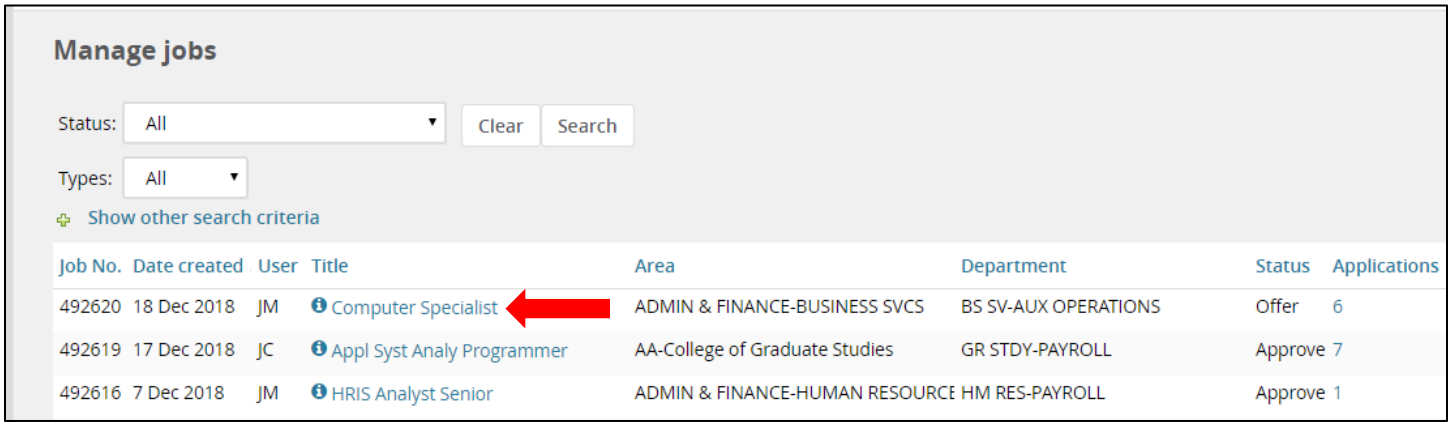
MANAGE APPLICATONS

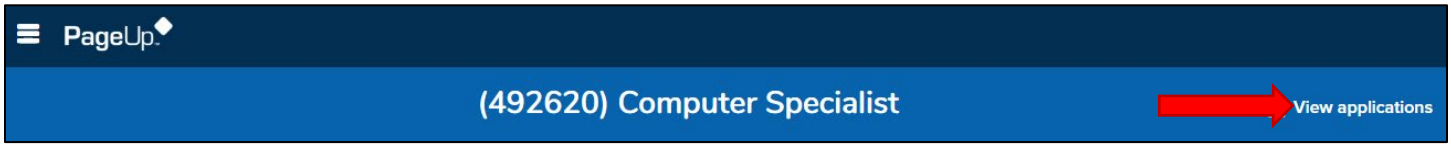
Manage Applications

There are several ways to view and manage applicants for any job posting:

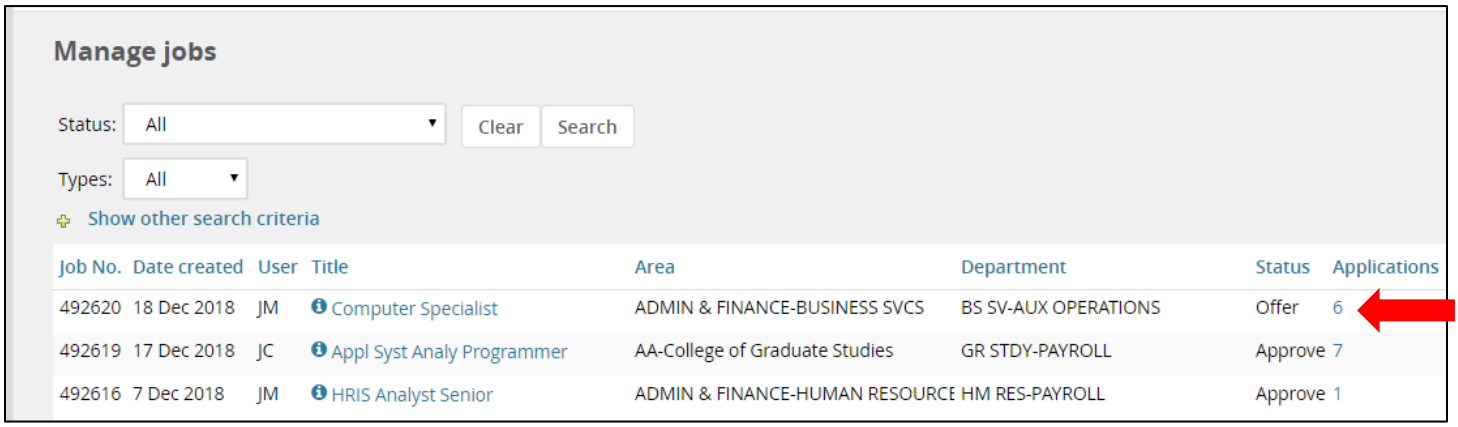
1. On the *My Dashboard*, click on ***Jobs*** located on the blue toolbar, this will take you to the *Manage Jobs* Screen.

   a. From the *Manage Jobs* screen, **click on the job title**, this will take you to the *job card*, click ***View Applications*** on the top of the screen.

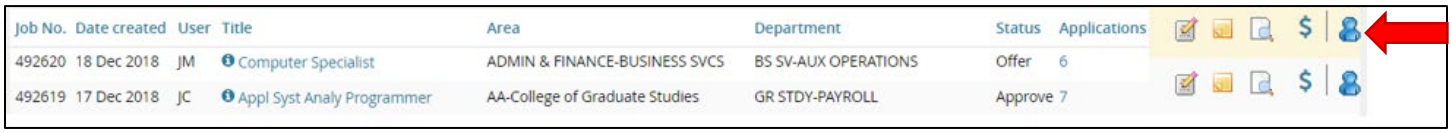




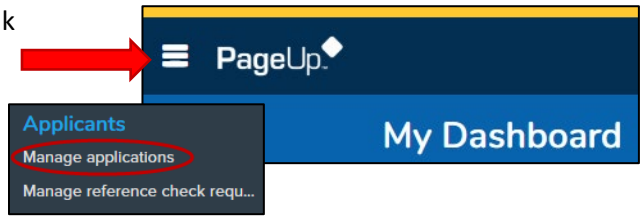
   b. From the *Manage Jobs* screen, **click the number** listed in the *Applications* column.



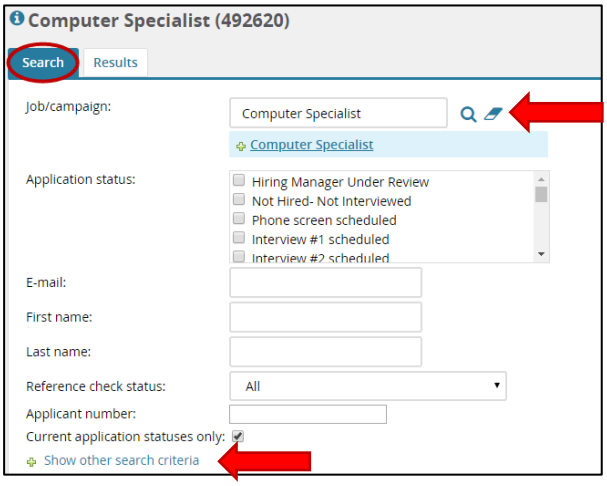
c. From the *Manage Jobs* screen, click the ***Applications* icon (blue person)** located on the far right.



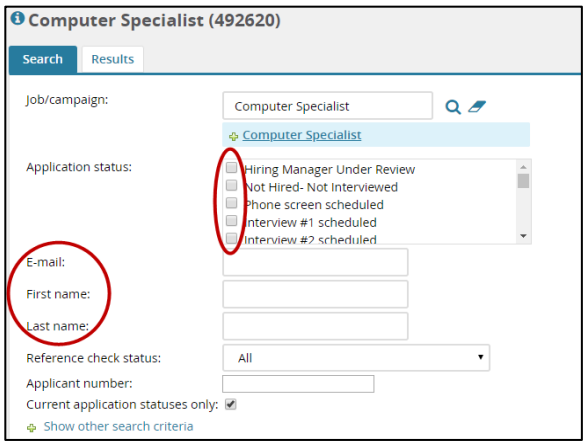
1. From the *Main Menu*, click the ***Manage Applications*** link



2. Once on the *Manage Applications* screen, use the ***Search*** tab to identify the posting.
3. You can search for the position via the **lookup icon**, then search using the **job posting number** or **job title**.
4. To view the list of **active** applicants only for the identified posting, **check the box** next to *Current application statuses only.*



5. You can also **select the desired *Application status***, or **search** by **applicant email, applicant name** or **applicant number.**



6. Click ***Search.***

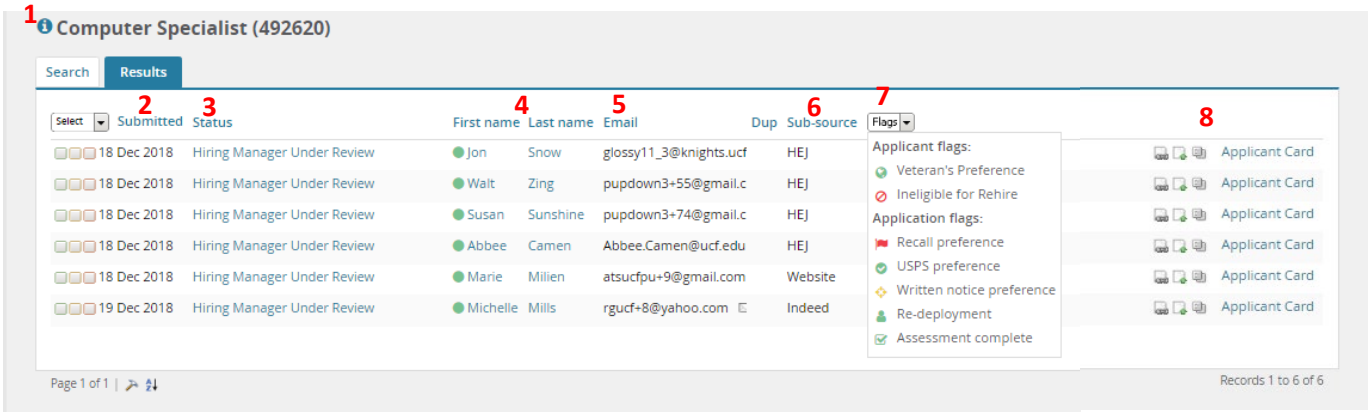
The *Results* tab displays the selected criteria along with other criteria such as:

1. Job Title and Job Number
2. Submitted Date
3. Status of each applicant (click to change the application status)
4. Candidate Name (Click to open Applicant Card)
5. Candidate Email
6. Sub source – If applicant found position via secondary job source
7. Applicant Flag – for USPS preference such as Veteran, USPS employee, etc.

Flag no.	Name	Flag
1:	Veteran's Preference	
2:	Ineligible for Rehire	

Flag no.	Name	Flag
1:	Recall preference	
2:	USPS preference	
3:	Written notice preference	

8. Additionally, there are four buttons displayed on the far right of the screen. These four buttons allow you to do the following:
   a. Click the ***View Resume*** button to view the resume/CV in a new window.
   b. Click the ***Download Resume*** button to download and save to the computer.
   c. Click the ***View Applications and Forms*** button to view application and other documents in a new window.
   d. Click the ***Applicant Card*** link to open the *Applicant Card*.



Applicant Card

The *Applicant Card* displays a full history of the applicant, including the following information (see full screenshot below).

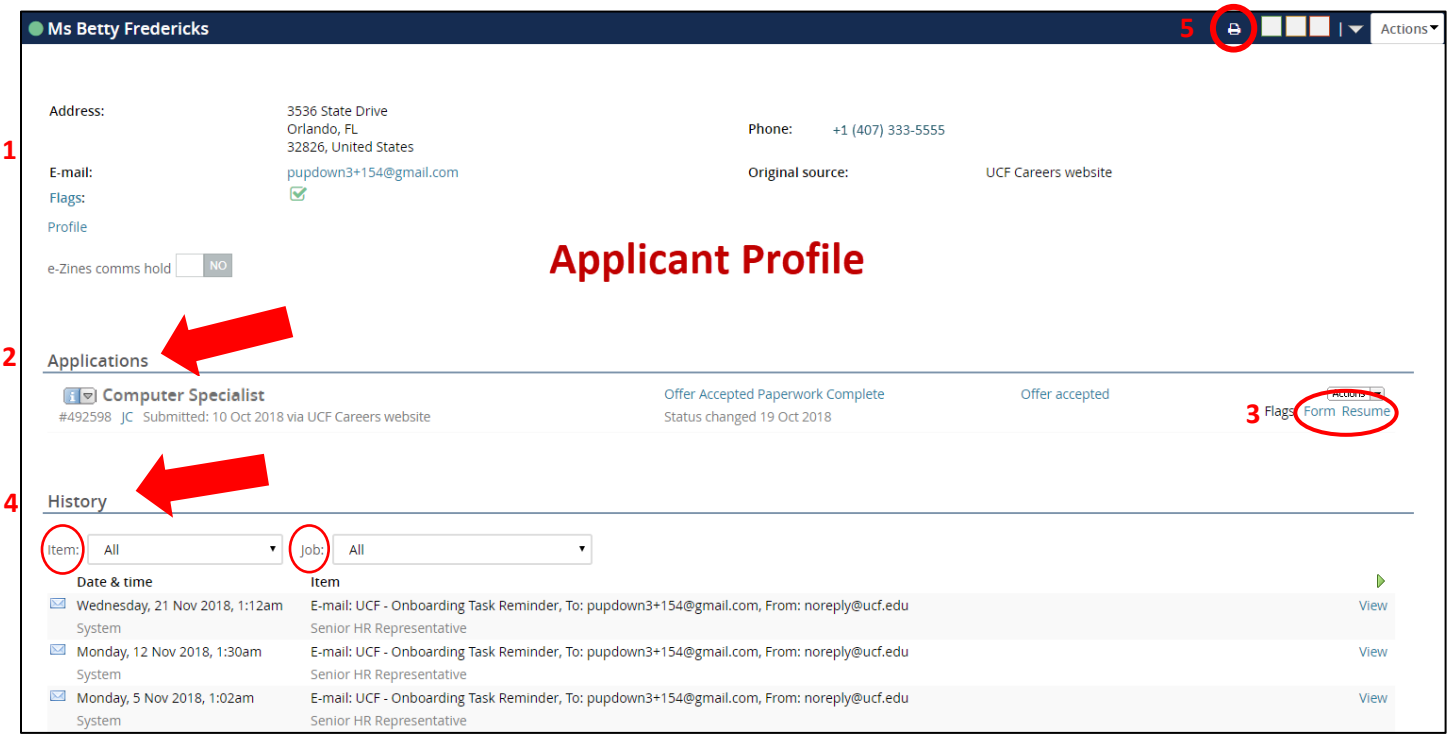
1. Applicant Profile
2. Applications completed
3. Under the *Applications* heading, click ***Form*** and/or ***Resume*** to view the applicants' answers and resume/CV information.
4. History

   Note: Filter History by selecting criteria from the *Item* and *Job* drop-down menus. The filter is automatically applied when selected and the information below is updated. The *History* section can show users important information about the applicant and actions taken during the process.

   Examples of Items:

   - *Notes*:
     - Status changes and who changed the status.
     - The reason the applicant provided when declining an event booking or offer.
   - *Bookings*: Details of event bookings
   - *Communications*: Emails that have been sent to the applicant
   - *Documents*: Documents associated with the application (i.e., Resume/CV, reference letters, etc.)

5. Click the ***Print*** button in the top right hand corner to print the application.



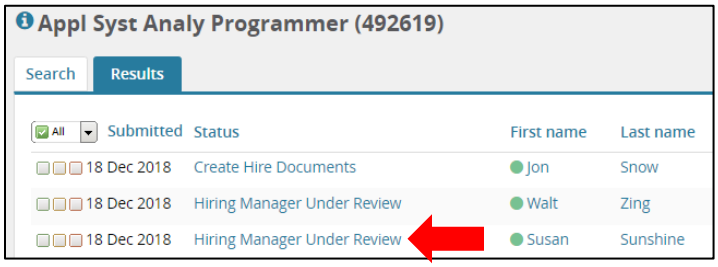
Change Applicant Statuses

Application statuses can be changed individually or using bulk actions. Do not use bulk actions for interviews or creating documents.

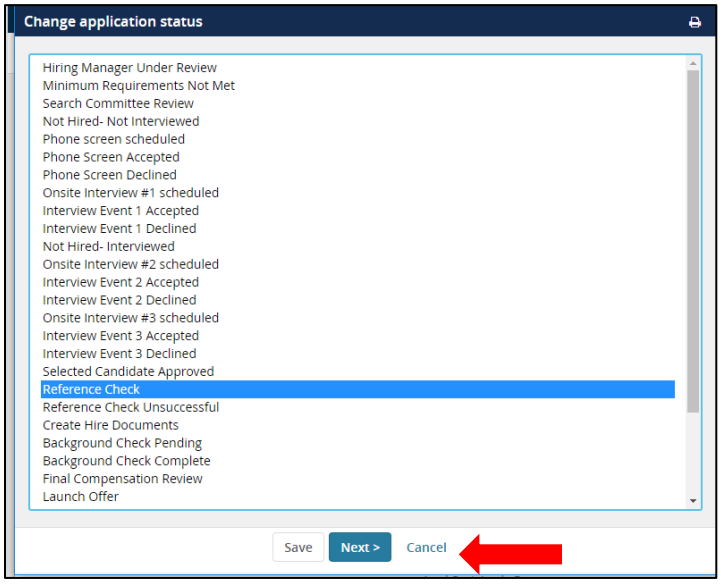
Certain applicant statuses will send an email notification to the applicant through the Talent Management system. Most emails can be edited before sending.

Changing an applicant status individually

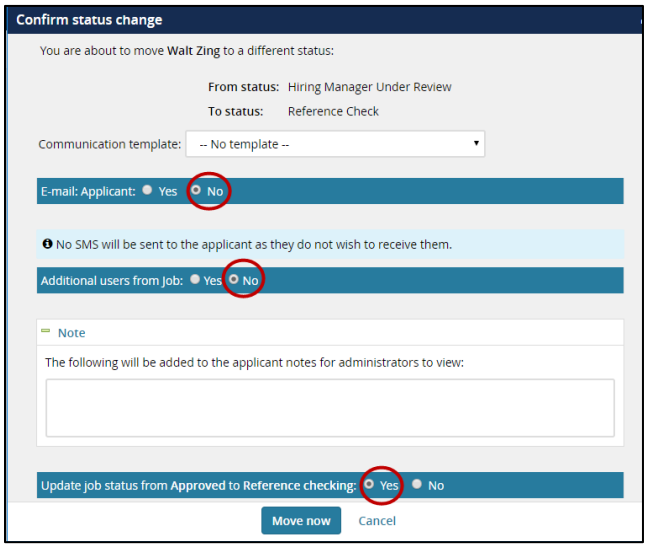
1. **Click the link** of the current applicant status.



2. **Select the appropriate applicant status** from the *Change application status* pop up window and select ***Next.***



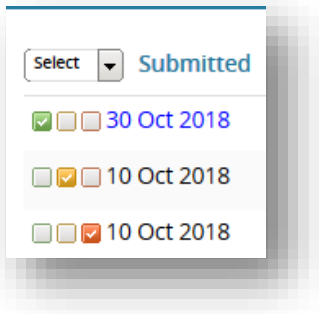
3. Select **Move now.**
   NOTE: Maintain radio button responses (circled in RED) as defaulted.



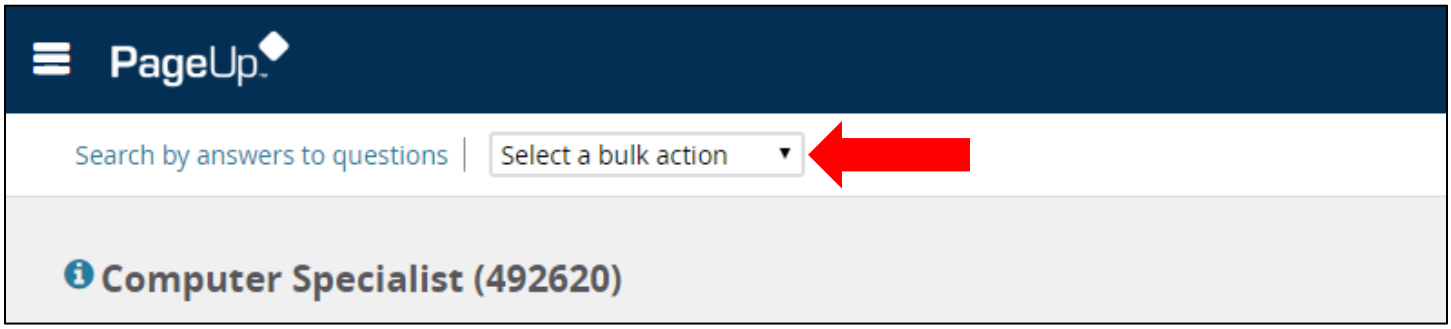
Bulk Actions

The *Bulk Action* function makes it easy to perform an action on one or more applicants at once, such as *status update*, *compile documents* or *send communication*. To perform bulk actions:

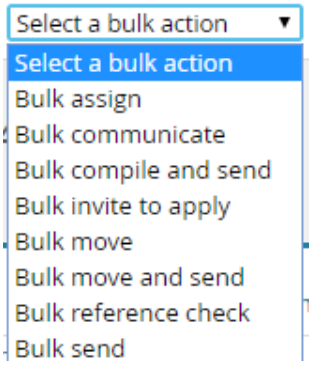
1. Group applicants- you may use the colored checkboxes to the left of the applicant names to help select and categorize applicants all at once. The boxes have no default meanings and may be used for the reviewer's preferences. For instance, the green box may be used to identify applicants for phone interview, the yellow box may be used to identify applicants who should have further review, and the red box may be used to identify applicants to be disqualified for not meeting the minimum qualifications.
   Note: the color categories are temporary and will clear if the screen is navigated away from or refreshed. Remember, the colors have no inherent meaning of their own. They can be used to classify applicants into whatever groups are needed.



2. Once the appropriate box has been checked for the applicants, use the ***Select a bulk action*** drop-down menu to select an action.



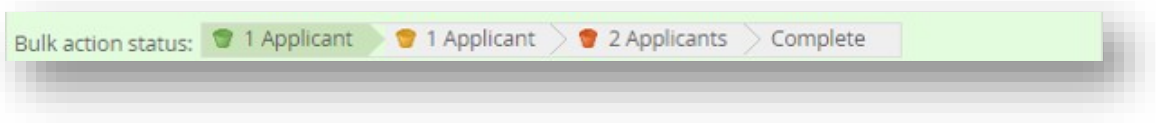
NOTE: **The PageUp bulk actions functions are extremely powerful and need to be used responsibly. Incorrect use of bulk actions can lead to large numbers of applicants being sent incorrect information.**



Defintions: Available Bulk Action Options

- **Bulk Assign:** Used to assign application to any other user in the system for review. Assigned users will be sent an email notification and receive a notification on the *Assigned Applications* task on their dashboard. The assigned user can review the application with the option to approve or decline the applicant. Approving or declining the applicant has no effect on the applicant status or progress, but is for informational purposes only. The assignee can view the feedback under history on the Applicant Card. Only one user can be assigned to the application at a time. Assigning an application to another user will cancel the previous assignment.
- **Bulk Communicate:** Used for communication with the applicants. Choose from the available templates and edit as necessary, or start from scratch. This function provides the option to set up delayed emails, but be careful as these cannot be canceled once scheduled.
- **Bulk Compile and Send:** Used to compile documents of selected applicants into a single PDF. Choose what to pull into the PDF by selecting checkboxes next to relevant information. Once the PDF is generated, download it or email the complied documents to another user in the system.
- **Bulk Invite to Apply:** This function allows users to invite existing applicants to apply for a different job. This is available via the *Manage Applications* page.
- **Bulk Move:** Used to change the application status of multiple applicants at once. Note: Do not use this action to send emails to internal users as part of the bulk move action. Otherwise, internal users will receive an email for every applicant moved into this status. To send an email to internal users, use *Bulk Move and Send,* as it will eliminate the duplicate emails.
- **Bulk Move and Send:** Used to change the application status of multiple applicants at once and send application materials to another user in a single email. This bulk action may be beneficial if other users need to be notified of the status change, but should not receive an email for each applicant.
- **Bulk Reference Check:** Rather than using the application status to trigger reference letter checks, use this option to *Bulk Refence Check*. Select the appropriate reference check form and modify the email that will be sent to the referee accordingly. The ability to modify the email is one benefit of using bulk reference check over using application status.
- **Bulk Send:** Used to send application materials to another user as a separate attachment. Each application and document for each applicant will be sent as a separate attachment. For most purposes, *Bulk Compile and Send* will be a much better option as it compiles all of the documents into one sorted attachment.

3. Once the bulk action is selected, a new window will open with instructions for that specific task. The system allows action to be taken on applicants from each color category. The bar at the top shows the color group being worked with.
   a) Enter the information or choose criteria for the green applicants.
   b) Enter the information or choose criteria for the yellow applicants.
   c) Enter the information or choose criteria for the red applicants.



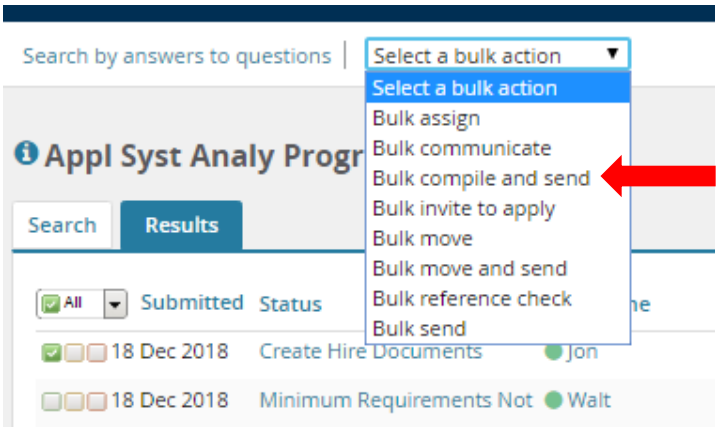
4. Regroup the applicants as necessary and repeat additional *Bulk Actions* as needed.

Bulk Compile and Send

From the *Manage Applications* screen, view and download all applicants documents into one PDF using the *Bulk Compile and Send* function.

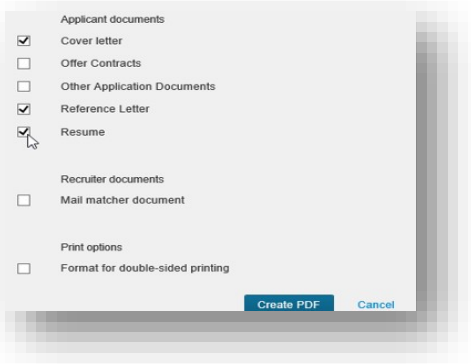
1. **Check the box** next to the name of all applicants to include in the PDF.

2. Select ***Bulk Compile and Send*** from the drop-down menu.

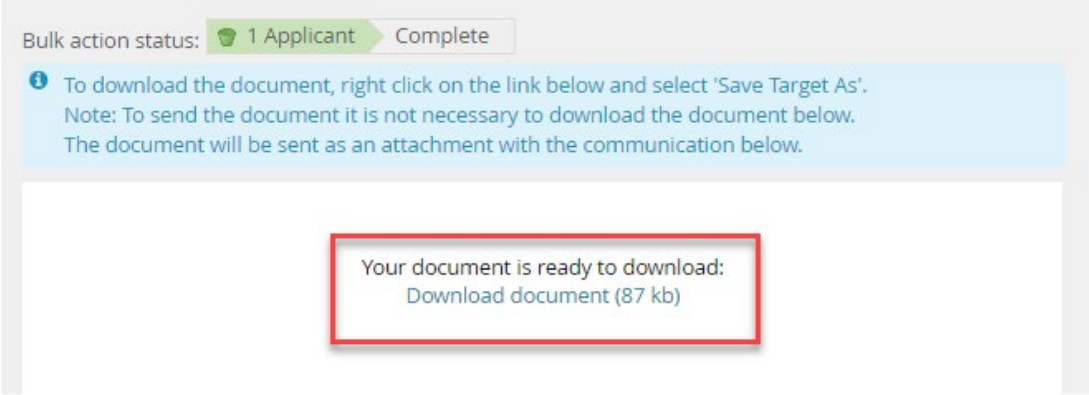


NOTE: *Bulk Complile and Send* does not send the document automatically, but does provide the option to send via email once generated.

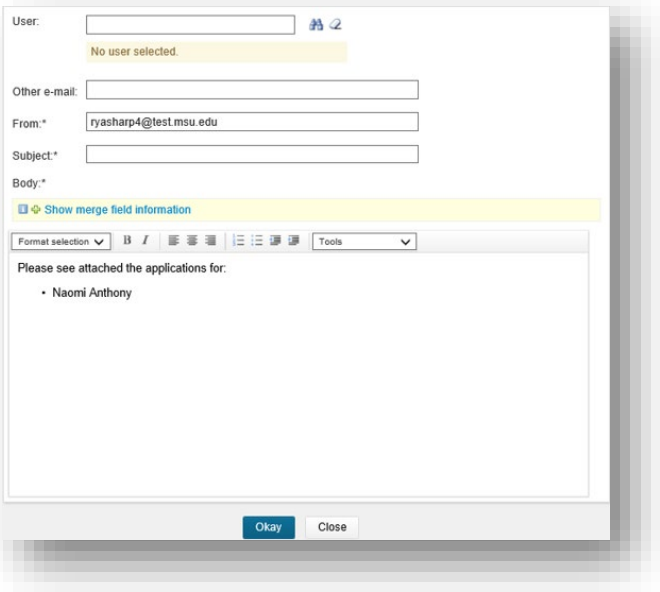
3. **Select all documents** to include and click **Create PDF**.



4. **Choose** to download the PDF or send to others for review.
   a. **To download the PDF**: click the ***Download Document*** link to open the PDF.



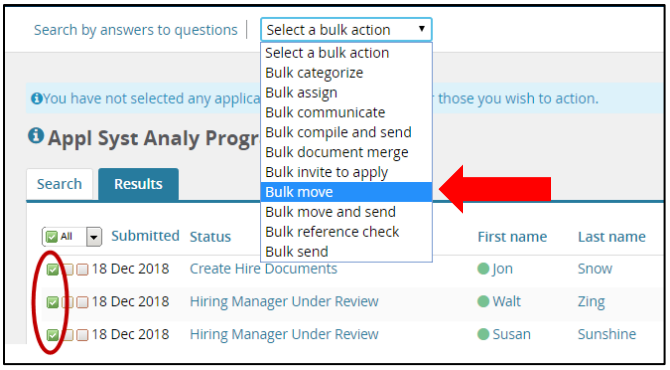
   b. **To send the PDF** to others for review, **enter information** in the email form and **edit as needed**.



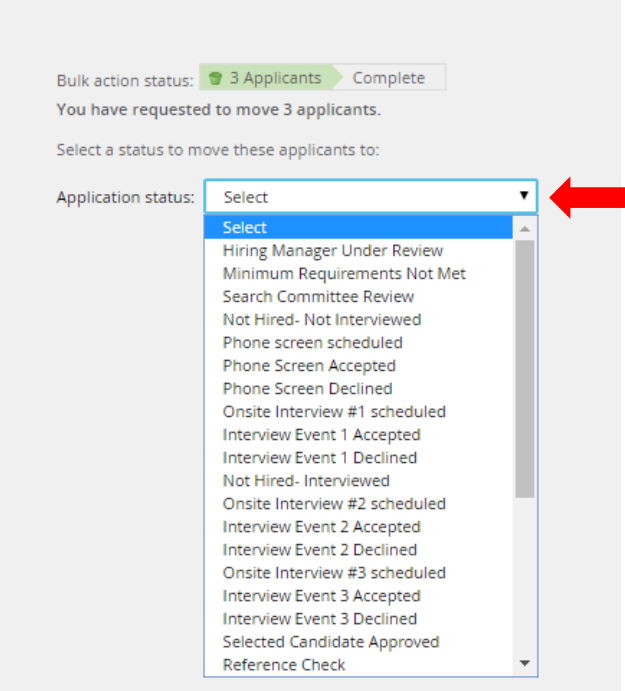
5. Click ***Okay*** to send the email and return to the *View Applicant* screen.

Bulk Move

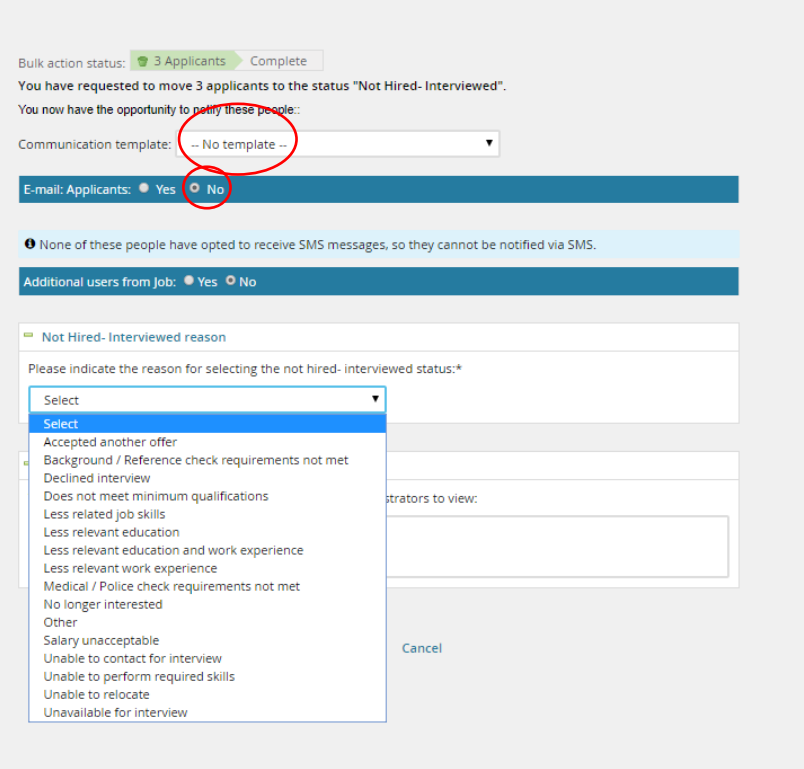
1. **Group applicants using the colored checkboxes** to the left of their names to select and categorize applicants all at once.



2. Once the appropriate box has been checked for each applicant, select ***Bulk Move*** from the drop-down menu.
3. Select the appropriate *Application status* from the drop-down menu and click ***Next.***



4. When selecting ***Not Hired – Not Interviewed*** or ***Not Hired – Interviewed***, you will need to select the rationale.

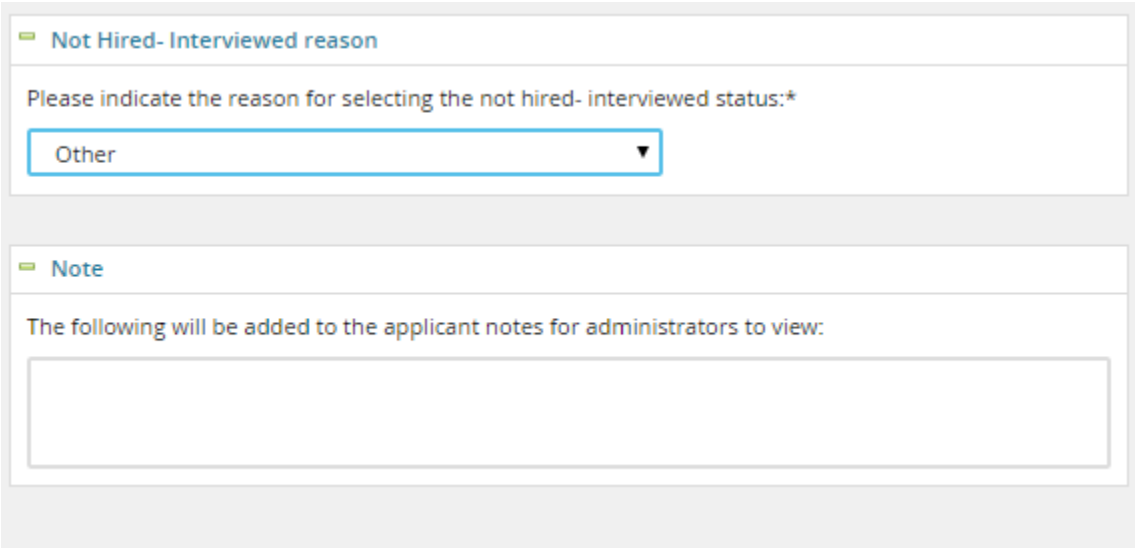


a. **Leave default settings** for *Communication template* and *Email: Applicants*

b. You may add **Additional users from Job** to communicate status change.

c. **Indicate the reason** for selecting the *Not Hired – Not Interviewed* or *Not Hired – Interviewed* status **from drop-down menu.**

d. If you select ***Other***, please enter reason in the open ***Note*** section.



5. Click ***Move now***.