How to Use the Applicant Tracking System
The following guide is intended for Hiring Managers using the PeopleFluent Applicant Tracking System (ATS).

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How to Create a New Requisition

1. Click the Requisitions menu button near the top and select Create Requisition to open the Create Requisition window.

   **Tip:** The top section (in yellow) offers options available to you if you have either created a template or a draft already.
   
   **Saved Templates (Optional):** If you have created a previous requisition template, you may select it from the drop-down list. The window will populate with the template entries that you may review and revise for the new position.
   
   **Load Draft (Optional):** If you have saved a draft requisition and wish to continue working on it, select it from the drop-down list.
Enter the Job Code (Title) for the Requisition

2. Provide the Job Code (Title):
   a. Click the Menu button to open the Job Code dialog.
   b. Enter the Job Title. You can also enter just a portion of the title or the Job Code.
   c. Click Search to retrieve all matching Job Titles.
   d. Select the desired Job Titles (even if there is only one displayed) and click OK.
   e. The ATS will auto-populate the Payroll Category, Workflow, FLSA, EEO/AAP, and Job Grade fields based off the selected Job Title.

3. Review the Posting Title and change it to the title that you would like to see used in the job posting (if different).

Enter the Requisition Information

4. Select the Department.
   a. Click the Department field’s Menu button to open the search box.
   b. Enter the department name.
   c. Click Search to retrieve all matching departments.
   d. Select the desired department (even if there is only one displayed) and click OK.
   e. The ATS will auto-populate the Department Number and School Area fields.

5. Select HR Officer from the drop-down list.
6. Select the desired Recruiter Support.
   a. Selecting No means you want to review all resumes, with no pre-screening from Staffing Services.
   b. Selecting Yes means you want some kind of Staffing Services involvement in candidate screening; a recruiter who will get in touch with you about your needs.
7. Select Reason for Position Opening from the drop-down list.
Provide other field information as appropriate to further define the position. Use the Notes field to provide any information that HR Staffing Services may need to know when posting the position or talking to candidates about the job (such as anticipated hiring range, desired start date, location, (if it is not in Cambridge) any special circumstances, etc.)

**Enter Job Details**

8. Select the **Functional Area** that best fits the job (this is how it will be categorized when applicants search on the web)

9. **Location** defaults to Cambridge, but you can change this if necessary

10. Select the **Employment Type**. Note that “Temporary” means there will be a set end date; include the length of the appointment in the job description

11. Use **Schedule**, if desired, to communicate standard hours and/or indicate flexibility.

12. Provide **Hours/Week** for an hourly paid position. Provide % Time for a salaried position.

13. **Visa Sponsorship Available**. The ‘No’ selection is intended to deter applicants without work authorization from applying to a job for which they are ineligible due to their Visa status.

14. **Job Description** and **Job Requirements** can be pasted into the fields from Word documents. Most formatting will be removed, leaving only the text. (See separate handout for guidelines on what to include in these paragraphs.)

   Please note that there is a 250 word limit for posting descriptions. If you would like to include a longer job description, you may provide a link to that description which will then be included in the posting.

**Adding Hiring Managers**

In the ATS, the term “Hiring Manager” refers to anyone who is able to see and work with a specific requisition in the system. Anyone listed as a hiring manager will be able to see candidates who apply to the requisition and move them through the workflow.

Anyone NOT listed as a hiring manager (including the person creating the Requisition) will not be able to see ANY of this information. If you want to be able to access a requisition after you’ve created it, you need to assign yourself as a Hiring Manager. This will not be done automatically.
15. Click the **Add** button to display the Select Contact search box.
16. Search by **last name**. (Just typing the first few letters is okay.)
17. Click the select box to the left of the person you wish to select. As you select people, they are added to the list at the bottom of the search box.

If you can’t find a particular person in the system, they probably don’t have an active ATS account. You can either ask to add the person’s name in the requisition’s **Notes** field or email ATS-help@mit.edu to have the person added as a hiring manager.

18. Click **OK** to accept the selected manager(s).
19. Once all hiring managers have been added, select a **primary** hiring manager (by default this will be whoever you added first). The primary hiring manager will act as the contact person for questions/concerns about the job.

20. When the Requisition is complete and you are ready to submit it to HR Staffing Services for posting and recruitment, select **Create**.

**After you click Create, HR Staffing Services (staffingservices@mit.edu) will need to be contacted for any changes.**
Send Email Notification to Assigned Hiring Manager(s) (Optional)

21. After you select Create, an email dialog box will appear allowing you to notify Hiring Managers and others. The managers assigned to the requisition will automatically be added to the To: field. You can also add the email addresses of anyone else who should be notified about the requisition (including yourself, if you would like a copy). The email will be sent from the person creating the requisition. The language in the body of the email (partially shown in the screenshot) includes a link to the requisition. Click the Send Email button to send the email. If you prefer not to send an email, select Cancel.

Review Requisition

After the requisition is created, you can view it by clicking on the requisition from the list on the left side of the screen.

Requisition Number: Creating the requisition generates a unique Requisition Number. Note how the requisition is listed by its requisition number and Posting Title, as opposed to Job Title.

Requisition Status: The requisition is created in Pending status. Once it has been reviewed and approved by Staffing Services, it will be posted on the MIT’s Career Portal and the status will change to Open.

What’s Next?

HR Staffing Services will review the details of your requisition, assign a recruiter (if indicated), clarify outstanding questions, and make any necessary edits (including modifying it to comply with the 250-word posting limit) before posting.

If you need something changed, contact staffingservices@mit.edu.
How to Find and View a Requisition

A list of the requisitions that you are assigned to can be seen on the left side of the ATS.

**Requisition Filter (1)** - Used to view requisitions matching a specific criteria, such as all "Open" requisitions. Click the green plus sign to create a custom filter. (For more info, see How to Create a Req Filter found at [https://hr.mit.edu/managers/hiring/ats](https://hr.mit.edu/managers/hiring/ats))

**Requisition Status (2)** - The requisition status is indicated by the folder color.

**Posted Jobs (3)** - The pushpin icon on top of the folder indicates that the requisition is currently posted to MIT's Career Portal.

**Number of Applicants (4)** - The blue number in parentheses indicates the total number of applicants in this requisition.

**Recent Applicants (5)** - The green number in parentheses indicates the number of applicants who have applied within the past 24 hours.

**Requisition Information (6)** - Click on the Posting Title to view the requisition information, job details and contact information.

**Requisition Quick Find (7)** – To look for a requisition by the requisition ID (5 digit number), click the Requisitions menu and choose Requisition Quick Find.
How to View Candidates

Candidates will appear in the **Inbox** folder once they apply to a position.

Click on the + next to the Inbox folder to expand the list of candidates in the requisition list. (See screenshot)

Click on the Inbox (or any other folder), and the **Candidate List** will appear containing the full list of applicants who are currently at that step.

### Configurable Layouts
Found at the top right hand corner, you have the option to change your layout.

### Candidate List
The Candidate List provides a summary view of the candidates. The table can be sorted and configured to display additional information.

### Act on Multiple Candidates at Once (1)
Using the checkboxes, you can drag multiple candidates to a new folder or perform various actions on candidates at the same time.

### Add/Remove Columns and Filter Candidates (2)
– To open the menu, click on the three stacked dots

### Perform Actions on Candidates (3)

- **Email Selected Resume/CVs** – Opens a draft email with the resumes belonging to the checked off candidates attached to the email.
- **Email Candidates** – Opens a draft email with the checked off candidates in the Bcc field. The email will be sent from your email address, and not a generic MIT Staffing address.
- **Preview and Print Selected Resume/CVs** – Opens a new window displaying the checked off candidates’ resumes and cover letters allowing you to print or save the documents to PDF.

<table>
<thead>
<tr>
<th>Candidate Source Icons</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>External applicant</strong></td>
</tr>
<tr>
<td><strong>Internal applicant</strong></td>
</tr>
<tr>
<td><strong>Self-identified as an employee referral</strong></td>
</tr>
</tbody>
</table>
View Candidate Details

Click on a candidate’s name to view the details of their application. Each tab contains different data.

**Resume (1)** This tab shows the applicant’s Cover Letter (if the applicant submitted one) and the Resume. In some cases, a resume’s text or formatting will look strange and/or have multiple misspellings due to an intermittent system issue with converting the original document to HTML. To view the original resume that was uploaded, click the down-pointing arrow icon (see screenshot). The original cover letter is only available if the applicant combined it in the same file used for the resume.

**Candidate Info (2)** This tab shows current contact information and work eligibility status. (The ATS will not prevent applicants from applying based on how they answer the eligibility and sponsorship questions.) For internal applicants, the current department and job title will be listed at the on this page.

**Profile (3)** This tab shows an applicant’s sourcing information, and their work/education history

Find a Candidate

To search for a candidate, choose Candidates from the top menu and select **Candidate Quick Find**.
### How to Move Candidates Through the Hiring Process

Each requisition contains an **Inbox** and nine additional folders (or “steps”) into which candidates may be placed. These folders allow you to easily see where each candidate is in the hiring process.

Each folder (or “step”) is associated with a particular set of activities, as outlined below.

<table>
<thead>
<tr>
<th>Folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbox</td>
<td>Candidates are automatically placed here when they submit their application</td>
</tr>
<tr>
<td>Applicant Review</td>
<td>Candidates whose resumes have been reviewed for future consideration</td>
</tr>
<tr>
<td>Phone Interview</td>
<td>Candidates to be phone screened, either locally or by central HR</td>
</tr>
<tr>
<td>Interview</td>
<td>Candidates to be interviewed in person (may stay here for many rounds of interviews)</td>
</tr>
<tr>
<td>Not Selected</td>
<td>Candidates not selected at any step prior to the offer stage. Includes those who were not considered, those who withdrew before receiving an offer, and those who did not make it to the finalist stage. (The ATS will ask for a disposition reason.)</td>
</tr>
<tr>
<td>Finalist - Not Selected</td>
<td>Very strong candidates who did not receive an offer but should be considered for similar positions. (The ATS will automatically assign a disposition reason.)</td>
</tr>
<tr>
<td>Offer</td>
<td>Candidate offered the job. The ATS will ask for a starting salary. (Use of this functionality is optional. It is recorded in the ATS only and once entered, not visible to the hiring managers.) The ATS will also generate an optional offer letter in Word that may be adjusted to fit your needs. It is not meant to replace the welcome/offer letter that is sent by HR once the hire information is entered into SAP via APR.</td>
</tr>
<tr>
<td>Hired</td>
<td>Candidate accepted the offer (The ATS will ask for a start date. An actual or estimated start date may be entered if you wish. The actual start date will still need to be entered into SAP.). The job posting will automatically be removed from the website and the status will be changed to filled.</td>
</tr>
<tr>
<td>Not Hired</td>
<td>Candidate received an offer but was not hired. (The ATS will ask for a disposition reason)</td>
</tr>
<tr>
<td>Applicant Communication</td>
<td>Dispositioned applicants to be notified of their status (The ATS will offer two optional draft emails to send.)</td>
</tr>
</tbody>
</table>
To make updates to a candidate’s status, click on the candidate’s name or select multiple candidates from the candidate list and drag them into the appropriate folder. (See “Act on Multiple Candidates at Once” in the 3 – View Candidates guide found at https://hr.mit.edu/managers/hiring/ats).

All applicants should move through the ATS steps in order, bypassing any steps that don’t apply.

IMPORTANT NOTE: If a candidate was moved to the incorrect folder, do not drag the candidate back to the previous folder – just right click the candidate’s name and choose Undo Last Move from the menu. Do not drag the candidate back to the previous folder. This ensures that the candidate’s history is correct, will lead to accurate reporting, and avoids issues in the case of an audit.

**How to Disposition Candidates**

All candidates not hired for a job must be moved to either the Not Selected, Finalist – Not Selected, or Not Hired folder and assigned a Disposition Reason explaining why they weren’t selected.

1. Drag the candidate that you are not hiring to one of the following folders highlighted below.

<table>
<thead>
<tr>
<th>Folder</th>
<th>When to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Hired</td>
<td>For candidates who received an offer but who were not hired.</td>
</tr>
</tbody>
</table>
| Finalist - Not Selected| For very strong candidates who did not receive an offer but should be recruited for similar positions.  
Note: The disposition reason of “Finalist – Not Selected” is automatically chosen for this folder.  
*Note: If a very strong candidate withdrew before receiving an offer, use Not Selected instead.* |
| Not Selected          | For all other candidates *(Most commonly used folder)*. Includes those who were not considered, those who withdrew before receiving an offer, and those who did not make it to the finalist stage. |
2. A pop-up window will appear when you drag your candidate(s) to one of the three folders above. Choose the most appropriate disposition reason. The chart below will help with determining the most appropriate disposition reason. Click “OK” when done.

NOTE: Disposition reasons were updated in April 2021.

Some candidates must be excluded from affirmative action reporting, according to government regulations. Examples of why they’re excluded include that they lack relevant experience, they withdrew from the process without having received an offer, or so many applications were received that theirs wasn’t even reviewed. If the disposition reason you select is appended with “Excluded from Affirm Action Plan”, that candidate will not be counted in your area’s Affirmative Action analysis. Please select disposition reasons carefully.

<table>
<thead>
<tr>
<th>Reason Category</th>
<th>When to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Considered</td>
<td>The candidate’s application was not reviewed</td>
</tr>
<tr>
<td>Not Qualified</td>
<td>The candidate doesn’t meet the minimum qualifications as <em>detailed in the job description</em></td>
</tr>
<tr>
<td>Not Selected</td>
<td>The candidate met minimum qualifications, but was not chosen for the job</td>
</tr>
<tr>
<td>Withdrew</td>
<td>The candidate chose not to pursue the job (and had not yet received an offer)</td>
</tr>
<tr>
<td>Offer Declined</td>
<td>Candidate was made an offer (verbal and/or written) but did not accept</td>
</tr>
</tbody>
</table>

According to the Office of Federal Contract Compliance Programs (OFCCP), to be included in Affirmative Action reporting, a candidate must express interest in, be considered, and possess basic qualifications for the position and not withdraw from consideration before receiving an offer. More information is available on the US Department of Labor’s website, found [here](https://www.dol.gov/ofccp).
All non-hired candidates **must be** dispositioned before the requisition is filled. If not, system-generated emails will be sent to the primary hiring manager of any filled requisition(s) that contain non-dispositioned candidates. The emails will be repeatedly sent until all candidates are dispositioned.

IMPORTANT NOTE: If the incorrect disposition reason was chosen, right click the candidate’s name and choose **Undo Last Move** from the menu. This will move the candidate back to the previous folder where you can disposition the candidate again. (The “Undo Last Move” is candidate-specific, can be applied to any candidate and can be used multiple times to move a candidate back through all of their previous steps.)

3. You can anonymously notify candidates via email that they were not selected.

**How to Notify Dispositioned Candidates**

You can notify candidates via email that they were not selected or that a position has been filled by using the **Applicant Communication** folder.

1. To launch the email template, drag one or more candidates from **Not Selected** into the **Applicant Communication** folder at the bottom.

   NOTE: You can drag multiple candidates at once by holding down the “Ctrl” key and selecting multiple names under the folder or by clicking the “Not Selected” folder and checking the checkboxes in the list on the right side. Once checked, drag from anywhere in the light blue rows into the **Applicant Communication** folder.
2. A dialog box will prompt you to choose an email template. See the box below for the different messaging. If you dragged multiple candidates, you will have the option to send the same email to all the candidates that you dragged over. To do this, click the “Apply to all candidates?” check box.

3. A draft of the email will now appear (see next page). The name(s) of the selected candidate(s) will automatically appear in the Bcc field. Avoid using the To field since any email addresses entered here will be seen by other candidates.

The email is sent from “MIT Staffing Services”, noreply@mit.edu. The candidate WILL NOT see your name or email address in the email, unless you include it in your message.

4. Select Email when you are ready to send the email or select Cancel if you decide not to send the email.

IMPORTANT NOTE: If you click Cancel, the candidates will stay in this folder but no email will be sent.

If you still want to send an email, right click on each of the candidate’s name and choose Undo Last Move to revert each person to the prior folder. You may then re-drag each candidate to Applicant Communication when you are ready to send the message. (Do not drag the candidate back to the prior folder since this could lead to inaccuracies in reporting.)
How to Use the Offer Folder

Once you are ready to make an offer, move the candidate to the **Offer** folder. This folder can also be used to draft an offer letter. (Use of this offer letter is optional.)

1. Move the candidate to the **Offer** folder. You will be prompted to enter the candidate’s Annual Salary or Hourly Rate. These are optional fields and need only be completed if you are using the ATS to draft an offer letter. Otherwise, click the **Cancel** button. If you are drafting an offer letter, enter the amount exactly as it should appear in the letter, complete with a dollar sign and commas. Click **OK**.

**To...** Leave blank. (Any email addresses entered here will be seen by other candidates)

**BCC...** Candidate name(s) will automatically appear here. Keep them there so you don’t expose their email addresses to each other.

**NOTE:** The email is sent from “MIT Staffing Services” noreply@mit.edu. The candidate WILL NOT see your name or email address in the email.

Click **Email** to send the email(s).

If you click **Cancel**, the candidates will stay in this folder but **no email will be sent**. Use the **Undo Last Move** button to revert each person to the prior folder, and re-drag them to Applicant Communication when you are ready to send the message.

Again, be sure to use **Undo Last Move** rather than drag the candidates to the prior folder.
2. You will then be prompted to select an offer letter template (exempt or nonexempt). Again, if you choose not to draft an offer letter, click the **Cancel** button.

If you selected an offer letter template, the letter template will open in Microsoft Word. Edit and save the letter in Word.

Be sure to proofread the content of the letter, add your contact information, and cc yourself on the email as the ATS does not store offer letters.

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**How to Use the Hired Folder**

Once a candidate accepts an offer and you have agreed on a start date, move them to the **Hired** folder. This automatically sets the job status to **Filled** and removes the job posting.

If you would like a job posting removed before filling a job, contact ats-help@mit.edu.
The ATS will prompt you to choose a Start Date (this is optional). You will also see a reminder to disposition and communicate with all candidates.

All non-hired candidates **must be** dispositioned before the requisition is filled. If not, a system-generated reminder emails will be sent to the primary hiring manager for any filled requisitions that contain non-dispositioned candidates.

**Finalists:** Move finalists to the **Finalist – Not Selected** folder and let them know they were not selected for the job. Keeping these candidates in the Finalist – Not Selected folder will allow you to find them at a later date should another suitable position open up.

**Not Selected Candidates:** Make sure that all non-selected candidates are in the Applicant Communication folder and that you have sent them the appropriate communications.

**Important Final Step**
Submit your SAP new hire transaction. The ATS DOES NOT transfer information to SAP, so the current method of submitting HR transactions is required in order to trigger the employee’s system access, and the New Hire Letter from HR.

**How to Create Additional Requisition Filters**
Requisition Filters allow you to use search criteria to decrease the number of requisitions shown in the Workflow pane on the left side of the ATS. Requisition filters also allow you to specify the order in which your requisitions appear in the Workflow pane.

1. Click on the plus (+) sign under the requisitions tab.

2. Name the folder and mark it Private.

3. Select the criteria you’d like to use, e.g., department, by clicking on the pulldown arrow for the Criteria field and then click on the menu icon next to the Selected Values field to choose the appropriate value.

You may choose more than one item from the selected values list by clicking on the control key and selecting additional values. You may also include additional criteria by clicking on the Add key.
4. Select how you’d like to sort the information in the folder from the “Sorts and Operator fields.

5. Click Save.

   NOTE: To edit or delete any Requisition Filters that you created, select the filter from the pull-down menu and click on the pencil icon or the red X icon, respectively.

How to Communicate with Candidates using ATS Email Templates

The following guide is intended for Hiring Managers using the PeopleFluent Applicant Tracking System (ATS) who would like to create custom email templates.

ATS users can create email templates for sending routine messages to candidate(s). Commonly used fields, such as Req ID and Candidate Name, can be dynamically included into the email.

NOTE: This feature should not be used if the sender wishes to correspond anonymously. Emails sent from personal email templates, outlined below, will be sent from your MIT email address.

If you are looking to anonymously notify a candidate that they were not chosen for a position, the “Not Selected” and “Position Filled” email templates used in the “Applicant Communication” ATS folder are sent from “MIT Staffing Services (noreply@mit.edu)”. More information can be found in the How to Notify Dispositioned Candidates guide at https://hr.mit.edu/managers/hiring/ats.

Create an Email Template in the ATS

1. Go to Candidates > Manage Email Templates. The Manage Email Templates dialog box appears.
2. Enter an email template name.

3. Enter an email Subject and enter the text that will be displayed in the email message.

4. If you want specific data about a requisition or candidate to dynamically appear in the email template, do the following:
   a. Click Insert Variable Field.
   b. Select a variable field from the drop-down lists under Commonly Used Fields or Additional Fields.
   c. Click Insert Variable Field. (The numbered steps can be seen in the screenshot below)
5. To add an image to the email template (e.g., MIT logo), click the **Insert Image** icon in the style formatting area (see screenshot above) and do the following:
   a. Click **Upload** to browse images in your local directory and upload the desired image. You cannot upload a file that is larger than 2MB.
   b. Select the image from the Insert Images dialog box. If desired, you can change the size of the image by entering values in the **Width (px)** and **Height (px)** fields.
   c. (Optional) In the **Alternate Text** field, enter text that appears when the image cannot be displayed (for example, some email applications disable images). The alternate text should be a description of the image.
   d. Click **Insert**. The image appears in the Manage Email Templates dialog box.

6. Click **Save**.

**Using Email Templates in the ATS**

1. Select a candidate to send an email message to by doing one of the following:
   a. Navigate to a requisition folder, right-click on the candidate name and select **Email Candidate**
   b. Navigate to a requisition folder to display the Candidate List. Select the check box next to the candidate, click **Actions**, and then select **Email Candidates** from the drop-down list
   c. From the Candidate Profile, click **Actions** and then select **Email Candidates** from the drop-down list

2. In the Email dialog box, the From field is automatically populated with the sender’s email address. This is informational and cannot be changed or modified in any way.
3. When the email is sent to one candidate, the candidate’s email address is visible in the To field. To add additional recipients the email message, click the To, CC, or BCC button.

4. Select an existing email template from the Saved Templates drop-down list. (See “Create an Email Template in the ATS” to learn how to create a Saved Template.) When a template is selected, the email subject and the email body are populated.

5. If desired, add an attachment.

6. Click Spell Check to confirm spelling in the text fields.

7. Click Send Email to send the message. The green text box shown to the right should now appear, confirming that the email was sent successfully.

8. The variable fields will be auto populated in the resulting email. If “Preferred Name” field was not used by the candidate, you can insert “First Name.” NOTE: Templates can only be seen by the template creator.

Get Help

More information https://hr.mit.edu/managers/hiring/ats
Applicant Tracking System Tech Support ATS-Help@mit.edu
Staffing Assistance StaffingServices@mit.edu