Paycom Hiring and Applicant Tracking
Full Process Guide

Human Resources Department
Archdiocese of Seattle

May 2024

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Introduction

This guide was created with Archdiocese Client Users in mind, showcasing the process of hiring utilizing the Paycom system, specifically for the Archdiocese of Seattle. This guide is intended to demonstrate how to use the Applicant Tracking system with The New Employee Queue to streamline the hiring process. This full process will move qualified candidates from interview to job offer to new employees!

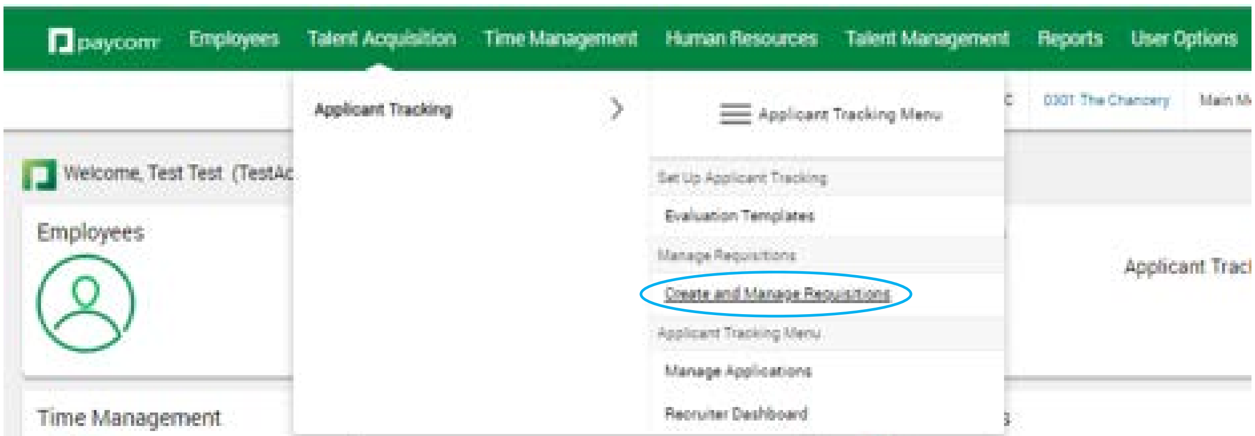
The guide begins with the process of creating and submitting position requisitions, then will highlight the Recruiter Dashboard and the many special features to assist with managing applications. Learning how to how to schedule interviews, establish a hiring workflow as well as utilizing message templates to provide applicant feedback will be covered in this full process guide.

Creating A Requisition

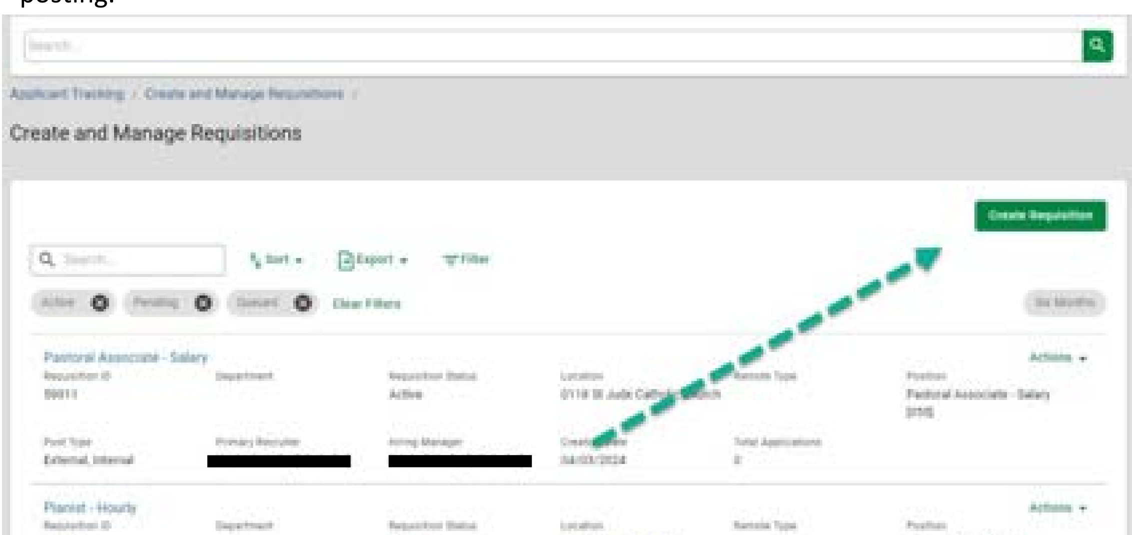
Note: *A requisition cannot be saved as a draft. Begin building your requisition in a fresh tab and close any other open Paycom tabs.*

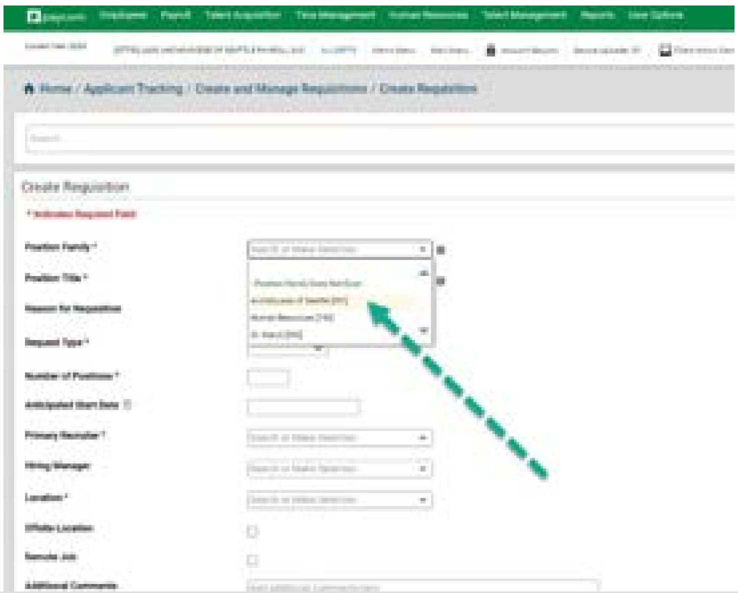
Start by logging into your Client User Account

Navigate to the **Talent Acquisition** menu and hover over to open the drop-down options. Hover over the **Applicant Tracking** text and follow the right arrow to the additional menu that appears. In the **Manage Requisitions** section of this menu, click **Create and Manage Requisitions**.



From this page, navigate to the **Create Requisition** green button to begin building your job request for posting.



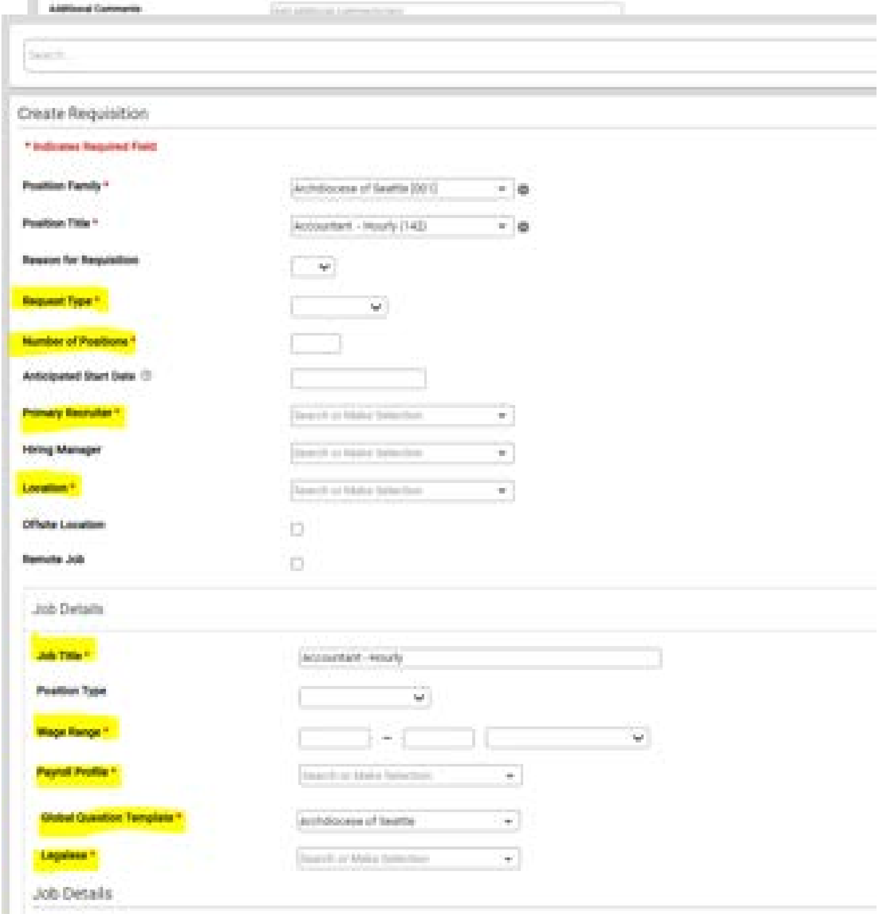


The first step in creating your requisition begins with choosing Position Family from the drop down. Click into the search box to select Archdiocese of Seattle [001]

Tip:
Position Family will **ALWAYS** be Archdiocese of Seattle.

The next step is to choose the Position Title that most closely describes the job from the drop-down menu. You can either type the name of the position or scroll to find the title.

Tip:
If your desired position title does not appear on this list, please reach out to hr@seattlearch.org for assistance.



Continue to fill out the remainder of the required fields.

The **Reason for Requisition** can be left blank.
Request type: Choose the best option that best describes request type.

For **Primary Recruiter** and **Hiring Manager*** see more below.
Tip: Anyone listed as the Hiring Manager **MUST** have signing authority to approve the offer letter.

Location will be your location – this is advertised.

Remote Job: Most positions in the Archdiocese are onsite or hybrid, do not choose this option unless the role is completely remote.

Job Details:
First 3 fields will be advertised. Ex. Job title can be the operating title to attract candidates to the role.

Position Type: choose the option from the drop down, if the position is more than 30 hours it will be fulltime.

Wage Range is a required field and pay type will align with the selected position title (admin assistant – hourly will be hourly). indicative

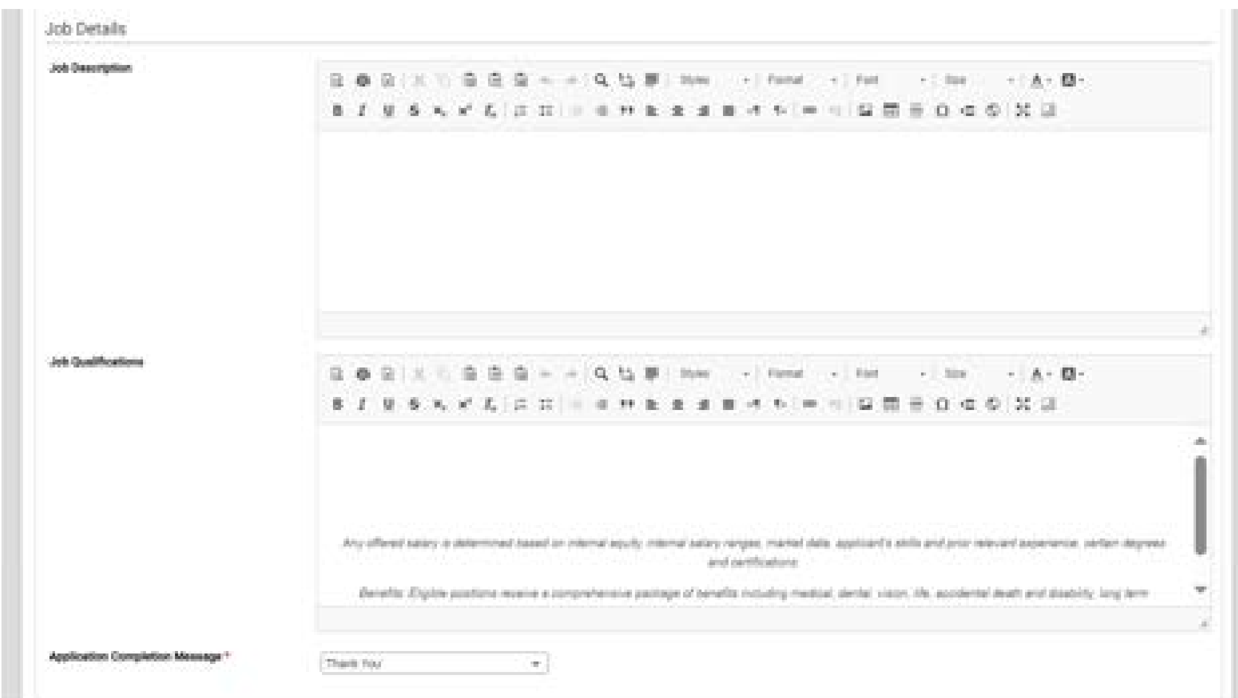
Payroll Profile will be 0TT54 – Archdiocese of Seattle Payroll Profile except for Blessed Sacrament Church, Associated Catholic Cemeteries, Fulcrum Foundation, St. Elizabeth Ann Seton High School, Pope John Paul II High School, Bishop Blanchet High School, and O'Dea High School, all of which should instead choose the option corresponding to their respective location name.

Global Question Template will be Archdiocese of Seattle

Legalese will be 4000 Arch of Seattle

*__Hiring Manager vs. Primary Recruiter__
When choosing the recruiter or hiring manager, please ensure the selected party has Client-side access. Automatically the Primary Recruiter will receive the notifications for any fully completed applications to the job posting. Notification emails will only be sent once an application has been fully completed and signed off on by applicants. Both the Hiring Manager and Recruiter on the Requisition will be able to see new applications as they are submitted in the Recruiter Dashboard. **If you would like to add additional recruiters, manager, or any additional people will need client user access to receive email notifications when an application is submitted, please make note in your requisition request.**

If you have any questions about client access, please email hr@seattlearch.org



Job Description: Enter the job description into the box and edit the information as needed. There is a bank of job descriptions available in the HR Toolkit on the Archdiocese of Seattle website. Job description templates from the toolkit can be edited to fit the needs of the parish, 75% of the duties should remain unchanged – more than 25% different or if ***ANY*** duties are subtracted from the template, please engage with HR@seattlearch.org.

Job Qualifications: Add the job's qualifications into the box and edit and format as needed. **Do not remove the preloaded text** regarding benefit offerings. We are required by law to include information about our benefits offering when posting jobs. This language has been approved and should not be edited or adjusted in Job Requisitions.

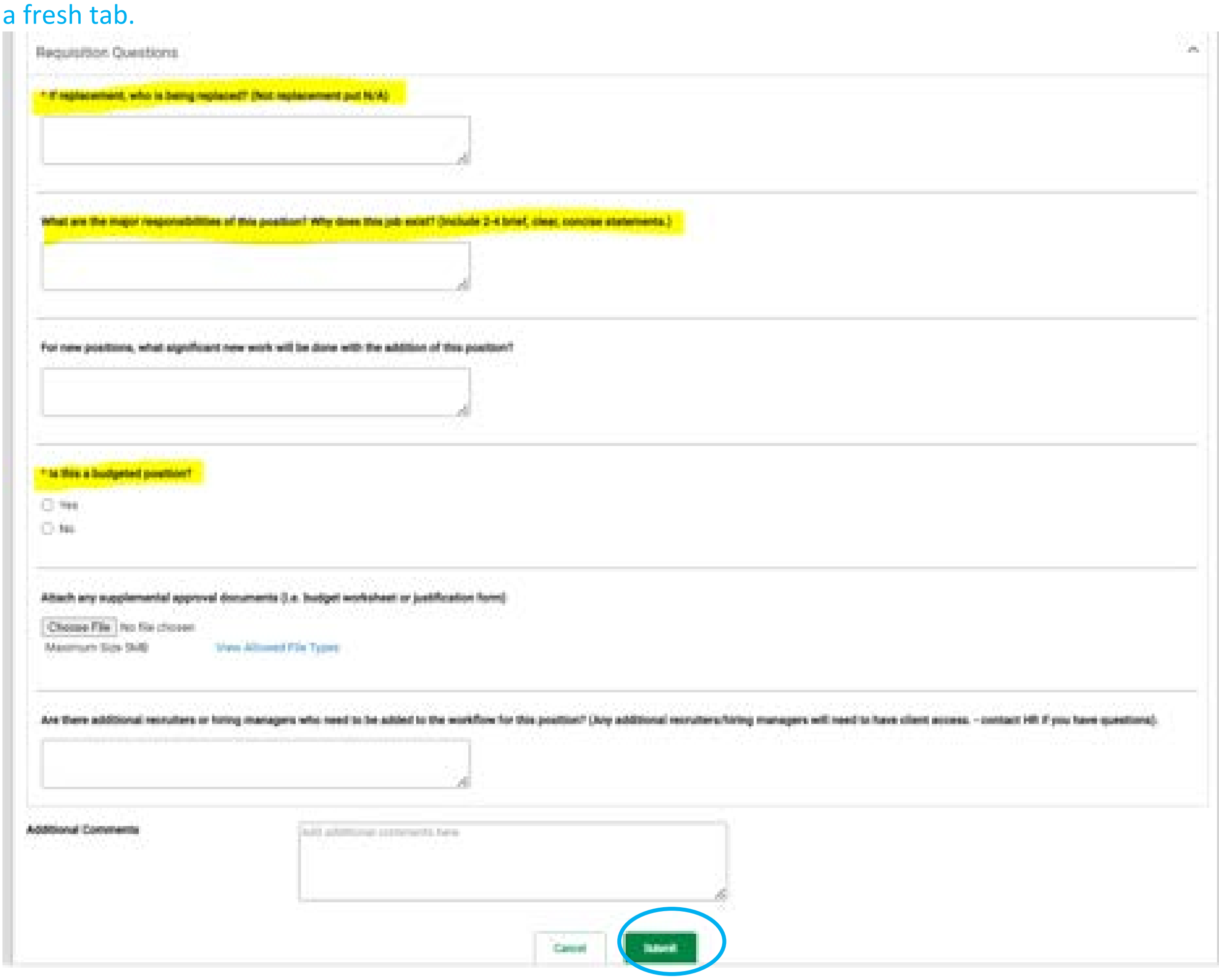
Leave the Application Completion Message as the default "Thank You".

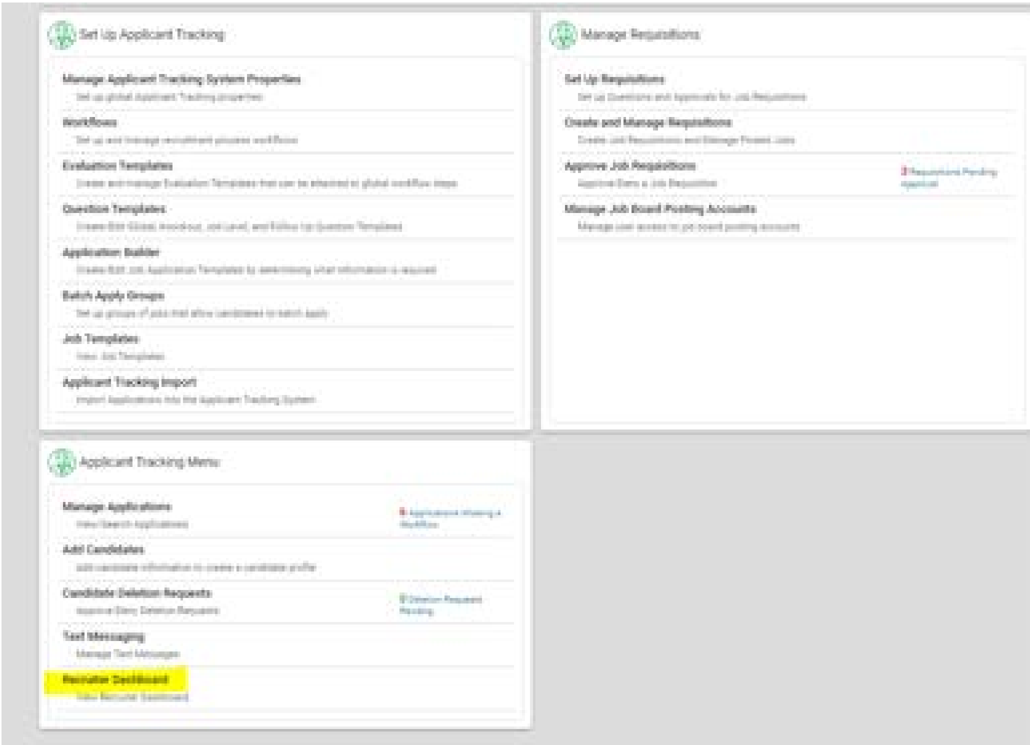
Complete all required Requisition Questions. These questions are reviewed by Human Resources and considered when approving the Requisition request.

Upload any supporting documentation that would be applicable to the request, this could be a position justification form, or budget worksheet for the role. This is **NOT** a required field.

Finally add in any additional recruiters or hiring managers who should be part of the recruiting process. These will need to be individuals how have client access.

Click **Submit** to send the requisition to HR to review.
Reminder: There is not a save button to save the requisition as a draft. Begin building your requisition in a fresh tab.

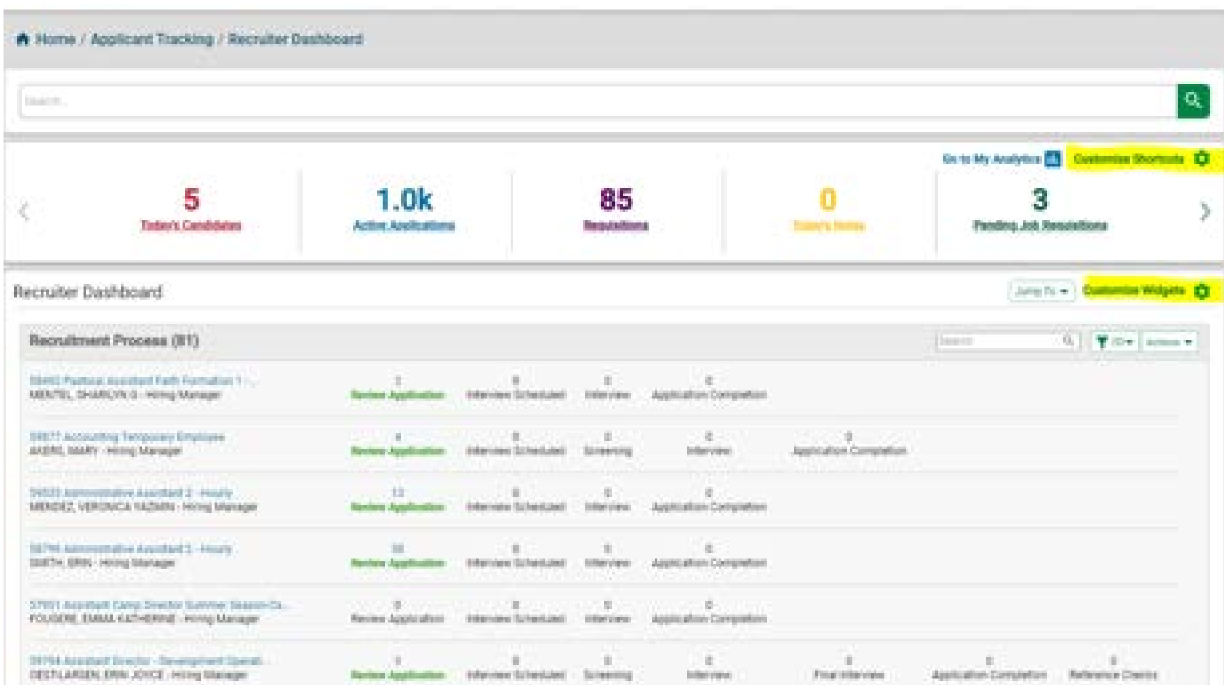




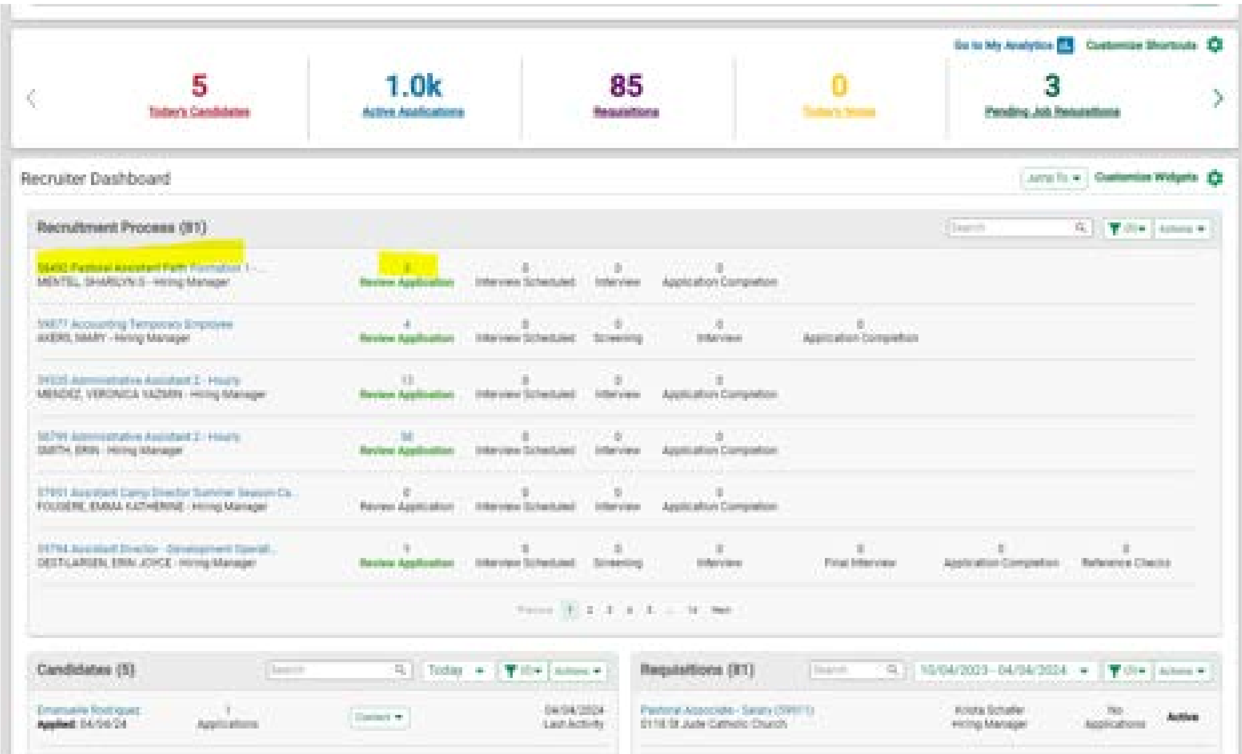
Step 2: Managing your open requisition.

Once your position has been approved by Human Resources and posted externally, your job will show up in the Recruiter Dashboard. Here you can manage new applications, schedule interviews, rate, and disposition candidates.

The Recruiter Dashboard can be found under the Applicant Tracking tab of your top menu, navigate to the bottom of the menu options to find your Recruiter Dashboard.

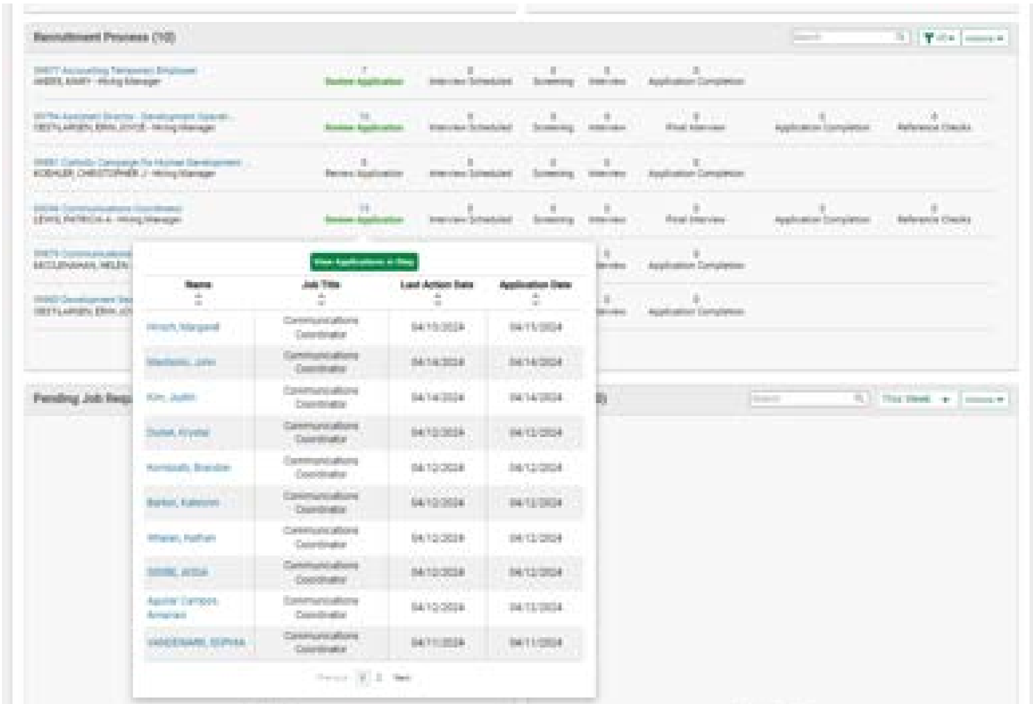


Once you have opened the Dashboard, there will be a bar of colorful boxes along the top with different widgets, available for you to customize.
[Show Me How: to Customize the Recruiter Dashboard]() Find more information on how to customize your dashboard in the link above.



In the recruitment process section, you can access your posted job and the current applicants. The blue number indicates the number of applicants in the assigned workflow step. You can click on the number to review the candidate profile in the specific step (Review Application, Interview Scheduled, etc.)

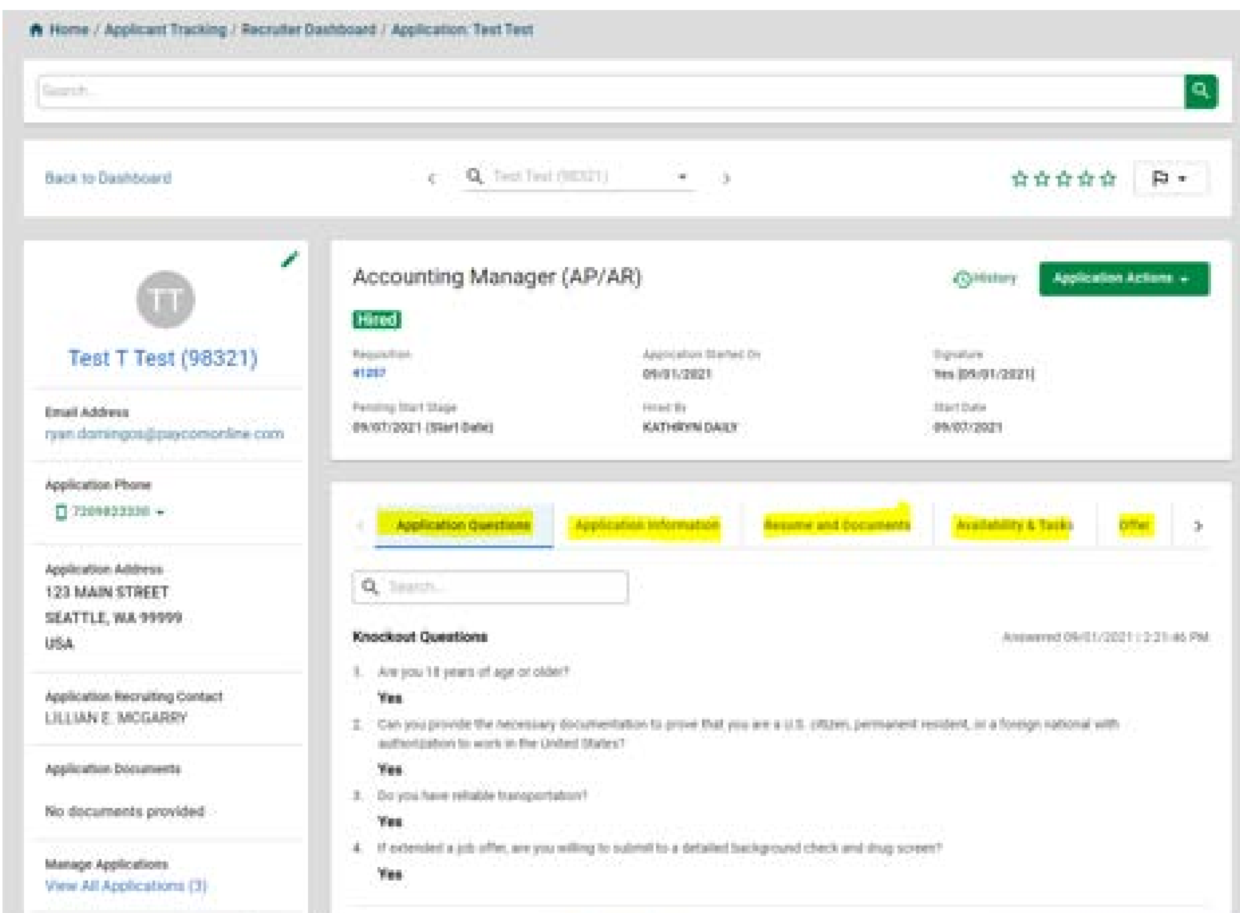
From your step in the Recruitment Process widget, select the blue hyperlink number and click "View Applications in Step" in the popup.



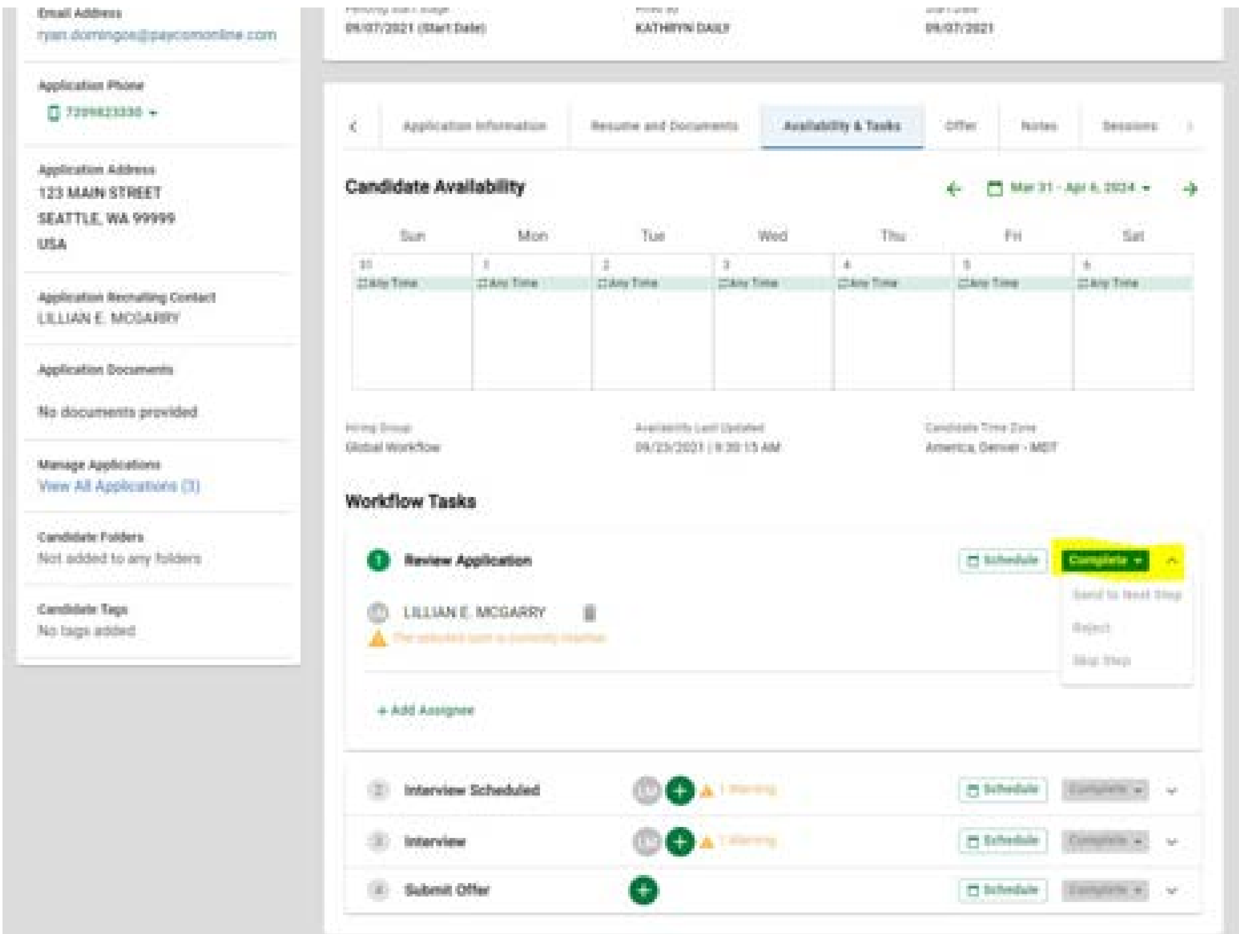
A pop-up window with a list of the applicants will open. Look closer at each application by clicking the applicant's name in blue text.

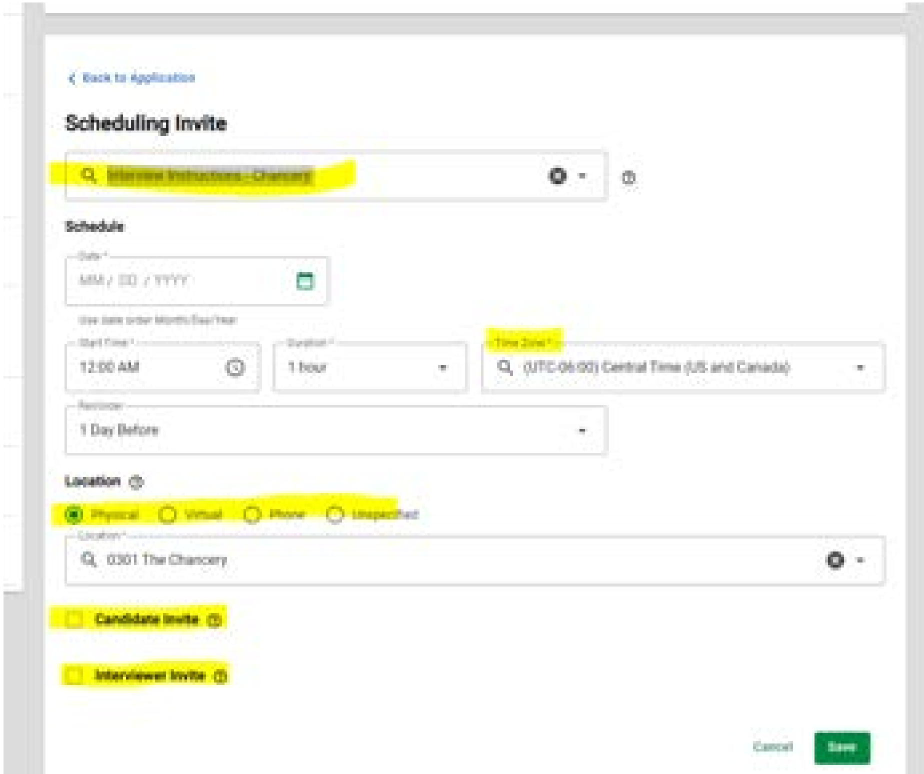
*Tip: If more than 10 applications have been received, make sure to check all pages at the bottom of the pop-up box.

This is an example of a candidate profile; the highlighted section shows the areas of the application to review. Review each area of the candidate's application.



- Application Questions: The Application Questions tab contains the candidate's answers to the knockout, global, job level and/or follow up questions tied to the applications.
- Application Information: The Application Information tab contains the candidate's education, employment and references. This is completed by the candidate in the initial application submission.
- Resume and Documents: On the Resume and Documents tab, you can view the resume and/or cover letter the candidate uploaded to the application. Click the three-dot icon to view, print or download a file.
- Availability and Tasks: Review and manage the interview process and workflow for each candidate. Inside the window the candidate's workflow tasks indicate where they are in the interview process. You can move candidates forward by clicking Send to Next Step. You can also reject a candidate in this stage from moving forward in the interview process.



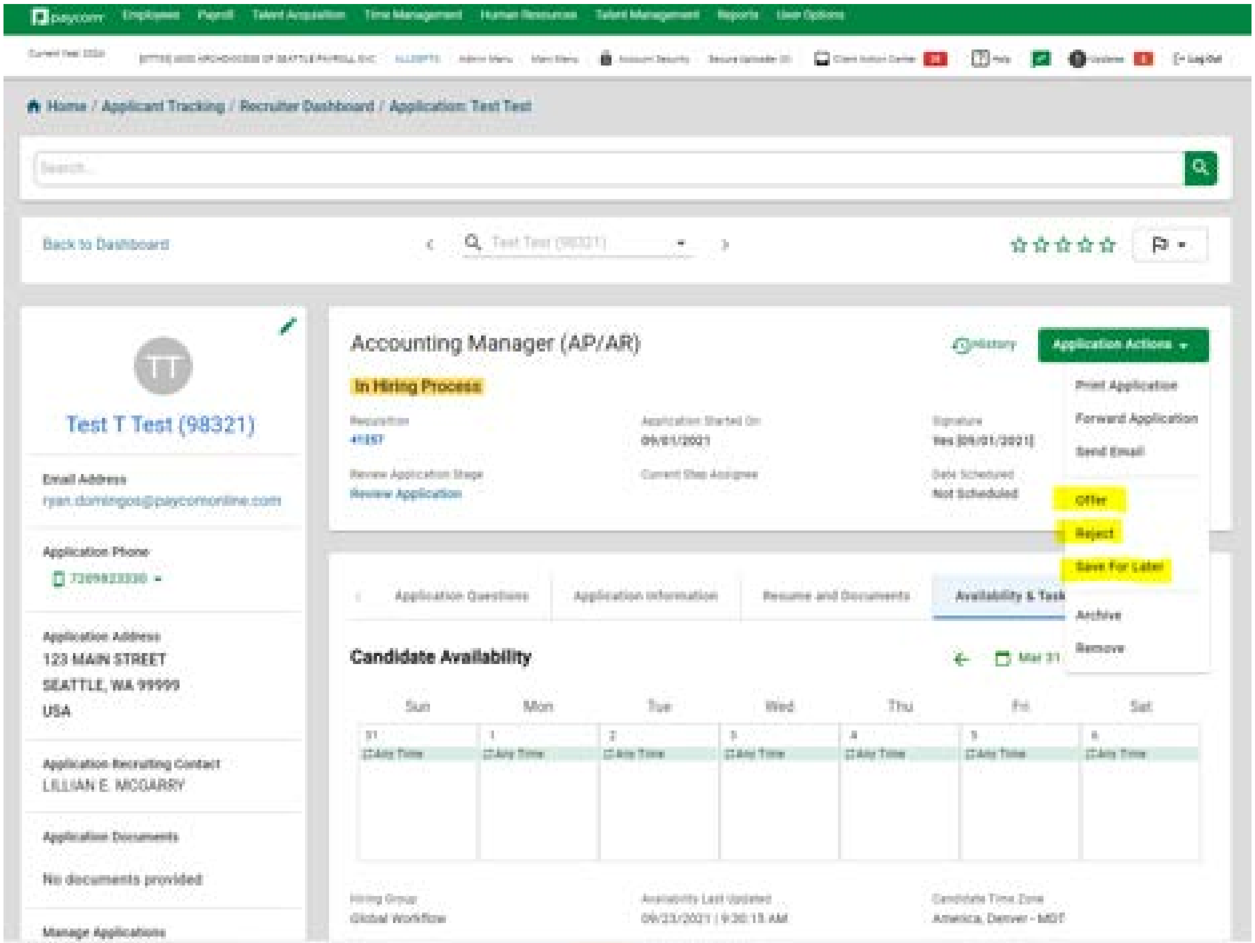


Within the availability and tasks tab, you can schedule candidates. This is what the screen will display to invite candidates directly through Paycom.

Choose the appropriate template for the candidate to receive instructions at the top of the window first. Tip: Always customize the Time Zone to **Pacific Standard Time**, Paycom will default to Central time.
Location will populate based on the option chosen. If it is a phone interview, enter in the number that will be used to call the candidate, if it is a virtual interview, the link can be added here. Physical interviews.

Candidate invite: If you need to add specifics of the interview location, this can be added here. This section will act as an email to your candidate.

Interviewer Invite: Additional People can be added to receive the interview invite. The email will also be sent to the other Hiring Managers or Recruiters assigned to the step.
Click Save and the invite will be sent to candidate and interview panel participants.

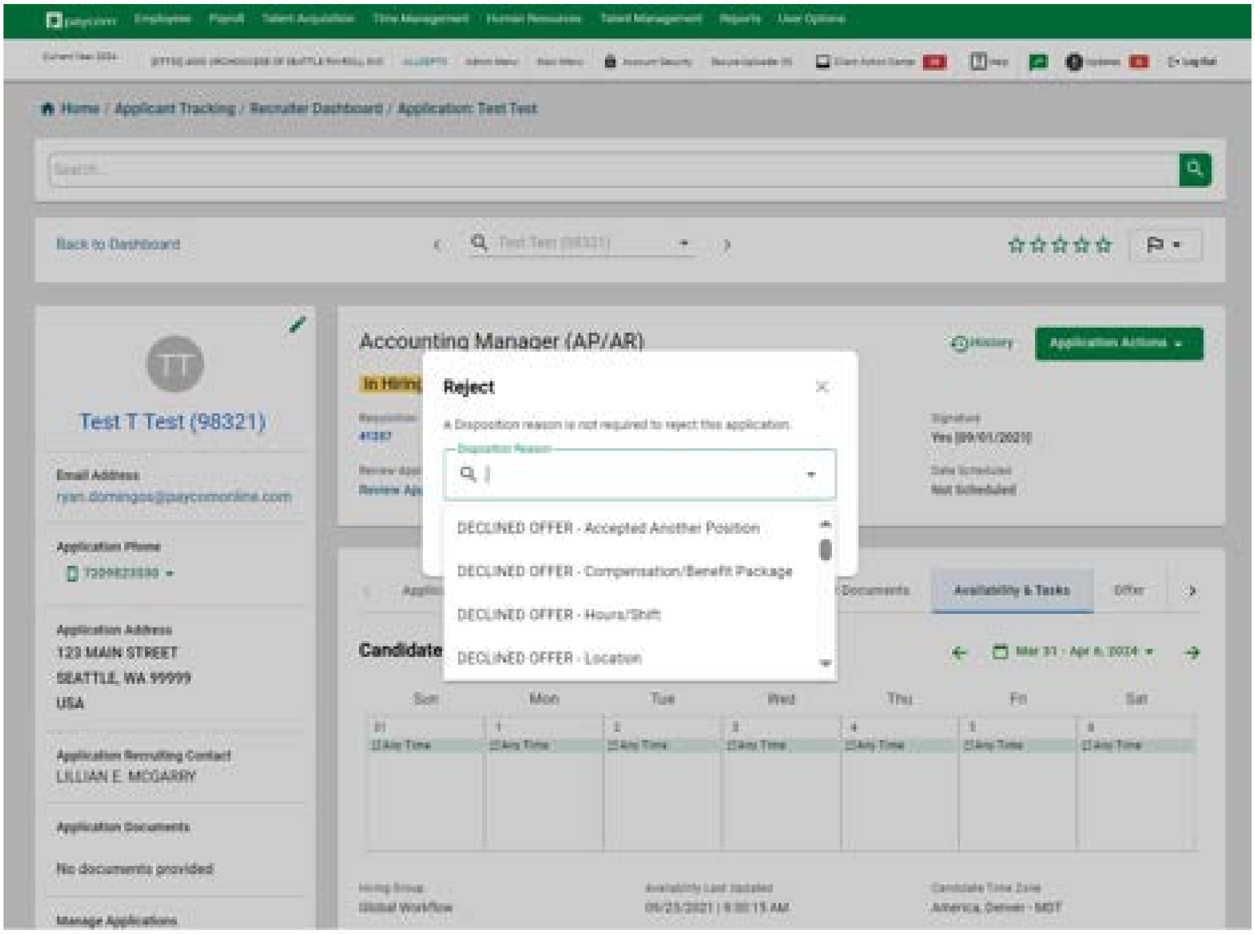


After you have finished your interview process, Application Actions drop-down menu allows you to take quick action on a candidate's application. Let's review each action you can accomplish through the Actions drop-down menu.

Offer: Allows you to move the candidate into the Offered Candidates section of the dashboard. When this is selected, a pop-up window will let you choose the offer template to be sent to the candidate.

Reject: Reject can happen at any step in the interview process, from the initial screen to the physical interview. This will remove the candidate from the pool of applications for the position. This can always be reversed, and the application can be made active if necessary.

Save for Later: This should only be used if you do not want to consider this candidate at this time, but do not want to fully disposition them. These would be the candidate you want to "keep warm."

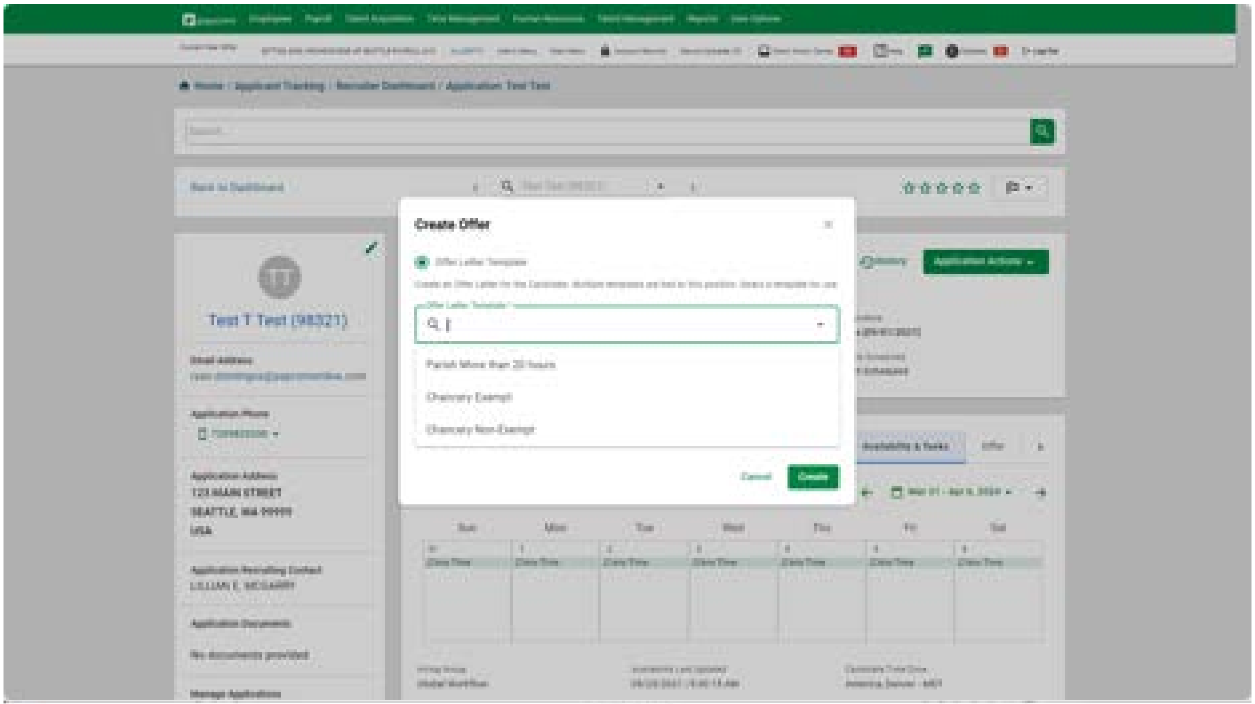


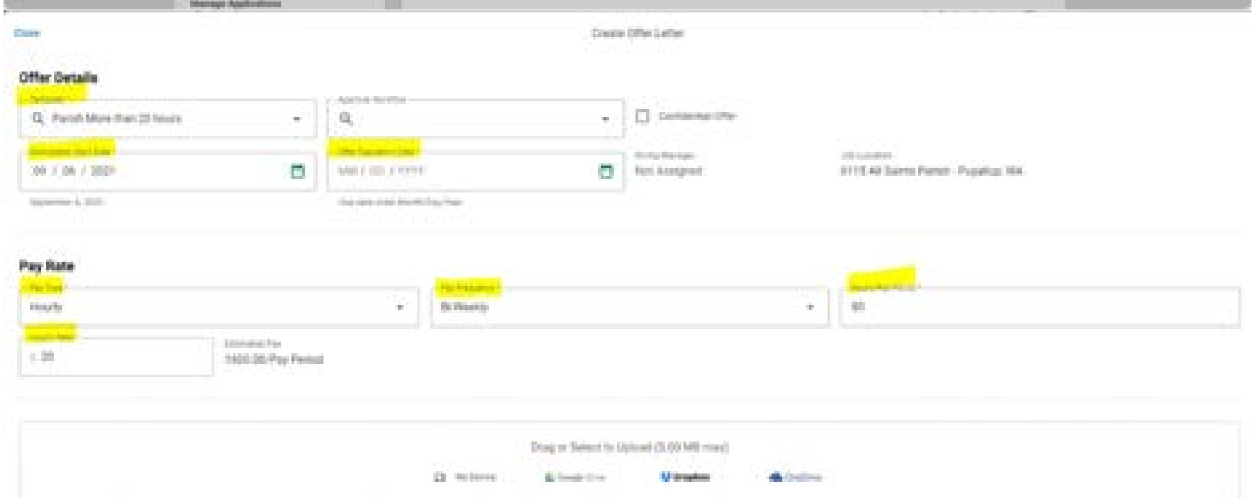
Rejecting candidates is also referred to as **dispositioning candidates**. This will help with categorizing the candidate with the most accurate reason why the applicant was not selected for the position.

Creating the Offer

When you choose Offer in under application actions, the pop-up window as previously mentioned will appear for a template to be chosen.

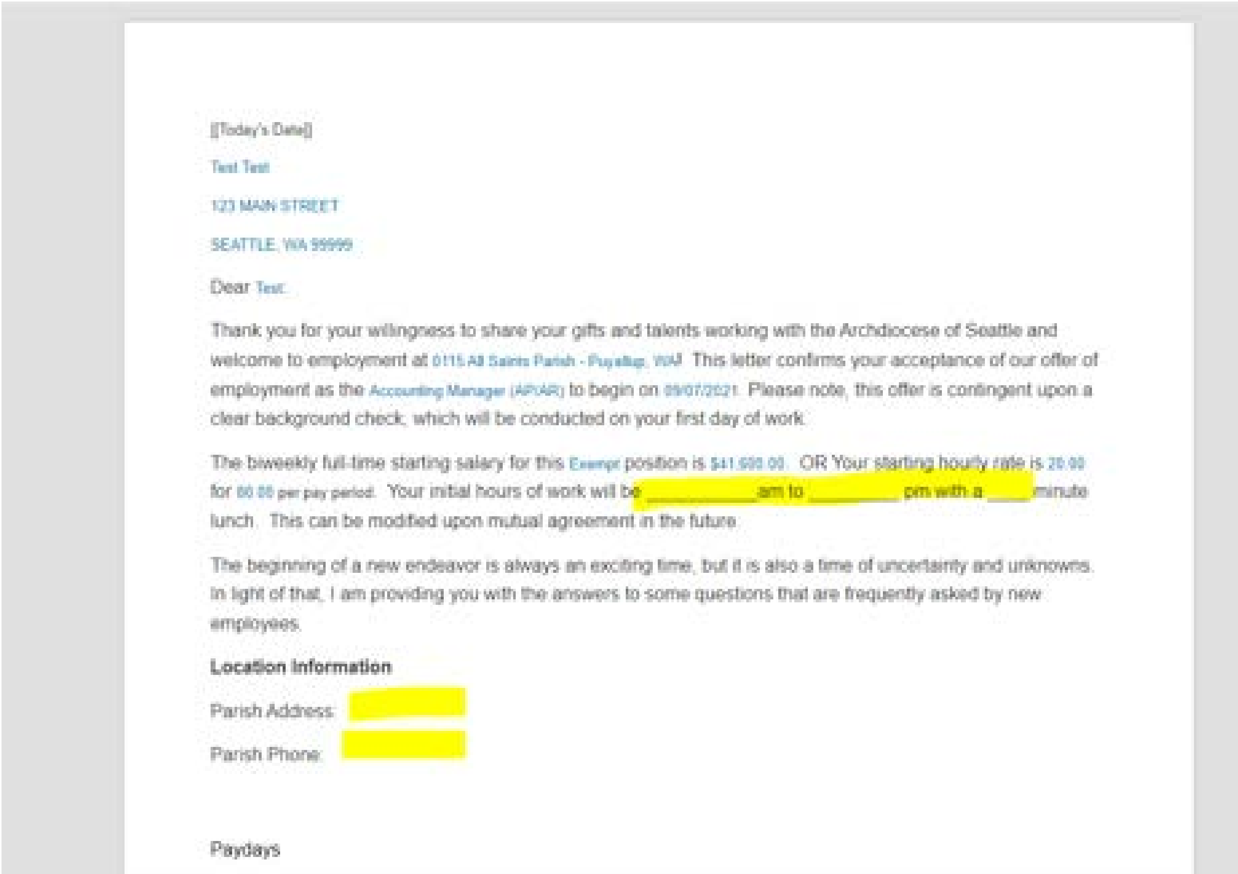
The available templates can be chosen from the dropdown. Each dynamic field tied to the selected offer letter template displays beneath the Offer Details section so you can enter the necessary information into the offer letter.
In the offer details, enter in the correct dates and corresponding information to be included in the offer. All areas highlighted can be edited before sending to the candidate.





When the offer is ready, click “Send to Approver” from the Offer Letter Approval Status section to send it through the approval workflow.

Each approver will receive an email notification when it’s their turn to approve the offer letter



[[Today's Date]]

Test Test

123 MAIN STREET

SEATTLE, WA 99999

Dear Test:

Thank you for your willingness to share your gifts and talents working with the Archdiocese of Seattle and welcome to employment at 0115 All Saints Parish - Puyallup, WA! This letter confirms your acceptance of our offer of employment as the Accounting Manager (AP/AR) to begin on 09/07/2021. Please note, this offer is contingent upon a clear background check, which will be conducted on your first day of work.

The biweekly full-time starting salary for this Exempt position is $41,600.00. OR Your starting hourly rate is 20.00 for 80.00 per pay period. Your initial hours of work will be __________ am to ________ pm with a ____ minute lunch. This can be modified upon mutual agreement in the future.

The beginning of a new endeavor is always an exciting time, but it is also a time of uncertainty and unknowns. In light of that, I am providing you with the answers to some questions that are frequently asked by new employees.

Location Information

Parish Address:

Parish Phone:

Paydays

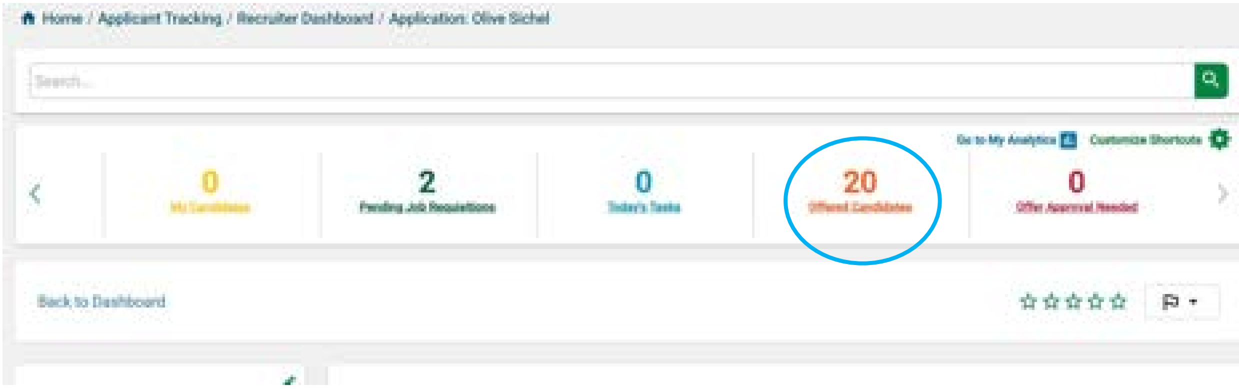
Review the information and details in the body of the offer letter, such as the shift times, the work address, and best phone number for the work location.

In the Send Offer Message pop-up window, preview the email that will send to the candidate and make any necessary edits. When finished, click “Send.” Or click “Skip Message” to push the offer letter to the candidate’s profile without sending an email. When the candidate views the offer letter, the Candidate Review Status section updates to reflect the action.

Finishing the Offer Process

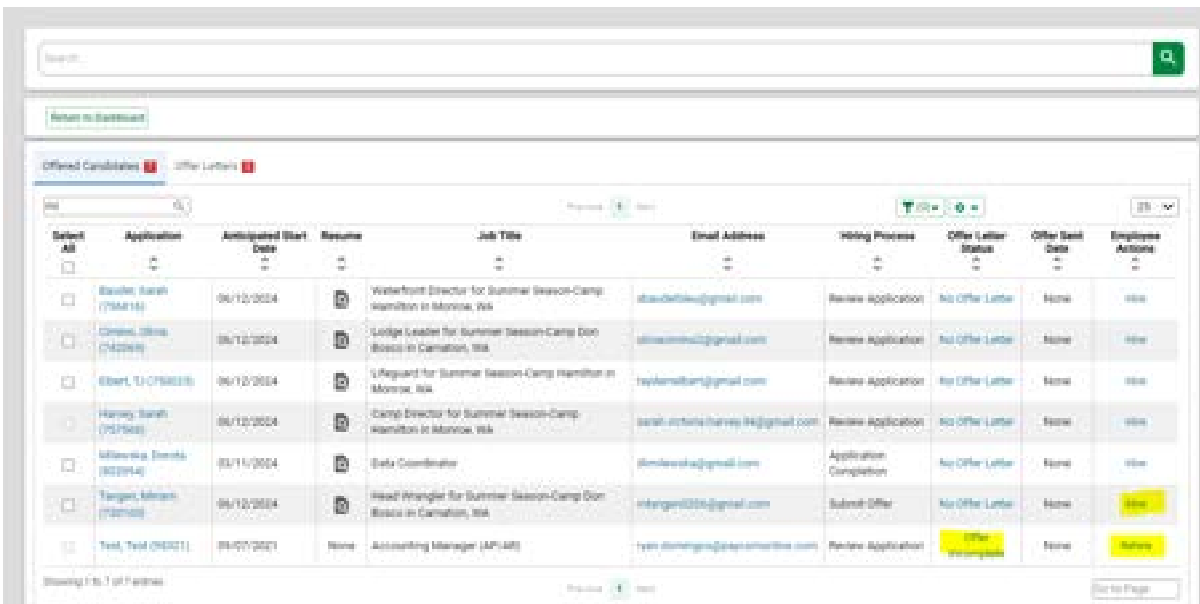
If you navigate back to the Recruiter Dashboard, in the top bar you will find the Offered Candidates section. All candidates who have been made offers within the Archdiocese will appear here.

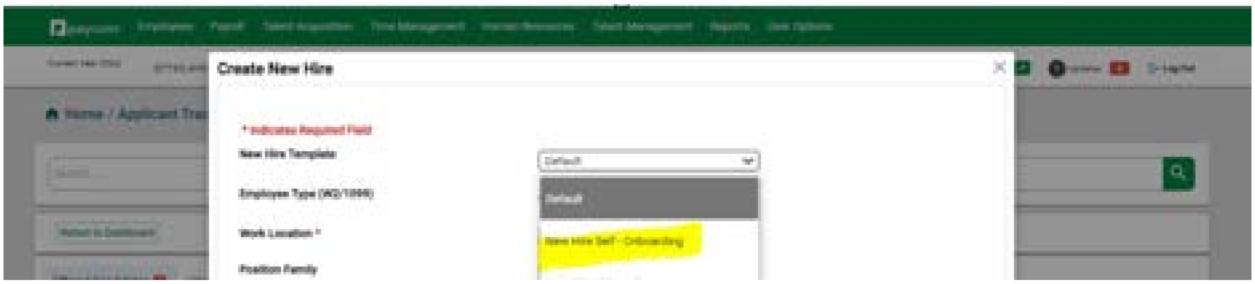
Click right arrow under Customize Shortcuts to reveal “Offered Candidates.”



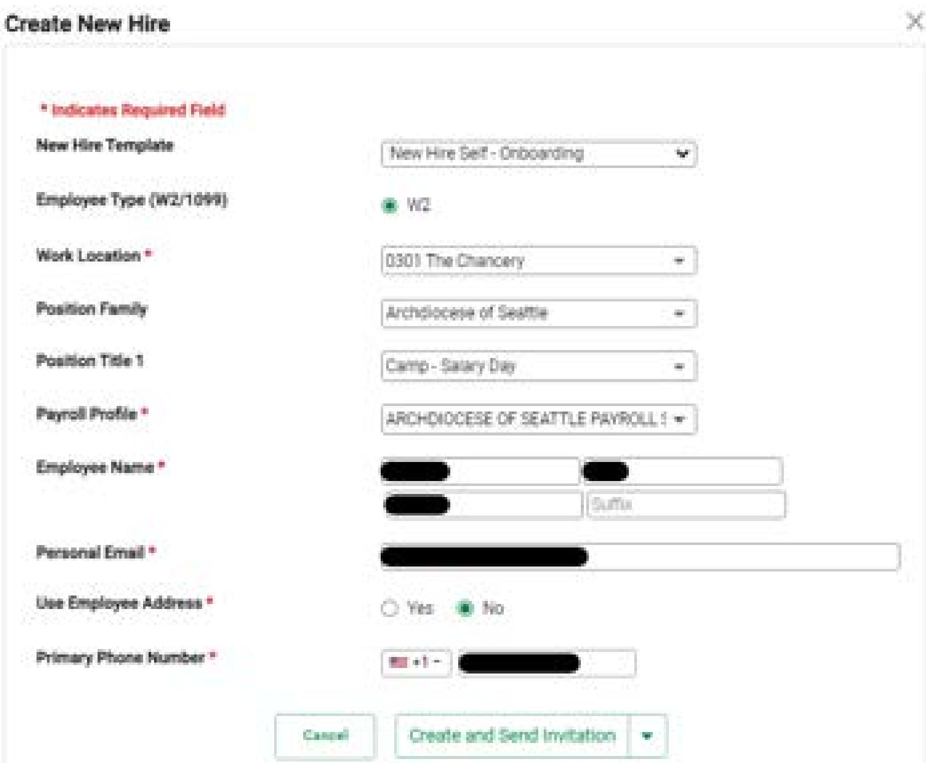
Find your candidate from the list to assess the current status of the offer. If anything is missing, such as the offer is not signed (shown in the image) do not continue to hire the candidate until all steps have been completed.

- If the offer letter is incomplete, it can be addressed by clicking the blue text. This will open the candidate's profile in the offer step. Finish the necessary tasks to send the offer letter to your candidate.





When you hit the hire button, you will create the invitation to for the New Hire. You will need to select the template – **New Hire Self-Onboarding**. If your screen shows other additional templates, please do not select any other option than New Hire Self-Onboarding.

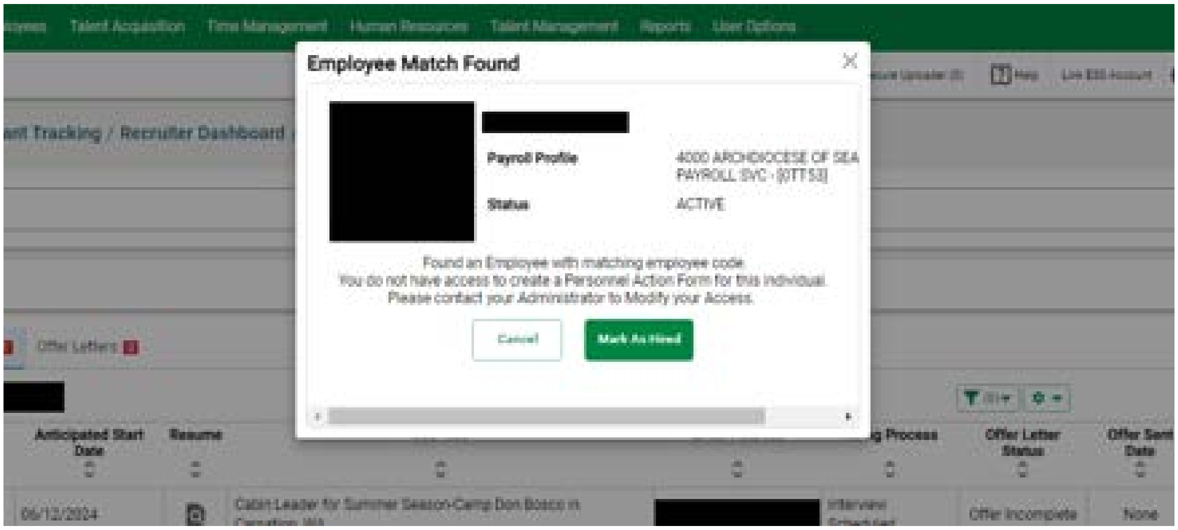


The remainder of the fields should autofill with the information the applicant used in completing their application. Once all information in the Create New Hire window has been filled in and verified, click the Create and Send Invitation button.

This will move the candidate from the Applicant Tracking section to the New Hire Queue.

If the candidate was a previous employee, a pop-up screen will appear letting you know the Personnel Action Form for a rehire can be created directly from the My Offers screen.

*Tip: To identify rehires, Paycom will compare the candidate's Social Security number and/or employee code to your employee records.

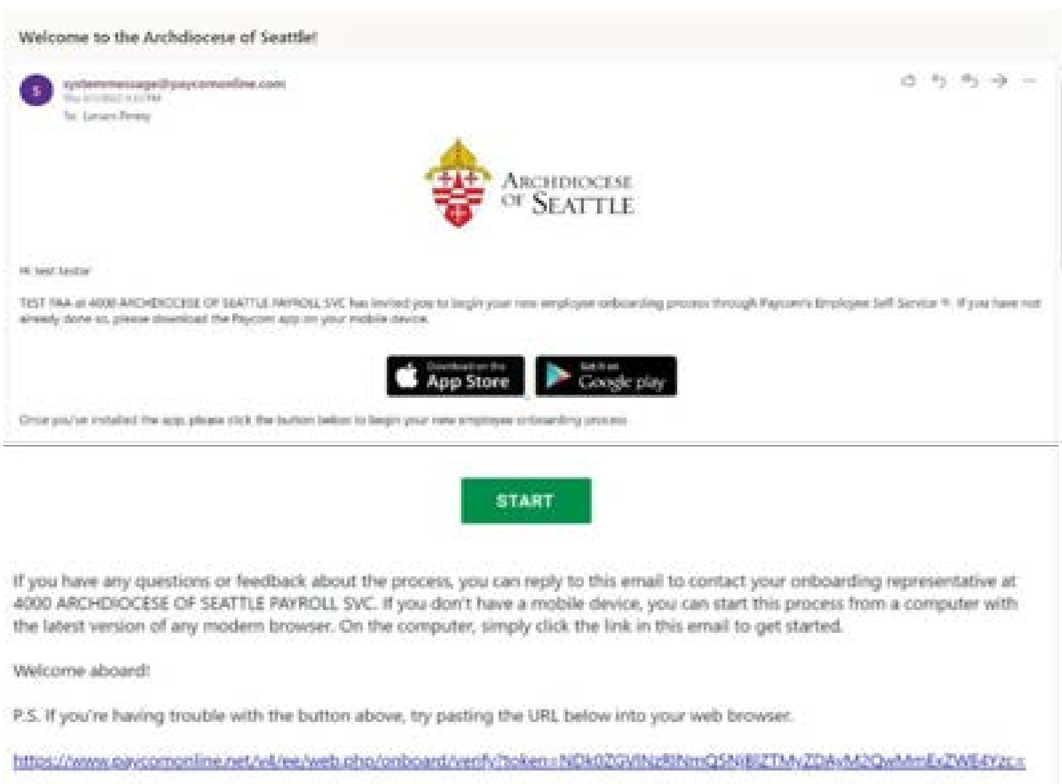


*Rehires returning to the same location can proceed with the Rehire PAF if the employee existed in the location previously. A paper PAF Transfer or Rehire form does not need to be submitted if the employee is returning to the same location.

New Employee Profile Invitation

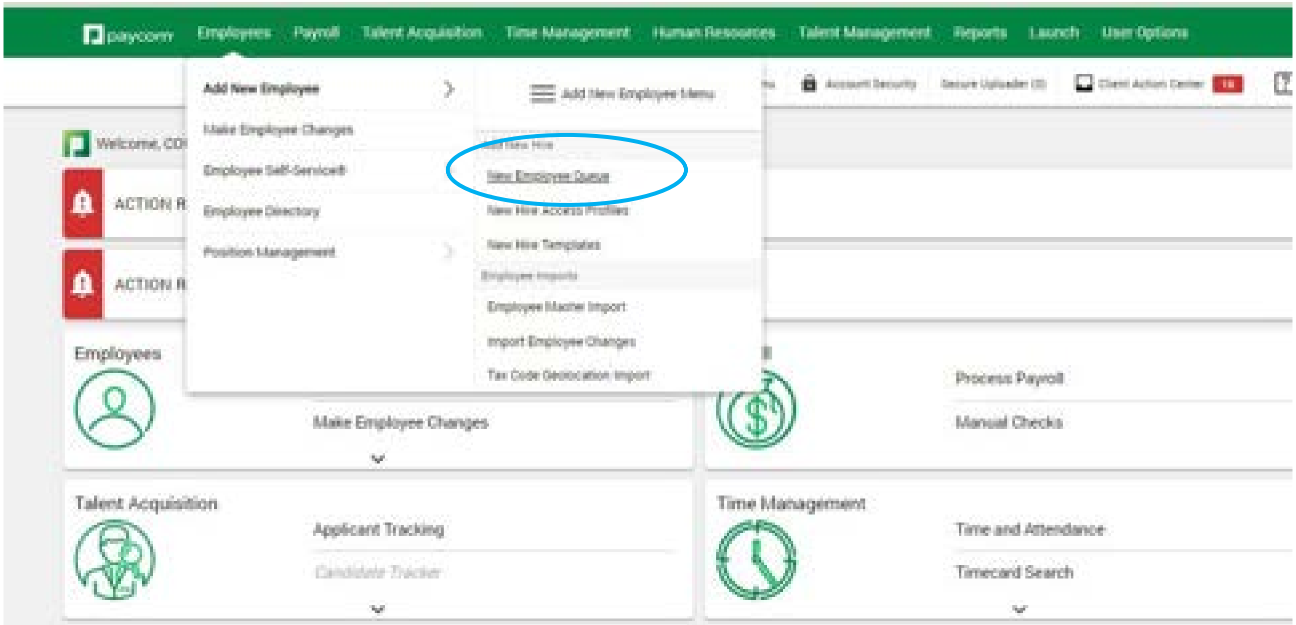
An invitation will be sent to the candidate for them to begin their portion of the hew hire process. This is a sample of the email employees receive from Paycom.

Reminder: Background checks are completed through Virtus, and all offers of employment are contingent upon clearing a background check. Make sure the candidate understands this requirement. If the candidate does not pass the background check, the offer will be withdrawn.



New Hire Queue

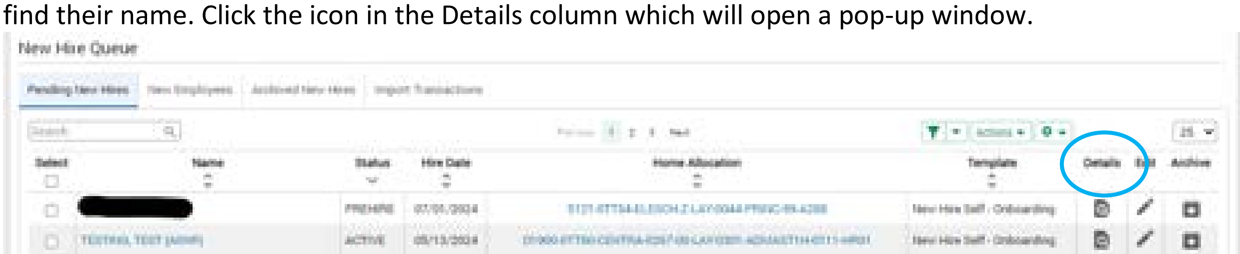
Navigate to the New Hire Queue found under the **Employees** menu title. Select the **New Employee Queue** from the menu to open a new page.



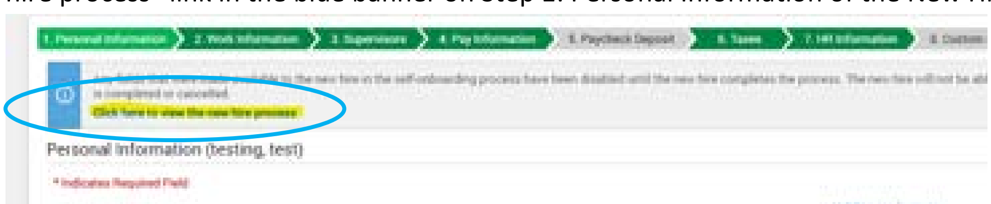
Monitoring Self-Onboarding Progress

After the Self-Onboarding invitation is sent a new hire, you can monitor their Self-Onboarding progress from the New Hire Queue.

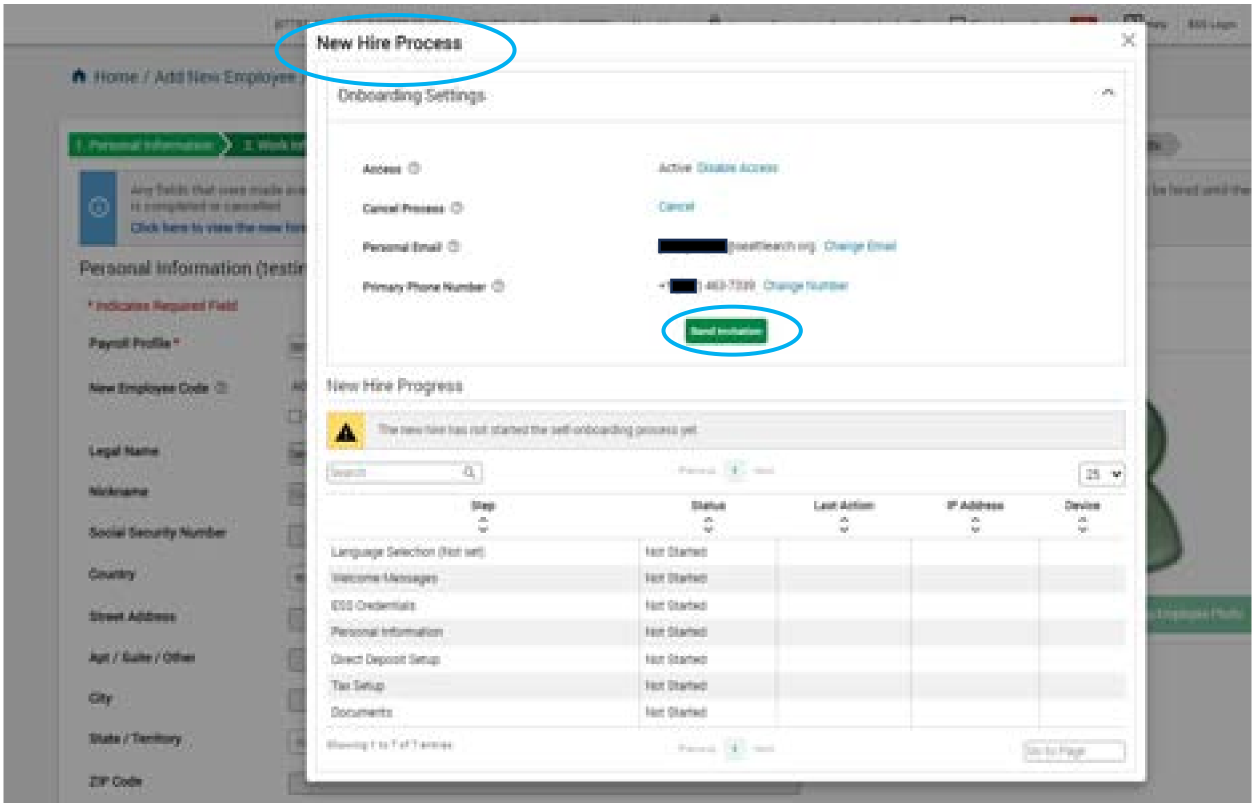
Find your employee in the Pending New Hires list by either using the search bar or scrolling through to find their name. Click the icon in the Details column which will open a pop-up window.



You can also view the new hire's Self-Onboarding progress by clicking the "Click here to view the new hire process" link in the blue banner on Step 1: Personal Information of the New Hire Guided Setup.



The following pop-up window displays, allowing you to view the steps of the Self-Onboarding process, status of the step, time of last action, IP address and the device where the action took place.



This window also allows you to update the cell phone number or email used to send the invitation to your employee.

Tip: Make sure to resend the invitation if the cell number or email is changed to ensure your employee receives the email from Paycom.

Guided Setup

Select the employee's name to begin the setup. There is a lot of information throughout the setup that

will fill automatically for your convenience. Please leave the auto filled fields as is unless you have a question to discuss with HR regarding an individual's setup.

Tab 1. Personal Information

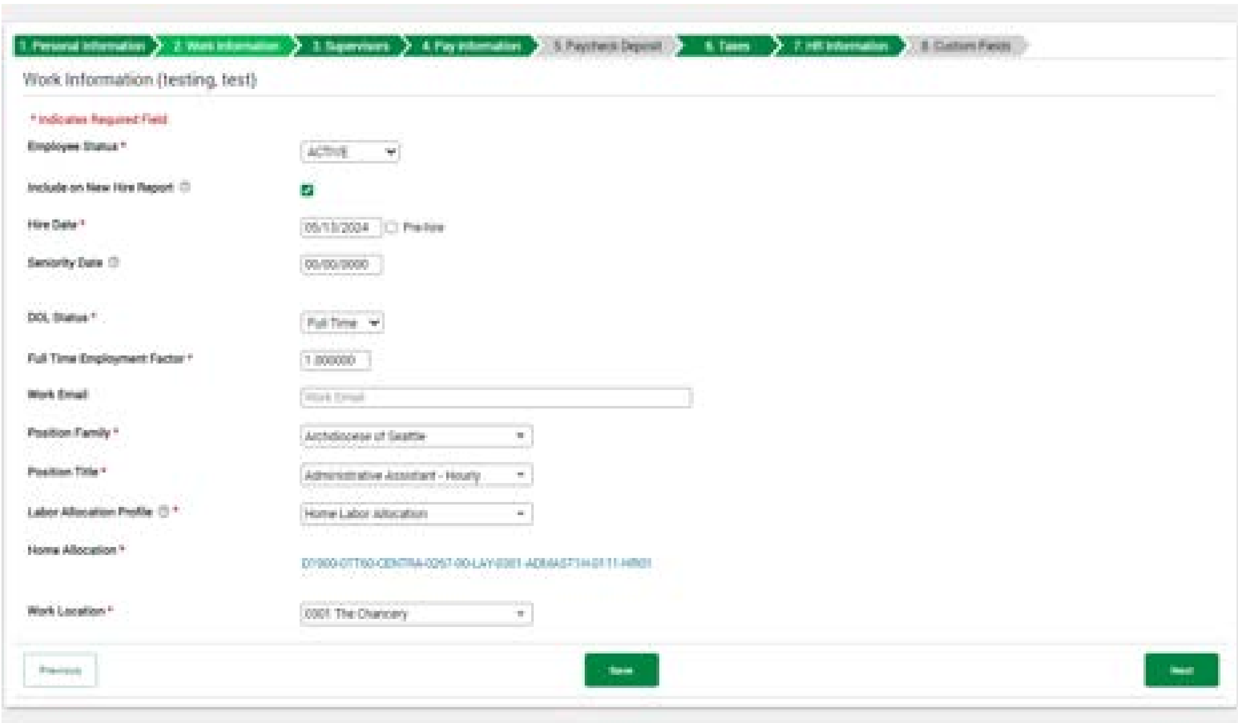
Employees will complete the first tab containing their personal information. This cannot be edited by administrators.

Administrators will begin on T**ab 2. Work Information.**

Tab 2. Work Information

The page can be saved and worked on later once all values have been completed on each page.

Enter in the required information marked with an asterisk, beginning with hire date.



DOL Status: Choose the option from the drop-down menus – Fulltime, Part-time (under 60 hours/ pay period), Seasonal, Temporary.

Full Time Employment Factor (FTE): this will correspond with the hours the employee works per pay period. 1.0 = 80 hours per pay period. Find the FTE by dividing hours worked by 80 (example: 35 hours per pay period divided by 80 = .4375 FTE.

Position Family: **<u>Always</u>** choose Archdiocese of Seattle

Position Title: Type in the search box to choose the title for the position from the drop down.

Labor Allocation Profile: **<u>Always</u>** choose **Home Labor Allocation**

Home Allocation: Click the blue text to open a pop-up window to fill in the following information.

- **Department:** If you know this, enter, if not contact your Bookkeeper or PAA, if not used: select NONE(Z)

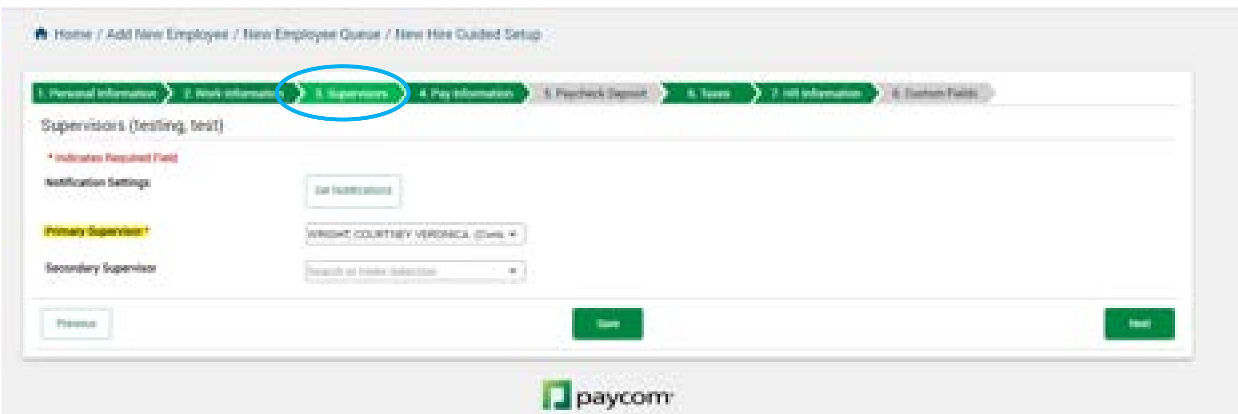
- **Org Level 1:** Select the most appropriate option from the list a Parish will choose Parish for example.
- **Ord Level 3:** If you know this, enter if not contact your bookkeeper or PAA, if not used: select **NONE(Z)**
- **Employee Type**: Most employees will be lay (non-religious), review the list to be certain.
- **Location**: Select the main work location from list.
- **Job**: Select the job that aligns with the position you chose. If you do not know contact HR@seattlearch.org
- **Fund**: most locations do not use this except the chancery, please select **UNASSIGNED** or contact HR with questions.

SCROLL DOWN in the popup window.

- **Supervisor**: Choose the actual supervisor of this job, if they are not in the drop down and do not use Paycom, this often happens with the priest being the supervisor, then choose the supervisor of payroll/Paycom.
- Then click **SAVE.**

After entering in all the required information on the Work information tab, select NEXT to save the page and move to the next tab.

Tab 3. Supervisors

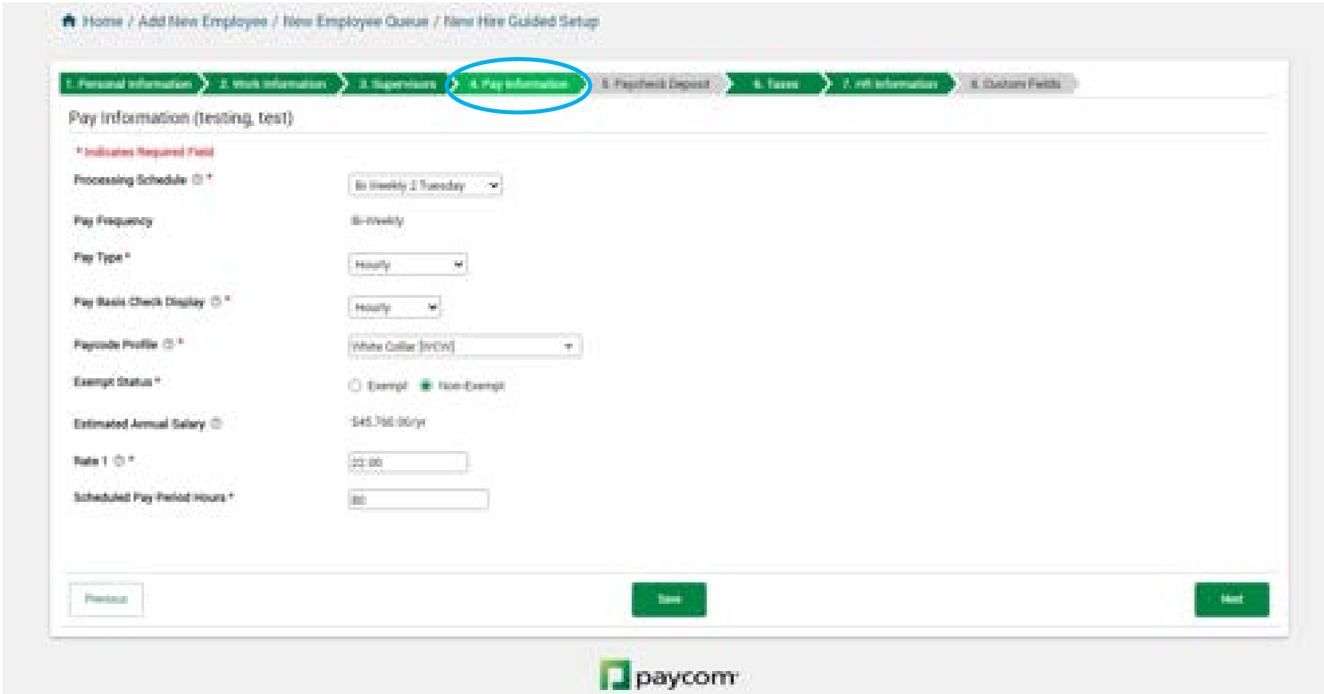


Choose the primary supervisor from the drop down if the name listed is not accurate. This field should automatically fill with the name used on the requisition posting.

Some locations have a secondary supervisor, this will not automatically fill. Select the name if applicable, from the drop-down menu.

Click **Next** to save the page and move forward with the setup or select Save to save the current page and return later.

Tab 4. Pay Information



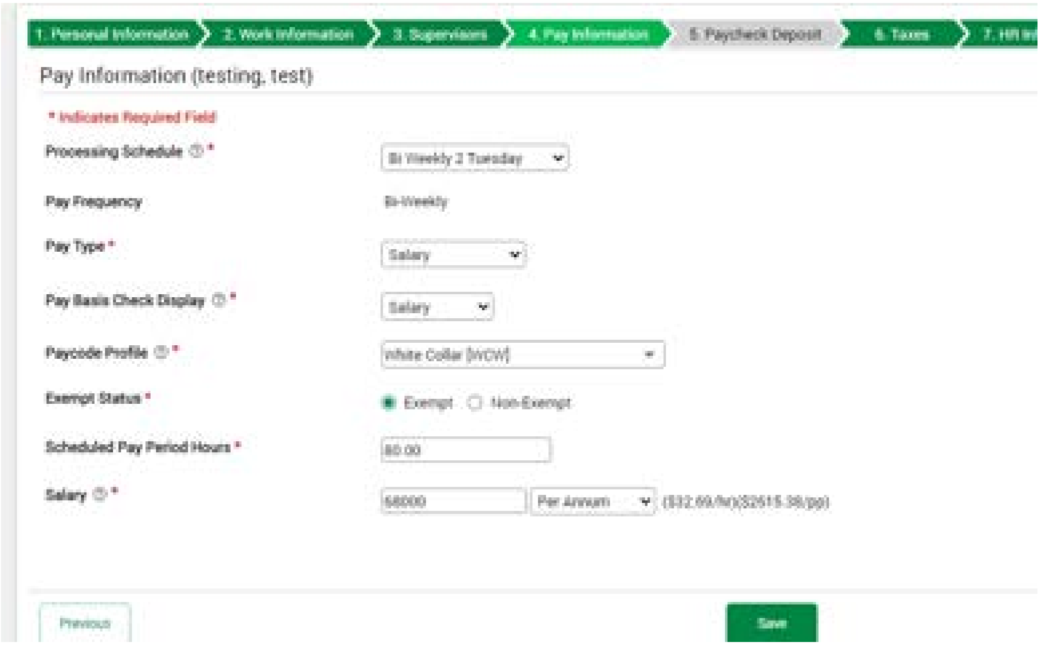
Fill in the required fields beginning with the Processing Schedule.

Processing Schedule: Most locations will choose Biweekly 2 (pay group 2) Tuesday.

Pay Type and Pay Basis Check Display: This will correspond with the position selected in tab 2's set up of the Work Information for the employee. If you have an Hourly employee both will be hourly.

Pay code Profile: will auto-select based on the position chosen in Tab 2. Work Information.

Exempt Status: will correspond with the position and Pay Type. If there is a salaried position, the status will be exempt, Hourly position will be non-exempt. These will never change.

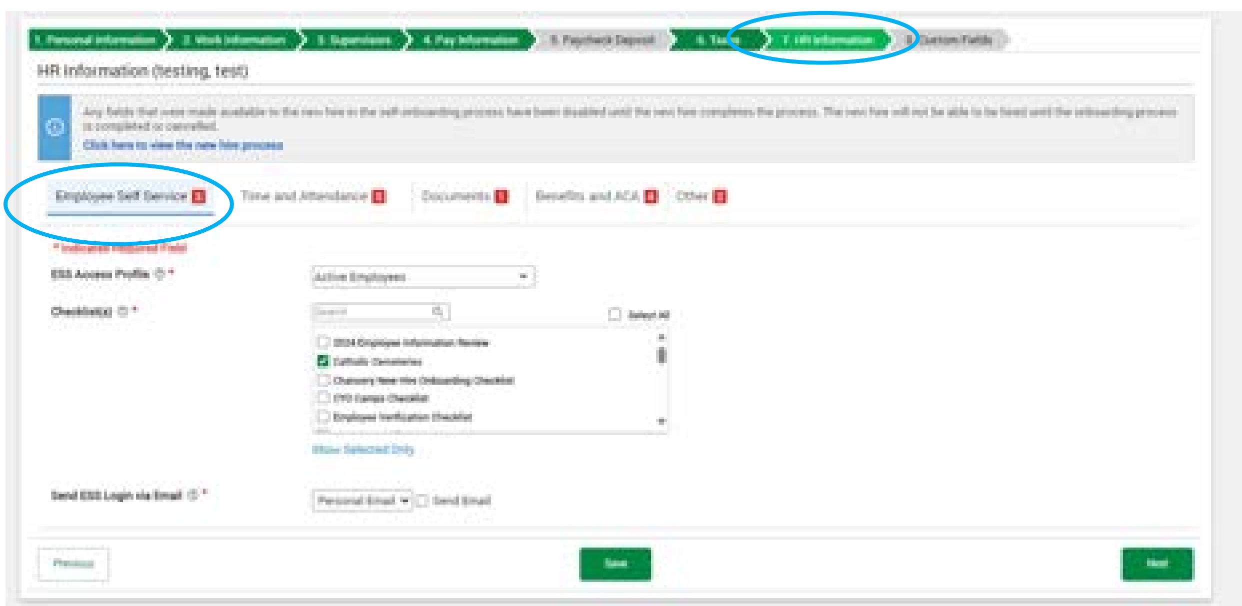


Rate 1: Enter the rate that was agreed upon between you and the employee.

The rate basis will match the Pay Type chosen above. If it is hourly the rate should be in the wage earned per hour. If it is salaried, it will be the salary per annum(year). See screen shot for the Salary set up.

Tab 5 Paycheck Deposit and **Tab 6 Taxes** will be completed by the employee. Move forward to Tab7.

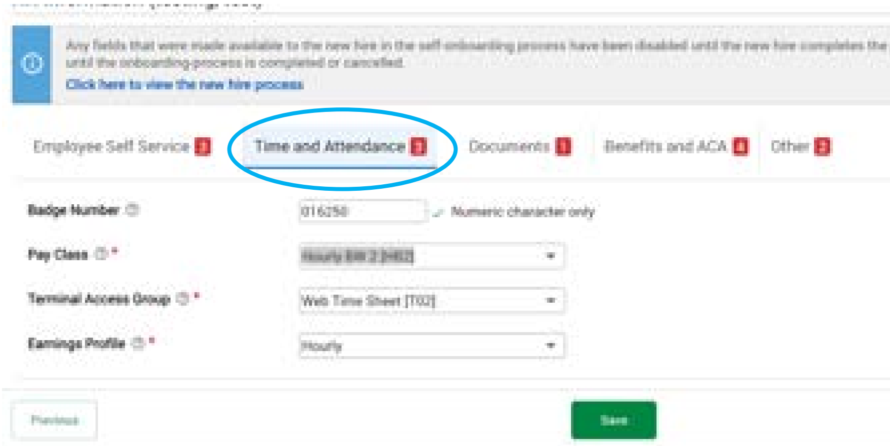
Tab 7. HR Information



Employee Self-Service

Begin by selecting the checklist for the employee to complete once the employee self-onboarding has been completed. Employees will have access to complete the assigned checklist items once they are hired into the system.

Once this has been selected, **DO NOT CLICK SAVE OR NEXT YET**! Move to the next step.



Time and Attendance

Badge Number: will fill automatically, **do not edit this field**.

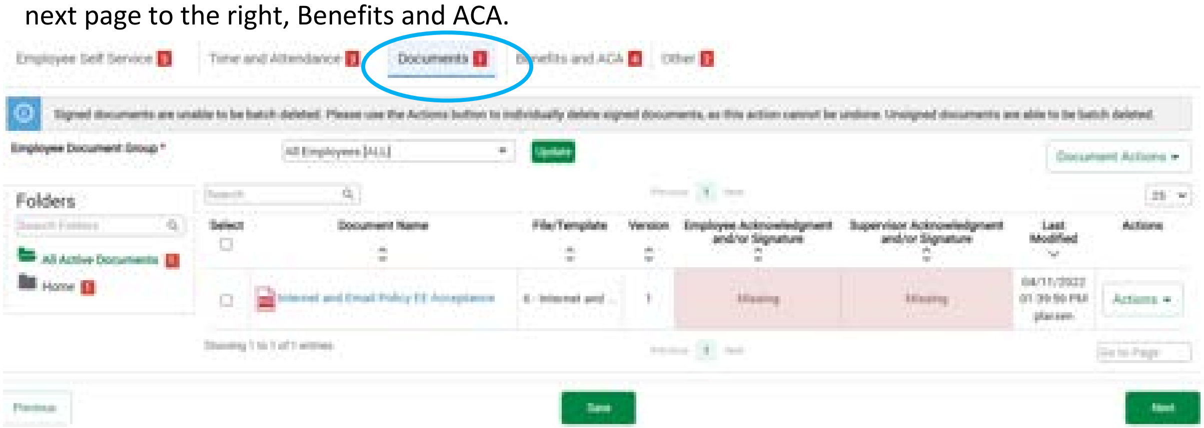
Pay Class: Choose the corresponding code from the list. For example, an hourly employee in Pay Group 2 will be Hourly BW 2 [HB2].

Terminal Access Group: This is how employees track their time. Most hourly employees use the **Web Time Sheet**, if you utilize the clock system, keep in mind it should be used for all hourly employee to remain consistent. Salaried employees will use the Salary Sheet in the drop-down menu.

Earnings Profile: This will default to Hourly, if your employee is Salary, choose it from the list.

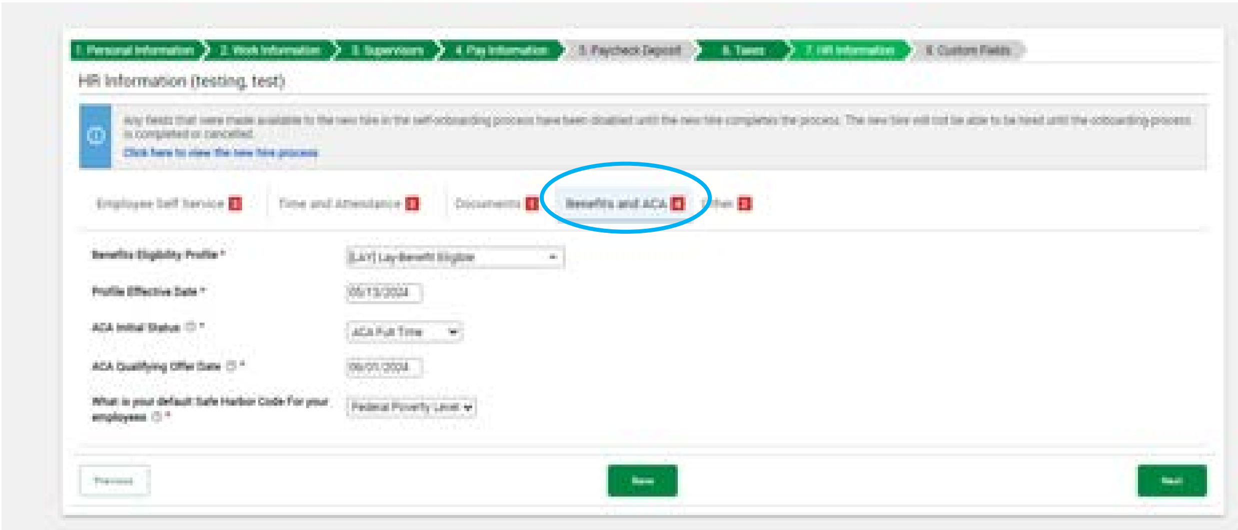
Documents:

This tab does not include any fields that will be altered or edited in the onboarding process. Skip to the next page to the right, Benefits and ACA.



Benefits and ACA

Your benefit selection will determine the benefits. If you have questions, contact benefits or HR for help if you do not know the benefits selection for your new hire.



Profile effective date will automatically populate with the first date of the following month of hire.

ACA Initial Status: If your employee is scheduled to work under 30 hours per week choose ACA Variable Hour (not pictured).

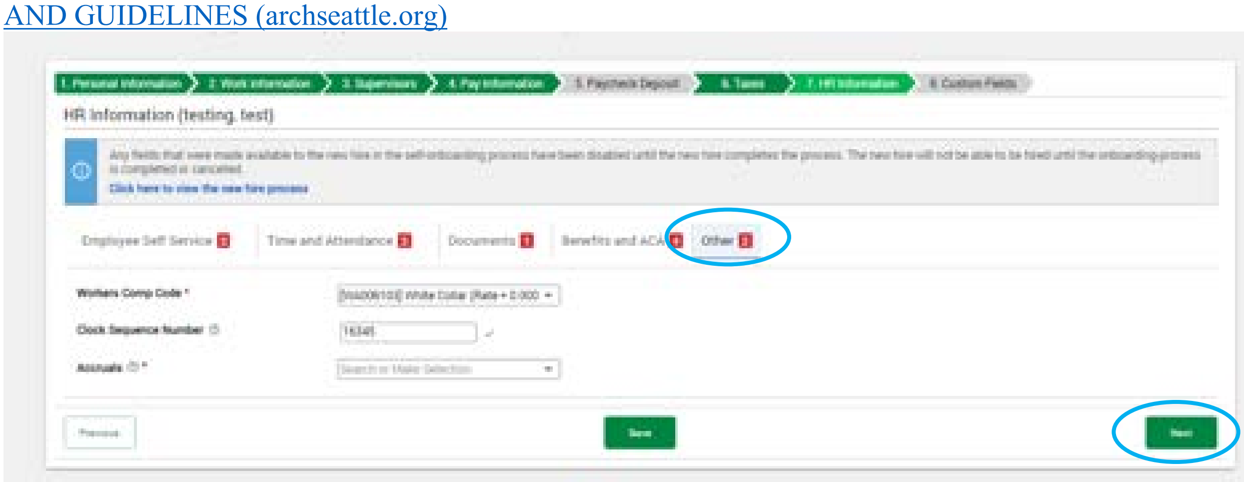
Note: If your employee is scheduled to work 30 or more hours per week choose ACA Full Time.

The Safe Harbor Code will auto select Federal Poverty Level. **Do not adjust this.**

After selecting and filling all fields, select the final section – Other.

Other – this is where you will enter the Accrual package. Please **do not change** the **Clock Sequence Number OR the Workman's Comp Code**. These are automatically set and should not be altered.

The accrual package will be chosen based on policy. Please refer to the Parish Personnel Policies linked here for more: [HUMAN RESOURCES: PARISH PERSONNEL POLICIES AND GUIDELINES (archseattle.org)]



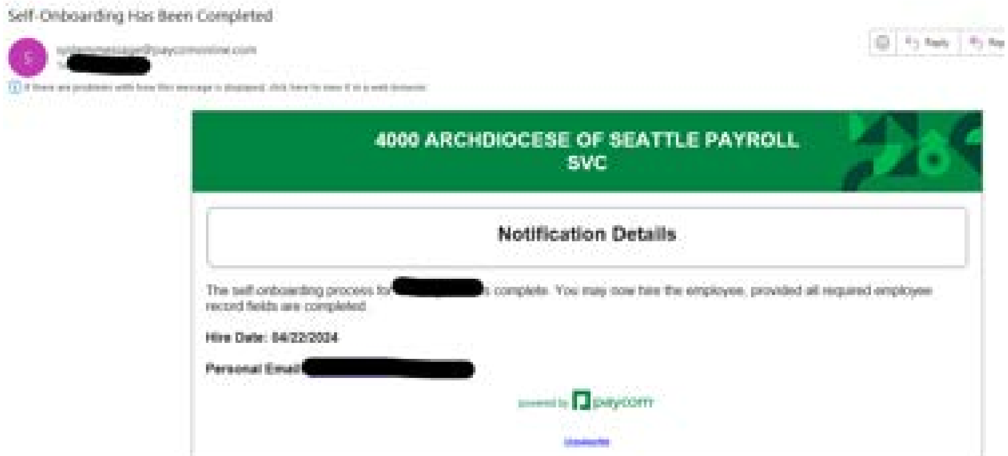
Once all information is complete, select next to move to the final portion of the employee set up. This will save Tab 7's set up.

Tab 8. Custom Fields

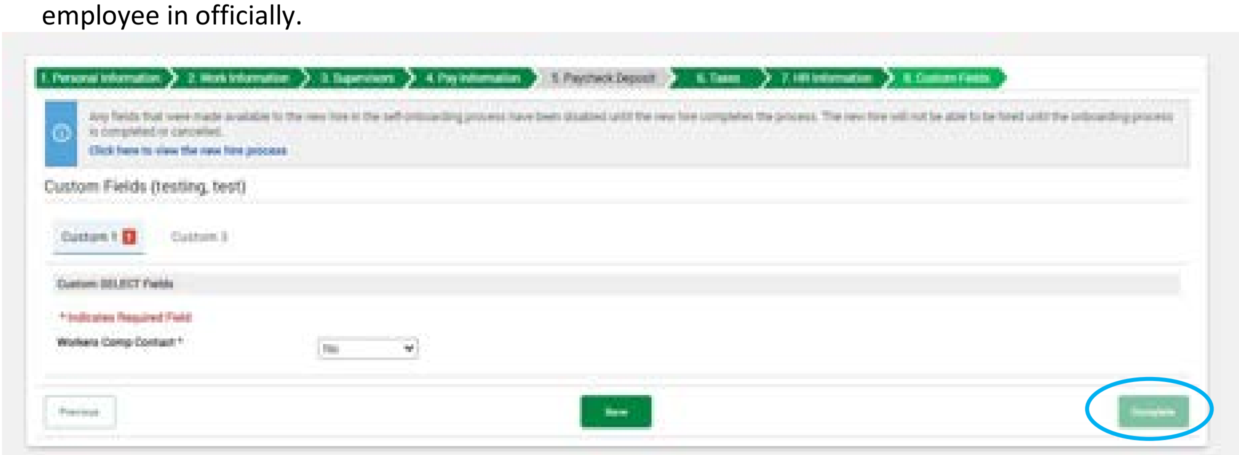
Unless you are the Chancery you do not have to fill out anything further on this page.

If you notice that the Compete Button is light green and unable to be clicked this means that the new employee has not finished their portion of the self-onboarding. Please connect with your employee and remind them to finish setting up their profile in Paycom as soon as possible.

When the employee completes their portion of the self-onboarding process, the information completer who sent the original invite to begin the onboarding will receive a system email from



Paycom. When you receive this message, log into complete the process and hire the employee in officially.



After clicking complete let the system generate the New Hire without disturbing the screen. When it is complete the new employee will be in your Payroll and can be found under **Make Employee Changes** section.

*Tip: The system may take time to update. It may take time for the employee to be findable in *Make Employee Changes*. If they do not show up for you, log out and log back into your client access or try refreshing the page.