Talent Acquisition Process and Applicant Tracking System (ATS), powered by Workable

Hiring Managers User Guide

February 2025

Welcome to Talent Acquisition Process and ATS | Hiring Managers User Guide

The Talent Acquisition team is excited to partner with you on the recruiting process via our Applicant Tracking System (ATS), powered by Workable. This online tool replaces our manual recruiting processes and incorporates an automated process for hiring managers.

Moving our recruiting process to a system promises to provide improved capability alongside a user-friendly, measurable experience. This process replaces our manual resume review, interviewing, evaluations, and offer details review processes and incorporates an automated process for Hiring Managers. It ensures a fair, equitable recruiting process for all candidates and removes potential for bias. The Hiring Managers process allows HR and the Hiring Managers to partner with each other and Interviewers to steward candidates effectively and efficiently through the recruiting process and ensure a sound hire.

An Important Reminder on Hiring Manager Service Level Agreements

Hiring Managers are to attend the position **Intake Meeting and Biweekly Recruiting Touch Base Meetings** with the Recruiter. This is to ensure a timely recruitment process, communication, and collaboration within the recruiting process.

Hiring Managers are to review the **Weekly Recruiting Update Emails** throughout the full cycle recruitment process. This is to ensure accuracy and alignment of the process.

Hiring Managers are to align recruitment efforts to the **Recruiting Process Timeline** established and communicated by the Recruiter.

The Service Level Agreement for response times to any requests from Talent Acquisition, including but not limited to, interview invitations within the ATS, is **2 business days**. If you need more time, please contact the Recruiter to request an extension. Consistent, timely responses are critical to ensuring acceptable time to hire/fill metrics and a good candidate experience.

The Service Level Agreement to submit your Interview Evaluation in the system **is no later than 24 hours** from the interview's completion. It is also required to keep your feedback from your interviews confidential until the Interview Debrief Meeting when all interviews are to share their individually collected interview data. For risk management purposes, all interview evaluations must be submitted in the ATS prior to an offer extension.

In this user guide, you'll find all steps needed to successfully partner with talent acquisition to recruit and hire the right talent.

Table of Contents

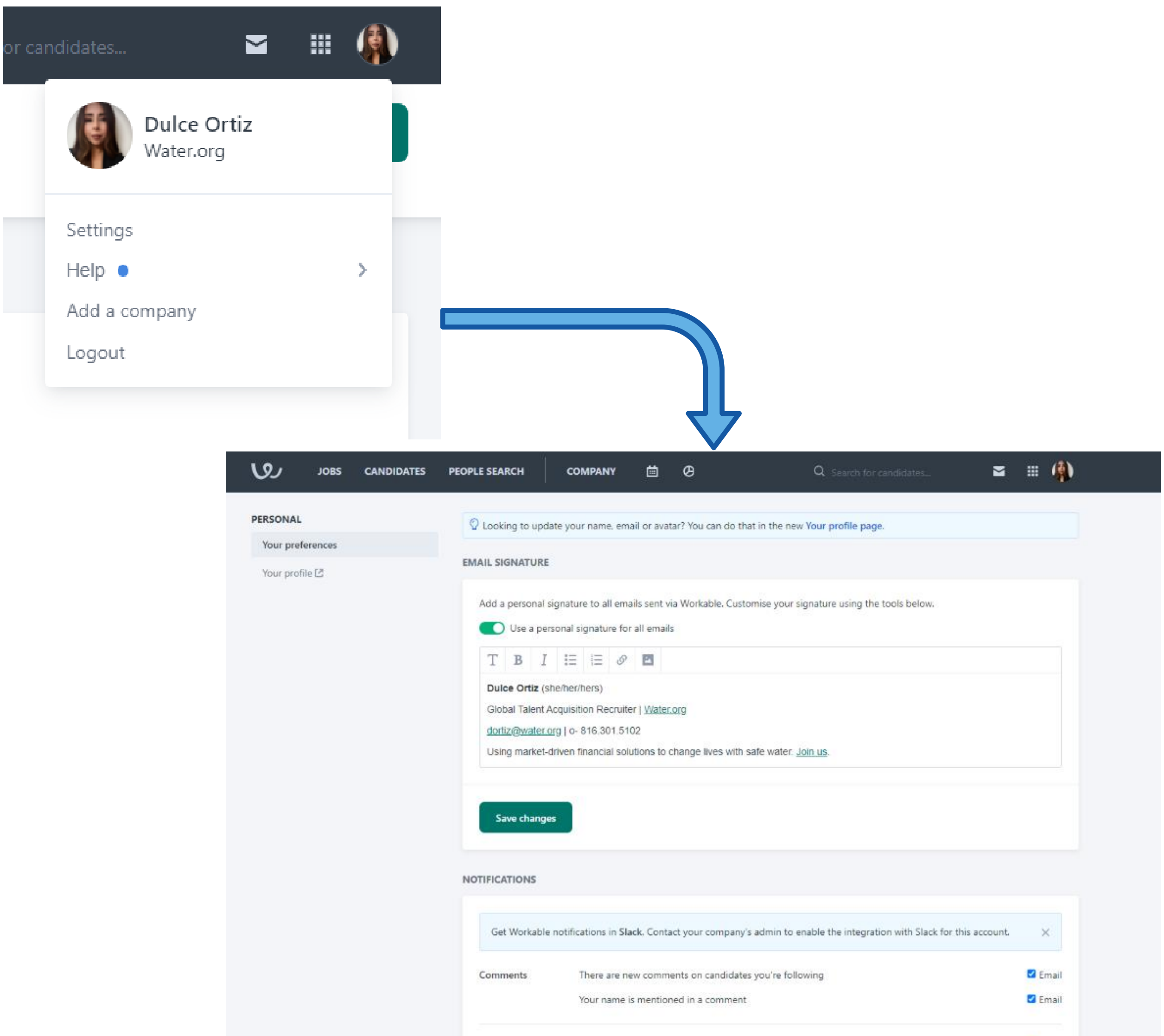
ATS, powered by Workable Account Setup

ATS, powered by Workable, is accessible via single sign-on; simply click the link below and bookmark for quick access. ATS, powered by Workable: https://water-dot-o-rg.workable.com/signin.

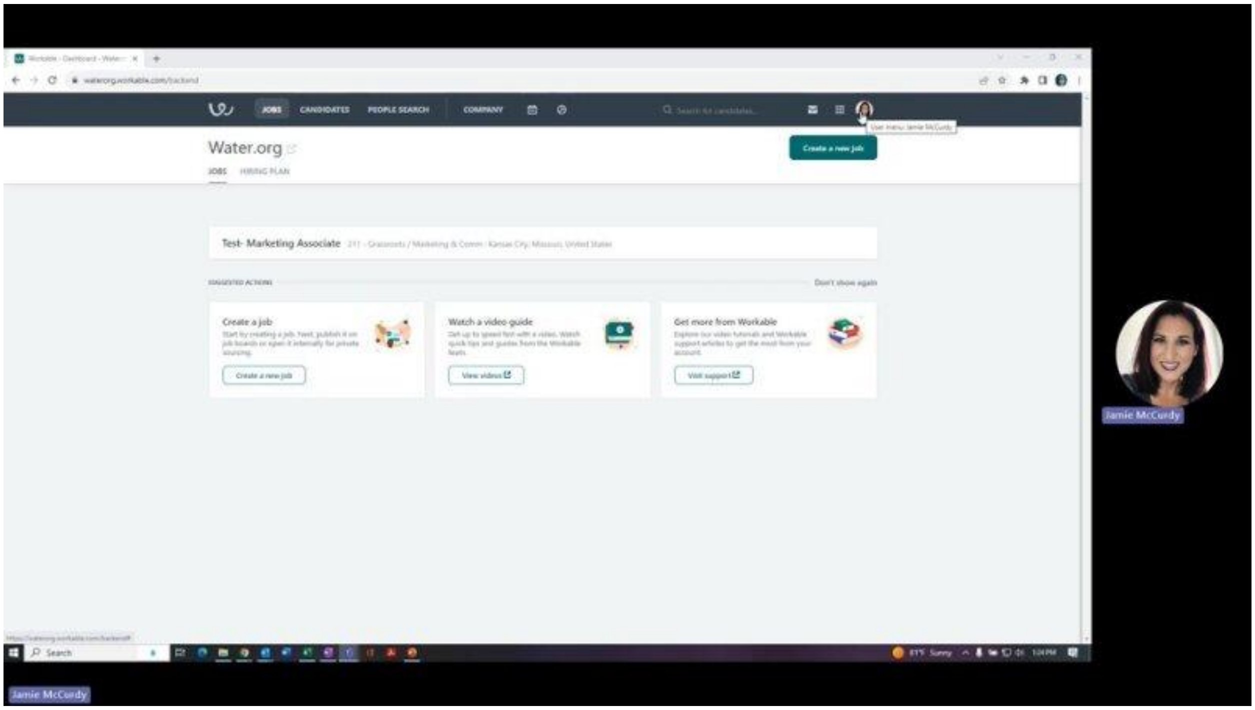
If you have any technical issues, please clear your cache and cookies, close your browser completely, reopen and try again. If you continue to have technical issues, please contact help@water.org for assistance. Please contact recruiting@water.org with any questions.

Your ATS account Profile and Preferences are accessible via the small circle at the top-right of your homepage. Click **Settings**, then visit the **Personal** section in the menu on the left side of your screen.

The **Profile** and **Preferences** provides access to your image, email signature, notifications settings, interview availability, name, job title, time zone, and credentials (see more below).



Video Resource: Click on the Tutorial Video below for an overview of the **Workable Account Login and Setup process.**



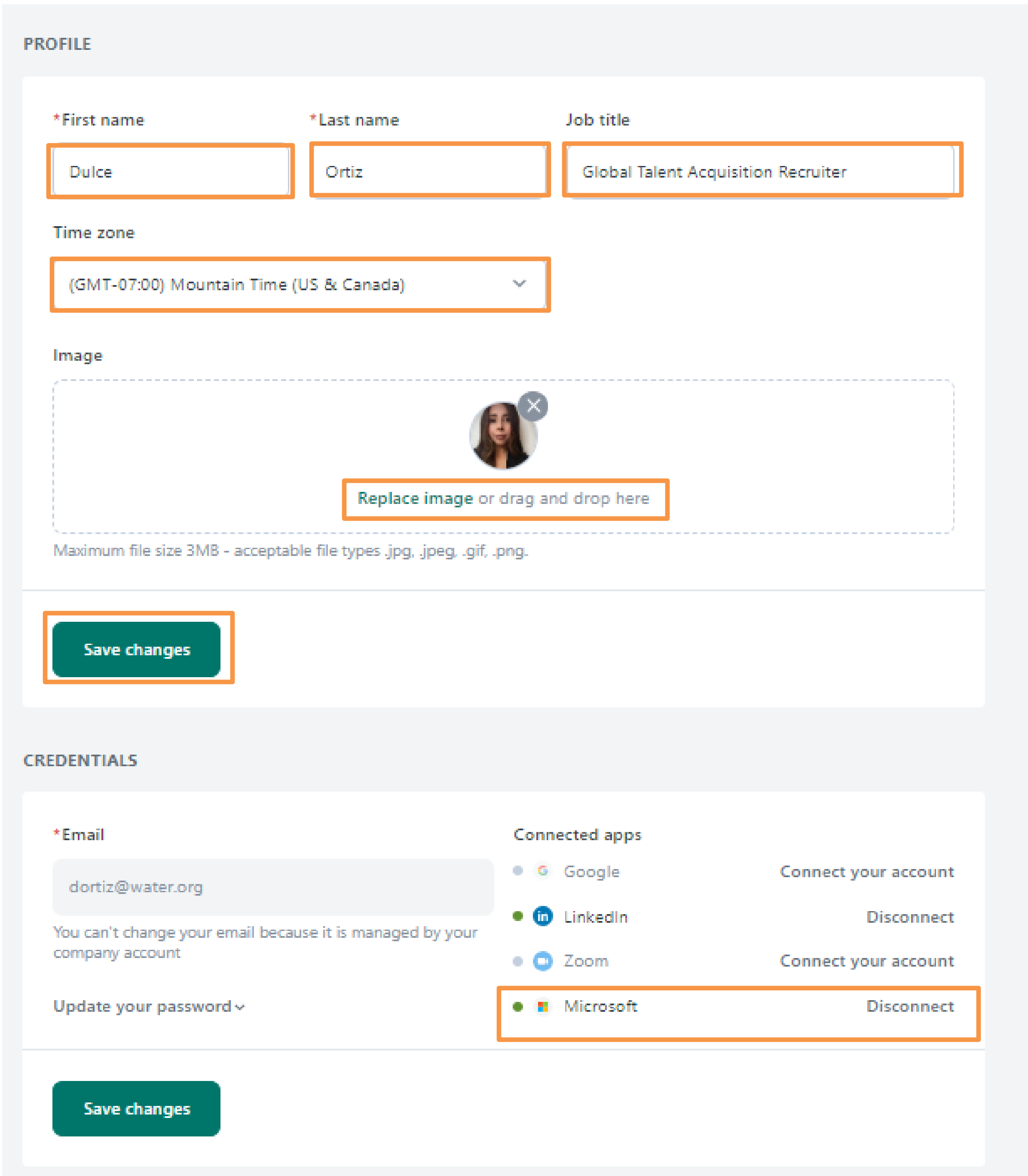
Note: *Video will open in another window on your screen. Once you've viewed the video, please return to this document to complete your overview.*

Updating Your Profile Features

From the **Persona**l menu, select **Your Profile**, then within the Profile box, add your first name, last name, job title, time zone, and image, then click Save Changes.

In the Credentials box, your email has been auto populated. On the right side of the box, confirm your Outlook account is connected. To do this, look at the Connected apps > Microsoft. If not yet connected, click on this integration link and follow the steps: [Microsoft and Workable Integration.](#)

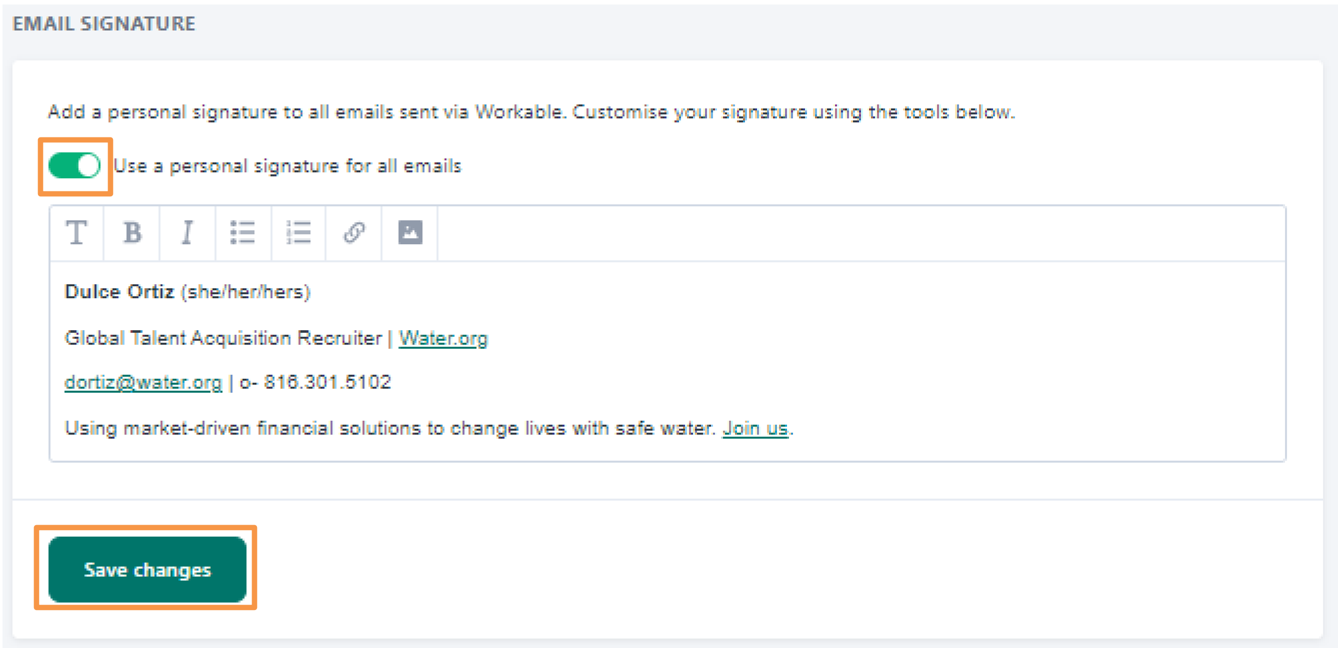
*Note: If **Disconnect** is listed to the right of Microsoft in your Connected Apps, the above step is complete.*



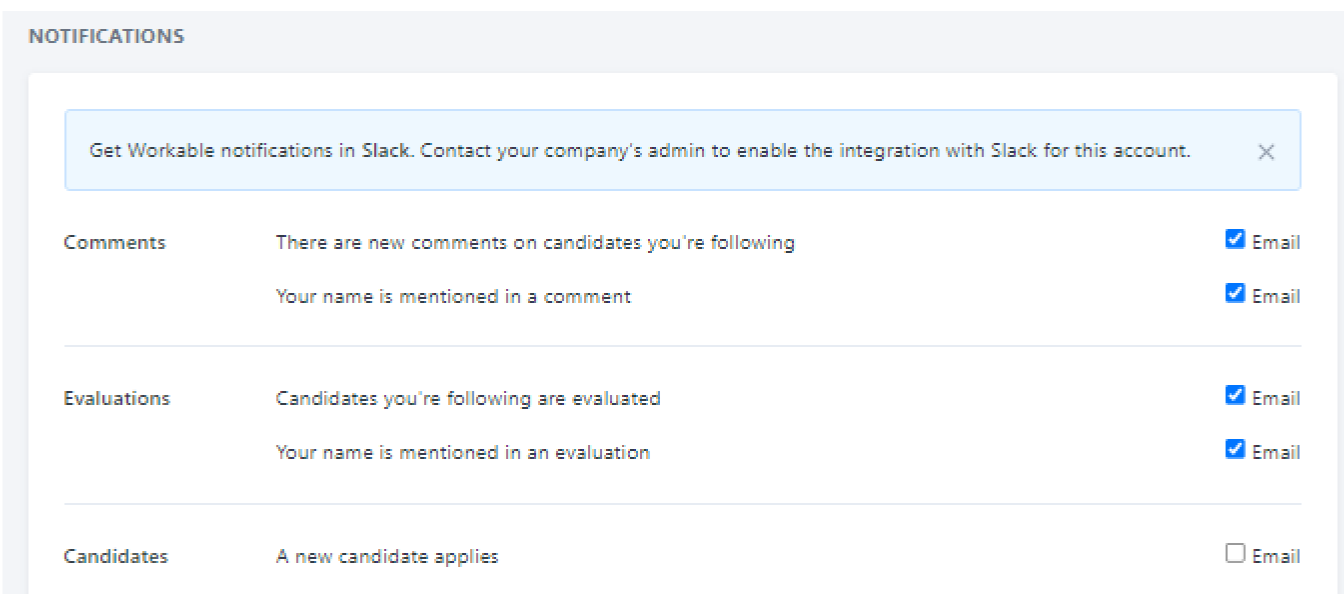
Updating Your Preferences Features

From the **Personal** menu, select **Your Preferences**.

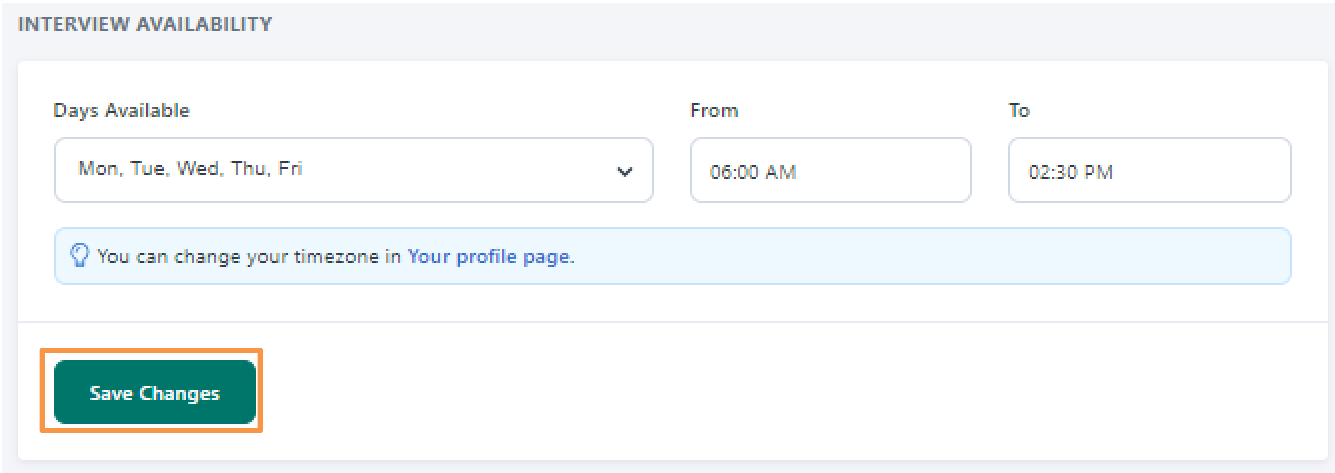
In the Email Signature box, add your Water.org email signature, ensuring the toggle switch is set to “Use a personal signature for all emails”. Click Save changes when complete.



Next review and update your notifications settings based on your preferences. Click Save changes when complete.



Finally, in the Interview Availability box, select the days and times you are generally available for interviews. The ATS system will confirm your availability for an interview during these times via an integration with Outlook. Click Save Changes when complete.



Note: In addition to setting your Interview Availability prefrences in the ATS, it is critical that your Outlook calendar reflects your availbility. If you expect to be out of the office or otherwise unavailable for an interview, please ensure the time is blocked in your Outlook calendar.

Talent Acquisition Hiring Managers Process

The Talent Acquisition Process is a partnership and relys on the successful completion of the steps below, within the established timeframes. Review the process in its entirety here and bookmark these pages of the user guide as a resource. The remainder of the user guide will provide additional guidance to complete each of the process steps.

Within 5 business days of receiving an email notification that your requisition is approved in Workable, you will receive an Outlook calendar invitation for the position Intake Meeting from your Recruiter.

Step 1: Accept the Outlook calendar invitation for the position Intake Meeting.

Step 2: Attend and participate in the position Intake Meeting. You will need to establish your Interview Team and receive Interview Guides for the position for the Intake Meeting so you can inform the Recruiter of the structure and content. Keep in mind the following:

- There is a Maximum of four rounds of interviews. You are not required to have four rounds, but two to three rounds are recommended. All interviewers are scheduled at the same time for efficiency and good candidate experience.
- It is highly recommended to have no more than one interviewer in a round.
- It is required to have no more than two interviewers in a round.

Step 3: Accept the Outlook calendar invitations for the Biweekly Recruiting Touch Base Meetings and Recruiting Process Timeline check points.

Following the Intake Meeting, the Recruiter will work to post your position and source candidates. Once a shortlist is ready, you will receive an email notification from your Recruiter to review the candidate's profiles in the 'Manager Review' stage within Workable.

Step 4: Review the requested candidate's profiles within **2 business days** and communicate how the Recruiter should move forward (move to recruiter screen, release, hold).

Once recruiter screens are complete, the Recruiter will determine if each candidate is aligned with the position requirements per the screen results. For those that are aligned, you will receive an email notification from your Recruiter to review the candidate's recruiter screen evaluation in the 'Recruiter Screen' stage within the 'Review' Tab in Workable.

Step 5: Review the requested candidate's recruiter screen evaluation within **2 business days** and communicate how the Recruiter should move forward (move to interviews, release, hold).

Step 6: Update your Interview Availability within Workable to align with the time zone of candidates to be interviewed.

Step 7: Review the Interview Guide provided by the Recruiter for that position's interviews and align your interview preparation (see the Interviewing Best Practices Training for reference).

Once scheduled for interviews, you will:

Step 8: Review the date and time of the interview to confirm your availability on your Outlook calendar and within Workable. If you need the interview time adjusted, please contact the Recruiter.

Step 9: Review the candidate's profile, interview questions, and your interview prepared structure prior to the interview.

Step 10: Interview all candidates using the same questions from the provided interview guide from the Recruiter to ensure a consistent, fair candidate experience.

Step 11: Complete the Interview Evaluation within **24 hours** of the completion of the interview with each candidate.

Step 12: Accept and attend the Interview Debrief Meeting scheduled by the Recruiter.

Step 13: Share your interview data collected for each candidate and ask questions during the Interview Debrief Meeting to gain all the information needed to make a hiring decision.

Step 14: Make a hiring decision within **2 business days** of the Interview Debrief Meeting completion.

Step 15: Once a hiring decision is made, the Recruiter will create the Offer Letter in Workable and process it for approvals. Once the Offer Letter is approved by Talent Acquisition and Compensation, you will:

Step 16: Process the Offer Letter Review in Workable no later than **24 hours** from the date received.

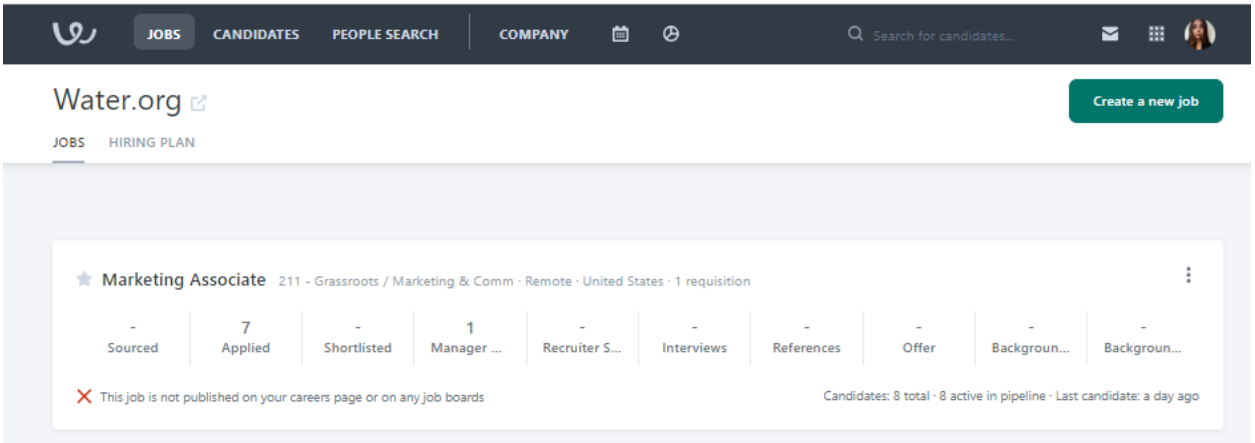
Once the candidate accepts the offer in Workable, pre-employment and onboarding begins. You will continue to receive Weekly Recruiting Update Emails from the Recruiter until the candidate's start date.

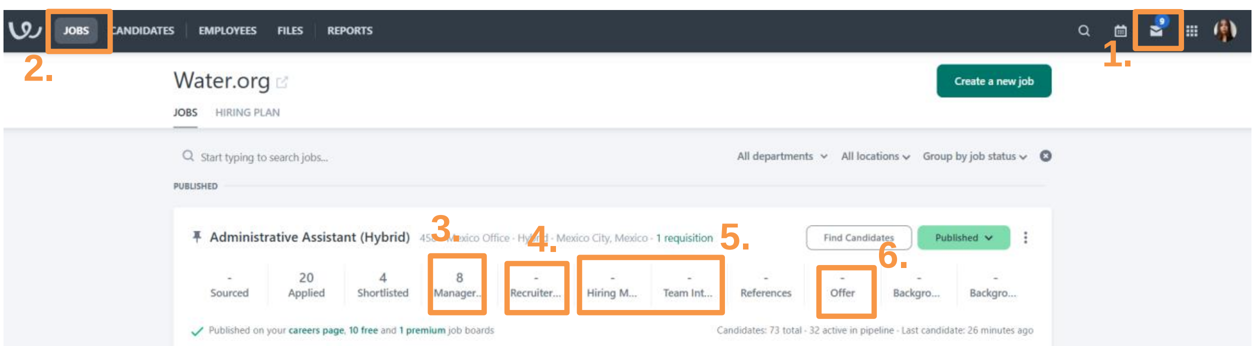
Workable Navigation

Your ATS, powered by Workable homepage offers menu options for Hiring Managers to access candidate profiles, evaluations, interview scheduling, and offer details.

Hiring Managers | Dashboard Tiles and Menu Options

The notable sections of the Workable homepage for requisition review and processing include the following:

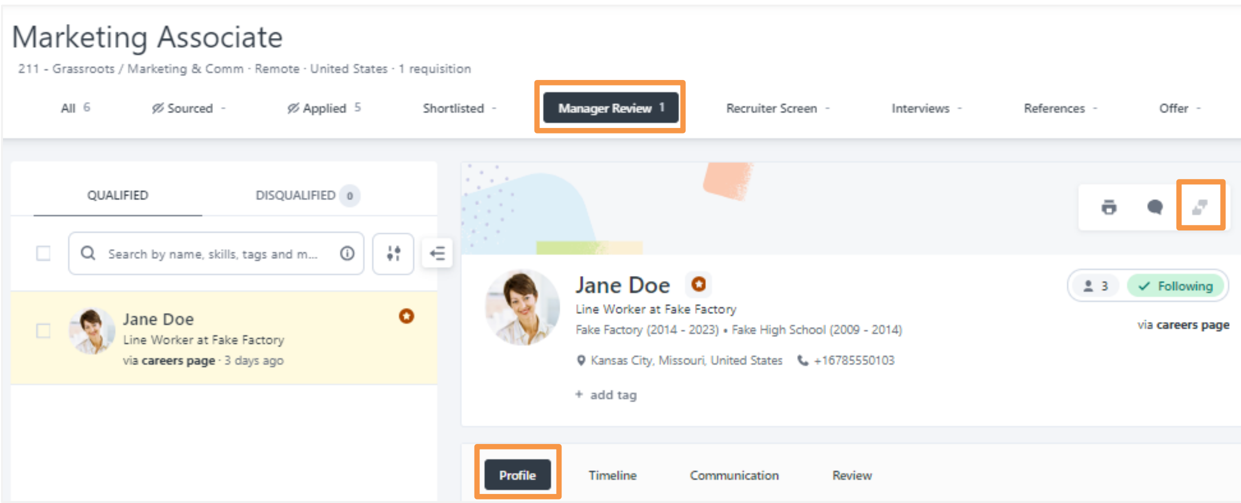




1. **Inbox**: The Inbox envelope icon provides notifications of actions that need to be taken.
2. **Jobs**: By default, you will arrive on the Jobs page. Here, you will see each of your open positions and the number of candidates in each step in the recruiting process.
3. Click on this recruiting step to view the shortlisted candidates. Generally, the first step will be to review a shortlist of candidates via the **Manager Review** section in the Job.
4. Click on this recruiting step to view screened candidates. Generally, the second step will be to review qualified, screened candidates via the **Recruiter Screen** section in the Job.
5. Click on this recruiting step to view interviewing candidates. Generally, the third step will be to evaluate interviewed candidates via the **Hiring Manager Interview and Team interviews** section in the Job.
6. Click on this recruiting step to view offered candidates. Generally, the final step will be to review and process the offer details via the **Offer** section in the Job.

Candidate Profile Review

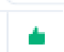
You will access the candidate's profile within the **Manager Review** stage.

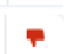


Profile: To view the candidate's application submission information, select the **Profile** tab within that candidate's profile. The **Profile** tab will provide access to information such as work experience, education, and resume/CV.

Add Evaluation:  This icon provides quick access to an evaluation for the candidate.

 The Star rating indicates the candidate is strongly recommended.

 The Thumbs Up rating indicates the candidate is recommended.

 The Thumbs Down rating indicates the candidate is not recommended.

As the candidate moves through the interview process, these additional tabs will appear as options in addition to Profile:

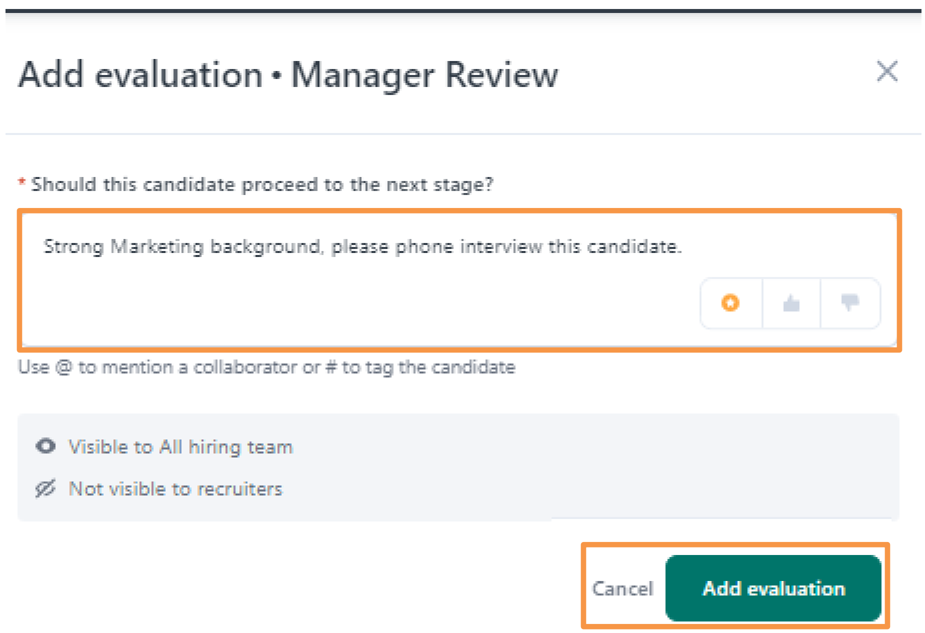
- **Collaboration**: When you access the candidate's profile, ensure you are on the 'Collaboration' tab to access comments added by the hiring team.

- **Review**: When you access the candidate's profile, ensure you are on the 'Review' tab to access the submitted evaluations for phone screens and interviews for that candidate.

Hiring Managers Review Prior to Recruiter Screen Evaluation

Following your review of each shortlisted candidate for the position, you will inform the recruiter how to move forward by submitting your Manager Review Evaluation.

Click the **Add Evaluation** icon to display the Add evaluation ● Manager Review pop up box.

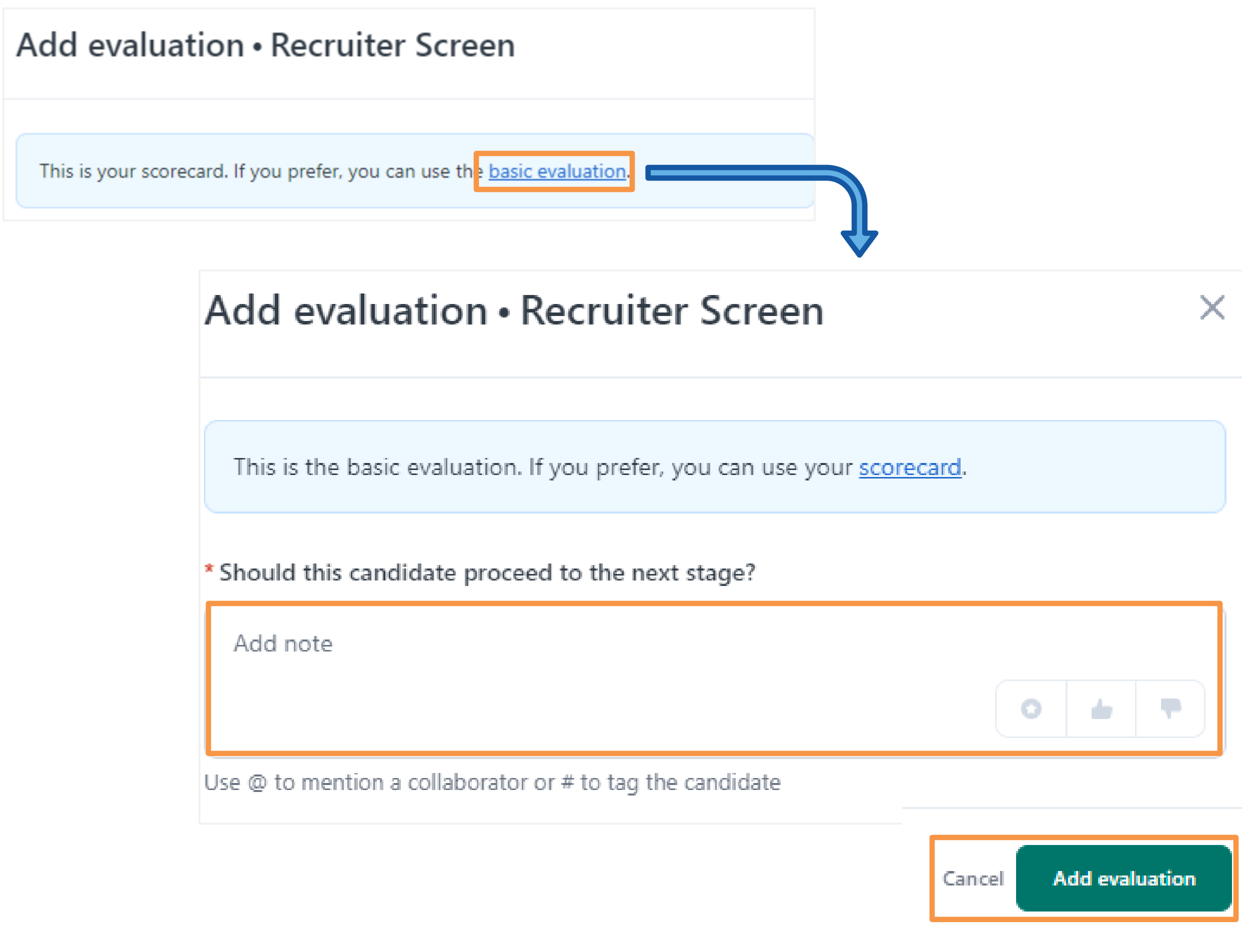


Add directions in the text box for the recruiter related to how they should move forward with this candidate. Select the appropriate evaluation icon (Star, thumbs up, thumbs down; *see page 12*), then click **Add evaluation** to submit to the recruiter. Click Cancel to exit without submitting.

Hiring Managers Review After Recruiter Screen Evaluation

Following your direction above, the recruiter will complete a phone screen evaluation of each candidate. Once complete, you will have access to the recruiter's evaluation of the candidate and suggested next steps.

After reviewing the recruiter's evaluation, click the **Add Evaluation** icon > to display the Add evaluation ● Recruiter Screen pop up box. Next, click on the **basic evaluation** link.

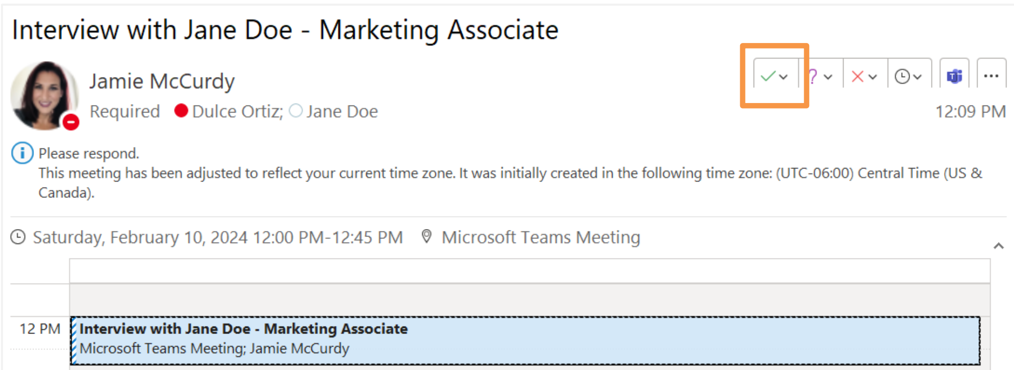


Add directions in the text box for the recruiter related to how they should move forward with this candidate. Select the appropriate evaluation icon (*see page 12*), then click **Add evaluation** to submit to the recruiter. Click Cancel to exit without submitting.

***Note:** This is a good time to review your Interview Availability preferences (see instructions, page 8) and confirm your Outlook calendar is up to date.*

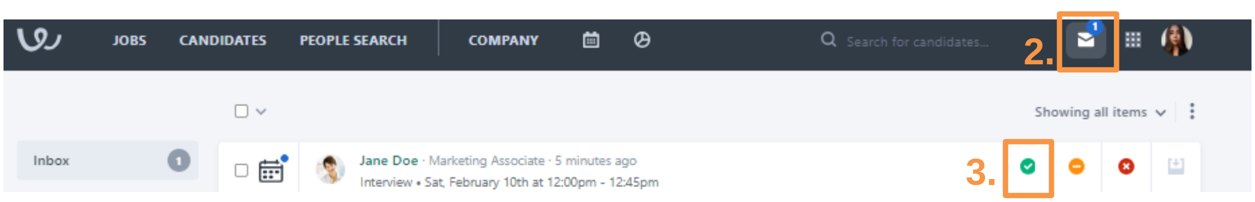
Interview Scheduling

When you are scheduled to interview a candidate, you will receive an Outlook calendar invitation with the scheduled date and time, based on your availability preferences, calendar availability and the availability of the candidate.



Upon receiving the calendar invitation, click the Accept option (**green** checkmark) to accept the interview invitation and add the event to your Outlook calendar.

Important: You will also need to accept the candidate interview in the ATS, powered by Workable. ~~Click the link in the Outlook invitation or~~ follow the steps below to log into the ATS, accept the candidate interview, and review the candidate's information in advance of the interview.

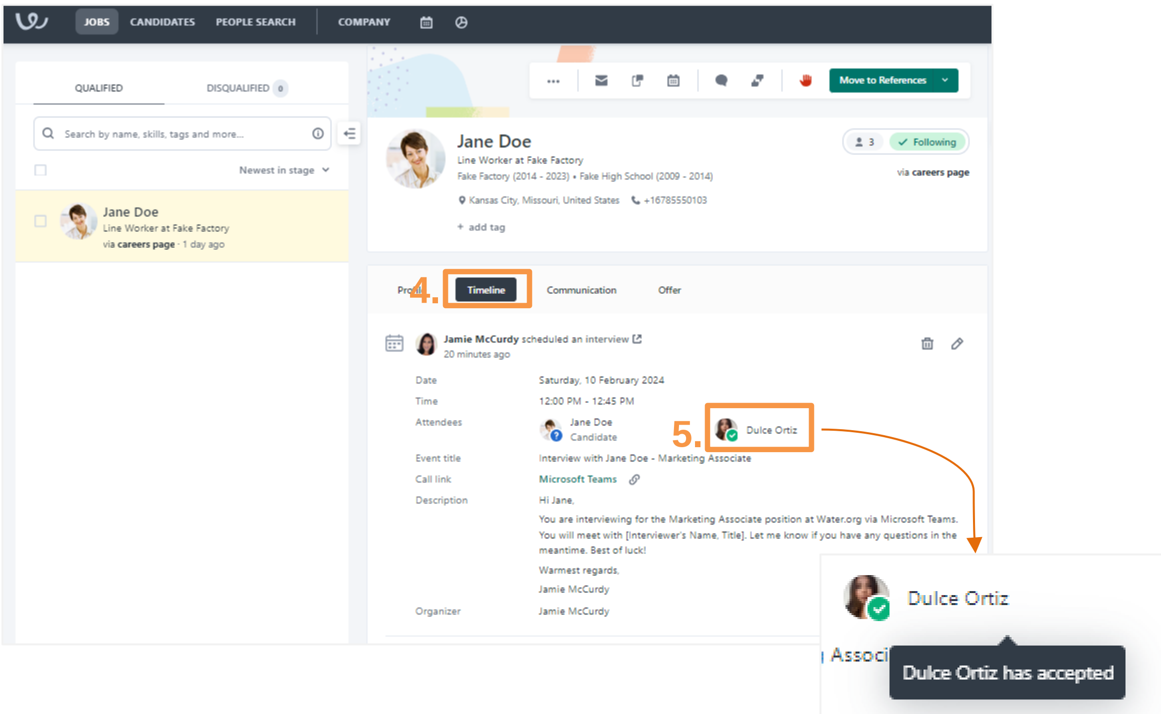


1. **Log into** the ATS, powered by Workable by following the **View Candidate** link included in the Outlook invitation.

2. Click on the **Inbox** (envelope) icon to view the interview event**.**

3. Select the green checkmark to **accept the interview invitation** and confirm your availability to interview at the designated date and time within the ATS.

   Now, when you visit the candidate's profile, you will notice the confirmed interview.

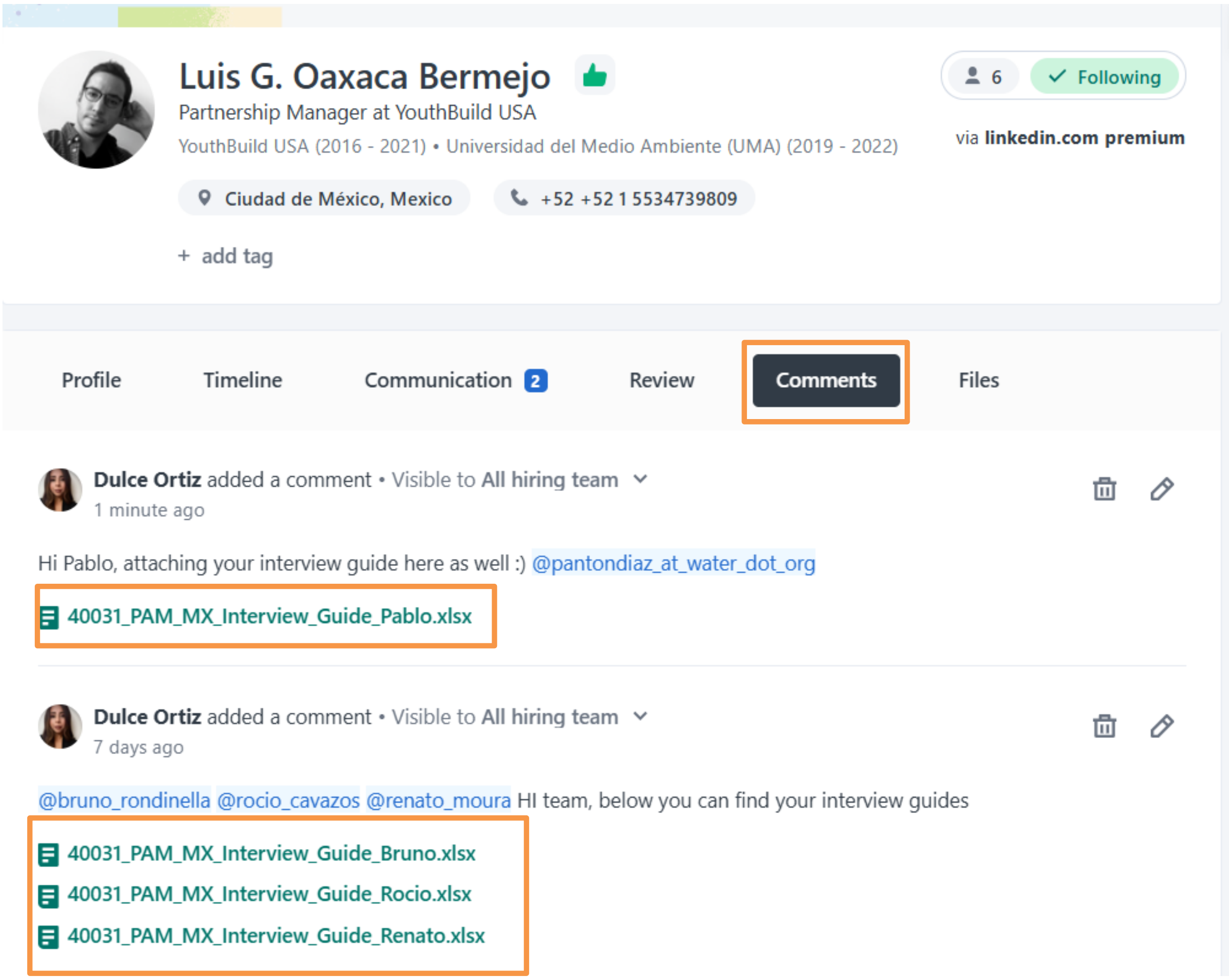


4. Within the candidate's profile, select the **Timeline** tab.

5. Confirm there is a **green** checkmark next to your Workable profile within the corresponding event.

Your Interview Guide

Prior to interviewing candidates for a position, your recruiter has provided your interview guides during the recruitment kickoff meeting and uploaded them under the comments tab in the candidate's profile within Workable.


Luis G. Oaxaca Bermejo
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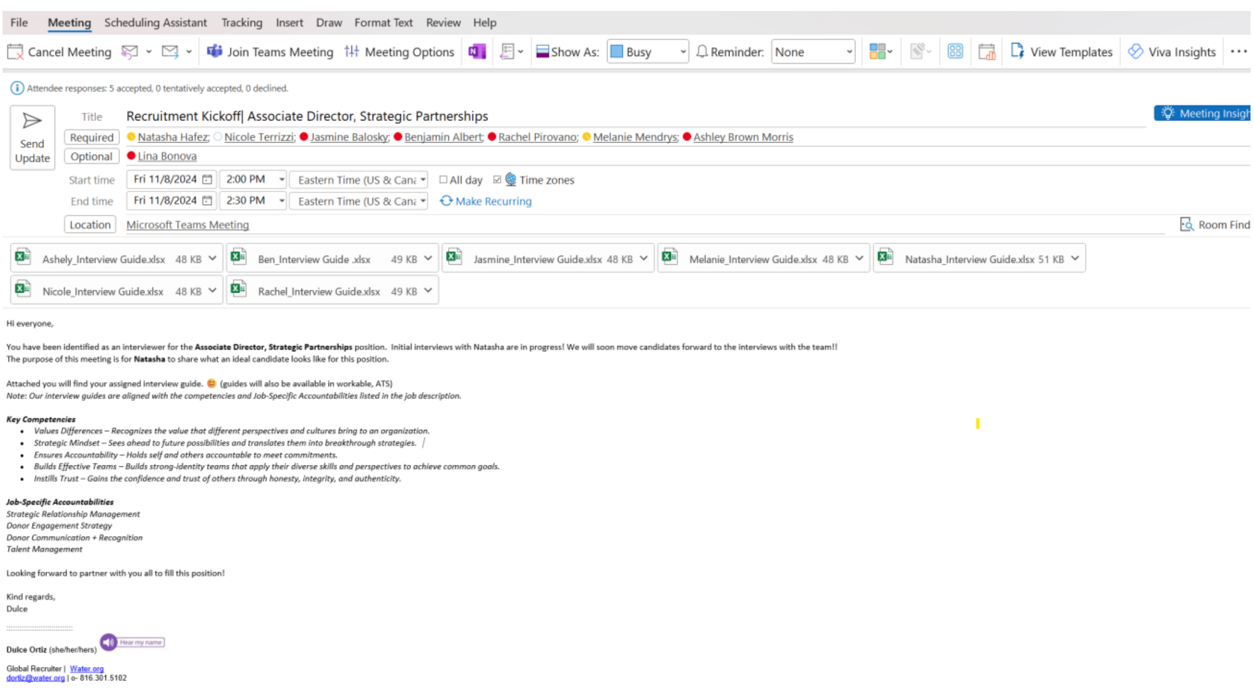
6
Following
via linkedin.com premium
Ciudad de México, Mexico
+52 +52 1 5534739809
+ add tag
Profile
Timeline
Communication 2
Review
Comments
Files
Dulce Ortiz added a comment • Visible to All hiring team
1 minute ago
Hi Pablo, attaching your interview guide here as well :) @pantondiaz_at_water_dot_org
40031_PAM_MX_Interview_Guide_Pablo.xlsx
Dulce Ortiz added a comment • Visible to All hiring team
7 days ago
@bruno_rondinella @rocio_cavazos @renato_moura HI team, below you can find your interview guides
40031_PAM_MX_Interview_Guide_Bruno.xlsx
40031_PAM_MX_Interview_Guide_Rocio.xlsx
40031_PAM_MX_Interview_Guide_Renato.xlsx

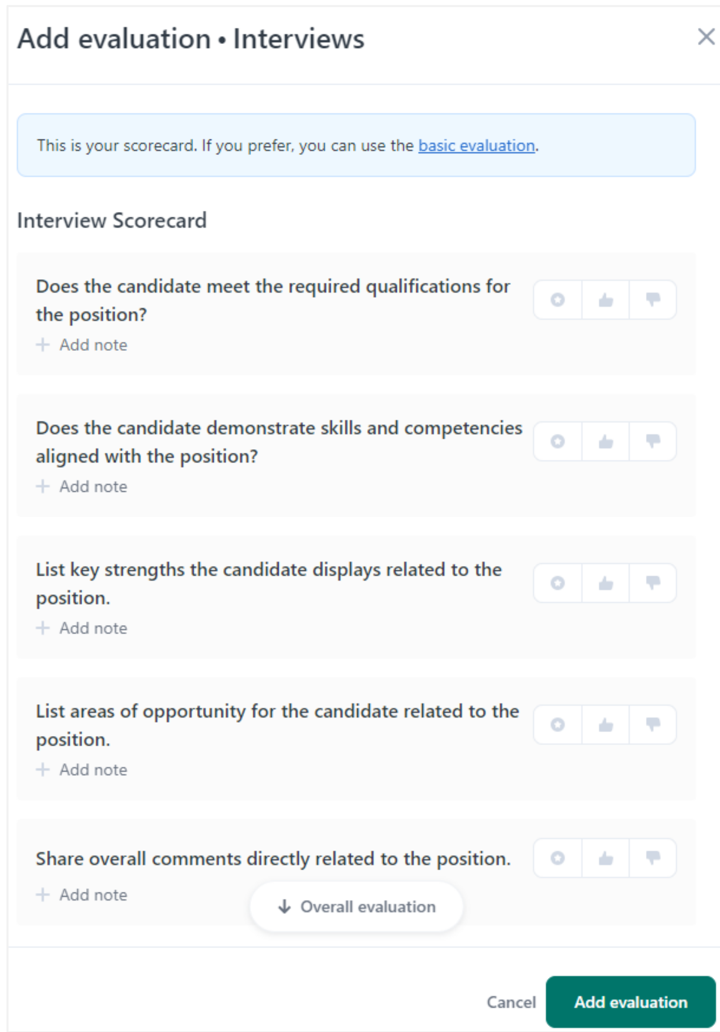

File Meeting Scheduling Assistant Tracking Insert Draw Format Text Review Help
Cancel Meeting
Join Teams Meeting
Meeting Options
Show As: Busy
Reminder: None
View Templates
Viva Insights
Attendee responses: 5 accepted, 0 tentatively accepted, 0 declined.
Send Update
Title Recruitment Kickoff| Associate Director, Strategic Partnerships
Meeting Insigh
Required Natasha Hafez; Nicole Terrizzi; Jasmine Balosky; Benjamin Albert; Rachel Pirovano; Melanie Mendrys; Ashley Brown Morris
Optional Lina Bonova
Start time Fri 11/8/2024 2:00 PM Eastern Time (US & Cana All day Time zones
End time Fri 11/8/2024 2:30 PM Eastern Time (US & Cana Make Recurring
Location Microsoft Teams Meeting
Room Find
Ashely_Interview Guide.xlsx 48 KB
Ben_Interview Guide .xlsx 49 KB
Jasmine_Interview Guide.xlsx 48 KB
Melanie_Interview Guide.xlsx 48 KB
Natasha_Interview Guide.xlsx 51 KB
Nicole_Interview Guide.xlsx 48 KB
Rachel_Interview Guide.xlsx 49 KB
Hi everyone,
You have been identified as an interviewer for the Associate Director, Strategic Partnerships position. Initial interviews with Natasha are in progress! We will soon move candidates forward to the interviews with the team!!
The purpose of this meeting is for Natasha to share what an ideal candidate looks like for this position.
Attached you will find your assigned interview guide. (guides will also be available in workable, ATS)
Note: Our interview guides are aligned with the competencies and Job-Specific Accountabilities listed in the job description.
Key Competencies
• Values Differences – Recognizes the value that different perspectives and cultures bring to an organization.
• Strategic Mindset – Sees ahead to future possibilities and translates them into breakthrough strategies.
• Ensures Accountability – Holds self and others accountable to meet commitments.
• Builds Effective Teams – Builds strong-identity teams that apply their diverse skills and perspectives to achieve common goals.
• Instills Trust – Gains the confidence and trust of others through honesty, integrity, and authenticity.
Job-Specific Accountabilities
Strategic Relationship Management
Donor Engagement Strategy
Donor Communication + Recognition
Talent Management
Looking forward to partner with you all to fill this position!
Kind regards,
Dulce
Dulce Ortiz (she/her/hers)
Hear my name
Global Recruiter | Water.org
dortiz@water.org | o- 816.301.5102
Using market-driven financial solutions to change lives with safe water. Join us.

Interview Evaluation Submission

Following your interview with the candidate you will submit your interview evaluation.

Interview evaluations are located within the candidate's profile in the ATS. Within the interviewed candidate's Profile, click the **Add Evaluation** icon > to display the Add evaluation ● Interviews pop up box.

Complete each of the required evaluation fields:



Qualifications Assessment: use the star/thumbs-up/thumbs-down indicators and add notes to share your assessment of the candidate related to the required qualifications for the position.

Skills + Competencies Assessment: use the star/thumbs-up/thumbs-down indicators and add notes to share your assessment of the candidate related to the required skills and competencies for the position.

Key strengths candidate displays related to the position: use the star/thumbs-up/thumbs-down indicators and add notes to share the strengths you assessed in the candidate that align with the position.

Areas of opportunity for candidate related to the position: use the star/thumbs-up/thumbs-down indicators and add notes to share the areas the candidate is lacking relative to the position based on your interview.

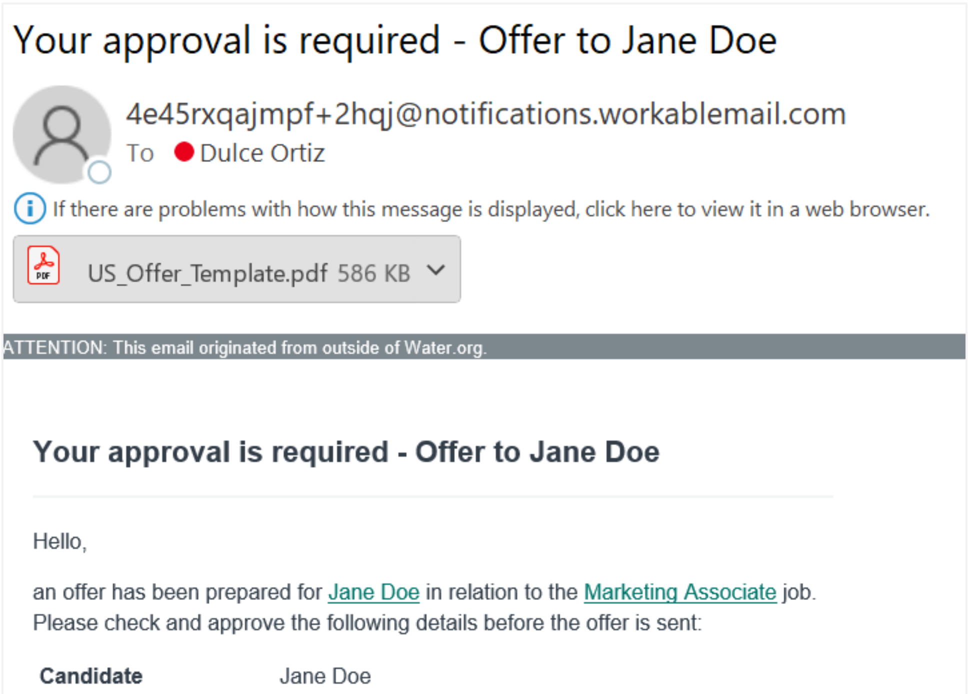
Overall comments directly related to the position: use the star/thumbs-up/thumbs-down indicators and add notes to share any additional comments as it relates to the position requirements based on the behavioral interview you conducted with the candidate.

When complete, click **Add evaluation** to submit to the recruiter. Click Cancel to exit without submitting.

Reminder: *More information on the evaluation icons is available on page 12 of this guide.*

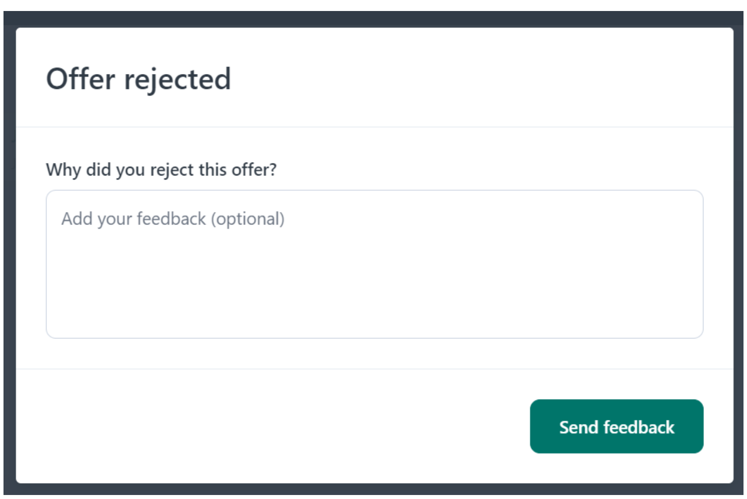
Offer Review and Action

When an offer requires your review for processing, you will receive an email notification containing the offer details for your review and consideration.



At the bottom of the email message, you will see an option to **Approve This Offer** or **Reject**. By selecting one or the other, you will successfully process your decision for that offer.

Note: *If you 'Reject' the offer, you will be asked to add your feedback for the reason of rejection.*



Questions?
Email recruiting@water.org