Chairing a Search-AAF (Search Chair)

ACADEMIC STAFF/ADMINISTRATORS/FACULTY (AAF)
PEOPLEADMIN ONLINE HIRING SYSTEM
UW RIVER FALLS
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Last updated: April 28, 2016
PeopleAdmin Online Recruitment System

Academic Staff/Administrators/Faculty

Chairing a Search

(Search Chair)

Introduction

Congratulations, you have been named as Chair of a Search Committee for UW River Falls. Thank you for your willingness to serve. This document focuses on the details that a Search Chair needs to know in order to manage a search within PeopleAdmin, UWRF’s online recruitment and hiring system.

For more information on the full AAF process and step by step guides for each role (including Search Committee Members/Guest Users), go to https://www.uwrf.edu/HumanResources/Hiring.cfm, login with your Falcon Account and click on Unclassified (Academic Staff/Administrators/Faculty). Because this information requires a Falcon Account to view, you may need to provide the Applicant Review document to community members serving on your committee.

Prior to Search Chair Involvement

Prior to your involvement as Search Chair, the following have likely taken place:

- Hiring Manager created a posting in PeopleAdmin and submitted it for approval.
- The posting request was electronically routed for approval to recruit and fill in the following sequence: Dean/Director > Budget Office > Chancellor/Provost > Human Resources
- Upon being approved, the posting was assigned to you (Search Chair) and Human Resources contacted you to discuss the search and conduct Search Chair and Search Committee Member training as needed. Depending on when you were added to the posting as Search Chair, you also received an automated email notification from PeopleAdmin.

This is where your role as Search Chair starts

Search Chair Review/Update of Posting (before publicly posting)

Login to PeopleAdmin

After your meeting with Human Resources, you may log into PeopleAdmin to view (and possibly update) the posting before it is made public.
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Chairing a Search

(Search Chair)

Check your Role
Check to make sure that you are in the role of Search Chair. If you are a department head or above, your login may default to a different role. If needed, change your role to Search Chair using the dropdown. Once you change your role, you should see a green notification across the top of your screen.

Viewing the Posting
Once in PeopleAdmin, go to your Inbox and locate the posting on which you are Search Chair. Click on the Job Title to view the posting.

Reviewing and Updating the Posting (before public posting)
As you review the posting, keep in mind that the posting has already been approved by Administration, so no substantial changes beyond what is noted below should be made without contacting HR to discuss.

In some situations, the Search Chair will only be reviewing the posting at this point, and not editing. If you are unsure about the actions you should take, please talk with the Hiring Manager.

Posting Detail Section
If there were delays with the posting, you may need to update the Open Date and Applicant Review Date and Save. Attached posting documents containing those dates will also need to be updated and reattached. Consult with HR if you have questions or believe updates are needed to any other field in this section. It is recommended that you make note of the Applicant Review date and add it to your calendar.
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If you do need to modify any part of the posting, click on Edit next to the Posting Details Header.

![Posting Details Edit](image)

Figure 4: Edit Posting Details

Click on Next to proceed to the next section of the posting.

Supplemental Questions

Review any questions that the Hiring Manager believed would be helpful in the applicant review process.

If you would like additional questions to be added to the posting, please consult with Human Resources. Click on Next to proceed to the next section of the posting.

Posting Documents

Many of the posting documents have been preloaded by the Hiring Manager. If needed, the Search Chair must attach any remaining or revised required documents associated with this search (at least the ones highlighted in red in the figure below). Next to the desired Document Type, click on Actions and select either:

- **Upload New** if you have a document already created
- **Create New** if you would like to create the document using a text editor within PeopleAdmin.

*For Faculty searches, there is an opportunity to wait and send any remaining document (interview questions, reference check questions, etc.) to HR for approval by HR & EEO and final upload between the time the position has been posted and before applicant pool review by EEO.*

![Posting Documents attachment area](image)

Figure 5: Posting Documents attachment area

Click on Next to proceed to the next section of the posting.

Guest User

This is where access was granted for students or off-campus persons serving on a search committee. If any non-employees that are on your search committee are not listed, click on Edit, add them and Save.
Click on **Next** to proceed to the next section of the posting.

**Search Committee**
This is where access was granted for employees serving on a search committee. For Academic searches, the Academic Department Chair should also be listed as a Search Committee Member in order to grant applicant viewing privileges. If any employees that are on your search committee are not listed, click on **Edit**, add them and **Save**.

Click on **Next** to proceed to the next section of the posting.

**Ranking Criteria**
This functionality is not yet being used by UWRF.
Click on **Next** to proceed to the next section of the posting.

**Summary**
A summary of the posting will appear. Scroll down to review for completeness and accuracy.
- If you need to modify, click on the **Edit** found at the top of the desired section or at the top of the page.
- It is recommended that you click on the yellow star with **See how this posting looks to applicant** to see what will appear on the portal. Not all posting fields appear on the public posting. **To exit that view, click on the job title in the breadcrumbs at the top of the screen.**
  - If you need to wait and come back to the posting later, select ‘Keep working on this posting’.

Once satisfied the posting is ready to be publicly posted, click on the orange **Take Action on Posting** button and select **Send to EEO Review (move to EEO Review)**.

![Figure 6: Send posting to EEO for Review](image)

You may wish to check the box to **Add this posting to your watchlist** for ease of monitoring in the future. Once you have moved the posting forward into the workflow, you will lose editing rights to the posting.

![Figure 7: Add posting to watchlist when moving it in the workflow](image)
Upon the posting being successfully moved in the workflow a green bar and success message will appear on the top, and the orange 'Take Action' button will disappear. EEO will receive an automated email indicating that a posting is ready for review and approval.

**Figure 8: Posting successfully transitioned to next step**

**Posting the position (Human Resources)**
Once EEO has approved the posting and interview documents, EEO will move the posting to HR, who will do a final review and publicly post the position. At that time, the posting will be available to applicants on [http://jobs.uwrf.edu](http://jobs.uwrf.edu) and they may apply online.

**Monitor and Approve the Applicant Pool**
Upon reaching the **Applicant Review Date**, but before full review of all candidates, you must submit the applicant pool to EEO for approval. To access the posting, either click on the job title found in your ‘Watch List’ or find the posting under the tab Postings > Academic Staff/Administrators/Faculty submenu.

If desired, review all applications received to date. By clicking on the line for the desired job title, click on the ‘Actions’ button and select ‘View Applicants.’ Select the ‘Action’ dropdown on the row and then ‘View Application’ individually for each applicant.

**Figures 9a and 9b Viewing list of applicants and individual applicant materials.**

If you are satisfied that the pool is sufficient, forward all applicants to EEO for approval. On the **Applicants** tab, **check or select** all applicants then using the **Action** button popup window, under ‘**Bulk**’ select ‘**Move in Workflow**.’ Then, from the **Change for all applicants** drop down, select **EEO Review of Pool**. It may take a moment for the move to take be completed. Upon a successful transition, all applicants should be in the new status of **EEO Review of Pool**. If not, please resubmit using the instructions noted above.

**Figures 10a and 10 b: Action to move applicants and selecting new applicant status of EEO Review of Pool**
EEO will not receive automated notification that you have submitted the pool of applicants for review, so please call or email EEO to notify. Likewise, you, as Search Chair will not receive an automated email when the applicant pool has been approved, so you will need to watch for applicant status change to Pool Approved or ask EEO to contact you when the pool has been approved.

After pool approval, verify all final interview documents have been added to the posting (send to HR to attach if needed). Once the pool has been approved, you must contact HR to request/verify that the posting be ‘Closed and removed from the web.’
Applicant Review, Interview & Selection

Once the pool has been approved, the real work of the Search Chair and Search Committee begins. For information on how to review applicant materials within PeopleAdmin, the members of your committee should refer to the Applicant Review (Search Committee Member/Guest User) document on: https://www.uwrf.edu/HumanResources/Hiring/UnclassifiedHiringSteps.cfm.

Applicant Status

As Search Chair, it is your responsibility to keep the status of all applicants updated throughout the search process until the committee reaches agreement on whom to recommend for hire.

Available Applicant Statuses

The various statuses that applicants can have during the search process are listed below.

Most status changes initiate an automated email to the applicant at some point in the process. See separate document on https://www.uwrf.edu/HumanResources/Hiring/UnclassifiedHiringSteps.cfm for the text of automatic email messages sent to applicants as a result of status changes and timing of when the message is sent.

Status while reviewing materials and interviewing

- **Pool Approved** – initial status that indicates applicant was included in the pool reviewed by EEO; no email sent to applicant
- **Not interviewed Not hired** – Requires reason code, immediate email to applicant
- **Selected for phone screen** - no email sent to applicant
- **Selected for personal interview** - no email sent to applicant
- **Reference check** - no email sent to applicant

All non-selected applicants must have a final status assigned to them prior to changing the status of the finalist(s) to Recommend for Hire.

Final statuses

- **Interviewed not hired** – Requires reason code, email to applicant once posting is filled
- **Not interviewed Not hired** – Requires reason code, immediate email to applicant
- **Alternate finalist** – email to applicant once posting is filled
- **Recommend for Hire** – no email to applicant

Updating Applicant Status

While viewing the posting, on the Applicants tab, check the box next to each applicant you would like to move. Using the **Action** button popup window, under **Bulk** select **Move in Workflow**. Watch the ‘Workflow State (Internal)’ column to verify which status each applicant currently has and select the desired ‘New State’ for each. Depending on the number of applicants moved, this may take some time – be patient!
Making a Recommendation and Closing the Search

After moving an applicant to **Recommend for Hire**, the Chair sends the ‘Narrative’ of strengths and weaknesses to the Hiring Manager via email. Lastly, the Chair collects all applicant screening tools and reference check notes from all committee members to forward to HR. (See Search & Screen Chair Checklist available from HR).

If a search is failed or canceled, *do NOT update* applicant status. Please contact HR to move the posting to a ‘Canceled’ status. At that time, applicants will receive an email indicating the recruitment has been canceled.

Completion of these tasks conclude the responsibilities of the Search Committee and Search Chair.
APPENDIX

**“Not Hired” Reason Codes**

*Anytime an applicant has a status changed to *Not Interviewed, Not Hired* or *Interviewed, Not Hired*, an appropriate reason that best describes why the applicant was not hired is required. Below is a table of the “...Not Hired” reason codes your committee may select from.*

<table>
<thead>
<tr>
<th>Reason Description</th>
<th>Reason Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area of secondary competence not compatible with the needs of the department as advertised</td>
<td>Did not complete application process</td>
</tr>
<tr>
<td>Area of specialization of interest does not fit with the needs of the department</td>
<td>Did not have sufficient technical competence in the primary area</td>
</tr>
<tr>
<td>Candidate did not demonstrate superior ability to perform the position's key tasks</td>
<td>Did not meet minimum qualifications in one or more areas (specify)</td>
</tr>
<tr>
<td>Candidate has less relevant education and/or training for this position</td>
<td>Does not meet minimum qualifications</td>
</tr>
<tr>
<td>Candidate has less relevant experience for performing the duties of this position</td>
<td>Failed to show for interview</td>
</tr>
<tr>
<td>Candidate has not worked in a similar position</td>
<td>Insufficient publication (or composition, or exhibition) record</td>
</tr>
<tr>
<td>Candidate not interested in the teaching component of the position</td>
<td>Insufficient teaching experience</td>
</tr>
<tr>
<td>Candidate well qualified but not as strong as recommended candidates</td>
<td>Lacks required certification(s)/license(s)</td>
</tr>
<tr>
<td>Candidate well qualified. Alternate if top candidate(s) decline. (Used for top 2-3 candidates)</td>
<td>Lacks required educational background</td>
</tr>
<tr>
<td>Candidate withdrew</td>
<td>Lacks supervisory experience</td>
</tr>
<tr>
<td>Candidate's experience was outside the primary responsibilities of the advertised position</td>
<td>No record of obtaining external funding (Person selected met job requirement)</td>
</tr>
<tr>
<td>Cannot meet applicant salary requirements</td>
<td>Not interested</td>
</tr>
<tr>
<td>Conflict of interest</td>
<td>Not willing to commit to contracted time</td>
</tr>
<tr>
<td>Contributions in service area insufficient (state/nat'l orgs and/or dept/univ committees)</td>
<td>Other</td>
</tr>
<tr>
<td>Creative artwork (or musical composition) judged inadequate by the research committee</td>
<td>Requires relocation package</td>
</tr>
<tr>
<td>Declined offer</td>
<td>Research does not support teaching assignment</td>
</tr>
<tr>
<td>Degree in a field not compatible with the needs of the department</td>
<td>Research/publications not related to position as advertised</td>
</tr>
<tr>
<td></td>
<td>Seminar/lecture failed to demonstrate scholarly substance</td>
</tr>
</tbody>
</table>