University of Idaho

Temporary (Student & Irregular Help) Searches:

Step-by-Step Hiring Procedures using the online Applicant Tracking System

Human Resources

2/10/2009

Table of Contents

UI FACULTY-STAFF HANDBOOK
CHAPTER THREE: 3090
EMPLOYMENT INFORMATION CONCERNING UI EMPLOYEES

TEMPORARY HOURLY EMPLOYMENT

A. Definition and Establishment of Positions. Temporary Hourly (TH) positions are positions in which the employee is compensated on an hourly basis, as the services are needed. Employment can be terminated at will, and the employee has no expectation of continuing employment. This employment category does not include temporary board-appointed positions. [See 3080] *[ed. 7-97, 7-00, 7-02]*

> **A-1.** A TH position is established when there is a temporary or intermittent need for services **not expected to exceed 1385 hours per calendar year**. *[ed. 7-97]*
>
> > **a.** If the temporary services are expected to exceed 1385 hours in any one year, the department administrator **should consider establishing a temporary or continuing board appointed position** [see 3080 for establishing a board-appointed position]. *[rev. 7-02]*
>
> **A-2.** Department administrators are authorized to engage TH employees to be paid from the Department's TH budgets on an hourly basis. *[ed. 7-97, 7-02]*
>
> **A-3.** Deans and directors are responsible to ensure--and are expected to be able to document-- that recruitment, employment, personnel actions and personnel policies for TH employees comply with legal requirements and are conducted in a manner which is consistent with the principles of affirmative action and equal opportunity. Human Resource Services provides assistance in classifying positions, determining compensation ranges, writing job descriptions, recruiting, hiring and verification of I-9 status. *[ed. 7-97]*
>
> **A-4.** Persons employed as TH employees may be terminated without prior notice without cause assigned. The supervisor may give advanced notice of termination when appropriate. *[ed 7-97, rev. 7-02]*

B. Appointments. TH appointments must be entered and approved on the Electronic Personnel Action Form (EPAF) for each TH employee before employment begins. All data requested must be entered on the EPAF screen. *[ed 7-97, rev. 7-02]*

> **B-1.** Each new TH employee must visit Human Resource Services to present information required to document I-9 status and complete payroll, Social Security, tax-withholding, and related documents before beginning employment. Appropriate alternate arrangements are made for persons employed at locations away from Moscow. *[ed 7-97, 7-00]*
>
> **B-2.** Contact Human Resource Services or a current HRS Banner manual for instructions regarding reporting of hours worked. *[rev. 7-02]*

C. Benefits.

> **C-1.** TH employees are eligible only for annual leave, sick leave and pay for holidays on which they do not work [see C-2 below and 3460 D-1-a] and said eligibility is contingent on participation in the Public Employees Retirement System (PERSI, see 3730 for PERSI eligibility). *[ed. 7-97]*

a. Exemption from Social Security taxes for international students enrolled less than full-time or working more than 20 hours per week will be determined based on the visa type and length of stay in the United States. Contact HRS for more information. *[rev. 7-02]*

b. TH employees working at least 20 hours a week for a period of 5 months are required to participate in PERSI. Those not working at least 20 hours a week are ineligible to participate in PERSI. (See policy 3730 for a discussion of PERSI eligibility.) *[ed. 7-97, ed. 7-02]*

c. Department administrators are responsible for notifying Human Resource Services when a TH employee who is expected to qualify for participation in PERSI is hired. Human Resource Services will inform department administrators and TH employees when the TH employee has worked 20 or more hours a week for 4 consecutive months. The notice will explain that the employee is approaching the threshold for PERSI enrollment. The UI may choose from among the following options when this threshold is about to be met: (1) terminate employment, (2) reduce hours to less than 20 hours per week, or (3) enroll the employee in PERSI. *[ed. 7-97, rev. 7-02]*

d. If the employee continues to work 20 or more hours a week (option 3 above) enrollment in PERSI is mandatory, and the enrollment will be retroactive to the original hiring date. When the employee is enrolled, the employing department and the employee are responsible for the appropriate contributions to PERSI from the date of hire. (See 3730 for a complete discussion of contributions.) Employees may be allowed to spread these contributions over a period not to exceed six months.

C-2. TH employees who are paid for 40 or more hours in a biweekly pay period of 80 hours and who work for five consecutive months or longer are required to participate in PERSI and accrue annual leave during the first 10,400 hours of service (five years of full-time work) and sick leave on a pro-rata basis at the rate per hour worked which is represented by the proportion 96/2080. For example, an eligible TH employee who is paid for 62 hours in a two-week pay period accrues 2.9 hours of annual leave and 2.9 hours of sick leave (62 hours times 96/2080, rounded to the nearest tenth of an hour). Sick leave accrual is unlimited; annual leave accrual is limited to 192 hours maximum. *[ed. 7-97, 7-00, rev. 7-02]*

a. Department administrators are responsible for entering into the UI Human Resources Information System (HRIS), the leave taken by TH employees in their respective units. Leave for each biweekly pay period must be entered between the second Friday of the pay period for which leave is being reported, and the following Tuesday before 5 p.m. The reporting day may be altered if affected by closure of UI for a designated holiday or other time constraints affecting reporting requirements. [See 3710 B-6 for leave reporting for board-appointed employees; questions regarding leave should be directed to Human Resource Services.] The assistant vice president for human resources or designee is responsible for monitoring paid leave taken by all UI employees. The provisions of this paragraph apply also to paid sick leave. *[ed. 7-97, rev. 7-02]*

b. If a TH employee obtains a board-appointed position, his or her accrued annual leave may be paid out at the time of the new appointment, or transferred, at the new hiring department's discretion. Sick leave is transferred. *[ed. 7-97, rev. 7-02]*

c. Upon termination or resignation, a TH employee is paid for unused accrued annual leave. All unused sick leave is forfeited when a TH employee is separated from service and no compensation is paid for unused sick leave. If an employee returns to eligible service within three years after separation, any sick leave that was forfeited at the time of separation will be

reinstated. *[ed. 7-97, ed. 7-02]*

    d. Departments are responsible for maintaining accurate annual and sick-leave records for their TH employees and entering the records into the Banner system each pay period. *[ed. 7-97, ed. 7-02]*

D. Restrictions of Use of Grievance Procedures. TH employees do not have access to the grievance procedures outlined in 3860; for matters pertaining to prohibited harassment or discrimination, TH employees should contact the Office of Diversity and Human Rights. *[ed. 7-97, 7-98, 7-00, 7-02]*

E. Employment of Relatives. The policies relating to the employment of relatives [see 6240 B] apply to TH employees. *[ed. 7-97, 7-98, 7-00]*

F. Supervision. The departmental administrator is responsible, subject to any provisions set by the appropriate dean or administrative officer, for the supervision of the employee's work. *[ed. 7-98, 7-00]*

G. STAR AND COMET Program. Departmental administrators seeking part-time, short-term, intermittent or replacement TH clerical or laborer employees are encouraged to contact Human Resource Services regarding the Secretarial Technical Assistance Resource (STAR) program and the Combination of Maintenance Employment Tasks (COMET) program. Individuals in the STAR and COMET programs seek temporary or part-time employment. Completed applications are available for departmental administrators to review. *[ed. 7-97, 7-00, rev. 7-98, 7-02]*

Step-by-Step Instructions for Temporary (Student and Irregular Help) Searches
Hiring Checklist

For questions regarding the hiring process, please **contact Dixie Kearney** at 885-3737 or dixiek@uidaho.edu.

Step 1 Develop or modify position description/ job description (ROJD)	**Your job description may already be in ATS.** I have entered almost all job descriptions from the last two years into ATS. If you have not conducted a search in ATS before or with Human Resources or have made changes to your job description, contact me. I can enter your job description into ATS very quickly.
Step 2 Develop or update your Screening Criteria and Interview Questions	Develop your Screening Criteria and your Interview Questions. You will be pasting these into ATS. If you haven't done this step as part of your TH hiring before, don't worry, it is not difficult and it doesn't take long. Specific instructions are provided.
Step 3 Add Users and Create Announcement	Using Internet Explorer, log in to the Applicant Tracking System (ATS) at http://www.webs.uidaho.edu/AppTrack/agency/login.asp. Add or authorize search committee members (if you have one) as Users and create your announcement.
Step 4 Review/Rate Applications	Screen/rank applications using your criteria from Step 2 based upon the qualifications of the position. Save this documentation as part of your hiring records.
Step 5 Select Interview Candidates	Enter job-related reasons into ATS explaining why the search committee will (and will not be) interviewing the applicants.
Step 6 Select Finalists	Enter job-related reasons into ATS explaining why the search committee would like (and would not like to) offer to a candidate.
Step 7 Notify Applicants	All unsuccessful applicants should be notified regarding the search. ATS applicants may be notified through mail or email. See sample letter attached.
Step 8 Complete EPAF	An Electronic Personnel Action Form (EPAF) must be completed for all new employees to enter job information into Banner Payroll system.

NOTE: All of the search **paperwork including but not limited to applications, rating forms, interview questions and comments, job descriptions, job postings, advertisement locations, notes, etc.,** by the hiring department **for a minimum of 3 years**.

Step-by-Step Instructions for Temporary (Student and Irregular Help) Searches
Step 1 – Develop or Modify Position Description/Job Description (ROJD)

1. Please contact Dixie Kearney for assistance at 885-3737, dixiek@uidaho.edu. See below for a sample TH job description.

TITLE: Clerical Assistant I

MAJOR FUNCTION:
Perform routine office support duties for Human Resources involving working with files, automated systems, computer records system maintenance, and/or word processing software.

RESPONSIBILITIES:
The University of Idaho does not discriminate against an individual with a disability in regard to job application procedures, the hiring or discharge of employees, employee compensation, advancement, job training, and other terms, conditions, and privileges of employment. Based on this commitment, various job duties on the job description have been analyzed to be *essential* to this position. Employers can continue to require *all* applicants and employees, including those with disabilities, to be able to perform the essential, non-marginal functions of the position. Reasonable accommodations may be provided to employees with disabilities to enable them to perform the essential elements of this position. Marginal job functions are ones that an employer may transfer to other individuals or not require to be performed by an individual with a disability. It is the responsibility of any applicant or employee with a disability to inform the Human Resource employment specialist that an accommodation is needed either to complete application procedures or to perform the duties of the position.

Responsibility	% of Time	Essential/ Marginal
Assist with office support functions by: filing; answering business telephone; checking, proofing, sorting, or coding information or documents; making photocopies; running errands; greeting customers and providing routine information; using word processing software; maintaining files, record systems and databases; generating reports from computerized databases; data entry.	90	E
Contributing to team effort by: performing related tasks and other duties as assigned.	10	M

MINIMUM QUALIFICATIONS:
Some knowledge of: general office support duties including faxing, filing, answering business telephone; checking, proofing, sorting, or coding information or documents; making photocopies; using word processing software; maintaining files, record systems and databases; data entry.

Must possess: attention to detail; ability to maintain accuracy while performing repetitious tasks; ability to maintain confidentiality; ability to work cooperatively with others in a busy office environment.

DESIRABLE QUALIFICATIONS:
Experience: working in an office.

Step-by-Step Instructions for Temporary (Student and Irregular Help) Searches
Step 2 – Develop your Screening Criteria and Interview Questions

Once your Job Description is complete, you can use it to help you develop your screening criteria and interview questions. You are looking for the most qualified person for the job so your screening criteria must come from the minimum and desirable qualifications listed on your job description. Simply copy and paste them onto another page and make sure you and/or your committee have a place to rate them. You will also need to determine what your rating scale will be. See example below.

_____

SAMPLE SCREENING/RANKING FORM
Clerical Assistant I

APPLICANT'S NAME _____

Rate applicant's knowledge, skills and abilities based on the qualifications of the job description/ announcement.
RATING SCALE

5	Significantly exceeds criterion
4	Exceeds criterion
3	Solidly meets criterion
2	Does not solidly meet criterion
1	Does not significantly meet criterion
0	Does not meet criterion or does not address qualification (a score of 0 on any of the minimum qualifications will 'fail' the applicant from further consideration)

MINIMUM QUALIFICATIONS:
Some knowledge of:
general office support duties including faxing, filing, answering business telephone;   _____
checking, proofing, sorting, or coding information or documents;   _____
making photocopies;   _____
using word processing software;   _____
maintaining files, record systems and databases; data entry.   _____

Must possess:
attention to detail; ability to maintain accuracy while performing repetitious tasks;   _____
ability to maintain confidentiality;   _____
ability to work cooperatively with others in a busy office environment.   _____
Total Minimum Qualification Ranking Points   **_____**

DESIRABLE QUALIFICATIONS:
Experience: working in an office.   _____

Total Additional Desirable Qualifications   **_____**
Total Ranking Points   **_____**
Comments_____
_____

Evaluator's signature_____ Date_____

Screening Tips:
- To have something to screen on, you need to give applicants an opportunity to explain how they meet your qualifications. You can ask for a resume, references, letter of qualification or supplemental questionnaire. In particular, a letter of qualification or supplemental questionnaire asks applicants to actively address how they meet each qualification.
- If you have received many applications and you have a committee, designate one person to review all of the complete applications and make a recommendation to the committee the applicants, based on scores, to consider further. The entire committee can then review a fraction of the applications and save time.

Developing Interview Questions

You probably have a list of standard questions you have asked candidates before. Here are a few things to consider:

- Make sure your questions are legal. Improper questions include the church they attend, whether they are married or have children, father's surname, how long they have lived at their residence, etc. To review additional improper questions, please visit the Human Resources website at www.hr.uidaho.edu or contact me for assistance.

- Choose questions that will address their interest and qualifications for the position. Some good ones include: What prompted your decision to apply for this job? What kind of job duties are you interested in? What is most important to you in a job? For more sample interview questions, please visit www.hr.uidaho.edu or contact me for assistance.

- If you have a "Physical ability to:" in your minimum qualifications, you should follow up with interview questions to confirm that the candidate can fulfill the requirement.
  Example: the Minimum Qualification is Physical ability to: lift, carry, and lift items overhead up to 25 pounds regularly. **Your question could be:** "This position requires the ability to lift, carry, and lift items overhead up to 25 pounds regularly-are you willing and able to fulfill this requirement?"

- Keep notes of your interviews as you will need to report why you would like to offer the position to the person(s) you choose.

Important: Any documentation related to an employment search must be kept in an accessible place for at least 3 years from the date of hire or the last date you did anything with the search if no hire was made. ATS saves most of this for you, however, completed screening forms or forms with rankings and comments should be kept by the department in a central location.

Step-by-Step Instructions for Temporary (Student and Irregular Help) Searches
Step 3 – Add Users and Create Announcement

Please note: you may click 'Delete Search' at any time to delete the announcement when the announcement is in draft form.

1. Contact your Affirmative Action Coordinator (AAC) for access and training in using ATS. If you are not sure who your coordinator is, visit www.hr.uidaho.edu/employment under Affirmative Action Coordinators. The one for your area should add you as a search chair/designee if you will be creating the announcement.

2. Log in to the Applicant Tracking System (ATS) by going to the Human Resources homepage, www.hr.uidaho.edu, then clicking on "Departmental Login". You will log in using a user id and password that are sent via an e-mail from employment@uidaho.edu.

3. Select **'Announcements'** from the menu across the top of the screen.

4. There will be a link at the top of the screen that says 'Create New Announcement', click it.

5. You will perform a search for the position you are posting by entering the title number (which can be found on the approved ROJD you will be using) or typing the title name (or a portion thereof) and click 'Search'. **TH titles begin with a 2.**

    Please note: The % may be used as a wildcard at the beginning of the title. A wildcard is automatically assumed at the end of the title. EX: Typing "%Program" will provide "Program Coordinator" and "Program Manager" among the results. Typing "Administrative" will provide "Administrative Assistant 1" and "Administrative Assistant 2" due to the automatic wildcard at the end of the query.

    The position title, title number, pay grade, occupational category, etc. will flood into announcement details.

6. Select **'Create'** to save the selected announcement. Now you will need to enter the information that is specific to the position you are recruiting for.

7. Go to the **'Announcement Details'** section and choose **'Location'** from the drop-down menu if other than Moscow, which is the default. Nearly all of the possible locations for UI jobs are listed, should you not see the one you need, please let Human Resources know and it can be added.

8. Classified will flood into the **'Occupational Category'** field.

9. The class title will also be pre-set. Below the Class Title, you will see a link that says **'Required Documents'**. The Required Documents include the information referenced below. You may type directly into the notes section or paste text from a word processing program (recommended). **Remember to click the "update" button to save your documents before closing each of the notes.**
    The notes within Required Documents are:
    - **Search committee members** – Recommended but not required for TH positions. List your search committee members' names, indicate if they are Search Committee Members,

Chair, or ex-officio include the name of their department or place of business (off-campus), gender, and work title. The FSH recommends that the committee be made up of at least 3 members. The committee should have both male and female members. If a subset of the committee will conduct the initial screening, the committee members conducting the screening should be noted in this section.

- **Interview questions** – Type/paste your interview questions in this section. Interview questions should be job-related and not personal in nature.
- **Screening form** –Type/paste your screening form into this area.
- **Advertising** – If desired, specify newspapers, publications, online distribution lists, etc., to place advertising. Include the dates the ads are to run, budget number to charge, ad copy (or we will create one for you). For questions about advertising contact Human Resources. We can suggest places to advertise create ad copies and facilitate ad placement at no extra charge to your department. We also have contracted and/or free sites in which we can post your position.
- **Additional Notes** – As the search is on-going add notes into Required Documents for, reference questions or if additional application materials are desired. Any e-mails sent to applicants for notification purposes can be saved as notes as well.

10. Review the amount in the **'Pay Grade'** box, the allowable range amount from the pay level associated with the job title will have flooded in.

11. The **'Working Title'** is optional. A working title would be used in addition to the class title to advertise the position.

12. Select 'Full, Part Time or Depends on Experience' from the drop-down menu.

13. Review **'Shifts/Period'**. If applicable, indicate hours per week, specific shifts, 10-month appointments, or any other variation deemed important. If the position works the standard University hours of operation, it is not necessary to specify the shift. This area can also be used to clarify the number of hours the position will work if it is a part-time appointment.

14. Specify the **'Proposed Opening Date'** from the drop down menu. It will flood in as the date the announcement is created. This date will be revised to reflect the date the position is actually posted online.

15. Identify the **'Proposed Closing Date'**. Classified positions must be posted for 10 working days. In order to post a position for a shortened period, an exception must be approved by the Human Rights Compliance Officer. The date entered will be revised at the time of posting to ensure that the announcement is posted for the required 10 working days, or period approved by the HRCO.

16. Select the desired application materials required from each applicant:

- **'Resume Requested'**
- **Letter of Qualification'**
- **'References Requested'** – This will prompt applicants to provide information about their professional references. Should you wish to request letters of reference, specify in the Notes/Misc field down at the bottom of the announcement (see reference below).
- **'Questionnaire Requested'** - Because it is difficult to view the questionnaires listed in the "Questionnaires Associated with this Class" section, just click the Questionnaire Requested

check box and Employment Services will ensure that the questionnaire that is attached is one that matches the Minimum Qualifications for this specific position. If you have specific requests for a Questionnaire, you can enter your request on a new note in the Required Documents section. Employment Services will be in contact with you should there be any questions or concerns regarding your request.

17. Click **'Update'** to save your work so far. As with any computer program, clicking "Update" often as you are creating your announcement ensures that your changes will be saved and your work will not be lost.

18. Go to the **'Announcement Text'** section and copy and paste from the approved ROJD:
    - Major function
    - Responsibilities
    - Minimum qualifications
    - Desirable qualifications

19. Click 'Update' to save your additions to the Announcement Text area.

20. Should you have any additional information that you would like your AAC, the HRCO or Human Resources to be aware of, that information can be entered by creating a note in the **Notes/Misc** section of the announcement.

21. ******See below for instructions on how to add and authorize users to view your search.******

IMPORTANT: View and proofread the announcement the way applicants will see it online by clicking on the **'Announcement Draft'** link, located above Announcement Details. The announcement draft is created through the announcement details section and the announcement text. The information you entered into the tables merges together to create your announcement draft.

Adding Users to View Your Announcement

1. Once you are within the announcement for the position you are posting, you can add users to give them access to view the announcement (and of course the applications when the time comes).

2. As a Search Chair/Designee you will only add or authorize those that will be serving on a search committee. You will need to search **'Users'** for each person you would like to authorize for your search to see if this person is already a user in the ATS system. All users will only have ONE user account but can be assigned to different jobs using that one account. You can search by department to see a grouping of people in that department or by typing their name or email address in the **'Find User'** area—see screen shot below. A user may not show up under their department if they were added by another department as a user so your best results will come from the **'Find User'** function. If there is a listing for the person, you do not need to add them as a user to assign them to a search. If they do not show up in the **'Find User'** search, you will need to add them.

User Maintenance

You may search for users in ATS using the following 2 methods:

Department:
Choose a department from the drop-down list to view all users in that department.

Human Resources

Find User:
Type in the first and/or last name, userid, or email of a user to find any user in ATS.

[Search]

To create a new user account in ATS, click on the **New User** button.

[New User]

Users in Human Resources

To change a user's information in ATS or enable/disable departmental access, click the **Edit** button to the right of the user.

Name	UserID	Dept	Email	Action
Admin 1, HR	hradmin1	Human Resources	hradmin1@uidaho.edu	[Edit]
Admin 2, HR	hradmin2	Human Resources	hradmin2@uidaho.edu	[Edit]

3. To add/create a new user account, click on the **'New User'** button. This brings you to the **'Create User'** area. Complete the requested information—see screen shot below.

User Information

Edit the user's information in the fields below. Fields with a red asterisk (*) next to them are required.

When creating a new user, make sure that the user does not already exist in ATS under another department. If you are unsure, click **View Users** and use the **Find User** function to search for the user by name or email before attempting to create a new account.

Note: You will be able to specify a new user's permission levels after the user account is created.

First* 　　　　M.I. 　　　　Last*

Mailing Address 　　　Mailing City / State 　　　Mailing Zip Code (00000)

Phone (000)000-0000 and Extension 00000 　　User ID* 　　　Email*

Fax (000)000-0000

Status
Active

Department
Human Resources

[Create] [View Users]

Authorizing Users to View the Announcement

1. Go through the steps you normally would to create an announcement. Once you have clicked on the 'Create' button in the announcement then click on 'Authorize Users' which will bring you to the 'User Maintenance' page. Search 'Find User' to bring up the person's name, then click 'Authorize' to the right of their name and they will be added to your search.

2. If you have authorized a user to your search by mistake or need to remove them just click **'Delete'** to the left of their name—see screen shot below.

Users Authorized to View this Announcement			
Action	User ID	Name	Department
Announcement Originator	hr2	HR, Test2	Human Resources
Delete User	dwillis	Willis, Dayna	Animal & Veterinary Science

Authorize Users

Back to Top

Request Approval to Recruit

1. To request approval of your announcement, select **'Request AA Coordinator Approval'**

2. If your announcement is returned for correction, you will receive an e-mail message from employment@uidaho.edu notifying you that your request to recruit has been returned. The returned announcement will be in your **'Tasks'** menu or you may access it through the **'Announcements'** menu under **'Announcements Returned'**. Click on the announcement and read the **'Notes/Misc.'** area for who returned the announcement and the reasons it was returned. Make the requested changes, document your actions/date/contact information and resubmit for approval.

4. When approved by your AAC and posted by ES, you may view the announcement on the HR website by visiting www.hr.uidaho.edu, clicking on "Current Job Openings", then on Temporary. Please note that an e-mail notification is not sent when announcements are posted to the Human Resources website.

Step-by-Step Instructions for Temporary (Student and Irregular Help) Searches
Step 4 – Review Applications

1. Using your screening/ranking form, you (and your search committee) may begin screening/ranking completed applications as applicants complete them. Just log in to ATS and click on Announcements, your job title and then the applicant's name to bring up the applications. Keep in mind that the applicants may change their application materials until the position is closed. ATS will flag their application in red if they have changed something – please re-screen the section(s) indicated. You are not able to add Screening, Interview or Offer Notes until the job is closed.

2. If you did not list a specific closing date in your announcement and you have already posted the position for three days or received more than 20 applications you may email or call Dixie to close your announcement. Once closed, you may use ATS to document your search.

3. After the job has closed, log into ATS and Click on the **'Tasks'** menu and scroll down to **'Applications Ready for Review'** and click on your announcement title.

4. Scroll down to the **'Applicants Who Applied Online'** area and click on the applicant's name to bring up their application materials. Beneath this area is the 'Manually Entered Applicants' section and may contain applicant names you are not able to click on. These are applicants who have submitted paper application materials-we have forwarded the materials to you.

5. Click **'Fail'** next to the applicants that have only 'Started' but not 'Completed' their application. In the 'Screening Notes' area next to their name type "Incomplete Application".

6. Use your (and the committee's) screening/ranking forms to provide the following information. Click **'Fail'** next to the applicants that did not pass all of the minimum qualifications listed on your screening form. Repeat actions of #6 to type in "Did not pass Minimum Qualifications" in the **'Screening Notes'**. Click **'Pass'** next to the applicants that have passed all of the minimum qualifications listed on your screening form. In **'Screening Notes'** type "Passed Minimum Qualifications". **Be sure to click on the 'Update' button at the bottom left of that table to update all of your notes BEFORE moving on to another section/table. If you click in another table without clicking 'Update' first, all information you input will be lost.**

7. If your committee does not find a suitable number or acceptable quality of candidates, you may click the **'Request to Extend Search'** button. This will send a request to your AAC then me to extend the search-please document your reasons for extending the search in the **'Notes/Misc.'** area. Once approved, the announcement will be reposted.

8. You may click **'Cancel Search'** at any time to cancel the search due to lack of funding, etc. Please document the reason for canceling the search in the **'Notes/Misc.'** area.

Step-by-Step Instructions for Temporary (Student and Irregular Help) Searches
Step 5 – Select Interview Candidates

The search committee chair or designee must enter job-related reasons into ATS explaining why the search committee will or will not interview each passed applicant.

1. Log into ATS if you are not already, click on the **'Tasks'** menu and scroll down to **'Applications Ready for Review'.** Click on your job title.

2. In the **'Interview Notes'** area, indicate whether you request to interview each applicant by choosing **'Yes', 'No',** or **'Reserve'** from the drop down box to the right of the **'Interview Notes'** section.

3. Using the completed screening/ranking forms and notes from the committee, document in the **'Interview Notes'** area the reasons why you would like to interview, not interview, or reserve the right to interview if necessary. See example below.

Action	Name
Update Applicant	Boman, Bobbie M
Screening Notes:	Passed Minimum Qualifications
Interview Notes:	Candidate has 2 years (15 hours per week) experience working in a busy office; application and work history demonstrates attention to detail **Yes**
Offer Notes:	
Rank:	
Update Applicant	Johnson, Jamie M
Screening Notes:	Passed Minimum Qualifications
Interview Notes:	Candidate has little knowledge of office support functions **No**
Offer Notes:	
Rank:	
Update Applicant	Healy, Cynthia R
Screening Notes:	Passed Minimum Qualifications
Interview Notes:	Candidate has 6 months of office experience at 3 hours per week; has experience working cooperatively with others as a Resident Assistant **Reserve**
Offer Notes:	
Rank:	

4. Click **'Update Applicant'** after adding notes to the candidate. When finished entering Interview notes for candidates, scroll down and click the **'Update'** button.

5. Proceed with setting up and conducting interviews.

Step-by-Step Instructions for Temporary (Student and Irregular Help) Searches
Step 6 – Select Finalists

The search committee chair or designee must enter job-related reasons into ATS explaining why the search committee would like to offer the position to a candidate(s).

1. Using Internet Explorer, log in to http://www.webs.uidaho.edu/AppTrack/agency/login.asp or refer to number 2 below if you are already logged in.

2. Click **'Yes'** or **'No'** by each interviewee's name to indicate your intent to offer.

3. Using the search committee's documented comments from the interviews, complete the **'Offer Notes'** area with supporting documentation why (if 'Yes' was selected) or why not (if 'No' was selected) you request to offer the position to each candidate that you interviewed. See example below.

Action	Name
Update Applicant	Boman, Bobbie M
Screening Notes:	Passed Minimum Qualifications
Interview Notes:	Candidate has 2 years (15 hours per week) experience working in a busy office; application and work history demonstrates attention to detail **Yes**
Offer Notes:	Candidate has excellent knowledge of and experience in office support functions; gave several examples in interview; references were excellent
Rank:	1
Update Applicant	Johnson, Jamie M
Screening Notes:	Passed Minimum Qualifications
Interview Notes:	Candidate has little knowledge of office support functions **No**
Offer Notes:	
Rank:	
Update Applicant	Healy, Cynthia R
Screening Notes:	Passed Minimum Qualifications
Interview Notes:	Candidate has 6 months of office experience at 3 hours per week; has experience working cooperatively with others as a Resident Assistant **Reserve**
Offer Notes:	Would like to reserve the right to conduct an interview, check references and maybe offer if the first candidate is unavailable
Rank:	

4. Type 1st, 2nd, 3rd, etc., by each 'Yes' candidate in the **'Rank'** area to indicate the order you will offer the position.

5. Scroll down and click **'Update'.**

6. Scroll down and click **'Request Permission to Offer'.**

7. If your committee does not find a suitable candidate, you may click the **'Request to Extend Search'** button. This will send a request along the queue to extend the search-please document your reasons for extending the search in the **'Notes/Misc.'** area. Once approved, the announcement will be reposted.

8. You may click **'Cancel Search'** at any time to cancel the search due to lack of funding, etc. Please document the reason for canceling the search in the **'Notes/Misc.'** area.

9. Once your AAC has approved your Offer Request, you will receive an email notification and you may offer the position to the candidate(s) indicated. If you do not receive an email in a reasonable amount of time, check back in your **'Tasks'** menu to see if your request has been returned for correction in the **'Offer Requests Returned'** area. If so, click on the announcement and read the **'Notes/Misc.'** area for reasons it was returned and proceed accordingly.

10. If the job requires the employee to drive a University vehicle you will need to complete a driver check on them before allowing them to drive. Please visit the Risk Management website at http://www.webs.uidaho.edu/riskmanagement/driversrecords.htm to download the forms.

11. Is this position subject to a criminal background investigation? Visit http://www.webs.uidaho.edu/apm/table_of_contents.htm of the Administrative Procedures Manual 50.16 for policies, job titles to check, and forms. If required for the position, a satisfactory background investigation must be received before the person begins working.

12. If this position requires the employee to possess a CDL as part of their job duties, they may be subject to a pre-employment drug test as well as placed on the random drug testing list. Contact Human Resources with questions.

13. If you employ a minor (someone under the age of 18) you will need to ensure the minor visit Human Resources **prior to beginning work** to complete a Child Labor form and present appropriate certificate of age documentation. They will begin the form, submit it to their supervisor to complete and sign, have their parent or legal guardian read and sign it, and return it to Human Resources **before** beginning work. Visit www.hr.uidaho.edu under Forms and Files on the menu (Student and Temporary) to download this form.

Please note-If you choose to contact references as part of your finalist review, visit www.hr.uidaho.edu and download the sample Telephone Reference Check Form to help you stay consistent and give you some ideas. Be sure to keep this on file with the rest of your documentation.

Step-by-Step Instructions for Temporary (Student and Irregular Help) Searches
Step 7 – Notify Applicants

The hiring department should notify all unsuccessful applicants. Notifying candidates of the status reduces phone calls our office and your office receives about the status of the position. In addition, responsiveness will help with your future recruitment efforts. Please use the sample letter below.

_____

Date

"First Name" "Last Name"
"Address"
"City", "State" "Zip"

Dear "First Name":

Thank you for applying for the "Position Title" with "Your Department" at the University of Idaho. Applications were received from a number of highly qualified individuals and careful consideration is given to each applicant. You are not among the candidates selected for further consideration, however, we appreciate your interest in employment at the University of Idaho and hope you will continue to apply for positions for which you have an interest.

Sincerely,

"Your name"
"Your dept"

Step-by-Step Instructions for Temporary (Student and Irregular Help) Searches
Step 8 – Complete EPAF

- An Electronic Personnel Action Form (EPAF) must be completed for all new employees to enter job information into Banner Payroll system.

- To complete an EPAF for your new employee, you must first make sure they have completed the necessary paperwork such as an I-9, W-4, etc., at Human Resources. HR then enters the information into Banner so you can initiate the EPAF. If the person you are hiring has worked for the University of Idaho within the last 3 years (excluding non-citizens) then they do not need to complete a new I-9 form but may wish to change the withholdings on their W-4, indicate a name change, or Direct Deposit change. If they would like to update this information they can come to HR at 415 W. 6th St. (next to Taco Time). Please direct questions about I-9s, W-4s, etc. to 885-3613.

- If you are not sure if they have worked for the UI before you can check in Banner (if you have taken HR Query before). See instructions below:

    1) Log into Banner and go to PEAEMPL.

    2) Enter their ID and page down. If you receive an error message, they have not worked for UI before and need to come to HR.

    3) If their info comes up, choose 'Regulatory Information' from the 'Options' menu. To the right side of the screen, check the 'Date' field.

    4) If it is within the past three years AND they do not have anything in the 'Expire' field, then they DO NOT NEED a work authorization card. They can update their Direct Deposit or W-4 withholding information at HR if they wish.

- Contact HR at 885-3728 if you have questions on putting on an EPAF.

Instructions For Your Search Committee Members
Step-by-Step Instructions

Getting access:
You will receive an email with your user ID and initial password when the search committee chair begins an announcement and adds you to the committee.   You may log in to change your password by accessing the 'Change Password' function.

Reviewing applications:
1. Using Internet Explorer, log in to the Applicant Tracking System (ATS) at http://www.webs.uidaho.edu/AppTrack/agency/login.asp from any computer with internet access.

2. Select **'Announcement'** from menu. Click the announcement title for which you wish to review applications.

3. You are now in the 'Applicants Who Applied Online' section. Using your screening/ranking form (obtained from your search coordinator/chair), you may begin screening/ranking completed applications. Just click on the applicants' names to bring up their applications. You may print the application materials if you wish. Keep in mind that the applicants may change their application materials until the position is closed. ATS will flag their application in red if they have changed something – please re-screen the section(s) indicated.

4. Check the next section titled 'Manually Entered Applicants'. This shows the applicants that submitted their applications in paper form so you will not be able to click on their name to see their material-we have forwarded these to your Search Coordinator/Chair.

5. Use your paper screening form to screen/rank all applicants on the Minimum and Desirable Qualifications.

6. Submit your paper screening/ranking forms to your Search Coordinator/Chair.

Glossary of Menu Screens

TASKS Screen:

- **New Announcement Drafts:** These are jobs within your department for which the announcement has been started, but not yet submitted to your AA Coordinator for approval. You must click the **'Request AA Coordinator Approval'** button for the status to change from 'draft' to 'requested' so the AA Coordinator may approve the announcement and forward to the HRCO for approval and to Human Resources for posting.

- **Announcements Returned:** These are announcements submitted for approval and returned for correction from one of the following queues: AA Coordinator or the HRCO. Comments pertaining to the items requiring correction will be entered under Notes/Misc just below the Announcement Text. Please respond in the notes section with the corrective action taken.

- **Applications Ready for Review:** Applications will be marked "Ready for Review" by Human Resources after the closing date. All online applications received (both started and complete) will be available for screening. Names of applicants submitting paper applications will need to be entered in this screen.

- **Interview Requests Returned:** The request to interview has been returned for correction from one of the following: AA Coordinator or the HRCO. Comments pertaining to the items requiring correction will be entered under Notes/Misc. just below the Announcement Text. Please respond in the notes section with the corrective action taken.

- **Interview Requests Approved:** The AA Coordinator and the HRCO reviews reasons listed for the list of applicants to be interviewed and approve the request.

- **Offer Requests Returned:** The request to offer has been returned for correction from one of the following: AA Coordinator or HRCO. Comments pertaining to the items requiring correction/clarification will be entered under Notes/Misc. just below the Announcement Text. Please respond in the notes section with the corrective action taken.

- **Offer Requests Approved:** The AA Coordinator and the HRCO reviews reasons listed for the list of applicants to be interviewed and approve the request.

USERS Screen: Shows users within the department and their email address. This level may add/delete Level 1 users (search committee members) and email users.

CHANGE PASSWORD Screen:
  o Allows user to change their password.+

ANNOUNCEMENTS Screen:
- **All Active Announcements:** These are current announcements for the Department displaying the announcement's queue status from draft form through completion
  Definition of terms within the announcement:
  o **Announcement:** Shows the job title and an automatically generated job number. When you click on the generated number you will be taken to the job announcement.
  o **Queue:** The virtual location of where the announcement is located and waiting for action. Includes Closed, Posted, Approved by HRCO, Returned by AA Coordinator, etc. Each

queue is color coded for ease of use. The color code bar is located at the top of the announcements screen (white = Search Coordinator, blue = AA Coordinator, pink = Human Rights Compliance Officer, green = Human Resources)

- o **Open/Close Date:** The date the position was posted and the closing date
    - ▪ Number of Completed Applications: The number of completed applications received electronically to date.
- **All Completed Searches:** These are searches for the Department that have been completed and closed by the AA Coordinator. No further action is required.
- **All Cancelled Searches:** These are searches that have been cancelled after the hiring process had begun.

SIGN OUT Screen: Sign out to properly close session.

Glossary of Terms

Term	Definition
Affirmative Action Coordinator (AAC)	Each area within the University has an affirmative action coordinator. The coordinators are trained to (a) explain affirmative action requirements to members of search committees and others who express interest or concern, (b) help search committees develop the required documentation for recruitment and screening procedures, and (c) brief Human Resources, as appropriate, on issues that arise during the search process related to affirmative action and equal opportunity employment. (FSH 3065, B-5)
Announcements	Lists all the job vacancy announcements for your department.
ATS DEPT LEVELS:	
Search Committee Member	This level may view created announcements, view and email ATS users within the department, and view approved hiring lists.
Search Committee Chair	This level may create and view announcements, view and email ATS users within the department, and add/delete level 1 search committee members or designees.
Affirmative Action Coordinator	This level may create, view, and approve announcements, email ATS users or change/ delete ATS user levels within the department, view hiring lists, and view comments at Interview and Offer stages.
Hiring List	This is a list of qualified applicants who meet minimum qualifications. After the hiring list has been approved by Human Resources, the application materials are ready to be viewed electronically in ATS. Those not received electronically in ATS need to be copied and reviewed by the committee and the names only will be added to the list of applicants.
Human Rights Compliance Officer (HRCO)	Human Rights Compliance Officer, reports directly to the President of the University of Idaho. This position is responsible for all ensuring affirmative action guidelines are followed and that a diverse pool of applicants was sought.
UI Only Search	A search that is open to current University of Idaho employees only. Requires approval from the Human Rights Compliance Officer at hrco@uidaho.edu
Open Competitive Search	A search that is open to all applicants and is publicly advertised for an appropriate time period to allow applicants equal opportunity to apply.
Required Document	The documents section, located in the announcement screen below the job title must contain the committee members, interview questions, advertising requests/ information and screening form. These documents must be listed individually.
Search Coordinator Search Chair	The chair of every search committee should be familiar with the Affirmative Action and Equal Employment Opportunity requirements of the University of Idaho and consult with Human Resources for assistance with how to conduct a search to maximize the potential for attracting a diverse pool of applicants. The search coordinator/ search chair retains all hiring records, including job advertisements, applications and resumes, selection forms, minutes of meetings in which applicant's qualifications are discussed,

letters of reference, and interview notes for five years from date of hire or cancelled search. (FSH 3085, A-1)(FSH 3065, C-3)

Tasks The Tasks screen shows the 'to do' list for your level. These are items that require action by appropriate department level.

Update Allows the information to be saved. It will be necessary to click the update key any time a change has been made to the announcement.

Users Authorized users for your department. Affirmative Action coordinators add/delete/change user access within their responsibility center. Level 2 Search Committee Chairs or designees may add/delete level 1 user (committee members).

Q: Must I post my Temporary (Student or IH) position using ATS or even post it at all?

A: The UI Faculty Staff Handbook Chapter 3 Section 3090 addresses hiring temporary employees (student hiring is considered temporary hiring), specifically A-3 addresses the responsibilities of the department. "**A-3.** Deans and directors are responsible to ensure--and are expected to be able to document--that recruitment, employment, personnel actions and personnel policies for TH employees comply with legal requirements and are conducted in a manner which is consistent with the principles of affirmative action and equal opportunity. Human Resource Services provides assistance in classifying positions, determining compensation ranges, writing job descriptions, recruiting, hiring and verification of I-9 status."
If you do not choose to use Human Resources (ATS) to post your position, you are still responsible for complying with this policy including retaining all search records/documentation for five years as is recommended by the University of Idaho's Human Rights Compliance Officer.

Q: How will posting my student and temp positions through ATS help me?

A: A few benefits to using our new online posting and applicant tracking system include: assisting you in complying with UI job posting policies and procedures; electronically retaining your search information; and enhancing your applicant pool-many people have been eagerly awaiting the ability to submit their application online.

Q: Must I have a search committee?

A: The Human Rights Compliance Officer for the University is not requiring student or temporary searches (with the exception of temporary faculty or lecturers) to have a search committee. If you are coordinating the search, please list your name in the search committee area.

Q: Do I need to advertise my student or temporary position?

A: The Human Rights Compliance Officer is not requiring student and temporary positions be advertised in newspapers, online journals, etc. If you post your position with Human Resources, your position will be advertised for free on our website, in the Register (temporary positions) and in the Argonaut Classifieds (student positions-space permitting). If you would like additional advertising, please complete the 'Advertising' section under 'Required Documents' with the publications as well as your budget number.

Q: Do I need interview questions and screening forms for student and temporary positions?

A: The screening form and interview questions are documentation that you should use/keep whether or not you are using ATS to post your position. This information is used to assess and document the qualifications of your applicants.

Q: Can I hire my son/daughter/relative since it is only an IH position?

A: The Faculty Staff Handbook policy below includes student and temporary positions.
CHAPTER SIX: 6240, OTHER GENERAL INSTITUTIONAL POLICIES
B. EMPLOYMENT OF RELATIVES. No UI employee may function as judge or advocate in specific situations involving members of his or her immediate family (such as the employee's spouse, child, parent, grandparent, brother, sister, mother-in-law, father-in-law, son-in-law, or daughter-in-law). Members of the faculty or staff should neither initiate nor participate in institutional decisions involving a direct benefit (such as initial appointment, retention, promotion, salary, or leave of absence) to members of their immediate families.

Q: How long must I post my Temporary (student or IH) position?

A: IH positions are required to be posted for a minimum of three days or until 20 completed applications are received **and** the closing date has not been specified in the announcement.

Q: Who gives me access to the Applicant Tracking System?

A: Human Resources gives access to Affirmative Action Coordinators (AA Coordinators). The AA Coordinators give access to departmental users. The chair or designee can give access to the committee

members for their searches.

Q: What are the responsibilities of the Search Committee Chair?
A: The chair of every search committee should be familiar with the Affirmative Action and Equal Employment Opportunity requirements of the University of Idaho and be the person in contact with Human Resources regarding all search matters. The search committee chair retains all hiring records, including job advertisements, applications (including all requested application materials that have been received from applicants), screening forms, minutes of meetings in which applicant's qualifications are discussed, notes taken during reference checks, and interview notes for a recommended five years from date of hire or cancelled search. (FSH 3085, A-1)(FSH 3065, C-3)

Q: What do I do if I forget my password?
A: You can retrieve a forgotten password by clicking the "Forgot your password?" link on the ATS log-in page. An e-mail will be sent to the account you used when setting up your account. Should you not receive an e-mail or encounter a problem, please contact Human Resources.

Q: How do I let you know where and when I would like to advertise my position?
A: The "Required Documents" section at the top left of the Announcement form is where you will include the newspapers, publications, websites, dates we should advertise, ad copy, and your departmental budget number to charge for the ads. Note: If requested, Human Resources will create the ad copy. HR can also provide some recommendations of where to advertise the position.

Q: How do I submit my Screening Form and Interview Questions?
A: The "Required Documents" section at the top left of the Announcement form is where you will include your screening form and interview questions. Each will have a separate page; you may copy and paste into these areas.

Q: Why is it important to complete my search in ATS? It doesn't hurt anything to leave it sitting there incomplete, does it?
A: Completing searches is an important step. In addition to cleaning up your queue, this very small step is critical to connecting the applicant and hire data together for the Human Rights Compliance Office (HRCO) reports required by the federal government. Entering the EPAF number and clicking the "Complete Search" button will complete the information necessary for these reports.

Q: What am I required to receive from applicants who submit paper applications in order to consider them for the position?
A: When an applicant indicates that he or she would like to submit a paper application, go to the Human Resources website at www.hr.uidaho.edu, then click on forms/files on the menu going down the left side of the page. Click on alphabetical listing, then on Employment Application. This will ensure that the applicant fills out the most recent revised UI Employment Application. The applicant will also be required to submit the requested application materials (could be a resume, letter of interest, letter of qualification or answers to a questionnaire). All of these need to be received in order for the applicant to be considered.

Q: Can I do telephone interviews for applicants who are not local?
A: When interviewing applicants, the preferred interview method is always an in-person interview. However, for some positions, cross-country travel for an interview is not a reasonable option for an applicant. To be fair and consistent to all candidates, each (no matter where their application indicates that they reside) should be offered an in-person interview first. If an applicant indicates that he or she unable to travel to the area, it is recommended that you offer the long distance candidate an interview via webcam to allow the committee and the candidate to see each other during the interview. This will allow for non-verbal communication, as it cannot over the phone. Finally, if a webcam interview is not an option; a telephone interview may be scheduled. If an on-campus interview is possible, it would be the best option for all

parties. Scheduling a telephone interview for one applicant in your search does not mean that you must do telephone interviews for all candidates. If you have any questions, please contact Employment Services.

Q: What is the benefit of placing applicants on "Reserve" status?
A: Should your most qualified applicants be ruled out or withdraw from the search, rather than cancelling the search and starting over, you can consider those applicants you have placed on reserve. If you have placed any candidates on "Reserve" status when requesting to interview, you may interview those candidates. There are a few things you must consider before doing so. You either need to interview all of the candidates that were in reserve status, or rank them based upon the level of their qualification, in an effort to determine which applicants should be interviewed for the position first. If you have not placed the applicants in tiers (see note below), you need to contact your AAC and Human Resources to ensure they are aware of your decision to interview candidates from the Reserve pool, and that they agree with the ranking of the reserve candidates. The notes for the reserve candidates need to be clear to show which candidates are more qualified than the rest, if they are not clear in showing ranking, additional information will need to be added to the notes in ATS so that it is clear. Before interviewing any of these candidates, please add a note into the Notes/Misc. section of the announcement indicating your intention to interview your Reserve candidates.

> **Reserve Tiers** – To avoid going through these additional steps when going into your reserve pool, you can place your reserve candidates in tiers. When entering the notes prior to Requesting to interview, specify which tier each reserve applicant is in based on the level of their qualification. This information will be in addition to some detailed information about the specific qualifications they show strength in. If you have done this, and your Request to Interview has been approved, you can interview your first tier reserve candidates without seeking additional approval. Should those candidates in your first tier of Reserve not work out, you could then go into the second tier reserve without additional approval. Should you have any questions about this process please contact Employment Services for assistance.

Q: Is it ok to contact an applicant's current or former supervisor(s) listed on their application?
A: The short answer is yes. When an applicant submits their materials they "authorize the University of Idaho to inquire [into their] record with any or all of [their] former employers or references and release[s] the University of Idaho from liability in connection with these inquiries".   It is strongly recommended to contact former and current supervisors to verify an applicant's employment history and to check their performance record within their position(s). While the references listed on the application may provide some valuable insight into the applicant's employment history or their personal relationship with the individual, they may not have been responsible for evaluating the applicant's performance and may be unable to reveal potential problem behaviors or activities which could create a liability for the university

As a courtesy to the applicant, we advise requesting his or her permission prior to contacting their current supervisor and only contacting their current supervisor if the person is a finalist.   This allows the finalist the opportunity to let their supervisor know they are applying for a different position. However, this is not a requirement and is a simply a courtesy to the applicant. If the applicant requests on his/her application materials to be notified prior to their current supervisor being contacted, it is best to try to accommodate their request. But again, it is not a requirement as the applicant has already granted their permission when he/she submitted their application. If the applicant is unwilling to grant permission to contact a reference, it can be used as a reason to no longer consider the applicant as a viable candidate.

Q: When doing reference checks can I contact off-list individuals in an effort to gather more information?
A: Contacting individuals not listed on the employment application opens the university up to potential liability. Should the committee decide to call off-list, it is critical the applicant provide either verbal or written permission to do so. If the authorization is verbal, the date and time of the authorization needs to be clearly documented. A note of caution, calling off-list does not always produce the most accurate information about an applicant's performance and the information received is likely to be biased, either negatively or positively. Your best source of information usually comes from the applicant's supervisor(s).

You will need to make sure the reason that person was called is relevant and clear. What if you are calling others on some candidates but not others? If those contacts make or break the decision to hire, how you approached this part of the hiring process is of great interest to many, including the applicant and any auditor.