

Academic Personnel Recruit

USER MANUAL

Produced by UCIrvine's Office of Information Technology — February, 2016

ABOUT RECRUIT

Faculty recruitment has long been a paper-intensive process, creating an unnecessary administrative burden both to increasingly over-assigned staff and faculty committees juggling multiple priorities. In 2011, the University of California selected UCI's AP Recruit system—used on that campus since 2006—for system-wide deployment at all ten UC campuses.

Recruit provides for secure online academic employment recruitment management, supporting the entire recruitment workflow from early approvals, opening recruitments, applications, reference gathering, reviewing by the search committee, and, finally, selecting a hired candidate. Reports are built-in to the system, providing for an easy way to create the reports that the University of California's Office of the President uses to ensure all campuses meet their requirements as equal opportunity employers. Recruit also ensures the security and integrity of all applicant, reference, and related recruitment data.

How To Use This Manual

The purpose of this manual is to document RECRUIT's functionality in order to aid Recruit Administrators and for trainers to help other users of the system. Permission is granted to copy, distribute and/or modify this document for your educational use. Please refer to the UC Recruit Project Website at <http://sites.uci.edu/ucrecruit> for recent product updates that may not be included in this edition of the guide.

- UC Irvine's RECRUIT Development Team

The use of a double asterisk (**) denotes an internal UC San Diego process/function and not a platform-wide use or function.

-UC San Diego Office of Academic Diversity and Equal Opportunity (OADEO)

What You Need to Know Before You Start

Operating Systems & Browsers

Recommended operating systems:

Microsoft Windows 8.1+ or Apple Mac OS X 10+

Other: Recruit's responsive design is compatible with up-to-date mobile devices.

Supported browsers:

Automatic updates are always recommended to ensure a secure and modern browsing experience, as certain technologies may lead to a degraded or otherwise suboptimal browsing experience. Each of the latest browsers are supported along with backwards compatibility for one full version still supported by the vendor:

Google Chrome

Mozilla Firefox

Apple - Safari

Internet Explorer

How to Log Into Recruit

To access Recruit you must have a UC San Diego Single Sign-On (SSO), UCSD's authentication system for the campus community. The SSO is automatically generated for all faculty and staff when they enter the payroll system, however it must be activated.

Log into to Recruit here — <https://apol-recruit.ucsd.edu/>

A link to Recruit is also available on UC San Diego's Academic Personnel homepage — <http://academicaffairs.ucsd.edu/aps/adeo/recruitment/quick-links.html>

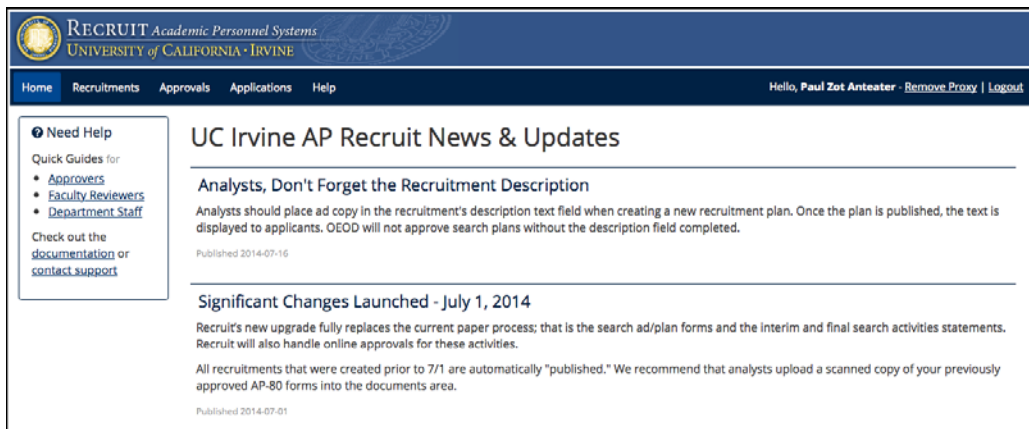
All trainees will use Recruit's training site at—<https://apol-recruit.ucsd.edu/training>

1. Click on “UC San Diego Faculty & Administrators.”
2. When prompted, authenticate with your UC San Diego SSO and password.



The News & Updates Page

The Home page with news and updates is the same for all faculty and administrator roles.



All users know they are logged into Recruit by looking to the right on the menu bar. This is also how users log out of the system:

Hello, Paul Zot Anteater | [Logout](#)

The top menu choices will differ depending on the user's role in Recruit. If you only see News & Updates, you have not been assigned any role and should contact acthelp@ucsd.edu for help.

Home Recruitments Approvals Help

User Roles in Recruit

Recruit Administrators and User Managers are the primary supporters for end-users and they will manage most role assignments. *Committee chairs, editors, reviewers, and approvers* are assigned their roles on a recruitment-by-recruitment basis by the *department analyst* who is in charge of administering the recruitment.

The role you are assigned in Recruit determines the tasks you can perform.

Department Analysts administer all aspects of the recruitment from start to finish. They create the recruitments for their departments, complete the search plan, publish the recruitment, assign search committee roles, manage the applicant files and generate reports.

Add'l Staff Editors can assist the Department Analyst in dispositioning applicants from the Unknown Pool to the Qualified and Unqualified pools. This position is not able to view or create reports.

Dean's Analysts have the same access rights as the Department Analyst but on the School level.

Committee Chairs primarily review and manage the applicants. Chairs are able to mark applicants as "qualified" or "unqualified", send bulk email to applicants, update applicant statuses, etc. Chairs also may add/edit portions of a recruitment's information — information that is part of the Search Plan and/or Search Report. They are unable to see incomplete applications.

Search Committee Reviewers primarily review and manage the applicants. They have viewing rights to completed applications and may comment or flag applicants. They have viewing rights to a recruitment's information, but unlike chairs or editors, reviewers have only *read* access rights.

Equity Advisors This role is often part of the approval workflow for the search plan and reports. They have viewing rights to view completed applications for a given recruitment and can view and create diversity reports. In addition, they can download all-encompassing applicant diversity data.

Diversity Analysts This role is often part of the approval workflow for the search plan and reports. They have viewing rights to view completed applications for a given recruitment and can view and create diversity reports. In addition, they can download all-encompassing applicant diversity data.

Approvers are the newest roles in Recruit and are responsible for overseeing the Search Plan, Diversity Reports, and the final Search Report. Approvers are either system-assigned or assigned by analysts on a recruitment-by-recruitment basis. Listed below are the Approver titles that may be chosen for a workflow:

Committee Chair, Faculty Principal Investigator, Affirmative Action Reviewer, Department Chair, Department Director, Equity Advisor, Dean's Analyst, Dean, University Librarian, Diversity Office, Central AP Office, Academic Senate, Budget Office, Vice Provost, Provost, Executive Vice Chancellor, Chancellor.

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Part 1: Recruitment Management

Create the Basic Recruitment

The analyst begins by creating the *Basic* recruitment — inputting the position name, application submission dates, title codes, specialties, etc. This simultaneously builds the survey on diversity, an important component of Recruit.

****All tenured and non-tenured positions must have separate search profiles on APOL-Recruit****

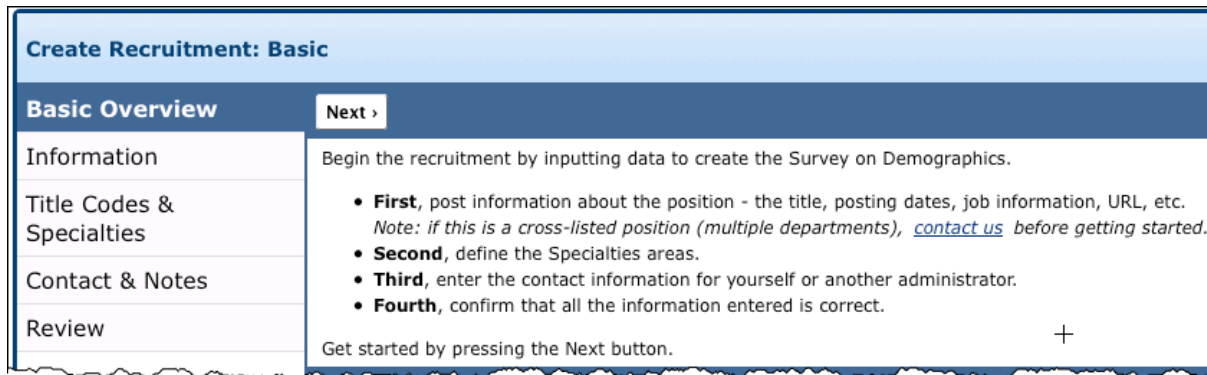
- 1.
2. Click **Recruitments** in the top menu bar.



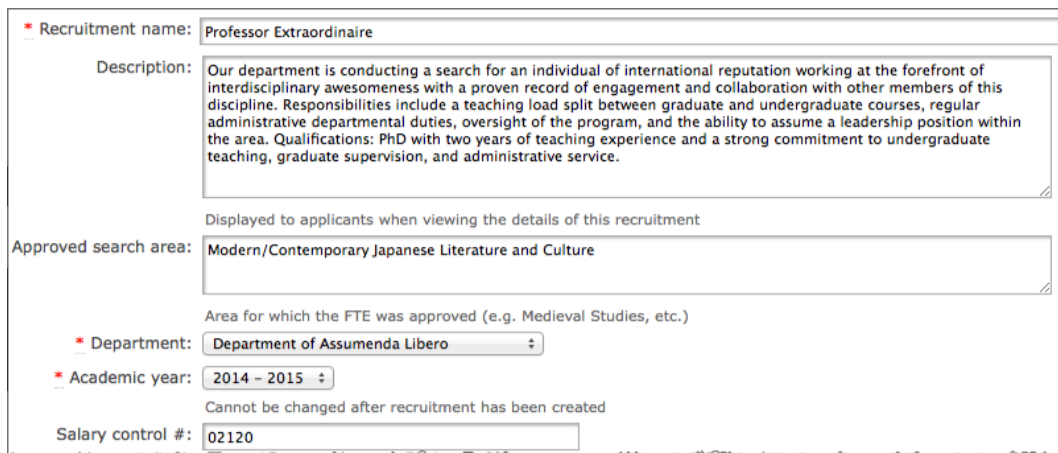
3. Click the button, **Create New Recruitment Plan**.



4. Read the Basic Overview page and then click the **Next** button.



5. Fill in the basic information about the recruitment:


A screenshot of a recruitment form. Fields include: 'Recruitment name' (Professor Extraordinaire), 'Description' (a paragraph about interdisciplinary research), 'Approved search area' (Modern/Contemporary Japanese Literature and Culture), 'Department' (Department of Assumenda Libero), 'Academic year' (2014 - 2015), and 'Salary control #' (02120). There are red asterisks next to the name, department, and academic year fields.

- **Recruitment name:** The recruitment name should match the ad.
- **Description:** The description appears to applicants on the corresponding apply page. Insert the full ad text. Include the Equal Opportunity/Affirmative Action Employer tag line (EEO). Include the URL for Applicants that the system will auto-assign. This description text will also be used when the recruitment is posted to HERC.org and InsideHigherEd.com. The

Description field locks after the search plan is approved, keeping the analyst from changing the public face of the recruitment while still allowing Recruit Administrators to make updates if needed.

- **Approved search area:** Optional, editable field to document the area in which the FTE will be approved. (e.g. Medieval Studies)
- **Department:** Select your department from the drop-down menu. If this is a cross-listed position (multiple departments or schools), finish creating the recruitment and edit the department field afterward.
- **Salary control#, Salary range, Rank/Step, and Job location:** These optional fields will help with tracking.
- **Search Information**
 - Choose whether this position advertised broadly or specifically targeted.
 - Choose whether this recruitment is newly allocated or if it is being re-listed from a previous academic year. This is for UCOP and the need to analyze applicant diversity data.

Search Information

Search breadth:  *Click the Tool Tip for explanation*

Is this an open/general search or a targeted/specialized search?

Initial search allocation:

Is this position newly allocated or is it being re-listed from a previous academic year?

- **Optional Information Link:** Provide the URL if this recruitment is advertised on your school or department jobs website and Recruit will display the link to applicants when they apply.

Optional Information Link

Information URL:

Optional - check with your webmaster if you are unsure what you should put here

Open/Closed/Final Recruitments vs. Pool Recruitments

There are two distinct types of recruitments: Open/ Closed/Final and Initial Review Dates/Open Until Filled (IRD).

Application Submission Dates

Set up recruitment as: Open/Close/Final Initial Review Date/Open Until Filled

Open/Close/Final Recruitments —Choose this for one-time searches that will complete when the vacant spot is successfully filled.

Open/Close/Final ←

* Open date: 
 Applicants cannot apply until this date.

* Close date: 
 Applicants cannot apply after this date.


* Final date: 
 The recruitment will no longer be available to applicants after this date.


Key features of Open/Closed/Final:


- The Open date is when applicants can begin applying. Open dates remain editable by the analyst at any time. All recruitments must be open for at least 30 days.
- The Close date is when new applicants are no longer accepted. The Close date will be locked once the Search Plan is approved in order to help ensure that the close date remains true to the advertisement(s).
- The Final date is the deadline allowing existing applicants to modify their files. This date must be greater or equal to the Close date. Final dates remain editable by the analyst at any time.
- All completed applications are viewable to the search committee, regardless of Close or Final dates.

IRD/ Open Until Filled — Choose this for searches in which pools of applicants are gathered and evaluated separately at different times. Choose if you think a candidate might be chosen before the recruitment closes. Choose for “pool” recruitments when there will be multiple people hired. Recruit informs applicants that in order to receive full consideration by the committee, they must complete by a specific review date.

Initial Review Date/Open Until Filled

* Open date: 
 Applicants cannot apply until this date.

* Initial review date: 
 Applicants must complete their applications by this date to be considered.

* Final date: 
 The recruitment will no longer be available to applicants after this date.

Key features of Initial Review Dates/Open Until Filled:

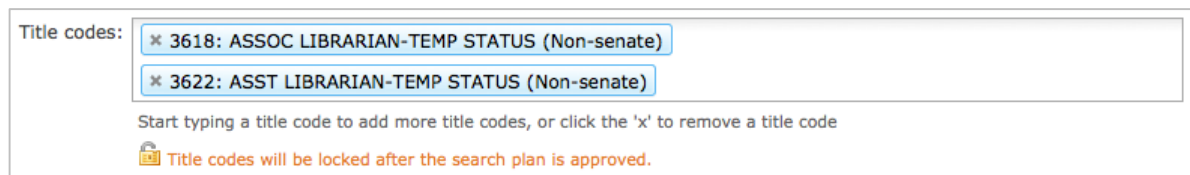
- The first Initial Review Date marks the closing of the first pool of applicants. *Once the recruitment is approved, the IRD cannot be changed—this is designed to keep the advertisement and submission dates in sync.*
- Committee Reviewers will see the completed applications within a review period.
- The applicant can't modify applications that are completed before a review date once that date has passed.
- Committee Reviewers can choose not to view applicants from previous pools (previous review periods).
- After the current review date has passed the analyst may create additional review dates in order to capture a separate pool of applicants.
- Review dates can be marked private, and thus won't appear to applicants.
- The last date when applicants can apply is the Final date. If the analyst creates an additional review date that is after the Final date, the Final date will automatically be moved to accommodate it.
- Applicants may apply before the Final date, even if there is no upcoming review date. In this case, they will be informed that their application may or may not be considered.

Title Codes and Specialties

Title Codes: Academic Title Codes map directly to salary scales and the codes that are input into this field must reflect the wording in all advertisements for the recruitment.


After the Search Plan is approved, the title codes are no longer editable. This helps to ensure the scale is not retroactively changed to suit a particular candidate. To cue you, lock icons appear in the field along with a tool tip when the icon is rolled over. In the case of clerical error only, a Recruit Administrator may override the lock.

Type a title code in the box. Or, type part of the name, for example, “Prof.” The system will provide a menu of title codes to select. There is no limit on the number of title codes. Click the ‘x’ to remove a title code.



Title codes:

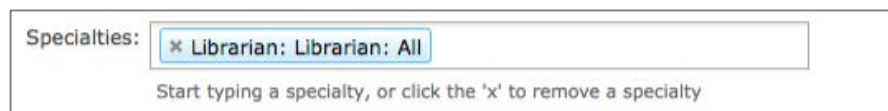
Start typing a title code to add more title codes, or click the 'x' to remove a title code

 Title codes will be locked after the search plan is approved.

Hiring Type: This section is automatically filled in for you, based on the Title Code(s) chosen.

Specialties: The specialties in Recruit are intended to provide search committees a realistic picture of the national availability of potential candidates.

Start typing a specialty into the box and Recruit will display either the name or an alphabetically sorted dropdown of all specialties with that match. Click the ‘x’ to remove a specialty. The limit is capped at 40 specialties, however you will rarely need more than 5.



Specialties:

Start typing a specialty, or click the 'x' to remove a specialty

If you can't find a specialty needed: Specialties with smaller availability numbers are purposely folded into larger ones so if you can't find what you're looking for, choose a more general category.

FYI: Data sources vary.

- Specialties beginning with “Campus” will use data derived from the NSF Survey of Earned Doctorates (NORC).
- Specialties beginning with “Health Sciences” will use data derived from the Association of American Medical Colleges (AAMC).
- Specialties beginning with “Law” will use data derived from the Association of American Law Schools (AALS).

Contact Email & Department Mailing Address: Complete your contact name and email address. Verify your department mailing address (shown to applicants).

Recruitment Contact Email
 Analysts, administrators, and the online search committee will use this address.

Contact Name:

Contact Email:

Department Mailing Address
 The mailing address that applicants and references may use.

Address:

Finally, look over the information for accuracy and click the **Save & Done** button.

< Back **Save & Done**

Information [Edit](#)

Recruitment name: My Test Position

Department: International Programs-University Programs

Academic year: 2013 - 2014

Recruitment dates: July 7th, 2013 – January 7th, 2014 (January 21st, 2014)

Search breadth: Open search

Initial search allocation: Newly Allocated

Salary control number: 1234

Job information URL: https://staffing2.hr.uci.edu/CSS_External/CSSPage_BrowseJobs.ASP?r44b=no

Title Codes & Specialties [Edit](#)

Basic Recruitment Completed

The basic particulars are done but you will need to configure it further. If you're ready to input the required document and reference information, choose **Yes, Configure for Online Applicant Management** in the confirmation box. Or you can stop here and configure this at a later date.

Recruitment JPF00158 Successfully Created!

This Recruitment is eligible for **Online Applicant Management**. If you're ready to input the required document and reference information, choose "Configure for Online Applicant Management" below. Otherwise, to return to the Recruitment list, choose "Done for Now".

You can configure this position at a later date by using the "Configure for Online Applicant Management" link on the Recruitment list.

Configure the Recruitment for Online Applications

It's time to define the required and optional documents and references.

Note: After an applicant has applied to this position, you cannot change reference requirements or required documents, but you may add optional documents if you need to collect additional data from applicants.

Documents

Add Reorder

Document	Optional Comment or Description	Type	Actions
Curriculum Vitae	Your most recently updated C.V.	Required	Edit Delete
Cover Letter		Required	Edit Delete
Statement of Research		Optional	Edit Delete
Statement of Teaching		Optional	Edit Delete
Statement addressing how past and/or potential contributions to diversity will advance UCI's Commitment to Inclusive			

References

Type: * None - this recruitment does not require references
 Only contact information - only ask for reference email and address - letters will be requested by the department as needed
 Letters of recommendation - allow references to login and provide their letters when requested by the applicant

Number: * to

*Show references to:

Restrict reference viewing to certain members of the search committee

Documents Requirements. Define the required or optional documents to be provided by the applicants. The applicants will see any description you decide to provide (204 characters limit).

** Required Components can be found at the following link under the second drawer: **
<http://academicaffairs.ucsd.edu/aps/adeo/recruitment/procedures/ad-text.html>

Add: Define any additional documents, make them required or optional, and add a description.

Reorder: Adjust the order in which the requirements are listed for the applicants.

Edit: Change the name of a document, add a description, and switch it from required or optional.

Delete: Remove a document from the requirements.

IMPORTANT: After the first applicant has applied, changing the requirements is extremely restricted. It will only be possible to add optional documents. See the section, [Editing a Recruitment/Editing Document Requirements After Applicants Have Applied.](#)

References Requirements. You may choose to have your applicants provide self-solicited reference letters OR reference contact information with their application OR nothing at all. The reference requirements cannot be changed once the first applicant applies.

Type: Choose None, Only contact information, or Letters of recommendation.

Number: For contact information or letters, choose the minimum-to-maximum range required.

Search Committee Reference Viewing Rights: You may restrict who sees contact information or letters to certain search committee members: (1) All reviewers, (2) Only faculty members, (3) Only assistant, associate & full professors, (4) Only associate & full professors, or (5) Only full professors. This flexibility is important if departments wish to exclude any graduate students who may be serving on their search committee.

- Click the **Next** button and complete the information on the next page:

Help Email Address is the address where questions from applicants will be directed. This address is also used in the "From" line in a number of other correspondences between the department, applicants, and references. Refer to the text on the screen for those specific situations.

"Thank You" Email Sent to References is a fully customizable template that Recruit sends to references after their letters of recommendation are uploaded into the system. *See Appendix B for the default wording of this email sent to References.*

Help Email Address for Applicants

Email:
Questions from applicants go to this address

"From" Email Address

- This name and email address is used when UC Irvine AP Recruit sends an email to:
 - References, thanking them for their submitted letter
 - Applicants, when their application is manually created and/or activated
 - Applicants, to ask them to complete the diversity survey when the applicant is manually finalized

From (Name):
 From (Email):

Reference "Thank You" Email

Subject:

Body:

Look over the information for accuracy and then click the **Save & Done** button. A green, success box appears next, alerting you of what to do next.

[Back](#) [Save & Done](#)

Documents & References [Edit](#)

The documentation and reference requirements cannot be changed once your first applicant has applied

of documents: 2 Required, 4 Optional

Type of references: Letters of recommendation

of references: 1 to 3

Reference viewing rights: All reviewers

Email Settings [Edit](#)

Applicant help email: icastane@uci.edu

Reference "Thank You" To: Email address for the reference
 email: From: [Ivonne Castaneda \(icastane@uci.edu\)](#)
 Subject: Thank you for your contribution for [Applicant name] for Calit2 Kookoo's at UCI

Hello,

Thank you for submitting a letter of recommendation. Your letter is now available on-line for viewing by the faculty search committee.

Success

Your plan is now ready to be reviewed or published. To manage this plan, you can:

- [Edit Basic Recruitment Information](#) to update the position name and dates
- [Update Online Application Requirements](#) to change the documentation settings for your applicant pool

Find and View Recruitments

1. Click the **Recruitments** in the top menu bar.



Viewing Rights to the Recruitments

- Department analysts see all recruitments created under their department name.
- School analysts see all recruitments created in every department within their school.
- Committee Chairs and Editors see all recruitments they have been given access to.
- Committee Reviewers see all *published* recruitments they have been given access to.
- Approvers see all recruitments for which they've been named in a workflow for a Search Plan.

A new recruitment remains in a **Draft** state until it is approved & published. Draft recruitments are not visible to applicants or committee Reviewers.

JPF00594	Associate Professor-Cardiovascular	Draft
	Search Info	

Tools to Find Recruitments

Use the toolbar at the top of the columns:

Create New Recruitment	Change Columns	Download as CSV	Q- Name, JP#, Salary control #, etc	Search
------------------------	----------------	-----------------	-------------------------------------	--------

Change Columns. Add or reduce the information about the recruitments. Hint: Click directly on the column headers to sort the list.

Download as CSV. Recruit will create a comma-delimited file, “**recruitments-yyyymmdd.csv**” consisting of all the data within the columns on the page. Depending on your web browser, the file will: (1) open automatically in Excel, (2) go to a download directory on your computer, or (3) present a message asking you to either open or save the file.

Search. Zero in on the Recruitment you are looking for by typing in a search word and pressing return.

Recruitment Page Filters

Use the filter panel to fine-tune your list of recruitments:

Submission Dates
<input checked="" type="checkbox"/> Pending
<input checked="" type="checkbox"/> Open
<input checked="" type="checkbox"/> Closed but not Final
<input checked="" type="checkbox"/> Final and Closed
Dates
▶ Open Date
▶ Close Date
▶ Final Date
Academic Year
<input checked="" type="checkbox"/> 2013 - 2014
<input checked="" type="checkbox"/> 2012 - 2013
Recruitment Type
<input checked="" type="checkbox"/> Online
<input checked="" type="checkbox"/> Basic
Hiring Type
<input checked="" type="checkbox"/> Tenured / SOE
<input checked="" type="checkbox"/> Other Academic Positions
Other
<input type="checkbox"/> Has Applicants
<input type="checkbox"/> Show Inactive
<input type="button" value="Filter"/> <input type="button" value="Reset"/>

Submission Dates: Check which recruitments you want displayed. By default, you will see all, regardless of the submission date status.

Dates: This filter displays all recruitments based on their open, close, or final dates.

Academic Year: This filter shows all your recruitments by their academic year. By default, the two most recent academic years will be checked.

Recruitment Type: Do you want to display only recruitments that have been configured for online applicants or only basic recruitments? By default, both will be checked.

Hiring Type: Decide whether you display recruitments with Tenured title codes or those without. By default, both are checked.

Other: Filter for those recruitments with applicants vs. those without. Or filter for all Inactive recruitments.

Reset: *Your recruitment filters stay the same on this page as you move throughout Recruit. Click Reset when necessary.*

Working with the Search Plan

Find the recruitment and click either the “Search Info” link or the JP# number.

Submission Dates	JP #	Name	Department	Submission Dates	Actions
<input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Open <input checked="" type="checkbox"/> Closed but not Final <input checked="" type="checkbox"/> Final and Closed	JPF00594	Associate Professor-Cardiovascular	Department DEF	Open 1/27/2014 - 6/28/2014	Make Inactive

Details

The Details section summarizes the recruitment. Committee chairs, editors, reviewers, and approvers can view this section but only analysts can edit it.

Lecturer
 JPF00646 • Department booya / A School of Aliquid BC • Description

Search Info Reports Applicants (0)

Details

OPEN Applicants can now apply. [Review current applicants.](#)

Applicants can apply to the recruitment immediately, as it opened on Jun 9, 2014
<https://recruit.ap.uci.edu:31002/apply/JPF00646>

Download Search Plan
 Approved (1/1) on Jun 11, 2014
 Published on Jun 11, 2014 by Kim Gerrard • **Unpublish**

<p>General Information <input type="button" value="Edit"/></p> <p>Job # JPF00646</p> <p>Department Department booya / A School of Aliquid BC</p> <p>Title code 1100 - PROF-AY</p> <p>Type Senate / Tenured / SOE</p> <p>Salary control # 12345</p> <p>Academic year 2014/15</p> <p>Breadth Open search</p> <p>Initial allocation Newly Allocated</p> <p>Contact Information <input type="button" value="Edit"/></p> <p>Mailing address 5072 Considine Turnpike Emardview, Delaware 88467</p> <p>Faculty/Staff contact Irma A. Lyst</p> <p>Public contact Bea Winner</p> <p>Help contact bawinn@uc.edu</p> <p>More info http://www.ourdept/jobs.uc.edu</p> <p>Description <input type="button" value="Edit"/></p> <p>Our department is conducting a search for an individual of international reputation working at the forefront of interdisciplinary awesomeness with a proven record of engagement and collaboration with other members of this discipline.</p>	<p>Dates <input type="button" value="Edit"/></p> <p>Type Open/Close/Final</p> <p>Open date 6/9/2014 (Monday)</p> <p>Close date 6/9/2015 (Tuesday)</p> <p>Recruitment period 365 days</p> <p>Final date 6/9/2015 (Tuesday) <input checked="" type="button" value="Down Arrow"/></p> <p>Document Requirements <input checked="" type="button" value="FIRST APPLICANT"/> <input type="button" value="Edit"/></p> <p>Curriculum Vitae <input checked="" type="button" value="Required"/> <input type="button" value="Edit"/> Your most recently updated C.V.</p> <p>Cover Letter Statement of Research Statement of Teaching Misc / Additional</p> <p>Reference Requirements <input checked="" type="button" value="FIRST APPLICANT"/> <input type="button" value="Edit"/></p> <table border="0"> <tr> <td>Type</td> <td>Letters of recommendation</td> </tr> <tr> <td># required</td> <td>1</td> </tr> <tr> <td># optional</td> <td>4</td> </tr> <tr> <td>Visible to</td> <td>All reviewers</td> </tr> </table> <p>Internal Analyst Notes <input type="button" value="Edit"/></p> <p>Similar to prior search in 2013.</p>	Type	Letters of recommendation	# required	1	# optional	4	Visible to	All reviewers
Type	Letters of recommendation								
# required	1								
# optional	4								
Visible to	All reviewers								

URL for Applicants: A unique URL for the recruitment is displayed in the status box at the top of the screen. It's used for job ads, postings, electronic mailings, and links on other websites.

The Status of the Plan: Dynamically changing status boxes appear at the top of the Details screen that help the analyst know what they need to do next. The prompt guides the analyst through the search plan approval process and all the way to the end of the search. The following show various states for a recruitment.

DRAFT When this recruitment plan is ready, [submit it for approval.](#)

PENDING APPROVAL Recruitment plan is under review. [View approval request \(0/2\)](#)

READY TO PUBLISH All approvers have approved. [Publish now](#)

PENDING Recruitment has not yet opened.

OPEN Applicants can now apply. [Review current applicants.](#)

CLOSED Applicants are making final edits. [Review current applicants.](#)

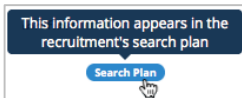
FINAL Applicants can no longer make changes. [Review applicants.](#)

INACTIVE This recruitment is inactive. [Make active](#)

Diversity

Committee chairs, editors, reviewers, and approvers can view this section and analysts can edit the section. Chairs and editors can also edit the Equity Advisor Role field.

Note: Look for icons that serve as indicators telling you whether the information is part of the **Search Plan** or **Search Report**. Roll over the icon with your mouse to reveal the helper text as shown here:



Details

Diversity

Advertisements

Qualifications

Selection Process

Committee

Documentation

Disposition Reasons

Search Outcome

Diversity

Specialties and Benchmark Data SEARCH PLAN Edit

The diversity of candidates available in each specialty identified.

Specialty	Male	Female	African American	Hispanic	Asian	Native American	Minority Total %	White
Campus: Human development and family studies	24.9%	75.1%	6.6%	3.4%	3.9%	0.5%	16.0%	84.0%
Campus: Art education	23.6%	76.4%	6.7%	3.1%	5.7%	0.7%	18.8%	81.2%
Average	24.6%	75.4%	6.6%	3.3%	4.3%	0.5%	16.7%	83.3%

Pool Diversity

The diversity of the pool as the search progresses. Watch for any large shifts from one row to the next.

Pool	Male	Female	African American	Hispanic	Asian	Native American	Minority Total %	White
All Responses	48.0%	52.0%	24.4%	19.9%	22.2%	18.2%	84.7%	15.3%
All Applicants <small>see candidates</small>	48.4%	51.6%	24.7%	20.1%	21.8%	18.4%	85.1%	14.9%
Shortlist <small>see candidates</small>	48.8%	51.2%	24.7%	20.1%	21.8%	18.4%	85.1%	14.9%

Affirmative action goal SEARCH PLAN Add

[Learn more about your unit's AA goals](#)

Not specified

Equity Advisor SEARCH PLAN Add

Edward Equity Advisor <ap-no-reply@recruit.ap.ucl.edu>
recruit & Proxy

Equity Advisor Role SEARCH PLAN Add

The Diversity section includes:

Specialties and Benchmark Data: lists the recruitment’s specialties and the corresponding national availability data that is provided via the UC Office of the President to Recruit. **Note:** The average takes into account the number of individuals in each specialty, so a specialty with many individuals will have a bigger impact on the overall average than a specialty with fewer individuals.

Pool Diversity: This table enables search committees charged with ensuring a diverse applicant pool to better perform that task.

- When there are less than 5 responses to the first two rows, the percentages are suppressed.
- Equity Advisors, Diversity Analysts, and Recruit Admins have access to personally identifiable gender and ethnicity via their “See candidates” link.

16.

Affirmative Action Goal: Identify the affirmative action goal for the title series in the campus academic affirmative action plan by indicating which groups are underutilized on the campus for the specific job grouping.

Equity Advisors: The Equity Advisor will be named in this section. HOWEVER, the name will appear only if 1.) a Recruit administrator has assigned the Equity Advisor role and 2.) the recruitment is for a regular rank series-tenured/tenured track. Otherwise, this section will be blank.

Equity advisor role: Use this optional field to write a description of the role the above stated equity advisor will play in this search.

Advertisements

This section is for all documentation related to advertising. Analysts, committee chairs and editors can view and edit express fields in this section. Committee reviewers and named approvers (in the roles of Equity Advisor, Diversity Office Director, Academic Personnel Director and Executive Vice Chancellor) can view the advertisement section (but can't edit).

Planned Search & Recruitment Efforts [SEARCH PLAN](#) [Edit](#)

Asking faculty to contact colleagues to help identify excellent potential underrepresented candidates (especially females).

Contacting female members of engineering and computer science professional societies.

Approach potential candidates at professional meetings and conferences and encouraging them to apply for the position.

Actual Search & Recruitment Efforts [SEARCH REPORT](#) [Edit](#)

Actual search & recruitment efforts were followed as specified under the "Planned Search & Recruitment Efforts" section. Evidence of advertisements sent out about the position are included in the "Ad Evidences" section. The mailing lists for the Women in Math Psych and the Women in Cognitive Sciences were targeted to help increase the number of female applicants for this position.

Ad Documents [SEARCH PLAN](#) [Upload](#)

File	Comment
Computational Neuroscience Ad Edit Delete	original advertisement - short and long versions. <small>Last modified Jul 9, 2014 11:27am by Clara Kwon Schultheiss</small>

HERC Category [SEARCH PLAN](#) [Edit](#)

Social/Behavioral Sciences

Ad Sources [SEARCH PLAN](#) [Add](#)

- Observer - Journal for the Association for Psychological Science (APS) [🔗](#)
- Various psychology, computer science and engineering related websites [🔗](#)

The Advertisement section includes:

Planned Search and Recruitment Efforts: This section is to describe all *planned* efforts to reach a broad and inclusive applicant pool.

Note: Information is required to submit the Search Plan and the field becomes locked after approvals. Locking helps ensure that the efforts will not change based on what happens during a search. To cue you, lock icons appear in the field along with a tool tip when the icon is rolled over. For minor editing only, the lock may be overridden by a Recruit Administrator.

Actual Search & Recruitment Efforts: Return to this field later to enumerate all efforts taken to reach a broad and inclusive applicant pool. This information is required to generate all of the recruitment's reports.

Ad Documents: Upload your ad drafts and final ad copy here. Files must be a PDF, TXT, or an image. The comments field may be used in any way that may be helpful for your approvers.

Navigate to your file on your computer, optionally add a comment, and click **Upload file**.

Upload Ad Documents

* File (must be a .pdf, .txt, or image):

Choose File Advertisements-ad.pdf

Name of Description of uploaded file:

Text of ad copy

Comment:

Draft #1. Please review.

Upload file Cancel

HERC Categories: Select a HERC category to ensure the best visibility for your job posting in HERC (Higher Education Recruitment Consortium).

Ad Sources: Simply list the various places where your recruitment will be advertised.

Ad source

Name:

Journal of English Literature

Cancel Add ad source

Ad Evidence: For OFCCP (Federal audits), copies of actual ads will be needed. This information should be included in the recruitment's *Search Report*.

Return to this area when you can provide proof that an advertisement was placed.

Ad sources must be entered in order to upload evidence. Choose your ad source from the drop-down menu. Navigate to your file on your computer, optionally describe the file and add a comment if you want. Then click **Upload file**.

******ADEO will upload tearsheets for HERC, AJE, and DiverseJobs as the EVC-AA and VC-EDI purchase these ads for all academic recruitments. ADEO is not responsible for purchasing or uploading any additional advertisements******

Search Sources: This hard-coded list corresponds to the choices on the applicants' diversity surveys. As applicants submit their surveys, the number of responses displayed here will change dynamically, assisting you in your outreach efforts.

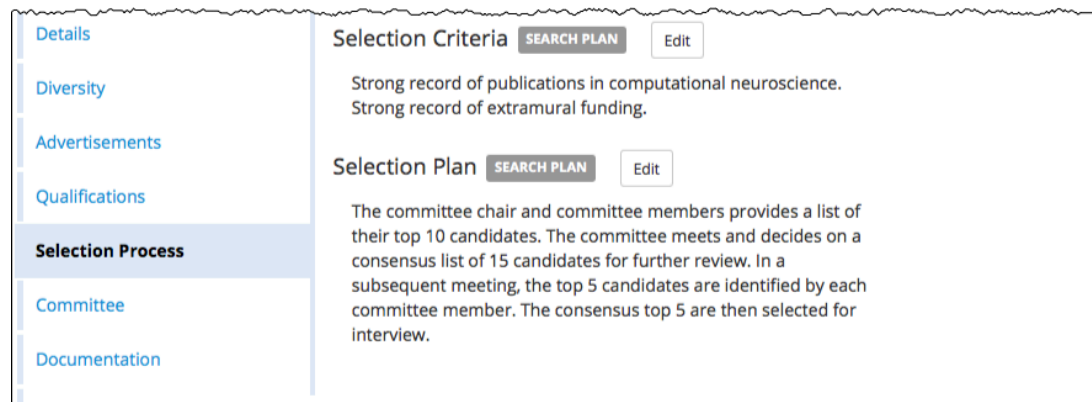
Qualifications

This section is to document the qualifications required of an applicant and should be reiterated in all advertisements for the position. Committee reviewers and named approvers can view this section. Analysts, committee chairs, and editors may view and edit the fields in this section.

Note: These fields will no longer be editable after the Search Plan has been approved, effectively restricting the ability to retroactively change the recruitment's goals to suit a particular candidate. Lock icons appear to cue you and a rollover tool tip explains the lock. For minor editing only, the lock may be overridden by a Recruit Administrator.

Selection Process

This section is for analysts, chairs, or editors to document the job related criteria and the committee's plan for the selection of candidates. What will the committee base their decisions on? Approvers and reviewers have read (not write) access to these fields.



The Selection Process section includes:

1. **Selection criteria:** This area is to provide a detailed description of the selection criteria to be used in evaluating candidates in priority order.
2. **Selection plan:** Document how the search committee will evaluate the applicants and select the shortlist and finalist (Phone interviews, in-person interviews, etc.)

Committee

This section is where analysts assign committee roles on a recruitment-by-recruitment basis so when the members log into Recruit, they will have the proper access to recruitments and applicants. Any committee member and named approver can view this section but only analysts may add/edit members.

Committee permissions:

The designation between “Core” members and “Additional” members helps to satisfy annual reporting requirements for the Office of the President regarding applicant pools and search committee demographics. Identify the *core* committee as part of the Search plan.

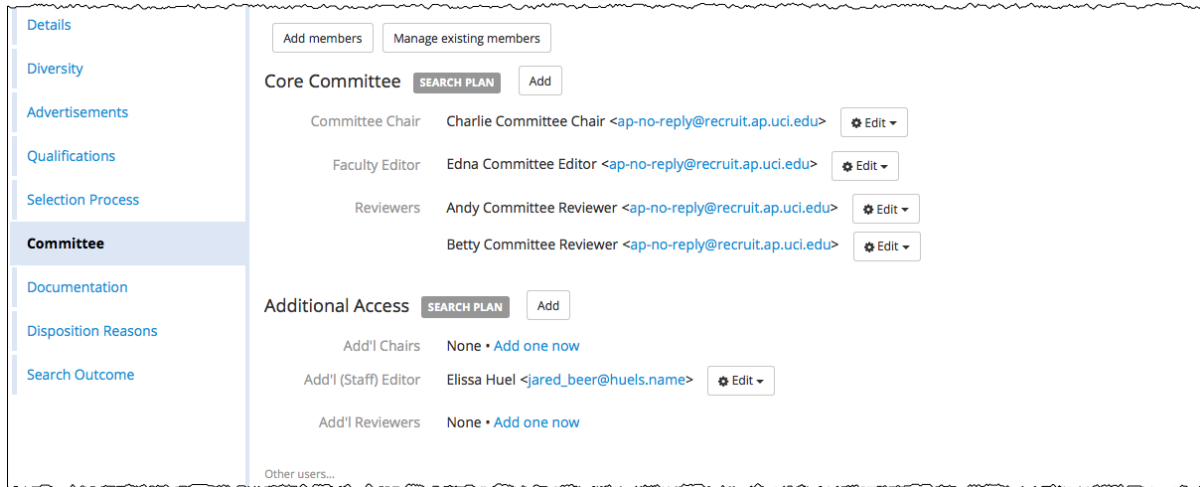
- **Core Committee Chairs** will see all applicants, regardless of whether the applications are complete or not and like analysts, Chairs have complete management rights over the applicant's files. Chairs also are able to make changes to many parts of the various fields in the recruitment's setup sections.
- **Core Faculty Editors** have the same access rights as committee Chairs and are able to assist the analyst in managing the applications.
- **Core Reviewers** have read-only rights to *only* completed applications. However, Admins can use the Edit button to grant Reviewers disposition permissions, allowing reviewers to disposition completed applications.

Add'l Chairs, Add'l Editors, Add'l Reviewers are technically not part of the committee, but may be called in to help review the applications. They have the same access rights as their counterparts.

Setting up the Search Committee—Quick Add

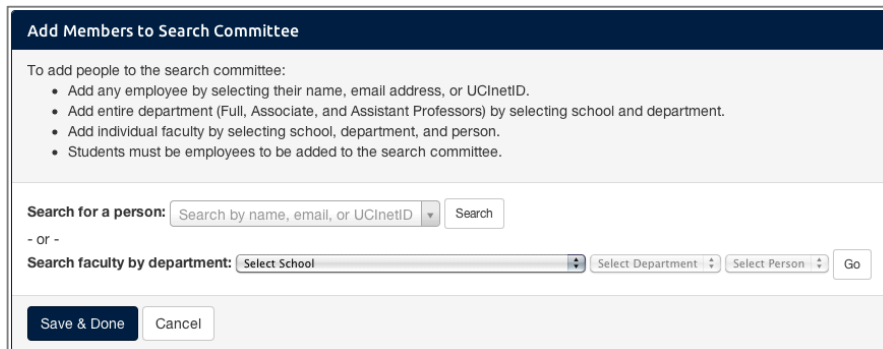
The **Add** button is a quick way to add members one at a time. Click the **Add** button in the Core Committee part of the page.

1. Choose a role and then start entering the person’s first or last name, email address, or campus ID into the search box.
2. Click the Add Button after selecting a role and a finding a user.
3. The name will be added in the appropriate section.

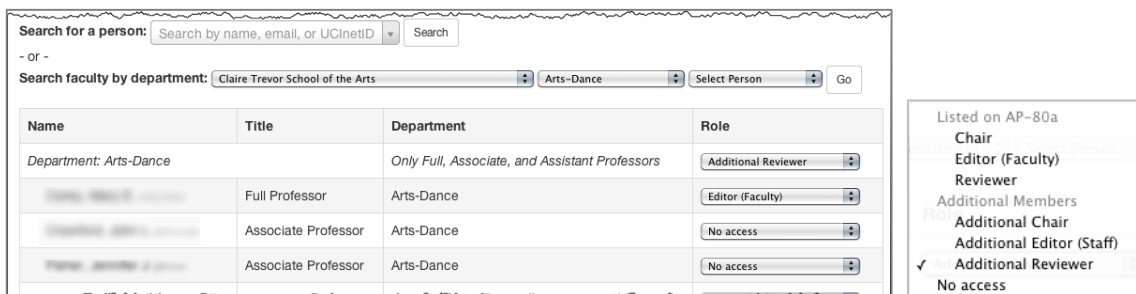


Setting up the Search Committee – Adding members in bulk

1. To add members using an extended search click the **Add members** button. In this view, you can add faculty from entire Schools and Departments at once.



2. Designate each person’s role in the committee using the drop-down selector. Click **Save & Done** when finished.



To edit, click “Change role” or “Remove” below the names OR click, **Manage existing members**.

Manage existing members

Documentation

This section is for archiving and retrieving various materials associated with the recruitment. Files must be uploaded as PDF, TXT, or images. Analysts, committee chairs and editors can view and edit express fields in this section. Committee reviewers and most named approvers can view the documentation section (but can't edit).

File	Applicant	Comment
email from Chair to Dean Edit Delete	Bailey, Mortimer	In regards to candidate. <small>Last modified May 2, 2014 4:01pm by Kim Gerrard</small>
Informal Offer Letter Edit Delete	Johnson, Wyatt	Offer letter detailing terms of appointment. <small>Last modified Jul 24, 2015 2:03pm by Kim Gerrard</small>

The Documentation section includes:

Search Plan Documents: Store any miscellaneous documents associated with the search that needs to be kept for the electronic record.

Letters & Memos: The documents you upload here will be part of the permanent record and included in the final search report.

1. Click **Upload** and choose the file from your computer.
2. Enter the name of the letter/memo.
3. Add a comment if needed.
4. Optionally associate the letter/memo with an applicant.
5. Click **Upload File**.

Interview Materials: Include materials such as: interview questions, committee notes from interviews, interview schedules for on-campus visits, notes about meetings, etc. The documents you upload here will be part of the permanent record and included in the final search report.

1. Click **Upload** and choose the file from your computer.
2. Give the item a name.
3. Add a comment if needed.
4. Optionally associate the item with an applicant's name using the drop-down selector.
5. Click **Upload File**.

Disposition Reasons

The Disposition Reasons section includes:

Applicant Disposition Status Panel

Analysts use this panel to see which applicants need disposition reasons before running a Search Report. Click on one of the links to be taken directly to the disposition reasons assignment page for those applicants who are missing reasons (or a comment). If you have complete applicants who have yet to be marked as Meets or Doesn't Meet Basic Qualifications, there is a link for that as well.

Applicant Disposition Status SEARCH REPORT		
Disposition reasons (or comments) must be assigned for all complete, on-time applicants who have not withdrawn.		
Application period	Review date	Disposition status
● Jul 2, 2015 – Sep 1, 2015	Sep 1, 2015	14 applicants are missing disposition reasons Hide details ▲
● Meets basic qualifications		12 applicants are missing reasons
● Does not meet basic qualifications		1 applicant is missing reasons
● Unknown qualifications		1 applicant must be marked as Meets or Does not Meet basic qualifications
☑ Jun 1, 2015 – Jul 1, 2015	Jul 1, 2015	There are no applicants in this review window Hide details ▲
☑ Meets basic qualifications		There are currently no applicants who require disposition reasons
☑ Does not meet basic qualifications		There are currently no applicants who require disposition reasons

Disposition Reasons List

This section displays the system's default reasons used to assign to applicants and the ability to customize them. Disposition reasons justify why applicants didn't move forward in the hiring process and is an important component of the final *Search Report*. Any committee member and named approver can see this section but only analysts may specify custom reasons.

- Diversity
- Advertisements
- Qualifications
- Selection Process
- Committee
- Documentation
- Disposition Reasons
- Search Outcome

Disposition Reasons SEARCH PLAN

For applicants marked as **meets basic qualifications**

Custom Add custom disposition reasons

System-wide

- Alternate for position
- Duplicates or significantly overlaps existing area of strength in department/school/college
- Interview showed some deficiencies
- Job talk showed some deficiencies
- Lacks sufficient clinical experience
- Lacks sufficient contributions to diversity/cultural competence
- Lacks sufficient depth/breadth of research/creative excellence or impact
- Lacks sufficient leadership experience for position
- Lacks sufficient potential for successful attraction, advising, and mentoring of students/trainees/postdocs
- Lacks sufficient research achievement/potential
- Lacks sufficient teaching achievement/potential
- Other, please specify
- Publication record shows some deficiencies
- References were weak
- Specialization or area of expertise for position or department needs shows some deficiencies

[Manage suppressed reasons](#)

For applicants marked as **does not meet basic qualifications**

Custom Add custom disposition reasons

System-wide

- Application was incomplete, materials submitted were not the required materials
- Candidate withdrew
- Degree was not in the advertised field(s) if specific field(s) were required
- Did not meet stated basic clinical requirements
- Did not meet stated basic research requirements

Customize disposition reasons: Analysts may customize the lists if the default reasons do not meet their needs for a particular recruitment. Once the first applicant applies, the reasons are no longer customizable and a Recruit administrator must be contacted.

1. Click the button, **Add custom disposition reasons**.

Add custom disposition reasons

2. The custom reasons dialog box opens. Click "Add custom reason."

3. Type a customized disposition reason and click the “Add” button beside it.
4. Add up to 5 custom reasons.
5. Save Changes.
6. The custom reason appears at the top of the list of disposition reasons.
7. To edit, click “Manage custom reasons.”

[Manage custom reasons](#)

Suppress disposition reasons: Analysts may suppress any of the reasons to trim the list if needed. After the first applicant applies, only the Recruit administrator may suppress reasons.

1. Click “Manage suppressed reasons.”

[Manage suppressed reasons](#)

2. Uncheck a reason to suppress.
3. Save Changes.
4. To edit the disposition reasons click “Manage suppressed reasons.”

Search Outcome

This section allows analysts to specify the initial search outcome — whether the search was successful at identifying any candidates— so that information can be included as part of the search report. Any committee member and approvers have read (not write) access to this section.

1. Click “Select the initial outcome of this search.”

2. Make a selection (Proposed candidate, Failed-no candidate, or Canceled) .You may add notes about the outcome of the search.

3. Recruit will alert you if Proposed candidate is selected and if no candidates have been updated to a proposed status,

Alert: There are currently no applicants with a status of "Proposed Candidate". Before creating the search report, be sure and update all applicant statuses to show which applicants are proposed candidates. [Manage applicants now](#)

4. You may clear the initial search outcome, for those occasions when you might have clicked the wrong button, or jumped the gun a bit. Click "Edit," then "Clear."

Search Plan Approvals

After all necessary information based on the department's search business practices is provided, the analyst submits the search plan for approval(s).

Submit the Plan for Approvals

1. Return to the recruitment's **Details** section and click the link, **Submit it for approval**.

DRAFT When this recruitment plan is ready, [submit it for approval](#).

2. The system *should* assign approval workflows containing lists of steps. If you think this is not the correct workflow, stop here and report this using the contact Support link.
3. Otherwise, click **Yes, submit for approval**.

Support.' and has 'Yes, submit for approval' and 'Cancel' buttons."/>

4. The Plan **Approval Request** screen opens:

Specify person. Each step *must* have at least one specified person. In some cases, the system automatically assigns the person. For those steps not assigned:

1. Click the link, “Specify person.”



2. Enter the person’s email address or UC San Diego AD into the box.
3. Click **Add**.

Remove specified person. (ex: “I typed the wrong user name here; let me fix that.”) To remove a name you have specified:

1. Click the “Remove” link beside the person’s name.
2. **Note:** Analysts cannot remove any users that were automatically assigned by the system.

Assign alternates (ex: “I know he’s on sabbatical; let me fill in the interim chair.”) If you name an alternate approver, only one person needs to approve. In other words, both “signatures” are not necessary.

1. Click the link, “Add alternate approver.”



2. Enter the person’s email address or UC San Diego AD into the box.
3. Click **Add**.

Augment steps with additional steps (ex: “we also need the Principal Investigator’s vote”).

1. Click the link “Add step.”



2. Choose a role from the list and place into position within the workflow.

- Once added, don't forget to specify a person for the new step!

 Specify person

Reorder Steps. (ex: “let’s not bother the Dean until the Principal Investigator says yes”).

- Click the link, “Reorder steps.”

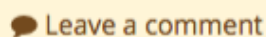
 Reorder steps

- Place your cursor over the icons and drag the step into place.
- Click “Save changes.”

Download Plan. Take a look at the PDF of the plan. This is what your approvers will be reviewing.

 Download plan

Comments. Attach a comment, question, etc. to be logged for the electronic record.

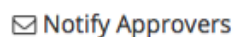
 Leave a comment

Automatic Approver Emails. Automatic email notifications are sent to approvers and cc'd to analysts submitting the plan. The notifications include a direct link to the approval screen where approvers may download the plan, comment, and approve. See Appendix A, “How Approvers Use Recruit” and Appendix B, “Notifications Sent to Approvers.” Here are other details about how the approval emails work:

- ❖ *Approvers who are next in line in the workflow receive an email. (The arrow points out the step.) A copy is also sent to the analyst who submitted the approval.*
- ❖ *If a step is approved before it is the current step, the email is suppressed.*
- ❖ *If there are multiple people listed in a step (alternates), all receive the email simultaneously.*
- ❖ *The email template for optional approvers have slightly different wording: “Your approval is **requested**” rather than “**required**.”*
- ❖ *When a current step is approved and if the next step is marked as optional, all approvers for the subsequent mandatory step are sent an email.*

Notify Approvers. Approvers are automatically notified when it is their turn to approve but you may prod the approver who’s taking too long, warn the pending approvers about what’s coming their way, or highlight a change that previous approvers might need to know about.

- Click the “Notify Approvers” button.

 Notify Approvers

2. Type the message and choose whom to send it to.

Notify Approvers ✕

Your message will be sent via email to the specified approvers, and saved as a comment. Remember that approvers are automatically notified when it is their turn to approve.

Message

Email text (a link is included automatically)

Send to

All approvers those who have approved, plus those people who have not yet approved.

Previous approvers those who have already approved.

Current approver those who are next in line to approve.

Pending approvers those who have not yet approved, including the current approver.

3. Click "Send Email."

Monitor Approvals In Progress

Use the top menu **Approvals** link to monitor approvals in progress:

Home Recruitments **Approvals** Help Hello, AP Department Analyst 3 - Remove Proxy | Logout

Home - Approvals New approvals dashboard for all analysts.

Approvals

(option to change what you see here)

All Requests	Type	Name	Approvers	Requested On	Last Approved On	Last Approved
<input checked="" type="checkbox"/> Search Plan	Search Plan	Testing a Basic - Row 14 (JPF00547) Approval details (1/1) Search Info (Get to the details here)	✓ Chair	Jan 15, 2014 3:08pm Marian Nedelchev	Jan 15, 2014 3:08pm Marian Nedelchev	6 months ago
<input checked="" type="checkbox"/> Applicant Pool Report	Search Plan	Basic Recruitment - nothing fancy - Row 11 (JPF00514) Approval details (1/1) Search Info	✓ Chair	Jan 15, 2014 4:32pm Marian Nedelchev	Jan 15, 2014 4:43pm Marian Nedelchev	6 months ago
<input checked="" type="checkbox"/> Shortlist Report	Applicant Pool Report	Switcheroo Recruitment Two (JPF00568) Approval details (1/2) Search Info	✓ Chair → Dean	Jan 17, 2014 11:20am Kim Gerrard	Mar 27, 2014 2:27pm Charlie Committee Chair	3 months ago
<input checked="" type="checkbox"/> Search Report	Search Plan	OCF Recruitment Test Emails (JPF00588) Approval details (1/1) Search Info	✓ Chair	Jan 17, 2014 4:37pm Marian Nedelchev	Jan 17, 2014 4:37pm Marian Nedelchev	6 months ago
<input type="checkbox"/> Pending	Search Plan	Assistant Professor of Psychology (JPF00591)	✓ Equity Advisor	Jan 24, 2014	Jan 24, 2014	5 months ago
<input checked="" type="checkbox"/> Approved						

(see who's approved and who hasn't in this column)

Publish the Approved Plan

Publish a recruitment to make it available to applicants to apply and to the search committee to review.

1. When a plan is completely approved, a **Publish** link appears in the Details screen status box.

READY TO PUBLISH All approvers have approved. [Publish now](#)

2. Confirm that you would like to publish the recruitment.

Don't forget to publish. Unpublished recruitments mean that the recruitment will languish and you won't receive any applicants!

To Unpublish a Recruitment

This flexibility built into Recruit allows an analyst to pull the recruitment back to a plan. Unpublishing does not remove any approvals so if changes are made, analysts may need to solicit re-approval off-line. An Unpublish link appears at the top of the Details page and is available up until the first applicant applies.

Published on Jul 10, 2015 by Xen Eldridge • **Unpublish**

Editing the Recruitment

Editing an Approved Plan

The flexibility of Recruit allows editing of any area of the plan, even after approvals — and the PDF will be updated accordingly. But be advised, once a role has approved the plan, there is no re-approving it *for that role*. In other words, if your Dean has approved the plan and then you make a change, Recruit does not provide a way for you to resubmit the plan for approval to the Dean a second time.

If you wish to change the ad after approvals, please contact ADEO.

Editing a Published Recruitment

Once published, the final PDF of the approved plan is available for download. This is a snapshot in time; a historical record of what was approved. If you make changes to the recruitment of any kind after it is published, the change will not be reflected in the PDF. Your own department's business practices should dictate when it is prudent and necessary to edit information that has already been approved and/or published, just as you would in a paper process.

Use the inline edit buttons on the **Details** page to edit information related to the recruitment.

General Information

Edit the position name, department, title codes, salary control # proposed salary, etc.

Contact Information

Customize how various parties can inquire about the recruitment.

Description Update this public-facing, important field.

Dates Edit the open, close, final dates, add review dates, or change submission date type.

Document Requirements Requirements are fully editable until applicants appear in system.

Reference Requirements Requirements are fully editable until applicants appear in system.

Internal Analyst Notes Add and edit any special notes.

Special Editing

Additional Review Dates

Your initial review date has passed and you need to add another review date. On the Details page, click the inline **Edit** button beside **Dates**.

Dates

Click the link, “Add new review date.” If this link doesn’t show, then the previous review date has not passed and you will have to wait to specify additional review dates.

Edit Dates

Open date:
October 13th, 2014

Initial review date:
November 30th, 2014
Public - shown to applicants Private - hidden from applicants

[Add new review date](#)

Final date:
Dec 31, 2015

The recruitment will no longer be available to applicants after this date

Type in a new review date in the box provided. By default, the new date is “Public”, meaning you want all applicants to be aware of the review date when they apply.

Sample Scenario: In the example shown to the right, the new review date (April 17, 2015) acts as the last modification date for a new group of applicants and Recruit will send reminders to them to finish up a few days prior. If they complete their application after their review date, their application dashboard will display the fact that they may not be reviewed or considered for the position.

New review date:
Apr 17, 2015

Public - shown to applicants Private - hidden from applicants

Editing Department Names: Cross-listing Recruitments

Sometimes academic positions are shared between units (Departments, Schools, Divisions, etc.) and this is often described in the advertisement. Recruit supports this, resulting in:

- The recruitment can only be managed by the analyst of the home department. Analysts from crosslisted units will not have analyst access.
- the recruitment is displayed beneath the name of the home department and also beneath the cross-listed unit(s) on Recruit's Apply page.
- the applicant's dashboard displays the name of the home department and also the cross-listed unit(s).
- Once a candidate is proposed, Recruit's Offer Proposal Form lists each unit for the analyst to indicate the allotment of salaried time.

Analysts may cross-list between units for which they have access. For example, School analysts may cross-list between any departments within their school.

1. A lead analyst first creates the recruitment. This recruitment now belongs to a home department.
2. Return to the **Details** section of the recruitment.
3. Click the inline Edit button beside **General Information**.



4. Click the link, "Add crosslisted unit."

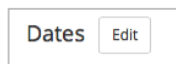


5. Place the cursor in field and select from the drop-down list of unit names.
6. Click Save Changes.
7. **Note:** If the list doesn't show the unit you wish to cross-list, contact a Recruit Administrator at the Academic Personnel Office for assistance.

Editing Submission Dates: Changing the Recruitment Submission Type

Before any applicants apply, you may switch the recruitment type between OCF and IRD.

1. On the Details page, click the inline Edit button beside Dates.



2. The Edit Dates editor opens. Click the link, "Change recruitment type." You may roll your mouse over the tool tip to learn the difference between the types.



3. You'll be required to enter a Close date when changing from an IRD to an OCF.
4. You'll be required to enter an Initial Review Date when changing from an OCF to an IRD.
5. Once the dates are set, click the button "Change to Open/Close/Final" or vice versa to make the switch.

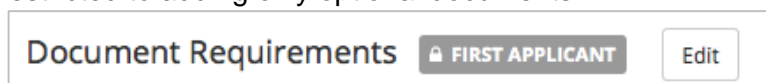
6. The Details screen will note the new type in the Dates section - either Open Closed Final or Review Dates.
7. The changed submission dates will display correctly to applicants on the Apply page and on application dashboards.
8. You may also use "Change recruitment type" as a toggle. For example, if the IRD dates are amiss, try changing the type to OCF, then back to an IRD and fix the dates accordingly.

Note: Changing the submission type could have an impact on the applicants. Please consider carefully before making the switch and consider notifying existing applicants using Recruit's bulk email feature.

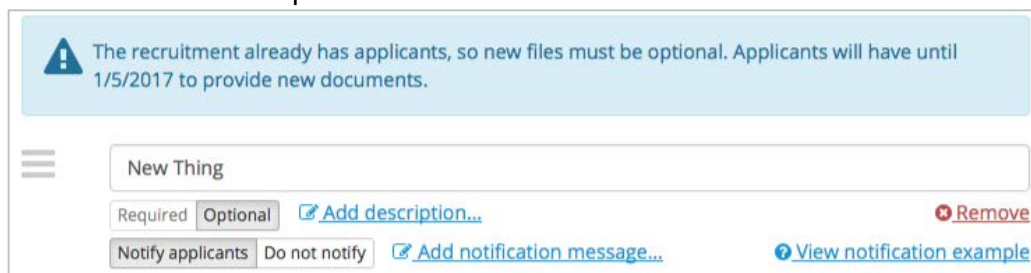
Editing Documents Requirements (after applicants have applied)

After your first applicant has applied, you can **only add optional** documents. Adding an optional document should not be done lightly, as it affects all current applicants, complete or incomplete. It is highly recommended that you use Recruit's built-in email notification to alert existing applicants about the change.

1. Return to the **Details** section of the recruitment.
2. Click the inline Edit button beside **Document Requirements**. If a lock icon appears next to "First Applicant", this indicates that there are already applicants. Editing requirements will be restricted to adding only optional documents.



3. Scroll to the bottom of the edit form and click "Add another optional document."
 - [+ Add another optional document](#)
4. An alert reminds you that there are applicants. Name the new, optional document and expand the link to add a description.



5. Click "Add notification message." To see a sample of the notification, visit the Help Docs by clicking the link, "View notification example."
6. Compose your message in the box provided and click the button, "Notify applicants."
7. Click "Save Changes."

Save changes

8. The newly added optional document cannot be edited/changed after being added.

9. Verify the new, optional document appears in the list of requirements on the **Details** page.

If a notification email was sent, the applicant's log will document this with a timestamp: "Email sent: UC Recruit Optional Document Requested."

Part 2: Applicant Pools and Individual Applicants

The Search Plan has been approved, published and applicants have begun applying. Locate the applicant pool from the **Recruitments** page.



Locate the link beneath the name of the recruitment.



Note: For analysts, editors and chairs the number in parenthesis is the total number of people who have *applied*. For reviewers, the number represents *completed* applications.

Tools to Use with the Applicant List

Column Sorting. Click directly on most column headers to sort the applicant list.

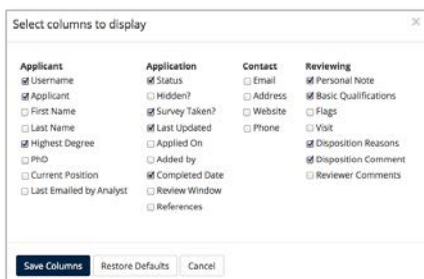
Search Box. Zero in on the applicant you are looking for by typing in a search word and pressing return.

Change Columns. Add or reduce the information about the applicants.

1. Click the button at the top of the list of names, “Change Columns”.



2. Check the boxes to determine what to display on your screen. Then **Save Columns**.



Download Applicant Data: This is a useful tool to create lists of applicant names, addresses, and other column criteria to take to a meeting or use for mail merges.

Recruit will build a comma-delimited file consisting of the applicant/applications list and the data fields that have been pre-selected from the column options.

1. Click the button, **Download This Data** for all column data displayed.
2. Or for a simpler list, click **Download Names & Addresses**.
3. Depending on the web browser —
 - the file will download to the usual download area on the user's computer OR

- the file will open automatically in Excel OR
- the browser will present a message asking the user to either OPEN or SAVE it.

The Filter Panel: Use the advanced filter panel to fine-tune your list of applicants.

1. Use “Reset” when you want to restore the applicant list to the default state.
2. If you click away from this screen, your filters will persist.
3. Committee reviewers do not have the **Hidden** filter.

Show: Set a filter to show applications that have been hidden from the committee.

- Check the box and click the Filter button at the bottom of the panel.

Status: This filter allows you to pick and choose which applicants to display based on the applicants' various statuses.

- Make your selection
- Click the Filter button at the bottom of the panel.

Review Window Slider Mechanism (available only for IRD recruitments):

Adjust the sliders if you want to see only those applicants who applied by a certain review date. If you want to see everyone, move the two thumbs as far apart as you can – as illustrated here. Think of it like opening the window to see the widest possible view. Remember, Committee Reviewers see only completed applicants.

Dates:

- Choose: Last Updated, Applied On, or Completed Date.
- Choose a date range: On or before, On or after, On, or Between.
- Choose a date.
- Click the Filter button at the bottom of the panel.
- Adjust the columns to see the results of the date filters.

NOTE: The following actions will trigger the time/date stamp change in the “Last Updated column”:

1. Any change made to the documents provided.
2. Any change made to the references (removal, contact info changed, etc).
3. When a reference letter has been uploaded into the system.
4. Any change made to an applicant's personal information.
5. When an applicant is manually completed (or reverted back again).
6. When an applicant is purposely hidden (or unhidden) by the analyst, chair, or editor.

Filtering the list of applicants.

Mark as Read: This is a way for you to check off applicants that have been reviewed. The feature is available to all users with applicant viewing rights but the checkmarks are private and not viewable by one another.

1. Locate the applicant or applicants in the list and put a check in the empty box in their row.
2. Then click the "Read" button in the row at the top of the list of names.

3. A green indicator will appear in the applicant's row.



- If an application is updated since you marked it as read, an alert icon will cue you.



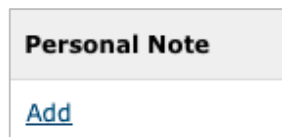
Hide / Unhide an applicant: Only Analysts, Chairs and Editors have this tool. Recruit never deletes an application but “Hide” comes close. This may be useful if an applicant has applied to the wrong position or applied twice. Use this tool with caution! When you hide an application, it’s hidden from everyone else too.

- Locate the applicant in the list and put a check in the empty box beside the name.
- Then click the "Hide" button in the row at the top of the list of names.
- Committee reviewers will no longer see this applicant.



Add Personal Note: This is a way to jot yourself a note about an applicant. The feature is available to all users who can view the applicants. Notes should be limited to those that are job-related, as they become part of the electronic record.

- Click the link, "Add" in the Personal Note column beside the applicant's name.



- Type a note up to 255 characters.
- Click "Save".
- To view your longer notes, click on the ellipses.
- Click the *Edit* link to edit your note or remove it.

Manage the applicant/application: Only analysts, chairs, and editors have the manage link below the name of each applicant. Managing applicants/applications is covered in another part of this manual.



Check the Applicant's Log: Check the time-stamps of all the actions that have taken place on/within an applicant's application.

- Click the “Log” link below an applicant's name.
- Read the log and close it when you are finished.



Download the applicant's documents: Obtain a PDF bundle of all an applicant's documents with one click. Click the "Download" link found beneath their name.



Progress dots: Roll over the color-coded dots beneath an applicant's name for quick visual of what requisites are done and what is still needed in order to be a complete application. When a requisite is fulfilled, the corresponding dots fill in solidly.



A Cue to Know When an Applicant is not visible to the Reviewers: Roll over this icon to quickly determine why that applicant is not being shown to the search committee.



Email the Applicants

Use a template to compose a single message to send to one or more applicants. Only Analysts, Chairs and Editors have this tool.

1. First, put a check in the empty box beside all of the name(s) of applicants you wish to contact. A check in the top header box will select all names.
2. Then click "Send Bulk Email" in the row at the top of the list of names.

Send Bulk Email

3. A template opens:

Email Applicants

To:
2 applicants

* From:
"Joan Dept Analyst" <joananalyst@uci.edu>

* Subject:
Thank you {ApplicantName}

Variables: Click on a variable to insert into the subject
[Applicant first name](#) [Applicant last name](#) [Applicant full name](#) [Completion date](#) [Recruitment name](#) [Username](#)

* Body:
Hello,
Thank you for taking the time to meet with us. The committee has determined that the position will be offered to another candidate.

4. The "From" line defaults to the logged-in user (the Analyst, Chair or Editor). If this line is edited, then the actual message received by the applicant will appear to come from that person.
5. To personalize the template, you may insert variables into the subject line or message body, for example: {ApplicantName}, {Username}, {ApplicantCompletedDate}, {RecruitmentName}, etc.
6. Click "Preview Email".

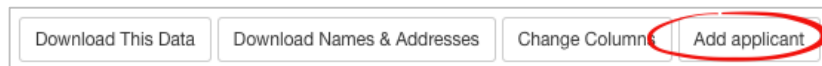
Click “Send Email” when ready. This action is immediately noted in the applicant’s log. A second log item notes when the message leaves the queue and is handed off to the campus email server.

7. In the rare case when an applicant’s email address is wrong, this will **not** be noted in the applicant’s log. The campus email server should be configured to deliver “failed” messages to the sender (analyst, chair, or editor) so they can correct the email address and attempt to contact the applicant once more.

Manually Add an Applicant

Occasionally Analysts may need to create an application on behalf of someone. For example, this may be useful for high-level searches, such as those for Deans.

1. Locate the recruitment’s list of applicants.
2. Click the button, **Add applicant** located on the horizontal bar at the top of the list.



3. Fill in the form: Applicant’s contact information, degree information, current employment, etc:

4. **Optional:** At the bottom of the form, check the box to send a notification to the applicant that an application has been established on their behalf. See *Appendix B, “Application is in the system.”*

5. Finally, click the button, **Add & Manage Now**.

Granting Access to the Applicant. This important action sends another email to the applicant that grants the applicant access with login and diversity survey instructions. See *Appendix B, “Access your application.”*

1. At the top of the applicant's screen, click the link, **Activate now**.

Notice: Applicant cannot access this application until it is activated – [Activate now](#)

2. Look over the applicant's information and click the button, **Activate applicant access**.

Manage Account Information
<p>Applicant Information</p> <p>Applicant: Paper Joe Mail In Recruitment: Assistant Professor of Dream Job</p>
<p>ApplicantID Information</p> <p>Notified that No application was added: Added on: Nov 03, 2011 at 5:55pm Received on: Nov 03, 2011 Activated: No</p> <p>Activating access will send the applicant an email with instructions on how to log in and manage their application. The email will be sent to paperjoe@somewhere.edu</p> <p>Activate applicant access</p>

Notifying the applicant that an application has been submitted in their behalf sends the login information and Survey instructions.

3. Before the email is sent, verify the email address for the applicant is correct.

Activate applicant access
<p>Send an email to Manually Added at another@bla.bla</p> <p>An incorrect email address could allow somebody else to access this person's application</p> <p>To the best of my knowledge, the email address another@bla.bla belongs to Manually Added</p> <p>Information is correct – Activate access Cancel</p>

Basic Qualifications

The first order of business is to differentiate applicants who meet the basic qualifications from those who don't. This reduces the time the committee spends on reviewing applications. This is also needed in order to produce accurate reporting that meets the requirements of the U.S. Department of Labor/ Office of Federal Contractor Compliance Programs (OFCCP).

IMPORTANT! Always use objective, non-comparative, relevant, and verifiable criteria. Contact UC San Diego's Office of Academic Diversity and Equal Opportunity for any help deciding which applicants meet or do not meet basic qualifications at adeo@ucsd.edu.

Entire Pool view: The entire pool tab, color-coded blue, lists all applicants. (Committee reviewers will see only completed applicants).

You may mark applicants from the Entire Pool view. Say, for example a PhD is a basic qualification. Look in the Highest Degree column, then...

1. Find a completed applicant (only completed applicants' qualifications can be judged).
2. Put a check in the empty box in the applicant's row.
3. You may select multiple names and click the master checkbox at the top of the row.

- Click **Meets**, **Unknown** or **Does Not Meet** to move the applicant to the appropriate category.

Basic Qualifications:

The *Entire Pool* view respects any filters the user has set. If you see unexpected results, then take a look at your filters and clear them if necessary. At the bottom of the list, you'll be reminded about any filters you may have set and you can clear them with the button, **Remove all Filters**.

Personal Note	Applicant	Highest Degree	Current Position	Status			
					Read	Unread	Hide
<input type="checkbox"/> Add	Johns, Wilbert ○○○ Manage Log Download	et esse Eius Ut Institute 2012-10-02 03:29:52	Alias College Ea Nemo	Not complete by applicant			
<input type="checkbox"/> Add	Grimes, Heber ○○○ Manage Log Download	PhD Enim School 2012-10-02 03:29:52	Enim College Quia Ut	Complete by Kim Gerrard May 13, 2015 4:49pm			
<input type="checkbox"/> Add	Burke, Winston ●●○ Manage Log Download	PhD Sit School 2012-10-02 03:29:52	University of Connecticut Corporis Debitis	Complete by applicant			

All applicants will be found on the Blue tab.

Unknown applicants view: As soon an applicant applies, Recruit places them in the **Unknown** category, color-coded **Orange**. The *Unknown* view respects any filters the user has set. If you see unexpected results, then take a look at your filters and clear them if necessary. At the bottom of the list, you'll be reminded about any filters you may have set and you can clear them with the button, **Remove all Filters**.

Personal Note	Applicant	Highest Degree	Current Position	Status	Last Updated	
						Read
<input type="checkbox"/> Add	Grimes, Heber ○○○ Manage Log Download	PhD Enim School 2012-10-02 03:29:52	Enim College Quia Ut	Complete by Kim Gerrard May 13, 2015 4:49pm	May 13, 2015	
<input type="checkbox"/> Add	Burke, Winston ●●○ Manage Log Download	PhD Sit School 2012-10-02 03:29:52	University of Connecticut Corporis Debitis	Complete by applicant	May 13, 2015	

Applicants who have not yet been marked appear on the Orange tab.

To mark applicants as Qualified or Unqualified from the Unknown view:

- Find a completed applicant (only completed applicants' qualifications can be judged).
- Put a check in the empty box in the applicant's row.
- You may select multiple names and click the master checkbox at the top of the row.
- Click the button at the top of the list of names **Meets** or **Does Not Meet** to move the applicant to the appropriate category.

Basic Qualifications:

Qualified applicants view: Applicants found in the Qualified/**Green** category are those who have been marked as meeting the basic qualifications. These applicants' diversity data will be used in the diversity analysis reports produced later.

Qualified		Read:	Visibility:	Basic Qualifications:		Disposition Reasons:			
		Read	Unread	Hide	Unhide	Unknown	Does Not Meet	Send Bulk Email	Assign Reasons
<input type="checkbox"/>	Personal Note	Applicant		Highest Degree	Current Position	Status	Last U		
<input type="checkbox"/>	Add	Thompson, Margaret		voluptas velit Maiores Research Division 2012-10-02 03:29:52	Perferendis School Est Ullam	Complete by applicant	Oct 28,		
<input type="checkbox"/>	Add	Simonis, Fay		sunt nam Nesciunt Institute 2012-10-02 03:29:52	Voluptatem Molestiae College Deleniti Cum	Complete by applicant	Oct 28,		
<input type="checkbox"/>	Add	Predovic, Sammie		vitae eligendi Est School 2012-10-02 03:29:52	Omnis Research Division Odit Voluptatem	Complete by applicant	Oct 28,		

Applicants marked "Meets" appear on the Green tab.

To move an applicant back to Unknown or to mark them as Unqualified:

1. Put a check in the empty box in the applicant's row.
2. Click "Unknown" or "Does Not Meet."

Basic Qualifications:

Note: You can revert a *Qualified* applicant back to *Unknown* if you discover required documents have been deleted from the application. If the required document is re-uploaded, the applicant will automatically move back to "Qualified."

Unqualified applicants view: The Unqualified/Grey category contains applicants who have been marked as "Does not meet basic qualifications."

Qualified		Read:	Visibility:	Basic Qualifications:		Disposition Reasons:			
		Read	Unread	Hide	Unhide	Meets	Unknown	Send Bulk Email	Assign Reasons
<input type="checkbox"/>	Personal Note	Applicant		Highest Degree	Current Position	Status	Last Upda		
<input type="checkbox"/>	Add	Stark, Jane		a incidunt Odio School 2012-10-02 03:29:52	Officis Dicta School Liberio Quas	Withdrawn by Kim Gerrard Oct 2, 2013 9:34am	Oct 2, 2013		

Applicants marked "Does Not Meet" appear on the grey tab.

To move an applicant back to Unknown or to mark them as Qualified:

1. Put a check in the empty box in the applicant's row.
2. Click **Meets** or **Unknown**.

Basic Qualifications:

What does the search committee see? Reviewers will have the same color-coded categories. They will see all applicants who are completed and categorized accordingly. However, reviewers will **not** have the ability to mark the applicants as Meets/Does Not Meet or move them to a different category.

Disposition Reasons

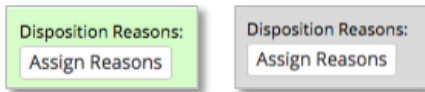
Disposition reasons are an important component of the final Search Report and reasons must be assigned to ALL applicants, both qualified and unqualified. Work with your search committee to help with disposition reasons.

To assign disposition reasons for **Qualified** applicants, click the tab marked Qualified. This displays all applicants that have been marked as "Meets basic qualifications." If no names appear, please return to

the help section, [Meets Basic Qualifications](#) and read the documentation for marking the qualified applicants.

To assign disposition reasons for **Unqualified** applicants, click the tab marked Unqualified. Disposition reasons for unqualified applicants will justify why those applicants did not meet the basic qualification and therefore, were not considered as viable candidates for the position.

Put a check in the boxes beside the applicant names that you want to mark disposition reasons for. Click the button "Assign Reasons" which appears at the top of both of these pools in the corresponding colored band.

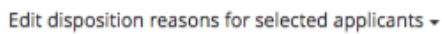


The assignment screen opens with your selection of names in a list.

Select Reason One-By-One: Place your cursor in the applicant's adjacent box and select a reason from a choice list. Multiple reasons are permitted. Use the comment field if needed. Reasons and comments are saved automatically. Click "Done" to return to the respective applicant pool.

 A screenshot of the "Assign Disposition Reasons" interface. At the top, it says "Applicants marked as Meets basic qualifications" and "1 applicant selected out of 3 applicants available". Below this is a table with columns: Applicant, Status, Disposition Reason(s), and Comment. The first row shows "Roberts, Isaac" with status "Complete" and a reason "Job talk showed some deficiencies". The second row shows "Treustel, Eleazar" with status "Complete" and a reason "Type the disposition reason to get started".

Select Reason in Bulk: For large pools, it may be faster to mark reasons (or comments) for multiple applicants at once. To do this, click this button at the top of the assignment screen:



Check the reason(s) from the selection list and click **Apply**. This time reasons will be applied to all applicants in your list at once. You may still edit individual applicant's reasons one-by-one.

 A screenshot of the "Assign Disposition Reasons" interface. At the top, it says "Applicants marked as Meets basic qualifications" and "4 applicants selected out of 101 applicants available". Below this is a table with columns: Applicant, Status, and Disposition Reason(s). The first row shows "Farrell, Brenda" with status "Complete". The second row shows "Fay, Emily" with status "Withdrawn after recommend for interview". The third row shows "Herzog, Adalberto" with status "Complete". The fourth row shows "Mead, Margaret" with status "Recommend for interview". To the right of the table is a list of reasons with checkboxes. The selected reasons are "B. As a result of Skype interview, not as strong..." and "Interview showed some deficiencies". At the bottom of the list are "Apply" and "Cancel" buttons.


Statuses and Short-listing



It is imperative that an applicant's status be kept up to date and is current. This ensures that the data is

accurate at any stage of the recruitment, which is critical for approvers of reports as well as ensuring the campus is accurately represented in systemwide reporting. Update statuses in real time, rather than wait to make the updates when a recruitment is near completion. Then, when a recruitment is near completion, a final candidate should be marked and identified in the recruitment as “Offered”, “Hired, or “Declined” as well as reasons for declining a recruitment offer.


Updating Applicants’ Statuses

1. From any applicant list (Qualified, Unqualified, or the Entire Pool view), click the link in the status column belonging to the applicant. **Note:** the Status column is on by default, but if it’s missing, add it with the “Change Columns” button.

For a definition of the status, roll your mouse over the help icon.  Then click directly on the status.

<input type="checkbox"/>	Add	kiku_maruda_17004	Maruda, Kiku  Manage Log Download	phd yale 1980	Complete  by Kim Gerrard Nov 3, 2015 2:36pm	Nov 3, 2015 2:36pm
--------------------------	-----	-------------------	---	---------------------	--	--------------------

2. Or, click the applicant’s name. The review screen reveals their current status. Click on the status.

Basic qualifications: Does Not Meet	Status: Complete 	Last updated: Oct 28, 2014 at 8:51 pm	Mark as Read
--	--	--	------------------------------

3. The Update status form opens. Make a selection and click **Update status**.

Update status for Kiku Maruda • Billion Dollar Professor (JPF00894) ✕

- Complete (current):** Required documentation has been submitted (or analyst has manually completed the applicant)
- Not complete:** Required documentation not yet submitted
- Serious consideration:** Applicant should be considered for the shortlist
- Recommend for interview:** Applicant recommended for interview
- Interviewed:** Applicant has been interviewed
- Proposed candidate:** Applicant recommended for appointment
- Offered:** Approvals have been obtained and a formal offer has been made to the applicant
- Accepted offer:** Approvals have been obtained and a formal offer has been accepted by the applicant
- Declined offer:** Approvals have been obtained and a formal offer has been declined by the applicant
- Hired:** Applicant entered in payroll system in searched title
- Withdrawn:** Applicant has withdrawn themselves from consideration

[Update status](#) [Cancel](#)

Note: Statuses are selectable only in a forward-moving progression. If a mistake has been made and you wish to roll back, contact a Recruit administrator to unlock the statuses.

Which status is considered “shortlisted?” The shortlist consists of all applicant statuses beyond Serious consideration. Those include: Recommend for interview, Interviewed, Proposed candidate, Offered, Accepted offer, Declined offer, Hired, Withdrawn, and Campus declined.

* Serious consideration is NOT a shortlist status.

Proposed Offers

When updating to **Offered**, **Accepted Offer**, or **Hired**, the proposed offer section expands:

Proposed offer

Appointment 1 ✖ Remove

*** Department**

Blah Department

*** Recruitment title**

1724: ASST PROF IN RES-HCOMP

Step **Percent time**

3 100 %

Anticipated start date **Starting salary**

Mar 1, 2016 \$ 105,000 .00

Discipline

Bark beetles

[+ Add another appointment](#)

- Unit name will auto-fill. But if the recruitment is cross-listed between units (departments, schools, etc) use the drop-down menu to select the correct unit to associate with the appointment.
- The title code will auto-fill. But if multiple title codes have been assigned to the recruitment, use the drop-down menu to select the title code to associate with the appointment.
- Fill in the other fields (Step, %time, Start date, Salary, Discipline).
- If offers have multiple appointments — for example 50% Full Professor of Physics / 50% Associate Professor of Statistics —then click the link, “Add another appointment.” And complete the section.

[+ Add another appointment](#)

When satisfied with the information entered, click **Update status**. The offer information is editable by returning to update the status.

Decline Reasons

Sometimes a shortlisted candidate backs out. When updating an applicant from Proposed Candidate, Offered, or Accepted Offer to **Declined** or **Withdrawn**, choose a reason from the list provided.

Reasons given for declining

Family Reason - Child Care/Elder Care

Family Reason - Spousal/Partner Career Opportunity

Cost of Living

Salary & Benefits

Professional Support

Other

Unknown

Manage the Applications

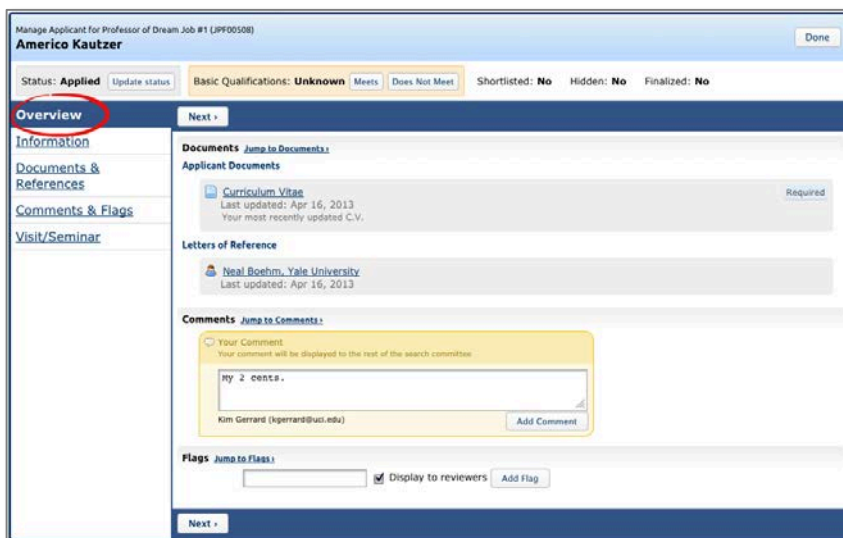
Analysts, chairs, and editors all have the ability to manage the applications although the analyst and editor generally do the tasks that are involved.

Click the **Manage** link below the name of each applicant:



Overview

Click “Manage” beneath an applicant’s name and the application’s Overview screen opens:



The Overview section includes:

- Applicant Documents.** Click the hyperlinked filename to download them to your computer.
- Letters of Reference.** Click the hyperlinked name of the reference to download their letter.
- Comments.** View, post, or update a comment to share with your search committee peers.
- Flags.** View, add, or update one or multiple flags and decide whether to display it to reviewers.

Information

View or update the applicant’s address, email, username, personal web site, employment, and degree information.

The Overview section also includes:

- Applicant Status.** Another way to edit the status or return to the offer proposal.

Manage Applicant for Professor of Dream Job #1 (LPP05058)

Americo Kautzer Done

Status: **Applied** Update status Basic Qualifications: **Unknown** Meets Does Not Meet Shortlisted: **No** Hidden: **No** Finalized: **No**

Overview Information Documents & References Comments & Flags Visit/Seminar

Applicant Status **Applied** Edit

Applicant Information Edit

Contact Information

Name: Americo Kautzer
 Email address: jalen@ernser.name
 Phone number:
 Mailing address: 881 Zoie Camp Wilmerhaven, Texas 39179-4217
 Web address:

Employment Information

Current affiliation: Laudantium School
 Current job title: Autem Culpa

Degree Information

Degree name: et numquam
 Degree institution: Ea College
 Date of degree: 2012-04-14 13:56:16
 PHD Advisor (1): Emmett Adams MD
 PHD Advisor (2): Mrs. Mckenna Gleason
 Dissertation Title: Quia distinctio recusandae illum et dolores in perspiciatis.

Documents & References

Manage the Applicant's Documents. Fully manage the applicant's required documents; **View**, **Upload** or **Delete** them if necessary. Documents may be uploaded as PDF files. Other valid file types include: zip, jpg, rar, tif, mov, bmp, 3gp, png, wmv, m4v, mp3, mp4, psd, swf, tiff.

Manage Applicant for Professor of Dream Job #1 (LPP05058)

Americo Kautzer Done

Status: **Applied** Update status Basic Qualifications: **Unknown** Meets Does Not Meet Shortlisted: **No** Hidden: **No** Finalized: **No**

Overview Information Documents & References Comments & Flags Visit/Seminar

Download PDF bundle Launch Document Viewer

Application Documents

Curriculum Vitae
 Required - Your most recently updated C.V.
 Delete file

Cover Letter
 Optional
 Upload

Statement of Research
 Optional
 Upload

Statement of Teaching
 Optional
 Upload

Misc / Additional
 Optional
 Upload

References & Letters

Add reference

Neal Boehm
 Letter not requested
 Associate Professor of History (Yale University)
 Reference comment:
[View details](#) [Download letter](#) [Remove letter](#) [Edit](#) [Delete](#)

Upload. Click the “Upload” link and navigate to the electronic file on your system. Or else, check the box “Document received outside of the UC Recruit application.” This will create a placeholder document with a notation that the actual physical document is housed outside of Recruit. A description field is provided to cue the committee that the material exists and where to physically locate it. This action will be logged and time-stamped.

Delete. Click the “Delete” link to permanently remove an applicant's document from their application. This action will be logged and time-stamped.

Manage the References & Letters

Recall when your recruitment was configured, references requirements were set to one of the following:

- **None** (the applicant is not required to provide references)
- **Only contact information** (the applicant is required to provide their reference's names, etc)
- **Letters of recommendation** (the applicant is required to provide references AND notify their references that a letter of recommendation is requested)

Department analysts, chairs, and editors have complete manage rights regarding references and the letters of recommendation per applicant. You may Add, Edit, or Delete a reference. You may **Upload** letters that arrive outside the system. You may Send a letter request to references if the requirements are "Contact Information Only" or "None". See *Appendix B: Notifications Sent to References (department-initiated)*.

Send a letter request to references in cases #1 and #2 outlined above.

1. First, add the reference using the **Add reference** button.
2. Next, click the link **Send letter request**.



3. The following email template opens. All fields are editable.



View the details of any reference and edit this information. This capability is possible in all 3 cases outlined above.

Reference Details

Name
Mai Colleague

Email
maicolleague@somecollege.edu

Affiliation
Chair

Phone number

Mailing address
**12345 Somewhere Blvd
Chicago, IL**

Delete a reference or a letter in any of the 3 cases outlined above. A confirmation/warning appears:

Are you sure you want to delete reference *Mai Colleague* for marian marian?

- This action cannot be undone.
- Any files associated with this reference will be deleted.

In recruitments with review dates (IRDs), deleting a required document (such as a CV or letter of reference) from a completed application will mark the applicant as Incomplete. Replacing the documents will move the applicant into the current search pool. This cannot be undone. See confirmation/warning below:

Are you sure you want to delete the *Curriculum Vitae* for David Lindgren?

- Deleting this file will make David Lindgren's application status incomplete.
- They will be removed from their review window.
- They will not be visible to the search committee even if you later replace the file.
- This action cannot be undone.

However... if the required document is deleted *after* the applicant is shortlisted, the applicant will *not* be marked as Incomplete, and they will remain in their original search pool.

Upload a letter into the applicant's file if the letter arrives outside of Recruit (via U.S. Post or via email) in any of the 3 cases outlined above. Please remember to thank the letter-writer and send a copy of the confidentiality statement, which you will find via a link on the upload screen.

Upload Reference Document

- Please upload a PDF or a supported media file type. [Learn more about supported file types](#)
- Don't forget!** Send a thank you email and a copy of the [confidentiality statement](#) to the reference after uploading their letter

Position: Professor of Magic Potions & Arts (OCF)

Applicant: Professor Snape

Reference: Margaret Hoodowser

File: no file selected

Optional Description:

Manage the Applicant's Comments & Flags

Manage Applicant for Super Best Job (Psych) (JPF00440) Done

Margaret Mead

Status: **Selected candidate** Update status Basic Qualifications: **Meets** Does Not Meet Unknown Hidden: **No** Completed: **Yes**

Overview < Back Next >

Information

Documents & References

Comments & Flags

Visit/Seminar

Flags
No flags have been defined.
Add flag: Shown to reviewers Add Flag

Comments
Your Comment
Your comment will be displayed to the rest of the search committee
 Add Comment

Flags. Flags are intended to be a unique set of labels applied to applicants to help categorize them. Enter a flag in the box provided and click **Add Flag**. Check the box if you wish to hide the flag from reviewers. You may edit or remove other's flags with the **Edit | Remove** links.

Comments. Comments are displayed to the entire search committee. They should be limited to those that are job-related, as all comments become part of the electronic record. Enter a comment in the box and click **Add Comment**.

Visit/Seminar

Schedule or edit applicant visits for viewing by the search committee. Add abstracts and biographies into the summaries. Optionally schedule additional events associated with the visit.

1. Click the link, "Schedule a visit/seminar" link.

Manage Applicant for Professor of Dream Job #1 (JPF00508) Done

Americo Kautzer

Status: **Completed** Update status Basic Qualifications: **Meets** Does Not Meet Unknown Shortlisted: **No** Hidden: **No** Finalized: **Yes**

Overview < Back Save & Done

Information

Documents & References

Comments & Flags

Visit/Seminar

No visit or seminar scheduled yet

- [Schedule a visit/seminar](#)

2. Add a title, summary, bio of the applicant, and the main event date in the form and click **Next**.

Schedule Visit or Seminar

Step 1: Information > Step 2: Schedule

Visit/Seminar Information

Title: *

Summary: *

Bio: *

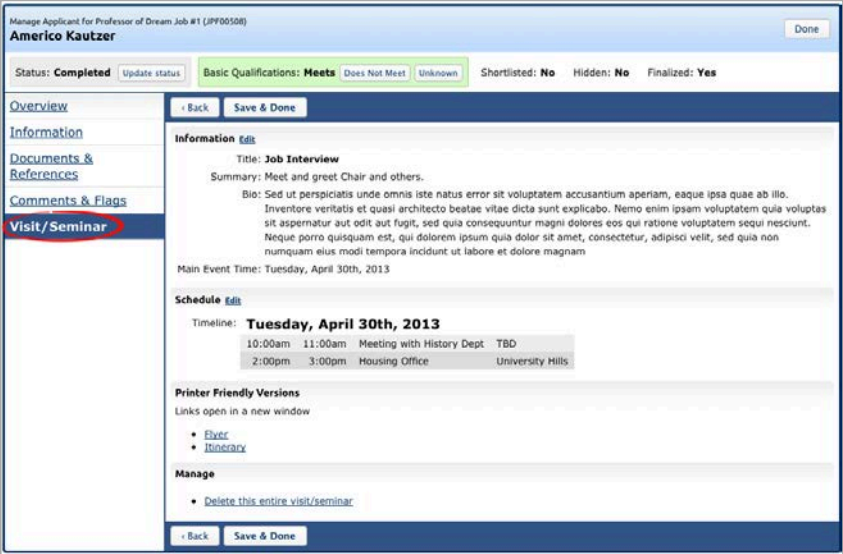
Main event date: *

Next > Cancel

3. Schedule any associated events that may occur during the visit/seminar and click **Save & Done**.



4. After saving, you are returned to the main Visit/Seminar screen. This is where you find links to a flyer and a formatted itinerary that you may print and distribute.



The completed visit/seminar information.

Part 3: Reporting

Applicant Pool and Shortlist Reports

Analysts may create two types of diversity analysis reports and solicit approvals by key people whom they will identify through a workflow list. Typically Department analysts create the reports and submit them for approvals. However, central campus Diversity Analysts, and campus Equity Advisors may also preview or even create reports for their own use. The central campus Diversity Analyst has the option to override the default dataset (based on title code/hiring type) to create a report using different availability data.

The Applicant Pool Report

The Applicant Pool report may be thought of as an interim report. It shows aggregated results from the diversity data collected from applicants who completed their applications, took the survey, and have been marked as “Meets Basic Qualifications.” Their responses are compared against national averages. This report is intended to be reviewed and approved before anyone is put on the shortlist.

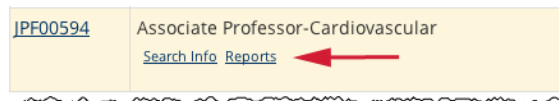
The Shortlist Report

The Shortlist Report shows the same results that are in the Applicant Pool Report **plus the aggregated diversity data for the short listed applicants**. Those who are designated as report approvers will have access to all information on this report.

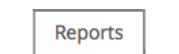
See samples of both the Applicant Pool Report and the Shortlist Report below.

Creating the Reports

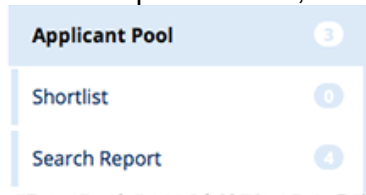
1. From the main Recruitment page, locate the recruitment and click the link, *Reports*.



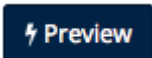
2. Or click the *Reports* tab from the Search Info screen or from the top of the list of applicants.



3. On the Reports screen, click the type of report you wish to create.



4. Click *Preview* to see the report before creating it. Make any changes necessary.



5. Click the button to create the report you need.

+ Create New Applicant Pool Report

+ Create New Shortlist Report

6. A summary appears. Click *Create Report* when ready.

Report Type. Drop down menu shows either Applicant Pool or Shortlist.

Applicant Pool Statistics. This region displays the number of *completed* applicants who have been marked as “Meets Basic Qualifications” and have submitted their survey on diversity. These survey-takers will be the only applicants in aggregated results, making this report in compliance with the US Department of Labor. If the count is zero, you must go back and mark the applicants who meet the basic qualifications. The count for shortlisted applicants is shown in this region too.

Note: For Basic recruitments (those that have not been configured for online application management), a field is provided for the Analyst to type in the number of applications received outside of Recruit:

7. A success message confirms the report has been created.

Success

New Report Successfully Generated.

8. Applicant Pool and Shortlist sections indicate the status of the reports.

- The “Date Generated” column keeps a running tally of all reports created throughout the search.
- The “Download” link opens a PDF of the report.
- Color-coded boxes indicate the status of the particular report’s approvals.

Academic Recruitment Analysis Report: Applicant Pool

JPF00573 -- Colossus Researcher
Report generated Feb 12, 2014 at 3:12pm

ABOUT THIS RECRUITMENT

Job number	JPF00573
Salary control #	477372
School	School of Rerum Impedit
Department	Department of Et Quidusdam
Availability data set	Tenured / SOE (1991 - 2005 Campus data; 2012 Health Sciences data; 2011 Law data; 1983 - 2002 ALA data)
Title code	1100: PROF-AY
Research area	Campus: Algebra
Recruitment period	Nov 8, 2013 - Nov 18, 2013

Search and Recruitment Efforts

Planned This is the section where we put in the search and recruitment efforts as planned.
Actual We worked hard and we contacted people at the job fair. This wasn't in our original plan because the solar eclipse of the moon wasn't visible 10 miles from the coast do to fog.

APPLICATIONS / RESPONSE RATE

Survey:	Taken	Not Taken	Total	Response Rate
Included in report				
Meets basic	215	0	215	100.0%
Not included in report				
Does not meet basic	1	0	1	100.0%
Unknown	1	0	1	100.0%

DIVERSITY BENCHMARK (AVAILABILITY) DATA

Specialty	Male	Female	African American	Hispanic	Asian	Native American	Minority Total*	White
Campus: Algebra	69.2%	30.8%	2.3%	2.5%	9.1%	0.3%	14.9%	85.1%

POOL COMPOSITION

Total Applicant Pool by Gender

Male	Female	Decline to State	Unknown	Total
58	62	95	0	215
48.3%	51.7%	n/a	n/a	% of respondents (215)
27.0%	28.8%	44.2%	0.0%	% of total pool

Total Applicant Pool by Race / Ethnicity

African American	Hispanic	Asian	Native American	Minority Total	White	Decline to State	Unknown	Total
43	35	38	31	147	27	41	0	215
24.7%	20.1%	21.8%	17.8%	84.5%	15.5%	n/a	n/a	% of respondents (215)
20.0%	16.3%	17.7%	14.4%	68.4%	12.6%	19.1%	0.0%	% of total pool

Report generated by UC Inline AP Recruit on Feb 12, 2014 at 3:12pm. All percentages rounded to the nearest tenth (e.g., 95.5545% -> 95.6%).
* The availability percentage for Minority Total includes multiple-race/ethnicity responses.

* The minority total column in the Diversity Benchmark section includes applicants who reported multiple race/ethnicity. That is a separate category in the data derived from The National Opinion Research Center (NORC). Those who selected multiple race/ethnicity are not included in the other individual race/ethnicity groups (not in AfAm, Hisp, Asian, NaAm), so the only place they are counted is in the minority total. Therefore:
Minority=AfAm+Hisp+NaAm+Mult.

**The average takes into account the number of individuals in each specialty, so a specialty with many individuals will have a bigger impact on the overall average than a specialty with fewer individuals.

Academic Recruitment Analysis Report: Shortlist

JPF00160 - Facilis Reprehenderit Quidusdam Recruitment - 2011 - 2012
Generated Jan 6, 2015 at 12:11pm

About This Recruitment

Job number	JPF00160
Salary control #	477372
School	School of Oceasab In
Department	Department of Laborisium Delictus
Availability data set	Tenured / SOE (1989 - 2003 Campus data; 2010 Health Sciences data; 2010 Law data)
Title code	1100: PROF-AY
Research area	Campus: Accounting
Recruitment period	May 24, 2012 - Jul 29, 2012

Search and Recruitment Efforts

Planned Not yet entered
Actual looking for things

Applications / Response Rate

Survey:	Taken	Not Taken	Total	Response Rate
Included in report				
Meets basic	17	0	17	100.0%
Not included in report				
Does not meet basic	2	0	2	100.0%
Qualifications are unknown	1	0	1	100.0%

Diversity Benchmark (Availability) Data

Specialty	Male	Female	African American	Hispanic	Asian	Native American	Minority Total*	White
Campus: Accounting	56.8%	43.1%	5.2%	2.2%	7.5%	0.4%	15.3%	84.2%

* The availability percentage for Minority Total includes multiple-race/ethnicity responses. The overall total may also contain additional small groups that do not have their own categories.

Pool Composition

Total Applicant Pool by Gender

Male	Female	Decline to State	Unknown	Total
8	2	7	0	17
80.0%	30.0%	n/a	n/a	% of respondents (21)
47.1%	11.8%	41.2%	0.0%	% of total pool

Total Applicant Pool by Race / Ethnicity

African American	Hispanic	Asian	Native American	Minority Total	White	Decline to State	Unknown	Total
8	3	3	2	11	5	1	0	17
14.8%	18.8%	18.8%	12.5%	60.0%	29.2%	n/a	n/a	% of respondents (21)
17.6%	17.6%	17.6%	11.8%	64.7%	29.4%	5.3%	0.0%	% of total pool

Seriously Considered Composition

Seriously Considered by Gender

Male	Female	Decline to State	Unknown	Total
5	1	0	0	6
83.3%	16.7%	n/a	n/a	% of respondents (6)
83.3%	16.7%	0.0%	0.0%	% of total seriously considered

Seriously Considered by Race/Ethnicity

African American	Hispanic	Asian	Native American	Minority Total	White	Decline to State	Unknown	Total
0	1	0	0	1	3	1	0	6
0.0%	33.3%	0.0%	0.0%	40.0%	66.6%	n/a	n/a	% of respondents (6)
0.0%	16.7%	0.0%	0.0%	33.3%	50.0%	16.7%	0.0%	% of total seriously considered

Short List Composition

Short List by Gender

Male	Female	Decline to State	Unknown	Total
5	1	0	0	6
83.3%	16.7%	n/a	n/a	% of respondents (6)
83.3%	16.7%	0.0%	0.0%	% of total seriously considered

Short List by Race/Ethnicity

African American	Hispanic	Asian	Native American	Minority Total	White	Decline to State	Unknown	Total
0	1	0	1	2	3	1	0	6
0.0%	33.3%	0.0%	33.3%	66.6%	66.6%	n/a	n/a	% of respondents (6)
0.0%	16.7%	0.0%	16.7%	33.3%	50.0%	16.7%	0.0%	% of total seriously considered

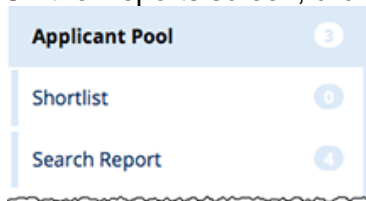
Short List

Name	Status
David, William	Accepted offer
Tom, Tom	Offered
David, Mike	Proposed candidate
David, William	Proposed candidate

Reports Approvals

Submit an APPLICANT POOL REPORT or SHORTLIST REPORT for review at different points of the search.

1. On the Reports screen, click Applicant Pool or Shortlist.



2. Find the report in the Date Generated column and click the link, "Submit as new approval." The following confirmation box opens:

 A confirmation dialog box with a title bar that says "Are you sure you want to submit this report for approval?". The main text reads: "This report will be submitted for a **new round** of approvals. Using workflow **"Applicant Pool Diversity-All"**, which includes the following steps:". Below this is a list of steps: "1. Committee Chair" with a note "You will be able to add steps after creation.". At the bottom, it says "If this is not the correct workflow, please contact [Support](#).". At the very bottom are two buttons: "Yes, submit for approval" and "Cancel".

3. There may be a system-assigned workflow containing a list of approver's roles in a progression. If you think this workflow is incorrect, stop here and report this using the *Support* contact link. Otherwise, click, **Yes, submit for approval**.
4. Make sure all roles are assigned names of people in those roles. If not, **specify a person**.
5. Add any additional steps or alternate approvers if needed.

If needed, use the Comments section to communicate with your approvers.

Automatic Approver Emails: At each step, Recruit sends email to approvers that their approval is needed and the submitter receives a copy.

- The email includes a direct link to the approval screen where approvers may download the report, comment, and approve.
- When Recruit detects an approval, the next in line is notified.
- After the last step approves, Recruit sends a notification to the submitter with next steps to take.
- Approvers may choose to opt out of email notifications.

Additional Email Notifications: Optionally use the "Notify Approvers" button for further communications along the workflow. For example, use this to: Prod the approver who's taking too long, warn the pending approvers about what's coming their way, or highlight a change that previous approvers might need to know about.

All emails include a direct link to the approval screen where approvers may download the report, comment, and approve. When the system detects an approval, the next in line will be notified. See Appendix A, *"How Approvers Use Recruit"* and Appendix B, *"Notifications Sent to Approvers."*

Updating Approvals

Scenario: The analyst has submitted a report for approval but an approver along the way finds a mistake. The analyst can correct any kind of report and pick up where it was left off in the workflow.

What updating the approval does:

- New approvers in the workflow will download the new, replaced report.
- A comment on the approval screen will be added to document the change. All original comments are retained too.
- Email notices inform previous approvers that the report they approved was updated. Previous approvers will not be required (or able) to re-approve.
 1. First, gather any documents and make all necessary changes to correct the report.
 2. On the Reports screen, click the Applicant Pool or Shortlist section.
 3. Click the corresponding button to create the new report. The new report will appear in the Date Generated column.
 4. To replace report already in transit with the corrected report, click the link “Update approval.”
 5. Choose the replacement report from the drop-down menu.
 6. Add a reason for the update.
 7. Click *Yes, update report*.

Are you sure you want to update the report being approved? ✕

Replace with:

Choose a new report

Jan 14, 2015 at 2:43pm 0.0%
1 applicant; 1 on shortlist

- Approvers will now download the new report
- A comment will be added in your name to note the change
- An email will be sent to those who have already approved so that they can verify the change

Please note the reason for the update:

This will be used in your comment and in the email to existing approvers.

Please select a replacement Cancel

Search Reports

Search Report Components:

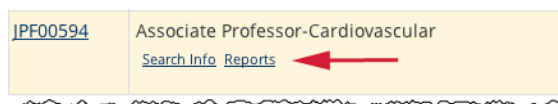
The following is a list of the components to be bundled into a Search Report. Much of this information

will have been input as part of the Search Plan. Be as thorough as possible to ensure approvals.

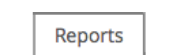
1. **The recruitment details:** General information including the recruitment name, department name, and recruitment period, etc will be automatically pulled into the Search report from the Plan.
2. **Search Outcome:** At a glance, this documents whether the search was successful, failed, or canceled. You will be prompted to complete the search outcome if you haven't already done so.
3. **Information about proposed candidates:** Salary control number assigned (senate positions), school/college, department, discipline/field (senate positions), anticipated start date, percent time, level of appointment (senate positions), title/rank/step (non-senate positions), salary (non-senate positions) and candidate's CV will be included in the report.
4. **Evidence of advertisements:** The list of all locations where the advertisement was published, posted, or distributed, as part of the search will be included in the report. This field is in the Advertisement section of the recruitment's Search Info. (For senate searches, provide verification of ad publication and payment in a national professional journal (online or in print)).
5. **Letters & Memos:** All letters/memos/written recommendations etc that have been uploaded into the Documents section of the recruitment's Search Info will be included in the report.
6. **Interview materials:** All interview documents or other notes from the interview process uploaded into the Documents section of the recruitment's Search Info will be included in the report.
7. **Actual Search and recruitment efforts:** What efforts were actually made to reach groups that are underutilized/underrepresented minorities, women, protected veterans, and individuals with disabilities? Committees may have added to their original plan during the search. This field is required information on all Search Reports.
8. **Applicant Disposition Reasons:** All applicants marked Qualified and Unqualified must have disposition reasons. Analysts will be prompted to enter this information before creating a Search Report.

Creating Search Reports

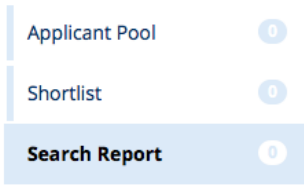
1. From the main Recruitment page, locate the recruitment and click the link, *Reports*.



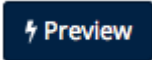
2. Or click the *Reports* tab from the Search Info screen or from the top of the list of applicants.



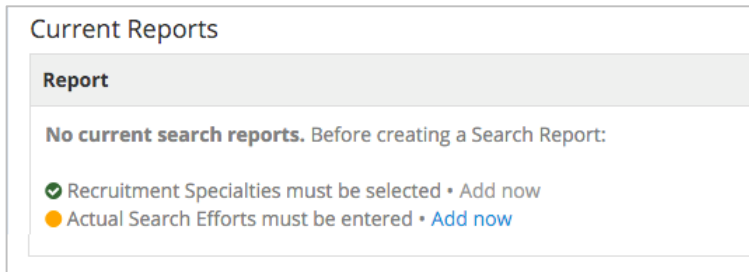
- Choose *Search Report* from the reports menu.



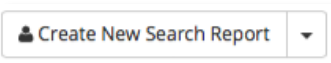
- Click *Preview* to see the report before creating it. Make any changes necessary.



- Before creating a Search Report, there must be recruitment specialties and actual search efforts.



- Click **Create New Search Report**.



- Title the report in the space provided.

Create New Search Report

Search reports contain summary information about the recruitment, including information about any applicants with the status "Selected Candidate" or later, including any files uploaded to the Documentation tab.

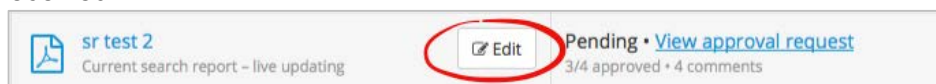
*** Name of report**

Create Search Report
[Cancel](#)

- Then click **Create Search Report**.

- Your new report will appear in your listing as the *Current Report*.

- Using the Edit button beside it, Analysts may rename Search reports up until the final approval is received.



Creating Search Reports for IRD Recruitments

Before creating a Search Report for recruitments with review dates (IRDs), there must be recruitment specialties, actual search efforts, and the initial review date must have already passed.

1. Choose the review date window you wish to appear in the report. If any applicants are missing disposition reasons, click on the link to return to the disposition status panel and assign as needed.

2. Then click **Create Search Report**.

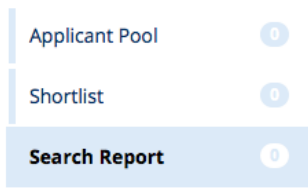
Search Report Approvals

To initially submit a Search report, follow the same instructions as for submitting Applicant Pool and Shortlist reports.

Live-Updating of Search Reports

Make any changes to the Search Report as necessary and all approvers will see those changes as soon as they happen.

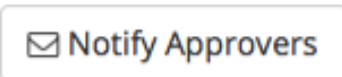
1. Update any of the components of the report as needed.
2. Then return to the Search Reports screen and choose *Search Report* from the reports menu.



3. Click *Preview*. The changes you've made will be evident.



4. Use the **Notify Approvers** button on the approval screen if you want to send an email about the change that previous approvers should know about.



Existing Report (Saved Search Reports)

Recruit stores all existing search reports in the "Saved Reports" section. The reports maintain their original content, approval status and list of signatures gathered. If you need to update a saved and previously-submitted search report, you can simply convert that search report to be live-updating, and any changes made will be reflected immediately.

1. Find the report in the "Saved Reports" section and click on *Update approval*.
2. The following dialog box opens:

Are you sure you want to update the report being approved? ✕

This report will become a **current report**, and will be live-updating.

The [report already submitted for approval \(2/2\)](#) as the Search Report will be **updated**; this will **continue** the existing round of approvals with the updated report.

- All comments and approvals will remain
- Approvers will now download the new report
- A comment will be added in your name to note the change
- An email will be sent to those who have already approved so that they can verify the change

Please note the reason for the update:

This will be used in your comment and in the email to existing approvers.

Yes, update report
Cancel

3. Type the reason for the update. The reason will become part of the electronic record found in the comments section on the approval screen.
4. And click *Yes, update report*.

- The report becomes the current report and will be converted to be live-updating. Approvers will now download the new report.
- An email will be sent to those who have already approved so that they can verify the change.

The End of the Search

Inactivate the Recruitment

The search is complete when a candidate has formally accepted the offer and the person is processed into the payroll system. At this point, analysts should “inactivate” the recruitment. This effectively hides the entire recruitment, applicant pool, comments, etc. from all reviewers. For security reasons, this end-of-search task is especially critical if your search committee was designated as All Department Faculty.

- Click **Recruitments** in the top menu bar and find the recruitment on the page.



- Click the link, “Make inactive”:

JP #	Name	Department	Submission Dates	Actions
JPF01603	ASST. PROFESSOR IN PHYSICAL CLIMATE Recruitment Details Diversity Reports Search Committee Applications (95)	Earth System Science	Open 9/19/2011 – 6/30/2012	Make Inactive

The Make Inactive link effectively archives the recruitment.

To Re-activate a Recruitment

If you need to see old recruitments, it is not difficult to bring them back.

- Using the filter panel, place a checkmark next to “Show Inactive” and click the Filter button.
- Now locate the recruitment in the list.
- Click the link, “Make Active” in the **Actions** column. This recruitment is available once again to manage as before and the intact applicant pool is visible to the reviewers.

Appendix A

How Applicants Use Recruit

- Browsing applicants locate the recruitment on Recruit's apply page <https://apol-recruit.ucsd.edu/apply> preferably they click the direct link to the job posting which is provided wherever the position is advertised.
- They create their ApplicantID (unique username and password).
- They fill in their contact information, highest degree information, current employment information, etc. After clicking "Create Account," they are brought to their Dashboard.
- They provide files and references. Documents must be uploaded as PDF files. Other valid file types include: zip, jpg, rar, tif, mov, bmp, 3gp, png, wmv, m4v, mp3, mp4, psd, swf, tiff.
- Applicants returning to modify their application will log in on the apply page with their username and password. Modifications may be made to an application up until the "final date." If applying to an IRD recruitment, the review date acts as their final modification date.
- Applicants who have forgotten their passwords may change it on the apply page by clicking the link in the login box, "Forgot your password?"
- Applicants may apply for multiple positions, however each position requires its own ApplicantID (unique username and password).
- "Contact Us" links appear in several locations before and after applicants are logged in. General and technical questions are sent automatically to acthelp@ucsd.edu. All others are sent to the recruiting department.
- Online Help docs are available to applicants both when they are logged in or not logged into their accounts.

The Applicant's Dashboard

Once all requirements are fulfilled, the application is completed and then becomes visible to the committee reviewers. The Application Status on the Dashboard displays "Submitted."

Recruit will send a confirmation email when the application is complete. *See Appendix B.*

The screenshot displays the UC Recruit Applicant Dashboard. At the top, there is a navigation bar with tabs for "My Dashboard" (selected), "My Information", "My Files", "My References", and "Diversity Survey". The main content area is divided into several sections:

- Application Status: Submitted**: A blue header box indicating the application is complete. Below it, it says "Awaiting 1 letter of reference" and includes a link: "• Want to apply to another position? See below."
- Recruitment Status**: A grey header box with details: "Last day to make changes was Friday, Mar 20, 2015 by 11:59pm (Pacific Time)" and "No further changes may be made to your application as it has been sent to the committee."
- Need Help?**: A grey header box with links for "Help documentation" and "Contact position support".
- Learn more about UCI**: A grey header box with links for "UCI Homepage", "Today@UCI - news and events", and "UCI employment information".
- Want to apply for another position?**: A section with instructions: "You must create a new, separate ApplicationID for each position you apply to:" followed by a numbered list:
 1. Logout from this position
 2. Click "Browse other recruitments or log back in" to see the list of open recruitments
 3. Locate the position to which you would like to apply and click the "Apply to this position" link
 4. Create a new account with a different user name for the new position
- Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act**: A section with a blue header and text explaining the act and providing a link for "Security Reports for each campus of the University are available on-line."

My Information. The applicant’s contact information, current employment information, highest degree information, and account information is editable by the applicant using the “Update” buttons.

The screenshot shows the 'My Information' dashboard with the following sections:

- Contact Information:** Name: Rhonda, Chase; Email: somewhere@fake.edu; Phone: 980-789-5676; Website: http://rhondachase.wordpress.com; Address: 1234 Street Way, Vida, CA 29798.
- Current Employment Information:** Affiliation/University: U of Minn; Title: Assistant Professor.
- Highest Degree Information:** Highest degree: Phd; Institution: U of Milan; Date obtained: 1999; PhD Advisors: Not provided; Dissertation: Not provided.
- Account Information:** Username: rhondachase (with 'Change username' link); Password: Not displayed (with 'Change password' link).

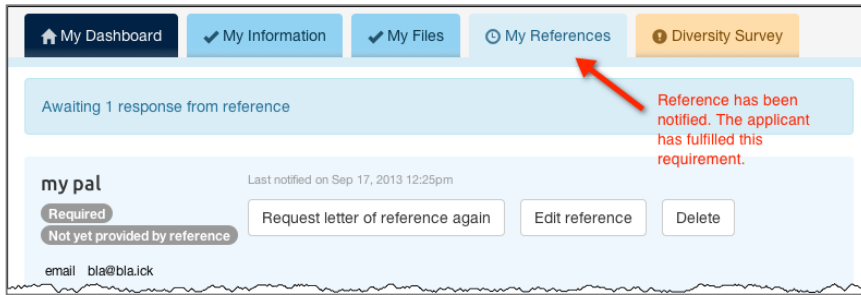
My Files. Applicants upload the necessary files using the “Upload Now” link. If an applicant needs to mail in documents via U.S. Postal mail, the “Show” link displays the department address.

The screenshot shows the 'My Files' dashboard with the following elements:

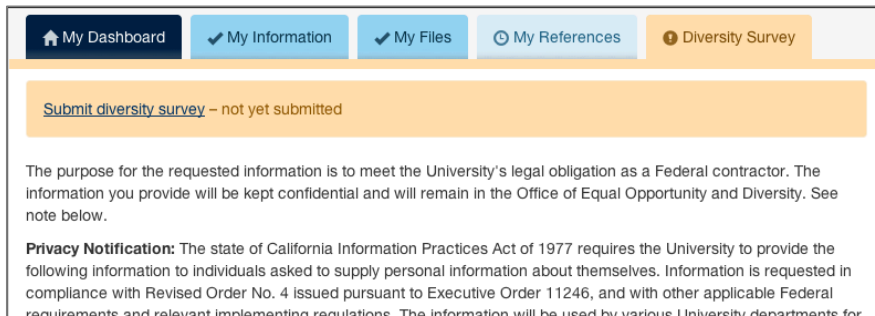
- A notification bar: "Please upload all required documents: 1 remaining".
- Curriculum Vitae:** Required document with an "Upload" button. Below it, text reads "Your most recently updated C.V.".
- Cover Letter:** Optional document with an "Upload" button.
- Statement of Research:** Optional document with an "Upload" button.
- Statement of Teaching:** Optional document with an "Upload" button.
- Misc / Additional:** Optional document with an "Upload" button.
- At the bottom, a link for "Alternate Submission Information" is circled in red, with a "Show" button next to it.

My References. When Contact Information Only is required, providing the reference’s name & information satisfies the requirement.

When letters are a requirement, the applicant will be expected to provide the contact information AND request the letter. A completed application is **not** contingent on the receipt of the letters. In other words, applicants have fulfilled the requirement for letters once they have requested them. Applicants may re-notify their references at any time, even after the recruitment is officially closed. Applicants can see when letters have been uploaded, but will not be able to view them.



Applicant’s Diversity Survey. Applicants read about the Diversity Survey and click the link, “Submit diversity survey” and complete the short survey. Applicants may submit their Diversity Survey at any time, even after the recruitment is officially closed.



Diversity Survey & Academic Applicant Data Request

Invitation to Self-Identify Demographic Information

The categories listed below are consistent with federal reporting requirements. A definition of the categories is linked to the values listed below. Please select the category that you most identify with, or for which you believe most people would identify you. Should you have questions about these categories, please do not hesitate to contact the Office of Equal Opportunity and Diversity; 103 Multipurpose Science & Technology, Irvine, CA 92697-1130; Phone: (949) 824-5594; Email: oead@uci.edu. The information you provide will be kept confidential and will remain in the Office of Equal Opportunity and Diversity.

Gender

- Male
- Female
- Decline to state

Ethnicity

- BLACK / AFRICAN AMERICAN (not of His**
A person having origins in any of the black r
- ASIAN or PACIFIC ISLANDER**
A person having origins in any of the original Philippine Islands, and Samoa. The Indian su
- AMERICAN INDIAN or ALASKAN NATIVE**
A person having origins in any of the original
- HISPANIC**
A person of Mexican, Puerto Rican, Cuban, C
- WHITE (not of Hispanic Origin)**
A person having origins in any of the original

How did you hear about the position?

- HERC - Higher Education Recruitment Consortium
- Inside Higher Education Website
- UCI Website
- Professional Organization
- Posted Announcement
- Chronicle of Higher Education
- Professional Journal / Bulletin
- Other
- Decline to state

Invitation to Self-Identify Veteran

The University of California is a Government contractor (VEVRAA), which requires Government contractors to take campaign badge veterans, (4) Armed Forces service mem

[View list of veteran classifications](#)

Do you believe you belong to any of the c

- Yes, I identify as one or more of the classific
- No, I am not a protected veteran
- I don't wish to answer

Voluntary Self-Identification of Disability Form CC-305 • OMB Control Number 1250-0005 • Expires 1/31/2017

Why are you being asked to complete this form?

Because we do business with the government, we must reach out to, hire, and provide equal opportunity to qualified people with disabilities. To help us measure how well you to tell us if you have a disability or if you ever had a disability. Completing this form is voluntary, but we hope that you will choose to fill it out. If you are applying for a j be kept private and will not be used against you in any way.

If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we are required to ask all of our emp information every five years. You may voluntarily self-identify as having a disability on this form without fear of any punishment because you did not identify as having a di

How do I know if I have a disability?

You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a histo impairment or medical condition.

Disabilities include, but are not limited to:

Blindness	Autism	Bipolar disorder	Post-traumatic stress disorder (PTSD)
Deafness	Cerebral palsy	Major depression	Obsessive compulsive disorder
Cancer	HIV/AIDS	Multiple sclerosis (MS)	Impairments requiring the use of a wheelchair
Diabetes	Schizophrenia	Missing limbs or partially missing limbs	Intellectual disability (previously called mental retardation)
Epilepsy	Muscular dystrophy		

Please check one of the boxes below:

- Yes, I have a disability (or previously had a disability)
- No, I don't have a disability
- I don't wish to answer

Reasonable Accommodation Notice

How References Use Recruit

As part of the application process, the Applicant initiates an email request to their references IF letters of recommendation are a requirement. The system sends the email along with instructions to the Reference to log into Recruit and upload a letter.

Uploading a letter of reference

1. References receive an email with the subject line, "UC San Diego Recruit: Letter of Reference Requested"
2. The Reference is instructed to log into Recruit one of two secure ways:
 - Using the Easy Login Link OR...
 - Using their email address with a token combination at <https://apol-recruit.ucsd.edu/reference>
3. After logging into the system, the University of California Confidentiality Statement is displayed on the screen. The Reference must check the box below it before they can proceed.

4. References will upload their letters or they may type them in. There is no editing capability but references may overwrite their previous letters by logging in as before and replacing their letters.

- References may upload one file.
- The files must be pdf's.
- The files must be less than 2MB in size.
- Letters are also accepted as plain text (without any formatting).
- A letter cannot be edited after submission, but References can provide a replacement.
- Applicants cannot view the letters in Recruit, but will be notified that they have been submitted.
- Recruit automatically sends a message thanking the Reference for their contribution. This email is editable by the Analyst when they are configuring the recruitment for online applicant management.

The Reference provides a letter of recommendation.

How Approvers Use Recruit

These instructions are for any faculty or staff who are named as approvers for a SEARCH PLAN, APPLICANT POOL REPORT, SHORTLIST REPORT, or a SEARCH REPORT. There are two quick ways to reach the approval screen:

1. Look for an email from Recruit, Subject: UC San Diego Recruit: Approval Request [name of recruitment].

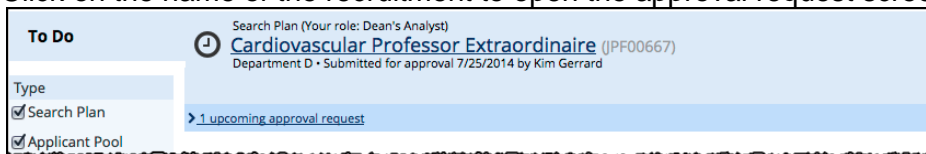
- For the exact wording, see Appendix B, “Notifications Sent to Approvers.”
- Approvers are prompted to log into Recruit with a direct link given in the email.
- The approval screen appears where the user will view, approve, or comment on the item.
- Approvers may opt-out of future notifications using the link in the email.

2. Or bypass the email and log into Recruit directly

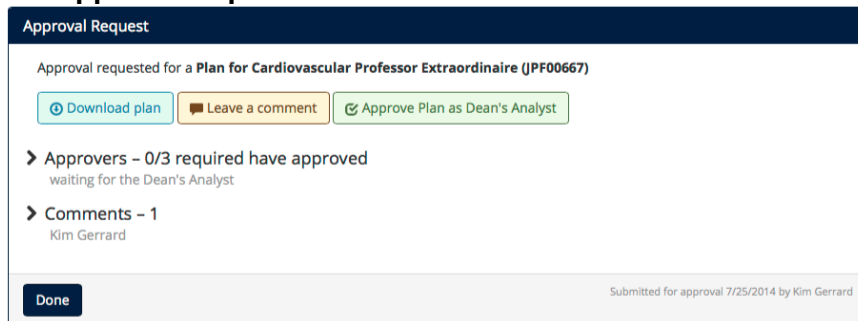
- Navigate to <https://apol-recruit.ucsd.edu/> and click “UC San Diego Faculty & Administrators.”
- Once logged in, the Home screen will display the link to any pending approvals:

 1 approval request is available for your review >

- The link opens a personalized “To Do” approval dashboard, filterable by the type of approval. Click on the name of the recruitment to open the approval request screen.

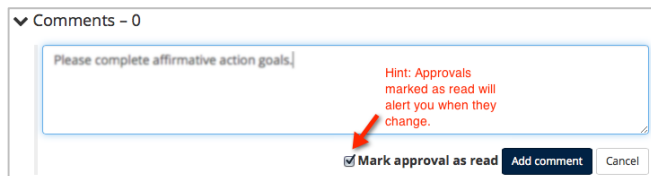


The approval request screen:



Download button: opens a PDF of the plan or report.

Leave a comment button: to leave a comment for the analyst and/or other approvers.



Approve button: to approve the plan.

> Approvers: displays the identities of any other approvers named in the workflow. The arrow indicates who is the next person in line to approve. Roll over the icons with your mouse to see the approval date and time.

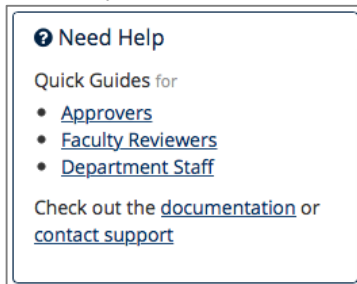
> Comments: expand the comments arrow to read comments left by others.

How Committee Reviewers Use Recruit

Committee reviewers log in using the UC Faculty & Administrators link on the RECRUIT homepage:



A Faculty Reviewer's Quick Guide is available for download in the sidebar on the **Home** page.



Recruitments leads to all those which the reviewer has been assigned access.



Reviewers may link to the approved search Plan and also to the applicant pool. The number in parenthesis is the total number of *completed* applications.

JPF02452	Associate or Full Professor - Computational Neuroscience Search Info Applicants (48)
--------------------------	---

Applicant Pools

Most of the same tools are available to Reviewers. See previous section, *Tools To Use With the Applicant List.*

For reviewers, the applicant pool opens to the green, *Qualified* view. This view represents all completed applicants who have been identified as meeting the basic qualifications. The analyst, editor and/or committee chair mark the qualified and unqualified applicants.

Assistant Professor of Dream Job My Recruitments

JPF00531 • Department booya / A School of Aliquid BC Contact: Marian Nedelchev

Search Info Applicants (5)

Download This Data Download Names & Addresses Change Columns Search

Qualified Read: Read Unread

Unknown	Personal Note	Applicant	Highest Degree	Current Position	Status
Unqualified	<input type="checkbox"/> Add	First, Hugo <small>Log Download</small>	phd Yale 2000	Yale Post Doc	Complete by applicant
Entire Pool	<input type="checkbox"/> Add	Hsieh, Kai <small>Log Download</small>	PhD UCB 1980	University of Colorado Assistant Professor	Proposed candidate by Kim Gerrard Dec 2, 2013 4:08pm
Status	<input type="checkbox"/> Add	O. Early, Amadeus <small>Log Download</small>	phd Yale 1980	Harvard Assistant Professor	Complete by Recruit System Nov 8, 2013 3:40pm
<input checked="" type="checkbox"/> Complete <input checked="" type="checkbox"/> Serious consideration <input checked="" type="checkbox"/> Proposed candidate	<input type="checkbox"/> Add	Payne-Diaz, Begonia <small>Log Download</small>	PhD UConn 2001	University of Southern Illinois Post Doc	Serious consideration by Kim Gerrard Dec 2, 2013 4:07pm

Review Window
June 12th, 2013
July 6th, 2013
August 6th, 2013
November 9th, 2013

Found 4 matches

To review individual applications, reviewers click on the name of an applicant in the list. The following view opens:

Jim Shorts
Prof extraordinaire, SIU Return to List of Applicants

Basic Qualifications: Unknown Status: Complete Last updated: Jan 20, 2015 at 3:03pm Mark as Read

Visit/Seminar: Tuesday, January 20th, 2015

Contact [Ace Analyst](#) with any questions about this visit/seminar

Title: Meet the candidate
Summary: Lorem ipsum fermentum aptent blandit sodosqu tempus pharetra eros venenati auctor vel conubia taciti portitor sollicitudin tempus amet viverra odio euismod urna felis curae.
Bio: Bibendum quam nostra augue scelerisque accumsan tenebia, nullam ut tellus egestas vehicula facilisis.

Tuesday, January 20th, 2015
10:00am–11:00am Kick off (909 Steinhaus Hall)

About

Degree: MFA at Yale (1990)
PHD Advisor: Professor Chase
Email address: jshorts@blah.bla
Website: <http://jimshorts.wordpress.com>
Phone #: 949-245-1234
Address: 12345 University Av
Carbondale, IL 63098

Documents

Curriculum Vitae
Cover Letter
Statement of Research

Letters of Reference 1-5 required
Holly Unlikely Letter requested but not yet uploaded

Review

Personal Note Not shared with the committee
Limit personal notes to those that are job-related. All personal notes become part of the search record and may be accessed through a public records request or during an audit.

Public Comments The entire committee sees these
Limit comments to those that are job-related. All comments become part of the search record and may be accessed through a public records request or during an audit.
Your Comment

 Mei Layos (mlayos@uc.edu)

Betty Committee Reviewer (ap-no-reply@recruit.ap.ucl.edu) Updated Jan 15, 2015 at 10:46am
 Betty thinks her comment is the best.

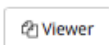
Charlie Committee Chair (ap-no-reply@recruit.ap.ucl.edu) Updated Jan 15, 2015 at 11:20am
 Charlie thinks his comment is the best.

Flags The entire committee sees these, unless they're hidden
 Analyst's hidden flag Andy's flag Edna's flag

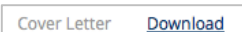
The Parts of the Application:

- 1. Visit/Seminar** —If a Visit/Seminar has been scheduled (by the analyst, editor or chair), the summary and schedule will appear at the top of the review screen.
- 2. About** —The applicant's employment, degree and other personal information is found in this section.
- 3. Documents** —This section contains the applicant's required or optional documents. There are THREE methods to reviewing the documents:

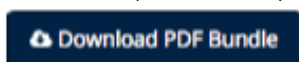
- **Viewer:** The Viewer button opens the applicant's documents within the browser frame. *Note: Browser versions and third party PDF readers may affect the use of the viewer.*



- **Download link:** Click on the hyperlinked filename to download the document to your computer. *Note: this method downloads potentially sensitive information to your machine. Use with care.*



- **Download PDF Bundle:** The Download PDF Bundle button appears in the Review section on the screen. *This is the recommended method to view all documents and letters.* Interstitial pages are placed in-between each document with the title and any other information about the document (if available).



4. Letters of Reference

- References' names and letters (if letters are a requirement) appear below the documents section.
- If the letter has been supplied, it is viewable via any of the three methods mentioned above.
- If the applicant has requested the letter, this will be indicated: "Letter requested but not yet uploaded".
- If the applicant has not yet requested a letter, this will be indicated: "Letter of Reference not yet requested".

5. Review/Personal Note —This feature is available to all reviewers and not viewable by other committee members. Notes should be limited to those that are job-related, as they become part of the electronic record.

6. Public Comments —Comments are displayed to the rest of the search committee. They should be limited to those that are job-related, as all comments become part of the electronic record.

- Comments are entered in the box provided and by clicking **Add Comment**.
- Owner's names and a time-stamp appear to others below the comment.
- One comment is permitted per applicant. You may return and add more text, but it is still considered one comment.
- Owners may remove their comment by clicking **Edit Comment** (and erasing it).
- There is no limit on the number of characters permitted in the comment field.

7. Flags —Flags are intended to be a unique set of labels applied to applicants to help categorize them.

- Flags are entered in the box provide and by clicking **Add Flag**.
- Owner's names will be displayed below your flag.
- Flags are by default, displayed to the rest of the search committee.
- Analysts, committee chairs, and editors may privatize their own flags and may privatize existing flags placed by others on a per applicant basis.

Appendix B

Notifications Sent to Applicants

1. The application has been started.

- ❖ Sent to applicants when they start their application.
- ❖ Will be suppressed if the analyst added the application.
- ❖ If IRD recruitment, includes a notation, "To ensure full consideration complete by [review date]."
- ❖ If IRD recruitment, includes a notation if application was submitted after the review date. See sample below.

Subject: UC Recruit: Application Started

Dear [applicant name],

Thank you for starting an application for [Recruitment name] at the University of California, XYZ.

<<< INSERTED FOR IRD RECRUITMENT >>>

To ensure full consideration, please complete your application by [review date].

<<<END OF TEXT FOR IRD RECRUITMENT>>>

=====

Your Application Details

=====

Your username: [username]

Login link: [[Link to applicant login](#)]

Recruitment Name: [recruitment name]

Department: [department name]

School: [school name]

<<< INSERTED FOR IRD RECRUITMENT if submitted after the review date has passed >>>

Note that at this time no additional review dates have been scheduled, so your application may or may not be considered by the search committee.

<<<END OF TEXT FOR IRD RECRUITMENT>>>

You may continue to modify your application until [Date]. After [Date], no further updates are allowed.

=====

Questions?

=====

If you have any questions about your online application or the process, please contact us.

[[Link to contact form](#)]

Thank you for your interest in the University of California, Irvine.

UC Recruit Team

University of California, XYZ

2. Thank you for completing your application.

- ❖ Sent to applicants a few hours after they complete their application.
- ❖ Will be suppressed if applicant was *manually completed* by the department.
- ❖ Includes any modification dates.
- ❖ If IRD recruitment, includes warning that modifying after a certain date could disqualify them from consideration.
- ❖ Includes a reminder to take the diversity survey if the system detects it has not been taken.

Subject: UC Recruit: Application Complete

Dear [applicant name],

<<<< INSERTED ONLY IF SURVEY HAS NOT BEEN SUBMITTED >>>>

Please complete a one-page survey to help us meet our obligation as a federal contractor.

[[Link to Diversity Survey](#)]

<<<< END OF TEXT FOR THE NON-SURVEY TAKERS >>>>

Thank you for successfully submitting your application!

=====
Application Details

=====
Position Name: Adolescent Psychology Assistant Professor

Department: Psychology & Social Behavior
School: School of Social Ecology

Username: [Applicant's username]

Status: Submitted

Login link: [[Link to applicant login](#)]

You may continue to modify your application until [Date].
After [Date], no further updates are allowed.

=====
Questions?

=====
If you have any questions about your online application or

the process, please contact us.

[[Link to contact form](#)]

UC Recruit Team

University of California, XYZ

3. **Thank you for completing your application and survey reminder.**

- ❖ Sent to all completed applicants who have not taken the survey.
- ❖ Sent 4-5 days before the recruitment's edit deadline (a final date or review date).

Subject: UC Recruit: Application Confirmation and Survey Request

Dear [applicant name],

We request that you complete the following survey by [Date].
This survey helps UC meet our obligation as a federal contractor.

[[Link to Diversity Survey](#)]

=====
Application Details

=====
Position Name: Associate Professor - Biochemistry

Department: Biochemistry
School: School of Biological Sciences

Username: [applicant's username]

Status: Submitted

Login link: [[Link to applicant login](#)]

You may continue to modify your application until [Date]. After
[Date], no further updates are allowed.

=====
Questions?

=====
If you have any questions about your online application or the

process, please contact us.

[[Link to contact form](#)]

UC Recruit Team

University of California, Irvine

4. **Deadline approaching – completion reminder.**

- ❖ Sent to all incomplete applicants ~3 days before the recruitment's edit deadline (a final date or review date).

Subject: UC Recruit: Application Completion Deadline Approaching

Dear [applicant name],

Thank you for starting an application for [position] at the University of California, XYZ.
To ensure full consideration, please complete your application by Sep 18, 2013

=====
Your Application Details
=====

Your username: [applicant's username]
Login link: [Link to applicant login]

Recruitment Name: [XYZ]
Department: [Pediatrics]
School: [School of Medicine]

=====
Questions?
=====

If you have any questions about your application or this recruitment, please contact us:

[Link to Contact form]

Thank you for your interest in the University of California, Irvine.

UC Recruit Team
University of California, XYZ

5. Application is in the system.

- ❖ Sent to applicants who were added by an analyst, provided the analyst asks for the system to notify the applicant.

Subject: UC Recruit: An application has been submitted on your behalf

Dear [applicant name],

An application has been established on your behalf for the position noted below and is on file at the University of California, Irvine.

Position Name: Assistant Professor - Atmospheric Chemistry
Department: Chemistry
School: School of Physical Sciences

--
[Analyst signature]
University of California, XYZ

6. Access your application

- ❖ Sent to applicants who were added by an analyst when the analyst activates the application to allow the applicant to log in.

Subject: UC XYZ Recruit: Access Your Application

Dear [applicant name],

The application that was created in your behalf is ready for your inspection and/or management.

Position Name: Assistant Professor - Atmospheric Chemistry
Department: Chemistry
School: School of Physical Sciences

To access your application, log on within 72 hours by using the following link:
[Link to log in]

This will direct you to a page displaying your ApplicantID (login name) with an opportunity to choose a confidential password. This link will expire in 72 hours.


```
--
[Analyst signature]
University of California, XYZ
```

7. Notification of a new, optional document request.

- ❖ Asks an applicant to log in and provide a document that was added after the recruitment opened
- ❖ Sent to all applicants, complete or incomplete.
- ❖ A date to provide the document is provided.

Subject: UC Recruit: Optional Document Requested

```
Dear [applicant name],

You are being sent this email because you applied to the following
position at the University of California, Irvine:

    Recruitment: Professor of Lorem Ipsum
    Department: Department D

Please note that the hiring department has requested that you provide a
new, optional document:
    [Optional document title]

You have until [Date] to provide this document. Log into your application
here:
    [Link to log in]

More information from the hiring department:
[Custom text provided by department when requesting new letter]

If you have any questions, please contact the hiring department directly:
    [Link to contact form]

Thank you for your interest in the University of California, Irvine.

--
[Analyst signature]
University of California, XYZ
```

8. Notify applicant of password reset

- ❖ Provides for an applicant who has forgotten their password to reset it.
- ❖ Initiated by applicant using “Forgot your password?” tool on the Apply page.

UC Irvine Recruit: Password Reset

```
Dear [applicant name],

You requested to reset your password for UC Irvine's Recruit system. Please visit the
following link in order to complete this task:

    [Link to reset/confirm password]

Note that this link will expire within 72 hours of your reset request.

Thank you for using Recruit.
--
[Link to Recruit apply page]
```

Notifications Sent to References

1. Request a letter of recommendation from the reference (applicant-initiated).

- ❖ Asks the reference to log in and submit a letter.
- ❖ Applicant can re-send request until the final date or review date.

Subject: UC Recruit: Letter of Reference Requested

Hello [Reference name],

[Applicant's name] is requesting a letter of reference from you for a position at the University of California, XYZ in the [Name of department].

Applicant Name: [Name of applicant]
 Applicant Email: [applicant's email]
 Applicant Notes: [Custom text provided by applicant]

Position Name: Adolescent Psychology Assistant Professor
 Department: Psychology and Social Behavior
 School: School of Social Ecology, UC Irvine

At your convenience, please consider providing this letter electronically by using the following information:

Easy Login Link:

[Link to direct upload after reading Confidentiality Statement]

If the Easy Login Link isn't working, try logging in with the following information:

URL: [[link to Recruit's reference login page](#)]
 Email: [the reference's email]
 Token: [unique-identifier-alpha-numeric string]

Please read the University of California's confidentiality policy regarding external letters of recommendation:

Although a candidate may request to see the contents of letters of evaluation in accordance with California law and University policy, your identity will be held in confidence. The material made available will exclude the letterhead, the signature block, and material below the signature block. Therefore, material that would identify you, particularly information about your relationship to the candidate, should be placed below the signature block. In any legal proceeding or other situation in which the source of confidential information is sought, the University does its utmost to protect the identity of such sources.

At your convenience, please consider submitting a letter of reference using the information above.

Thank you for your time,
 University of California, XYZ

2. Request a letter of recommendation from the reference (department-initiated).

- ❖ Asks the reference to log in and submit a letter.
- ❖ This ability is only available if the reference requirements are set to "Contact only."
- ❖ Department may re-send at any time.

Subject: UC Recruit: Letter of Reference Requested

Dear [Reference name],

You are invited to submit a letter of reference for [applicant name] for the position of [recruitment name] at the University of California, XYZ.

At your convenience, please consider providing this letter by emailing it to [department address].

Please read the University of California's confidentiality policy regarding external letters of recommendation:

Although a candidate may request to see the contents of letters of evaluation in accordance with California law and University policy, your identity will be held in confidence. The material made available will exclude the letterhead, the signature block, and material below the signature block. Therefore, material that would identify you, particularly information about your relationship to the candidate, should be placed below the signature block. In any legal proceeding or other situation in which the source of confidential information is sought, the University does its utmost to protect the identity of such sources.

Thank you for your time.

[Analyst signature]
University of California, XYZ

3. Reference thank you.

- ❖ Thanks the reference for providing a letter.
- ❖ Initiated by the reference's upload action.
- ❖ Informs reference that the letter will become part of the applicant's appointment file if an offer of employment is extended.

Subject: UC Recruit: Thank you for your contribution

Dear [Reference name],

Thank you for submitting a letter of recommendation. Your letter is now available on-line for viewing by the faculty search committee.

We would like to include your letter in the appointment file when an offer of employment is extended. If you have any concerns about this, please contact [analyst's name and email].

[Analyst signature]
University of California, Campus XYZ

Notifications Sent to Approvers

Approver's notification.

- ❖ Approvers who are next in line in the workflow receive the email.
- ❖ If a step is approved before it is the current step, the email is suppressed.
- ❖ Approvers are never emailed twice for the same request.
- ❖ If there are multiple people listed in a step (alternates), all receive the email simultaneously.
- ❖ The email template for optional approvers have slightly different wording: "Your approval is *requested* instead of *required*."
- ❖ When a current step is approved and if the next step is marked as optional, all potential approvers for the next mandatory step are sent the email.
- ❖ Submitters of the item (Plan, reports, etc) receive a 'cc of these emails.

Subject: UC Recruit: Approval Request: [Associate Professor of Chemistry [JPF00123]

Hello [Approver name],

Your approval is required for:
Recruitment name: Associate Professor of Chemistry (JPF00123)
Approval request for: Applicant Pool Report
Your role: Committee Chair

To view, approve, or comment on this request please visit:
[Link to approval screen]

If you have any questions, please contact the user who requested the approval:

[Analyst's name, email]

To change how you are notified about approvals, click here:
[Link to change notifications]

Approver's notification – Updated Reports

- ❖ Approvers who have previously approved an Applicant Pool, Shortlist, or Search report are sent an email if the report has been updated.
- ❖ The notification is an FYI and not a request for a re-approval.

Subject: UC Recruit: Approval Update: [Associate Professor of Chemistry [JPF00123]

Hello [Approver name],

A document you have approved has been updated.
 Recruitment name: Associate Professor of Chemistry (JPF00123)
 Approval request for: Search Report
 Your role: Equity Advisor
 You approved: 9/3/2014 at 12:27pm

The reason for the update is because we hadn't marked the disposition reasons for the unqualified applicants.

Your approval still stands. However, if you wish to view or comment on the changes, please visit:

[[Link to approval screen](#)]

If you have any questions, please contact the user who requested the approval:

[Analyst's name, email]

To change how you are notified about approvals, click here:

[[Link to change notifications](#)]

Notifications Sent to Analysts

Notification of approver's comment

- ❖ Email is sent to the submitter of the item (Plan, reports, etc.) when an approver leaves a comment.

Subject: UC Recruit: Approval Comment: [Associate Professor of Chemistry [JPF00123]

Hello,

John Faculty left a comment on the following approval:

Recruitment name: Associate Professor of Chemistry (JPF00123)
 Approval request for: Search Plan

Please be more specific about your planned search recruitment efforts.

To view or comment on this approval, please visit:

[[Link to approval screen for this recruitment search plan](#)]

Message generated by UC Recruit

To change how you are notified about approvals, click here:

[[Link to change notifications](#)]

Notification of completed approvals

- ❖ Email is sent to the submitter of the item (Plan, reports, etc.) when all required approvers have signed off.
- ❖ Email also informs recipient of the next steps to take.

Subject: UC Recruit: Approval Complete: [Associate Professor of Chemistry [JPF00123]

Hello,

Your request for approval is complete!

Recruitment name: Associate Professor of Chemistry (JPF00123)
 Approval request for: Search Plan

To view this request, please visit:

[[Link to approval screen](#)]

Your next steps:

- *Publish the recruitment so that applicants can start applying.
- *Monitor incoming applications and mark each as meets basic qualifications or does not meet basic qualifications.
- *Assign disposition reasons to applicants who do not meet basic qualifications.
- *Submit the applicant pool report for review and approval by the search committee chair at least one week before the close date to assess if additional outreach is

needed before closing the recruitment.
 --
 Message generated by UC Recruit
 To change how you are notified about approvals, click here:
[\[Link to change notifications\]](#)

Applicant Pool Report Needed

- ❖ Email is sent to the creator of the recruitment and the person who configured it for online. Often this is the same person, otherwise known as the analyst in charge of the recruitment.
- ❖ The date the reminder is sent and the wording of the message differs from campus to campus. The following is the message sent at UC Irvine:

Subject: UC Recruit: Applicant Pool Report Needed : [Super Best Job [JPF00673]

Hello [Analyst Name],

Super Best Job (JPF00673) is about to close. On Nov 17th, 2015- just 8 days from now- no new applicants will be allowed to apply..

That means that it is time to submit an applicant pool report. This report will be shared with your search committee chair or PI to determine if you have a good pool of applicants to begin reviewing, or if you should do further outreach to increase the number of applicants and the diversity of the pool.

To submit a report:

- * Go to [\[Link to Applicant Pool reports screen\]](#)
- * Click "Create New Applicant Pool Report" and fill out the form
- * Click "Create"
- * Your new report will appear in the list, timestamped with today's date
- * Click "Submit as new approval" on your new approval
- * Verify that the approvers listed are the ones you expect
- * Click "Yes, submit for approval"
- * Fill in the names of any approvers that need to be specified

The first approver will be notified shortly. Return to the approval page often to make sure no one has any trouble.
 You will be notified when each signature is attained and when the approval is complete.

Supporting Recruit's End-Users

Recruit technical supporters (those with Administrator access) will see inquiries with these subject lines:

- Subject: UC Recruit: Question (Technical)
- Subject: UC Recruit: Question (General)
- Subject: UC Recruit: *Reference* Question (General)
- Subject: Recruit: Contact Us

Analysts will see inquiries sent to their department. The subject line displays the name of the recruitment. Administrators will receive a copy of these messages but they are intended for the department to respond to. Example:

<p>From kasprov@ucirvine.edu Subject [Recruit] UC Irvine Recruit: Applicant Question for Assistant Professor - Ballet To kasprov@ucirvine.edu</p>	<p>Note: Always check the footer of the email you receive. The system provides time-stamps and other helpful sender information for supporters to address the email.</p>
--	---

There are numerous locations where an applicant can find the “Contact Us” link (in the footer, on the top of help pages, etc). One point of contact is beneath the recruitment name on the Apply page, where a person who is not logged in can send a question (Figures A-D).

The screenshot shows a 'Contact Us' form with the following fields and options:

- My name:** Input field containing 'Joan Applicant'.
- My email:** Input field containing 'joanapplicant@kasprovw.edu'.
- Recruitment:** Dropdown menu showing 'MN Recruitment Test'.
- My Question:** Radio button options: 'Recruitment-specific' (circled in red), 'Technical Support', 'General Question', and 'Missing Recruitment?'.
- Text below options: 'Your question or comment will be sent to technical support or the administrator for the recruitment.'
- Note: 'Please provide the recruitment/department/school information for faster assistance.'
- Text area containing: 'I am interested in your position but notice that it is closing tomorrow. I am just getting my materials ready today and was wondering if you could accept them late.'

Figure A: The “Contact Us” form to use with a question directed to the department. (person is not logged in)

The screenshot shows the same 'Contact Us' form as Figure A, but with the following differences:

- My Question:** Radio button options: 'Recruitment-specific', 'Technical Support' (circled in red), 'General Question', and 'Missing Recruitment?'.
- Text below options: 'Your question or comment will be sent to technical support or the administrator for the recruitment.'
- Note: 'Please provide the recruitment/department/school information for faster assistance.'
- Text area containing: 'I intend to apply to the position Super Best Job. After I apply will I be able to return and update my application?'

Figure B: The “Contact Us” form to use with a technical question. (person is not logged in)

The screenshot shows the 'Contact Us' form with the following fields and options:

- My name:** Joan Applicant
- My email:** joanapplicant@kasprovw.edu
- Recruitment:** MN Recruitment Test
- My Question:** Recruitment-specific, Technical Support, **General Question** (circled in red), Missing Recruitment?

Below the question selection, there is a text box for the question and a note: "Note: Please provide the recruitment/department/school information for faster assistance." At the bottom, there is a checkbox for "Am I going to need references?"

Figure C: The "Contact Us" form to use with a question that is general. The technical staff will receive this. (person is not logged in)

The screenshot shows the 'Contact Us' form with the following fields and options:

- My name:** Joan Applicant
- My email:** joanapplicant@kasprovw.edu
- Recruitment:** MN Recruitment Test
- My Question:** Recruitment-specific, Technical Support, General Question, **Missing Recruitment?** (circled in red)

Below the question selection, there is a section titled "If the recruitment you are looking for is not shown:" with two bullet points: "Contact the hiring department directly for assistance." and "Contact email and phone number is usually stated in the advertisement for the recruitment." Below that is a section titled "Reasons a recruitment may not be shown:" with two bullet points: "It is possible that applications are being accepted in a different form other than through this website." and "The open application period may have lapsed." At the bottom, there are "Send" and "Cancel" buttons.

Figure D: Applicants who cannot locate a position on the Apply page are given instructions to contact the department for assistance.

The screenshot shows the 'Contact Us' form with the following fields and options:

- Text: "Please see our Common Questions (below) for quick assistance"
- From / Reply To:** kgerrard@gmail.com
- I Need Help With:** A dropdown menu with the following options: "Application/References for IRD Future" (checked), "General Question (eg. other positions, UCI)", and "Technical Support (eg. upload problems)".

Below the dropdown menu, there is a text box for the question. Below that, there is a note: "Your question or comment will be sent to Recruit support or the administrator for the position." and "A copy of this message and a reply (if necessary) will be sent to kgerrard@gmail.com." Below that is a section titled "Common Questions" with two sub-sections: "How do I request a letter of reference from one of my references?" and "I use a dossier service for references. How do I submit my letters?"

Figure E Mail is routed to the proper person when the applicant chooses from the drop-down menu. (person is logged in)

Appendix C

Special Tools for Recruit Administrators

1. Click **Admin** in the top menu bar:



2. The list of available administrative tools depends on your role/access rights:

Support Tools	Campus Settings	Site Settings
<p> Find Applicants Browse and filter all applicants</p> <p> Find References Browse and filter all references</p> <p> Find Approvals Browse and filter all approvals</p> <p> Proxy as User Assume the identity of a user</p> <p> Create Fake Recruitment Create a fake recruitment for training or other purpose</p> <p> Diversity Benchmark / Availability Data View availability data for 2014 - 2015</p>	<p> Manage Front Page News Create and edit front page news items</p> <p> Manage User Roles Edit, assign and remove user roles</p> <p> Manage Academic Unit Hierarchy Create and rename academic units</p>	<p> Approval Workflows Configure default approver lists</p> <p> Permission Options Configure what permissions roles have</p> <p> Features See which features are enabled on this site</p> <p> Redis Info See statistics on the Redis server backing this site</p>

Menu shows administrative tools that are available, depending on user's role.

Find Applicants: Search for applicants, past or present, in Recruit.

Find Applicants

Change Columns Search

Originated	Applicant	Analyst added?	Username	Email
<input checked="" type="checkbox"/> Added by analyst <input checked="" type="checkbox"/> Not added by analyst Filter Reset	Nam Nooba Physics Professor			
	Okuneva, Zion Manage	No	rylee1	lea@champlin.biz

Found 1 match in search for "Zion"

Find References: Search the Reference logs. This information is used to determine if:

- The token has been input incorrectly.
- The letter has not yet been requested.
- The applicant has revoked the request for a letter.
- The applicant has deleted the referee.

Find References

Please do not distribute the tokens to references—they are provided here for help troubleshooting reference login and upload issues. If a reference needs their token, ask the applicant to notify them again or upload the letter on behalf of the reference.

Change Columns Download as CSV Search

Reference	Email	Token	Applicant	JP #	Token Status
Ruben Ernser I	mackenzie.haag@kuvalis.net	1bcf1cb02207af992db9127cd6047281	Winston Burke	JPF00160	Active (Letter uploaded)

Found 1 match in search for "Ernser"

Note: Please do not distribute the tokens to references—they are provided here for help troubleshooting reference login and upload issues. If a reference needs their token, ask the applicant to notify them again or upload the letter on behalf of the reference.

Proxy as User: Assume the role of any user in Recruit.

Create Fake Recruitment: This tool makes it easy to quickly create a published recruitment for training purposes. It is only available on the *training* site. The tool automatically assigns recruitment dates, title codes, specialties, documents/letter requirements as well as generating a list of applicants in various states of completion. *Recruit Administrator* or *Trainer* access is required for this activity.

1. Log into your campus Recruit training site. The tool is not available on the live, production site.
2. When prompted, give your fake recruitment a name and choose a department.

This admin tool may be used when training Analysts to use Recruit.

Diversity Benchmark/Availability Data

Find complete, numeric diversity benchmark data for the current year. When analysts create a new recruitment, they select one or more specialties and enter title codes. This raw data is used in the Applicant Pool and Shortlist reports to display availability percentages that most closely match the specialty and title.

Manage Home Page News: Use this tool to write, edit, publish, and archive news items on the Home page that users will see after they log in. These posts are visible to all users except applicants and references. Post training dates, planned downtimes, holiday support notices, application enhancements, special instructions, or other announcements.

Front Page News Manager

Create News Item

Active News

Subject	Published Date	Content	Creator
We Cleaned House! Edit Archive	2013-06-11	This Recruit training/demo site has been recently refreshed and reset. All recruitments that...	Kimberly Ann Gerrard
What's New in Recruit Edit Archive	2013-06-10	For all the news on Recruit's updates and enhancements, visit our blog at http://sites.uci.edu/ap...	Kimberly Ann Gerrard

Found 2 matches

Archived News

Subject	Published Date	Content	Creator
Testing Edit Unarchive	2013-08-09	testing	Kimberly Ann Gerrard

This admin tool's interface shows current and archived news posts along with a "Create New Item" button.

Manage User Roles: This tool manages Recruit users and their roles.

All faculty and employees (including student employees) will have access to Recruit because they are part of a nightly data feed, but they do not have the ability to do or see anything in Recruit until they have been given a role. This tool enables you assign roles, edit existing roles, and remove user access. *Recruit Administrator* or *Recruit User Manager* access is required for this activity.

The following example assigns the School Analyst role. A School Analyst has all the access rights of the Department Analysts within his/her school.

In the Manage User Roles admin tool...

1. Click the button, "Add Role for User."

Add Role for User

2. Search for the person by name, email or UC San Diego AD.
3. Select a user role from the drop down menu.
4. Choose a resource type from the drop down menu.

Note: Most of the time, select either Department or School. Committee roles will be assigned by the Analyst as part of the search Plan. Choose "Tool" when assigning roles across the system.

5. Click "Save" when finished.
6. Type their name and click "Find" to confirm that the user is in the alphabetical listing.

Manage User Roles

View by users View by roles

Add Role for User Search by name, email, or UCInetID Find

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Full Name	UCInetID	Role	Unit/Resource	Resource Type
Bababeygy, Simon R Edit Remove Proxy	SBABABEY	Other Professor	Ophthalmology	Department
Babalan, Kara N	KRABALAN	Other Professor	Urology	Department

Locate users by their sign-in name on the "View by users" tab.

Manage User Roles

View by users View by roles

Central AP Analyst Diversity Analyst Equity Advisor Global Administrator **Recruit Administrator** Recruit Analyst Recruit Analyst (No Reports) Recruit User Recruit User Manager

Full Name	UCInetID	Role	Unit/Resource	Resource Type
Chin, Jean Ling Edit Remove Proxy	JLCHIN	Recruit Administrator	recruit	Tool

Locate users by their roles.

Manage Users:

NOTE TO OTHER CAMPUSES USING RECRUIT: This tool is only available if Recruit is configured on your campus for local authentication. Under Shibboleth, Recruit expects to be fed user directory data so this tool would be unavailable in order to prevent overwriting data.

Manage User Accounts					
Create User Account					
Use the Manage User Roles admin tool to manage roles for these users					
Name	User Name	Email	Department	Last Modified	Actions
Berkeley2, Academic Personnel	APUCB	oasii@berkeley.edu	Department for Berkeley	Oct 17, 2011 12:26PM	Edit Delete
BLACK, Gwendolyn Kuhns	gkuhns	gwen.black@uci.edu	Department for UCI	Oct 06, 2011 12:44PM	Edit Delete
Chin, Jean Ling	jlchin	jean.chin@uci.edu	Department for UCI	Oct 06, 2011 12:44PM	Edit Delete
Committee Chair, Charlie	ccchair	keppard@uci.edu	Department for UCI	Oct 06, 2011	Edit Delete

Create, edit, and delete user accounts when Recruit is configured for Local Auth.

Manage Academic Unit Hierarchy: Sometimes academic units change their names or new units must be added. **Warning:** Nightly data feeds could overwrite your manual entries so work with a programmer if you have concerns before you use this tool. In some cases, data feeds must be adjusted, or they will overwrite any changes made.

Manage Academic Unit Hierarchy

MN School(AA)
Edit

Departments Add

- Blah Department Edit Delete
- Dean's Office - MN School Edit Delete
- Department of Ahh Edit Delete
- Wonder Department Edit Delete

Adding a New Department:

- Find the school listed on the page and click the link, "Add Department".
- Name the department.
- Provide a unique identifier. This is typically the payroll home department code.
- Click "Add".
- Use the "Edit" link to change this information.

Deleting a Department:

- Scroll to the department and click the button, "Delete."
- Confirm the deletion.
- Departments with active recruitments or user roles can't be deleted unless these are assigned to different units first. Hover over the "Delete" button to view total number of recruitments and associated user roles.

Adding a New School:

- Scroll to the bottom of the page and click "Add another school..."
- Name the school.
- Provide an abbreviation. This arranges the sorting of schools on the Apply page.
- Provide an identifier (any string of up to 32 characters).
- Click "Add".

- Use the “Edit School” link to change this information at any time.

Deleting a School:

This tool offers no way to delete schools. Contact Recruit support.

Approval Workflows: Recruit administrators may design approval workflows for search plans and reports based on best business processes. The workflows will then be shown to analysts to ensure approval processes remain consistent and compliant.

1. Click Create New Approval Workflow.



2. Give the workflow a descriptive name. This name is shown to analysts before they create the approval submit section.

* Name

Search Plan and Advertisement (Regular Ranks Faculty FTE Position)

3. Use the drop-down selector and choose a context: Search Plan, Applicant Pool Report , Shortlist Report, or Search Report. Select "All" to have a catchall workflow when the other workflows you've designed won't fit for whatever reason.

Context

Search Plan

4. Choose to apply this workflow to specific schools or choose All Schools to apply globally.

Schools

All schools

Only in school

5. For even more granularity, choose condition based on Title Codes.

Title Codes

All title codes

Only certain title codes

6. Choose the recruitment type: Only Senate, Only non-Senate, or Both Senate and non-Senate.

Recruitment Type

Both Senate and non-Senate

Only Senate

Only non-Senate

7. Click the link on the right side of the screen, "Add step."



8. ...and choose the role from the drop-down selector. When you uncheck the "required" box, it makes a step optional.

9. Click "Add Step" when finished adding the steps. The workflow will be applied to all future approval requests that meet this criteria.

Editing an Approval Workflow: Edits will not change any approval workflow that is currently in use.

1. Click "Edit" below the workflow name.
2. Make changes to the context and conditions.
3. Steps may added or deleted.
4. Reorder steps by dragging the icon into place. Save the changes.
5. To remove the workflow completely, click the button **Delete this workflow**.

Assign Specific Persons to Steps: See the instructions for using the admin tool, **Manage User Roles**. Use the tool to assign specific people to their roles so that they are automatically pulled into the workflows that you have designed.

Approval Workflow Permissions: This admin tool restricts Analysts from modifying the workflow design.

1. Click **Approval Permissions**.

Allow (or restrict) the analysts' ability to reorder or add steps to an approval workflow. When restricted, analysts will not see the links, *Reorder steps* or *Add step* in any workflow. Restrictions will take effect immediately, affecting any in-progress approvals.

You may also fine-tune abilities based on a specific role. Pick a role from the selector box. When an ability is restricted, analysts will receive an error message. Restrictions take effect immediately, affecting any in-progress approvals.

2. **Save changes** when satisfied with your settings.

Permission Options: Customize what other permissions are available to the system's users. Who can publish a plan? Who can create and manage the reports? Who can view incomplete and late applications? Adjust these setting for site-wide default behavior.

Publishing Plans as Recruitments

New plans begin in a draft state to allow review before publishing to the wider world. Who can publish a plan?

All Recruit Analysts
If you can create a recruitment plan, you can publish it to the world.

Recruit Administrators only
All recruitments are published by a central administrator.

Diversity Report Management

Diversity reports contain demographic information on a recruitment's applicant pool. Who manages them?

All Recruit Analysts
Recruit Analysts are responsible for creating and managing diversity reports, and are allowed to see them.

Recruit Administrators only
All diversity reports are created and managed by a central administrator.

Application Visibility

Incomplete and late applications are visible to:

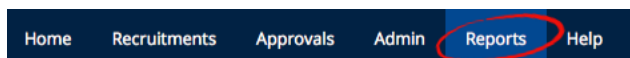
Admins, Analysts, Chairs, and Editors
Allows committee chairs and editors to see applicants with incomplete or late applications.

Admins and Analysts only
Committee chairs and editors will only see applicants with complete, on-time applications.

Features: See which of Recruit's optional features are enabled. Contact the Recruit team at UC San Diego to enable any features you would like to enable.

Administrative Reports

Start with **Reports** in the top menu bar:



Reports are grouped by those required by UCOP and the Applicant & Diversity Reports.

UCOP Reports

UCOP Reports Applicant & Diversity Download Data

Report Type

Faculty Search Report

- Recruitment descriptions
- Core search committee composition
- Applicant pool composition
 - Only "meets basic qualifications" applicants
 - All applicants
 - Shortlisted applicants - applicants with the status of "Invited for interview" or later
- Hired applicants - applicants with the status of "Hired"

Recruitment & Retention Report

- Offers - offer data, including reasons why offers were declined

Options

Academic year: 2013 - 2014

Recruitment type: Regular Rank

Configure Report First!

All administrative reports available. Choices depend on your particular admin role.

Faculty Search Report:

○ Recruitment descriptions

- This report shows information on all recruitments in a given academic year such as position name, department name, initial search allocation, search breadth, title codes, etc.
- *Recruit Administrator* or *Central AP Analyst* access is required for this activity.
 1. Choose **Recruitment descriptions**.
 2. Choose the **academic year** from the drop-down menu.
 3. Choose Regular Rank, Non-Regular Rank, or All Rank from the drop-down menu.

○ Core search committee composition

- Download a report containing diversity data on unnamed core search committee members. Core members are those individuals who were listed on the campus recruitment planning form and have been added to the search committee in Recruit by the Analyst. Gender and ethnicity for these individuals are derived from a central data feed.
- *Recruit Administrator* or *Central AP Analyst* access is required for this activity.
 1. Choose **Core search committee composition**.
 2. Choose the **academic year** from the drop-down menu.

○ Applicant pool composition

- Create a spreadsheet with the data required by UC's Office of the President, consisting of applicant diversity information. The report shows the total number of responses given for gender and ethnicity per recruitment.
- *Recruit Administrator* or *Central AP Analyst* access is required for this activity.
 1. Choose **Applicant pool composition**.
 2. Choose between: "Only meets basic qualifications applicants", "All applicants", or "Applicant pool shortlisted applicants".
 3. Choose the **academic year** from the drop-down menu.

○ Hired candidate composition

- Download a report of all hired applicants in a given academic year.

- *Recruit Administrator* or *Diversity Analyst* access is required for this activity.
 1. Choose **Hired candidate composition**
 2. Choose the **academic year** from the drop-down menu.
 3. Choose **Recruitment Type** (Regular Rank, Non Regular Rank, or All Rank).

Recruitment and Retention Report:

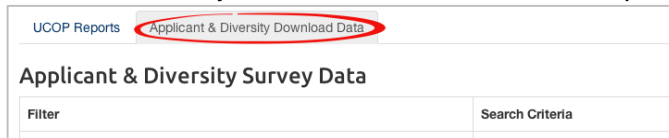
○ Offers

- Download a report of those applicants who have been offered positions in a given academic year and if they accepted or declined (mapped to selected reasons). Analysts generate the data in this report when they update an applicant's status.
- *Recruit Administrator* or *Diversity Analyst* access is required for this activity.
 1. Choose **Offers**
 2. Choose the **academic year** from the drop-down menu.

Applicant & Diversity Download Data

- Create a spreadsheet showing all diversity survey responses for a given academic year.
- The filter-able report will show all applicants for a given recruitment including applied, completed, shortlisted, and non-shortlisted.
- As this report is so encompassing, it possibly *will not* match the per-position diversity report data.
- *Recruit Administrator* or *Diversity Analyst* access is required for this activity.

1. Click the Diversity Download Data tab on the Reports page.



The screenshot shows a web interface with a navigation bar at the top containing 'UCOP Reports' and 'Applicant & Diversity Download Data'. The 'Applicant & Diversity Download Data' tab is highlighted with a red oval. Below the navigation bar is a section titled 'Applicant & Diversity Survey Data' which contains a table with two columns: 'Filter' and 'Search Criteria'.

2. Filter by Academic Year by selecting from the dropdown menu.
3. Click the plus signs to filter other criteria including job number, open date, close date, final date, and survey submission date.
4. Click **Download Data**

Note: If you do not add any filters, then all data will be downloaded. This could take a while!