Talentlink Selection Process Guide

How to Create and Manage a Selection Process

Created: [March 2018] Version 1
Author: [Melissa Kang]

Introduction

The Selection Process applies to candidates registered in the Back Office and defines all the steps that a candidate must go through before they receive a hiring offer. As an administrator you can define the number of steps the candidate must go through, the type of selection steps, the expected output and any templates which are to be used for communication with candidates and recruiters. You can define selection processes with up to 25 steps.

Throughout the guide, you will see the following icons which indicate the WMJobs Team's recommendations which will help you with all your [title] queries.

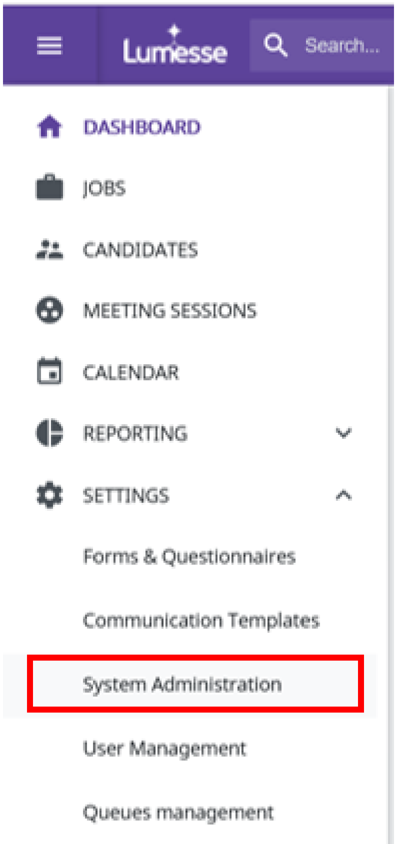
Top tips

Important Information

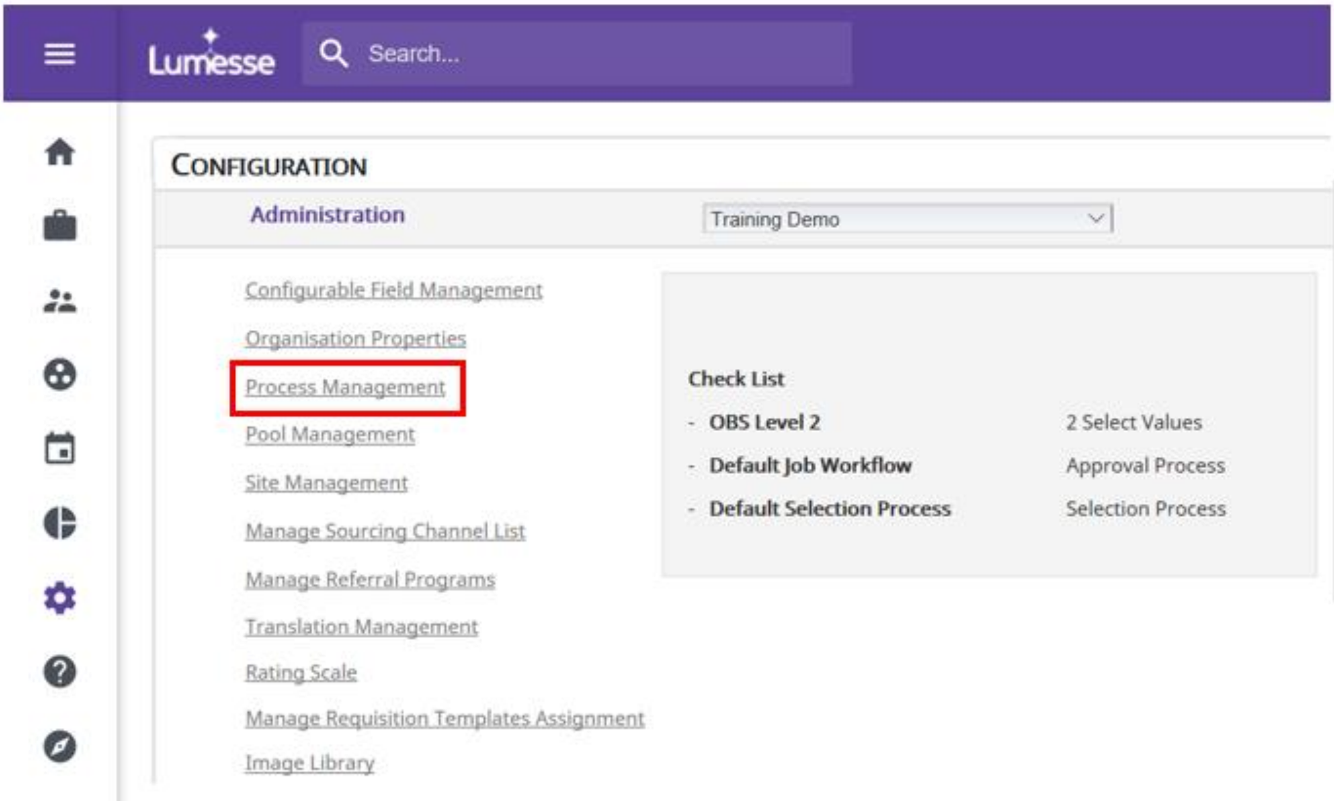
Best Practice

1. Creating a selection process

To navigate to 'Selection Process", log-in to Talentlink, and from the left-hand menu, click the arrow next to '**Settings**' and select '**System Administration**';

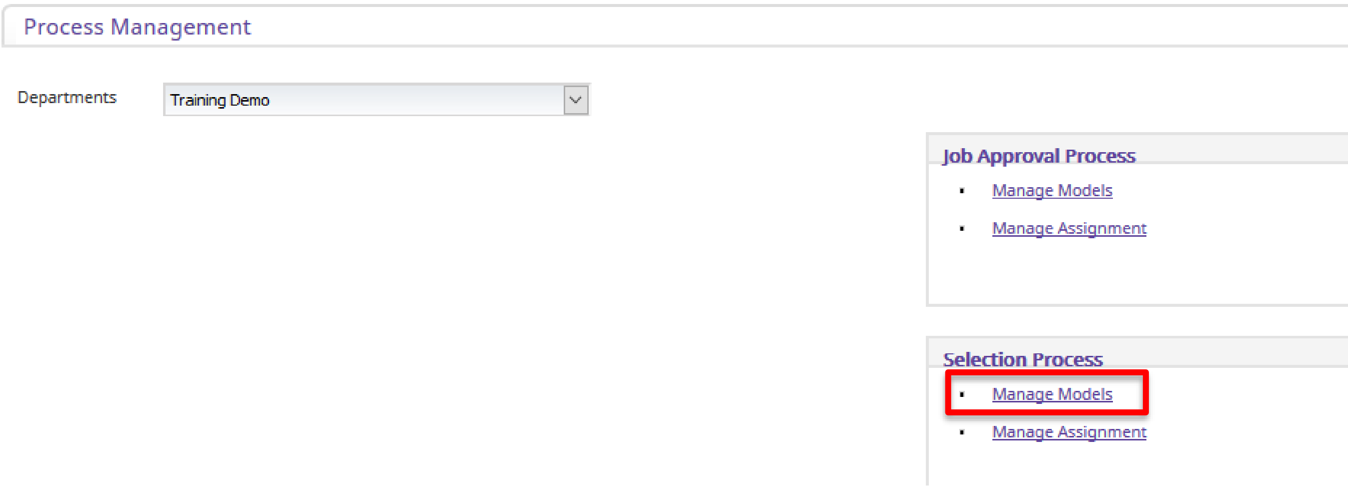


From the list under 'Administration', select, '**Process Management**';

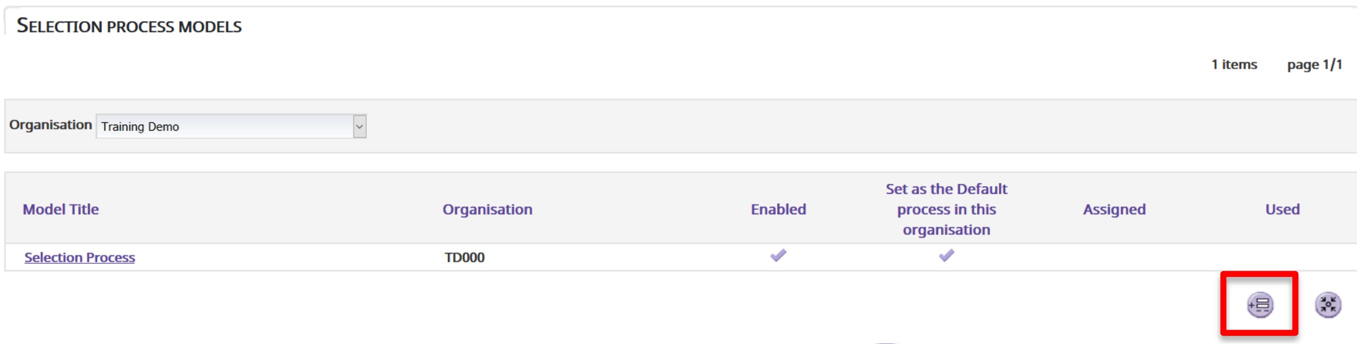


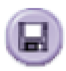
When you click onto ‘Process Management’, you will see you have access to all the processes which exist in your organisation – Job Approval, Default Application, Workflow and **Selection process**;

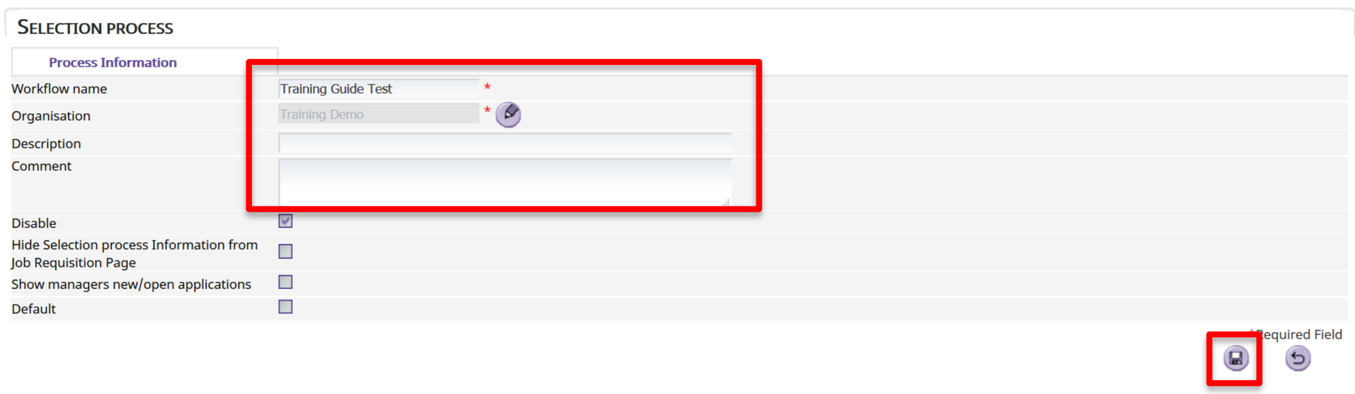
On the Process Management page, select Manage Models from the Selection Process section.



On the Selection Process Models page, click  to create a new Selection Process.



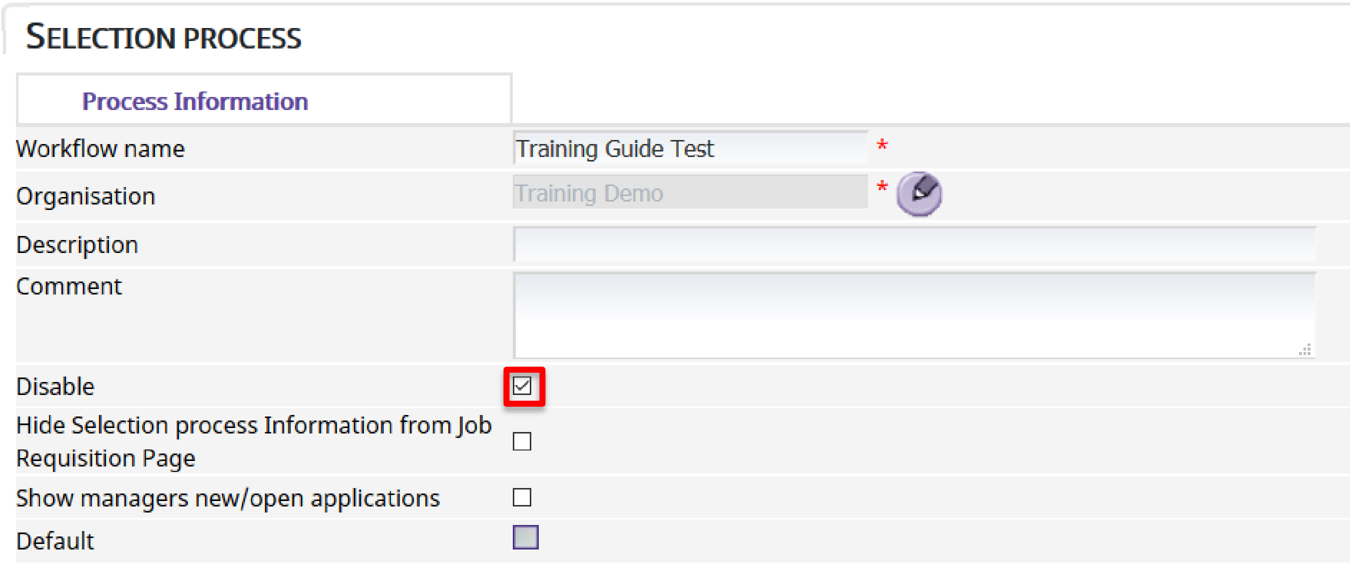
Enter the Workflow name, and if needed a Description, then click 



If you have access to more than one organisation in TalentLink, **ensure you have selected the appropriate organisation**

2. Activating a Selection Process

By default, the process is inactive when it is created. To activate it, remove the tick from within the disable box.

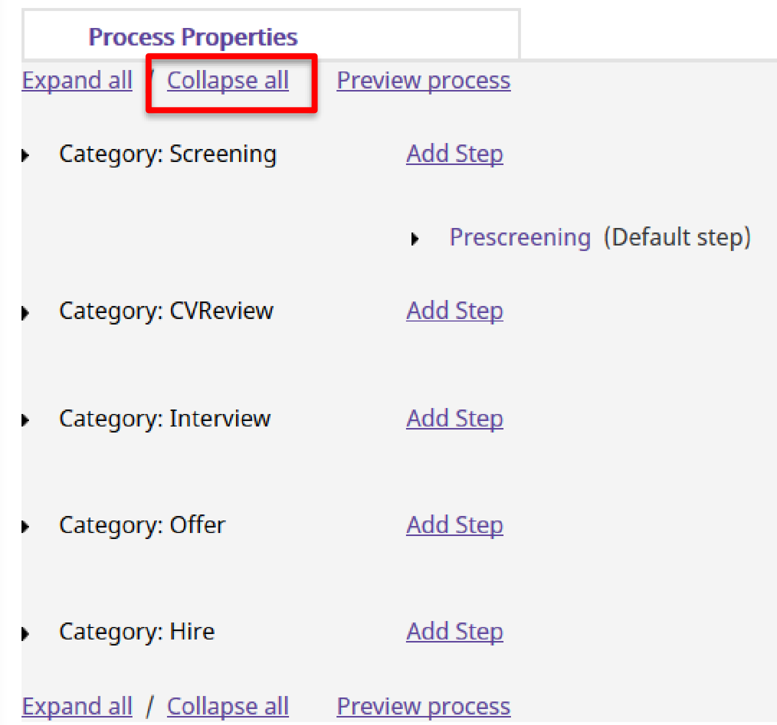


If you do not want to display information about the Selection Process on the Job Requisition page, select **Hide Selection process information from Job Requisition Page**.

The option **Show Managers new/open Applications** controls the visibility of candidates for MSS users. MSS users see jobs and applications only if they are member of a job's operational team AND the application is short listed. If this option is selected all applications are immediately visible.

3. Defining Selection Steps

When you save the new Selection Process for the first time the Process Properties section becomes visible. For a cleaner view of this page, select "Collapse all".



The selection process is broken down into several categories.

- **Screening** – Relating to any tasks that confirm the candidate's suitability for further processing for the requisition.

- **CV Review** – Relates to methods where applications are reviewed to determine the candidate's suitability against a requisition, i.e. Shortlisting.

- **Interview** – Relates to methods where you evaluate the candidate's skills during a meeting, i.e. Interviews and assessments.

- **Offer –** In addition to any offers made to a candidate, this category can be used to manage additional assessments, i.e. References.

- **Hire –** In addition to a hire, this category can be used to manage additional on boarding tasks, i.e. Quality Survey.

Within each category, you can add in steps which build your selection process.

Dependent on the Step Type, specific fields are displayed. The following step types available are:

- Additional Assessment
- Additional Information from Candidate
- CV Review
- Interview
- Session
- External System
- Panel Review
- Quality Survey (only available as an option under the hire category)

You can create up to 25 steps for each Selection Process. For each step you must define:

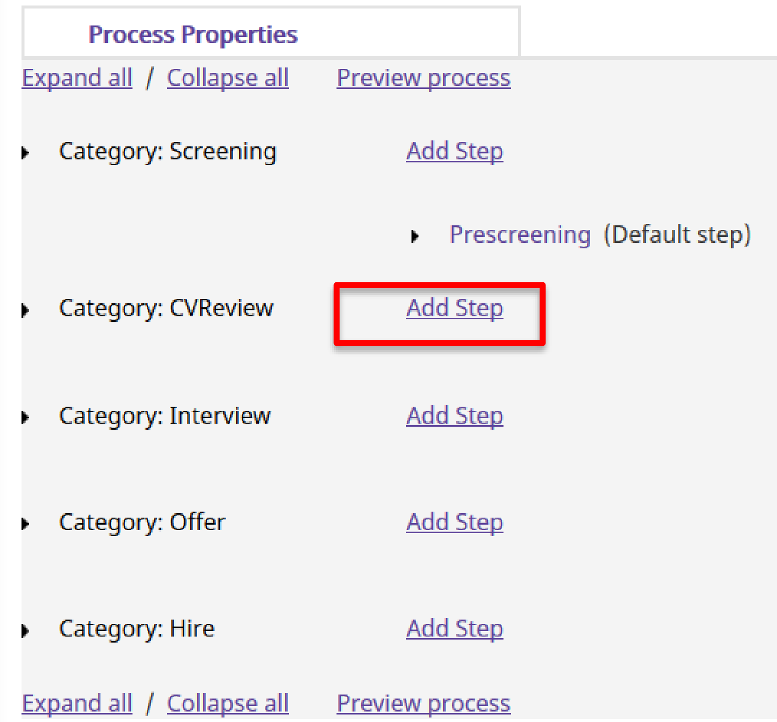
- The step name
- The step type
- The action type
- The team involved
- Expected step output
- Templates to be used (depending on the step type)
- Delay before setting a task as overdue

There is a default step which is enabled whenever a new process is created: The ***Prescreening* step**. No additional configuration is necessary, and the step is pre-configured with the required elements. This step does not have any action assigned to it; you cannot edit it and you can't disable it.

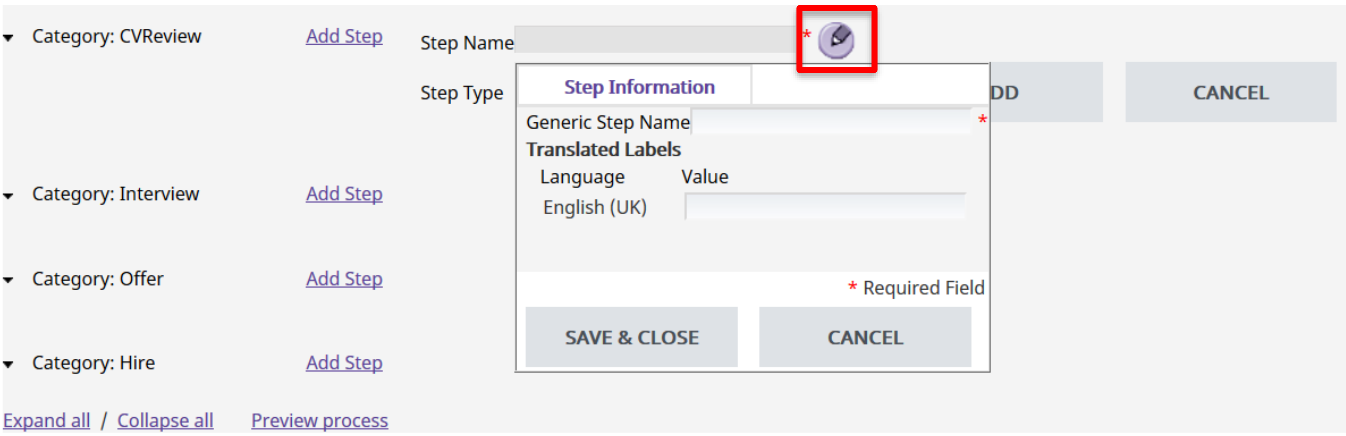
3. Creating a Selection Step

The options that are available and required may vary from one step type to another.

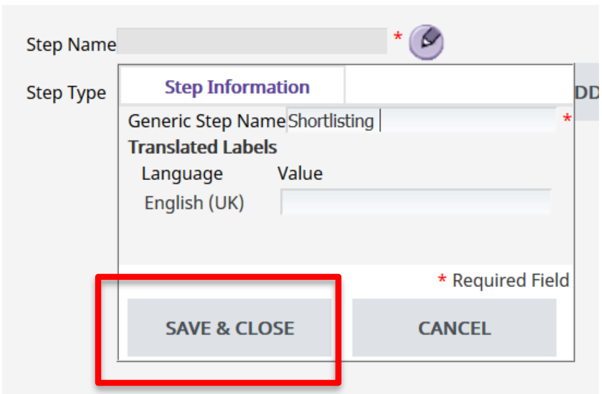
1. To create a new step, click **Add Step** next to the category name



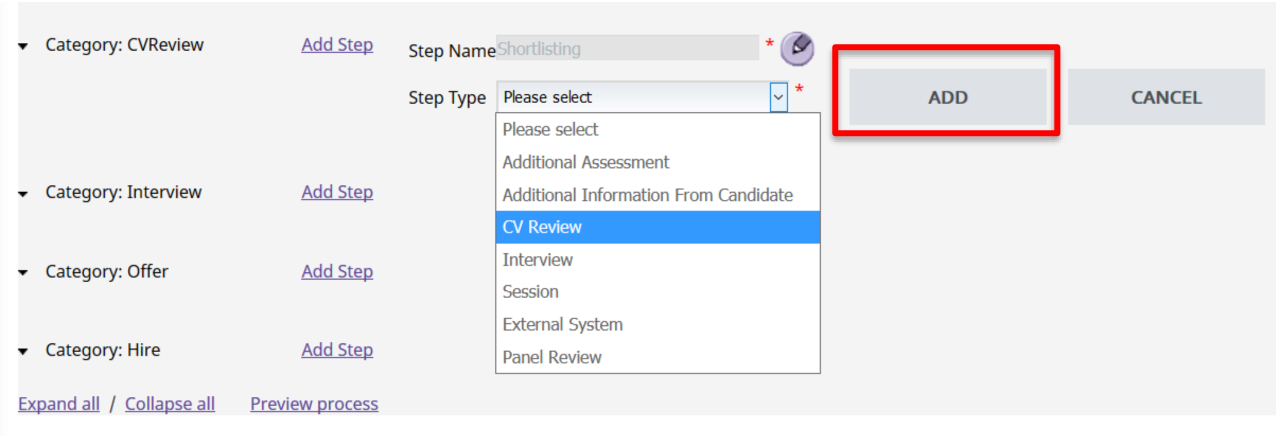
2. Click  to enter the **Step Name**.



3. Type the **Generic Step Name,** then click **Save & Close**.

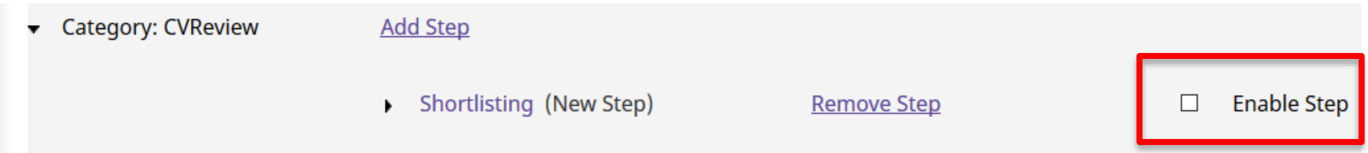


4. Select the **Step Type** from the dropdown list then click **Add** to create the step.



The step is created and the settings are displayed. Click the step name to collapse/expand the settings.

5. Select **Enable Step**.

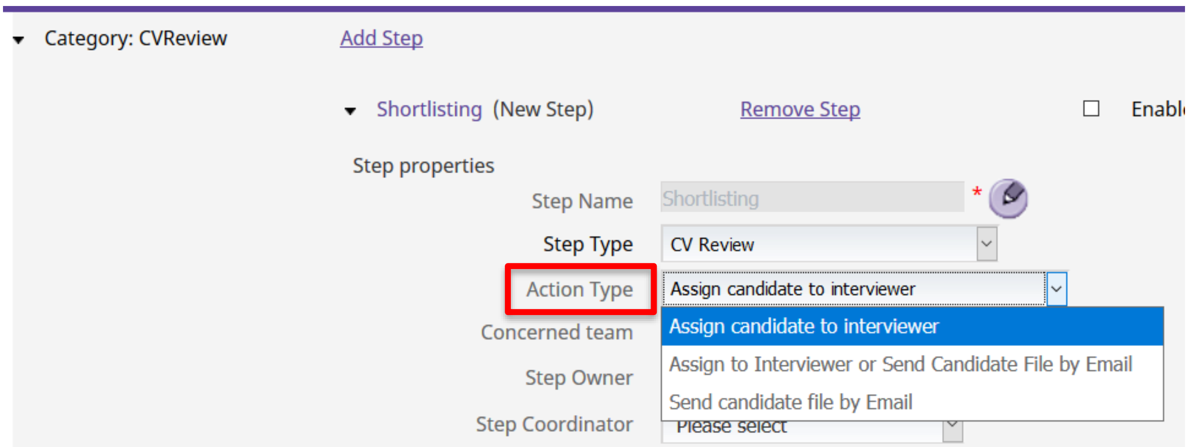


The above actions are identical for all step types; however, the options will vary from one step type to another.

5. Setting Step Properties

Action Type

Select the **Action Type** from the dropdown list.



Depending on the step type you've chosen, this list will either contain one option, or three. The options define who this task is assigned to:

- ***Assign Candidate to Interviewer*** - Sends the task to the Communication Centre of a TalentLink user to complete their feedback within the system.

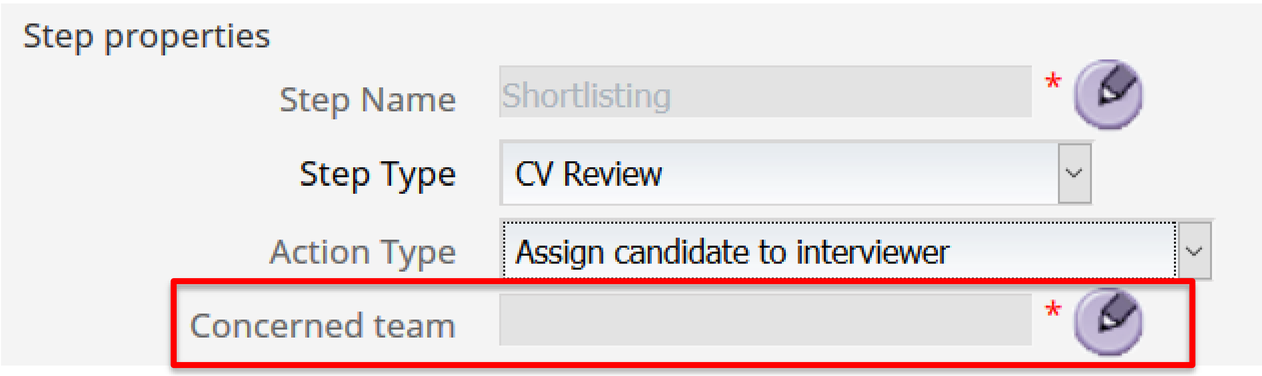
- ***Send Candidate File by Email*** - Sends this task to a non-TalentLink user via email, who will provide their feedback outside of the system.

- ***Assign to Interviewer or Send Candidate File by Email* -** Provides the flexibility to use either method depending on who the recruiter chooses to send the task to.

In each case the task is to fill in the Feedback Report relating to a step.

Concerned Team

Click  to edit the Concerned team. The concerned team specifies which user types have the right to submit, perform and close the step. The option to chose here for all steps created is "**Type 1**".

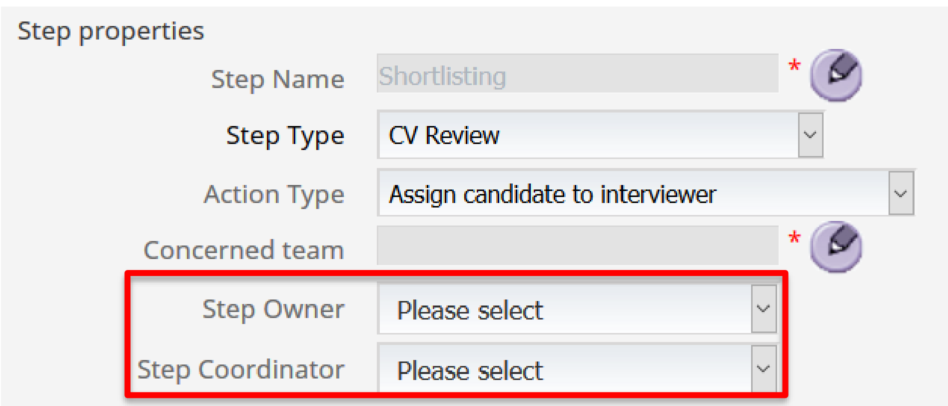


Step Owner and Step Coordinator

Select the **Step Owner** and the **Step Coordinator**.

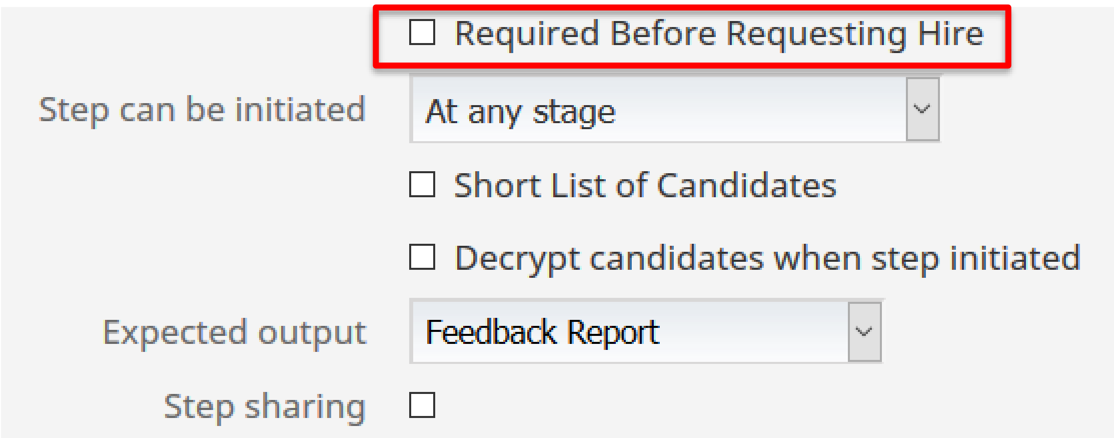
The Step Owner is the user who is automatically tasked with completing the Feedback Form for this step. These can be role users, for example Recruiting Team 1, or named users. If role users are used, they must be added to the team members tab of a job requisition.

The Step Coordinator is the user who receives any messages regarding delays in the process completion, and notifications when the step has been completed.



Required Before Requesting Hire

If you select **Required Before Requesting Hire** the step becomes a milestone in the Selection Process. As the step is mandatory, recruiters must complete it before they are able to start the Hiring Process.

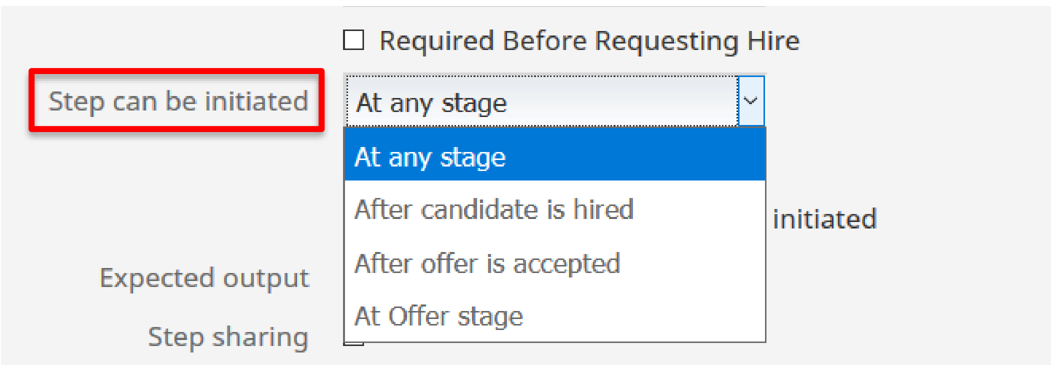


Step can be initiated

Define when the **Step can be initiated**. This means that the availability of the step is related to the current application status.

The options are:

- *At any stage* - The step can be assigned at any stage in the process
- *At Offer stage* - The step can be assigned only when the application status is Offered
- *After offer is accepted* - The step can be assigned after the application status is Offer Accepted
- *After candidate is hired* - The step can be assigned after the application status is Hired



Short List of Candidates

You can choose to shortlist a candidate by selecting **Short List of Candidates**. This means that the specific candidate's file will be visible to Manager users during this step. As per page 5, if the you have "show managers new/open applications" option selected, this option here will not work.

☐ Short List of Candidates

Decrypt candidates when step is initiated

This relates to our old anonymisation functionality. This option must be selected on at least one step of the process, we would suggest this is selected at either shortlisting or interview. Please note as this isn't functionality we currently use; no anonymization action will be assigned.

☐ Decrypt candidates when step initiated

Expected output

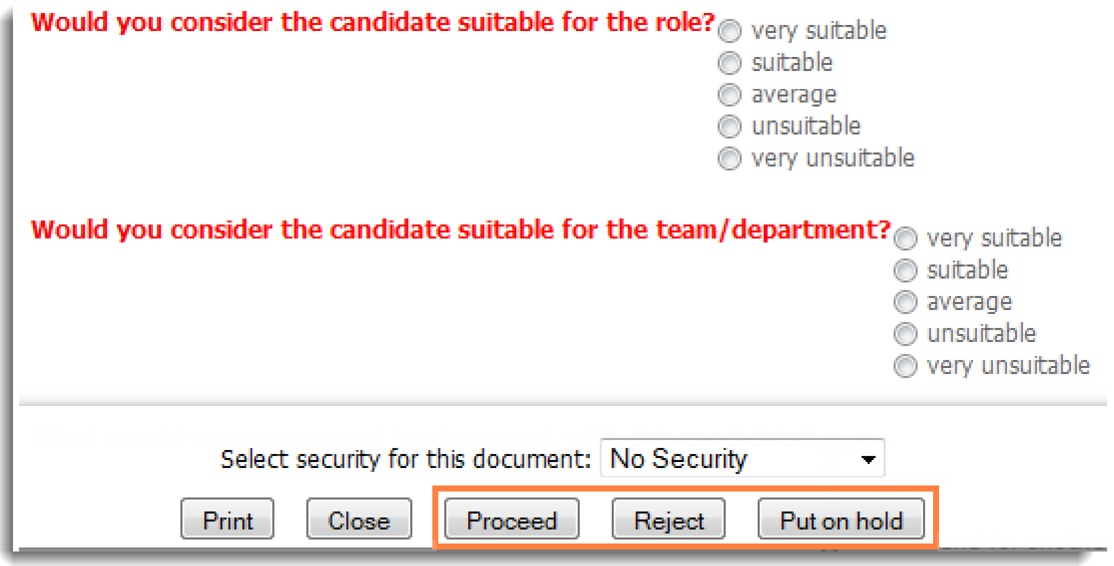
The **Expected output** for a step is related to the Feedback Template selected in the **Step Communication** section.

In general, there are three available options (restricted in some of the step types):

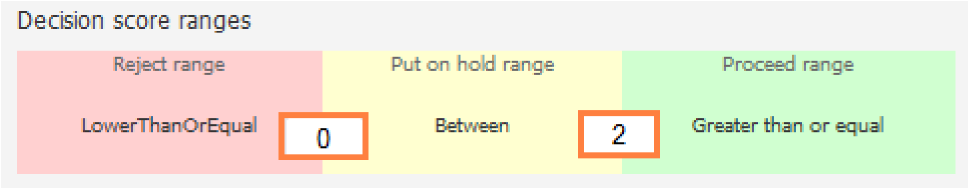
- ***Feedback Report*** – Candidates or recruiters (depending on the step actor) must fill in the Feedback Report
- ***Feedback Report and Decision*** – After a recruiter fills in the Feedback Report they must also take a decision about the candidate (Reject, Proceed or Put on Hold). This decision is related only to the current step, not to the whole Selection Process
- ***Feedback and score decision*** – If a scoring pattern is defined for the Feedback Report template, the system may carry out automatic actions (Reject, Proceed or Put on Hold) on the candidate. The action is related only to the current step, not to the whole Selection Process.

If this option is selected the **Decision score ranges** section is activated. There are three score ranges: **Reject range**, **Put on hold range** and **Proceed range**. Depending on the score received from the Feedback Report the system acts accordingly.

In the example, if a feedback score is:
- Lower than or equal to 0 the step is closed with the decision Reject.
- Between 0 and 2 the step is closed with the decision Put on hold.
- Greater.



If this option is selected the **Decision score ranges** section is activated. There are three score ranges: **Reject range**, **Put on hold range** and **Proceed range**. Depending on the score received from the Feedback Report the system acts accordingly.



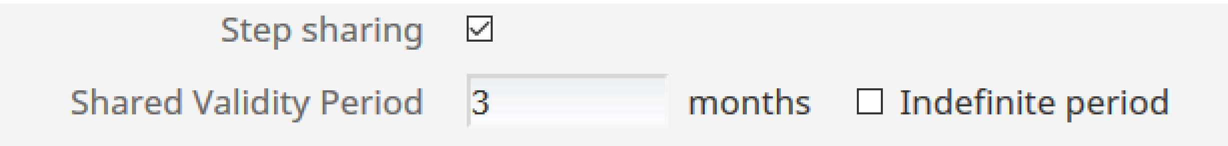
In the example, if a feedback score is:

- Lower than or equal to 0 the step is closed with the decision Reject.
- Between 0 and 2 the step is closed with the decision Put on hold.
- Greater than or equal to 2 the step is closed with the decision Proceed.

Please see the Forms and Questionnaires guide for more information on how to add scores your forms.

Step sharing

If you enable **Step sharing**, feedback on a step can be shared between all applications from the same candidate. As an example, for a test step, the candidate does not need to take the test more than once if applying for more than one position. The step output, in this case the test results, may be shared between different Selection Processes conducted for the same applicant.



You can also define the period when the step output is shared. This may be for a specific period, or indefinitely.

Initiate next step automatically

You can push the process and choose to **Initiate next step automatically**. If this option is active, once the selection step is complete, actions relating to the following step are triggered automatically.

Initiate next step automatically is enabled only if:

- There is at least one subsequent step configured
- Either **Feedback Report and Decision** or **Feedback and score decision** is selected as the **Expected Output**.

In both cases, **Proceed** must be the output decision of the step (either user-selected or automatic). For example, if a recruiter decides to put a candidate on hold, the next step will not be triggered automatically, which also happens if the feedback report score is to reject the candidate based on the score decision.

If you would like to find out more about Automation, then please do contact the WMJobs team.

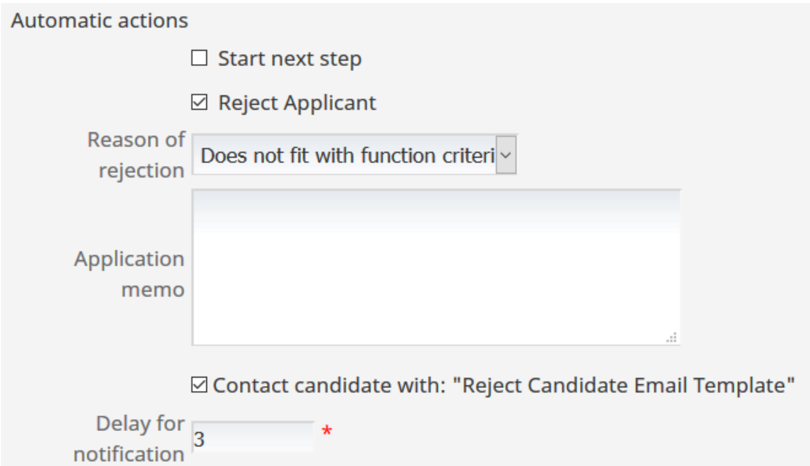
Select **Reject Applicant** to enable a candidate to be rejected permanently from the Selection Process.

This option may be activated only if **Feedback report and decision** or **Feedback and score decision** is selected as the expected output. In both cases Reject must be the output decision of the step.

The system will reject candidates not only at the step level but from the whole Selection Process. The Application Status is *Rejected*.

If the **Reject Applicant** option is selected additional information must be provided:

- Reason of rejection – pick one from the dropdown list
- Application Comments
- Specify whether you want to contact the candidate with the appropriate rejection email
- If you want to contact the candidate you must specify the notification delay (calculated in days). If you select 0 the email is sent automatically once the candidate is rejected; 1 = one day later, and so on

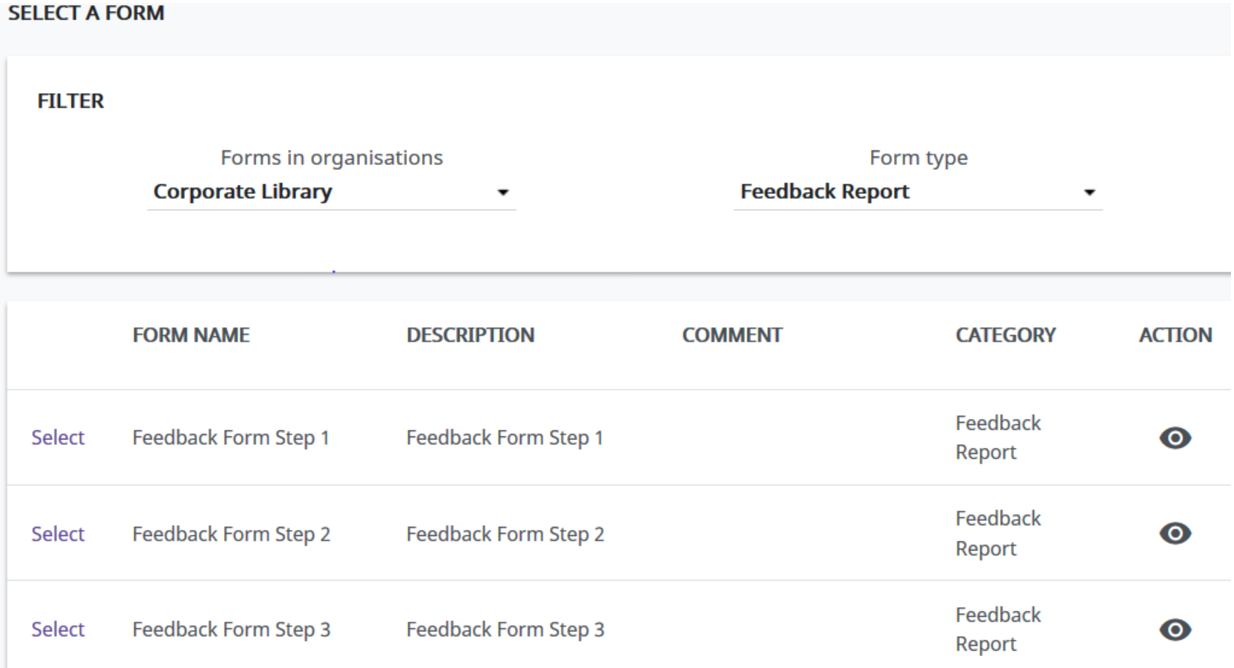


How to add forms into your process

For each step of the process you can assign forms and email templates.

Click  next to **FeedBack Template** to select the Feedback Report you require.

The list of available forms is displayed. If required, you can filter them by organisation. For more information on forms, please see our forms and questionnaires guide.


SELECT A FORM

FILTER

Forms in organisations: Corporate Library

Form type: Feedback Report

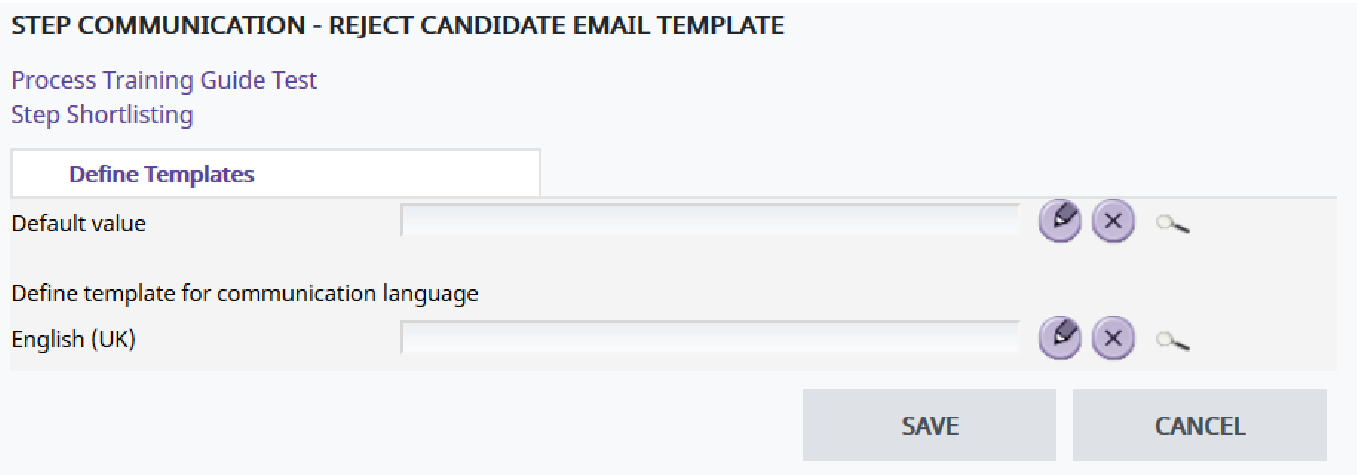
	FORM NAME	DESCRIPTION	COMMENT	CATEGORY	ACTION
Select	Feedback Form Step 1	Feedback Form Step 1		Feedback Report	
Select	Feedback Form Step 2	Feedback Form Step 2		Feedback Report	
Select	Feedback Form Step 3	Feedback Form Step 3		Feedback Report	

To preview a template, click

How to add emails into your process

Click next to **Communication Template** to select the template you require.

The *Communication Template* page is displayed.



Click to choose a default template.

Click if you need to preview a template.

Click if you need to remove a selected template.

Depending on the step type you may select:

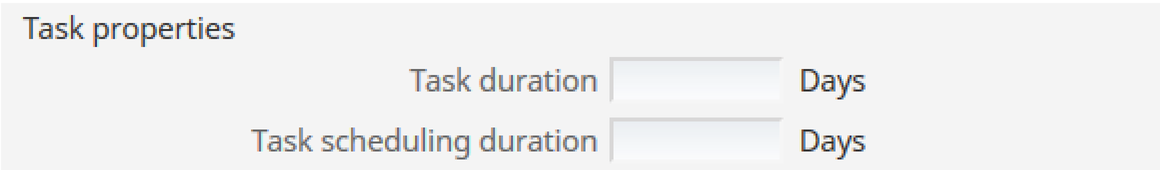
- Reject Candidate Email Template
- Invitation to Candidate, Confirmation to Candidate and Cancellation to Candidate (Interview)
- Confirmation to Interviewer and Cancellation to Interviewer (Interview)

Setting Task Properties

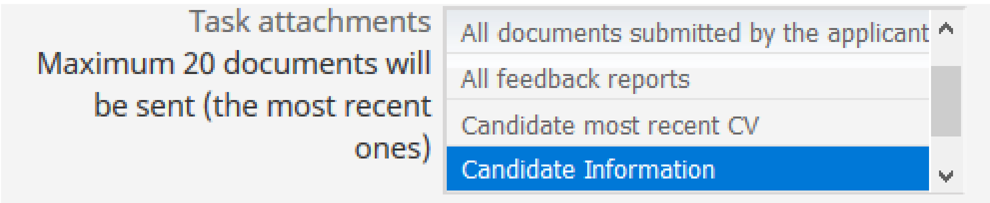
You can define the duration of the task, and the task scheduling duration. This is a good way of informing recruiters and coordinators that tasks are taking longer than expected.

Type the number of days in the **Task Duration** and **Task Scheduling Duration** fields.

When this number is exceeded the user will see the task as overdue on their Talentlink dashboard.



You can also specify what kind of documents will be sent to the user when they are requested to perform a task. To de-select the automatically assigned document of "Candidate Information", select Ctrl and then click onto the document, this will remove the selection.



6. Unsure of which step type to use?

As outlined on page 6, there are several step types, so we have outlined what steps types should be used for different selection steps.

A. Shortlisting

When creating a shortlisting step, there are 2 different step types available, CV review and Panel review.

If one individual is performing the shortlisting task, **CV review** is the option to choose. The step is submitted to the Step Owner, i.e. hiring manager.

If you have a panel performing the shortlisting task, **Panel review** is the option to choose.

The *Panel Review* step type enables up to a maximum of 30 individuals (panel members) to review and submit feedback about a candidate using a defined feedback form. The panel members consist of a panel lead and panel members.

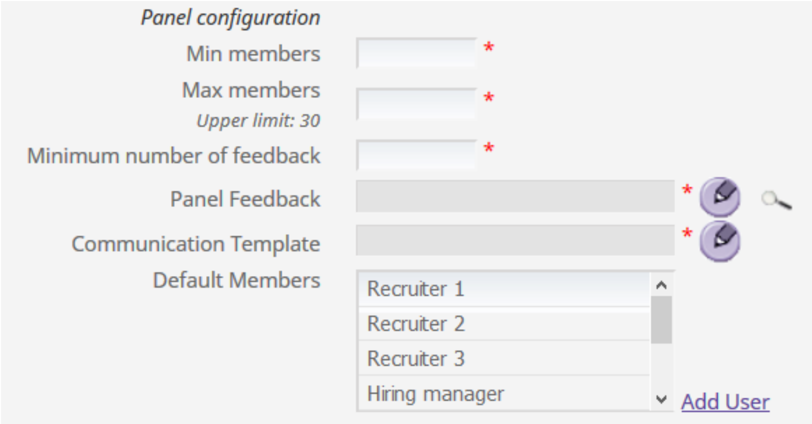
The panel lead can view the feedback and score per candidate and will receive a notification once all panel members have submitted their feedback. A non-TalentLink user can be appointed as a panel leader, however they will not be able to view who the other panel members are or the scoring details.

The panel members can be TalentLink users and non-TalentLink users. TalentLink users will receive notifications about candidates on their homepage dashboard; non-TalentLink users will receive an email containing the candidate information and a link to the feedback form.

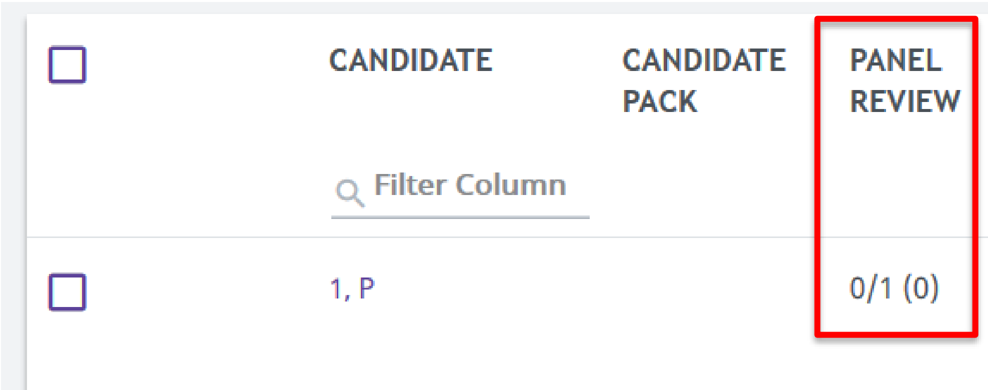
Configuration features specific to this step type are;

Panel Configuration:
Min Members
Max Members upper limit: 30
Minimum number of Feedback

Panel Feedback
Default Members



Once a *Panel Review* step has been defined, TalentLink users can select to a see a Panel Review column on the **Selection / Hiring** tab using the applications list settings cog.



B. Interviews

This step type has the Interview Scheduling feature activated and enables users to schedule meetings between candidates and interviewers, based on recruiters' availability. Please note the step type "session" also relates to an interview step, it was the old functionality used prior to the interview scheduler.

Session configuration hasn't been included in this guide, if you do require further information on this step type then please do let the WMJobs team know and we can create some guidance for you.

Configuration features specific to this step type are;

Step Owner - The Step Owner is treated as the lead interviewer. All interviewers can provide feedback, but only the lead interviewer can submit decisions and close the step.

Action Type: Action	**Use When...**
Assign Candidate to Interviewer	The interviewers are known to TalentLink, either as users or by email address.
Assign to Interviewer or Send Candidate File by Email	The interviewers are either known to TalentLink or external to TalentLink.
Send Candidate file by email	The interviewers are external to TalentLink.

Expected Outputs available
Feedback Report
Feedback Report and Decision
Feedback and Score Decision
For more information please see the Expected output section under step properties.

Meeting Place - This can be a geographical location or a phone meeting. This step can be used to book a phone interview slot with a recruiter, as well as for face to face interviews.

In the **Step Communication** section, you can define the following templates:

Invitation templates – Used to automatically invite candidates to interview.

Confirmation templates – Used to send out confirmations about the scheduled interview.

Cancellation templates - Used to send out notifications to participants about an interview being cancelled.

C. References and Additional Assessments

The *Additional Assessment* step type is used if you want to ask users to assess the candidate for a specific task other than a CV review. For example, if you want the team to review the references received from a candidate, or if you want an assessment team to review a personality questionnaire the candidate has provided. You can send any of the candidate files with the request to facilitate this.

These step types do not have the Interview Scheduling feature activated. The scenario in such cases is as follows:

The submitter of the step sends a message to the interviewer (through the Communication Centre or by email for external recruiters) containing the candidate file to review and the task of filling in the feedback report.

After reviewing the candidate file, the interviewer fills in the feedback report and the submitter of the step is notified through the Communication Centre that the step is Completed.

Configuration features specific to this step type are;
There are no specific configuration features for this step type.

D. Any steps which may require contact with the candidate, e.g. conditional offer

Step Type: Additional Information from Candidate

This step type enables recruiters to gather additional details from candidates by using a dedicated template (a Questionnaire type of template). For example, 'Ask candidate to answer more screening questions', or "a condition offer".

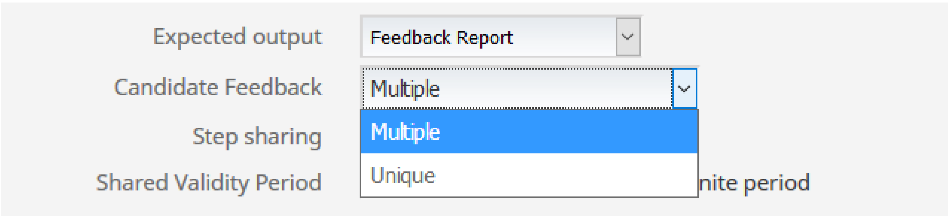
Configuration features specific to this step type are;

Action Type: Contact candidate (when using such a step type, the recruiter sends an email to the candidate)

Expected Output: Feedback Report (since the recipient of the task is the candidate, they cannot take a decision concerning the step)

Candidate feedback:

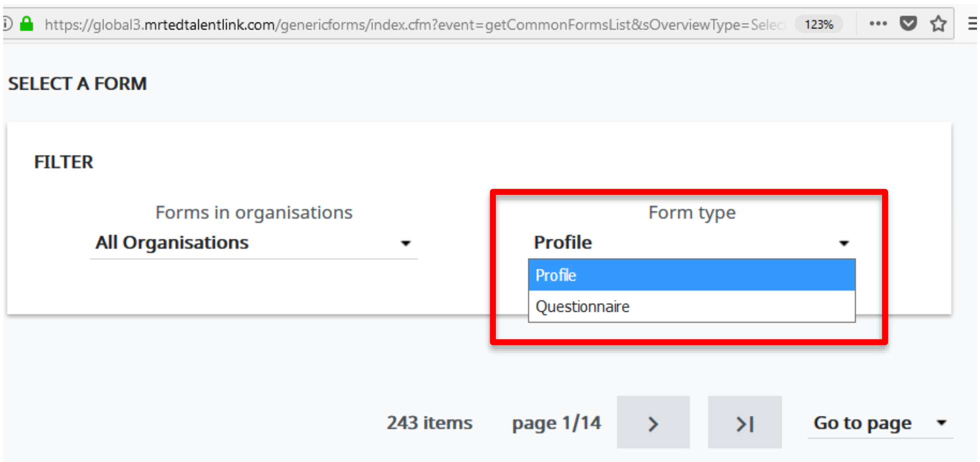
For Candidate Feedback type the options are **Multiple** or **Unique**. A **Multiple** feedback type means that the link to the template sent to the candidate is accessible even after it is filled in once. Therefore, the candidate can update the template several times. A **Unique** feedback type means that the template can only be filled in once.



The following options regarding Communication Templates and Task properties are available:
The Feedback Template for this step type is a Profile or Questionnaire and is selected from the list of available forms.

As the form type Profile is used within the application proves, we would advise to use the form type Questionnaire, as this will help you to manage your forms.

When searching for a form, it will default to a profile, however this can be easily changed.



In the **Task Properties** section, you can only define the **Task Duration.**

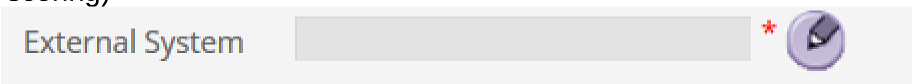
E. External System

This step type enables you to integrate third party technology into your recruitment process. For example, this could include a background check or an online testing toolkit.

Configuration features specific to this step type are;

Action Type: Send Candidate to External System

Expected Output: Feedback Report (it is not possible to trigger automatic decisions based on External system scoring)



When you click  next to **External System**, the list of all connected third-party systems is displayed. Users with the appropriate access rights can see all third party systems configured on the platform for the relevant organisation levels, selecting shared integrations or those just for individual organisation levels.

An external system must be interfaced with TalentLink. If you would like more information on External system integrations, please contact the WMJobs team.

F. Quality Survey

This step type enables you to use the email and templates features of the system to gather information in the form of surveys. For example, this could include candidate satisfaction surveys, or quality of hire surveys.

The *Quality Survey* step is very similar to the *CV Review - Additional Assessment* or *Additional information from Candidate* step types, the difference being that it is triggered automatically when certain events happen in the system, such as:

At any stage
After candidate is hired
After offer is accepted
At offer stage

This step type is available only on the last category of steps in the **Process Properties** section (**Category: Hire**).

Configuration features specific to this step type are;

Action Types:
Assign Candidate to Interviewer
Assign to Interviewer or Send Candidate File by Email
Send Candidate file by email

Contact Candidate - This is connected to Step Communication templates. The template used for the feedback is selected from the Profile and Questionnaire template types

Expected Output: Feedback Report

7. Actions which are necessary on each selection step

- Step owners must be defined (for all types of steps).

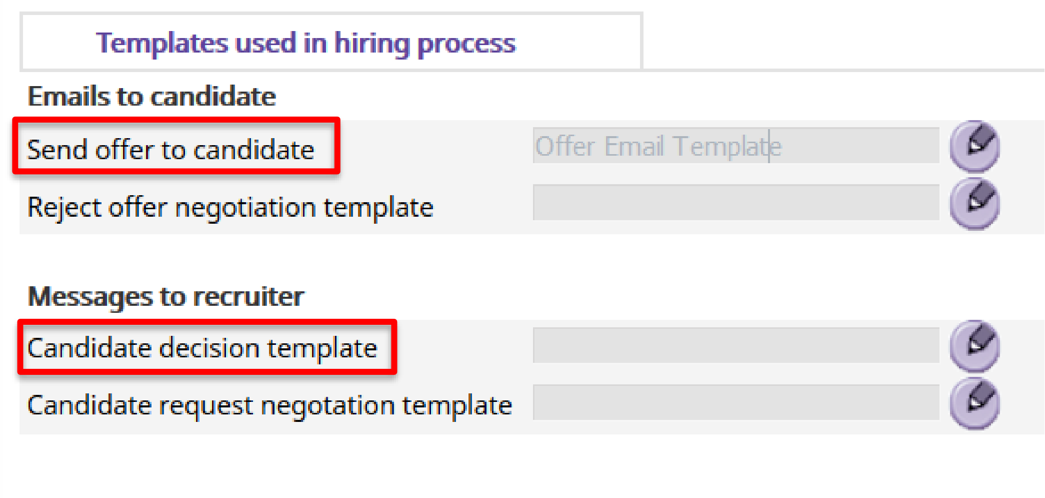
- Expected Output – Only Feedback and Decision, Feedback and Score Decision (the step starts only if the decision taken by the interviewer during the selection process is Proceed).

- Feedback report templates must be defined (this is mandatory for all step types).
- Communication templates must be defined.
- For *Additional Information from Candidate* steps - The candidate must have a valid email address.
- For *External System* steps - The candidate must have a valid email address.

8. Emails Used in the Hiring Process

At the bottom of the *Selection Process* page you can choose which email templates are used after a candidate has completed the Selection Process, and moves into the Hiring Process.

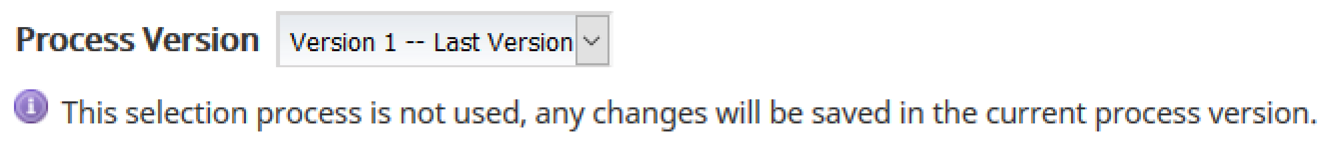
1. Click to select the required email template.



- Send offer to candidate - Used when the recruiter selects the **Send Offer** option on the *Hiring Process* page
- Reject offer negotiation template – N/A
- Candidate decision template - Used when the candidate either accepts or rejects the offer
- Candidate request negotiation template – N/A

9. Saving/Previewing the Selection Process

When you have completed your selection process, click to save it. You can also preview your process by clicking **Preview process**.



10. Selection Process Versions

You can edit an existing Selection Process. Two types of changes can be made on a Selection Process:

Changes that do not trigger the creation of a new Process version

- Changing the Step Name
- Changing the Responsible Team
- Enabling or disabling **Required before Hiring process**
- Changing the Feedback Report
- Changing the Communication Templates
- Changing the delay before setting a task to overdue

Changes that trigger the creation of a new Process version

- Changing the Step Type
- Enabling or disabling a Selection Step

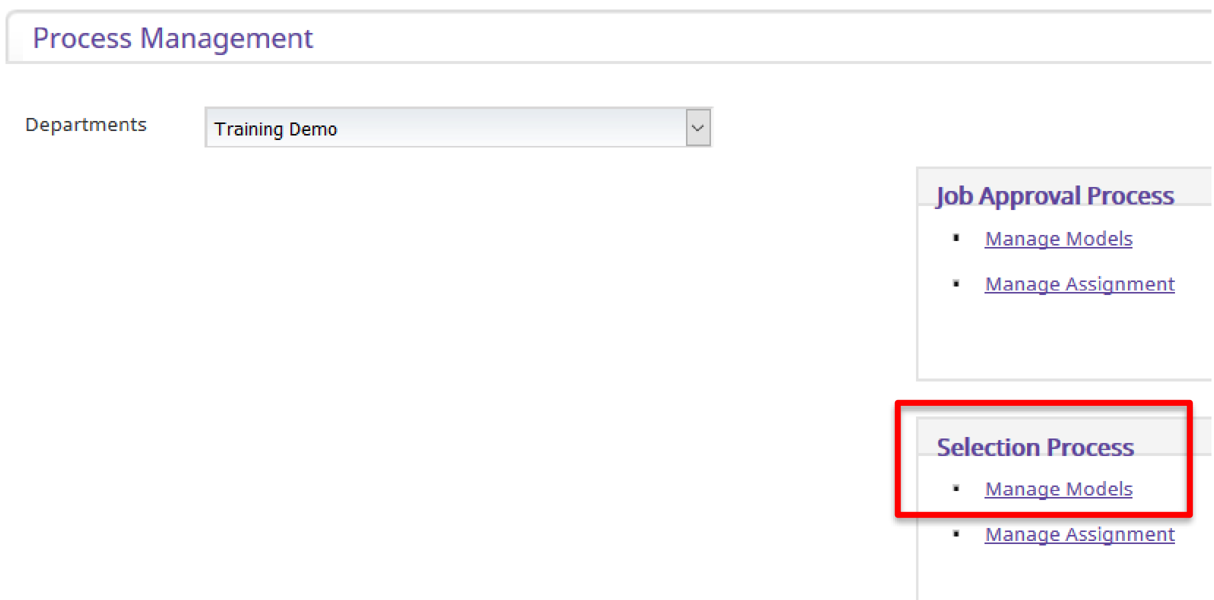
Differentiating between these changes is important since they impact the way that Selection Process versions are linked to candidates applying for jobs.

If an updated version of the Selection Process is created, this applies only to future candidates and jobs, while existing candidates linked to existing jobs continue to follow the old Selection Process.

11. Accessing Previous Versions of the Selection Process

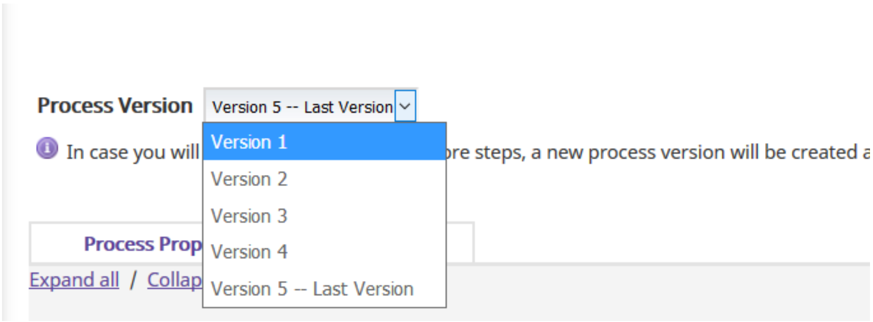
You can view old versions of a Selection Process from the *Selection Process* details page, by accessing the **Process Version** dropdown list.

1. On the *Process Management* page select **Manage Models** in the **Selection Process** section.



2. On the *Selection Process Models* page, select a process by clicking on it in the list.

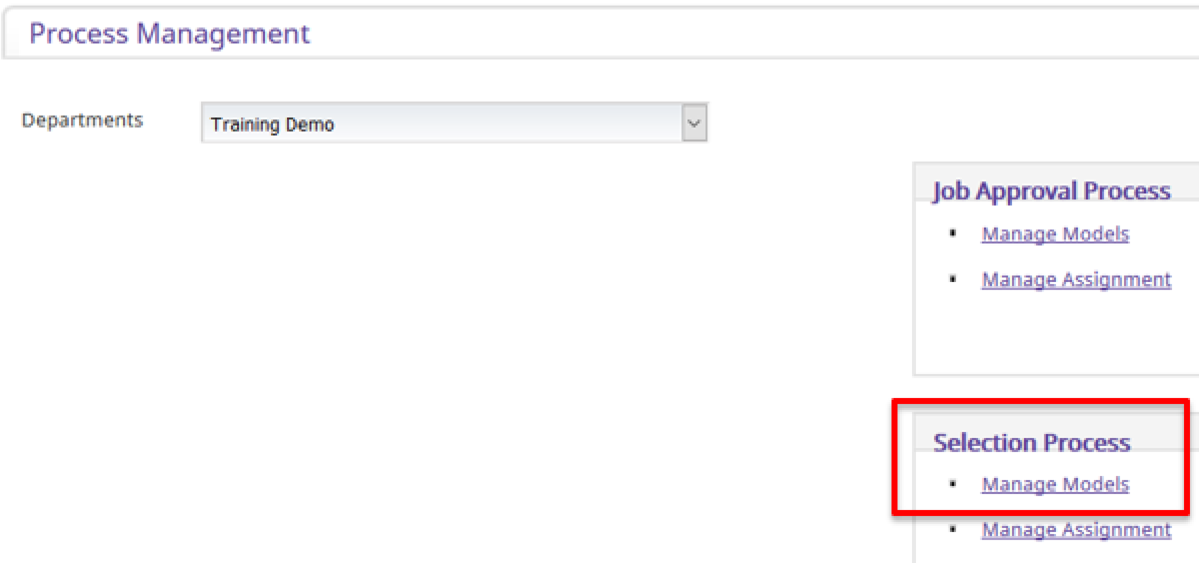
3. Select the required Process Version from the dropdown list.



The *Selection Process* page corresponding to the chosen previous version is displayed. Information on this page is read-only.

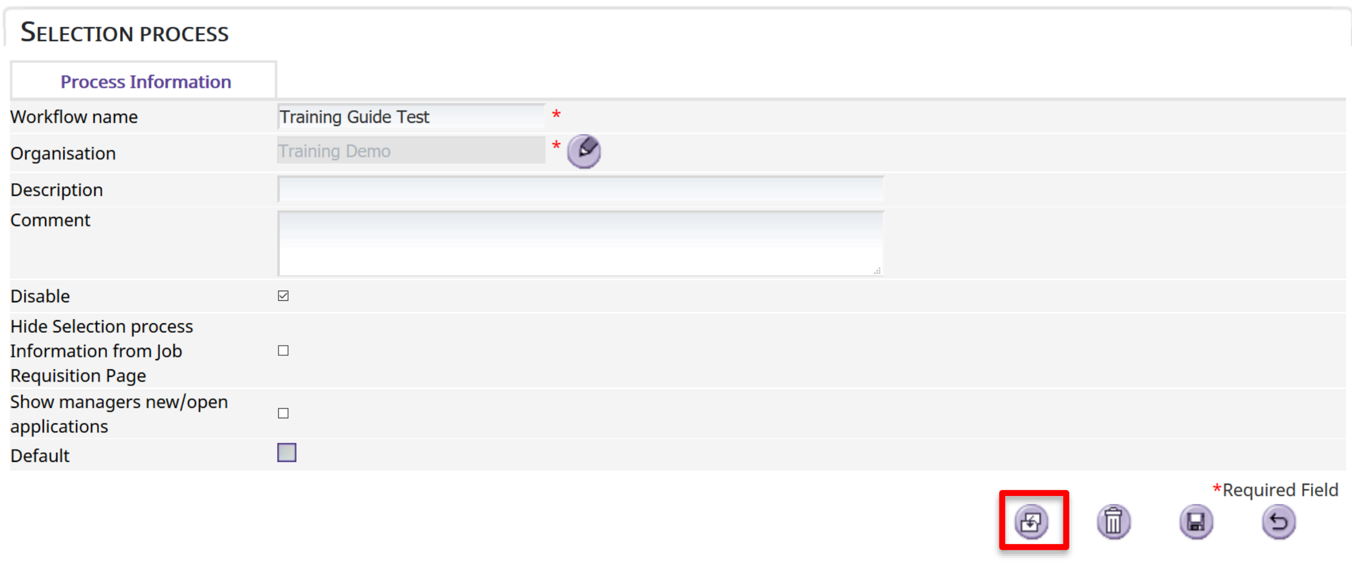
12. Copying a Selection Process

You can use existing processes as the basis for creating additional ones by copying them and editing as required. From the Process Management screen, select Manage Models from the Selection Process section.



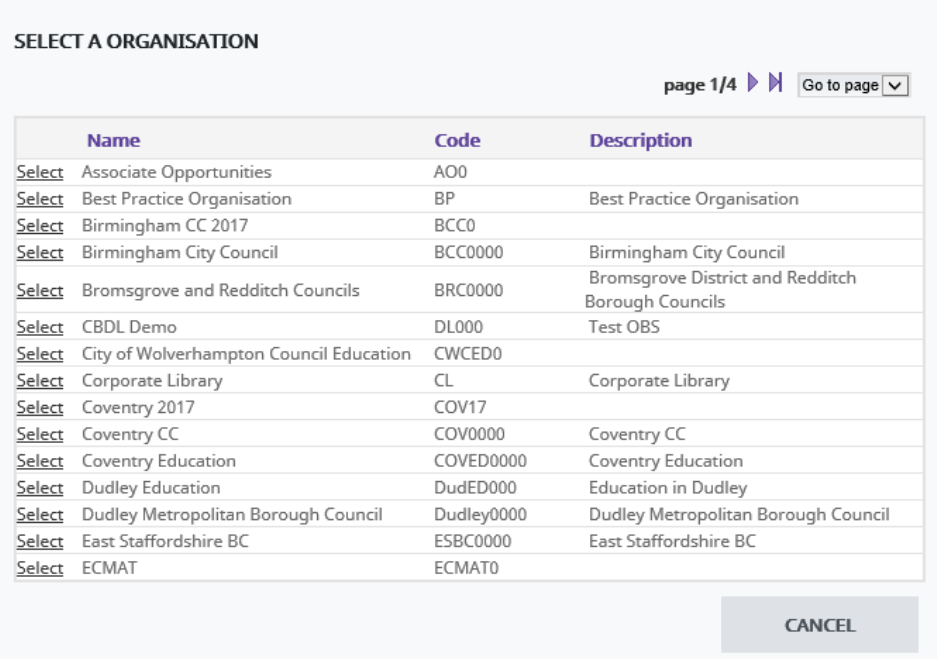
On the *Selection Process Models* page, select a process by clicking on it in the list.

Click  to copy this process.



When you copy a Selection Process any step owners and step coordinators are removed and will need to be reassigned.

Click OK when prompted, select an organiation page is displayed. Select the organisation to copy the process to


SELECT A ORGANISATION

page 1/4 Go to page

	Name	Code	Description
Select	Associate Opportunities	AO0	
Select	Best Practice Organisation	BP	Best Practice Organisation
Select	Birmingham CC 2017	BCC0	
Select	Birmingham City Council	BCC0000	Birmingham City Council
Select	Bromsgrove and Redditch Councils	BRC0000	Bromsgrove District and Redditch Borough Councils
Select	CBDL Demo	DL000	Test OBS
Select	City of Wolverhampton Council Education	CWCED0	
Select	Corporate Library	CL	Corporate Library
Select	Coventry 2017	COV17	
Select	Coventry CC	COV0000	Coventry CC
Select	Coventry Education	COVED0000	Coventry Education
Select	Dudley Education	DudED000	Education in Dudley
Select	Dudley Metropolitan Borough Council	Dudley0000	Dudley Metropolitan Borough Council
Select	East Staffordshire BC	ESBC0000	East Staffordshire BC
Select	ECMAT	ECMAT0	

CANCEL

The Selection Process page redisplays, showing you the newly copied process. From here you can change the name, reassign the step owners and step coordinators, edit the steps and attach different hiring process templates as required.

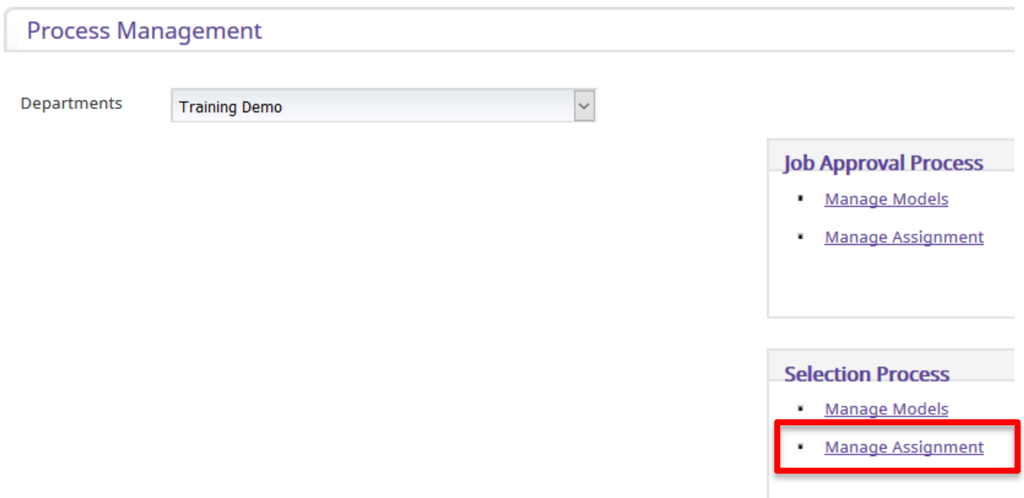
13. Assign your default Selection Processes

In this section you define which processes are activated for this organisation and assign them in accordance with your company's requirements. You can activate a default process, and, for specific cases, processes based on qualifiers.

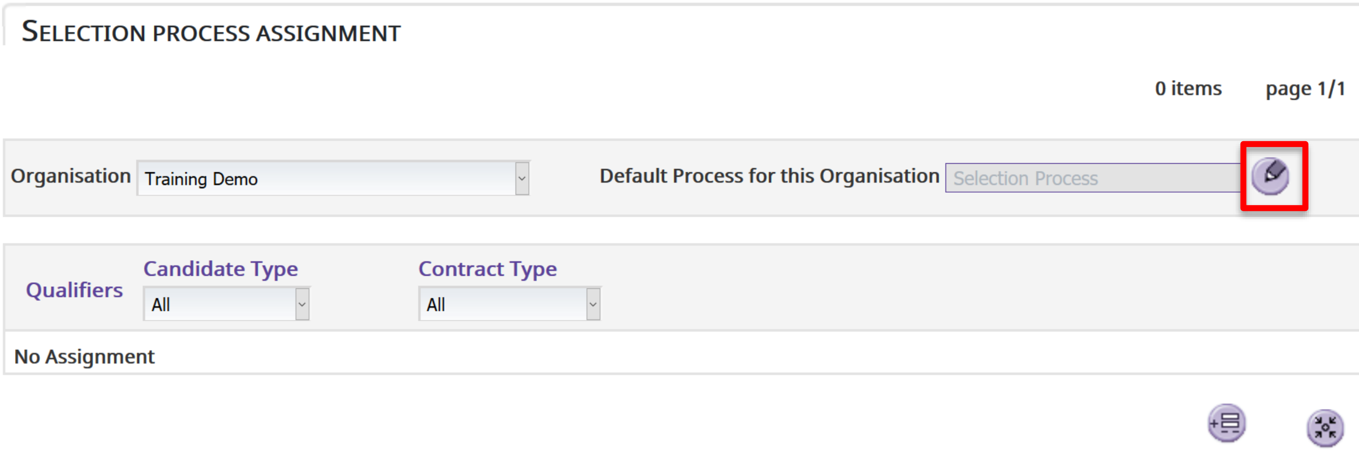
A Default Selection Process must exist before you can create jobs in any organisation.

To activate a default Selection Process for an organisation:

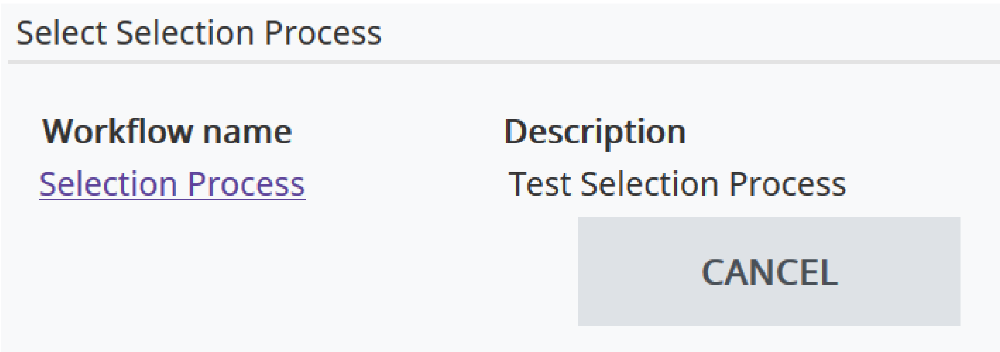
1. From the *Process Management* page in the **Selection Process** section, select **Manage Assignment**.



2. Click  next to the **Default Process for this Organisation** field.



3. From the *Select Selection Process* page, select a process by clicking on its name.



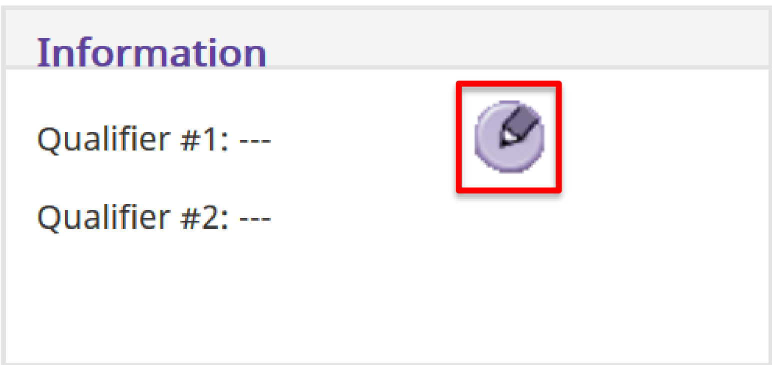
Unless there are other assignments, all candidates linked to jobs in this organisation will use the default Selection Process.

14. Have different selection processes for different job types

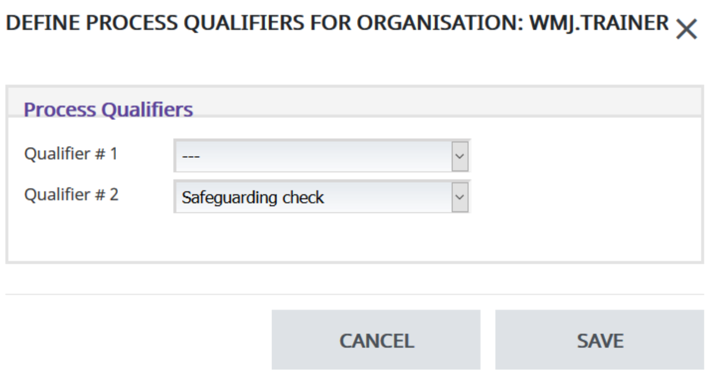
As well as activating a default process for an organization, you can also assign specific processes based on selected qualifiers.

Setting a Qualifier

1. On the *Process Management* page, click  in the **Information** section



2. Select an LOV as a Qualifier from the dropdown lists, then click **Save**. (For more information on how to create LOV's please see our Configurable Field Management Guide).



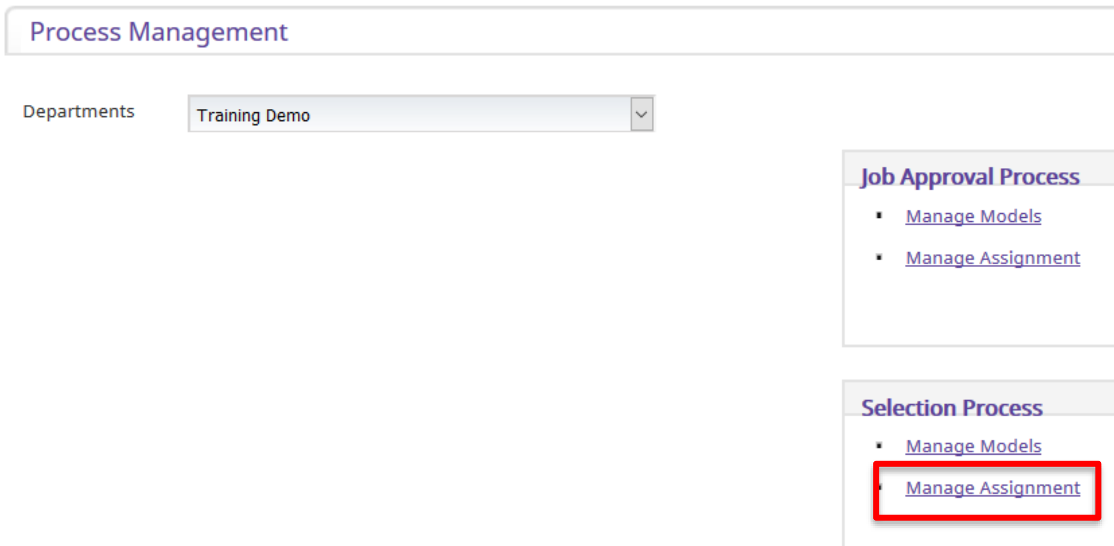
Qualifier 1 – Relates to the job approval process
Qualifier 2 - Relates to the selection process

The example we have used in this guide relates to a safeguarding check.

If a safeguarding check **isn't** required, the vacancy will follow the standard selection process.
If a safeguarding check **is** required, the vacancy will follow the safeguarding selection process.

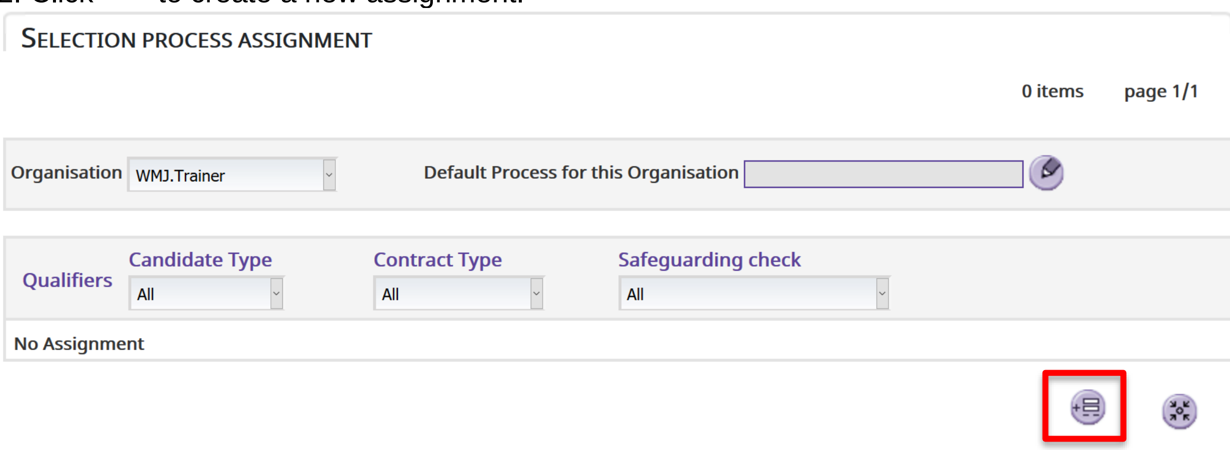
Assigning a Specific Selection process

1. Next we must link the Qualifiers to the selection Processes, on the *Process Management* page, select **Manage Assignment** from the **Selection Process** section.

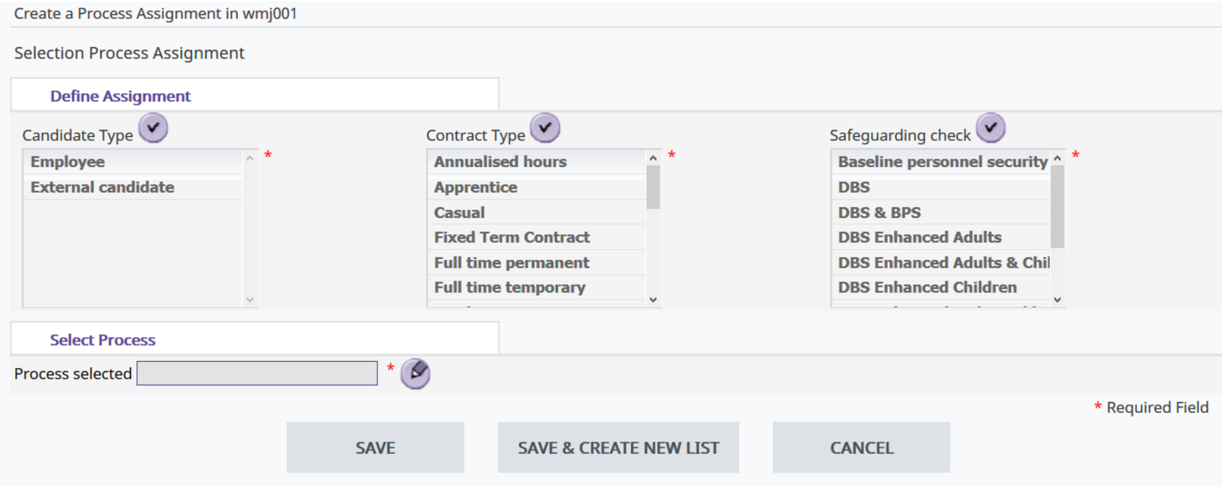


The following screen will display, here you should see the LOV selected.

2. Click to create a new assignment.



3. Select the Qualifier values to link to a process. Click to select all values in a list.



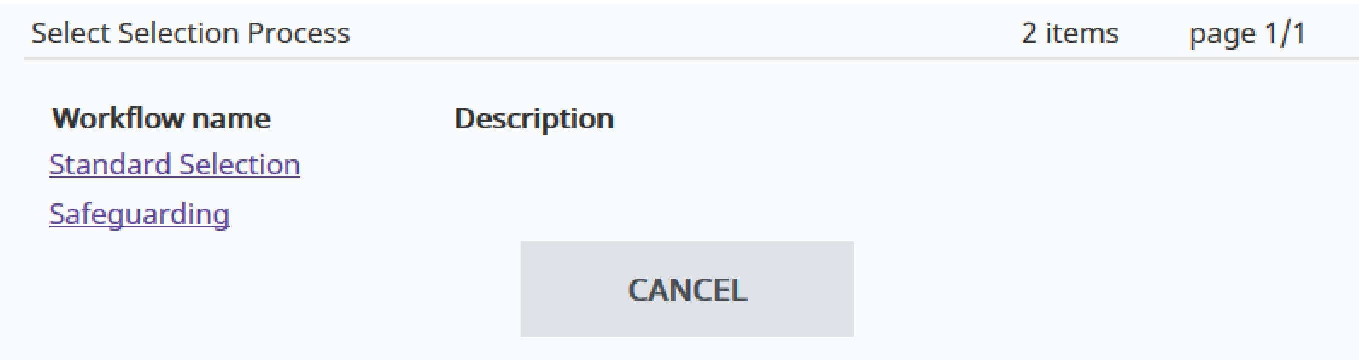
The “Candidate Type” and “Contract Type” are automatic LOV’s which act as qualifiers.

The candidate type LOV is no longer relevant, it is not possible to separate external candidates and employees with the new WMJobs front office site. Therefore, for this LOV please ensure both options are selected.

Regarding the contract type field, if the list of contract types displayed do not at all impact the qualifier LOV you have selected, then please select all the options by selecting the .

Then on your specific qualifier, in this case “safeguarding check”, select the relevant options, e.g. Here I am going to select the options which relate to my standard process, i.e. No DBS required.

4. Click to select the process



Continuing with my example, here I would select the standard selection option.

5. Click **Save & Create New List**.

This will re-open the *Create a Process Assignment* page where you can select another Qualifier value to link to the same or a different process.

Repeat steps 3-5 until each Qualifier value is linked to a process the click **Save**. Again for my example, this is where I would then go back and select all of the options which would relate to the safeguarding process.

The specific process you choose is assigned to all jobs for which recruiters select the values set here. This information is displayed on the *Selection Process Assignment* page.

You can now … Create and Manage a Selection Process!

We have outlined in this guide the essential information you need to know about Selection Processes within TalentLink, how to create new processes and manage your existing processes.

For more information around Configuration, please visit our **Topic Homepages** on our Service Centre at http://wmemployers.freshdesk.com/helpdesk

Selection Process is a module featured in our **Open House Configuration Training**. If you or any colleagues are interested in attending an open house training session, please contact the team who will be able to provide you with further information.