Creating a Search Plan in UC Recruit Training

College of Health Sciences/SOM Office of Academic Affairs
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CREATE A NEW RECRUITMENT – SEARCH PLAN

The Basic recruitment

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

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

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

3. Read the Overview page and then click the **Next** button.

4. Fill in the fields in the form:

   - **Recruitment name**: Consider giving it a unique, descriptive name, something that matches your ad copy and also incorporates your unit's name. This is particularly helpful for the applicant who may be applying to more than one "Associate Professor" position.
- **Description**: The description appears to applicants on the corresponding apply page. Insert the full ad text. 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.
  - At UCI, include the Equal Opportunity/Affirmative Action Employer tag line *(EEO)*. The University of California, Irvine is an Equal Opportunity/Affirmative Action Employer advancing inclusive excellence. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, age, protected veteran status, or other protected categories covered by the UC nondiscrimination policy.
  - At UCI, 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 🌐https://recruit.ap.uci.edu/apply/JPF0 ...

- **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#**: Enter the Budget Approval # IDXXX (be sure to title it Budget Approval # as this field is also used for other purposes).

- **Salary range, Rank/Step, and Job location**: These optional fields will help with tracking.

- **Search Information**
  - **Search breadth**: Is this an open/general search or a targeted/specialized search?
  - **Initial search allocation**: 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.

**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.

<table>
<thead>
<tr>
<th>Optional Information Link</th>
<th>Information URL: <a href="http://www.test.department.uci.edu/jobs">http://www.test.department.uci.edu/jobs</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Optional - check with your webmaster if you are unsure what you should put here</td>
<td></td>
</tr>
</tbody>
</table>
About Application Dates

Analysts will need to decide on the dates applicants are to submit their applications. There are two distinct types of recruitments: Open/Closed/Final and Initial Review Dates/Open Until Filled.

***Most campuses prefer “Initial Review Date/Open Until Filled” Check with your campus Recruit Administrator if you’re unsure.

IRD/ Open Until Filled — Choose this for searches in which applicants are received in discreet windows bookended by review dates. Completed applications are visible to the search committee once a review date passes. Applicants will still be able to apply until the final date; however they can only be reviewed if another review date is added by an analyst.

Key features of Initial Review Dates/Open Until Filled:

- The initial review date (which you’ll sometimes see abbreviated as IRD) is set before the recruitment opens.
- The analyst is the only one who can add new review dates.
- You can have multiple review dates; as many as you need.
- You can only ever have one future review date.
- You can only add new review dates after all existing review dates are past.
- You can only add new review dates that are after all existing review dates.
- Review dates, once set cannot be changed — this is designed to keep the advertisement and submission dates in sync.
- Applicants are “put into” the first review date that occurs after they complete their application.
- Applicants are not visible to the search committee until the review date they’re in passes.
- Analysts can see applicants regardless of completeness or review date.
- Applicants in a past review window cannot update their application materials.
- Applicants in a past review window can still update their contact information.
- Review dates are marked as public or private. Public review dates are visible to applicants before they apply; private review dates are never visible to the applicants.
- Applying before a public review date is a guarantee that their application will receive full consideration.
• Applicants outside of review dates cannot be considered.
• All applicants in public review dates require disposition reasons before the search can conclude.

Open/Close/Final Recruitments — All applicants will be received before any are reviewed. Applications are visible to the search committee as soon as they are complete. If no suitable applicants have been found, only an administrator (not the analyst) can extend the recruitment's close and final dates to allow more applicants to apply.

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. **Hint:** Push out your Open date to give the Search plan time to go through the approval process.
• 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 at any time.

Title Codes and Availability Data

**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.

1. 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.
2. Click the ‘x’ to remove a title code.
**Hiring type:** Automatically determined based upon title codes.

**Fields of study:** The data supplied here will be used with the Diversity Survey Reports, a core feature of Recruit. All applicant pools must be compared against the national availability data, which is associated via the fields of study.

Enter the fields of study that best fits your recruitment into the box. Recruit will display either the name or an alphabetically sorted list of those that match. The limit is capped at 40, however you will rarely need more than 5 fields of study. Click the ‘x’ to remove.

**Fields of study rollups:** Fields of study that contain smaller availability numbers are purposely rolled up into larger ones—so if you can’t find what you’re looking for, you must choose a more general category. Data sources are explained here:

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

**Recruitment Contact Email:** If you're creating the recruitment, your name will appear in this editable field as the person in charge of the recruitment. Analysts, administrators, and the online search committee will use this contact.

**Department Mailing Address:** Verify your department mailing address (shown to applicants and references).
Finally, look over the information for accuracy and click the **Save & Done** button.

The basic recruitment is done, but you will need to configure it further.
- Choose **Yes, Configure for Online Applicant Management** in the confirmation box.
- Or you can stop here and configure this at a later date.
- If you never configure, it remains a “Basic” or “Survey only” recruitment and applications will then have to be handled outside of the system. This would not be using the full functionality of Recruit.

**CONFIGURE THE RECRUITMENT**

A success message appears at the top of the new recruitment's Details page. This new recruitment is a draft. Keep going. Configure it. Submit it. Then publish it.

1. Expand the checklist to see what information is missing:

2. Green dots with checkmarks indicate the information is complete. Solid dots (orange) indicate information is needed. Click the corresponding "Add now" links to enter the information:
3. Next, work your way through the menu items on the left of the screen. Check other pages for dots, indicating fields that need your attention.

**COMPLETING THE SEARCH PLAN**

**DETAILS**

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

**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 shows various states for a recruitment.
URL for Applicants: A unique URL for the recruitment is displayed in the status box. Use this link for job ads, postings, electronic mailings, and links on other websites. Clicking the URL displays a preview of the apply page as it will appear to applicants once the recruitment is open and published.

REQUIREMENTS

This is where the analyst configures what the applicants will need to provide in the way of references and documents. The requirements you establish cannot be changed once your first applicant applies!

References:

1. Click the button to configure the reference requirements.
2. Choose a Reference type:
   - Choose None when applicants will not be asked for any references.
   - Choose Only contact information when applicants will be asked to name references to complete their application. The references will not be asked to provide letters unless the analyst requests them.
   - Choose Letters of recommendation when applicants will be asked to name references, and the applicant must request letters to complete their application.
3. Choose numbers: Select the number of required and optional references.
4. Show references to
   - Leave this at the default, OR…
   - restrict reference viewing to certain members of the search committee. This flexibility is important if departments wish to exclude any graduate students who may be serving on their search committee.
   - Show references to is the only attribute of the references requirement section that remains editable after the first applicant applies.
5. Expand the Edit thank you email template. This is the email message that will be sent to references once the system detects an uploaded letter. Annotate the template if you wish.

▶ Edit thank you email
6. Click **Save changes** to save the references requirements configuration.

**Documents:**
1. Click the **Get started** button to set up document requirements. Recruit has provided a default, recommended list of documents to request of applicants.
2. After clicking **Get started**, document requirements are fully configurable.

<table>
<thead>
<tr>
<th>Add</th>
<th>Click the Add button to add document requirements one-by-one.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reorder</td>
<td>Using your mouse, drag the icon to the left of any document to rearrange the order. This will be the order applicants will see when they apply.</td>
</tr>
<tr>
<td>Edit</td>
<td>Click the Edit link to change the name of any document, modify the description, or change the document from required or optional. <strong>Note:</strong> To ensure the curriculum vitae document is properly appended to reports, please only use: CV, Curriculum Vitae, Resume, or Resumé.</td>
</tr>
<tr>
<td>Delete</td>
<td>Click the Delete link beside any document and confirm its deletion when asked.</td>
</tr>
</tbody>
</table>

3. Analysts must complete documents requirements carefully, as this section will be locked once the first applicant applies. If you need to collect additional information from applicants later, it will only be possible to **add optional documents**.

**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:** Icons indicate whether the information is part of the Search **Plan** or Search **Report**. Roll over the badge for helper text.
The Diversity section includes:

**Availability data:** A table shows the recruitment's fields of study along with the corresponding national availability data that is provided via the UC Office of the President. Note: If the recruitment has multiple fields of study, the table will show an average that takes into account the number of individuals in each field. Fields of study with more individuals will have a bigger impact on the overall average than fields 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.

**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 advisor:** 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.
This section is for all documentation related to advertising. Committee chairs, editors, reviewers, and approvers can view this section and analysts can edit the section. Chairs and editors can also edit the Search & Recruitment Effort fields and upload ad documents.

The Advertisement section includes:

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

In addition to national advertising, measures should be undertaken to ensure consideration of a large and diverse pool of qualified candidates and to ensure that this pool includes candidates targeted under the campus affirmative action program; i.e., minorities, women, persons with disabilities, and protected veterans. Increasing outreach and awareness at the earliest stages of the recruitment process is one of the most important steps UCI can take to enhance its diversity. Departments and search committees must take an active role in expanding the pool of qualified women, minorities, individuals with disabilities, and protected veterans in all recruitment

http://www.oecd.uci.edu/policies/diversity_ad.php. Your equity advisor, Lisa Flanagan (lflanaga@uci.edu) in the SOM, is a great resource for any questions regarding inclusive
excellence in the search process. For Senate recruitments, the Search Committee Chair will need to reach out to the Equity Advisor on planned outreach efforts and schedule training for the search committee on best practices for a non-biased search process, this is preferably done at the first meeting of the search committee. All advertising venues must be listed in AP recruit prior to submitting the search plan for approval.

**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.

**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 Evidence:** For OFCCP (Federal audits), copies of actual ads will be needed. Return to this area when you can provide proof that an advertisement was placed. This information will be included in the final Search report.
Once a search plan has been approved all listed procedures must be followed; any deviation from the approved plan will cause delays in your recruiting and hiring efforts.

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.

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.

The Qualifications section includes:

Basic, Additional and Preferred: At the very minimum, fill in the Basic qualifications!

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

Use this section to document what the committee will base their decisions upon. Approvers and reviewers may see these fields but may not edit them.

The Selection Process section includes:

**Selection Criteria:** Provide a detailed description of the selection criteria to be used in evaluating candidates.

**Selection Plan:** Document the plan that the search committee will use to evaluate the applicants in order to select a shortlist and finalist (ex: phone interviews, in-person interview, etc.)

**Specializations:** Create a custom list for applicants to match their area of study or expertise as they fill out their application. Applicants will be able to pick as many specializations as they desire, or they can choose to pick none. Reviewers will be able to find applicants by their specializations.
Cut and Paste Specializations: Recruit supports cut-and-paste of entire lists of specializations from other sources. Paste them in and click “Add.” Remember to Save changes.

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 applicants. Any committee member and named approver can view this section but only analysts may add/edit members.

The Chair of the Department will designate the membership of the search committee. The committee will consist of a minimum of 3 members and represent an appropriately broad diversity of gender, race, perspectives and knowledge of the field or expertise of the position. The Search Committee is a requirement and must be completed prior to submitting the search plan for approval.

Committee permissions. This section includes:

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:**

- **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. Analysts can use the “Edit” button to grant Reviewers disposition permissions. By granting this access, reviewers may take care of dispositioning applicants, a task that is usually reserved for the analyst, chair, or editor.

**Additional Access:**

*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**

1. Click the **Add** button in the Core Committee part of the page.

2. Choose a role and then start entering the person’s first or last name, email address, or campus ID into the search box. Click the Add Button after selecting a role and a finding a user.

3. The name will be added beside the appropriate role on the page.

4. Click **Edit** beside the name to update the role or remove the member from the committee. Reviewers may be given permission to disposition applicants.
Setting up the Search Committee – Adding members in bulk

1. To add committee members using an extended search click the **Add members** button.

   ![Add members button](image)

   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.

   ![Add Members to Search Committee](image)

**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).
The system serves as a single repository for applicant and search committee data and is utilized by UCOP to run regular reports provided to the Regents. In addition, Compliance offices system wide, including OEOD, relies on the data in UC Recruit to run analysis required by the Office of Federal Contract Compliance Program (OFCCP).

UC Recruit is the system of record for Academic Recruitment at UCI. **Full documentation, including interview materials, must be maintained in UC Recruit** for each search to satisfy the requirements of various agencies, which may post-audit any recruitment.

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

**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.

**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**.
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.

Otherwise, click **Yes, submit for approval**.

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 Campus ID 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 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 Campus ID 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.

3. Once added, don’t forget to specify a person for the new step!

Reorder Steps. (ex: “let’s not bother the Chair until the Dean’s Analyst approves”). Dean’s Analysts should review the search plan prior to the Chair approving.

1. Click the link, “Reorder steps.”

2. Place your cursor over the icons and drag the step into place.

3. Click “Save changes.”

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

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

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.

1. Click the “Notify Approvers” button.

2. Type the message, choose whom to send it to, and click “Send Email.”

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**The Approvals Dashboard**

Monitor approvals in progress. This page is especially useful for those responsible for many approvals or for those with permission to monitor approval requests across the campus.

1. Click **Approvals** in the top menu bar. The approvals dashboard opens.

2. Narrow the list or adjust the data using any of the following tools:

   - **Search:** Zero in on a particular attribute using the search box.
   - **Columns:** Many columns are sortable. Click directly on a column header to sort.
• **Filters:** Filters display on the horizontal *workspace ribbon*, located at the top of the data grid. In the middle of the ribbon, you'll see which filters are active. Hover or click on any filter to quickly update it.

• **Edit workspace:** Use the *Edit workspace* button to customize your filters and columns.

• **Manage workspace:** Think of a workspace as a combination of particular filters, columns, and sorting. Hover or click the end cap of the workspace ribbon to create & name a workspace, rename, or delete it.

• Refer to the section, *Workspaces: Recruit’s Filters, Columns, and Sorting*.

**Take a Tour!**
For a step-by-step introduction to Recruit’s workspaces, click the Tour button, located at the top, right side of your screen, just below your login name.

**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.

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

   ![Really publish? dialog](image)

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