

INTRODUCTION TO HIRING CANDIDATES

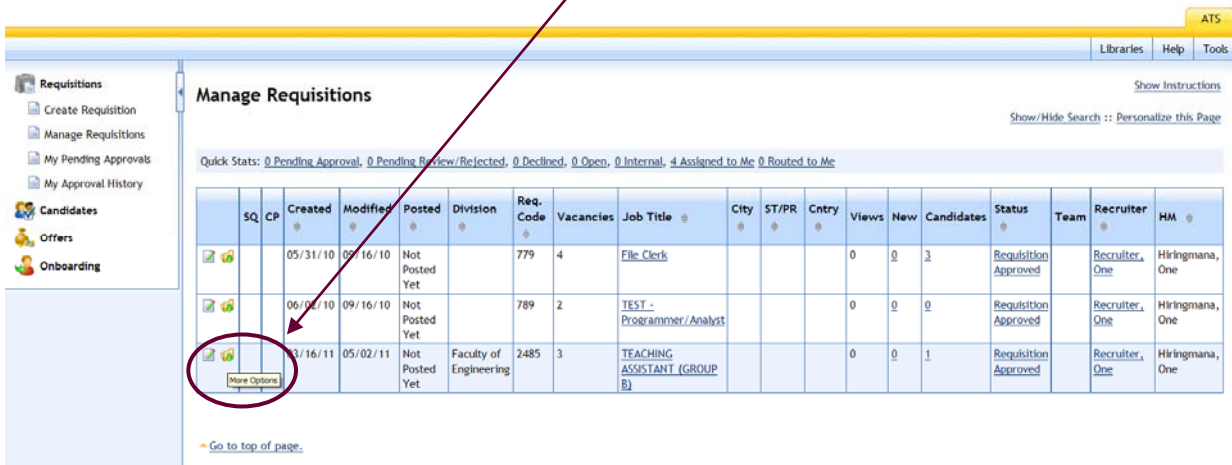
MacTRAC requires the approval of a requisition prior to initiating an offer to your candidate. Once approval is received, (which means that all approvers have approved the requisition), MacTRAC will facilitate your online creation and forwarding of the offer letter by email, the electronic acceptance of that offer by your candidate, and provide the candidate with the forms they need to complete for the first day. The documentation below describes how to complete this process.

Although your candidate doesn't require an account on the system, hiring managers are strongly encouraged to ask their candidate to create this account. This is a simple process at: http://workingatmcmaster.hua.hrsmart.com/ats/career_center.php.

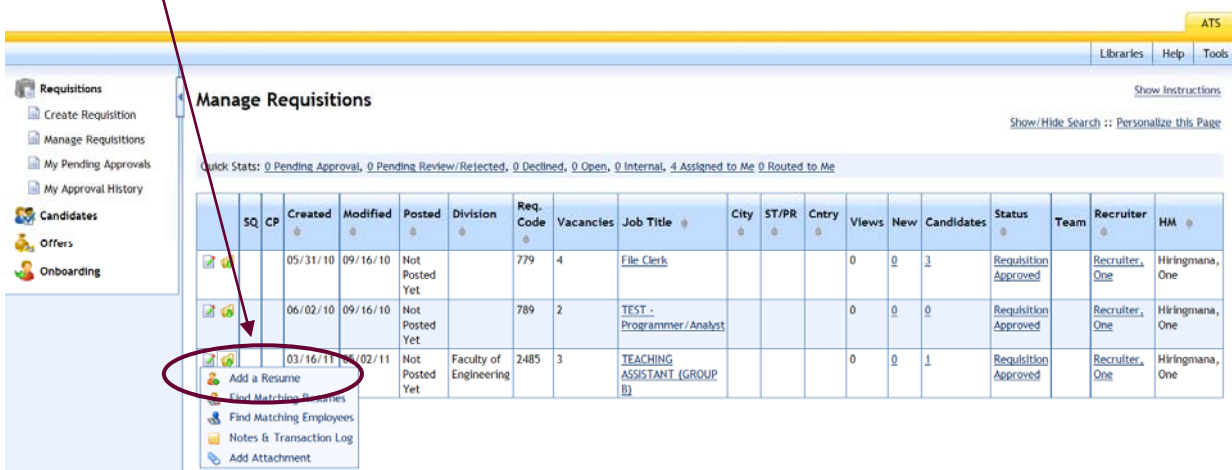
ADDING A RESUME TO A REQUISITION (ATTACHING A CANDIDATE)

Once your requisition has completed the approval process, you will need to attach your candidate(s) to the requisition.

- 1) From the Manage Requisitions screen click the "More Options" icon from the first column next to your requisition.



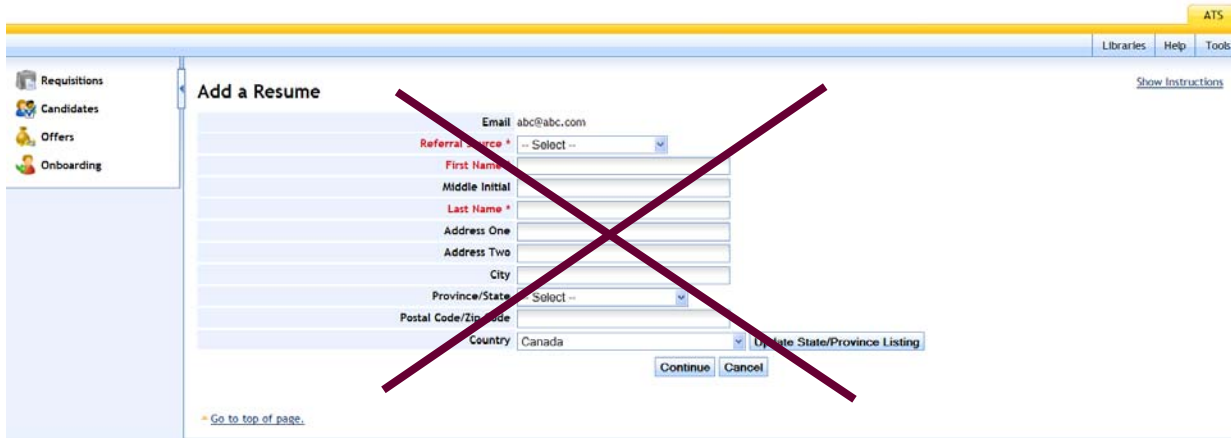
- 2) Select "Add a Resume" from the menu.



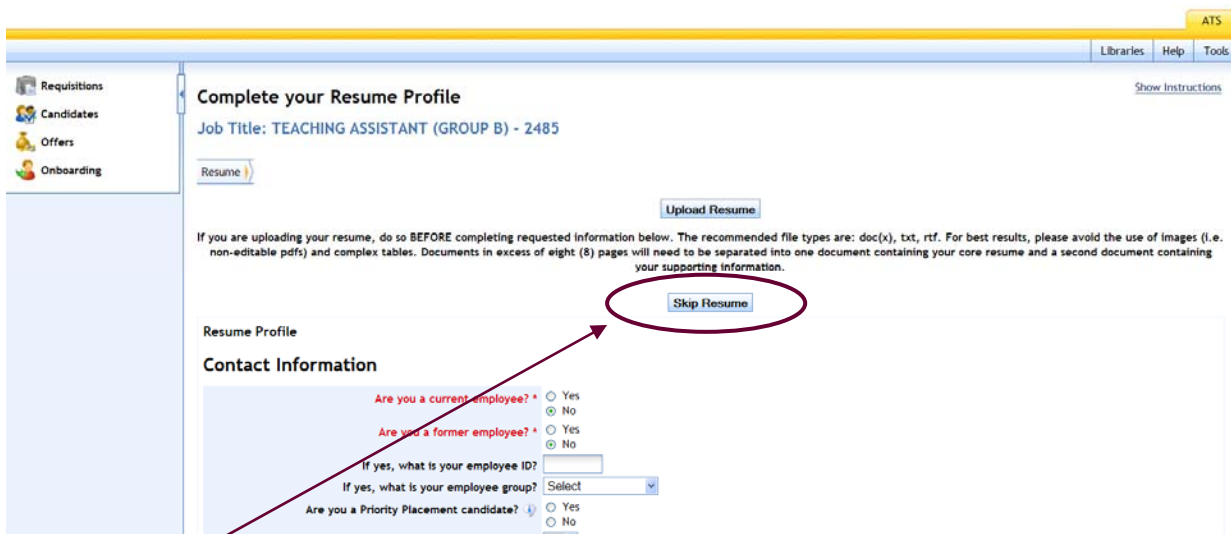
- 3) The following screen will open:



- 4) When prompted, enter the candidate’s email address *as provided by the candidate*.
- 5) The following screen will appear:



- 6) If the mandatory fields (field label in red), Referral Source, First Name, Last Name are blank, **STOP!** Click [Cancel] and leave this screen and verify the candidate’s email address and confirm that the candidate has created an account on MacTRAC.
- 7) If the candidate has created their account – as they should prior to adding them to the requisition – the candidate’s information will be pre-populated from their account as seen from the screen below:



- 8) Click [Skip Resume].
- 9) Your candidate has now been successfully attached to the Requisition and you will return to the “Manage Requisitions” screen.

EXTENDING AN OFFER LETTER

Once you have added your Candidate(s) to the requisition, you will be able to extend an offer and forward an offer letter electronically to the individual(s).

- 1) From “Manage Requisitions” find the appropriate requisition. You will now see a number that represents the candidate(s) that have been added to your requisition.

SQ	CP	Created	Modified	Posted	Division	Req. Code	Vacancies	Job Title	City	ST/PR	Entry	Views	New	Candidates	Status	Team	Recruiter	HM
		05/31/10	09/16/10	Not Posted Yet		779	4	File Clerk				0	0	3	Requisition Approved		Recruiter, One	Hiringmana, One
		06/02/10	09/16/10	Not Posted Yet		789	2	TEST - Programmer / Analyst				0	0	0	Requisition Approved		Recruiter, One	Hiringmana, One
		03/16/11	05/02/11	Not Posted Yet	Faculty of Engineering	2485	3	TEACHING ASSISTANT (GROUP B)				0	0	1	Requisition Approved		Recruiter, One	Hiringmana, One

- 2) Click on the hyperlinked number in the “Candidates” column which will take you to the “Active Candidates” screen.
- 3) From the “Active Candidates” screen for that particular requisition, find the candidate to whom you would like to extend the offer.

Status	Type	Name	Description	Scorecard	Screening	Assessment	City	ST/PR	Postal Code	Entry	Applied	Last Activity	Salary	Recruiter	Source
Route to Hiring Manager	Recruiter Unloaded	Two Candidate	N/A	0.00		0.00	Hamilton	N/A	L8K 3D5	CA	Mar 16, 2011	Mar 16, 2011	0.00	Recruiter, One	

- 4) This candidate’s status will display as “Route to Hiring Manager”. Click on this hyperlinked “Route to Hiring Manager” to be taken to the “Candidate Workbench.” From the “Candidate Workbench,” change the status of the individual to “Offer Extended.” You may also a comment if you wish.

Candidate Workbench

[Show Instructions](#)

Steinke, Tiffany

[Resume Dashboard](#) :: [Checklist](#) :: [Candidates in the Same Requisition](#)

Requisition Not Available.: Requisition Approved

Job Title	TEST - Admin Assistant - 487
Submit Date	Feb 19, 2010
Current Status	Route to Hiring Manager
Comments	
Change Status	- Move to next Status -

- Move to next Status -
- Move to previous Status -
- 1st Interview
- Declined
- Final Interview
- Hired
- Offer Accepted
- Offer Declined
- Offer Extended**
- Offer Rejected by Approver
- Pending
- Phone Screen
- Reference Check
- Removed Self from Consideration
- Resume Submitted
- Route to Hiring Manager
- Selected for Interview
- Skills Testing

Recruiting Workflow

Status	Comments	Action Taken By
Resume Submitted		Tiffany Steinke
Route to Hiring Manager		Tiffany Steinke
Selected for Interview		
Phone Screen		
1st Interview		

- 5) After selecting “Offer Extended”, click the “Change Status” button.
- 6) You will receive a “Success: Candidate Status Changed” message. To initiate the Offer Management process and to create the offer letter, scroll to the bottom of the “Candidate Workbench” and select “Initiate the Offer Management Process” under Tasks & Actions. This will take you to a screen that will allow you to populate the offer details.

Hired			
Declined			

Tasks & Actions

Task	Triggered By	When	Outcome	Action(s)
<u>Initiate the Offer Management process</u>	Offer Extended	Feb 8, 2010	sed	

7) Enter the Offer Details – these details will be used to populate the electronic offer letter sent to the successful Candidate.

[Show Instructions](#)

Offer Management
Enter Offer Details [My Pending Approvals](#) :: [View Active Offers](#) :: [Print as PDF](#)

At least one of the fields marked with a (*) is required.
NOTE: Please fill this page out carefully and accurately. Once an offer is accepted by the candidate, this page cannot be edited.

Name: Two Candidate
 Requisition: TEST - DMA IIII - 799
 Department Name (system default): HUMAN RESOURCES SERVICES
 Overwrite Department Name?
 Department Name (preferred presentation):
 Salary: * 0.00 Annually -- Or -- 20.00 Hourly -- Or -- 0.00 Special Premium Payment
 Shift Premium: 0.00
 Career Growth: * Yes No

If supervisory role, please indicate names of direct reports and employee ID#

Start Date: *

End Date (Term): *

Supervisor Name: *

Additional Information:

Offer Letter: -- Select --

[Complete](#)

At least one of the fields marked with a (*) is required.
NOTE: Please fill this page out carefully and accurately. Once an offer is accepted by the candidate, this page cannot be edited.

[Go to top of page.](#)

The following lists each field with general instructions:

Name	Pre-populated from Candidate information
Requisition	Pre-populated from Requisition selection
Department Name (system default)	Pre-populated from Associations selection (as it appears in ViP)
Overwrite Department Name	Check here if the system default name is not sufficiently reflective of your department name
Department Name (preferred presentation)	Type here your preferred presentation of your department name for the Offer Letter
Salary / Hourly / Special Premium Payment	Pre-populated from the 'Rate (\$)' entered in the Requisition
Shift Premium	This field is not usually applicable for Temp / Casual hires and is not included in the offer letter
Career Growth	This field is not applicable for Temp / Casual hires and is disabled
If supervisory role...	This field is not applicable for Temp / Casual hires and is disabled
Start Date	Select the Start Date using the Calendar icon to the right of this field
End Date (Term)	Select the End Date of the Temporary or Casual position using the Calendar icon to the right of this field
Supervisor Name	Enter the name of the individual directly responsible for this employee
Additional Information	This field is not applicable for Temp / Casual hires and is disabled

8) Select one of the following Offer Letters from the dropdown:

- Temporary Assignment Offer Letter
- Temporary Assignment Offer Letter (on behalf of)
- Casual Assignment Offer Letter
- Casual Assignment Offer Letter" (on behalf of).

Note: If you are not the supervisor (as entered on the Position Information 1 tab) for this employee, select the "On Behalf of..." letter.

Once your Candidate has accepted the offer, you will change the candidate’s status from “Offer Extended” to “Offer Accepted” then proceed to initiate the Onboarding process within the MacTRAC system and electronically send them the forms the candidate is to complete for their first day on the job.

CHANGE CANDIDATE’S STATUS FROM “OFFER EXTENDED” TO “OFFER ACCEPTED”

Once you have received an email indicating that your Candidate has accepted your offer, logon to MacTRAC and update the candidate’s status from Offer Extended to Offer Accepted.

Candidates > Active Candidates > Select Job (from drop down) > Click on the Status for the Candidate > Change status to Offer Accepted > click on Change Status.

INITIATE ONBOARDING OF CANDIDATE

Onboarding is the step in the hiring process where you forward to the candidate all the forms necessary in order for them to be set up as an employee of McMaster University.

You may initiate onboarding in one of two ways:

- a) By scrolling down on the same screen you were on to change the candidates status (the Candidate Workbench) and clicking on the hyperlink: Initiate Onboarding:

Candidate Workbench
 Candidate, Two
 Requisition Not Available.: Requisition Approved

Job Title TEST - Temp/Cas - 771
 Submit Date May 27, 2010
 Current Status Offer Accepted
 Comments
 Change Status - Move to next Status -

Recruiting Workflow

Status	When	Comments	Action Taken By
Route to Hiring Manager	May 27, 2010		Two Recruiter
Selected for Interview			
1st Interview			
Final Interview			
Offer Extended	May 27, 2010		Two Hiringmana
Offer Accepted	May 27, 2010		Two Hiringmana
Offer Declined			
Reference Check			
Skills Testing			
Hired			
Declined			
Phone Screen			

Tasks & Actions

Task	Triggered By	When	Outcome	Action(s)
Initiate Onboarding	Offer Accepted			Mark as Passed :: Mark as Incomplete

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- b) Or, you may also initiate the Onboarding process from Offers > My Offers where you can also confirm that the candidate Offer Status reflects their acceptance of your offer:

Offer Management [Show Instructions](#)

[All Offers](#) [My Pending Approvals :: View Archive](#)

My Offers

Requisition	Candidate	Offer Date	Approvers	Offer Status	Action(s)
Temp / Casual - TEST - 590	Steinke, Tiffany	Feb 8, 2010	No approvers.	Accepted by candidate.	

[Archive](#)

ONBOARDING CANDIDATE


- 1) From the Candidate Workbench, click on the hyperlink Initiate Onboarding (and proceed to step 5), or
- 2) From the “My Offers” screen (left-hand menu or through the notification email hyperlink – select Offers > My Offers) find the individual to onboard. Ensure the Offer Status shows as: Accepted by Candidate (or Accepted on Behalf of Candidate).
- 3) From the My Offers screen, in the Action(s) column at the right you may View Offer Details , View Letter , or Initiate Onboarding
- 4) Select the Initiate Onboarding icon .
- 5) You will now be taken to the “Onboarding” screen:


- 6) Enter required information not pre-populated by the system. **If the candidate does not have an Employee ID, enter TBD.**
- 7) Clicking “Continue” will take you to the Select Documents page.

- 8) On the Select Documents page, the documents required for a Temporary/Casual hire will be preselected for you. These include: Candidate Information Form, TD1, TD1ON and the Employee Deposit & Work Authorization Information Form.
- 9) Click “Continue” which will take you to the Select Letter to Send page.
- 10) On the Select Letter to Send page, click in the “radio” button to select the welcome letter that will be sent to the Candidate along with the onboarding documents. You may preview the letter by clicking on its hyperlinked title.
- 11) Click “Continue” which will take you to the New Hire Notification page, which is not used at this time. Simply click “Continue” to the Review Onboarding for: screen.
- 12) This last screen allows you to review all the information and documents that you are sending.
- 13) Click the “Initiate Onboarding” button at the bottom of the Review screen. This will send an email to the Candidate along with the documents they will need to complete (online or hard copy) as per the welcome letter.

 Selected Forms

- Candidate Information Form

 Letter Selected

- Employee Welcome Letter 




 New Hire Notifications

There is no data to display.

Initiate Onboarding

CHANGE CANDIDATE’S STATUS FROM “OFFER ACCEPTED” TO “HIRED’

You will be able to monitor your candidate’s completion of the onboarding documents. Go to Onboarding > Active Onboarding and click on the View Onboarding Details icon:

02, JS	CAS	1086	TEST - Fitness Instructor	10/07/2010	
01, JS	CAS	1214	TEST - Data Clerk	10/19/2010	
02, JS	CAS	1218	TEST - Data Clerk	10/19/2010	

Archive

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The Onboarding Details screen appears from where you may view the candidate progress “completing” the onboarding documents. (“Completing” means that they have acknowledged receipt and, hopefully, printed and signed all paper documents and completed the online information form as instructed):

Documents

Documents Sent	Routing History	Route Documents	Action(s)						
<input type="checkbox"/> Employee Deposit and Work Authorization Information Form	<table border="1"> <thead> <tr> <th>Recipient</th> <th>Date Sent</th> <th>Date Completed</th> </tr> </thead> <tbody> <tr> <td>02, JS</td> <td>Oct 19, 2010</td> <td>Complete on Behalf of Candidate</td> </tr> </tbody> </table>	Recipient	Date Sent	Date Completed	02, JS	Oct 19, 2010	Complete on Behalf of Candidate	Email <input type="text"/> And/ Or Select Recipient: 02, JS Payroll IT MacTrac Hire Notification Recruiter <input type="button" value="Send"/>	
Recipient	Date Sent	Date Completed							
02, JS	Oct 19, 2010	Complete on Behalf of Candidate							
<input type="checkbox"/> TD1 (Federal)	<table border="1"> <thead> <tr> <th>Recipient</th> <th>Date Sent</th> <th>Date Completed</th> </tr> </thead> <tbody> <tr> <td>02, JS</td> <td>Oct 19, 2010</td> <td>Complete on Behalf of Candidate</td> </tr> </tbody> </table>	Recipient	Date Sent	Date Completed	02, JS	Oct 19, 2010	Complete on Behalf of Candidate	Email <input type="text"/> And/ Or Select Recipient: 02, JS Payroll IT MacTrac Hire Notification Recruiter <input type="button" value="Send"/>	
Recipient	Date Sent	Date Completed							
02, JS	Oct 19, 2010	Complete on Behalf of Candidate							
<input type="checkbox"/> TD10N (Provincial)	<table border="1"> <thead> <tr> <th>Recipient</th> <th>Date Sent</th> <th>Date Completed</th> </tr> </thead> <tbody> <tr> <td>02, JS</td> <td>Oct 19, 2010</td> <td>Complete on Behalf of Candidate</td> </tr> </tbody> </table>	Recipient	Date Sent	Date Completed	02, JS	Oct 19, 2010	Complete on Behalf of Candidate	Email <input type="text"/> And/ Or Select Recipient: 02, JS Payroll IT MacTrac Hire Notification Recruiter <input type="button" value="Send"/>	
Recipient	Date Sent	Date Completed							
02, JS	Oct 19, 2010	Complete on Behalf of Candidate							

Dynamic Forms

Documents Sent	Routing History	Route Forms	Action(s)						
<input type="checkbox"/> Candidate Information Form	<table border="1"> <thead> <tr> <th>Recipient</th> <th>Date Sent</th> <th>Date Completed</th> </tr> </thead> <tbody> <tr> <td>02, JS</td> <td>Oct 19, 2010</td> <td>Complete on Behalf of Candidate</td> </tr> </tbody> </table>	Recipient	Date Sent	Date Completed	02, JS	Oct 19, 2010	Complete on Behalf of Candidate	Email <input type="text"/> And/ Or Select Recipient: 02, JS Payroll IT MacTrac Hire Notification Recruiter <input type="button" value="Send"/>	
Recipient	Date Sent	Date Completed							
02, JS	Oct 19, 2010	Complete on Behalf of Candidate							

[Add More Documents](#)

The hardcopy document set consists of the TD1, TD10N, and Employee Deposit & Work Authorization Information Form. The dynamic (online) form is the Candidate Information Form. This online form is for the collection of some private information which is conveyed to Human Resources electronically.

NOTE: If the candidate does not have access to email and authorizes you to act on their behalf in accepting your offer, you may click on the hyperlink(s) **Complete on Behalf of Candidate**. Be sure to use your own login and password to complete “on behalf of”.

Once your Candidate has completed all of the onboarding documentation (or you have completed the documents on the candidate’s behalf), update the candidate’s status from Offer Accepted to Hired.

Candidates > Active Candidates > Select Job (from drop down) > Click on the Status for the Candidate > Change status to Hired. Then click on the first [Hire Candidate Without a Position] button, ignoring the fields for Location and Position Code.

[Show Instructions](#)

Candidate Workbench

Candidate, Two

Requisition Not Available.: Requisition Approved

Hire Candidate

Position --Select-- Hire Candidate Hire Candidate Without Position

Create New Position

Location * -- Select --
Position Code *
Submit

Job Title Administrative Assistant - 774
Submit Date May 27, 2010
Current Status Offer Accepted
Comments
Change Status - Move to next Status -
Change Status

You have just hired the Candidate and all the required information will be available to Human Resources to onboard the candidate into the HRIS.