NEW Applicant Tracking System :
BALANCEtrak Learner's Guide

Job Seeker & Hiring Manager Training*

*Please note procedures may be subject to change

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What is BALANCEtrak?

- BALANCEtrak is the new online applicant tracking system, or ATS
- It is used to control, manage, & organize workflow around finding the right candidates for your job openings

BALANCEtrak is the new applicant tracking system (or ATS) that the college is now utilizing. It is a means by which to manage workflow when it comes to screening applicants, managing candidates, coordinating interviews, and hiring the right talent. Many colleges, universities, and companies are utilizing online systems such as this, so we are adopting an industry best practice.

Why make the switch?

- **Streamlined process** - BALANCEtrak helps to organize and simplify the hiring process, eliminating confusion and redundancies
- **Ease of access** - BALANCEtrak can be securely accessed anywhere, at anytime, as long as there is an internet connection
- **Security** - Data is stored on a secure, off-site server
- **Modernization** – electronic ATS systems are a best practice as seen in numerous other colleges, universities, and Fortune 500 companies

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There are many reasons to make the switch, but the strongest reasons are the benefits of a stream lined process, increased ease of access, advanced security of information, and an overall modernization of the department.

Why make the switch?

- **For Job Seekers**:
  - Will be able to create an online profile to manage all of your application materials, resumes, and cover letters
  - No more paper! All resumes and application materials will be submitted electronically
  - You will be able to see your application history on one page
  - Will receive automatically generated email updates regarding your status in the process
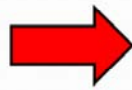
If you are a job seeker, then you will really appreciate the features of this system. Just as you would do with CareerBuilder or Monster, you will now be able to create an online profile with which you will manage your resumes, cover letters, applications, transcripts, and any other documents you may upload. Once you create a profile you will be able to more easily apply to multiple openings without having to complete a new application each and every time. You will go paperless in terms of applications! You will be able to see your application history. Additionally, you can set up email alerts so you can be notified any time a position is posted in which you may be interested.

Why make the switch?

- **For Hiring Managers**:
  - All of your postings will be listed on one screen for ease of reference
  - Easily update the statuses of applicants that you screen/interview
  - Positions will now be posted on additional websites, casting a wider net for applicants and increasing visibility

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If you are a hiring manager, you will find that the new system has been well integrated with some current practices. We will examine what did not change with this upgrade shortly. As a hiring manager, this system will serve as your "one stop shop" for viewing all of your postings on one page; updating the status of candidates that you are screening and considering; and casting a wider net to obtain even more applicants. That is, now all of your postings will be auto posted on the job boards Indeed.com and USAjobs.gov.

Also, when you set a disposition for a candidate that you have screened or interviewed, they will automatically receive an email notification. Gone are the days of applicants not knowing where they stand within the process!

Why make the switch?

- Paper applications will no longer be accepted
- Nor will faxes or walk-ins
- **All applications must go thru the new electronic system**
- There is a new kiosk located in the HR office for job seekers to utilize as needed

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Paper applications, faxes, and walk-ins are no longer accepted, and all job seekers must go through the new system. There is a kiosk in the HR department that walk ins can use to submit an electronic application, but then again, any where that you have internet access is a place where you can browse open positions and submit an application.

What is not changing?

- The Job Description Summary and the Recruitment Form (formerly known as SAR) are still submitted to Talent Acquisitions
  - HR enters this data into BALANCEtrak to create a requisition
- Search Committees and Search Chairs are still formed as per the usual protocol
- HR still does the initial pre-screening of applicants and sends vetted individuals to the search committee
- Scheduling of interviews is still as per the norm.

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The front end of the selection process has not changed much at all. Hiring Managers still submit Job Descriptions and Recruitment Forms to Human Resources to be entered and posted in the new system. Search Committees and Search Chairs are still formed as per the usual protocol. Human Resources still prescreens applicants before they reach the Hiring Manager/Search Committee.

As we will see, the main changes for a Hiring Manager relate to how candidate information is handled and processed during the screening process.

What is not changing?

- "Hiring Manager" is a term you will hear often in this new system
- The Hiring Manager is typically a VP or supervisor with the power to update applicant statuses in BALANCEtrak
- The Search Committee Chair is still designated as per the Recruitment Form (formerly known as SAR)

And now for a word on terminology. You will hear and see the term "Hiring Manager" through out this presentation and moving forward as you work with the new system. As before, the Hiring manager is the respective VP or Supervisor. The Hiring Manager conducts second interviews and ultimately makes the final hiring decisions at the end of the screening process.

The Hiring Manager differs from the Search Committee Chair, in that the Search Committee Chair leads the front end of the search, conducting additional screening and first rounds of interviews with the rest of the committee, while the Hiring Manager is more on the back end receiving information from the Search Committee, conducting second interviews and making offers to those candidates that have been vetted by the search committee.

The Search Committee Chair and Hiring Manager will both have access to BALANCEtrak. For the purposes of this workshop, the term "Hiring Manager" term will refer to any individual that has the rights on BALANCEtrak to update applicant statuses.
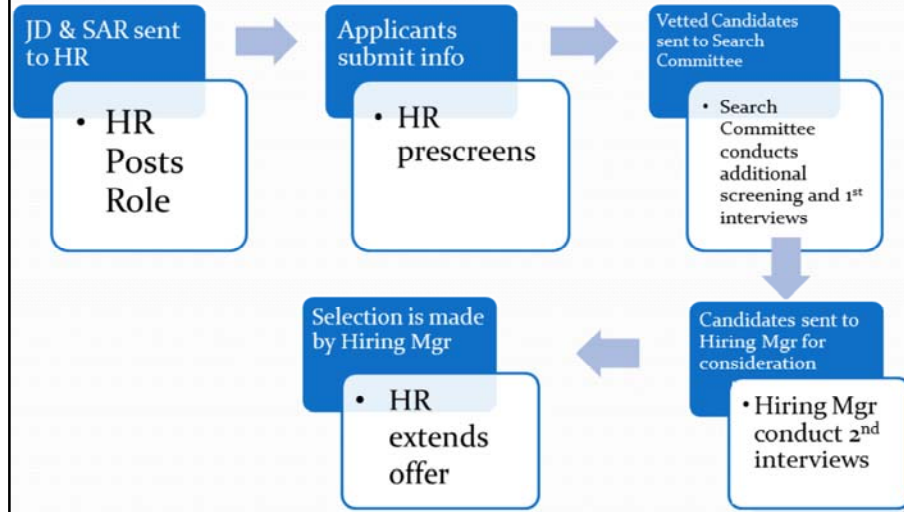
Here is a visualization of the current workflow. It is important to note that BALANCEtrak is the tool with which applicant data is collected, stored, shared, and screened. In essence, the process it self is not changing, we are just adding a tool.

What is not changing?

- Before any position can be loaded into the system, two important forms, the **Job Description Summary & the Recruitment Form (aka SAR)**, must be completed and sent to HR/Talent Acquisitions.
- The forms can be found on the O: Drive-
  - **O:\Public\HR Forms\ Talent Acquisition\HR Forms-Hiring, Personnel Actions**

As per the current protocol, the Job Description Summary and the Recruitment Form (formerly known as the SAR) must still be completed and submitted to Talent Acquisitions in the Human Resources Department. Note the location on the O: drive where you can locate these forms.

Here is the Job Description Summary. It is the first of the two forms you must complete and submit before a position can be posted. Note this form has not changed.

Here is the Recruitment Form, which is the second form you must complete and submit to get a position posted, but also to initiate Search Committee selection. Note this form has also not changed.

Remember, both of these forms must go to Talent Acquisitions. Talent Acquisitions and the Human Resources team will do the "heavy lifting" in terms of entering the position summary, knowledge, skills, abilities, minimum and preferred qualifications, and other pertinent data related to the position.
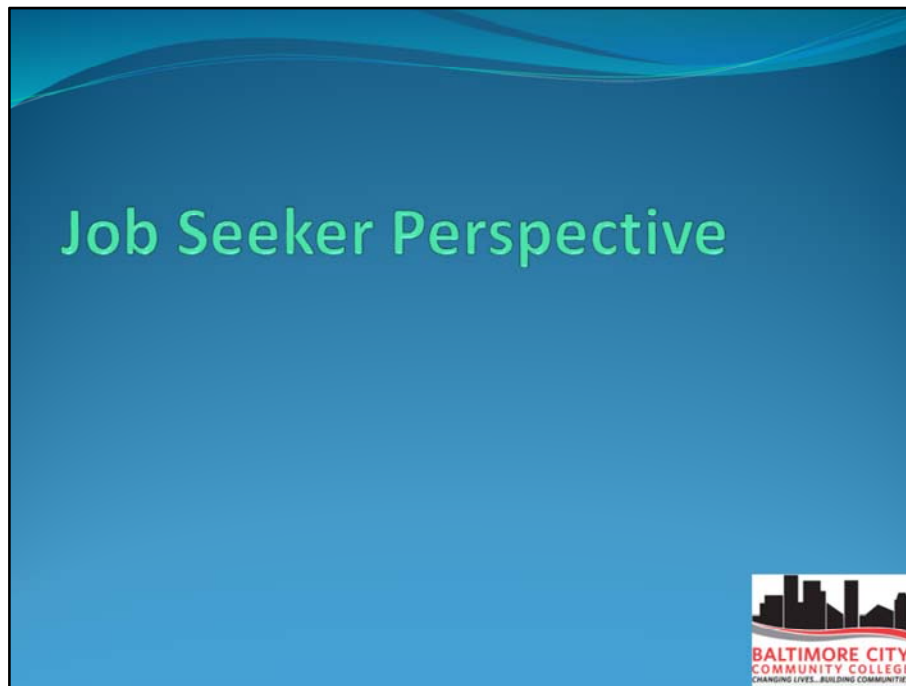
Now we shall take a closer look at what a job seeker sees when they go to search for Employment Opportunities from the BCCC website.
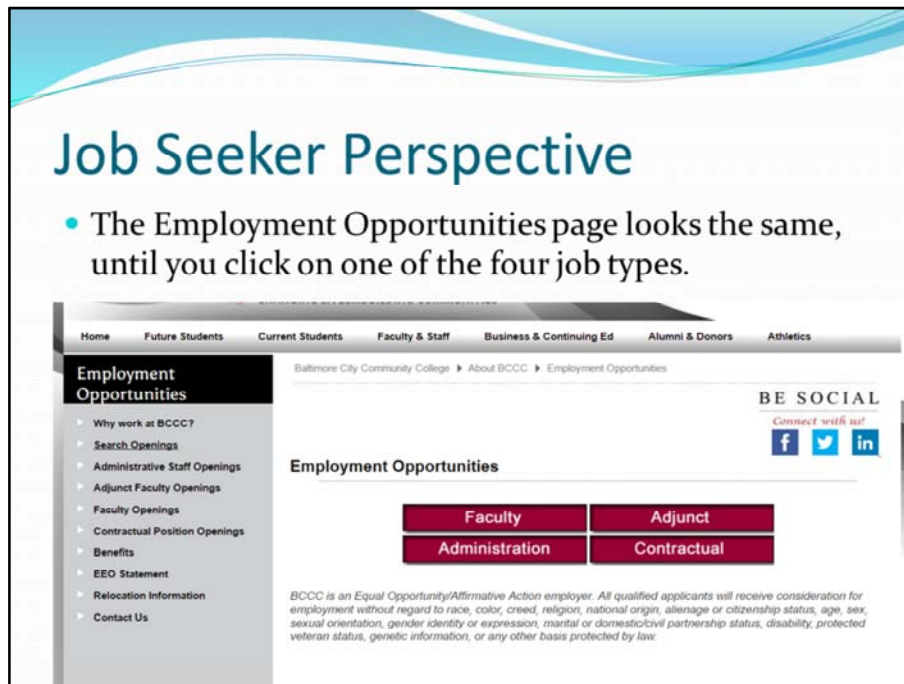
So you want to work at Baltimore City Community College? Great! Here are the simple, easy steps that you need to follow to search for and apply to the role that is right for you.

For job seekers, the first thing they will want to do is to navigate to the Employment Opportunities page. This is accomplished by starting at our home page, BCCC.edu, clicking "Employment Opportunities" on the right hand navigation column, then clicking "Search Openings" on the left hand navigation column.

This image is what a job seeker will see when they navigate to the Employment Opportunities page.   Note it has not changed. Once the job seeker clicks one of the four employment types, either Faculty, Adjunct, Administration, or Contractual, they will be directed to that respective list of openings, but in BALANCEtrak. Now the job seeker will be able to explore and utilize the new system!

This is the page that job seekers will see after they clicked the appropriate employment type from the Employment Opportunities page. Again, note they will only see a list of the type of position on which they clicked. (Faculty, Adjunct, Administration, or Contractual)

There are many features that a job seeker can utilize from this page, and we shall review them in the next few slides.

Before a job seeker can apply to any position, they must create a profile. They can do so by clicking "Log In" and following the prompts. If they go to click "Apply" and have not yet set up a profile, they will be prompted to do so. In essence, a profile is a must have!

If a job seeker already set up their profile, they will have a log in name and password, which they can enter now by clicking "Log In"

If a profile has not been created, this is what the next screen will look like. A job seeker will be prompted to enter their email address. This email address will serve as the log in name, and will also be used for ALL future correspondence from BALANCEtrak, including job alerts, automated update emails, etc. So it is imperative that a job seeker use an email that they will frequently be checking.
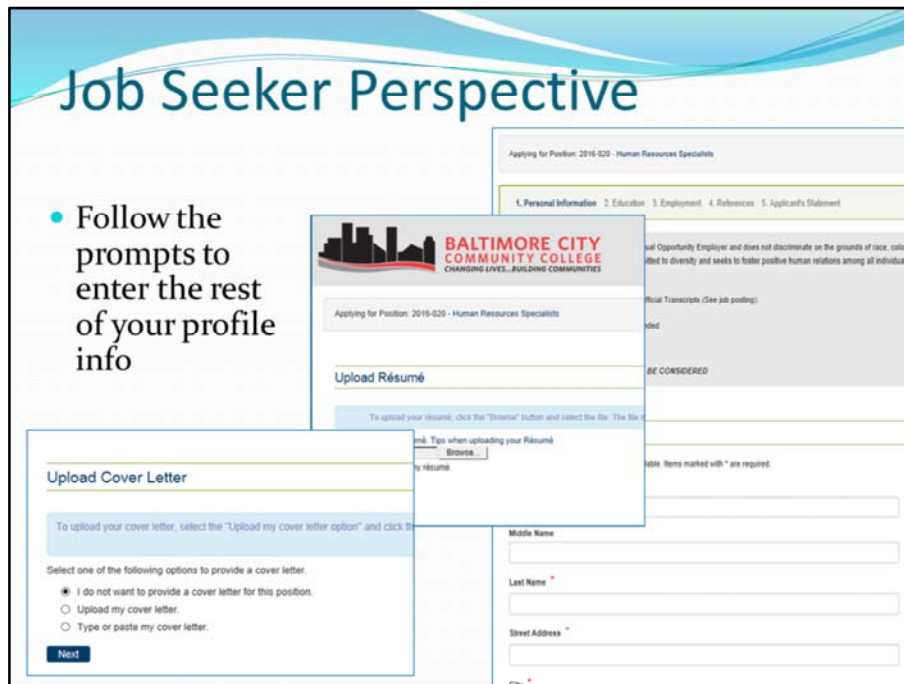
As with any job board profile creation, simply follow the prompts to complete a profile.

Regarding the cover letter: job seekers may skip the cover letter, upload a cover letter that they have on file, or type/paste a cover letter into the system. The choice is theirs, though uploading a cover letter that is already on file have may be the easiest route.

Regarding the resume, in a similar fashion to the cover letter, job seekers may upload a resume that they have on file, or they may also type/paste their resume into the system. Again, uploading a resume that is already on file may be the easiest route.

Regarding the application, follow the prompts and please note that items that have an asterisk next to them are mandatory. Job seekers will continue to enter data for the Personal Information section, the Education section, Employment section, References section, and finally the Applicant's Statement, where the job seeker will attest that all of the information that they have entered is correct.

Now that a profile has been created, a job seeker can update or change their information at any time when they log in. Here is what that screen looks like.

PROFILE – is the tab where the job seeker can update their demographic information
JOBS – is the tab where the job seeker can see what roles they have applied to, and what the status is for those positions
DOCUMENTS – is the tab where the job seeker manages such forms they have loaded into the system as their resume, cover letter(s), transcripts, etc.
SUBSCRIPTIONS – is the tab where the job seeker can manage their job alerts, specifically for what jobs that are posted do they want to receive an email alert
SECURITY- is the tab where the job seeker managers passwords and security questions

Note that at any point in time during this process a job seeker can return to the Employment Opportunities job listing page by clicking "Go to List of Available Jobs".

Back to the Employment Opportunities job listing page – now that a profile has been created, all a job seeker needs to do is to click "Apply," follow the prompts, and their pre-loaded profile will serve as an electronic application packet. This process can be repeated for as many roles as a job seeker wishes to apply.

In addition to creating a profile, logging in, and applying for roles, there are other features on this screen that a job seeker can take advantage of.

The additional features include the "Search Openings" box, "Subscribe to New Postings," and "Email"

We will take a closer look at these features in the next few slides.

A few key words is all it takes to filter the list of positions down to a short list of roles that you are seeking.

This feature comes in handy when the list is long, and/or if you have a specific position in mind.

Try a variety of key words and combos to narrow the list down to one that is manageable and has the types of roles you specifically seek.

You can always click the "void" sign to reset the search and start anew.

Subscribing to New Postings is comparable to setting up an email alert as a job seeker would do on any other job board like CareerBuilder or Monster. Once set up, the job seeker will receive an email (to the email address provided back during profile creation) any time a position is posted that matches the specifications entered here.
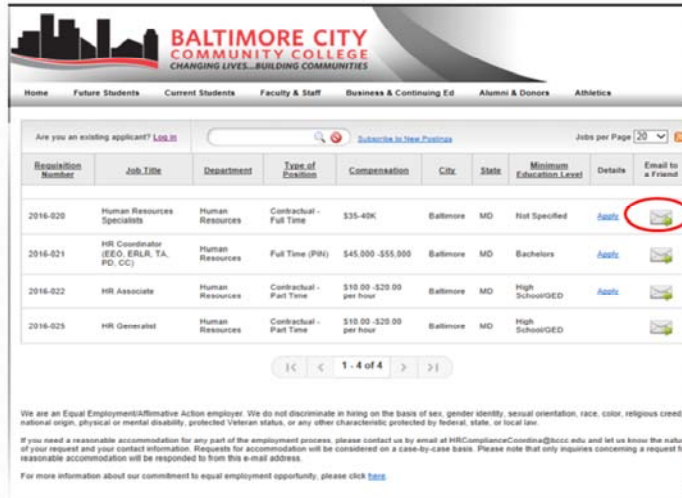
The steps are as follows:
1. Give the subscription a name.
2. Add the search key words or phrase that you want the system to look for. The system will screen the entire job description for any appearance of the key word(s) and phrases provided
3. Click the drop down box to filter by position types (Faculty, Adjunct, Administration, or Contractual)
4. If there is a specific department you are interested in, click as many or all of the boxes in this section.
5. Click "add" and you are set!

Remember, you can always manage your subscriptions in your profile management page.

The email icon to the right of a posting is how a job seeker can forward an application link to themselves or to someone else. This feature encourages referrals from job seekers and also gives a job seeker a chance to save a role for later by sending it to their inbox. Simply click the link and follow the prompts to send the position.

Hiring Manager Perspective

Now we will take a closer look at what you, the Hiring Manager, will see as you navigate the system and process applicants.

Hiring Manager Perspective

- Recall- Talent Acquisitions will prescreen applicants
- Vetted applicants will be sent to the Hiring Manager for the Search Committee's consideration
- Hiring Manager will update applicant stage and disposition as applicant undergoes the selection process

Remember, Talent Acquisitions is not only loading the job descriptions into the system for you, but is also still prescreening applicants before they are sent to your profile for your and the Search Committee's consideration. That is, rather than seeing ALL applicants to your positions when you log in, your job seeker list will be populated by individuals vetted to have the minimum qualifications for the respective role.

As a hiring manager, the bulk of the work you will do in the system is updating the applicant's job stages and dispositions.

You will see this little "edit" icon on various and multiple screens moving forward. Any time you see it next to a field, you can click it to view the particulars of that field. For example, clicking this icon will allow you to read job descriptions and read candidate details as you will see shortly.
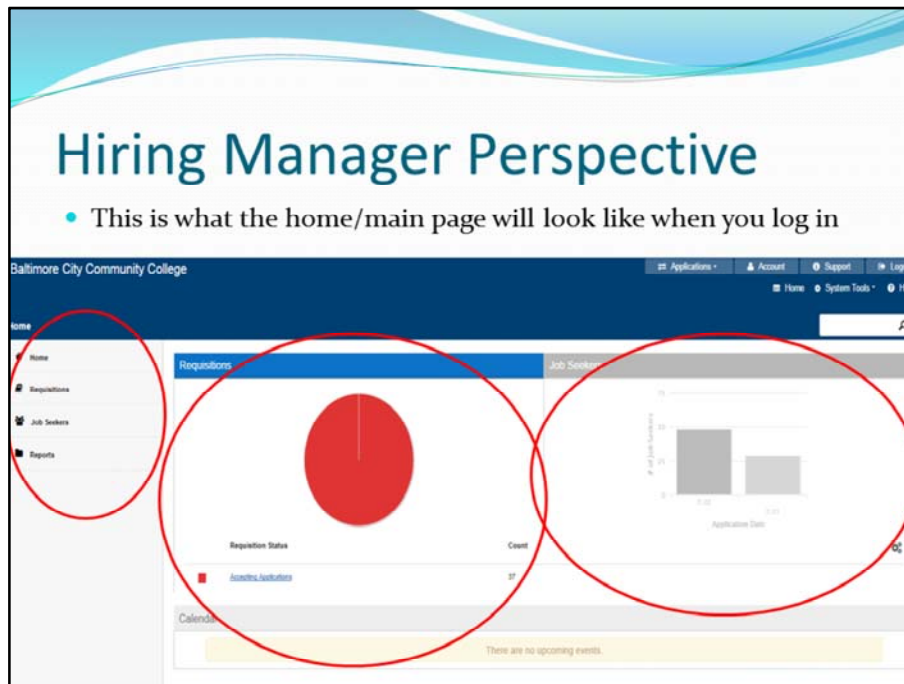
Here is what the home page will look like for Hiring Managers. The three main sections of this page are the navigation column on the extreme left, the requisitions pie chart, and the job seeker's graph.

The navigation column is something that we will take a closer look at within the next few slides. This column will be your main tool in navigating the various screens and information presented to the hiring manager regarding their postings and job seekers.

The pie chart is simply a visual demonstration of the statuses of your postings, i.e. which are currently accepting applications, which are pending approval, etc.

The job seeker graph essentially gives you a snap shot regarding applicant flow. That is, how many applicants have been applying each day.

Let's take a closer look at the navigation column and it's four components.

Clicking "Home" will bring you back to the home screen that we saw earlier, no matter what screen you may be on. If you ever get lost, go home!

Clicking "Requisitions" will bring you to the list of open postings that you have.

Clicking "Job Seekers" will bring you to the list of applicants for your consideration.

Finally, clicking "Reports" will enable you to execute any of the drill down reports that BALANCEtrak offers. These reports include executive summaries, reports about referral sources, requisitions, job seekers vs. hires, and much more.

When you click "Requisitions" on the navigation column, this is what that screen will look like. Notice the list of job openings that you have. Let's take a closer look at a line item from the list of postings.

On each job posting line entry, you can click the "edit" icon on the left if you would like to review the job posting before you start examining resumes to re-familiarize yourself with the role you are looking to fill. Clicking the number to the right will bring up the list of applicants for that posting. Remember, all applicants that you are seeing have been prescreened by Human Resources.

Here is what you will see if you click the "edit" icon to the left of the job posting line entry. This is only the top of the page; you can scroll down to see the rest of the job posting and description information. Note the particulars of the job posting are listed here, as well as the sources (i.e. external websites) to which the position is also posted.

After scrolling down, you will also see the forms that are loaded with this job posting. That is, the forms are what we mandate a job seeker to complete, specifically an application and references.

A little further down and you will reach the Job Description itself. It is a best practice to peruse the job description before you begin screening job seekers.
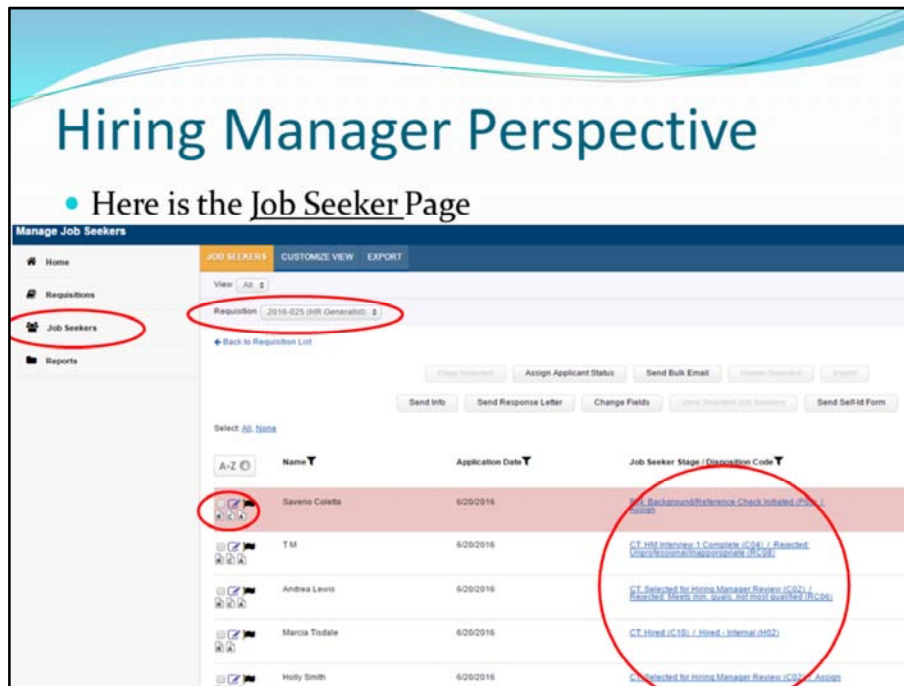
When you click "Job Seekers" from the navigation column, this is what that screen will look like. Note the list of job seekers.

You can click the "Requisition" drop down box to switch from posting to posting and to see the list of respective job seekers. You can also access a requisition's job seeker list by clicking on the "#of Job Seekers" hyper link from the requisition itself when you are reviewing the job description.

On each job seeker line entry, you will be able to view their application history, resume, cover letter, and application by clicking the respective icon on the left.

On the right of each job seeker line entry you will see the "Job Seeker Stage" and "Disposition" entries. By clicking the blue text, you will access a drop down box with all the appropriate stages and dispositions. We will take a closer look at this responsibility shortly.

Hiring Manager Perspective
- "R" – view resume
- "C" – view cover letter
- "A" – view application
- " 📝 "   Edit icon – shows all jobs to which the applicant has applied
- "Job Seeker Stage"
  - Is literally what 'stage' of the process that candidate is in
- "Disposition Code"
  - Outcome of the stage that the applicant is in

Andrea Lewis   6/20/2016   CT Selected for Hiring Manager Review (C02) / Rejected: Meets min. quals, not most qualified (RC06)

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Here is a closer look at the icons to the left of each job seeker line entry.

Clicking "R," "C," or "A" icons will pull up the job seeker's resume, cover letter, and/or application, respectively.
The "edit" icon will grant you access to additional, detailed candidate information that we will look at in our next slide.

The "Job Seeker Stage" is what stage of the selection process the candidate is currently in. As the hiring manager, your main responsibility in BALANCEtrak will be to keep these stages updated in real time, or as close to real time as you can be. The default Job Seeker Stage is "Assign"

The "Disposition Code" is the outcome of the Job Seeker Stage. As the hiring manager, you will be updating the Disposition Codes in real time as well in tandem with the Job Seeker Stages. The default Disposition Code is "Assign." The Disposition Code is usually a rejection reason as to why the job seeker's screening ended at that stage.   The only time the Disposition Code is not a rejection reason is when the Job Seeker Stage is "hired." Then the Disposition code should then also read as "hired"

We will take a closer look at the Job Seeker Stages and Disposition Codes shortly.

Hiring Manager Perspective

- In addition to showing you all the roles to which the applicant has applied, you will be able to also:
  - See Job Seeker Information
  - See documents job seeker has uploaded
  - Email job seekers to complete any forms they may have missed

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Here is a closer look at the "edit" icon from the job seeker line entry, and what it enables you to see and do when clicked. Our next slide will show you what the next screen will look like when you click this icon.

When you click that "edit" icon, this is what that next screen will look like.   On this page you can view the job seeker's contact information, the jobs to which they have applied, the forms that they've completed, documents they have uploaded, and notes history regarding the activity on the account.   You can also update the Job Seeker Stages and Disposition Codes from this page as well.

Additionally, you can utilize this page to email job seekers if part of their application is missing. In this screenshot, we see that this applicant has not yet uploaded their references. You could click the "Email to Job Seeker" link and the system will send an auto generated email template to the job seeker requesting the missing piece.
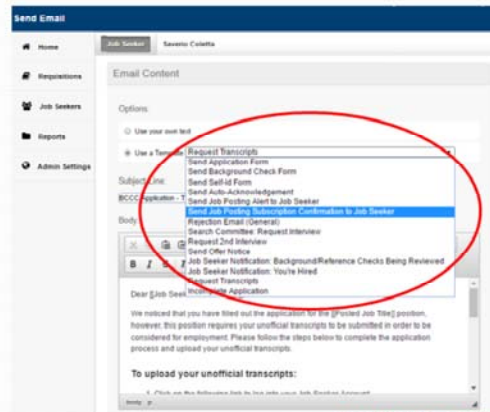
This is what the screen looks like when you go to email a job seeker. Simply click the drop down box to select the template you are seeking, scroll down to click "Preview and Send," and BALANCEtrak will complete the rest.

This is only one way to reach out to candidates via BALANCEtrak. When you update disposition codes, the system will automatically email applicants as well. This way, job seekers will always know what the status of their application is without the need for follow up or guess work on their side.

Hiring Manager Perspective

- Job Seeker Stages
  - Must update this as the applicant progresses through the process
  - Basically the Job Seeker Stage is the level of the screening process that the job seeker has reached
    - Interview 1, interview 2, reference check, offer made, etc
  - NOTE- there are stages for Contract applicants (CT) and PIN applicants (PIN)
- Disposition Codes
  - Can be left blank until a job seeker's "progress" through the process comes to an end
  - Typically is a rejection reason unless the stage is "hired"

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Here is a closer look at Job Seeker Stages and Disposition Codes. Updating these two pieces is a crucial responsibility of the hiring manager. By updating these pieces in as close to real time as possible, the system will be up to date and job seekers will receive automated emails from the system informing them of where they stand within the process.

Before any updates are made, all Job Seeker Stages and Disposition Codes start with "Assign" in blue hyperlink text. Clicking "Assign" will open a drop down box which will list all the stages and codes for you to select accordingly.

Hiring Manager Perspective

- Job Stages
  - NOTE- there are selections for Contract applicants (CT) and PIN applicants (PIN)
- Job Stages include such steps as:

PIN	Contract
HR Review	HR Review
PIN Selected for Search Committee	CT Selected for Hiring Manager
PIN Selected for Search Committee interview	CT Selected for Interview 1, 2, 3
PIN Selected for HM/VP Interview	CT interview 1,2,3 Completed
PIN Contingent Offer Extended	CT Selected for Hire
PIN Background/Reference	CT Background/Reference
PIN Hired	Ct Hired

This table provides a preview of the more common Job Seeker Stages for PIN as well as Contractual applicants. Note they are not exactly the same, but do have similar stages.

Hiring Manager Perspective

- Disposition Codes
  - Recall, the Disposition Code can be left blank until an appropriate step is reached
- Typically the dispositions are "rejection" reasons
  - Does not meet minimum qualifications
  - Poor communication
  - Dishonest on application
  - Job Seeker withdrew
  - etc
- Unless the candidate is in the "hired" stage, then the code will read as "hired"
- Selecting a code triggers applicant status emails to be sent

The Disposition Codes can be left blank until an appropriate outcome is reached from the Job Seeker Stage. That is, you can leave the blue hyperlink alone in the "Assign" stage.

Again, regarding Disposition Codes, please note they are typically rejection reasons unless the applicant's job seeker stage is "hired." Think of Disposition Codes as explanations as to 'why the applicant's screening ended where it did.' The selection of a Disposition Code will trigger an auto generated email to be sent to the applicant, as previously mentioned.

Hiring Manager Perspective

- Here is a tutorial on navigating job seekers:
- https://help.baiworks.com/video/video.aspx?time=367&title=Reviewing%20Job%20Seekers&program=TRAK&videoname=Reviewing_Job_Seekers&

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Here is a short video that will recap our Hiring Manager Perspective features and functionalities.

Back to the Home screen- the final link on the Navigation Column is "Reports." Should you be inclined to do so, you can run a variety of reports regarding referral sources, your requisitions, job seekers, and other drill down reports.
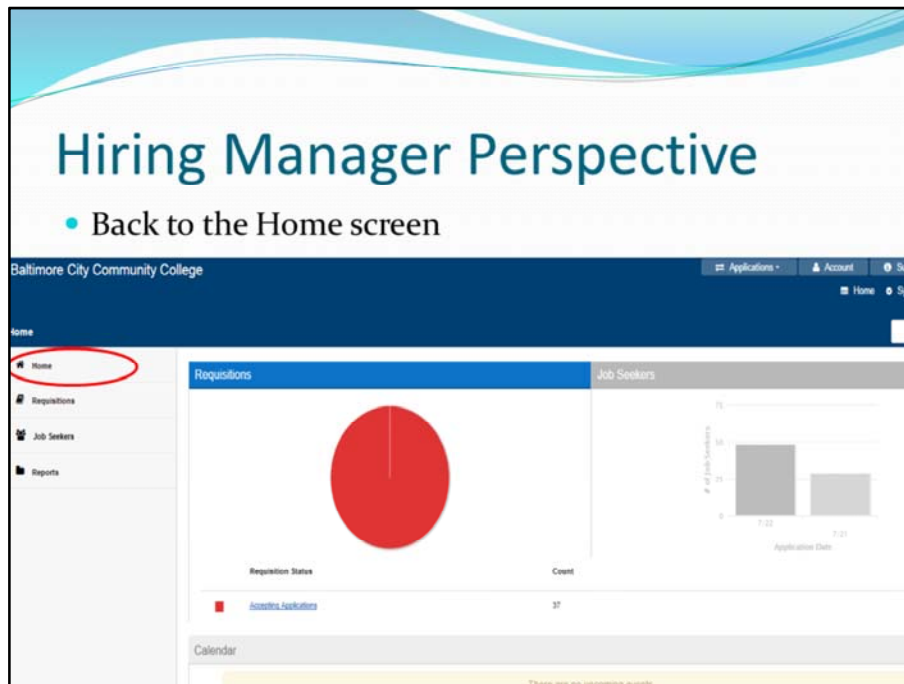
Remember, if you ever get lost clicking around BALANCEtrak, you can always click "Home" on the navigation column to return to this screen.

Frequently Asked Questions

- How does the SAR/PAR process relate to the posting process? That is, if a job description summary template is submitted to be posted as a req, when does the SAR/PAR process take place now? Before submitting the info for the req? Once it is posted?

- *Not much has changed regarding the SAR (aka Recruitment Form) and Job Description submission process. The SAR (aka Recruitment Form) is submitted with the job description as it always has been to Talent Acquisitions. The job description is entered into BALANCEtrak by HR to become a requisition. Once entered, the requisition is submitted for approval to the respective VP.*

PARs are still handled as they always have been.

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Frequently Asked Questions

- Does the new ATS system handle the SAR/PAR process internally, or are SAR/PAR handled as it is handled now?

- *It does not. The SAR (aka Recruitment Form) is still submitted as it always has been, along with the job description. The only thing that changes is that the job description is electronically converted to a requisition by HR. Again, the SAR is submitted and processed as per the norm.*

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Frequently Asked Questions

- How does the search committee integrate in all this?

- *HR will do the initial prescreening for all applicants. That is, if an applicant is missing a basic requirement, like a degree for example, HR will disqualify that person and follow up with the applicant accordingly. The search committee will thus only review applicants from Talent Acquisitions that meets minimum qualifications.*

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Frequently Asked Questions

- Is the search committee chair the hiring manager? Who is the hiring manager?

- *Not necessarily. The SAR (aka Recruitment Form) designates the Search Committee Chair. The Chair has BALANCEtrak access. The Search Committee Chair receives pre-screened applicants from HR and they conduct additional specific screening and first interviews*
- *The hiring manager is typically the supervisor or VP. This person also has BALANCEtrak access and is responsible for second rounds of interviews for candidates screened by the search chair and their team, as well as determining offers*

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Frequently Asked Questions

- Can the search committee see all the applicants?

- *The search committee chair will only receive the applicants that have not been dq'ed from prescreening by Talent Acquisitions. Only the designated hiring manager (or the chair) will have ATS access to initially see the candidates.*

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Frequently Asked Questions

- Does the search committee do all the prescreening or does HR? (i.e. an applicant must have a degree, and they do not- who bumps out that applicant?)

- *HR does the initial prescreening and emails the qualified "short list" to the search committee.*

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Frequently Asked Questions

- Are old paper applications that have been submitted prior to the go-live date being back loaded into the system or are they purged?

- *Older paper applications are still being processed as per the old system for now. They will not be back loaded into the system.*

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Contacts

- If you have additional questions or concerns, you can contact Saverio Coletta at scoletta@bccc.edu or 410-209-6004
- You may also reach out to Shelly King at sking@bccc.edu or 410-209-6055

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