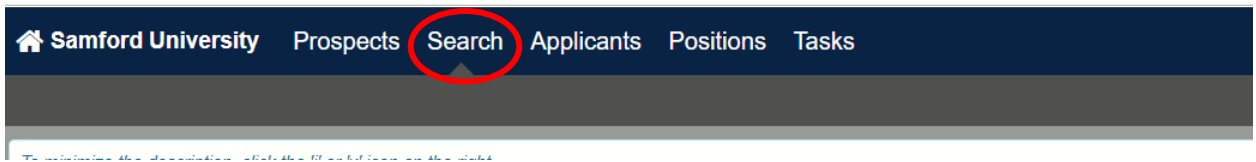


## HIRETOUCH – APPLICANT SCREENING

1. HireTouch is Samford’s new applicant tracking system. It can be accessed through the portal under the Employee section.
2. Samford managers will use their normal User ID and password to log on to the system.
3. Once in the system, a group of dashboards will be displayed showing various action items available to you.
4. You can click on listings in a variety of these boxes to work with a particular record but many functions will need to be performed based on a particular job posting and one applicant at a time.
5. Job postings and their specific applicants can be viewed by clicking on the **SEARCH** (think Job Search) option in the top menu bar.



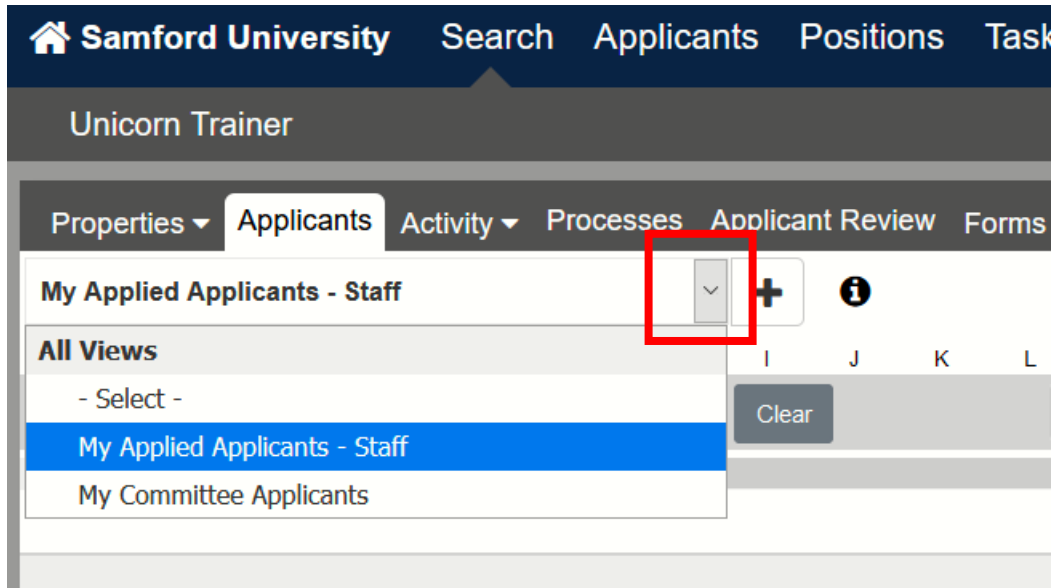
6. Here you will see a listing of current job postings which you have access to view.

Title ▼	Status	Job ID	PCN	Req #	Category	School	Department	Created	Opened	Closed	Posting Approval	Committee Member Selection	Committee Applicant Selection	Offer Approval
*Blank Template - Staff 10.2.18 LS	Archive	3	424	K1810003	Staff: Full-time Staff		110755 Samford Testing Program	10/02/2018	10/02/2018	12/21/2018	●			
*Blank Template - Staff 9/19/18 LS	Archive	1	464646	K1810001	Staff: Full-time Staff		110755 Samford Testing Program	09/19/2018			●			●
*Marketing Director	Archive	2	092118	K1810002	Staff: Full-time Staff		110755 Samford Testing Program	09/21/2018	09/21/2018	03/31/2019	●			●
Admin Asst III	Archive	16	ADMI76	K1810015	Staff: Full-time Staff		Test Department	11/28/2018	11/28/2018	12/05/2018	●			●
Administrative Assistant II, HCAS	Archive	63	DFRE65	K1910057	Staff: Full-time Staff	Provost	111003 Dean Howard College of Arts & Sci	07/31/2019			○			
Apple Picker	Archive	27	12345	K1810026	Staff: Full-time Staff		Samford Testing Program	12/21/2018	12/20/2018	01/03/2019	●			●
Bookstore Manager	Archive	36	BOOK22	K1910035	Staff: Full-time Staff		500740 Bookstore	02/07/2019	02/07/2019		●			●
Critical Languages Prog Asst	Archive	49	CRTL94		Staff: Part-time Staff	Provost	111125 Critical Languages	07/24/2019			●			
Director of Ticket Operations	Archive	74	HCOP96	K1910068	Staff: Full-time Staff	Business Affairs	501301 Athletic Director - Administration	08/16/2019			○			
HR Compliance Coordinator	Archive	37	HUMR72	K1910038	Staff: Full-time Staff		500910 Human Resources	05/21/2019	05/22/2019	05/31/2019	●			●

7. The series of icons located to the right of the job indicates the current status of that job. Options range from “Not Started” as a posting to “Offer Approval” when a job offer has been made and the applicant has accepted.

## HIRETOUCH – APPLICANT SCREENING

- By **clicking on the job title**, you can view and work with the applicants who have applied for that specific job. Choose **My Applied Applicants** from the drop down menu at the top for jobs where you are the hiring manager. Choose **My Committee Applicants** if you are a member of a search committee for that job. NOTE: You will not see any applicants until one of these options is chosen.



- Status icons are displayed and updated as you move each applicant through the process. *You will need to update the status for each applicant as you evaluate them. (See Step 18-20 on how to set dispositions as candidates are eliminated.)*

The screenshot shows a table of applicants in the HireTouch interface. The table has columns for Name, Status, Current Employee, Date Applied, Regret Sent, Application, Hiring Mgr/Committee Review, Phone Interview, Interview 1, References, Interview 2, Hire Proposal, Offer, Background, Onboarding, and Disposition. The table is filtered to show 'All Job Applicants - Staff'. The table is organized into three sections: SCREENING, INTERVIEW, and HIRING. The table shows several applicants with various status icons (e.g., green plus, red minus, black circle) indicating their progress through the hiring process.

Name	Status	Current Employee	Date Applied	Regret Sent	Application	Hiring Mgr/Committee Review	Phone Interview	Interview 1	References	Interview 2	Hire Proposal	Offer	Background	Onboarding	Disposition
Applicant, Robust	Hired	Yes	03/13/2019		●	●	●	●	●	●	●	●	+	●	Hired
Cain, Logan	In Process	No	02/07/2019		●	●	●	●	●	+	●	+			
Hannah, Mary Lou	In Process	No	02/06/2019		●	●	●	○							
Matheson, Tracy	Decline - Interviewed	Yes	02/08/2019		●	●	○	+							Not among the most qualified
Mouse, Mickey	Incomplete	No	02/21/2019		+										
Roberts, Ronald	Submitted		02/08/2019		●										

## HIRETOUCH – APPLICANT SCREENING

10. To work with a particular applicant's record, **click on the name of the applicant**. Their demographic information is displayed. Additional information is displayed when each section is expanded by **clicking on the arrows** in the gray heading bars.

Demographics - 03/21/2019 - Activity - Documents - Processes - Evaluations - Accusource background checks

**Demographics** (32) Last Updated: 03/21/2019 at 8:18 AM

Name: Mr. Robust G. Applicant  
Address: 123 Market Street, Apt. 1B Building 3  
Hometown, Alabama 99555  
Home Phone: 2055551111  
Cell Phone: 2055552222  
Email: jastewa2@samford.edu  
Current Employee: Yes  
Employee ID: 900001085  
Education Level: Doctorate  
Race:  
Gender:  
Ethnicity:  
Registered: March 13, 2019 at 9:38 AM  
Last Updated: July 24, 2019 at 5:05 PM

**Correspondence** (19) Last Updated: 08/13/2019 at 2:25 PM

**Documents** (1) Last Updated: 03/20/2019 at 5:44 PM

**Events** (1) Last Updated: 03/20/2019 at 5:58 PM

**Notes** (1) Last Updated: 03/20/2019 at 5:58 PM

**Tasks** (10) Last Updated: 03/20/2019 at 5:59 PM

**Education** (5) Last Updated: 03/13/2019 at 11:28 AM

**Employment** (11) Last Updated: 03/13/2019 at 11:15 AM

**References** (5) Last Updated: 03/13/2019 at 1:32 PM

11. Specific documents for an applicant can be viewed or downloaded by choosing **ACTIVITY** from the menu bar and then **DOCUMENTS** from the submenu that appears.

Samford University Prospects Search Applicants Positions Ta

Logan Cain

Demographics Jobs Activity Processes Evaluations Accusource Background

**Activity**

- Activity
- Alerts
- Correspondence
- Documents**
- Events
- Notes
- Tasks
- Trigger History

**Demographics**

Name: Mr. Logan Cain  
Address: P.O. Box 224  
Hometown, Ala  
Home Phone: 2055551234  
Cell Phone: 2051234567

# HIRETOUCH – APPLICANT SCREENING

The following display is presented:

Demographics ▾ Jobs ▾ Activity ▾ Duplicates Processes Evaluations Accusource Background Checks

Documents


⚠ Due to permission settings on document types, there may be more documents than are listed.

Search [ ] Show Active  Show Archived  Document Types [ ] Search [ ] Clear [ ]

Name	Type	Job	File	Size	Modified	User	Notes	Tasks
Employment Application	Application	Admin Asst III	Employment Application.pdf	247.19 KB	Wed 12/5/18 at 7:26 PM	Mark Twain	0	0
Mark Twain	Other	Admin Asst III	AR4EC - Arkansas Withholding Certificate.pdf	311.89 KB	Wed 12/5/18 at 7:25 PM	Mark Twain	0	0
Mark Twain	Unofficial Transcripts	Admin Asst III	2018 fw4.pdf	126.82 KB	Wed 12/5/18 at 7:24 PM	Mark Twain	0	0
Mark Twain	Writing Samples	Admin Asst III	Shuttle-Map.pdf	588.20 KB	Wed 12/5/18 at 7:24 PM	Mark Twain	0	0
Mark Twain	Cover Letter	Admin Asst III	2018 fw4.pdf	126.82 KB	Wed 12/5/18 at 7:23 PM	Mark Twain	0	0
Mark Twain	Resume/CV	Admin Asst III	A4.pdf	41.73 KB	Wed 12/5/18 at 7:23 PM	Mark Twain	0	0

Records 1-6 of 6 Per Page 10 ▾

+ Add a Document Convert Documents Download Documents

12. By clicking on the file name or Adobe icon , you can download or print the individual documents for this applicant. Documents are stored in the system so it is not necessary to print all documents.

13. As you review applicants for a particular job, the disposition of each applicant can be updated as needed by clicking on the status icon next to their name.

Name	Status	Current Employee	Date Applied	Regret Sent	Application	Hiring Mgr/ Committee Review	Phone Interview	Interview 1	References	Interview 2	Hire Proposal	Offer	Background	Onboarding	Disposition
Cain, Logan	In Process	No	02/07/2019		●	●	●	●	●	●	●	●			
Hannah, Mary Lou	In Process	No	02/06/2019		●	●	●	●	●	●	●	●			
Matheson, Tracy	Decline - Interviewed	Yes	02/08/2019		●	●	●	●	●	●	●	●			Not among the most qual
Mouse, Mickey	Incomplete	No	02/21/2019		●										
Roberts, Ronald	Submitted		02/09/2019		●										

14. Select the appropriate status and choose SAVE. (See Step 19-20 for setting Disposition reasons)

Samford University Prospects Search Applicants Positions Tasks Resources

Systems Programmer - HR

Properties ▾ Applicants ▾ Activity ▾ Processes Applicant Review Forms ▾ Job Prospects Posting ▾ Positions

All Job Applicants - Staff

Search [ ] Advanced Search [ ] Clear [ ]

Interview Process

Status	Date	User
Scheduled	Fri 2/8/19 at 2:48 PM	Samford Hiring Mgr
Not Started	Fri 2/8/19 at 12:43 PM	Julie Stewart

Update Status

Status:

- Not Started
- Qualified: Proceed
- Complete / No Longer Considered

Save [ ] Close [ ]

15. As the applicant review processes continues and their status is updated at each point, one or more candidates (if this is a pooled positions) will be selected for hire. You are ready to

## HIRETOUCH – APPLICANT SCREENING

complete a Hire Proposal for your top candidate. By **clicking on the Hire Proposal status icon**, you will be taken to a page where you can **START** the Hire Proposal.

Demographics ▾ Jobs ▾ Activity ▾ Processes Evaluations Accusource Background Checks									
Forms									
Form Name	Due Date	Status	Submitted	Recertify	Recertified By	Action	Approval	History	
<input checked="" type="checkbox"/> Pre-Screening									
<input checked="" type="checkbox"/> Pre-Screening Survey			2/7/19 10:31 AM	Recertify		View   Re-generate PDF   Edit		View History	
<input checked="" type="checkbox"/> Employment Application - Staff	2/21/19		2/7/19 10:50 AM	Recertify		View   Re-generate PDF   Edit		View History	
<input checked="" type="checkbox"/> Hire Proposal									
<input checked="" type="checkbox"/> Hiring Proposal									

16. Once the Hire Proposal is complete, ensure that a member of HR, usually Lisa Vines, is selected to approve the proposal. Select **Save and Send Task**. This notifies someone that you have completed this step and are ready for an offer to be made.

Demographics ▾ Jobs ▾ Activity ▾ Processes Evaluations Accusource Background Checks

Job Form Approvals

**Form: Hiring Proposal**  
Form Originator: Stewart, Julie

Title	Name
Employment Coordinator	Approver: <span style="border: 1px solid #ccc; padding: 2px;">Vines, Lisa ▾</span>

Save AND Send Task
 

 Save Approvers ONLY

Group Approval  
 Daniel, Jennifer  
 Stewart, Julie  
Vines, Lisa  
 Windham, Joel

17. Once you submit this proposal, HR will make an offer and you will be able to see when the candidate has accepted based on the status icon below the **OFFER** label.

18. Candidates should be dispositioned as they are eliminated from consideration. . It is a good practice to keep your top three candidates active until the chosen candidate has accepted the offer and passed the background search. Once this has taken place, you should complete the dispositioning of all remaining candidates indicating at what point they were eliminated.

19. You will do this by choosing a disposition from the status icon; select the appropriate Status and select SAVE.

<input type="checkbox"/>	Hannah, Mary Lou	In Process	No	02/06/2019	●	<span style="border: 2px solid red; padding: 5px; display: inline-block;"></span>
--------------------------	------------------	------------	----	------------	---	---

## HIRETOUCH – APPLICANT SCREENING

Status	Date	User
Not Started	Fri 8/16/19 at 5:07 PM	Julie Stewart
Qualified: Proceed	Fri 2/8/19 at 12:43 PM	Julie Stewart
Not Started	Thu 2/7/19 at 10:50 AM	Mary Lou Hannah

Update Status

Status:

- Qualified: Proceed
- Did Not Meet Minimum
- Met Minimum: Not Interviewed

Save Close

20. You should now have the option to select a Disposition for each candidate that did not receive an offer. This Disposition is located at the end of the row of options beyond Offer and Onboarding. If it is not visible, you may need to expand the screen view by clicking on the arrows at the top of the page.

Samford University Prospects Search Applicants Positions Tasks Resources

Systems Programmer - HR

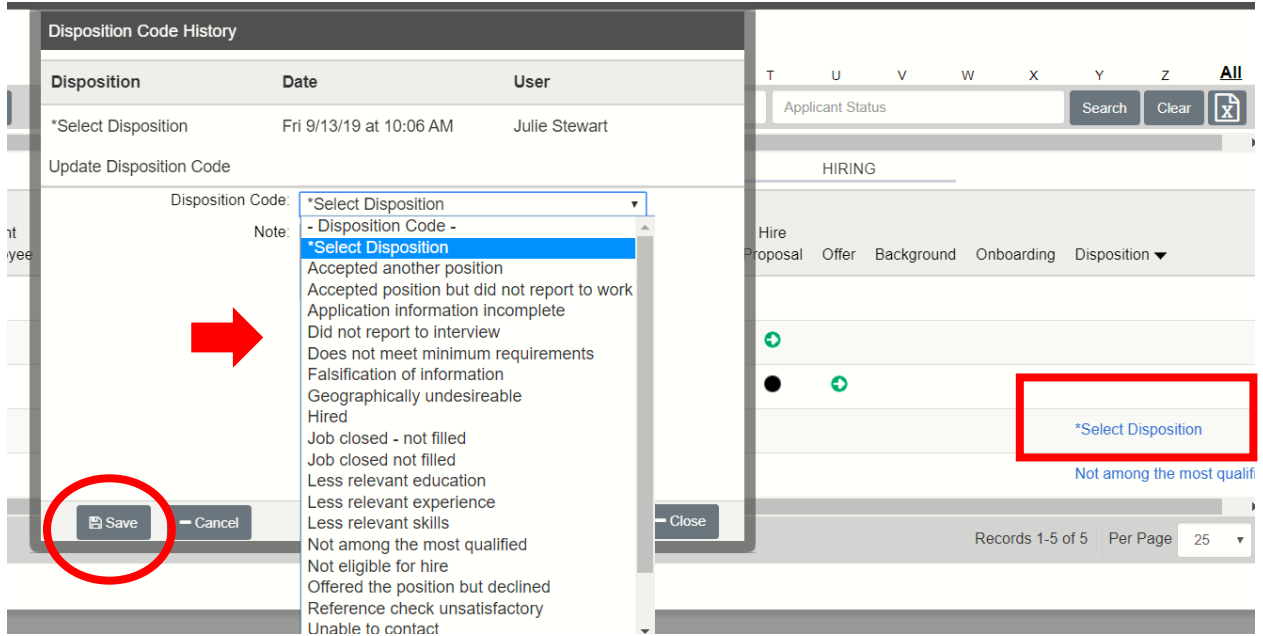
Properties Applicants Activity Processes Applicant Review Forms Job Prospects Posting Positions

All Job Applicants - Staff

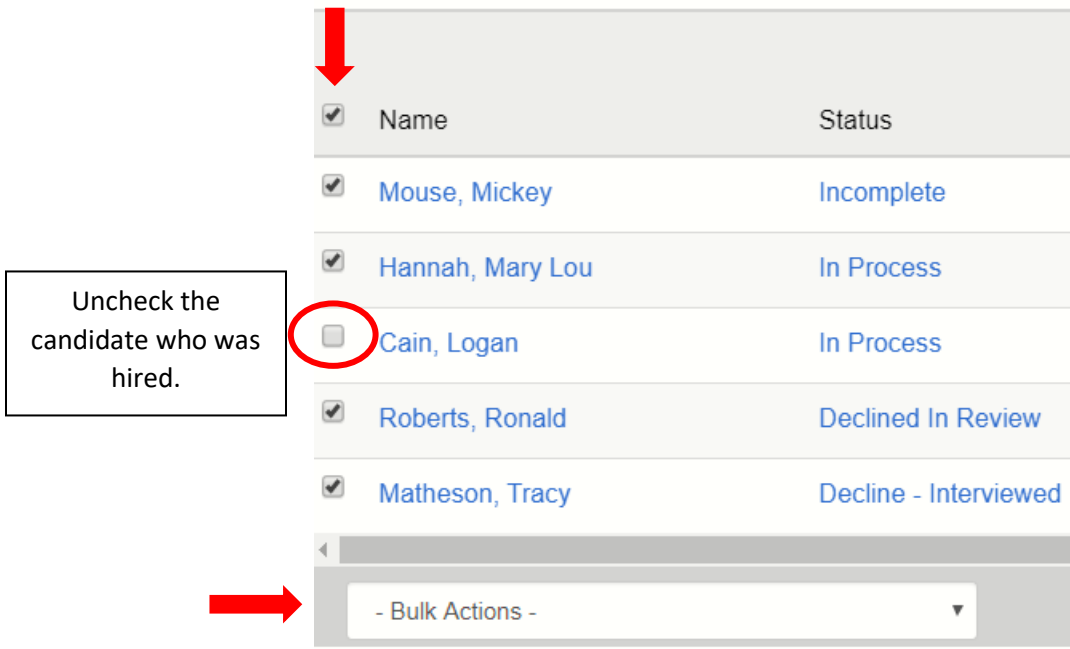
Name	Status	Current Employee	Date Applied	Regret Sent	Application	Hiring Mgr/Committee Review	Phone Interview	Interview 1	Interview 2	Hire Proposal	Offer	Background	Onboarding	Disposition
Mouse, Mickey	Incomplete	No	02/21/2019					1	2					

21. Once visible, click on the blue instruction “\*Select Disposition” for each candidate to choose the appropriate disposition indicating why they were not chosen. Then click SAVE. This is similar to completing the Applicant Referral Form from the paper process and is a required step.

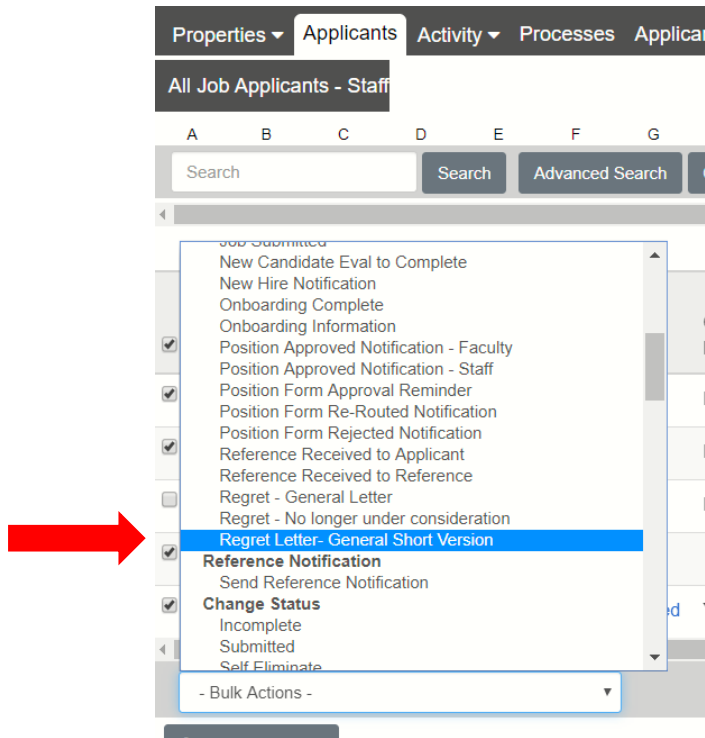
## HIRETOUCH – APPLICANT SCREENING



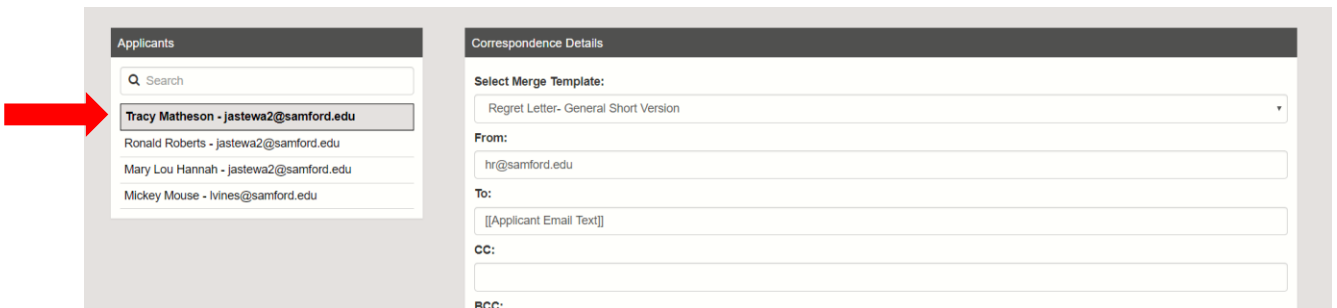
22. Once the selected candidate has accepted the offer and passed the background check, you should send a regret email to the remaining candidates. You can do this by clicking on the box to the left of each name and choosing the Regrets Letter from the Bulk Actions drop down list under Correspondence. **TIP:** You may select all candidates by clicking in the box next to the NAME heading **but remember to uncheck the chosen candidate** so they do not receive a regret letter and an offer. This would be unfortunate.



## HIRETOUCH – APPLICANT SCREENING



23. The email template will appear for you to review. From here you have the option to choose SEND, which sends to the candidate currently highlighted; or to SEND TO ALL, which sends to all of the candidates chosen from the previous page. **REMEMBER** to uncheck the chosen candidate prior to sending regret email. You can close this window to go back to the selection page if you are not certain.





## HIRETOUCH – APPLICANT SCREENING

Selecting SEND will only send to the individual highlighted above.

SEND TO ALL will send to everyone on the list.

