Taleo Talent Management System Training

ADJUNCT HIRING MANUAL

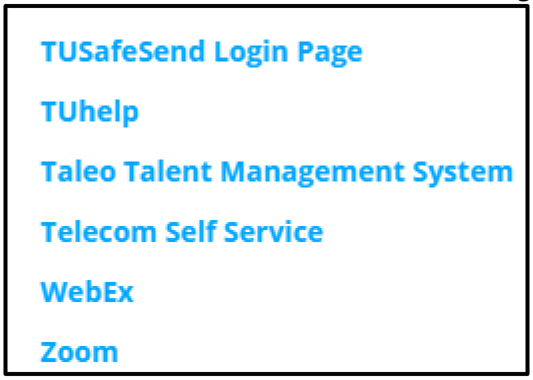
TEMPLE UNIVERSITY

Human Resources

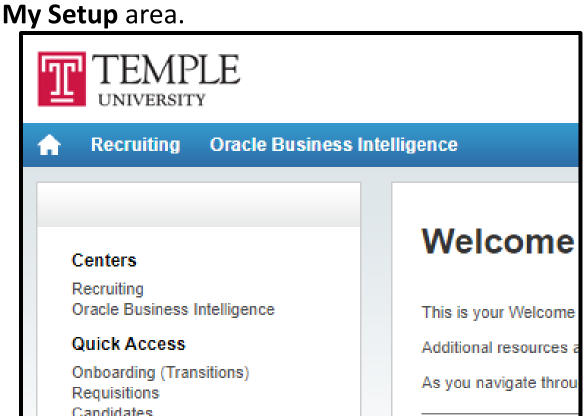
Contents

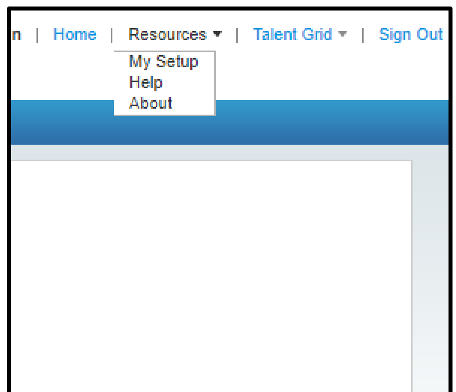
Navigation

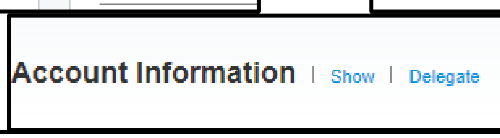
Taleo is accessed from the **TUPortal**. To access select **Taleo Talent Management System**.

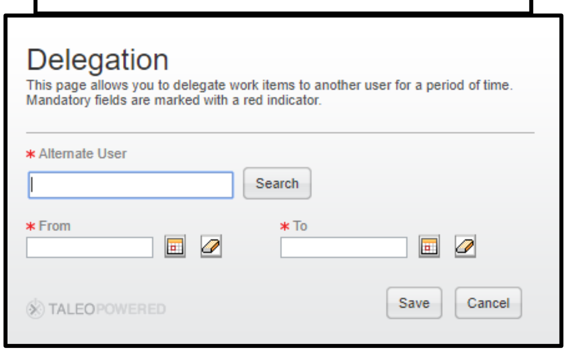


The **Welcome Center** will present you with options to access the **Recruiting Center**, **Onboarding (Transitions)**, **Requisitions**, **Candidates**, and **Resources**. To access the **Recruiting Center** you will need to select the **Recruiting** link at the top of the **Welcome Center** page or you can select the **Recruiting** link in the navigation pane under the **Centers** title. The **Resources** section can be used to **Delegate** access in the **My Setup** area.

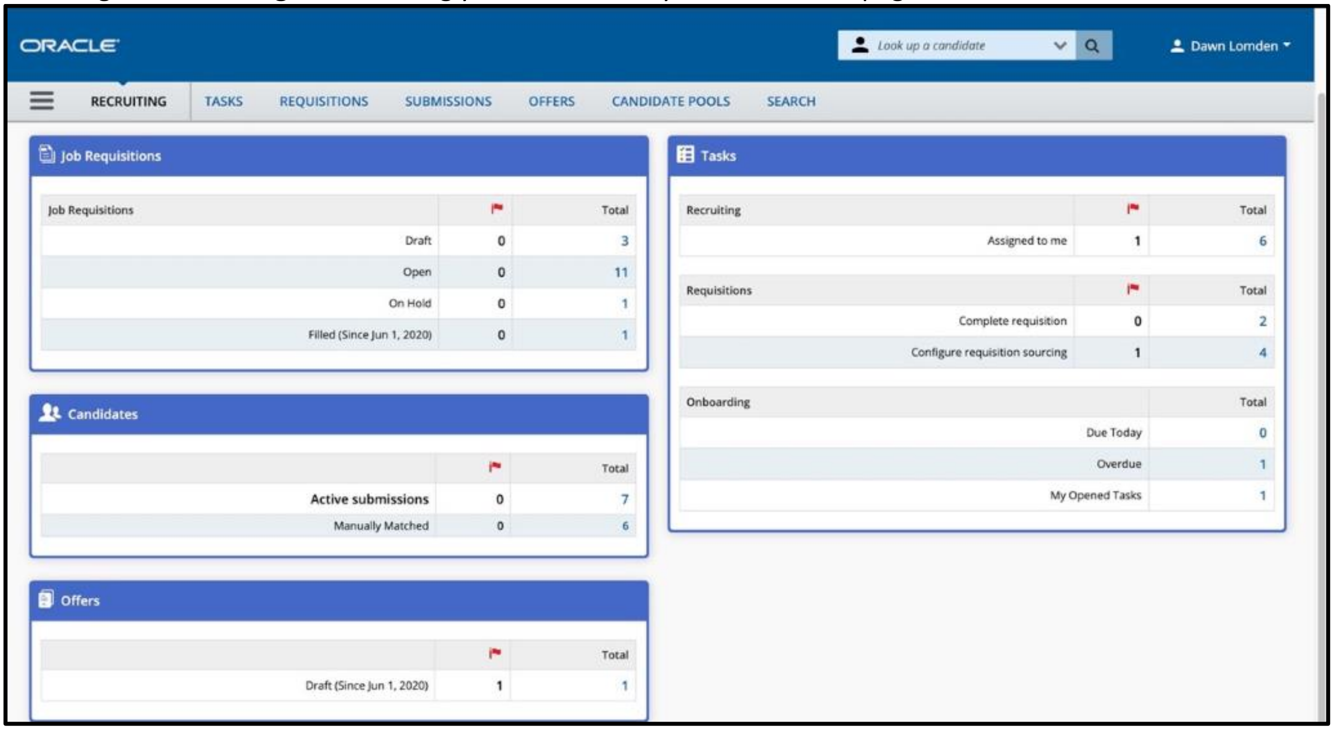




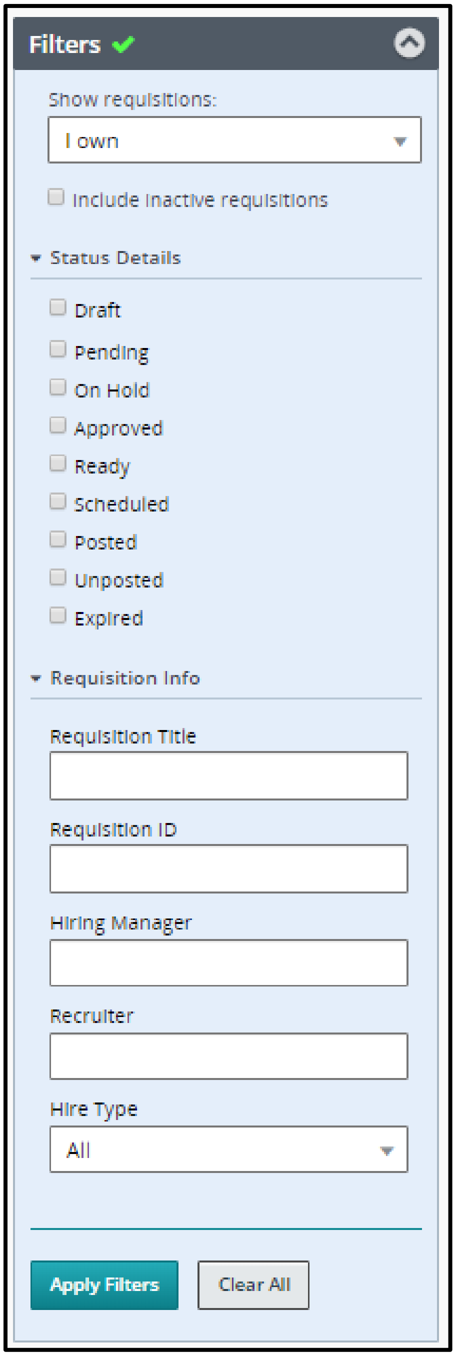




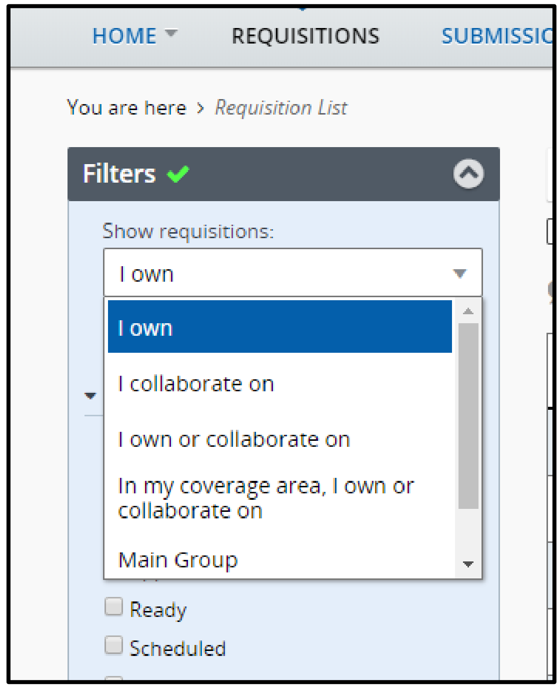
Selecting the **Recruiting** link will bring you to the list of your **Dashboard** page.



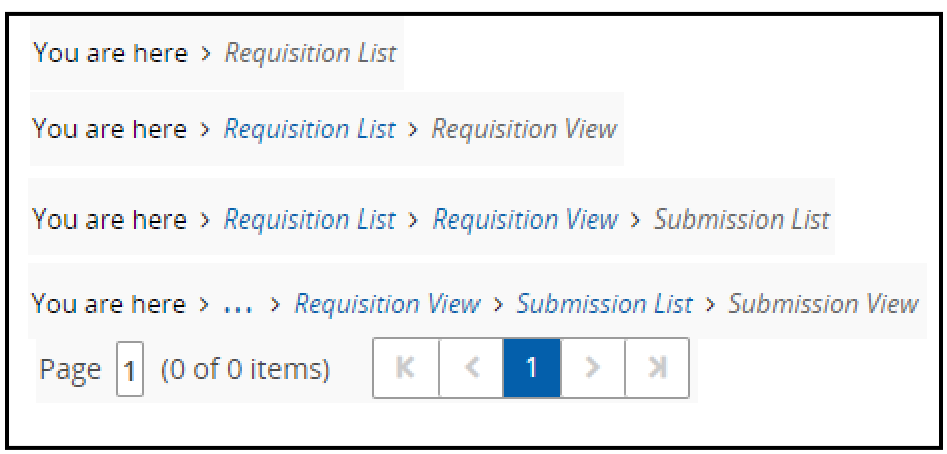
<u>Taleo Tip</u>: To create a Requisition, select the **Requisitions** tab at the top of the page.



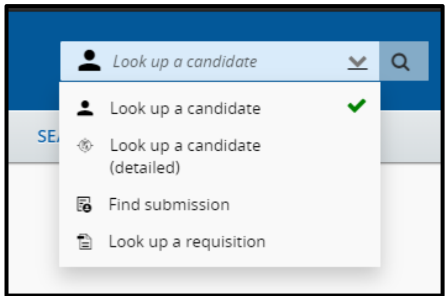
The system automatically defaults to only showing you the requisitions you own. You can change the view by using the **Filters** panel on the left-hand side. You can change your dashboard filter to view information on which you collaborate or information within your coverage area. Coverage areas are Temple's 3 or 5 digit department org.



It is recommended to use links and other navigation tools to move around the Recruiting Center instead of using the browser's Back/Next buttons. Avoid using the Back/Next buttons as they do not always yield consistent results.



1. You can search for your requisition using the **Quick Search** function. From the drop-down, select **Look up a requisition**.



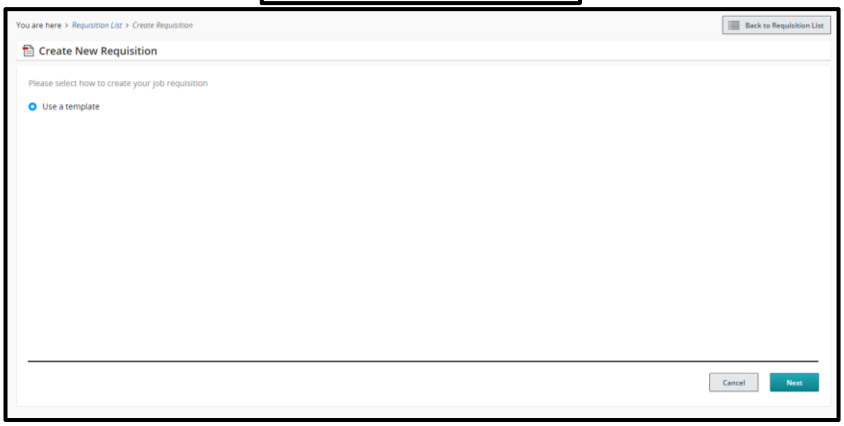
2. Enter the **Posting Title** or **Requisition Number**, then select the magnifying glass or enter to complete the search.

3. The results will populate below. You can use the additional filters on the left-hand side to narrow down your results.
4. The **Menu** bar will bring you to different locations within Taleo. Selecting the specific title will bring you to that specific section. The blue arrow and black text are used to show you which section you are currently working in.

Creating a Requisition – Adjunct

Both the Hiring Managers and Department Recruiters can create a requisition.

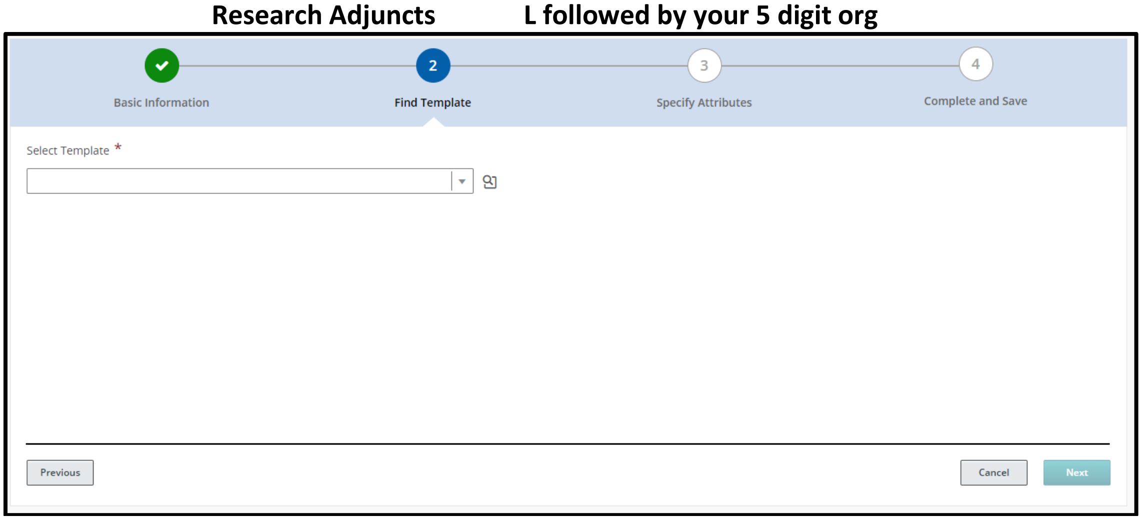
1. To start the Requisition, select **Create Requisition** from the Requisitions page. Then select **Next** to **Create New Requisition**.



Taleo Tip: You may need to scroll to the bottom of the page to view the **Next** button.

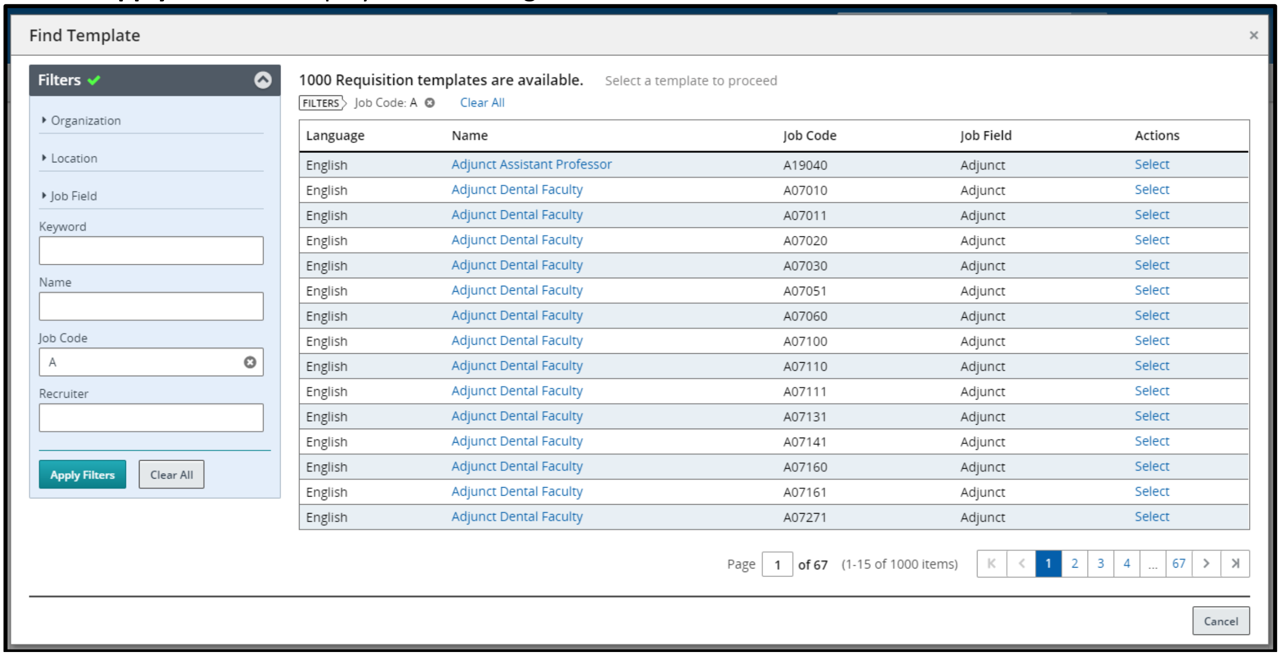
2. The first step is to select a requisition template. The template is selected by entering the PCN of the position you wish to fill.
    a. A valid PCN is **required** **before** you start the requisition. Please check with your Human Resources Business Partner or Department Budget Manager if you have any questions about the title, e-class, or grade associated with the PCN.
    b. Adjunct positions have pooled PCNs. If you have recently created a new department or changed your org code, you will need to check with your School/College Budget Manager if a new PCN was created for the Adjunct position.
    c. The format of the PCN will always be:

Adjunct	**A followed by your 5 digit org**
Artist in Residence	**M followed by your 5 digit org**
Clinical Adjunct	**C followed by your 5 digit org**
Research Adjuncts	**L followed by your 5 digit org**



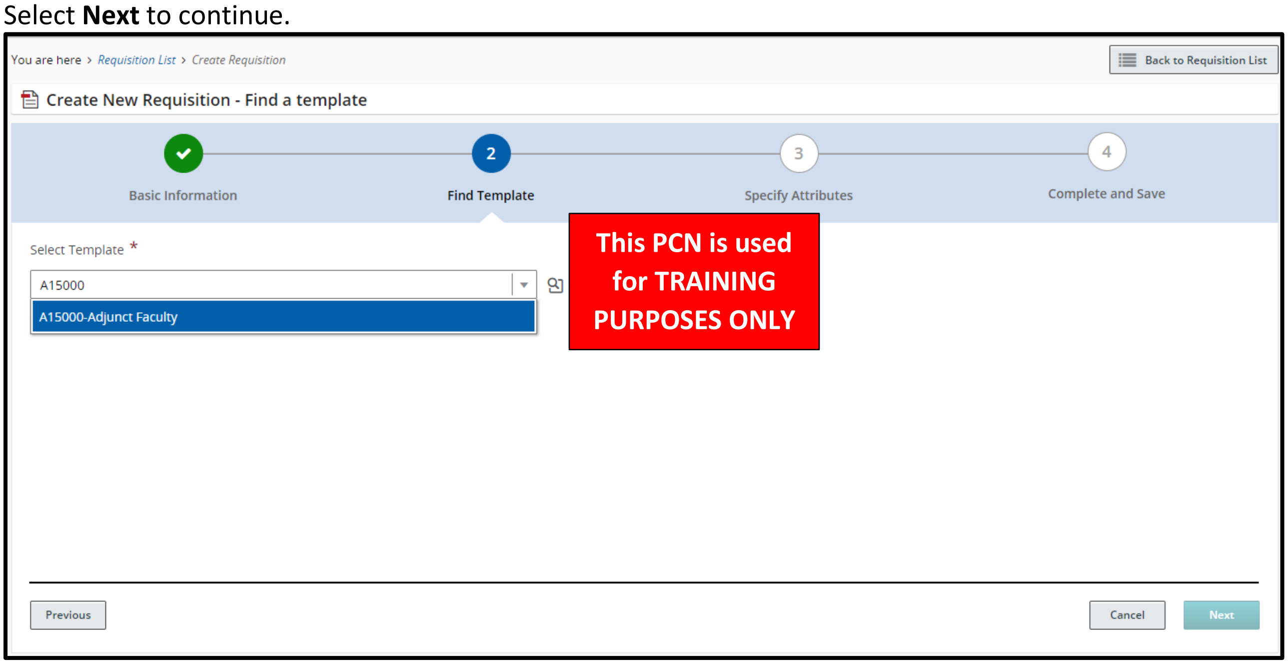
Taleo Tip: Do not use a requisition template/PCN that does not have your org code.

3. You can search for PCN's by using the **Filters** function. For example, if you enter **A** then select **Apply Filters** to display the following:



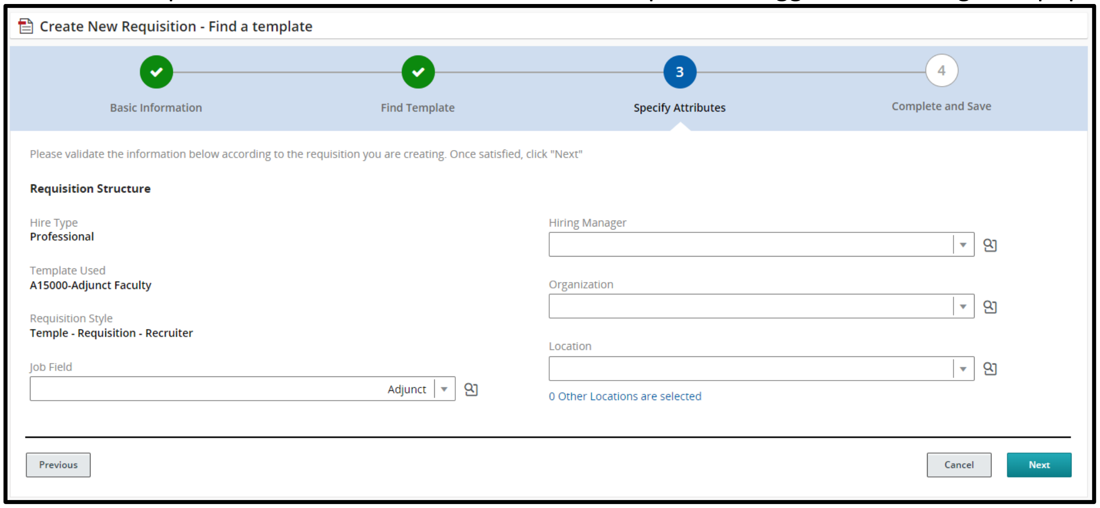
4. Click the **Select** button next to the PCN desired. Your Requisition Template will then populate with your PCN and the template title.

Taleo Tip: You may directly enter data into the fields and the field will begin to auto-complete. The data takes a few seconds to populate. If your data does not populate, then you do not have a valid entry. Select **Next** to continue.



5. Next, you will land on the page to **Specify Attributes**. Note: **WE NEVER CHANGE THE JOB FIELD. THIS RESULTS IN REQUISITION PROCESS DYSFUNCTIONS.**
6. Enter the **Hiring Manager**. This can be your name if you are performing that role. Again, you may type in the last name and wait for the field to populate, or you may use the **Filters** function.

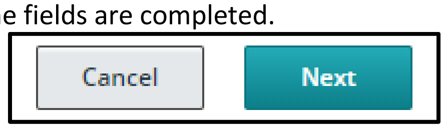
7. Next, you will enter the **Organization**. Start to type your **5 digit Home Org** and suggested values will populate. Select the org desired.
8. The next step is to enter the location. Enter the campus and suggested buildings will populate.



Taleo Tip: If your employee will be working from home or working remotely, you can select **Location INSIDE of PA**, **Outside of PA,** or **Outside of US**. If they will be working both remotely and on campus (in a hybrid format) during the course of the appointment, select **the appropriate campus location**. If they are working only on campus, select **the appropriate campus location**. Also note, if you are hiring multiple employees on one requisition, the location must apply to all employees hired for that requisition.

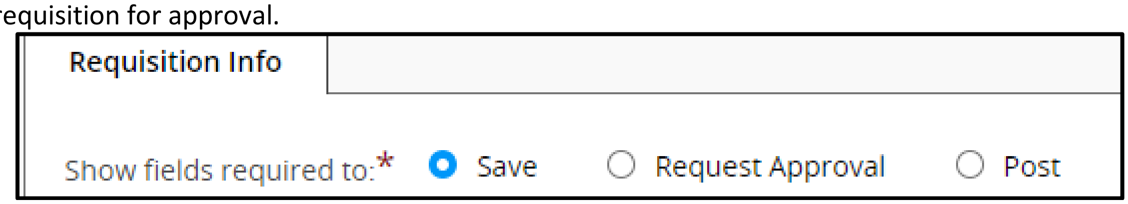
Country	State/Province	City	Campus	Building	Actions
United States					Select
United States	Location INSIDE of PA				Select
United States	Location OUTSIDE of PA				Select
United States	Pennsylvania				Select

9. The Job Field will populate from your PCN. **Do not change what is entered in this field.**
10. Select **Next** when all of the fields are completed.



There are different sections in the Requisition that need to be reviewed and completed. All required fields are marked with a red **asterisk** *.

Taleo Tip: Change the **Show fields required to** to: **Request Approval**. This will display all of the fields required for approval as opposed to just the fields required to **Save** the requisition. This does not send the requisition for approval.



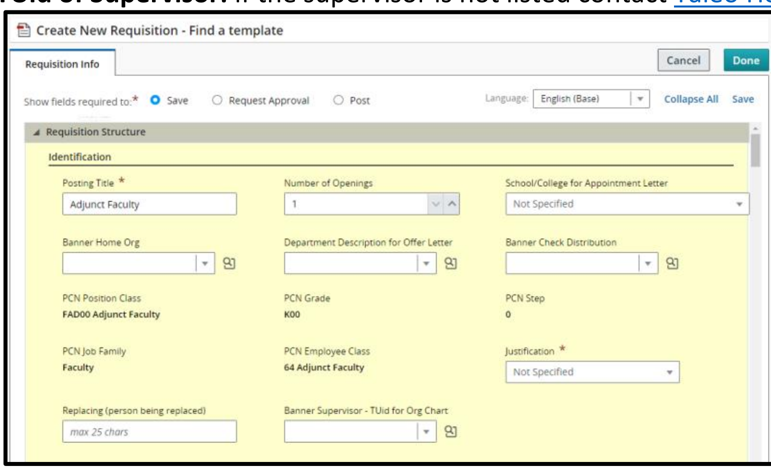
Requisition Structure – Adjunct

1. Requisition Structure

Identification

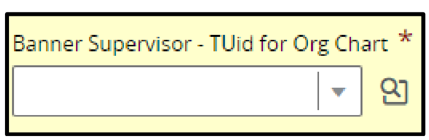
You will need to enter information in this section such as:

1. **Posting Title**: This can be edited to the specific role for the Adjunct
2. **Number of Openings**: This can be edited to be as many positions as needed
3. **School/College for Appointment Letter**: this will be used in the appointment letter
4. **Banner Home Org**: same as the organization from the previous page – use the name from dropdown or selector icon to filter the correct response
5. **Department Description for Offer Letter**: same as the organization from the previous page – use name from dropdown or selector icon to filter the correct response
6. **Banner Check Distribution**: same as the organization from the previous page – use the name from dropdown or selector icon to filter the correct response
7. **Justification for the position**: new position or replacement
    - If this is a replacement, you will need to enter the name of the previous incumbent
8. **Name and TUid of Supervisor:** if the supervisor is not listed contact [Taleo Help]() for assistance

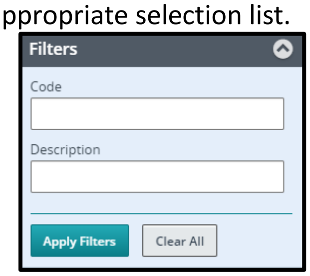


The **Supervisor** field is very important as this field will be imported into Banner and feed other systems such as the **Org Chart**. You can start to type a **name** or a **TUid** and the field will start to populate. Make sure the entry is available so you know it is valid.

Taleo Tip: Some supervisors use their middle initial which might cause the supervisor to appear as not listed.



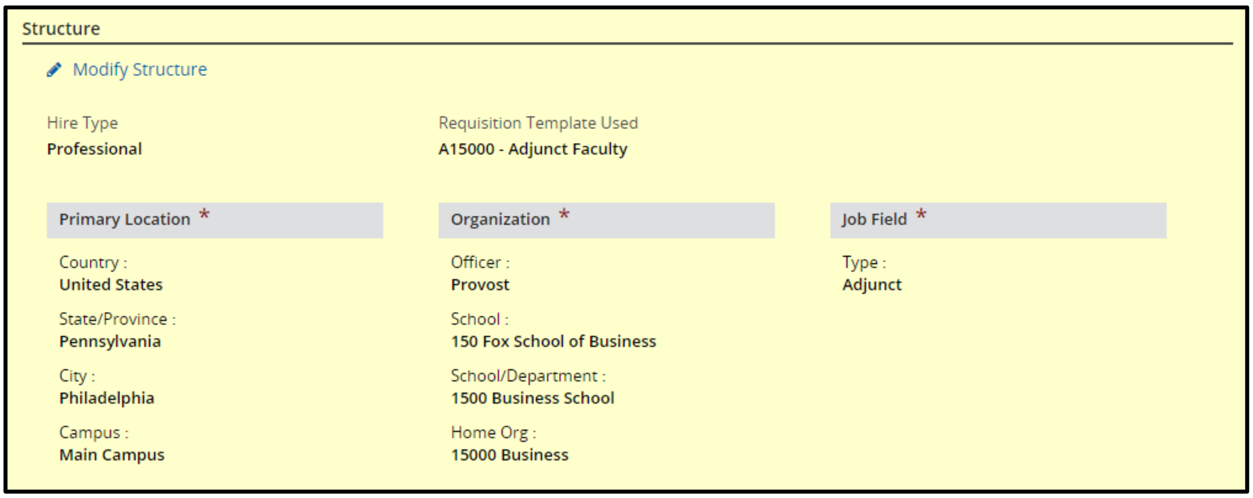
As an alternative, you can use the **Quick Filter** button. Type in a first name or last name, click the **Apply Filters** button and you will receive an appropriate selection list.



Structure

The structure section was completed after you selected the **Create Requisition** button. Caution should be exercised when making modifications in this section as they can directly impact the requisition process. Changes can be made when the requisition is in Draft (pre-Approval) Status only. Follow these guidelines:

- Hire Type. **Do not modify.** If this field is incorrect – then you **MUST cancel this requisition** and start over.
- Requisition Template Used. **Do not modify.** If this field is incorrect – then you **MUST cancel this requisition** and start over.
- Primary Location. If you need to make any changes to the location, you can select **Modify Structure** to make these changes.
- Organization. If you need to make any changes to the organization, you can select **Modify Structure** to make these changes. This field affects security/organization access on the requisition. Please note that the School/Department Code you use in this section must match the organization code used for the Banner Home Org and Banner Check Distribution fields above. A mismatch could result in users being blocked from seeing the requisition.
- Job Field. **Do not modify.** If this field is incorrect – then you **MUST cancel this requisition** and start over.



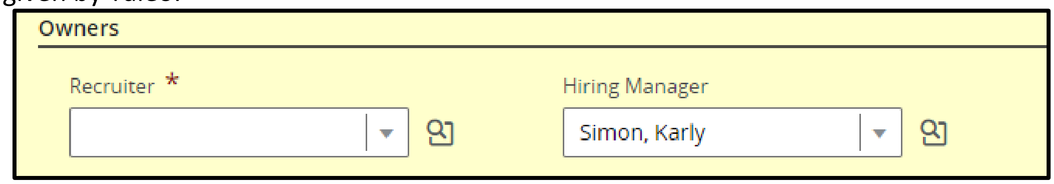
Owners

Department Recruiter

1. You will be entering the name of the **Department Recruiter** for your department. This is the person who will be **creating** and **extending the offer** and **hiring** the employee in the system. If you have the correct access, this could be yourself. Otherwise, this should be someone in your department with **Department Recruiter** access to Taleo.
2. You can start typing in the name of the **Department Recruiter**. Click on the name from the options given by Taleo.

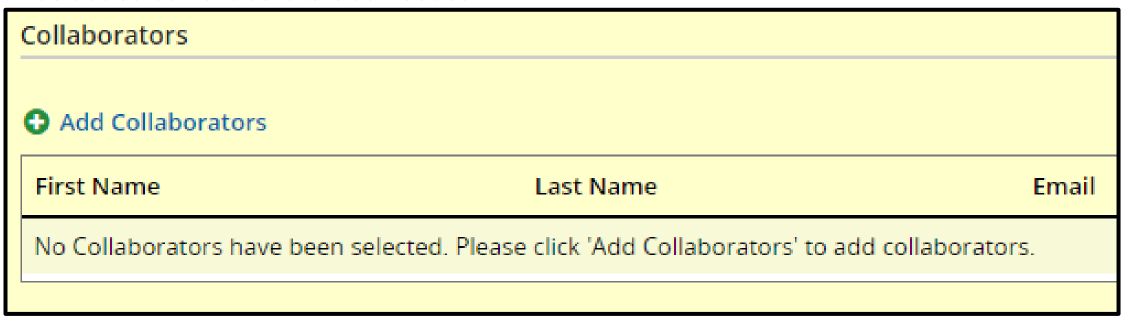
Hiring Manager

1. The second owner of a requisition is the **Hiring Manager**. This is typically the person creating the requisition, managing the requisition, and candidates up until the offer is created.
2. You can start typing in the name of the **Hiring Manager**. Click on the name from the options given by Taleo.

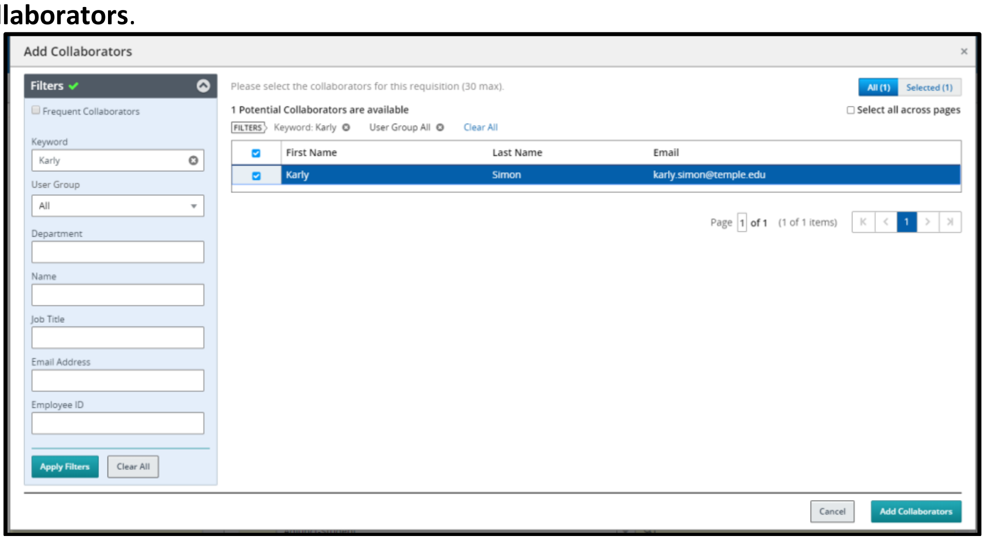


Collaborators

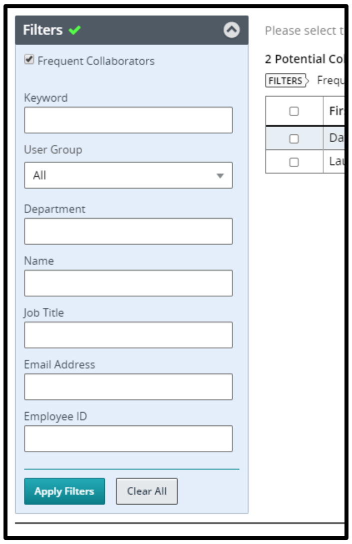
1. You may choose to add **Collaborators** to your requisition. Requisition/Offer Approvers should be added as Collaborators as needed.



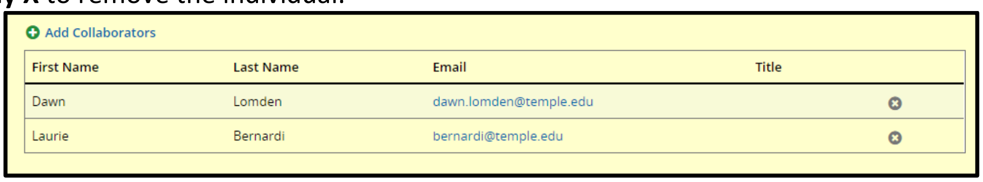
2. Select **Add Collaborators** to bring up a list of Taleo users. Use the Filters box to search for your collaborator. Select the checkbox next to your collaborator's name then select **Add Collaborators**.



3. You can also select the checkbox **Frequent Collaborators** then **Apply Filters** if you have set up your personalized list.



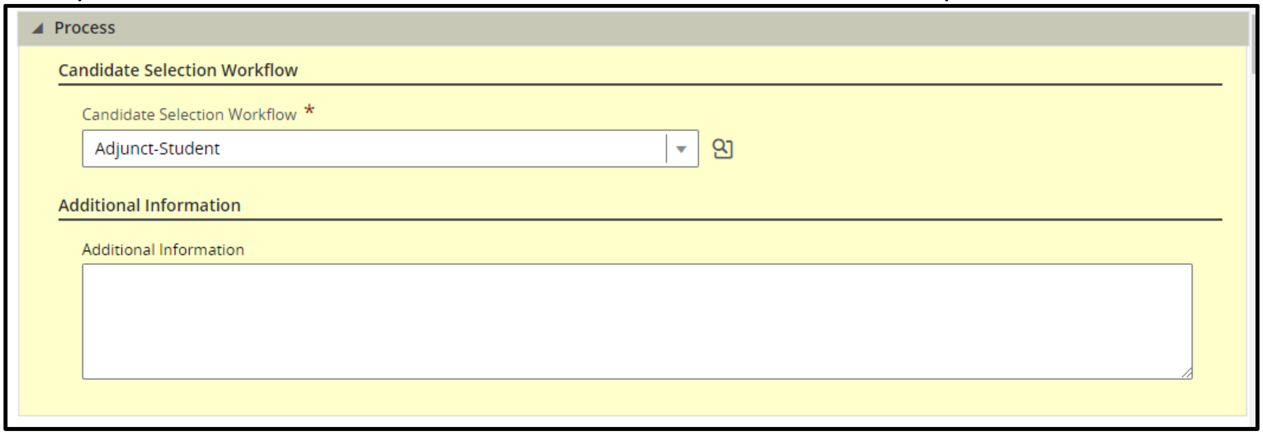
4. If one of your **Frequent Collaborators** does not need to be on this requisition, you can use the **gray X** to remove the individual.


Add Collaborators

First Name	Last Name	Email	Title	
Dawn	Lomden	dawn.lomden@temple.edu		
Laurie	Bernardi	bernardi@temple.edu		

2. Process

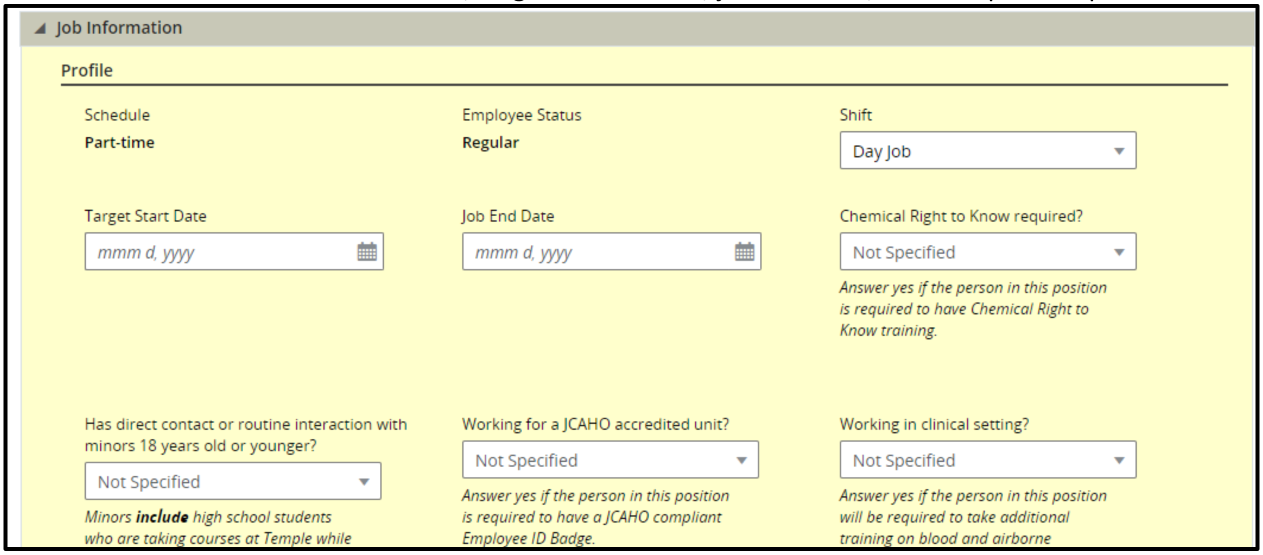
This section displays the system workflow being used. Do not change the candidate selection workflow for any reason. The **Additional Information** section is used for internal use only.



3. Job Information

Profile

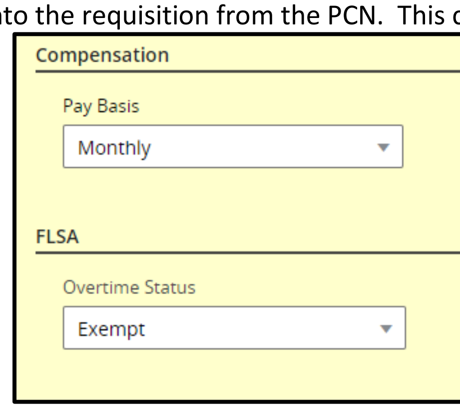
This section contains data such as shift, targeted start date, job end date, and Compliance questions.



1. **Compliance Questions**: Answers to these questions trigger processes in the background. These are required for all requisitions. **Not Specified** indicates an answer has not been given. You must choose a **Yes** or **No** answer.
2. **Target start date**: This is the first day of the teaching period
3. **Target end date**: This is the last day of the teaching period.

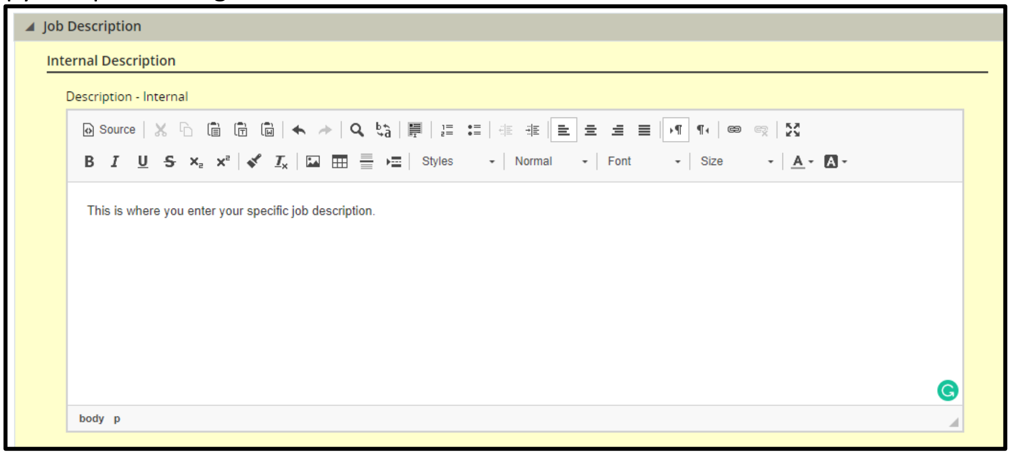
Compensation

1. The **Compensation** section displays the basis of pay for the Adjunct. All Adjunct requisitions should reflect a pay basis of **Monthly** at the requisition level. **DO NOT** make any changes to this section.
2. The **FLSA** section pulls into the requisition from the PCN. This can also be left as is.



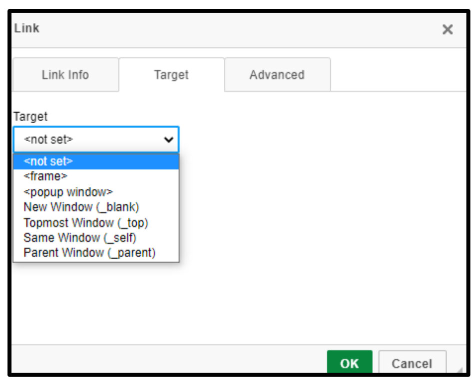
Job Description

1. For any requisition created, you need to complete the **Internal Job Description** field. You can copy and paste using the HTML editor.

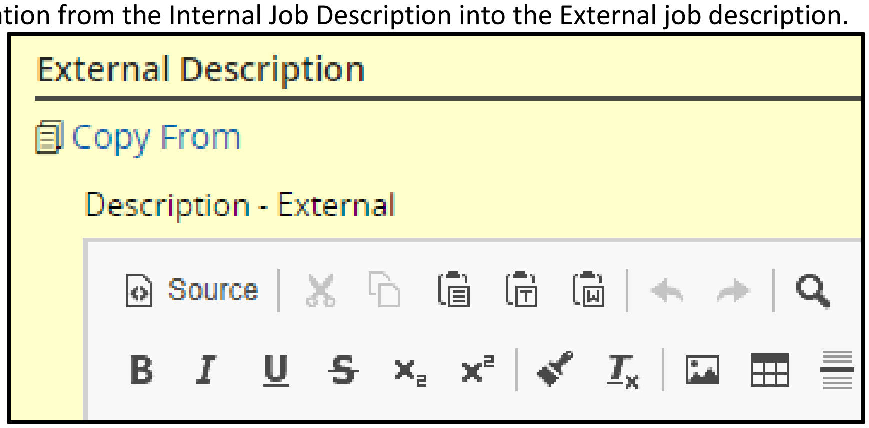


2. You have the option to paste directly into the field using the CLT+V function from your keyboard.
3. Even if you are using a generic template to create your requisition, you will need to update fields.

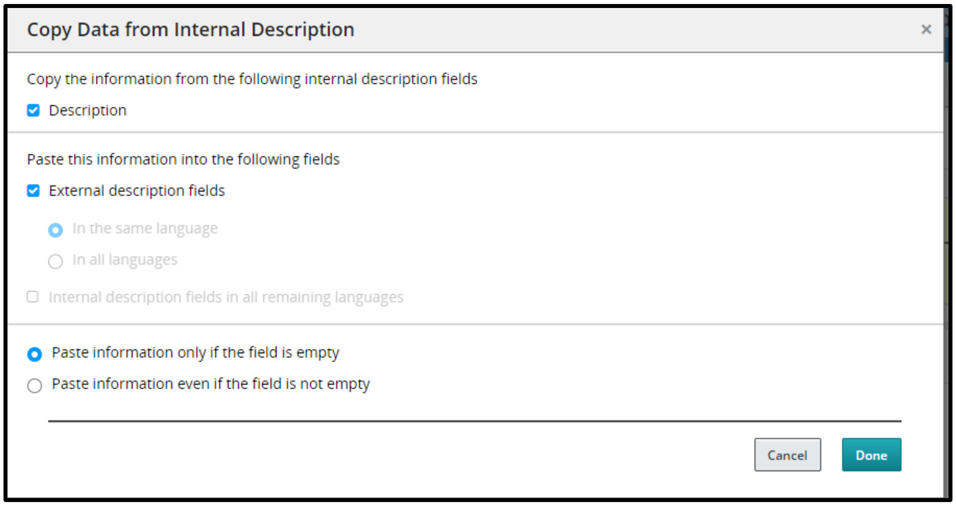
Taleo Tip: Use the link icon to create URLs or hyperlinks in the description field. Select the link type and enter the appropriate information. If you created a link for a URL, be sure to set the **Target** before completing the link creation.



4. If you need to post the position externally you can use the **Copy From** function to copy the information from the Internal Job Description into the External job description.

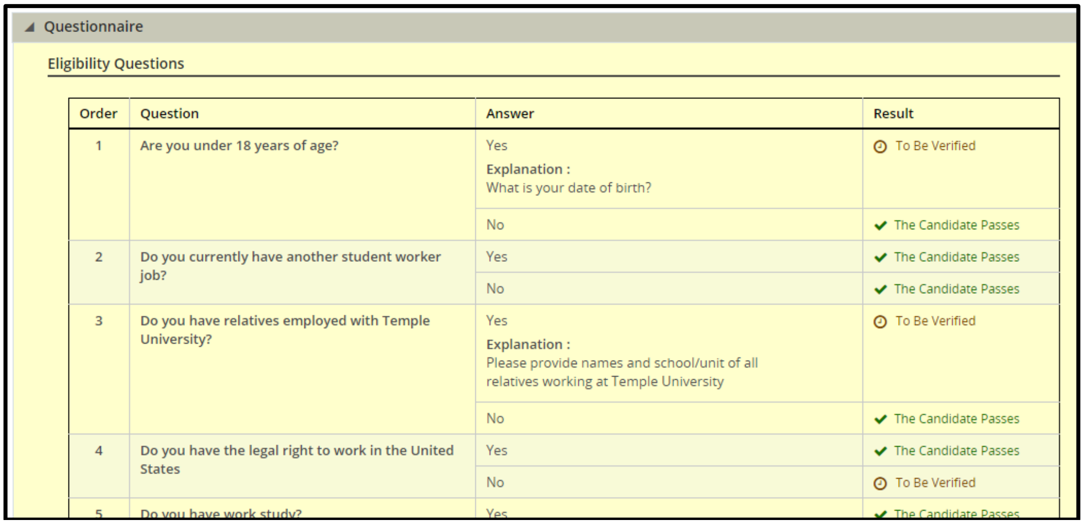


5. Select **Done** to bring the information from the Internal field into the External Field.


Copy Data from Internal Description
Copy the information from the following internal description fields
Description
Paste this information into the following fields
External description fields
In the same language
In all languages
Internal description fields in all remaining languages
Paste information only if the field is empty
Paste information even if the field is not empty
Cancel
Done

Questionnaire

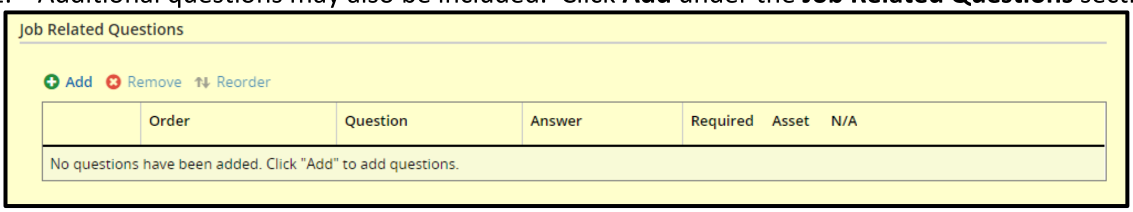
This section displays questions to be answered by the candidate who is applying to a requisition. The **Eligibility Questions** will be utilized on all requisitions. The applicant's selected answer will have a **green checkmark**.


Questionnaire

Eligibility Questions

Order	Question	Answer	Result
1	Are you under 18 years of age?	Yes Explanation : What is your date of birth?	To Be Verified
		No	The Candidate Passes
2	Do you currently have another student worker job?	Yes	The Candidate Passes
		No	The Candidate Passes
3	Do you have relatives employed with Temple University?	Yes Explanation : Please provide names and school/unit of all relatives working at Temple University	To Be Verified
		No	The Candidate Passes
4	Do you have the legal right to work in the United States	Yes	The Candidate Passes
		No	To Be Verified
5	Do you have work study?	Yes	The Candidate Passes

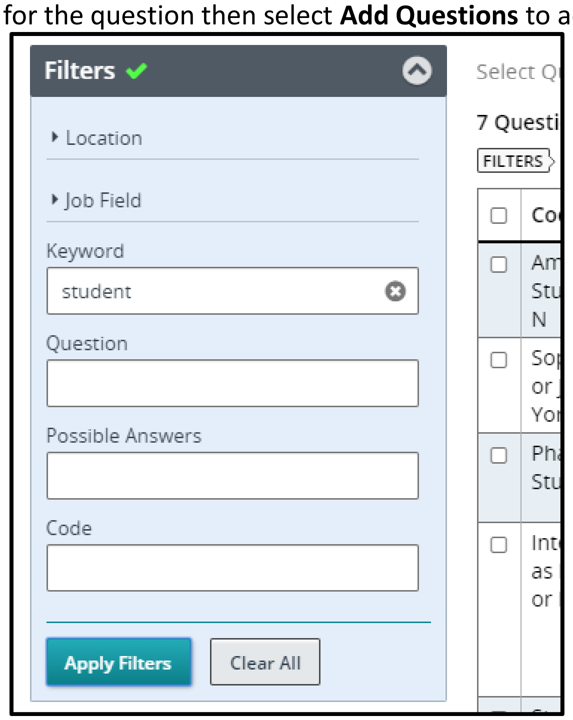
1. Additional questions may also be included. Click **Add** under the **Job Related Questions** section.


Job Related Questions

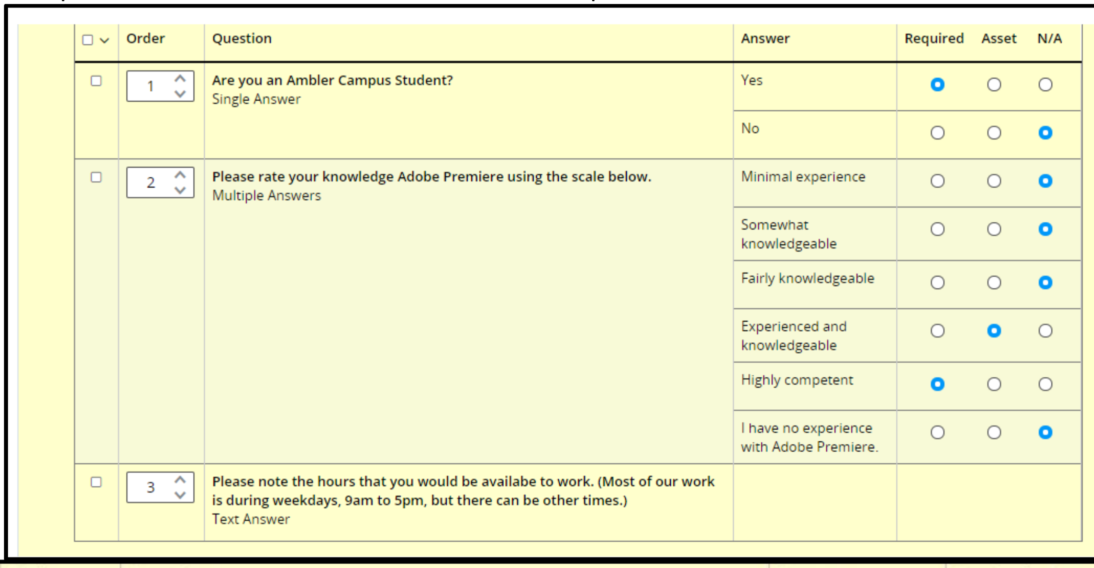
Add Remove Reorder

	Order	Question	Answer	Required	Asset	N/A
No questions have been added. Click "Add" to add questions.						

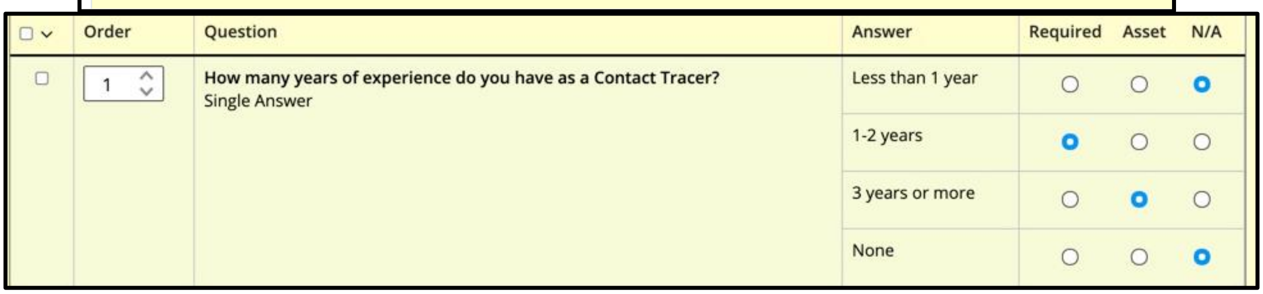
2. Utilizing a keyword you can use the **Quick Filters** on the left to find a question you want to add. Select the checkbox for the question then select **Add Questions** to add your questions.



3. Once the questions are added, choose **Required** for the applicable answer from the radio buttons on the right-hand side of the page. This will indicate to the system which answer meets requirements. If you select **Asset** this will be a response that goes above and beyond requirements. There can be more than one response marked as an Asset.



Order	Question	Answer	Required	Asset	N/A
1	**Are you an Ambler Campus Student?** Single Answer	Yes	●	○	○
		No	○	○	●
2	**Please rate your knowledge Adobe Premiere using the scale below.** Multiple Answers	Minimal experience	○	○	●
		Somewhat knowledgeable	○	○	●
		Fairly knowledgeable	○	○	●
		Experienced and knowledgeable	○	●	○
		Highly competent	●	○	○
		I have no experience with Adobe Premiere.	○	○	●
3	**Please note the hours that you would be availabe to work. (Most of our work is during weekdays, 9am to 5pm, but there can be other times.)** Text Answer				

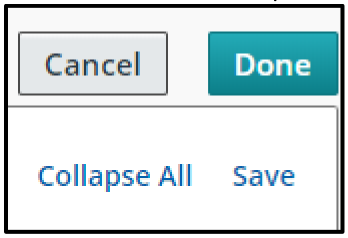


Order	Question	Answer	Required	Asset	N/A
1	**How many years of experience do you have as a Contact Tracer?** Single Answer	Less than 1 year	○	○	●
		1-2 years	●	○	○
		3 years or more	○	●	○
		None	○	○	●

Saving a Requisition

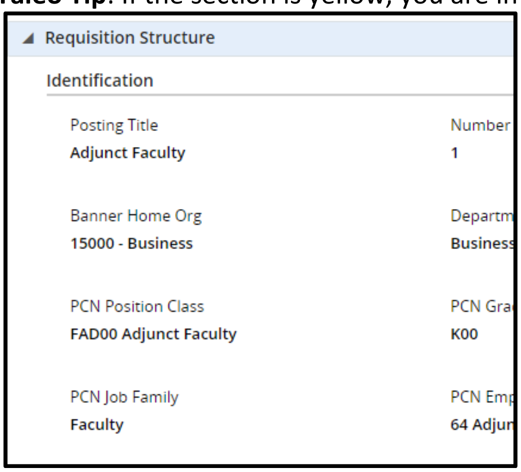
All fields should be filled in and the requisition should be ready for approval. If you are still in the editing mode, at the top of your page, you will have four options.

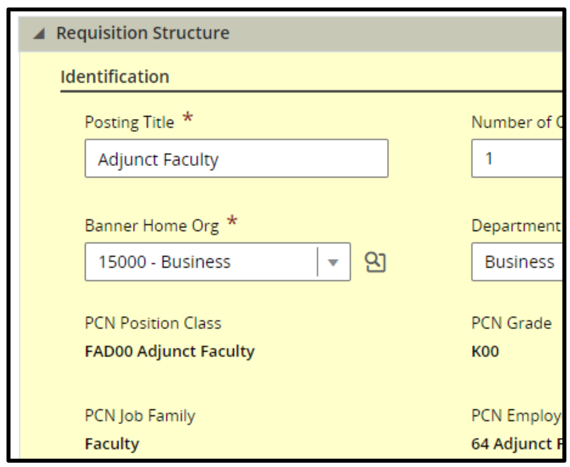
1. **Cancel**: exits out of the requisition without saving changes.
2. **Done**: Save and collapses the various sections of the requisition.
3. **Save**: can be used throughout creating the requisition to ensure your work is being saved as you complete the fields.
4. **Collapse All**: collapses the various sections of the requisition



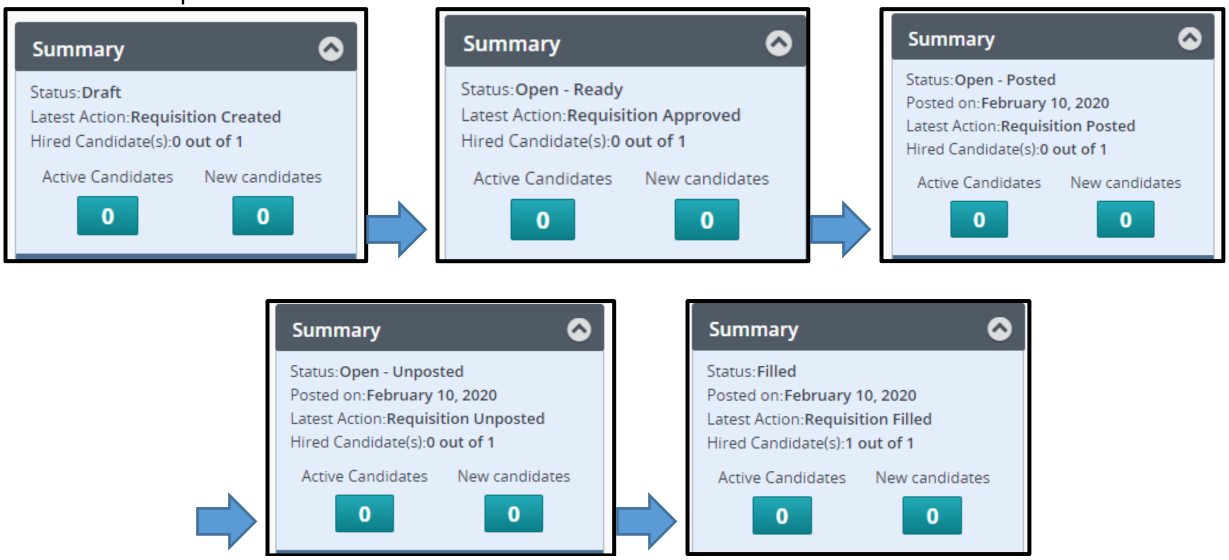
Taleo Tip: If you save your requisition before it is complete and will need to return to it, you will need to edit to make changes. Once a requisition is open and approved, the Edit button will no longer be available. The **Edit All** button will open each field of the requisition. The **Pencil Icon** will open that specific section to edit.

Taleo Tip: If the section is yellow, you are in the editing mode.

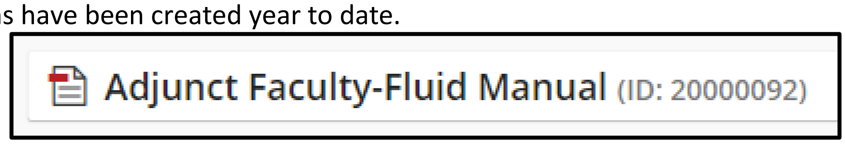




Taleo Tip: As you move through the requisition, the **status box** on the left will update and display the status of the requisition.

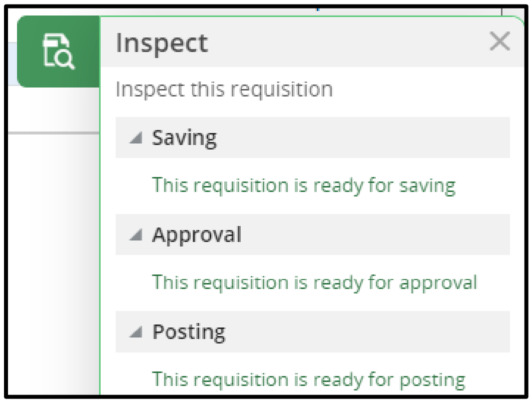


Taleo Tip: Each requisition has a unique number that is used to identify the requisition. This can be found next to the posting title once the requisition has been saved. The first two numbers of the requisition number are for the year the requisition was created. The six numbers following are how many requisitions have been created year to date.

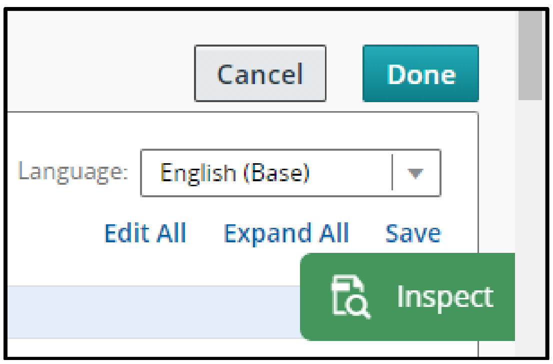


Inspect Tool

1. Use the green **Inspect** tool to review your progress. If any field requires information, it will be listed in the **Inspect Tool**.



2. Select **Save** to review your requisition in the editing mode or select **Done** to save and close out of the editing mode.

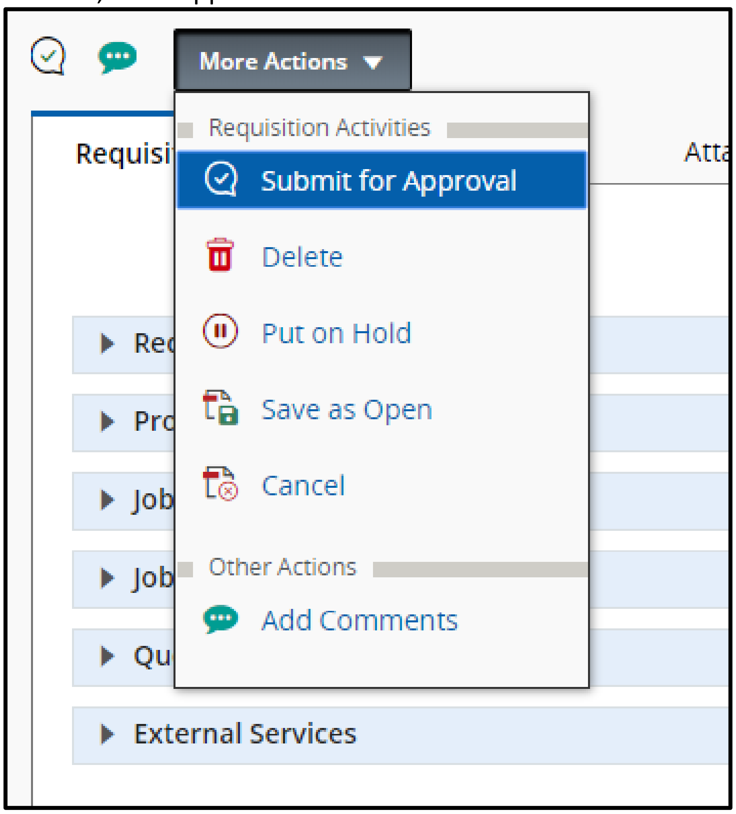


3. You can use the **Edit All** or **Expand All** button to make any changes. If you save your requisition before it is complete and need to return to it, you can select the **Edit** button to make changes. Once a requisition is open and approved, the **Edit** button will no longer be available.
4. If you are in the editing mode, select the specific item that needs to be completed to be brought directly to that section. Once all items have been completed, select **Done, which is** located at the top right-hand side of the requisition. Now that the requisition is ready for approval, the **Inspect Tool** will read **File ready for approval**.

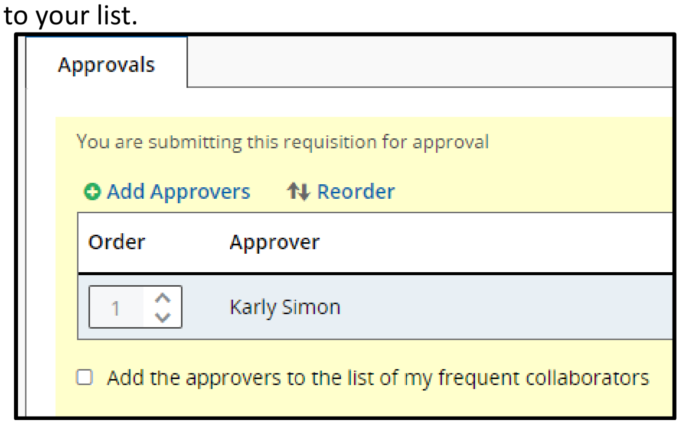
Taleo Tip: This tool is critical when determining why you are unable to save a requisition.

Requesting Approval for Requisition

1. If you are a **Department Recruiter** and have the appropriate authority to approve a requisition, then you can **self-approve** a requisition by selecting the **Request Approval** from **More Actions**.
2. If you are a **Hiring Manager**, the system will default to your **Department Recruiter** as the first approver. If the position is **grant-funded**, then you must add your **Research Administration** contact, Elyse Castillo, as an approver.

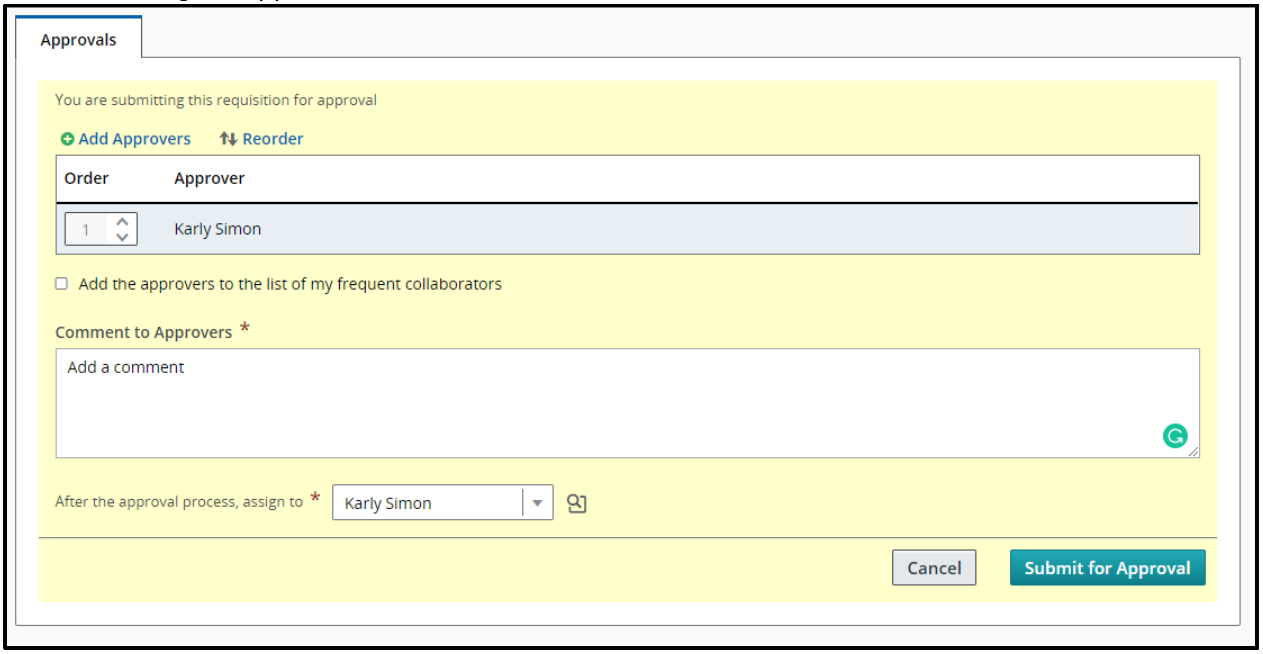


3. To add department approvers, select **Add Approvers**. You can search for approvers in the new window to add to your list.



Taleo Tip: If your requisition is a grant-funded position, you must include your Research Administration contact, Elyse Castillo, to your approval path as the final approver.
Taleo Tip: If you typically have the same approvers for every requisition, you can check the checkbox to **Add the approvers to the list of my frequent collaborators**. Then when you select Add Approvers, you only need to check the Frequent Collaborators box to sort through your list of Frequent Collaborators.

4. When you are ready to request approval, add a comment in the comment box and select **Submit for Approval**. An email will be sent to the **Department Recruiter** to approve the requisition, starting the approval chain.



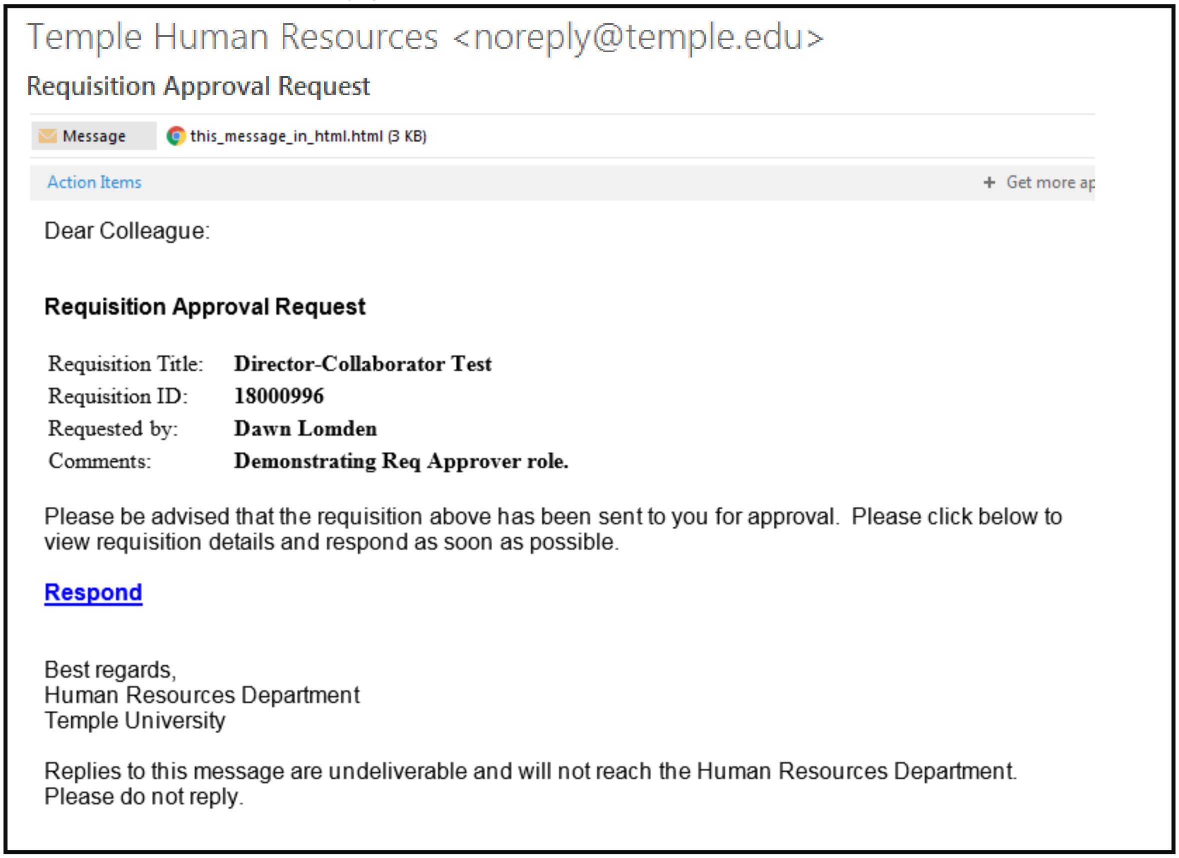
5. If you are the **Department Recruiter** on the requisition you have created, your name will appear first in the **Request Approval** box. Your approval will be given automatically since you created the requisition.

Taleo Approver Role

Requisition approvers in Taleo can review requisitions sent to them for approval. After reviewing the information on the requisition, respond with your approval and leave comments for other approvers. This can be done from the approval email or from the online website.

E-mail

1. When a requisition is sent for approval, you will receive an email from Temple Human Resources, via a "**No Reply**" email address.



Temple Human Resources <noreply@temple.edu>

Requisition Approval Request

Message this_message_in_html.html (3 KB)

Action Items + Get more ap

Dear Colleague:

Requisition Approval Request

Requisition Title:	**Director-Collaborator Test**
Requisition ID:	**18000996**
Requested by:	**Dawn Lomden**
Comments:	**Demonstrating Req Approver role.**

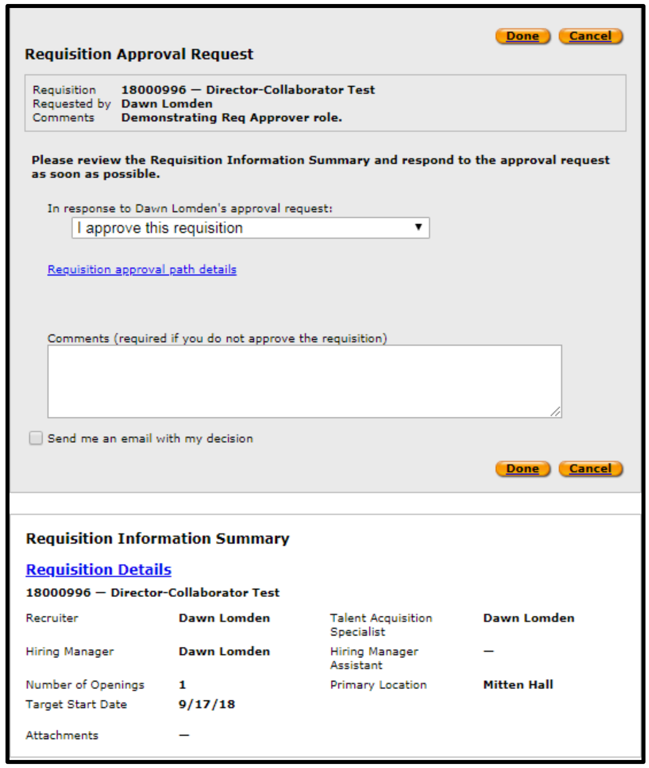
Please be advised that the requisition above has been sent to you for approval. Please click below to view requisition details and respond as soon as possible.

Respond

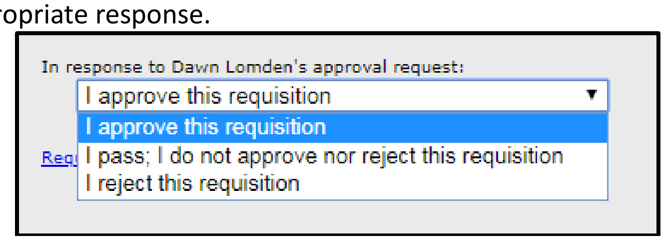
Best regards,
Human Resources Department
Temple University

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

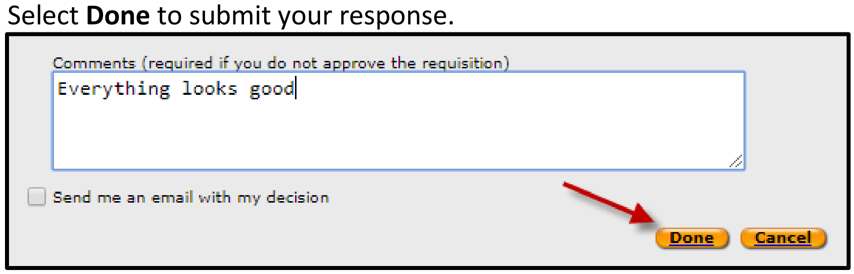
2. The requisition title, ID number, and comments will be visible in the body of the email, along with the name of the person requesting approval.
3. Select **Respond** in the body of the email.
4. At the bottom of the page, select **Requisition Details** to review the requisition information on a new page.



5. After reviewing the requisition details, go to the dropdown menu in the middle of the page to choose the appropriate response.



6. Finally, provide a comment if necessary for other requisition approvers and requisition owners to view. Select **Done** to submit your response.

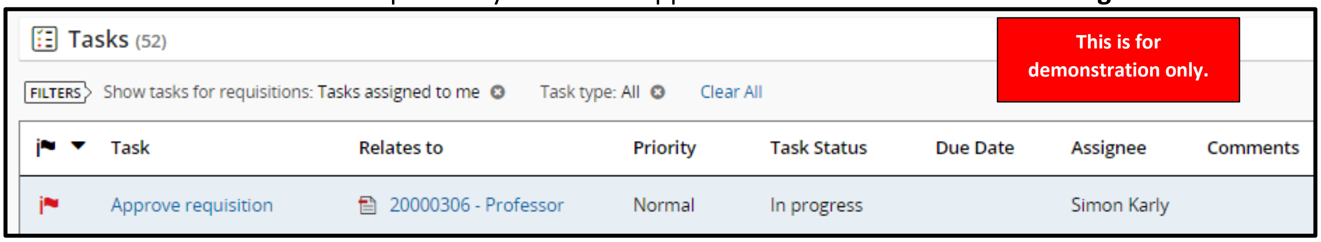


Taleo System

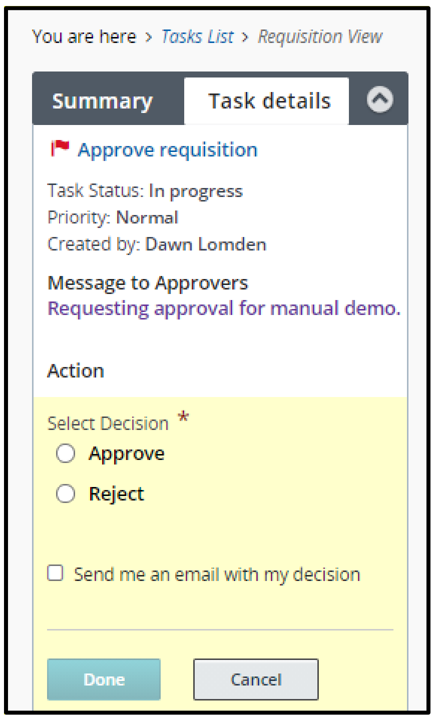
As an approver, you can also log into the Taleo website to view requisitions to approve or reject them.

1. To access Taleo, select the **Taleo Talent Management System** link in TUPortal, under TUApplications. Then select **Recruiting** to open your main page of Taleo.
2. Once you are logged in, select **Tasks** to be taken to a list of the requisitions you have access to.

3. Select the title of the requisition you need to approve. It will have a status of **In Progress.**



4. When the requisition opens, you can review the requisition information. After reviewing the requisition, on the left-hand side, select your approval decision. If needed, provide a comment, then select **Done**.

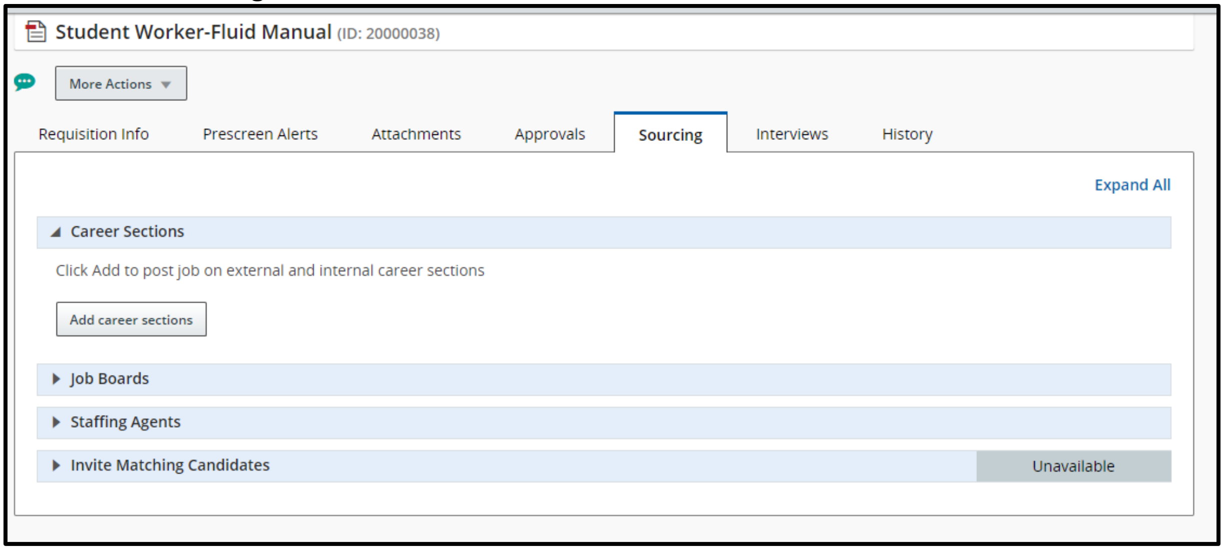


Sourcing

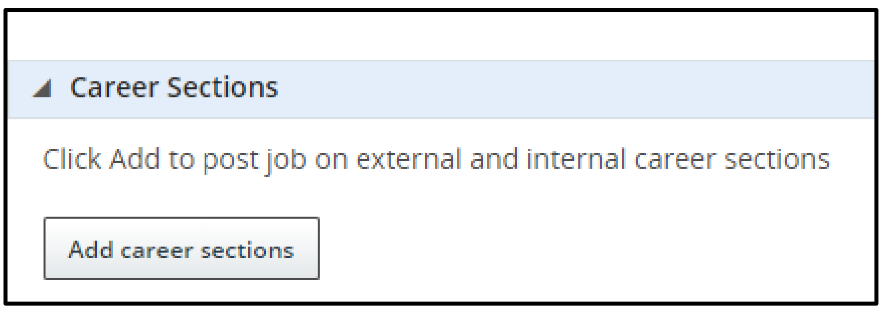
Posting a Position

This is an optional step for Adjuncts if you do not wish to post the job, this can be skipped and candidates can be matched to the requisition by the Hiring Manager or Department Recruiter.

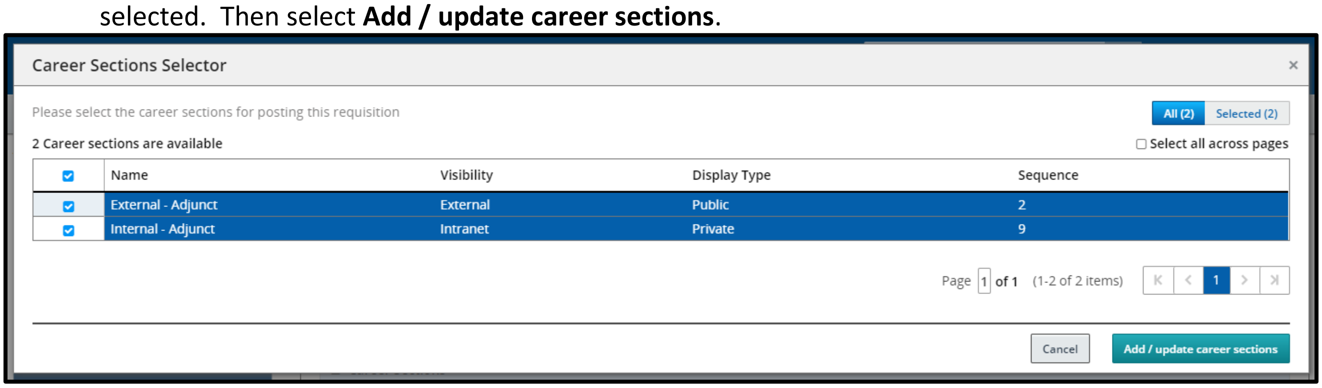
1. Navigate to your approved requisition and open it. From the titles across the top of the page, select **Sourcing**.



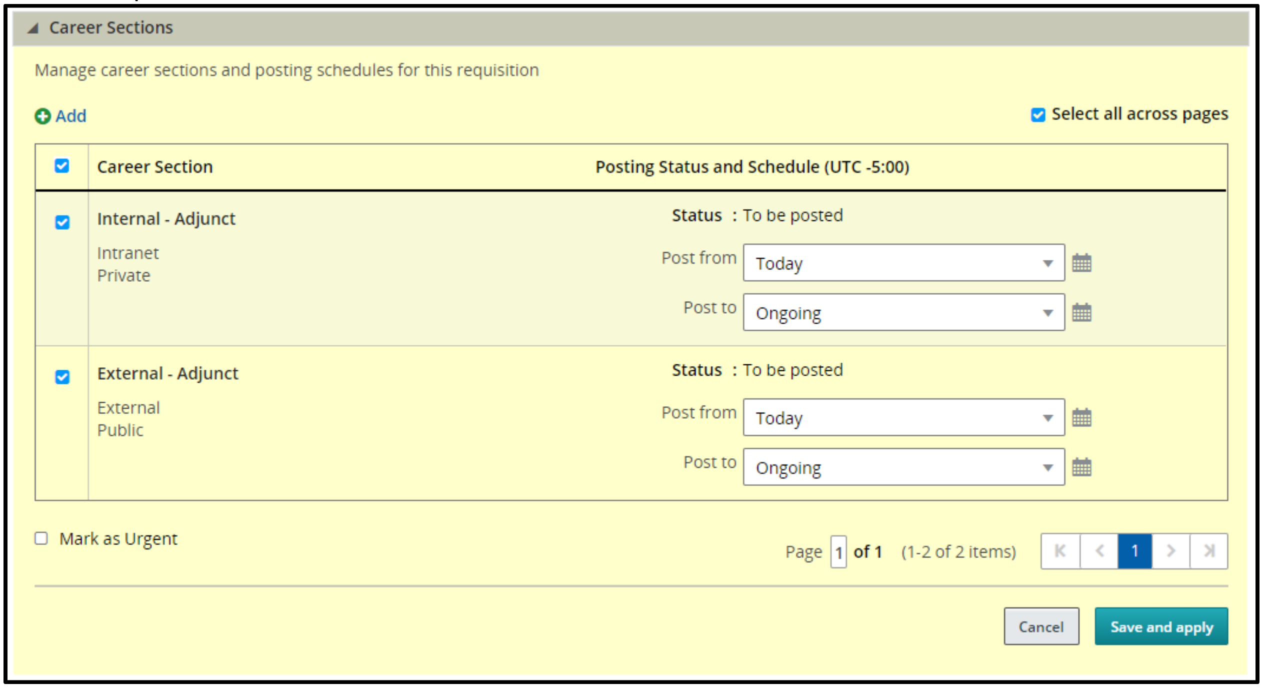
2. Once in **Sourcing**, locate **Career Sections** at the top of the page. Select the **Add career sections** button.



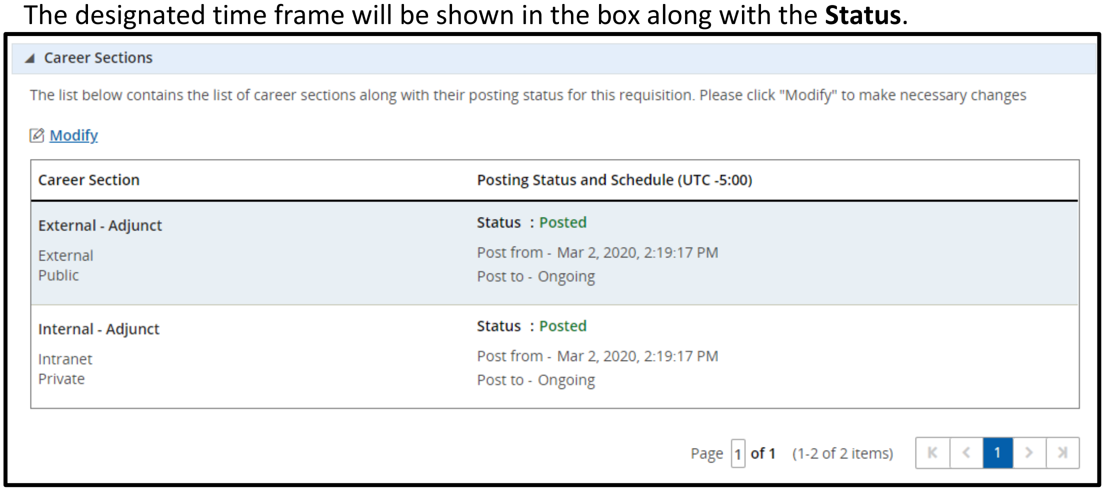
3. A box called **Career Sections Selector** will open. Ensure the specific career section checkbox is selected. Then select **Add / update career sections**.



4. You can choose when to post the requisition, **Post from**, and when it should be taken down, **Post to**. Use the drop-down menus to pick from a range of timeframes or use the calendar icon next to each drop-down to pick a specific date. Then select **Save and apply** to post the requisition.



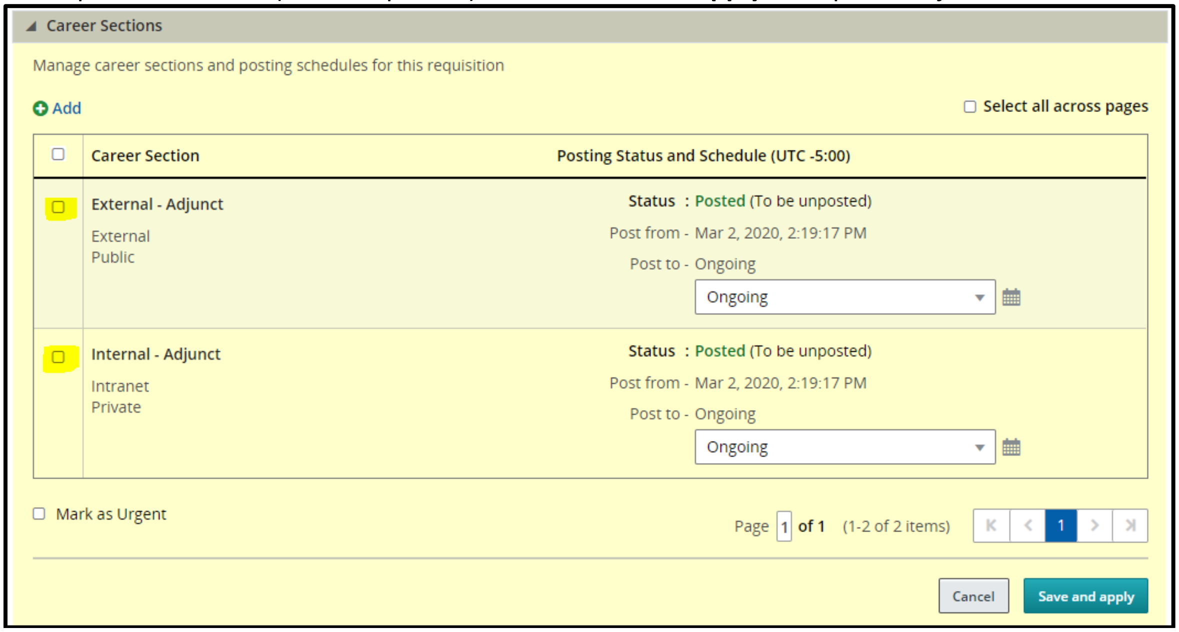
5. The designated time frame will be shown in the box along with the **Status**.



6. If you want to make any changes to the posting dates, you can go to the **Sourcing** tab in your requisition at any time. The **Modify** button will be available to you. You can extend or shorten an end date at any time.

Unposting a Position

1. To unpost a position and remove it from the job site, you can use the **Modify** button to open the **Career Section** window. **Uncheck the box** on the left side of the window. Your Status will update to Posted (To be unposted). Select **Save and Apply** to unpost the job.



2. After a job has been unposted, you can use the **Modify** button to repost the job if needed.

Searching a Candidate

There are two ways you can search for your candidate.

Candidate Quick Search

1. In the Quick Search box ensure your field is set to **Look up a candidate**.

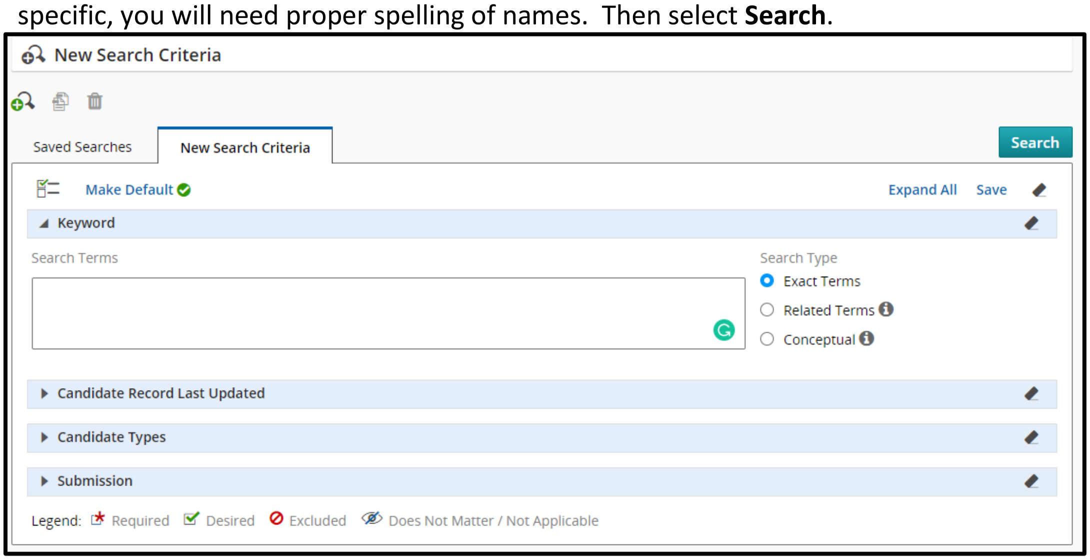
2. Type your candidate's name.
3. Select the **magnifying glass** or **Enter** on your keyboard to generate the search.

Taleo Tip: Always use the candidate's first and last name. This will help identify candidates with duplicate profiles. Using a TUID could bring up an incorrect profile due to duplicate profiles.

Find Candidates

1. From the menu, use the **Find Candidates** section to search for candidates.

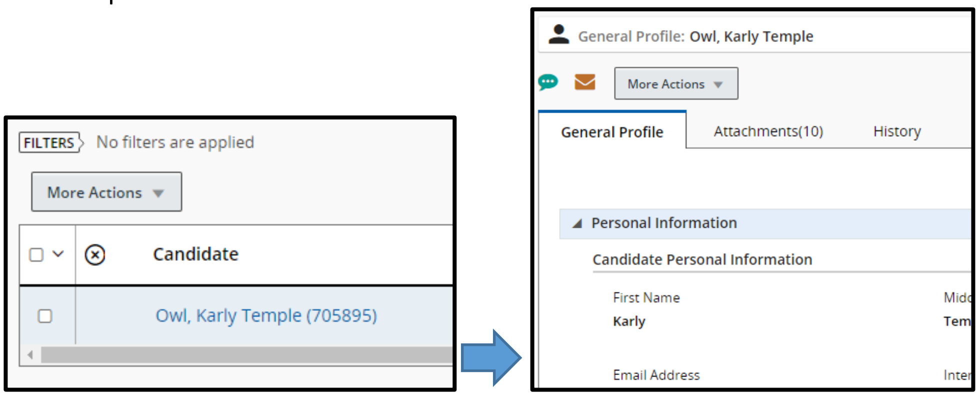
2. In this search box, enter the name of the candidate you are searching for. The search function is specific, you will need proper spelling of names. Then select **Search**.



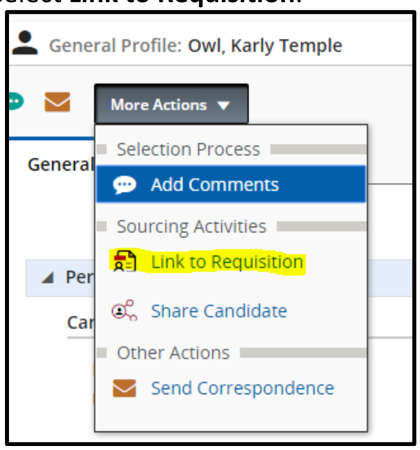
3. The name you searched will return results. If there is more than one profile for your candidate, all names will appear. Make sure you are selecting the appropriate profile.

Linking a Candidate to a Requisition

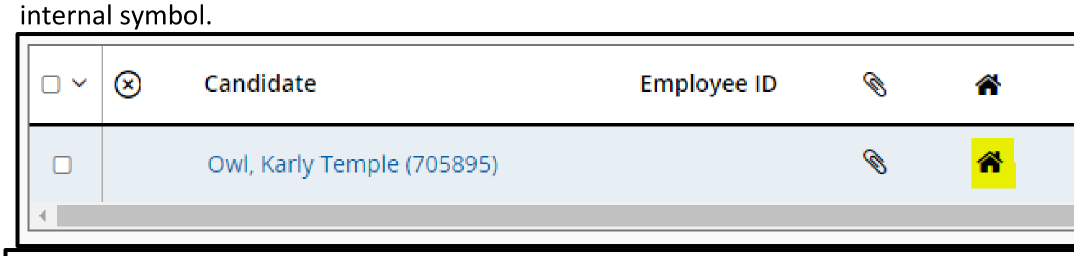
1. Select the checkbox of the name of the candidate you wish to match to your requisition to access their profile.

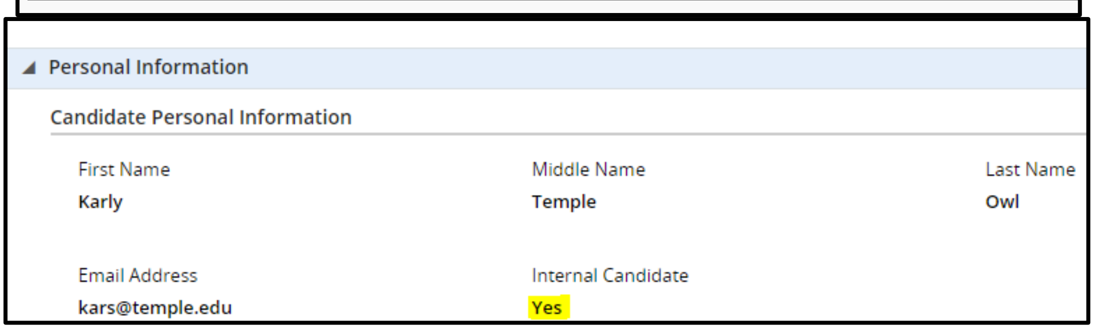


2. Then from **More Actions**, select **Link to Requisition**.

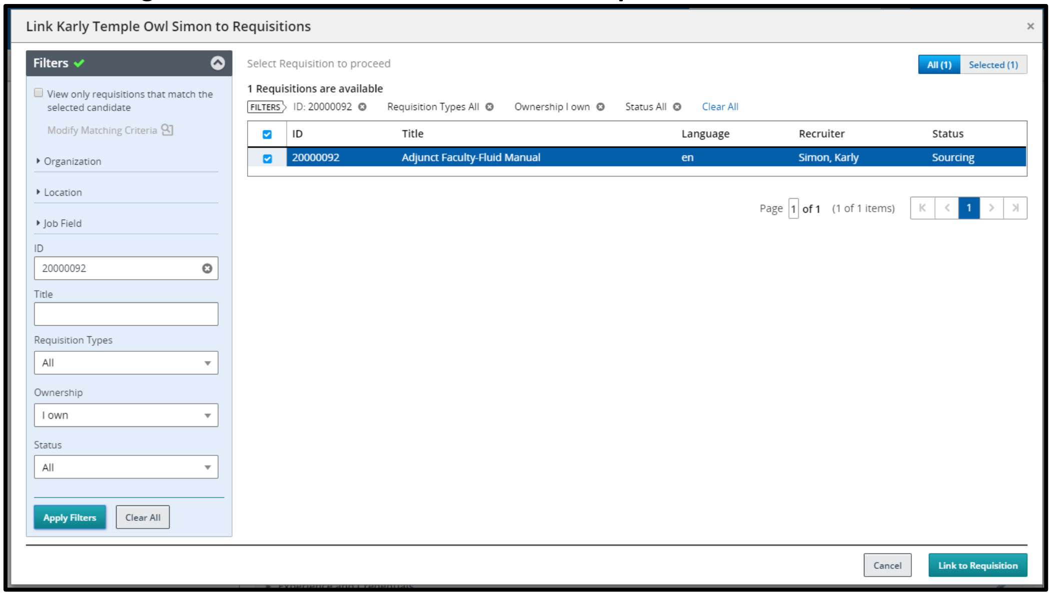


3. Internal candidates will be shown with a **house** icon. Within the profile, the **Internal Candidate** section will be indicated with a **Yes** response. All students or internal employees should have an internal symbol.

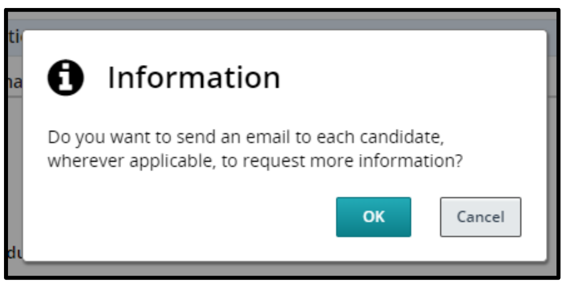




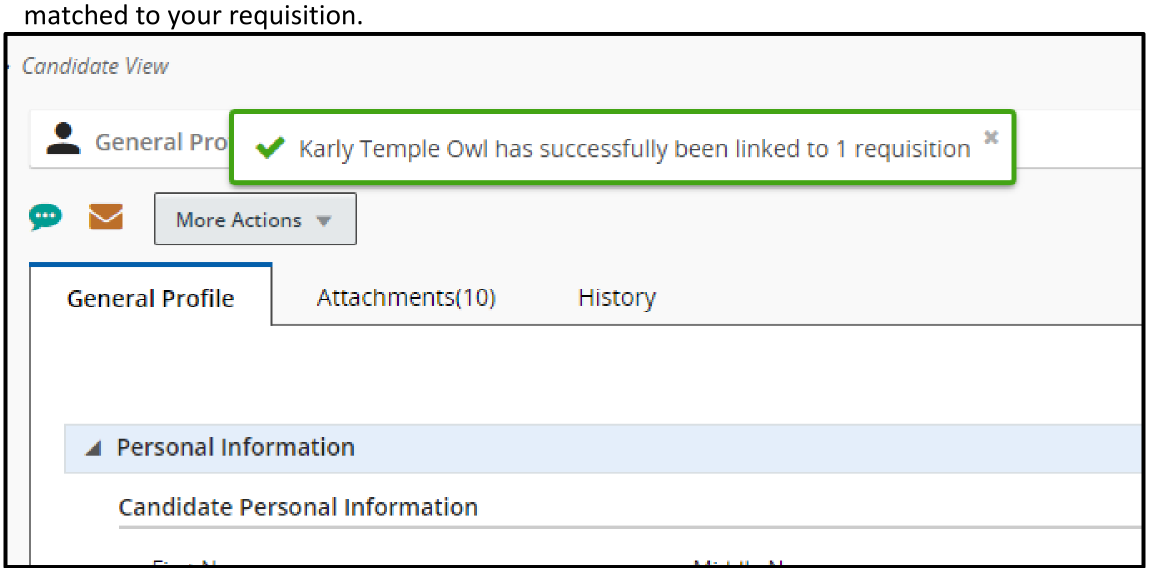
4. After selecting the **Link to Requisition**, a pop-up box will appear with a list of your requisitions. Select the checkbox next to the requisition (requisition ID = Requisition Number) to which you are matching the candidate. Then select **Link to Requisition**.



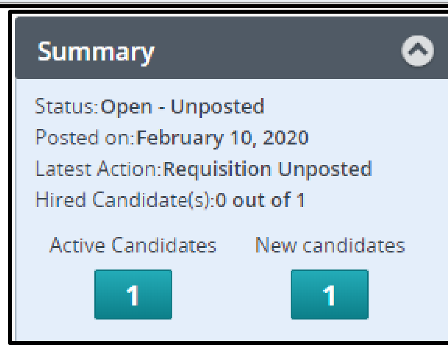
5. After clicking **Done**, a pop-up box will ask if you want to send an email to the candidate. Select **Cancel**, since the e-mail will invite the candidate to apply for the job that you have already linked them to.



6. The window will close and you will receive a notification stating your candidate has been matched to your requisition.



7. Navigate back to your requisition. It will now show a new candidate has been added.

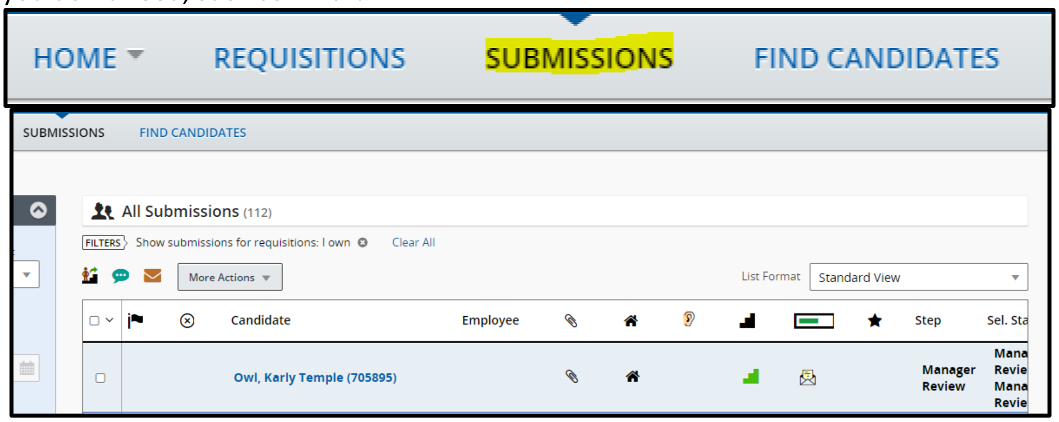


Viewing Candidates

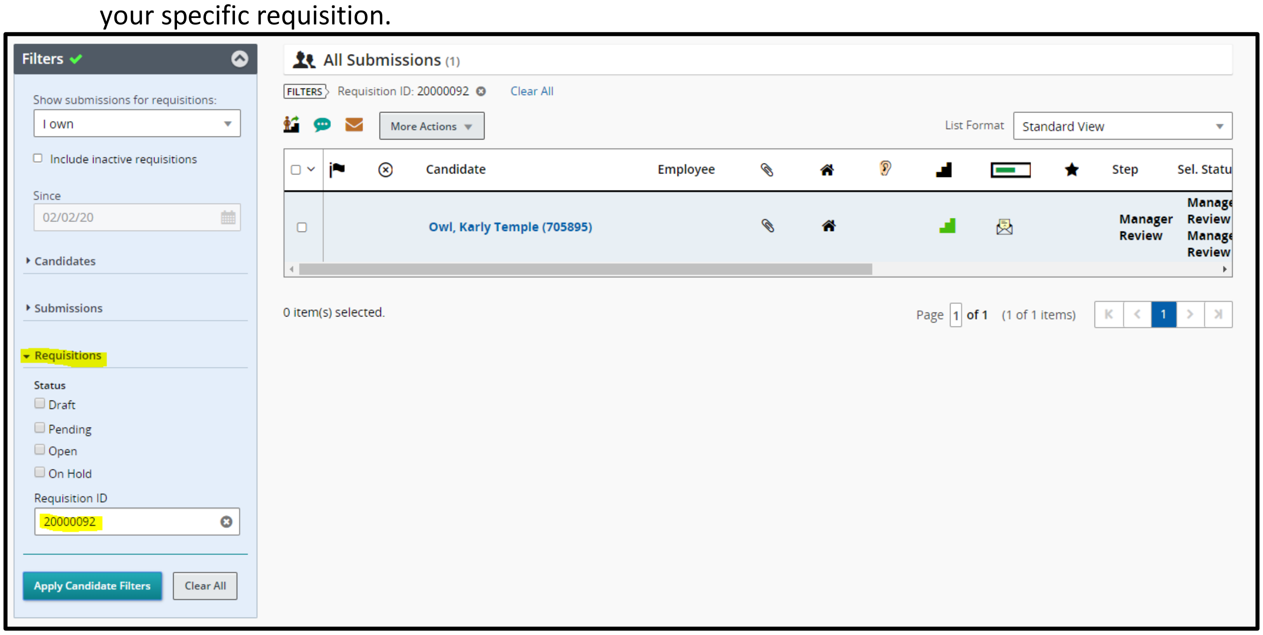
After candidates have either been matched or applied to your requisition, you will be able to view them in Taleo. You can navigate to candidates in two ways **Submissions** and **Requisitions**:

Submissions

1. **Submissions**: Navigate from your dashboard to your **Submissions** by selecting the **Submissions** title in your menu bar. Note that there are default filters set which impact your search results, and may give you the false impression that there are no results. Be sure to remove those filters you don't need, such as "Draft."

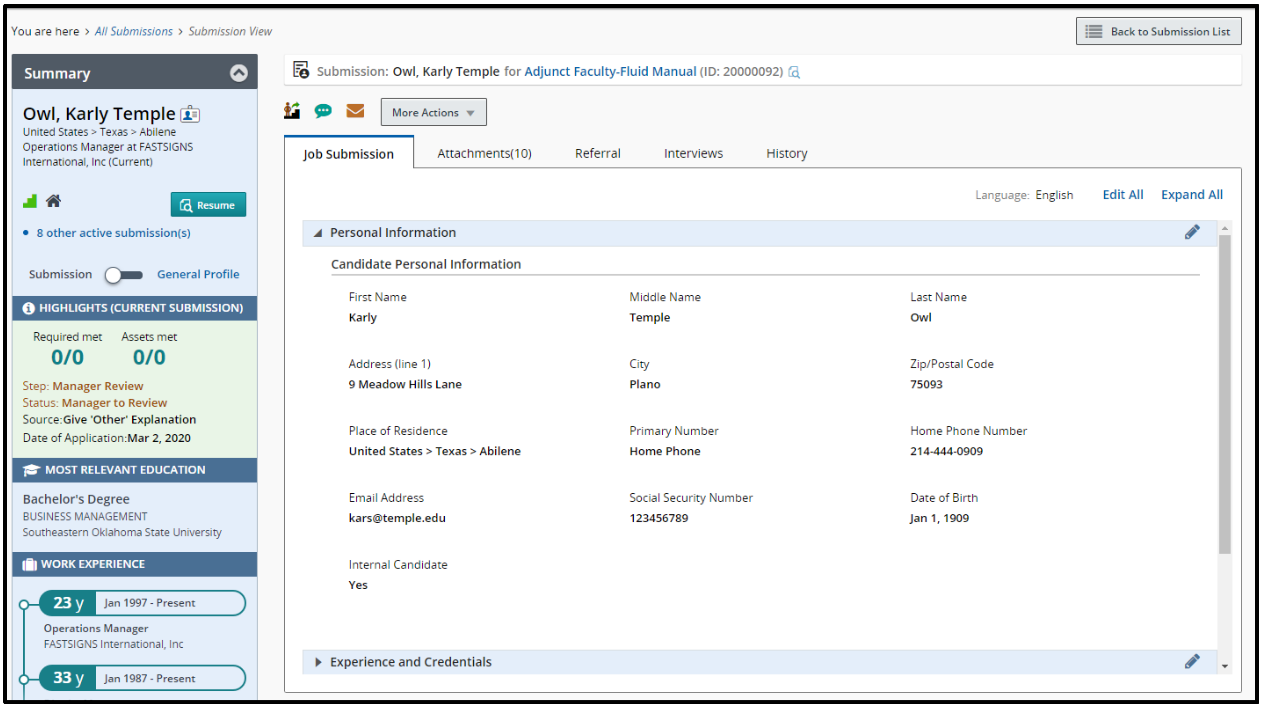


2. Using the **Filters** function, set the parameters to narrow down the submissions results down to your specific requisition.



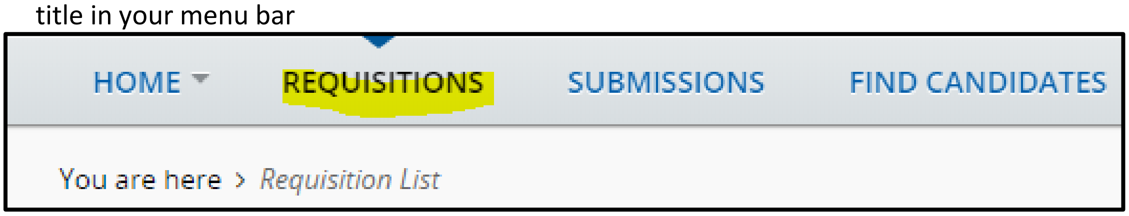
Taleo Tip: Search for candidate submissions using the **Requisition ID** number.

3. Once your results populate, you will be able to see the candidates that applied to your specific requisition. Select the candidate's name to view their specific profile within the requisition.

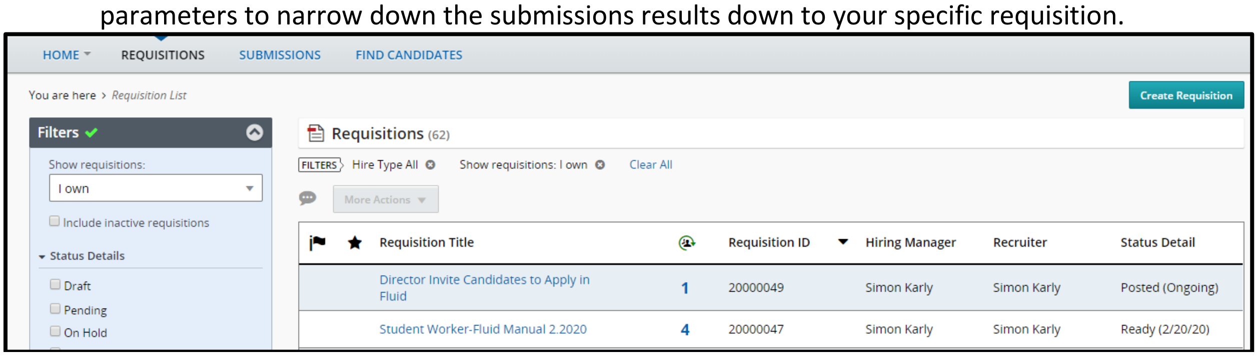


Requisitions

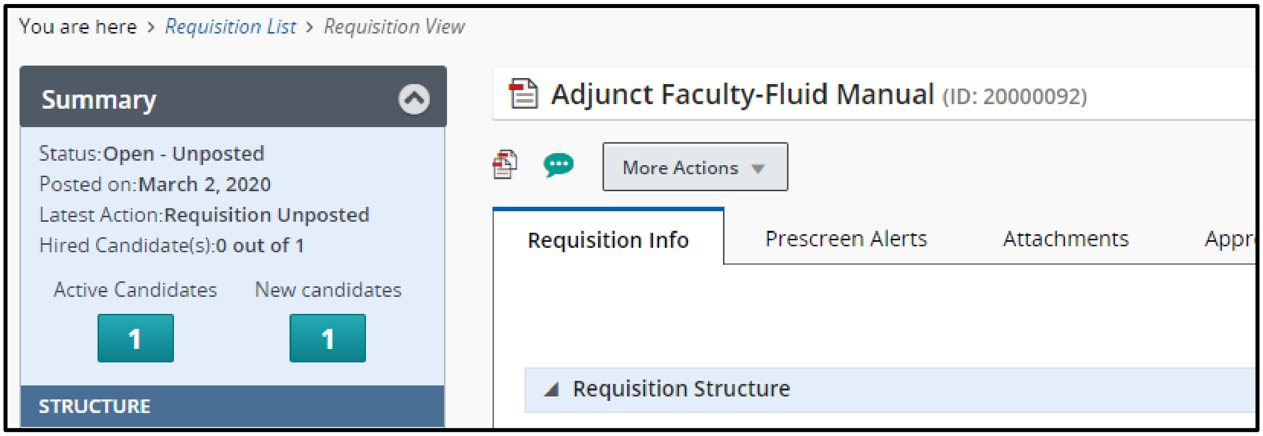
1. **Requisitions**: Navigate from your dashboard to your Requisitions by selecting the **Requisition** title in your menu bar



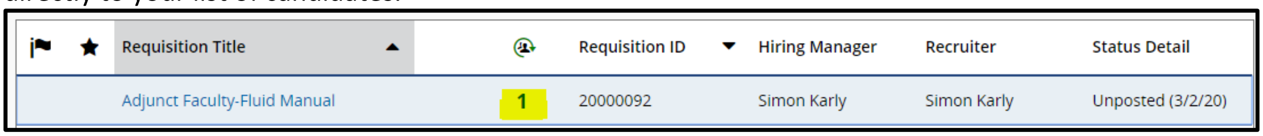
2. A list of active requisitions will show on the screen. You can use the **Filters** function to set the parameters to narrow down the submissions results down to your specific requisition.



3. Select the title of your requisition to be brought to your requisition.
4. You can select the number of active candidates or the number of new candidates to view your candidates.



Taleo Tip: From the list of requisitions you can select the specific number of candidates to be brought directly to your list of candidates.

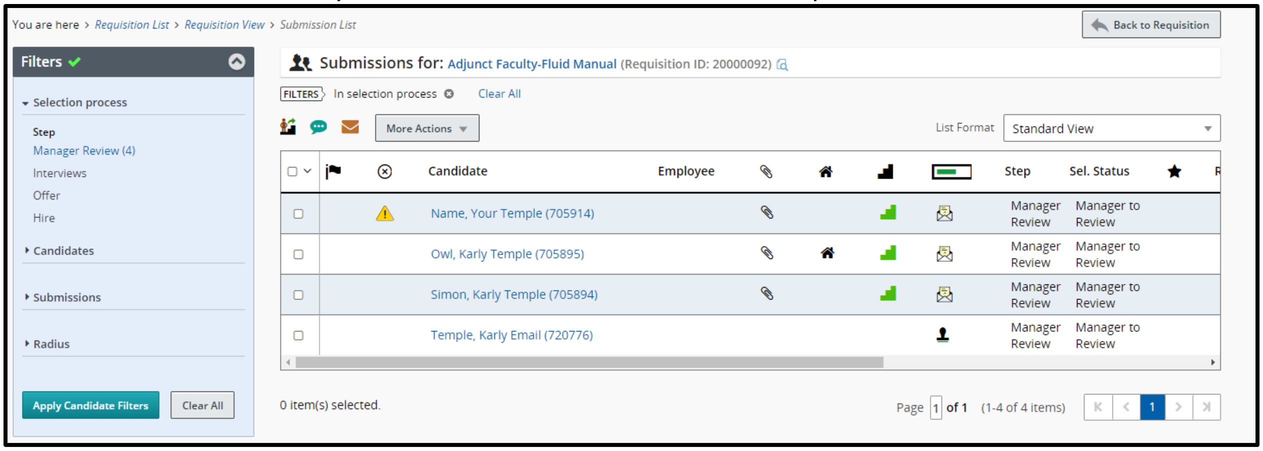


Changing Step/Status of Candidates

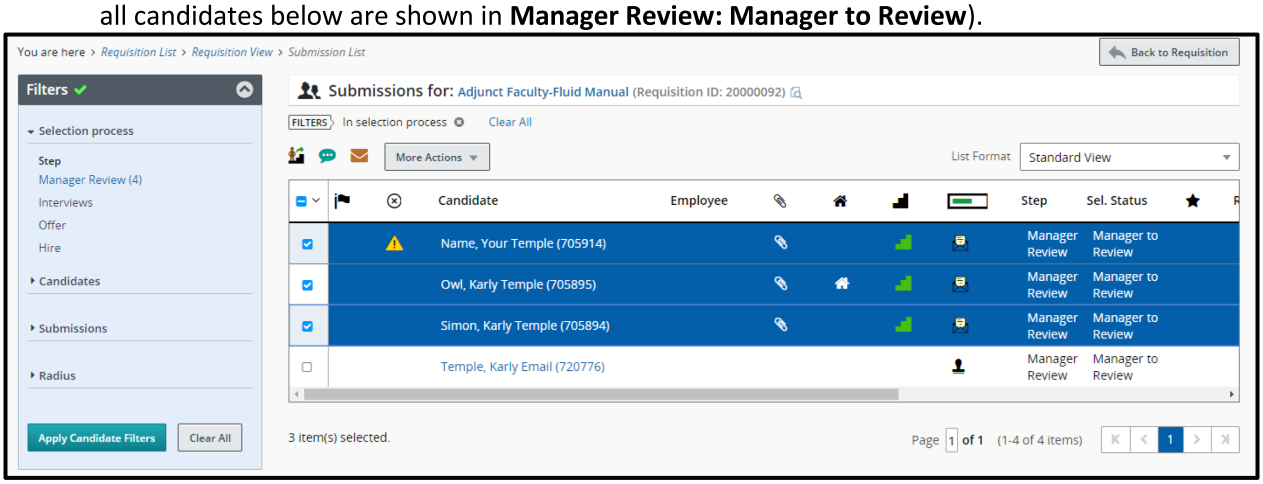
Navigate to your requisition and click on the blue number of candidates to view the candidate list. All new candidates should appear in the Step/Status of **Manager Review: Manager to Review**. You can move candidates through the process in groups or one at a time.

Moving Candidates in Groups

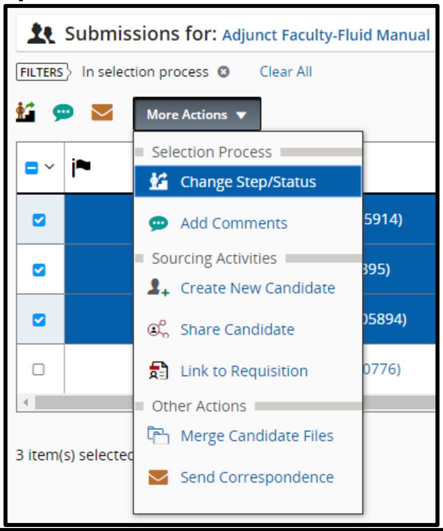
1. For some jobs, the Hiring Manager or Department Recruiter may wish to move multiple candidates at one time. To do so, ensure you are viewing the candidate list for your requisition and the candidates you wish to move are all in the same step/status.

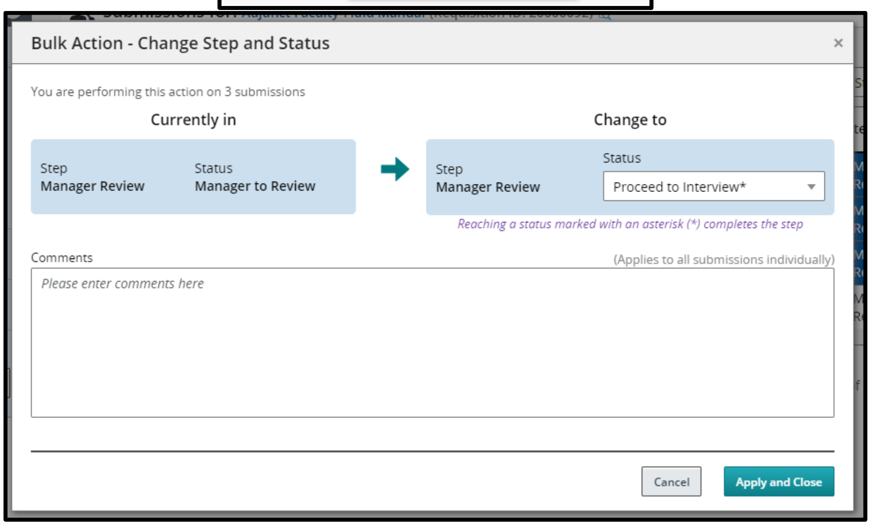


2. Check off all candidates to be moved to the next Step/Status. All candidates chosen will be moved to the same point in the process. Candidates must all start at the same step/status (i.e. all candidates below are shown in **Manager Review: Manager to Review**).

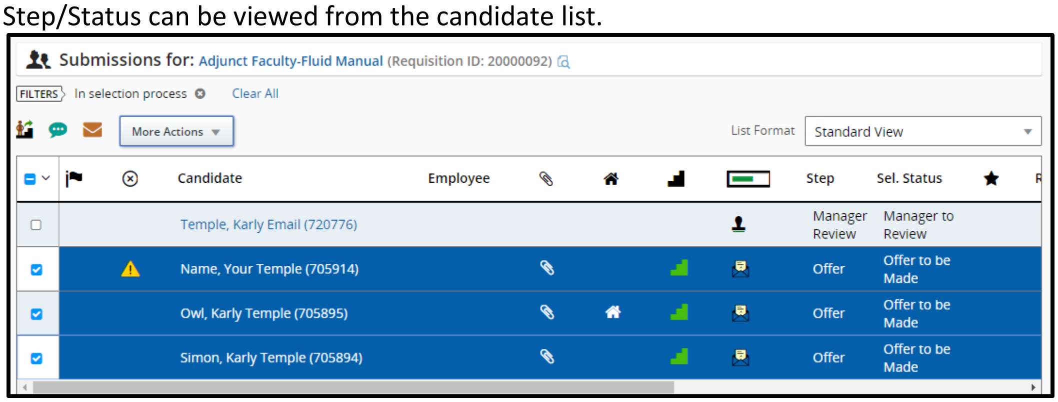


3. Click on the **More Actions** tab to bring up a list of options. Choose the **Change Step/Status** option to bring up a pop-up box. The box will show the current Step/Status and the next move in the process. Select **Apply and Close** to move the candidates.



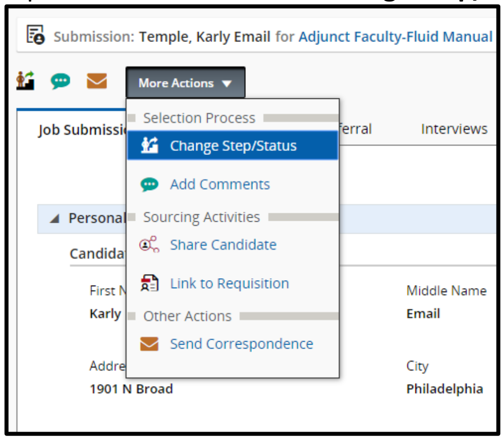


4. The candidates can be moved along the process as far as you wish to take them. You can continue to update the Step/Status up to the Offer stage. Once a candidate is in the Step/Status of **Offer: Offer to be Made**, you will need to stop to create the offer. The Department Recruiter will receive an email indicating that the candidate is ready to receive an offer. Their updated Step/Status can be viewed from the candidate list.

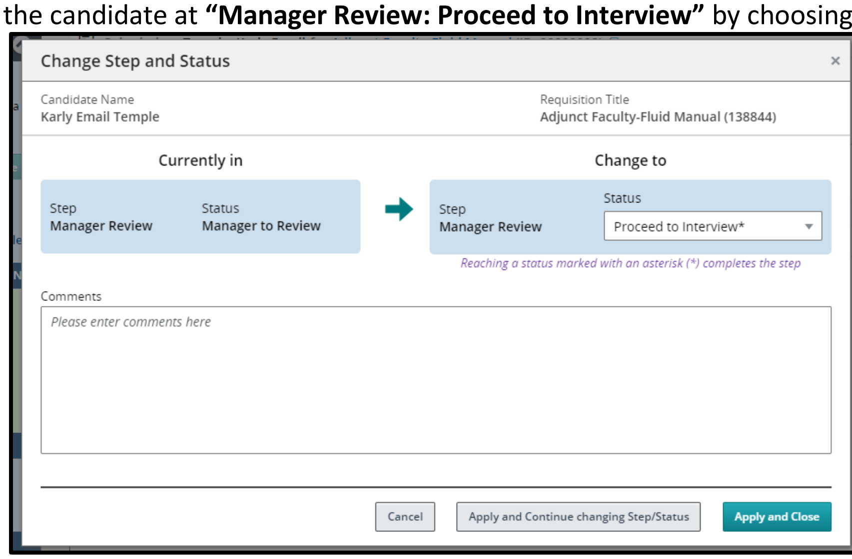


Moving Candidates One at a Time

1. Navigate to the candidate profile either from the **Requisition** or the **Submissions** tab on your dashboard.
2. While in a candidate profile, locate the **More Actions** tab at the top of the page. Click on the arrow in the tab for a drop-down list. Choose the **Change Step/Status** option.



3. A pop-up box will appear, giving options of steps to move the candidate through. The box will show the current Step/Status on the left and the next move in the process. You can review each applicant and change the status accordingly.
   a. If you wish to interview a candidate, you will need to stop changing the step/status of the candidate at **"Manager Review: Proceed to Interview"** by choosing **Save and Close**.



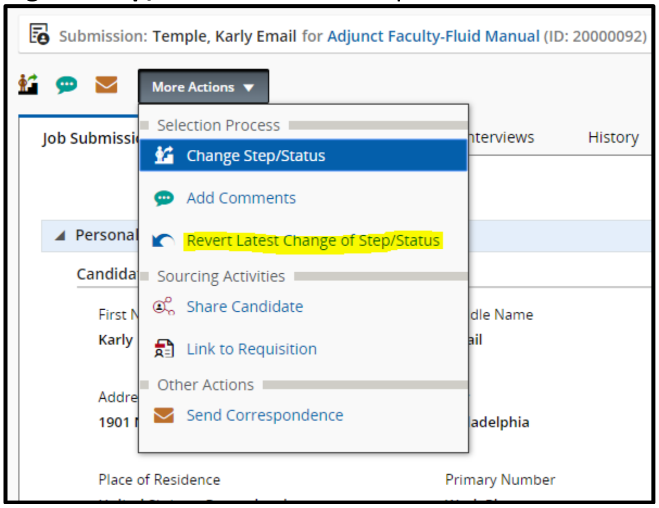
Taleo Tip: In the Change Step/Status box, you have two options:

A. **Apply and Continue changing Step/Status**: By choosing this option, the box will remain open and automatically bring the candidate into the next step or status. Only use this option if you are moving candidates through several steps/statuses at one time.

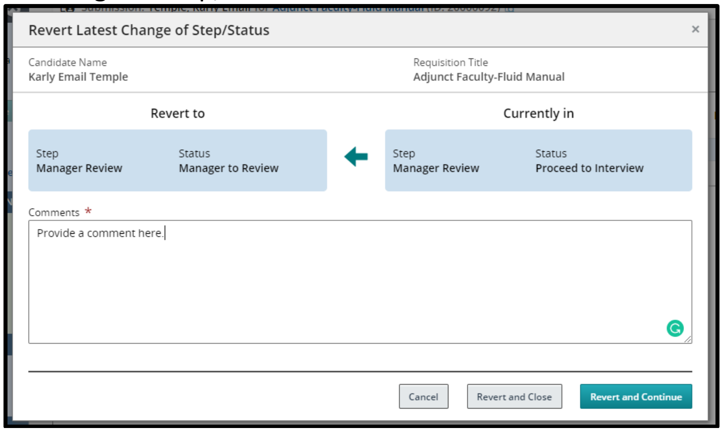
B. **Apply and Close**: By choosing this option, you are moving the candidate one Step/Status at a time. It will save your choice and close the window, bringing you back to the candidate list and showing the updated Step/Status.

4. Continue moving candidates through the Step/Status box to advance them through the process until the **Offer: Offer to be Made** step/status. Here, the Department Recruiter will need to go into the Offer grid to create an offer.

Taleo Tip: If you status an applicant by mistake, you can move back a step. From the **More Actions** tab, choose **Revert Latest Change of Step/Status** from the drop-down menu.

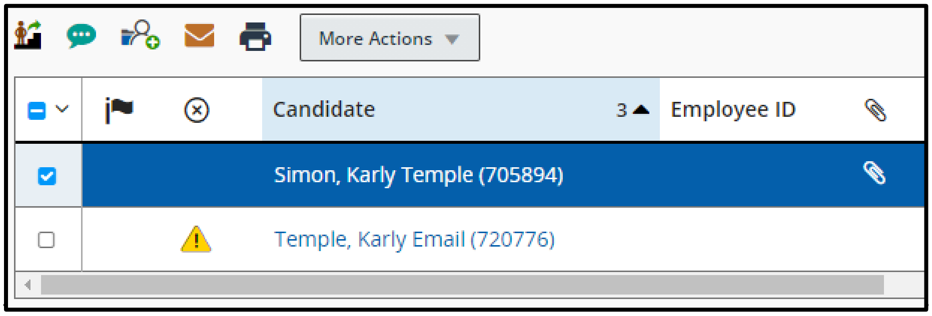


A pop-up box will appear to move the candidate back a step. Comments are required to be included when the **Revert** option is selected. Select **Revert and Close** to move one step/status back or **Revert and Continue** to continue reverting the Step/Status.

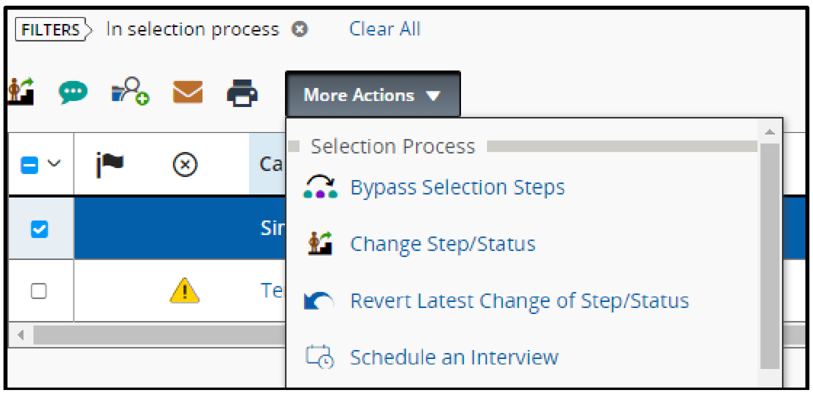


Creating an Interview

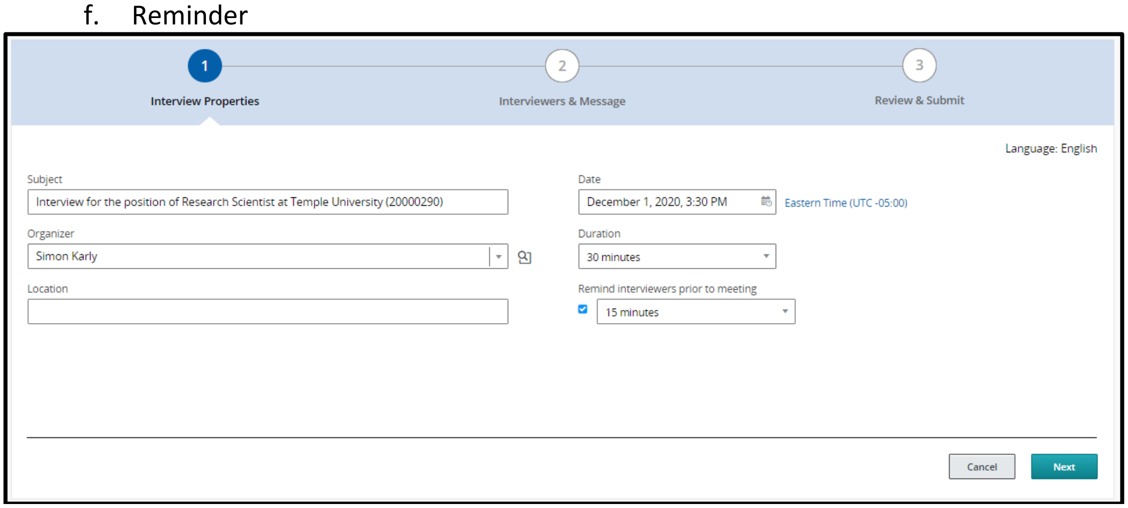
1. Ensure all candidates you wish to bring in for an interview have the Step/Status of **Interviews: Interview Scheduled**.
2. From the candidate list within the requisition, **check off** the candidate you wish to schedule an interview with.



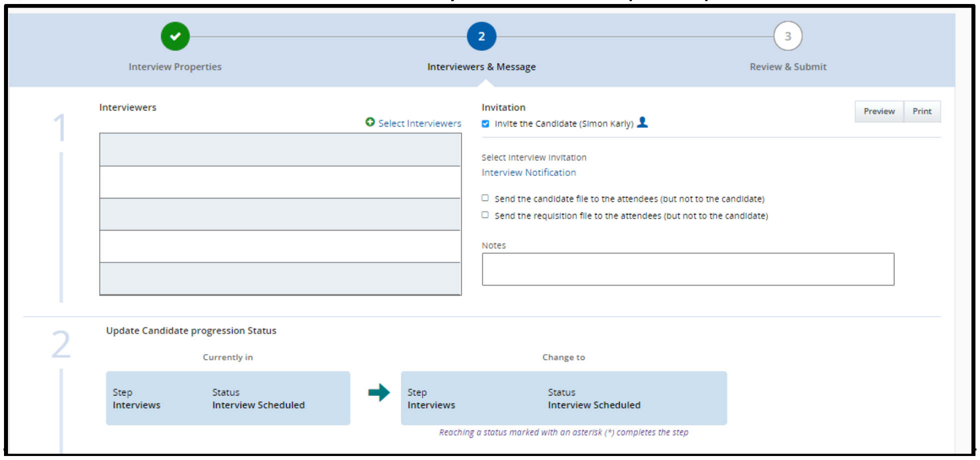
3. Go to **More Actions** and select **Schedule an Interview**.



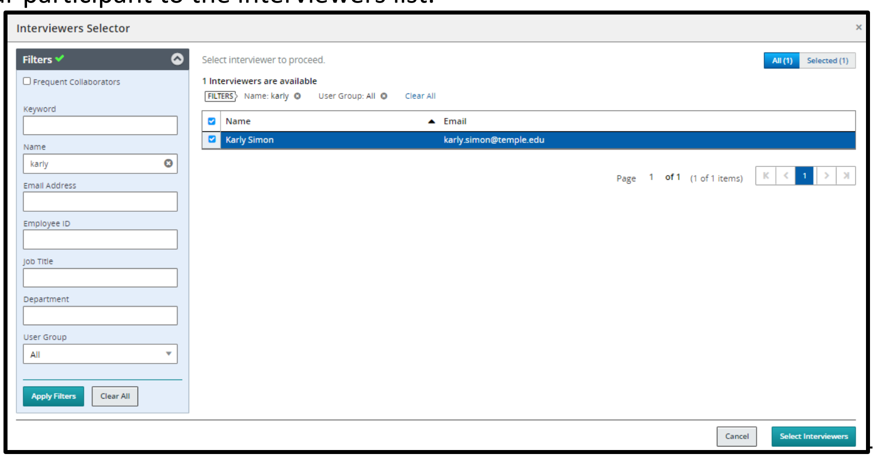
4. Fill in appropriate fields in the new window. Most of these will be auto-populated with information. You can make edits to any field. Select **Next** when done.
   a. Subject
   b. Organizer (this should be left as your name)
   c. Location
   d. Start and End date and times
   e. Default Time Zone (do not change, should reflect Eastern Time)
   f. Reminder



5. Next, choose **Select Interviewers** to add your interview participants.

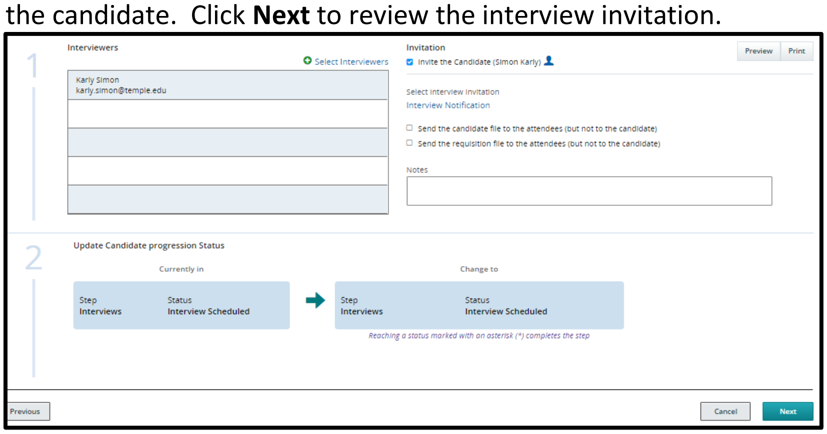


6. The **Filters** on the left-hand side of the window will allow you to jump directly to the name or email address of the person you are searching for. Select the checkbox on the left-hand side of the participant's name. Once your participant has been selected, click **Select Interviewers** to add your participant to the interviewers list.



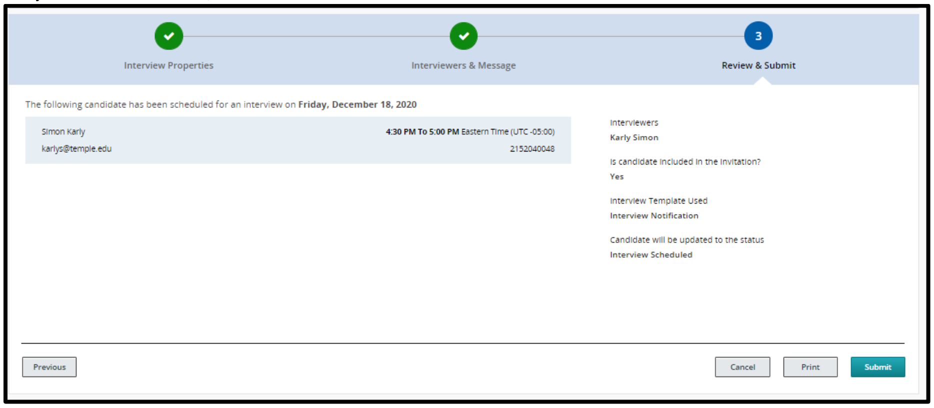
Taleo Tip: Your interviewer must have Taleo access to be added as a participant.

7. You are also able to send a link of the candidate file or the requisition file to attendees, excluding the candidate. Click **Next** to review the interview invitation.

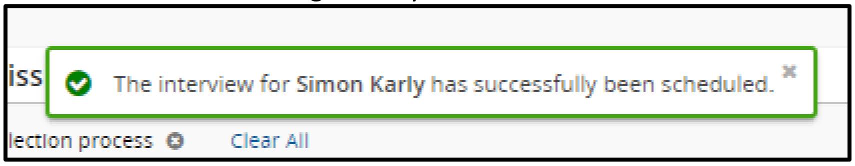


Taleo Tip: Check off the box for sending an invite to the candidate if you want them to receive an email with this information as well. Uncheck the box if you do not want the candidate to receive an email from Taleo.

8. Review your invitation, then select **Submit** to send the invitation.



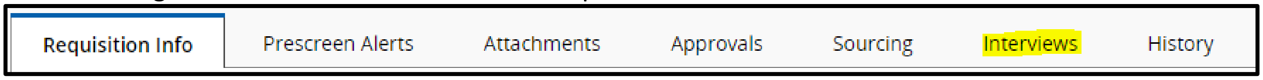
9. You will receive the success message once you select **Submit**.



10. Once the interviews are completed, interview evaluation forms should be completed.

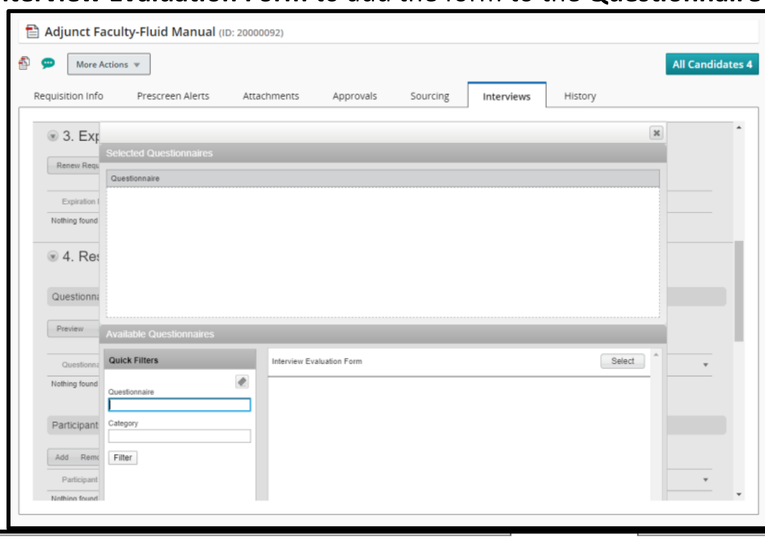
Creating an Interview Evaluation

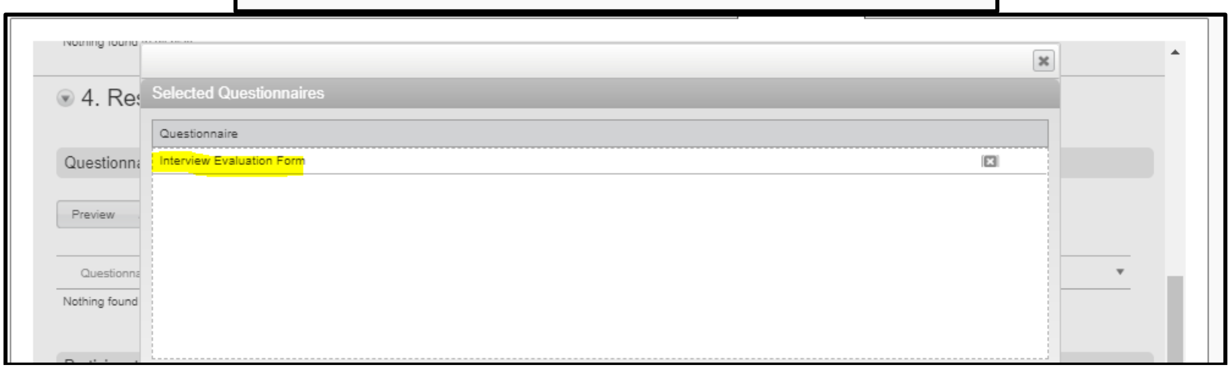
1. Navigate to the **Interviews** tab of the requisition.



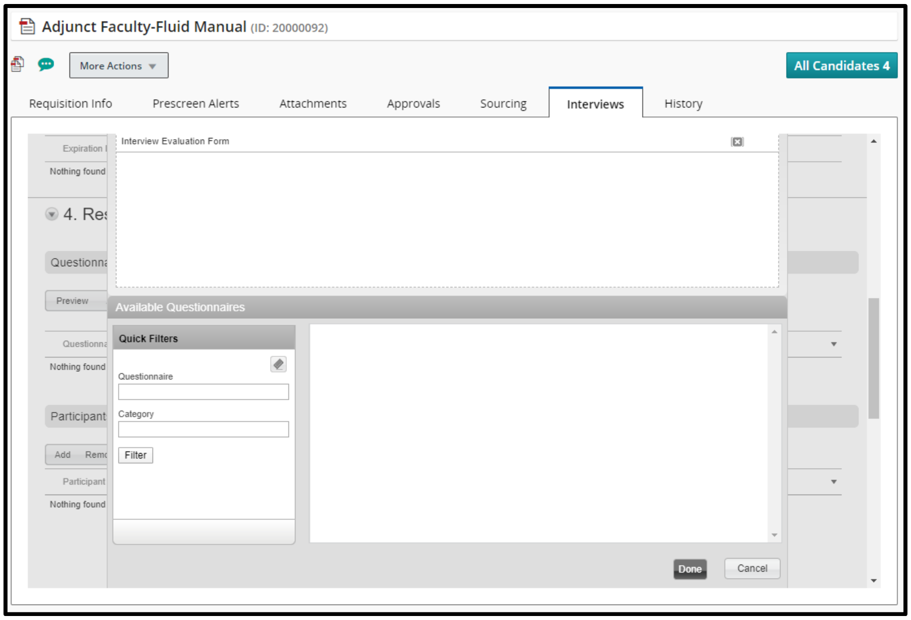
2. Under section **4. Resources** select **Add** below **Questionnaires Attached to Requisition**.

3. Select the **Interview Evaluation Form** to add the form to the **Questionnaire** section.

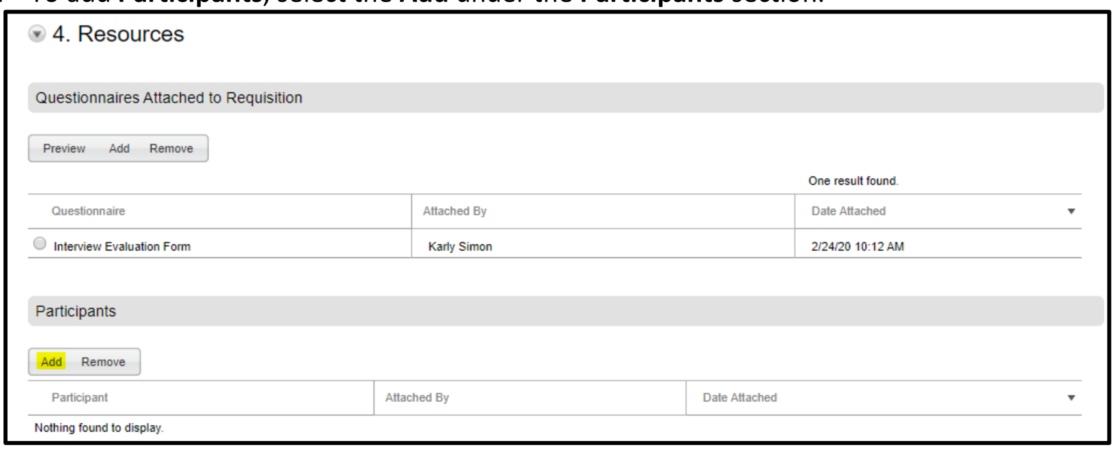




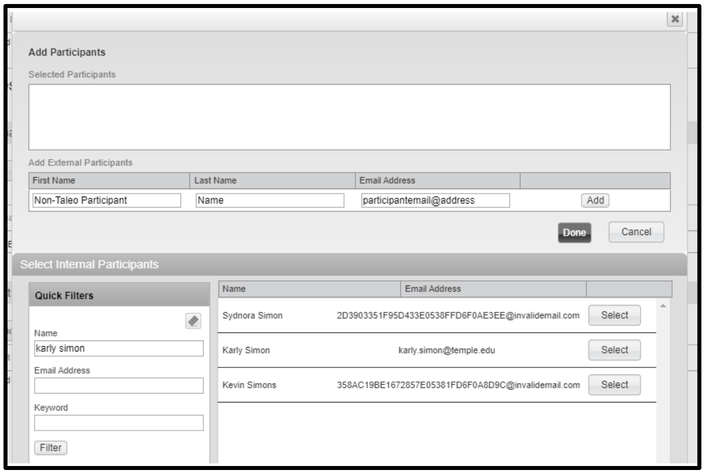
4. Scroll to the bottom of the window to select **Done.**



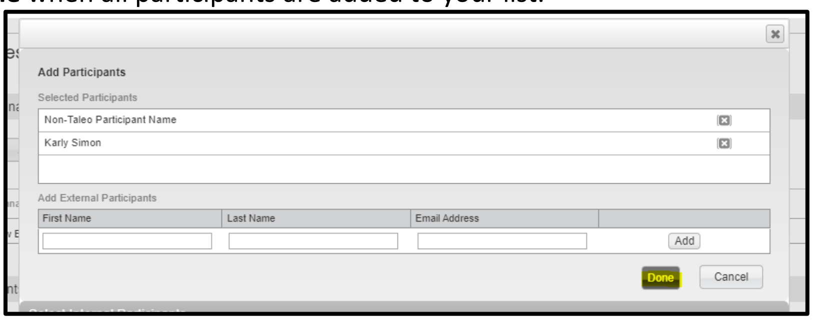
5. To add **Participants**, select the **Add** under the **Participants** section.



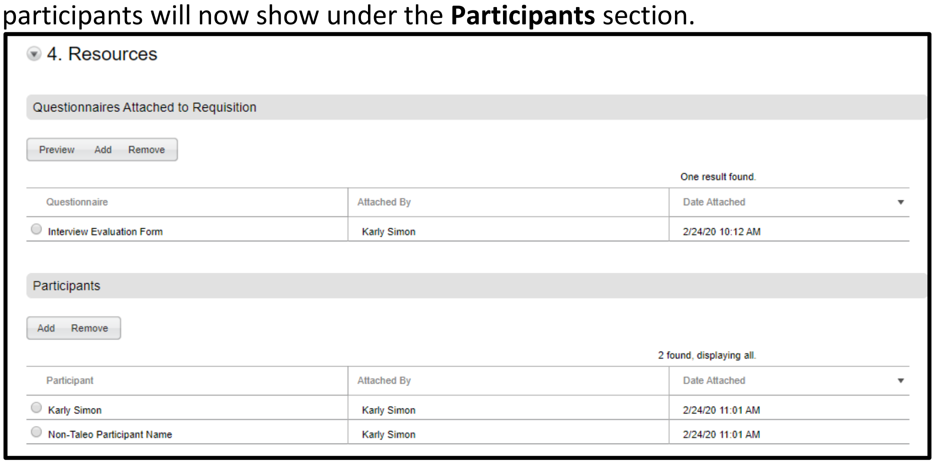
6. Participants to receive an Interview Evaluation form can be added from this window. The upper section can be used to add people who are not users of Taleo. The lower section can be used to add participants who have access to Taleo.
    a. For the upper section, manually type in the first and last name and the email address of your participant. Select **Add** when names are entered.
    b. For the lower section, use the Quick Filters function to jump to the name or email address of your participant. Click **Select** to add a participant to the list.



7. Select **Done** when all participants are added to your list.

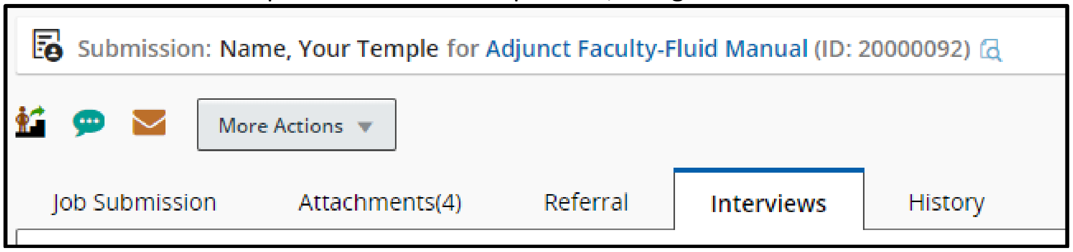


8. Your participants will now show under the **Participants** section.



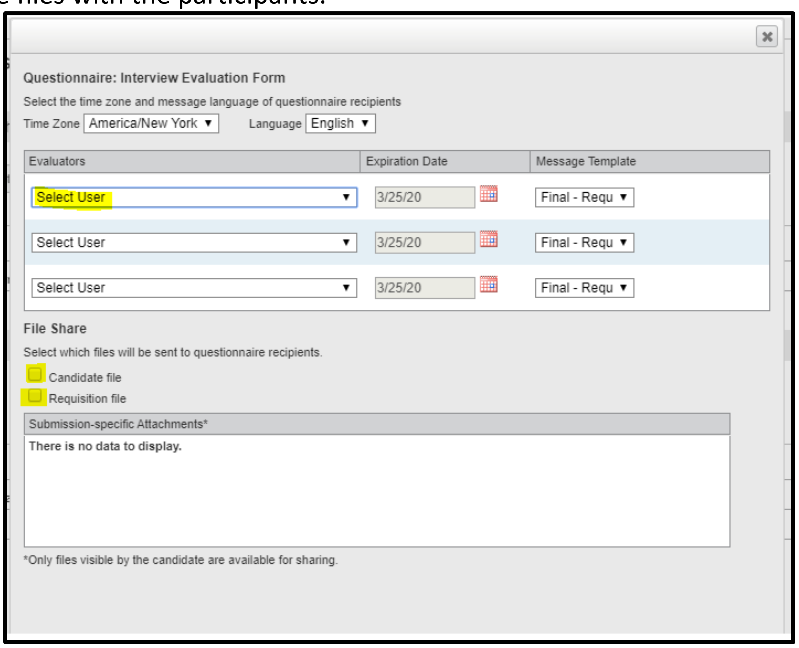
Sending out and Reviewing Interview Evaluations

1. From the candidate's profile within the requisition, navigate to the **Interviews** tab.

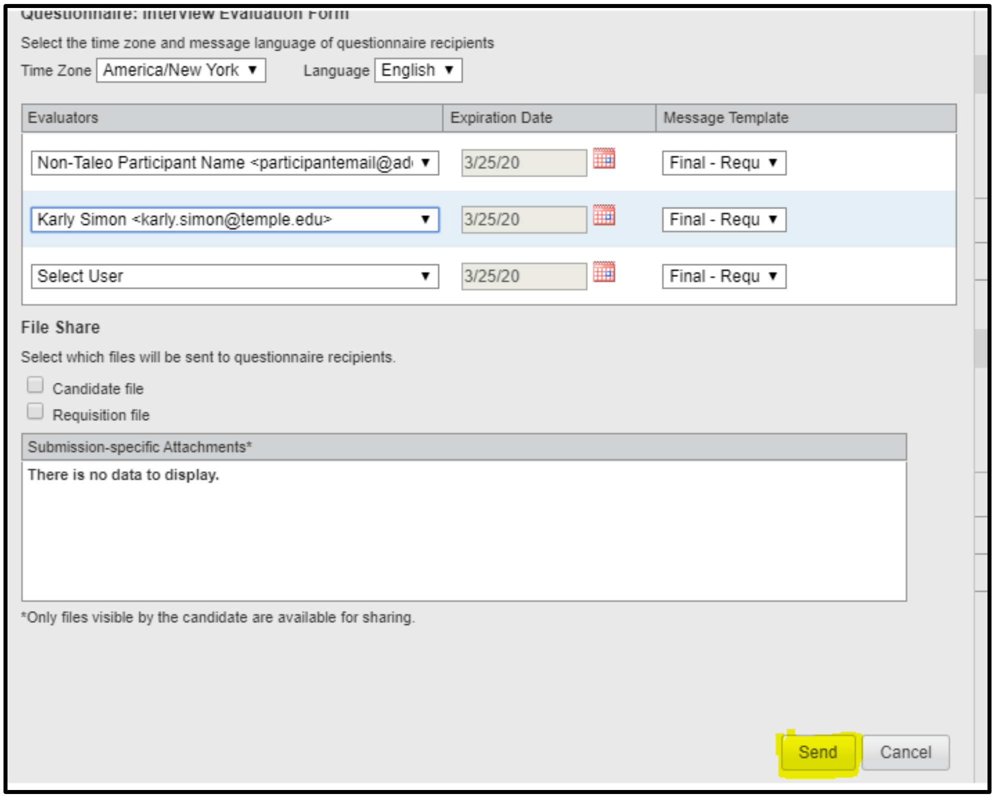


2. Scroll to section **4. Resources** to see **Questionnaires Attached to Requisition**. Select the radio button next to the **Interview Evaluation Form** and select on **Send Request**.

3. In the new window, select the dropdown **Select User** to choose participants to send the evaluation to. You may also check off **Candidate file** and **Requisition file** below if you wish to share these files with the participants.

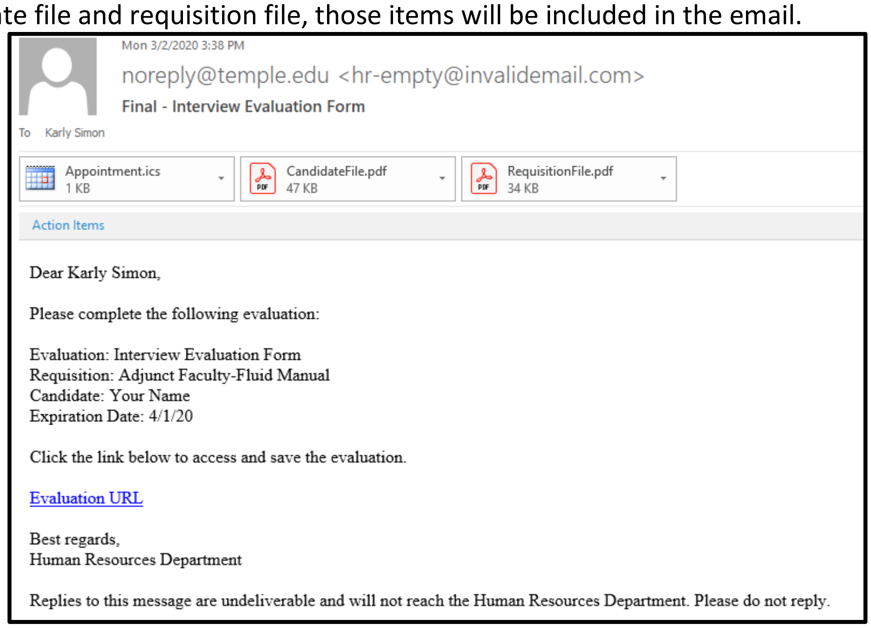


4. Select **Send** when done. An email will be sent to all participants with a link to the interview URL. All participants can complete the evaluation and submit it to Taleo.

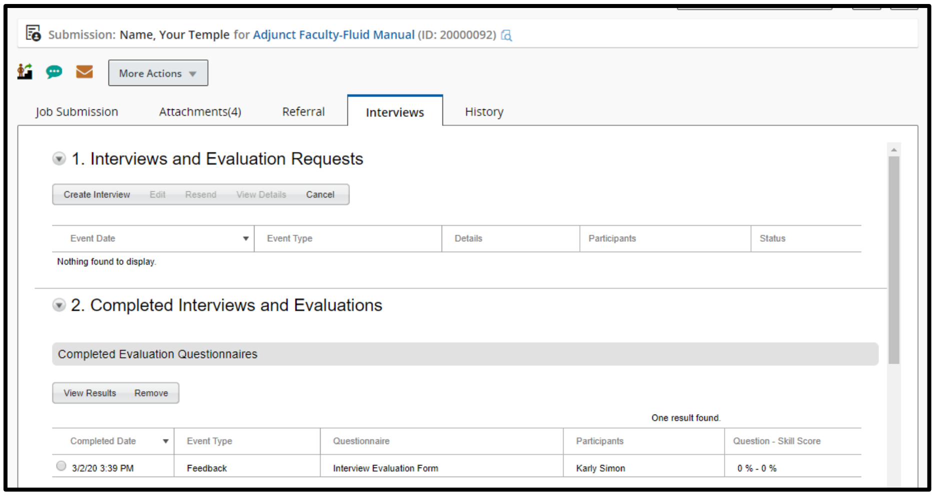


Taleo Tip: Include the candidate file so the evaluator is aware of who they are evaluating.

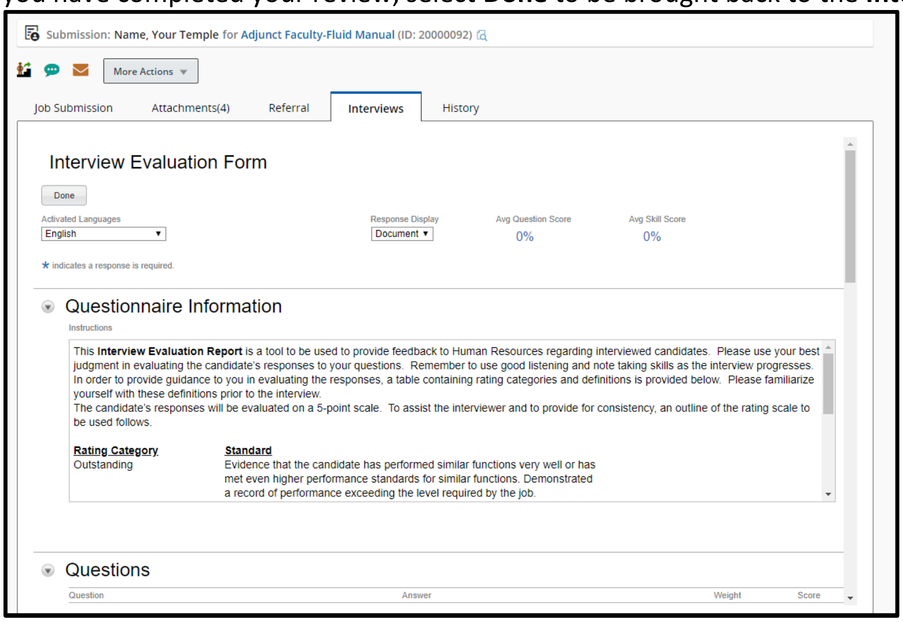
5. Participants will receive an email with a link to complete the evaluation. If you attached the candidate file and requisition file, those items will be included in the email.



6. To view completed evaluations, navigate to your candidate's profile within the requisition. Select the **Interviews** tab and scroll to section **2. Completed Interviews and Evaluations**. You will see a list of all completed evaluations. Select the radio button of the evaluation you wish to review and select **View Results**.



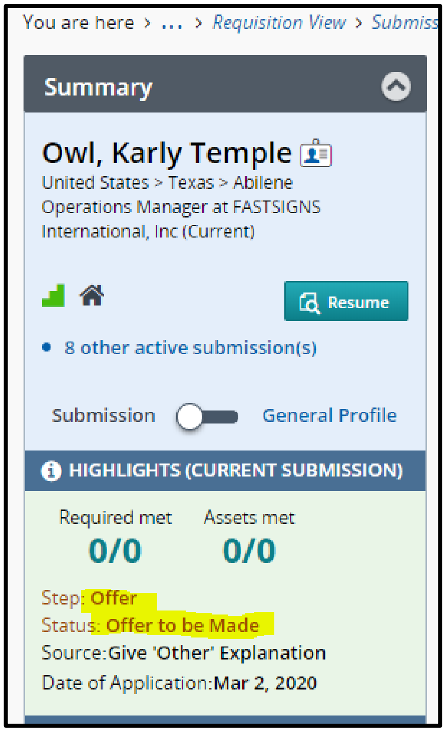
7. When you have completed your review, select **Done** to be brought back to the **Interviews** tab.



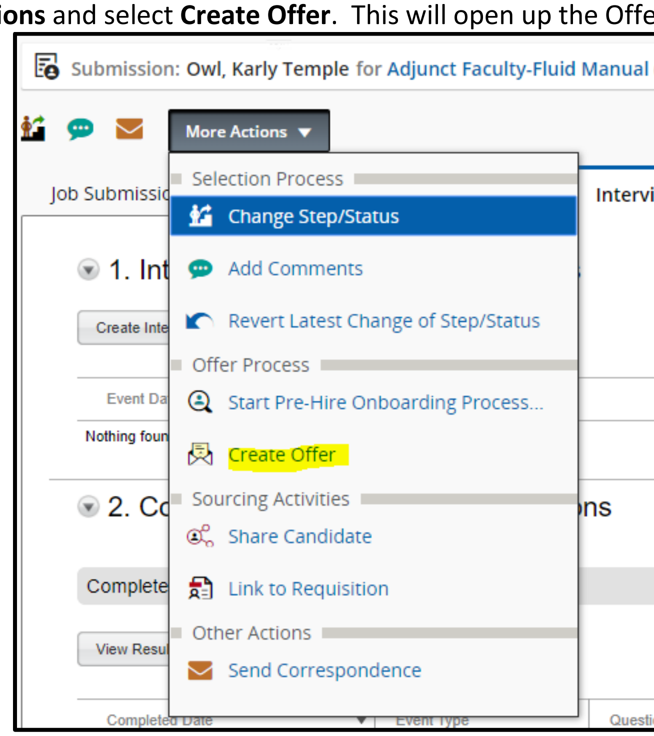
Creating and Extending an Offer – Adjunct

1. Navigate to your requisition, select the blue number to open your candidate list, and select your candidate. You must be in the candidate's profile to create the offer. Ensure the candidate is in the **Step/Status** of **Offer/Offer to be Made**.

Taleo Tip: From your candidate list, select the name itself, not the checkbox, to access the submission.



2. Go to **More Actions** and select **Create Offer**. This will open up the Offer grid.

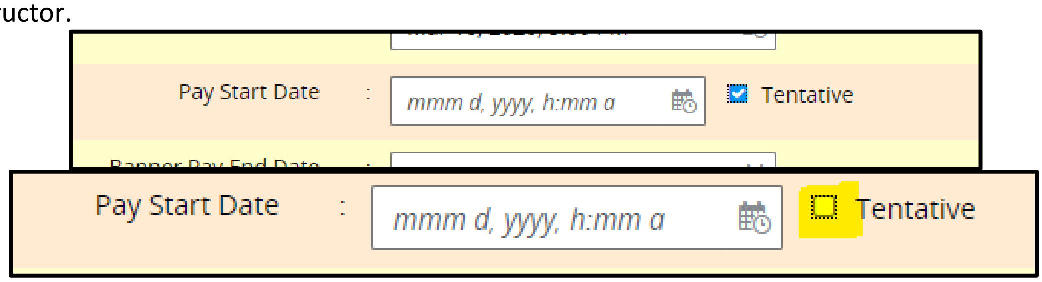


Offer Grid

Top Section

1. Enter the following information which will appear on the E-offer appointment letter
    a. **Pay Start Date**: the pay start date for an Adjunct should always be the first day of the first month they are paid
        i. Example: September 1st for the Fall semester; January 1st for the Spring semester
    b. **Pay End Date**: the pay end date for an Adjunct should always be the last day of the last month they are paid
        i. Example: December 31st for the Fall semester; May 31st for the Spring semester
    c. **Teaching Begin Date**: The first day the Adjunct begins work for that semester
    d. **Teaching End Date**: The last day the Adjunct finishes work for that semester
    e. **Offer Expiration Date**: Date by which you want them to respond to the offer, the field will autofill. For adjuncts, the guideline is ten days from when the offer is extended.
    f. **Letter Number of Pays**: number of paychecks the adjunct will be receiving.

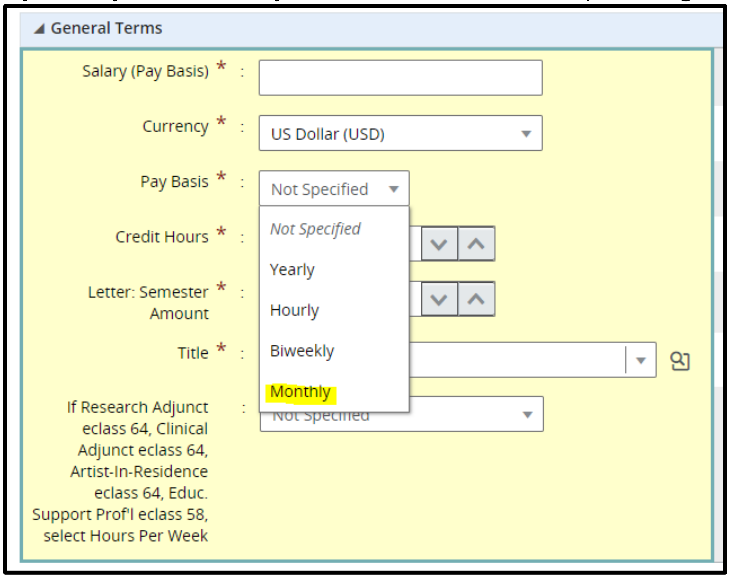
Taleo Tip: you may enter a date or click on the calendar function for all date fields.
Taleo Tip: By default, the box labeled **Tentative** is checked. This means that the job start date is tentative. For Adjuncts, **uncheck this box.** If left checked you will need to update the start date to hire the instructor.



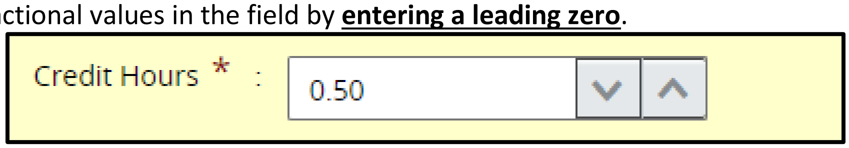
General Terms

For assistance with the offer grid, refer to the Guide for Hiring Adjuncts and Part-Time Instructors tool from the [Taleo References and Manuals Page](#).

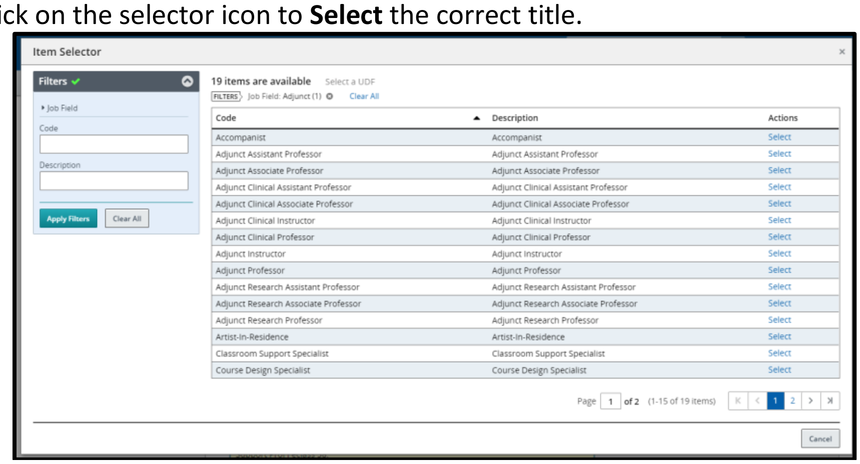
1. The next section relates to pay and title. Enter the **salary** rate of pay and **pay basis**. Always choose **Monthly** for Adjuncts and Adjunct Artists in Residence (teaching Credit Courses).



2. Below that field are additional fields: **Credit Hours**, **Title,** and **Hours Per Week**.
3. **Credit hours**: Only completed for regular **Adjuncts** with a PCN beginning with "A". Type the total number of credits the adjunct will be teaching during this contract. If needed you can enter fractional values in the field by **entering a leading zero**.



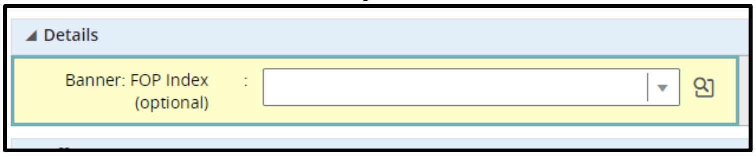
4. Next, click on the selector icon to **Select** the correct title.



5. **Hours Per Week**: Only completed for **Adjunct Artist in Residence**, **Clinical Adjuncts**, and **Research Adjuncts**. Choose the hours per week the individual is working from the drop-down menu.

Taleo Tip: You can always refer to the Guide for Hiring Adjuncts and Part-Time Instructors from the [Taleo References and Manuals Page](#).

6. If needed, the FOP index is available. This is to be used if you do not want the default FOP from Banner Position Control to default into the job.



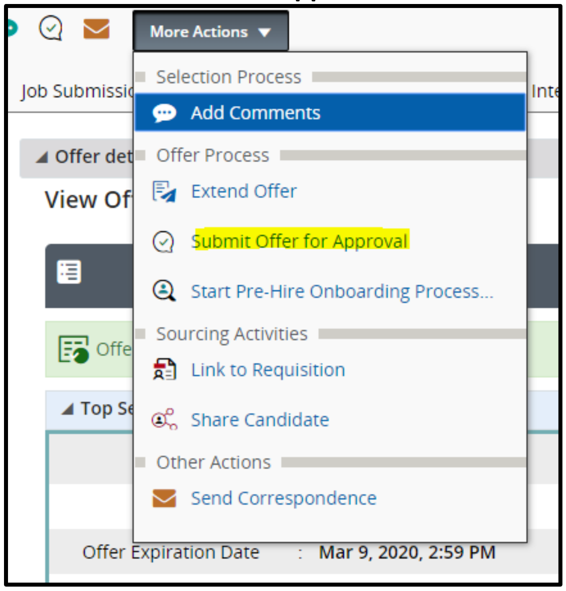
Taleo Tip: If you need to look up the **FOP Index**, please sign in to TUPortal and go to the Banner tab, Finance Channel.

- Operating Funds (100000): the corresponding ***org*** is equal to the index
- Non-operating Funds (all except 100000): the ***fund number*** is equal to the index

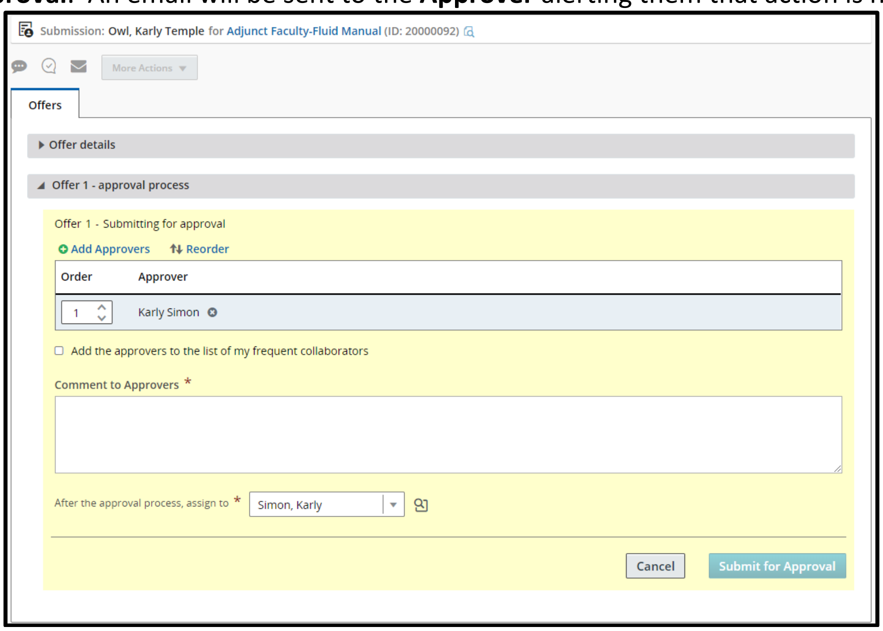
7. Select **Save and Close** when you are done. If you are missing any fields, an error message will appear. After you save the offer, an edit button will appear so that you may make revisions if necessary.
8. If needed, you can route the offer for Approval to others in the department or in some cases to Faculty Affairs. Recruiters with proper authority may extend the offer without needing additional approval.

Route for Approval

1. From **More Actions** select **Submit Offer for Approval**.

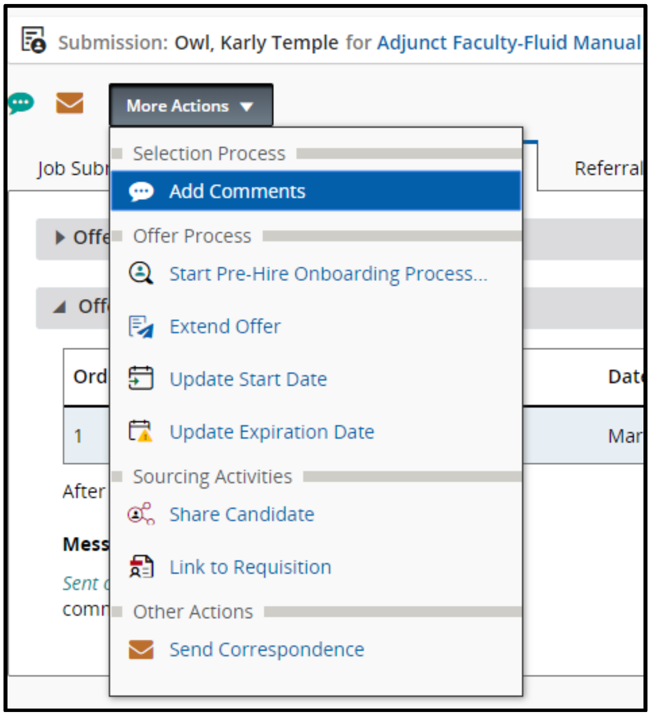


2. To add approvers, select **Add Approvers**. You can search for approvers in the new window to add to your list.
3. When you are ready to request approval, add a comment in the comment box and click **Submit for Approval**. An email will be sent to the **Approver** alerting them that action is needed.

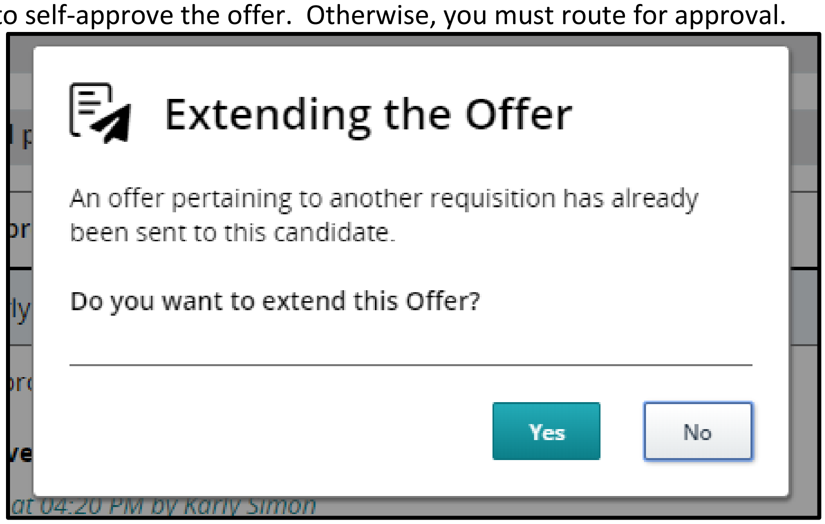


Extend the Offer

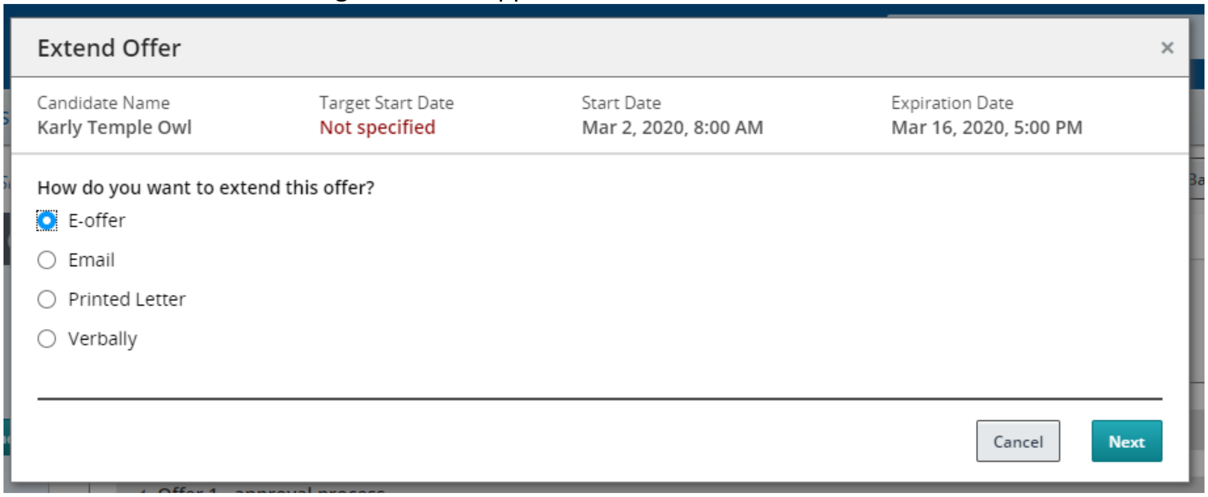
1. Navigate to the candidate's name in your requisition to open their profile.
2. Go to **More Actions** and select **Extend Offer**.



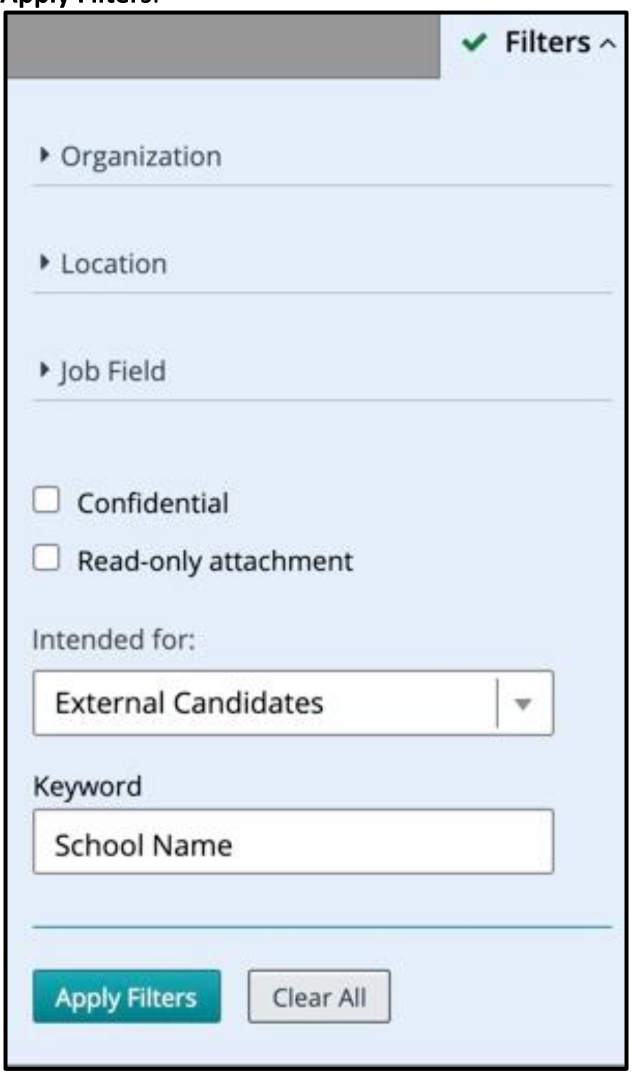
3. Recruiters will see the following pop-up warning box. If you have the proper authority, you may click **Yes** to self-approve the offer. Otherwise, you must route for approval.



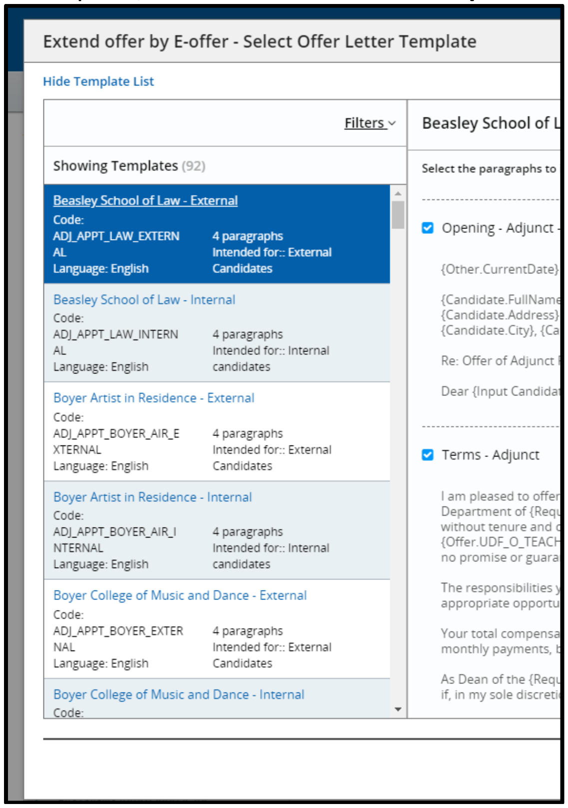
4. An **Extend Offer** dialogue box will appear. Select **E-Offer** and select **Next**.



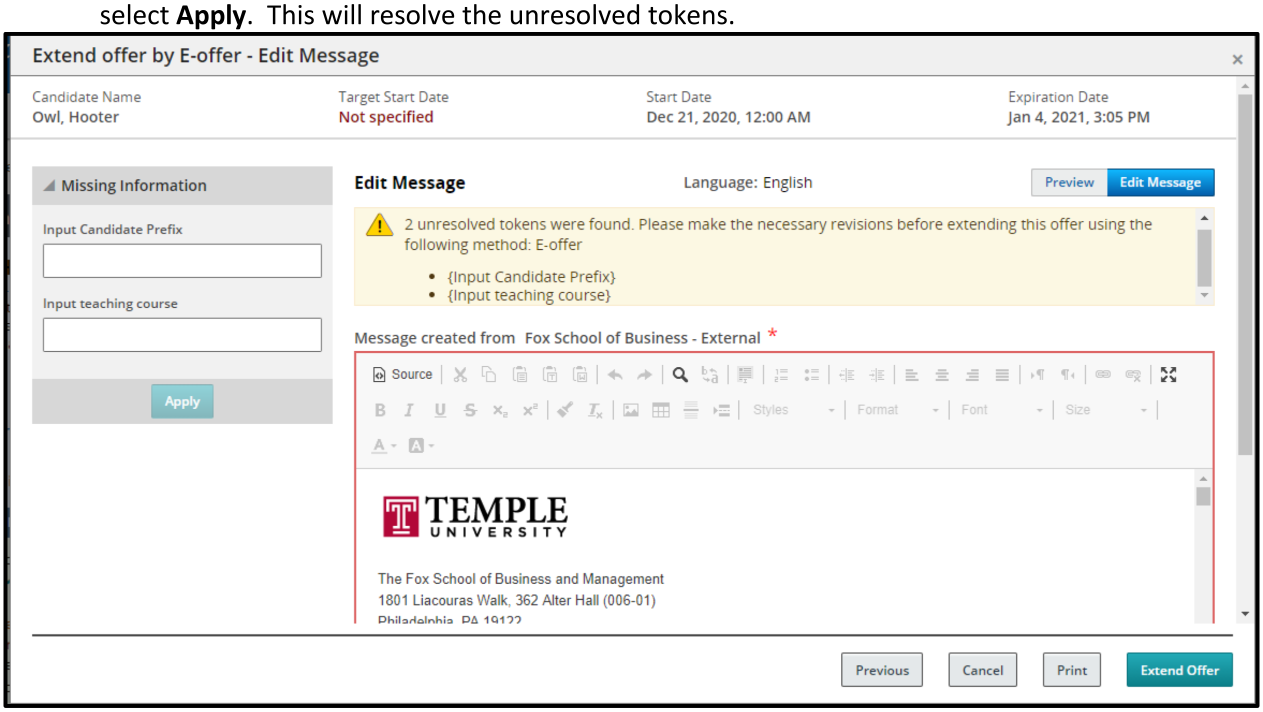
5. To select the correct template, open **Filters**. From the "**Intended for**" dropdown, select **External** versus **Internal** candidate as appropriate. In the **Keyword** section, type your school/college name then select **Apply Filters**.



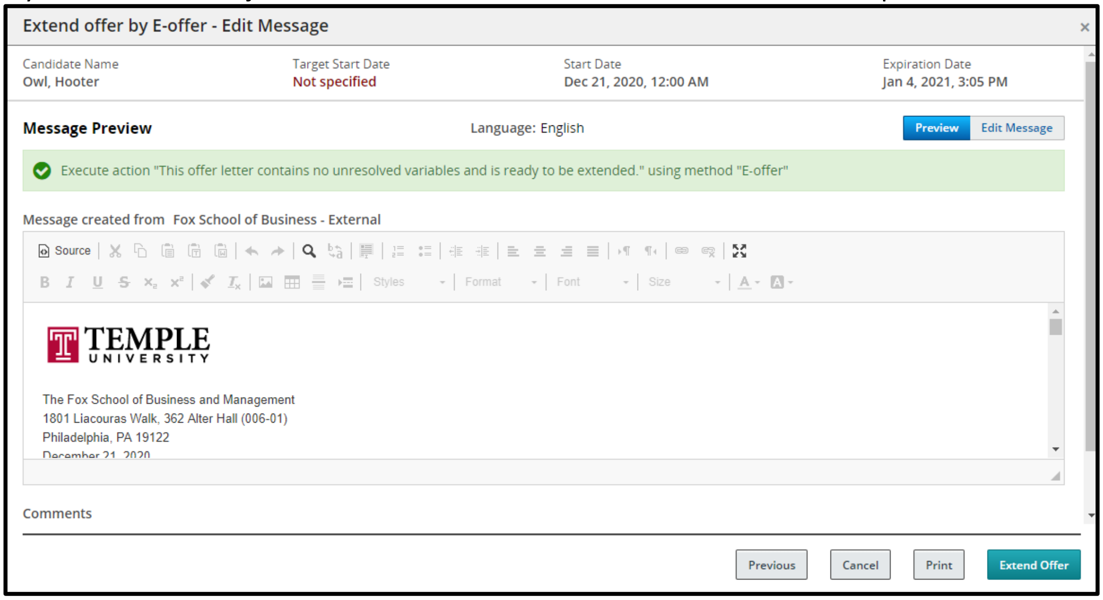
6. Select the appropriate template, then select the **Select Template** button to continue.



7. Input a Prefix and the information regarding the course including the name of the course. Then select **Apply**. This will resolve the unresolved tokens.



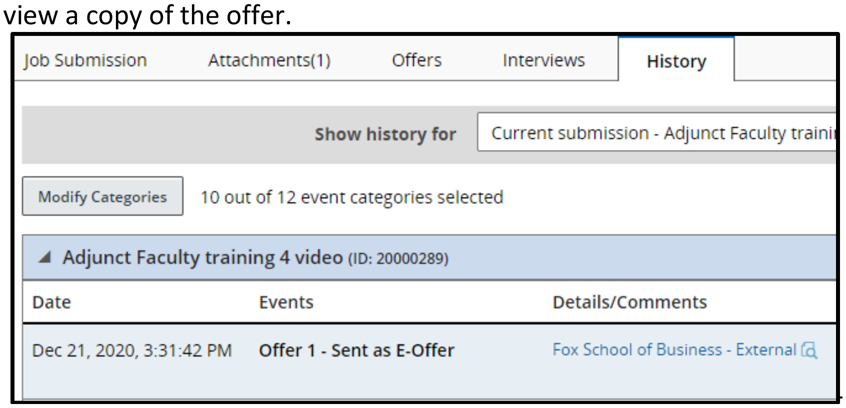
8. Review the contents of the contract then select **Extend Offer** when you are ready to extend your offer. The Adjunct will receive an email with a link to Taleo to accept the offer.



Taleo Tip: If the Internal Offer Letter template is selected, their TUID will appear on the E-offer appointment letter instead of their home address.

9. The Adjunct's step/status will update to **Offer: Extended**.

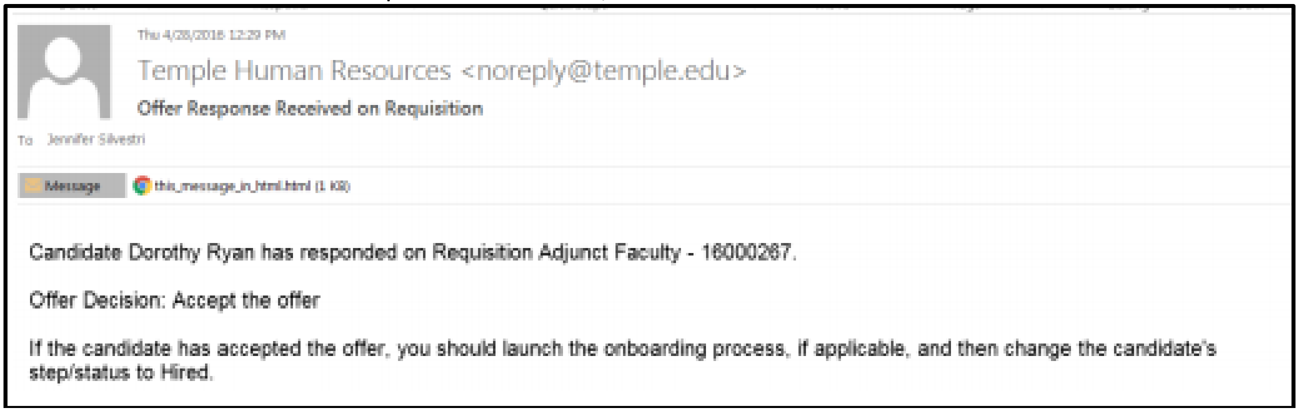
10. To access a copy of the Adjunct's offer letter, select the **History** tab in the candidate's submission. You will see the title of the letter in the **History** tab. You can click on the title of the letter to view a copy of the offer.



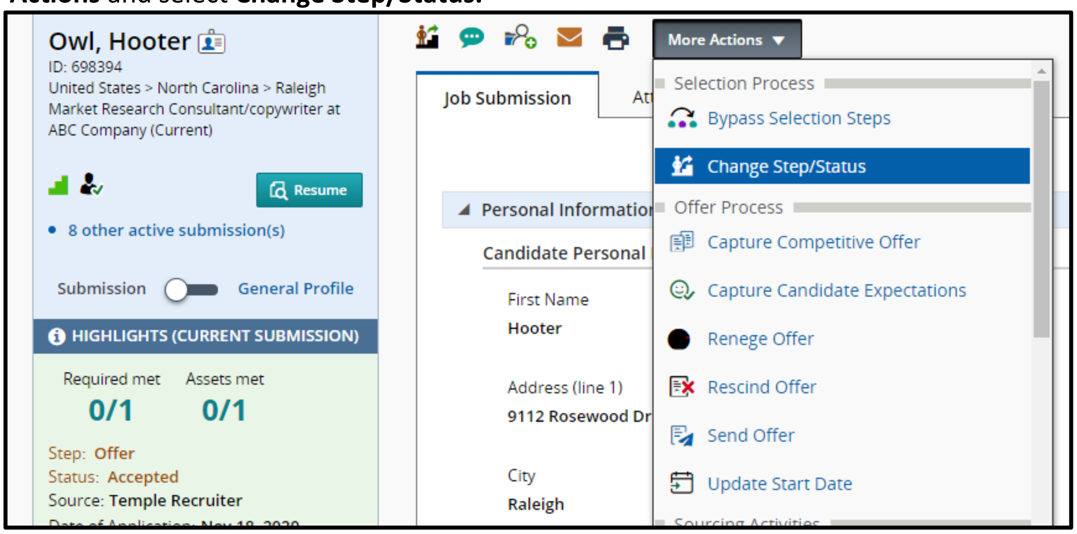
Hiring – Adjunct

During Hire/Hired Change

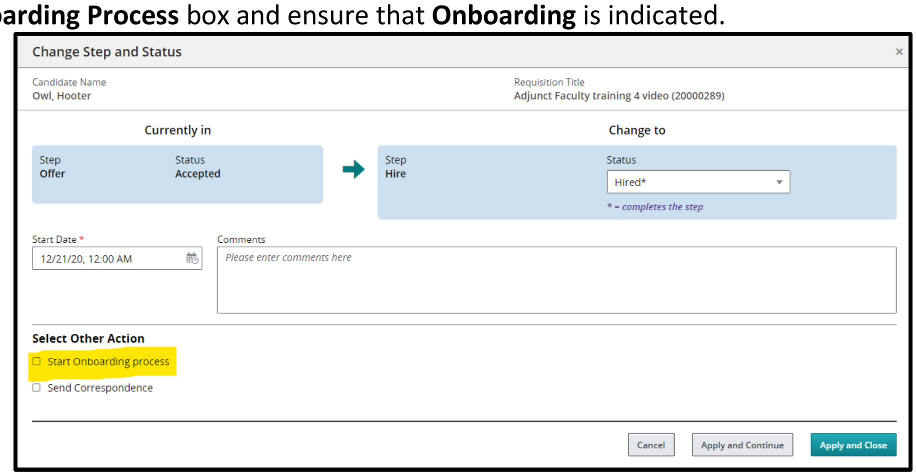
1. When the candidate responds to the offer, the Recruiter will receive a notification via e-mail.



2. If the offer is accepted, then the Recruiter needs to log into Taleo to hire the candidate.
3. Navigate to the Candidate's submission. Select the **Change Step/Status** icon or from **More Actions** and select **Change Step/Status.**



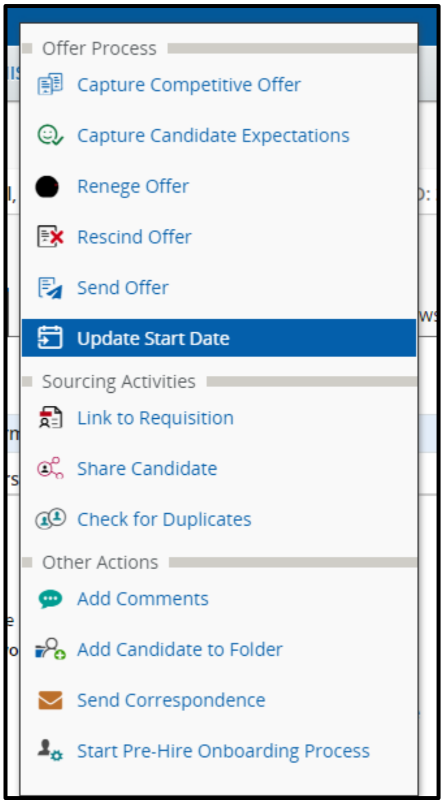
4. When in the Step/Status box, find the option titled **Select Other Options**. Check off the **Start Onboarding Process** box and ensure that **Onboarding** is indicated.



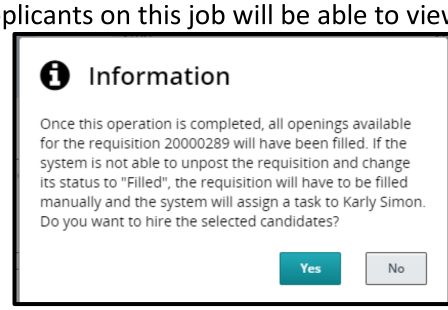
5. Select **Apply and Close**.

6. The status will update to **Hired** which will then update Banner.

Taleo Tip: If you are not receiving the option of **Change Step/Status**, you may still have the **Tentative** box from the offer grid marked. To change this, go to **Update Start Date**. Uncheck **Tentative** in the pop-up box and click **Update and Close**.



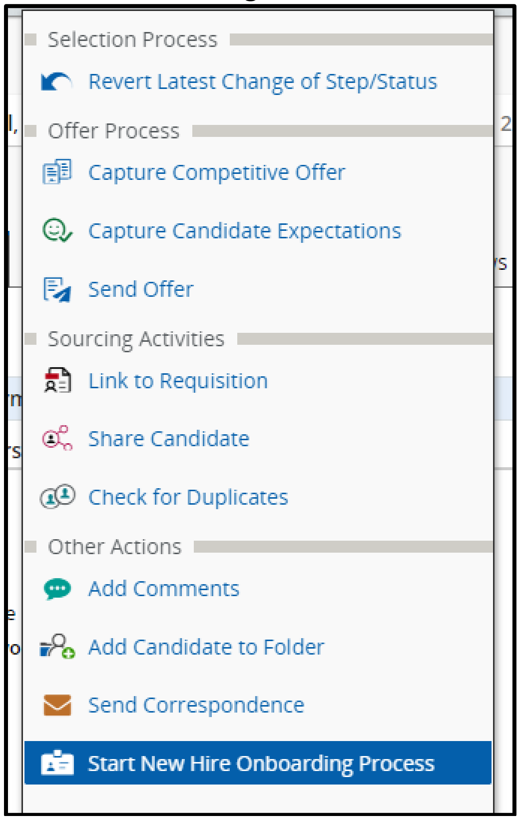
7. If the hire is the last opening on the requisition, a warning will appear notifying you that the hire action will fill the requisition. Filling the requisition will automatically remove the opening from the Career site and all applicants on this job will be able to view that the position is filled.



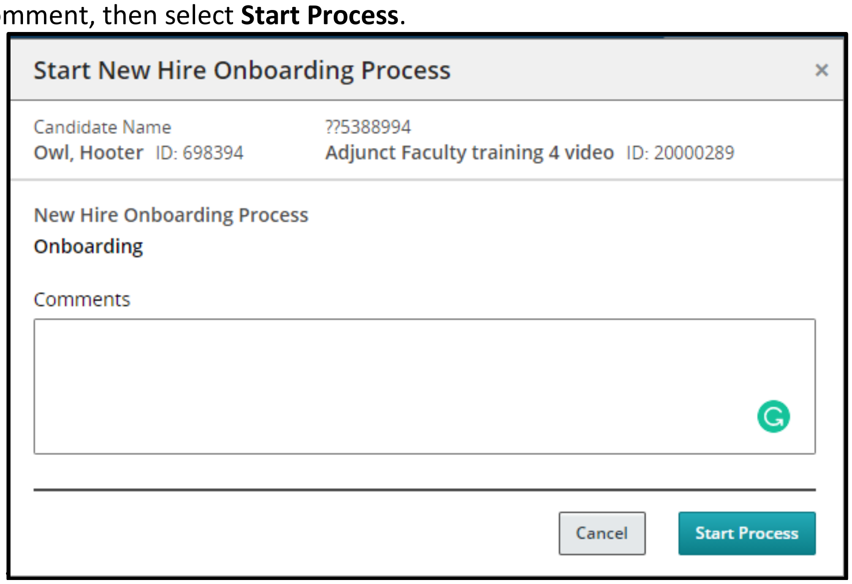
8. Once a requisition is filled, either through the final hire or manually from **More Actions**, all remaining candidates in the **Manager Review** or **Interview** steps will be rejected.

Not completed during Hire/Hired Change

1. If the candidate's step/status was changed to hire/hired without the onboarding process initiated, you can still start the onboarding process. From the candidate's submission select **More Actions**, then select **Start Onboarding New Hire Process**.

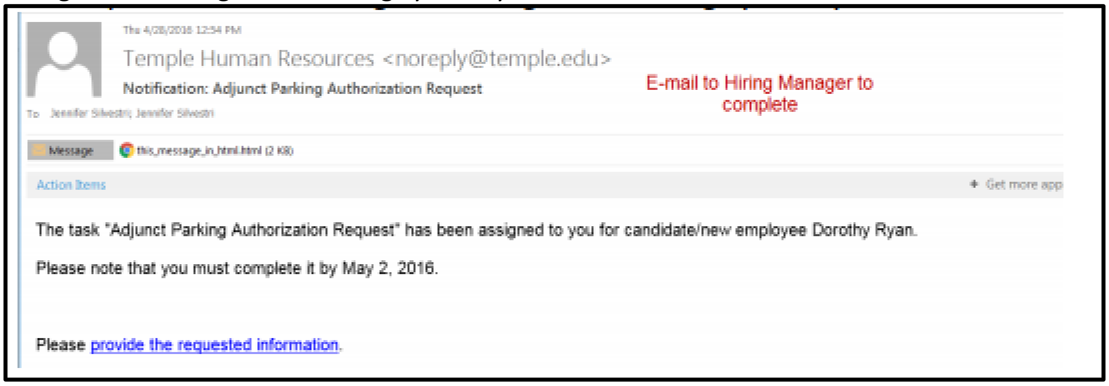


2. Add a comment, then select **Start Process**.

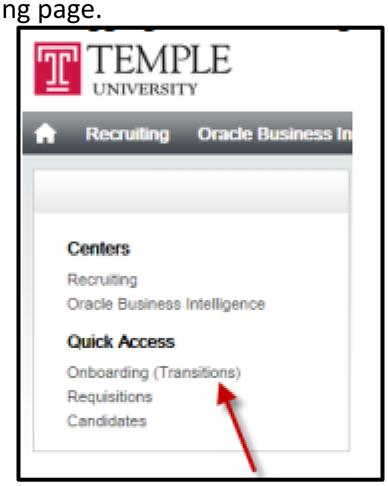


Approving Adjunct Parking

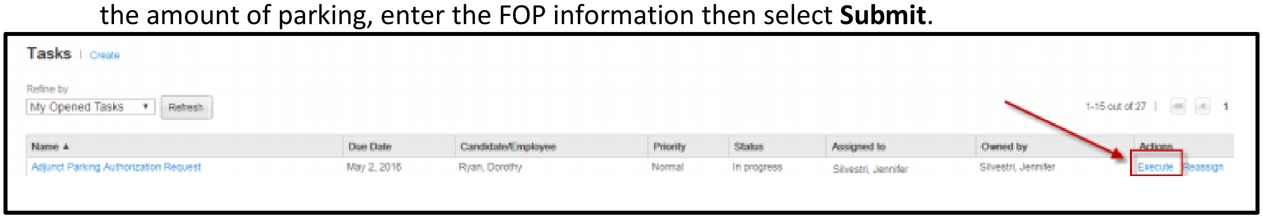
1. After the Adjunct completes the onboarding process which was initiated during the step/status change, the Hiring Manager will receive an e-mail that the Parking Authorization process has begun. Selecting the link brings you to your **Tasks**.

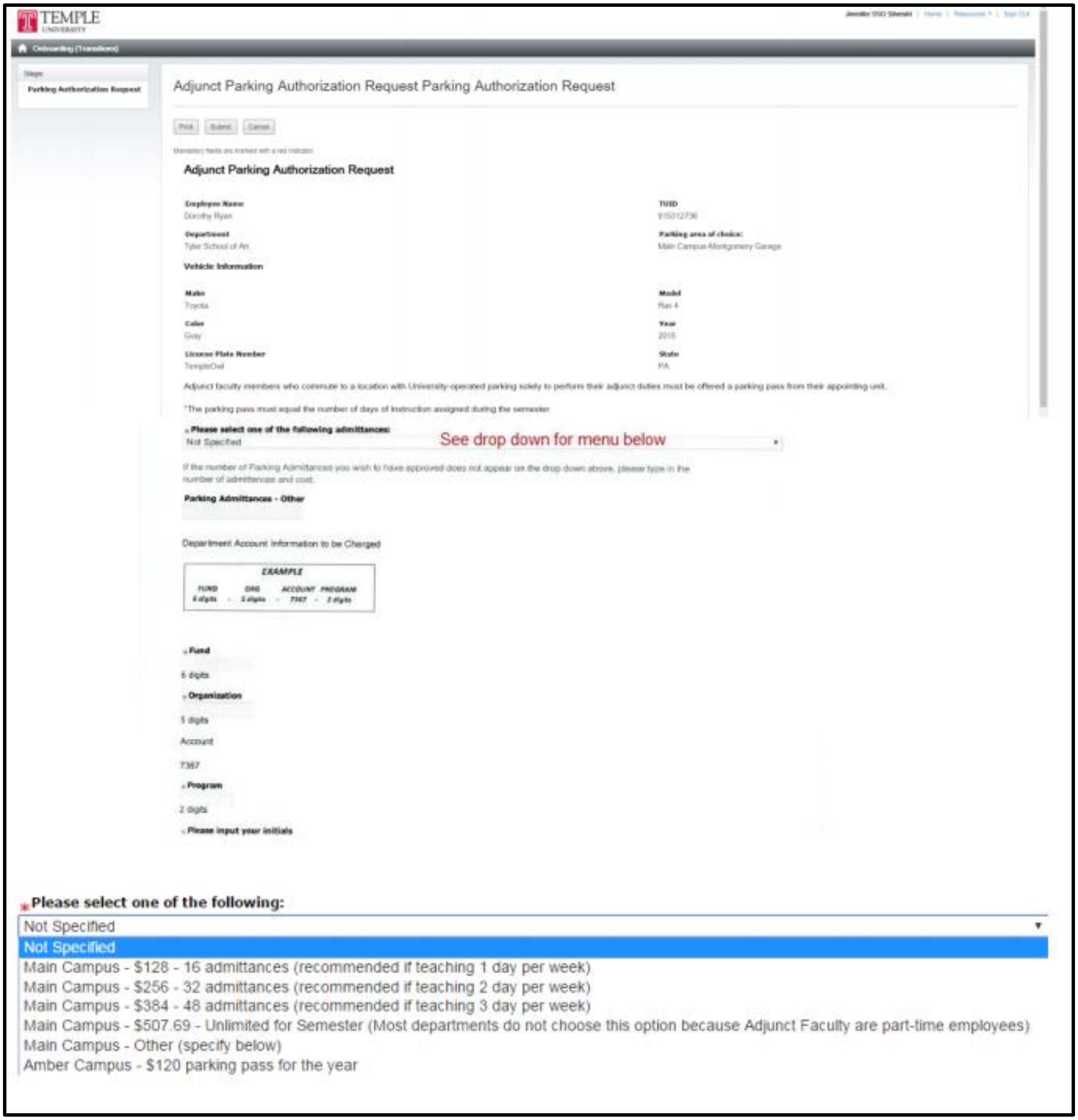


2. You can also access your list of tasks from Taleo. Sign in to Taleo and select **Onboarding (Transitions)** from the landing page.

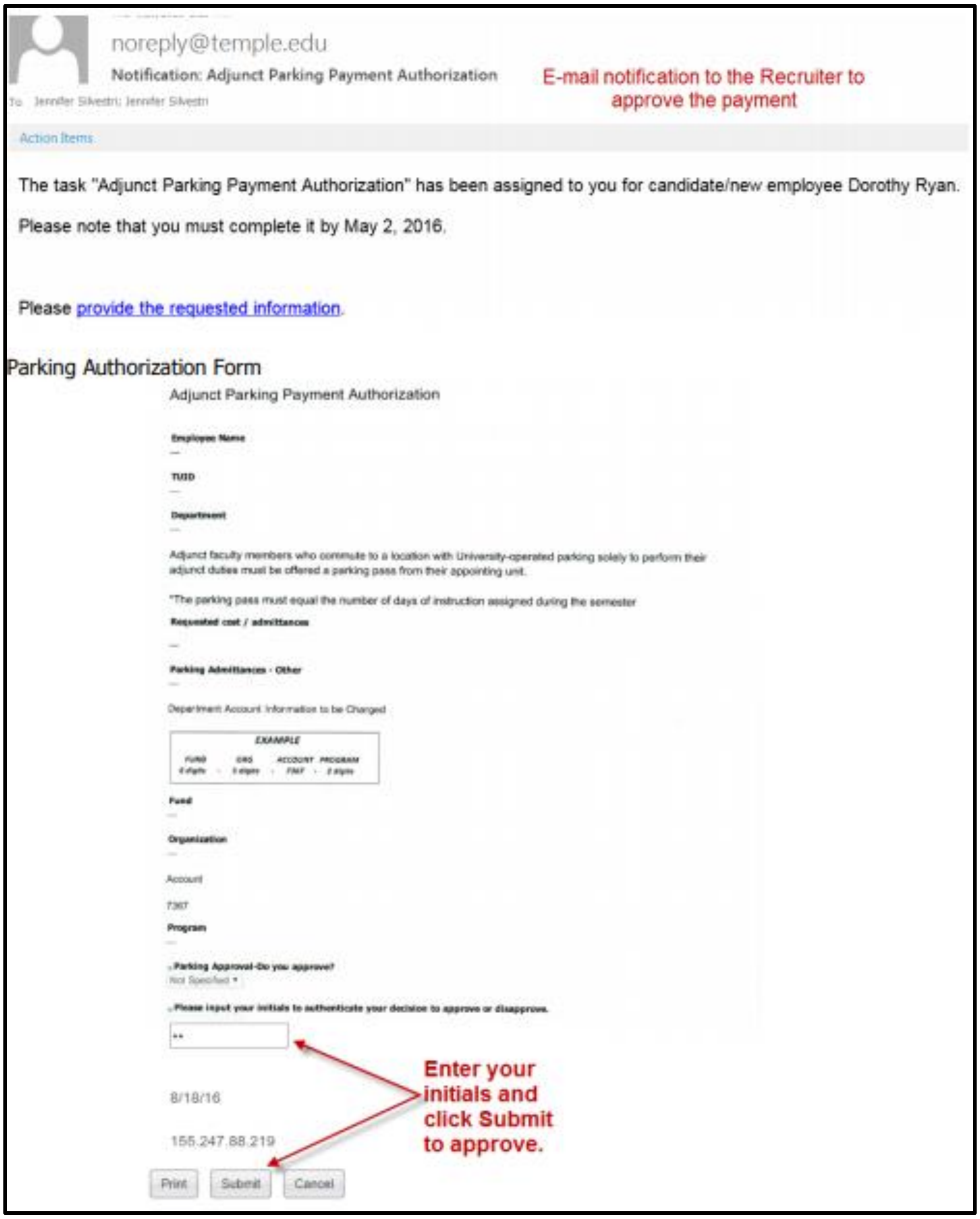


3. The first section will be your tasks. You can locate your candidate by looking at the third column. Select the action **Execute** to open the **Adjunct Parking form**.
4. When you select **Execute**, a form will open for you to complete the parking information. Select the amount of parking, enter the FOP information then select **Submit**.





5. After the Hiring Manager selects **Submit**, the Recruiter will receive an e-mail to **Approve** the transaction. Note: In some schools/colleges this will be the same person.



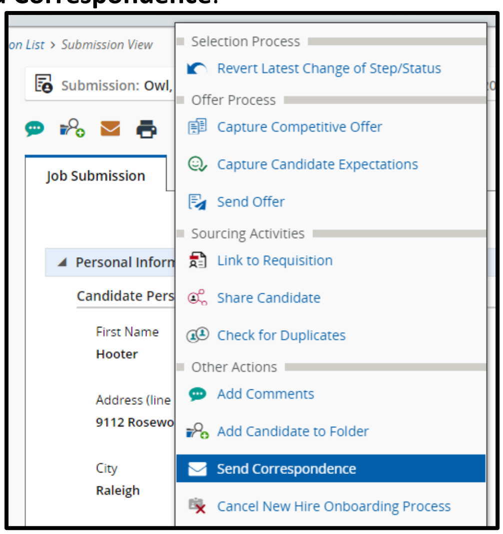
6. Department Recruiters can follow the same steps as above to access the parking authorization. Select **Execute** to open the authorization. You will be able to review the information entered by the Hiring Manager. At the bottom, choose either **Approve** or **Disapprove** and input your initials. **Please be sure to approve parking for current or future semesters only.** Approval for a past semester will not be processed through to Parking Services. Select **Submit** to send the authorization.
7. A report will be sent to **Parking Services** notifying them of the Adjunct's name, TUid, and that parking has been authorized for current and future semesters only.

Modifying Duties After Hire – Adjunct

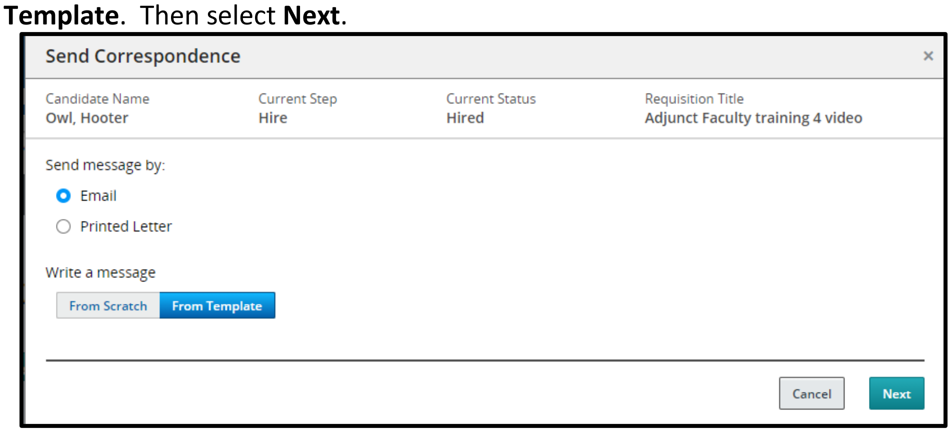
If your Adjunct or Adjunct Artist in Residence has been fully hired into the system and their duties have since been modified, the following steps allow you to inform them of any changes. You do not need to send a new appointment letter, as there is language in all letters covering a change in duties. You will be sending correspondence from the system to inform the Adjunct or Artist in Residence of the changes.

1. Open the Adjunct or Artist in Residence's submission. Make sure you remove the **in selection process** filter so you can view all of your candidates for a specific requisition.
    a. The Adjunct or Artist in Residence's **Step/Status** must be **Hire/Hired**.

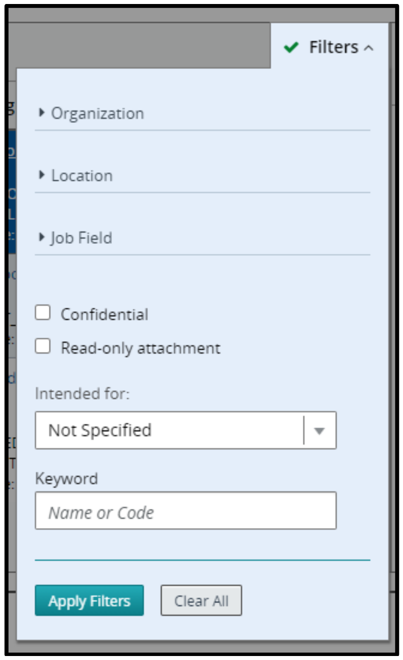
2. From the candidate's submission, select the **Send Correspondence** icon or from **More Actions** select **Send Correspondence**.



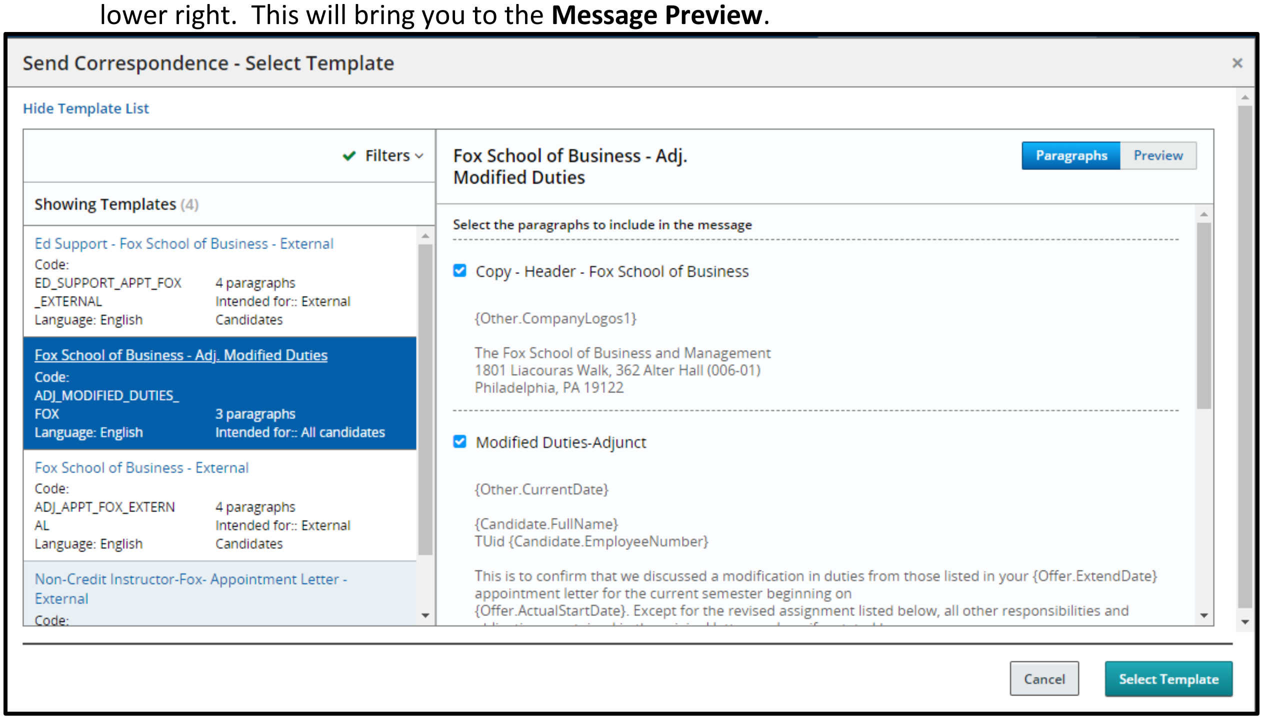
3. Select the radio button for **Email** from **Send message by** at the top. Select **From Template**. Then select **Next**.



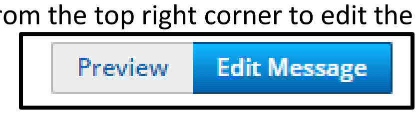
4. Open the **Filters** and in the **Keyword** section, type your school/college name then select **Apply Filters**.



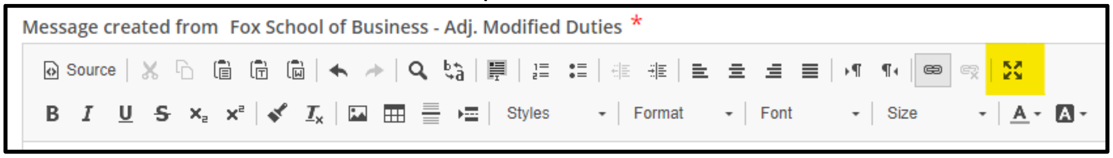
5. Use the Template Selector to choose the **Modified Duties Template** for your **School/College**. Leave all sections checked and select the **Select Template** button in the lower right. This will bring you to the **Message Preview**.



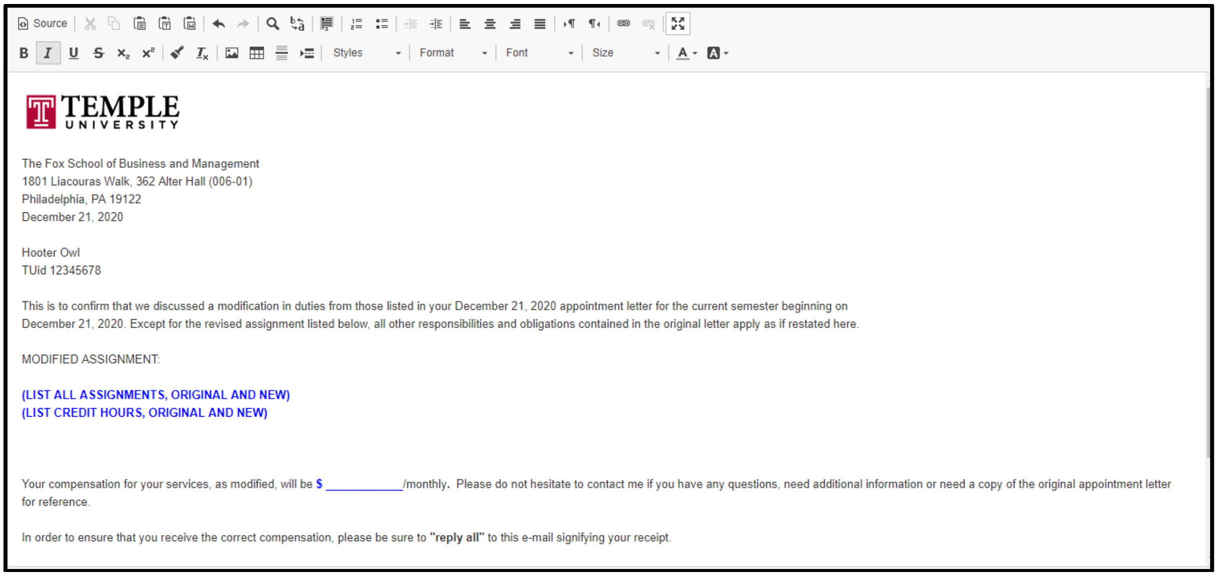
6. Select **Edit Message** from the top right corner to edit the message.



7. Use the **Maximize** button to view your modified duties letter in a full-screen format.



8. Complete the required changes highlighted in the blue typeface – old assignment, new assignment, payment changes, etc. Then select the **Maximize** button to exit the full screen.



TEMPLE UNIVERSITY

The Fox School of Business and Management
1801 Liacouras Walk, 362 Alter Hall (006-01)
Philadelphia, PA 19122
December 21, 2020

Hooter Owl
TUid 12345678

This is to confirm that we discussed a modification in duties from those listed in your December 21, 2020 appointment letter for the current semester beginning on December 21, 2020. Except for the revised assignment listed below, all other responsibilities and obligations contained in the original letter apply as if restated here.

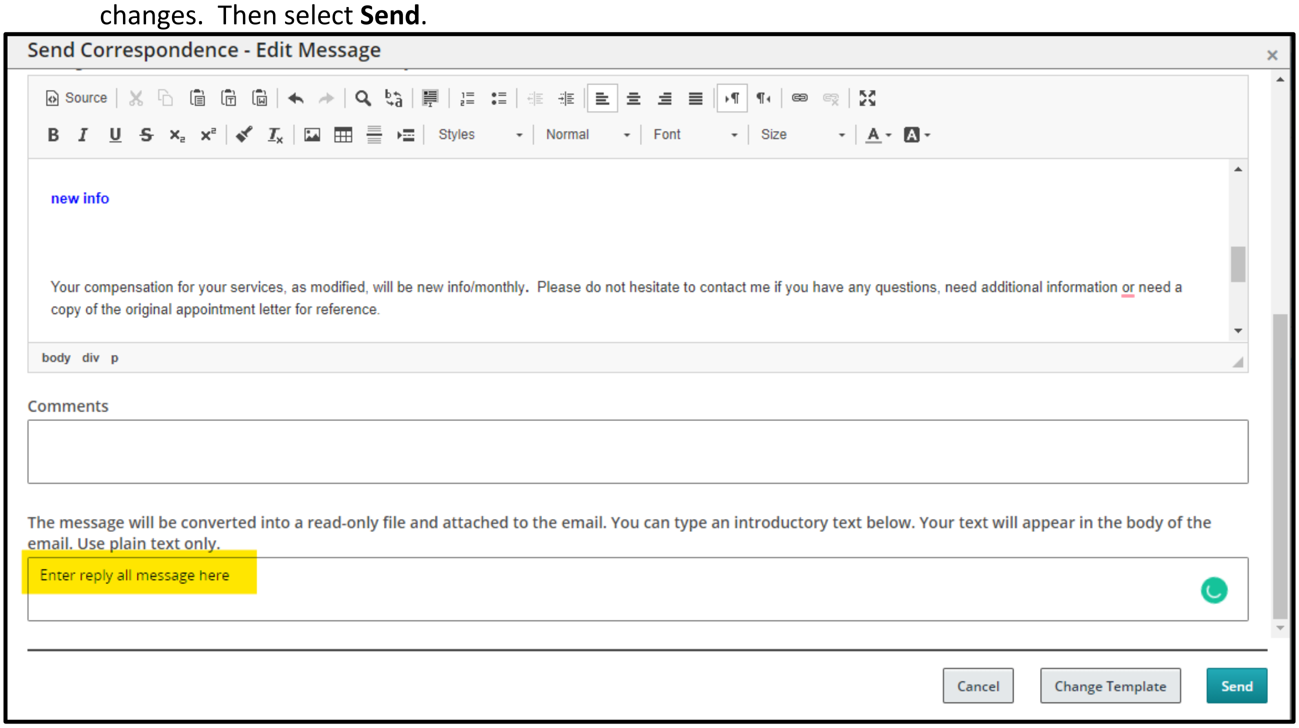
MODIFIED ASSIGNMENT:

(LIST ALL ASSIGNMENTS, ORIGINAL AND NEW)
(LIST CREDIT HOURS, ORIGINAL AND NEW)

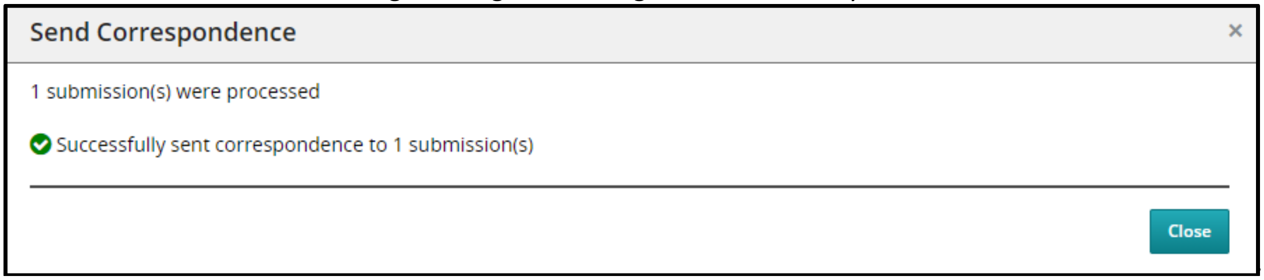
Your compensation for your services, as modified, will be $ ___________/monthly. Please do not hesitate to contact me if you have any questions, need additional information or need a copy of the original appointment letter for reference.

In order to ensure that you receive the correct compensation, please be sure to "**reply all**" to this e-mail signifying your receipt.

9. Review your changes. Scroll to the bottom of the window and enter a message to the candidate in the bottom box (not the comments box) reminding them to Reply All to the changes. Then select **Send**.



10. You will receive a message stating the message was successfully sent to the candidate.

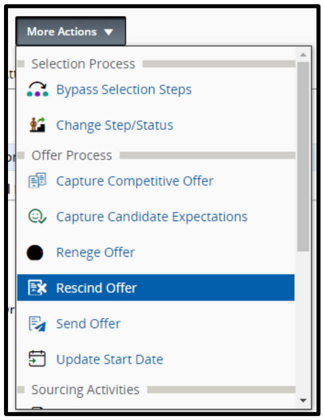


11. When the Adjunct or Artist in Residence **replies all**, Payroll/Data Management will receive the response.
12. **Do not rescind the previous E-offer**. There is no further action required of you unless the modified duties require a different FOAP.
    a. If you are paying with a FOAP different from the original E-offer, you will need to complete an EPAF.

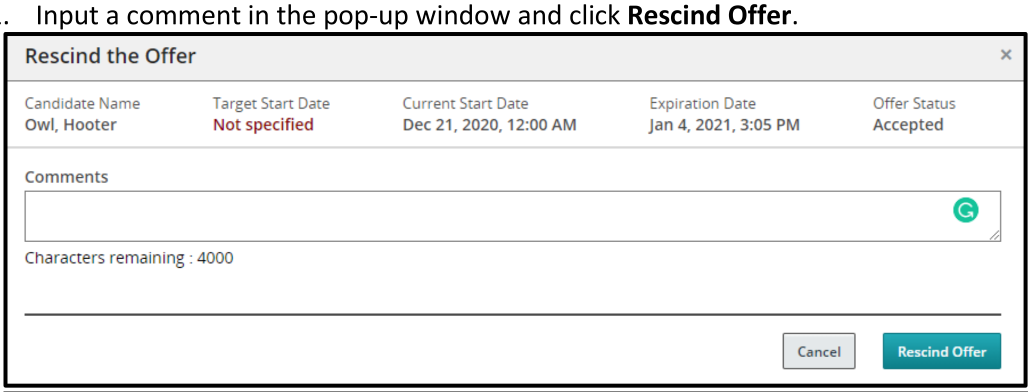
Rescinding and Resending Offers

If you have extended an offer to an incorrect or invalid email address, you must send a request to Taleo Help to change the email address. Once the email address has been changed, the offer must be rescinded and revised before being resent. Otherwise, the original offer will continue to be sent to an invalid email address.

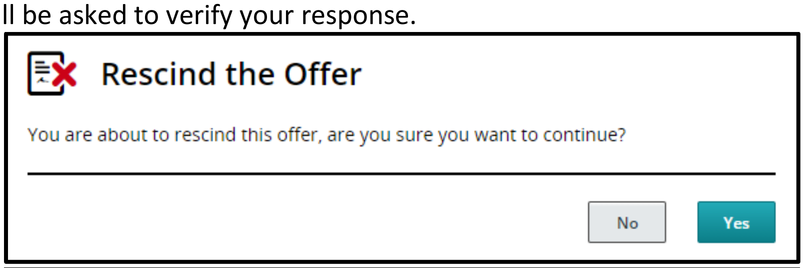
1. Navigate to your candidate's submission. From **More Actions** select **Rescind Offer**.



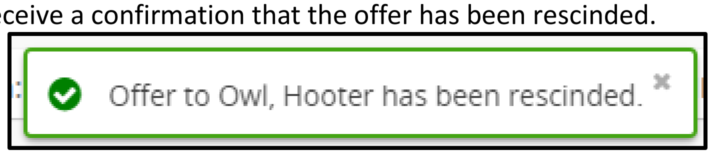
2. Input a comment in the pop-up window and click **Rescind Offer**.



3. You will be asked to verify your response.



4. You will receive a confirmation that the offer has been rescinded.



5. Refer back to the steps regarding how to create and extend an offer now that your previous offer was rescinded.