Academic Recruitment E-learning Tutorial

for Non-Senate Academic Recruitments

Dear Academic Personnel Analyst,

Thank you for participating in the Academic Recruitment self-learning tool. The purpose of this tutorial is to teach you how to use AP Recruit to conduct non-senate academic recruitments.

Your role in non-senate academic recruitment is to assist the individual or committee conducting the recruitment by:

- **Setting up the recruitment:** The “Search Plan,” including assistance in writing the advertisement, and ensuring that the PI or search committee understand all required policies and procedures for conducting searches, as specified in the Non-Senate Search Guide;
- **Running the search**: Support with placing advertisements and conducting outreach, initial review of candidate basic qualifications, instructing committee members as needed on how to review candidates and leave comments, maintaining up-to-date AP Recruit statuses for all candidates, supporting logistics with interviews and campus visits, uploading evidence of advertisements and outreach, entering candidate disposition reasons;
- **Closing the search**: The “Search Report,” including the search outcome, information about the proposed candidate, all candidate statuses and disposition reasons, advertisement evidences, and instructing the PI or committee on the search committee narrative;
- **Concluding the search:** Changing final applicant statuses, entering a final search outcome, concluding the search.

Contact the Office for Faculty Equity & Welfare (ofew@berkeley.edu) to begin the tutorial. We will need to set up a fake recruitment in our test site for you to complete the exercises. If you already have access to AP Recruit do not use that system for this tutorial.

How to use this tutorial:

This tutorial consists of six lessons that cover the major categories for the AP Recruit analyst to know. Please allow a total of three hours to complete the entire training. It is possible to do the training in multiple sessions.

After you complete the exercises within the lessons be sure to contact us so we can review your work on the AP Recruit test site and activate your AP Recruit account in the “live” site.

Log into AP Recruit Training

1. Navigate to **AP Recruit's Training Site**.

2. Click the link, ***UC Berkeley Faculty & Administrators***

3. Enter your **CalNet ID and password**.

4. Verify you are logged in by looking for your name at the top-right of AP Recruit's home page.

5. Click the **Help tab** on the right side of the menu. Notice that a new tab opens up with the help section of AP Recruit. Keep this tab open while you work through the tutorial.

6. Open the **Search Guide for Non-Senate Academic Recruitments**.

You will need to refer to this Guide throughout the tutorial. Please note there is a similar guide for Senate Faculty Recruitments. If you will be supporting both types of recruitments you will also need to review the Senate Faculty Search Guide at another time.

The **Non-Senate Search Guide** provides the necessary information to understand the *what* and *why* of academic recruitment. The **Help section** of AP Recruit provides the mechanics of using the AP Recruit system.

Contents

PART I

Lesson 1: Setting Up a Recruitment

Prior to beginning this lesson, please read the **Summary of Overall Requirements and Timelines for Non-Senate Searches** webpage. Also have the **Non-Senate Search Plan Checklist** open as a reference for completing the steps to a successful search plan.

Create a Recruitment Plan

Assume that a faculty PI or department/unit/school/college has been given permission to recruit for an academic position.

1. Please read the **Overview for Creating the Search Plan** and **Basic Information about the Recruitment** sections of the search guide.

2. In the test site, move to the **Recruitments** page by clicking Recruitments in the top menu bar.

3. Click the button, **Create New Recruitment Plan**.

4. Fill in the Basic Information section (refer to the Search Guide section titled **Creating the Search Plan: Basic Information about the Recruitment** for information on how to correctly interpret and use these fields):

Recruitment Name —
•Name your recruitment "**Test Non-Senate Recruitment – Chemistry - your last name"** (enter your own last name so the recruitment can be identified later)

(In an actual search the recruitment name would be "name of position - subfield if applicable - department/unit/school/college name")

Description —
• LEAVE THIS FIELD BLANK. OFEW will use this field to post the approved advertisement.

Approved Search Area —
• LEAVE THIS FIELD BLANK for Non-Senate recruitments.

Department —
• Select "Chemistry" from the menu. Please note that the Test site does not have the full list of appropriate departments that are included on the live site

Salary Control Number —
•LEAVE THIS FIELD BLANK for Non-Senate recruitments.

5. Fill in the Application Submission Dates section.
All non-senate recruitments are "**Initial Review Date/Open Until Filled.**"

Click **Initial Review Date/Open Until Filled**.

Open Date —
• For this exercise **select today's date**. This is the date you want applicants to begin to apply. When completing an actual recruitment plan the open date should be about two to three weeks in the future to allow for approval of the Search Plan.

Initial Review Date —
• All recruitments must be posted for a minimum of 15 days. For this exercise select a date **at least 15 days out from today's date** (making sure that the University is open on that date (i.e. not a holiday or on the weekend). Please read **Application submission dates** in the Non-Senate Search Guide.

Final Date —
For this exercise **select two months from today**. This is the date when you will no longer accept applications. Please note that for actual searches the final date must be at least 30 days after the open date.

6. Fill in the Search Information section

a. Hover your mouse over the 'tool tip' for a description of *Search breath*.
b. Select **Open Search**.
c. In the *Initial search allocation* field, select **Newly allocated**.

7. Fill in the Optional Information section.

a. For this exercise, type your department's home page URL.
b. Click the **Next** button.

8. Fill in the Title Codes & Specialties.

Title Codes—

a. Start typing a title code in the box or enter part of a title's name, for example, "Specialist". The system will provide a menu.
b. *For this exercise,* **type 3330.**
c. You may enter up to 10 title codes. Put your cursor in the box and add another title code or two that you are familiar with. It is important to add all title codes that are applicable for the search - no changes can be made after the search launches and individuals can only be hired into the title codes that have been approved in the search plan.

Availability Data—

d. Put your cursor in the Fields of study box and select from the menu.
e. For this exercise, **choose Chemistry, other**.
f. You may add up to 5 specialties. Put your cursor in the box and add another specialty or two that you are familiar with.
g. Click the **Next** button when you are done.

9. Verify the Recruitment's Contact information:

a. Verify and edit (if necessary), your name and email address.
b. Verify and edit (if necessary), your department mailing address.
c. Click the **Next** button.

10. Confirm the basic information is correct.

- Click **Save & Done**.
- In the green box, *choose:* **Yes, Configure for Online Applicant Management**.

Configure for Online Applicants

Please read **Application Requirements**

The basic recruitment set-up is done but for your applicants to apply online, you will need to enter the requirements. **Important:** In an actual recruitment, remember to complete this section carefully. Most fields become locked after the first applicant has applied and only optional documents may be added at that point.

1. Read the **Overview** screen and click the **Next** button.

2. Complete the Documents requirements section (**the requirements added and language used to describe them must be exactly the same as in the advertisement**).

   Add —
   • Click the **Add** button.
   • For this exercise, name the new document **Extra Stuff**.
   • Select **optional**.

   Reorder—
   • Click the **Reorder** button.
   • Using your mouse, click **Cover Letter** and move this requirement to the top of the list. This will be the order the applicants will see when they apply.
   • Click **Save.**

   Delete—
   • Click the **Delete** link next to Misc./Additional
   • Confirm, **Yes, Delete.**

   Edit—
   • Click the **Edit** link for **Cover Letter**.
   • Click **Required**.
   • Click **Save**. Applicants will now be required to provide a cover letter.

3. Complete the References requirements (read **Letters of Reference** for more information about determining the need for references versus contact information). "**Only contact information**" is most common for non-senate searches. It is fine to solicit letters only from those considered finalists; if so, be sure to state this in the ad ("Letters of reference will only be solicited for finalists").

   Type—
   • For this exercise, select **Only contact information**.

   Number—
   • Select **3 - 5.**
   (This means your applicants would need to provide the contact information of at least three potential referees, but not more than five).

   Show References To—
   • This field gives you a chance to restrict reference viewing to certain groups within the search committee. For this exercise, **keep the default setting.**

   • Click the **Next** button to leave the documents & references set-up.

4. Fill in the Email Settings.

• Type in the address where you want to receive questions from applicants. (The "Contact Us" email will go here, yet the address will not be visible to the applicant.)

• The "Thank You" email is a fully customizable template that is automatically sent to references when their letters are uploaded into Recruit.

• For this exercise, add **your name** to the signature line of the letter.

• Click the **Next** button.

5. Check the Review Recruitment Screen for accuracy.

• If everything looks satisfactory, click **Save & Done**.

Lesson 2: Completing the Search Plan

Enter the Search Plan Information

1. Find your draft recruitment on the Recruitments page.
2. Click the link below it: ***Search Info***.

Details

Everything you inputted when you created the recruitment plan is on the **Details** screen, which is part of the Search info Tab. To edit, use the buttons available, or click *Edit Basic Recruitment* or *Update Online Requirements*.

Status indicators—

Familiarize yourself with the status indicators on the Details screen. Note that your plan is "Not submitted for approval" and your "Recruitment is not published." It cannot be opened to potential applicants until it is approved by OFEW.

The URL to include in ads: AP Recruit generates a unique apply address (URL). This is an important link so be sure to copy this URL for your ads, electronic postings, etc.

The required elements for the Search Plan are in the tabs on the left of the screen. For this exercise complete the information in each tab in order.

Diversity

Affirmative Action Goal —

Indicate which groups are underutilized for the job group by School. In an actual recruitment use the link '**Campus AA Goals'** for a table that indicates the Affirmative Action goals for the job group. Read "**Diversity Benchmarks and Goals**" for more information on this section, as well as to familiarize yourself with the difference between the diversity benchmark data and the Affirmative Action goals for a search.

1. Click **Add.**
2. For this exercise, choose **African American** and **American Indian**.
3. Click **Save changes.**

Advertisements

Advertisements are a crucial part of the Search Plan and require careful consideration; the language chosen affects how candidates are evaluated and who can be hired for the job. It is also important to ensure that the proposed advertisement contains all of the required elements before being uploaded.

Please thoroughly read the **Advertisement** section of the Search Guide and see the **Checklists and Templates webpage** for advertisement requirements and templates.

Planned Search & Recruitment Efforts —

The planned search & recruitment efforts are optional for non-senate searches, but please note that to use the shorter 15-day recruiting period the applicant pool must have at least 10 minimally qualified applicants. Recruitments with smaller pools will require the full 30-day open period.

Actual Search & Recruitment Efforts —

Optional: provide this information at the end of the search as part of the Search Report.

Advertisement Documents —

Upload your ad drafts and final ad copy here (.pdf, .txt, or image).

1. Click **Upload**.
2. For this exercise, **Choose File** any PDF file on your computer.
3. Click **Upload**

HERC Category —

1. Click **Add.**
2. For this exercise, select **Physical Sciences**.

3. Click **Save changes.**

Ad Sources —

Optional: List the various places where your recruitment will be advertised.

1. Click **Add.**
2. For this exercise, type **American Chemical Societ**y.
3. Click **Save changes.**

Qualifications

Creating the Search Plan: Applicant Qualifications

Basic, additional, and preferred qualifications are entered in this section. Please read **Applicant Qualifications** before completing this exercise. It is important to carefully consider the application requirements for a particular position, as they are locked once the search plan is approved, and individuals who apply cannot be considered if they do not meet the Basic Qualifications at the time of application and the Additional Qualifications at the time of employment.

For this exercise, remember we are using a "Chemistry Junior Specialist" (decided above with title code **3330**) as our example:

Basic—

1. Click **Add**.
2. Type **Must possess a bachelor's degree at the time of application.**
3. Click **Save changes**

Additional—

1. Click **Add.**
2. Type **Demonstrated experience in an academic research environment by time of hire.**
3. Click **Save changes.**

Preferred—

1. Click **Add.**
2. Type **Experience with protein directed evolution.**
3. Click **Save changes.**

Selection Process

Selection criteria and selection plan are optional for non-senate searches. However, if utilized, selection criteria should be relevant to the description of the position and stated qualifications. Please read **Selection Process** for more information on the do's and don'ts for selection criteria and evaluation.

Selection Criteria—

1. Click **Add**.
2. Type the following example:
   Experience in an academic research environment, experience with protein directed evolution, and ability to make positive contributions to lab's climate.
3. Click **Save changes.**

Selection Plan—

1. Click **Add**.
2. Type the following example:
   The PI will evaluate the candidate pool after the final date for applications and conduct interviews, assessing applicants according to the selection criteria.
3. Click **Save changes.**

Specializations—

1. Click **Add**
2. Type in your own specializations.
3. Click **Save changes**.

Committee

Use this section to choose who can log in and review the applications. Please read **Search Committee Membership and Roles**

For this exercise we will not be using a Search Committee but will instead rely on a Principle Investigator to conduct the search for a "Specialist" in Chemistry.

1. Move to the **Core Committee** section.
2. Click **Add**..
3. Choose **Committee chair** from the menu.
4. Click your mouse in the box, **Search by name, email, or CalNet ID**.
5. For this exercise, enter **your own berkeley.edu email address.**
6. Click **Add**.

When adding search committee members to other Non-Senate searches such as a

Lecture Pool, only core committee members should be under committee roles. Everyone else should be under *Additional Access*.

Documentation

Use this section for any Search Plan documents that are necessary for review of the position or search plan, for example, an Organizational Chart or an Academic Coordinator Questionnaire. The other headers in the Documentation section are to be used in the Search Report.

Search Plan Documents—

1. Click **Upload**.
2. For this exercise, **Choose File** any PDF file on your computer.
3. Click **Upload file**.

Disposition Reasons

This section displays the system's default disposition reasons, with one list for individuals who do not meet the basic qualifications to be considered an applicant and a second list for all applicants. Up to 5 custom reasons may be added here based on your department's unique business practices, but they must be added as part of the Search Plan and approved prior to launching the search.

Please refer to the **Disposition Reasons** section of the search guide for more information.

1. For this exercise, click **Add custom disposition reasons.**
2. Choose **Add custom reason**.
3. Type the following: *Insufficient/irrelevant lab experience*.
4. Click **Add.**
5. Click **Save Changes.**

Submit the Plan for Approvals

The search plan must be submitted and approved prior to publishing. The system identifies an approval workflow and "fills in" the steps for that workflow. You may configure the workflow (somewhat). Please refer to the **Submit plan for approval** section of the help documentation in AP Recruit for examples.

1. Return to the Details section of "**Test Non-Senate Recruitment – Chemistry - your last name"**.
2. Double check each section, clicking on the **edit** buttons.
3. Revisit each of the sections on the **Search Info** tab and verify your entries.

4. On the Details section, in the yellow box at the top, click **submit it for approval**.
5. On the confirmation screen, click **Yes, submit for approval**.
6. On the approval screen, click **Download plan**. This is what your approvers will be reviewing. Close the PDF after looking it over.
7. Click **Specify person** and add **your own berkeley.edu email address**. Each step must have at least one specified person. For this example add yourself for each role and approve.
8. Click **Add.**
9. Click **Add alternate approver** for the Department Chair (Let's say the Chair is out of town) and add the alternate email address for the approved alternate.
10. Click **Add.**
11. Click the button **Add a comment.**
12. For this exercise, type: **The plan is ready for review.**
13. Click **Add Comment**
14. Click **Done**.

In an actual recruitment, automatic email requests are sent to each approver who is next in line in the workflow.

Subject: UC Berkeley AP Recruit: Approval Request [recruitment name/JPF#]

Approver's emails include a direct link to the approval screen where they may download the plan, comment, and approve.

Publish the Recruitment

- **The Office for Faculty Equity & Welfare (OFEW) is the final approver; however, the hiring unit recruit analyst is responsible for officially "publishing" the recruitment upon approval.**

- Once published, the recruitment becomes available to applicants to apply and to the search committee for review. Please remember that OFEW automatically places the advertisement on AP Recruit, the Chronicle of Higher Education, HERC, HigherEd Jobs, and America's Job Exchange associate sites. All additional locations are up to the hiring unit to coordinate and place. Job Elephant services are available at no cost to help with advertising (See the Search Guide for information on working with Job Elephant).

- The PDF of the plan is now an historical record of what was approved.

Congratulations! You've created a recruitment, prepared the search plan, and submitted it for approval. In the following exercises you will work with a recruitment that has applicants. You will also create a final Search Report.

PART II

Lesson 3: Working with the Applicant List

Prior to beginning this lesson, please read the **Applicant Evaluation** section of the search guide and the **Reviewing Applicants** section of the help documentation.

1. From the **Recruitments** page, locate the **JPF# you received from OFEW**. If you do not have a JPF# for a specific recruitment to work on, contact **ofew@berkeley.edu**.
2. Click the **Applicants** link. Note the number of applicants is in parenthesis.

Filtering the Applicant List—

Filters can be particularly useful when your applicant list is long.

Experiment now with the workspace ribbon at the top of your workspace to fine-tune your list of applicants. Click **Edit workspace** to adjust your filters and columns.

Change the Columns—

Adjust columns to present more information at a glance about the applicants.

1. Within the workspace editor, click the Columns tab.
2. Be sure Status is in the list of Shown columns. We'll want this column to show up.
3. For this exercise, drag ***Flags*** and ***Disposition Reasons*** from the Hidden section to the Shown section.
4. Click **Save Changes**.
5. To restore the applicant list to the default state, click **Your workspace** on the left side of the workspace ribbon and select **Default workspace** from the drop down.

Other Features—

Be aware of the following additional features. Working with them *won't be necessary for this tutorial.*

- **Download This Data:** Download the applicant list and open it in Excel.
- **Hide applicant:** Useful if an applicant has applied to the wrong position or applied twice. Check the box on the left side of an applicant's name and then select Hide at the top of the workspace. Do not over use this tool.
- **Mark as read:** Check off which applicants you have reviewed. Each committee member also has this feature available to them on their own dashboard.
- **Personal notes:** Jot a personal note about an applicant.
- **Add Applicant:** Manually add an applicant.
- **Send Bulk Email:** Compose one message to send to multiple applicants.
- **Applicant log:** Record of time-stamped activity taken on the applicant.
- **Progress dots:** Roll over an applicant's colored dots for an at-a-glance look at the application's progress.

Lesson 4: Managing Applicants

Prior to beginning this lesson, please review the help section **Meets Basic Qualifications** and the search guide section **Guidelines for Review of Lecturer pools**.

Now you will review a particular application. As you work through the next exercise, keep in mind that the applicant review screen contains the same functionality for the search committee reviewers.

1. Make sure you are on the Entire pool view. In the workspace ribbon, click the Basic qualifications button and select the blue tab, **Entire pool**. Click update.
2. Locate **Margaret Mead** in the list.
3. Click directly on her name.
4. There are 3 different methods to viewing Dr. Mead's documents:
    a. Click the button **Download PDF Bundle**. This downloads a single PDF file with all the application documents for an individual.
    b. Click on **Download** (blue link next to a specific document name) to download a single document. This downloads the file to your computer.
    c. At the top of the Documents section, click the **Viewer** button. The document viewer tool may be affected by browser versions and third party PDF readers.
5. Click **Return to List of Applicants** when you are done reviewing.

Meets Basic Qualifications

An important task is to mark each *completed* applicant as meets basic qualifications or does not meet basic qualifications. *Incomplete* applications should not be examined. Only Analysts can view incomplete applications.

Analysts, Chairs, and Editors all have the functionality to mark 'meets basic qualifications,' but typically analysts make this assessment before search committee chairs and reviewers begin reviewing applications. This way reviewers only have to consider individuals who are officially applicants. Please note that Chairs and Editors cannot view incomplete or late applications. To allow for Chairs and Editors to view "late" applicants, please review the guide for information on setting additional review dates to make these applicants part of the current review period.

Please refer to what was stated in your advertisement to assess applicants. This should be done throughout the application period to avoid having to assess the entire pool at once when the deadline has passed. Tip: Some units review their pools at least weekly to determine if applicants meet the basic qualifications or not. The Office of Federal Contractor Compliance Programs (OFCCP), Department of Labor requires the assessment of basic qualifications for all academic positions. These requirements must be met at the time of application and are necessary for consideration as an applicant for the position.

What this means: Marking applicants as meets basic qualifications ensures that their diversity data will be included in the Diversity report and is in compliance with the Department of Labor, Office of Federal Contract Compliance Programs.

Meets basic qualifications:

1. Check the Basic qualifications section of the workspace ribbon to confirm you are viewing the **Entire pool**.
2. Locate ***Winston Burke***.
3. Look in the Status column and notice he is *Complete*.
4. In an actual recruitment you would click on his name, review his Documents, and determine if he meets the basic qualifications or not.
5. On the left side of the workspace, check the box in Winston Burk's row and then click Meets at the top of the applicant list under **Basic Qualifications.**
6. Click on the Basic qualifications section of the workspace ribbon and select qualified, then click update. Verify Winston Burke has been added to the list of qualified applicants.

What the reviewers see: Reviewers see only the completed applicants' applications. They'll see the Qualified, Unqualified, or Unknown distinctions; however, reviewers cannot mark or move them between the categories.

Does not meet basic qualifications:

1. Use the workspace ribbon to navigate back to view the Entire pool.
2. Locate any applicant with the status, **Complete** (besides Margaret and Winston).
3. *For purposes of this exercise imagine that something in an applicant's CV indicated they do not meet the basic qualifications previously determined and advertised.*
4. Check the box on the left side of the applicant's row and click **Does Not Meet** at the top of the applicant list under Basic qualifications.
5. From the workspace ribbon, change your view to **Unqualified** applicants and verify that this person has been added to the list of unqualified applicants.

Comments

1. Navigate back to view the Entire pool.
2. Locate ***Margaret Mead*** and click directly on her name.
3. In the comment box, type: **Candidate has an article in Science Magazine** and click the **Add Comment** button.

The search committee reviewers are able to read one another's comments just as they would share comments around a conference table.

Flags

1. In the flag box, type: **Organic chemistry** and click the **Add Flag** button.

The search committee reviewers may read one another's flags when **Display to Reviewers** remains checked. These are a way to divide the applicant pool by desired characteristics, or to rate candidates.

Comments and flags should be written as considerately as words spoken in face-to-face meetings. Please monitor your search committee's comments and flags. Remember, these are part of the electronic record.

Documents

Managing an Applicant's Documents

Only Analysts, Editors, and Chairs may manage applicant's documents.
Let's say an applicant needs to send in materials by regular U.S. mail and now the documents must be uploaded into Recruit. This would require that you scan in the documents beforehand and save them as PDFs.

1. Return to the list of applicants.
2. Locate any applicant with the status, **Not Completed**.
3. Click directly on the applicant's name.
4. Under the Documents section, next to Curriculum Vitae, click **Add**.
5. Click **Choose File** and upload any sample PDF file on your computer.
6. Click **Add**.
7. Click **Return to List of Applicants**.

Note: The applicant's log will record this action. If this was the last requirement needed, the status of the application will automatically change to *Complete*.

Update Applicant Statuses

It's time to short-list applicants. In an actual recruitment you should work with your Chair to update the applicants' statuses. It is important to keep statuses up-to-date throughout the recruitment period. You should not simply determine which applicants meet basic qualifications and leave the pool further unassessed until a candidate is proposed for hire. For instance, you will update statuses when a list of candidates under serious consideration is selected (long short list), when candidates are recommended for interview (short list), once applicants have been interviewed, if they withdrew at any point, and when a final proposed candidate is being put forward.

Keeping the applicant's status up-to-date will make sure that the search committee is always aware of the current status, and is also required for UCOP and diversity office reporting.

Prior to beginning this section, read **Applicant Evaluation** in the search guide and the **AP Recruit Help section**, "Statuses and Shortlisting."

1. Notice that applicant statuses are visible in the status column.
2. Find ***Winston Burke***.
3. Notice that the current status is *Complete*. Click directly on his status to update it.
4. Read through the descriptions of the various statuses. Anyone beyond "Serious Consideration" will be considered shortlisted.
5. Choose **Serious Consideration**.
6. Click **Update Status**.
7. Click his status again.
8. Click **Recommend for interview.**
9. Click **Update status**.

Note: Recruit keeps a running history of the applicant's status changes on the log.

Now imagine your PI from the Chemistry Specialist search has selected a candidate. Try updating the applicant's status to **Proposed Candidate**. Please review "**Applicant status updates for Search Reports**." For the purposes of this example you will make two status updates to get to Proposed Candidate. In an actual search this will not happen all at once.

1. Notice that applicant statuses are visible in the status column.
2. Find applicant, ***Margaret Mead***.

3. Notice that Dr. Mead's current status is *Recommend for Interview*. Click her status to update it.
4. Read through the descriptions of the various statuses. Anyone beyond "Serious Consideration" will be considered shortlisted.
5. Choose **Interviewed.**
6. Click **Update Status**.
7. Click her status again.
8. Choose **Proposed Candidate**.
9. Click **+ Add Offer Information**. This information will be a vital part of the final Search Report.
10. For percentage of time, type **100%**.
11. Finish the rest of the offer proposal form and click **Update status**.

Note: Recruit keeps a running history of the applicant's status changes on the log.

Please make sure to carefully update candidate statuses without skipping any steps. Should you incorrectly assign a status, contact OFEW directly (**ofew@berkeley.edu**) to reset their status to "complete" for you to update again.

Assign Disposition Reasons

Assign reasons why applicants did not move forward in the hiring process. Applicant disposition reasons are an important component to the final Search Report.

When you initially determine that a candidate "Does Not Meet Basic Qualifications," you can assign a disposition reason right away. After each stage of deselection, applicants should have disposition reasons assigned. However, be sure that you do not wish to consider that applicant any further. Assigning disposition reasons as your PI or search committee deselect candidates will help you when completing the final search report.

One or more "dispositions," or reasons for deselection of a candidate, are assigned to individuals who submitted an application for the position. One set of reasons are used for individuals deemed "unqualified" because they did not meet the basic requirements for the position as stated in the advertisement, did not provide a complete application, did not have the required letters of reference submitted on their behalf, or withdrew prior to being invited for an interview. Another set of disposition codes are used to assign a disposition reason for all applicants who met the basic qualifications.

Qualified applicants' disposition reasons:

1. In the Basic qualifications section of the ribbon, click the green tab **Qualified** then click **Update.**
2. On the top green header click **Assign Reasons** in the middle right.
3. Select any applicant in the list and click your cursor in the disposition reasons box.
4. Choose this reason from the drop-down menu: *Lacks sufficient research achievement/potential.*
5. Optionally leave a comment.
6. Click the ***Done*** button to leave the dispositions screen.

Unqualified applicants' disposition reasons:

1. Use the ribbon to view the **Unqualified** candidates.
2. Click **Assign Reasons** at the top of the list of applicants.
3. Find the applicant that you marked as **Does Not Meet Basic Qualifications** in the list and place your cursor in the box.
4. Choose this reason from the drop-down menu: **Did not meet stated basic research requirements.**
5. Optionally leave a comment.
6. Click the **Done** button to leave the dispositions screen.

Please remember that the position this fake recruitment is hiring for is a "Specialist." For each lecturer pool Search Report specific information needs to be clear for every applicant. Please note that once your department is certain that specific candidates will not be moving forward in the selection process you should inform the applicants. Please reference our **Rejection Email Templates for Deselected Candidates**.

Lesson 5: The Search Report

Prior to beginning this lesson, read "**Completing the Search Report**" and the **AP Recruit Help section**, "Search Reports."

Verify Statuses and Disposition Reasons

Verify that the statuses of all individuals who submitted an application are correct and up-to date:

1. Click on the **Search Info tab**
2. Click on **Disposition Reasons**
3. There you will see a panel that highlights those applicants missing disposition reasons. Next to "Meets basic qualifications" click on the blue text highlighting

how many applicants are missing reasons.

4. Assign reasons to all applicants by selecting from the dropdown. For the purposes of this exercise you may assign any reason(s) for the candidates.

To assign bulk reasons, check the box next to specific candidates' names on the left-hand side.

1. Click "Edit disposition reasons for selected applicants."
2. Check the box for "Lacks sufficient clinical experience and "References were weak."
3. Click **Apply**.

To assign bulk comments, check the box next to specific candidates' names on the left-hand side.

1. Click the dropdown in the upper right-hand corner of your screen, "Edit comments for selected applicants."
2. Under New comment, write "Job talk showed deficiencies."
3. Click **Append**.

See above examples from "**Update Applicant Statuses**."

In an actual recruitment you would update the applicants' statuses along the way.

On the Applicants screen, use the riboon to set your view to **Entire pool**. Click edit workspace and within the Filters tab, uncheck **Not complete**, **Complete, and Withdrawn**.

1. Click **Save changes**
2. Find applicant, **Winston Burke**
3. Notice that Dr. Burke's current status is *Recommend for Interview*.
4. Click his status and update it to **Interviewed**
5. Click **Update status.**

Finish assigning candidate disposition reasons

See above example from "**Assign Disposition Reasons.**"

Provide Comments for Interviewed Applicants and Proposed Candidate(s)

Applicants who were on the short list (interviewed) require comments in addition to the disposition reason. It is important that the statements reflect the strengths/weaknesses of the individual applicants, and compare their qualifications to the established search criteria set forth at the beginning of the search. A statement is also needed for the Selected Candidate (do not select a Disposition Reason).

Interviewed candidates:

1. Go to the Applicants tab and change your view to **Qualified** applicants**.**
2. On the top green header look for **Assign Reasons** in the middle right.
3. Click **Assign Reasons.**
4. Look for **Winston Burke.**
5. Click in the **Disposition Reason(s)** box and start typing *Lacks sufficient depth/breadth of research/creative excellence or impact*.
6. Click in the **Comment** box and type "Interview demonstrated lack of depth in current research."
7. Return to the applicants page.
8. Check your columns to make sure you can view **Disposition Comments** on your screen.

Proposed candidates:

1. Go to the Applicants tab and change your view to **Qualified** applicants**.**
2. On the top green header look for **Assign Reasons** in the middle right.
3. Click **Assign Reasons.**
4. Look for **Margaret Mead.**
5. ***Do not select a disposition reason as she is the proposed candidate.*** Rather type the following into her comment box: "*This is the proposed candidate.*" For an actual Search Report a few sentences would be needed about why she is the Proposed Candidate.
6. Return to the applicants page.

Upload Documentation Related to the Search

All letters/memos/written recommendations regarding the search should be uploaded into the Search Report. At a minimum there should be a report from the search committee (the "**Search Committee Narrative**,") for all non-senate positions except lecturer, postdoctoral fellow, continuing educator, specialist, and project scientist recruitments. It is required that all **interview materials** (See "Documentation") regarding the search are uploaded in this section. They will be archived with the search and are not necessary to also save at the department or school level.

Interview materials include:
Please read "**Documentation**" for a complete list.

- Questions used for interviews
- Evaluation tools used (e.g., rating forms), including the completed forms from search committee members
- Notes taken during interviews by search committee members
- Notes taken from reference checks

1. Under the **Search Info** tab, select **Documentation.**
2. Next to **Letters and Memos** click **Upload** and **Choose File** any PDF file on your computer.
3. Click **Upload file.**
4. Next to **Interview Materials** click **Upload** and choose any PDF file.
5. Click **Upload file.**

Advertisements

Optional: State what was actually done under the Actual search & recruitment efforts section. Upload evidence of all locations where the advertisement was posted to the Evidence of Advertisement section.

Review Search Report

Revisit each tab under Search Info and make sure all blue box **Search Report** areas are complete. As you will notice, the **Search Plan** boxes are now gray when they were initially blue. The blue coloring indicates when an action is needed.

Generate the Search Report

1. Click on the Reports tab.
2. Click on the left hand **Search Report** tab.
3. Click **Preview** to review in PDF format
4. Click **Create New Search Report**.
5. Name the report, **Search Report-Margaret Mead**. In the report name always include the name of the proposed candidate(s)
6. You will be returned to the reports page.
7. Find your Search Report and click on the name to **Download**. Close the PDF when done.

Submit the Report for Approvals

The approvals process should look familiar to you by now!

1. Click **Submit now** beneath Approval.
2. On the confirmation screen, click **Yes, submit for approval**.
3. You may add a step to the workflow or assign alternate approvers. Every step

must have at least one specified person.

4. Click **Done.**

Remember, in an actual recruitment, automatic emails are sent to approvers who are next in line to approve.

Lesson 7: When the Search is Complete

Update the status for the hired applicant(s) once they are on campus. This can sometimes be long after the search report is approved. It is critical to remember to complete this step when the candidate is hired (or an offer is not made, or an offer is declined):

1. Return to the applicant list and locate **Margaret Mead**.
2. Click her status to update it.
3. Choose **Offered.**
4. Enter the Offer Information.
5. Click **Update status.**
6. Click her status again and select **Accepted offer**, Update status.
7. Click her status again and select **Hired**.
8. Click **Update status.**

Conclude the Recruitment

The search is complete when a candidate has been hired, or if no individual ends up being hired. At this point, Analysts must conclude the recruitment. This indicates the final outcome of the search and effectively removes the entire recruitment plus the applicants and files from all reviewers. Don't worry, as Analysts, you can always reopen the recruitment.

1. Click **Conclusion** on the left side of the screen within your recruitment.
2. Next to Search outcome, click **Edit**. Select **Candidates hired** and save the changes.
3. At the bottom of the screen click **Conclude recruitment**

Congratulations!

Contact **ofew@berkeley.edu** and your Recruit account will be updated.