

# Academic Recruitment E-learning Tutorial

## *for Senate Faculty 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 senate academic recruitments.

Your role in 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 search committee understands all required policies and procedures for conducting searches, as specified in the Senate Search Guide;
- **Running the search:** Support with placing advertisements and conducting outreach, initial review of candidate basic qualifications, submission of the Applicant Pool, instructing committee members as needed on how to review candidates and leave comments, maintaining up-to-date AP Recruit statuses for all candidates, submission of the Short List, 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 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](mailto: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. See the table of contents for the online version of the [Search Guide for Senate Faculty Recruitments](#).

You will need to refer to this guide throughout the tutorial. Please note there is a similar online guide for Non-Senate Academic recruitments. If you will be supporting both types of recruitments, it is important to understand that there are less requirements for running Non-Senate searches. You may want to review the [Search Guide for Non-Senate Academic Recruitments](#) before running a Non-Senate search.

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.

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## PART I

### Lesson 1: Setting Up a Recruitment

Prior to beginning this lesson, please read [Summary of Overall Requirements and Timelines for Senate Faculty Recruitment](#). Assume that the department/unit/school/college has been given permission to recruit for a faculty position. Also have open the [Senate Search Plans Checklist](#) as a reference for completing the steps to a successful search plan.

For an overview of the Academic Recruitment Process for Senate Faculty Searches, please see the [Senate Flowchart](#). For detailed information about search committee processes and considerations, download and read "[Guidelines for Creating an Effective Faculty Search Process Departmental Policy](#)."

#### CREATE A RECRUITMENT PLAN

1. Please read "[Overview for Creating the Search Plan](#)," and "[Creating the Search Plan: Basic Information about the Recruitment](#)."
2. In the test site, move to the **Recruitments** page by clicking "UC Berkeley Faculty & Administrators" then 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, "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 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 —

- Area approved by the EVCP for the faculty FTE.

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 —

- The approved number provided to the department by the EVCP (or “FTE number” or “salary authorization number”).

6. Fill in the Application Submission Dates section.

The “open/close/final” option is used in all senate faculty recruitments, rather than open until filled or pools that remain open for at least one year (the Initial Review Date/open until filled option)

For this exercise, click **Open/Close/Final**.

*Open Date* —

- For this exercise **select today’s date**. This is the date you want applicants to begin to apply. This date should match the advertisement. 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.

*Close Date* —

- For this exercise **select two months from today**. This is the date when you will no longer accept applications. This date should match the advertisement. Senate recruitments must be open for at least 30 days.

*Final Date* —

- For this exercise **select one week past the Close Date**. This is an optional date for existing applicants to finish their applications (a grace period).

7. Fill in the Search Information section

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

8. Fill in the Optional Information section.

- For this exercise, type your department’s home page URL.

Click the **Next** button.

Fill in the Title Codes & Specialties.

Title Codes—

- Start typing a title code in the box or enter part of a title's name, for example, "Ast. Prof". The system will provide a menu.

- *For this exercise, type 1200.*

- 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 used.

Availability Data—

- Put your cursor in the "fields of study" box and select from the menu.
- For this exercise, **choose Chemistry, other.**
- Put your cursor in the box and add another specialty or two that you are familiar with.
- Click the **Next** button when you are done.

9. Verify the Recruitment's Contact information:

- Verify and edit (if necessary), your name and email address.
- Verify and edit (if necessary), your department mailing address.
- 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 the "[Applicant Qualifications.](#)"

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 as an afterthought.

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**.
- Click **Add**.

Reorder—

- Click the **Reorder** button.
- Using your mouse, click the icon beside **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). Letters are typically required at the time of application for assistant professor positions, while requirements for tenured positions are usually “**Only contact information**.”

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. 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 address (URL). This is an important link so be sure to use 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 **Women**.
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 senate search guide and see the [Checklists and Templates webpage](#) for advertisement requirements and templates.

### Planned Search & Recruitment Efforts —

1. Click **Add**.
2. For this exercise, type: **Post the advertisement to the American Chemical Society and send personal emails to colleagues letting them know about the position. Ask colleagues for recommendations of women and underrepresented minorities. Please see our [Outreach Email Templates](#) for suggested language.** Please note that the expectations for outreach for senate recruitments are multiple sources of advertisement, and multiple sources of personal, additional outreach.
3. Click **Save changes**.

### Actual Search & Recruitment Efforts —

*Provide this information once the search has been published, prior to submitting the Applicant Pool 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 file**.

### HERC Categories —

Select which category and area of expertise best fits the recruitment from the list of choices.

1. Click **Add**.
2. For this exercise, choose: **Physical Sciences**.
3. Click **Save changes**.

## Ad Sources —

List the various places where your recruitment will be advertised.

1. Click **Add**.
2. For this exercise, type **American Chemical Society**.
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.

1. For this exercise, remember we are using a "Chemistry Asst. Professor" (decided above with title code **1200**) as our example:

## Basic—

1. Click **Add**.
2. Type **A Ph.D. or equivalent degree in Chemistry or a related field is required to be considered an applicant for the position.**
3. Click **Save changes**

## Additional—

1. Click **Add**.
2. Type **Demonstrated excellence in research in inorganic theoretical chemistry.**
3. Click **Save changes**.

## Preferred—

Many faculty recruitments do not list preferred qualifications. You may skip this step for this exercise.

Selection Process

Use this section to document the committee's plan for a screening process, interview procedures, etc. This information can often be found within the position's description. Please read "[Selection Process](#)" and "[Guidelines for Creating an Effective Faculty](#)"

[search Process Departmental Policy](#)” 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:  
**Evidence of outstanding research and the potential for scholarly activity and teaching.**  
*Please see Appendix E for a Sample Candidate evaluation form.*
3. Click **Save changes**.

#### Selection Plan—

1. Click **Add**.
2. Type the following: **This is where the detailed evaluation and selection process would be written.**
3. Click **Save changes**.

#### Specializations—

1. Click **Add**.
2. Type the following: **Organic Chemistry.**
3. Click **Add**
4. **Save changes.**

#### Committee

Use this section to choose who can log in and review the applications. Please read [“Search Committee Membership and Roles.”](#)

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, 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. The other headers in the Documentation section are to be used in the Search Report.

### 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 "[Disposition Reasons](#)" for information about disposition reasons.

1. For this exercise, click **Add custom disposition reasons**.
2. Choose **Add custom reason**.
3. Type the following: *Research is not in inorganic theoretical Chemistry as required.*
4. Click **Add**.
5. Click **Save Changes**.

### SUBMIT THE PLAN FOR APPROVALS

You will ask for approval of the search plan. The system identifies a workflow and "fills in" the steps for that workflow. You may configure the workflow (somewhat). Please refer to the [AP Recruit Help Section](#), "Submit plan for approval" for more information.

1. Return to the Details section of "**Test 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 submissions.
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 the 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.
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 arrow below next to **Comments**.
12. Click the button **Add a comment**.
13. For this exercise, type: **The plan is ready for review**.
14. Click **Add Comment**
15. 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.

<b>PUBLISH THE RECRUITMENT</b>
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- **The Office for Faculty Equity & Welfare (OFEW) is the final approver. You as the department analyst will officially “publish” the recruitment upon approval confirmation.**
- 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 associated sites. All additional locations are up to the hiring unit to coordinate and place. Job Elephant is available to help with advertising at no cost (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 "[Applicant Evaluation](#)," [Senate 'During the Search' Checklist](#).

1. From the **Recruitments** page, locate the **search you received from OFEW (set up in your name)**. If you do not have a specific recruitment to work on, contact [ofew@berkeley.edu](mailto: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.

#### Change the Columns

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

Please read the [AP Recruit Help Section](#), "Applicant list workspaces."

#### 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. 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

Please read the [AP Recruit Help Section](#) “About Minimum Basic Qualifications”

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 PDF bundle of all an applicant’s documents, including a cover letter, watermarks, and interstitial pages in between each document.
  - 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 *completed* applicants as meeting the basic qualifications or not. *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.

Deciding if applicants meet the basic qualifications must be non-comparative, objective, relevant, and verifiable. 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.

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:** Distinguishing applicants who meet the 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 Burke'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 **Basic Qualifications: Does Not Meet** at the top of the applicant list.
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.

**REVIEW AND SUBMIT THE APPLICANT POOL**

Please read the [AP Recruit Help Section](#), "Statuses and Shortlisting"

For Senate Faculty recruitments it is necessary to produce and submit a report of the demographics of the applicant pool as soon as the final deadline date to apply is reached.



The search committee should evaluate the report, considering the benchmark statistics and the Affirmative Action goals, and decide whether additional outreach efforts are needed, or if the pool is sufficiently broad and diverse. In order to submit an Applicant Pool report for consideration by OFEW it is necessary to fill in the Actual Search & Recruitment efforts, and assess each person who submitted an application as meeting or not meeting the basic qualifications.

1. Go to the **Reports** tab.
2. Click the **Applicant pool** tab and **Create new applicant pool report**.
3. See where it says “Actual Search Efforts must be entered” and click **Add now**.
4. Enter “This is where the actual search and recruitment efforts undertaken to achieve a broad and inclusive applicant pool will go”
5. Review what is auto populated and click **Create Report**.
6. Under **Not Submitted**, find the newly created report and click **Submit as new approval**.
7. Click **Yes, submit for approval**.
8. Leave the auto-populated approvers for now.
9. Click **Done**.

Please note: when filling in the Actual Search & Recruitment Efforts you do not have to restate the efforts you outlined in the original search plan. Rather you should state what is different, and provide information about why it is different.

Evidences of advertisement—

1. Under the **Search Info** tab, click **Advertisements**.
2. Notice **Ad Sources** says “Not yet specified”
3. For the purposes of this tutorial, click **Add** and enter “Chemistry Magazine.” *In a real search this would have been filled out during the Search Plan phase.*
4. Click **Save changes**.
5. Next to **Evidences of advertisement** click Ad source. *If Chemistry Magazine didn’t pop up, refresh your browser window.*
6. **Choose File** any PDF file on your computer.
7. Click **Upload file**.

**For the purposes of this tutorial, please continue without approval of the applicant pool. NOTE: in an actual Senate Search, an approved applicant pool is needed before a shortlist is created.**

Comments

Continue to assess the candidates by following the below steps:

1. Click on the Applicants tab.

2. Navigate back to view the Entire pool.
3. Locate **Margaret Mead** and click directly on her name.
4. 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: **Strong teaching** 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 (e.g., Cover letter, CV, statement of research, statement of teaching, publications). Let's say an applicant needs to send in materials by regular U.S. mail and now the documents must to 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 withdraw 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](#)" 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.

#### REVIEW AND SUBMIT THE SHORT LIST

Prior to beginning this section please read "[Short list](#)," and the [AP Recruit Help Sections](#) "About applicant pool reports" and "About shortlist reports."

1. Go to the **Reports** tab.
2. Click **Shortlist**.
3. Click **+Create New Shortlist Report**.
4. Review what is auto populated and click **Create Report**.
5. Under Not Submitted, find the newly created report and click **Submit as new approval**.
6. Click **Yes, submit for approval**.
7. Leave the auto-populated approvers for now.
8. Click **Done**.

**For the purposes of this tutorial, please continue without approval of the short list. NOTE: in an actual Senate Search, an approved short list is needed before the committee can invite candidates for interviews.**

### UPDATE APPLICANT STATUSES (CONTINUED)

**Please resume updating applicant statuses.** Now imagine that your Search Committee from the Chemistry Senate search you created earlier has selected a candidate. Try updating the applicant's status to **Proposed Candidate**. Please review the "[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**.
12. Click **Done** to return to the applicants screen.

**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](mailto: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 the search

committee deselected candidates will help 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 look for **Assign Reasons** in the middle right.
3. Select any applicant in the list and place your cursor in the 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 that applicant name you wrote down (the one 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.

### **Lesson 5: Completing the Search Report**

Prior to beginning this lesson, read “[Completing the Search Report](#),” the [AP Recruit Help Section](#), “Search Reports,” and the [Senate 'Search Report' Checklist](#).”

#### **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 ribbon to set your view to **Entire pool**. Click edit workspace and within the Filters tab, deselect **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 REGARDING INDIVIDUALS INTERVIEWED AND PROPOSED CANDIDATE**

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). It is possible to state “see search committee narrative for comments” next to names of those interviewed or the proposed candidate, rather than having the comments in two places.

#### 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 at least a few sentences would be needed about why she is the Proposed Candidate (please note: this is typically done in depth in the search committee narrative so a comment can simply refer to the narrative)
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](#)”) and all [interview materials](#) regarding the search 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:

- 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**.

### PROVIDE EVIDENCE OF ADVERTISEMENT

Review the list of advertising locations specified as part of the Search Plan in the “Ad Sources” section (American Chemical Society). Delete any advertisement sources not used as planned and add any additional locations actually used. Provide evidence of advertisement publication and payment in the “Ad Evidences” section. *Please note: If you add additional sources to the list as part of the Search Report, refresh your screen before attempting to upload the evidences.*

This section can also be completed earlier in the process, prior to submitting the applicant pool report for review, to provide evidence that the stated advertising locations were used or stated outreach activities were conducted.

### 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**.
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 re-activate.

1. Return to the Recruitments page by clicking **Recruitments** in the top menu bar.
2. Find "**Test Non-Senate Recruitment – Chemistry - your last name.**"
3. Click on the recruitment and click **Conclusion** on the left side of the screen.
4. Next to Search outcome, click **Edit**. Select **Candidates hired** and save the changes.
5. At the bottom of the screen click **Conclude recruitment**

**Congratulations!**

Contact [ofew@berkeley.edu](mailto:ofew@berkeley.edu) and your Recruit account will be updated.