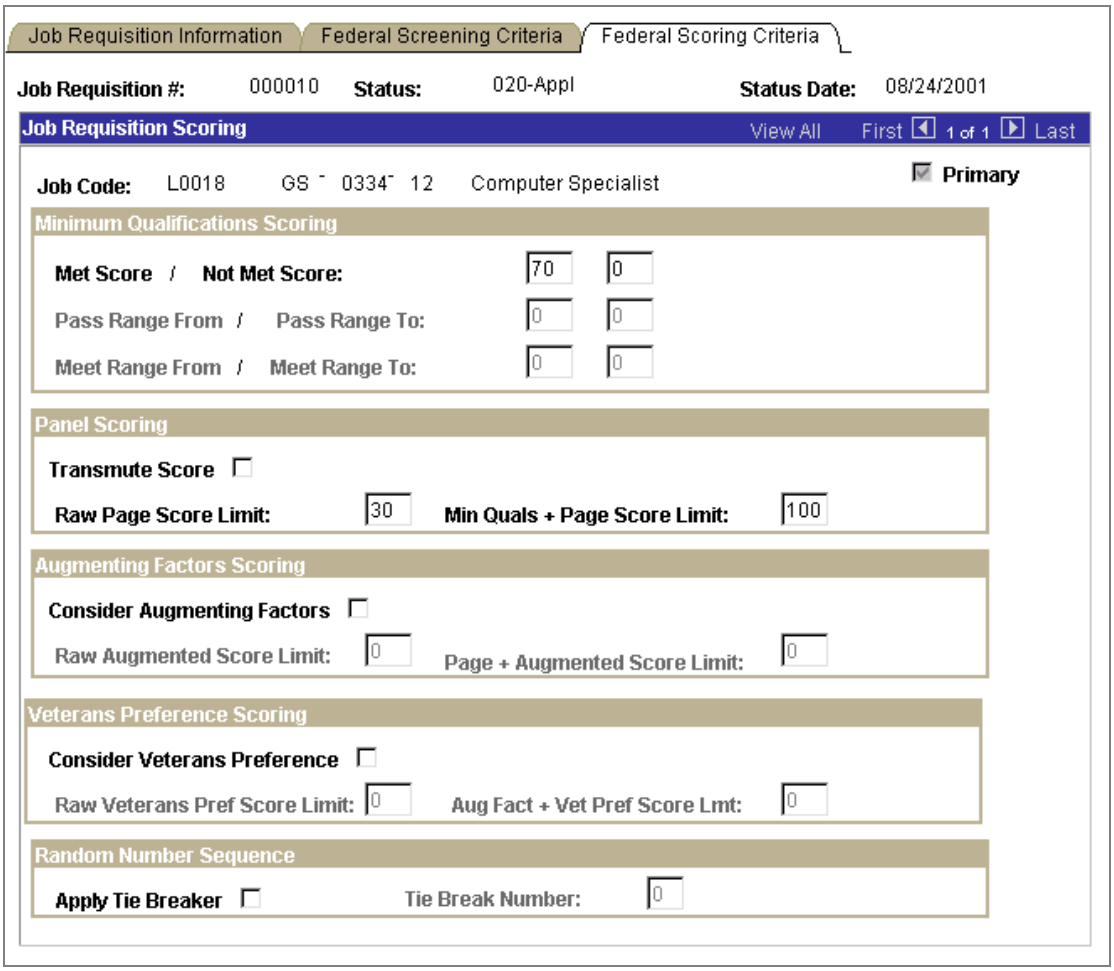
"(USF) Processing Applicant Qualifications"

Assigning Weights to Answers

(USF) Defining Crediting Plan Scoring

(USF) Defining Federal Scoring Criteria

Access the Federal Scoring Criteria page.



Federal Scoring Criteria page

The fields are editable and can be tailored to meet your agency's recruitment requirements. This is especially critical if the scoring limits prevent applicants from qualifying or allow too many applicants to qualify.

Met Score / Not Met Score Entering values in this field makes the **Passing Range From** and **Did Not Meet Range From** fields unavailable.

Transmute Score Select to tally minimum qualifications and quality ranking factors.

Transmute score means to base the scoring on a scale of 100. It is possible to have scores totaling more than 100 in the rating and ranking process. If you do not select **Transmute Score,** then the pages score the lesser of the sum of their total points or the **Raw Panel Score Limit** *or* the difference between the **Min Quals + Panel Score Limit** (minimum qualifications scoring plus panel score limit) and the **Minimum Qualifications Met** score. If you do not enter a **Raw Panel Score Limit,** the comparison with the **Raw Panel Score Limit** is not made.

	If you do select **Transmute Score,** the crediting plan must also have a **Minimum Qualifications Met** score and a **Min Quals + Panel Score Limit.**
Min Quals + Panel Score Limit (minimum qualifications scoring plus panel score limit)	Calculated automatically based on what you entered in **Met Scores /Not Met Scores** and **Raw Panel Score Limit.**
Consider Augmenting Factors	Select if augmenting factors are to be considered. Selecting this makes the **Raw Augmented Score Limit** and **Panel + Augmented Score Limit** fields unavailable.
Raw Augmented Score Limit	Total number of points enabled for augmentation. The recruiting specialist may award augmentation points for certain competencies or accomplishments that are not required for the position but may be given consideration in the selection process. For example, a selective factor might be skill with Microsoft Word. An augmenting factor might be skill with Word art. Suppose the following are augmenting factors: • 5 points: Word art • 5 points: Visio • 5 points: Corel Draw If the **Raw Augmented Score Limit** is ***10,*** an applicant can get credit for only two of these augmenting factors in the selection process.
Panel + Augmented Score Limit	Calculated automatically by adding the **Min Quals + Panel Score Limit** to the **Raw Augmented Score Limit.**
Veterans Preference Scoring	Available when the **Consider Veterans Preference** check box is selected.
Aug Fact + Vet Pref Score Limit (augmenting factor plus veterans preference score limit)	Calculated automatically by adding the **Raw Veterans Pref Score Limit** (raw veterans preference score limit) to the **Panel + Augmented Score Limit**.
Apply Tie Break	Select this check box if you want to apply the tie break. This occurs when two or more eligible competitors have the same ratings in the same preference category. When this happens and you have exhausted all other tie breaking methods, the final procedure to break ties is to do it randomly. This method of tie-breaking must be consistently applied to all certification.

Tie Break Number Enter the agency's random number that is used to find the starting point for the number sequence used to break ties on a certain day.

(USF) Defining Crediting Plan Scoring

After you create a job requisition, define a Crediting Plan for it. The Crediting Plan is used to rate those applicants who pass two preliminary qualification phases; basic eligibility and minimum qualifications.

The Crediting Plan is based on the competencies and accomplishments that you defined on the Federal Screening Criteria page. The system automatically copies the competencies and accomplishments you defined for the job requisition to the Crediting Plan. Assign points for the competency proficiency levels and accomplishments using the Crediting Plan Scoring component.

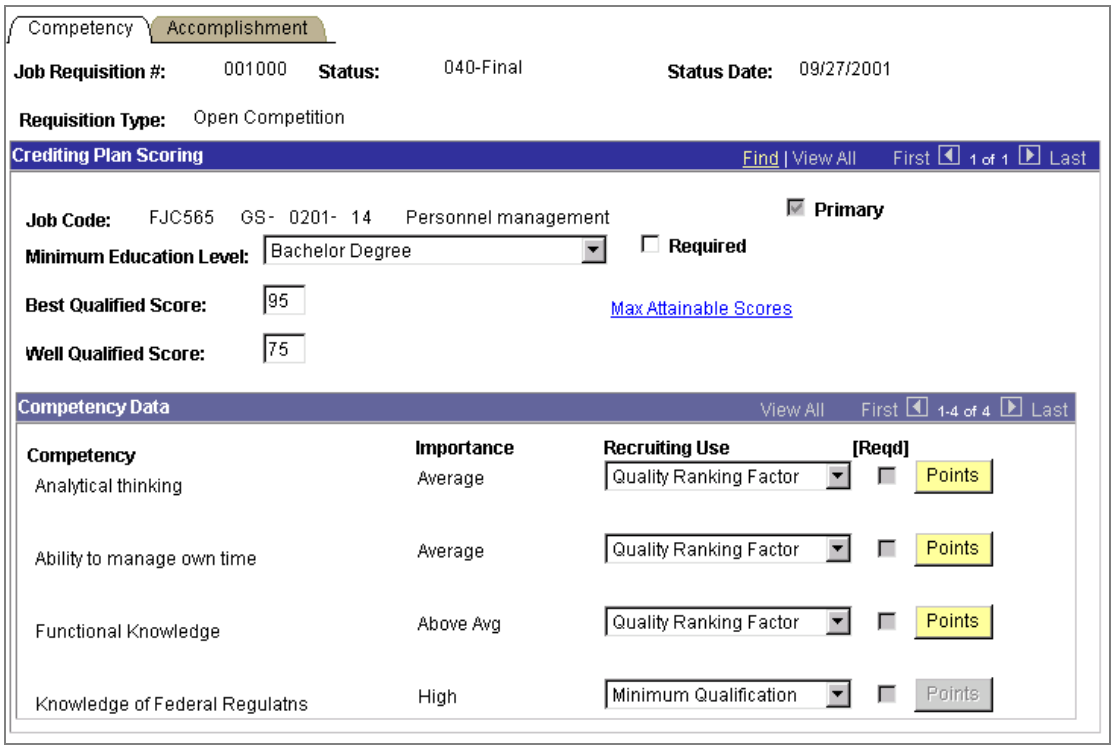
Pages Used to Define Crediting Plan Scoring

Page Name	*Object Name*	*Navigation*	*Usage*
Competency	GVT_CR_PLN_SCORE1	Develop Workforce, Recruit Workforce (USF), Use, Crediting Plan Scoring, Competencies	View the minimum education level and competencies that are required for the job requisition. Select the competencies that are augmenting or quality factors.
Accomplishment	GVT_CR_PLN_SCORE2	Develop Workforce, Recruit Workforce (USF), Use, Crediting Plan Scoring, Accomplishments	View the accomplishments that are required for the job requisition. Assign points for those accomplishments that are augmenting or quality factors.
Proficiency Points	GVT_CR_PLN_SEC	Click the Points button on the Competencies page.	View the ratings for a selected competency and assign points for each rating.

Page Name	Object Name	Navigation	Usage
Crediting Plan Totals	GVT_CP_SCORES_SEC	Click the Max Attainable Scores link on the Competency page or the Accomplishment page.	View the total points for competencies and accomplishments with augmenting or quality ranking factors. As you change the points associated with each accomplishment or competency, the totals change accordingly.

Defining Competency Scoring

Access the Crediting Plan Scoring - Competency page.



Crediting Plan Scoring – Competency page

Best Qualified Score, Well Qualified Score These fields are optional. You might return to them after the applicants have been rated when you begin the evaluation of candidates. This enables you to analyze the scoring to determine the natural breaks and enter values in these fields accordingly.

Minimum Education Level Select the level of education required and select **Required** if this is a mandatory requirement.

Max Attainable Scores — Click this link to access the Crediting Plan Totals page, where you can view the total points for competencies and accomplishments with augmenting or quality ranking factors.

Competency Data

Competency — Competencies and associated **Importance** are populated from the screening criteria you entered on the Federal Screening Criteria. You cannot edit the list of competencies from here.

Recruiting Use — Select ***Augmenting Factor, Minimum Qualification, Quality Ranking Factor,*** or ***Selective Factor.***

Points — Click this button to access the Proficiency Points page, where you assign points awarded for each proficiency level for the selected competency.

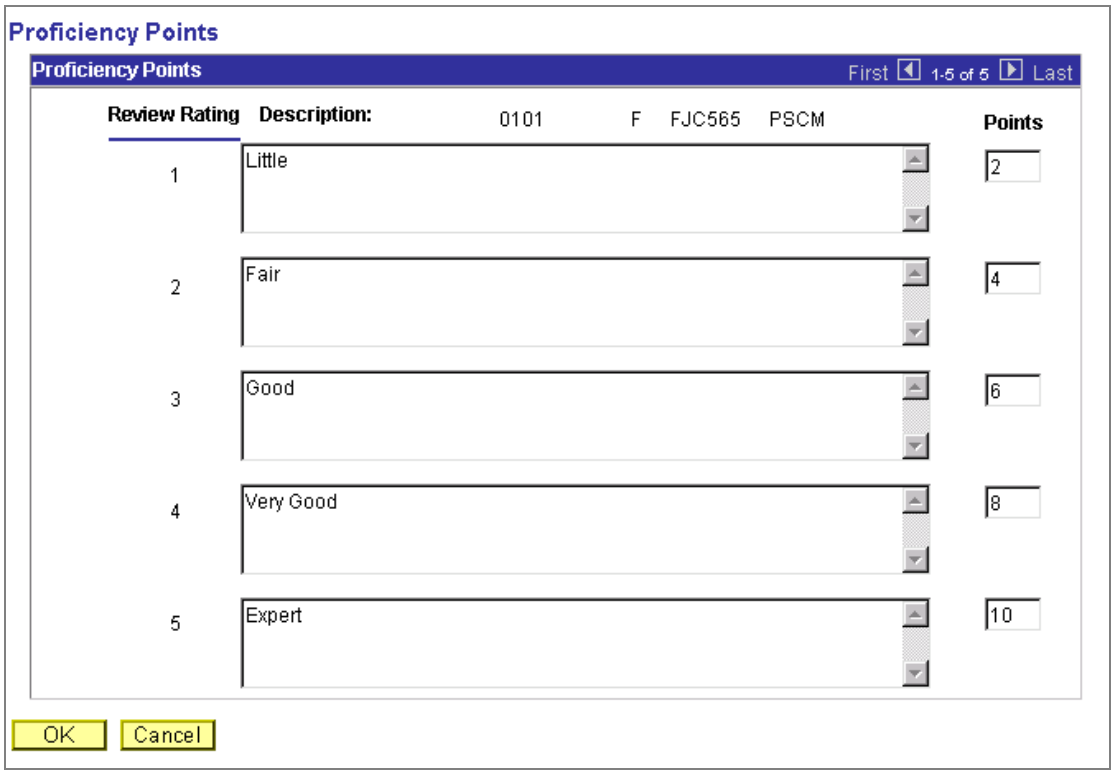
This button is available where **Recruiting Use** is ***Augmenting Factor*** or ***Quality Ranking Factor***. It is unavailable with ***Minimum Qualification,*** and ***Selective Factor.*** This is because applicants receive points in the rating process only from augmenting factors and quality ranking factors. Applicants must meet the minimum qualifications and selective factors, as outlined in the Office of Personnel Management's qualification standards, to be considered minimally qualified, or simply qualified, for the job.

See Also

(USF) Entering Federal Screening Criteria

Assigning Proficiency Points

Access the Proficiency Points page.



Proficiency Points page

Review Rating Populated from Manage Competencies.

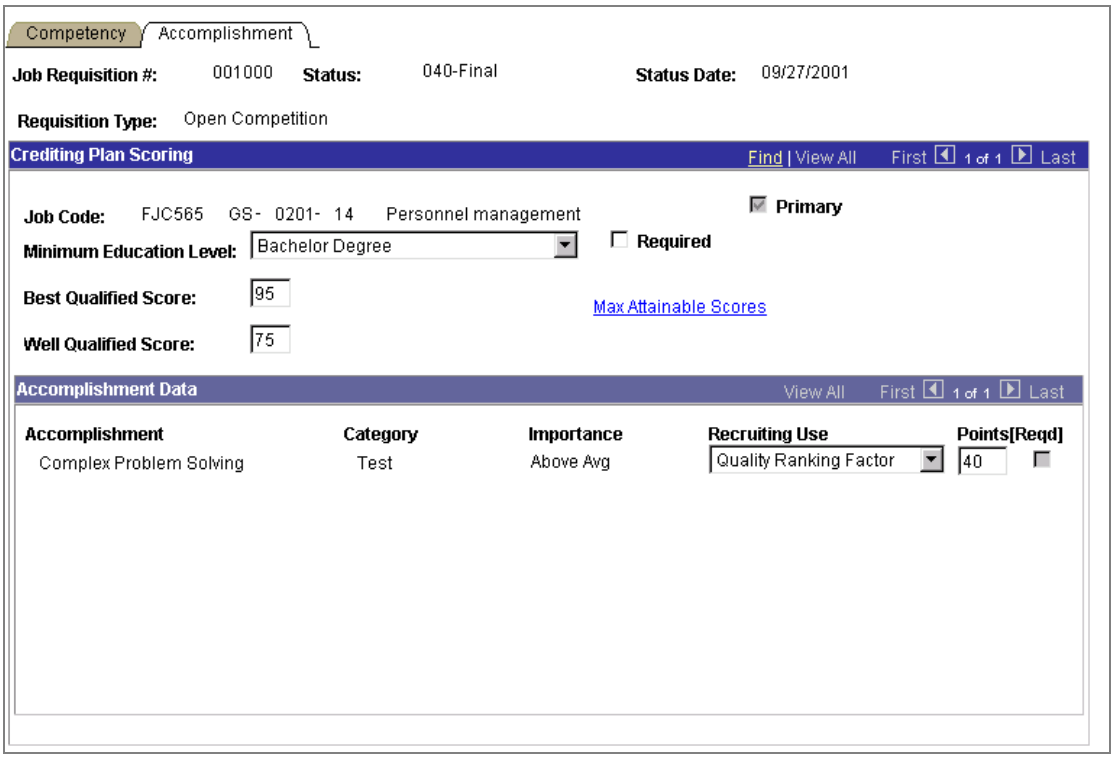
Points Enter the points awarded for each rating level. While all job codes in the job requisition have the same competencies, the proficiency levels required can differ for each job code.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

Defining Accomplishment Scoring

Access the Crediting Plan Scoring - Accomplishment page.



Crediting Plan Scoring – Accomplishment page

Max Attainable Scores Click this link to access the Crediting Plan Totals page, where you can view the total points for competencies and accomplishments with augmenting or quality ranking factors.

Accomplishment Data

Accomplishment Accomplishments and associated **Importance** are populated from the screening criteria you entered on the Federal Screening Criteria. You cannot edit the list of accomplishments from here.

Recruiting Use Select ***Augmenting Factor, Minimum Qualification, Quality Ranking Factor,*** or ***Selective Factor.***

Points Assign points awarded for accomplishments where **Recruiting Use** is ***Augmenting Factor*** and ***Quality Ranking Factor.***

This field is unavailable with ***Minimum Qualification*** and ***Selective Factor.***

Generating Recruitment Job Postings

Once you have created your job requisitions, generate a job posting that includes the following information:

- Job requisition number.
- Job title.
- Salary.
- Description.
- Duties.
- Effective date of the requisition.

The system uses an SQR to extract data from PeopleSoft Human Resources and a Word for Windows macro to merge the data into a form letter template. Before you can generate form letters, you must understand how this process works, how to set up your form letters, and how to set up the process scheduler.

To generate job postings, run the Requisition Posting Report (APP004).

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Generating Form Letters"

Viewing Job Requisition Status

Use the Requisition Status inquiry to view a history of the changes to requisition status. From the Job Requisition Status History page you can immediately see the current status of a requisition and the number of applicants at each recruitment phase. From here you can drill down to each recruitment phase and view applicant information.

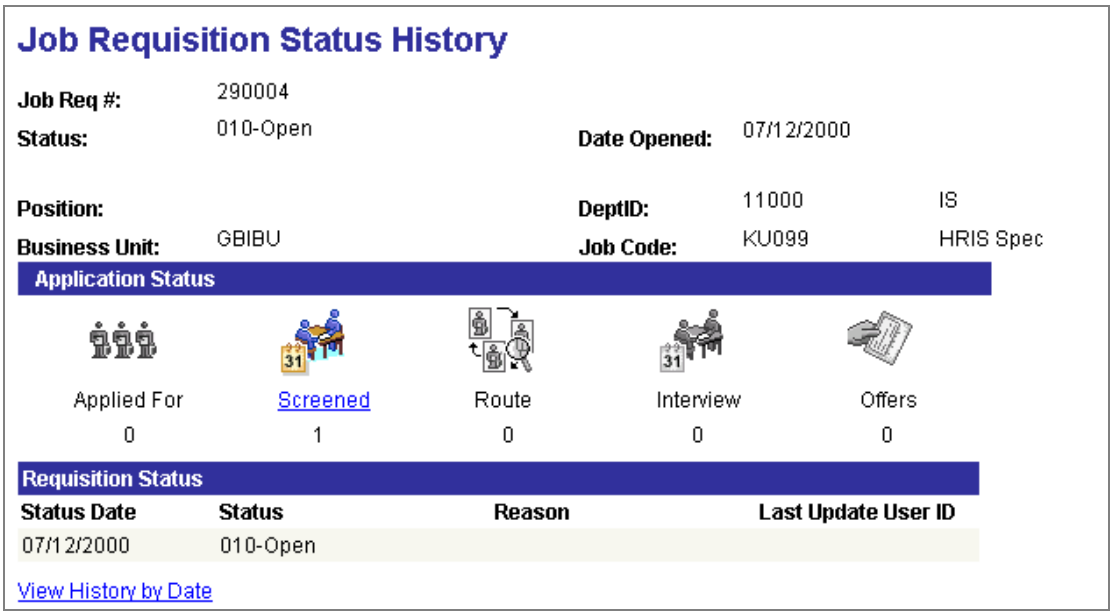
Pages Used in Viewing Job Requisition Status

Page Name	*Object Name*	*Navigation*	*Usage*
Job Requisition Status History	ER_REQ_STS_SUMM1	Develop Workforce, Recruit Workforce (GBL), Inquire, Requisition Status Develop Workforce, Recruit Workforce (USF), Inquire, Requisition Status	View a summary of the job requisition.
Job Requisition Status History Detail	ER_REQ_STATUS_SEC	Click a link in the Application Status group box on the Job Requisition Status History page	View a list of applicants at the recruitment phase you selected (applied for, screened, route, interview, or offer).

Page Name	Object Name	Navigation	Usage
Job Requisition Status History by Date	ER_REQ_STS_SUMM2	Click View History By Date link on the Job Requisition History page	View a history of the status changes made to a job requisition and a list of applicants linked to it.
Applicant Resume	APPLICANT_INFO	Click applicant ID on the Job Requisition Status History Detail page.	View an applicant's full details. This page shows all applicant information, including contact details, preferences, competencies, and accomplishments.

Viewing Job Requisition Status History

Access the Job Requisition Status History page.



Job Requisition Status History page

Application Status

The icons in the middle of this page represent the recruitment stages and the number shows how many applicants are at that stage. Click on the link below the icon, to view access details of applicants linked to the requisition at each stage.

Requisition Status

This lists the dates on which the requisition status changed, the status and reason, and the person who changed the status.

CHAPTER 4

(USF) Creating Job Requisition Postings and USA Jobs Feeds

U.S. Federal users have specific requirements and processes for creating job requisition postings and creating information for the USA Jobs feed. This chapter explains how to:

- Set up codes for job requisition postings and the USA Jobs Feed.
- Create job requisition postings.
- Process the USA Jobs Feed.
- Send the USA Jobs vacancy announcement.

Understanding Job Requisition Postings Process

After creating a job requisition, setting up job requirements and ranking criteria, you create the job posting and submit it to USA Jobs.

An agency can enter jobs and vacancy announcements to the Office of Personnel Management's (OPM) Federal Jobs Database using these methods:

- Bulletin Board Entry.
- USA Jobs Online Entry.
- Job Entry.

The USA Jobs process uses the Job Entry Template method to feed agencies jobs and vacancy announcements to the Federal Jobs Database.

This method submits entries and vacancy announcements by email. The USA Jobs process creates the ASCII 7 bit text file required by the Federal Jobs Database.

Setting Up Job Requisition Postings and USA Jobs Feed

The Federal Job Requisition Postings and USA Jobs Feed uses information that you set up in related Recruit Workforce tables. This section explains how to:

1. Set up distribution lists.

2. Identify recruiting sources.
3. Enter additional recruiting source information.
4. Define recruiting offices.
5. Enter recruiting office phone information.
6. Define standard text for job requisitions.
7. Specify requisition descriptions.

Pages Used to Set Up Job Requisition Postings and the USA Jobs Feed

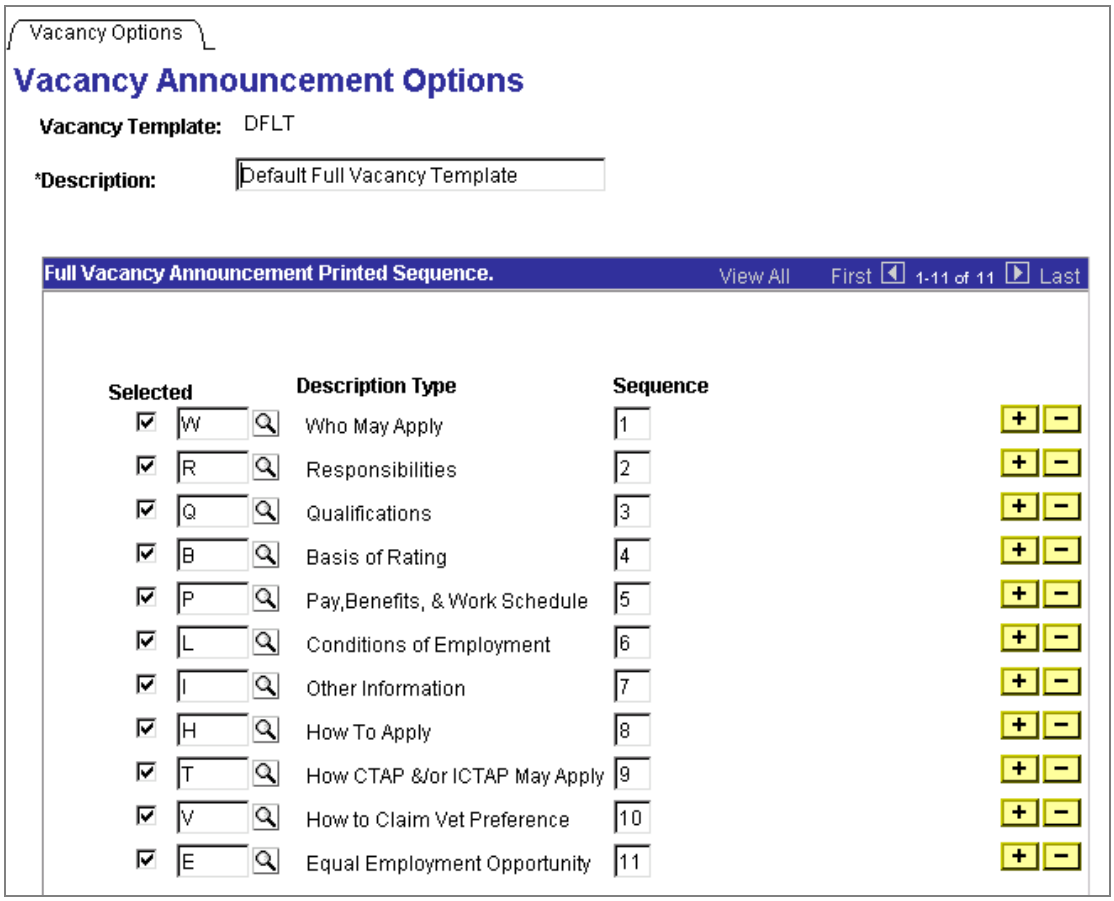
Page Name	*Object Name*	*Navigation*	*Usage*
Distribution List	GVT_RECR_DIST_LIST	Develop Workforce, Recruit Workforce (USF), Setup, Recruiting Distribution List, Recruiting Distribution List	Create lists for distributing vacancy announcements to different recruiting sources. Recruiting sources appear here once you identify them as being included in the specified distribution list. When adding a new distribution list, no recruiting sources appear because no sources have been assigned yet.
Recruiting Source - Recruiting Source1	GVT_RECRUIT_SRC1	Develop Workforce, Recruit Workforce (USF), Setup, Recruiting Source, Recruiting Source 1 of 2	Enter a description, contact name, and address information for a recruiting source.
Recruiting Source – Recruiting Source2	GVT_RECRUIT_SRC2	Develop Workforce, Recruit Workforce (USF), Setup, Recruiting Source, Recruiting Source 2 of 2	Enter all your contact persons' phone numbers and indicate whether to include them in distribution lists.

Page Name	Object Name	Navigation	Usage
Recruiting Office	GVT_RECRUIT_OFFICE	Develop Workforce, Recruit Workforce (USF), Setup, Recruiting Office, Recruiting Office	Define the offices authorized to perform recruiting and staffing functions. Use the personnel office identifier (POI) codes, set up new codes to complement your agency's requirements, or set up shared service centers for specific types of recruiting.
Recruiting Office Phones	GVT_REC_OFF_PH_SEC	Click the Phone Numbers link on the Recruiting Office page.	Enter phone information for a recruiting office.
Recruiting Description - Standard Text	GVT_RECRUIT_DESCR	Develop Workforce, Recruit Workforce (USF), Setup, Recruiting Description, Recruiting Description Text	Create and define common elements of a vacancy announcement that are printed repeatedly. When you create a job requisition, enter all of the description codes that you want to appear. The system populates the job requisition with the associated text. If you need to modify the content for a job, you can edit the text.
Vacancy Options	GVT_VACANCY_OPTNS	Develop Workforce, Recruit Workforce (USF), Setup, Full Text Vacancy Options, Vacancy Options	Specify which requisition description types to use in the vacancy announcement and in what order you want each item printed. This information is also printed on the vacancy announcement free text form when you submit information to USA Jobs.

Note. You can have multiple descriptions for each requisition description type. When the system creates the vacancy announcement, designate which description to use. For example, you might have different descriptions for internal versus external candidates. Make sure that the requisition description types that you want to use are available.

Specifying Requisition Descriptions

Access the Vacancy Options page.



Vacancy Options page

The vacancy announcement templates define the posting description types that appear in the job requisition posting and USA Jobs files, and the order in which the descriptions appear.

Note. If a description type is on the Job Posting, but not in the vacancy announcement template, it is not included on the USA Jobs interface file.

Requisition Description Type — Select the description type you want to appear on the vacancy announcement free text form that is submitted to USA Jobs. Set up descriptions on the Recruiting Description - Standard Text page.

Selected — Select to include the requisition description type in the vacancy announcement. If this check box is clear, the requisition description type is placed at the end of the sequence order.

Sequence Determines the order in which the selected descriptions are printed.

Setting Up Codes for USA Jobs

Here's how to set up information for USA Jobs:

1. Create occupational series title suffixes.
2. Create remark codes.
3. Create location codes.

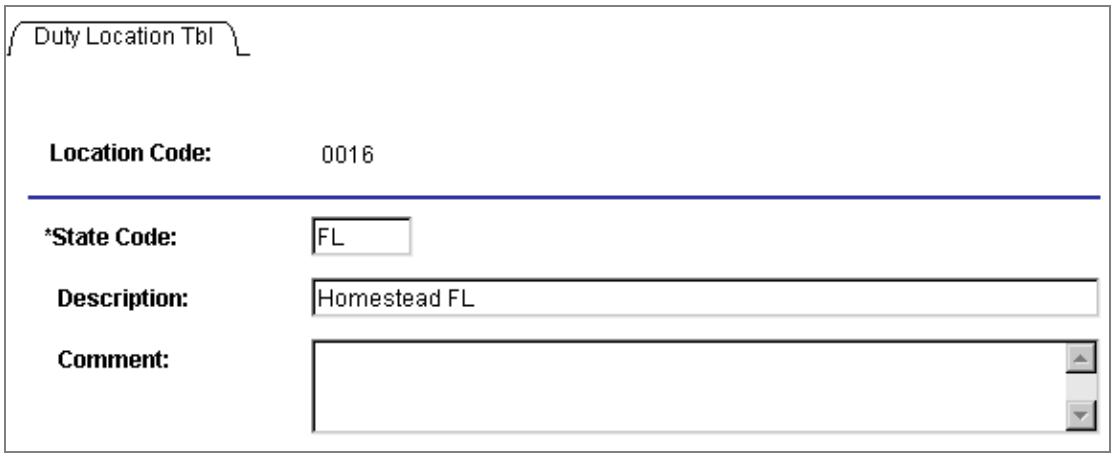
Pages Used to Set Up Codes for USA Jobs

Page Name	*Object Name*	*Navigation*	*Usage*
Gvt Occ Suffix Tbl (government occupational suffix table)	GVT_OCC_SUFFIX_TBL	Develop Workforce, Recruit Workforce (USF), Setup, USA Jobs - Occ Suffix Table, Gvt Occ Suffix Tbl	Create and maintain occupational series title suffixes supported by USA Jobs.
USA Jobs Remarks	GVT_VA_REMARKS	Develop Workforce, Recruit Workforce (USF), Setup, USA Jobs VA Remarks Table, Gvt Va Remarks	Create and maintain the remark codes and descriptions supported by USA Jobs. Remark codes are categorized by remark type for easy identification of remarks.
Duty Location Tbl (table)	GVT_VA_DUTY_LOC	Develop Workforce, Recruit Workforce (USF), Setup, USA Jobs Duty Location Table, USA Jobs Duty Loc Table	Create and maintain the location codes supported by USA Jobs. Location codes are used to identify a specific location or region where there are job vacancies.

You might need to add, delete, or edit values in these tables to comply with changes made by the Office of Personnel Management.

Creating Location Codes

Access the Duty Location Tbl page.



Duty Location Tbl page

State Code Enter the state code associated with the **Location Code.**

Comments Enter additional information regarding the **Location Code.** For example, if the location code represents a large area, you could enter the counties or cities that are included in that area.

Creating Job Requisition Postings

Here's how you use the Job Requisition Posting component to announce job openings:

1. Determine job posting dates.
2. Add details to announcements.
3. Review job code information.
4. Complete job posting descriptions.
5. Add remarks for USA Jobs.
6. Complete posting information for USA Jobs.

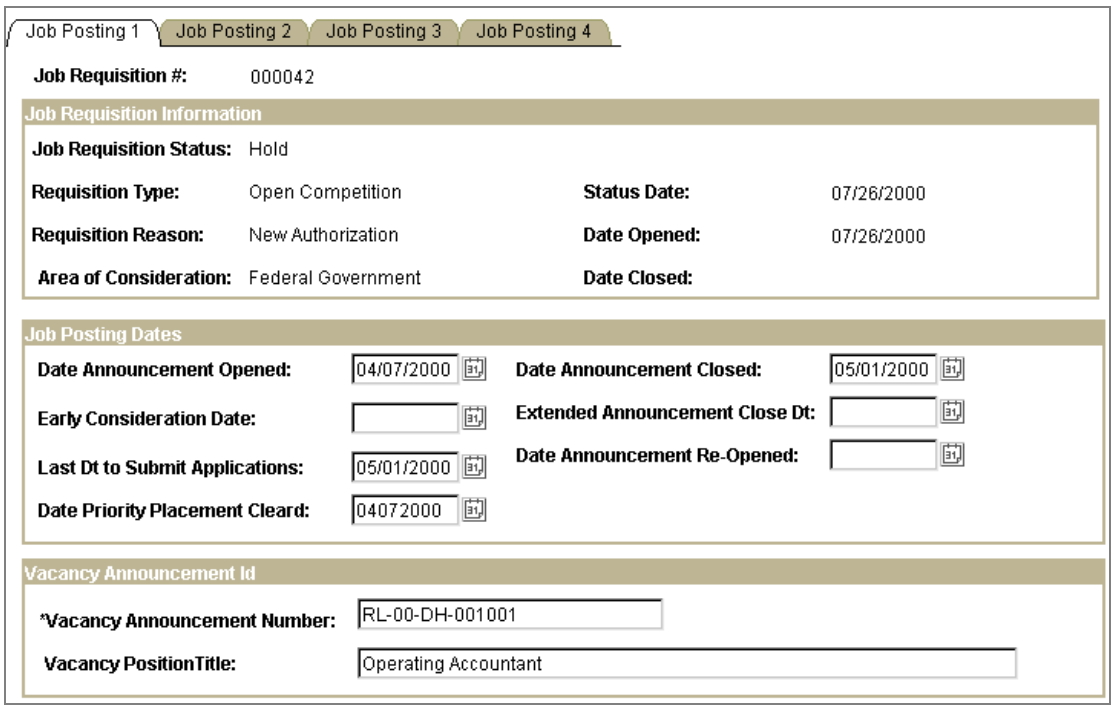
Pages Used to Create Job Requisition Postings

Page Name	*Object Name*	*Navigation*	*Usage*
Job Requisition Posting - Job Posting 1	GVT_RQSN_POSTING1	Develop Workforce, Recruit Workforce (USF), Use, Job Requisition Posting, Requisition Posting 1 of 4	Determine the opening and closing dates of a vacancy announcement, track the vacancy announcement number, and determine the actual position title to be posted on the vacancy announcement. You must have created a job requisition.
Job Requisition Posting - Job Posting 2	GVT_RQSN_POSTING2	Develop Workforce, Recruit Workforce (USF), Use, Job Requisition Posting, Requisition Posting 2 of 4	Add details to vacancy announcements. Add vacancy-specific information including job posting information and descriptions for the job posting.
Requisition JobCodes Information	GVT_JOB_POST_SEC	Click the Requisition JobCodes button on the Job Requisition Posting - Job Posting 2 page.	Review information about the job codes associated with the job requisition.
Description - Primary Jobcode	GVT_JOB_DESCR_SEC	Click the Job Description button on the Job Requisition Posting - Job Posting 2 page.	Complete job posting descriptions. You can copy and paste all or part of the job code description from here into the body of the description to create the wording for the posting.

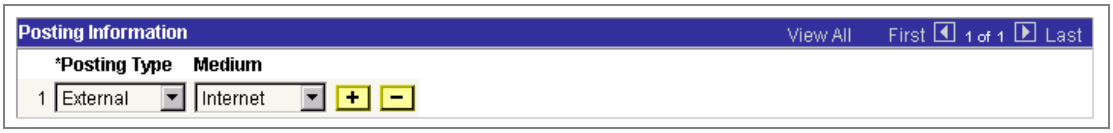
Page Name	Object Name	Navigation	Usage
Job Requisitions Posting - Job Posting 3	GVT_RQSN_POSTING3	Develop Workforce, Recruit Workforce (USF), Use, Job Requisition Posting, Requisition Posting 3 of 4	Add any remarks that you want highlighted for the USA Jobs Bulletin Board. Office of Personnel Management, USA Jobs, delivers a set of predetermined remark codes and descriptions. These remark codes are available and are maintained on the USA Jobs VA Remarks Table page.
Job Requisition Posting - Job Posting 4	GVT_RQSN_POSTING4	Develop Workforce, Recruit Workforce (USF), Use, Job Requisition Posting, Requisition Posting 4 of 4	Complete the information used for USA Jobs Feed.

Determining Job Posting Dates

Access the Job Requisition Posting - Job Posting 1 page.



Job Requisition Posting - Job Posting 1 page (1 of 2)



Job Requisition Posting - Job Posting 1 page (2 of 2)

Job Requisition Information — This group box is populated with information from the Job Requisition table.

Date Priority Placement Cleard (cleared) — If applicable, enter the date after you process priority placement eligibility.

Date Announcement Closed — Enter the date when the job requisition is filled.

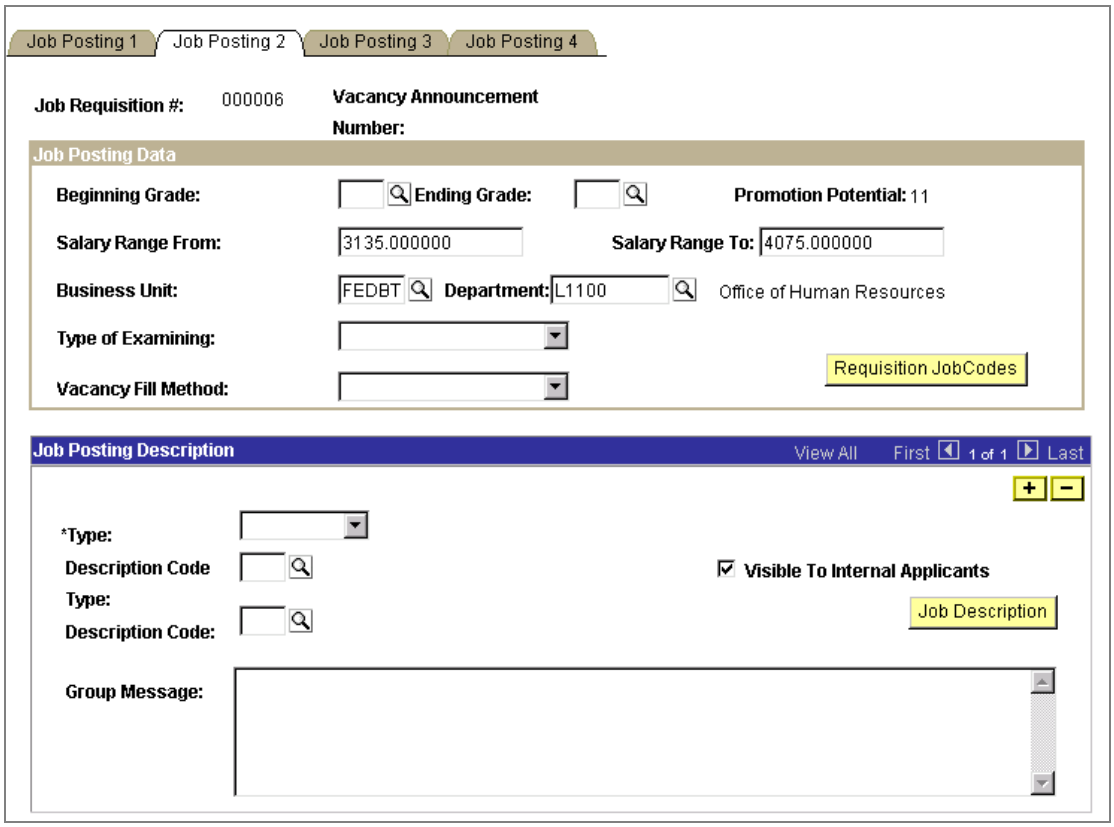
Extended Announcement Close Dt (date) — Enter a value if the job requisition is reopened.

Date Announcement Re-Opened — Enter a value only when the job requisition posting has been closed and reopened.

Vacancy Position Title — Automatically populated from the primary job code title entered on the job requisition. This field is editable to include the pay plan, series, and grade, or, for example, if the job requisition has multiple job codes and you want to include these in the title that appears on the vacancy announcement. For example, ***Interdisciplinary: General Engineer/Physical Scientist, GS-801/1301-12/13.***

Adding Details to Announcements

Access the Job Requisition Posting - Job Posting 2 page.



Job Requisition Posting - Job Posting 2 page

Business Unit — Select the business unit and **Department** where the position is to be filled. These may be different from the ones entered on the job requisition table.

Type of Examining — Select from the available options: ***Competitive, Outside the Register, Pre-Determined Score,*** or ***(none).***

Vacancy Fill Method — Select a value specific to the requisition posting: ***Applicant Inventory, Case Examining,*** or ***(none).*** The system considers all applicants in the applicant pool. Employees must be entered as applicants to be considered.

Job Posting Description — Used to create the actual body text of the vacancy announcement.

Requisition JobCodes — Click to access the Requisition JobCodes Information page, where you can review detailed information for the job code. This information helps you enter information in the **Job Posting Data** group box.

Job Description — Click to access the Description – Primary Jobcode page, where you can view the actual position description of the primary job code entered in the Job Code Table.

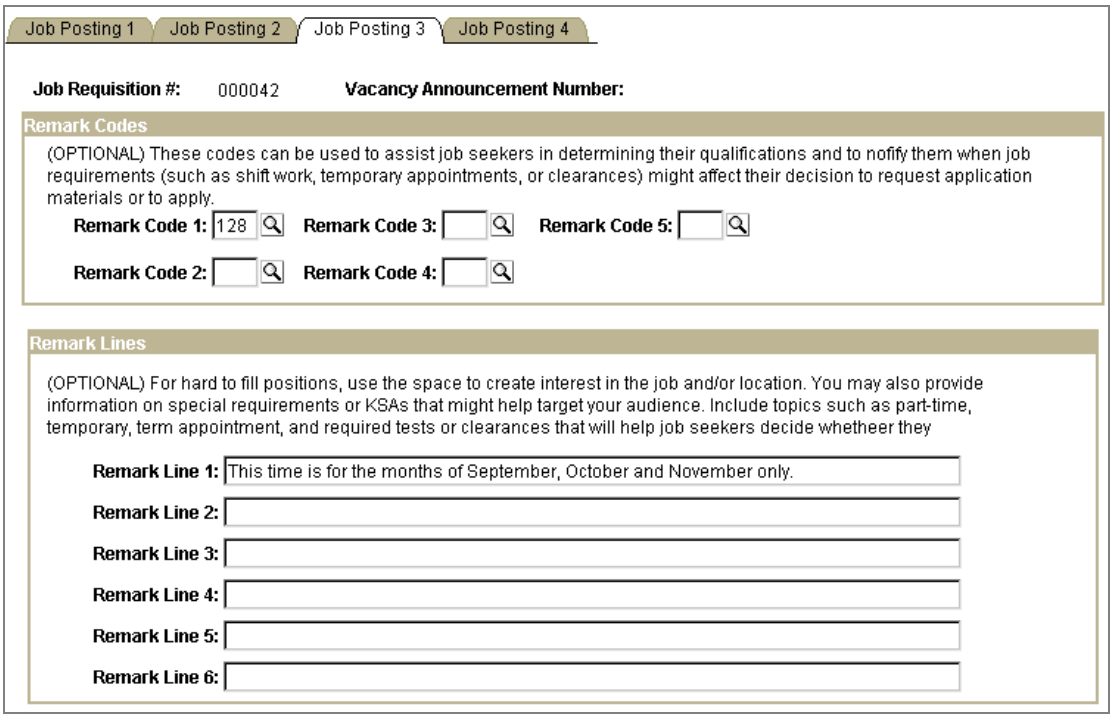
See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs and Pay Groups"

"Administering Job Requisitions," Creating Job Requisitions

Adding Remarks for USA Jobs

Access the Job Requisitions Posting - Job Posting 3 page.



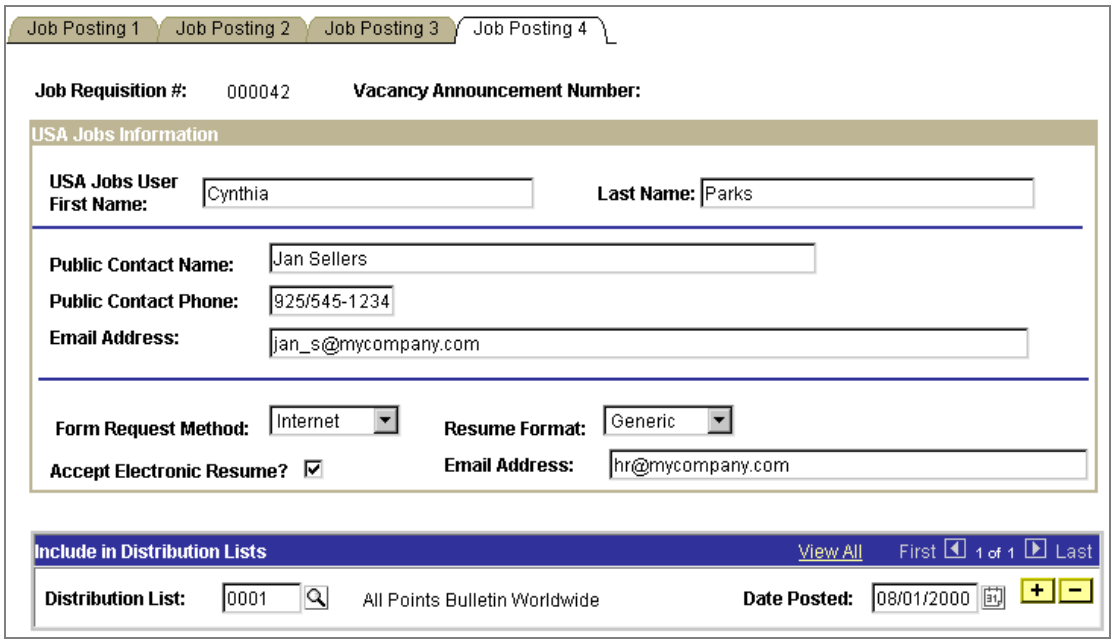
Job Requisition Posting - Job Posting 3 page

Remark Code Enter a code, if applicable, to assist job seekers in determining their qualifications and to notify them when job requirements—such as shift work, temporary appointments, or clearances—might affect their decision to request application materials or to apply. You can select up to five different remark codes.

Remark Line Use lines 1–6 to enter remark text that is not delivered as a standard USA Jobs Remark Code.

Completing Posting Information for USA Jobs

Access the Job Requisition Posting - Job Posting 4 page.



Job Requisition Posting - Job Posting 4 page

USA Jobs Information — Information in this group box is required and is used with the USA Jobs Feed.

USA Jobs User First Name, Last Name — Used if USA Jobs needs to respond to the Feed.

Public Contact Name, Public Contact Phone, Email Address — Used for the applicant to request or respond to a vacancy announcement posted with USA Jobs.

Forms Request Method — Select ***Internet*** or ***Fax.***

Accept Electronic Resume — Select this check box and enter a **Resume Format** and **Email Address** if your agency accepts the USA Jobs online resume.

Distribution List — Select where you want this job posted and enter the **Date Posted** on the distribution list. Create a new row for each distribution list that you post.

Processing the USA Jobs Feed

When you use the USA Jobs program, you can send information to the Office of Personnel Management's USA Jobs electronic bulletin board so that applicants can apply for positions in your organization.

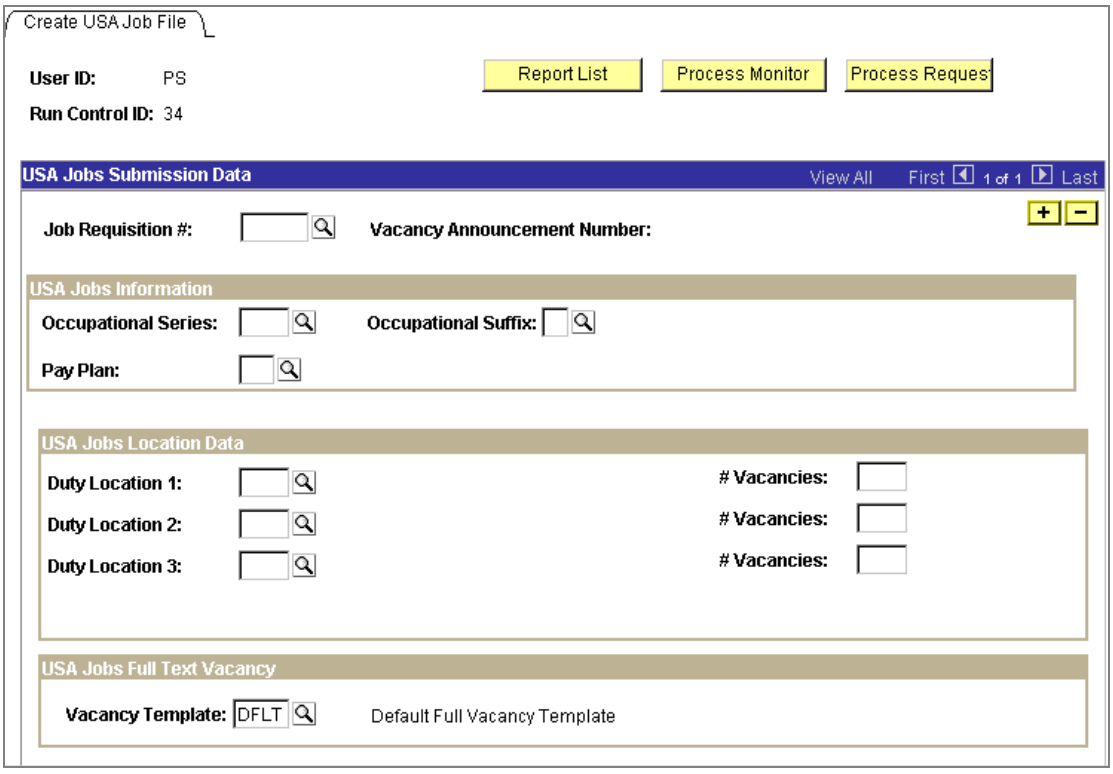
After you have created a job request and it has been posted, process the USA Jobs Feed, which creates the 7-bit ASCII file that is sent to USA Jobs.

Page Used to Process the USA Jobs Feed

Page Name	Object Name	Navigation	Usage
USA Job Summary Files - Create USA Job File	GVT_RUNCTL_USAJOB	Develop Workforce, Recruit Workforce (USF), Process, USA Job Interface Files, Create USA Job File	Create the USA Jobs Feed. Indicate what information you want sent to USA Jobs and run the process to create the Feed. You must have created a job requisition posting before you run this process.

Creating the USA Jobs Feed

Access the USA Job Interface Files - Create USA Job File page.



USA Job Interface Files - Create USA Job File page

Vacancy Announcement Number The number associated with the requisition number.

Occupational Series Select a value. The prompt table displays only the job codes associated with the selected job requisition.

Occupational Suffix	From the delivered prompt table, select a value that references the title of the vacancy announcement position being advertised. If no match is available, leave this blank and the system populates the field and retrieves the title from the Job Posting Table. Occupational suffix values are set up on the USA Jobs – Occ Suffix Table page.
USA Jobs Location Data	Select up to three duty locations for this vacancy announcement. Enter the associated **Vacancies #** (number) for each location. Because of USA Job requirements, you can submit only one file per job code and one file per three different duty locations.

Sending the USA Jobs Vacancy Announcement

Once the USA Job process runs and you create the 7-bit ASCII file, send the file to USA Jobs by email. USA Jobs sends a response with the control number indicating that the feed was successful. Enter tracking information—the USA Jobs control number and when the file was sent—on the USA Jobs Tracking page.

Page Used to Track the USA Jobs Vacancy Announcement

Page Name	*Object Name*	*Navigation*	*Usage*
USA Jobs Tracking	GVT_VA_TRACKING	Develop Workforce, Recruit Workforce (USF), Use, Vacancy Tracking, Gvt Va Tracking	Enter the USA Jobs control number that you received after sending the USA Jobs Feed file. You must have run the Create USA Job Template File (FGHR031) process that creates the USA Jobs Feed.

See Also

Processing the USA Jobs Feed

Creating a Full Vacancy Announcement

After you have created the USA Job Feed, you can generate a hard copy of the full vacancy announcement using the Create Full Text Vacancy (FGHR032) process.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Recruit Workforce Reports

CHAPTER 5

Administering Employee Referral Programs

This chapter gives an overview of administering employee referral programs (ERP) and discusses how to:

- Set up rules.
- Set up employee referral programs.
- Set up and review hot jobs.
- Process eligibility and awards.
- Review and override referral statuses and awards.
- Approve awards.
- Pay awards.

Understanding Administering Employee Referrals

Employee referral programs enable you to reward employees for referring qualified applicants who become hired employees. The employee referral program administrator performs the following tasks to setup and administer referrals:

- Defines ERP rules, programs, and hot jobs.
- Processes eligibility and awards for referrals.

Referrals are submitted through eRecruit self-service transactions or entered through Human Resources Applicant Data pages.

- Reviews and overrides referral data where necessary, including resolving duplicate referrals.
- (Optional) Approves awards.
- Submits awards for payment.

The pages required to perform these tasks are in the Recruit Workforce menu.

Common Terms and Elements Used in This Chapter

Following are some important terms related to employee referral programs that are used in this chapter and in application pages:

Applicant	The applicant who has been referred by an employee. In this chapter, the term also applies when the applicant has been hired and is now an employee.
Award date	The date awards are scheduled to be paid.
Employee	The employee who refers the applicant.
Hot job	A job requisition that falls into a hot job category. Typically hot jobs are critical positions for which the organization pays a higher referral award.
Hot job ID	The identifier of a category of hot jobs. Define awards for the hot job ID that supercedes the award schedule defined for the ERP award category into which the job requisition falls. Hot Job ID refers to the hot job category, not to any individual hot job.
Job requisition	The job requisition for which the applicant is referred or into which the applicant is hired.
Referral Program ID	The identification code that you assign when you define a particular employee referral program. It is a key field for many of the pages addressed in this chapter.

Referral Submission

Employee referral program administrators process referrals that enter the system in one of two ways:

- Self-service transactions in PeopleSoft eRecruit.

  The referring employee or the applicant enters referrals directly through online self-service transactions in PeopleSoft eRecruit.

  Applicants only specify the employee as the referral source. The employee is sent an email asking them to confirm the referral.

  The referring employee must confirm referrals entered by applicants before being considered for any ERP awards.

  PeopleSoft eRecruit functionality also enables the employee to view referral status online.

- Applicant Data pages in PeopleSoft Human Resources: Recruit Workforce.

  The employee referral program administrator enters the referral data through the Applicant Data pages.

This is the only method if PeopleSoft eRecruit is not installed.

The administrator must manually enter the data each time the employee submits an additional referral for the applicant.

See Also

PeopleSoft eRecruit PeopleBook, "Internal and External Applicant Transactions," Employee Referral Transactions"

"Managing Applicants"

ERP Effective Dates

Following is a summary of effective-dating in employee referral programs:

- Rules are not effective-dated.
- Employee referral programs are effective-dated.
- The Use Program As Of field on the Employee Referral Programs setup page determines which effective-dated set of program rules applies to a referral.
    - You can apply the rules that are effective as of the referral date or as of the applicant hire date.
    - The system applies *all* program rules that are in the effective-dated row that is active on the date that you select for the Use Program As Of date.
    - The same rules apply to the referral for the full time span of the award schedule.

  For example, if you select to use program rules as of the referral date, the system applies the eligibility rules, award rules, and award schedule that are in the program's effective-dated row that was active on the referral date. If the award amount for the award category changes between the referral date and the award date, the amount in effect on the referral date is the award amount.

- You can set up an ERP with a retroactive effective date.

  Do this if you want the Use Program As Of date to be the referral date and an eligible referral is submitted before you define an ERP for that job requisition. In this case, the effective date must be retroactive at least to the date of the referral. Otherwise, there would not be any effective program rules for processing the referral.

- Hot jobs are not effective-dated, but the system maintains a historical record of hot job status for each requisition that is or has been a hot job.

Payroll Integration

Employee referral program functionality discussed in this chapter includes a process to integrate referral award payments through PeopleSoft Payroll for North America. If your organization uses a different PeopleSoft payroll application or a third-party payroll application, you can create your own processes for transmitting award data to the payroll system.

See Also

Paying Awards

Setting Up Rules

To set up employee referral programs, first create rules that you use to assemble your various programs and administer hot jobs.

- Employee eligibility rules apply to the employee.

Use employee eligibility rules to define the conditions under which an employee is eligible for award payment under the ERP. For example, you might want to limit eligibility to employees who work in a particular geographic area or type of job. You might want to exclude employees in certain departments or locations. You can create a rule that combines a number of criteria to determine employee eligibility.

- Award category rules apply to the job the applicant is hired into.

Use award category rules to define groups of requisitions that fall into an award category and to set up an award schedule for each category. The referring employee is eligible for awards under an ERP only if the referred applicant is hired into a job that falls into an award category defined for the ERP.

The award schedule that you define for an award category specifies the timing and amount of awards in the category. For example, suppose your organization offers an ERP award of 1000 USD for referred hires in salaried positions and 500 USD for referred hires in non-salaried positions, you would set up two award categories with the appropriate award schedules and amounts. If you offer part of the award 90 days after the applicant is hired and the remainder after one year of employment, you would set up your award schedule to reflect these rules.

- Hot job category rules apply to the job the applicant is hired into.

Use hot job category rules to define and select groups of requisitions that fall into a hot job category and to set up an award schedule for each category. The hot job category award schedule supercedes the award schedule associated with the award category into which the job requisition falls.

See Also

Setting Up Employee Referral Programs

Setting Up and Reviewing Hot Jobs

Pages Used to Name Rules and Create SQL Statements

Page Name	*Object Name*	*Navigation*	*Usage*
Varies by component.	ER_RULE_DEFN	Develop Workforce, Recruit Workforce (GBL), Setup, Employee Eligibility Rules Develop Workforce, Recruit Workforce (GBL), Setup, Award Category Rules Develop Workforce, Recruit Workforce (GBL), Use, Hot Jobs	Name and describe rules used in administering employee referral programs and hot jobs.
Varies by component.	ER_RULE_SQL	Develop Workforce, Recruit Workforce (GBL), Setup, Employee Eligibility Rules, Rule SQL Develop Workforce, Recruit Workforce (GBL), Setup, Award Category Rules, Rule SQL Develop Workforce, Recruit Workforce (GBL), Use, Hot Jobs, Selection	Build the SQL select statements of rules used in administering employee referral programs and hot jobs.

See Also

Setting Up Rules

Naming and Describing Rules

Before you create the SQL for a rule, you must first give it a rule ID, description, short description, and long description. Name and describe rules on the following pages:

- Employee Eligibility Rules page.
- Award Category Rules page.
- Hot Jobs page.

These pages are the first pages of their respective components.

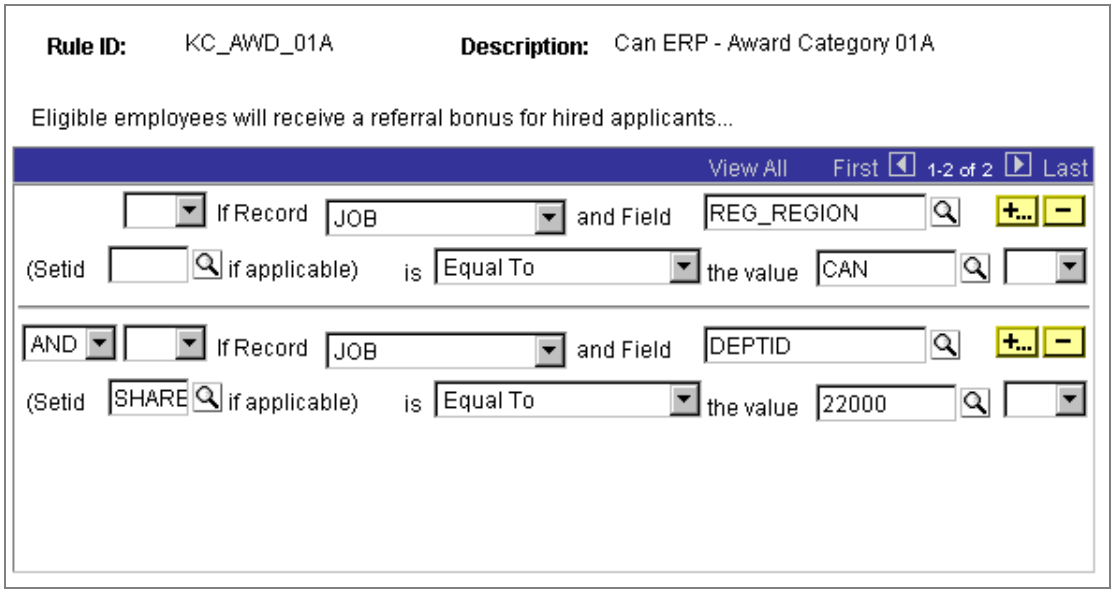
Creating Rule SQL

After you name and describe a rule, create the SQL for the rule. Create SQL on the following pages:

- Rule SQL page in the Employee Eligibility Rules component.
- Rule SQL page in the Award Category Rules component.
- Selection page in the Hot Jobs component.

The page for creating rule SQL is the same in all components, but the records and fields available for selection vary by component and the purpose of the rules varies.

Add as many rows as necessary and group lines with up to five open and close parentheses. The system checks for SQL errors when you save.



Example of a Rule SQL page

To construct a rule on the Rule SQL page:

1. Select open parentheses.

   You can select from zero to five open parentheses to group lines together as needed.

2. Select a record.

   The records available depend upon which component the page is in:

   - For employee eligibility rules the records are JOB and EMPLOYMENT.
   - For award category rules and hot job selection, the records are EMPLOYMENT, JOB, JOB_REQUISITION, and JOB_REQUIS_TYP.

3. Select a field from the selected record.

   The system limits the valid fields for the record in the drop-down list box.

4. Complete the **Setid** field, if SetID is a key for the record and field that you selected.

   The **Setid** field is unavailable if SetID is not a key.

5. Select an operand.

   The following are valid operands:

   - ***Equal To***
   - ***Greater Than***
   - ***Greater Than or Equal to***
   - ***LIKE***
   - ***Less Than***
   - ***Less Than or Equal To***
   - ***Not Equal To***

6. Enter a value that corresponds with the record, field, and operand that you selected.

   You can enter either a static string or select a value from a list of valid values for the field.

7. Select from zero to five close parentheses.

8. (Optional) Add a row to continue the rule definition.

   When you add a row, select the operand ***AND*** or ***OR*** in the first field in the new row.

9. Click the View SQL link to view the SQL generated by the values that you entered for this rule definition.

Setting Up Employee Referral Programs

The employee referral program administrator sets up employee referral programs.

Here are the basic steps:

1. Set up employee eligibility rules in the Employee Eligibility Rules component.
2. Set up award category rules and schedules in the Award Category Rules component.
3. Set up employee referral programs (ERP) in the Employee Referral Programs component.
4. Associate job requisitions with an employee referral program on the Recruitment Template page.

Pages Used to Set Up Employee Referral Programs

Page Name	*Object Name*	*Navigation*	*Usage*
Award Schedule	ER_RULE_AWD_SCH	Develop Workforce, Recruit Workforce (GBL), Setup, Award Category Rules, Award Schedule Develop Workforce, Recruit Workforce (GBL), Use, Hot Jobs, Award Schedule	Set up the amounts and timing of awards in the category. This page is also used to set up the amount and timing of awards in the hot job category.
Employee Referral Programs	ER_REF_PGM_PG	Develop Workforce, Recruit Workforce (GBL), Setup, Employee Referral Programs	Add or update a referral program ID, description, effective date, and some business rules.
Employee Referral Program – Criteria	ER_REF_PGM_CRT	Develop Workforce, Recruit Workforce (GBL), Setup, Employee Referral Programs, Criteria	Specify additional program criteria.
Employee Referral Programs- Rules	ER_REF_PGM_RUL	Develop Workforce, Recruit Workforce (GBL), Setup, Employee Referral Programs, Rules	Select the employee eligibility and award category rules that are in effect for the program.

See Also

Pages Used to Name Rules and Create SQL Statements

"Setting Up Recruit Workforce," Setting Up Recruitment Templates

Setting Up Employee Eligibility Rules

Eligibility rules define whether an employee qualifies for an award under the employee referral program. You can define various employee eligibility rules and link them to different referral programs or to different milestones within one program.

For example, you might create a rule that disqualifies all employees in the HR department from eligibility for employee referrals. You would apply that rule to disqualify an HR employee who refers a new applicant. You might not apply that rule to an employee who transfers to the HR department between the applicant's hire date and the award date.

Note. You do not have to create a rule stating that the applicant must have active employee status on the award date. This rule is already built into the system.

Use the Employee Eligibility Rules component to create eligibility rules:

1. Access the Employee Eligibility Rules page.

   Name and describe the rule.

2. Advance to the Rule SQL page.

   Create the SQL for the rule.

See Also

Naming and Describing Rules

Setting Up Award Category Rules

When you define the award category rules, you're defining the job requisitions that qualify for awards in the category and the amounts and timing of awards for the category. You can create any number of award categories, each with an award schedule. The job requisition that the applicant is hired into determines the award category for the referring employee's award.

We recommend that you set up your categories so that each requisition (for which you wish to have an ERP award) falls into only one category. Requisitions that do not fall into any category cannot be processed for employee referrals.

Use the Award Category Rules component to define award categories:

1. Access the Award Category Rules page.

   Name and describe the rule.

2. Advance to the Rule SQL page.

   Create the SQL for the rule.

3. Advance to the Award Schedule page.

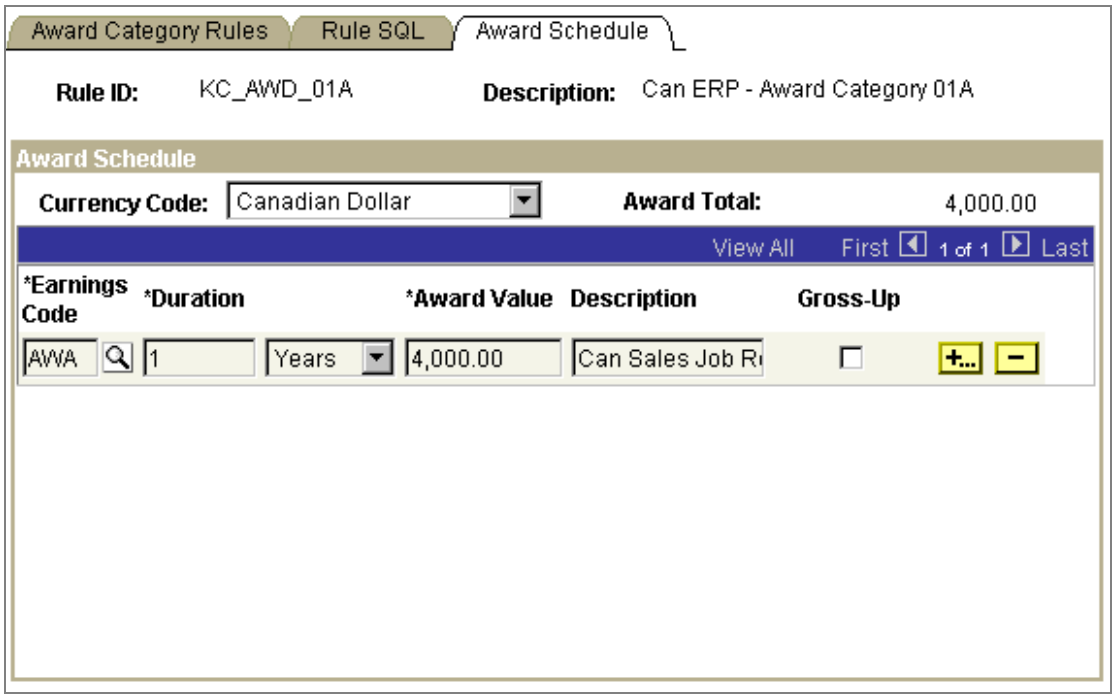
   Define the amounts, timing and earnings code for the rule.

See Also

Naming and Describing Rules

Setting Up Award Schedules

Access the Award Schedule page.



Award Schedule page

Currency Code Select the currency used to define awards in this category. Valid values are ***Canadian Dollar*** and ***US Dollar.*** You can override the currency on the Referral Award Details page or the Edit Awards page if the employee is paid in the other currency.

Award Total The total of all awards in the schedule. Click the refresh button to update the award total.

Earnings Code This field is visible only if PeopleSoft Payroll for North America is installed. Select the earnings code associated with the award. Valid values are the earnings codes that you set up on the Earnings Table.

Duration The number of ***Days, Months,*** or ***Years*** the employee must wait until the award is payable. Duration begins on the date the applicant is hired or rehired. The system calculates the award date from this information. (The award date is the date on which the duration requirement is fulfilled; it is not necessarily the date on which the award is paid.)

Award Value Enter the amount of a cash award or the value of a noncash award.

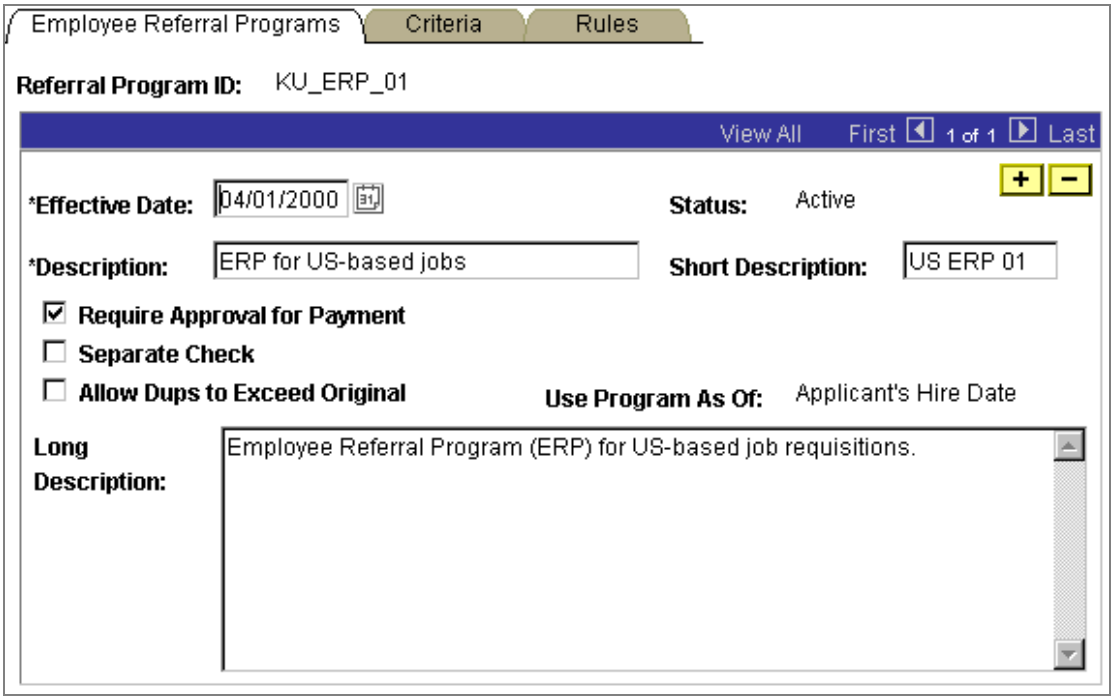
Gross-Up Select this if the award should be grossed up.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes"

Defining Employee Referral Programs

Access the Employee Referral Programs page.



Employee Referral Programs page

Effective Date Effective date works together with the **Use Program As Of** field in determining the rules in effect for a particular referral.

Require Approval for Payment If you do not select this check box, awards are automatically given *Approved* status when they are created.

If you select this check box, awards are automatically given *Needs Approval* status when they are created and must be manually approved on the Referral Award Approval page.

Only awards that have *Approved* status can be submitted for payment.

Separate Check Select this check box if you want the award paid separately from the employee's regular paycheck.

If you're paying awards through PeopleSoft Payroll for

	North America, all grossed up awards are paid by separate check.
Allow Dups to Exceed Original (allow duplicates to exceed original)	Select this check box if you allow the total of awards to exceed the original award amount when split among several referring employees.
Use Program As Of	Select which effective-dated program rules apply to the referral. Valid values are ***Referral Date*** and ***Applicant's Hire Date.*** The system applies *all* program rules that are in the effective-dated row that is active as of the **Use Program As Of** date. This field is available only when you add a new program. After you define a program, you cannot change this value in subsequent effective-dated rows.

See Also

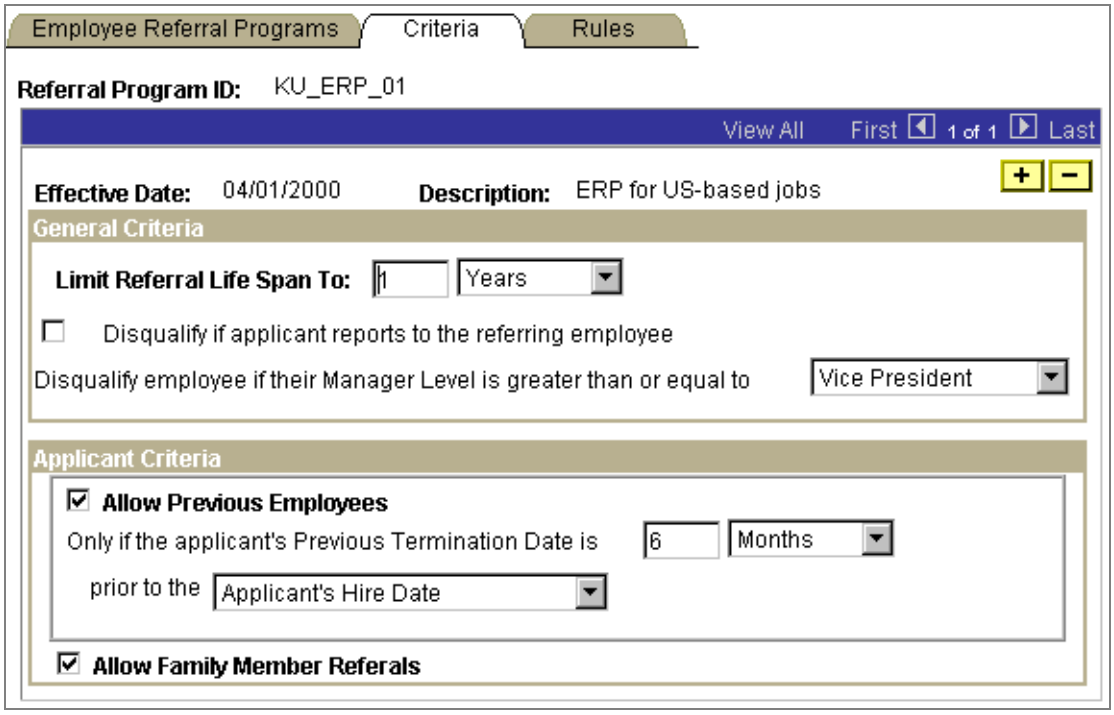
ERP Effective Dates

Viewing and Overriding Duplicate Referrals

Approving Awards

Setting Up Employee Referral Program Criteria

Access the Employee Referral Program - Criteria page.



Employee Referral Program - Criteria page

General Criteria

Limit Referral Life Span To The system uses the value that you enter here to determine whether the employee's referral is active at the time the applicant is hired. Each time the employee refers the same applicant, the life span begins again.

The system calculates life span in calendar days.

Enter ***0*** to continue the life span of referrals indefinitely.

Disqualify if applicant reports to the referring employee The PeopleSoft Human Resources Department Tree structure must be set up if you use this rule. If you select this check box, the system disqualifies employees if the applicant reports to them directly or indirectly based on the tree structure as of the applicant's hire date.

Disqualify employee if their Manager Level is greater than or equal to The PeopleSoft Human Resources department tree structure must be set up if you use this rule. Select the lowest level of manager that is disqualified from the employee referral program.

To make all levels of employees eligible, select ***All Other Positions.***

The system evaluates employee levels as of the applicant's hire date.

Applicant Criteria

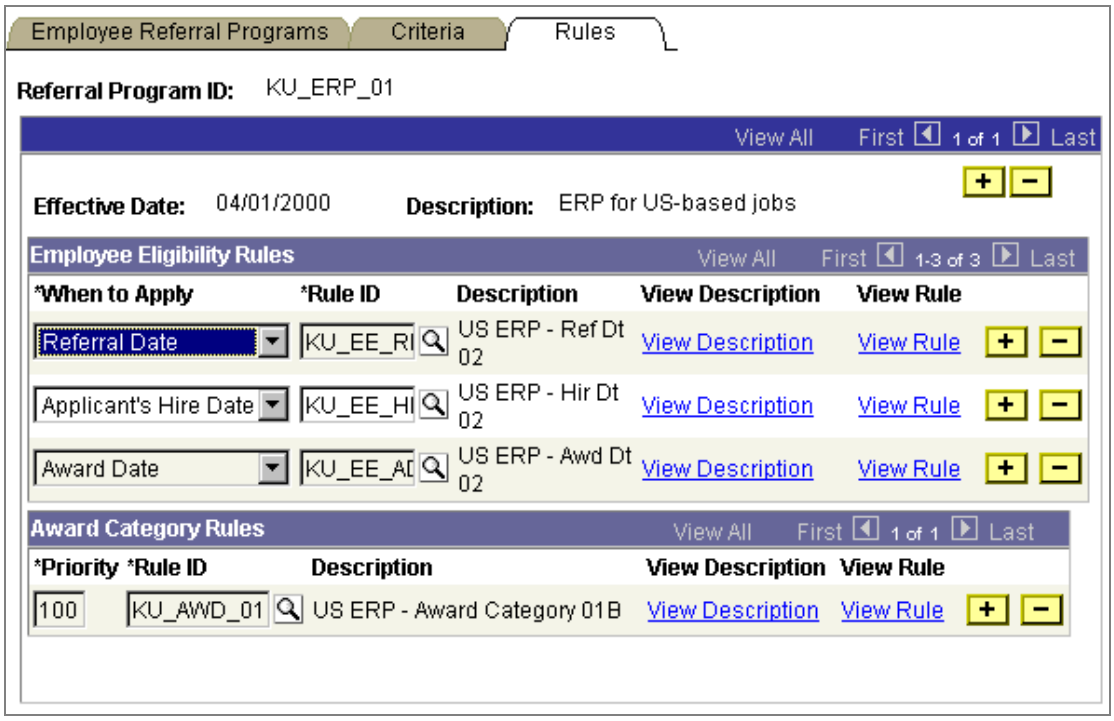
Allow Previous Employees Select this check box if you allow employee referrals of applicants who are previous employees. Complete the other fields defining how long the applicant must have been away from your organization. Enter ***0*** to allow all previous employees to be referred.

The system evaluates this criteria based on information provided in the Refer a Friend or Apply for Job self-service transactions or the information entered in the Applicant Data component by the administrator. It does not check the organization's historical records.

Allow Family Member Referrals Select this check box if you allow employees to refer members of their family.

Selecting Employee Eligibility and Award Category Rules

Access the Employee Referral Program - Rules page.



Employee Referral Program - Rules page

View Description Click this link to view a long description of the rule.

View Rule Click this link to access the component where you defined the rule. Use your browser's back button to return to the ERP Rules page.

Employee Eligibility Rules

When to Apply This field allows you to apply different employee eligibility rules at different points in the referral process.

For example, you might want to apply strict employee eligibility rules at the time the applicant is hired, but on the award date, you might only require that the employee have active status.

Select when to apply each employee eligibility rule that you associate with this program. You can select each of the three values only once for a maximum of three rows. Valid values are ***Referral Date, Applicant's Hire Date,*** and ***Award Date.*** The system uses the rule that you associate with the award date to check eligibility before paying any award in the award category award schedule or in a hot job award schedule.

Rule ID Select the rule that you want to apply. Valid values are the rules you set up in the Employee Eligibility Rules component.

Award Category Rules

Priority

Enter an integer in this field to tell the system in what order to process the award category rules. The system checks the requisition that the applicant is hired into against the category rules in the priority order. As soon as it finds the requisition in a category, it stops processing that requisition and applies the award schedule for that category.

We recommend that you make the award category rules mutually exclusive so that a job requisition does not fall into multiple categories.

The system does contain safeguards against paying an employee in multiple award categories for the same applicant.

If a requisition does not fall into any award category, no awards will be scheduled or paid.

Rule ID

Select the rule you want to apply. Valid values are the rules you set up in the Award Category Rules component. You can assign as many rules to the program as you want, each with a unique priority number. Do not select the same rule more than once.

See Also

Naming and Describing Rules

Creating Rule SQL

Understanding Eligibility Processing

Understanding Awards Processing

ERP Effective Dates

Setting Up and Reviewing Hot Jobs

Associating Job Requisitions with Employee Referral Programs

After you create your employee referral programs, you must associate job requisitions with the ERPs. Make the association on the templates used for setting up job requisition defaults. The purpose is to limit system processing to the rules associated with the ERP that is valid for the requisition the applicant is hired into.

The association with an ERP is not visible to the hiring managers or approving managers who create the requisition; it is for processing purposes only.

1. Access the Recruitment Template page.

2. Select the employee referral program ID in the Employee Referral Program field.

See Also

"Setting Up Recruit Workforce," Setting Up Recruitment Templates

Setting Up and Reviewing Hot Jobs

You can set up hot job categories with award schedules and select requisitions into each hot job category. Here are some facts about hot job categories:

- The administration of hot jobs occurs independently of any ERP.

  The hot job category is like an award category, but you associate the hot job category directly with job requisitions rather than with an ERP. The hot job category is applied against the requisition that the applicant is hired into.

- Hot job awards override ERP awards.

- Hot jobs do not override any ERP eligibility criteria. Hot job awards are paid only if the referral satisfies the ERP's employee eligibility criteria.

- The system checks eligibility by the *rules* of the ERP, but by the *schedule* of the hot job category.

  For example, suppose an ERP pays awards six months after an applicant is hired and the hot job award is paid three months after, then eligibility is checked at the three month point but not at the six month point.

- Hot jobs are not effective-dated.

  Once requisitions are marked as hot jobs, they remain hot jobs until you remove them from the list. Similarly, newly created job requisitions that may meet the criteria to be a hot job are not automatically marked as a hot job. You must run the selection process before any job requisitions can be added to or removed from the hot job list.

Summary of Setting Up and Administering Hot Jobs

Here's how you set up and review hot jobs using the Hot Job component:

1. Name and describe a hot job category on the Hot Jobs page.
2. Define criteria for selecting requisitions as hot jobs on the Selection page.
3. Run the online process to create a list of qualifying requisitions by clicking the button on the Selection page.
4. Remove selected requisitions from the hot job category on the Job Requisitions page.
5. Set up the amounts and timing of awards in the hot job category on the Award Schedule page.

6. View the history of a requisition's hot job status on the Hot Job History page.

Pages Used to Set Up and Review Hot Jobs

Page Name	*Object Name*	*Navigation*	*Usage*
Job Requisitions	ER_RULE_HOTJOB	Develop Workforce, Recruit Workforce (GBL), Use, Hot Jobs, Job Requisitions	Select requisitions and remove them from the hot job category.
Hot Job History	ER_HOTJOB_HIST	Develop Workforce, Recruit Workforce (GBL), Inquire, Hot Job History	View the history of a requisition's hot job status.

The Hot Jobs component also includes the same Awards Schedule page that appears in the Employee Referral Program component.

See Also

Setting Up Rules

Setting Up Employee Referral Programs

Setting Up Hot Job Award Schedules

Defining Hot Jobs

Here's how you define a hot job:

1. Access the Hot Jobs page.

   Add a new Hot Job ID to access the page when you're creating a new hot job category.

2. Provide the description, short description, and long description of the Hot Job ID.

Defining Selection Criteria for the Hot Job

The Selection page is identical to the Rule SQL page used to set up award category rules with the addition of a Select Hot Jobs button.

1. Access the Selection page.
2. Define criteria for selecting job requisitions as hot jobs in this Hot Job category.
3. Click the Select Hot Jobs button to load qualifying requisitions into the Job Requisitions page.

The system does not list requisitions that have already been selected into another hot job category.

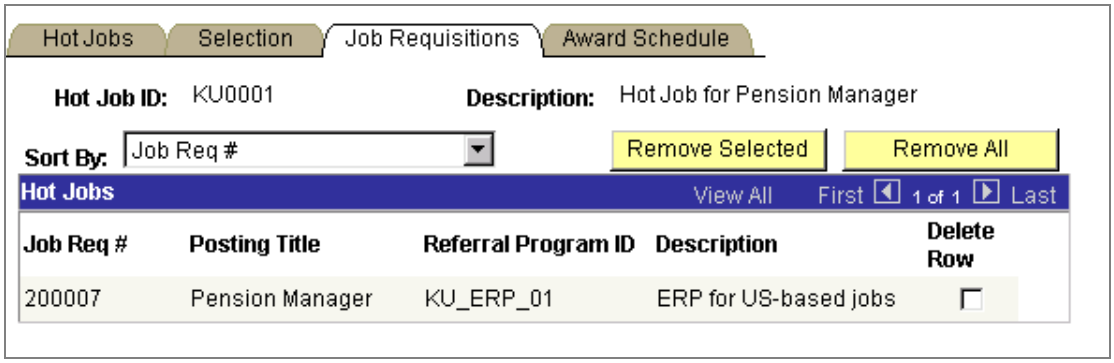
If you previously created a list of requisitions for this hot job category, the system reapplies the criteria and any requisition that no longer qualifies does not appear on the list. For example, if *Open* status is a criterion, a job that now has *Reopen* status does not appear on the list.

See Also

Creating Rule SQL

Refining Job Requisition Selection

Access the Job Requisitions page.



Job Requisitions page

Sort By You can sort by job requisition number, job requisition description, referral program description, or referral program ID.

Remove Selected Click this button to remove requisitions that you have selected in the **Delete Row** check box. The requisitions are removed when you save.

Remove All Click this button to remove all requisitions from the list. The requisitions are removed when you save.

Hot Jobs

Referral Program ID If you have associated the requisition with an ERP, the system enters the ERP ID here. If the requisition is not associated with an ERP, select one here. You must associate a requisition with an ERP; otherwise, the system cannot determine employees' eligibility for awards.

Setting Up Hot Job Award Schedules

The hot job award schedule supercedes the award schedule associated with the requisition through the ERP award category rules. There is no safeguard in the system against creating hot job awards of less value than in the ERP award category. Therefore, you must use caution when setting up hot job awards.

1. Access the Award Schedule page in the Hot Job component.
2. Define the award schedule.

This page is the same as the Award Schedule page in the Award Category Rules component.

See Also

Setting Up Award Schedules

Processing Eligibility and Awards

When you set up ERPs, you capture time-sensitive rules that dictate eligibility and awards for each referral under the particular ERP. The Eligibility and Awards process applies these time-sensitive rules at the appropriate times in a referral's life span.

It is necessary to establish which ERP a referral is associated with before eligibility and awards can be determined. This association occurs only when an applicant is hired and is determined by the ERP associated with the job requisition template. Therefore, eligibility and awards cannot be determined before an applicant is hired.

The Eligibility and Awards process is actually two processes in one:

- Eligibility processing determines whether the referring employee is eligible for ERP awards.
- Awards processing determines the amount and timing of awards.

You can run the Eligibility and Awards process for a specified ERP or for all ERPs.

Understanding Eligibility Processing

The Eligibility and Awards process checks employee eligibility according to the rules and criteria set up in the ERP for the following three dates:

- Referral date.
- Hire date.
- Award date.

You associate rules with these dates using the When to Apply field on the Employee Referral Program - Rules page. Criteria apply at various times depending on the particular criteria or on how you set up the program. The following table shows the dates for which the rules and criteria are processed:

Rule or Criterion	*Referral Date*	*Hire Date*	*Award Date*
Employee Eligibility Rule	Determined by the When to Apply value on the Rules page.	Determined by the When to Apply value on the Rules page.	Determined by the When to Apply value on the Rules page.
Award Category Rules		Applies	
Referral Life Span criteria		Applies (Checks the referral life span against the time elapsed between the referral and hire dates.)	
Is the employee a direct or indirect manager of the hired applicant? (criteria)		Applies if selected on the Criteria page.	
Manager level criteria		Applies	
Previous employee criteria	May apply, depending on whether selected and the "prior to" value in the criteria setup.	May apply, depending on whether selected and the "prior to" value in the criteria setup.	
Family member referral criteria		Applies if selected on the Criteria page.	
Applicant must be actively employed		Applies	Applies

When Eligibility is Not Recalculated

The process does not recalculate eligibility for every referral in an ERP every time it runs. It does not process or reprocess eligibility under the following conditions:

- The applicant has not been hired.
- The referral has been processed and marked *Ineligible*.
- The referral was processed and marked *Eligible* as of the hire date, but the award date has not been reached when the process runs again.
- The eligibility status has been overridden and not marked as a re-process.

Reprocessing Eligibility for Duplicate Applicants

Duplicate applicant records can result in erroneous ERP eligibility results after applicant data is merged. Before the duplicate applicant records are merged, there can be multiple distinct applicant records and multiple distinct referral records all for the same applicant. After

merging, there is only one applicant record, but PeopleSoft maintains multiple referral records. You must run the Eligibility and Awards process again to make sure eligibility status is correct, because the original results were based on an unmerged data set. You can override eligibility on the Referral Administration component and rerun the eligibility process, if necessary.

You can distribute the referral award among multiple eligible employees on the Review Duplicate Referrals page.

See Also

Selecting Employee Eligibility and Award Category Rules

"Managing Applicants" Merging Duplicate Applicant Records

Viewing and Overriding Duplicate Referrals

Understanding Awards Processing

After checking eligibility, the process begins award processing if the referral meets both of the following conditions for a particular ERP:

- Applicant is hired.
- Employee is eligible as of the referral date (if any rules apply) and as of the applicant's hire date.

Following is the sequence of award processing:

1. Checks the job requisition that the applicant was hired into against the ERP's award category rules.

   a. If the requisition *is not* in any of the award categories, the process:

      Sets eligibility status to Ineligible.

      Issues a message that the requisition is not covered by the ERP.

   b. If the requisition *is* in an award category, the process schedules awards.

      The first award category rule satisfied by the job requisition determines the schedule.

2. Checks hot jobs.

   If the requisition is a hot job, the hot job award schedule overrides the award schedule of the ERP award category rule.

Understanding Payment Status

The following table explains the values that you might see in the Payment Status field when viewing ERP award data. Unless otherwise specified, "payroll" refers to PeopleSoft Payroll for North America only.

Payment Status	*Description*	*Process that Writes Status*
Approved - Goes to Payroll (AP)	Approved award that has not yet been submitted for payment.	• Entered by the Eligibility and Awards process if Require Approval for Payment is not selected on the Employee Referral Programs setup page. • Manually entered on the Referral Award Approval page or the Referral Award Details page if Require Approval for Payment is selected on the Employee Referral Programs setup page or after correcting rejected awards.
Needs Approval (NA)	The ERP requires approval of awards and this award has not yet been approved.	• Entered by the Eligibility and Awards process if Require Approval for Payment is selected on the Employee Referral Programs setup page. • Manually entered on the Referral Award Approval page if a non-approver corrects rejected awards.
Cancelled (CN)	Plan administrator cancels an award.	Manually entered on the Referral Award Details page.
Sent to Payroll (SP)	Awards have been published to PeopleSoft Payroll for North America.	Interface to Payroll for North America process.
Taken by Payroll (TP)	Payroll confirms receipt of award.	Interface to Payroll for North America process.
Paid (PD)	Payroll has paid award.	Interface to Payroll for North America process.
Rejected by Payroll (RP)	Payroll rejects award payment. (Typically due to erroneous data.)	Interface to Payroll for North America process.
Reversed by Payroll (RV)	Payroll reverses award payment. (Typically due to an employee being incorrectly paid.)	Interface to Payroll for North America process.

See Also

Paying Awards

Page Used to Process Eligibility and Awards

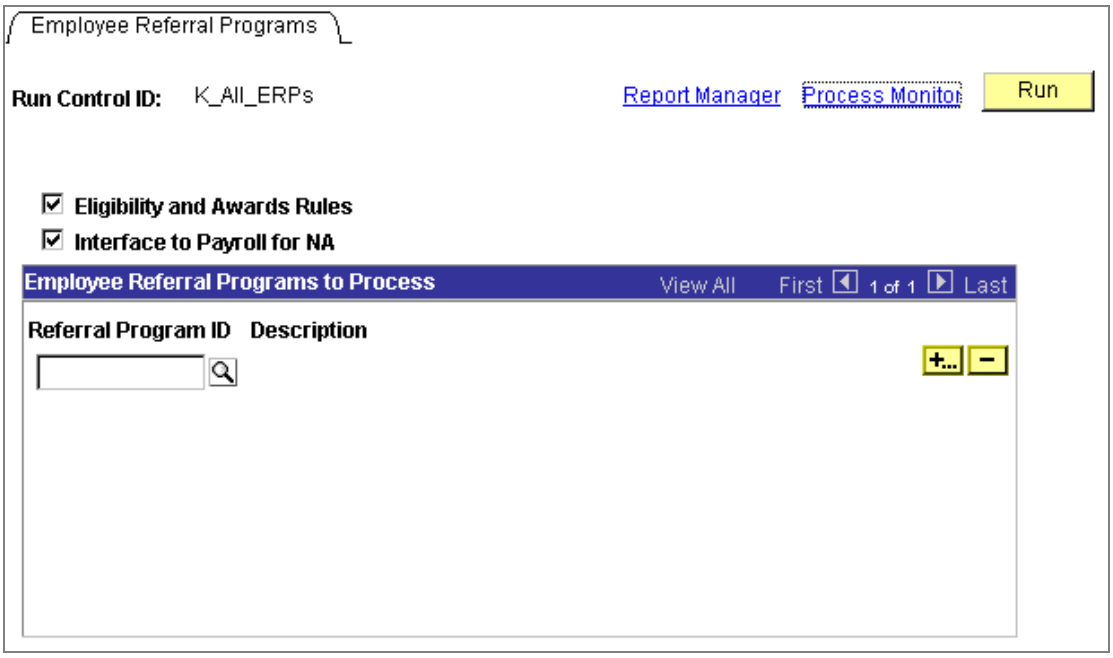
Page Name	*Object Name*	*Navigation*	*Usage*
Employee Referral Programs	RUNCNTL_ERP	Develop Workforce, Recruit Workforce (GBL), Process, Employee Referral Programs	Run the process to evaluate and update eligibility status and award status. Run the process to submit awards to PeopleSoft Payroll for North America.

See Also

Using the Interface to Payroll for North America Process

Running the Eligibility and Awards process

Access the Employee Referral Programs page.



Employee Referral Programs page

Eligibility and Awards Rules	Select this check box to process eligibility and create awards. This selection does not send awards to payroll.
Interface to Payroll for NA (interface to payroll for North America)	Select this check box to process award payments through PeopleSoft Payroll for North America.
Referral Program ID	Select the ERPs that you want to process. You can add rows as necessary. If you do not select an ERP, the process runs for all ERPs.

See Also

Using the Interface to Payroll for North America Process

Viewing and Overriding Referral Awards

Here's how you manage referral overrides:

- View and override eligibility and award information for referrals. Use the Referral Administration component.
- View duplicate referrals and adjust award amounts among eligible employees if desired.

  Sometimes the same applicant is referred by more than one employee. The system selects just the first eligible employee for awards. If your organization honors duplicate referrals, you can use the Review Duplicate Referrals page to:

  - Detect situations where the same applicant is referred by more than one employee.
  - Override the award amounts for the referring employees.
- View an audit list of manual overrides, including who made the change, when the change was made, and details of the change. Use the Override Audit component.

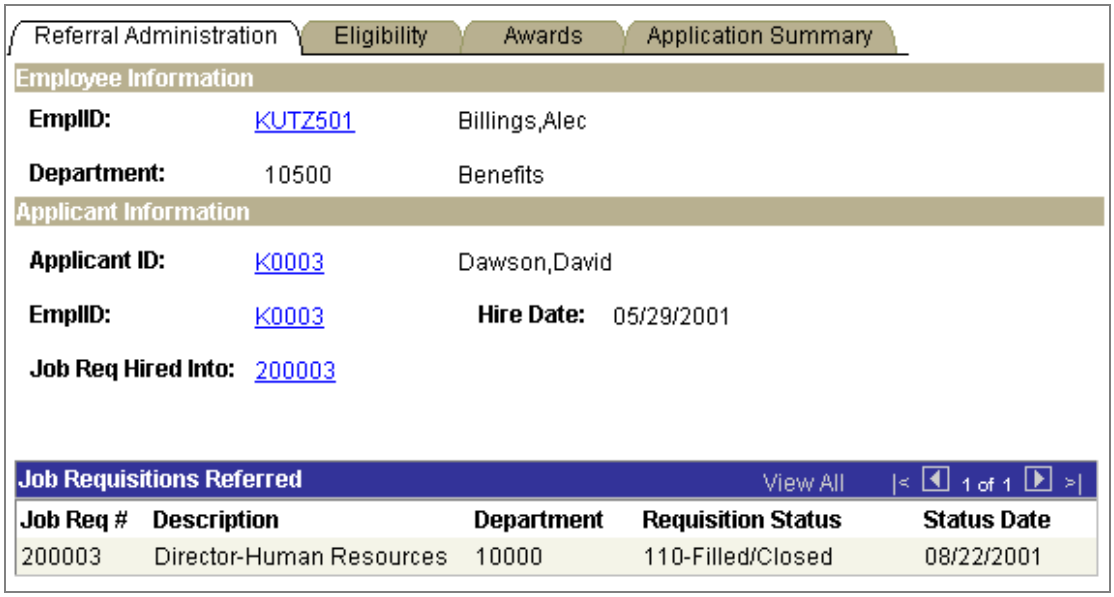
Pages Used to View and Override Referrals

Page Name	*Object Name*	*Navigation*	*Usage*
Referral Administration	ER_REF_ADMN_MAIN	Develop Workforce, Recruit Workforce (GBL), Use, Referral Administration	View summary information about a referral.

Page Name	*Object Name*	*Navigation*	*Usage*
Referral Administration - Eligibility	ER_REF_ADMN_ELIG	Develop Workforce, Recruit Workforce (GBL), Use, Referral Administration, Eligibility	View and Override employee eligibility.
Referral Administration - Awards	ER_REF_ADMN_AWD	Develop Workforce, Recruit Workforce (GBL), Use, Referral Administration, Awards	View award status.
Referral Award Details	ER_EE_REF_AWD_OVR	Click the Details link on the Awards page.	View and override details of the award.
Referral Administration - Application Summary	ER_REF_ADMN_APPDT	Develop Workforce, Recruit Workforce (GBL), Use, Referral Administration, Application Summary	View eligibility by application.
Review Duplicate Referrals	ER_DUP_REFERRAL	Develop Workforce, Recruit Workforce (GBL), Use, Duplicate Referrals	Identify duplicate employee referrals and split awards.
Eligibility Overrides	ER_AUDIT_OVR_ELIG	Develop Workforce, Recruit Workforce (GBL), Inquire, Override Audit	View the audit details of manual overrides to eligibility data. You can select overrides by applicant, by employee, or by the administrator who overrode the audited field. Only referrals that contain audit information are available in the search.
Award Overrides	ER_AUDIT_OVR_AWD	Develop Workforce, Recruit Workforce (GBL), Inquire, Override Audit	View the audit details of manual overrides to award data.

Viewing Referral Summary Information

Access the Referral Administration page.



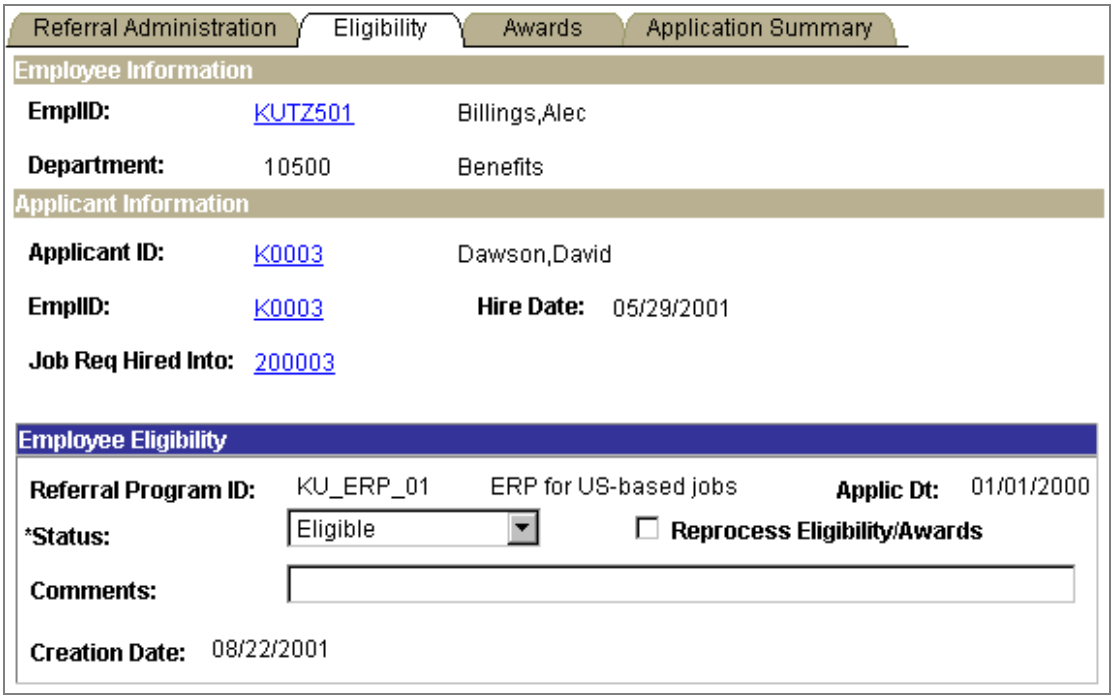
Referral Administration page

This view-only page provides information about the employee, the applicant, and the referred job requisitions.

EmplID	Click to view the employee's job data.
Applicant ID	Click to view the applicant's resume.
Job Req Hired Into (job requisition hired into)	Click to view the job data of the applicant who has become an employee.

Viewing and Overriding Employee Eligibility

Access the Referral Administration - Eligibility page.



Referral Administration - Eligibility page

Employee Eligibility

The system displays a row of eligibility data for each application of eligibility rules defined by the When to Apply field on the Employee Referral Program - Rules page.

If the applicant has not been hired, the system issues the following message: “Eligibility has not yet been determined” in place of the fields in the **Employee Eligibility** group box.

Applic Dt (application date) — The date of the earliest application with eligible status that is associated with the referral. If there is no application date with eligible status, the earliest application date is the referral date.

Status — The current employee eligibility status. Values are ***Eligible*** and ***Ineligible.***

You can override the ***Eligible*** status only if the award has not been submitted for payment.

If you manually change the status from ***Ineligible*** to ***Eligible,*** the system does not reprocess eligibility rules that are evaluated as of the referral date or hire date.

Reprocess Eligibility/Awards — Select this check box if you want to rerun all eligibility and awards processing the next time the Eligibility and Awards process runs.

Comments — The system prints a comment here that explains the reason for the eligibility status. If you manually change the status, the system enters the comment “Manual override

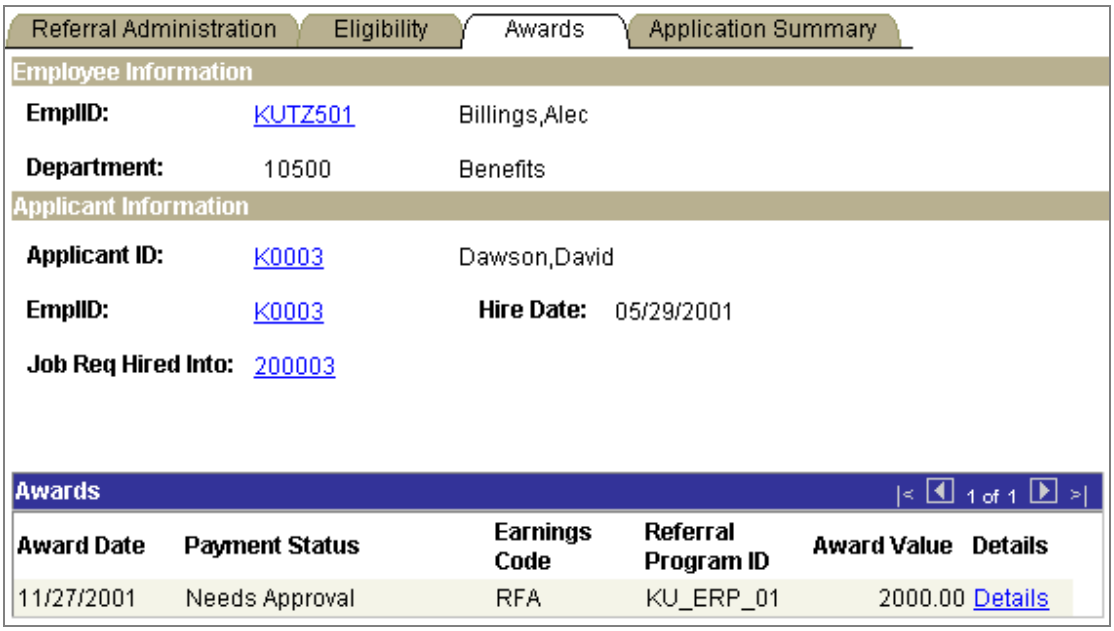
	by administrator." You can view details of a manual override on the Eligibility Overrides page. You can manually enter a comment that supercedes the system-generated comment.
Creation Date	The date the eligibility status was originally determined by the system.
Event Type	The system categorizes the rule or criteria that causes the ineligibility status. The valid values are: ***General Eligibility Criteria:*** Any of the criteria defined on the Employee Referral Program - Criteria page. ***Referral Eligibility Rule:*** Eligibility rule associated with the referral date in the When to Apply field on the Employee Referral Program - Rules page. ***Hire Eligibility Rule:*** Eligibility rule associated with the applicant's hire date in the When to Apply field on the Employee Referral Program - Rules page. ***Award Eligibility Rule:*** Eligibility rule associated with the award date in the When to Apply field on the Employee Referral Program - Rules page. ***Manual Override:*** Manual change on this page.
Event Date	The system enters the date that the eligibility status was last changed.

See Also

Understanding Eligibility Processing

Viewing Awards

Access the Referral Administration - Awards page.



Referral Administration - Awards page

Award Date The system calculates this date according to the duration in the award schedule.

Award Value Determined by the award schedule of the award category.

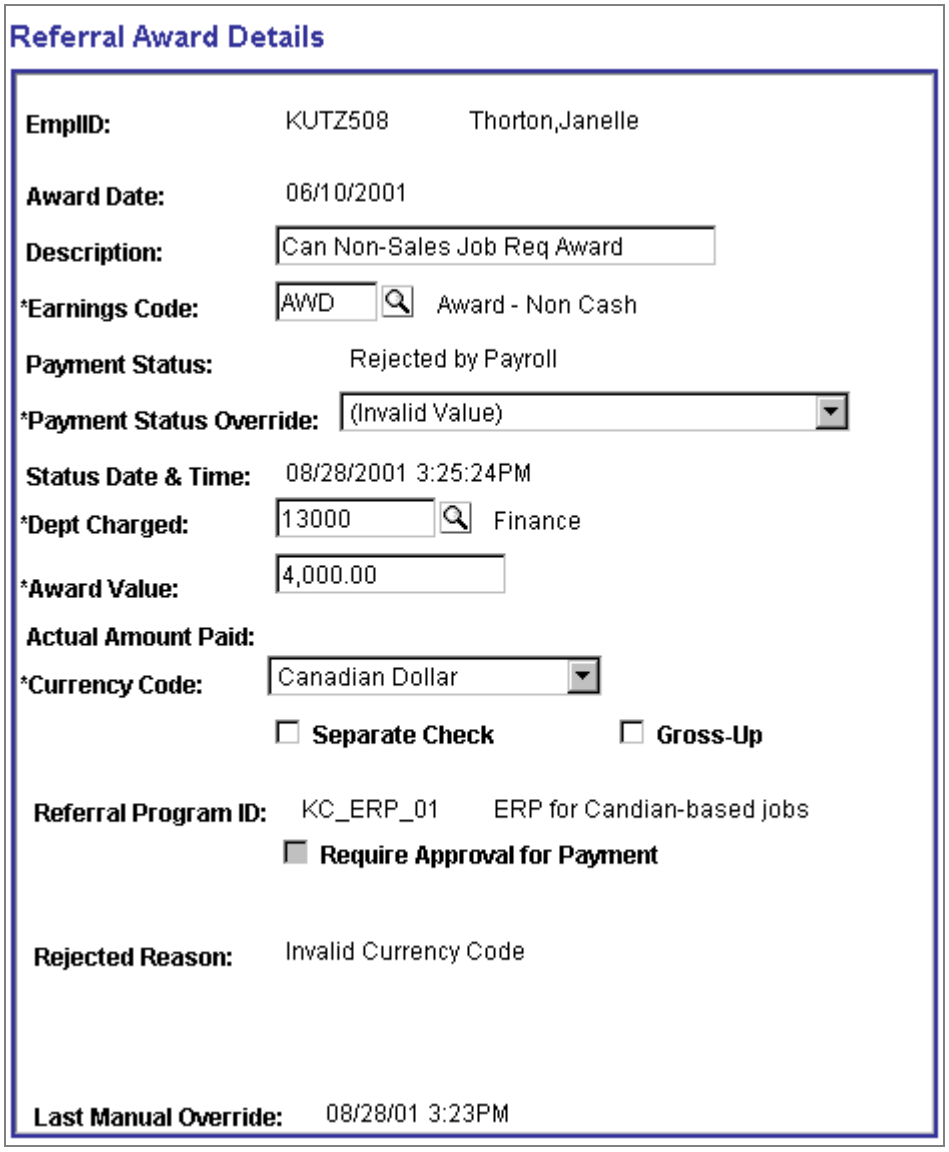
Details Click this link to access the Referral Award Details page.

See Also

Understanding Payment Status

Overriding Award Details

Access the Referral Award Details page.



Referral Award Details page

Much of the data on this page reflects the rules and criteria set up for the ERP. You can override the value in any editable field.

Award Date This date is calculated according to the duration in the award schedule.

Description The duration that you specified for the award on the Award Schedule page.

Payment Status Override Use this field to manually approve an award that has ***Needs Approval*** status. You can only do this if the eligibility status is ***Eligible.***

The ERP administrator can manually change the payment status to or from ***Needs Approval, Approved,*** or ***Cancelled.***

	You cannot manually override the status of an award that is submitted to be paid, unless PeopleSoft Payroll for North America has rejected it. If an award has been rejected by PeopleSoft Payroll for North America, the ERP administrator can change a ***Rejected by Payroll*** or ***Reversed by Payroll*** status to: ***Cancelled:*** You accept the reason for the rejection and do not intend to correct it. ***Needs approval:*** You corrected the reason for the rejection and now the award is ready to be approved again. ***Approved:*** You corrected the reason for the rejection and now the award is ready to be submitted when the process runs again for the ERP.
Dept Charged (department charged)	The default is the department (of the job requisition) into which the applicant was hired.
Award Value	The amount of the award as defined in the award schedule. The currency defined for the award schedule also appears.
Actual Amount Paid	This value is entered when the award is paid through PeopleSoft Payroll for North America.
Currency Code	This is the currency in which the award is paid to the employee.
Separate Check	Select this check box to override the default that you set up on the Employee Referral Programs page.
Gross-Up	Select this check box to override the default that you set up on the Award Schedule page. If you select Gross-Up and use PeopleSoft Payroll for North America, the award is paid by separate check.
Require Approval for Payment	Set the value for this field on the Employee Referral Program page. You cannot change it here.
Rejected Reason	The reason that PeopleSoft Payroll for North America rejected the award.
Last Manual Override	The system enters the date of the last manual override. You can view details of the override on the Award Overrides page.

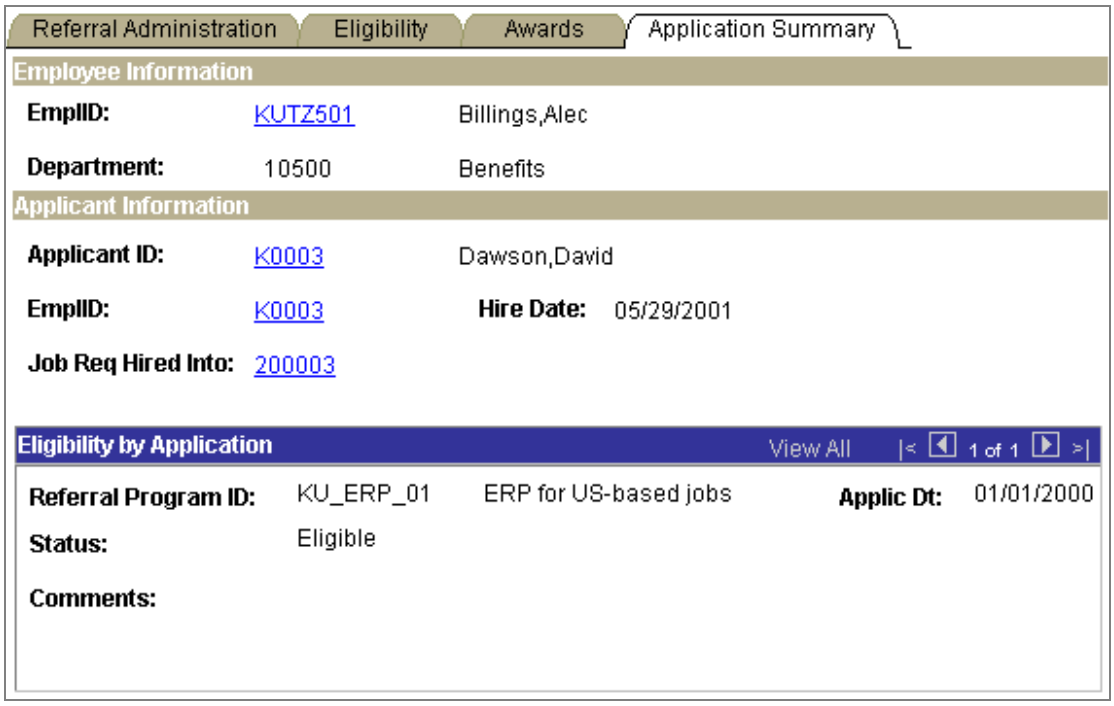
See Also

Understanding Payment Status

Viewing Awards Rejected by PeopleSoft Payroll for North America

Viewing Eligibility by Application

Access the Referral Administration - Application Summary page.



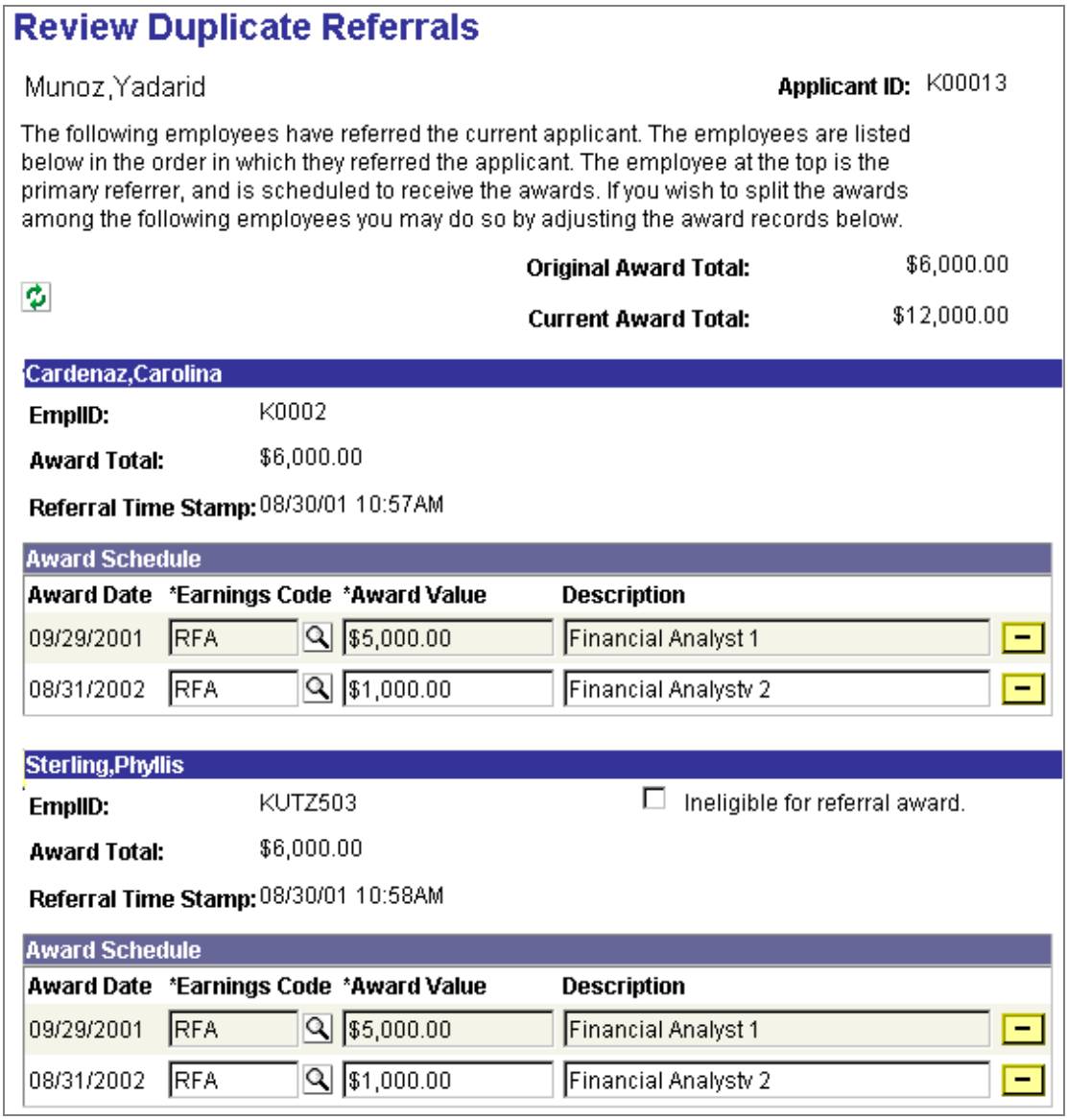
Referral Administration - Application Summary page

This page shows all the dates that the employee referred the applicant and the employee's eligibility status for each referral. Remember that eligibility for award payment is determined by the job requisition into which the applicant is hired.

Comment The system provides the reason for ineligible status only.

Viewing and Overriding Duplicate Referrals

Access the Review Duplicate Referrals page.



Review Duplicate Referral page

The page lists eligible employees in the order in which they referred the applicant. The award schedule and amounts are listed for the first employee only. You can divide the amounts among some or all of the referring employees.

The total award for all employees can be more than the original award if you selected Allow Dups to Exceed Original on the Criteria page when setting up the ERP.

Original Award Total The total value of all awards in the original award schedule awarded to the first employee.

Current Award Total The total of all awards entered on the page for all the referring employees.

Click this button to refresh the **Current Award Total** field.

Award Value Adjust the award amount for each employee.

Approving Awards

When you set up the ERP, define whether or not awards require approval before payment. If approval is required, the Eligibility and Awards process gives awards the *Needs Approval* payment status, and you must manually approve them.

You can manually approve awards on one of the following pages:

- Use the Referral Award Approval page to quickly approve all or selected awards in the ERP when the payment status is *Needs Approval*.
- Use the Rejected Awards page to correct and approve awards when the payment status is *Rejected by Payroll*.
- Use the Award Details Override page in the Referral Administration component to override award details and approve the award when the payment status is other than *Needs Approval* or *Rejected by Payroll*.

Page Used to Approve Awards

Page Name	*Object Name*	*Navigation*	*Usage*
Referral Award Approval	ER_MASS_APPROVE	Develop Workforce, Recruit Workforce (GBL), Use, Referral Award Approval	View and approve awards that have the status of *Needs Approval*.

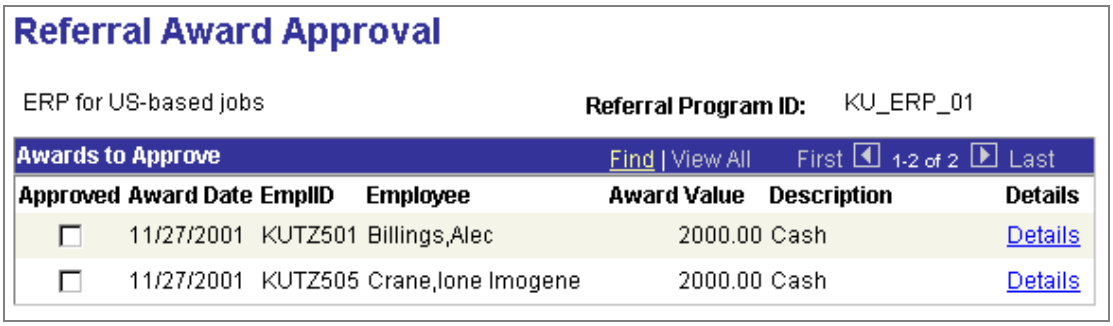
See Also

Overriding Award Details

Editing Rejected Awards

Approving Referral Awards with Needs Approval Status

Access the Referral Award Approval page.



Referral Award Approval page

For the selected ERP, the page lists all awards that have the *Needs Approval* payment status.

Approved Select this check box to approve individual awards in the list.

Select All Click to select the Approved check box for all awards in the list, including those outside the view area.

Details Click the link to view details of the award before approving.

Note. You must save the page to approve the awards. Once awards are approved, they do not appear on this page again.

See Also

Understanding Payment Status

Paying Awards

The interface between employee referral programs and payroll processing depends upon the payroll system used to pay the referring employee.

PeopleSoft Payroll for North America

If the employee is paid through PeopleSoft Payroll for North America, use the Interface to Payroll for North America process to publish the monetary and non-stock, non-monetary awards directly to PeopleSoft Payroll for North America using PeopleSoft Application Messaging.

Other Payroll Systems

If the employee is not paid through PeopleSoft Payroll for North America, you can create your own interface to your payroll system.

Understanding Integration With PeopleSoft Payroll for North America

The following table outlines the award payout integration between employee referral programs and PeopleSoft Payroll for North America (payroll):

Integration Step	*Description*
Employee referral program publishes a payment request for approved awards to payroll.	Publishes the award amount in the currency of the award category. Sets the award's payment status to *Sent to Payroll*.
Payroll subscribes to the payment request, which automatically runs a PeopleSoft Application Engine process to validate or reject the award data and publishes an acknowledgement of acceptance or rejection.	Subscription inserts the awards into a subscribing staging table. Validation checks for error conditions that require correction prior to loading to paysheet. If award data are valid, the system inserts the awards into the application table and publishes an acknowledgement that sets the award's payment status to *Taken by Payroll*. If errors are detected, the system publishes an acknowledgment that sets the award's payment status to *Rejected by Payroll* and supplies a reason code.
Employee referral program subscribes to the acknowledgement of rejected or awards with errors.	ERP administrator uses the Rejected Awards page to view the reason for rejection and to correct the award data.
Payroll processes validated awards and issues checks.	Payroll creates paysheets, calculates gross up amounts and taxes, confirms pay, issues checks, and posts amounts to General Ledger (GL).
Payroll runs a PeopleSoft Application Engine process to publish a notification of payment.	This process runs after payments are calculated and confirmed.
Employee referral program subscribes to the notification of payment.	The subscription updates the award's payment status to *Paid* or *Reversed by Payroll* and updates the Status Date and Time, Actual Amount Paid, Paycheck Status, Paycheck Number, and Check Date.

Enterprise Integration Points Related to Integration Between Employee Referral Programs and PeopleSoft Payroll for North America

The system uses the following application messages to transfer awards and payout data between employee referral programs and PeopleSoft Payroll for North America (payroll).

EIP Name	*Message Name*	*Message Definition*
ERECRUIT REQUEST FOR PAYMENT	PAYMENT_ERECRUIT_REQUEST	Employee referral programs publish award data to payroll and payroll subscribes to the award data.

EIP Name	Message Name	Message Definition
ACKNOWLEDGMENT/VERIFICATION OF ERECRUIT PAYMENT	PAYMENT_ERECRUIT_ACKNOWLEDGE	Payroll validates the requested awards and publishes the results of validation. Employee referral programs subscribe to the acknowledgement.
PAYROLL ISSUED ERECRUIT PAYMENT	PAYMENT_ERECRUIT_ISSUED	Payroll publishes notification of payment and employee referral programs subscribe to the notification.

Activating Enterprise Integration Point Messages and Channels

All enterprise integration point (EIP) messages are delivered inactive. In PeopleSoft Application Designer, you must activate the PAYMENT_ERECRUIT_REQUEST, PAYMENT_ERECRUIT_ACKNOWLEDGE, and PAYMENT_ERECRUIT_ISSUED messages. Set the status of each selected message to *Active,* and set the status of the corresponding message channel to *Run.*

See Also

Understanding Payment Status

EIP Catalog database on the Customer Connection website under Open Integration Framework in the Documentation section.

PeopleTools PeopleBook: PeopleSoft Application Messaging

Page Used to Pay Awards Through PeopleSoft Payroll for North America

Page Name	Object Name	Navigation	Usage
Rejected Awards	ER_REJECTED_AWDS	Develop Workforce, Recruit Workforce (GBL), Use, Rejected Awards	View awards that are rejected by PeopleSoft Payroll for North America. Access the Referral Award Details page where you can correct rejected awards.

See Also

Page Used to Process Eligibility and Awards

Using the Interface to Payroll for North America Process

The Interface to Payroll for North America process submits awards for payment and retrieves paid award information from PeopleSoft Payroll for North America (payroll). You do not run

the submittal and retrieval processes separately. You can run the process on demand or schedule it.

Paying Awards

The process only sends approved awards to payroll that have been scheduled with an award date prior to or equal to the current date.

Payroll calculates gross-up amounts and taxes, pays the cash awards, and posts the amounts to the appropriate General Ledger account.

If the currency code of the award does not match the currency code of the employee's paygroup, the award is rejected and the ERP administrator can use the Rejected Awards page to override the values.

If the converted amount of the award is greater than 8.2 digits, the award is rejected and the ERP administrator can use the Rejected Awards page to split the award into two payments.

Recording Awards

After payroll pays an award and publishes the results, the subscription process retrieves payment information and updates the following records:

- ERP data records. (ER_EE_REF_AWD)
- Job requisition expense data (ER_JOB_REQ_EXP).

  The job requisition expense amount is the amount paid by payroll, including taxes that have been grossed up.

  You can view the expense information on the Job Requisition Expense page. The expense code is *Refer Fee* (referral fee).

Running the Interface to Payroll for North America Process

Access the Employee Referral Programs process page to run this process. The same page runs the Eligibility and Awards process.

See Also

Understanding Integration With PeopleSoft Payroll for North America

"Tracking Recruitment Expenses," Entering Requisition Expenses

Running the Eligibility and Awards process

Viewing Awards Rejected by PeopleSoft Payroll for North America

Access the Rejected Awards page.



Rejected Awards page

Rejected Reason The reason that payroll rejected the award. Use this to determine which data to correct. Rejected reasons are:

Invalid Earning Code

Invalid Employee ID & Record #

Invalid Currency Code

Transaction already exists

Amount Exceeds Payroll Maximum

Edit Click this link to access the Referral Award Details page to correct the error that caused rejection.

Editing Rejected Awards

Use the Referral Award Details page to edit rejected awards.

Note. You can also override or reprocess eligibility for a rejected award on the Referral Administration - Eligibility page.

See Also

Overriding Award Details

Viewing and Overriding Employee Eligibility

CHAPTER 6

Managing Applicants

This chapter provides an overview of applicant data management and describes how to:

- Set up priority placement and veterans preference codes for U.S. Federal installations.
- Set up referral source subcategories.
- Enter basic applicant information.
- Link applicants to job requisitions.
- Assign priority placement codes for U.S. Federal applicants.
- Enter applicant competencies, education, work experience, and other accomplishments.
- Enter additional applicant information.
- Enter applicant eligibility and identity information.
- Track the progress of applicants.
- Merge duplicate applicant records.
- Change IDs and delete applicant records.

Understanding Applicant Data Management

In this section, we discuss prerequisites for setting up applicant information and provide an overview of:

- Adding applicants.
- Linking applicants to requisitions.
- Tracking applicant progress.
- Maintaining applicant data.

Prerequisites

Complete these tasks before setting up applicant information:

- (Optional) Set up disability tables.

  To record disability information for your applicants, set up the Diagnosis Table and the Accommodation Type Table.

- (Optional) Set up the Bank/Branch pages.

  To record applicant bank account details, enter bank and branch information. This control table is set up on the Manage Human Resources page.

See Also

PeopleSoft Human Resources PeopleBook: Monitor Health and Safety, "Setting Up Incident, Injury, and Illness, Tracking," Defining Injuries and Illnesses

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(GBR) (US) (USF) Meeting Disability Regulatory Requirements," Pages Used to Manage Accommodation Data

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Banks and Bank Branches"

Adding Applicants

Here's how to add applicants:

1. Complete the Applicant Data component.
2. Enter the following applicant information:
   - Competencies
   - Education
   - Accomplishments
   - Previous work experience
   - References
3. Enter additional applicant information as required by your organization.

   The following information that might be required to comply with local country regulatory requirements: disability details, citizenship, visa and work permit information, and bank account details.

For PeopleSoft HRMS Global installations, requisition screening uses applicant preferences from the applicant data component, competency, education, accomplishment, and prior work experience pages to compare applicants against job requisition requirements.

For U.S. Federal installations, the requisition screening process is in two parts. Preliminary screening consists of the Basic Eligibility and Priority Placement process, which uses applicant information that you enter in the applicant data pages to compare applicants against job requisition requirements. Final screening uses a combination of information you enter in the applicant data, education, and work experience pages to determine Minimum Qualifications. The information that you enter for the applicants competency and accomplishment are later used in the rating and ranking process.

Note. If you have installed PeopleSoft eRecruit, you can also use screening questions to screen applicants.

When you hire an applicant, the system automatically copies the applicant information to the new employee records, so you don't have to enter it twice.

Adding Internal Applicants

You must add internal applicants, both employees and non-employees, to your applicant data table so that you can process their applications in the same way as external applicants.

In the Applicant Data component, when you enter the employee ID the system sets up applicant records based on existing information in your system. If you have already set up competency and accomplishments for your workforce, the system copies selected information so you don't need to reenter any information.

To distinguish between types of applicants, the system assigns applicants an applicant type: *External, Employee,* or *Non-employee.*

Application Dating

When an applicant first submits an application, the system assigns an application date based on the system date. If the applicant subsequently sends you updated details, the system creates a new applicant record with a new application date. Information related to an applicant, such as prior work experience and disability information, is application-dated.

This provides an audit trail of changes to applicant information so you have immediate access to historical applicant data.

See Also

"Processing Applicants," Screening Applicants

"(USF) Processing Applicant Qualifications"

"Administering Job Requisitions," Creating Job Requisitions

Linking Applicants to Requisitions

If an applicant applies for a specific job requisition, you can link the applicant to the requisition when you set up the applicant data. Otherwise, you can link applicants to requisitions later when you have identified suitable openings. Use the Applicant Data – Applicant Requisition page or Applicant Activity – Requisitions page to link applicants to requisitions.

Each time that you link an applicant to a requisition, the system assigns a disposition status, which tells you how far the applicant has progressed for the particular requisition. When you first link an applicant to a requisition, the disposition is set to *Applied* and this changes in line with the recruitment process. Here is an example of how the disposition might change for a successful applicant:

1. *Applied*
2. *Preliminary Screen*
3. *Final Screen*
4. *Route*
5. *Interview*
6. *Offer*
7. *Ready to Hire*
8. Hired

The disposition statuses shown are the values supplied by PeopleSoft for global installations only. However, your system may use different values if your organization has modified the default codes.

If you use the requisition screening, requisition activity, and the eRecruit Manager Desktop self-service transactions to process applicants, the system automatically updates the disposition as the applicant progresses.

See Also

"Setting Up Recruit Workforce," Setting Up Recruitment Status Codes

(USF) Linking Applicants to Requisitions

The Priority Placement process is an additional process for U.S. Federal installations that links applicants to job requisitions. The process identifies applicants who should be included in the application process and links the applicant to the open job requisition, even if the applicant hasn't directly applied for the job.

PeopleSoft deliver disposition statuses and requisition screening processes that are specific to U.S. Federal processing. However, the disposition of the applicant is also updated automatically as the applicant progresses through the equivalent U.S. Federal processes (Basic

Eligibility, Determine Minimum Qualifications, Rating and Ranking pages) and through requisition activity.

See Also

USF Linking Applicants with Priority Placement

(JPN) Tracking Selectees for Japan

The standard PeopleSoft recruitment process begins with posting requisitions and ends with hiring—when applicants become employees. In between requisition posting and hiring, there are the other recruitment activities such as screening, interviewing, and offering and accepting employment.

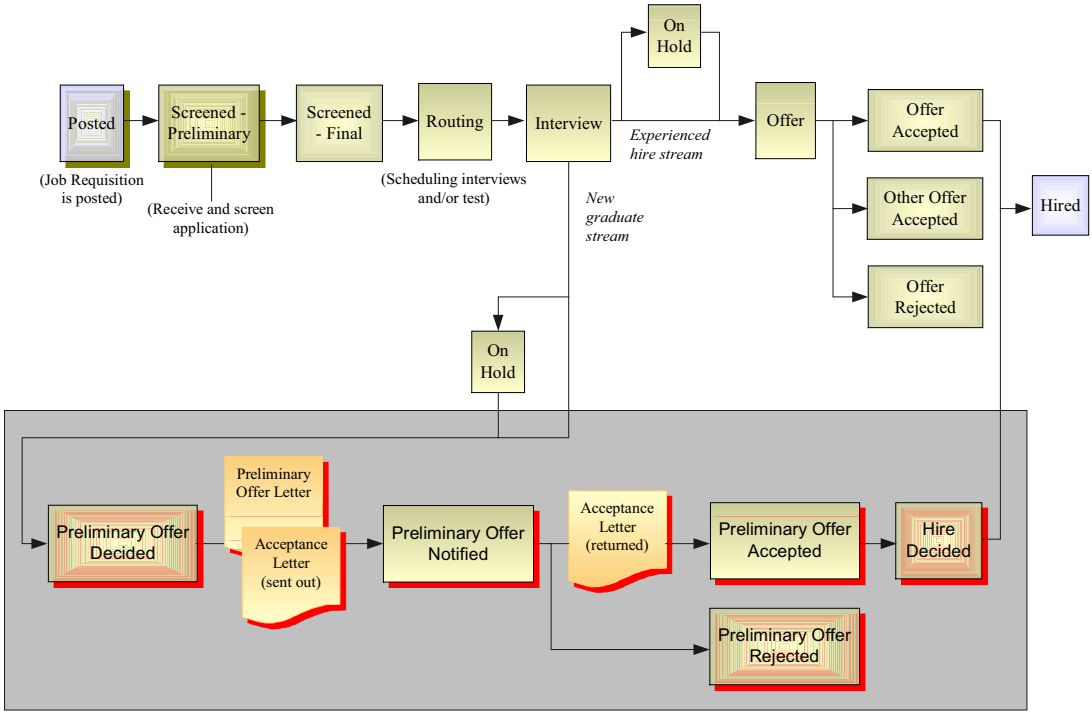
The recruitment process followed by most Japanese companies, however, requires "selectee" statuses between applicant and employee. Applicants become known as selectees when they have one of these four user-maintained preliminary offer statuses (applicant and selectee statuses are also known as "dispositions"):

- Preliminary offer decided.
- Preliminary offer notified.
- Preliminary offer accepted.
- Preliminary offer rejected.

There is a fifth user-maintained status of *Hire Decided.* You manually enter the *Hire Decided* status when an applicant who has accepted a preliminary offer is about to be hired. The status of *Preliminary Offer Accepted* remains until that decision is made, because it is possible that an applicant who has accepted may not in fact graduate and may not, therefore, be hired. The *Hire Decided* status distinguishes between those who have accepted and who may be hired and those who have accepted and will be hired.

Note. You maintain Dispositions on the Applicant Data – Applicant Requisitions page or the Applicant Activity - Requisitions page (they are the same page but reside in different components).

The following flow chart illustrates the common additional Japanese recruitment stages within the context of the standard recruitment process. The chart represents an organization that includes an acceptance letter with its version of a preliminary offer letter for the selectee to use when responding.



Recruit Workforce - Applicant Disposition Flowchart

Tracking the Progress of Applicants

With the Applicant Activity pages you can track where applicants are in the Recruit Workforce process and their status. If you prefer, you can view recruitment activity from the requisition level. Using the Requisition Activity pages you can view all the applicants for a given requisition at each stage in the recruitment process and update applicant information from here.

See Also

"Processing Applicants," Tracking Requisition Activity

Maintaining Applicant Data

Many organizations receive thousands of applications per year that are submitted over the internet, by email, by fax, and by post, leading to a large volume of applicant data. Sometimes applicants send in more than one resume with different information, which can result in applicants appearing in your system with more than one applicant ID.

To help you remove obsolete applicant data and prevent duplication, PeopleSoft Human Resources includes the following:

- Duplicate Applicant Search and the Process Duplicate Applicants process (ER_DUP_APPS).

  Duplicate Applicant Search identifies possible duplicates based on criteria that you define. You decide whether the applicant is actually duplicated and how to merge the duplicate data. The Process Duplicate Applicants process ensures that only one applicant ID is used throughout PeopleSoft Human Resources.

- Applicant ID Delete process (to delete a selected applicant ID).

- Applicant Purge process (to delete multiple applicants based on the age of their application).

The duplicate applicant process and the ID change process modifies the ID in every record where PeopleSoft HRMS uses it. Deleting an ID also deletes all security profiles associated with the ID.

See Also

Merging Duplicate Applicant Records

Changing IDs and Deleting Applicants

Common Elements Used in This Chapter

Referral Source	This is used to track how applicants are referred to your organization. Referral source is general source type, such as *Advertisement* or *Agency*. If referral source is ***Employee***, the system makes an **EmplID** field available for you to select the employee ID from the list of valid values.
Referral Source Subcategory	This is a specific source within a referral source. Referral source subcategories are defined in the Referral Source Subcategory table. Select the specific referral source. For example, if the applicant was referred by an agency, record the agency name in this field.
Specific Referral Source	Complete this field if the specific referral source is not defined in the Referral Source Subcategory table.
Letter Code	From a number of Applicant Data and applicant Activity pages, you can generate form letters for an applicant. Select the letter code if you want to generate a form letter. Define additional letter codes in the Standard Letter Table.
Date Letter Printed	The system automatically populates this field once you generate the letter.

See Also

Setting Up Referral Source Subcategories

"Processing Applicants," Generating Recruitment Letters

(USF) Setting Up Priority Placement and Veterans Preference Codes

Additional setup is required for U.S. Federal installations. Here's how to set up U.S. Federal codes:

- Define priority placement codes.

  Priority placement is used to track candidates who should get special consideration in the selection process for some reason, such as a reduction in force (RIF) or an involuntary change in position.

- Define veterans preference codes.

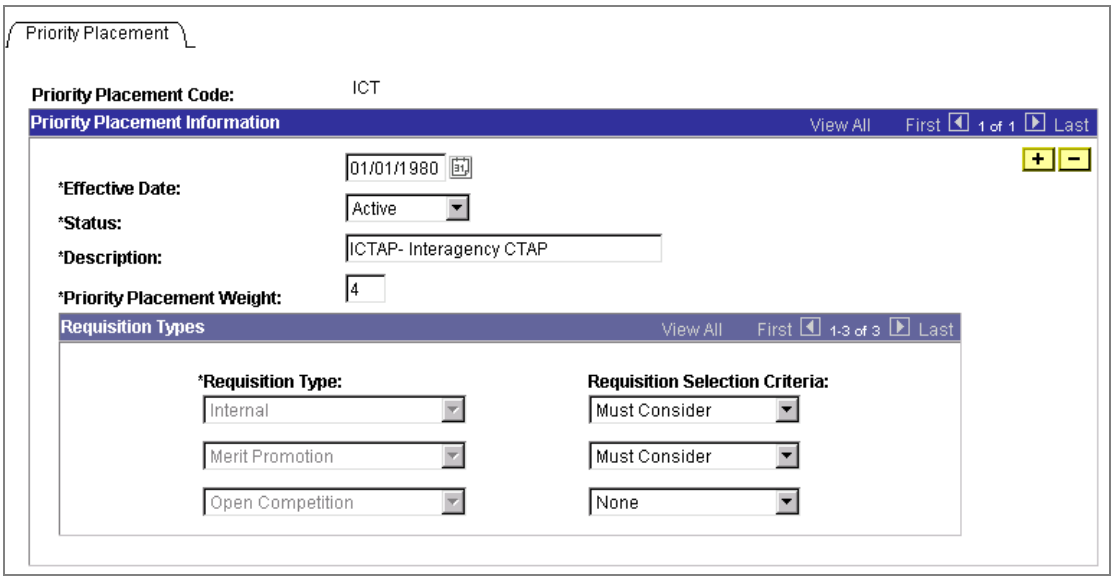
  Veterans preference codes are for special considerations for military service performed. These codes, and their associated values, are added to veterans' existing scoring to enhance their rating and ranking.

(USF) Pages Used to Set Up Priority Placement and Veterans Preference Codes

Page Name	*Object Name*	*Navigation*	*Usage*
Priority Placement	GVT_PRIO_TBL	Develop Workforce, Recruit Workforce (USF), Setup, Priority Placement Table, Priority Placement Codes	Create and edit priority placement codes.
Veterans Pref Tbl (veterans preference table)	GVT_VET_PREF_TBL	Develop Workforce, Recruit Workforce (USF), Setup, Veterans Preference Table, Veterans Pref Tbl	Create or edit veterans preference codes.

(USF) Defining Priority Placement Codes

Access the Priority Placement page.



Priority Placement page

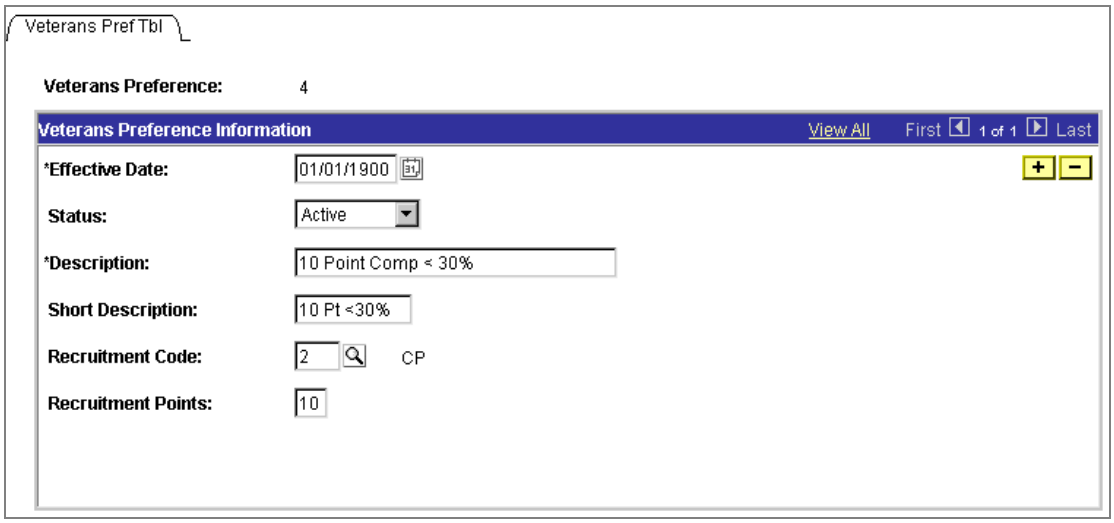
Priority Placement Weight Enter a weighting for the priority placement code.

Note. Lower numbers assigned to the Priority Placement Weight correspond to *higher* weights. The Priority Placement Weight has a direct impact on the Applicant Ranking process.

Requisition Type The system displays the requisition type and corresponding **Requisition Selection Criteria** that applies.

(USF) Defining Veterans Preference Codes

Access the Veterans Pref Tbl page.



Veterans Pref Tbl page

Recruitment Points Enter the points associated with the preference. This value is used on the Applicant Rating page.

If the Ranking Plan requires you to consider veterans preference, then the **Veterans Preference for Appointment Recruitment Code** that you select is used as a tie-breaker when more than one applicant has the same Priority Placement Weight and Final Rating Score. The codes are defined as follows:

Code	*Tie-Break Rank*	*Description*	*Short Description*	*Recruitment Code*	*Recruitment Points*
1	5	None	None	NV	0
2	4	5 Point	5 Point	TP	5
3	3	10 Point/ Disability	10 Pt Dis	XP	10
4	2	10 Point/ Compensable	10 Pt Comp	CP	10
5	3	10 Point/Other	10 Pt Other	XP	10
6	1	10 Point/ Compensable /30%	10 Pt 30%	CPS	10

Note. The values entered in this table are used in the Veterans Preference field on the Applicant Eligibility/Identity page.

Setting Up Referral Source Subcategories

Applicants find out about your organization and job openings from multiple sources. Use these fields to track how applicants are referred to your organization:

- Referral source

  This is a general source type, such as *Advertisement* or *Agency*. Referral sources are provided as translate values.

- Referral source subcategory

  This is a specific source within a referral source. For example, for the referral source *Agency,* you can define a subcategory for each agency your organization uses. Referral source subcategories are defined in the Referral Source Subcategory table.

The Applicant Summary by source report provides an analysis of the applicants referred from each referral source and subcategory.

This section explains how to set up referral source subcategories.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Recruit Workforce Reports"

Page Used to Set Up Referral Source Subcategories

Page Name	*Object Name*	*Navigation*	*Usage*
Referral Source Subcategory Table	ER_REF_SUBCAT	Develop Workforce, Recruit Workforce (GBL), Setup, Referral Source Subcategory Table Develop Workforce, Recruit Workforce (USF), Setup, Referral Source Subcategory Table	Set up referral source subcategories.

Setting Up Job Offer Components

Often job offers comprise multiple elements, of which the base salary is just one component. You may offer applicants a bonus, stock options, or car allowances in addition to a salary. To track all elements of job offers, you need to set up job offer components and job offer component types for your organization.

Use job offer component types to group together similar offer components. For example, you might have a type for the salary job offer components.

Hiring managers, recruiters, and recruiting administrators select from the pre-defined components when entering applicant job offers.

To set up job offer components:

1. Define job offer component types.
2. Define the job offer components.

See Also

"Processing Applicants," Entering Job Offers

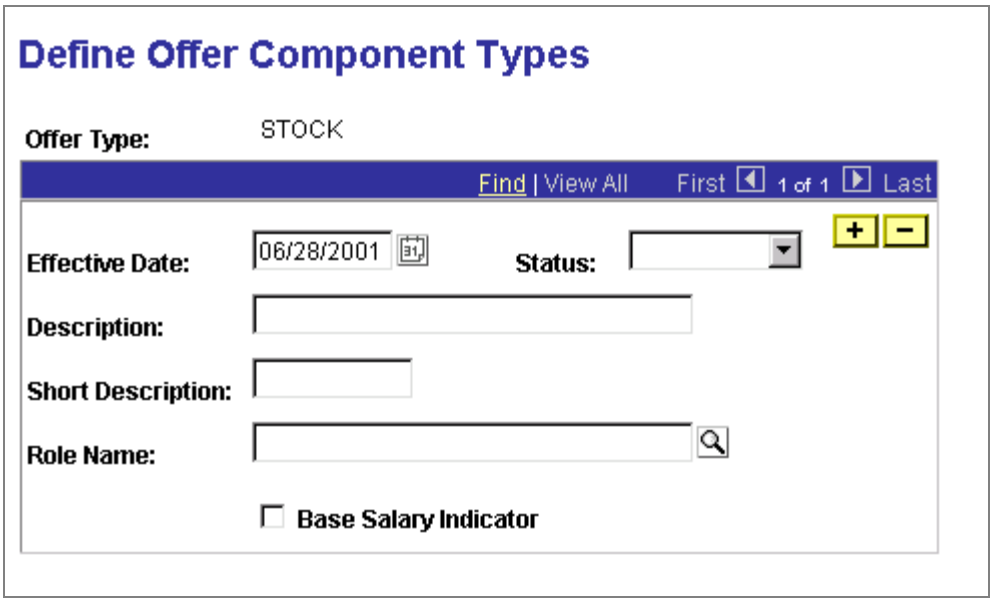
PeopleSoft eRecruit Manager Desktop PeopleBook, "Making Job Offers and Preparing to Hire Applicants"

Pages Used to Set Up Job Offer Components

Page	*Object*	*Navigation*	*Usage*
Define Offer Component Types	OFFER_TYPE_TBL	Develop Workforce, Recruit Workforce (GBL), Setup, Offer Component Type Table Develop Workforce, Recruit Workforce (USF), Setup, Offer Component Type Table	Set up the job offer component types that you use to group offer components.
Define Offer Components	OFFER_CMPNT_TBL	Develop Workforce, Recruit Workforce (GBL), Setup, Offer Component Table Develop Workforce, Recruit Workforce (USF), Setup, Offer Component Table	Set up job offer components and link them to component types.

Defining Job Offer Component Types

Access the Define Offer Component Types page.



Define Offer Component Types page

Offer Type Enter the name of the offer component type.

Role Name Select the role that is responsible for administering the offer component type. For example, if you create a component type for stock options, you would link this to the stock administrator role.

Set up roles using the PeopleTools Roles security component.

If you set up email workflow, the system sends an email to the person with the selected role to notify them of new hires.

Base Salary Indicator Select this check box if the component type forms part of the base salary. The system uses this check box to calculate the total base salary. When users enter a job offer, the system checks whether the base salary exceeds the maximum salary grade range for the job. You define the salary grades for a requisition on the Job Requisition Information page.

See Also

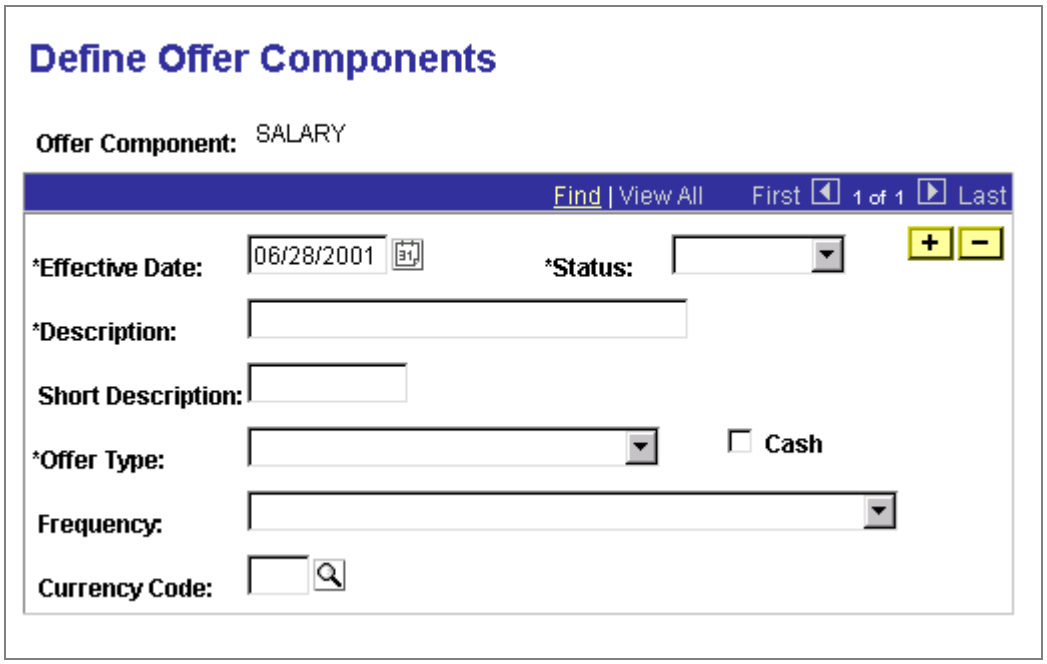
PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security"

"Administering Job Requisitions," Creating Job Requisitions

"Processing Applicants," Entering Job Offers "

Defining Job Offer Components

Access the Define Offer Components page.



Define Offer Components page

Offer Component Enter the name of the job offer component.

Offer Type Select the component type from the options available. Set up component types on the Define Offer Component Types page.

Cash Select this check box if the offer component is received as cash. For example, base salary is a cash component but for stock options you'd leave the check box cleared.

When users enter job offers, the system checks that the frequency and currency code are defined for offer components with this check box selected.

Frequency Enter the default **Frequency** and **Currency Code** for the offer component

Entering Basic Applicant Information

To enter basic applicant information:

- Enter the applicant contact information.
- Enter the applicant preferences.
- Link applicants to job requisitions.

If applicants apply for specific job openings, link them to the requisitions when you create the applicant ID. You can also link applicants to requisitions later when you identify suitable openings.

- (USF only). Assign priority placement codes.

Note. You must create applicant IDs for employees and non-employees who apply for job requisitions so that they can be included in the requisition process. For such internal applicants, enter the existing employee IDs and the system creates applicant IDs and copies the employee or non-employee information from the Administer Workforce tables.

Pages Used to Enter Basic Applicant Information

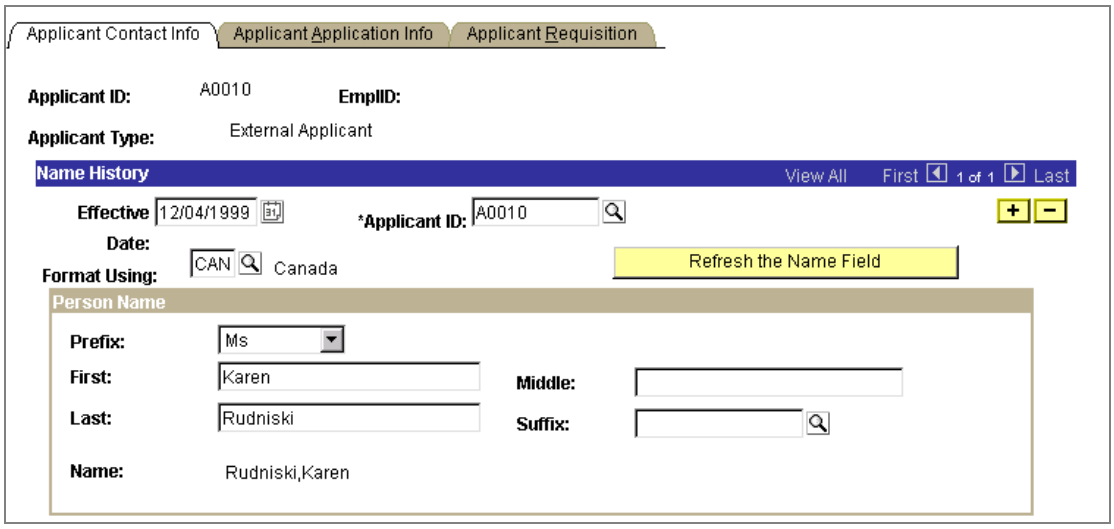
Page Name	*Object Name*	*Navigation*	*Usage*
Applicant Data – Applicant Contact Information	APP_PERSONAL_DATA1	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Data, Applicant Contact Information Develop Workforce, Recruit Workforce (USF), Use, Applicant Data, Applicant Contact Information	Record an applicant's name and address.
Postal Address	APP_ADDR_OTH_SEC	Click Mailing Address on the Applicant Data - Name page.	Record an applicant's mailing address, if this is different from the address that you entered on the Name page.
Email Addresses	APP_EMAIL_SEC	Click Email on the Name page.	Record the applicant's email addresses.
Phone Information	APP_PHONE_SEC	Click Phones on the Name page.	Record the applicant's phone numbers, including fax numbers and cellular phone numbers.

Page Name	*Object Name*	*Navigation*	*Usage*
Applicant Data – Applicant Application Information	APPLICATION_DATA1	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Data, Applicant Application Information Develop Workforce, Recruit Workforce (USF), Use, Applicant Data, Applicant Application Information	Record the applicant's preferences, such as: • Preferred locations and job functions. • Willingness to travel or relocate. • Federal preference data This information is used to screen applicants.
Applicant Data – Applicant Requisition	APPLICATION_DATA2	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Data, Applicant Requisition Develop Workforce, Recruit Workforce (USF), Use, Applicant Data, Applicant Requisition	If the applicant applies for specific requisitions, link the applicants to those openings.
Applicant Supply File	GVT_APP_SUPPLY_SEC	Click Applicant Supply file on the Applicant Requisition page	For U.S. Federal installations only. U.S. Federal applicants can apply for specific job requisitions, positions, or job codes. Use this page to enter positions or job codes that the applicant is applying for.

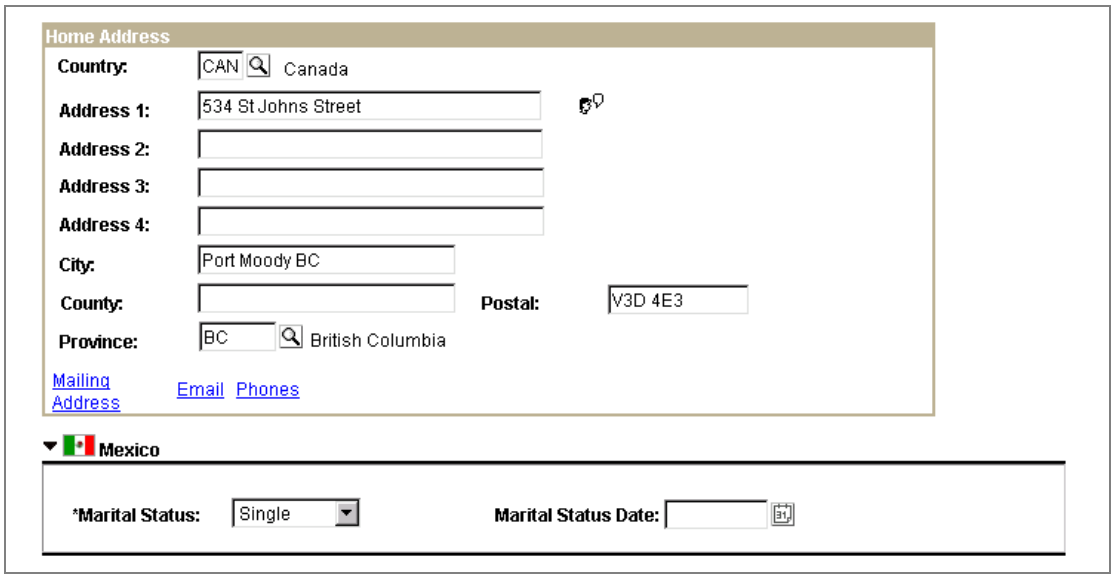
Page Name	Object Name	Navigation	Usage
Applicant Data - Priority Placement	GVT_PRIORITY_PLCMT	Develop Workforce, Recruit Workforce (USF), Use, Applicant Data, Priority Placement	For U.S. Federal installations only. Assign a priority placement code and other information to an applicant. Depending on individual circumstances, applicants may be entitled to automatic priority consideration for jobs meeting certain criteria. This applies whether they apply for those jobs or not. Special consideration entitlement is extended to an applicant as a result of involuntarily being displaced. This action is usually the result of a Reduction-In-Force, or an involuntary Position Change action that entitles the applicant to a period of Grade Retention.

Entering Applicant Contact Information

Access the Applicant Data - Name page.



Applicant Data - Applicant Contact Information page (1 of 2)



Applicant Data - Applicant Contact Information page (2 of 2)

Applicant ID

If you let the system automatically assign a new applicant number, it first appears as *NEW*. The actual number assigned to the applicant appears after you save the information that you enter in the Applicant Data pages.

The system assigns employees or non-employees applicant IDs and copies their details to the Applicant Data pages. Information copied from employee or non-employee records is for information only and can't be updated from the recruit workforce pages.

Important! To avoid maintaining two different sets of applicant numbers, we recommend that you either always assign numbers manually or always let the system do it, not both.

Mailing Address If the applicant's mailing address is different the home address, click to access the Postal Address page.

Email Click to access the Email Addresses page where you enter the applicant's email addresses.

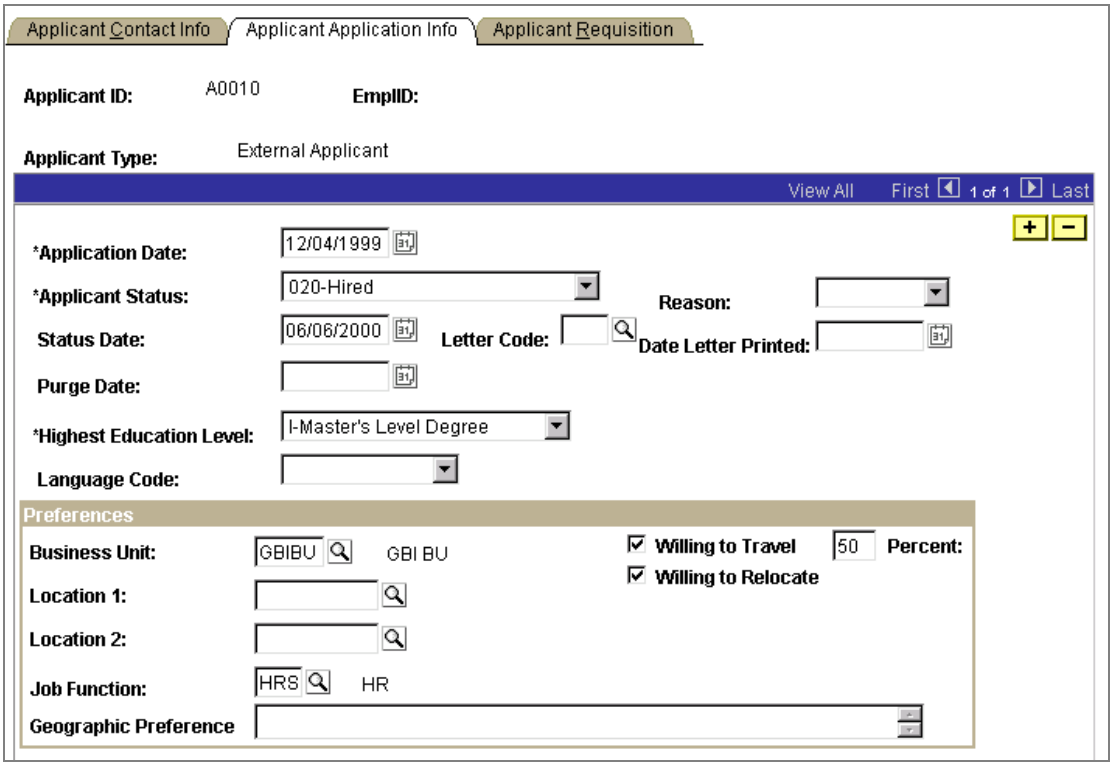
Phones Click to access the Phone Information page where you enter details of the applicant's telephone numbers.

See Also

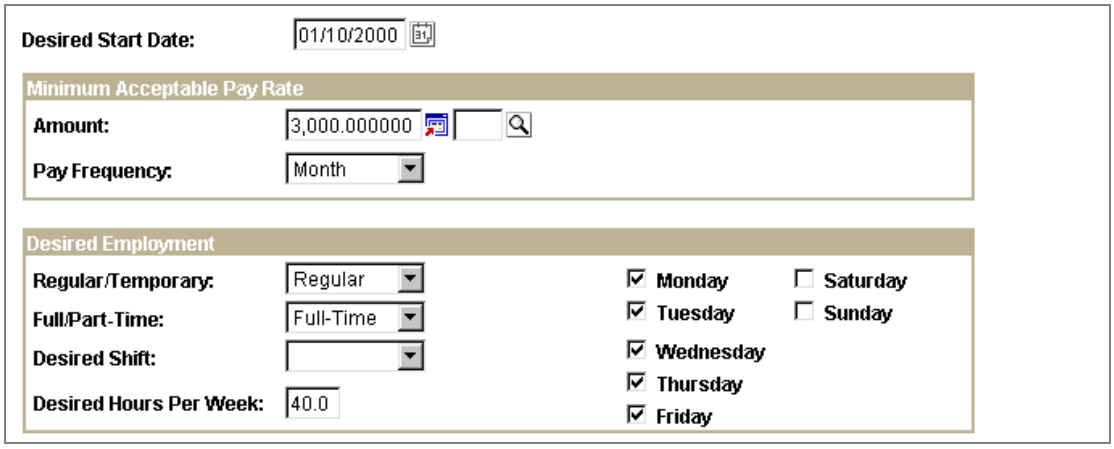
PeopleSoft HRMS PeopleBooks Preface, "About this PeopleBook," Entering Name Information and Entering Address Information

Entering Applicant Preferences

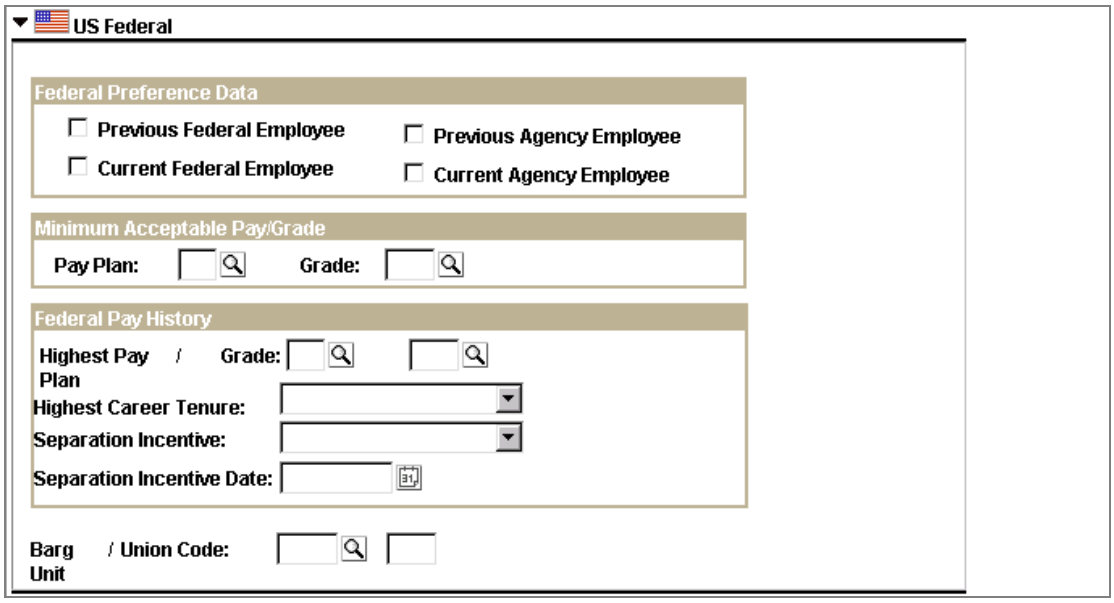
Access the Applicant Data – Applicant Application Info page.



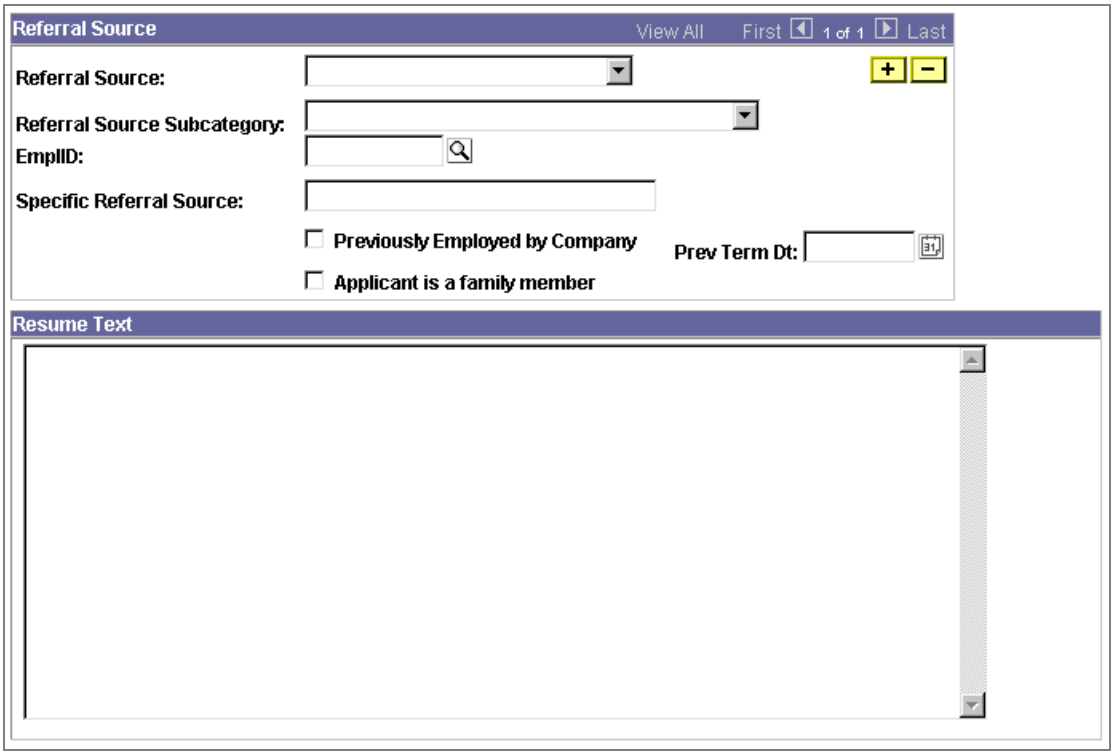
Applicant Data - Applicant Application Info page (1 of 4)



Applicant Data - Applicant Application Info page (2 of 4)



Applicant Data - Applicant Application Info page (3 of 4)



Applicant Data - Applicant Application Info page (4 of 4)

Applicant Status

Select the applicant status from the available options and update **Status Date.** You can use the status values supplied by PeopleSoft or define your own status values and rules.

PeopleSoft delivers the following values:

Active: The default status for new applicants.

Hired: The system automatically selects *Hired* when you hire applicants. The system also updates the disposition status of other applicants who applied for the job. Do not manually set the status to ***Hired,*** as this will cause inconsistency in your applicant data.

Inactive: Use this status for applicants that have withdrawn. When you change applicants' status to ***Inactive,*** the status of any requisitions that they have applied for is set to ***Withdrawn.*** The system excludes inactive applicants from requisition screening.

Purge Date

Enter a date to indicate when you no longer need this application information and the data can be removed from the database.

This date is for your information only—the system doesn't automatically purge applicant records on this date.

Highest Education Level Select the applicant's highest education level from the available options.

Language Code Select the applicant's language from the available options.

Preferences

Business Unit If the applicant has expressed a preferred location for work, select the appropriate business unit. Select the applicant's first and second choice of location in **Location 1** and **Location 2.**

Job Function Select the function in which the applicant is seeking work. The system uses this information when searching for applicants who meet the requirements of a job opening.

Set up job functions on the Job Function Table page.

Geographic Preference Enter the applicant's geographic preference. This is a free-format field so you can use this field to suit your organization. For example, you could use the field to indicate national regions, such as north or west, or international regions.

Note. This field is not used in requisition screening.

Willing to Travel Select if the applicant is willing to travel for work and enter a value in **Percent** to indicate the amount of time the applicant is willing to spend travelling.

Willing to Relocate Select if the applicant is willing to move to a new location.

Minimum Acceptable Pay Rate

Amount Enter the amount that the applicant will accept, select the currency, and specify the related unit in **Pay Frequency.**

For example, if the applicant will accept a pay rate of 20,000 USD per year, enter *20,000* in this field and enter the pay frequency *Year.*

Desired Employment

Regular/Temporary Select ***Regular*** if the applicant is seeking a permanent job, ***Temporary*** if the applicant wants a temporary contract, or *Either* if the applicant is willing to consider both.

Full/Part-Time Select ***Full-Time*** or ***Part-Time*** if the applicant is seeking a particular type of job or *Either* if the applicant is willing to consider both full-time and part-time jobs.

Desired Shift If the applicant wants shift work, select the appropriate shift from the available options.

Desired Hours Per Week — Enter the number of hours that the applicant is willing to work per week and select the days that the applicant wants to work.

US Federal

Federal Preference Data — Select the appropriate check box to indicate whether the applicant is a current or previous employee of the federal government or an agency.

Minimum Acceptable Pay/Grade — Enter a minimum **Pay Plan** and **Grade** for the applicant, if known.

Federal Pay History — If the applicant is or was a Federal employee, enter the **Highest Pay Plan/Grade** and **Highest Career Tenure.**

Barg Unit/Union Code (bargaining unit) — Enter a value if the applicant is a past or present Federal employee.

Referral Source

Previously Employed by Company — Select this check box if the applicant was previously an employee and complete the **Prev Term Dt** (previous termination date).

Applicant is a family member — Select if the applicant is related to the employee specified in EmplID.

Resume Text

If you have an electronic copy of the applicant's resume, copy the text into the scroll area.

See Also

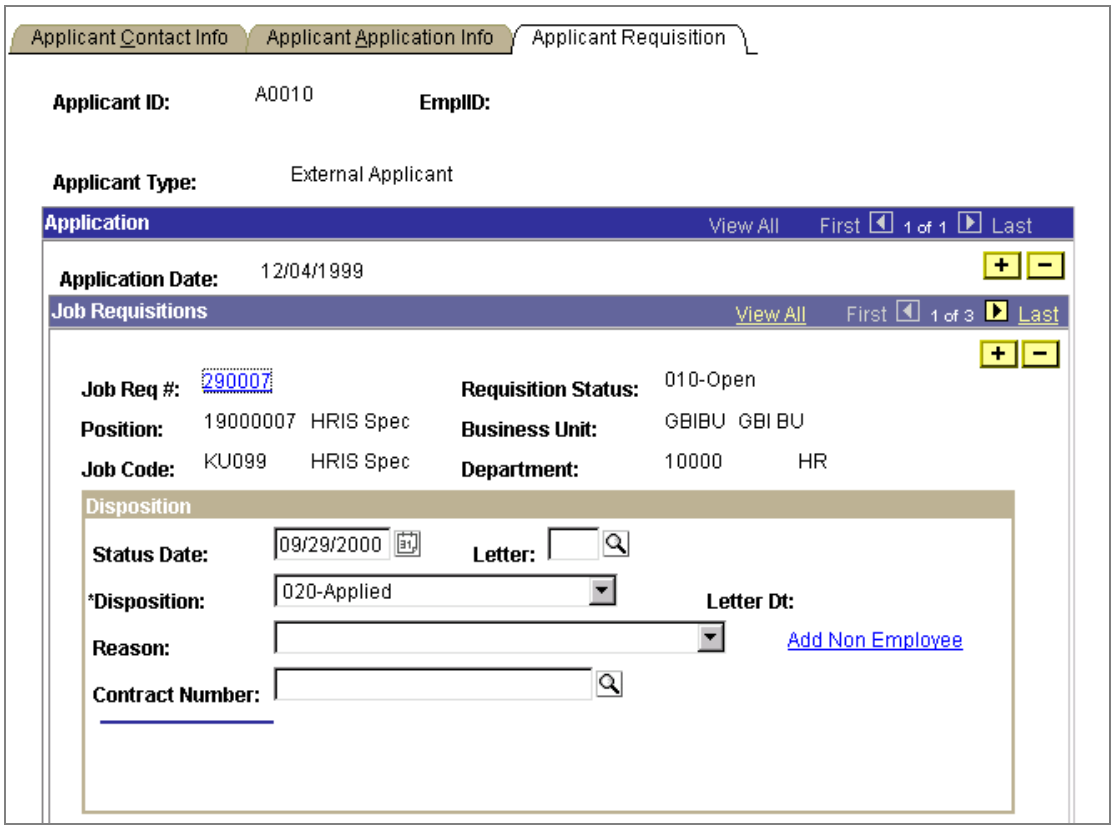
"Setting Up Recruit Workforce," Setting Up Recruitment Status Codes

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Generating Form Letters"

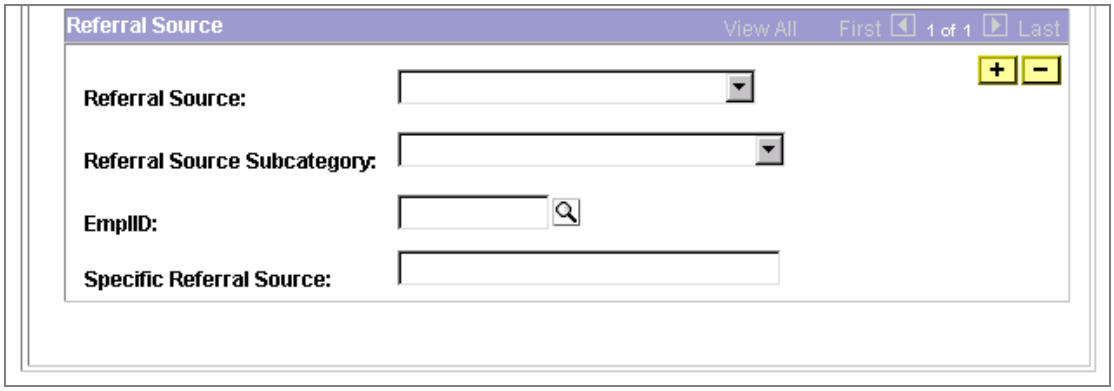
Purging Applicant Data and "Setting Up Jobs and Pay Groups," Page Used to Define Job Function Codes

Linking Applicants to Requisitions

Access the Applicant Data – Applicant Requisition page.



Applicant Data - Applicant Requisition page (1 of 2)



Applicant Data - Applicant Requisition page (2 of 2)

Job Req # (job requisition number) — If the applicant applied for a specific job requisition or you have identified a suitable opening, select the requisition from the list of open requisitions. Otherwise leave this field blank.

Applicant Supply File — For U.S. Federal installations only. Click this link to access the Applicant Supply File page where you select positions or job codes that the applicant is applying for.

Disposition

Disposition	The system populates the disposition and **Reason** from the applicant data. Disposition indicates how far the applicant has progressed for a given job requisition. If an applicant submits a resume without specifying a requisition, set the disposition to ***Applied*** and link the applicant to a requisition later. If your organization uses requisition screening and the PeopleSoft eRecruit Manager Desktop collaborative application to process applicants, the system updates applicants' dispositions automatically. However, you can also manually update applicants' disposition from this page. When you change disposition, the system uses the recruitment status rules to determine the effect on other records.
Date Addl Info Requested/ Date Recd (date additional information requested/date received)	This field appears for U.S. Federal installations only. Indicate the date when further information was sought or received.
Date Reconsideration Received	This field appears for U.S. Federal installations only. Enter the date when the disposition status changes because further supporting documentation is received.

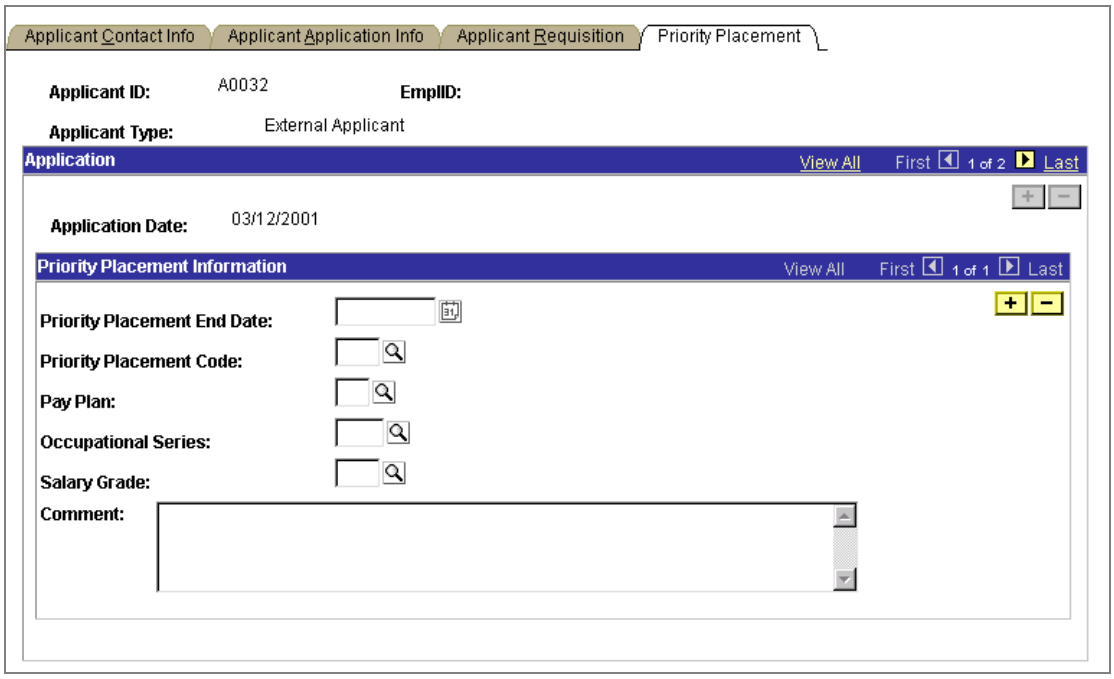
You can also link applicants to requisitions from Applicant Activity.

See Also

Tracking Applicants

(USF) Assigning Priority Placement Codes

Access the Applicant Data - Priority Placement page.



Applicant Data - Priority Placement page

Priority Placement End Date	The date when priority placement considerations expire.
Priority Placement Code	Set up values for this field in the Priority Placement Table.
Pay Plan, Occupational Series, and **Salary Grade**	Select the values associated with the priority considerations being taken.

See Also

(USF) Setting Up Priority Placement and Veterans Preference Codes

"(USF) Processing Applicant Qualifications," Running Priority Placement and Basic Eligibility Processes

Entering Applicant Competencies

To enter applicant competencies:

1. Enter evaluation information.
2. Assign competencies to the applicant.
3. Rate the applicant's proficiency in each competency.
4. Enter verification details.

(USF) Competency Information

For U.S. Federal government installations, the competency information entered in the Competencies component is not used to rate applicants. This is for informational purposes only.

Instead, you use the Applicant Rating pages to rate applicants on the competencies and accomplishments that are required for the job requisition. The system populates the Applicant Rating pages with the competencies and accomplishments that were specified on the Federal Screening Criteria page.

If you have installed PeopleSoft eRecruit, applicants can rate themselves when they apply online.

See Also

"(USF) Processing Applicant Qualifications," Rating Applicants

"Administering Job Requisitions," (USF) Entering Federal Screening Criteria

Pages Used to Enter Applicant Competencies

Page Name	*Object Name*	*Navigation*	*Usage*
Competency Evaluation	APP_CM_COMP_EVL1	Develop Workforce, Recruit Workforce (GBL), Use, Competencies, Competency Evaluation Develop Workforce, Recruit Workforce (USF), Use2, Competencies, Competency Evaluation	Enter information about applicant competency evaluations and the person who carried out the evaluations.
Competency Assignment	APP_CM_COMP_ASGN	Develop Workforce, Recruit Workforce (GBL), Use, Competencies, Competency Assignment Develop Workforce, Recruit Workforce (USF), Use2, Competencies, Competency Assignment	Assign competencies to an applicant.

Page Name	Object Name	Navigation	Usage
Competency Rating	APP_CM_COMP_PROF	Develop Workforce, Recruit Workforce (GBL), Use, Competencies, Competency Rating Develop Workforce, Recruit Workforce (USF), Use2, Competencies, Competency Rating	Assign a proficiency rating to each of the applicant's competencies.
Competency Verification	APP_COMPETENCIES	Develop Workforce, Recruit Workforce (GBL), Use, Competencies, Competency Verification Develop Workforce, Recruit Workforce (USF), Use2, Competencies, Competency Verification	Define the verification details for each applicant competency, including the year the competency was acquired, when it was last used, and the number years of experience of using the competency.

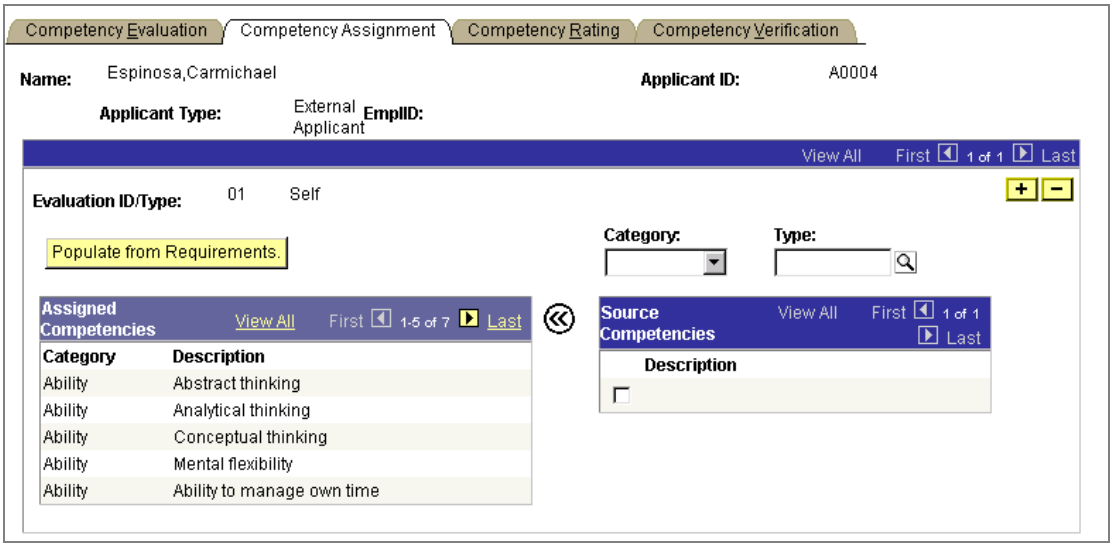
The competency pages in Recruit Workforce are similar to those in the Manage Competencies business process.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments," Pages Used to Enter Employee Competencies

Assigning Competencies to Applicants

Access the Competency Assignment page.



Competency Assignment page

Populate from Requirements Click to list the competencies required by the job requisitions that the applicant has applied for.

If you have not linked the applicant to requisitions, the system doesn't populate any competencies.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments," Pages Used to Enter Employee Competencies

Entering Applicant Education and Qualifications

This section discusses how to enter the following applicant information:

- Education and training.
- Language skills.
- Licenses/certificates.
- Membership of professional organizations.
- Honors or awards.
- Test results.

Pages Used to Enter Education and Qualifications

Page Name	*Object Name*	*Navigation*	*Usage*
School Education	APP_SCHOOL_EDUCATN	Develop Workforce, Recruit Workforce (GBL), Use, Education, School Education Develop Workforce, Recruit Workforce (USF), Use2, Education and Training, School Education	Record details of the schools that an applicant has attended and the areas studied.
Professional Ed and Trg (professional education and training)	APP_EDU_TRAIN_GBL1	Develop Workforce, Recruit Workforce (GBL), Use, Education, Professional Ed and Trg Develop Workforce, Recruit Workforce (USF), Use2, Education and Training, Professional Ed and Trg	Enter details of further education that the applicant has completed, including the type of degree acquired and where and when the qualification was acquired. Before you can enter degrees on this page, you must set up your Degree table. If you want to use Major codes and School codes (optional), set up the Major Table and School Table. You enter faculties, sub-faculties, and major categories on the (JPN)Faculty Table page.
Professional Courses	APP_EDU_TRAIN_GBL2	Develop Workforce, Recruit Workforce (GBL), Use, Education, Professional Courses Develop Workforce, Recruit Workforce (USF), Use2, Education and Training, Professional Courses	Enter details of the courses that an applicant has completed.

Page Name	*Object Name*	*Navigation*	*Usage*
Licenses/Certificates	APP_LICENSE_CERTIF	Develop Workforce, Recruit Workforce (GBL), Use, Licenses and Certificates, Licenses/Certificates Develop Workforce, Recruit Workforce (USF), Use2, Licenses and Certificates, Licenses/Certificates	Record any licenses or certificates that applicants have attained that are pertinent to their jobs. For example, if an employee in your Finance and Accounting department has a CPA license, enter the information here. You must set up your Licenses/Certificates table before you enter license or certificate information for applicants.
Memberships	APP_MEMBERSHIPS	Develop Workforce, Recruit Workforce (GBL), Use, Memberships, Memberships Develop Workforce, Recruit Workforce (USF), Use2, Memberships, Memberships	Enter details of any professional organizations applicants belong to that are pertinent to their jobs. You must set up your Memberships table before you can enter membership information for applicants.
Languages	APP_LANGUAGES	Develop Workforce, Recruit Workforce (GBL), Use, Languages, Languages Develop Workforce, Recruit Workforce (USF), Use2, Languages, Languages	Enter information about the languages in which applicants are proficient, particularly those pertinent to their jobs or to your industry. You must set up your Language table before you can enter language information for applicants.

Page Name	Object Name	Navigation	Usage
Honors Awards	APP_HONORS_AWARDS	Develop Workforce, Recruit Workforce (GBL), Use, Honors Awards, Honors Awards Develop Workforce, Recruit Workforce (USF), Use2, Honors and Awards, Honors Awards	Record any special awards or honors that applicants have received. You must set up your Honor/Award table before you can enter honor and award information for applicants.
Test Results	APP_TEST_RESULTS	Develop Workforce, Recruit Workforce (GBL), Use, Test Results, Test Results Develop Workforce, Recruit Workforce (USF), Use2, Test Results, Test Results	Enter the results of standard tests that you administer to job applicants, such as typing, programming aptitude, or mathematical tests. You must set up your Test table before you can enter applicant test results.

The pages used to enter applicant accomplishments are similar to those used for employees in the Manage Competencies business process.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Tracking Worker Competencies and Accomplishments," Entering Employee Accomplishments

Entering Work Experience and References

This section explains how to enter:

- Applicants' employment history.
- References.

Pages Used to Enter Work Experience and References

Page Name	*Object Name*	*Navigation*	*Usage*
Prior Work Experience 1	APP_PRIOR_WRK_EXP1	Develop Workforce, Recruit Workforce (GBL), Use, Prior Work Experience, Prior Work Experience 1 Develop Workforce, Recruit Workforce (USF), Use, Prior Work Experience, Prior Work Experience 1	Enter an applicant's current and previous employers.
Prior Work Experience 2	APP_PRIOR_WRK_EXP2	Develop Workforce, Recruit Workforce (GBL), Use, Prior Work Experience, Prior Work Experience 2 Develop Workforce, Recruit Workforce (USF), Use, Prior Work Experience, Prior Work Experience 2	Enter details of an applicant's employment history, including job title and salary information for previous and current jobs.
Prior Work Experience - Federal Data	GVT_APP_PRIWRKEXP	Develop Workforce, Recruit Workforce (USF), Use, Prior Work Experience, Federal Data	Enter information about a previous Federal position that the applicant held.
Reference Profile	APP_REFERENCES1	Develop Workforce, Recruit Workforce (GBL), Use, References, Reference Profile Develop Workforce, Recruit Workforce (USF), Use2, References, Reference Profile	Track references supplied by applicants.

Page Name	Object Name	Navigation	Usage
Reference Address	APP_REFERENCES2	Develop Workforce, Recruit Workforce (GBL), Use, References, Reference Address Develop Workforce, Recruit Workforce (USF), Use2, References, Reference Address	Enter the addresses of references for an applicant.

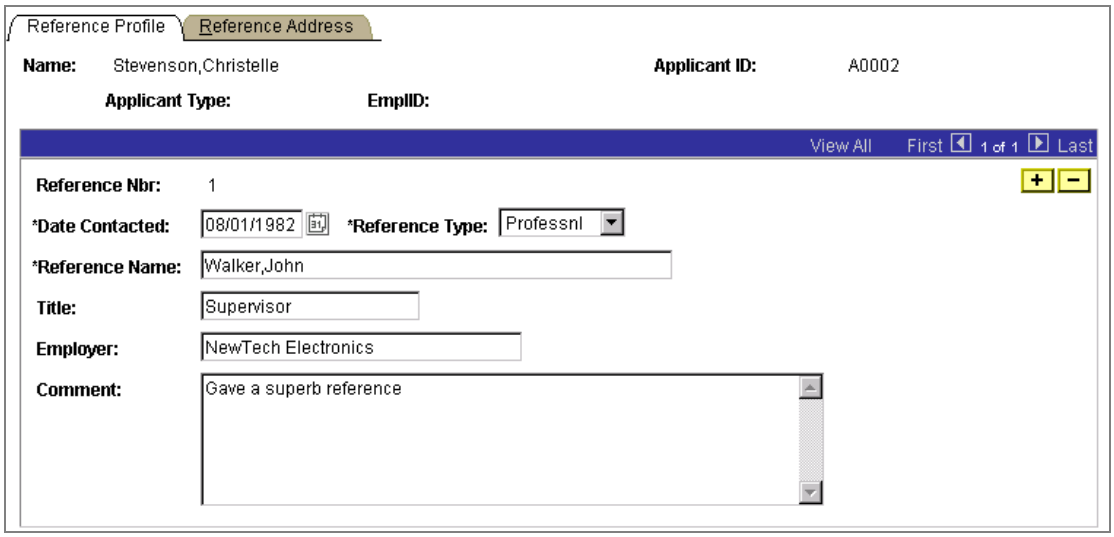
The pages used to enter applicant employment information are similar to those used for employees in the Administer Workforce business process.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Tracking Prior Work Experience

Entering Reference Profiles

Access the Reference Profile page.



Reference Profile page

Date Contacted Enter the date that you contacted the reference.

Reference Type Select from the available options: *Professnl* (professional), *Personal,* or *Both.*

Reference Name Enter the name of the person giving the reference.

Title	Enter the title of the person giving the reference.
Employer	Enter the name of the employer where the reference is employed.
Comment	Enter a summary of the comments that the reference made about the applicant.

Entering Additional Applicant Information

This section discusses supplemental applicant information you can enter:

- Disabled applicant tracking information.
- Accommodation requests.
- Accommodation options.
- Bank account information.
- Passport information.
- Passport issue details.
- Visa information.
- Supporting visa information.

Pages Used to Enter Additional Applicant Information

Page Name	*Object Name*	*Navigation*	*Usage*
Disability	APP_DISABILITY	Develop Workforce, Recruit Workforce (GBL), Use, Disability, Disability	Track applicants who are disabled and record additional information required by local country regulations.

Page Name	Object Name	Navigation	Usage
Accommodation Request	APP_ACCOM_RQST	Develop Workforce, Recruit Workforce (GBL), Use, Disability, Accommodation Request	Enter accommodation requests that an applicant makes of your organization. Enter diagnosis codes for the disabilities applicants have that prevent them from performing essential job tasks and result in the accommodation requests. Before you can assign Diagnosis Codes, you must set up the Diagnosis Table.
Accommodation Option	APP_ACCOM_OPTN	Develop Workforce, Recruit Workforce (GBL), Use, Disability, Accommodation Option	Enter the options or alternatives being considered to resolve an accommodation request. Before you can assign Accommodation Types, you must set up the Accommodation Type Table.
Bank Account	APP_BANKACCT	Develop Workforce, Recruit Workforce (GBL), Use, Bank Accounts, Bank Account	Record applicant bank account information.
Citizenship/Passport	APP_CITIZN_PSSPRT1	Develop Workforce, Recruit Workforce (GBL), Use, Identification Data, Citizenship/Passport	Record an applicant's passport number, the country where the passport was issued, and date that it was issued.
Issue Details	APP_CITIZN_PSSPRT2	Develop Workforce, Recruit Workforce (GBL), Use, Identification Data, Issue Details	Enter information about the passport office that issued an applicant's passport.
Visa/Permit	APP_VSA_PMT_DATA1	Develop Workforce, Recruit Workforce (GBL), Use, Identification Data, Visa/Permit	Enter an applicant's work visa information.

Page Name	Object Name	Navigation	Usage
Visa/Permit Supporting Docs (visa/permits supporting documents)	APP_VSA_PMT_DATA2	Develop Workforce, Recruit Workforce (GBL), Use, Identification Data, Visa/Permit Supporting Docs	Record details of any documentation used to support an applicant's work visa or permit.

The pages used to enter additional applicant information are similar to those used for employees in the Administer Workforce business process.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Tracking Disabilities, Recording Employee Bank Account Information, and Tracking Employee Passport and Citizenship Information

Entering Applicant Eligibility and Identity Information

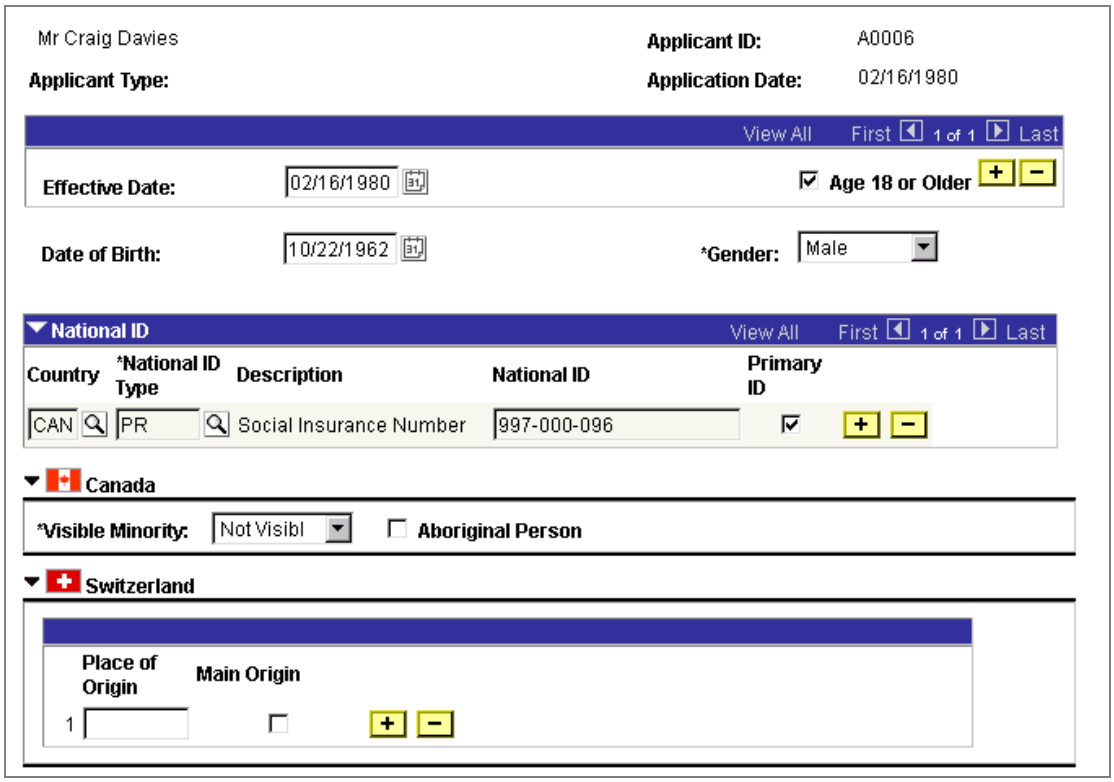
This section describes how to enter applicant eligibility and identity information required by your local country regulations. You may need to restrict access to this applicant information to comply with equal opportunity laws in your region. PeopleSoft provides a diversity manager role for this purpose. Recruiters should not have access to this information.

Page Used to Enter Applicant Eligibility and Identity Information

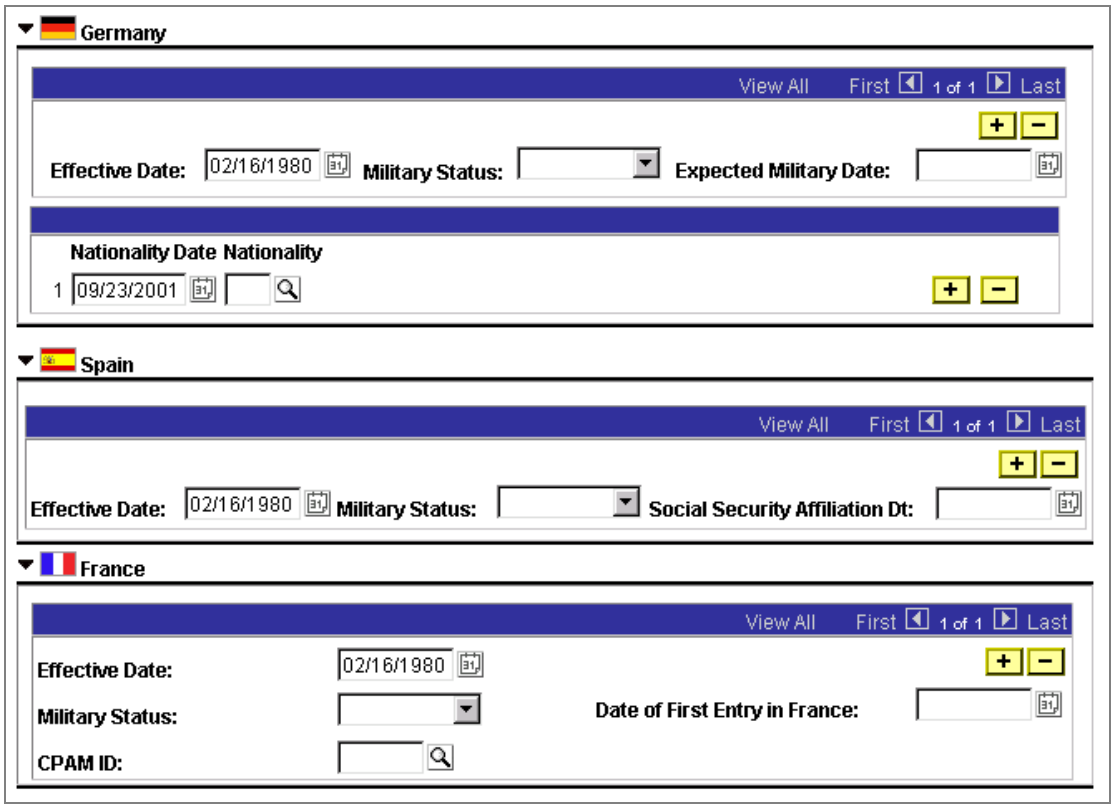
Page Name	Object Name	Navigation	Usage
Eligibility/Identity	APP_PERSONAL_DATA3	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Eligibility/Identity Develop Workforce, Recruit Workforce (USF), Use, Applicant Eligibility/Identity	Enter personal information about the applicant, such as date of birth and gender. Enter information required by local country regulations.

Entering Applicant Self Identification Information

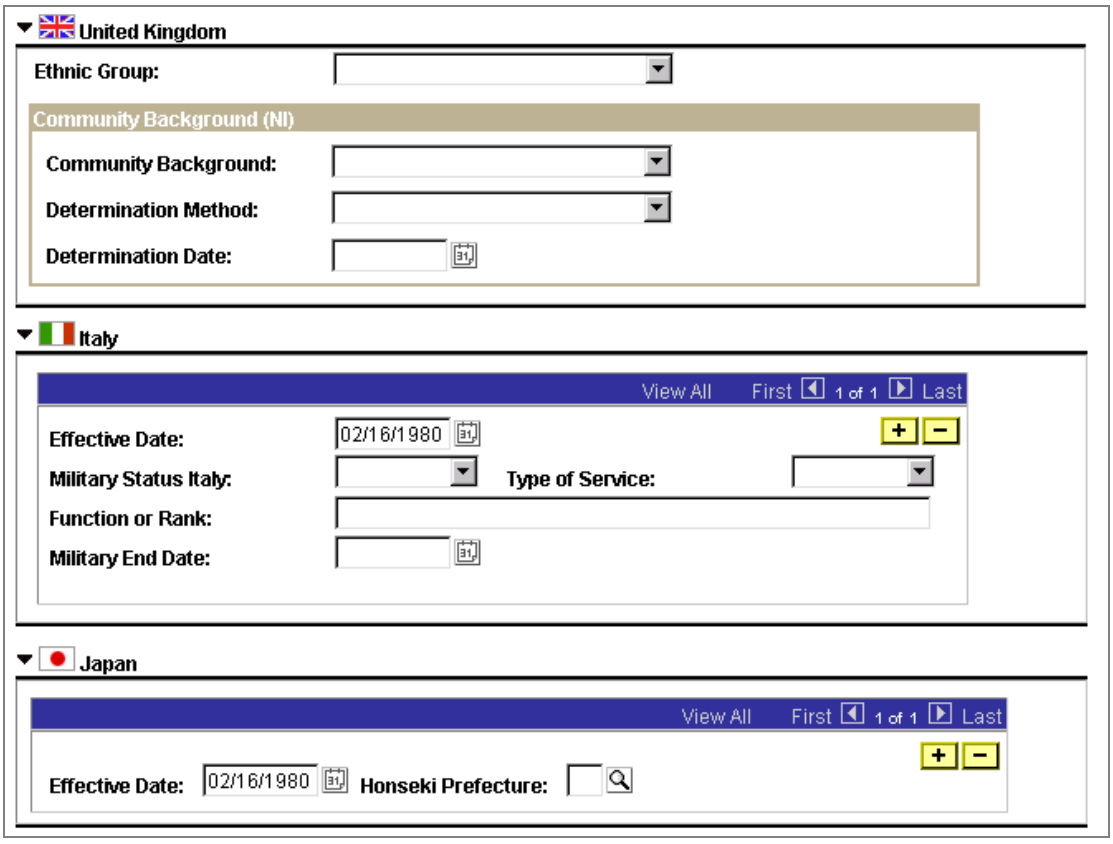
Access the Eligibility/Identity page.



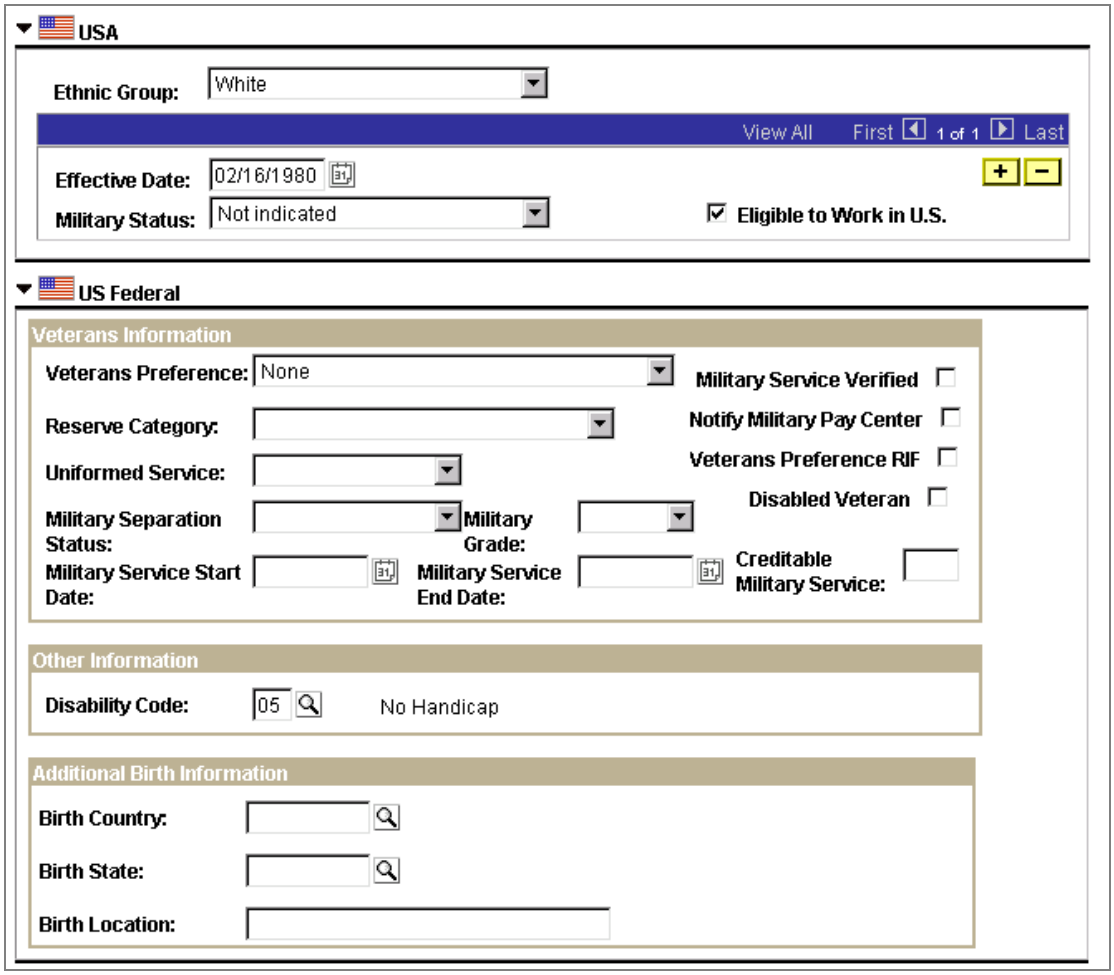
Eligibility/Identity page (1 of 6)



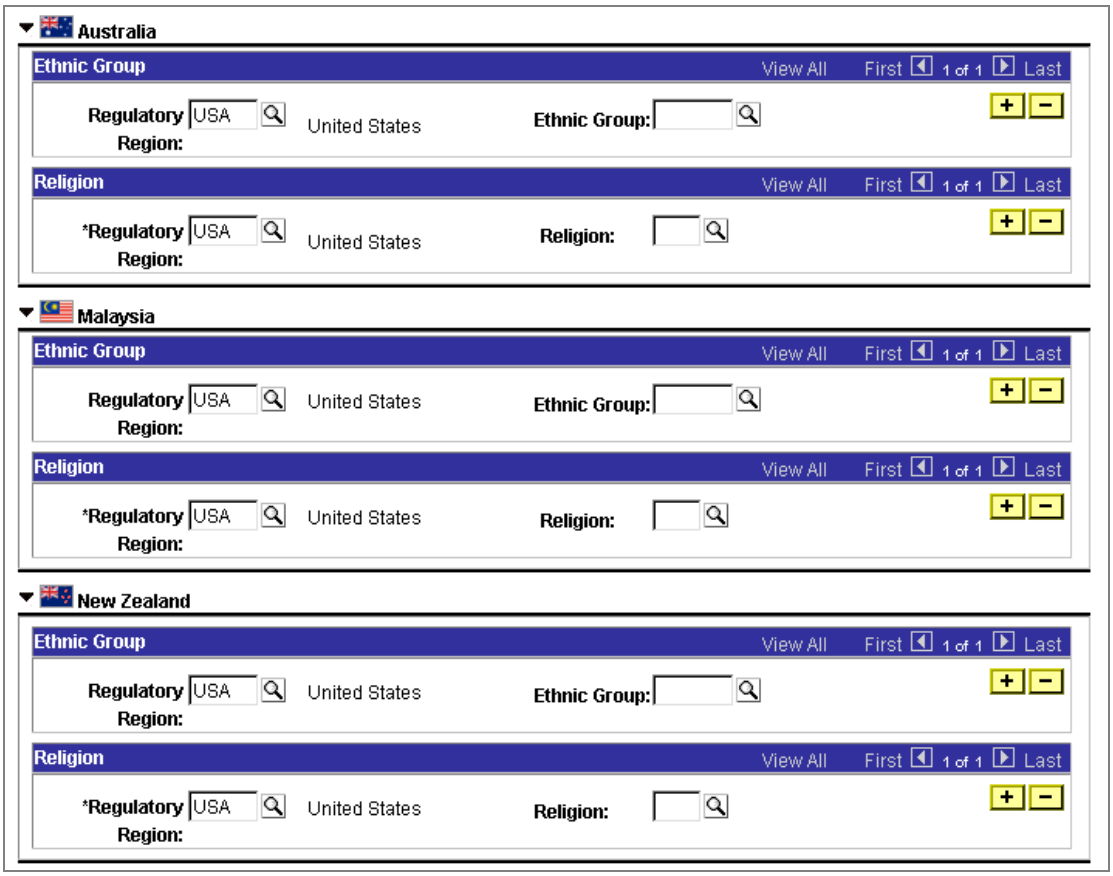
Eligibility/Identity page (2 of 6)



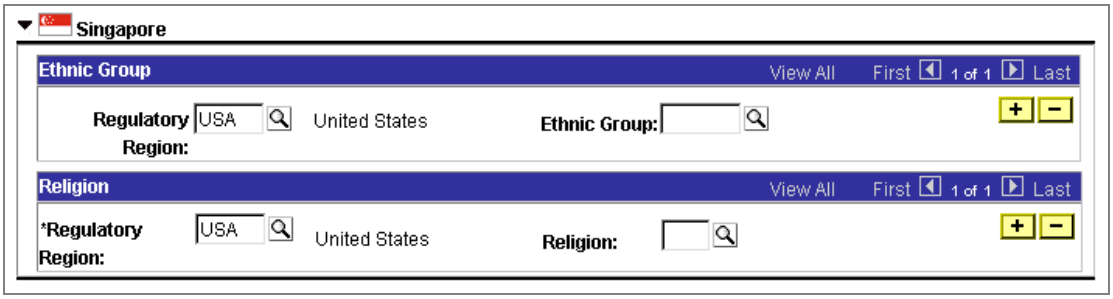
Eligibility/Identity page (3 of 6)



Eligibility/Identity page (4 of 6)



Eligibility/Identity page (5 of 6)



Eligibility/Identity page (6 of 6)

Age 18 or Older Clear the check box if the applicant is less than 18 years old.

Note. This field does not appear for U.S. Federal installations.

National ID

National ID Type Select a national ID type from the list of options and enter the applicant's **National ID** number.

Country-Specific Fields

Country-specific fields are the same as those on Personal Data – Identity/Diversity page.

US Federal: Veterans Information

Complete this group box for applicants who are veterans. The fields are the same as those on Veterans Info page accessed from Hire – Personal Data page.

US Federal: Other Information

Disability Code If the applicant is disabled, select the code that identifies the type of disability. Otherwise, select ***No Handicap.***

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Establishing Work Eligibility and "(USF) Hiring Employees "

Tracking Applicants

With the Applicant Activity pages, you can track the progress of applicants in the recruitment process.

This section discusses how to:

- View applicants' applications and link them to additional job requisitions.
- View routing information.
- View interview schedules.
- View interview results.
- Enter job offer details.
- Record expenses claimed by applicants.

U.S. Federal users have an additional link on all the Applicant Activity pages to the Applicant Supply File page where they link applicants to job codes or positions that an applicant is applying for. This page is also accessible from the Applicant Data – Applicant Requisitions page.

See Also

Linking Applicants to Requisitions

Processing Applicants

"Tracking Recruitment Expenses"

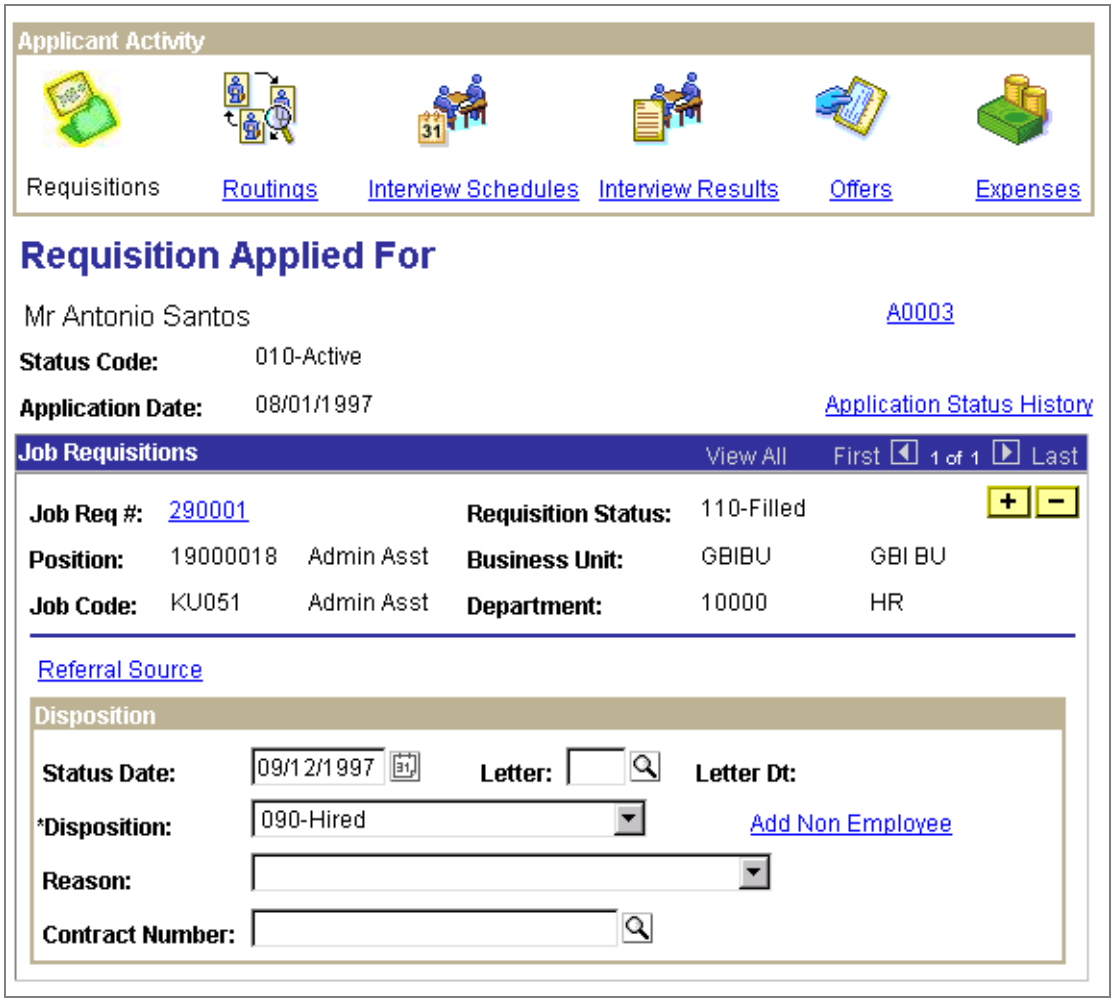
Pages Used to Track Applicants

Page Name	*Object Name*	*Navigation*	*Usage*
Applicant Activity - Requisitions	APP_ACTIVITY_REQNS	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Activity, Requisitions Develop Workforce, Recruit Workforce (USF), Use, Applicant Activity, Requisitions	View the applicant's applications. From here, you can also link the applicant to additional job requisitions.
Referral Source Information	APP_ACT_REFSRC_SEC	Click the Referral Source link on the Applicant Activity - Requisitions page.	View and enter information about how the applicant was referred to your organization.
Applicant Activity - Routings	APP_ACTIVITY_ROUTE	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Activity, Routings Develop Workforce, Recruit Workforce (USF), Use, Applicant Activity, Routings	Record details of the people who reviewed the applicant's information or work samples and their recommendations.
Applicant Activity - Interview Schedule	APP_ACTIVITY_SCHDL	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Activity, Interview Schedule Develop Workforce, Recruit Workforce (USF), Use, Applicant Activity, Interview Schedule	View a list of the interviews that you have scheduled for the selected applicant.
Applicant Activity – Interview Results	APP_ACTIVITY_RSLTS	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Activity, Interview Results Develop Workforce, Recruit Workforce (USF), Use, Applicant Activity, Interview Results	View the interviewers' rating and recommendation.

Page Name	Object Name	Navigation	Usage
Applicant Activity - Offers	APP_ACTIVITY_OFFER	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Activity, Offers Develop Workforce, Recruit Workforce (USF), Use, Applicant Activity, Offers	Enter the details of the applicant's job offers.
Applicant Activity – Expenses	APP_ACTIVITY_EXPS	Applicant Activity – Expenses	Record costs claimed by applicants related to the requisition.

Linking Applicants to Requisitions from Applicant Activity

Access the Applicant Activity – Requisitions page.



Applicant Activity – Requisitions page (1 of 2)

Application Status History Click to access the Application Status History page where you can view a history of the application. The page lists, in chronological order, the application status/reason changes, and the user ID of the person who changed the status.

Referral Source Click to access the Referral Source Information page where you can view and add referral information

Disposition

You do not need to change any of the values in this group box if your organization uses requisition screening and PeopleSoft eRecruit Manager Desktop to process applicants. When you use those transactions, the system automatically updates this information.

Contract Number If you have defined a contract for the applicant, select the contract number.

Recording Routing Information

Access the Applicant Activity - Routings page.



Applicant Activity - Routings page

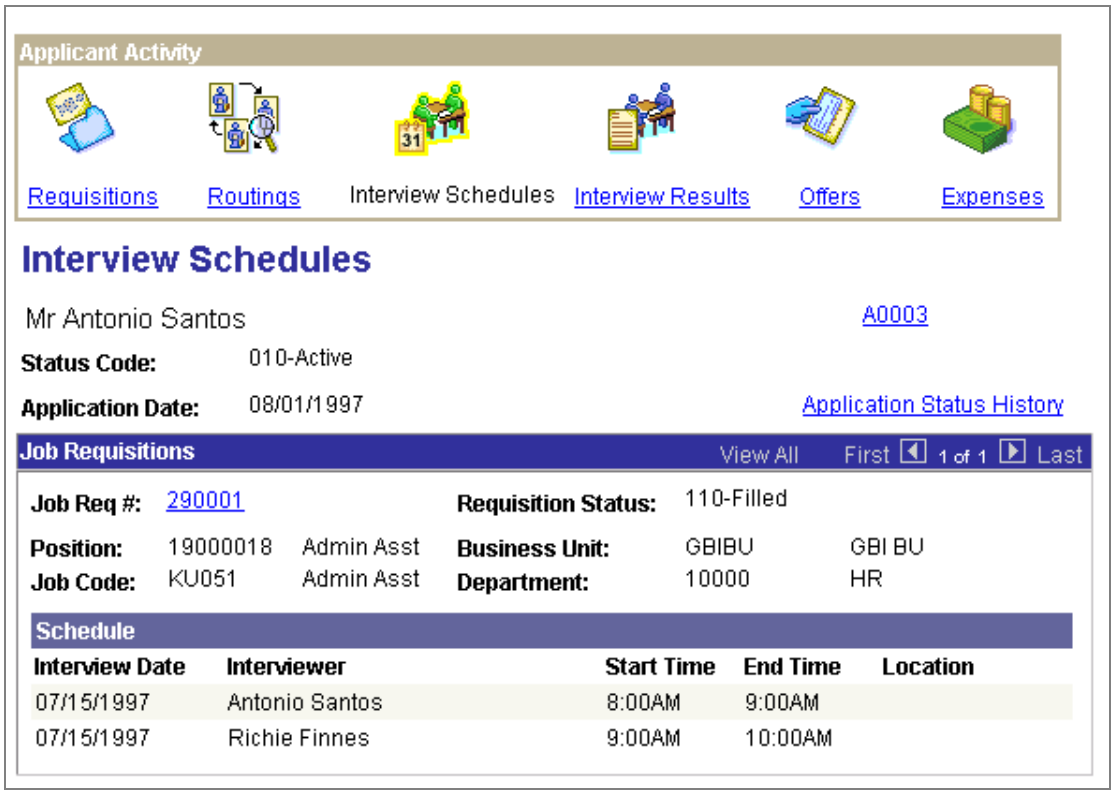
Route to ID The employee ID of the person who will review the application or resume.

Due Date The date when a response is due from the reviewer.

Response Code The reviewer's recommendation and the **Response Date.**

Viewing Interview Schedules

Access the Applicant Activity - Interview Schedule page.



Applicant Activity - Interview Schedule page

The data displayed in the **Schedule** group box is populated from the interview schedule set up for the job requisition.

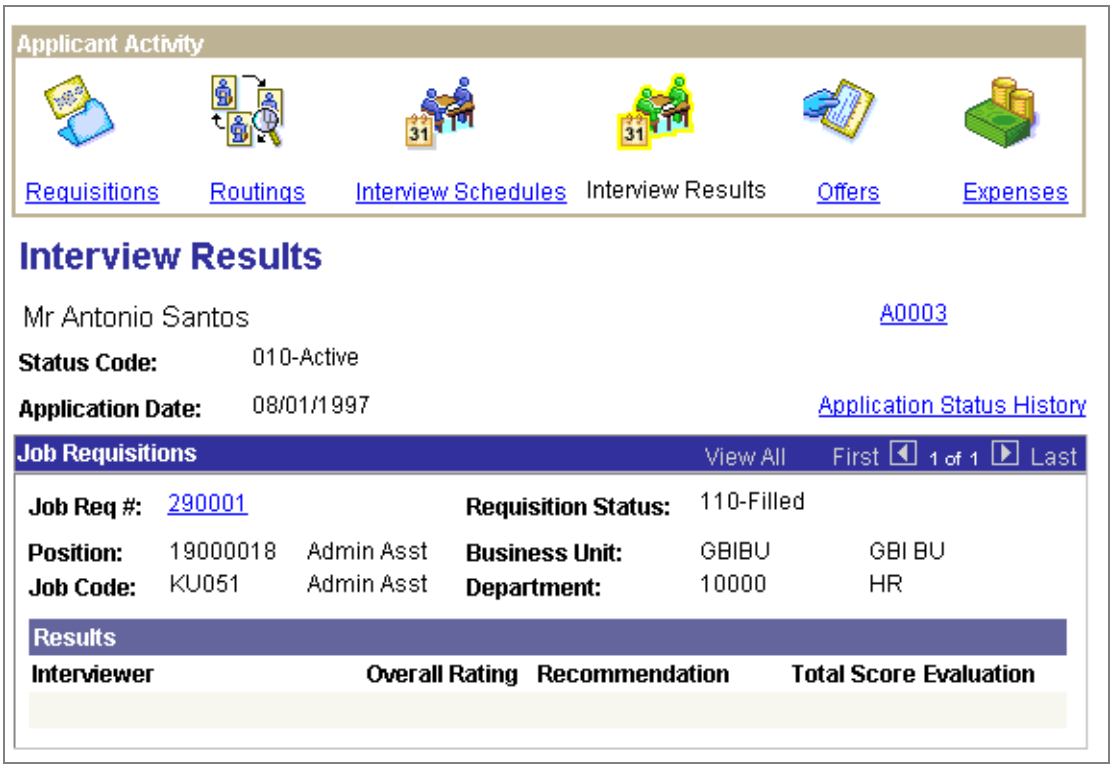
Set up interviews on the Schedule Applicant for Interview page.

See Also

"Organizing Interviews," Scheduling Interviews

Viewing Interview Results

Access the Applicant Activity – Interview Results page.



Applicant Activity – Interview Results page

Interviewer The employee who interviewed the applicant.

Overall Rating The interviewer's rating of the applicant. The rating scale is defined when you create the interview evaluation form. Create forms using the Interview Evaluation Definition page.

Recommendation The interviewer's recommendation. The choice of recommendations is defined when you create the interview evaluation form.

Total Score The applicant's total score. This comes from the interview evaluation forms. For each item evaluated, applicants are awarded a number of points according to the interviewer's rating of the applicant.

Evaluation Click to view the Interview Evaluation form that the interviewer completed.

See Also

"Setting Up Recruit Workforce," Creating Interview Evaluation Forms

Tracking Job Offer Details

Access the Applicant Activity - Offers page.



Applicant Activity - Offers page

Offers

Status

Select an offer status and **Status Reason** from the available options. PeopleSoft deliver the following offer statuses:

010-Extend: You made a job offer, but the applicant hasn't responded.

020-Accept: The applicant accepted the job offer.

030-Acc WD (acceptance withdrawn): The applicant has withdrawn after previously accepting the job offer.

100-Hold: The applicant is on hold.

110-Reject: The applicant rejected your job offer. Select the reason for the rejection.

120-Withdr (withdrawn): The applicant withdrew or is no longer being considered for the requisition.

	For a full history of the changes in offer status, click the **Status** link to access the Offer Status page.
Comments	Click to access the Offer Comments page where you can view a history of comments related to the job offer and add comments.

Offer Details

Add each component of the applicant's job offer, such as base salary, bonus payments, and stock options.

Offer Component	Select the offer component from the options set up on the Offer Component table.
Offer Amount	Enter the amount for the offer component, set the **Currency Code,** and select the **Frequency.**

See Also

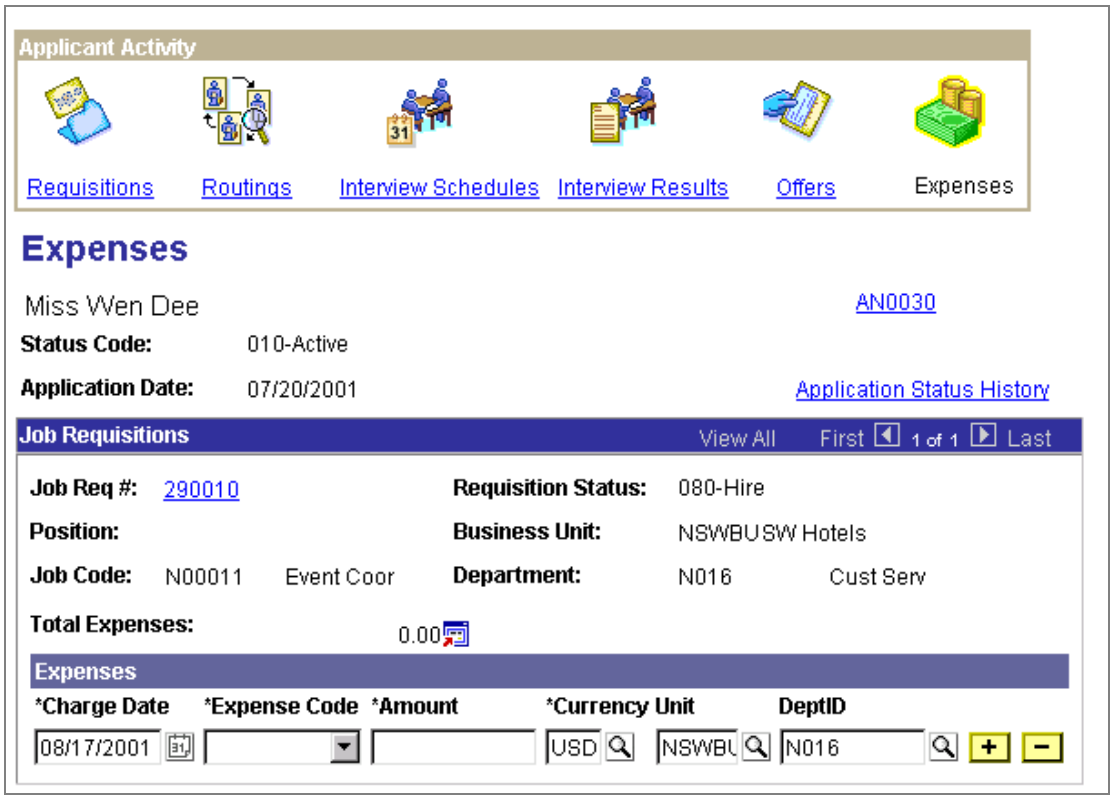
"Setting Up Recruit Workforce," Setting Up Recruitment Status Codes

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Generating Form Letters"

Setting Up Job Offer Components

Entering Applicant Expenses

Access the Expenses page.



Applicant Activity - Expenses page

Charge Date	Enter the date that the expense is charged to the selected **Department.**
Expense Code	Select the type of expense from the available options.
Expense Amount	Enter the expense amount and the **Currency Code.**

Viewing Applicant Status

Use the Applicant Status inquiry to view a history of applicants' job applications. For each job requisition that an applicant has applied for, you can view:

- The applicant's current disposition status and reason.
- The date on which the status changed.
- The person who changed the status.

Pages Used to View Applicant Status

Page Name	Object Name	Navigation	Usage
Application Status History	ER_POSN_STATUS	Develop Workforce, Recruit Workforce (GBL), Inquire, Applicant Status Develop Workforce, Recruit Workforce (USF), Inquire, Applicant Status Click Application Status History on any of the Applicant Activity pages	View the status of an applicant's applications. This page lists all the job requisitions to which the applicant is linked. U.S. Federal users have an additional link to the Applicant Supply File page where they can view the job codes or positions that an applicant is applying for. This page is also accessible from the Applicant Data – Applicant Requisitions page.

Merging Duplicate Applicant Records

It is possible for an applicant to be entered more than once with different applicant IDs. Duplicate applicant records can occur when applicants apply to your organization more than once and send different information each time or submit their applications using different methods. Having the same person referenced with multiple applicant IDs is confusing for hiring managers and recruiters.

To help you identify and merge duplicate applicant records, PeopleSoft Human Resources includes Duplicate Applicant Search, which searches all your applicant records for duplicates.

The system also checks applicant names when you use Requisition Screening. If the system finds applicants with the same first name and last name, it indicates these applicants with a warning symbol.

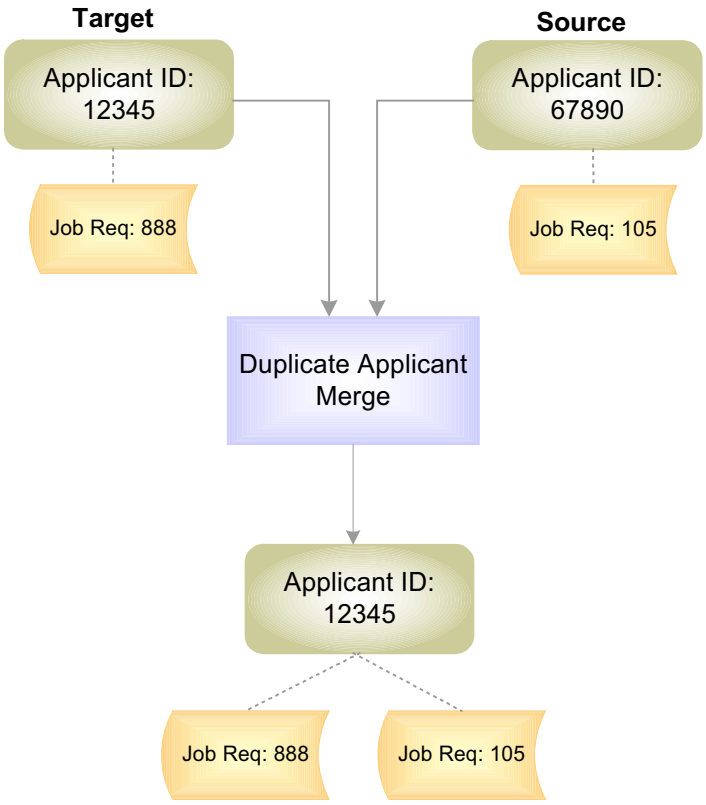
If the user clicks the Route Duplicates for Inspection button, the system adds the highlighted records to the duplicates found. When the administrator displays the Duplicate Summary page, these applicants appear in the list. Once a user routes the applicants to an administrator, the system doesn't display the warning symbols for those applicants.

Note. Users can't merge applicant records directly from Requisition Screening.

What Happens During the Merge Process

The Process Duplicate Applicants process searches the applicant data tables for references to the source applicant and replaces such references with the target applicant ID. The records included in the merge process are defined on the Register Duplicate Applicant Records page.

The following exhibit illustrates how the process affects links to job requisitions.



Outline of Applicant Merge

In the exhibit, the Target and Source applicants are linked to different job requisitions. The merge process transfers the source applicant's requisition link to the target applicant and removes the source applicant (ID 67890) from the system.

Here's how to identify and merge applicant records:

1. Define records to search and merge.
2. Define search criteria.
3. Review search results.
4. View potential duplicates.

   If applicants are duplicated, select the *Target* applicant ID that should remain in the system and the *Source* applicant IDs that should be replaced. The source applicant records are merged into the target applicant record.

   If applicants are not duplicated, mark the applicant IDs as distinct. Once you have marked applicants as distinct, the system doesn't flag the applicants as duplicates when you use Requisition Screening.

5. Run the Process Duplicate Applicants process (ER_DUP_APPS), which merges the duplicate records.

Note. If you select internal applicants (employees and non-employees), the system deletes or modifies the applicant data only. Information held in Personal Data tables is not modified or deleted.

See Also

"Processing Applicants," Screening Applicants

Running the Process Duplicate Applicants Process

Pages Used to Merge Duplicate Applicant Records

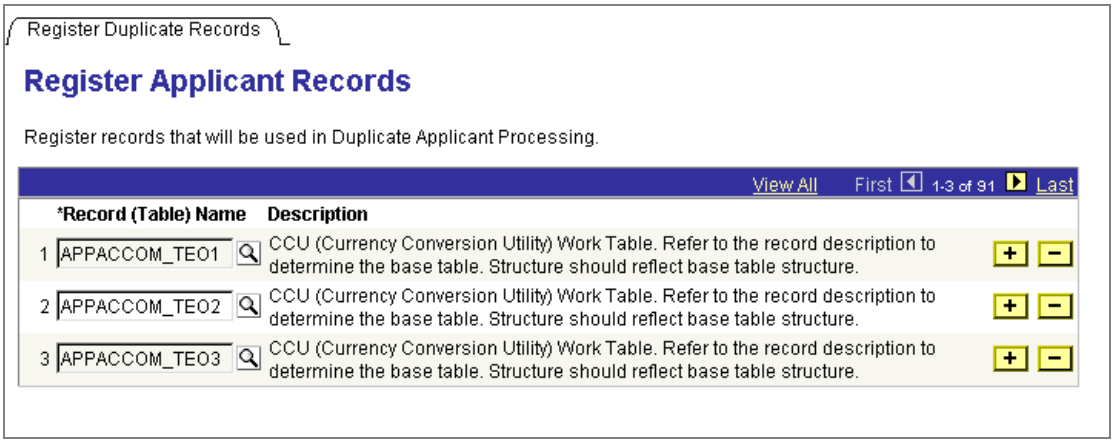
Page Name	*Object Name*	*Navigation*	*Usage*
Register Duplicate Records	ER_DUP_RECORDS	Develop Workforce, Recruit Workforce (GBL), Setup, Register Duplicate App Records Develop Workforce, Recruit Workforce (USF), Setup, Register Duplicate App Records	Define the applicant records that are searched and merged in the Process Duplicate Applicant process. Typically, you do not need to make changes to this page because it is set up for the standard PeopleSoft Human Resources database. However, if you have modified your applicant records you may need to update this page to reflect your modified record structure.

Page Name	*Object Name*	*Navigation*	*Usage*
Duplicate Criteria	DUP_APP_CRITERIA	Develop Workforce, Recruit Workforce (GBL), Process, Duplicate Applicant Search Develop Workforce, Recruit Workforce (USF), Process, Duplicate Applicant Search	Define the search criteria and initiate the duplicate applicant search. You might need to run the Process Duplicate Applicants process before you initiate the applicant search. This is necessary only if you want to rerun a duplicate applicant search with similar criteria.
Duplicate Summary	DUP_APP_SETS_SMRY	Click the Search button on the Duplicate Criteria page.	Review the results of the duplicate applicant search. Compare applicant records and decide if applicants have been duplicated. If an applicant has duplicate records, you can merge the data into one applicant ID that you select.
Duplicate Set Detail	DUP_APP_SETS_DETL	Click the Duplicate Set Detail link on the Duplicate Summary page.	View details of the applicants identified as potential duplicates. If you decide that the applicant records are duplicated, select the target applicant ID that remains in the system and the source applicant IDs that are replaced.

Page Name	Object Name	Navigation	Usage
Process Duplicate Applicants	RUNCTL_DUPAPPLCNT	• Click Process Duplicate Applicants on the Duplicate Summary page. • Develop Workforce, Recruit Workforce (GBL), Process, Process Duplicate Applicants • Develop Workforce, Recruit Workforce (USF), Process, Process Duplicate Applicants	Confirm that the applicant records you selected for merging are correct and start the Process Duplicate Applicants process.

Defining Records to Search and Merge

Access the Register Duplicate Records page.



Register Duplicate Records page

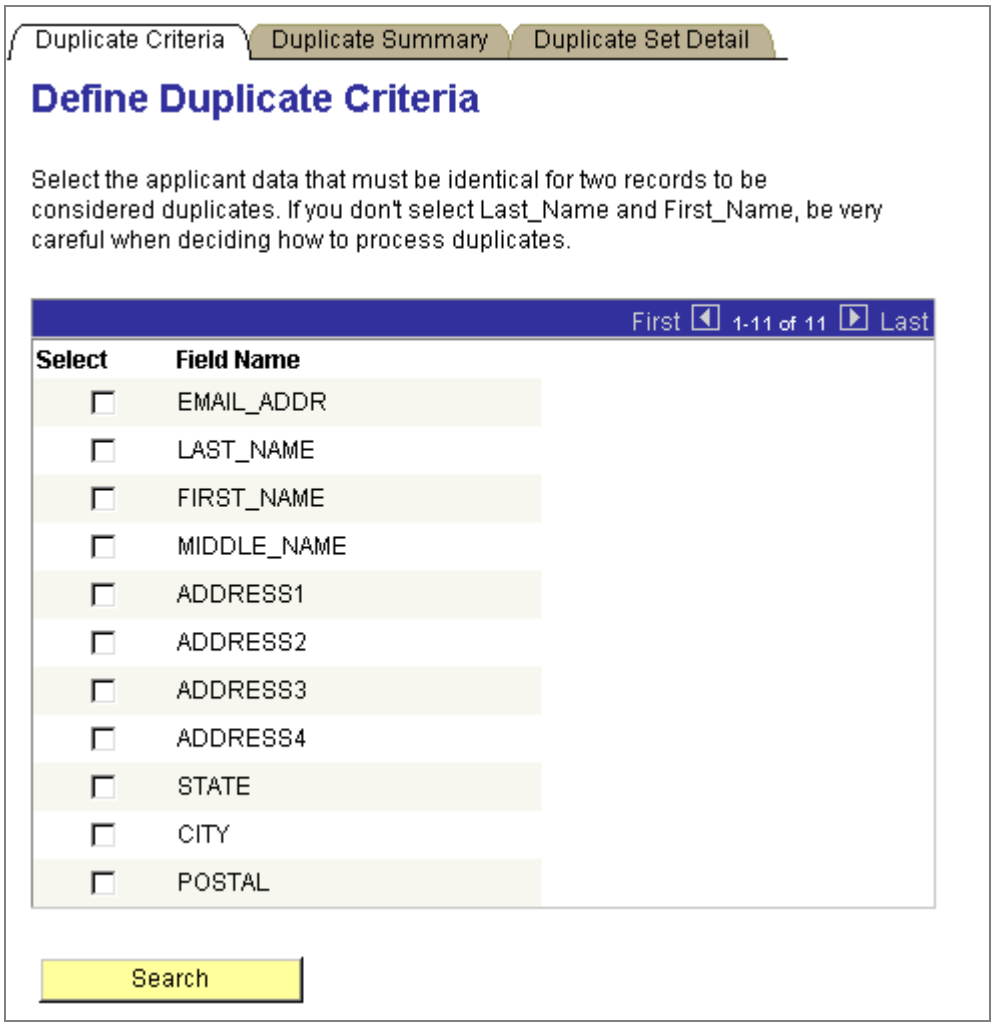
Warning! Changes to this page must be made by technical personnel with an in-depth understanding of the structure of your PeopleSoft Human Resources database. If the Register Duplicate Records page is not set up correctly, there can be data integrity problems when you run the Process Duplicate Applicant process. Always refer to your database administrator before updating this page.

Record (Table) Name Select the table that you want to add from the list of tables

Description The system displays the description of the selected table.

Defining Search Criteria

Access the Duplicate Criteria page.



Duplicate Criteria page

Select the data that must be identical for applicants to be considered as duplicates. When you start the search, the system identifies applicants where all the selected field names are the same.

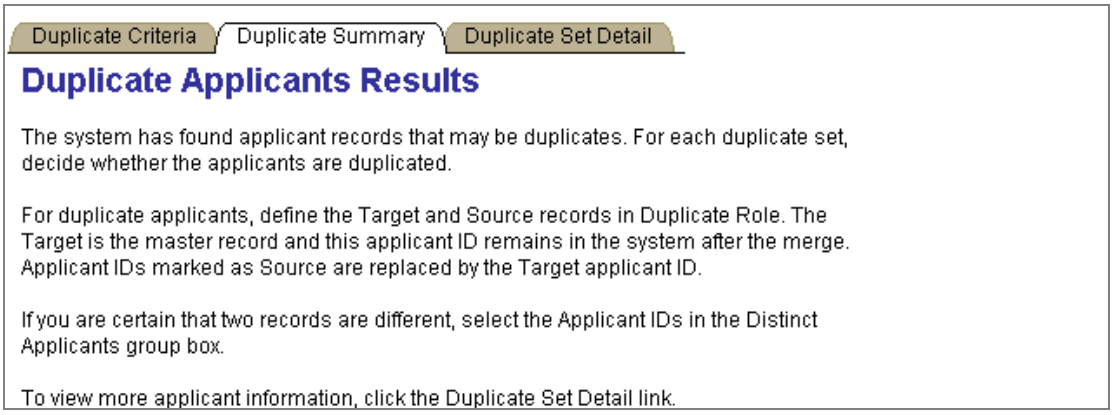
EMAIL_ADDR If you select this check box, the system ignores the email type. This means that if two applicants have the same email address but the email type is different, the system still flags the applicants as potential duplicates.

Search Click to start the search for duplicate applicant records. If the system finds duplicate applicants, it displays the Duplicate Summary page where you decide whether to merge the applicant records.

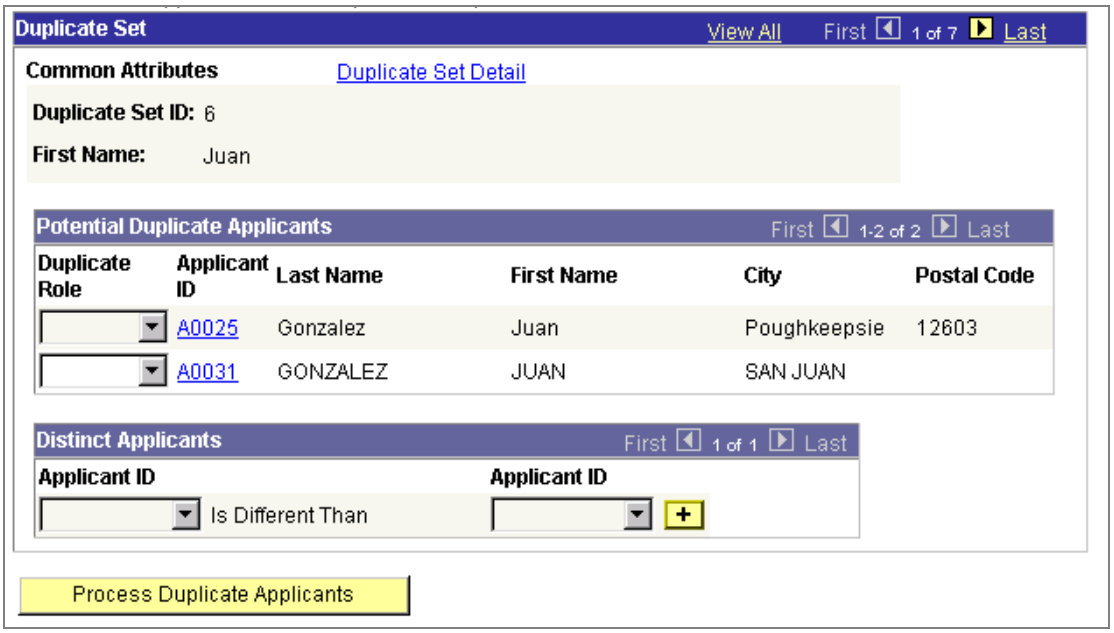
If the system doesn't find any duplicates, it displays an informational message.

Reviewing Search Results

Access the Duplicate Summary page.



Duplicate Summary page (1 of 2)



Duplicate Summary page (2 of 2)

Duplicate Set

Applicants with matching data are grouped in a **Duplicate Set ID.** Review each set and decide if the applicant records are duplicates.

Duplicate Set Detail Click this link to display the Duplicate Set Detail page, where you can compare the applicant information.

Potential Duplicate Applicants

If you decide that applicant records should be merged, use this group box to determine how the records are merged.

Applicant ID — Click to view the applicant data component.

Duplicate Role — Select one of the following values:

Target: The applicant ID that remains in the system after the merge. You can assign only one target applicant ID within a duplicate set.

Source: An applicant ID that is replaced during the merge process by the ***Target*** applicant ID.

If the ***Source*** and ***Target*** applicant IDs have the same application date or effective date, the system displays a warning. Check that the records are duplicates. If you continue with the merge process, the source applicant record will be deleted.

Note. If an applicant ID appears in multiple duplicate sets, the Duplicate Role must be consistent in all the duplicate sets. Therefore, an applicant ID can't be selected as the target in one duplicate set and the source in another duplicate set.

Distinct Applicants

If you decide that applicants are not duplicates, use this group box to select the applicant IDs that are distinct.

The system populates this group box if the results of the duplicate applicant search include applicants that you previously marked as distinct.

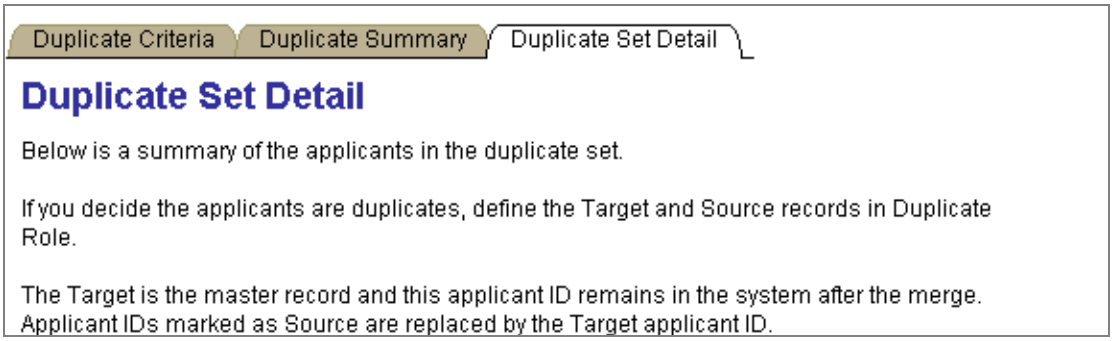
Applicant ID — Select an applicant from the list of applicants in the duplicate set.

Process Duplicate Applicants — Click to start the merge process once you've finishing reviewing the applicants and either marked them as distinct or selected the target and source applicant IDs. When you click this button, the system displays the Process Duplicate Applicants page.

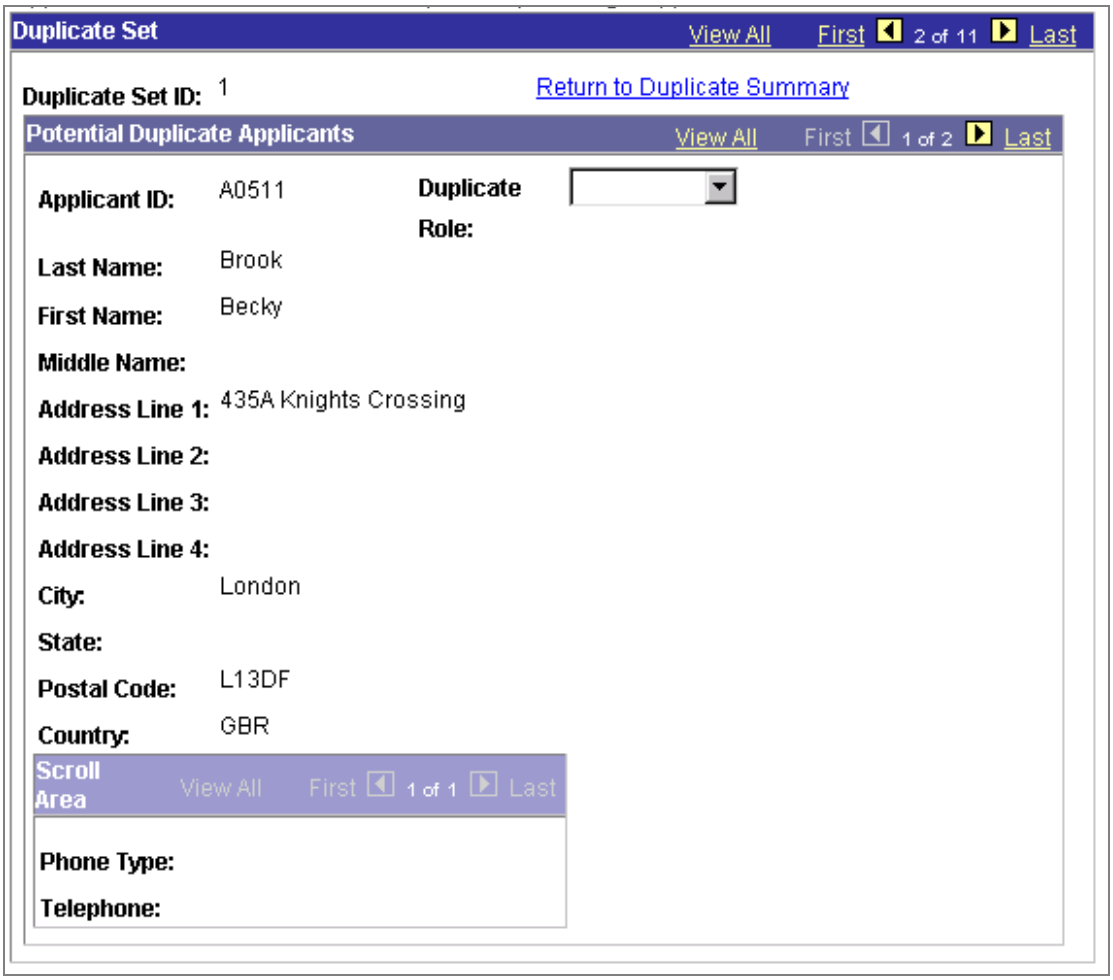
If you don't want to run the merge process now, save the merge information and run the process later.

Viewing Potential Duplicates

Access the Duplicate Set Detail page.



Duplicate Set Detail page (1 of 2)



Duplicate Set Detail page (2 of 2)

Duplicate Set ID The system displays the ID for the group of potential duplicate applicants.

Return to Duplicate Summary Click to return to the Duplicate Summary page.

Potential Duplicate Applicants

The system displays the applicants' contact information.

Duplicate Role If you decide to merge applicant records, use this field to determine how the applicant records are merged.

Select one of the following values:

Target: The applicant ID that remains in the system after the merge.

Source: An applicant ID that is replaced during the merge process by the *Target* applicant ID.

Running the Process Duplicate Applicants Process

The Process Duplicate Applicants process:

- Merges applicant records that you defined as duplicates on the Duplicate Summary page.
- Removes existing duplicate set IDs.

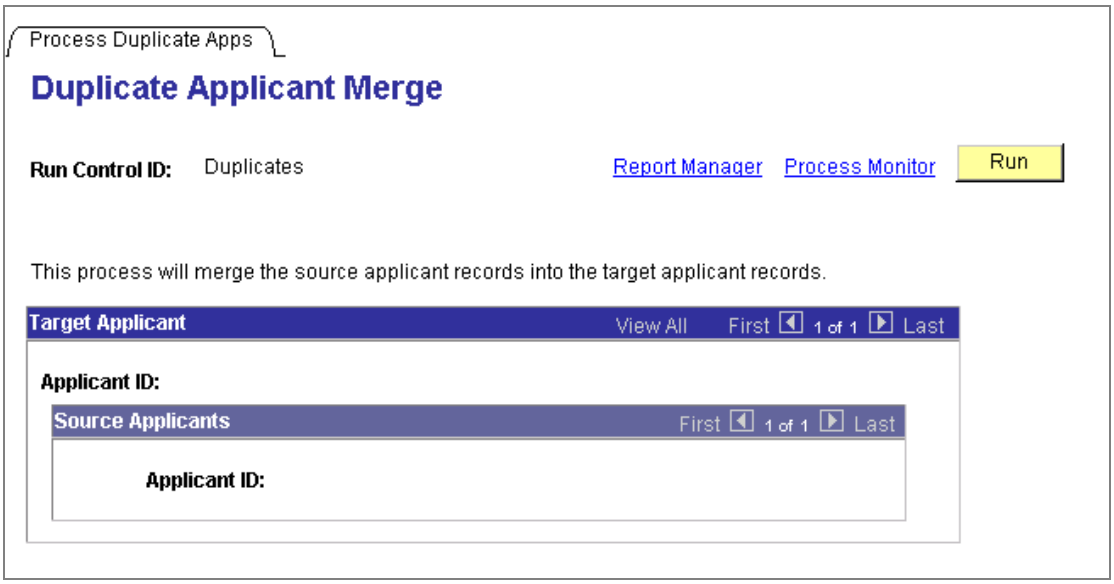
Applicant IDs in duplicate set IDs are unaffected by the removal of duplicate set IDs.

Typically you run this process after you have reviewed the applicants identified as potential duplicates and either marked them as distinct or selected the target and source applicant IDs.

However, you might need to run the process to remove duplicate set IDs even if there are no duplicate applicant records to merge. Removing duplicate set IDs enables you to rerun a duplicate applicant search with similar criteria.

For example, if you search for duplicate applicants and the system returns a large volume of applicants, you might decide to narrow the search. Before you can complete this second search, you must run the Process Duplicate Applicants process to remove the existing duplicate sets. If you don't run the process, the system doesn't create new duplicate set IDs because the applicant IDs are already included in the existing duplicate sets.

Access the Process Duplicate Applicants page.



Process Duplicate Applicants page

The system displays the applicants that you selected as duplicates from the Duplicate Applicant Search component.

Target Applicant

The system displays the **Applicant ID** that you selected as the target ID. The target applicant ID remains in the system after the merge and replaces the source applicant IDs.

Applicant ID — The system displays the ID that you selected as the target ID. The target applicant ID remains in the system after the merge and replaces the source applicant IDs.

Source Applicants

Applicant ID — For each target applicant, the system displays the applicant IDs that you selected as the source IDs.

The system replaces source applicants with the related target Applicant.

Run — Click to start the Process Duplicate Applicants process.

Note. You can run the Process Duplicate Applicants process to remove duplicate set IDs from the system even if there are no target or source applicants to process.

Changing IDs and Deleting Applicants

Applicant ID identifies applicants throughout PeopleSoft Human Resources. To keep accurate records, change or delete applicant IDs; for example, when you enter an applicant ID in error or when you no longer need an ID.

The ID modification process changes the ID in every record where PeopleSoft HRMS uses it. Deleting an ID also deletes all security profiles associated with the ID.

You can delete single or multiple applicant IDs from your system.

This section discusses how to:

- Change applicant IDs.
- Delete applicants.
- Purge old applicant data.

Define which applicants are deleted based on the age of their application. If you want to check who will be deleted from the system, you can generate a report listing the applicants who meet the selected criteria before actually deleting them.

Note. If you select internal applicants (employees and non-employees), the system deletes or modifies the applicant data only. Information held in Personal Data tables is not modified or deleted.

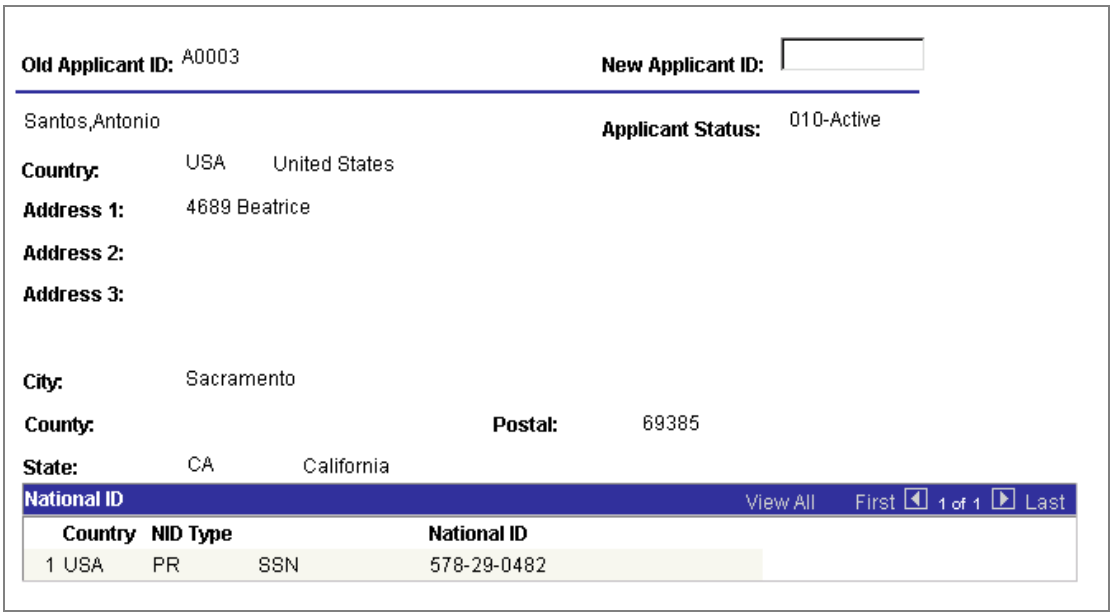
Pages Used to Change and Delete Applicant IDs

Page Name	*Object Name*	*Navigation*	*Usage*
Applicant Id Change	APP_ID_CHANGE	Develop Workforce, Recruit Workforce (GBL), Process, Applicant ID Change, Applicant Id Change Develop Workforce, Recruit Workforce (USF), Process, ID Change, Applicant Id Change	Change an applicant ID.

Page Name	Object Name	Navigation	Usage
Applicant ID Delete	APP_ID_DELETE	Develop Workforce, Recruit Workforce (GBL), Process, Applicant ID Delete, Applicant ID Delete Develop Workforce, Recruit Workforce (USF), Process, ID Delete, Applicant ID Delete	Delete an applicant from your system.
Applicant Purge	APPLICANTS_PURGE	Develop Workforce, Recruit Workforce (GBL), Process, Applicant Purge, Applicant Purge Develop Workforce, Recruit Workforce (USF), Process, Applicant Purge, Applicant Purge	Delete old applicant data from your system. You can delete applicants based on either the Purge Date that you entered in Applicant Data or the applicant's application date.

Changing Applicant IDs

Access the Applicant Id Change page.



Applicant Id Change page

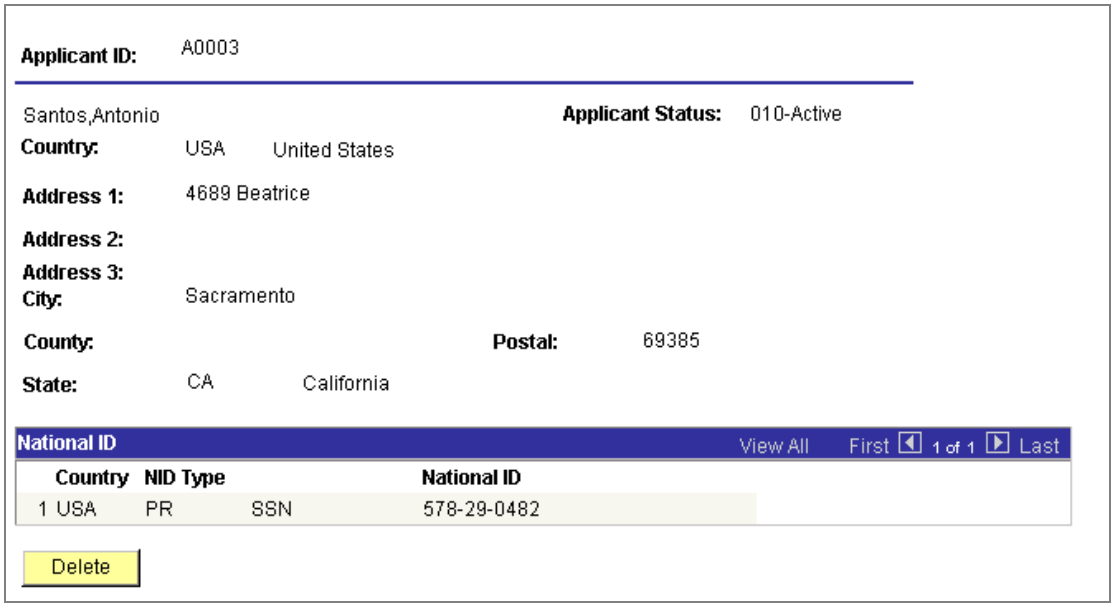
The system displays the applicant ID you entered in **Old Applicant ID.**

The system populates the applicant's address and **National ID** details from Applicant Data, so you can check that you have selected the correct applicant.

When you save the page, the system updates all the applicant's records with the new applicant ID.

Deleting an Applicant

Access the Applicant ID Delete page.



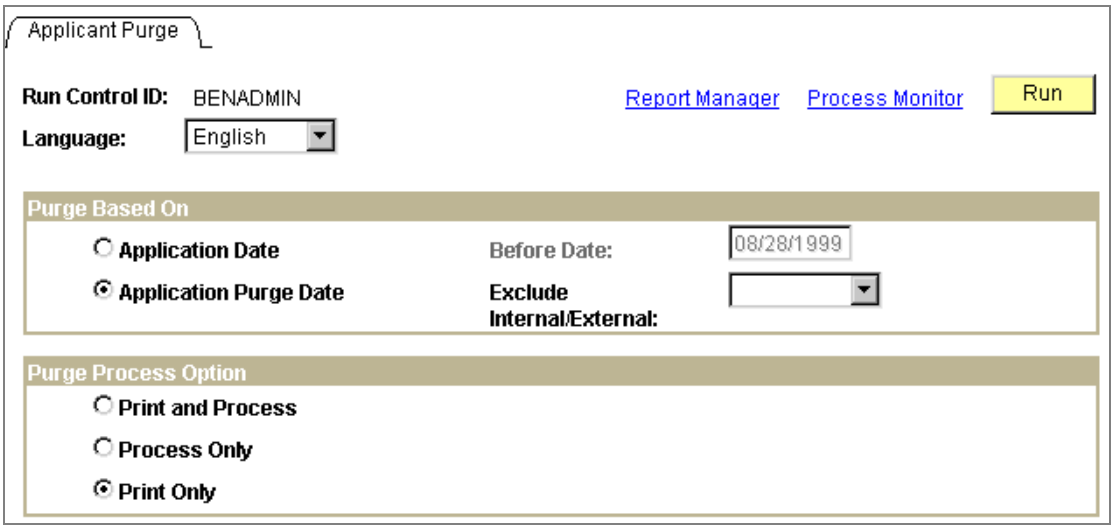
Applicant ID Delete page

The system populates the applicant's address and **National ID** details from Applicant Data, so you can check that you have selected the correct applicant.

Delete Click this button to delete the applicant's records throughout your PeopleSoft Human Resources system.

Purging Applicant Data

Access the Applicant Purge page.



Applicant Purge page

Language Select the **Language** for the report from the available options. If you print a report of the applicants purged, this field determines the language in which the report is generated.

Purge Based On Select from these options to define the criteria for deleting applicants:

Application Date: Select to delete applicants based on the date that the applicant applied to your organization. Applicants whose application date is earlier than the date you enter in **Before Date** are deleted.

Application Purge Date: Select to delete applicants based on the purge date that you entered in the Applicant Data – Applicant Application Info page. The system checks each applicant record and deletes the applicant if the purge date has passed.

Exclude Internal/External If you want to exclude applicants from the purge, select one of the following options:

External: Select to exclude all external applicants from the purge process.

Internal: Select to exclude all internal applicants—employees or non-employees—from the purge process.

Leave this field blank if you want to delete both internal and external applicants.

Purge Process Option Select one of the following options:

Print and Process: Select if you want to purge applicants and generate a report of the applicants deleted from the system.

Process Only: Select this option if you want to purge applicants, without running the report.

Print Only: Select if you want to generate a report of the applicants who meet the purge criteria without actually deleting applicant records. Use this report to check who will be deleted before you run the purge process.

See Also

PeopleTools PeopleBook: Process Scheduler

CHAPTER 7

Processing Applicants

This chapter provides an overview of applicant processing and discusses how to:

- Generate recruitment letters.
- Screen applicants.
- Track requisition activity.
- Search for potential candidates.
- Use checklists to process applicants.

Overview of Applicant Processing

Here's how to select, track, and hire applicants using PeopleSoft Human Resources:

1. Screen applicants for those who meet the basic requirements.

   a. Narrow the applicant list by discounting applicants who do not meet the job requirements. The Requisition Screening feature automates this task. The system compares applicants against the requirements set up in Job Requisition Data and displays only those applicants who meet the requirements.

   b. Select those applicants who go forward to the next stage (routing) and distribute the selected applicants' details to reviewers who consider the applicants in more detail.

   Applicants selected for routing have a disposition of *Route.*

   Note. If you have PeopleSoft eRecruit Manager Desktop installed, Search for Applicants provides an alternative method for screening applicants.

2. Select applicants to interview based on reviewers' recommendations.

   Hiring managers and recruiters enter reviewers' recommendations and select the applicants who go forward to the interview stage using the Select Applicant for Interview self-service transaction. Recruiting administrators can also update applicants' disposition using Applicant Activity or the Applicant Data – Applicant Requisition page.

   Once this stage is complete, the disposition of successful applicants is *Interview.*

3. Schedule and conduct applicant interviews.

   Hiring managers, recruiters, and recruiting administrators schedule interviews and track the interviewers and the applicants being interviewed. Recruiting administrators can view interview schedules for any requisition or applicant. Interviewers and applicants can view their own interview schedule using self-service transactions.

4. Select applicants to receive job offers.

   When interviews are complete, interviewers complete an online interview evaluation form, giving their recommendations. Based on this information, hiring managers or recruiters decide whether to make job offers to applicants.

   Once you've made job offers, the disposition of successful applicants is *Offer*.

   If there are no further openings for the requisition, the disposition of all other applicants who have not been rejected or withdrawn is *On Hold.*

5. Hire applicants who accept job offers.

   Recruiting administrators enter details of job offers made to applicants and their responses on the Requisition Activity - Offers page or Applicant Activity - Offers page. If you have PeopleSoft eRecruit Manager Desktop installed, hiring managers enter job offers using Prepare Job Offer.

   At this stage, applicants may withdraw because they have accepted other offers, reject your job offers, or accept offers. When applicants accept your job offers, their disposition is set to *Ready to Hire*.

   The hire process varies depending on whether the applicant is an external applicant, a non-employee, or employee. Once you've completed the hiring process, the disposition of successful applicants is *Hired.*

   The system changes the disposition of other applicants linked to the requisition from *On Hold* to *Rejected* and the requisition is set to *Filled/Closed* if there are no further openings for that requisition.

Note. The disposition statuses listed above are the values supplied by PeopleSoft for global installations only. Your system may use different values.

See Also

Screening Applicants

PeopleSoft eRecruit Manager Desktop, "Processing Applicants," Searching for Suitable Applicants and "Organizing Interviews"

PeopleSoft eRecruit, "Interview Team Transactions"

"Hiring Applicants"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Generating Form Letters"

Generating Recruitment Letters

With PeopleSoft Human Resources you can implement automated procedures for producing form letters to applicants. PeopleSoft Human Resources merges information automatically and sends it to your Windows-based word processor.

PeopleSoft delivers sample letters for these types of recruitment letters:

- Acknowledgment of receipt of resume.
- No current openings.
- Offer of employment.
- Rejection after interview.

Here's how to generate recruitment letters:

1. Select letter codes on recruitment pages in PeopleSoft Human Resources to designate the applicants to send letters to.

   - Applicant Data – Applicant Application Information page
   - Applicant Data – Requisitions page.
   - Applicant Activity – Offers page.
   - Requisition Activity – Offers page.

   Once you've marked applicant records with letter codes, you can generate form letters at any time, as often or as infrequently as you want to. For example, you might find that generating form letters once a week is sufficient. Or you might generate letters daily, especially if you generate a high volume of letters or require quick responses from letter recipients.

2. Generate form letters containing applicant data.

   - Use an SQR to extract data from PeopleSoft Human Resources and a Word for Windows macro to merge the data into a form letter template.
   - Use the Recruitment Letters Report page to create and print the letters.

3. Print the recruitment letters using Word for Windows.

   The system creates the form letters in a temporary directory on the application server, putting all the letters of the same type in one file.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Generating Form Letters"

Screening Applicants

Use the Requisition Screening component to start the search for suitable applicants to fill a requisition. You can start the screening process when you have all the applicants who applied for a requisition linked to the requisition.

Here's how to screen applicants:

- Review applicants using the Postings page.

This page lists all applicants who applied for the requisition. No screening takes place on this page. It enables you to see how many applicants there are.

- Review preliminary screening results using the Preliminary page.

When you navigate to the Preliminary page, the system compares applicants with the preliminary screen requirements set up on the Job Requisition - Screening Criteria page and lists applicants who meet or exceed those requirements. When you save this page, the system updates the disposition of applicants who pass the screening to *Screened - Preliminary.*

Note. In some countries, discrimination laws require organizations to show that applicant screening is based on published job descriptions. If this applies to your requisitions, set up the preliminary screening criteria to match the advertised job description and do not make changes to the criteria. However, you can adjust the final screening criteria, as necessary, to narrow the applicant list once applicants have passed the preliminary screening stage.

- Review final screening results using the Final page.

When you navigate to the Final page, the system compares applicants with the final screen requirements and lists applicants who meet or exceed those requirements. You select applicants who will go forward to the next stage in the selection process. When you save this page, the system updates the disposition of applicants who pass the screening to *Screened - Final* or *Routing* if you selected the applicants to go on to the next stage.

Adjusting Screening Requirements

On the Final page, if the list of applicants who pass the final screening is too large or too small, you can adjust the screening criteria and rerun the screening to see how this affects the applicant list. Click the Screening Criteria link to navigate to the Job Requisition Data pages where you modify the requirements. When you return to the Final page, the system reruns the screening and refreshes the page with the new list of applicants.

Note. You can continue to change the final screening requirements and rerun the screening as long as you do not save the screening page. Once you save the page, the system updates applicants' dispositions.

Widening the Search for Suitable Applicants

If you are not satisfied with the applicants who have applied for a requisition, you can widen the search for other active applicants who meet the requisition requirements. From the Preliminary and Final pages, you can use the Search All button to search your entire applicant data for applicants who meet the screening criteria but did not apply for the requisition.

See Also

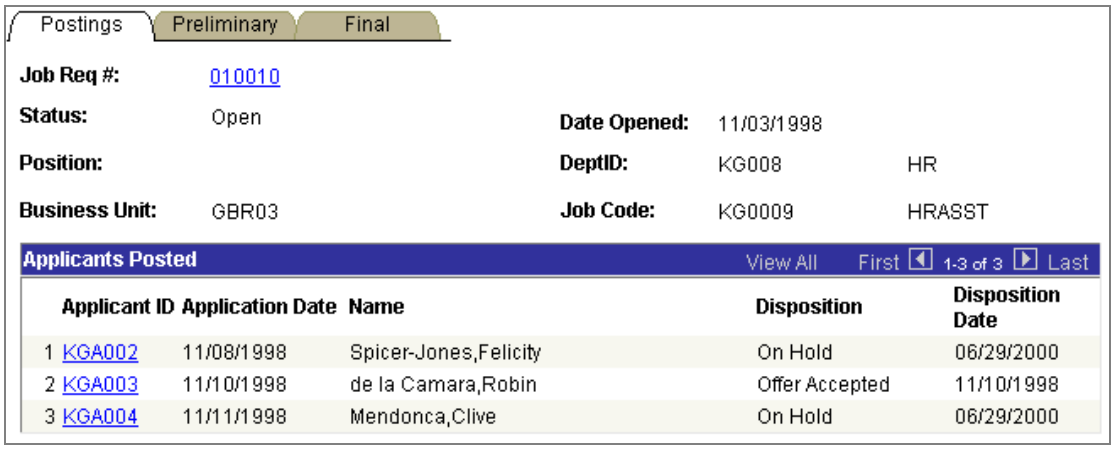
"Administering Job Requisitions," Creating Job Requisitions

Pages Used to Screen Applicants

Page Name	*Object Name*	*Navigation*	*Usage*
Postings	REQ_SCREEN_POSTING	Develop Workforce, Recruit Workforce (GBL), Use, Requisition Screening, Posting	Review the applicants who applied for a given job requisition.
Preliminary	REQ_SCREEN_PRELIM	Develop Workforce, Recruit Workforce (GBL), Use, Requisition Screening, Preliminary Screening	Review the applicants who meet or exceed the preliminary screening criteria.
Requirements Matched	REQ_SCR_CM_SEC	Click Rqmts Met (requirements met) on the Preliminary page or the Final page.	Review the job requirements that the applicant meets.
Final	REQ_SCREEN_FINAL	Develop Workforce, Recruit Workforce (GBL), Use, Requisition Screening, Final Screening	Review the applicants who meet or exceed the final screening criteria, and select applicants for routing.
Route To	REQ_SCR_ROUTE_SEC	Click Route To on the Final page	Enter the names of employees who will review routed applicants' details and dates when responses are due.

Reviewing Applications

Access the Postings page.



Postings page

Applicants Posted

This group box lists the applicants who applied for the requisition or you linked to the requisition.

Applicant ID Click an applicant ID to display the applicant's address, work preferences, and the full resume text.

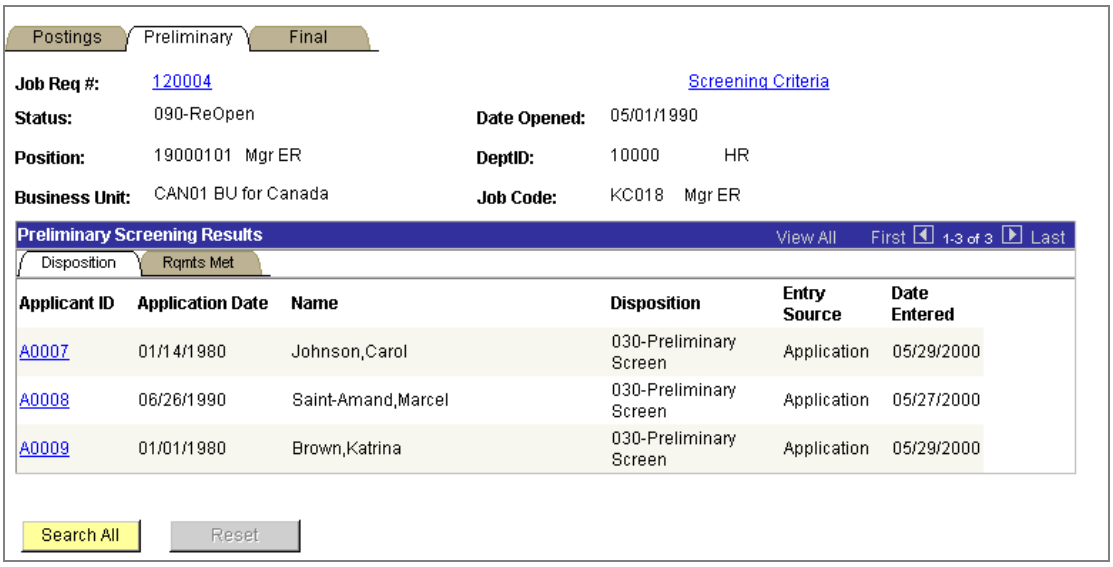
Route Duplicates for Inspection This button appears if the system finds two or more applicants with the same first and last name. The applicants are designated with a warning symbol. Click this button if you want an administrator to check the applicant data and merge duplicate applicants.

See Also

"Managing Applicants," Merging Duplicate Applicant Records

Reviewing Preliminary Screening Results

Access the Preliminary page.



Preliminary page: Disposition tab

Common Page Information

Search All Click to search your entire applicant data table for applicants who meet the preliminary screening criteria that you set up. The system uses the Job Function field to search for applicants who are looking for work in the same function. You specify job function on the Job Code table and on the Applicant Data - Application Data 1 page.

The system updates the list of applicants with additional applicants who meet the screening criteria but did not apply for the requisition.

Reset Click to remove applicants who did not apply for the requisition from the list. This button is available after you click Search All.

Preliminary Screening Results

This group box lists only applicants who meet or exceed the preliminary screening criteria. To view the screening criteria, click the job requisition number to display the Job Requisition Data pages.

Disposition Tab

Referral Source Indicates how the applicant found out about the requisition.

Entry Source The system selects one of these values:

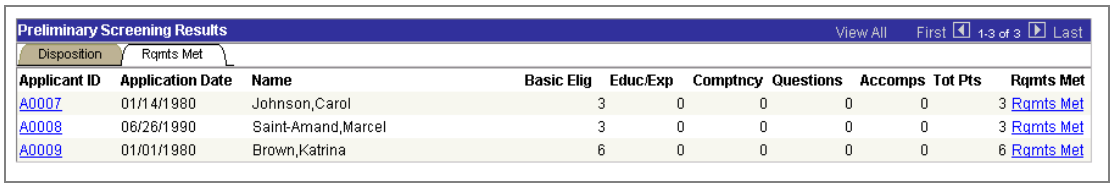
Application: The applicant actively applied for the job. This is the default if you link an applicant to a requisition

from the Applicant Data component or if applicants apply online using the Apply for Job self-service transaction.

Organization: The applicant was linked to the requisition by your organization. If you click Search All to search for additional applicants, the system assigns this value to any applicants linked to the requisition as a result of this search.

Date Entered — The value is the same as the **Application Date** when Entry Source is set to *Application.* If Entry Source is *Organization,* the date entered is the date that the system linked the applicant to the requisition.

Rqmts Met Tab



Preliminary page: Rqmts Met tab

The Rqmts Met (requirements met) tab displays the points awarded to the applicant for **Basic Elig** (basic eligibility), **Educ/Expr** (education/work experience), **Compts** (competencies), **Accomps** (accomplishments), and **Questions** (screening questions).

The points awarded depend on the importance that you assigned to that requirement. For the screening questions, you assign a point value for each possible answer. Assign importance values and points values on the Job Requisition Data - Screening Criteria page.

Tot Pts (total points) — The applicant's total point score.

Rqmts Met (requirements met) — Click to display the Requirements Matched page, where you can see which of the job requirements the applicant meets.

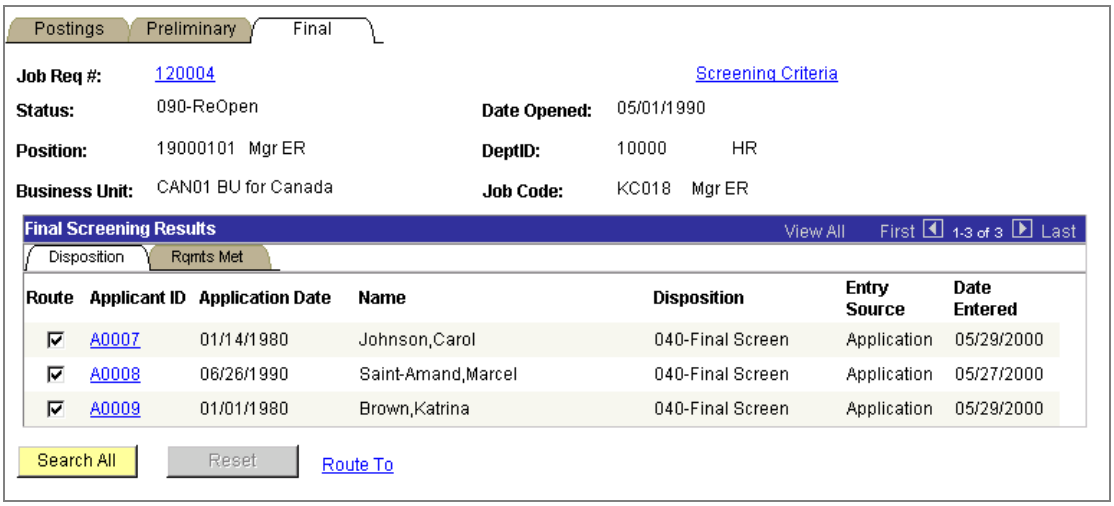
Note. Requisition screening includes screening questions only if you have installed PeopleSoft eRecruit installed.

See Also

"Administering Job Requisitions," Creating Job Requisitions

Reviewing Final Screening Results

Access the Final page.



Final page: Disposition tab

All of the elements on this page are identical to the fields on the Requisition Screening - Preliminary page with the following exceptions:

Final Screening Results This group box lists only applicants who meet or exceed the final screening criteria.

Route When you are satisfied with the list of applicants who pass the final screening, select the applicants who go forward for consideration by selecting this check box.

When you save the page, applicants who are being routed are assigned a disposition of *Route* and the remaining applicants who passed the screening are assigned *Final Screen.*

Route To Click to access the Route To page, where you enter the names of employees who will review routed applicants' details. Hiring managers enter their recommendations using the Select Applicant for Interview self-service transaction.

See Also

PeopleSoft eRecruit Manager Desktop PeopleBook, "Organizing Interviews"

Tracking Requisition Activity

When you've completed screening and narrowed down the applicant list to a manageable size, you can start reviewing remaining applicants in detail.

This section discusses using the Requisition Activity component to:

- View the list of applicants who passed screening.
- View routing information.

- View interview schedules for each applicant.

Recruiting administrators, hiring managers, or recruiters schedule interviews using the Schedule Applicant for Interview page.

- View the results of interviews.

Interviewers submit their evaluation of applicants using the Interview Evaluation Form self-service transaction. From Requisition Activity, you can view each interviewer's overall rating and recommendations.

- Enter job offer information and record applicants' responses to offers.
- Record expenses claimed by applicants.

See Also

"Organizing Interviews"

PeopleSoft eRecruit PeopleBook, "Interview Team Transactions"

"Tracking Recruitment Expenses"

Pages Used to Track Requisition Activity

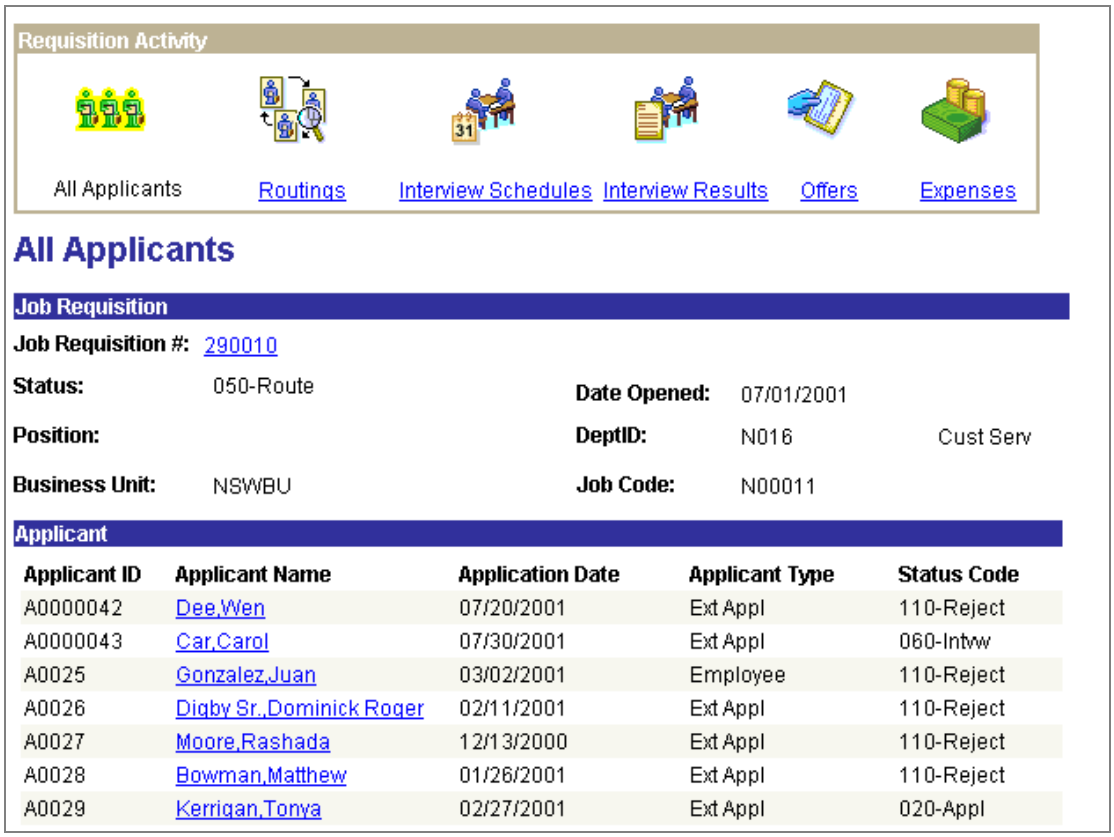
Page Name	*Object Name*	*Navigation*	*Usage*
All Applicants	REQ_ACTIVITY_APPL	Develop Workforce, Recruit Workforce (GBL), Use, Requisition Activity Develop Workforce, Recruit Workforce (USF), Use, Requisition Activity	Review the status of applicants who applied for the job requisition.
Routings	REQ_ACTIVITY_ROUTE	Develop Workforce, Recruit Workforce (GBL), Use, Requisition Activity, Routings Develop Workforce, Recruit Workforce (USF), Use, Requisition Activity, Routings	View the list of applicants whose details were routed to reviewers for consideration. View details of the reviewers and their recommendations.

Page Name	Object Name	Navigation	Usage
Interview Schedules	REQ_ACTIVITY_SCHDL	Develop Workforce, Recruit Workforce (GBL), Use, Requisition Activity, Interview Schedules Develop Workforce, Recruit Workforce (USF), Use, Requisition Activity, Interview Schedules	View a list of applicants invited for interviews and details of the interviews scheduled for each applicant.
Interview Results	REQ_ACTIVITY_RSLTS	Develop Workforce, Recruit Workforce (GBL), Use, Requisition Activity, Interview Results Develop Workforce, Recruit Workforce (USF), Use, Requisition Activity, Interview Results	View the results of interviews. For each applicant, you can view the interviewers' rating and recommendation.
Offers	REQ_ACTIVITY_OFFER	Develop Workforce, Recruit Workforce (GBL), Use, Requisition Activity, Offers Develop Workforce, Recruit Workforce (USF), Use, Requisition Activity, Offers	View applicants who received a job offer. Enter the details of the applicants' job offers.
Offer Comments	ER_OFFER_COMMENTS	Click the Comments link on the Offers page	View the history of the comments related to the job offer. For example, you might use it to track contact with the applicant, such as the date that the contract is sent or discussions with the applicant.
Offer Status	ER_OFFER_STATUS	Click the Status link on the Offers page	View the history of the job offer.

Page Name	Object Name	Navigation	Usage
Expenses	REQ_ACTIVITY_EXPS	Develop Workforce, Recruit Workforce (GBL), Use, Requisition Activity, Expenses Develop Workforce, Recruit Workforce (USF), Use, Requisition Activity, Expenses	Record costs claimed by applicants related to the requisition.

Viewing All Applicants

Access the All Applicants page.



All Applicants page

Job Requisition Click to access the Job Requisition Summary page, where you can view all details of the job requisition.

Applicant This group box lists the status of all applicants who are linked to the job requisition. This includes applicants who

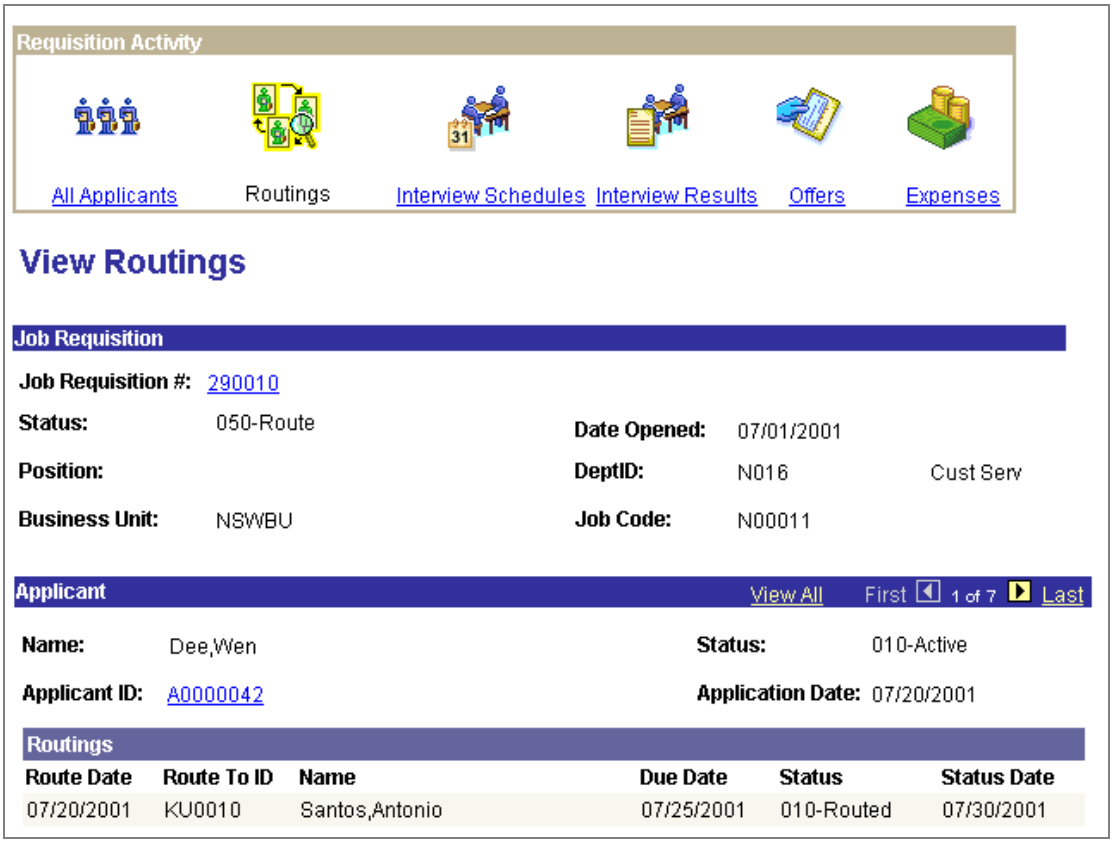
have specifically applied for the requisition and applicants that you have identified as suitable for the requisition.

See Also

"Administering Job Requisitions," Creating Job Requisitions

Reviewing Routing Information

Access the Routings page.



Routings page

Route To ID The employee who reviewed the applicant's information.

Due Date The date by which the reviewer should respond with a recommendation.

Status The route status.

Reviewing Interview Schedules

Access the Interview Schedules page.



Interview Schedule page

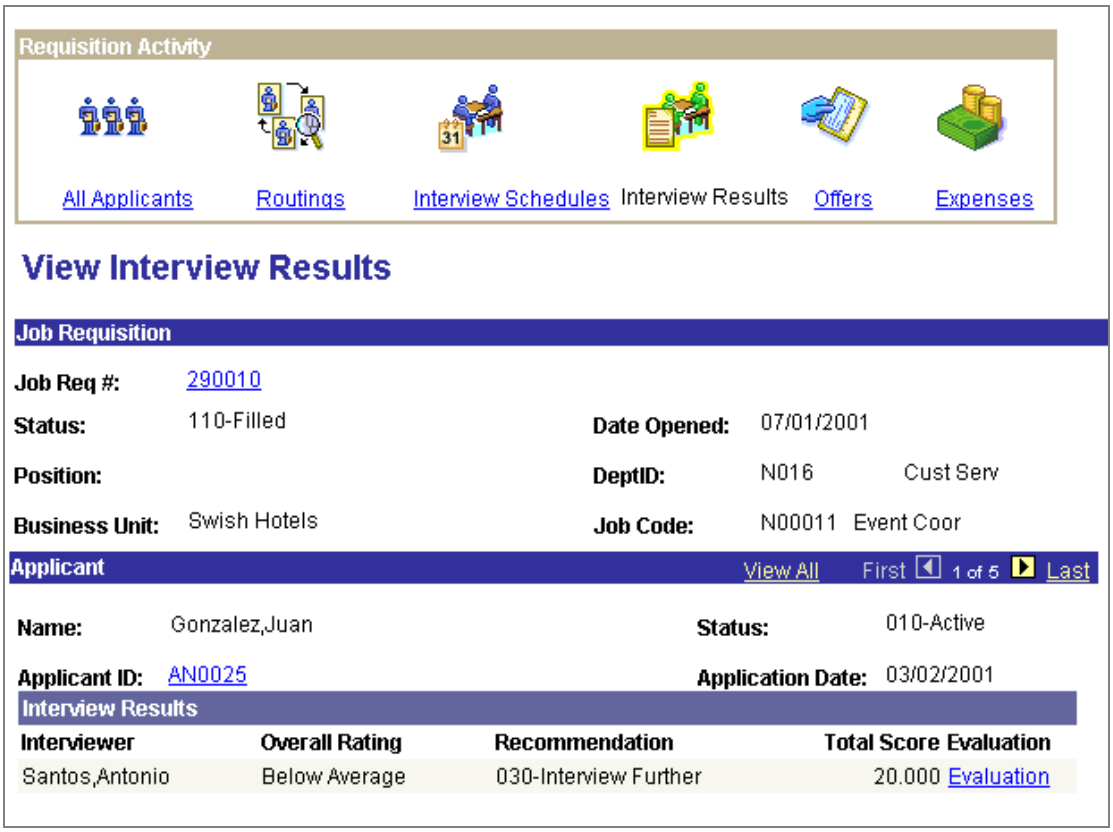
For applicants selected for interview, the system displays the date and time of their interviews.

See Also

"Organizing Interviews," Scheduling Interviews

Viewing Interview Results

Access the View Interview Results page.



View Interview Results page

Interviewer The employee who interviewed the applicant.

Overall Rating The interviewer's rating of the applicant. The rating scale is defined when you create the interview evaluation form. Create forms using the Interview Evaluation Definition page.

Recommendation The interviewer's recommendation. The choice of recommendations is defined when you create the interview evaluation form.

Total Score The applicant's total score. This comes from the interview evaluation forms. For each item evaluated, applicants are awarded a number of points according to the interviewer's rating of the applicant.

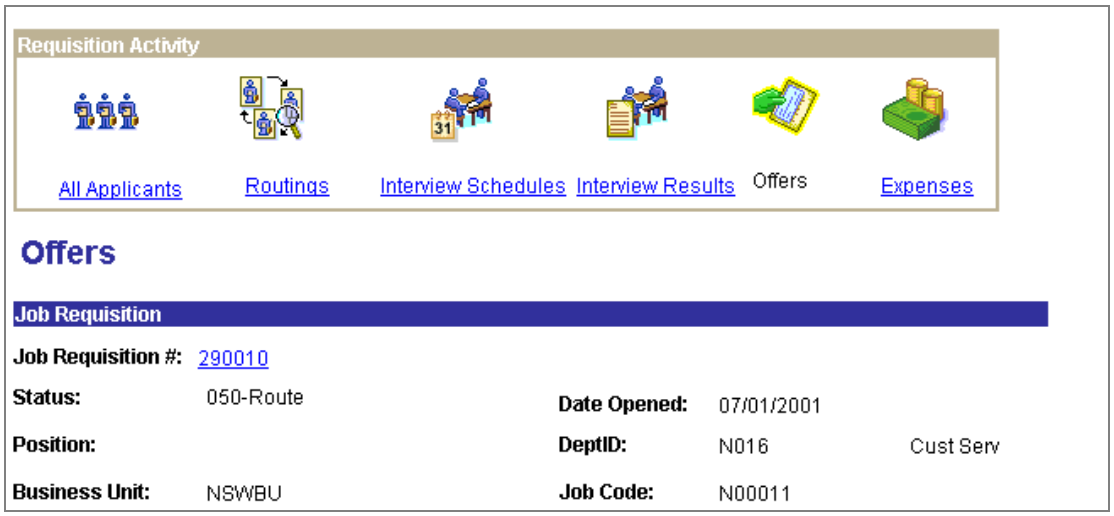
Evaluation Click to view the Interview Evaluation form that the interviewer completed.

See Also

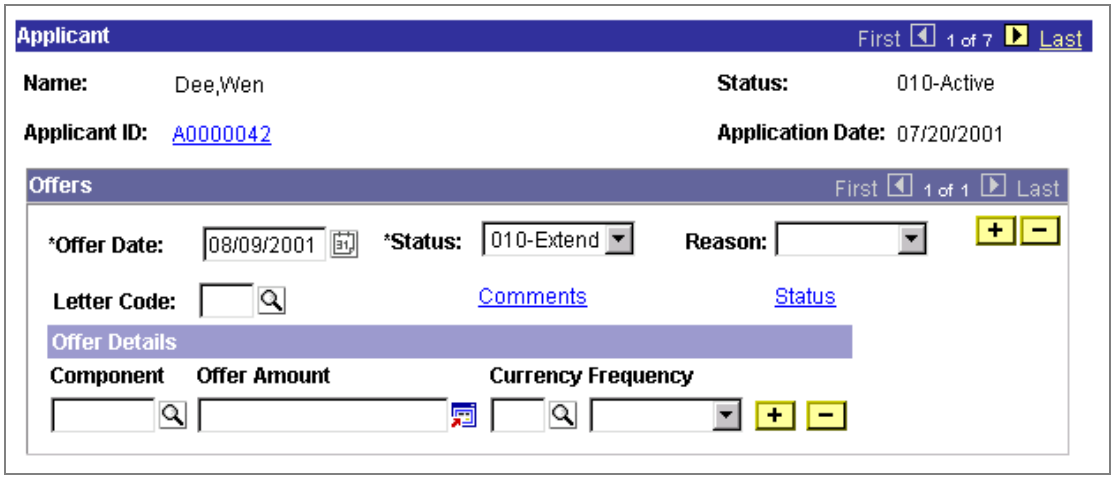
"Setting Up Recruit Workforce," Creating Interview Evaluation Forms

Entering Job Offers

Access the Offers page.



Offers page (1 of 2)



Offers page (2 of 2)

Offers

Status

Select an offer status and **Status Reason** from the available options. PeopleSoft deliver the following offer statuses:

010-Extend: You made a job offer, but the applicant hasn't responded.

020-Accept: The applicant accepted the job offer.

030-Acc WD (acceptance withdrawn): The applicant has withdrawn after previously accepting the job offer.

100-Hold: The applicant is on hold.

110-Reject: The applicant rejected your job offer. Select the reason for the rejection.

120-Withdr (withdrawn): The applicant withdrew or is no longer being considered for the requisition.

For a full history of the changes in offer status, click the **Status** link to access the Offer Status page.

Letter Code Select a letter code to generate a form letter. The standard codes supplied by PeopleSoft for use on this page are *OF1* and *OF2*. These codes generate job offer letters.

Define letter codes in the Standard Letter Table.

Comments Click to access the Offer Comments page, where you can view a history of comments related to the job offer and add comments.

Offer Details

Add each component of the applicant's job offer, such as base salary, bonus payments, and stock options.

Offer Component Select the offer component from the options set up on the Offer Component Table.

Offer Amount Enter the amount for the offer component, set the **Currency Code,** and select the **Frequency.**

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Generating Form Letters"

"Setting Up Recruit Workforce," Setting Up Recruitment Status Codes

"Managing Applicants," Setting Up Job Offer Components

Entering Applicant Expenses

Access the Expenses page.



Requisition Activity - Expenses page

Charge Date Enter the date that the expense is charged to the selected **Department.**

Expense Code Select the type of expense from the available options.

Expense Amount Enter the expense amount and the **Currency Code.**

Using Checklists to Process Applicants

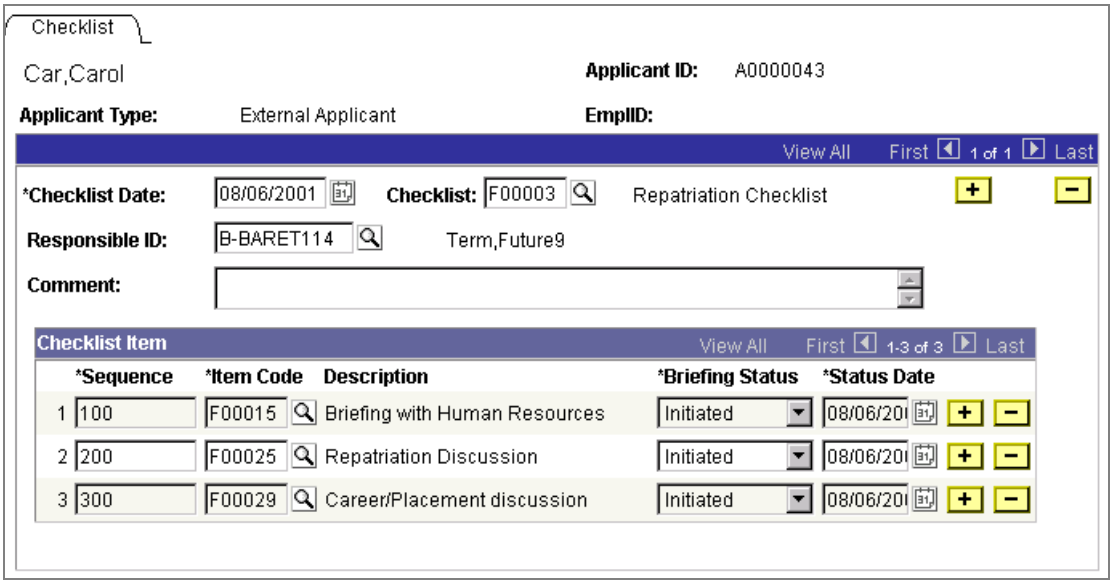
A checklist helps you remember all the details you need to get applicants through the recruiting process. You can use standard lists that you create in the Checklist Table or create an individualized checklist for a particular applicant for whom you're processing recruitment activities.

Page Used to Modify Checklists

Page Name	*Object Name*	*Navigation*	*Usage*
Checklist	APP_CHECKLIST	Develop Workforce, Recruit Workforce (GBL), Use, Checklist, Checklist Develop Workforce, Recruit Workforce (USF), Use, Applicant Checklist, Checklist	Modify a checklist for a particular applicant.

Modifying Checklists

Access the Checklist page.



Checklist page

The fields on this page are the same as those on the Checklist page accessed from the Administer Workforce business process.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Setting Up the Administer Workforce Business Process," Creating Checklists

CHAPTER 8

(USF) Processing Applicant Qualifications

This chapter provides an overview of applicant processing for U.S. Federal Government installations and discusses how to:

- Run the priority placement and basic eligibility processes.
- Identify applicants who meet minimum qualifications.
- Rate, evaluate, and rank your qualified applicant pool.
- Review applicant ranking.
- Create a Certificate of Eligibles report.
- Update applicant disposition.
- Track requisition activity.

Understanding Applicant Processing

Here's how U.S. Federal government installations select, track, and hire applicants using PeopleSoft Human Resources:

1. Screen applicants for those who meet the basic requirements.

    a. Search for applicants in your agency Priority Placement programs.

    b. Narrow the applicant list by discounting applicants who do not meet the job requirements. The Basic Eligibility process determines whether the applicants' employment preferences match the employment conditions of the job.

    c. Select those applicants who meet minimum qualifications and go forward to the next stage. The selected applicants' details are distributed to reviewers who consider the applicants in more detail.

    d. Applicants who are considered "Qualified" are rated and ranked, and placed on the referral list known as the "Certificate of Eligibles".

    After this stage is complete, the disposition of successful applicants is *Route.*

2. Select applicants to interview based on reviewers' recommendations.

Hiring managers and recruiters enter reviewers' recommendations and select the applicants who go forward to the interview stage using the Select Applicant for Interview self-service transaction. Recruiting administrators can also update applicants' disposition using Applicant Activity or the Applicant Data – Applicant Requisition page.

After this stage is complete, the disposition of successful applicants is *Interview.*

3. Schedule and conduct applicant interviews.

   Hiring managers, recruiters, and recruiting administrators schedule interviews and track the interviewers and the applicants being interviewed. Recruiting administrators can view interview schedules for any requisition or applicant. Interviewers and applicants can view their own interview schedule using self-service transactions.

4. Select applicants to receive job offers.

   When interviews are complete, interviewers complete an online interview evaluation form, giving their recommendations. Based on this information, hiring managers or recruiters decide whether to make job offers to applicants.

   When you've made job offers, the disposition of successful applicants is *Offer.*

   If there are no further openings for the requisition, the disposition of all other applicants who have not been rejected or withdrawn is *On Hold.*

5. Hire applicants who accept job offers.

   Recruiting administrators enter details of job offers made to applicants and their responses on the Requisition Activity - Offers page or Applicant Activity - Offers page. If you have PeopleSoft eRecruit Manager Desktop installed, hiring managers enter job offers using Prepare Job Offer.

   At this stage, applicants may withdraw because they have accepted other offers, reject your job offers, or accept offers. When applicants accept your job offers, their disposition is set to *Ready to Hire*.

   The hire process varies depending on whether the applicant is an external applicant, a non-employee, or employee. Once you've completed the hiring process, the disposition of successful applicants is *Hired.*

   The system changes the disposition of other applicants linked to the requisition from *On Hold* to *Rejected* and the requisition is set to *Filled/Closed* if there are no further openings for that requisition.

See Also

"Organizing Interviews"

PeopleSoft eRecruit Manager Desktop PeopleBook, "Organizing Interviews"

PeopleSoft eRecruit PeopleBook, "Interview Team Transactions"

"Processing Applicants," Tracking Requisition Activity

"Hiring Applicants"

"Processing Applicants," Generating Recruitment Letters

Standard Terms

These page elements are used throughout this chapter.

	Click the Category Description button to access the Category Description page and view descriptions of the ranking categories.
Process Request	Click to run a process request. Process Scheduler runs the selected processes at user-defined intervals.
Letter Code	Select a code from the values that you created in the Standard Letter Table to generate a letter to the applicant. When you generate the letter, the system displays the date that the letter was printed.
Details	Click to access the Details – Candidates page, which provides further information about each applicant.
Sort By	On several pages you can change the order in which applicants are listed by clicking buttons, such as **Applid (A)** (applicant ID ascending), **Name (A)** (ascending), **Score** (Descending), or **Rank (D)** (descending).
Primary	This check box is selected if this is the primary job code for the job requisition.

See Also

"Processing Applicants," Generating Recruitment Letters

Running Priority Placement and Basic Eligibility Processes

Candidates whose priority consideration rights are identified have special placement privileges granted. Running the priority placement process prompts the system to search all open job requisitions and identify applicants with priority placement codes.

Running the basic eligibility process prompts the system to recognize only those applicants who meet the Recruiting Type determination. For example, for a job requisition with a Recruiting Type of *Internal,* the system does not recognize and recommend an applicant who is applying from the private sector. Other factors that can be used for screening include citizenship, gender, and minimum/maximum age limits. Salary considerations and part-time/full-time employment may also be defined as basic requirements for this qualification process.

This section discusses how to:

1. Identify applicants who are entitled to priority placement considerations.
2. Identify applicants who meet the minimum requirements of a specific job requisition.

Understanding Priority Placement and Basic Eligibility Processes

Priority Placement Considerations

Priority placement identifies preferred eligibles: candidates who should get special consideration in the selection process because of a specific situation with a current or previous job. For example, an employee who has been displaced during a reduction in force.

The priority placement process also functions when an applicant has two priority placement codes for a particular job and only one priority placement code method can be considered for that job series. In this case, the process determines which code should be used. This determination is based on the recruiting type code that you set up based on agency-specific requirements.

Important! In order for the system to perform as described, you must run the priority placement process *before* running the basic eligibility process in order to identify preferred eligibles or candidates with more than one priority placement code.

Basic Eligibility Requirements

All candidates, whether they are preferred eligibles or not, must go through the basic eligibility process. This process identifies basic requirements for the job, such as full-time or part-time, regular or temporary, as well as citizenship, gender, age limitations, or salary limitations. The job requisition is based on a specific job code, and specifies the requirements for basic eligibility. The basic eligibility process then compares these requirements to the applicant's choices. It eliminates candidates for whom the requirements of the job requisition and the applicant preferences don't match, and identifies candidates whose preferences match.

Multiple Applications

Applicants can apply for more than one position, job requisition, or job code, and may be eligible for different job series. In this case, their basic eligibility and job requirements are compared to the specific job code, requisition, or positions for which they applied.

For example, a job requisition may contain two job codes: job code A and job code B. An applicant applying for that job requisition is considered for all job codes within that requisition. Suppose, for example, that the applicant prefers regular, full-time employment. One of the employment conditions for job code A is full-time regular. For job code B, the employment condition is part-time temporary.

If the applicant does not meet basic eligibility for any job code in that requisition, the disposition code is appropriately set and the applicant is not considered further.

When the basic eligibility program is run:

- Disposition is set to *Preliminary Screen* for job code A.
- Disposition is set to *Reject* and reason is set to *Ineligible – Basic Eligibility* for job code B.

The employee is considered further for job code A but not for job code B.

Pages Used in Priority Placement and Basic Eligibility Processes

Page Name	*Object Name*	*Navigation*	*Usage*
Priority Placement	RUNCTL_PRIO_PLCMNT	Develop Workforce, Recruit Workforce (USF), Process, Priority Placement, Priority Placement	Run the process that identifies applicants who have been given priority placement considerations. The priority placement process prompts the system to search all open job requisitions and identify applicants who qualify for priority consideration by running the FGPRI_PL process.
Basic Eligibility	RUNCTL_BASIC_ELIG	Develop Workforce, Recruit Workforce (USF), Process, Basic Eligibility, Basic Eligibility	Identify applicants who meet the minimum requirements for a job vacancy by running the FGBAS_EL process.

Identifying Applicants Who Meet Minimum Qualifications

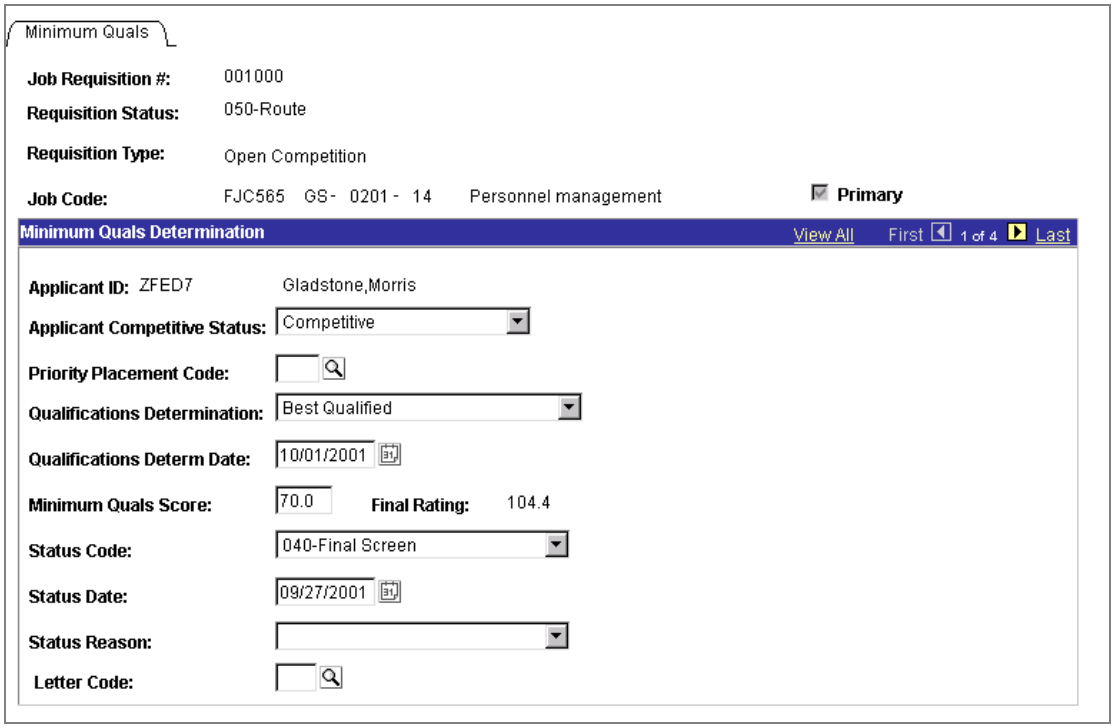
Qualifications standards are published and maintained by the Office of Personnel Management (OPM), or in the absence of an OPM standard, the specific agencies. The qualification standards outline the minimum general and special experience requirements deemed necessary for a candidate to successfully perform the duties of the job. These competencies and accomplishments are rated in order to determine a candidate's probability of success in performing a job.

Pages Used to Identify Applicants Who Meet Minimum Qualifications

Page Name	*Object Name*	*Navigation*	*Usage*
Minimum Quals (minimum qualifications)	GVT_MIN_QUALS_DET	Develop Workforce, Recruit Workforce (USF), Use, Minimum Quals Determination, Minimum Quals Determination	Review the qualifications for each candidate associated with the job requisition to determine whether they meet the minimum qualifications. You can enter the results of the applicant's competitive status and priority placement validation.

Reviewing Applicant Qualifications

Access the Minimum Quals page.



Minimum Quals page

Applicant Competitive Status Select a value from the available options: *Competitive, Non-Competitive Other, Non-Competitive VRA,* and *(none).*

Priority Placement Code For this field to be active, the applicant must have indicated that they are entitled to priority placement

	consideration on their application. You define the values in the Priority Placement Table.
Qualifications Determination	Select *Qualified* or *Does Not Meet Minimum Qualifications.* If the applicant does not meet minimum qualifications, the **Status Code** is set to *Reject* and **Status Reason** is updated to *Not Selected.* An applicant must meet all minimum qualifications and all selective factors to be considered qualified.
Minimum Quals Score	This field is populated with information defined on the Federal Screening Criteria page.

See Also

"Administering Job Requisitions", (USF) Entering Federal Screening Criteria

Rating Applicants

Because the determination of basic eligibility and minimum qualifications is partially subjective, use the Applicant Rating component to apply an objective process of rating your applicant and determine how well an applicant is suited to the position and job requirements.

Only applicants whose Qualifications Determination is *Qualified,* and have the Status of Preliminary Screen appear in the rating process. All applicants who pass priority placement, basic eligibility, and minimum qualifications appear in the Applicant Rating component. Use this component to compare an applicant's application against a standard set of criteria that you defined on the Federal Screening Criteria page, including quality ranking factors and augmenting factors. These criteria are then consolidated into a single overall score for each applicant which is used to determine well-qualified and best-qualified applicants.

In this section we discuss how to:

1. Assign ratings and points for competencies.

   You defined the rating and points associated with each competency on the Proficiency Descrs (proficiency description) page in Manage Competencies.

2. Assign points for accomplishments.

See Also

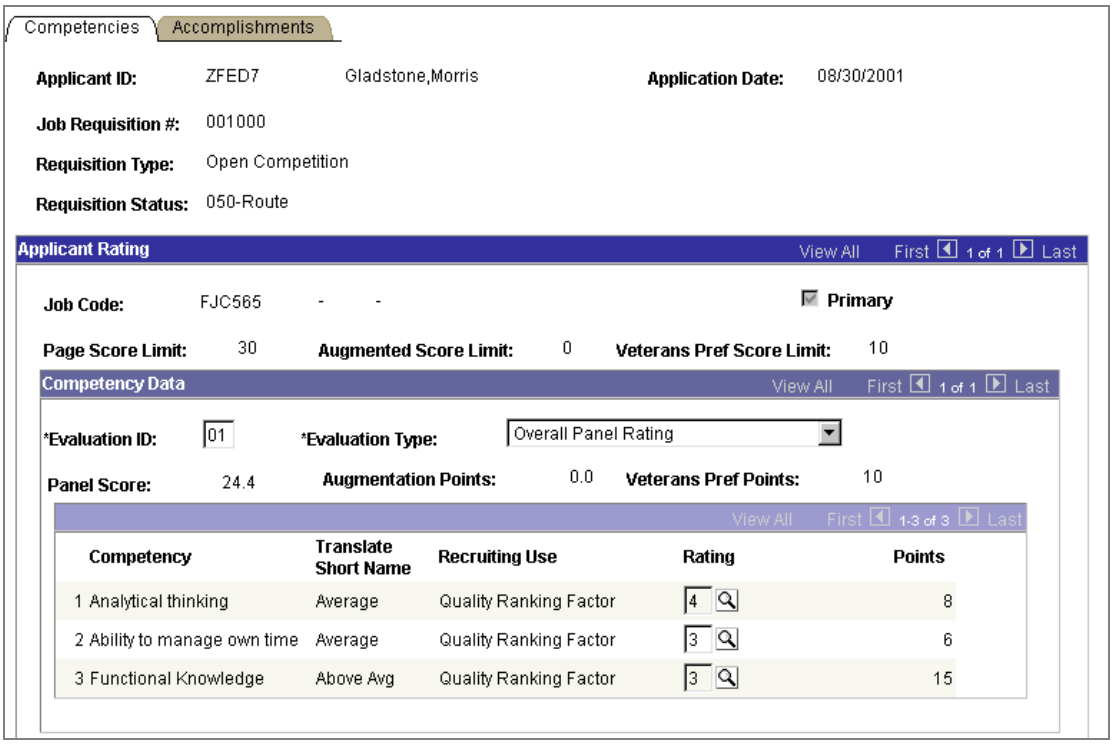
PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

Pages Used to Rate Applicants

Page Name	*Object Name*	*Navigation*	*Usage*
Applicant Rating - Competencies	GVT_COMP_RATING	Develop Workforce, Recruit Workforce (USF), Use, Applicant Rating, Competencies Rating	Display the competencies that you've indicated are valid for rating applicants who are applying for a specific job requisition and assign ratings and points for each competency to the applicant.
Applicant Rating - Accomplishments	GVT_ACCOMP_RATING	Develop Workforce, Recruit Workforce (USF), Use, Applicant Rating, Accomplishments Rating	Assign accomplishment points for each applicant.

Assigning Ratings and Points for Competencies

Access the Applicant Rating - Competencies page.



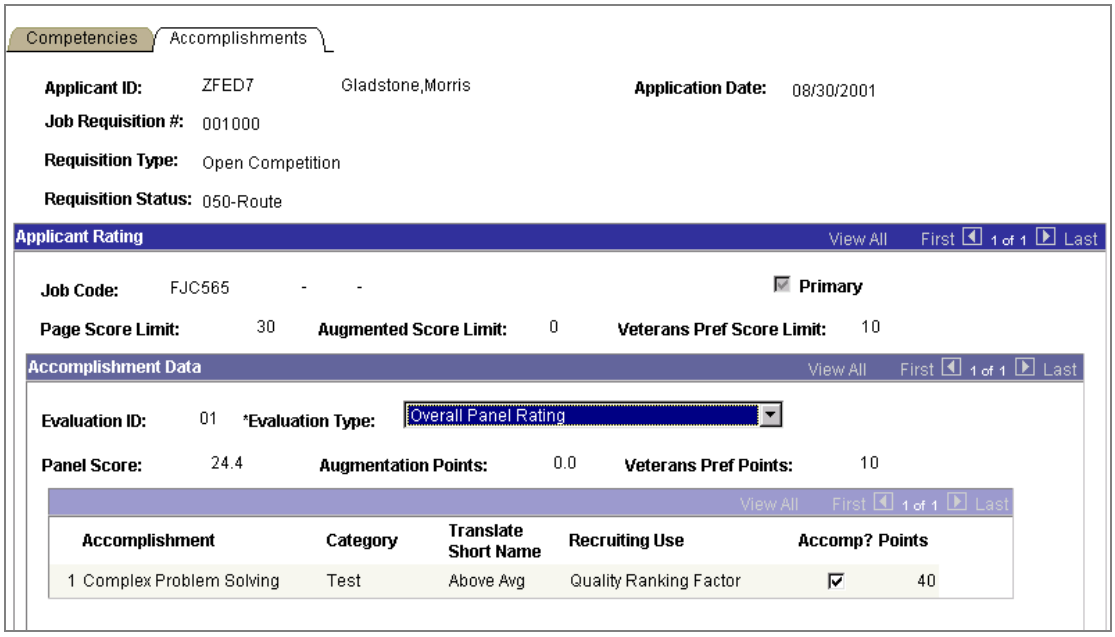
Applicant Rating - Competencies page

Evaluation ID The default value is *01*. You can create multiple evaluations, each representing an evaluation of an individual panel member. The system allows only one overall panel rating. The scores recorded here are the final scores for the applicant, and are used in subsequent stages of the recruiting process.

Evaluation Type Select ***Individual Panel Member Rating*** or ***Overall Panel Rating.***

Assigning Points for Accomplishments

Access the Applicant Rating - Accomplishments page.



Applicant Rating - Accomplishments page

Accomp? (accomplished) Select this check box to indicate that points are to be credited to the applicant.

Evaluating Applicants

The next step in the recruiting process is to determine an applicant's qualifications. All applicants who passed basic eligibility and minimum qualifications and have been rated populate the Evaluation of Candidates component.

The primary use of the Evaluation of Candidates component is to review applicants and their scores. These pages provide the flexibility to view and update applicant status at any point in the recruiting process.

This section discusses how to:

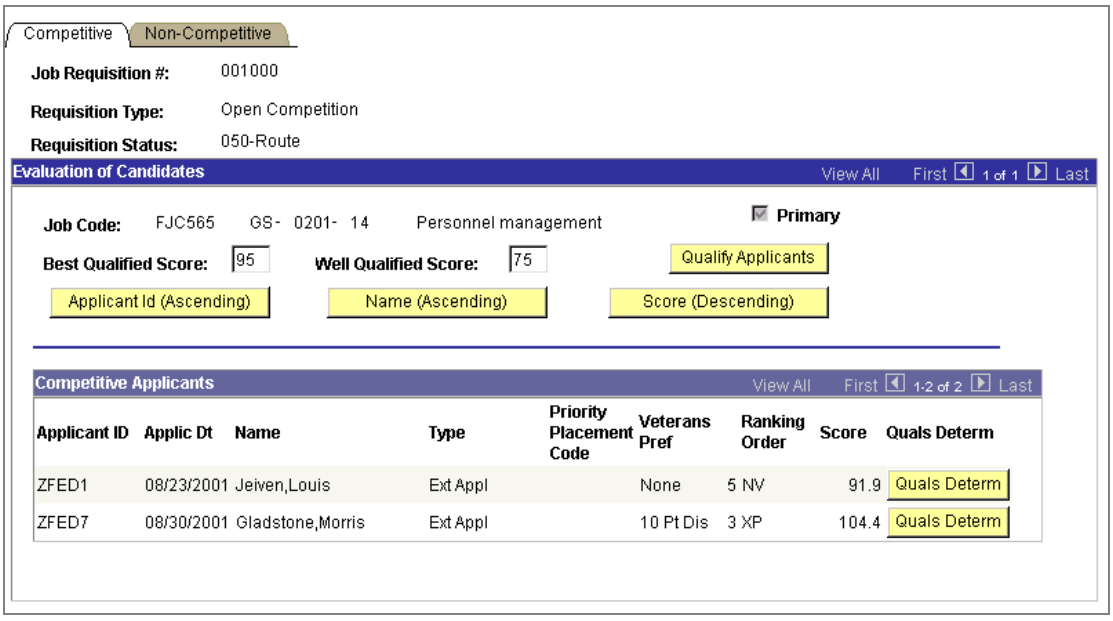
1. Evaluate competitive applicants.
2. Determine whether an applicant qualified for a job.
3. Evaluate non-competitive applicants.

Pages Used to Evaluate Applicants

Page Name	*Object Name*	*Navigation*	*Usage*
Evaluation of Candidates – Competitive	GVT_CAND_EVALUATN1	Develop Workforce, Recruit Workforce (USF), Use, Evaluation of Candidates, Competitive Candidates	Review applicants and their scores for applicants who are considered competitive for the job.
Qualifications Determination	GVT_CAND_EVAL1_SEC	Click the Quals Determ (qualifications determination) link on the Evaluation of Candidates - Competitive page.	Determine whether an applicant qualified for the job and what the disposition was.
Evaluation of Candidates - Non-Competitive	GVT_CAND_EVALUATN2	Develop Workforce, Recruit Workforce (USF), Use, Evaluation of Candidates, Non-Competitive Candidates	Review applicants and their scores for applicants who are not considered competitive for the job.

Evaluating Competitive Applicants

Access the Evaluation of Candidates - Competitive page.



Evaluation of Candidates - Competitive page

Evaluation of Candidates

Best Qualified Score, Well Qualified Score	Values are populated with information from the Federal Scoring Criteria page, if you defined them there. Otherwise, analyze the scoring to determine natural breaks and enter values here. For example, in the following list of points for applicants there is a natural break between 34 and 25: 45, 37, 35, 34, 25, 20, 19, and 18. You might decide to make 34 points a best-qualified score, and 20 points a well-qualified score. If there are no preferred eligibles, only the best-qualified candidates are referred. If there are preferred eligibles, the nature of their preference might be that they must be selected if they are well-qualified, or they must at least be referred.
Qualify Applicants	Click to validate each applicant's Qualifications Determination status, based on the values defined in the screening criteria.

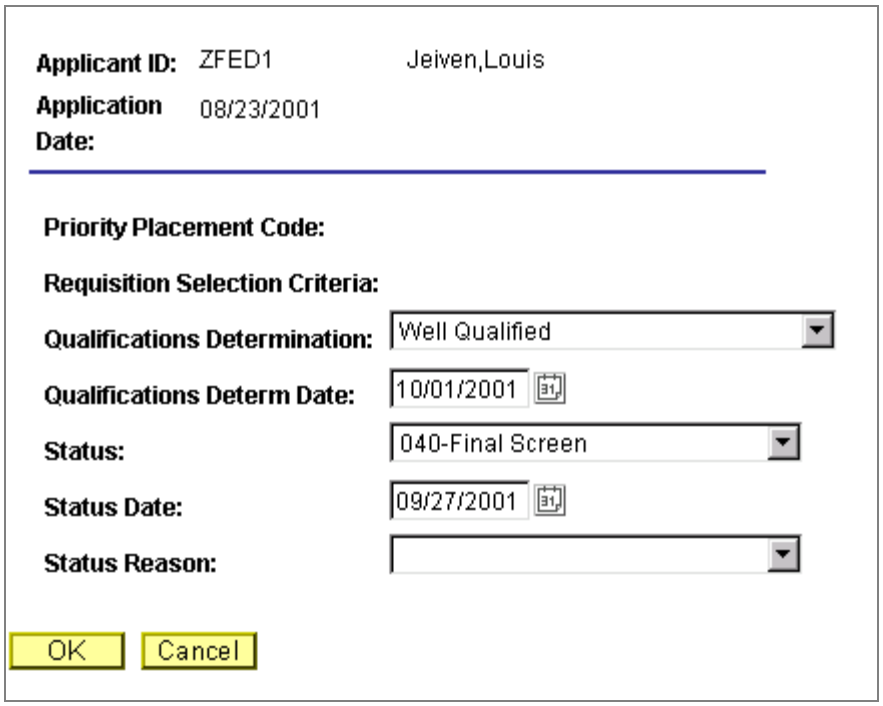
Competitive Applicants

This group box lists candidates who have qualified.

Score	The combined points as determined from the Applicant Rating page.
Quals Determ (qualifications determination)	Click to access the Qualifications Determination page, where you can see whether the applicant qualified for the job and what the disposition was.

Determining Whether an Applicant is Qualified for a Job

Access the Qualifications Determination page.



Qualifications Determination page

Priority Placement Code A code appears if an applicant is entitled to priority consideration (where applicable) and stated so on the application. If so, **Requisition Selection Criteria** indicates whether it entitled the applicant to any preference for this particular job requisition. The Priority Placement Table determines which priority placement codes receive preference for which types of job requisitions.

Ranking Applicants

For each job requisition created, the recruiter develops a Ranking Plan. Similar to the crediting plan, the Ranking Plan defines the parameters to use in the Ranking Process. Use the Ranking Plan component to set up and apply the job requisition ranking criteria for competitive and non-competitive candidates.

This section discusses how to:

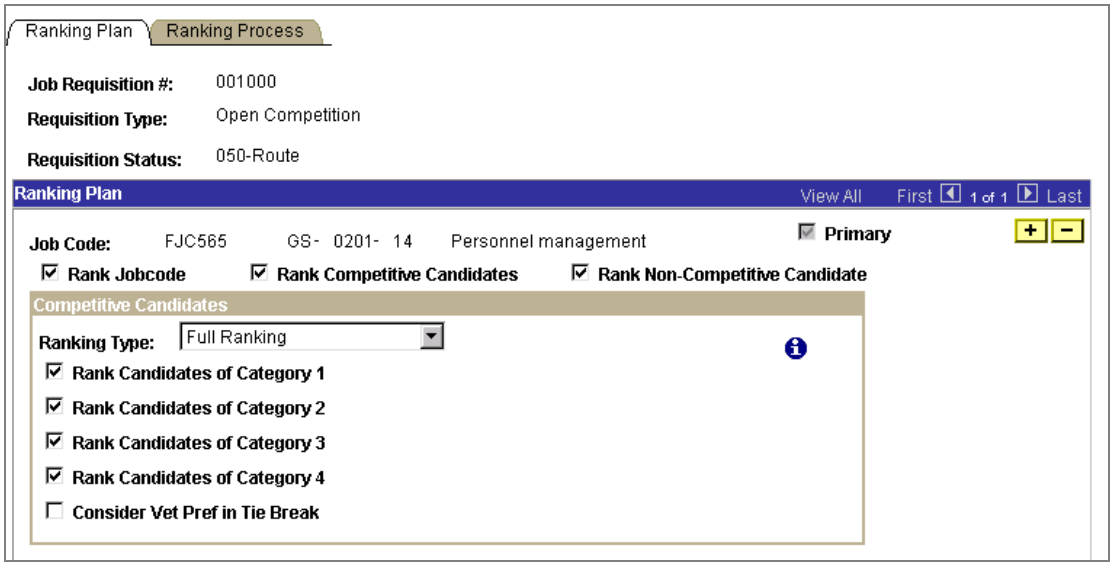
1. Rank applicants.
2. Review descriptions of the ranking categories.
3. Track an applicant's ranking results.

Pages Used to Rank Applicants

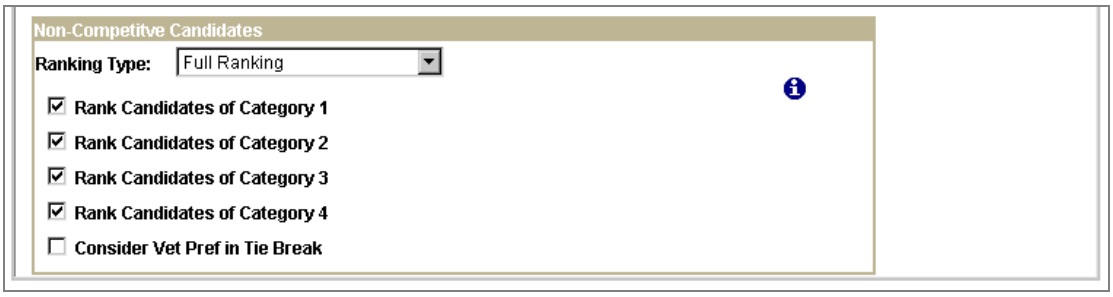
Page Name	Object Name	Navigation	Usage
Ranking Plan - Ranking Plan	GVT_RANKING_PLAN	Develop Workforce, Recruit Workforce (USF), Use, Ranking Plan, Ranking Plan	Set up parameters for ranking applicants for the selected job requisition.
Category Description	GVT_CATGRY_DES_SEC	Click the Category Description button on the Ranking Plan - Ranking Plan page.	Review descriptions of the ranking categories.
Ranking Plan - Ranking Process	GVT_RANKING_PROC	Develop Workforce, Recruit Workforce (USF), Use, Ranking Plan, Ranking Process	Categorize applicants who have passed eligibility processing, apply your ranking plan to those applicants, and rank the applicants.

Ranking Applicants

Access the Ranking Plan - Ranking Plan page.



Ranking Plan - Ranking Plan page (1 of 2)



Ranking Plan - Ranking Plan page (2 of 2)

Rank Jobcode

Select this check box to access the **Rank Competitive Candidates** and **Rank Non-Competitive Candidate** check boxes. Selecting the Rank Competitive Candidates check box makes the **Competitive Candidates** group box available for entry. Selecting the Rank Non-Competitive Candidates check box makes the **Non-Competitive Candidates** group box available for entry. Use these group boxes for establishing further ranking criteria.

Ranking Type

Select *Full Ranking* or *Order By Name Only.* If you select *(none),* the ranking type is automatically set to *Full Ranking.*

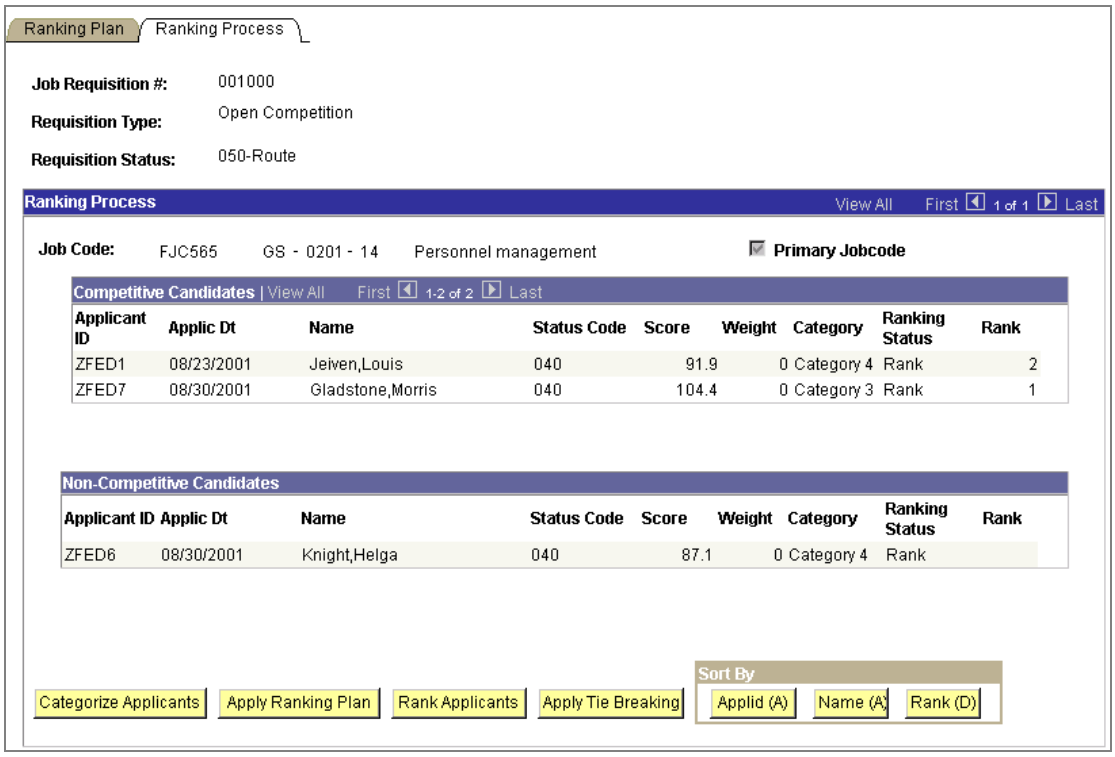
Candidates fall into one of four ranking categories for each job code for which they are qualified. Indicate the category to be used in ranking the candidates for the job requisition by selecting the appropriate check box.

Consider Vet Pref in Tie-Break (consider veterans preference in tie-break)

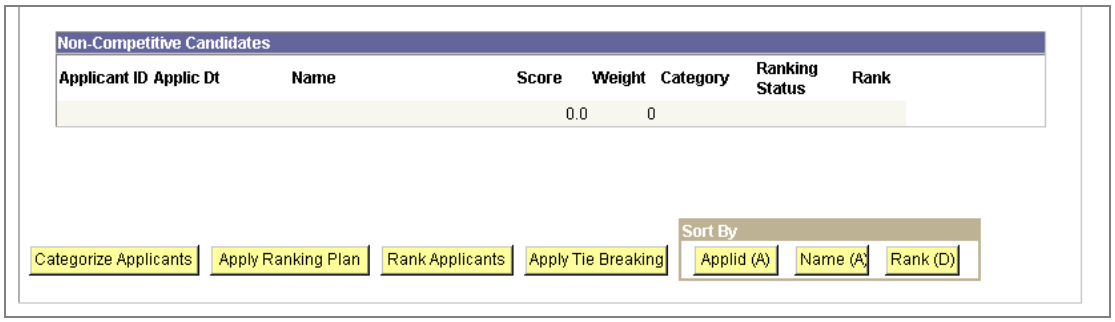
Select this check box if you want veterans to have preference over an equally qualified candidate.

Tracking Ranking Results

Access the Ranking Plan - Ranking Process page.



Ranking Plan - Ranking Process page (1 of 2)



Ranking Plan - Ranking Process page (2 of 2)

Categorize Applicants Click to set the ranking **Category** to which each qualified applicant belongs.

Apply Ranking Plan Click to prompt the system to set the **Ranking Status** for each qualified applicant.

Rank Applicants Click to assign a **Rank** to each qualified applicant.

Apply Tie Breaking Click to apply the tie break. You need to specify the Tie Break Number on the Federal Scoring Criteria page before you can use the tie break.

See Also

"Administering Job Requisitions", (USF) Entering Federal Screening Criteria"

Reviewing Applicant Ranking

Once you've completed the Ranking Process, use the Applicant Selection component to view the ranked list of highly qualified applicants. This list is the end result of all of the identification and qualifying processes that you performed in order to produce a selection of applicants for the Selecting Official to choose from.

This section discusses how to:

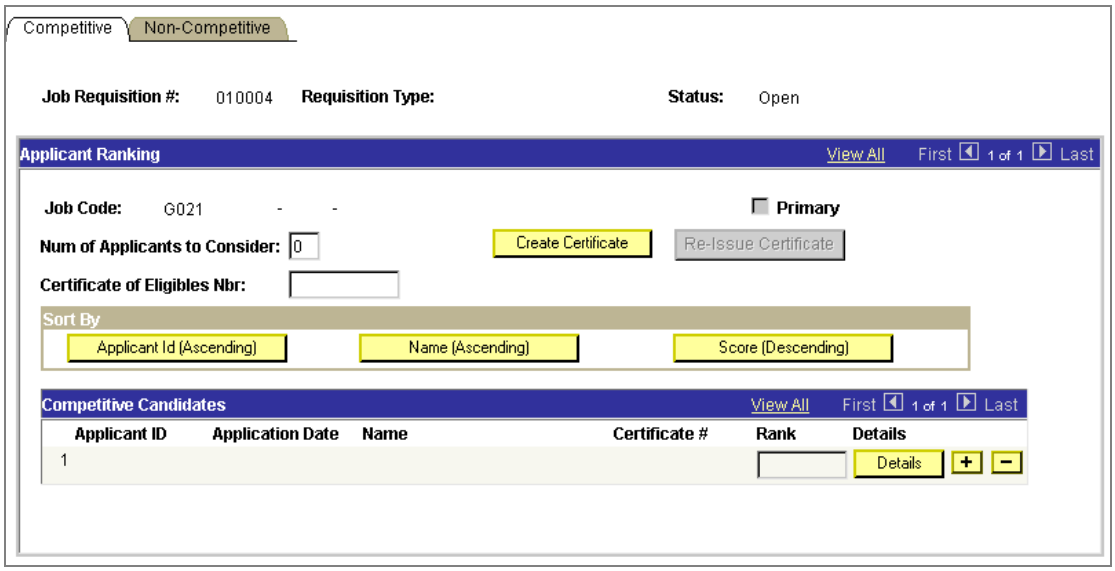
1. Review ranking for competitive applicants.
2. Review additional information about applicants.
3. Review ranking for non-competitive applicants.

Pages Used to Review Applicant Ranking

Page Name	*Object Name*	*Navigation*	*Usage*
Applicant Selection - Competitive	GVT_CERT_ELIG1	Develop Workforce, Recruit Workforce (USF), Use, Applicant Selection, Competitive	Override any rankings that the system has generated for the applicants considered to be competitive for the vacancy. You can also create a Certificate of Eligibles report.
Details - Candidates	GVT_APPLRNKDT3_SEC	Click the Details button on the Applicant Selection - Competitive page.	Review additional information about an applicant.
Applicant Selection – Non-Competitive	GVT_CERT_ELIG2	Develop Workforce, Recruit Workforce (USF), Use, Applicant Selection, Non-Competitive	Override any rankings that the system has generated for the applicants not considered competitive for the vacancy. You can also create a Certificate of Eligibles report.

Reviewing Competitive Applicants

Access the Applicant Selection - Competitive page.



Applicant Selection - Competitive page

Num of Applicants to Consider (number of applicants to consider)

Enter a value. For example, if you enter *3,* only the top three best-qualified applicants are referred to the Selecting Official. The **Competitive Candidates** group box displays the qualified applicants in ranked order. All non-competitive candidates for this requisition who meet the criteria in the Ranking Plan are also referred to the Selecting Official.

Certificate of Eligibles Nbr (certificate of eligibles number)

Enter a number; you define the numbering scheme. You use this number later when printing your Certificate of Eligibles report.

Create Certificate

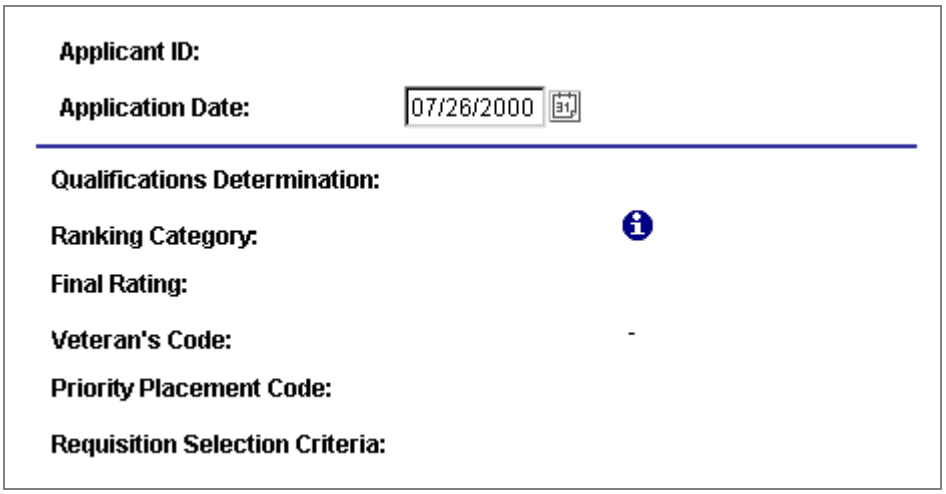
When you click this button, the system automatically assigns the certificate number that you entered to each applicant and creates a referral list commonly referred to as the Certificate of Eligibles. Once a certificate has been created, the **Re-Issue Certificate** button becomes available. You can reissue the certificate if there is a change in the list of eligibles.

Rank

This field is populated with information from the Ranking Plan component. This field is editable, which enables you to change a candidate's rank.

Reviewing Additional Information About Applicants

Access the Details - Candidates page.



Details - Candidates page

Qualifications Determination This value is based on values defined in the Crediting Plan.

Ranking Category This value is based on values defined in the Category Description page.

Veteran's Code This value is derived from the Veterans Preference Table.

Creating a Certificate of Eligibles Report

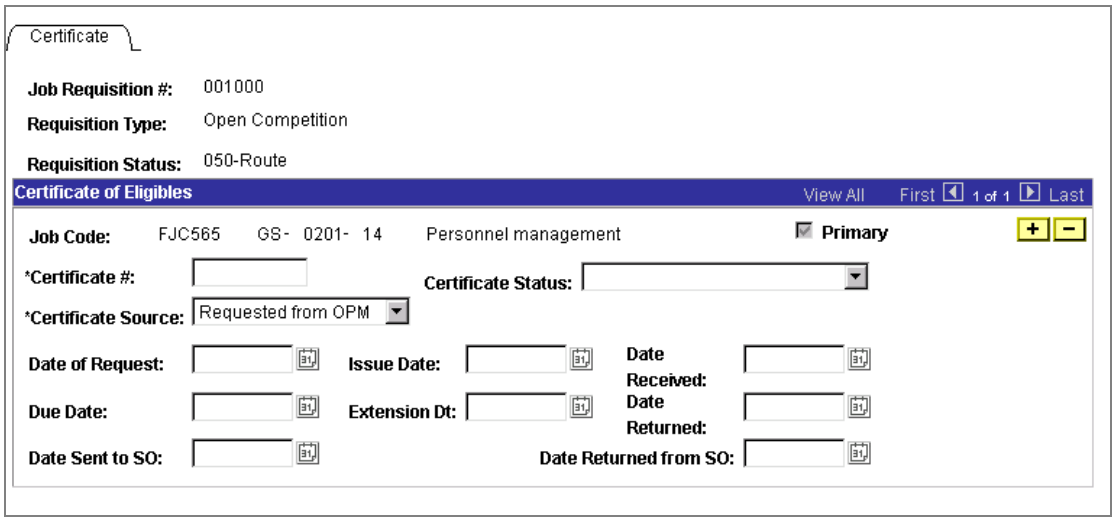
Create and forward a Certificate of Eligibles report for applicants that you have rated and ranked.

Page Used to Create a Certificate of Eligibles Report

Page Name	*Object Name*	*Navigation*	*Usage*
Certificate of Eligibles	GVT_CERT_ELIG	Develop Workforce, Recruit Workforce (USF), Use, Certificate of Eligibles, Certificate of Eligibles	Track pertinent information for each requisition and record and track the progress of certificates.

Creating a Certificate of Eligibles

Access the Certificate of Eligibles page.



Certificate of Eligibles page

Certificate # (certificate number) This number either comes from the Applicant Ranking pages (if you click the Create Certificate button) or you can enter the number here. This number is required.

Certificate Source Select *Generated Internally* or *Requested from OPM.*

Certificate Status Select *Requested, Forwarded by Selecting Off* (forwarded by selecting official) or *Cancelled.*

Dt Returned (date returned) Enter the date that the certificate is returned.

Date Sent to SO (date sent to selecting official) Enter the date that the certificate is ready to be sent to the Selecting Official.

Date Returned from SO (date returned from selecting official) Enter the date when the certificate is returned.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," (USF) FGREC821 - Certificate of Eligibles

Updating Dispositions

Before making an offer to the qualified candidate, use the Applicant Selection pages to update applicants' disposition. You can also update the dispositions of those applicants who do not receive an offer.

The Applicant Selection pages display all applicants who were selected for the Certificate of Eligibles. The Selecting Official selects the applicant of choice and updates the applicants Disposition to *Selected.* This disposition status makes those applicants available on the Requisition Activity - Offer page when you are ready to extend an offer.

For applicants who are not being extended an offer, select the appropriate disposition.

Tracking Requisition Activity

Use the Requisition Activity pages to:

- View the list of applicants who passed screening.
- View routing information.
- View interview schedules for each applicant.

  Recruiting administrators, hiring managers, or recruiters schedule interviews using the Schedule Applicant for Interview page.

- View the results of interviews.

  Interviewers submit their evaluation of applicants using the Interview Evaluation Form self-service transaction. From Requisition Activity, you can view each interviewer's overall rating and recommendations.

- Enter job offer information and record applicants' responses to offers.
- Record expenses claimed by applicants.

See Also

"*Processing Applicants,*" Tracking Requisition Activity

CHAPTER 9

Organizing Interviews

This chapter provides an overview of interview administration and discusses how to:

- Schedule interviews.
- Review interview schedules.
- Generate interview evaluation reminders.

Understanding Interview Administration

To organize interviews:

1. Schedule the interviews.
2. (Optional) Schedule the Interview Evaluation Reminder process.

   The Interview Evaluation Reminder process issues reminders to interviewers who haven't completed the interview evaluation form.
3. Enter interview results.

   When interviews are completed, interviewers complete the interview evaluation form and make recommendations using self-service transactions. The hiring manager or recruiter views a summary of all the interviewers' recommendations and makes the final decision whether to hire the applicant.

   You can define different evaluation forms for different types of jobs. The form used for an evaluation is determined by the recruitment template that you select when you create the job requisition.

See Also

"Setting Up Recruit Workforce," Creating Interview Evaluation Forms

PeopleSoft eRecruit PeopleBook, "Interviewer Transactions," Entering Interview Results

PeopleSoft eRecruit Manager Desktop PeopleBook, "Organizing Interviews"

Prerequisites

Interview results are recorded on interview evaluation forms. Each job requisition is associated with a recruitment template that defines the interview evaluation form used for that job.

You must define your interview evaluation forms and link these to recruitment templates before you can enter interview results. The Interview Evaluation self-service transaction displays only the form that is associated with the requisition.

See Also

"Setting Up Recruit Workforce," Creating Interview Evaluation Forms

Scheduling Interviews

Recruiting administrators schedule interviews for any requisitions. If you have PeopleSoft eRecruit Manager Desktop installed, hiring managers and recruiters can also set up interviews for their own requisitions.

Here's how to schedule an interview:

1. Select the interviewer, date, and time for the interview.
2. Check interviewer availability.

   You can view other interviews scheduled for an interviewer on the selected date to avoid time conflicts.
3. (Optional). Add comments for interviewers.

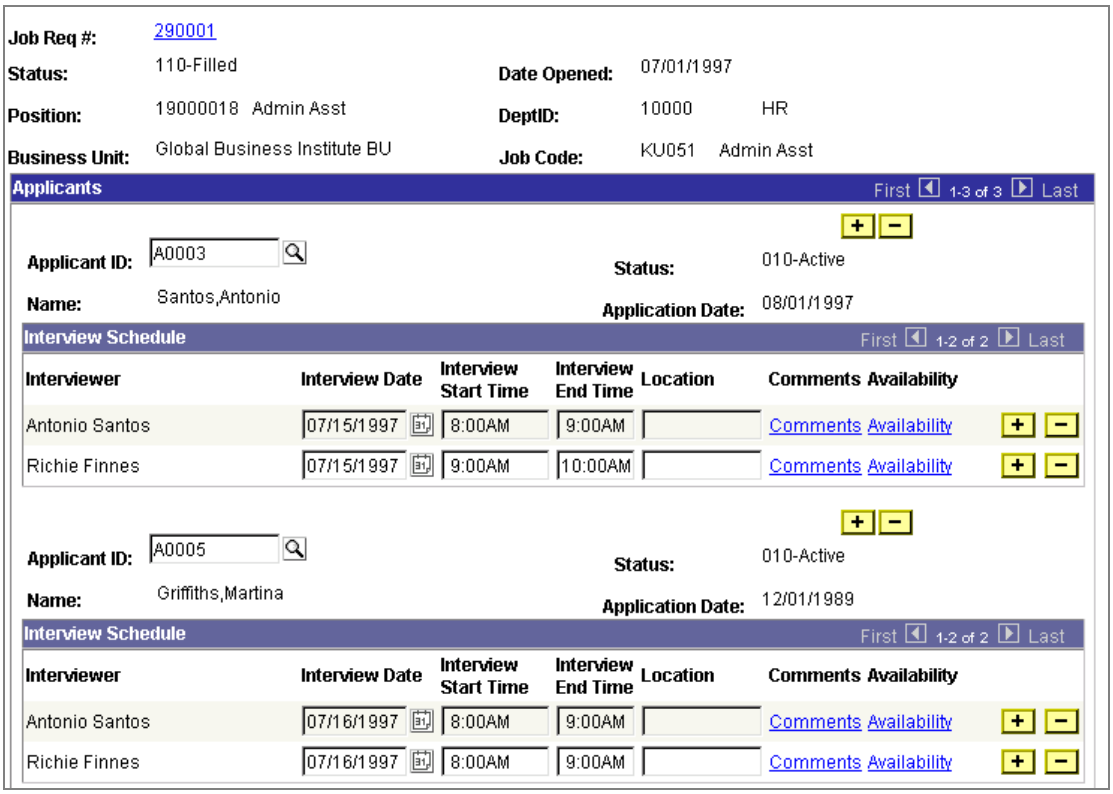
Pages Used to Schedule Interviews

Page Name	*Object Name*	*Navigation*	*Usage*
Schedule Interviews	ER_INTERVIEW_SCHED	Develop Workforce, Recruit Workforce (GBL), Use, Schedule Interviews Develop Workforce, Recruit Workforce (USF), Use, Schedule Interviews	Set up interviews for a given requisition.
Interviewer Availability	ER_INTVW_AVAIL_SEC	Click Availability link on the Schedule Interview page	View a list of interviews scheduled for the selected interviewer on a given day.

Page Name	Object Name	Navigation	Usage
Recruiter Comments	ER_RCRTR_CMTS_SEC	Click Comments link on the Schedule Interview page	Enter comments for interviewers.

Scheduling Interviews

Access the Schedule Interviews page.



Schedule Interviews page

Interviewer The system automatically displays the interviewers that you selected when you created the job requisition. If no interviewers were specified, the system displays the originator.

Interview Date Enter the date of the interview, the **Start Time,** and the **End Time** for the interview.

Comments Click this link to display the Comments page, where you enter information for interviewers.

Note. Comments aren't visible to applicants viewing their interview schedule using PeopleSoft eRecruit.

Availability Click this link to display the Interviewer Availability page, where you can view details of interviews scheduled

for the interviewer on the date selected. This link is available only when you enter an interview date.

See Also

"Administering Job Requisitions," Creating Job Requisitions

Reviewing Interview Schedules

You can view interview schedules for the following:

- A selected requisition using Requisition Activity.
- An applicant using Applicant Activity.

See Also

"Processing Applicants," Tracking Requisition Activity

"Managing Applicants," Tracking Applicants

Generating Interview Evaluation Reminders

The Interview Evaluation Reminder process (ER_IN_EVAL) issues workflow emails or worklists to interviewers who have not completed the interview evaluation form.

Depending on your organizational requirements, run this process at regular intervals or on ad-hoc basis. If you have interviews scheduled regularly throughout the year, it is more effective to run the process at defined intervals.

The default recurrence definition associated with this process is *Weekly - Friday,* which means the process runs once a week every Friday.

Create your own recurrence definition for the process or modify the *Weekly - Friday* definition to suit your needs. To create or modify recurrence definitions, from PeopleTools select **Process Scheduler Manager, Use, Recurrence Definitions.**

In the Every fields in the Repeat group box, enter the frequency and time unit (*Hours, Minutes,* or *Seconds*).

Once you have set up the schedule and started the PeopleSoft Process Scheduler, the process runs automatically without user intervention. However, if you need to run the process manually at an unscheduled time, use the Interview Evaluation Reminder - Run Control page.

See Also

PeopleTools PeopleBook: Process Scheduler, "Process Scheduler Development"

Page Used to Run the Interview Evaluation Reminder Process

Page Name	*Object Name*	*Navigation*	*Usage*
Interview Evaluation Reminder - Run Control	RUNCNTL_ER_INT_REM	Develop Workforce, Recruit Workforce (GBL), Process, Interview Evaluation Reminder Develop Workforce, Recruit Workforce (USF), Use, Schedule Interviews	Run the Interview Evaluation Reminder process (ER_INT_EVAL) on an ad-hoc basis. Define the interview period by entering a From Date. The system generates reminders for interviews that were scheduled after this date but before the current date. This ensures that you don't issue reminders for all old interviews in your system.

CHAPTER 10

Hiring Applicants

This chapter provides an overview of the hiring process for the three types of applicants and discusses how to:

- Set up contracts.
- Specify employment information in contracts.
- Enter hiring data.

Understanding the Hiring Process

The process of hiring applicants varies according to the type of applicant:

- External applicant.
- Non-employee.
- Employee.

Note. If you're rehiring employees, they are processed as external applicants. The only difference is that you can assign their previous employee ID.

Hiring External Applicants

Here's how to hire an external applicant:

1. Set up the applicant's contract data (optional).

   In some countries you might be required to set up employment contracts in advance of hiring applicants. If this applies to you, set up the applicant's contract using the Applicant Contract Data pages in Recruiting Workforce. Next, enter the applicant's contract number on the Applicant Activity – Requisitions page.

1. Add the applicant as a non-employee if you want to enroll the applicant in training courses prior to hiring (optional).

   Sometimes you need to train applicants before you actually hire them. To enroll someone in a course using Administer Training the person must be an employee or non-employee,

so create a temporary non-employee record for the applicant. Click the Add Non-Employee link on the Applicant Data – Applicant Requisition page or Applicant Activity pages.

2. Hire the applicant using the Hire Applicant pages.

   This creates an employee ID for the applicant and the system copies the applicant information that you entered in Recruit Workforce to the new employee records. If you specified an employment contract, the system automatically transfers the contract information to the hired applicant's employee records.

See Also

Specifying Employment Contracts for Applicants

What Happens When You Hire Applicants?

Hiring Non-Employees

Here's how to hire an applicant who is currently a non-employee:

1. Set up the applicant's contract data (optional).
2. Hire the applicant using the Hire Applicant pages.

Note. The non-employee data remains in your system when you hire the applicant. You must manually update the non-employee data to indicate that it is no longer active. Maintaining non-employee data is explained in *PeopleSoft Human Resources PeopleBook: Administer Workforce.*

See Also

Hiring External Applicants

Hiring Employees

Employees who apply for openings within your organization already have employment contracts and employee IDs. To record the employee's job transfer, update the employee's job data instead of using the Hire Applicant pages.

Here's how to transfer employees:

1. From the Job Data – Work Location page in Administer Workforce, insert a new row. Enter the Effective Date that the employee starts the new job.
2. In the Action field, select *Transfer* from the available options. In the Reason field, select *Internal Recruitment.*

When you navigate out of the Reason field, the system displays the Job Requisition # (job requisition number) field.

3. Select the job requisition from the list of open requisitions and save the changes.

   When you save the page, the system changes the employee's job details and updates the status of the successful applicant and other applicants linked to the requisition.

What Happens When You Hire Applicants?

Although the process for hiring applicants varies according to the type of applicant, the system updates the applicant and job requisition records in the same way.

Here's how the system handles the following types of data:

- Hired applicant's records.

  The system sets the applicant's application status to *Hired* and the disposition status to *Hired.* You can't link hired applicants to requisitions and the system excludes hired applicants when searching for applicants to match requisitions. This prevents you from accidentally linking the applicant to any new requisitions. If the applicant is linked to more than one requisition, the system updates the disposition of the other applications to *Reject* with a reason of *Selected* for *Other Position.* This means the applicant has withdrawn from those requisitions and is automatically excluded from requisition screening and subsequent recruitment activity.

- Data for other applicants linked to the requisition.

  If all the openings for the requisition are filled, the system changes the disposition of all applicants linked to the requisition with a disposition of *On Hold* to *Rejected* and sets the Reject Reason field to *Another applicant hired.*

- Requisition data.

  If the requisition has no further openings (Target Openings is *0*), then the system sets the requisition status to *Filled.*

Setting Up Contracts

If your organization creates and uses employment contracts, you can use PeopleSoft Human Resources to define and maintain those contracts. Three tables are included for setting up employment contract components:

- Contract Type Table

  Use this table to define the different types of contracts that your organization administers.

- Contract Clause Table

Because contracts often have additional language and riders that can be added to the main body of an agreement, define these contract clauses in this table and reference them when you establish a contract between your organization and your workers in the Administer Workforce pages.

- Contract Template Table

Use this table to set up and store all of your organization's standard employment contracts. Use this information when you assign particular contracts to employees and temporary workers in your organization.

Access these pages from the Recruit Workforce or the Administer Workforce.

Specifying Employment Contracts for Applicants

Use the Applicant Contract Data pages to record important information about agreements and contracts that you are negotiating between your organization and job applicants and build contracts based on standard language and exclusions that you set up in the Contract Type, Contract Template, and Contract Clause Tables.

In this section we discuss how to:

1. Record basic contract information.
2. Define special contract clauses.
3. Track contract dates.

Pages Used to Specify Employment Contracts

Page Name	*Object Name*	*Navigation*	*Usage*
Contract Status/Content	APP_CONTRACT1	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Contract Data, Contract Status/Content Develop Workforce, Recruit Workforce (USF), Use2, Contract Data App, Contract Status/Content	Record basic information about the contract between your organization and the applicant, including the contract duration, type, and content information.

Page Name	Object Name	Navigation	Usage
Contract Clause	APP_CONTRACT2	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Contract Data, Contract Clause Develop Workforce, Recruit Workforce (USF), Use2, Contract Data App, Contract Clause	Define any special contract clause information to be added to the standard contract for the applicant.
Signature Date/Probation Info (signature date/probation information)	APP_CONTRACT3	Develop Workforce, Recruit Workforce (GBL), Use, Applicant Contract Data, Signature Date/Probation Info Develop Workforce, Recruit Workforce (USF), Use2, Contract Data App, Signature Date/Probation Info	Track who is responsible for drafting the applicant's contract, the signature date, and information about the applicant's probationary period.

The fields on these pages are the same as those on the Contract Status/Content page and Signature Date/Probation Info page accessed from the Administer Workforce business process.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Adding Basic Contract Information

Entering Hiring Data

When you are ready to hire an applicant in Recruit Workforce, perform the actual hire using the Hire Applicant pages. Any contract information, along with other relevant data, transfers to the applicant's employee records automatically.

In this section we discuss how to:

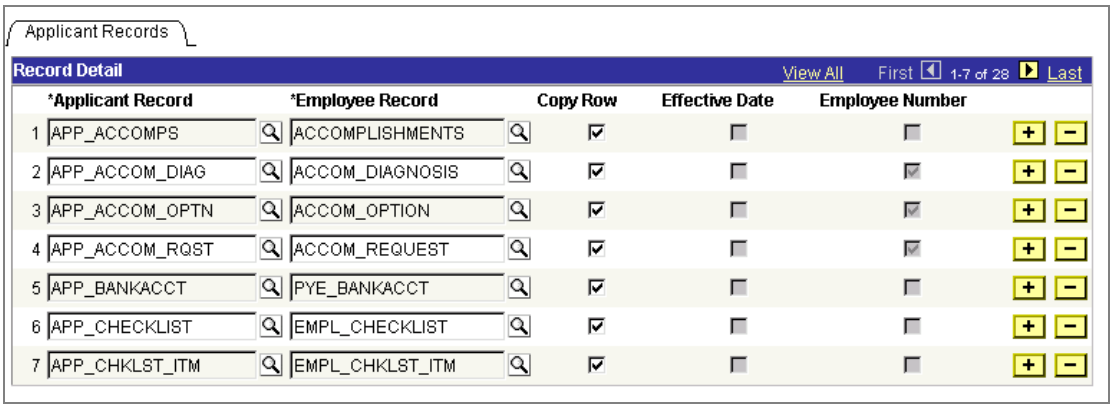
1. (Optional). Define applicant records copied to employee records.
2. Assign an employee ID.
3. Review applicant data.

Pages Used to Enter Hiring Data

Page Name	Object Name	Navigation	Usage
Applicant Records	RW_APP_EMP_CPY	Define Business Rules, Administer HR System, Use, Maintain Applicant Records, Applicant Records	Define the applicant records that are copied to employee records during the hire process. When you hire external applicants and non-employees, the system copies the applicant data listed on this page to the new employee records. If you have modified the structure of your applicant or employee records, you might need to update this page to reflect your modified record structure.
Hire Applicant - Applicant	APPLICANT_HIRE	Develop Workforce, Recruit Workforce (GBL), Use, Hire Applicant, Applicant	Assign an applicant an employee ID. Use this page only for external applicants or non-employees. The applicant's disposition must be *Ready to Hire.*
Applicant Hire	GVT_APPLICANT_HIRE	Develop Workforce, Recruit Workforce (USF), Use, Hire Applicant, Applicant	For U.S. Federal government installations only. This page has the same options for assigning an applicant an employee ID. Use this page only for external applicants or non-employees. The applicant's disposition must be *Ready to Hire.*

Defining Applicant Records

Access the Applicant Records page.



Applicant Records page

Warning! Changes to the Applicant Records page must be made by technical personnel with an in-depth understanding of the structure of your PeopleSoft Human Resources database. If the Applicant Records page is not set up correctly, employee records created by the hire process may be incomplete or set up incorrectly. Always refer to your database administrator before updating this page.

Applicant Record Select the record that you want to copy to the employee record.

Employee Record Select the employee record that you want to populate with data copied from the Applicant Record field.

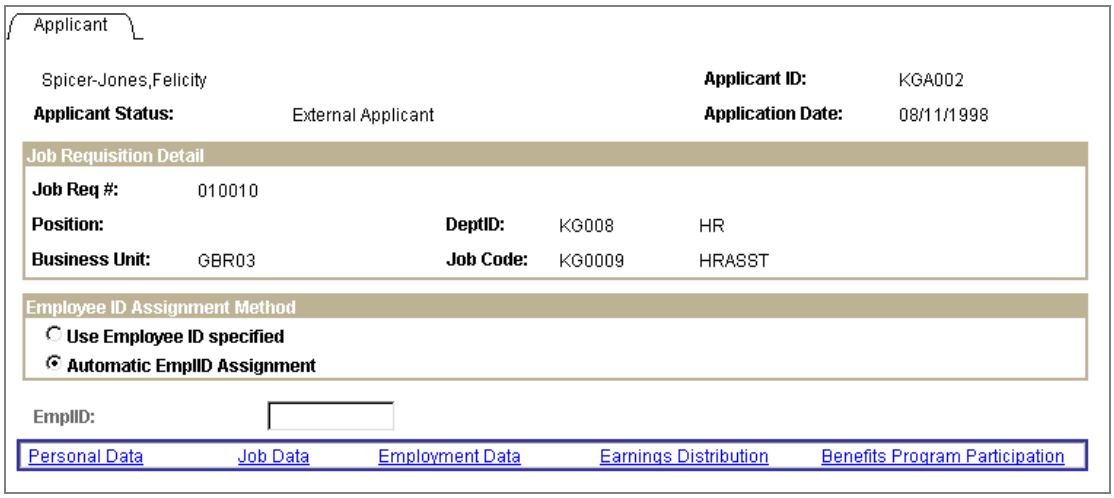
Copy Row Select this check box if you want to copy an applicant's data to the record specified in the Employee Record field.

Effective Date The system automatically selects this check box if the employee record is an effective-dated table. The system makes this field unavailable for entry.

Employee Number The system automatically selects this check box if the employee record number is a key for the table specified in the Employee Record field. The system makes this field unavailable for entry.

Assigning an Employee ID

Access the Hire Applicant - Applicant page.



Hire Applicant - Applicant Hire page

Job Requisition Detail

The system populates the fields in this group box from job requisition data. These fields are for information only.

Employee ID Assignment Method

Select one of these options for assigning an employee ID:

Use Employee ID specified	Select if you want to enter the new employee ID manually. Enter the employee ID in the **EmplID** (employee ID) field.
Automatic EmplID Assignment	Select if you want the system to automatically assign an employee ID.

Reviewing Applicant Data

You must complete the following pages for every applicant:

- Personal Data
- Job Data
- Employment Data
- Earning Distribution
- Benefits Program Participation

If you have already entered personal data or application data in Recruit Workforce, some information appears automatically in these pages. Review these pages carefully to make sure all the information that you need is there.

These are the same pages that you access if you hire employees from Administer Workforce.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

CHAPTER 11

Tracking Recruitment Expenses

This chapter provides an overview of tracking recruitment expenses and discusses how to:

- Enter expenses related to a job requisition.
- Enter expenses incurred by applicants.
- Review all expenses related to a job requisition.

Understanding Recruitment Expenses

With PeopleSoft Human Resources you can record and analyze all your recruitment costs and track two types of expenses:

- Job requisition expenses.

  These are costs incurred for the requisition, such as costs of advertising or engaging an agency to handle the requisition.

- Applicant expenses.

  Your organization might incur costs related to applicants; for example, if you reimburse applicants for travel costs or overnight accommodations.

Entering Requisition Expenses

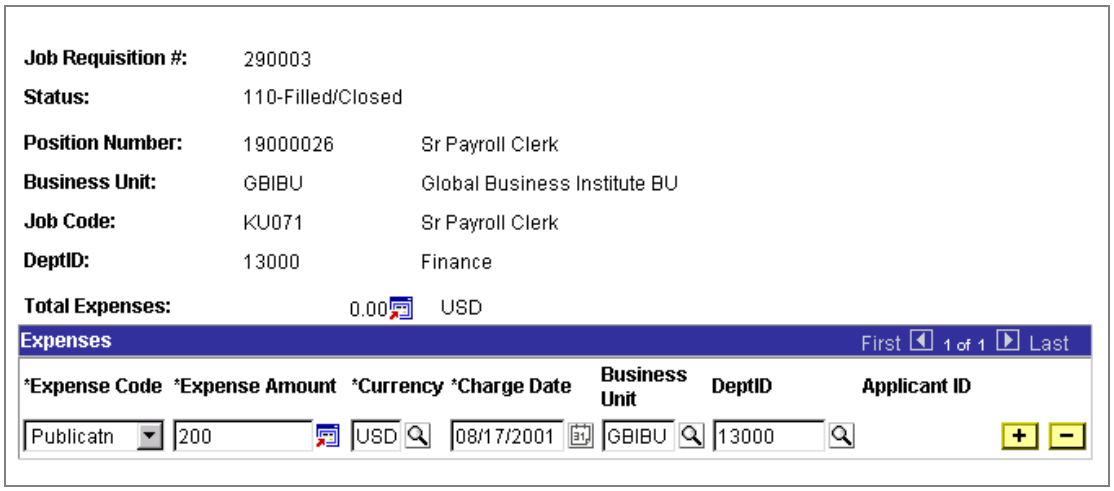
If you incur expenses related to a job requisition that aren't specific to a particular applicant, record them on the Job Requisition Exp page.

Page Used to Enter Requisition Expenses

Page Name	*Object Name*	*Navigation*	*Usage*
Job Requisition Exp (job requisition expenses)	JOB_REQUISITN_EXP	Develop Workforce, Recruit Workforce (GBL), Use, Job Requisition Expenses, Job Requisition Exp Develop Workforce, Recruit Workforce (USF), Use, Job Requisition Expenses, Job Requisition Exp	Record expenses related to a requisition that are not associated with a particular applicant, such as advertising costs or other one-time costs incurred as a result of an open requisition.

Entering Expenses

Access the Job Requisition Exp page.



Job Requisition Exp page

Total Expenses The system automatically sums the expenses and displays the total.

Expenses

Expense Code Select a valid expense code for expenses such as advertising, publications, or other one-time costs not associated with a particular applicant.

The system automatically enters the following expense codes on this page:

Job Boards are expenses associated with posting requisitions to online job boards. These expenses are inserted if you have integrated your system with

	RecruitUSA and activated the expense application message. ***Pre-Employ*** (pre-employment) are expenses for pre-employment checks. These expenses are inserted if you have integrated your system with HireRight and activated the expense application message. ***Refer Fee*** (referral fee) are employee referral awards.
Expense Amount	Enter the expense amount. The system automatically updates the **Total Expenses** field when you add an expense.
Charge Date	Enter the date that the expense is charged to the selected department.

See Also

PeopleSoft eRecruit Manager Desktop PeopleBook, "Administering Job Requisitions," Posting Job Openings to Online Job Boards and "Making Applicant Pre-Employment Checks"

"Administering Employee Referral Programs "

Entering Applicant Expenses

You can enter expenses at any time in the recruitment process once you have set up your job requisitions and linked applicants to them.

You can enter expenses incurred by applicants for a given job requisition in two ways, either using Requisition Activity – Expenses or Applicant Activity – Expenses. It doesn't matter which page you use; the information is added to the same records.

If an applicant submits expenses for more than one requisition, it is quicker to use the Applicant Activity - Expenses page to enter those expenses.

See Also

"Managing Applicants," Tracking Applicants

"Processing Applicants," Tracking Requisition Activity

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