# CareerQ REFERENCE GUIDE – HIRING MANAGER

## USERS

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1. **Common Icon Legend:** These often confusing icons can be found throughout CareerQ, it is important to note what actions each of them are used for.

- = This is a ‘Selection Arrow’, which is something you will look for and use anytime you want to access a template, database of users, and other pre-configured objects within the system

- = This looks like a clock and allows you to view the stages a candidate has progressed through. It is also where Hiring Managers access the offer letter request form

- = Found in candidate lists, this accesses employment reference progression. It will change colour depending on the current status of references. (Blue = No Action; Yellow = In Progress; Green = Successful; Red = Unsuccessful

- = Found in candidate lists, this is how users access documents (resumes) that a candidate has submitted as part of their application

- = Found at the top your screen, this is how you access and upload documents to your user profile, a job, and a candidate

- = This CareerQ logo can be found at any time while navigating CareerQ in the top left hand corner. Click this to navigate back to the home screen at any point.

- And = Are referred to as the Radio buttons. These are clickable icons to initiate various actions throughout CareerQ

2. **Glossary of Terms:** Commonly used terms throughout CareerQ

**Staffing Request Form (SRF)** = Universal form used to begin the recruitment process

**Requisition** = Job, Competition, Position

**Recruiter** = Anyone with HR Access, which gives access to full system (HR Advisors, HR Managers)

**Hiring Manager** = Users within departments that have been given limited access to facilitate hires for their area (Departmental Managers, Dept. Administrators, Dept. HR Representatives, etc.)

**Broadcast** = Advertise job

**Correspondence** = Email sent from system. Can be initiated by a user or automated by CareerQ

3. **Simple Recruitment Process:** A general overview of the recruitment process, a more detailed and lengthy process can be found at the file path listed below.

* Full recruitment process: Q:\HR\Recruitment Management System\Process Map\TOBE Process Map
4. **Logging into the system:** This is how to access the CareerQ system as a Hiring Manager. Once you have found the link, be sure to save it to your favourites for future ease of access.
   i. Link can be found on the Queens HR website in the Management Tools – Hiring An Employee. If you have been sent an email to review candidates, the link is embedded in that message.
   ii. System is single sign-on, so use your net id and password to log in.
   iii. You will land on home page

5. **General Navigation of CareerQ:** General tips and tricks on how to navigate CareerQ; included are often overlooked but essential functions to managing CareerQ data.
   a. **Finding the Home Page**
      i. From any screen in the system you are able to click the home screen icon on the top left side of page, which will return you to your home page on the Job Orders tab where you can access all jobs you are associated with.
      ii. **Use your home logo to navigate the system rather than using your back button, as the back button can create errors**
   b. **Using the Job Status Bar**
      i. On the home page of CareerQ, you will see a dropdown menu titled “Job Status”. The default option is “Open”
      ![Job Status Menu]
      ii. Here we can see all the options available for filtering Job orders or Candidates. If you cannot find a specific Job, click “All Statuses” then click refresh. This will show you all Job Orders you are assigned to in the system, regardless of what status they are in the recruitment process.
   c. **Checking Approval Status**
      i. As the requisition creator you can now access approvals that are in progress from your “Approvals” tab on your home screen, which lets you see the responses of people who have approved, and see approvers who have not yet responded.
      ii. In the approvals tab, you will see “Status” of your approval request. In Progress, Approved, and Paused are “Statuses” you may see. If you see “Paused,” and you are not intending to edit a SRF, please refer below to Section 6 Part C to resume.

6. **Creating Staffing Request Form & Obtaining Approvals:** Creating a Staffing Request Form (SRF) and obtaining the appropriate approvals initiates the recruitment process.
   **Note:** If you are creating a job you have created in the past, see section 8 on ‘Cloning/Copying a pre-existing SRF’, if this job is unique, continue with instructions in this section.
a. **Creating the SRF**
   i. Click ‘Requisition’ under ‘New’ menu at top of your screen
   ii. Proceed to fill in the form
   iii. Form is dynamic – Some options you select show new fields requiring additional information
   iv. An additional 4 lines are available for funding under “Position Funding” by pressing the “+” button at the bottom of the page.
   v. Click ‘Save’ when complete
   vi. The form will prompt a warning for you if there is missing information
   vii. You will now be redirected to the ‘Approval Wizard’

b. **Obtaining Approvals**
   i. Use the selection arrow to open a window to select approvers
   ii. Select names of people who are required to approve positions for your department, which needs to end with appropriate budget approval
   iii. Click Ok
   iv. Click Next
   v. Click Next
   vi. Review details of job and click next
   vii. **Click the ‘Start’ hyperlink to initiate the approval workflow**

<table>
<thead>
<tr>
<th>Request # 834</th>
<th>Recruitment Request Approval: J0319-0042 - Reference Guide Tester 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Paused</td>
</tr>
<tr>
<td>Action</td>
<td>[Select] ---</td>
</tr>
<tr>
<td>[Select]</td>
<td></td>
</tr>
<tr>
<td>[Start/Restart]</td>
<td></td>
</tr>
<tr>
<td>Close</td>
<td></td>
</tr>
</tbody>
</table>

   viii. In the yellow dropdown list select Start/Restart
   ix. Click Update (Wait for text saying the “Approval request was successfully sent.”)
   x. Click Close
   xi. Approvers will now be sent an email to approve in the sequence you have entered them. Ie. Approver #2 will not receive and email until Approver #1 has approved. If declined by any approver, you will be sent a notification.

C. **Checking Status Of Approval Request**
   i. As the requisition creator you can now access approvals that are in process from your “Approvals” tab on your home screen or within an individual job, which lets you see the responses of people who have approved, and see approvers who have not yet responded.
   ii. In the approvals tab, you will see “Status” of your approval request. In Progress, Approved, and Paused are “Statuses” you may see. If you see “Paused,” and you are not
intending to edit the SRF, refer to the remaining steps in this section to activate your approvals and send requests to approvers.

iii. Click the radio button \(\Rightarrow\) beside the active approval

iv. Click “Control” button

v. Using yellow dropdown field, select “Start/Restart”

vi. Click Update

vii. Click Close

7. Editing a pre-existing Staffing Request Form (SRF)/Approval Path: Any SRF that has been edited in any way must be re-submitted for approval. If you need to edit an already approved SRF, you must contact your HR Advisor.

i. Ensure that you are on the CareerQ home page by clicking the home screen icon

ii. Click the job you wish to work with

iii. Click the Approval tab

iv. Click the radio button \(\Rightarrow\) beside the active approval. If status of approval is ‘Paused’, continue to step viii.

v. Click “Control” button

vi. Using yellow dropdown field, select “Pause”

vii. Click Update

viii. Click Close

ix. Click Candidates tab

x. Hover your pointer over ‘Other Job Functions’ at bottom of screen, and click ‘Edit Job’ (See image on right)

xi. This will open the Staffing Request Form

xii. Complete you edits and submit for approval by following steps in Section 6b of this guide

8. Cloning/Copying a pre-existing Staffing Request Form (SRF):
Clone a job you have created in the past to save time entering all data in the SRF.

i. Click ‘Requisition’ under ‘New’ menu at top of your screen

ii. At the top of the SRF, click the “Clone Position” link. This will prompt a new window.

iii. Jobs that you have been previously attached to will populate first. If what you are looking for is not here, use the “Status” dropdown menu to find jobs that may be Closed or Pending Approval.

iv. Once you have located the desired SRF to clone, click the position so it is highlighted blue, then hit OK.

v. After the SRF has been populated with the pre-existing information, there are still required fields to fill.

vi. Enter; Salary, Grade, Evaluation Points, # of positions.

vii. Enter appropriate Position Funding; up to five lines of funding can be entered by using +

viii. Press Save.

ix. Refer to Section 6 Part B to complete the approval requests.
9. **Identifying Employee Groups & Employment Statuses:** If requested, HR will release all applicants to a job, which means it is the responsibility of the department to identify candidates internal to a competition.

   i. From your home screen, click on the job you would like to work with
   
   ii. Here you will see the candidate list. In the candidate list, click ‘Emp. Info.’ column header twice to sort by employment status and bring the Emp. Status to the top of the screen.

   iii. Emp. Group tells you the Employee Group and Emp. Info. This tells you their current employment status

   iv. See Section 10 for a legend of Employee Group and Employee Info identifying codes.

10. **Employee Groups & Employment Status Legend:** Commonly found employee language

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>US2</td>
<td>Academic Assistant (USW Unit 2 Union member)</td>
</tr>
<tr>
<td>CAS</td>
<td>Casual</td>
</tr>
<tr>
<td>132</td>
<td>CUPE 1302</td>
</tr>
<tr>
<td>229</td>
<td>CUPE 229</td>
</tr>
<tr>
<td>254</td>
<td>CUPE 254</td>
</tr>
<tr>
<td>GEN</td>
<td>General Staff (non-union)</td>
</tr>
<tr>
<td>USW</td>
<td>USW Local 2010</td>
</tr>
<tr>
<td>OPS</td>
<td>OPSEU</td>
</tr>
<tr>
<td>ONA</td>
<td>ONA</td>
</tr>
<tr>
<td>PSA</td>
<td>Post-Doc, PSAC Unit 2</td>
</tr>
<tr>
<td>PDF</td>
<td>Post-Doc (non-union)</td>
</tr>
<tr>
<td>RES</td>
<td>Research (RG&amp;C)</td>
</tr>
<tr>
<td>OTH</td>
<td>Doesn’t match one of the above ee groups (i.e. Academic, Student, etc.)</td>
</tr>
<tr>
<td>TWP</td>
<td>Terminated with Pay</td>
</tr>
<tr>
<td>TER</td>
<td>Terminated no pay or deceased</td>
</tr>
<tr>
<td>RET</td>
<td>Retired with or without pay (benefits)</td>
</tr>
<tr>
<td>WRN</td>
<td>Person who has been terminated with conditions (past or present)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>LVE</td>
</tr>
<tr>
<td>RDP</td>
</tr>
<tr>
<td>ACC</td>
</tr>
<tr>
<td>180</td>
</tr>
</tbody>
</table>

11. **Hiring Committee Management:** Commonly used functions as a Hiring manager.

   a. **Adding Hiring Committee members**

      i. Ensure that you are on the CareerQ home page
      
      ii. Click the job you wish to add Hiring Committee members to
iii. Click on the “Details” tab
iv. Click the selection arrow beside “Hiring Committee” at the bottom of the screen.

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Title</th>
<th>Phone</th>
<th>Email</th>
<th># of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRRMS CM</td>
<td></td>
<td>613-533-2000</td>
<td><a href="mailto:hrrmscm@queensu.ca">hrrmscm@queensu.ca</a></td>
<td>0</td>
</tr>
</tbody>
</table>

v. Click the “Selection Arrow” at the bottom of the pop-up window.
vi. Add Hiring Committee members by searching, clicking their name, and clicking the “Add” button. Continue until all committee members appear in the “Items Selected” field.

vii. Click Ok
viii. Click Save
ix. Click Close

b. **Inviting Hiring Committee Members to Review Candidates:** Invite the hiring committee to review applicants and provide feedback using CareerQ.
i. If you wish to shortlist the applicants before you invite the hiring committee to review candidates, you may DECLINE (See section 16 for how to Decline) candidates that do not meet the minimum required qualifications for the position, making it easier for your hiring committee to provide feedback.

ii. Ensure that you are on the CareerQ Home Page
iii. Click on the job that you want to work with
iv. Within the Job Screen, click on the “Details” tab
v. Ensure all Hiring Committee members have been added. Add more if needed by referencing Part A of this section
vi. Check the boxes beside the names of your Hiring Committee members in the Hiring Committee section at the bottom of your screen.

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Title</th>
<th>Phone</th>
<th>Email</th>
<th># of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRRMS CM</td>
<td></td>
<td>613-533-2000</td>
<td><a href="mailto:hrrmscm@queensu.ca">hrrmscm@queensu.ca</a></td>
<td>0</td>
</tr>
<tr>
<td>Taylor McDonald</td>
<td></td>
<td>613-533-2000</td>
<td><a href="mailto:tm134@queensu.ca">tm134@queensu.ca</a></td>
<td>0</td>
</tr>
</tbody>
</table>

vii. Click the Selection Arrow beside Email in the Hiring Committee section

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Title</th>
<th>Phone</th>
<th>Email</th>
<th># of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRRMS CM</td>
<td></td>
<td>613-533-2000</td>
<td><a href="mailto:hrrmscm@queensu.ca">hrrmscm@queensu.ca</a></td>
<td>0</td>
</tr>
<tr>
<td>Taylor McDonald</td>
<td></td>
<td>613-533-2000</td>
<td><a href="mailto:tm134@queensu.ca">tm134@queensu.ca</a></td>
<td>0</td>
</tr>
</tbody>
</table>

viii. Click Send on the email message that, which will notify committee members that there are applicants to review and will provide instructions to do so. You are copied on this email.
ix. Click Close
12. Reviewing Applicants To Competition: This section will outline how to access information candidates have provided as part of their application so you can make hiring decisions.

i. Ensure that you are on the CareerQ home page by clicking the home screen icon.

ii. Click on the job you wish to work with. You will be taken to the “Candidates” tab within the job, where you will see the list of applicants. If your job has closed and you do not see applicants, contact your HR Advisor.

iii. If you have asked your HR Advisor to send you all candidates at once, it is the department’s responsibility to ensure candidates are reviewed in accordance with their respective collective agreement. Reference Section 9 for instructions on how to identify candidates who are internal to your competition.

iv. Click the Word icon to access documents candidates have submitted as their application (ie. Resume) – See image below.

v. If you have worked with your HR Advisor to attach pre-screen questions to your competition, which are questions candidate need to answer while submitting an application, click on the link under “Survey Score” column to view pre-screen question results.

vi. If you have worked with your HR Advisor to assign skills to your competition, The “Index” column is a score that represents how closely the skills that were assigned to the job match the skills a candidate assigned to their profile. If you did not ask your HR Advisor to assign skills to your job, you will not receive a score here.

vii. To confirm if a candidate is legally eligible to work in Canada, press and hold “Control” while clicking the candidate’s name to open their profile information. This information can be found in the ‘More’ tab. You can close this window when you are done.

viii. You have now reviewed all important information regarding a candidate’s application.

13. Attaching Documents In CareerQ: Attaching offer letters and job descriptions to CareerQ can help facilitate the recruitment process.

i. Documents must be uploaded and attached in either one (1) of two (2) different upload folders in the CareerQ system to enable you to attach them to correspondences & approvals.

ii. The documents that you upload to one (1) of these two (2) folders can only be accessed from that specific location; you cannot upload a document to upload folder one (1) and observe this document in upload folder two (2), so be sure of where you are uploading your documents.

iii. The two (2) upload folders in CareerQ can be found in the following locations:
Your Profile – From the CareerQ homescreen, you will find an Upload Folder at the top of the screen next to your username and information.

A Job – From the CareerQ homescreen, click on the job you would like to attach a document to. You will find an Upload Folder at the top of the screen.

iv. Go to your home screen and follow the above step. Click on the yellow upload folder to begin the document upload process. A new window will open.

v. In this new pop-up window, you will find an “Upload” button at the top of the screen. Pressing this will change the bottom half of the pop-up window, and allow you to proceed.

vi. In the bottom part of the pop-up window, press the “Browse” button. This will open up your computer’s files. Find the file you wish to upload to CareerQ, and double click it.

vii. Optional: If applicable, use the drop down menu at this point to indicate what type of document that is being uploaded. This makes it easier to identify later.

viii. After the desired file has been selected, press the second upload button, located beside the browse button. See image below.

ix. Wait for a red text alert in the pop-up window saying that the document “uploaded ok.”

x. Close the window.

xi. You can now access the document by clicking the folder you uploaded it to. Additionally, your document is now available to attach to email templates sent by the system.
14. Declining Candidates: Candidates should be first screened out and declined before progressing other candidates through the stages. This makes this more manageable and easier to navigate.

i. Ensure that you are on the CareerQ home page by clicking the home screen icon.
ii. Click on the Job Order that you would like to work with.
iii. Click the checkbox beside the name of the candidate(s) you wish to decline. You can select multiple candidates by checking off multiple boxes.
iv. Once candidates to be declined have been selected, hover your cursor over the “Job Functions” menu at the bottom left of your screen to reveal the menu options.
v. Click Decline. This process is pictured below.
vi. If selecting multiple, click “Ok” in the pop-up window.
vii. In this pop-up window, at the top of the screen, use the drop-down menu to select a reason for declining the candidate. Typically we would choose “Doesn’t Meet Qualifications” or “More Suitable Candidate”. Do not send a notification from CareerQ.
viii. Click “Finish.”
ix. Click “Close.”
x. Within the job screen, you can access declined candidates by clicking the “Declined Candidates” link at the top of the “Activity Chart.”

15. Understanding the Candidate Progression stages in CareerQ: After HR has released candidates, the Hiring Manager can then observe and review candidates that have made it to the “SUB” stage or beyond. If your job has closed and you do not see applicants, contact your HR Advisor.

i. Ensure that you are on the CareerQ home page by clicking the home screen icon.
ii. Click on the Job Order that you are looking to progress Candidates through hiring process.
iii. In the Job Activity Chart, look under the column header “STG.”
iv. Under the STG column, you will find each of your Candidates colour coded to a different stage of the recruitment process. Below are some common stages you will see:
   - **SUB** = First stage of access for Hiring Managers. Candidates that have been initially shared.
INT# = Candidates who are being interviewed. The # is a varying number that refers to how many times the candidate has been scheduled for an interview.

OFR = Candidate that has been sent their offer package.

To move candidates to next stage, click on the coloured stage icon to the left of your candidate’s name. To move multiple candidates, select the checkboxes beside all candidate names you wish to move, and then click the coloured stage icon beside one of the selected candidate’s names.

16. Interview Scheduling Guide: Step by step on how to book a candidate for an interview using the built in CareerQ interview scheduler wizard. This makes it easy for candidates to select interview times and for hiring committees to stay informed of the process.

a) Ensure that you are on the CareerQ home page by clicking the home screen icon.
b) From the home screen, click the Job Order that you would like to schedule interviews for.
i. Click on the “SUB” or “INT#” stage icon (depending on current stage of candidate) next to the candidate. This will open up the Interview Scheduler. Select multiple candidates by clicking check boxes beside their names and clicking the “SUB or “INT#” coloured icon next to one of the selected candidate’s name.

ii. Click “Use Interview Scheduler Wizard” and click “Submit” This will open up a new screen.

iii. In the new window, see Section 1. Be sure the invited candidate(s) matches who you wish to interview. If needed, you can add more candidates by using the “Add Additional Candidates” drop down menu and selecting additional candidates from the list.

iv. Moving onto Step 2, Setup contact. First, you will need to set up a primary contact, which is typically the individual setting up the interviews. Secondly, you will see the Hiring Committee listed here. Double click their names to add them to the mailing list, or use the Selection Arrow to find other contacts to add. This ensures committee members are informed of the process, and notified when a candidate selects an interview time.

v. In Section 3, Schedule Information, make sure to use the “Interview Type” drop down menu to select what type of interview you are conducting. Here you also set a name and expiry date for the interview.

vi. In Section 4, click on “Date” to pick a date for the interview, and then click on “Start Time” to select a time for the interview, and then set the duration in the next box. Finally, type in the “Interview Location,” and “Max. Capacity” (# of candidates being interviewed at one time). After all of these rows have been populated, click “Add.” You will now see the information in the “Timeslots” box. This is pictured below.

vii. Once you have entered all available interview times, click ‘Next.”
viii. Click “Next” to send the interview scheduler email to your committee.
ix. This will open a new window. Look at the bottom of the window, and click on the Selection arrow next to “Choose Template.”
x. In the new window, click “Template >>” To see a yellow drop-down menu. Click the most appropriate selection, (pictured below) this will auto-populate an email.

![Template dropdown menu](image)
xii. Click “OK” to close the template window.
xii. Read the template email and edit if you have unique instructions for candidates, or wish to personalize the email being sent to candidates.
xiii. In the newly populated email window, scroll to the bottom and click “Next.”
xiv. These windows will now close and return you to the “Candidates” tab. Under the “STG” column, the candidate will now have a Green “INT#” icon.
xv. Candidates have now been invited to select one of the timeslots you have provided, and the Hiring Committee will receive a confirmation email when they do so, with a link that will add the interview to their calendar.