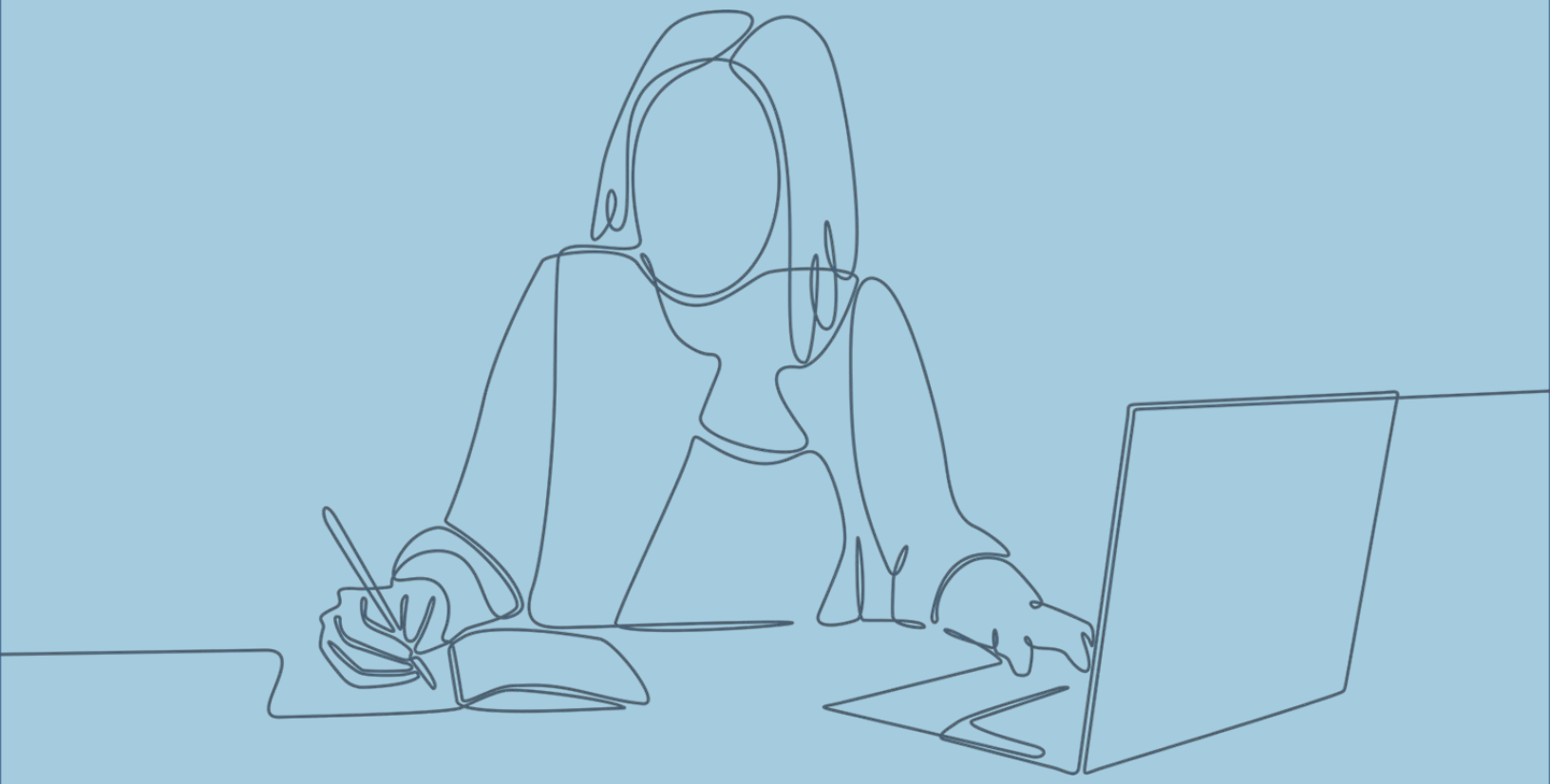
Human Resources



QUICK REFERENCE GUIDE (QRG)

How to Properly Disposition and Communicate to Candidates

A Well-Managed, Positive Candidate Experience

Yale *Learn and Grow*

FUNCTIONAL LEARNING

This Quick Reference Guide (QRG) is designed to support **Hiring Managers** through the dispositioning and candidate communications that occur throughout the requisition process.

By the end of this learning, you will:

- Outline what an HR Status is and why it's important.
- Identify each type of HR status and when it should be used.
- Identify which statuses you can view versus edit and how to edit that status in Yale Talent Network.
- Demonstrate an understanding of the different communications associated with each HR Status.
- Recognize when sending an additional, warm communication is necessary as part of best practices for a positive candidate experience.

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AUDIENCE AND PURPOSE

Audience

This guide is for **Hiring Managers**. While other members of their Department may support them through administrative processes and interviewing, the Hiring Manager is ultimately responsible for ensuring that HR Statuses associated with dispositioning and candidate communication are updated and frequently monitored for each candidate.

Purpose

Accurately using HR statuses is the key to ensuring a well-managed, positive candidate experience throughout the Talent Acquisition Recruitment Process. Updating HR Statuses allows you and the Talent Acquisition Team supporting you (TA Partners, TA Sourcing Specialists, and TA Coordinators) to monitor the process closely, communicate progress and next steps, and identify issues and delays.

By monitoring, updating, and acting on these statuses, you can help ensure a positive and efficient candidate experience, which is essential for attracting and hiring top talent. This guide has an overview of the statuses, each of which results in an action that needs to be taken by you and the Talent Acquisition team and/or a communication that is sent to the candidate. In addition to step-by-step instructions for updating a status, an overview of each status that you can either edit or monitor is provided. Best practices for additional, personalized communications are provided throughout.

STEP-BY-STEP PROCESS

DISPOSITIONING | Updating a Candidate's HR Status

Once in the Yale Talent Network, statuses can be updated individually or simultaneously if multiple candidates change from the same status to the same status.

To change an individual's status:

1. Click on the candidate's current status to bring up the status options.
2. Select the status you want to update the candidate to.
   Note: Refer to the HR Statuses Overview below for descriptions and best practices for each status.
3. Click Submit.

To change multiple statuses *simultaneously:*

Note: *This is only possible if their current statuses are the same and they are being updated to the same status*

1. Select the check boxes next to the candidates whose status you want to update.
2. Select **Actions** > **Update HR Status**.
4. Select the status you want to update the candidates to.
5. Click on **Update HR Status**.

Some Best Practices for Consideration

Remember the following best practices as you review, monitor, and update a candidate's HR status:

- Check a candidate's days in status to ensure they are moving through the recruitment process in a timely manner. As a rule of thumb, if a candidate's HR status remains the same for more than 7 days (a.k.a. 1 business week), you are potentially creating a negative candidate experience.
- Clearly identify runners-up / Silver Medalist candidates and candidates who are qualified for other roles. These support the building of talent pipelines/pools across Yale, which will help make hiring faster and simpler for other hiring needs.
- If you have personally reached out to and/or interacted with a candidate in any way, it is always a good idea to do a warm touch communication before updating their HR status. For example, after interviews, if a candidate is not moving forward in the process, you should send out a personalized turndown note and do so before their HR status is updated, which leads to an auto-generated communication to go out.
- Reach out to your TA Partner if you have any questions on a candidate's HR status or how to update it. If you have a regular meeting cadence established, bring this topic up at your next meeting. However, keep in mind that it's best not to leave a candidate's HR status the same for more than 7 days.

Understanding the Terminology

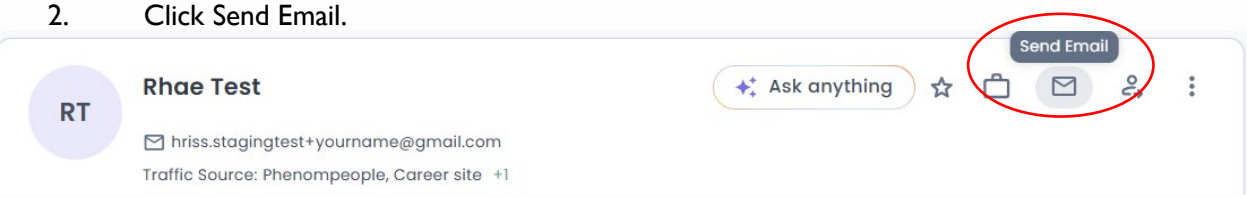
- **Silver Medalist** – A backup finalist candidate in the event a primary candidate falls through.

Communications | HR Statuses Associated Communications

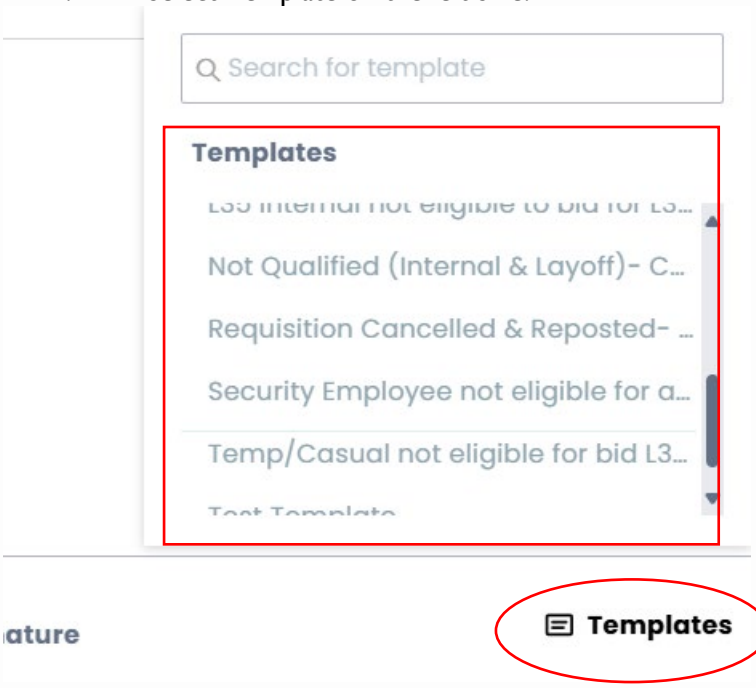
Changing a candidate's status results in an email communication to the candidate unless the status option is denoted with "no communication." The communication varies depending on the status selected.

There are some communications that involve manually editing and sending. To send a manual communication template:

1. Select the envelope next to the candidate's name.
2. Click Send Email.

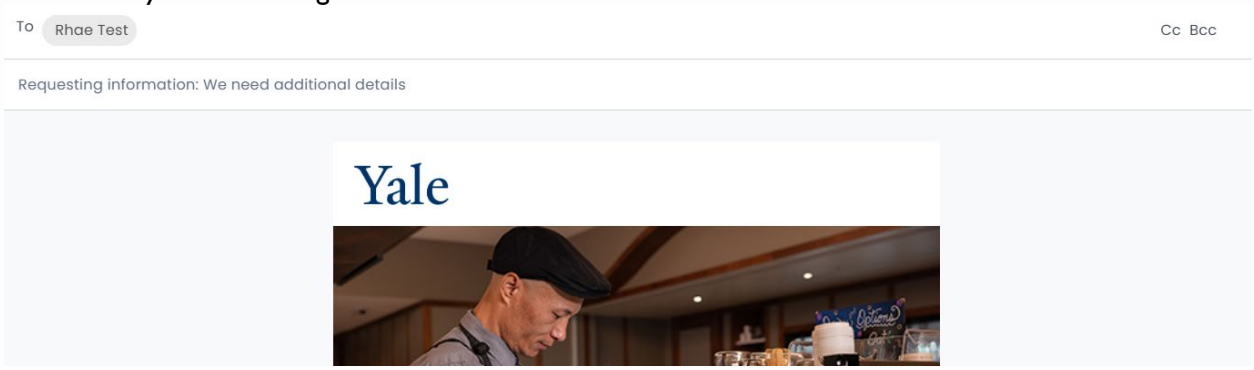


3. Candidate's email will be auto-populated.
4. Select Template on the left side.

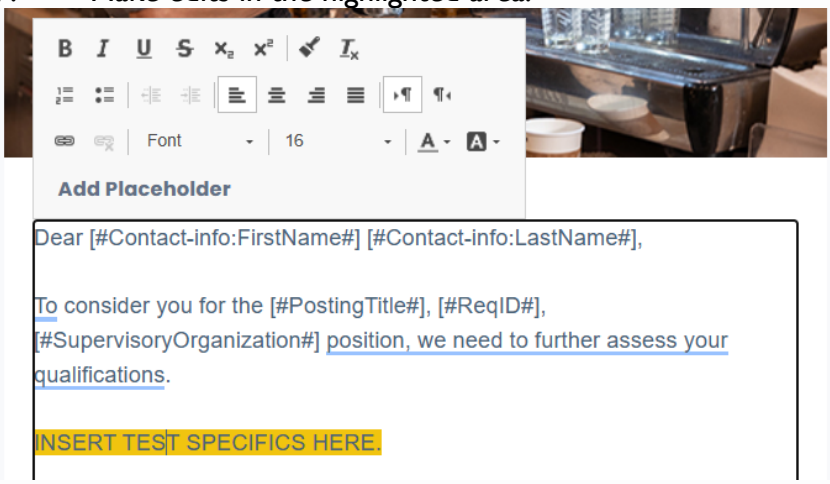


5. Select the appropriate communication template from the drop-down menu. (See image above)

6. The template will open in the email. Your email address, the subject line, and the message body will pre-populate based on the template selected. TA Partners can personalize the body of the message as needed.



7. Make edits in the highlighted area.



8. Click Send.

Some Best Practices for Consideration

Remember the following best practices as you communicate with a candidate:

- Communicate with candidates using proper Candidate Relationship Management (CRM) techniques. Refer to sample scripts or reach out to your TA Partner if you have any questions about proper candidate communications.
- If you plan to send a personalized note to a candidate, you should send it BEFORE you update their status and the automated communication goes out – e.g., if you are not moving forward with a candidate and want to send a personalized note, do it before you update the status, and the auto-generated communication goes out. Always keep the candidate's experience in mind. How would you feel if you received a personalized turndown note directly from the person you interacted with versus a turndown note sent from a system?

Understanding the Terminology

- **Candidate Relationship Management** – Refers to the process(es) used by organizations to connect and foster positive relationships with candidates.

HR Statuses Overview

HR Statuses support tracking and updating applicants throughout the recruitment process. You (the Hiring Manager) and the Department will only see candidates once they have been screened and vetted by Talent Acquisition—i.e., deemed "**Qualified for Department Review**." Talent Acquisition does this because they aim to make hiring faster and simpler for you.

The HR statuses and their definitions are included below. You will also see icons indicating your security access to either view or edit an HR Status.

HR Status	Description
Not Qualified, Referred to Manager	The candidate is not qualified BUT forwarded to the Hiring Manager/Department for review. Used only as requested by the Hiring Manager/Department. Scenarios include: • The Hiring Manager/Department wants to grant an interview to all candidates in their Department, even if they are not qualified. • The Hiring Manager/Department wants to see everyone to confirm that qualified candidates are not being screened out. **NOTE:** Candidates will not be moved forward in the process if they remain in a "Not Qualified" HR status.
Not Qualified - L34 Layoff, Paperwork Sent	Layoff candidate that does not meet all the minimum qualifications. However, the candidate is being shared with you (the Hiring Manager) to determine if you are flexible in your job requirements and to consider this candidate. **NOTE:** Candidates will not be moved forward in the process if they have a "Not Qualified" HR status.
Qualified – Dept. Review, TA Interviewed	Qualified candidates that have been screened and further vetted by TA. referred to you (the Hiring Manager) and recommended to be part of the candidate slate for department interviews. **Best Practice for Consideration:** Work with your TA Partner as you review these candidates and determine who you want to move forward in the recruitment process.
Qualified – Dept. Review, No TA Interview	Qualified candidate that has been screened but has not been further vetted by TA. Referred to you (the Hiring Manager) to be part of the candidate slate for department interviews.

HR Status	Description
	Note: This HR status may be used for several reasons, including the Hiring Manager or Department may have referred the candidate to the role, the TA may have already previously vetted the candidate, or the candidate is deemed highly qualified, and the TA does not feel that further vetting is needed.
Qualified – Degree Contingency	Qualified Candidate meets all posted requirements EXCEPT the degree which will be obtained by the candidate who is in the final semester of their degree program. Application materials note the date the degree will be earned.
Qualified – L35 Assessment Pending	L35 Use Only. Qualified Candidate that has met all requirements EXCEPT the assessment. If the candidate passes the assessment, they can be considered for the position.
Dept - Request TA Interview	Hiring Manager/Department is requesting further vetting (via TA interview) of a Qualified Candidate who did not previously have an interview with a TA.
Dept – Interview(s) Scheduled/Pending	The Hiring Manager/Department is in the process of scheduling/conducting interviews with the candidate. **Best Practice for Consideration:** To keep candidates engaged in the recruitment process, you (the Hiring Manager) do not want them in this status for too long – interviews should be scheduled and conducted in a timely manner, pending interviewer and interviewee availability.
Dept - Interview(s) Completed	Qualified Candidate has been interviewed by the Hiring Manager/Department. **Best Practices for Consideration:** • Prior to updating the HR status of a candidate who made it to this stage of the recruitment process, send a personalized communication. As needed, refer to some sample scripts and/or consult with your TA Partner. • If you feel the candidate may be a Qualified Candidate for your role, ensure they have a positive experience throughout this process (especially as they wait on a final decision). This keeps them engaged and motivates them to continue with the recruitment process. And should they not be a final candidate, a positive experience may encourage them to apply to other roles in the future.
Dept - Not Interested, No Dept Interview	Final status of a candidate who was referred to you (the Hiring Manager) but not selected for a Department interview.

HR Status	Description
	Best Practice for Consideration: If you feel the candidate may be a Qualified Candidate for other roles at Yale, ensure you inform your TA Partner about this. They will work with other TA Team Members to add this candidate to the appropriate Yale talent pipelines/pools.
Dept - Not Interested, Dept Interviewed	Final status of a candidate who was referred to you (the Hiring Manager) and went through Department interviews but was not selected as the final candidate nor identified as a runner-up / Silver Medalist candidate. **Best Practices for Consideration:** • Prior to updating their HR status, send the non-finalist a communication thanking them for taking the time to go through the recruitment process. Although they were not selected for this role, they may be potential Qualified Candidates for future roles at Yale. Ensuring a positive experience in this process may encourage them to apply to other roles in the future. As needed, refer to some sample scripts and/or consult with your TA Partner. • Inform your TA Partner about the progress of your interviews and the decisions you (the Hiring Manager) make. They are responsible for ensuring the candidate is updated on their application status and will also reach out to the candidate for feedback.
Silver Medalist	Qualified Candidate was identified as a finalist and runner-up for the role. This designation is given once a primary candidate has been confirmed—i.e., has been processed as a New Hire in Workday. **Note:** Designating (highly) Qualified Candidates for this HR Status is important as these candidates are a critical part of Yale's talent pipelines/pools and support TA's sourcing strategy.
Dept - Request Reference Check	The Hiring Manager/Department is requesting that TA proceed with checking references for this candidate as they have been deemed the primary candidate for the role. You (the Hiring Manager) want to make an offer to this candidate contingent on them passing reference checks. **Best Practice for Consideration:** Ensure you (the Hiring Manager) are providing your completed evaluation form to your TA Partner so that they can move forward with checking the references of your primary candidate.

HR Status	Description
References – In Progress	References are in progress for the primary candidate. **Note:** The TA Partner will update this HR status if SkillSurvey is being used (therefore, it will be a View Only status). The Department will update this HR status if references are being checked without SkillSurvey (therefore, it will be an Edit status).
References - Completed, Dept Review	References have been completed and are being reviewed by the Hiring Manager/Department. **Note:** The TA Partner will update this HR status if SkillSurvey is being used (therefore, it will be a View Only status). The Department will update this HR status if references are being checked without SkillSurvey (therefore, it will be an Edit status).
References - Completed, Dept Not Interested	Final status of a candidate who had references completed but the Department is not interested in proceeding with an offer. **Best Practice Consideration:** Prior to updating the HR status of the candidate, send a communication thanking them for taking the time to go through the recruitment process. Although they were not selected for this role, they may be potential Qualified Candidates for future roles at Yale. Ensuring they have a positive experience in this process may encourage them to apply to other roles in the future. As needed, refer to some sample scripts and/or consult with your TA Partner.
References - Completed, Request Offer	References have been completed for the primary candidate, and the Hiring Manager/Department would like TA to proceed with extending an offer.
Offer - Pending/ Extended	The offer form has been submitted by the TA Partner, once approved, TAP will contact the candidate to extend the offer. **Best Practice for Consideration:** In parallel with updating the HR status of the candidate, send a communication or make a phone call congratulating them on being the chosen candidate and letting them know that they will get more details from their TA Partner. As needed, refer to some sample scripts and/ or consult with your TA Partner.
Offer - Accepted	Primary candidate has accepted the offer and should now go through the Background Check (BGC) process.
Offer - Declined	Status for a primary candidate who was offered a position and has declined the offer. A new Primary Candidate needs to be designated.

HR Status	Description
	Best Practice for Consideration: The TA Partner will be collaborating with you on next steps including revisiting runner-up / Silver Medalist candidates for consideration.
Background Check – At Vendor	Primary candidate's background check is being processed by the BGC vendor. **Note:** This HR status is used to keep the Hiring Manager/ Department apprised of where the candidate is in the BGC process.
Background Check – Under Review	Primary candidate's background check results returned to Yale and require an internal review before the BGC can be adjudicated. **Note:** This HR status is used to keep the Hiring Manager/ Department apprised of where the candidate is in the BGC process.
Background Check - Meets Policy	Primary candidate's background check is complete, and candidate met Yale policy. The candidate can now be processed in Workday as a New Hire. **Note:** This HR status is used to keep the Hiring Manager/ Department apprised of where the candidate is in the BGC process.
Background Check – Does Not Meet Policy	Primary candidate's background check is complete, and the candidate did not meet Yale policy. **Note:** This HR status is used to keep the Hiring Manager/ Department apprised of where the candidate is in the BGC process. **Best Practice for Consideration:** The TA Partner will be collaborating with you on next steps including revisiting runner-up / Silver Medalist candidates for consideration.
Workday Hire	The primary candidate has been successfully hired into the role in Workday, and the hire details have been reviewed in Workday by the TA Coordinator. **Best Practice for Consideration:** Once the Primary Candidate has been confirmed as a Workday Hire (New Hire), send a communication welcoming them to your team. Be sure to include pertinent Onboarding information such as their NetID and start date details. As needed, refer to the New Hire Checklist and/ or consult with your TA Partner.
Offer - Rescinded	Final status for the candidate who was offered a position but was rescinded.
Candidate Unresponsive	Qualified candidate has not responded after several attempts have been made to make contact by the Department and TA team.

HR Status	Description
	Best Practice for Consideration: As a rule of thumb, two attempts to reach out to the candidate using two different communication methods of communication (e.g., email, phone/text, IM/web, etc.) is a reasonable number of attempts.

SUPPLEMENTAL MATERIALS

What's Next

Thank you for reading this QRG. To further supplement your learning, we recommend you review the **Proper Candidate Relationship Management QRG**.

Supplemental Learning

For a full listing of learning available:

- Quick Reference Guides
  - **How to Properly Disposition and Communicate to Candidates**
  - **Proper Candidate Relationship Management Quick Reference Guide**
  - **How to Effectively Schedule and Conduct Interviews Quick Reference Guide**

Supplemental Tools

For a full listing of tools available:

- Sites
  - **Manager Toolkit**
  - **Hiring Guide**
  - **Reference Checks and SkillSurvey Webpage**

GLOSSARY

For a full listing of terminology, click **here.**

Contact: learning@yale.edu

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