Rating and Routing Applicants Job Aid

Purpose: This job aid will provide the Posting Admin or search committee important information when reviewing and rating applicants for merit, faculty/other, or P&S postings. For campus wide consistency, the rating process is completed by assigning a value to each of the applicants instead of free text comments. The Not Qualified or Qualified 0-5 value rating will allow a reviewer and UHR to understand why an applicant was or was not chosen to continue in the hiring process.

What Is an Applicant Status?

The Posting Administrator and those involved in the hiring process use applicant statuses to rate and classify applicants. The applicant status indicates if an applicant is rated (not qualified or qualified 0-5), selected for an interview, not interviewed, or placed in a review/holding state for the possibility of later consideration.

Viewing Applications

During the posting period, the Posting Admin and other users associated with this posting can view applicant materials as they apply for P&S and Faculty/Other postings (For Merit postings, applications will be released to the Posting Admin after UHR has completed a review for Contract Transfer). As applicants submit the application materials, the Posting Admin may proceed with entering the ratings. If the posting is for pools (e.g. lecturer pool) applicants can be rated, flagged and routed before the posting closes.

1. Log into **PeopleAdmin**.
2. Update your Role to **Posting Admin** (or **Search Committee**).
3. Click the **refresh** button.

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4. Hover over the Postings tab and click the appropriate **position type** (e.g. P&S, Faculty/Other, Merit).
5. Search for the **Posting title** or locate the posting in the list below
6. Click hover over **Actions** to select **View Applicants**.
7. Review the application materials individually or in bulk:
   a. **Individual View**: Click on the applicant's last name to view the submitted application and supporting materials (Merit applicants are only asked to submit the Application with Education and Work History and will not have an option to attach supporting materials). You may view documents individually or generate a combined PDF of all documents near the bottom of the page.
   b. **Bulk View:** To view applicant materials in bulk, select applicants by checking the boxes to the left of the applicant's name. Next, hover over the **Actions** button, and select/click **Download Applications as PDF** (combined into one PDF)**.** You will then have the choice of which documents will open. The applicants' material will now open in a new browser tab or window. *Adobe Reader must be installed to view the materials properly.*

Viewing Reference's Recommendation (Faculty postings only)

After the applicants recommendations have been sent back, you are able to review the provided information. To do this:

1. Navigate to the **posting** on People Admin and click on **Applicants.** Click the appropriate **Applicant's** last name.

2. While viewing the **Applicant** information you will see three tabs: **Summary, Recommendations** followed by 2 numbers (for example 1 of 1), and **History.** Click the **Recommendations** tab.

3. You will see **Reference Requests** if an email has been sent out to a reference and whether they have responded. Below **Reference Requests** is where you will see completed **Recommendations.**

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Rating Applicants (Posting Admin Only)
Owner: Posting Admin; **Current Status**: Under Review by Posting Admin

The Posting Admin must review each applicant and provide a rating (either hiring manager's rating or on behalf of the search committee). The rating range is 0-5 or Not Qualified; with 5 being the rating of the best qualified applicant(s) based on the preferred qualifications on the posting. After the Posting Admin enters the rating, then she/he can move the applicant to a new status or keep the applicant at this holding state until the Posting Admin is ready to move the applicant to a final status. If an applicant is chosen for an interview, the status is changed to "flagged for interview" and moved to the next approver, (as noted in the next section Moving Applicants in the Workflow (Flagging/Requesting an Applicant for Interview).

The "not reviewed, rec'd after consideration date" status should only be used for applicants who applied after the guaranteed consideration date and have not been reviewed for consideration. If someone opens the applicant's materials, the applicant must be rated along with the other applicants, if any, that have applied through the same date.

1. View an applicant (*that has the workflow state as Under Review by Posting Admin*) by individual or bulk view.
    a. **Individual View**: Click on the applicant's last name to **Take Action on Job Application.**
    b. **Bulk View:** To rate applicants in bulk, select applicants by checking the boxes to the left of the applicant's name. Next, click **Actions** to **Move in Workflow** *(if moving in workflow you have the option to select and move individual applicants or you may select and move multiple applicants using the move in bulk option).*
2. Select **Rate Applicant**.
3. Select a **rating/reason** (Qualified 0-5, or Not Qualified) from the dropdown when prompted.
4. Click **Submit**, then you should see a green message appear at the top of your browser once the action was successful. The following will now display near the applicant's name; **Current Status**: Rate Applicant, **Owner**: Posting Admin.

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Moving Applicants in the Workflow (Flagging/Requesting an Applicant for Interview)
After viewing an applicant's materials (application and documents if applicable), the current owner of the applicants can move the applicant in the workflow to either a final status or "flagged for interview" for the next reviewer to approve.

1. View an applicant (that has the workflow state as Rate Applicant) to move in workflow by individual or bulk view.
    a. **Individual View**: Click on the applicant's last name to **Take Action on Job Application**
    b. **Bulk View:** To rate applicants in bulk, select applicants by checking the boxes to the left of the applicant's name. Next, click **Actions** to **Move in Workflow** *(if moving in workflow you have the option to select and move individual applicants or you may select and move multiple applicants using the move in bulk option)*
2. Select **Take Action on Job Application** to view available status options (e.g., Flagged for Interview) (*For a full listing of options, please see the indices below).*
3. Select the state in which to **update the applicant**.
4. Click **Submit**, then you should see a green message appear at the top of your browser once the action was successful. The following will now display near the applicant's name; **Current Status**: {Selected Status}, **Owner**: {Next Approver}.

The HR Liaison will review all interview requests and approve by changing the status of each P&S and Faculty applicant flagged for interview to "HR Liaison Approved for Interview". Once the HR Liaison approves the interview request, the Posting Admin will be notified via a system generated email (Merit applicants flagged for interview will be approved for interview by both HR Liaison and UHR Talent Acquisition (Recruitment)). At this point, the hiring manager/supervisor, or search committee can begin scheduling interviews with approved candidates.

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INDEX: Available Workflow Actions

The following statuses are available for updating the workflow of an applicant. During the workflow, an applicant can be returned to the Posting Admin if the approver finds the applicant unacceptable for interview.

Available Workflow Actions			
Action Label	**Email Action**	**Updated Owner**	**Is Applicant active and under consideration?**
Rate Applicant	N/A	Posting Admin	Yes
Flagged for Interview	Email to Dept Chair/Director	Dept Chair/ Director user	Yes
Flagged for Interview	Email to Dean/AVP user	Dean/AVP user	Yes
Flagged for Interview	Email to President/Senior Vice President	President/ Senior Vice President user	Yes
Request for Interview (**Merit Only**)	Email to UHR Recruit	UHR Recruit	Yes
Return Applicant	Email to Posting Admin	Posting Admin	Yes
Return Applicant	Email to Dept Chair/Director	Dept Chair/Director	Yes
HR Liaison Approved for Interview	Email to Posting Admin	Posting Admin	Yes
Approved for Interview (UHR - **Merit Only**)	Email to Posting Admin	Posting Admin	Yes

INDEX: Applicant Status Options

The following statuses are available for applicants.

Applicant Status Options				
Action Label	*Email Action*	*Updated Owner*	*Is Applicant under consideration?*	*Available Reason Codes*
** Denotes the applicant sees "No Longer Under Consideration" on the applicant portal. An email notification is sent at the time the posting is filled/closed.*				
Application Withdrawn	N/A	Applicant	No	N/A
Does not Meet Required Education and Experience	Email to Applicant, when filled	Posting Admin	No *	• Does not meet education requirement • Does not meet experience requirement • Does not meet license/certification requirement
Does not Meet Required Qualifications - Merit only	Email to Applicant, when filled	Posting Admin	No*	• Does not possess required knowledge, skill or ability • Does not meet required experience or education/training • Does not meet license/certification requirement

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Under Review by Posting Admin	Email to Posting Admin	Posting Admin	Yes	N/A
Applicant Status Options				
Action Label	*Email Action*	*Updated Owner*	*Is Applicant active & under consideration?*	*Available Reason Codes*
Flagged for Interview	Email to new owner	Next approver	Yes	N/A
Request for Interview (**Merit Only)**	Email to UHR Recruitment	UHR Recruitment	Yes	N/A
Not Reviewed – Rec'd after consideration date	Email to Applicant, when filled	Posting Admin	No*	N/A
Interviewed, Not Hired	Email to Applicant, when filled	Posting Admin	No *	• More suitable candidate • Job offer declined • Candidate withdrew
Not Interviewed	Email to Applicant, when filled	Posting Admin	No*	• Applicant withdrew application • Experience less desirable/relevant • Education less desirable • Skill set does not match needs of the position • Conflict of Interest • Quality of professional references • Inaccurate application • No response to email or call • Not available for the required hours of work • Application incomplete or late • Employment History • Did not show for Interview
Not Interviewed – Faculty/Other only	Email to Applicant, when filled	Posting Admin	No*	• Applicant withdrew application • Education less desirable/relevant • Quality of work experience • Quality or relevancy of teaching experience • Quality or relevancy of extension/professional practice • Quality or relevancy of research experience • Quality or scope of grant proposals awarded • Quality or scope of publication record • Conflict of interest • Quality of professional references • No response to email or call • Application incomplete or late

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Withdrawn	N/A	UHR Reruitment	No	N/A
Selected for Hire	N/A	Posting Admin	Yes - *A Hiring Proposal can be started from this status.*	N/A

INDEX: Applicant Status Options for UHR Only

The following statuses are only available for UHR use when updating applicants.

Available Applicant Statuses: HR Use Only				
Action Label	*Email Action*	*Updated Owner*	*Is Applicant active & under consideration?*	*Available Reason Codes*
** Denotes the applicant sees "No Longer Under Consideration" on the applicant portal. An email notification is sent at the time the posting is filled/closed.*				
Hired	N/A	UHR Recruitment	Hired	N/A
Merit Application Not Eligible (contract provision) - Merit Only	Email to Applicant, when filled	UHR Recruitment	Yes	N/A
Merit Transfer not most senior - Merit Only	Email to Applicant, when filled	UHR Recruitment	No*	N/A
Merit Transfer withdrew after deadline but before Offer - Merit Only	Email to Applicant, when filled	UHR Recruitment	No*	N/A
System Det'd Did Not Meet Min Quals** ***If disqualified by posting specific questions*	N/A	UHR Recruitment	No*	N/A
Not Certified - Merit Only	Email to Applicant, when filled	UHR Recruitment	No*	N/A
UHR - Not Approved for Interview (**Merit Only**)	Email to Applicant, when filled	UHR Recruitment	No*	• Applicant withdrew application (please specify) • Experience less desirable/relevant • Education less desirable • Skill set does not match needs of the position • Conflict of Interest • Quality of professional references • Inaccurate application (please specify) • No response to email or call

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				• Not available for the required hours of work • Application incomplete or late • Employment History • Did not show for Interview