

PEOPLESOFT 9.2

User Guide: Talent Management Acquisition (TAM) Navigation

Overview

This guide is intended to:

- Define terminology related to the new user interface
- Explore the new features.
- Provide steps on how to navigate and customize CUNYfirst.

Note: CUNYfirst System Requirements

The PeopleSoft 9.2 upgrade introduces new cookies for your web browser that can affect how CUNYfirst is displayed in terms of fonts, colors or page layout.

Clearing your web browser's **cuny.edu** site cookies and restarting the web browser before logging into CUNYfirst fixes these display issues. See the following web pages for instructions on clearing the cuny.edu cookies from your web browser:

- [Clear cookies and site data in Firefox](#) – follow the instructions to “Clear cookies for any website”
- [Delete cookies in Microsoft Edge](#) – follow the instructions to “Delete cookies from a specific site”
- [Clear, enable and manage cookies in Chrome](#) – follow the instructions to “Delete cookies from a site”
- [Manage cookies and website data in Safari on Mac](#) – follow the instructions to “Remove stored cookies and data.”

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PEOPLESOFT 9.2 & CUNYfirst: TAM

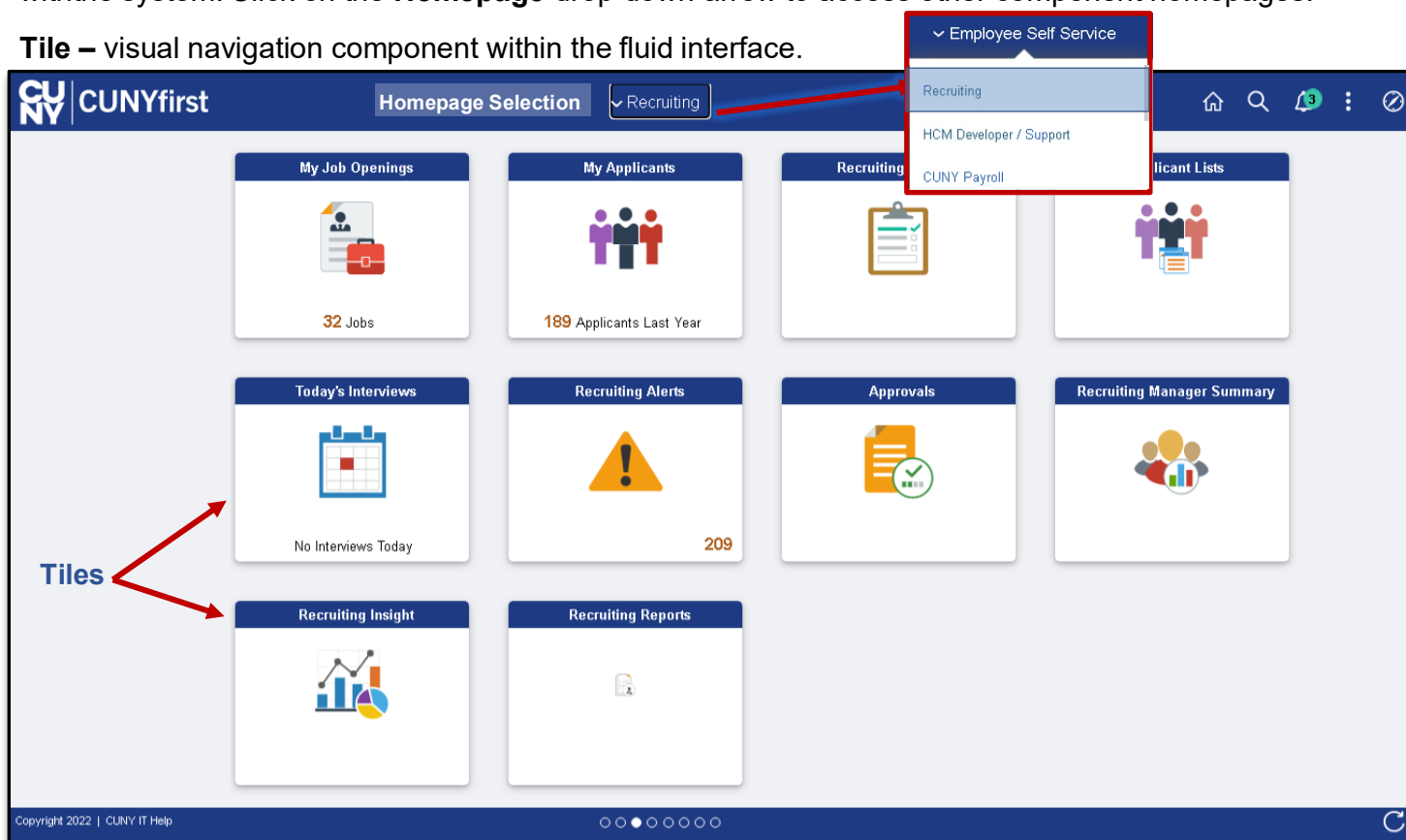
Talent Management Acquisition (TAM)

With new performance improvements comes new terminology. The definitions below are provided to assist in understanding the PeopleSoft 9.2 upgrade to CUNYfirst.

Fluid – Fluid is a new interface where tiles are added to homepages for navigational ease instead of the Classic cascading pagelets/menus. Fluid is a modern, responsive user interface that provides the flexibility to work seamlessly from desktops, tablets and phones.

Homepage - The landing page for PeopleSoft navigation. A user can have several homepages but only one default (e.g., CUNYfirst Home). Homepages can be customized to accommodate your personal interaction with the system. Click on the **Homepage** drop-down arrow to access other component homepages.

Tile – visual navigation component within the fluid interface.



Recruiting Homepage

Navigation: **Recruiting Homepage**

Talent Acquisition Management (TAM) staff perform work activities through the **Recruiter** homepage. The homepage contains the **My Job Openings**, **Recruiting Activities**, and **Approvals** tiles which provide access to commonly used recruiting activities.

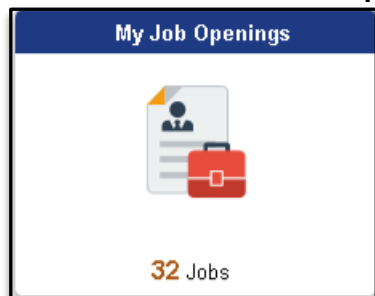
My Job Openings

Navigation: **Recruiting Homepage > My Job Opening Tile**

Navigation: **Employee Self-Service Homepage > Recruiting Related Tasks Tile (Search Committee)**

Navigation: **Manager Self-Service Homepage > Recruiting Related Tasks Tile (Search Committee)**

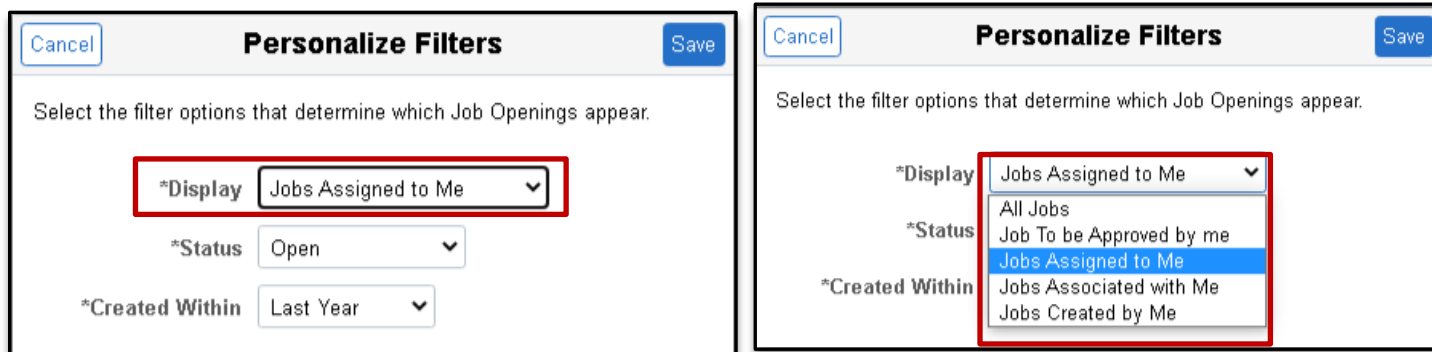
View the count of open jobs associated with the hiring manager/recruiter and access information about the job openings using the **My Job Openings** tile. Additionally, search committee staff will have access to **My Job Openings** to review applicant information and documentation via the **Recruiting Related Tasks** tile located on the **Employee** or **Manager Self-Service** homepage.



The screenshot shows the "My Job Openings" web application interface. At the top, there is a search bar with the placeholder text "Search My Job Openings" and a search button. Below the search bar, there are links for "Clear Search" and "Personalize Filters". A table lists job openings with columns for "Job Title/Job ID", "Recruiting Location", "Category", "Hiring Manager", "Days Open", "No Action Taken", and "Applicants". Annotations include a red box around the "Personalize Filters" link, a red box around the "Access Job Opening" link in the table, and a red arrow pointing to the search button.

Job Title/Job ID	Recruiting Location	Category	Hiring Manager	Days Open	No Action Taken	Applicants
Legal Coord-Paralegal	Central Office			54	0	2
Legal Coord-Paralegal	Central Office			76	0	0
Univ Associate General Counsel, Litigation, Employment & Student Affairs Unit	Central Office			157	0	12
Custodial Supervisor - School of Labor and Urban Studies (CUNY Limited Search)	Sch. of Labor & Urban Studies			157	1	16

Use the **Search My Job Openings** field to search for specific job openings. Use the **Personalize Filters** link to change the results list.



Display: Select a value to filter page data according to the job opening to be displayed.

Jobs Associated with Me are job openings that you created or where you are part of the hiring team.


Note: Select the **Jobs Associated with Me** option when reviewing job as a member of a hiring committee.

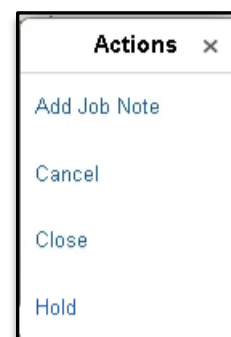
Jobs Assigned to Me (the default value) is a subset of the jobs associated to you; it includes only job openings where you are either the primary recruiter, the primary hiring manager or interview panel. The other filtering options include: **All Jobs**, **Jobs to be Approved by Me** and **Jobs Created by Me**.

Status: Select a value to filter page data based on the job openings status. The default value is **Open**.

Created Within: Select a value to filter page data based on how recently the job opening was created. Options include:

- Today
- Yesterday,
- Last 3 Days,
- Last Week,
- Last 2 Weeks (the default value),
- Last Month,
- Last Year
- View All

Select one or more job openings and click on the  menu link to perform actions on the job openings.



Sort the Job Opening list using the  icon. The **Sort** menu displays to select a different sort criteria.

Sort
Job Title
Job ID
Recruiting Location
Category
Hiring Manager
Days Open
No Action Taken
Applicants

My Job Openings displays the jobs associated to you. **Note: If no jobs display, use the personalize filter link to modify the criteria of the information displayed.**

My Job Openings

Quick Search

Search My Job Openings

Clear Search

Personalize Filters

Access Job Opening

Job Title/Job ID	Recruiting Location	Category	Hiring Manager	Days Open	No Action Taken	Applicants
Legal Coord-Paralegal 22693	Central Office			56	0	2
Univ Associate General Counsel, Litigation, Employment & Student Affairs Unit 22647	Central Office			159	0	12
Custodial Supervisor - School of Labor and Urban Studies (CUNY Limited Search) 22641	Sch. of Labor & Urban Studies			159	1	16

Select the arrow to open the **Manage Job Openings** page.

Job Opening ID 22693

Job Posting Title Legal Coord-Paralegal

Job Code

Position Number

Status 010 Open

Business Unit

Department

Job Family

Applicants

Applicant Search

Applicant Screening

Activity & Attachments

Details

Review Resume and Applicant

Download Documents

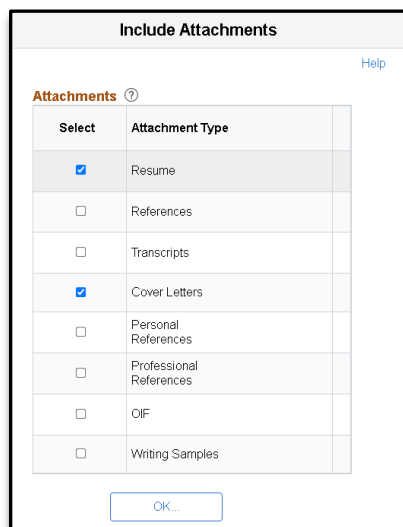
Select All link

Select	Applicant Name	Applicant ID	Type	Disposition	Applicant	Resume	Mark Reviewed	Route	Interview	Reject	Last Updated
<input checked="" type="checkbox"/>		1319716	External	Failed Pr							11/12/2021 11:35AM
<input checked="" type="checkbox"/>		682605	Employee	Offer Prcs							12/20/2021 7:53PM

Download Documents

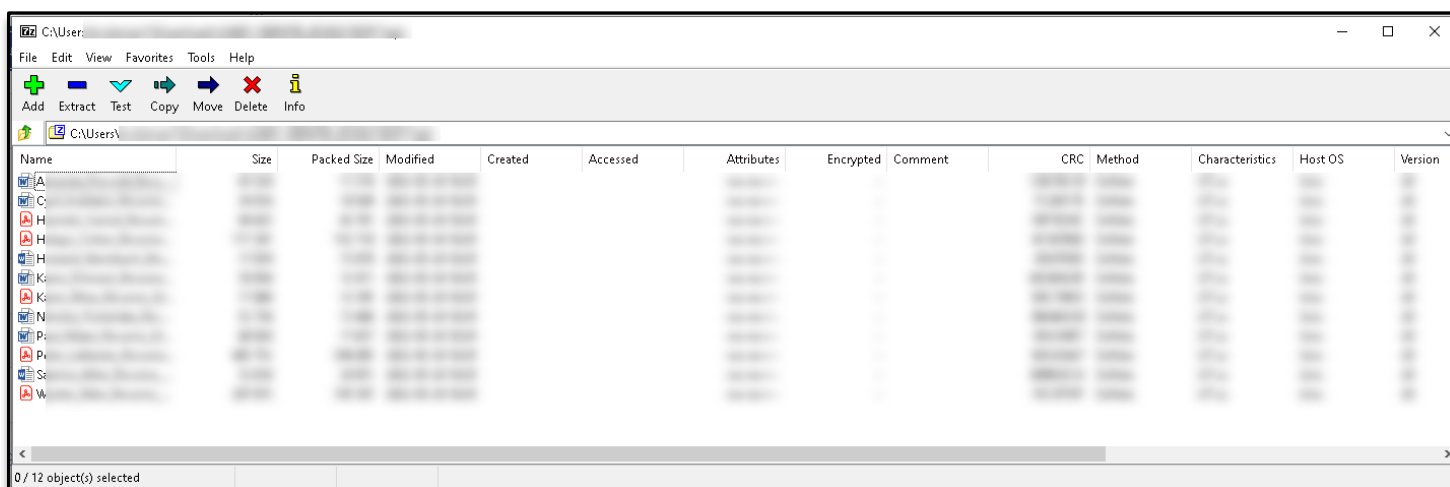
Documents may be downloaded for one or multiple candidates on the **Manage Job Opening** page. To begin, select the candidate(s), using the select check box, for documentation download. Note: Use the **Select All** link to enable check boxes. Click the **Download Documents** button.

The **Include Attachments** window displays. Select the documents to be included in the download. Click the **OK** button to begin the download process.



Note: Documents containing special characters will be omitted from the download process. An error message displays and provides the applicant information so the candidate documentation may be reviewed separately.

Click the file to review candidate information.



Note: Please manage/disable pop-up blockers to ensure information is downloaded.

Recruiting Activities

Navigation: **Recruiting Homepage > Recruiting Activities Tile**

Access the **Recruiting Activities** tile to view a navigation collection of commonly used recruiting activities.



The navigation collection of commonly used recruiting pages may include the following component pages: **My Job Openings** (security driven), **Search Job Openings**, **Create Job Opening**, Applicant Lists, **Interview Calendar** and **Saved Searches**.

Note: Use the Employee Self-Service homepage to access Recruiting Related Task (e.g., My Job Openings and Interview Calendar).

Navigation: Employee Self-Service Homepage > Recruiting Related Task Tile > My Job Openings

Navigation: Manager Self-Service Homepage > Recruiting Related Task Tile > My Job Openings

Enter the search criteria and click the **Search** button to locate an applicant.

Search Job Applicants

Navigation: **Recruiting Homepage > Recruiting Activities > Search Job Applicants**

Use the **Search Applications** page to search for applicants and applications that meets the criteria you specify. Regardless of the criteria specified, the results will only contain applicants who have applied to job openings within your Business Unit. **Note:** Applicant Status defaults to Active in the search criteria.

Enter the search criteria and click the **Search** button to locate applicant search results.

Search Job Openings

Navigation: **Recruiting Homepage > Recruiting Activities > Search Job Openings**

The **Search Job Openings** options provides search options for locating job information. A job is assigned to a user under these circumstances:

- As the primary hiring manager or primary recruiter.
- a user that created the job.
- Hiring team (recruiter, hiring manager, interviewer, or interested party).

The Hiring Manager, Recruiter, and Created By fields provide for searching for jobs based on the members of their hiring teams.

Enter the search criteria and click the **Search** button to locate job search results.

Search Job Openings

[Recruiting Home](#) | [Browse Job Openings](#) | [Create Job Opening](#) | [Search Job Postings](#)

Search Criteria ⓘ

Job Posting Title
 Job Opening ID
 Status
 Category
 Most Recent Activity
 Job Opening Type
 Hot Job
 My Association
 Hiring Manager
 Recruiter
 Created By
 Business Unit
 Department
 Position Number
 Recruitment Contact

Search Job Openings

5 Results Found

Search Results ⓘ

Select	Job Opening	Job ID	Status	Type	Category	Recruiting Location	Target Openings	Available Openings	Total Applicants	Hot Job	Created
<input type="checkbox"/>	[Blue Link]						2	2	12		07/29/2021
<input type="checkbox"/>	[Link]						1	1	57		06/14/2021
<input type="checkbox"/>	[Link]						1	1	108		04/19/2021
<input type="checkbox"/>	[Link]						1	1	54		03/26/2021
<input type="checkbox"/>	[Link]						1	1	40		03/05/2021

Select All Deselect All Group Actions

My Job Openings

Navigation: **Recruiting Homepage > My Job Openings** or **Employee Self-Service Homepage > Recruiter Related Activities > My Job Openings**

From the list, select a job opening with applicants. In the Applicants column, the number of Applicants who have applied displays. The **Manage Job Opening** page displays.

Applicants

Applicants - review applicants for a job opening and perform various applicant-related activities. This grid displays applicants who are linked to the current job opening.

The screenshot shows the 'Manage Job Opening' interface for Job Opening ID 22639. The 'Applicants' tab is active, displaying a table of applicants. The table has columns for 'All (2)', 'Applied (2)', 'Reviewed (0)', 'Screen (0)', 'Route (0)', 'Interview (0)', 'Offer (2)', 'Hire (0)', 'Hold (0)', and 'Reject (0)'. The table lists several applicants with their names, IDs, types, dispositions, and application dates. Two red boxes highlight the 'Manage Applicant Information' and 'Resume Attachment' links in the table headers.

Dispositions

Across the top of the Applicants tab, a horizontal bar provides a graphical representation of the status of the recruiting process, with labels indicating both the status name and the number of applicants currently in dispositions that belong to that phase. **Note:** for Hiring Managers/committee members, no applicants display with the Applied status even when a number displays. Applicants with this disposition are only visible to Recruiter.

All (7)	Applied (0)	Reviewed (0)	Screen (0)	Route (0)	Interview (1)	Offer (0)	Hire (0)	Hold (0)	Reject (0)
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Applicant Icons

- **Application** – review the submitted application
- **Resume** – review the attached resume
- **Route** – send the applicant’s credentials to another party for review
- **Schedule Interview** – schedule the interview
- **Reject** – updates the applicant’s status to rejected

The page is organized into five tabs or pages: Applicants, Applicant Search & Screening, Activity & Attachments, and Details.

Job Opening ID 22638

Job Posting Title Administrative Coordinator - Central Office Public...

Job Code 400578 (Admin Coord)

Status 010 Open

Business Unit COSEN (Central Office)

Job Family ADMIN (Administrative Management)

Applicants

Applicant Search

Applicant Screening

Activity & Attachments

Details

- **Applicants** – displays applicant information
- **Applicant Search** – provides for searching the job opening
- **Applicant Screening** – provides access to assigned screening levels allowing staff to process each level in its logical sequence.
- **Activity & Attachment** – provides access to activities and attachment for the job opening.
- **Details** – provide access to other job information links, specifically, Job Details, Educ & Exp, Accomplishments, Screening, Job Postings, Hiring Team & Approvals

View Applicant

Use the Applicants grid to access the applicant information. Click on the **Applicant Name** link to access the **Manage Applicant** page.

< Manage Job Opening
Manage Applicant
Home Search Notifications Settings

Manage Applicant

Save | Return | Recruiting Home | Next | Add Note | Add Application | Change Status | Forward Applicant | Link to Job | Merge Applicants Personalize

Name [Redacted]

Applicant ID [Redacted]

Applicant Type [Redacted]

Status [Redacted]

Preferred Contact [Redacted]

Phone [Redacted]

Email [Redacted]

Address [Redacted]

Applicant Activity

Notes

Applicant Data

Interested Parties

Current Status | Interview Schedule/Evaluation | Expenses | History

Applicant Activity ⓘ

Select	Job Opening	Job Opening ID	Disposition	Application	Resume	Route	Interview	Reject	
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]						▼ Other Actions
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]						▼ Other Actions
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]						▼ Other Actions

Interview Schedule/Evaluation

Interview Schedule

Use the **Create Interview** button to begin the scheduling process.

Evaluation

Use the **Create New Evaluation** button to enter evaluation results.

History

The **History** sub-tab displays the history of applicant activity including all job applications and dispositions.

Notes

Use the **Notes** tab to review notes for applicants, as well as view attachments to notes.

Manage Applicant

Save | Return | Recruiting Home | Next | Add Note | Add Application | Change Status | Forward Applicant | Link to Job | Merge Applicants | Personalize

Name: [Redacted] Preferred Contact: [Redacted]
 Applicant ID: [Redacted] Phone: [Redacted]
 Applicant Type: [Redacted] Email: [Redacted]
 Status: [Redacted] Address: [Redacted]

Applicant Activity | **Notes** | Applicant Data | Interested Parties

Notes Summary

Select	Subject	Note Date	Author
<input checked="" type="radio"/>	Following our online assessment of your application we have determined that your application for the following position does not meet the minimum requirements for acceptance and will not be reviewed further by us:	11/12/2021 11:35AM	

Note Details

Author: [Redacted] Contact Method: Outbound Email
 Date: 11/12/2021 Note Audience: Public

Job Openings

Job Opening ID	Posting Title
[Redacted]	[Redacted]

Subject
 Details
 Following our online assessment of your application we have determined that your application for the following position does not meet the minimum requirements for acceptance and will not be reviewed further by us:
 22693 - Legal Coord-Paralegal
 To access our careers site use the following link to sign in to your account:
 [Redacted]
 This message was automatically generated. Please do not respond.

Add Applicant Note

Recruiter users can manually create applicant notes and optionally add attachments to the notes. Additionally, the system automatically creates applicant notes during recruiting process such as:

- Forwarding an applicant.
- Sending correspondence.
- Generating a letter.

Applicant Data

Use the **Applicant Data** tab to view an applicant's personal information and references. This tab is organized into two pages: Personal Information, and References.

Personal Information

The screenshot shows the 'Manage Applicant' interface. At the top, there are navigation links: Save, Return, Recruiting Home, Next, Add Note, Add Application, Change Status, Forward Applicant, Link to Job, Merge Applicants, and Personalize. Below this, there are fields for Name, Applicant ID, Applicant Type, Status, Preferred Contact, Phone, Email, and Address. A tabbed interface shows 'Applicant Data' selected, with other tabs for Applicant Activity, Notes, and Interested Parties. The main content area is divided into sections: Applicant (with fields for Applicant Type and Preferred Contact), Applicant Status (with fields for Status Code, Status Reason, Status Date, and Registered Online), Name (with fields for Name Format, Name Prefix, First Name, Middle Name, Last Name, and Name Suffix), Address (with fields for Country, Address 1, Address 2, Address 3, City, State, Postal, and County), Email Addresses (a table with columns for Primary, Email Type, and Email Address), and Phone Numbers (a table with columns for Primary, Phone Type, Telephone, Extension, and Country Code). Each table has an 'Add' button below it.

The biographical information is provided by the applicant from the Candidate Gateway. A recruiter can edit the information, as needed. For a Hiring Manager, the page displays in view only mode.

References

Manage Applicant

[Save](#) | [Return](#) | [Recruiting Home](#) | [Previous](#) | [Next](#) [Personalize](#)

Name Jason Habeeb

Applicant ID 40331

Applicant Type External Applicant

Status 010 Active

Preferred Contact Not Specified

Phone 444/688-5555

Email work.bucket.1-JHABEEB@gmail.com

Address 5240 White Oak Dickinson, ND 58043

Applicant Activity
Notes
Applicant Data
Interested Parties

Personal Information
References

References

Reference Name	Title	Employer	Reference Type	Date Contacted	Contact Phone		
Mike Renoli	Director Business Affairs	HDU Associates	Professional	03/13/2020	419/220-5487		
Savita Gomathi	Manager Procurement	HDU Associates	Professional	03/13/2020	419/982-7738		

[Add Reference](#)
[Request Reference](#)

This information is provided by the Applicant during the application process. A recruiter can Add References or edit the information, if needed.

Schedule Interview

Navigation: **My Job Openings > Select Applicant > Group Actions > Recruiting Actions > Manage Interviews**

Navigation: **My Job Openings > Interview Icon**

Navigation: **My Job Openings > Applicant Name Link > Interview Schedule/Evaluation > Create Interview**

Begin the Schedule Interview process from the Manage Job Opening page by selecting an applicant and using the Group Actions – **Manage Interview** option.

The screenshot shows the 'Manage Job Opening' interface. At the top, there are navigation links like 'Recruiting Home', 'Next', 'Refresh', 'Add Note', 'No Category', and 'Print Job Opening'. Below this, there are fields for 'Job Opening ID', 'Job Posting Title', 'Job Code', 'Position Number', 'Status', 'Business Unit', 'Department', and 'Job Family'. A tabbed interface shows 'Applicants' as the active tab. Below the tabs, there are filters for 'All (2)', 'Applied (0)', 'Reviewed (0)', 'Screen (0)', 'Route (0)', 'Interview (0)', and 'Offer (1)'. A red box highlights the 'Interview' filter, with a red arrow pointing to the 'Interview' icon in the table below. The table has columns: Select, Applicant Name, Applicant ID, Type, Disposition, Application, Resume, Route, Interview, Reject, and Last Updated. The first row shows an 'External' applicant with a 'Failed Pr' disposition and an interview icon. The second row shows an 'Employee' applicant with an 'Offer Prcs' disposition and an interview icon.

The **Manage Job Openings** grid includes the Interview action icon. When selected, the **Schedule Interview** page displays. Once an interview has been scheduled this page displays the scheduled interview details and allows for managing Interview Evaluations.

Interview Schedule

The Interview Schedule page can be used to set up an interview.

Date: Enter the date on which the interview is to take place.

Start Time, End Time, and Time Zone: Enter the start and end times for the applicant's interview.

Interview Type: Select one of the interview types (e.g., In person, Phone, Video Conference).

Applicant Response: For a scheduled interview, this value will be None. Can manually set the appointment status to Accepted, Declined, None (no response), or Tentative (tentatively accepted).

Applicant Comments: Click to access the Interview Schedule Comments page where you can enter applicant-specific comments. These comments appear on the interview details page that the applicant sees in Candidate Gateway.

Applicant Availability: Click to access the Interview Schedule page, which displays all interview dates and times for the applicant for any scheduled interviews.

Initiator: Displays the name of the user who originally created the interview.

Notify Applicant: By default, this check box is initially deselected. Select this check box to have an email notification sent to the applicant when the interview is submitted.

Notify Interview Team: Select this check box to make the system select all of the Notify check boxes for individual interviewers. **Note:** If you select the **Notify Interview Team** check box and then deselect the **Notify** check box for an individual interviewer, the **Notify Interview Team** check box remains selected, but the system does not send a notification the deselected interviewer.

Interviewers: Use the Interviewers grid to identify the interviewers who will participate in the interview. This grid is populated with the interviewers from the job opening hiring team.

Interviewer ID and Interviewer Name: Displays interviewers employee IDs and name.

Date, Start Time, End Time, and Time Zone: Displays the date and time for the interview in the interviewer's own time zone.

Response: Set the appointment status to Accepted, Declined, None (no response), or Tentative (tentatively accepted). For a scheduled interview, this value will be None.

Comments (interviewer comments): Click to access the Interview Schedule Comments page and enter interviewer-specific comments. If interviewer-specific comments exist, the interviewer sees a comments icon alongside the interview on the Interview Calendar page.

Availability (interviewer availability): Click the icon to access the Interview Schedule page, which displays all interview dates and times for the interviewer for any scheduled interviews.

Notify: Select this check box to have an email notification sent to an individual interviewer when the interview is submitted, resubmitted, or cancelled.

Add Interviewer: Click this link to add another interviewer to the Interview Schedule grid.

Interview Schedule Continued

Venue: In the Venue field, select a physical location for the interview. For a scheduled interview, this value will be venue that was set up on the interview session. **Venue Email Address-** When you select a venue, its email address appears.

Response: Select the appropriate value.

Location: If there is location information in the venue definition, the system enters that location information here, replacing any existing location text. You can modify the location text, and any changes that you make are saved to the venue definition. You can also enter location text without selecting a venue.

Add/Edit Venue: Click to access the Interview Facilities Page, where you can modify venue details for the currently selected venue; or add a new venue.

Notes: Use the Notes grid to add notes related to the interview. You can also add attachments to individual notes. These notes are specific to the interview; they are not associated directly to either the job opening or the applicant. The notes are visible to an interviewer, or user who has access to the Job Opening.

Attachments: Use the Attachments grid to attach external documents, such as interview scripts, to the interview schedule. Click the Add Attachment link to add file attachments to the grid; the system prompts you to identify the file to be uploaded.

Load Job Opening Attachment and Load Job Opening Notes: Click these links to copy selected attachments and notes from the job opening to the interview. Job opening attachments and notes appear on the Manage Job Opening Page: Activity & Attachments Tab.

Letter / Consolidated Interview Letter: Individual scheduled interview letters, and consolidated interview letters (containing all scheduled interviews) can be generated by the system.

Add Interview: Click this button, which appears once per applicant (at the bottom of the Interview Schedule page) to add an additional interview section for the applicant.

View All Interviews: Click to access the Interview List Page, which displays a read-only summary of the information on the Interview Schedule page.

The screenshot shows the 'Interview Schedule' page in a web browser. At the top, there is a navigation bar with a back arrow and 'Manage Job Opening', the page title 'Interview Schedule', and utility icons for home, search, notifications, and settings. Below the navigation bar, there are links for 'New Window', 'Help', and 'Personalize Page'. The main content area is titled 'Interview Schedule' and contains several sections:

- Buttons:** 'Submit', 'Save as Draft', and 'Return' are located at the top left. A 'Personalize' link is at the top right.
- Job Opening Information:** A grid displays fields for 'Job Opening ID', 'Job Opening Status', 'Submitted', 'Business Unit', 'Job Posting Title', and 'Position Number'.
- Letter Generation Section:** A large white box contains a 'Letter' dropdown menu, a 'Date Printed' date picker, and an 'Include in Consolidated Letter' checkbox. Below these are three buttons: 'Generate Letter' (disabled), 'Email Applicant', and 'Upload Letter'.
- Consolidated Interview Letter Section:** A section titled 'Consolidated Interview Letter' with a help icon contains an 'Add Interview' button.
- Footer:** At the bottom, there are buttons for 'View All Interviews', 'Expand All', and 'Collapse All'.

Interview Evaluations

Navigation: **My Job Openings > Select Applicant > Other Actions > Recruiting Actions > Create Interview Evaluation**

Navigation: **My Job Openings > Applicant Name Link > Interview Schedule/Evaluation > Create Interview Evaluation**

After interviewing an applicant, interviewers (Search Committee members) evaluate the applicant. The Search Committee Chair will use all the evaluations to create a summary interview evaluation of the applicant in CUNYfirst. The evaluation includes fields for giving the applicant an overall rating and for recommending how to proceed in the recruiting process.

The screenshot shows the 'Interview Evaluation' form. At the top, there are navigation buttons: 'Submit', 'Save as Draft', and 'Return'. Below this, there are fields for 'Name', 'Applicant ID', 'Status', 'Job Posting Title', 'Job Opening ID', and 'Job Opening Status'. The main form is divided into several sections:

- Evaluation:** Contains 'Interview Date' (04/03/2022), 'Interview Type' (dropdown), and 'Overall Rating' (dropdown).
- Recommendation:** Contains 'Recommendation' (dropdown) and 'Comments' (text area).
- Interview Ratings:** A table-like structure with two rows. The first row is for 'Communication Skills' with an 'Interview Rating' dropdown and a 'Score' field (0). The second row is for 'Job Knowledge' with an 'Interview Rating' dropdown and a 'Score' field (0).

At the bottom, there are 'Submit', 'Save as Draft', and 'Return' buttons, along with a 'Top of Page' link.

Interview Type: Enter the interview type as entered on the Interview Schedule page.

Recommendation: Enter the evaluator's recommendation. Note: When **005 Interview** is selected, an additional Reason is required.

Comments: Enter comments.

Interview Ratings: Displays the overall rating given by the evaluator. Select a rating (Outstanding = 5, Very Good = 4, Acceptable = 3, Unsatisfactory = 1, N/A = 0). Note: Ratings must be completed for all categories for submission.

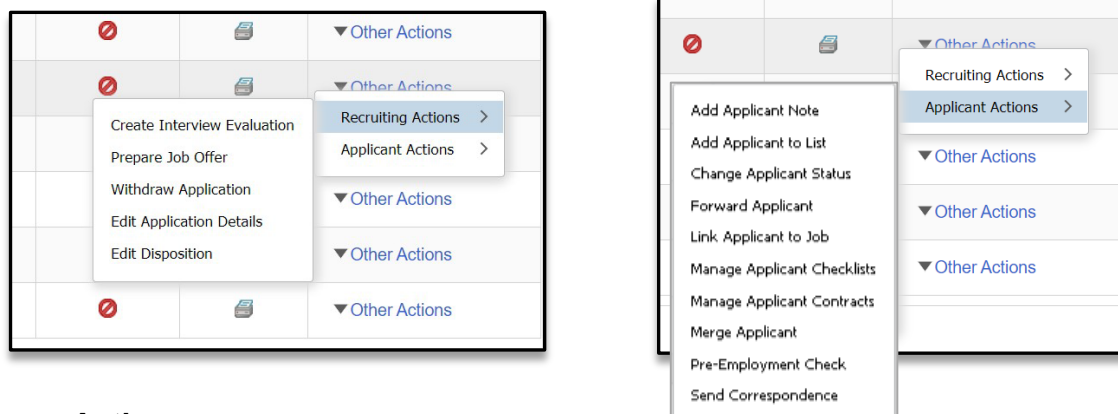
Click the **Submit** button to save the evaluation

Other Actions: Applicant Actions and Recruiting Actions

The actions performed in CUNYfirst are divided into two categories:

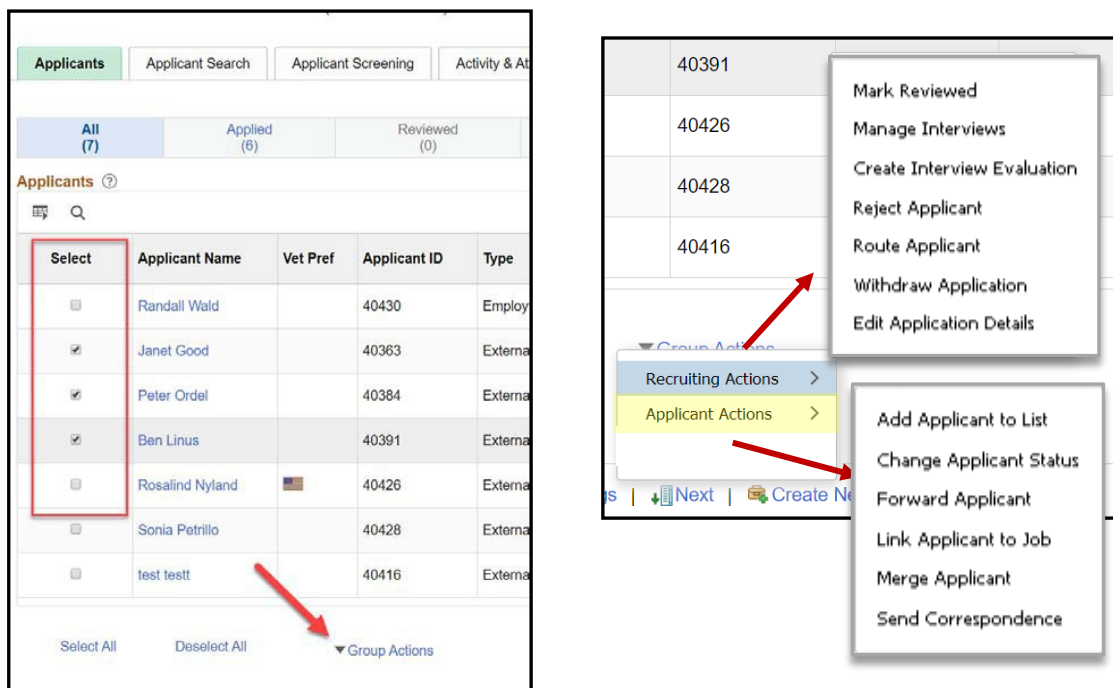
- **Applicant Actions** affect the overall applicant record instead than a specific application.
 - Examples include Forward Applicant, Send Correspondence, and Link Applicant to Job.
- **Recruiting Actions** relate to an application for a specific job opening.
 - Examples include Edit Disposition, Reject Applicant, and Prepare Job Offer.

Use these menus to perform actions on a single applicant or application.



Group Actions

This menu displays below grids and lists the actions that you can perform on multiple grid rows.



Route Applicant

Routing is the action of sending applicant information to recipients to provide input on the next step to take for the applicant. The **Route Applicant** action is available for individual applicants using the Route action icon and is also available as a group action.

Select applicants and then select **Group Actions > Recruiting Actions > Route Applicants**.

The screenshot shows the 'Manage Job Opening' interface for Job Opening ID 22638. The job title is 'Administrative Coordinator - Central Office Public...' and the status is 'Open'. The interface includes a navigation bar with options like 'Recruiting Home', 'Search Job Openings', and 'Previous/Next'. Below the navigation, there are tabs for 'Applicants', 'Applicant Search', 'Applicant Screening', 'Activity & Attachments', and 'Details'. A summary table shows counts for various stages: All (22), Applied (20), Reviewed (0), Screen (0), Route (0), Interview (0), Offer (2), Hire (0), Hold (0), and Reject (0). The main table lists individual applicants with columns for Select, Applicant Name, Applicant ID, Type, Disposition, Application, Resume, Mark Reviewed, Route, Interview, Reject, and Last Updated. The 'Route' column is highlighted with a red box, showing icons for routing actions for each applicant.

All (22)	Applied (20)	Reviewed (0)	Screen (0)	Route (0)	Interview (0)	Offer (2)	Hire (0)	Hold (0)	Reject (0)			
Applicants												
Select	Applicant Name	Applicant ID	Type	Disposition	Application	Resume	Mark Reviewed	Route	Interview	Reject	Last Updated	Other Actions
<input type="checkbox"/>	[Redacted]	[Redacted]	External	Offer Prcs	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	12/22/2021 9:21 AM	Other Actions
<input type="checkbox"/>	[Redacted]	[Redacted]	External	Offer Prcs	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	12/21/2021 8:05 PM	Other Actions
<input type="checkbox"/>	[Redacted]	[Redacted]	External	Applied	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	07/29/2021 2:58 PM	Other Actions
<input type="checkbox"/>	[Redacted]	[Redacted]	External	Applied	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	07/30/2021 4:09 PM	Other Actions
<input type="checkbox"/>	[Redacted]	[Redacted]	External	Applied	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	07/29/2021 7:37 PM	Other Actions
<input type="checkbox"/>	[Redacted]	[Redacted]	External	Applied	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	07/29/2021 4:33 PM	Other Actions
<input type="checkbox"/>	[Redacted]	[Redacted]	External	Applied	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	07/29/2021 10:13 AM	Other Actions

Route Applicant

The Route Applicant page contains the following fields:

- **Applicants to Route:** This grid lists the names and Applicant IDs of the applicants that you are routing, along with the job openings for which they are being considered.
- **Routing Status:** When initiating a routing request, choose a routing status that indicates that the routing has been sent and is in progress.
- **Reason:** Optionally select a reason for assigning the selected routing status.
- **Recipients:** Use the Recipients grid to identify the people whose feedback you are requesting.
- **Routing Date:** Displays the date that the routing was sent to this recipient. The default value is the current date.
- **Name:** Enter the name of the person to whom you are routing the applicant.
- **Response Due Date:** Enter a date by which the recipient should respond with a recommendation regarding the applicant.
- **Add Recipient:** Click to add another recipient to the routing.
- **Add Hiring Team:** Click the button to add all of the hiring team members as routing recipients.
- **Comments:** Enter comments to be included in the routing request email notification.

- **Consolidate all applicants in one email:** This check box is visible only if the routing includes multiple applicants. Select this check box to send a single email to each recipient. The email lists all of the applicants who are being routed. If the check box is not selected, the recipient receives a separate email notification for each applicant in the routing.
- **Include Attachments:** Click to access the **Include Attachments** page, where you choose which applicant attachment types to associated with the routing.
- **Preview Notification:** Click to access the Preview Notification page, where you can preview the email notification that will be sent to the recipient.
- **Notify me when a Recipient responds:** Select this check box if you want to receive a notification when recipients submit their responses using the self-service routing response page.

Click on the **Include Attachments** button to select attachments.

Include Attachments

Attachments ?

Select	Attachment Type
<input checked="" type="checkbox"/>	Resume
<input type="checkbox"/>	References
<input type="checkbox"/>	Transcripts
<input checked="" type="checkbox"/>	Cover Letters
<input type="checkbox"/>	Personal References
<input type="checkbox"/>	Professional References
<input type="checkbox"/>	OIF
<input type="checkbox"/>	Writing Samples

Send via Email

Click the **OK** button to proceed.

Click the **Submit** to save the route request.

Manage Job Opening | Route Applicant

Routing Details ⓘ

*Routing Status: 010 Route | Reason: Interview Request

Recipients ⓘ

*Routing Date	*Name	Assignment	Response Due Date	

Notification ⓘ

Comments:

Notify me when a Recipient responds

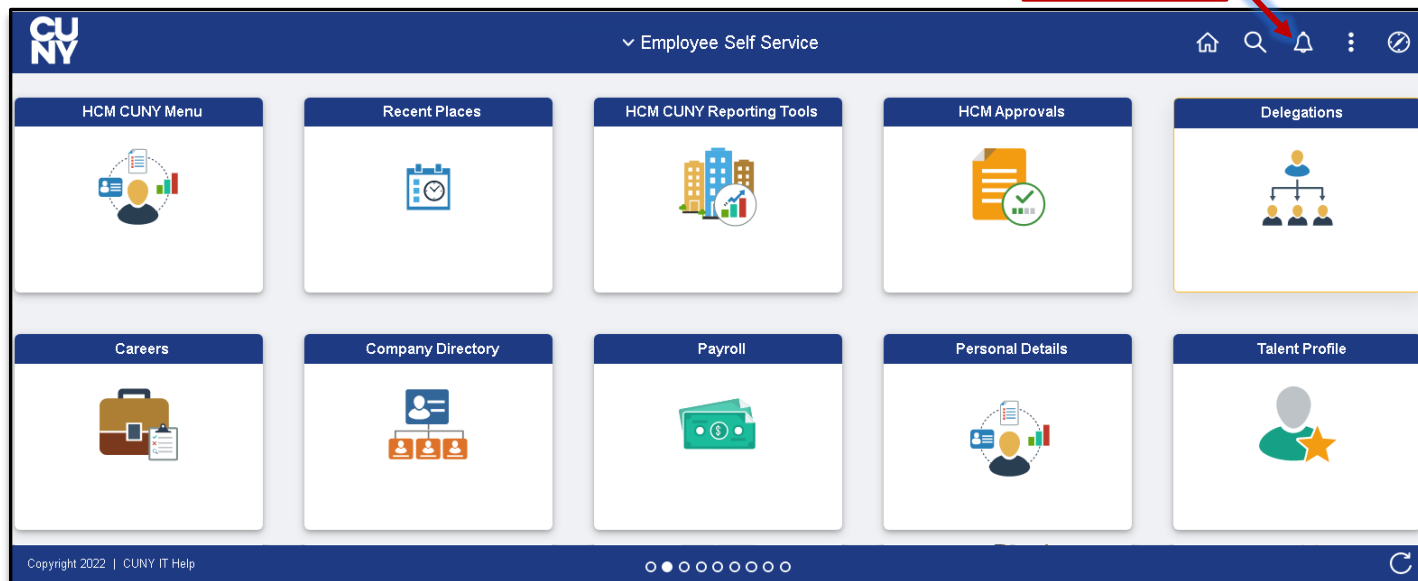
| [Return](#) Top of Page

HCM Approvals

Navigation: **Employee Self-Service Homepage > HCM Approvals Tile**

The **Approvals** window provides centralized access to approvals. Additionally, alerts will be sent to the **Notifications** page (Bell icon) and via email.

Notifications



Alternatively, navigation from alerts displays specific approvals requiring action. Selecting the link navigates directly to the approval requiring attention.





Click the **HCM Approvals** tile to review approvals across transaction types. Click a specific transaction requiring approval.

On the pending Approval page, review approvals across transaction types. Click a specific transaction requiring approval.

Transaction Type	Effective Date	Status
Name Change	Effective 09/27/2021	Routed 09/27/2021
Name Change	Effective 09/27/2021	Routed 09/27/2021
Person Profile	Profile Type: Person Degrees(1)	Routed 09/27/2021
Person Profile	Profile Type: Person Degrees(2)	Routed 09/27/2021

Review the pending approval.

Approvals

Content Type	Content Item	Instance Qualifier (2)	Disposition
Degrees	Certificate		Add
Degrees	Master of Education	Major Code Educational Leadership	Add

Approvals: Comments & Approval Chain

The approver may input comments. These comments are date and time stamped. Comments are visible to all users in the workflow process. Clicking the **Approval Chain**, displays a list of users within the approval process. The approver can view and access any attachments provided by the submitter. **Note:** Upon approval, the approval transaction is removed from the **Pending Approvals** page.

