CougarHR
Talent Management System

Hiring Manager and HR Consultant Applicant Tracking Quick Reference Guide
For Hiring Full-time Staff

ACCESSING THE COUGAR HR SYSTEM
1. Go to http://jobs.collin.edu
2. Enter your regular Novell username and password
3. Click the **Login** button.
4. [HR] Click on this icon to access the Main Menu.

COUGAR HR ATS PROCESS/WORKFLOW

A. Hiring Manager Creates Job Requisition
B. Applicants Apply for Open Positions
C. Hiring Manager Reviews Applicants
D. Hiring Manager Conducts Interviews
E. Hiring Manager/HR Consultants Move Candidates through the Selection Process
F. Hiring Manager Recommends for Hire
G. Hiring Manager Initiates Offer/Approvals
H. Hiring Manager Closes Out Requisition

Detailed information to complete each of these steps follows.

A. HIRING MANAGER CREATES JOB REQUISITION

Creating a New Job Requisition (Job Posting)
HR➔Jobs➔Create Requisition
1. Hover over the **Jobs** menu in the main directory and then click the **Create Requisition** menu.
2. Select the appropriate **Association(s)**
3. To search for a specific job, enter the title in the **Job Title** field. Jobs that are a match will display in a list.
4. Click on the desired job title displayed in the list and click the **Continue** button.
5. Complete and/or edit the requisition form. All fields in red text are required. Click the **Next** button to move to the next step in the creation process.
6. Click **Complete Requisition** button to save and finish.
7. The system will automatically route the requisition to the appropriate approvers.

Approving/Rejecting Requisitions
HR➔User➔Approvals➔Recruiting
1. Hover over the **User** menu in the main directory and then click the **Approvals** menu.
2. Click the **Recruiting** option.
3. Click ✅ to **Approve** or ❌ to **Reject.**
4. Enter your **Comments** in the text box provided.
5. Click the **Approve** or **Reject** button under the comment box.

Once a requisition has been approved by all appropriate approvers, it will be routed to the appropriate HR Consultant with the status of **Approved to Post**. The HR Consultant will obtain a Position Number (PCN) if necessary, add screening questions, note any third party posting sources in the appropriate field on the requisition, and change the status of the requisition to **Open**.

Managing Requisitions
HR➔Jobs➔Manage Requisitions
1. Hover over the **Jobs** menu in the main directory and then click the **Manage Requisitions** menu.
2. To view the new applicants attached to a requisition, click the hyperlinked number in the **New Applicants** or **Candidates** column.
3. The **New Applicants** column shows the newest resumes/job seekers that have applied to the requisition.
4. The **Candidates** column shows the current number of active candidates.

B. APPLICANTS APPLY FOR OPEN POSITIONS
Once a requisition has been approved by all appropriate approvers and the status has been changed to **Open** by the HR Consultant, the positions will be displayed on the College's external Career Center, and Applicants can apply for the position. The link to the College's external Career Center is: http://jobs.collin.edu

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C. HIRING MANAGER REVIEWS APPLICANTS

Marking an Applicant as a Candidate for Interview
HR➔Jobs➔Manage Requisitions
1. Hover over the **Jobs** menu in the main directory and then click the **Manage Requisitions** menu.
2. Click the hyperlinked number in the **New Applicants** column to view applicants that have screened through.

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3. Mark the box next to the applicant(s) you wish to move to the next status of **Shortlist Approval Requested from HR.**
4. From the **Action** list, select the **Mark as Candidate** option and click the **Go** button.
5. The selected applicant(s) will now appear in the active **Candidate** list. This will automatically change the candidate's status to **Shortlist Approval Requested from HR** and send notice of this action to the appropriate HR Consultant for review.
6. HR Consultant reviews candidates to ensure they meet minimum job qualifications and changes their statuses to **HR Approved for Interview or Declined.**

NOTE: **Applicants' statuses may also be changed from the Workbench tab of their application profile.**

D. HIRING MANAGER CONDUCTS INTERVIEWS
1. AFTER candidates are changed to **HR Approved for Interview** by HR Consultant, contact the candidates you wish to interview to schedule interviews.
2. After interviews are complete, identify the candidate(s) you wish to recommend for hire and complete the steps below to move the candidate(s) through the selection process.

E. HIRING MANAGER/HR CONSULTANT MOVE CANDIDATES THROUGH SELECTION PROCESS

Moving a Candidate through the Selection/Non-Selection Process
HR➔People➔Candidates➔Active Candidates➔Select Job
1. Click on individual's **hyperlinked status** from anywhere within the system.
2. The **Workbench** tab of the **Resume Dashboard** will automatically display.
3. Select the next status from the **Change Status** list, selecting the appropriate option to advance the candidate to the next status. Refer to the next section below to ensure that you are selecting the steps in the appropriate order. *NOTE: The Hiring Manager MUST NOT change the status of any candidate to any of the statuses reserved for HR use only.*
4. Enter **Comments**, if applicable and click the **Submit** button.

Important Note: If a candidate's status is changed to "Declined" or "Remove from List" at any time, the hiring manager will be prompted to select a reason for rejection.

Recommending a Candidate for Hire

HR→Jobs→Manage Requisitions

1. Hover over the **Jobs** menu in the main directory and then click the **Manage Requisitions** menu.
2. Click the **hyperlinked number** in the **Candidates** column to view active candidates.
3. Click on the **hyperlinked status** of the candidate you wish to recommend for hire.
4. The **Workbench** tab of the **Resume Dashboard** will automatically display.
5. From the **Statuses** section of the Candidate's **Workbench** tab, select **Move to Next Status** from the drop down menu and click the Submit button
6. The candidate's status will automatically change to **Recommend for Hire–Check Background/References** and send notice of this action to the appropriate HR Consultant for review.
7. Once the Hiring Manager has changed the candidate's status to **Recommend for Hire - Check Background/References** Human Resources will conduct a criminal background check AND employment reference checks and enter the notes in the References section on the **Information** Tab of the candidate's application profile and change the candidate's status to **Background Check Complete**.

Reviewing References

HR→People→Candidates→Active Candidates→Select Job

Once the HR Consultant has changed the status of a candidate to **Background Check Complete**, the Hiring Manager should view the references PRIOR to changing the status of a candidate to **Initiate Offer**. To perform this action:

1. Click on an individual's **hyperlinked status** from anywhere within the system.
2. The **Workbench** tab of the **Resume Dashboard** will automatically display.
3. Click on the **Information** Tab.
4. Scroll down and click on **References** to review reference notes.

HR→People→Candidates→Active Candidates→Select Job

1. Click on individual's **hyperlinked status** from anywhere within the system.

2. The **Workbench** tab of the **Resume Dashboard** will automatically display.
3. Select **Initiate Offer/Approvals** from the drop down list.
4. Enter **recommended start date** in the **Comments** box and click **Submit**.

NOTE: Changing a candidate's status to **Initiate Offer/Approvals** will prompt HR to calculate salary, prepare an offer letter and route for approvals.

The approvers will receive an email notification that an offer is pending their approval. The email notification includes instructions on how to view the candidate's information and approve the offer.

Approving/Rejecting Offers in CougarHR

HR→User→Approvals→Recruiting

Note: Offers are created by the HR Consultant when a Hiring Manager changes candidate's status to Initiate Offer. The system sends offers through appropriate levels of approval.

1. Hover over the **User** menu in the main directory and then click the **Approvals** menu.
2. Click the **Recruiting** option.
3. Click ✅ to **Approve** or ❌ to **Reject**.
4. Enter your approval or rejection **Comments** in the text box provided.
5. Click the **Approve** or **Reject** button.

Extending the Offer

AFTER all appropriate approvers have approved the offer, the Hiring Manager will receive an email notification that the offer is pending his/her approval.

Upon receiving the email notification that the offer is pending his/her approval, the Hiring Manager may contact the candidate to extend a verbal offer and determine the official start date. **DO NOT** approve the offer in CougarHR until after you have contacted the candidate to extend the verbal offer.

After determining official start date, Hiring Manager should approve the offer via CougarHR and **enter the start date in the comments field.** Once the Hiring Manager approves the offer, the offer letter is automatically released to the candidate.

The offer letter includes instructions for the new employee to report to the HR office at 8:15 on his/her first day of employment for HR/Benefits Orientation.

After completing the HR/Benefits orientation, the employee will report to his/her respective campus for departmental orientation and training.

1. **Shortlist Approval Requested from HR** (action taken and status changed by Hiring Manager) This is completed by marking an applicant as a candidate *(see step C.1).*

2. **HR Approved for Interview** (status changed by HR after verifying candidate meets minimum job qualifications).

3. **Recommended for Hire–Check Background/References** (status changed by Hiring Manager). This will trigger a notification to HR to send the Secondary Application (Criminal Background Consent Form). After candidate completes the form, HR will run criminal history checks, determine if candidate is employable and conduct reference checks.

4. **Background Check Complete** (status changed by HR after completion of criminal background checks and reference checks).

5. **Initiate Offer/Approvals** (status changed by Hiring Manager) Hiring manager reviews reference notes (see step F) If satisfactory, Hiring Manager changes candidate's status to **Initiate Offer/Approvals** to prompt HR to prepare offer and forward it to the appropriate approvers.

6. **Offer Accepted/Hired Pending Employment Docs** (status changed by HR) Upon notification that the offer has been accepted by the candidate and the official start date, the HR Consultant will initiate the Onboarding Process and notify Help Desk of new hire.

7. **Hired Employment Process Complete** (action taken and status changed by HR Consultant).

NOTE: After recruitment process is complete, the Hiring Manager will receive a link via email requesting IT access permissions, this must be completed PRIOR to the employees first day of employment for IT and payroll set up.

Once candidate has been hired and requisition is filled, Hiring Manager should change status for all remaining applicants/candidates to **Declined**. The Hiring Manager will be prompted to select the reason for rejection for each applicant/candidate. Once this process has been completed HR will send all declined applicants/candidates the appropriate non-selection letter.