



Search and Screen Committee Process

University of Wisconsin
Oshkosh



Revision History

Date	Revision
August 28, 2020	Misc.

Introduction

The Office of Human Resources has implemented this system in order to automate all tasks relating to the recruitment process for all professional positions on campus. This system will **not** house student positions. This training manual focuses on the following actions in PageUp:

1. Review/manage/tier/communicate/update/recommend applicants
2. Conduct electronic reference checks

The Employment Application System is designed to run in a web browser over the Internet. The system supports browser versions of Chrome, Firefox, Internet Explorer 5.5 or above, for optimal results Internet Explorer 8 is suggested. The system also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com. To ensure the security of the data provided by applicants, the system will automatically log you out after 120 minutes of inactivity. However, anytime you leave your computer we strongly recommend that you save any work in progress and log out of the system by clicking on the Logout link located on the top right side of your screen.

Access Within the System

Each user on campus has been categorized into a particular user group, which provides them certain permissions in the PageUp system. Please see below for a brief overview of access granted to different types of users for the actions covered in this guide.

Role	Access Level
Hiring Supervisors	View applicants, conduct reference checks, accept search committee recommendations
Administrative Support/Search Assistants	View applicants, change applicant statuses, conduct reference checks
Search and Screen Committee	View/download applications, tier applicants, view job and application statuses

Modes of Training

The recruitment team in the Office of Human Resources understands that every individual has a different learning style. Please see below for the various modes of training offered on this piece of the PageUp system:



Training videos posted on: <http://hr.uwosh.edu/recruitment/>



If you would like to have a member of the recruitment team walk you through creating your position description and job posting over the phone, please call the Office of Human Resources at 920-424-1166 and schedule a time for this phone call.



If you feel comfortable solely using this training guide to create your position description and job posting, this is acceptable. Please know that a member of the recruitment team may reach out to you if there are any follow up items up for discussion.

Important: Understanding the Recruitment Statuses

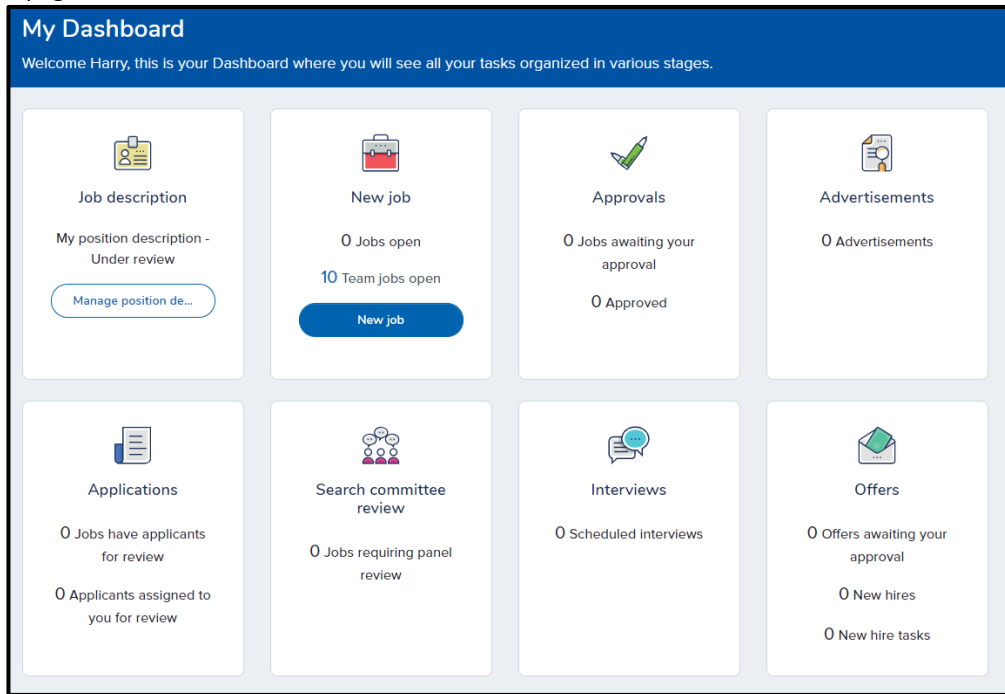
The PageUp system functions based on an ordered list of recruitment process steps. The system is designed to communicate with applicants based on the status they are assigned to throughout the recruitment process. Certain statuses correspond with automated emails sent out to candidates, typically when they are being removed from the process and will no longer be considered. The search assistant/administrative support and search chair assigned to the job will primarily be responsible for managing applicants in PageUp and moving them from status to status based on their progression through the recruitment process. Any status that is labeled as **unsuccessful** represents a step in the recruitment process where they will be removed from consideration due to tiering too low in comparison to other candidates.

#	Step in PageUp (status)	Sends Email to Applicant	Action
1	New application	Yes	Applicants are automatically categorized to this status once they apply and are notified a confirmation of their submission. On the initial position deadline, the Office of Human Resources will move all applicants from New application to Search committee review. Any applicants who apply after the initial deadline will be kept in New application status and are considered part of the secondary pool.
2	Search committee review (HR only Status)		Applicants will be moved to this status by the Office of Human Resources on the initial deadline of the position. This will represent the primary candidate pool.
3	Search committee review unsuccessful		Move applicant to this status if they did not tier high enough to be phone interviewed.
4	Compliance Review #1 - Required prior to any Phone/Virtual Interviews		Mandatory* Move applicant to this status if you would like to invite them to a phone interview. This will allow the Office of Equal Opportunity, Equity, and Affirmative Action to review the candidate pool and approve of your applicants, as well as to ensure proper documentation has been uploaded.
5	Compliance Review #1 Approved (EOEAA status only)		Applicants will be moved to this status by EOEAA once your compliance review #1 has been approved.
6	Schedule Phone Interviews		Move applicants to this status if you call them to schedule a phone interview. If you are using the events function, create your event now.
7	Phone interview booking event	Yes	Move applicants to this status if you would like to use the PageUp system to schedule your interview time slots.
8	Phone interview accepted		Move applicant to this status if they agree to be phone interviewed and have their phone interview scheduled.
9	Phone interview declined		Move applicant to this status if they do not agree to be phone interviewed and have removed themselves from consideration.
10	Phone interview unsuccessful	Yes	Move applicant to this status if a phone interview was conducted and the committee is not interested in moving the applicant further in the process.

11	Candidate on HOLD (temporary)		Move applicant to this status if you would like to keep them “on hold” and wait to determine how first round on campus interviews progress. If applicants in the first round of campus interviews are exhausted, you may come back to applicants in this status.
12	Compliance Review #2 – Required prior to any Campus Interviews		Mandatory* Move applicant to this status if you would like to invite them to an on-campus interview. This will allow the Office of Equal Opportunity, Equity, and Affirmative Action to review the candidate pool and approve of your applicants, as well as to ensure proper documentation has been uploaded.
13	Compliance Review #2 Approved (EOEAA status only)		Applicants will be moved to this status by EOEAA once your compliance review #2 has been approved.
14	Schedule Campus Interviews		Move applicants to this status if you call them to schedule an on campus interview. If you are using the events function, create your event now.
15	On campus booking event	Yes	Move applicants to this status if you would like to use the PageUp system to schedule your interview time slots.
16	Campus interview accepted		Move applicant to this status if they agree to a campus interview and have their campus interview scheduled.
17	Campus interview declined		Move applicant to this status if they do not agree to a campus interview and have removed themselves from consideration.
18	Basic reference check (by phone)		Move applicant to this status if you will be conducting your reference checks outside of the PageUp system.
19	Basic reference check form (using PageUp)	Yes	Move applicant to this status to send an email to each reference contact provided on the applicant’s application requesting basic information.
20	Letter of recommendation request	Yes	Typically used for Faculty searches, move applicant to this status to send an email to each recommender contact provided on the applicant’s application. Recommender will be able to attach letter of recommendation to be automatically uploaded to the applicant’s profile.
21	Search Committee Recommends for Hire		Move applicant to this status if the search committee recommends the hiring supervisor to hire the applicant.
22	Search Committee Does Not Recommend for Hire		Move applicant to this status if the search committee would not recommend hiring the applicant.
23	Hiring supervisor review unsuccessful	Yes	Move applicant to this status if they will not be offered the position.
24	Request offer approval		Move final applicant to this status if you would like to offer the job to them. This status will open the offer card.

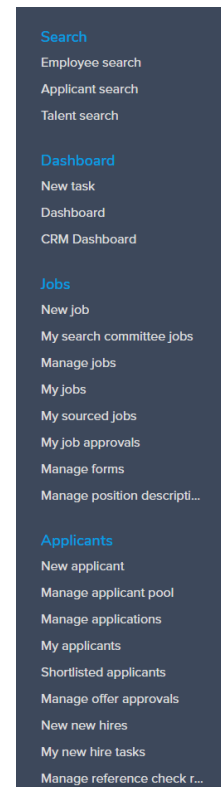
Homepage Tips

When you log in to PageUp, you should see a homepage looking similar to this one. Familiarize yourself with the options on this page.



On the top left side of the homepage, click here to expand your **action menu**. This will be helpful to have expanded at all times.

When your action menu is expanded, you have access to all items listed on the homepage, regardless of what page you're currently viewing.



Helpful Tips

Search and Screen Training

The Office of Equal Opportunity, Equity, and Affirmative Action will be facilitating your training for this search. EOEEA will be meeting with each search committee prior to the start of the recruitment process, at what is commonly called the “charge meeting”. This gives the opportunity for EOEEA to address search specific issues and concerns with the search committee and provide valuable training. All committee members will need to attend this meeting for each search they serve on.

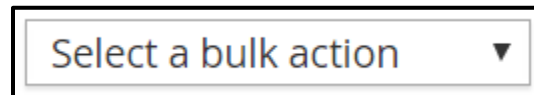
UWO Recruitment website

It is very important to visit the recruitment page on the Office of Human Resources website. This page provides multiple resources revolving around recruitment and the search and screen process such as: interview tips, interviewing bias tips, interview question bank, search and screen resources, online training videos, and much more. Visit the recruitment webpage here:

[Recruitment Website](#)

Colored check boxes in applicant list

When viewing a list of applicants, you will see three boxes next to their name. Each box appears to be a different color. These boxes serve as selection boxes where you may check one of the boxes and select a bulk action to take with the applicant. Despite the colors of the boxes, the functionality for each box is the same.



Primary and secondary candidate pools

Every search and screen member, including the search chair, must be aware of the initial deadline of the position. Hiring supervisors will determine an initial application deadline that applicants are held to if they would like to be considered in the primary candidate pool. Positions will remain posted on the UWO careers page until they are filled or until the hiring supervisors notify the Office of Human Resources to remove the posting. Search committees must exhaust all candidates in the primary pool before they can review candidates from the secondary pool. If at any time a candidate is reviewed and considered from the secondary pool, the search committee is required to review all candidates in the secondary pool. To learn the initial application deadline, reference the **Application Deadline** section of the job posting.

Application Deadline:

TO ENSURE CONSIDERATION: Applications received by (department determined deadline) are ensured full consideration. Applications received after that date may be given consideration at the discretion of the search committee. Application materials will be evaluated and the most qualified applicants will be invited to participate in the next step of the selection process. Incomplete and/or late application materials may not receive consideration.

If you have questions regarding this recruitment, or if you are not able to complete the application online due to a disability or system problem, please contact the Office of Human Resources.

Step 1: Log into PageUp

To log into the PageUp system, you may follow the link below:

Oshkosh.pageuppeople.com

Your username and password is pre-set as your **NetID**, which you use to log into multiple systems on campus.

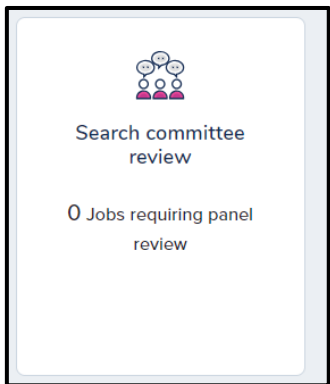
Step 2: Access the applications

Status: Search committee review

Completed by: Search chair AND search committee members

Important: Search committee members and the chair **cannot** assign tiers to applicants until the initial deadline of the position has been met. Once the deadline has been met, all candidates who have applied within the deadline will be moved to **Search committee review** status. Search committee members may only assign tiers to candidates who are in Search committee review status. However, search committee members may still review the application materials of all applicants prior to the deadline.

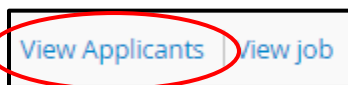
On your homepage, you should have at least one job requiring search committee review. Click **search committee review**:



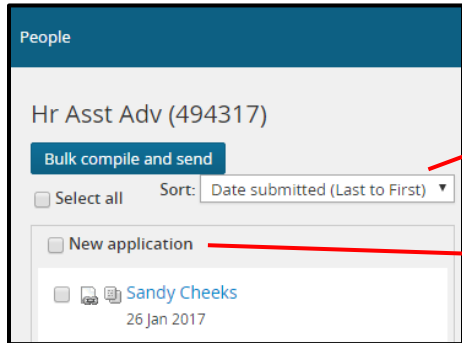
You will be directed to a page that lists the job you are assigned to as a search committee member. If you are assigned to more than one search committee, each job you are involved in will be included in this list.

My search committee jobs					
Job number	Date added	Status	Classification title	User	Total applications
494274	9 Jan 2017	Offer	Marketing Specialist	JF	1
494289	10 Jan 2017	Offer	Dean Assistant	MS	1
494291	10 Jan 2017	Offer	Comm Spec	LS	2
494317	24 Jan 2017	Approved	Hr Asst Adv	SK	2

On this page, under the **Your role** column, you will see whether you are assigned as a search committee member or a search chair on the position. As a search chair, you will be able to view applicants AND view responses from search committee members. If you are a search committee member, you will be able to view applicants only. In order to review applications and tier applicants, both the search chair and committee members must click **View Applicants**. You may also view the position description of the job by clicking **View job**.



Warning: You will be directed to a list of all applicants that are either listed in the **New application** status or **Search committee review** status. Once the posting deadline occurs, the Office of Human Resources will move all applicants who have applied prior to that deadline to **Search committee review** status. All applications submitted after the deadline will be kept in **New application** status to distinguish between the primary and secondary applicant pools. (Search committee review=primary pool, New application=secondary pool)



Notice you may sort the jobs based on your preference.

Applicant status: remember you may only assign tiers to applicants in **Search committee review** status.

Warning: The committee must **NOT** review any applications that have been submitted after the initial deadline. These applications may be reviewed only if the first pool that has applied prior to the deadline has been exhausted. You may find the deadline on the job posting (careers.hr.uwosh.edu/cw/en-us/listing/) in the **Application Deadline** section.

Application Deadline:

TO ENSURE CONSIDERATION: Applications received by (department determined deadline) are ensured full consideration. Applications received after that date may be given consideration at the discretion of the search committee. Application materials will be evaluated and the most qualified applicants will be invited to participate in the next step of the selection process. Incomplete and/or late application materials may not receive consideration.

If you have questions regarding this recruitment, or if you are not able to complete the application online due to a disability or system problem, please contact the Office of Human Resources.

Step 3: Review the resume & application form

Status: Search committee review

Completed by: Search chair AND search committee members

Next to the applicant's name, you will see two icons, which will allow you to view the applicant's resume or their application form and additional documentation.



View resume

View application and additional documentation

Click the icon to **view resume**. This will generate a new window presenting the applicants resume.

Click the icon to **view application**. This will bring you to the application that was completed by the applicant when they applied for the position.

Once the form is open, you will see the applicant's contact information.

Karen Steinhofer	
Applicant address:	800 Algoma Blvd. Oshkosh, Wisconsin 54901, United States
Applicant phone:	
Applicant e-mail:	
Application:	Hr Asst Adv
Applied via:	Website
Source:	Internet - LinkedIn

In the next section labeled **Questions & response**, you will be able to access the documents attached by the applicant when they applied for the position. You may download these documents to review them in detail by clicking on the links provided.

Question & response
To upload a file: 1. Click 'Browse...' and select the file from your computer. 2. Click 'Upload' to send the resume to us, this may take a few minutes. To delete a file that you have uploaded, click 'Delete'.
Please attach your Cover Letter PD Template Edit.docx (150kb)
Please attach your Resume (CV) Assigning the Implementation T (54kb)
Supporting Documents (e.g. Portfolio, letter of reference, etc.) <i>No file uploaded</i>
Add more (optional) <i>Not answered</i>

Warning: Please disregard any information listed in the **Weighted score column**.

Weighted score

Further down in this section, you will be able to review the applicant's answers to information regarding their educational background, employment history, and references. (see below)

Education	
Highest level of education	
Type of education	College / University Graduate

Current/most recent employer	
Employment status	
Currently employed	

Reference 1	
Name of reference	
Jonh	

To exit the application form, click **Close window** and you will land back on the applicant card.

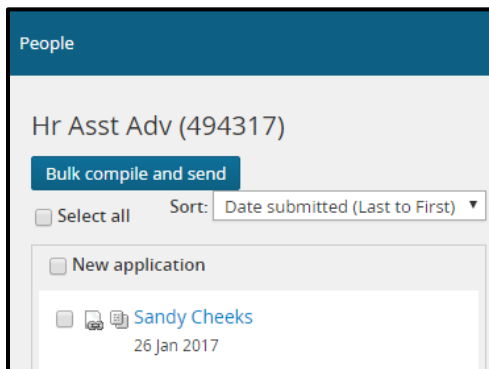
 Print application  Close window
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Step 4: Tier applicants

Status: Search committee review

Completed by: Search chair AND search committee members

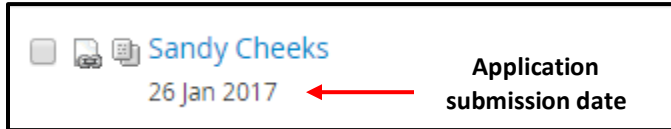
Once you're back to the search and screen page that includes the names of all applicants listed on the left side, you may begin tiering the applicants. Your page should look similar to what is pictured below.



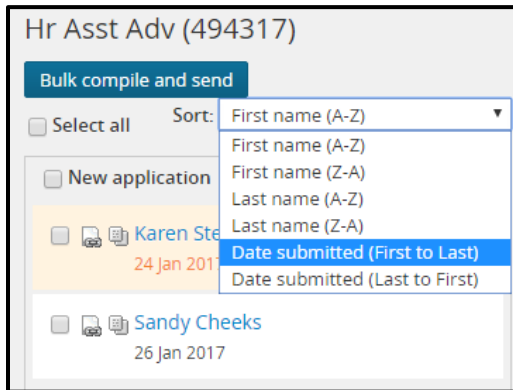
People	
Hr Asst Adv (494317)	
Bulk compile and send	
<input type="checkbox"/> Select all	Sort: Date submitted (Last to First) ▾
<input type="checkbox"/> New application	
<input type="checkbox"/>   Sandy Cheeks	26 Jan 2017

As a search committee member or chair, it is your duty to thoroughly review applicants and assess their qualifications for the position by assigning a tier outcome to each of them.

Warning: If you tier an applicant who has applied after the deadline date, you have engaged the secondary pool of applicants for the position and all applicants, regardless of the date they've applied, will need to be reviewed and tiered by all search committee members. The date the applicant applied for the position is listed directly below their name in the tiering section. (see below)



To avoid tiering applicants who have applied after the deadline date, it may be helpful to sort your applicants from **Date submitted (First to Last)** using the sort function directly above your list.

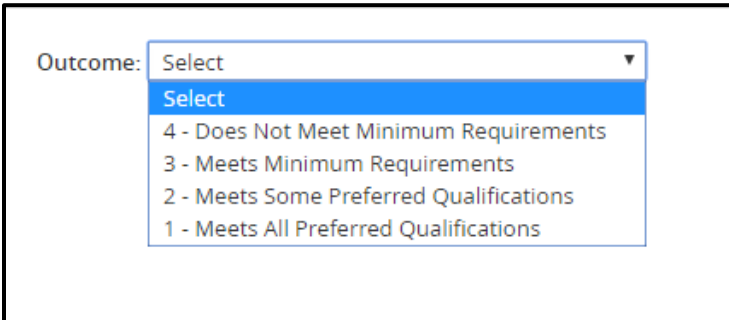


After reviewing the applicant's resume and application form and considering their level of qualification for the position they've applied for, begin assigning a tier to the applicant by **highlighting their name** on the left side applicant list. (see below)

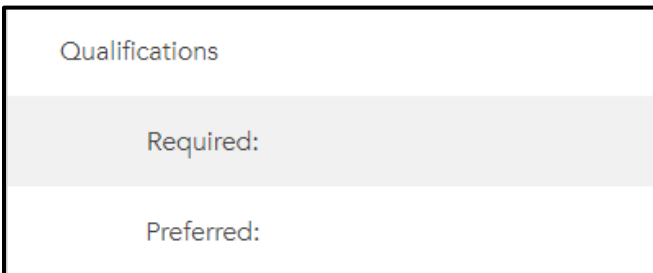


The applicant has been highlighted once their name box has turned a different color.

Once the applicant you are tiering has been selected, in the center of the page you will see an **Outcome** drop down. This drop down lists the four tiers you have to choose from to categorize the applicant.



Qualifications listed on the job posting:



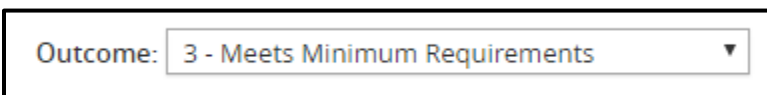
Applicants must each be assigned to a corresponding tier, which is based off of their credentials as noted in their application. The qualifications in the tiering process correspond to what has been posted as required and preferred qualifications of the job.

The Office of Equal Opportunity, Equity, and Affirmative Action will be reviewing each candidate tier later in the process to ensure a fair and equitable opportunity was given to each candidate based on the tiers assigned. They will also be checking to make sure that all candidates have been tiered by each search committee member and search chair.

Before you begin tiering applicants, refer to the job posting on the UWO careers website (careers.hr.uwosh.edu), to understand the required and preferred qualifications that have been requested by the hiring supervisor.

When tiering, if you are given the option to write a comment or summary about the applicant, **please disregard**.

Assign the applicant a tier based on your review. You must click **Save and next** in order to process each tier you assign.



Once you've successfully tiered a candidate, notice on the list of applicants, the applicant you just assigned a tier to will be marked as **Reviewed**. If the **Reviewed** box does not appear, this means you did not click **Save and next**. This must be done before continuing. If you are a search chair, the reviewed box will not appear, however, the tier you assigned to the applicant will appear in the name box.



Next, you may click **Save and next**, which will bring you to the next candidate to be reviewed and tiered, or you may simply click on the next candidate and highlight their name as you just did with the previous one. Once the applicant's name is highlighted, you may assign them a tier as you just did. During your initial review, **only review and tier those who have applied prior to the deadline date of the position posting**.

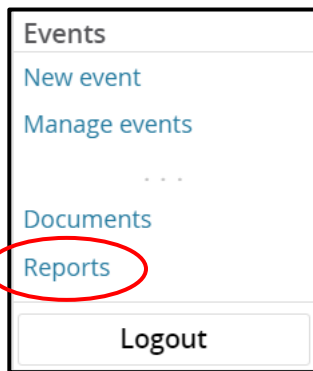
Step 5: Search chair reviews tiering responses (reporting)

Status: Search committee review

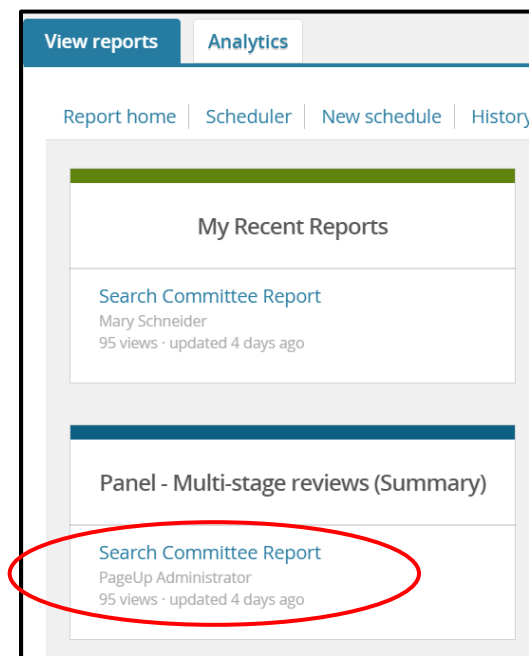
Completed by: Search chair ONLY

Once the search committee has completed the tiering of the initial pool of applicants, the search chair must review these responses and make decisions about moving certain candidates into the next phase of the recruitment process. This may be reviewed and discussed as a group during a search committee meeting, or the search chair may review this information on their own. The search chair will soon send email communications to those applicants who are not moving forward in the search process by changing their status and they will no longer be eligible for the position.

On the right side action menu, scroll to the botto of the menu bar. Click **Reports**.

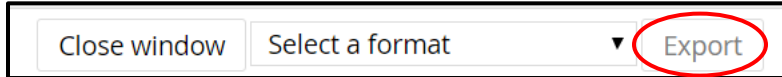


On the reports homepage, a pre-made report will be available named **Search Committee Report**. Click on Search Committee Report.

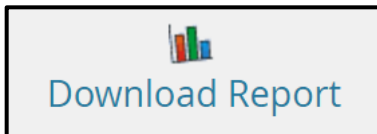


The report will generate all tiers that have been assigned to each applicant by the search committee members at this point in time. This report may be used to hold a discussion amongst the search committee about the overall tiering score of each applicant. It is at the discretion of the search chair to review the report with the search committee members, or to do this on their own. The outcome of reviewing this report will be the decisions made about each applicant on whether they will be moving forward in the search process or if they will not be moving forward in the process.

When the report appears after clicking Search Committee Report, it is recommended to export the information into an Excel spreadsheet. This may be done by clicking **Select a format** on the bottom of the report page and choosing **Excel file**. Click **Export**.



You will then be prompted to download your report, which will allow you to review it.



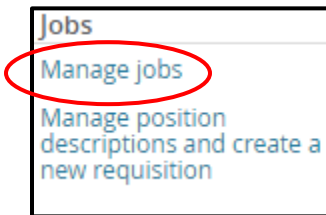
The report will organize the tiers assigned by the search committee by applicant. The search chair and/or committee may review the information and decide which applicants they would like to progress further in the recruitment process based on the averaging of tiers. If questions arise during the review of the Search Committee Report, please call the Office of Human Resources to discuss.

Step 6: Searching for list of all applicants (preparing to change applicant statuses)

Status: Search committee review

Completed by: Search chair and search assistant/administrative Support

When you open the action menu on the right side of the page, click **Manage jobs**.

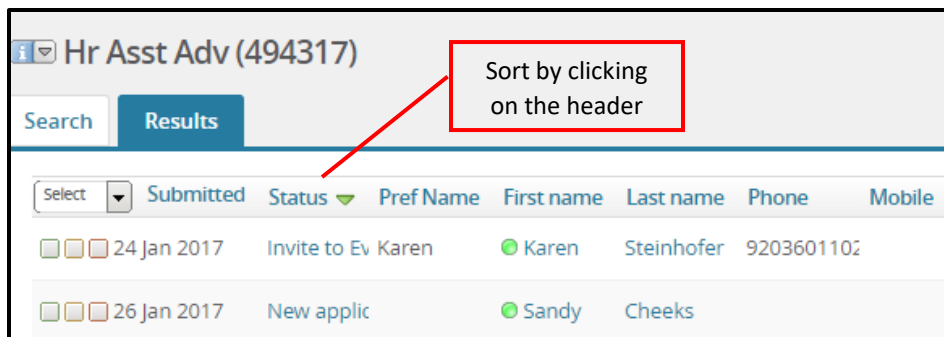


A list of all jobs you are tied to will appear. Find the job you're working on and click on the **number of applications**, located underneath the **Applications** heading.

Job No.	Date created	User	Title	Area	Department	Status	Applications
494315	23 Jan 2017	RHR	HR Generalist	F28 - Administ	Division of Infc	Approvec	1
494317	24 Jan 2017	RHR	Hr Asst Adv	F30 - Administ	Human Resou	Approvec	2

Applications heading

You are now provided with a list of applicants that have applied to the job. You may sort applicants by status, date submitted, first or last name, by simply clicking on the preferred filter along the header.



Step 7: Change the applicant status

Status: Depends on applicant outcome

Completed by: Search chair OR search assistant/administrative support

Important: The PageUp system functions based on a list of applicant statuses. This list is designed to categorize an applicant into a specific status that represents where their consideration for the role falls within the search process. Automated email communications correspond with certain statuses, depending on if the applicant is being moved to an “unsuccessful” status. An “unsuccessful” status is one where the applicant did not perform at a high enough level during the initial review or interviews to move forward in the recruitment process. Moving an applicant to an “unsuccessful” status sends an automated email (that may be customized) to the applicant, informing them that they will not be moving forward in the process. Refer to pages 3 and 4 to review the applicant statuses and to learn which statuses correspond to an automatic email to the applicant.

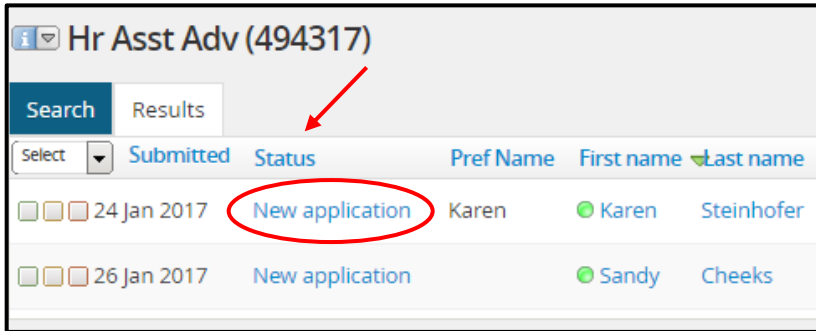
1. Change status to unsuccessful status – removing applicant from consideration

Once the search committee has completed the initial review/tiering of applications and has decided who they would like to progress further into the process with, action needs to be taken with those applicants who will not be moving forward in the process.

By changing the status of an applicant to an “unsuccessful” status, you will be taking the following actions:

1. Sending the applicant an email communication informing them that they were not selected to move forward in the recruitment process.
2. Assigning a non-selection reason code to each applicant for proper documentation of consideration and justification.

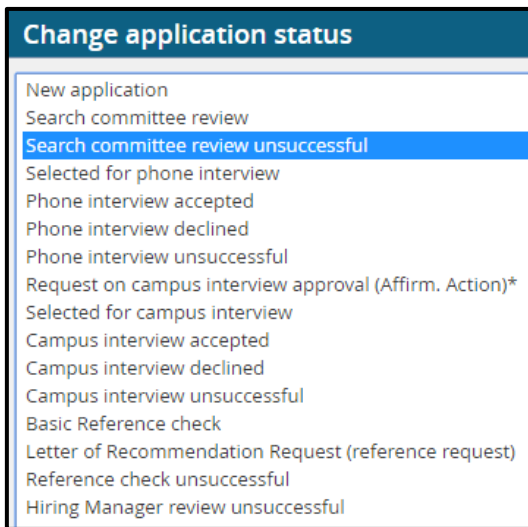
Search for your applicants as you learned in step 6. **Click on the status of the applicant.**



A box will appear providing all recruitment process status options. This is where you may select the status in which you would like to move the applicant to.

Statuses that will remove applicant from consideration: Search committee review unsuccessful, Phone interview unsuccessful, Campus interview unsuccessful, Hiring supervisor review unsuccessful

Highlight the unsuccessful status applicable to the applicant and click **Next**.



A page will appear where you must confirm the status change.

The **status section** of the status change confirmation page is simply available to time and date stamp each status change made for the applicant.

Additional users from Job: <input type="radio"/> Yes <input checked="" type="radio"/> No			
Status	Date	Time	User
✓ New application	24 Jan 2017	2:16 pm	Jo Fenrich
✓ Phone screen 1	28 Jan 2017	4:14 pm	Jodi Anthony
✓ Unsuitable - at this time	26 Jan 2017	4:38 pm	Jo Fenrich
<input type="checkbox"/> Interview 1	<input type="text" value="dd mmm yyyy"/>	<input type="text"/>	--

IMPORTANT: In the **Search committee review unsuccessful reason section**, you will need to assign a non-selection reason code to the applicant stating why you are choosing not to move forward with them. The non-selection reason codes have been pre-determined by the Office of Equal Opportunity, Equity, and Affirmative Action and will be reviewed during the Affirmative Action compliance review. **Each applicant who is not moving forward in the recruitment process must be assigned a non-selection reason code.** If a candidate is no longer being considered for a position and they are not assigned a non-selection reason code at the time of the Affirmative Action compliance review, the search committee will not be able to move forward in the recruitment process until this has been done.

Search committee review unsuccessful reason

Please indicate the reason for selecting the search committee review unsuccessful status:*

Select the applicable status from the list of non-selection reason codes. This code will not be visible to the applicant, but only to the internal users of PageUp. The only time this may be visible to an external party would be if an open records request was made. The non-selection reason codes would then be provided to the requestor.

Select

- Did not pass basic qualification screening - Licenses/Certifications
- Did not pass basic qualification screening - Education
- Not selected for interview - Lacked experience (please justify below)
- Not selected for interview - Lacked in areas specified as preferences (please justify below)
- Unsuccessful interview (please justify below)
- Unsuccessful reference check(s)
- Offer accepted - Failed medical assessment
- Offer accepted - Failed criminal background check
- Offer accepted - No show
- Position on hold/cancelled/not filled
- Withdrawn - Invited to phone screen, unable to contact
- Withdrawn - Invited to phone screen, no show
- Withdrawn - Invited to interview on campus, unable to contact
- Withdrawn - Invited to interview on campus, no show
- Withdrawn - No longer interested in position
- Withdrawn - Salary
- Withdrawn - Accepted another job offer
- Withdrawn - Offer of employment declined

Select

Do not include a note in the status change.

Note

The following will be added to the applicant notes for administrators to view:

Do not include a note unless selecting a code requesting a justification

Update job status from Approved to Screening: Yes No

To change the applicant's status, click **Move now**.

Move now Cancel Spell check

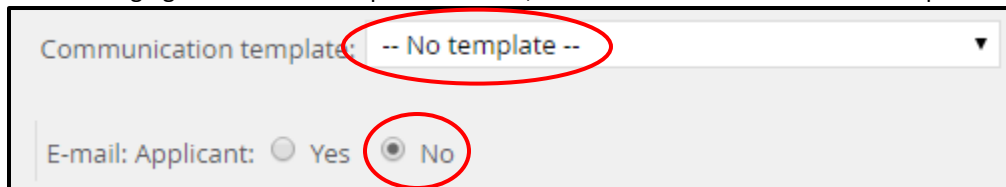
2. Change status to Compliance Review #1 - Required prior to any Phone/Virtual Interviews

Once the search committee has conducted the initial review and tiering and has narrowed it down to who will be invited for a phone interview, the applicant(s) must be put into the **Compliance Review #1** status before being invited for an interview. By putting applicants into this status, you will be opening up your search history to the Office of Equal Opportunity, Equity, and Affirmative Action, who will review your actions in detail. **This is a mandatory step for all positions. If applicants are not put through a compliance review before inviting candidates for a phone interview, it will be considered a failed search.**

What does the Office of Equal Opportunity, Equity, and Affirmative Action assess during this step?

- Evaluate the makeup of the applicant pool in comparison to the interview pools, evaluate screening rubrics and non-selection reasons, and ensure all search documents have been uploaded to the record. This will include items such as advertisements placed, open meeting notices, meeting notes, screening tools, evaluation rubrics, interview questions, open forum presentations or documents, feedback collected, and any other relevant records from search.

When changing the status to compliance review, **do not** select a communication template or email the applicant.



The screenshot shows a form with two fields. The first field is a dropdown menu labeled 'Communication template' with the selected option '-- No template --'. The second field is a radio button group labeled 'E-mail: Applicant' with 'Yes' and 'No' options. The 'No' option is selected.

To finalize the applicant's status change, click **Move now**.



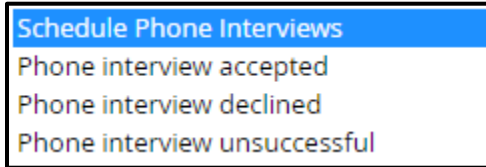
The screenshot shows three buttons: 'Move now' (highlighted with a red circle), 'Cancel', and 'Spell check'.

Move each applicant who you would like to invite to a phone interview to **Compliance Review #1** status. All other applicants should be assigned to the appropriate status at this point depending on the search committee's review and analysis.

What happens next? The Office of Equal Opportunity, Equity, and Affirmative Action will review each candidate in your pool as previously noted. Based on this analysis, the candidates will either be endorsed or sent back to the search committee. If the candidates are sent back to the search committee, a justification as to why they were sent back will be provided and the committee must make adjustments as advised by the Office of Equal Opportunity, Equity, and Affirmative Action. If candidates have been endorsed, the Administrative Support/Search Assistant person assigned to the job will be notified by email.

3. Changing status through phone interviewing phase

If your search committee plans to conduct phone interviews, you must track where each applicant is at within the phone interview process. There are **four** basic statuses revolving around phone interviews:



1. **Schedule phone interviews:** Move the applicant from search committee review status to schedule phone interviews once you start reaching out to that applicant to schedule their phone interview.
2. **Phone interview accepted:** Once you've reached out to the applicant and have successfully scheduled their phone interview without them withdrawing from the process, move them to phone interview accepted.
3. **Phone interview decline:** When scheduling the phone interview, if an applicant declines and withdraws from consideration for the position, move them to phone interview declined. This will document the declination in the system.
4. **Phone interview unsuccessful:** After completing the phone interview, if the applicant did not perform at a high enough level and the search committee does not wish to move forward with the applicant, move the applicant's status to phone interview unsuccessful. Being that this is an unsuccessful status, when moving to this status remember, you will be sending the applicant an email notifying them that they will no longer be considered for the position and assigning them a non-selection reason code. For further assistance with this type of status, refer to **Change status to unsuccessful status – removing applicant from consideration** directions provided above.

4. Change status to Compliance Review #2 – Required prior to any Campus Interviews

Once the search committee has conducted phone interviews and has narrowed it down to who will be invited for an on-campus interview, the applicant(s) must be put into the **Compliance Review #2** status before being invited for an interview. By putting applicants into this status, you will be opening up your search history to the Office of Equal Opportunity, Equity, and Affirmative Action, who will review your actions in detail. **This is a mandatory step for all positions. If applicants are not put through a compliance review before inviting candidates for an on-campus interview, it will be considered a failed search.**

What does the Office of Equal Opportunity, Equity, and Affirmative Action assess during this step?

- Evaluate the makeup of the applicant pool in comparison to the interview pools, evaluate screening rubrics and non-selection reasons, and ensure all search documents have been uploaded to the record. This will include items such as advertisements placed, open meeting notices, meeting notes, screening tools, evaluation rubrics, interview questions, open forum presentations or documents, feedback collected, and any other relevant records from search.

When changing the status to compliance review, **do not** select a communication template or email the applicant.



The screenshot shows a form with two fields. The first field is a dropdown menu labeled 'Communication template' with the value '-- No template --'. The second field is a radio button group labeled 'E-mail: Applicant' with two options: 'Yes' and 'No'. The 'No' option is selected, indicated by a filled radio button.

To finalize the applicant's status change, click **Move now**.



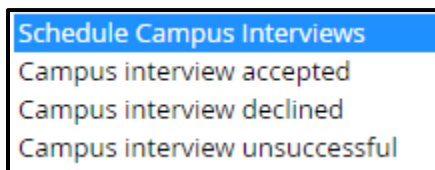
The screenshot shows a horizontal bar with three buttons. The first button is 'Move now' and is highlighted with a red oval. The second button is 'Cancel' and the third is 'Spell check'.

Move each applicant who you would like to invite to an on-campus phone interview to **Compliance Review #2** status. All other applicants should be assigned to the appropriate status at this point depending on the search committee's review and analysis.

What happens next? The Office of Equal Opportunity, Equity, and Affirmative Action will review each candidate in your pool as previously noted. Based on this analysis, the candidates will either be endorsed or sent back to the search committee. If the candidates are sent back to the search committee, a justification as to why they were sent back will be provided and the committee must make adjustments as advised by the Office of Equal Opportunity, Equity, and Affirmative Action. If candidates have been endorsed, the Administrative Support/Search Assistant person assigned to the job will be notified by email.

5. Changing status through on campus interview phase

The search committee must track where each applicant is at within the campus interview process. There are **four** statuses revolving around campus interviews:



The screenshot shows a dropdown menu with four options. The first option, 'Schedule Campus Interviews', is highlighted in blue. The other three options are 'Campus interview accepted', 'Campus interview declined', and 'Campus interview unsuccessful'.

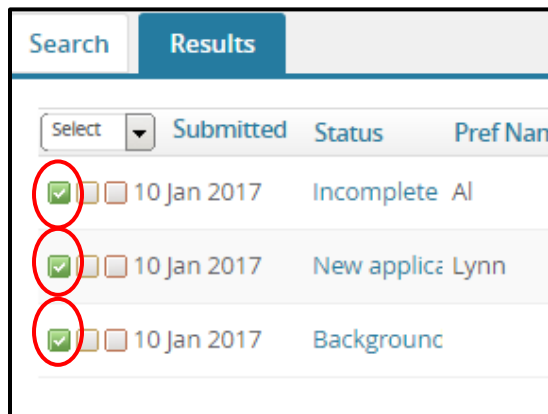
1. **Schedule campus interviews:** If the applicants have been endorsed by the Office of Equal Opportunity, Equity, and Affirmative Action, they will be moved to this status by the Office of Equal Opportunity, Equity, and Affirmative Action.
2. **Campus interview accepted:** Once you've reached out to the applicant and have successfully scheduled their campus interview without them withdrawing from the process, move them to campus interview accepted.
3. **Campus interview decline:** When scheduling the campus interview, if an applicant declines and withdraws from consideration for the position, move them to campus interview declined. This will document the declination in the system.

- Change statuses in bulk

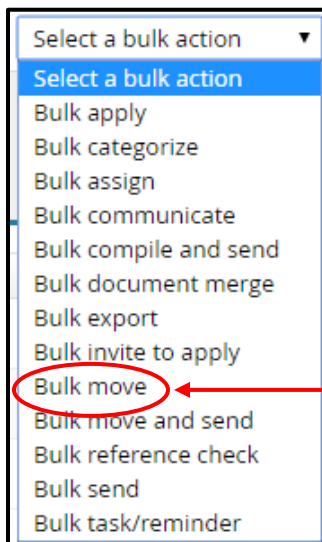
If you would like to change the status of multiple applicants at one time, you may do so by selecting those applicants in bulk and moving them to the desired status. In order to bulk move applicants, you must find your full applicant list by following the directions in step 6.

Warning: If you are bulk moving applicants to an **unsuccessful** status, keep in mind that you may only move more than one candidate to this type of status if you are planning to assign the same non-selection reason code to each applicant. The system does not allow you to assign different non-selection reason codes to applicants in mass through an individual bulk move.

Select each candidate you would like to move in bulk by checking the same color box for each applicant on the left hand side of your applicant list.

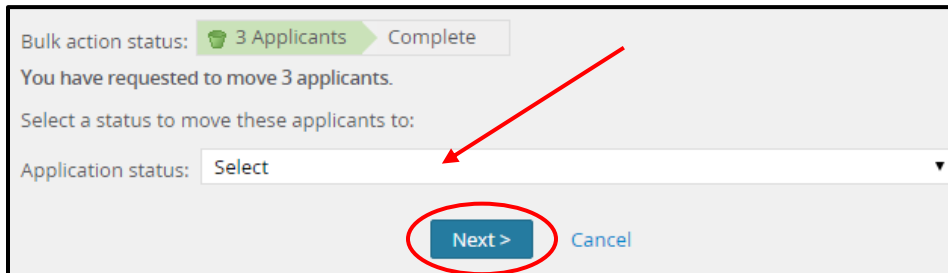


Once you've selected which applicants you would like to change statuses for, refer to the **Select a bulk action** drop down menu. Click **Bulk move**.



Select **bulk move** if you'd like to change the statuses of more than one applicant.

You will be directed to a page where you may select the desired status from a drop down bar. Select the status you'd like to move the applicants to and click **Next**.



Bulk action status: 3 Applicants Complete

You have requested to move 3 applicants.

Select a status to move these applicants to:

Application status: Select

Next > Cancel

A confirm status change page will appear and you may follow the directions provided in step 7 while completing the requests. Depending on the status you've selected to move your applicants to, you must follow the same procedure when moving statuses to an **unsuccessful** status or to the **compliance review** status in bulk as you do when moving applicant statuses one at a time.

Step 8: Reference checks/request letters of recommendation

Status: Basic reference check or Letter of recommendation request (reference request)

Completed by: Search chair OR search assistant/administrative support

Once campus interviews are complete and finalist applicants have been determined, the search committee has the option of conducting reference checks more than one way in the PageUp system. Reference checks may also be completed outside of the system if the search committee/hiring supervisor would rather contact the references over the phone.

When applicants apply for a position using the PageUp system, they are required to provide three reference contacts/recommenders with their application. There are two reference screening options to choose from in PageUp should the hiring supervisor decide to conduct reference checks electronically:

1. **Basic reference check form:** When an applicant's status is moved to basic reference check form, an email will be sent out to the three contacts provided where they will be prompted to answer eleven basic questions about the applicant, electronically. Once the reference has completed the electronic reference check questions, their answers will be automatically tied to the applicant's profile, where they may be reviewed by the search committee and hiring supervisor.
2. **Letter of recommendation request:** When an applicant's status is moved to letter of recommendation request, an email will be sent directly to the recommenders provided by the applicant. The email will ask the recommenders to attach a letter of recommendation to the applicant's profile, which is a very simple task. Once attached, the letter of recommendation will be available for the search committee and hiring supervisor to review.

Step 9: Make hiring recommendations

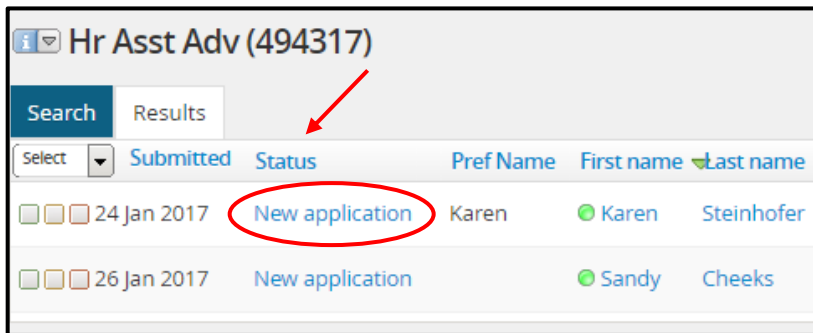
Status: Search Committee Recommends for Hire or Search Committee Does Not Recommend for Hire

Completed by: Search chair OR search assistant/administrative support

The search committee must make a decision regarding who they would like to recommend hiring to the hiring supervisor and who they would not recommend hiring to the hiring supervisor. Typically, these decisions are made by the committee after a final meeting to discuss thoughts revolving around the finalists. Once these decisions have been made, the search chair or search assistant/administrative support person assigned to the position must move the applicants into the applicable statuses:

If placing an applicant into Search Committee Does Not Recommend for Hire status, the committee must assign a non-selection reason code to each applicant for proper documentation of consideration and justification.

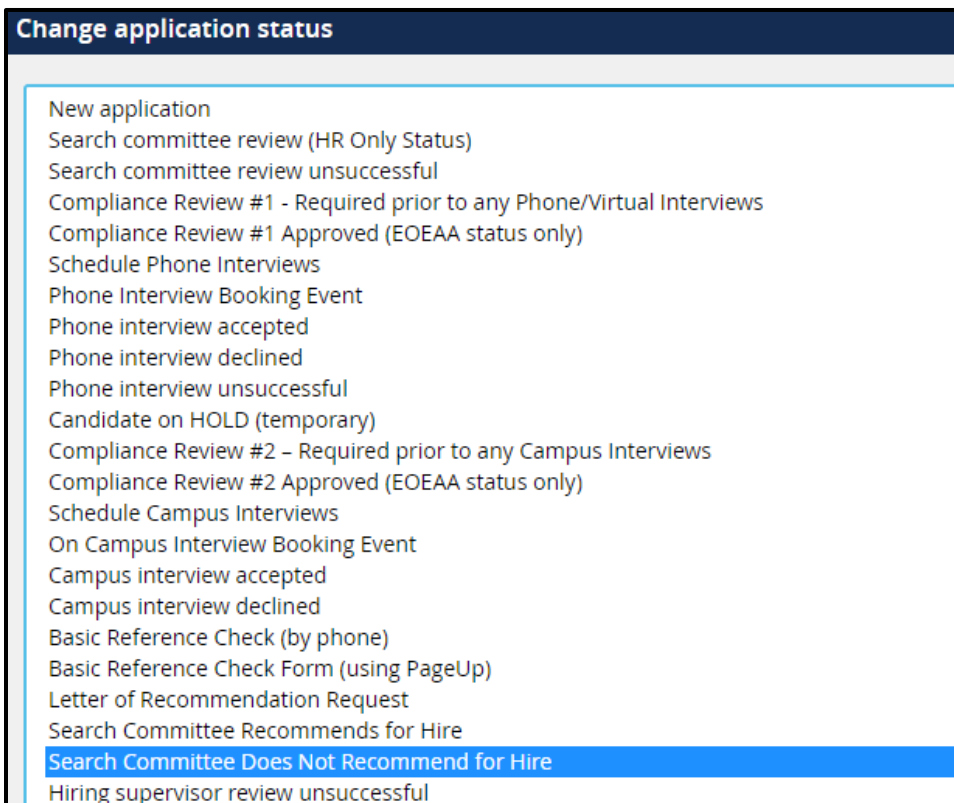
Click on the status of the applicant.



Select	Submitted	Status	Pref Name	First name	Last name
<input type="checkbox"/>	24 Jan 2017	New application	Karen	Karen	Steinhofer
<input type="checkbox"/>	26 Jan 2017	New application		Sandy	Cheeks

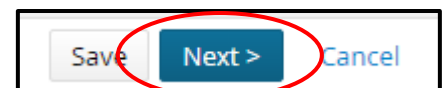
A box will appear providing all recruitment process status options. This is where you may select the status in which you would like to move the applicant to.

Highlight the not recommended for hire status and click **Next**.



Change application status

- New application
- Search committee review (HR Only Status)
- Search committee review unsuccessful
- Compliance Review #1 - Required prior to any Phone/Virtual Interviews
- Compliance Review #1 Approved (EOEAA status only)
- Schedule Phone Interviews
- Phone Interview Booking Event
- Phone interview accepted
- Phone interview declined
- Phone interview unsuccessful
- Candidate on HOLD (temporary)
- Compliance Review #2 - Required prior to any Campus Interviews
- Compliance Review #2 Approved (EOEAA status only)
- Schedule Campus Interviews
- On Campus Interview Booking Event
- Campus interview accepted
- Campus interview declined
- Basic Reference Check (by phone)
- Basic Reference Check Form (using PageUp)
- Letter of Recommendation Request
- Search Committee Recommends for Hire
- Search Committee Does Not Recommend for Hire**
- Hiring supervisor review unsuccessful



Save **Next >** Cancel

A page will appear where you must confirm the status change.

When changing the status to not recommended for hire, **do not** select a communication template or email the applicant.

Communication template: -- No template --

E-mail: Applicant: Yes No

The **status section** of the status change confirmation page is simply available to time and date stamp each status change made for the applicant.

Additional users from Job: Yes No

Status	Date	Time	User
✓ New application	24 Jan 2017	2:16 pm	Jo Fenrich
✓ Phone screen 1	28 Jan 2017	4:14 pm	Jodi Anthony
✓ Unsuited - at this time	26 Jan 2017	4:38 pm	Jo Fenrich
<input type="checkbox"/> Interview 1	<input type="text" value="dd mmm yyyy"/>	<input type="text"/>	--

Select the applicable status from the list of non-selection reason codes. This code will not be visible to the applicant, but only to the internal users of PageUp. The only time this may be visible to an external party would be if an open records request was made. The non-selection reason codes would then be provided to the requestor.

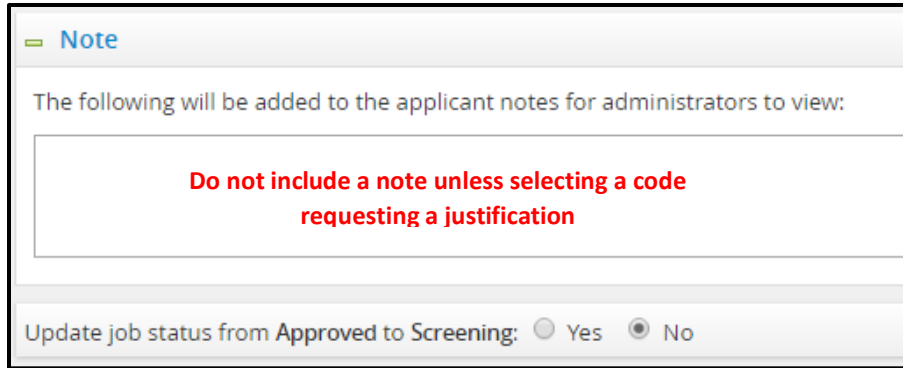
Search committee review unsuccessful reason

Please indicate the reason for selecting the search committee review unsuccessful status:*

Select

- Select
- Did not pass basic qualification screening - Licenses/Certifications
- Did not pass basic qualification screening - Education
- Not selected for interview - Lacked experience (please justify below)
- Not selected for interview - Lacked in areas specified as preferences (please justify below)
- Unsuccessful interview (please justify below)
- Unsuccessful reference check(s)
- Offer accepted - Failed medical assessment
- Offer accepted - Failed criminal background check
- Offer accepted - No show
- Position on hold/cancelled/not filled
- Withdrawn - Invited to phone screen, unable to contact
- Withdrawn - Invited to phone screen, no show
- Withdrawn - Invited to interview on campus, unable to contact
- Withdrawn - Invited to interview on campus, no show
- Withdrawn - No longer interested in position
- Withdrawn - Salary
- Withdrawn - Accepted another job offer
- Withdrawn - Offer of employment declined
- Select

Do not include a note in the status change unless selecting a code requesting justification:



Note

The following will be added to the applicant notes for administrators to view:

Do not include a note unless selecting a code requesting a justification

Update job status from Approved to Screening: Yes No

To change the applicant's status, click **Move now**.



Move now Cancel Spell check

The hiring supervisor will then have access to candidates in these two statuses. If a hiring supervisor is interested in offering the position to a candidate who has not been recommended for hire, a justification must be sent to the Office of Human Resources explaining why they are choosing to go against the search committee's recommendations.

The hiring supervisor may now continue with the recruitment process by completing the offer card and requesting offer approval in PageUp. This step must be approved before a verbal offer can be made. For directions on the offer process in PageUp, please reference the Offer Process Training Manual located on the Recruitment website.