Panel Lead- University Staff (Hourly) (Search Chair)

UNIVERSITY STAFF (HOURLY) PEOPLEADMIN ONLINE HIRING SYSTEM

UW RIVER FALLS
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Introduction
Congratulations, you have been named as Panel Lead, thank you for your willingness to serve. This document focuses on the details that a Panel Lead needs to know in order to manage selection within PeopleAdmin, UWRF’s online recruitment and hiring system.

Note: certain terms (Search Chair/Search Committee Member are standard PeopleAdmin terms that reflect Panel Lead/Panel Member roles).

For more information on the full University Staff (Hourly) process and step by step guides for each role (including Panel Member/Guest Users), go to https://www.uwrf.edu/HumanResources/Hiring.cfm, login with your Falcon Account and click on University Staff (Hourly) > Panel Lead. Because this information requires a Falcon Account to view, you may need to provide the Applicant Review document to community members serving on your panel (if applicable).

Prior to Panel Lead Involvement (if Lead is not Hiring Mgr.)
Prior to your involvement as Panel Lead, 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 (Panel) and Human Resources contacted you to discuss the search and conduct Panel Lead and Panel Member (Search Committee Member) training as needed. Depending on when you were added to the posting as Panel Lead, you also received an automated email notification from PeopleAdmin.

This is where your role as Panel Lead starts.

Panel Lead 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.

Login at https://jobs.uwrf.edu/hr

Figure 1: Login page
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.

![Image: Tabs available under Search Chair role & Changing Roles]

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

![Image: Selecting a posting from Inbox]

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 Panel Lead 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 Closing Date and Save. 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 Closing Date and add it to your calendar.

If you do need to modify any part of the posting, click on Edit next to the Posting Details Header.
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 Panel Lead must attach any remaining or revised required documents associated with this recruitment (at least the ones highlighted in red in the figure below. Other documents that may be used are Phone Screen Questions or Assessment Tool, depending on the vacancy.) 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.

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

Guest User

This is where access may have been 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.
PeopleAdmin Online Recruitment System

University Staff (Hourly)

Panel Lead
(Search Chair role)

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

Search Committee (Panel Members)
This is where access was granted for employees serving on Recruitment and Selection Panel.

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 Human Resources Final Review (move to Human Resources Final Review).

Figures 6a and 6b: Transition posting and add posting to watchlist when moving it in the workflow

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.

Posting the position (Human Resources)
The posting will be transitioned 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 and they may apply online.

Monitor and Approve the Applicant Pool
Upon reaching the Closing 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 > University Staff (Hourly) submenu.
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**. Depending on the number of applicants being moved, 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.

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 Panel Lead 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). You may now begin the review process.
Applicant Review, Interview & Selection

Once the pool has been approved, the real work of the Panel Lead and Panel Members begins. For information on how to review applicant materials within PeopleAdmin, the members of your committee should refer to the Applicant Review (Panel Member/Guest User) document on: https://www.uwrf.edu/HumanResources/Hiring/Steps-in-Filling-A-University-Staff-Hourly-Position.cfm.

Applicant Status

As Panel Lead, 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. Applicants can be moved individually or in bulk as long as any reason codes (if applicable) are the same.

Available Applicant Statuses

The various statuses that applicants can have during the selection 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/Steps-in-Filling-A-University-Staff-Hourly-Position.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
- **Finalist Pending** - 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 (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
- **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 Buld 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, again, this may take some time – be patient!
Unique to University Staff (Hourly) – after completing interviews, the panel will decide who will be moved to ‘Reference Check’ (top candidate) and who will be moved to ‘Finalist Pending’ (alternate candidate(s) should additional candidates need to be considered).

Completion of these tasks conclude the responsibilities of the Panel Members and Lead. The workflow is now managed by Hiring Manager.
## 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 panel may select from.*

<table>
<thead>
<tr>
<th>Reason Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Not applicable to University Staff Area of secondary competence not compatible with the needs of the department as advertised</strong></td>
<td>Did not complete application process</td>
</tr>
<tr>
<td><strong>Not applicable to University Staff Area of specialization of interest does not fit with the needs of the department</strong></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><strong>Not applicable to University Staff</strong> Insufficient publication (or composition, or exhibition) record</td>
</tr>
<tr>
<td><strong>Not applicable to University Staff Candidate not interested in the teaching component of the position</strong></td>
<td><strong>Not applicable to University Staff</strong> 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><strong>Not applicable to University Staff</strong> 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><strong>Not applicable to University Staff Contributions in service area insufficient (state/nat’l orgs and/or dept/univ committees)</strong></td>
<td>Other</td>
</tr>
<tr>
<td><strong>Not applicable to University Staff Creative artwork (or musical composition) judged inadequate by the research committee</strong></td>
<td>Requires relocation package</td>
</tr>
<tr>
<td>Declined offer</td>
<td><strong>Not applicable to University Staff</strong> Research does not support teaching assignment</td>
</tr>
<tr>
<td>Degree in a field not compatible with the needs of the department</td>
<td><strong>Not applicable to University Staff</strong> Research/publications not related to position as advertised</td>
</tr>
<tr>
<td></td>
<td><strong>Not applicable to University Staff</strong> Seminar/lecture failed to demonstrate scholarly substance</td>
</tr>
</tbody>
</table>
PeopleAdmin Online Recruitment System

University Staff (Hourly)

Panel Lead

(Search Chair role)