HireTouch Applicant Tracking System

User's Guide for Admin Support

LEHIGH UNIVERSITY | HUMAN RESOURCES

HireTouch Applicant Tracking System
– User's Guide for Admin Support –

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Introduction

Lehigh's Human Resources (HR) Office manages and oversees the employment process for classified staff positions. HR provides support and guidance for hiring managers, search committees, employment coordinators, and designated admin support throughout the university. This guide is designed to provide user information for utilizing the applicant tracking system.

Staff hiring can be conducted in either a centralized or decentralized fashion with respect to the degree of involvement by HR. While nonexempt position searches are usually centralized through HR, most exempt position searches are decentralized to individual campus departments.

In centralized searches, the applications review and preliminary screening steps are handled by HR working with the hiring manager. Once the applicant pool has been reduced to a manageable number of qualified candidates, then the hiring manager reviews and selects four to six candidates for first interviews. HR completes the first round of interviews and recommends the top two or three candidates for departmental interviews. The hiring manager then takes over the interview and selection process. Administrative staff may be asked to provide support.

In decentralized searches, each hiring manager takes on the full responsibility of the search process from preliminary screening through reference checks. For some positions, a search committee may work with the hiring manager during the screening, interviewing, and finalist selection steps. Administrative staff may be assigned specific tasks to move candidates through the applicant tracking system. The HR staff members primarily serve in a consultative role.

For all types of searches, HR retains responsibility for advertising the position, conducting background checks, determining the appropriate grade/starting pay range, approving employment offers, and preparing the formal offer letter, new hire paperwork, and onboarding information.

General Information About Applicant Tracking

Applicant tracking for classified staff positions at Lehigh University is facilitated through the use of HireTouch*, an easy-to-use, web-based program. With this system, we can:

- Post open positions for recruiting internal and external applicants
- Review applications, resumes, cover letters, and other applicant documents
- Schedule interviews and attach notes
- Track applicants as they progress through the recruitment and selection process
- Initiate timely, customizable email communications, including "regrets" correspondence.

The applicant tracking system centralizes information accessibility and automates the hiring process which enables hiring managers, search committees, employment coordinators, and others involved in position searches to handle a larger applicant pool more efficiently. This users' guide explains the various features of the applicant tracking system and their uses relevant to each step of the search process.

User Roles

Within the applicant tracking system (ATS), there are several types of user roles. Each role has a different level of permissions, allowing/disallowing access to specific features. User roles are set by the system administrator. System users who encounter a problem or need additional access should contact the Human Resources ATS administrator (83900 or inemploy).

Designated user roles within the applicant tracking system are:

- Hiring Manager
- Admin Support
- Committee Member.

User roles in the larger context of a decentralized hiring search are outlined in the chart below. Designated employment coordinators typically serve in the admin support role although a departmental coordinator or secretary may sometimes be assigned the admin support role for a particular search.

<table>
<tr><th>Human Resources:</th><th>Hiring Manager:</th></tr>
<tr><td>
◆ Generate Staff Employment Request Form*
◆ Create position posting
◆ Consult with hiring manager
◆ Provide ATS Training
◆ Advertise the position
◆ Conduct background checks
◆ Approve employment offers
◆ Prepare written offer letters
◆ Provide onboarding information

* The Staff Employment Request Form is commonly referred to as the SERF.
</td><td>
◆ Update the position description
◆ Complete and submit the SERF
◆ Review and approve the job posting
◆ Screen applicants
– Send correspondence
◆ Conduct candidate interviews
– Document results (“add notes”)
– Send correspondence
◆ Select finalist(s)
◆ Conduct reference checks
◆ Formulate offer with HR
◆ Extend verbal offer of employment
◆ Implement new hire onboarding/training
</td></tr>
<tr><th>Admin Support:</th><th>Search Committee Member:</th></tr>
<tr><td>
◆ Provide applicant screening support
– Send correspondence
◆ Support candidate interview process
– Schedule interviews
– Add documentation (“notes”)
– Send correspondence
◆ Provide onboarding support to new hire
</td><td>
◆ Participate in applicant screening
◆ Participate in candidate interviews
– Facilitate interviews, as assigned
– Add documentation (“notes”)
◆ Offer recommendations for finalist(s) selection
</td></tr>
</table>

Beginning the Search

Prior to conducting a search using the ATS, there are several preliminary steps to be completed:

Review/update position description
[Initiated by HR; Performed by Hiring Manager]

Staff Employment Request Form with approvals
[Initiated by HR; Completed by Hiring Manager]

Create open position posting
[HR Staff]

Review/approve position posting
[Hiring Manager]

Post open position to the ATS, upon approval
[HR Staff]

Initial consultation [HR Staff & Hiring Manager]
- Define position requirements
- Review search procedures
- Develop a recruitment/advertising plan
- Train on use of the ATS system

Implement recruitment/advertising plan
[HR Staff; facilitated through the ATS]

All ATS users —hiring managers, search committee members, and admin support—are required to read and sign a confidentiality agreement prior to receiving access.

Once you've met with HR and the ATS has started collecting applicants, you're ready to start using the system for your search.

System Login Instructions

All system users must enter their assigned login to access the customized administrative functions of the Lehigh ATS.

- ➢ New users will receive an email from the HR system administrator with the link to the ATS and login information
- ➢ From the *LOGIN* screen, type your sign-in name in the User Name text box
- ➢ In the Password text box, type your password
  This field is case-sensitive.
- ➢ Click the *SIGN IN* button.

Screenshot 1 – Login Screen:

Password Management

If you had access to the ATS in the past, the same user name and password still applies. Your password does not expire.

In the event that you forget your password, you can reset it either by clicking the Forgot Password link and completing the password security questions or by contacting HR.

Reset passwords are randomly generated and you will receive an email containing the new password at the email address that is registered in your profile. When you sign in for the first time with the randomly generated password, you will be required to create a new password.

Resetting passwords is faster and easier when using password security questions. In order for this option to be available, you must set up your own security questions and answers.

Logout

The Logout link is available from the upper right corner of the screen no matter where you are in the ATS [Screenshot 2, next page]. Simply click Logout to close out of the ATS.

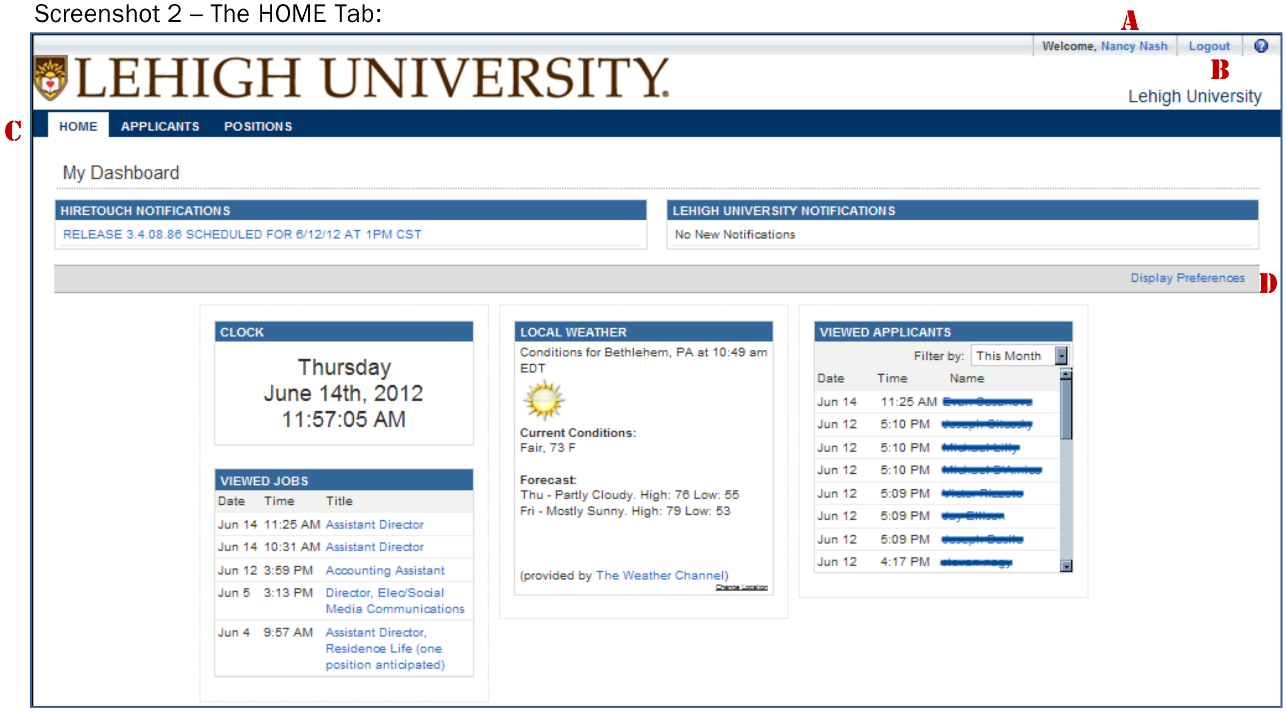
The applicant tracking system has an automatic time out after 20 minutes of inactivity. When this happens, you will need to log back in to re-access the system. All unsaved information will be lost.

Starting in the Home Tab

Once logged in, you will see the HOME tab [Screenshot 2] which provides a summary of recent activity and other general information. You can configure your HOME tab by clicking the Display Preferences link. The HOME tab is your primary entry point to the ATS. It is especially helpful if you have more than one active search in progress.

In the VIEWED JOBS summary box, clicking on a listed position link provides immediate access to the page for that specific job posting. Similarly, clicking on an applicant's name in the VIEWED APPLICANTS summary box provides immediate access to that applicant's information. To return to the home page at any time, click on the Lehigh University logo in the top left corner of the screen, or the HOME tab link on the toolbar.

Screenshot 2 – The HOME Tab:



Navigation Key:

A Link to user profile **B** Link to logout **C** Main Toolbar **D** Display Preferences Link

When viewing a particular tab, that tab will appear white in the toolbar, as shown above.

Navigation and Layout

The ATS is navigated through a toolbar with a system of tabs at the top of the window. The tabs allow users to navigate through the main functions of the system. Additional options for the functions are available from the main windows and additional toolbars with pull down menus, buttons, and tabs will appear as the user moves through the system.

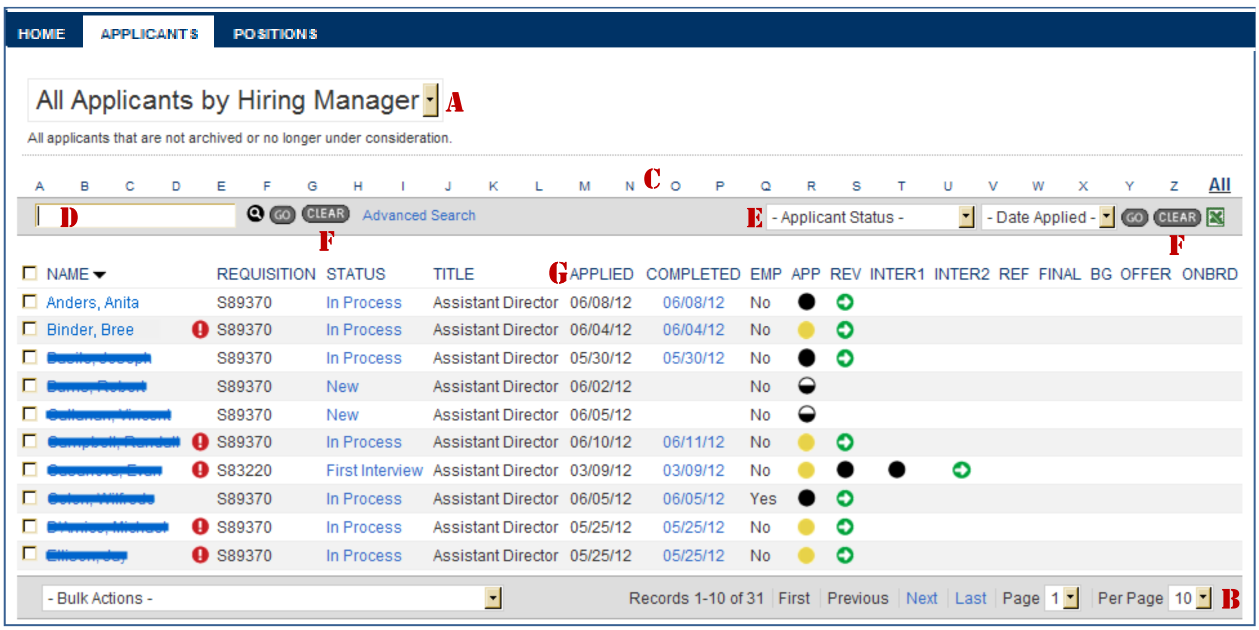
Toolbar Tabs:

- **HOME:** Provides a summary of available information (e.g., viewed job and applicants).
- **APPLICANTS:** Provides access to all information about applicants that have applied to your position(s), including the status of any pending applications or background checks.
- **POSITIONS:** Provides access to all currently posted positions in the user's permitted view.

Viewing the Applicants Tab

The APPLICANTS tab allows you to view and work with **all** prospective candidates who have applied for **one or more** of the posted positions assigned to you within the ATS (i.e., it's not position-specific). This tab can help you track activities pertaining to individual applicants.

Screenshot 3 – APPLICANTS Tab Filters and Search Features:



Navigation Key:

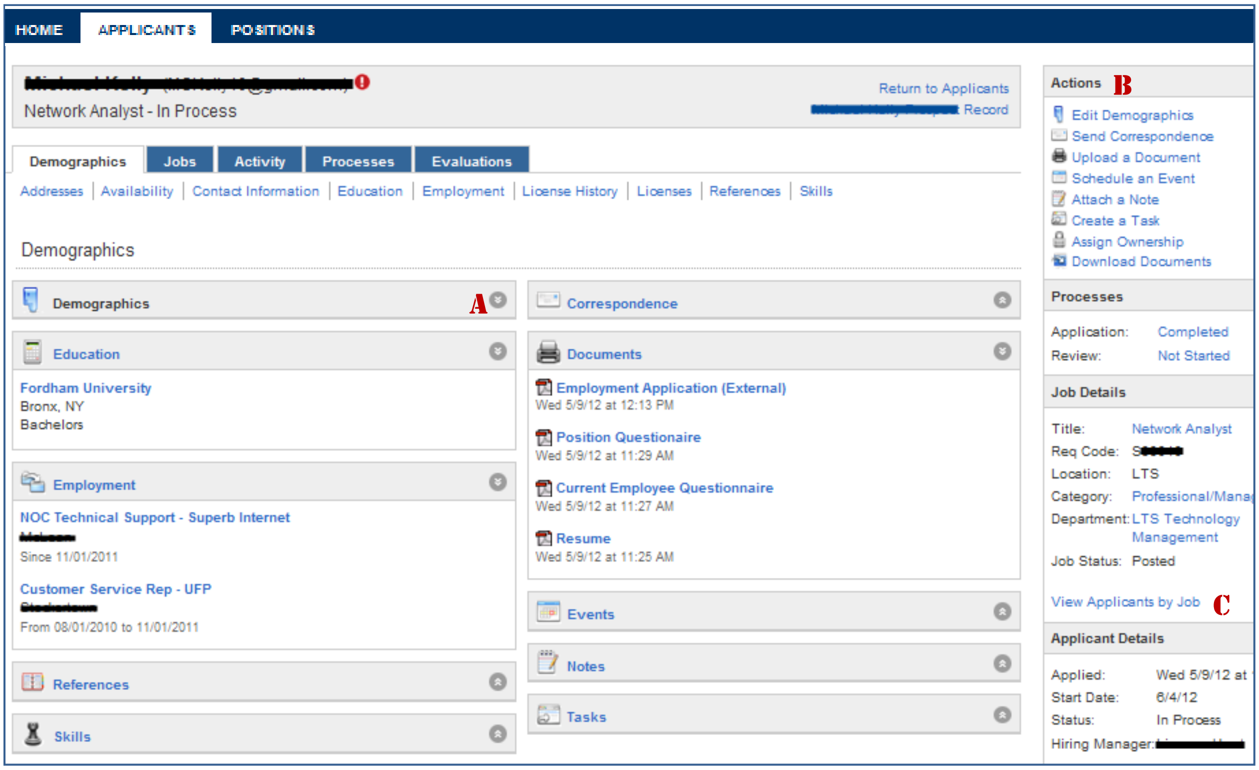
- **A** Default view; can be changed to Bulk Screening
- **B** Expand the number of names listed per page
- **C** Find applicants by first letter of last name
- **D** Search by last or first name; click GO (or just wait)
- **E** Other filters available to narrow focus, based on status
- **F** Click CLEAR to remove applied filters
- **G** Click any column heading to sort

The default view is All Applicants by Hiring Manager [**A**]. The APPLICANTS tab lists the first ten applicants in alphabetical order by last name. A drop-down field [**B**] allows you to expand your view from 10 to 15, 20, or 25 applicants per page. Other tools along the bottom of the screen help you move through the list of applicants (i.e., First, Previous, Next, Last, Page).

The various sort/search options can help locate specific applicants. The default view of the APPLICANTS tab shows the process steps and step status for each applicant. You can view additional information quickly by hovering your mouse over the various headings and icons.

Click on any applicant's name from the list and a Demographics page will open to show that applicant's complete record.

Screenshot 4 – DEMOGRAPHICS Page:



Navigation Key:

- **A** Use the in each box to expand or collapse the information on view
- **B** Use the links in the Actions box to perform various tasks
- **C** Use the View Applicants by Job link to return to the Applicants list

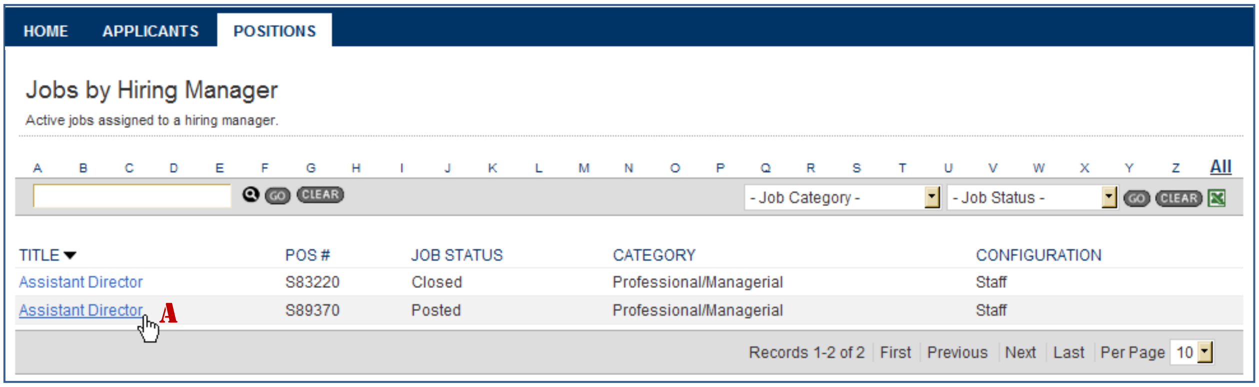
The Demographics page displays all information about this applicant, including information from his or her application, updates on progress through the workflow, activities for this applicant (e.g., interviews, references, etc.), and notes and tasks created in reference to this applicant. Any activity that should be recorded regarding an applicant, from scheduling an interview to writing a note about the applicant, can be done from this page.

Although you will be returning to the APPLICANTS tab many times in the course of reviewing applicants and moving them through the process, you will primarily be working through the POSITIONS tab where you can focus on the applicants for one particular search at a time.

Working in the Positions Tab

Selecting the POSITIONS tab brings up a list of the open positions assigned to you. It lets you view information about the posted position(s). Additionally, like the APPLICANTS tab, the POSITIONS tab allows you to view and work with individual applicants. Unlike the APPLICANTS Tab, the Applicants page within the POSITIONS tab is job-specific.

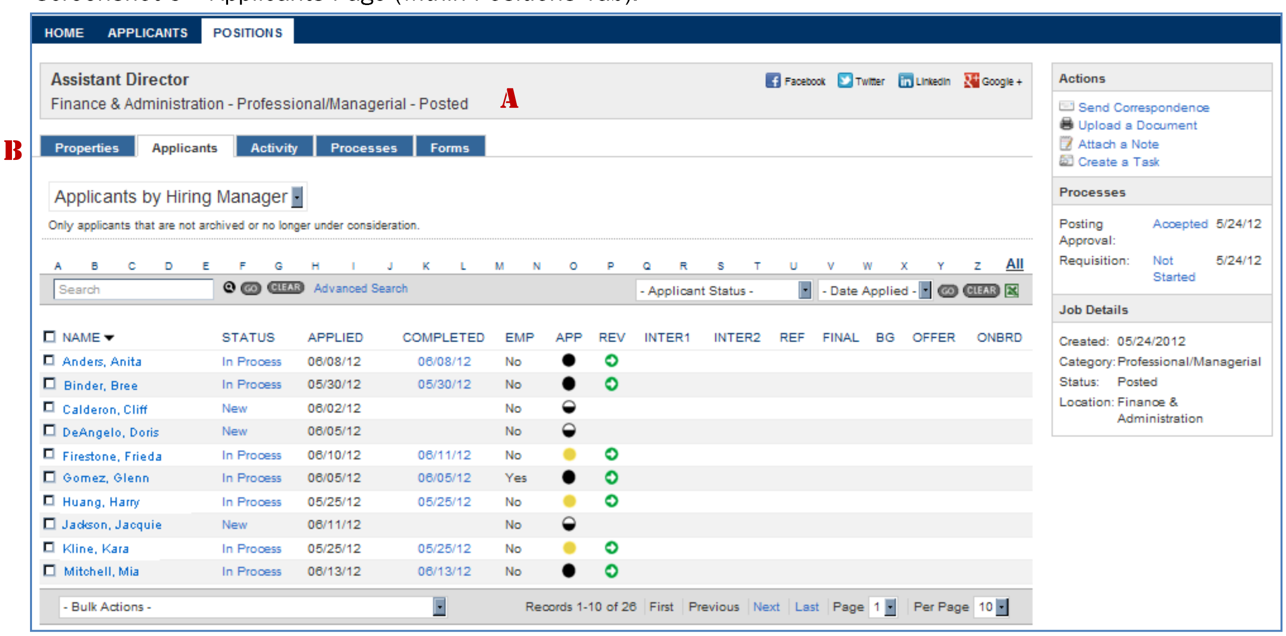
Screenshot 5 – POSITIONS Tab:



Navigation Key:

A Select the position title for a search and the Applicants list for that position appears

Screenshot 6 – Applicants Page (within Positions Tab):



Navigation Key:

A Displays position title with department, position type, and search status

B Choice of five sub-tabs; the Applicants page is currently open (tab appears white)

The POSITIONS tab features several pages (Properties, Applicants, Activity, Processes, and Forms) shown below the position title. The default view is the Applicants page [Screenshot 6, previous page] which looks nearly identical to the APPLICANTS tab view although we are currently in the POSITIONS tab.

The column to the immediate right of the listed applicants shows the current STATUS of each applicant. In the previous screenshot, we can see that most of the applicants are currently "in process" with applications ready for review. The APPLIED column shows the date that each applicant initially applied. The COMPLETED column provides the date that each applicant actually completed the online application. The EMP column denotes employee status; a YES in this column tells you that this applicant is an internal candidate. The remaining columns correspond to different steps in the search process:

- APP = Application; provides shortcut links to applicant's documents
- REV = Review
- INTER1 = First Campus Interview
- INTER2 = Second Campus Interview
- REF = Reference Checks
- FINAL = Final Approval of Offer by HR
- BG = Background Checks
- OFFER = Offer Letter
- ONBRD = Onboarding

During the search process, the hiring manager is responsible for each step, from application review through to the reference checks, although some tasks may be delegated to an administrative support person. The remaining steps are handled by HR.

The Properties page contains the job posting [Screenshot 7, next page]. The job posting is a concise version of the position description including job title, department, summary of purpose, key accountabilities, special considerations, qualifications (e.g., education, experience, and skill requirements), and other details such as work schedule, hiring manager, etc. Prospective applicants are able to view most, but not all, of the job posting information from our external website. Some details including names and contact information are shielded from the applicants' view. This posting can also be sent by HR to various external sites (e.g., higheredjobs.com, HERC) for wider recruitment.

Screenshot 7 – Properties Page:

HOME APPLICANTS POSITIONS

Assistant Director

Finance & Administration - Professional/Managerial - Posted

Properties | Applicants

Details | Additional Information

Properties

Job Details

Title: Assistant Director

Position Number: S8[redacted]

Job Category: Professional/Managerial

Job Family: Student Life

Website: http://www4.lehigh.edu/housing

VP Stem: Finance & Administration

Department: Residential Services

Hire Type: External

Contact: Nancy Nash

Opened Date: 03/08/2012

Closed Date: 04/18/2012

Summary: This positions assists in managing all administrative and operational functions within both undergraduate and graduate residential areas. Coordinates special programs, student billing in residential areas, and life safety information and functions in residential

Accountabilities:

1. Assist in managing student billing in residential areas
   - Assist in managing student billing in residential areas including student damage billing, room charges, meal charges, and other charges associates with living in residential areas
   - Assist in educating students, house leadership, residence hall leadership, Alumni, and parents regarding personal Bursar bills and the billing process

Special Considerations:

1. Periods of high volume/workload may be required
2. Required to be on call
3. Occasional evening, holiday or weekend hours

Qualifications:

1. Master's Degree or equivalent combination of education and experience
2. One to three years related work experience
3. Excellent communication and interpersonal skills

Months Worked: 12

Hours Worked per Week: 40 hours per week

Annual FTE: 100%

Hiring Minimum (for nonexempt positions): 7-40

Hiring Manager: Nancy Nash

Evalutor:

Admin Support Access: [redacted], [redacted]

Committee Members: Alex Anderson, [redacted], [redacted], [redacted]

Initial Screening of Applicants

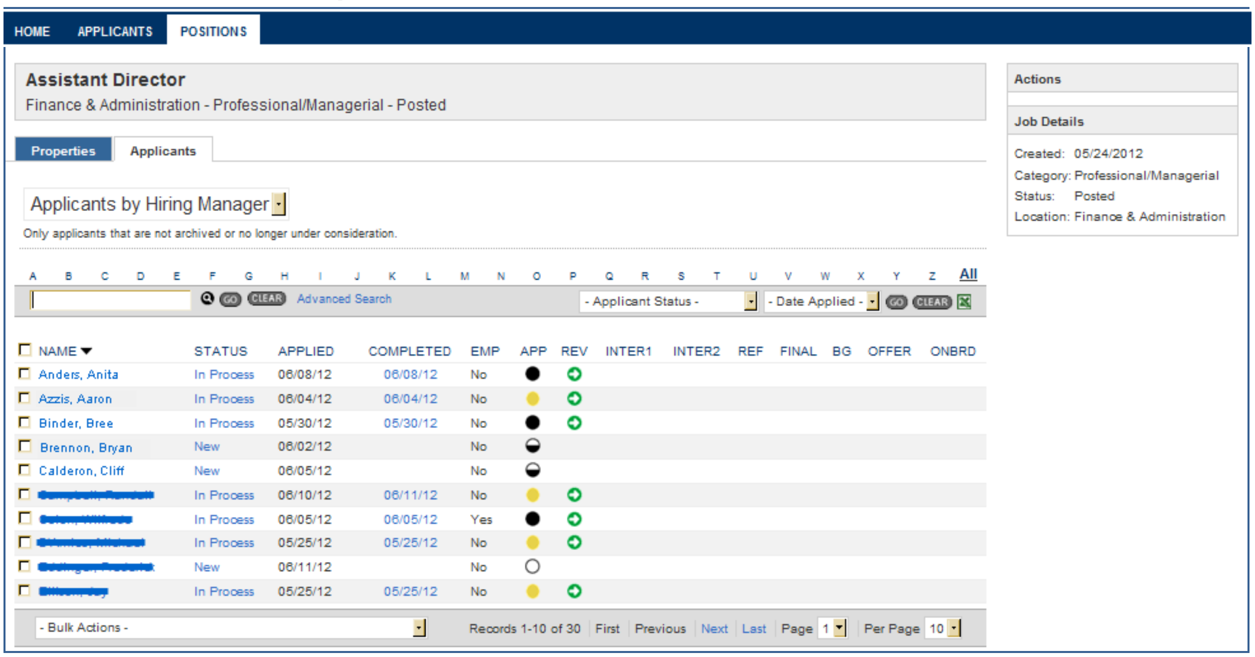
The initial screening of applicants is performed by HR (centralized searches) or the hiring manager and/or search committee (decentralized searches). The assigned admin support can access the ATS at any time, once the open position is posted, to look at the applicant pool and monitor progress. Select the POSITIONS tab and then click on the position title. The Applicants page will appear by default [Screenshot 8]. Within the applicant pool, the APP (application) column will contain a circle by each applicant:

- ○ or ◒ = application started but not completed by applicant
- ● or ● = application complete

The yellow circle means the applicant has indicated that he/she would like to receive a copy of his/her credit report if one is requested. In some views, this may be indicated by a ❗*. This alert is for HR purposes only… no action is required by the hiring manager.*

Additionally, you'll see green circles with arrows ➲ in the REV (review) column. This arrow always indicates an action step. During the search process, this arrow will move forward from column to column as each step in the process is completed for a particular applicant.

Screenshot 8 – Applicants Page:



The following tasks [Task 1: Filter Out Incomplete Applications and Task 2: Remove "Not Qualified" Applicants] are performed by HR for centralized searches. For decentralized searches, these tasks are usually performed by the hiring manager but may be delegated to an assigned admin support.

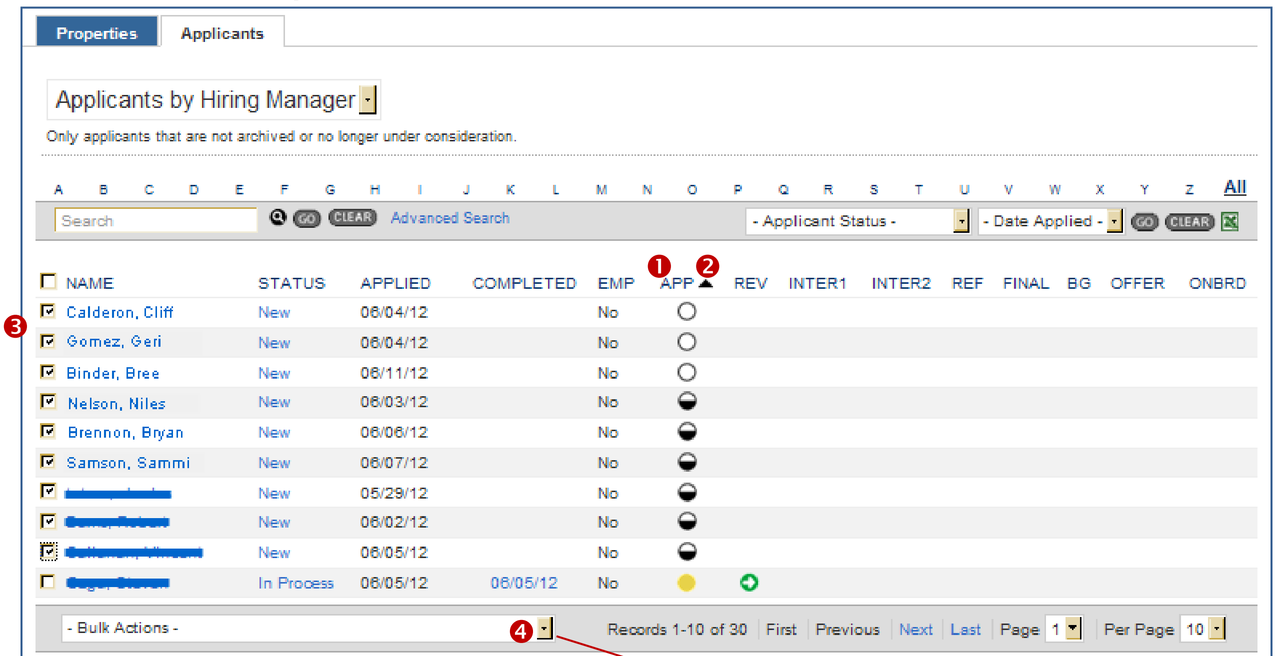
At the start of each search, the hiring manager should meet with the assigned admin support to discuss and clearly define specific roles and responsibilities.

Task 1: Filter Out Incomplete Applications

In every search, there are always some applicants who don't fully complete the application process. From within the applicant tracking system, a friendly "please complete an application" email can be sent to applicants. Here's how:

- Select the POSITIONS tab and click on the position title
- In the Applicants by Hiring Manager screen [Screenshot 9], click on the APP column heading to sort by this column [❶]
- Click the ▼ to the right of APP column heading to reverse the sort order [❷]
- Click the selection box to the left of each applicant with an incomplete application [❸]

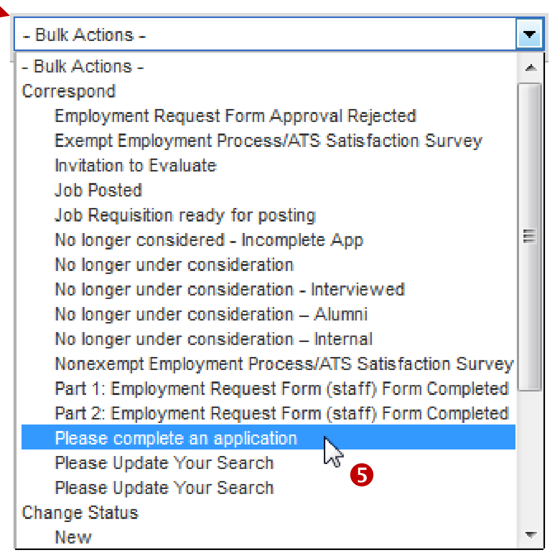
Screenshot 9 – Selecting Incomplete Applicants:



- Now click the Bulk Actions drop-down button [❹] and select "Please complete an application" from the menu of choices [❺]

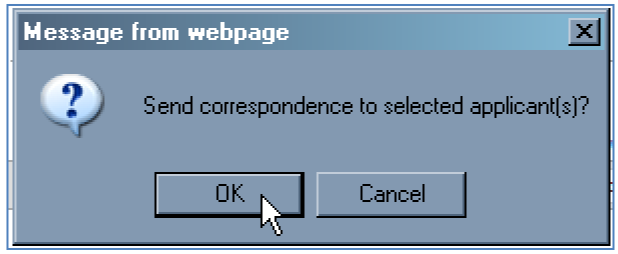
  The "Please complete an application" email includes a warning that the application will be removed from consideration after one week if no further action is taken by the applicant.

Screenshot 10 - Bulk Actions Menu:

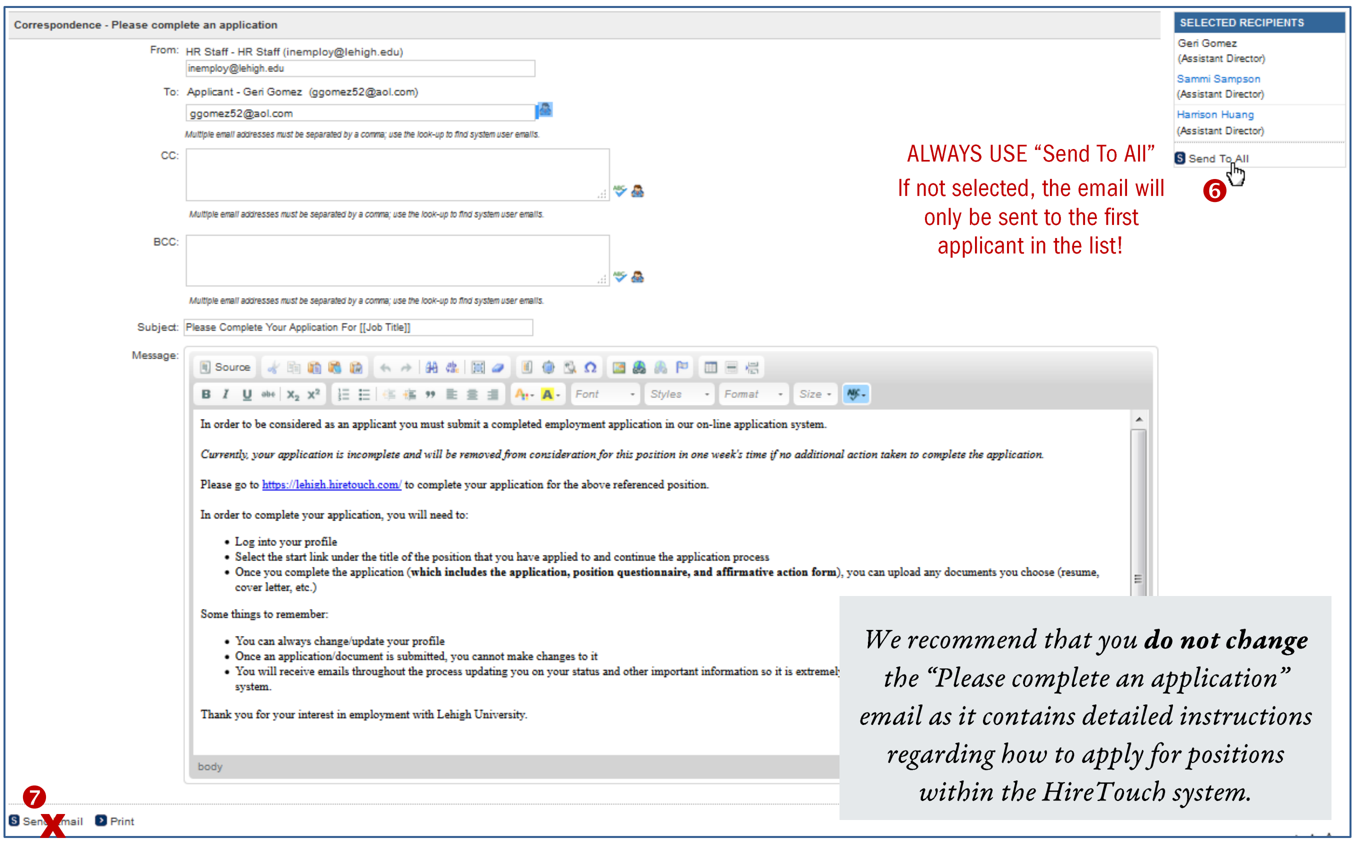


- A "Send correspondence to selected applicant(s)?" message will appear to verify this is the action you wish to take
- Click OK to continue
  This will NOT automatically send the email
- The browser will open a new window showing an e-mail template with a standard "please complete an application" email message that is ready to send [Screenshot 12]

Screenshot 11 – Action Confirmation Message:



Screenshot 12 – Selecting Incomplete Applicants:



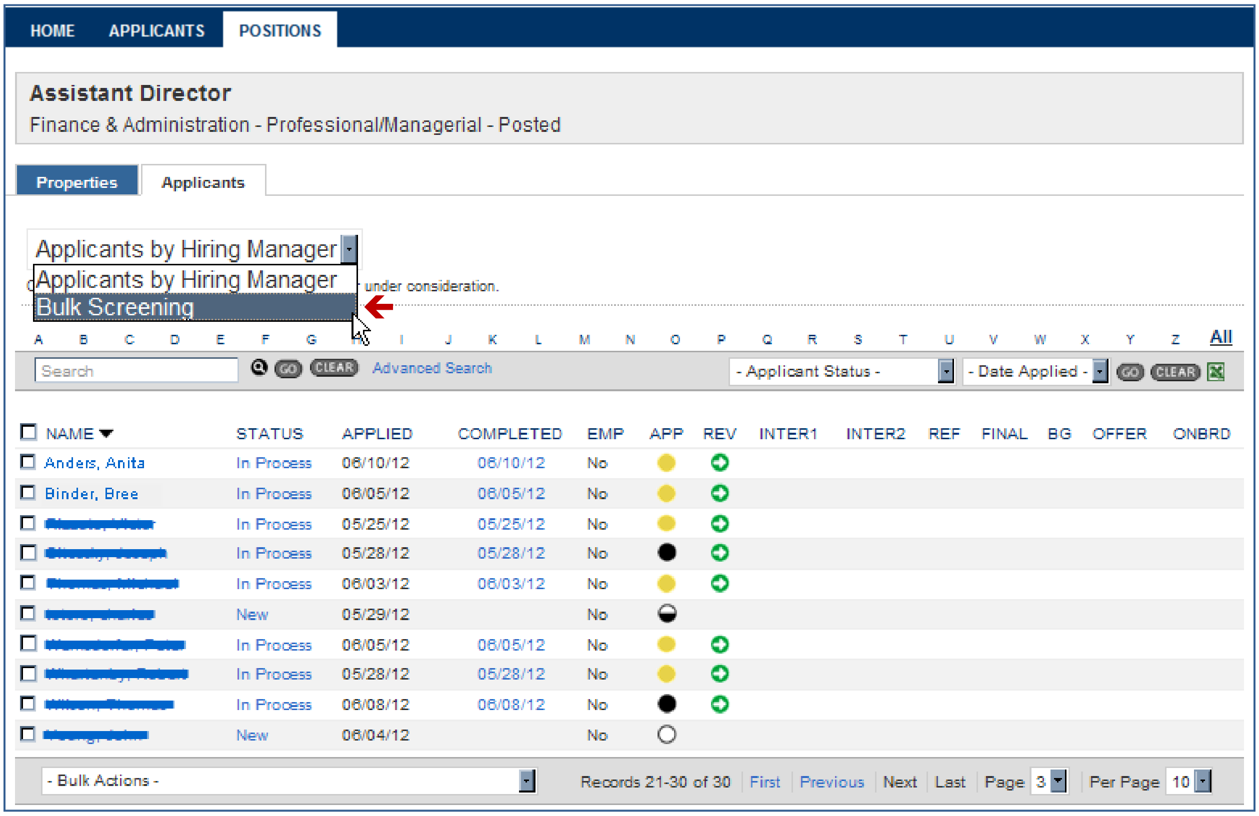
- Click on the "Send to All" option to send the email to multiple recipients [❻]
  Only use the "Send Email" button at bottom left [❼] if sending to JUST the first recipient
- Another "Send correspondence to selected applicant(s)?" message will appear to verify that this is the desired action; click OK to send the email.

Check back in a week. Any applicant who is still showing as incomplete after receiving the "please complete" email can be assumed to be no longer interested and removed from further consideration. [Follow Task 2 instructions, starting on page 18, for removing applicants deemed "not qualified."]

Bulk Screening

On the Applicants page within the POSITIONS tab, there is a choice of screening applicants individually or using the bulk screening option [🡐 in Screenshot 13]. Unless the posted position is highly specialized, most searches will have a large initial pool of applicants. In a decentralized search, it is the responsibility of the hiring manager and/or search committee to screen the applicant pool down to a more manageable-sized pool of qualified candidates. The easiest way to accomplish this is by utilizing the bulk screening option.

Screenshot 13 – Selecting the Bulk Screening Option:

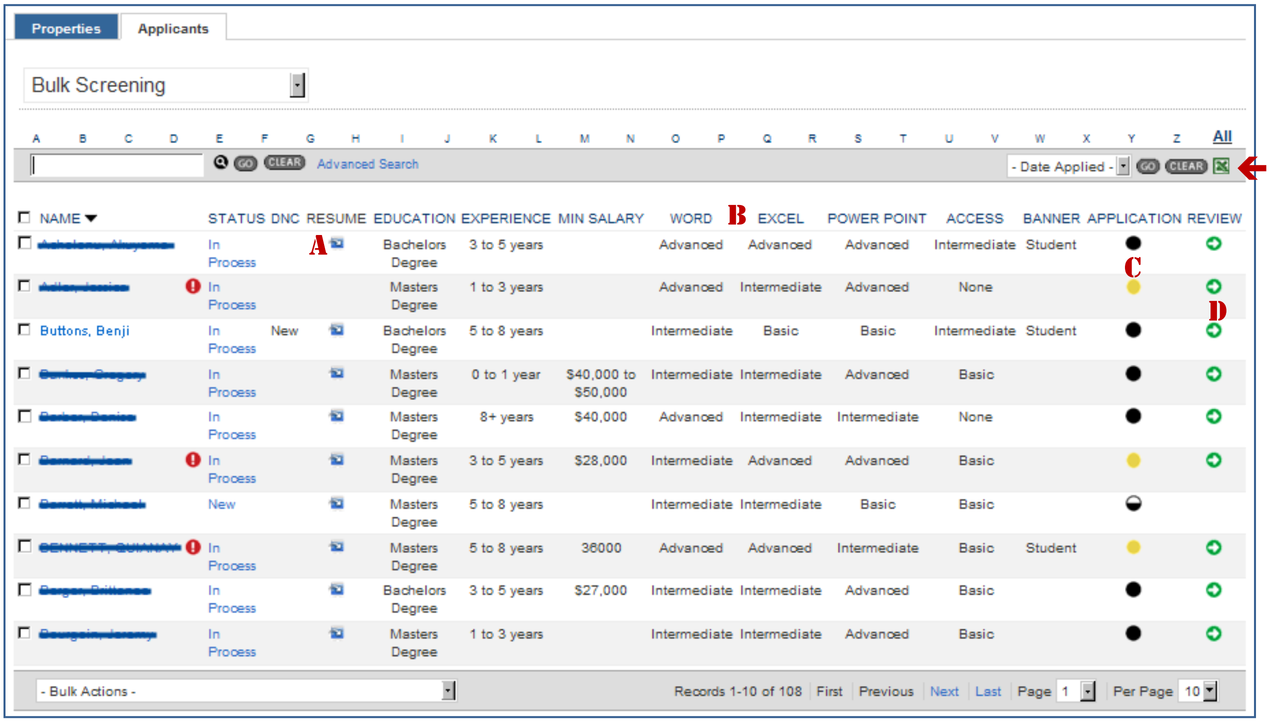


The bulk screening option pulls self-reported information from the *Position Questionnaire* that all applicants are asked to fill out. The questionnaire asks the following questions:

- Level of education
- Minimum salary requirement
- Number of years of related experience
- Skill level in Microsoft Word, Excel, PowerPoint, and Access
- SunGard Higher Education (Banner) experience.

The information displayed in the bulk screening view allows screeners to view and compare the qualifications of a group of applicants at one time rather than opening up individual applications and/or resumes. The next screenshot [Screenshot 14] illustrates the bulk screening view. The applicant name and status columns remain visible but the other columns have changed.

Screenshot 14 – Bulk Screening View:



NAME	STATUS	DNC	RESUME	EDUCATION	EXPERIENCE	MIN SALARY	WORD	EXCEL	POWER POINT	ACCESS	BANNER	APPLICATION	REVIEW
[redacted]	In Process			Bachelors Degree	3 to 5 years		Advanced	Advanced	Advanced	Intermediate	Student		
[redacted]	In Process			Masters Degree	1 to 3 years		Advanced	Intermediate	Advanced	None			
Buttons, Benji	In Process	New		Bachelors Degree	5 to 8 years		Intermediate	Basic	Basic	Intermediate	Student		
[redacted]	In Process			Masters Degree	0 to 1 year	$40,000 to $50,000	Intermediate	Intermediate	Advanced	Basic			
[redacted]	In Process			Masters Degree	8+ years	$40,000	Advanced	Intermediate	Intermediate	None			
[redacted]	In Process			Masters Degree	3 to 5 years	$28,000	Intermediate	Advanced	Advanced	Basic			
[redacted]	New			Masters Degree	5 to 8 years		Intermediate	Intermediate	Basic	Basic			
[redacted]	In Process			Masters Degree	5 to 8 years	36000	Advanced	Advanced	Intermediate	Basic	Student		
[redacted]	In Process			Bachelors Degree	3 to 5 years	$27,000	Intermediate	Intermediate	Advanced	Basic			
[redacted]	In Process			Masters Degree	1 to 3 years		Intermediate	Intermediate	Advanced	Basic			

Navigation Key:

A The RESUME column includes a direct link to each applicant's résumé, if one was uploaded

B The remaining columns allow for easy comparison of various types of qualifications including proficiency in common office software programs and Banner knowledge.

C The circles ●● in the APPLICATION column provide quick links to view individual applications

D The arrow ➲ in the REVIEW column indicates an action is required

The information in most of the ATS screen views can be exported to an excel spreadsheet [🡐]. This export function is especially useful for the bulk screening information. Once exported to a spreadsheet, new columns can be inserted to add more information for screening comparisons or to add steps to track applicants through customized search processes. Exporting to an excel spreadsheet also enables multi-level sorting. Search committees, in particular, often find the export feature quite useful. If you decide to utilize this feature, it is important to remember that:

- Exporting to excel captures information available at a single point in time. New applicants added to the ATS or status changes made in the ATS will not automatically appear in the excel spreadsheet or vice versa. The export function is best used once the initial screening process has been completed (Tasks 1 and 2) and preferably after the position has been closed to any new applicants.
- When used, spreadsheets can provide a valuable tool for documenting the search. As such, everyone involved in the search needs to be aware that information recorded in the spreadsheet should be strictly factual and relevant. At the end of the search, the spreadsheet can be attached to the search within the ATS. Contact HR for assistance.

Task 2: Remove "Not Qualified" Applicants

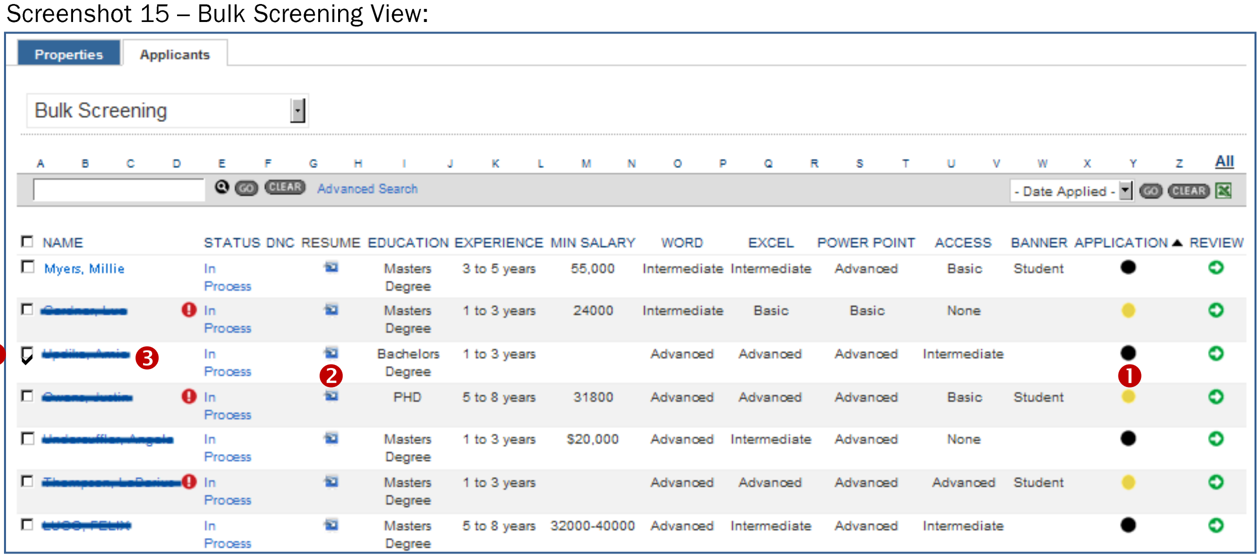
The bulk screening view is recommended for the preliminary screening of job applicants. Screeners can look at the education, years of experience, minimum salary, and computer skills information listed in the bulk screening view to compare basic qualifications. Any applicants deemed "not qualified" for the position should be notified and removed from view.

The ATS includes five variations of a *No Longer Under Consideration* email template:

- No Longer Under Consideration – Incomplete App is used for applicants who did not complete the application process after receiving prior "Please complete an application."
- No Longer Under Consideration is used for "not qualified" applicants with no discernible Lehigh affiliation
- No Longer Under Consideration - Alumni is sent to "not qualified" applicants who graduated from Lehigh
- No Longer Under Consideration - Internal is sent to "not qualified" applicants who are currently employed in another position at Lehigh
- No Longer Under Consideration - Interviewed is used later in the process to send "regrets" email to applicants who interviewed (by phone or in person) for the position.

Each of these email templates may be edited to provide a customized message to the applicant. When sent, each email includes a personalized greeting to the applicant and a closing that includes the name of the hiring manager. Each time a *No Longer Under Consideration* email is sent, the recipient is removed from view within the applicant pool. The procedure is shown below:

Screenshot 15 – Bulk Screening View:



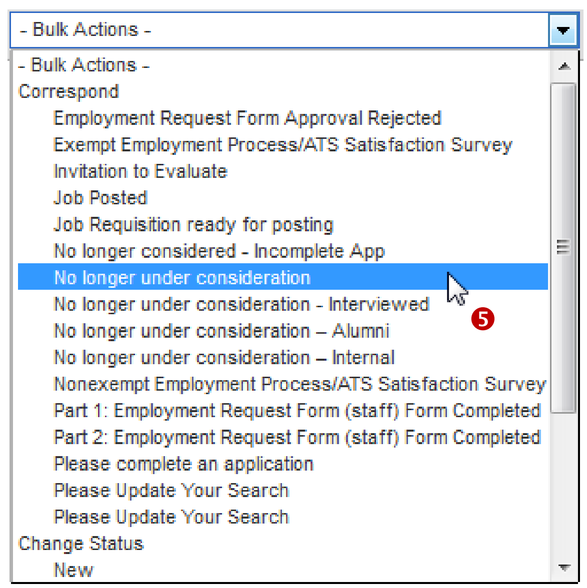
- ➢ Identify any applicants judged to be "not qualified" by the hiring manager and/or search committee, based on comparisons of the qualifications listed
- ➢ Open the applicant's application [❶] and/or resume [❷] for any Lehigh affiliation as either an internal applicant or as an alumnus of Lehigh

OR, click the applicant's name [❸] to bring up the Demographics page where various boxes display applicant information including education and employment from the application

- Make note of any applicants with a Lehigh affiliation (i.e., alumnus or internal applicant) then close the resume or application window
- Return to the Bulk Screening view by clicking the View Applicants by Job link (within the Job Details box that appears along right side of screen)
- Choose the first group of applicants—not qualified/no Lehigh affiliation—by clicking the selection box to the left of each applicant's name [❹]
- Now click the Bulk Actions drop-down button [bottom left of Bulk Screening window; visible in Screenshot 14, page 17] and then "No longer under consideration" from the Bulk Actions menu [Screenshot 16, ❺]

Be sure to choose the appropriate template!

Screenshot 16 – Bulk Actions Menu:



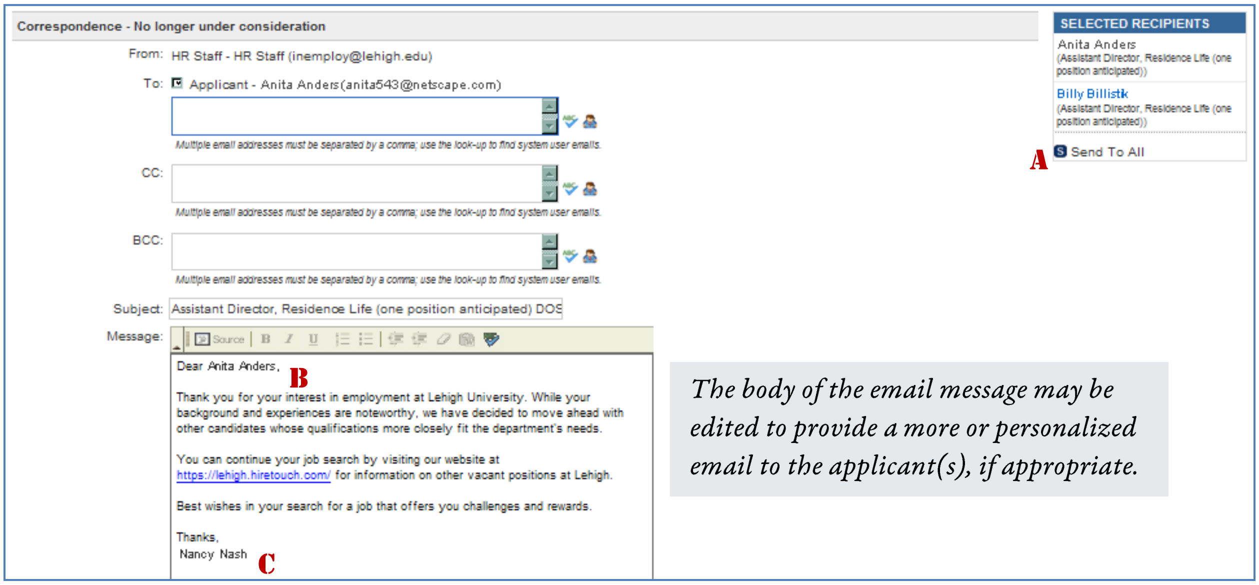
- A "Send correspondence to selected applicant(s)?" message appears to verify that you wish to take this action
- Click OK to continue

This does NOT automatically send the email

- An e-mail template opens [Screenshot 17, next page]
- Click the "Send To All" button [Screenshot 17, **A**] to send to all selected recipients

Use the "Send Email" button (below left of message) ***only*** *if sending to just one recipient*

Screenshot 17 – E-mail Template:



Navigation Key:

- **A** Click "Send to All" to send to multiple recipients
- **B** Each email will include a personal greeting to the recipient
- **C** Email will include the hiring manager's name (even if task is delegated to another system user)

- ➢ Repeat this process for "not qualified" applicants who are also Lehigh alumni, if any, but choose the "No longer under consideration – Alumni" email template
- ➢ Repeat this process for any internal applicants deemed "not qualified" for this position, but choose the "No longer under consideration – Internal" template.

If applicant is a Lehigh alumnus AND an internal applicant, treat as an internal applicant.

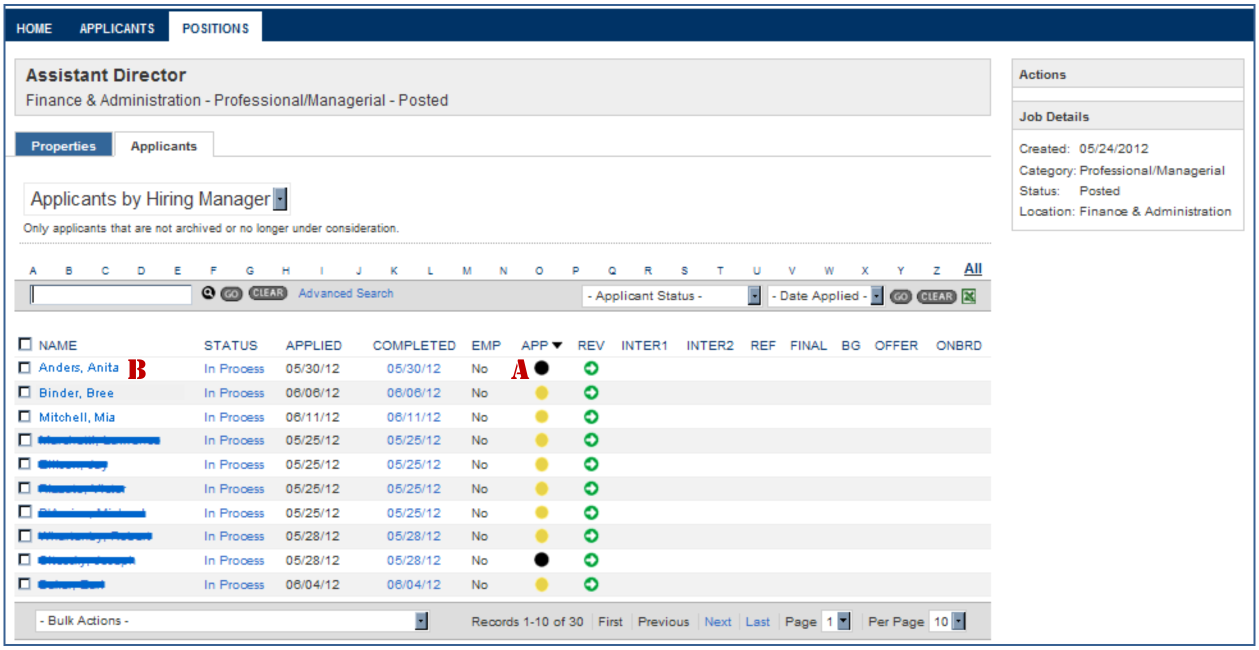
Each time a "no longer under consideration" email is sent, the recipients are removed from view within the applicant list.

Please contact HR if you need to view a candidate previously marked as "no longer considered."

Individual Screening

Once the preliminary screening has been done and applicants identified as “not qualified” have been removed from the applicant pool, it’s time for a more careful review of the remaining applicants. Hiring managers and/or search committees should do this from the Applicants by Hiring Manager screen within the POSITIONS tab of the ATS.

Screenshot 18 – Positions Tab/Applicants by Hiring Manager:



Navigation Key:

A Click on the circle in the APP column to quickly find all documents available for that applicant

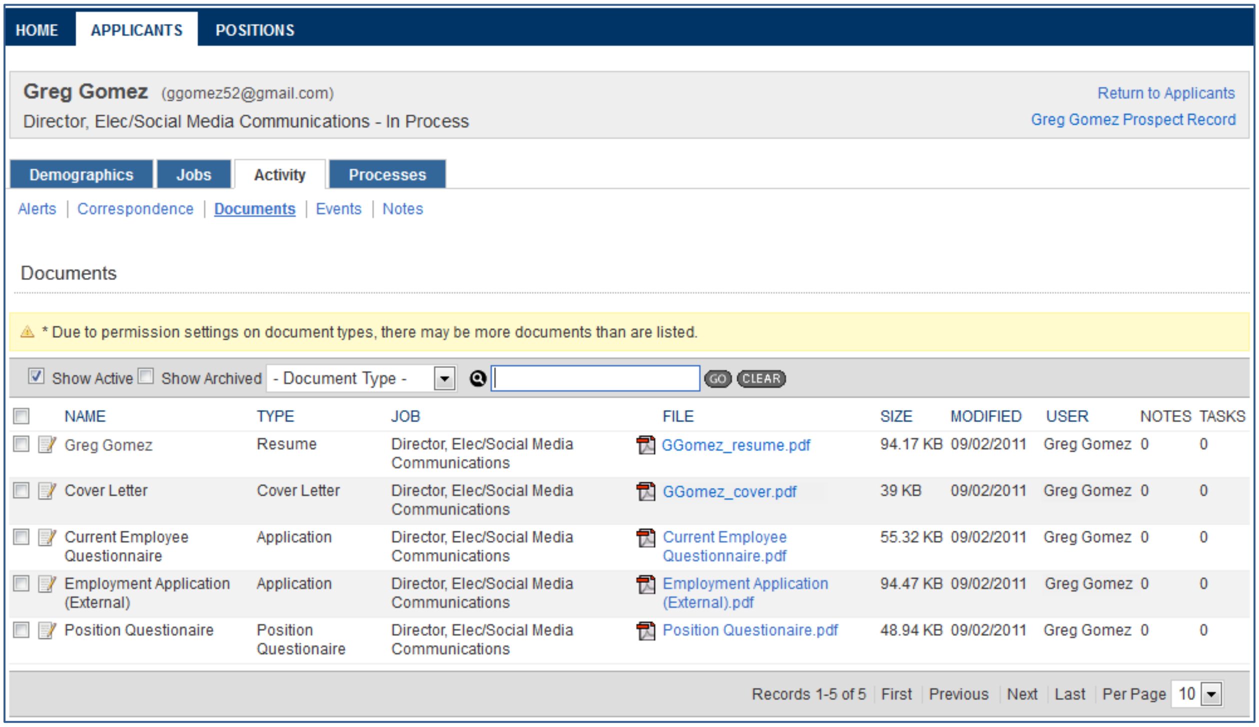
B Click on an applicant’s name to go to the Demographics page for that applicant

For most applicants, the following documents are available for view:

- **Current Employee Questionnaire** – this is a simple, one question document that is used to identify internal applicants in the system; once answered, the response appears in in the EMP column on the Applicants by Hiring Manager screen [see Screenshot 18]
- **Employment Application** (External or Internal) – all applicants for Lehigh positions are required to submit an application; the application provides a consistent format for easier comparisons between applicants
- **Position Questionnaire** – applicants are requested to complete this questionnaire which provides the education, experience, salary requirements, and computer proficiencies used to populate the bulk screening view.
- **Resume** – most applicants will upload a resume although this is not required for staff searches; the document name is determined by the applicant and will vary but if uploaded correctly, it should be identified as a resume in the document type field
- **Cover Letter** – an optional document that may be uploaded by an applicant; although optional, hiring managers are encouraged to read cover letters if available

These documents can be found in the applicant's documents list [Screenshot 19] which appears upon clicking the circle in the APP column from the Applicants by Hiring Manager screen.

Screenshot 19 – Documents List in Applicants Tab:



Other documents (e.g., writing samples, certifications, clearances, etc.) may be attached by the applicant, as desired, or as directed by the position posting. Within the documents list for a particular applicant, duplicate or alternate versions of documents may sometimes be listed... once uploaded, neither the applicant nor the hiring manager can delete them. Each document window (pdf files only) can be easily minimized, maximized, or closed. Other types of files will open in the associated software application (e.g., Microsoft Word). Documents may be printed or temporarily saved to the reviewer's desktop for easy access, if desired.

In centralized searches, the following task is performed twice. First, HR reviews documents and qualifies a limited pool of candidates for further consideration. Then the hiring manager reviews the qualified pool (typically about twenty candidates) to select four to six candidates to focus on during the next step of the search process.

For decentralized searches, search committee members may be involved in reviewing individual applicant qualifications. If the initial applicant pool is not too large, committee members may review the entire pool. If there are a lot of applicants, the hiring manager may decide to review the applications first to qualify a smaller pool of applicants for committee members to review and select the best candidates to move forward in the search process. In either case, each committee member will usually read through the applicants' documents on their own and then meet collectively to compare findings and select the candidates to move forward.

Task 3: Qualified, Maybe Qualified, and Not Qualified

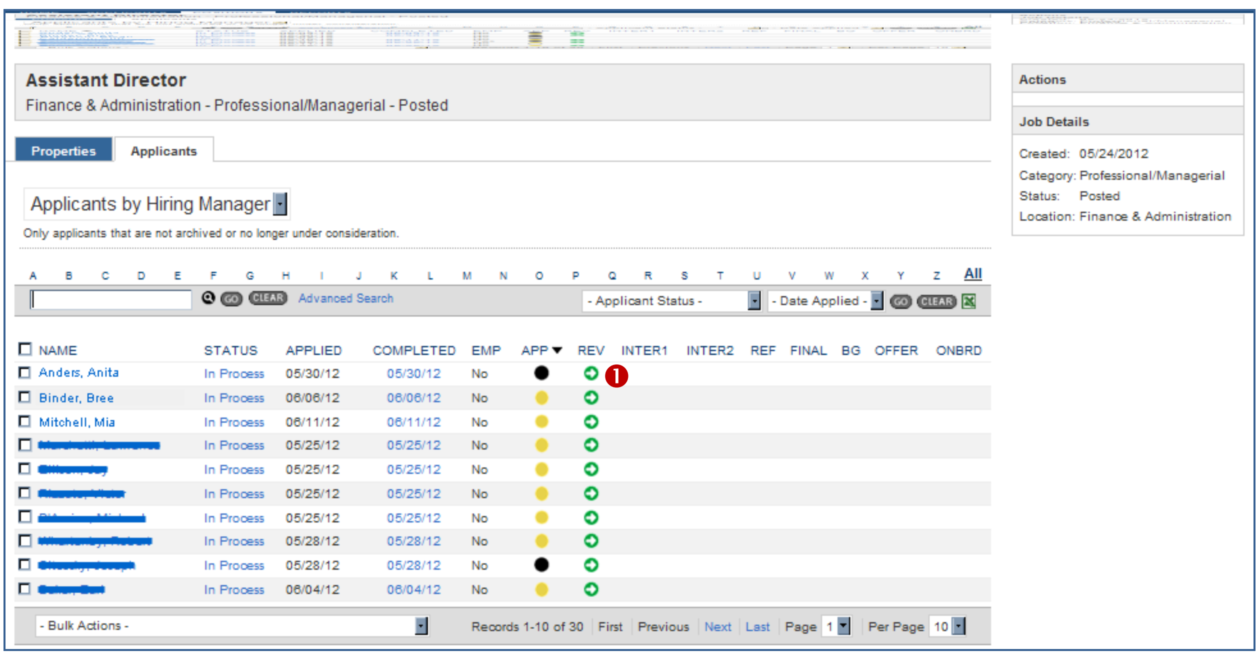
Based on a review of each applicant's documents, the hiring manager and/or search committee members will make a determination regarding whether that applicant should move forward in the search process:

- **Qualified** – the applicant's qualifications are a good to strong match with the position and department requirements; eligible to proceed to the interview steps
- **Maybe Qualified** – the applicant meets the minimal qualifications but the hiring manager or committee is not ready to commit to moving the applicant forward as a qualified candidate
- **Not Qualified** – the applicant's qualifications are a weak match (or no match) for the position and should be removed from further consideration.

Once this determination has been made for each applicant in the pool, some actions need to be taken within the ATS. The following actions may be done by the hiring manager or delegated to the assigned admin support.

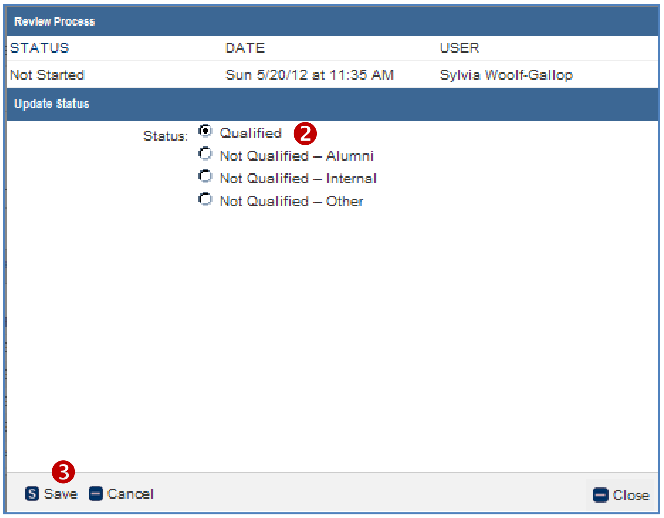
The specific action taken depends on whether the applicant is deemed "qualified," "maybe qualified," or "not qualified." The action will start from the Applicants by Hiring Manager screen.

Screenshot 20 – Applicants by Hiring Manager:



Qualified – if the hiring manager and/or search committee likes this applicant's qualifications, the Update Status window is used to move the candidate forward in the process.

Screenshot 21 –Review Process/Update Status Window:



- Click the in the REV (review) column [Screenshot 20, ❶, previous page]
- When the Update Status window appears [Screenshot 21], mark the applicant as "Qualified" [❷]
- Click the save button [❸] to return to the main screen;
- The should now be under INTER1 in the Applicants by Hiring Manager screen.

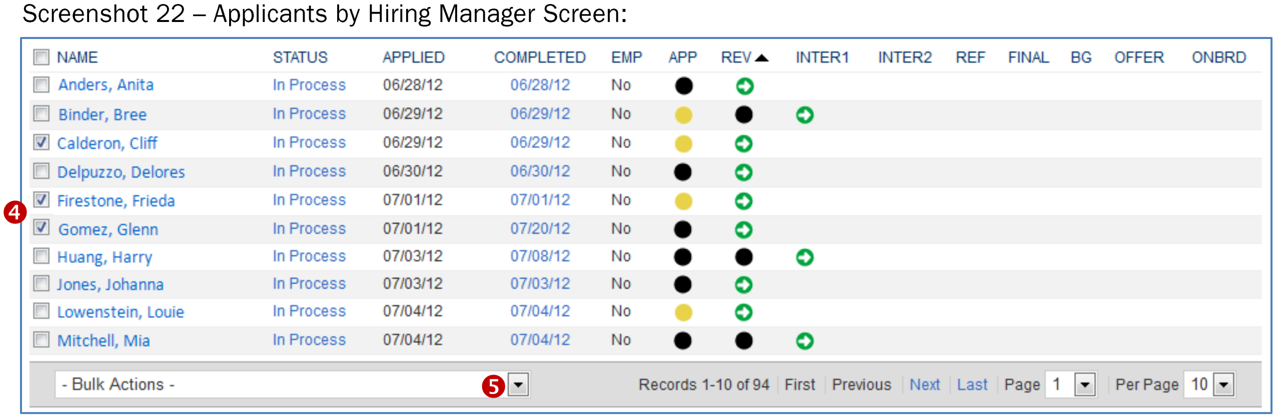
Maybe Qualified – sometimes an applicant meets the minimal qualifications but the hiring manager and/or search committee is not ready to move the applicant to the interview step but still wants to keep this person in the applicant pool.

- No action should be taken, just leave "as is" for now; the remains under REV.

Not Qualified – if the hiring manager and/or search committee decides that this applicant is not a good match for the position, the Bulk Actions menu should be used to notify and remove the applicant from view.

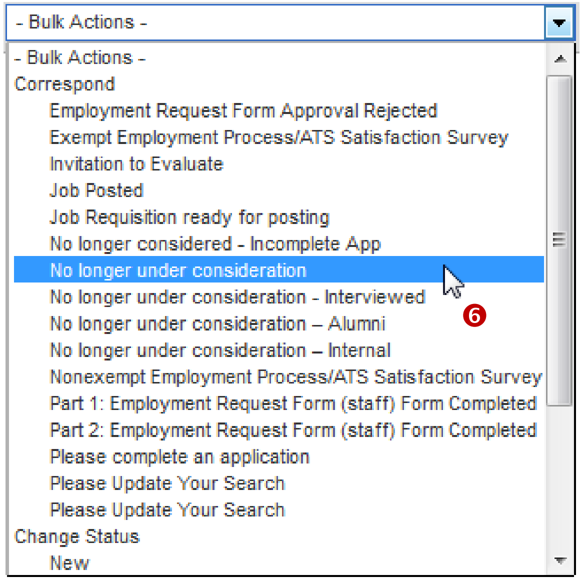
- Click the radio button to the left of the applicant's name [Screenshot 22, ❹]

Screenshot 22 – Applicants by Hiring Manager Screen:



- Then click the bulk actions drop-down [❺] to see the menu option [Screenshot 23, next page]

Screenshot 23 – Bulk Actions Menu:



- Select the applicable No longer under consideration email from the Correspond options listed [❻]
- An email template with a prepared message will open; the message can be edited, if desired, but it's probably not necessary at this point.
- Click Send to All in the email template; once sent, the applicant will disappear from view.

We don't recommend using the Update Status window [Screenshot 21, previous page] to mark an applicant as "not qualified." Although this is an option, doing so will automatically trigger the corresponding "no longer under consideration" email notification to the applicant without an opportunity to review or edit it first.

After completing the above actions, there should now be a more manageable pool of qualified candidates with black ● circles in the REV column and green ➲ arrows in the INTER1 column. If there are still have too many candidates, the hiring manager and/or search committee should review the qualified candidates again and select the top four to six candidates for the next step of the process.

Preliminary Phone and/or First Campus Interview(s)

The ATS has been configured to correlate with the most common Lehigh search practices. For centralized nonexempt searches, HR handles the preliminary or first interviews. For decentralized exempt searches, most departments conduct at least two on-campus interviews, with or without a preliminary phone interview. First on-campus interviews are usually conducted by the hiring manager with the four to six candidates whose qualifications best match the position's requirements. Alternately, these interviews may be conducted by the search committee.

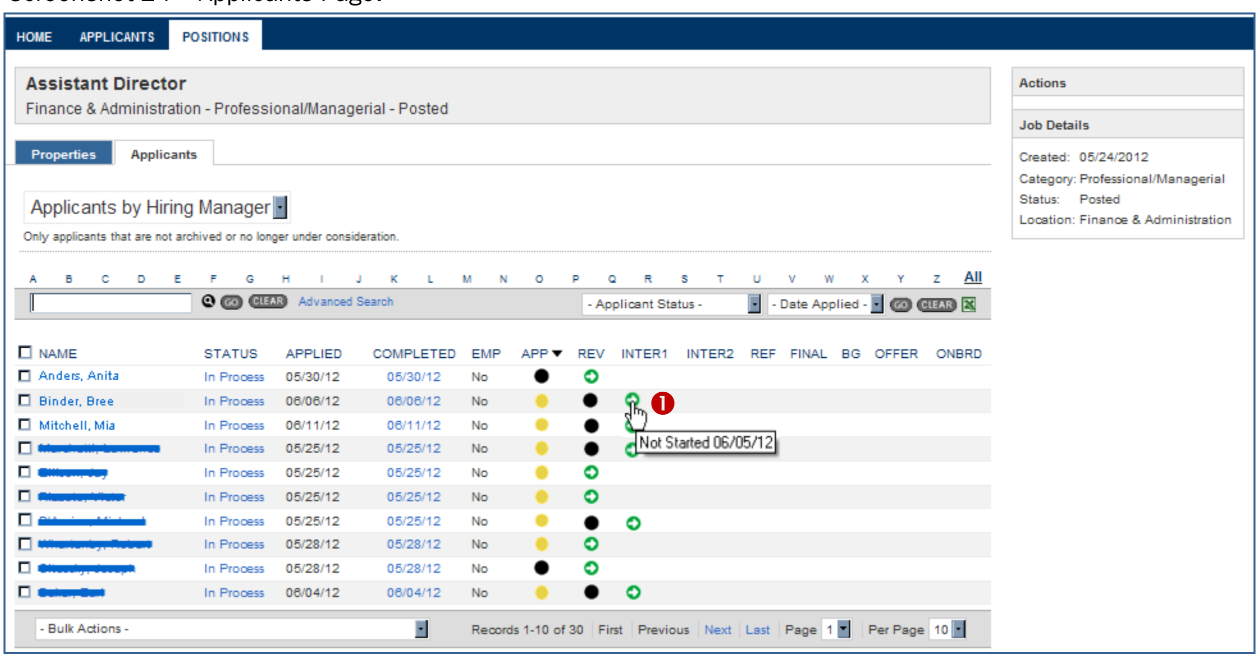
For decentralized searches, the following task may be performed by the hiring manager or delegated to an assigned admin support.

Task 4: Schedule an Interview "Event"

Each interview needs to be documented within the ATS using the "event scheduling" function. This includes preliminary phone interviews as well as campus interviews.

- There should be a ➲ in the INTER1 column for each qualified candidate identified during the screening process; hovering a mouse over the ➲ icon will show the date the current status was applied

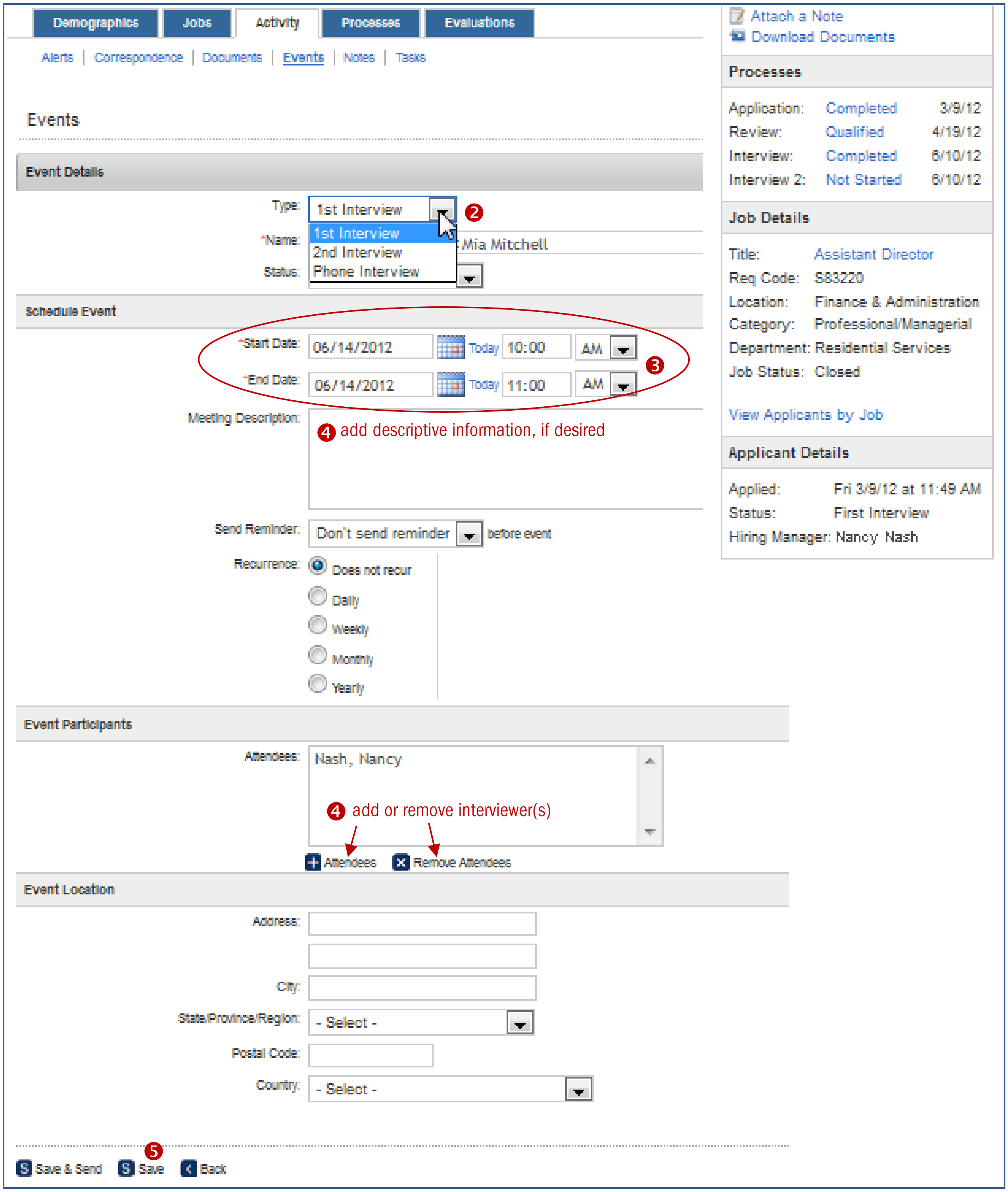
Screenshot 24 – Applicants Page:



- Click the ➲ to schedule the desired candidate for the first or preliminary phone interview [❶]; the event scheduling template opens [Screenshot 25, next page]
- Use the drop-down button to select the appropriate event type [❷]

The default setting is 1st Interview*… be sure to change or confirm event type.*

Screenshot 25 – Events Template:



- ➢ Select the appropriate Start Date, End Date (probably the same date), and times [❸]; review and modify the remaining information, as appropriate [❹]
- ➢ Review and confirm all information in this template; once saved, it cannot be deleted

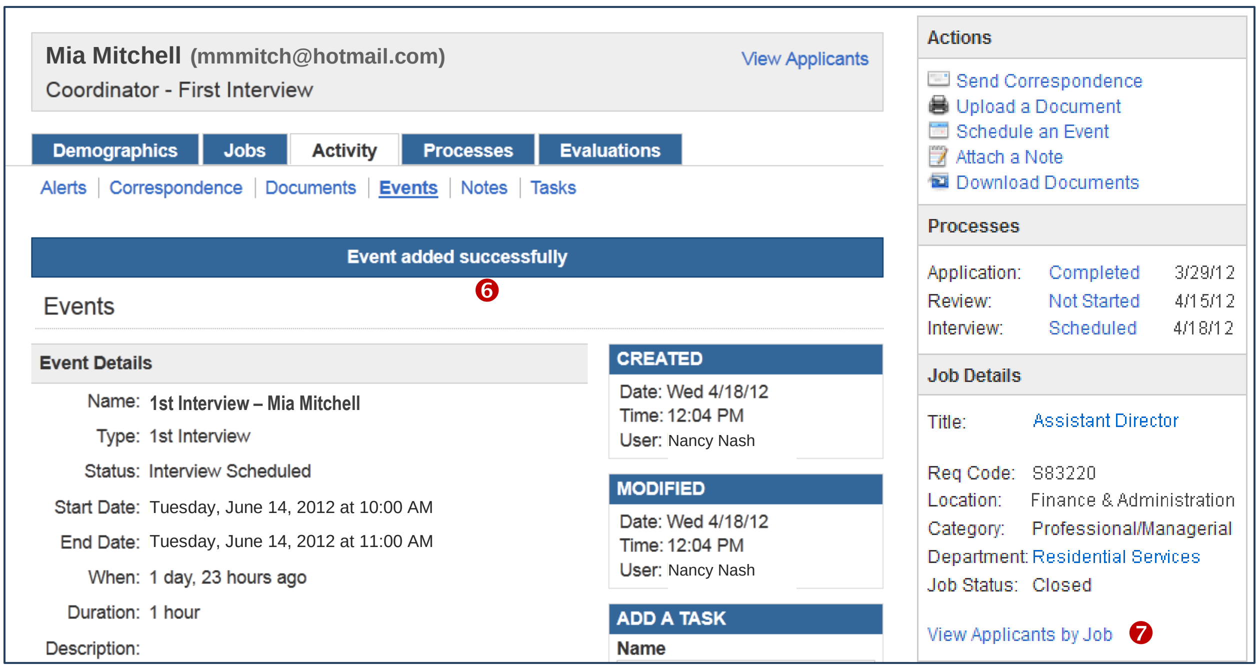
You can reschedule a particular type of event (i.e., first interview, second interview, or phone interview) which will overwrite the previous event of the same type.

- Click Save [❺] or Save & Send

  The Save & Send *option opens up a blank email template addressed to the candidate. This can be helpful if you wish to send a confirmation, directions, or other information regarding the upcoming interview. You can also remove the candidate's email and use the template to send a notice to search committee members or others who will be involved in the interviews. This feature is optional and email correspondence regarding an upcoming interview may be handled separately from the "schedule an event" task. See* [*Task 5: Send Correspondence*].

- Upon saving (not Save & Send), the screen will confirm that the interview event has been added successfully [Screenshot 26, ❻]

Screenshot 26 – Event Confirmation:



- Click on the View Applicants by Job link [❼] to return to the Applicants by Hiring Manager view

- If a phone interview event was entered and saved, there will not be an apparent change on the Applicants by Hiring Manager screen; the will remain in the INTER1 column

  You can verify that the phone interview event has been scheduled by clicking on the applicant's name to bring up the Demographics page. Scheduled events are listed in the Events box. You may need to use the toggle button to view the contents.

- If a first interview event was entered and saved, then a will appear in the INTER1 column; this indicates that a First Interview has been scheduled but not yet completed.

The Events function within the ATS is **not** linked to the university's Google Calendar application. The Events function simply serves as a mechanism to document interview activity for a particular candidate. Hiring managers, search committees, and/or their designated admin support person will need to set up and arrange interviews by contacting the candidate to schedule and confirm a date and time. The personal calendars of those involved in the interviews will need to be updated accordingly.

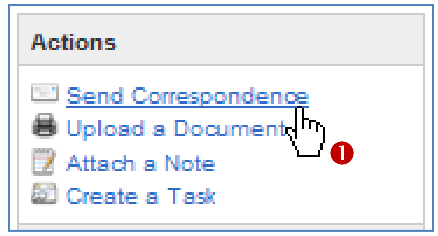
Scheduling the First Interview event in the ATS triggers two automatic emails from the ATS to the hiring manager. The first contains information about conducting interviews and includes an attachment of sample questions based on university success factors. The second email is a reminder to update the search including documenting interviews by attaching notes. The interview information should be shared with the search committee members and/or others involved in the interview process.

Task 5: Send Correspondence

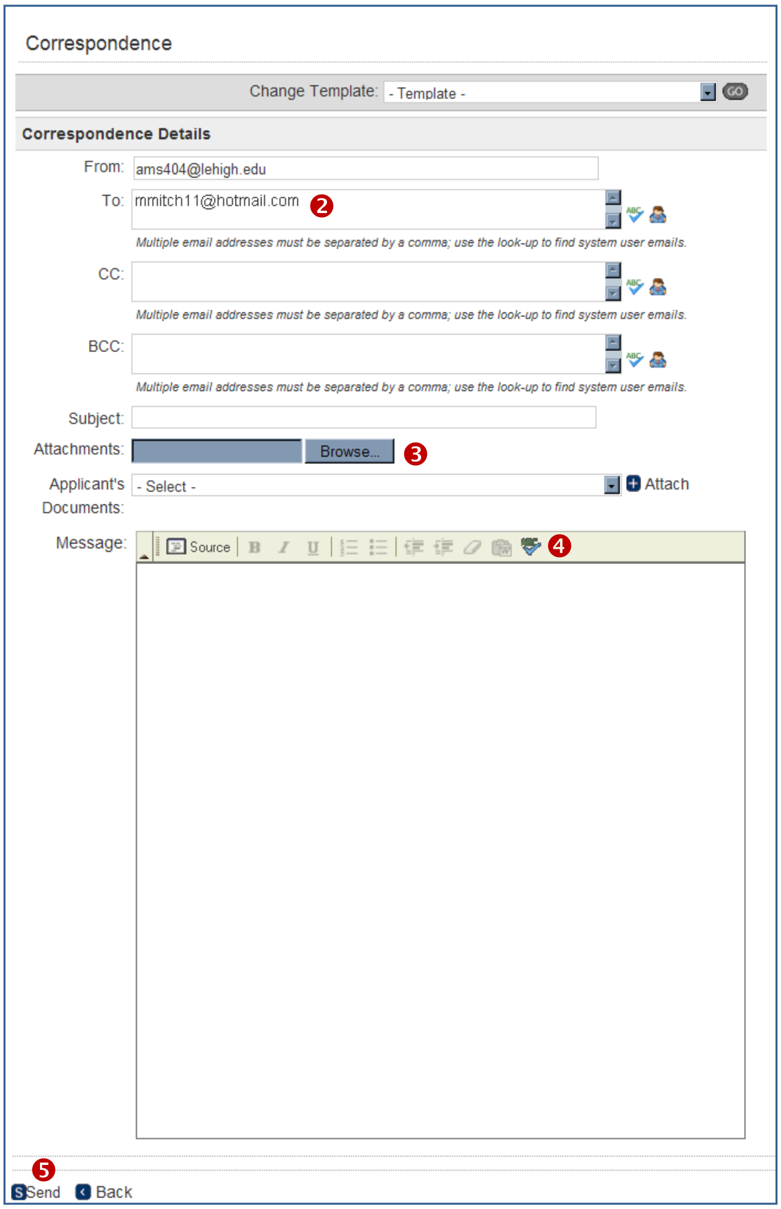
All email correspondence with applicants should be sent though the applicant tracking system using the Send Correspondence link from the Demographics page. Others involved in the interview process may be copied on emails sent through the ATS. Emails may include itineraries, directions, parking instructions, contact names, or other customized information and attachments. This task may be handled by the hiring manager or delegated to an assigned admin support.

- From the Applicants by Hiring Manager screen, click the candidate's name
- The Demographics page for this candidate opens
- In the Actions box at the top of the right menu, click the Send Correspondence link [Screenshot 27, ❶]

Screenshot 27 – Actions Menu:



Screenshot 28 – Blank Email Template:



- A blank email template will appear [Screenshot 28]
- Confirm that the email is addressed to the desired candidate [❷]
- In each of the provided fields, enter the desired information
- Add desired attachments (e.g., itinerary, directions, etc.) [❸]
- Spell check the message [❹]
- When finished, click Send [❺].

Correspondence sent through the ATS will appear to come from the hiring manager, regardless of who actually performs this task.

The Actions box appears top right on the Applicants by Hiring Manager screen and the Demographics page. Actions initiated from the Applicants by Hiring Manager screen are generic to the search. Actions initiated from an applicant's Demographics page are specific to that applicant's record.

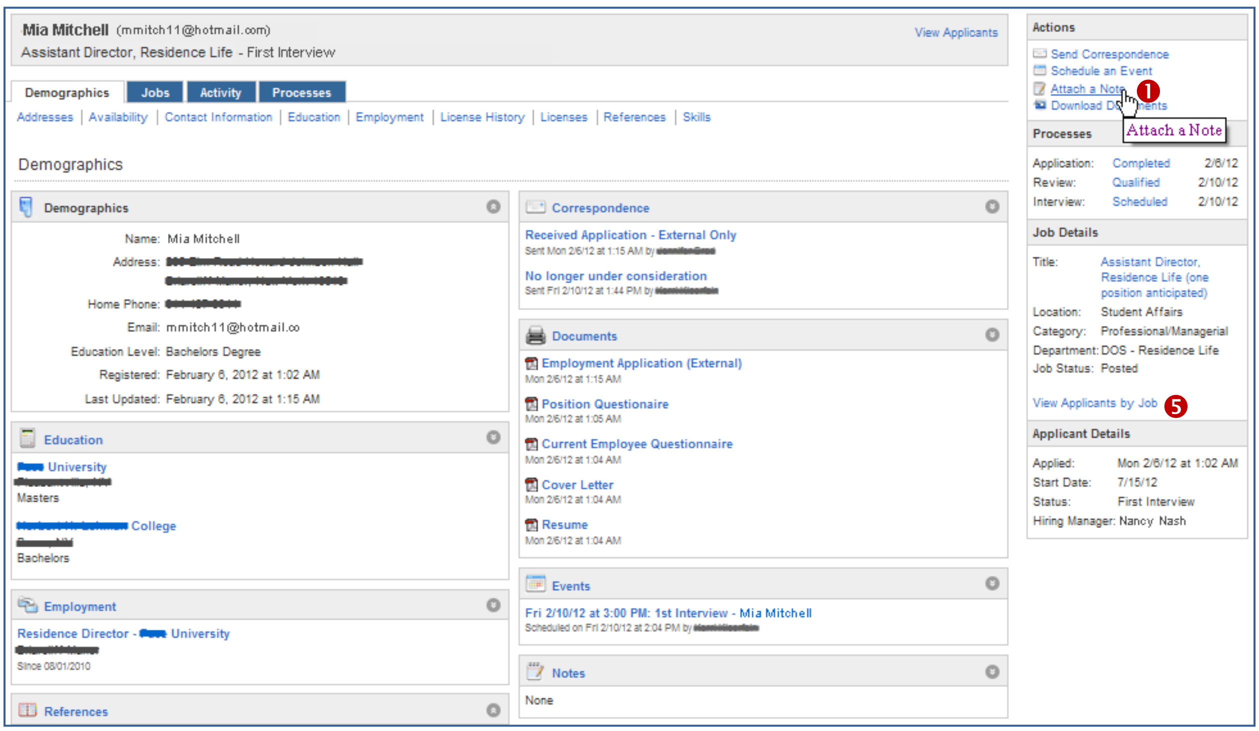
Task 6: Add a Note

After conducting each phone interview and/or first campus interview, a note must be added to the candidate's information to document the result of the interview. Each note is dated and time stamped along with the name of the person who entered the note in the ATS. This task is usually performed by the hiring manager or delegated to an assigned admin support. When multiple members of a search committee are involved in the interviews, it is generally recommended that the interviewers meet after each interview to reach a consensus finding and then designate one person to enter a single note into the ATS to record the interview result.

Here's how to add a note to a candidate's record:

- ➢ From the Applicants by Hiring Manager screen (POSITIONS tab/Applicants page), click on the name of the candidate who was interviewed
- ➢ The candidate's Demographics page in the APPLICANTS tab opens [Screenshot 29]

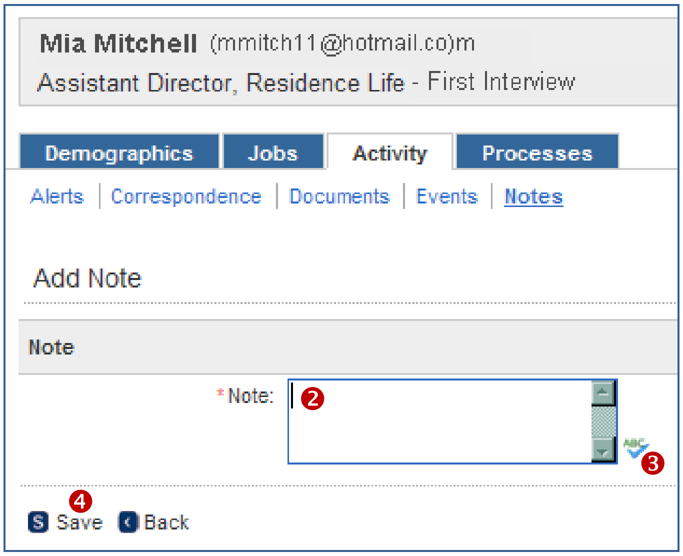
Screenshot 29 – Demographics Page of Applicants Tab:



- ➢ In the Actions box, click on the Attach a Note link [❶]

- A small Add A Note window will open [Screenshot 30]

Screenshot 30 – Actions/Add A Note Window:



- Type a short note in the space provided [Screenshot 30, ❷]
- Use the spell check feature [❸] to catch spelling errors
- Click on Save [❹] to record your note; the window will close

Carefully review the spelling and content of your note before saving. Once saved, the note cannot be edited. Another note can be added, if desired, to provide additional information or clarification. Saved notes can be deleted, if necessary, but only by HR.

- Once back on the Demographics page, click on the View Applicants by Job link [Screenshots 29, ❺, previous page] to return to the applicants list.

Also attach a note to the candidate's record if the interview was cancelled and/or needed to be rescheduled. Include a reason for the cancellation or change.

To reschedule an interview, repeat the task of scheduling an event [See Task 4, pages 26-27].

Attached notes are discoverable in the event of an employment audit, discrimination charge, or other legal action. Notes should be limited to a simple, factual determination – e.g., "Proceed with second interview; candidate qualifications match position requirements" OR "Not interested in pursuing; candidate is not a close enough match with position requirements."

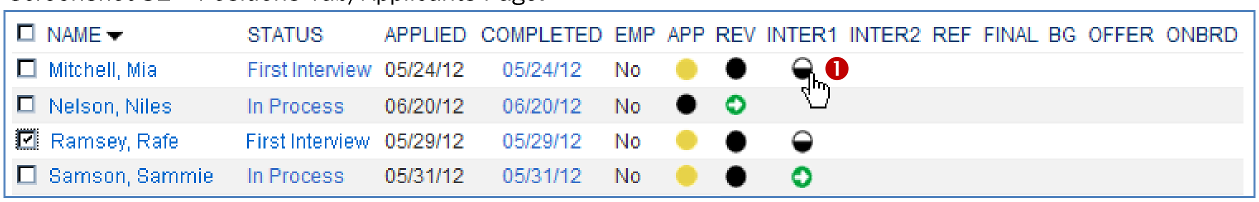
Task 7: Complete the Interview "Event" (First Interview)

This task pertains to the First Interview (and Second Interview) event only. There is no completion task within the ATS for a preliminary phone interview. Once the phone interview has occurred and a note has been added to the candidate's record in the ATS, this event is considered complete. However, after conducting the first campus interview, there is a specific action that must be taken to complete the First Interview step within the ATS. This task is performed by the hiring manager or may be delegated to an assigned admin support.

For candidates who **qualify to move forward** to the next step in the process:

- From the Applicants by Hiring Manager screen, click the icon [1] in the INTER1 column for the candidate who was interviewed

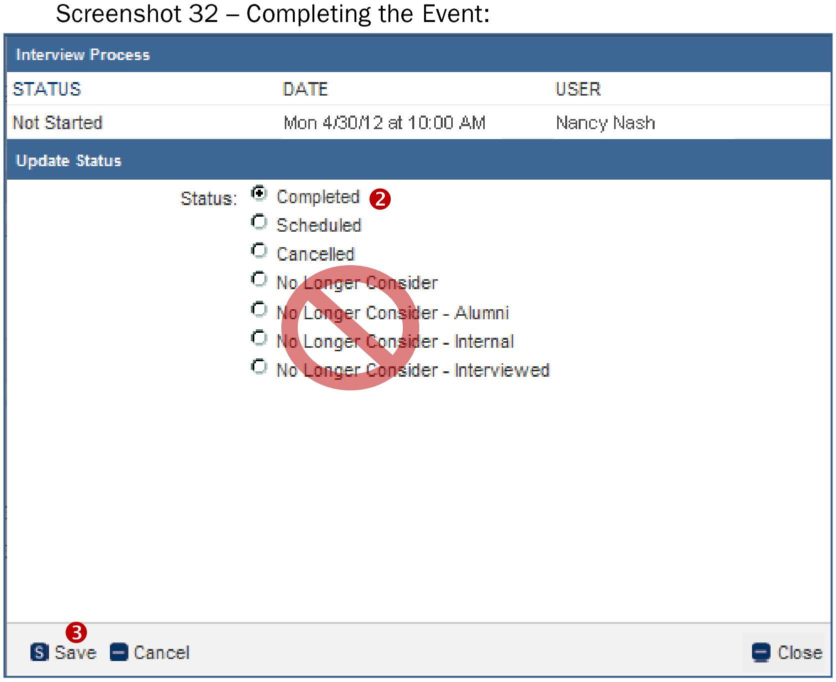
Screenshot 31 – Positions Tab/Applicants Page:



NAME	STATUS	APPLIED	COMPLETED	EMP	APP	REV	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
Mitchell, Mia	First Interview	05/24/12	05/24/12	No			1						
Nelson, Niles	In Process	06/20/12	06/20/12	No									
Ramsey, Rafe	First Interview	05/29/12	05/29/12	No									
Samson, Sammie	In Process	05/31/12	05/31/12	No									

- An Update Status window opens [Screenshot 32]

Screenshot 32 – Completing the Event:



- Select Completed [2]
- Click Save to close window [3].

Although there are several "No Longer Consider" options available, using one of these choices automatically sends a "regrets" email to the candidate without any opportunity to review or edit the content. Most hiring managers prefer to use the bulk actions method of removing interviewed candidates from further consideration.

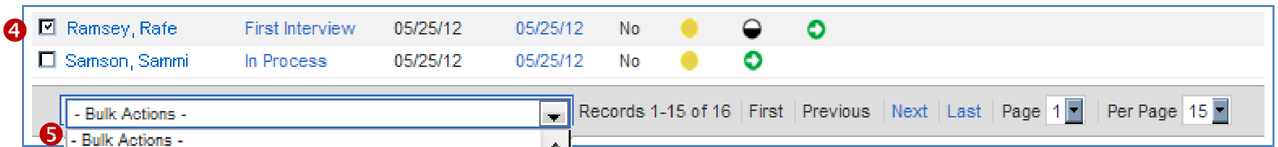
Once the First Interview step is completed, the icon changes to ● in the INTER1 column and the action icon moves to the INTER2 column for this candidate.

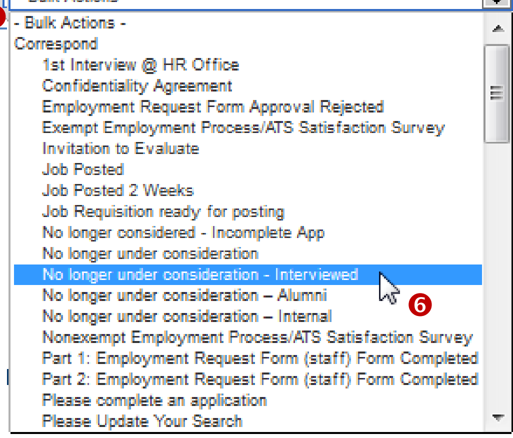
The Update Status window can also be used to indicate that a planned interview was cancelled. Follow the same steps outlined above except select Cancelled instead of Completed.

For candidates who will **definitely NOT be moving forward** to the next step:

- From the Applicants by Hiring Manager screen, click the radio button [❹, Screenshots 31 and 33] next to the candidate who was interviewed but is no longer under consideration for the position

Screenshot 33 –Bulk Actions to remove candidates:





- Then click the Bulk Actions drop-down [❺] at the bottom of the Applicants by Hiring Manager screen
- Select "No longer under consideration – Interviewed" [❻] from the menu choices.

- A "Send correspondence to selected applicant(s)?" message will appear to verify this is the desired action
- Click OK to continue; this will NOT automatically send the email
- A new window opens with a standard "no longer " email template
- Edit the message, as desired, to customize it for the interviewed candidate(s)
- Review and spell check the message
- Click the Send option to send "regrets" to the selected candidate

  If multiple recipients were initially selected, use the Send to All option instead
- Another "Send correspondence to selected applicant(s)?" message will appear to verify this is the action you wish to take; click OK to send the email.

  Once the email is sent, the selected candidate(s) will be removed from your view.

The First Interview step must be completed in order to schedule a candidate's Second Interview event in the system. Some departments conduct preliminary phone interviews and then bring selected, qualified candidates on-site for a series of interviews on a single day… essentially eliminating a distinct "first" interview. In this scenario, follow the procedures detailed above but use the same start/end dates for both of the interview events. Add a note for each candidate stating that only one campus visit occurred. Please contact HR (83916) if assistance is needed.

Second Interview(s)

Once the First Interview step has been completed, it's time to select the top two or three candidates whose qualifications best match the position's requirements. This is the responsibility of the hiring manager based on the results of the first interviews or on a search committee's recommendations. The hiring manager or assigned admin support will need to set up and arrange the next round of on-campus interviews in the usual manner, including contacting the candidate to confirm a date and time.

The Second Interview may be a single interview with the hiring manager, a group interview with a search committee or a series of individual or small group interviews. Other departmental staff may be asked to participate, as appropriate. Within the ATS, multiple interviews are considered a single Second Interview event.

The Second Interview event is scheduled, documented, and completed following the same procedures used for the First Interview event.

Task 8: Schedule an Interview "Event" (Second Interview)

On the Applicants screen, there should now be a ➲ in the INTER2 column for each candidate who successfully completed the First Interview:

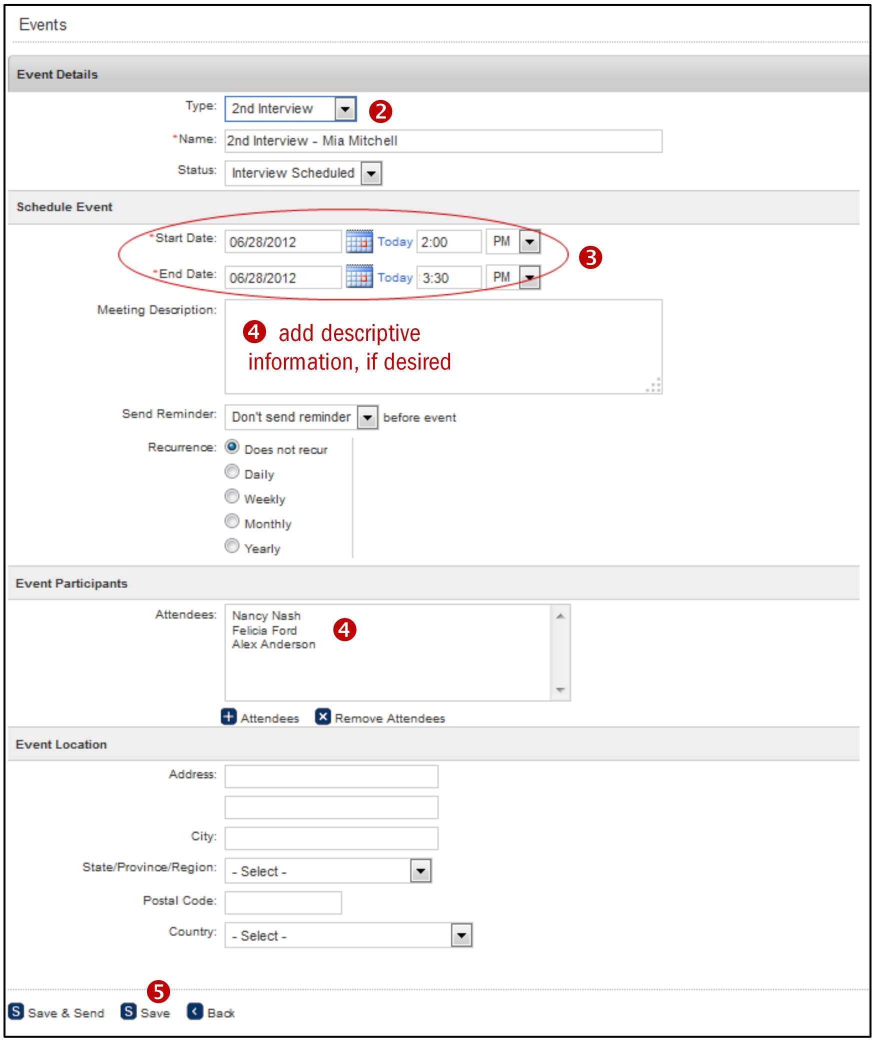
Screenshot 34 – Applicants by Hiring Manager screen:

NAME	STATUS	APPLIED	COMPLETED	EMP	APP	REV	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
Anders, Anita	In Process	07/01/12	07/02/12	No	●	●	➲						
Binder, Bree	First Interview	06/29/12	06/29/12	No	●	●	●	➲					
D'Amico, Daryl	In Process	07/03/12	07/03/12	No	●	➲							
Firestone, Frieda	In Process	06/30/12	07/01/12	No	●	➲							
Gomez, Greg	In Process	07/05/12	07/05/12	No	●	●	➲						
Huang, Harry	In Process	07/05/12	07/05/12	No	●	➲							
Jackson, Jared	In Process	07/03/12	07/03/12	No	●	●	➲						
Klinger, Kalhil	In Process	07/05/12	07/05/12	No	●	➲							
Lewis, Letisha	In Process	06/29/12	06/29/12	No	●	➲							
Mitchell, Mia	First Interview	07/02/12	07/02/12	No	●	●	●	➲ ❶					

- Bulk Actions - Records 1-10 of 30 First Previous Next Last Page 1 Per Page 10

- Click the ➲ in the INTER2 column [❶] to schedule the desired candidate for the Second Interview
- The events template opens [Screenshot 35, next page]

Screenshot 35 – Events Template:



- Change the type of event to 2nd Interview [❷]
- Change the Start Date, End Date, and times; review and modify other information as appropriate [❸]
- Review and confirm all information on the Events Detail screen [❹]

  Once saved, it cannot be deleted although it can be overwritten by scheduling another Second Interview event.

- Click Save [❺] or Save & Send
- Upon saving (not Save & Send), the screen will confirm that the interview event has been added successfully

The Save & Send option opens up a blank email template addressed to the candidate. This can be helpful if you wish to send a confirmation, directions, or other information regarding the upcoming interview. You can also remove the candidate's email and use the template to send a notice to search committee members or others who will be involved in the interviews. This feature is optional and email correspondence regarding an upcoming interview may be handled separately from the "schedule an event" task. See *Task 9: Send Correspondence**.*

- Return to the Applicants by Hiring Manager screen by clicking on the View Applicants by Job link in the right hand menu (Job Details box)
- You will now see a ◒ in the INTER2 column; this indicates that a Second Interview has been scheduled but not yet completed.

Task 9: Send Correspondence (Second Interview)

Email correspondence with a candidate regarding an upcoming second interview should be sent using the Send Correspondence link from the candidate's Demographics page. Others involved in the interview process may be copied on emails sent through the ATS. Email correspondence may include itineraries, directions, parking instructions, contact names, or other customized information and attachments.

Refer back to Task 5: Send Correspondence (page 29) for directions on sending correspondence to candidates, search committee members, and/or others from within the applicant tracking system.

Task 10: Add a Note (Second Interview)

During the interview(s), interviewers may keep written notes in any manner desired. However, the interview results need to be documented within the ATS. With small search committees, each member can add a note documenting the result of the interview in which he/she participated. Larger committees are encouraged to meet to develop a consensus opinion regarding the interview result. Alternatively, a designated person (e.g., hiring manager, admin support, or committee member) can collect feedback from each interviewer. A single summary note provides sufficient documentation. Each note is dated and time stamped along with the name of the person who entered the note.

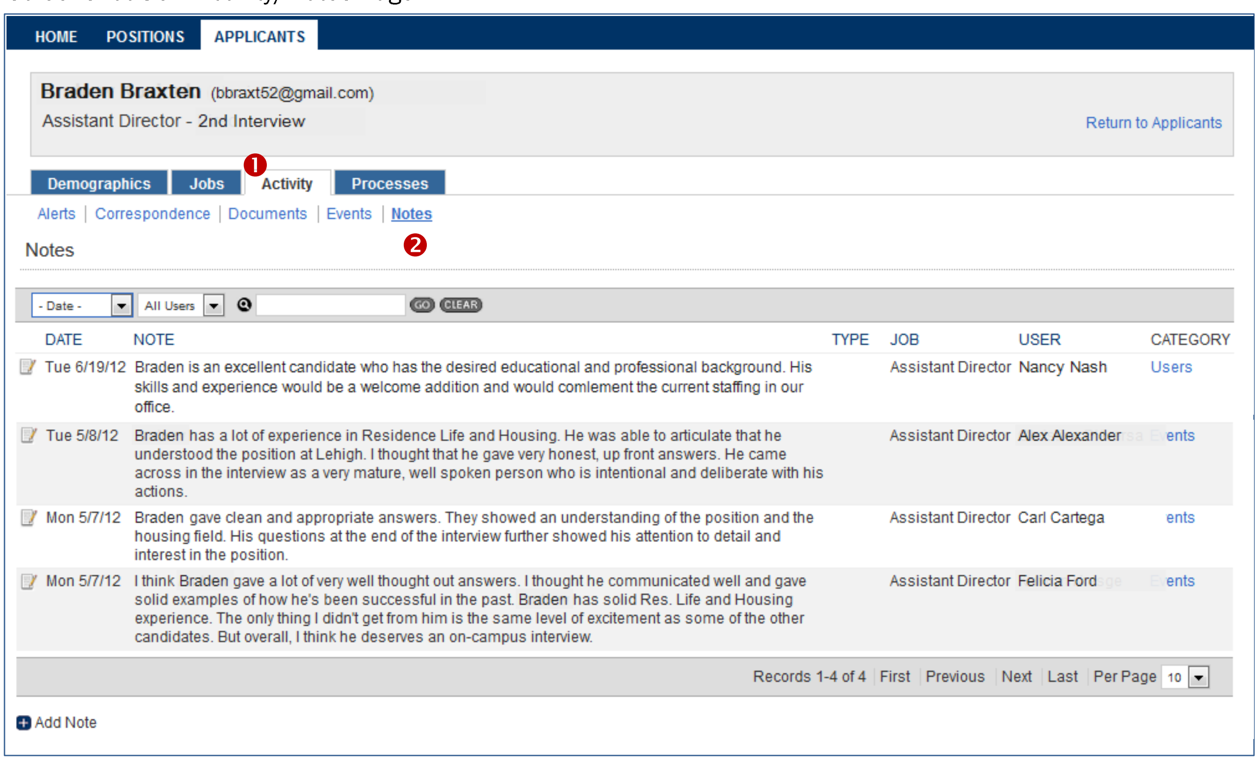
Refer back to Task 6: Add a Note (pages 30-31) for directions on adding a note.

Due to their discoverable nature, notes entered into the ATS should contain a simple, factual determination only – e.g., "Finalist for position; candidate qualifications best match position requirements" OR "Not a finalist for the position; candidate is not the best match for position requirements." Anyone who will be adding notes within the ATS should be instructed accordingly.

To see a list of all notes entered about a particular candidate [Screenshot 36]:

- Click on the candidate's name from the Applicants by Hiring Manager screen; the Demographics page will appear by default
- Click on the Activity page tab [❶] and then the Notes sub-heading [❷].

Screenshot 36 – Activity/Notes Page:



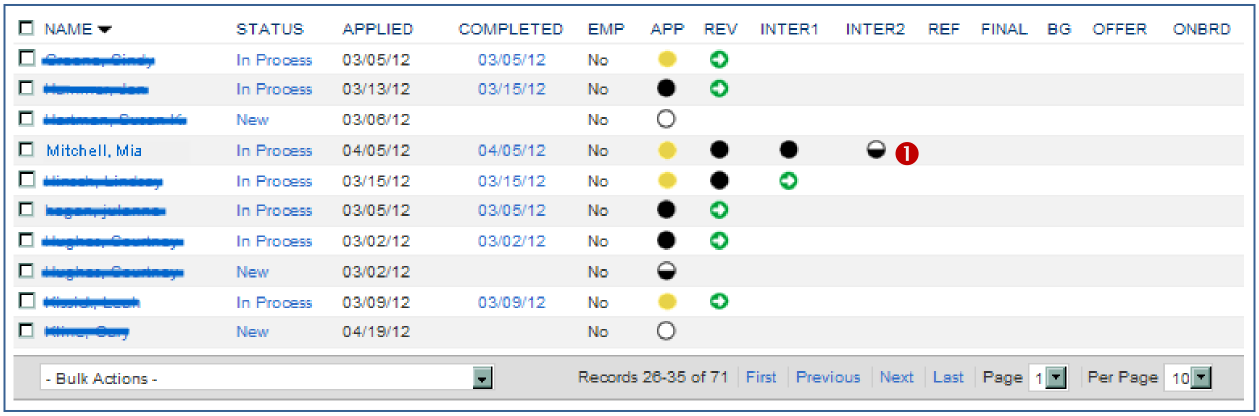
Task 11: Complete the Second Interview "Event"

After the Second Interview(s) is(are) finished and the result(s) entered as notes, the Second Interview step needs to be completed within the ATS. This can be done by the hiring manager or delegated to an assigned admin support.

For candidates who **qualified as possible finalists** for the position:

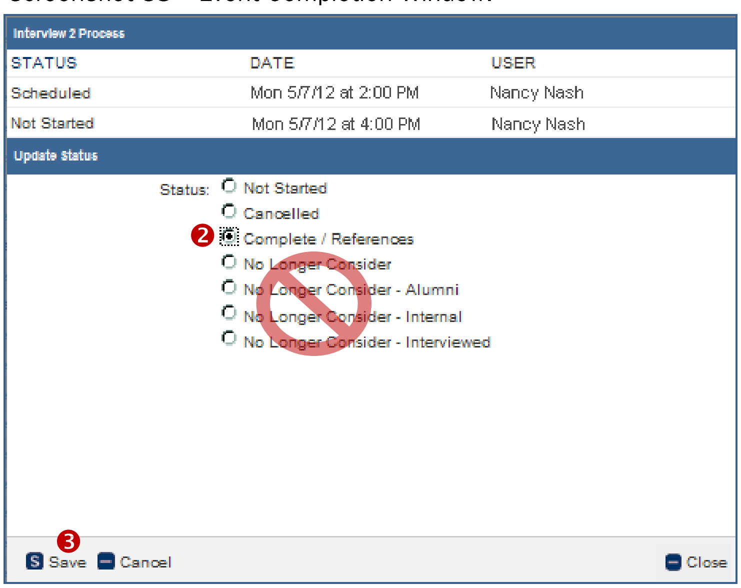
➢ From the Applicants by Hiring Manager screen [Screenshot 37], click the ◒ icon [❶] in the INTER2 column for the candidate who was interviewed

Screenshot 37 – Applicants by Hiring Manager Screen:



NAME	STATUS	APPLIED	COMPLETED	EMP	APP	REV	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
[redacted]	In Process	03/05/12	03/05/12	No									
[redacted]	In Process	03/13/12	03/15/12	No									
[redacted]	New	03/06/12		No									
Mitchell, Mia	In Process	04/05/12	04/05/12	No				❶					
[redacted]	In Process	03/15/12	03/15/12	No									
[redacted]	In Process	03/05/12	03/05/12	No									
[redacted]	In Process	03/02/12	03/02/12	No									
[redacted]	New	03/02/12		No									
[redacted]	In Process	03/09/12	03/09/12	No									
[redacted]	New	04/19/12		No									

Screenshot 38 – Event Completion Window:



➢ The Update Status window will open [Screenshot 38]

➢ Select Complete/References [❷]

➢ Click Save to close window [❸].

After the Second Interview step is completed, the ◒ icon changes to a ● in the INTER2 column and the action ➲ icon moves to the REF (references) column for this candidate.

The Second Interview step must be completed in order to move on to the References step.

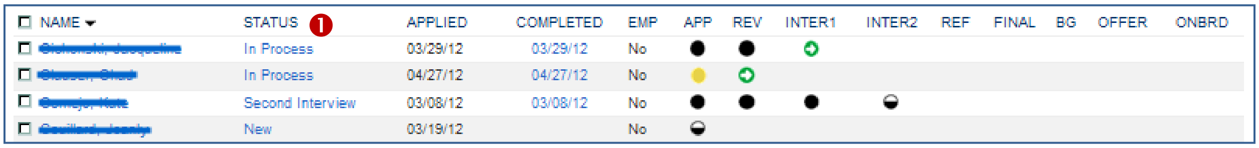
For candidates who will be **no longer considered** for the position:

➢ Follow the same procedure, using the bulk actions option, as detailed on page 33.

Task 12: Voluntary Withdrawals

Included on the Applicants by Hiring Manager screen [Screenshot 39, ❶] is a STATUS column that shows the current status of all applicants listed. As the committee works its way through the various process steps, the status of the various candidates will change.

Screenshot 39 – Applicants by Hiring Manager Screen:



NAME	STATUS ❶	APPLIED	COMPLETED	EMP	APP	REV	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
[redacted]	In Process	03/29/12	03/29/12	No									
[redacted]	In Process	04/27/12	04/27/12	No									
[redacted]	Second Interview	03/08/12	03/08/12	No									
[redacted]	New	03/19/12		No									

Sometimes a candidate will withdraw from the process or accept another position. This status change needs to be documented and the candidate removed from the visible applicant pool. This task may be done by the hiring manager or delegated to an assigned admin support. Here's how to change the candidate's status:

First, add a note to the candidate's record (required only for withdrawals):

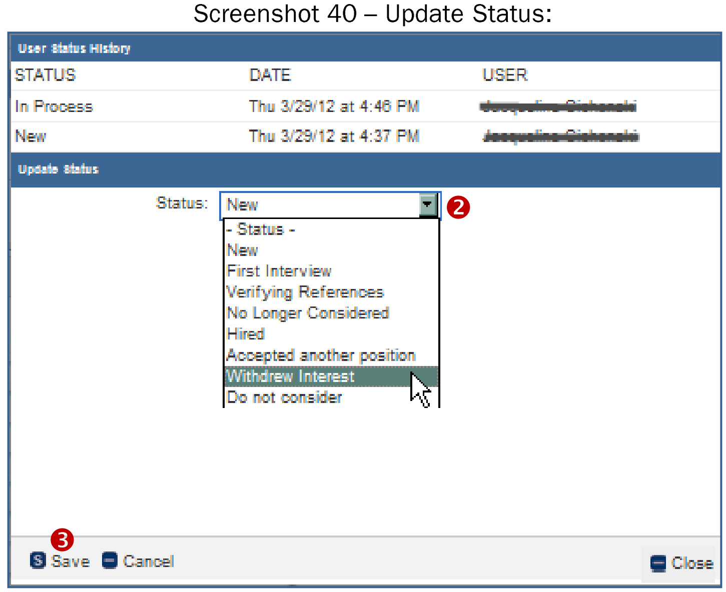
- ➢ From the Applicants by Hiring Manager screen, click on the name of the candidate who was interviewed; this brings up the candidate's Demographics page [Screenshot 29, page 30]
- ➢ In the Actions box (top right menu), click on the Attach a Note link [Screenshot 30, page 31]
- ➢ Type a short note; review spelling and content for errors
- ➢ Click on Save to record the note.

Next, change the status for this candidate to indicate that he/she withdrew interest or accepted another position:

- ➢ Click the candidate's current status [❶]; a status window opens [Screenshot 40]
- ➢ Use the drop-down button to select the new status [❷]
- ➢ Click Save [❸].

Changing the status to "accepted another position" or "withdrew interest" will not trigger an automatic email notification. No correspondence needs to be sent to the candidate.

Screenshot 40 – Update Status:



Selection of Finalist(s)

Once the on-campus interviews are complete, it's time to review overall qualifications to determine the best match for the open position. The hiring manager and/or the search committee will need to select the finalist(s) and check references. References are typically done only on the top finalist although there may be another qualified candidate. References on both finalists may be the final deciding factor as to which candidate gets the job offer.

Reference Checks

Reference checks are the responsibility of the hiring manager or a designated search committee member. It is generally best practice to have one person conducting all of the reference checks.

A ➲ in the REF column indicates that the hiring manager and/or committee is ready to proceed with reference checks on this finalist. The hiring manager will receive an email from HR [Screenshot 41] that outlines the procedure to follow along with attached information and tips for conducting reference checks.

This automatic email from HR is triggered when the Second Interview *event is completed and the "Complete / References" option from the event completion window is selected for a particular candidate. [Refer back to* Screenshot 38, *page 38].*

Screenshot 41 – Reference Checks Information Email:

Hello,

An integral part of any search process is conducting reference checks on applicants. As the hiring supervisor, it is your responsibility to conduct detailed reference checks. Some suggestions for effective work reference checks include:

- Notify the job applicant that references will be checked as part of the selection process.
- Focus on employment references, especially recent supervisors.
- Ask the same job related questions about each applicant.
- Prior to conducting the reference check, prepare a guide to be used during the phone conversation. I have attached a guide for your reference.

The most effective approach in evaluating references is to view them as just one of the factors to consider when making your final decision. I have attached a **Reference Check** form that you can follow when conducting references on the candidates and also some **Tips for Getting References**.

Once you have completed the reference checks and they are satisfactory, please contact me so that we can discuss the next steps including starting salary. You may contact your candidate of choice and offer them the position after we discuss the starting salary and start date. If you have any questions about reference checking, please feel free to contact me at ext: 8-3916 or via email.

Candidates are requested to supply the names of references as part of their application process. At least two positive work-related references are needed before a finalist can be approved for hire. Current and/or former supervisors of the candidate are the preferred references. Former co-workers or others who knew the candidate in some sort of professional capacity are acceptable alternatives. A reference check form provided by HR to the hiring manager includes a list of appropriate questions to ask.

Verbal Offer of Employment

Once the requisite reference checks have been completed for the finalist(s) and the hiring manager and search committee are satisfied with the results, it's time to move on to the final steps of the hiring process. If there was more than one finalist, the top finalist must be identified. At this point, the hiring manager needs to notify HR regarding the results of this search

Upon satisfactory completion of the reference checks, HR (and only HR!) will change the finalist's status within the ATS to Final. If any job-related skill tests were requested during the initial search consultation, the finalist will be asked to complete these tests at this time.

Within the Applicants by Hiring Manager screen, a black circle ● will appear in the Final column for the selected finalist and a green arrow ➲ will appear in the BG (background checks) column.

A verbal offer of employment, contingent upon successful completion of background checks, may be made at this time. However, the terms and conditions of employment and the starting salary must be discussed with and approved by HR ***BEFORE*** a verbal offer is extended. The following elements must be considered:

- Work schedule – start time/end time, hours per week/month, and months per year
- Start date – expected date of hire; transition period if hiring an internal candidate, etc.
- Starting salary – desired salary offer, chosen by the hiring manager upon consultation with HR
- Other – relocation, duration of appointment if soft money funding, sign on bonus, moving expenses, etc.

The search records within the ATS must be updated before a verbal offer will be approved. Only the finalist(s) should remain visible on the Applicants by Hiring Manager screen. All other candidates no longer under consideration should be notified by using the bulk actions email template.

Once the terms of employment are approved, it is the responsibility of the hiring manager to extend the verbal offer.

Task 13: Update the Search

Although many applicants and candidates were removed from further consideration at various points in the search process, there will probably still be some “maybe” candidates or finalist runner-ups in the system. It is important that the status of all non-finalists be changed to “no longer considered” and notified of their status regarding the position. This process can be started and continued at any time while the search winds down to its conclusion but the visible applicant pool should consist of only the finalist(s) once the search has reached the background checks step and a verbal offer of employment is anticipated.

It is the responsibility of the hiring manager or delegated admin support to update the search records and send correspondence to non-finalists. There are four different versions of the “no longer under consideration” email template available for use within the ATS:

- “No longer under consideration” template which is used for applicants with no Lehigh affiliation and who were not interviews
- “No longer under consideration – Interviewed” template which is used to notify all non-finalists who were interviewed, regardless of Lehigh affiliation
- “No longer under consideration – Alumni” template which is sent to non-interviewed applicants who happen to be Lehigh alumni; this email provides links to career services provided through the Lehigh Alumni Association
- “No longer under consideration – Internal” template which is sent to non-interviewed internal applicants (i.e., current Lehigh employees).

Standard message content for each of the above email templates is provided in the attached appendices. Each template can be edited and customized as desired. By default, the hiring manager’s name is included in the closing of the message so that all correspondence appears to come from the hiring manager.

Here are the action steps to update the search:

➢ Use the Applicants by Hiring Manager screen [Screenshot 42]

Screenshot 42 – Applicants by Hiring Manager Screen:

- Start by clicking the selection box [Screenshot 42, ❶, previous page] next to each candidate to be removed from the visible applicant pool

  Do this by batches – e.g., start with any external/no Lehigh affiliation applicants who were not interviewed; then internal/alumni applicants who were not interviewed, and so forth.

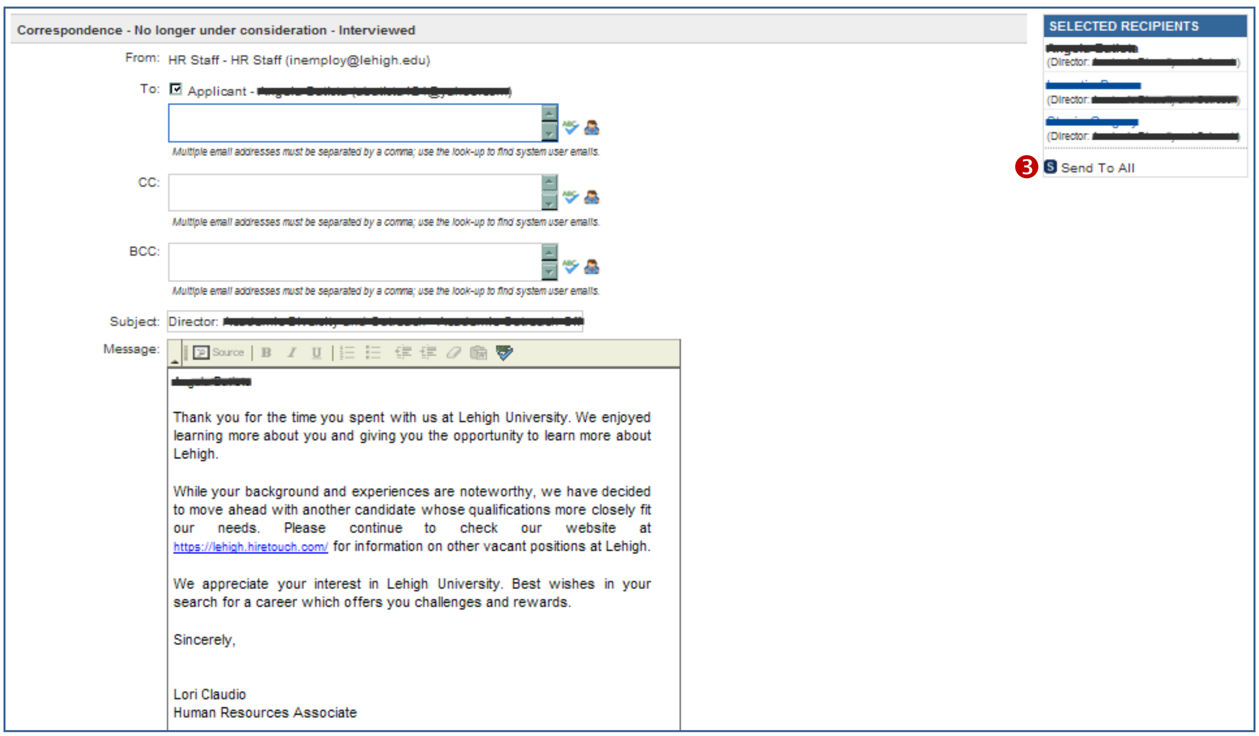
  Internals will have a "yes" in the EMP column. Identify alumni by clicking the applicant's name and reviewing the education information in the applicant's Demographics page.

- Select the appropriate bulk action from the drop-down menu [Screenshot 42, ❷]:
  - No longer under consideration
  - No longer under consideration – Interviewed
  - No longer under consideration – Alumni
  - No longer under consideration – Internal

  Be sure to select the right template for each group of applicants/candidates to be removed.

- A "Send correspondence to selected applicant(s)?" message will appear to verify that this is the desired action; click OK

Screenshot 43 – Bulk Email Template (No longer under consideration – Interviewed):



- Personalize and/or edit the content of the email message, if desired, and as appropriate
- Remember to select the Send to All [❸] button to send the email notification to all selected recipients; a confirmation message will appear
- Once the email template closes, the screen will return to the Applicants by Hiring Manager screen and this group of applicants/candidates will disappear from view.

Background Checks

Background checks are handled by HR. Standard checks on all external finalists include social security number verification, education verification, and a county and national criminal background check. Pennsylvania Act 153 checks (PATCH, child abuse clearance, and FBI fingerprints clearance) may also be required. Additional checks may be conducted, depending on the requirements of the position – e.g., a credit check for positions with fiduciary responsibility. Some of these additional background checks may also be done on internal finalists if appropriate for their new position within Lehigh. Relevant background checks are decided upon during the initial consultation between the hiring manager and HR.

The background checks process is initiated by HR as soon as a finalist accepts a verbal offer of employment. The hiring manager will be notified by HR as soon as the background checks are complete.

Background checks involve confidential information and prevailing privacy regulations limit the amount and type of information that may be shared with hiring managers, search committee, or others.

The hiring manager will be told if the background checks raise any red flags regarding the finalist but without providing specific details. Problems arising from the background checks and the possible impact on the hiring decision will be discussed with the hiring manager to reach a determination regarding the search outcome.

The Employment Offer

Notice that the green arrow in the previous screenshot [Screenshot 46] is now in the OFFER column for the finalist. At this point, a written offer letter will be prepared by HR based on the terms of employment (i.e., work schedule, start date, salary, etc.) that were previously discussed and agreed upon. HR sends the written employment offer to the finalist via the Send Correspondence function within the ATS.

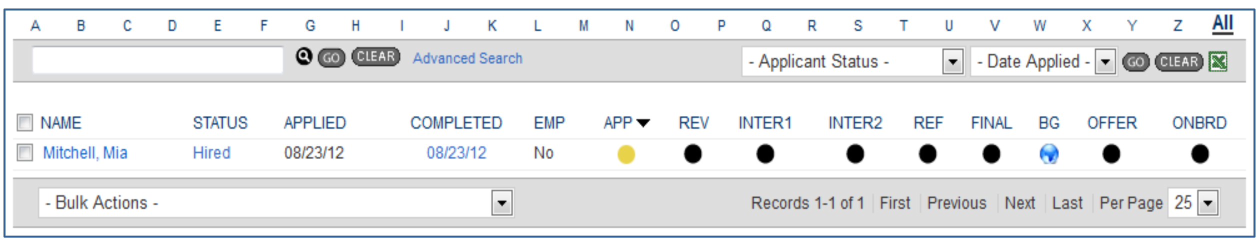
Once a signed copy of the offer letter is sent, HR then sends an email to the new hire with onboarding information. The hiring manager will also receive an email from HR containing information for onboarding the new hire.

The progress of the offer and onboarding steps can be monitored by checking the Applicants by Hiring Manager screen:

- A filled ● circle in the OFFER column indicates that the written offer letter has been sent to the finalist
- A green arrow in the ONBRD column indicates that the finalist is ready to receive onboarding information
- A filled ● circle in the ONBRD column indicating that this hiring process is complete.

With respect to the ATS, there should now be only one name remaining in the applicants list [Screenshot 44]. If not, finish updating the search. See [Task 13: Update the Search](#), page 42.

Screenshot 44 – Applicants by Hiring Manager Screen/Search Complete



Closing Comments

At the conclusion of the search, hiring managers, search committee members, and assigned admin support staff will be sent a survey requesting feedback regarding their individual experiences using the ATS as well as their satisfaction regarding the entire employment process. We hope each ATS user will take the time to respond to the survey. This feedback is very important to us in order to provide the best support and service possible to all hiring managers and other ATS users.

This User's Guide for Admin Support staff focuses on the specific tasks associated with utilizing the HireTouch applicant tracking system (ATS) for conducting a de-centralized open position search. Alternate versions of this User's Guide are available for hiring managers (one for centralized searches; another for decentralized searches) and search committees.

Additional information and resources on diversity recruitment, what to look for when screening applications, conducting behavioral based interviews, checking references, and other topics are available from the HR Office. Contact the HR Associate: Employment (83900 or inemploy) for assistance.

Addendum – Commonly Used Email Templates

The following pages illustrate the email templates that are used to correspond with job applicants through the Applicant Tracking System.

Please Complete an Application

This email template is sent to applicants who have indicated their interest in the position but who have not completed the online application process. It includes a warning that the incomplete application will be removed after one week.

In order to be considered as an applicant you must submit a completed employment application in our on-line application system.

Currently, your application is incomplete and will be removed from consideration for this position in one week's time if no additional action taken to complete the application.

Please go to https://lehigh.hiretouch.com/ to complete your application for the above referenced position.

In order to complete your application, you will need to:

- Log into your profile
- Select the start link under the title of the position that you have applied to and continue the application process
- Once you complete the application (**which includes the application, position questionnaire, and affirmative action form**), you can upload any documents you choose (resume, cover letter, etc.)

Some things to remember:

- You can always change/update your profile
- Once an application/document is submitted, you cannot make changes to it
- You will receive emails throughout the process updating you on your status and other important information so it is extremely important to keep your email address current within the system.

Thank you for your interest in employment with Lehigh University.

No Longer Under Consideration – Incomplete Application

One week after sending the initial "Please Complete An Application" email, the following "No Longer Under Consideration – Incomplete App" email template may be sent to applicants who have taken no further action to complete the application process.

> Dear [[Applicant First Name]] [[Applicant Last Name]],
>
> Thank you for your interest in employment at Lehigh University. Applications must be complete in order to be considered for a position. An email was sent previously advising you of the incomplete status of your application for the above referenced position. After at least a week of no apparent action on your part, we are removing your incomplete application from this particular applicant pool.
>
> You can continue your job search by visiting our website at https://lehigh.hiretouch.com/ for information on other vacant positions at Lehigh.
>
> Best wishes in your search for a job that offers you challenges and rewards.
>
> Thanks,
> [[Job Contact First Name]] [[Job Contact Last Name]]

No Longer Under Consideration

This generic email template is sent to applicants who were not interviewed and who have no apparent Lehigh affiliation as an alumnus or internal applicant.

Dear [[Applicant First Name]] [[Applicant Last Name]],

Thank you for your interest in employment at Lehigh University. While your background and experiences are noteworthy, we have decided to move ahead with other candidates whose qualifications more closely fit the department's needs.

You can continue your job search by visiting our website at https://lehigh.hiretouch.com/ for information on other vacant positions at Lehigh.

Best wishes in your search for a job that offers you challenges and rewards.

Thanks,
[[Job Contact First Name]] [[Job Contact Last Name]]

No Longer Under Consideration – Alumni

This email template is sent to applicants who list Lehigh University among their educational background but who were not interviewed for the position. This email directs alumni applicants to the Alumni Career Services program.

[[Current Date Full]]

[[Applicant First Name]] [[Applicant Last Name]]
[[Applicant Street 1]] [[Applicant Street 2]]
[[Applicant City]] [[Applicant State]] [[Applicant Postal Code]]

Subject: [[Job Title]]

Dear [[Applicant First Name]],

Thank you for your interest in employment at Lehigh University. We are always honored when an alumnus or an alumna expresses interest in working at the university. Unfortunately, after a difficult selection process with a highly competitive pool, your application was not selected by the search committee to move forward within the employment process.

As your alma mater, Lehigh is pleased to offer you the Alumni Career Solutions program. Alumni Career Solutions provides resources, advice, and access to the alumni network of over 26,000 Lehigh graduates. I hope you will consider taking advantage of this valuable alumni benefit.

In the meantime, thank you again for your interest and best wishes in your search for a career that offers you opportunities to make the most of your Lehigh education.

Sincerely,

[[Job Hiring Manager First Name]] [[Job Hiring Manager Last Name]]
Hiring Manager

No Longer Under Consideration – Internal

This email template is sent to internal applicants (i.e., current Lehigh employees) who were not interviewed for the position.

Dear [[Applicant First Name]],

Thank you for your interest in furthering your career at Lehigh. While we value your background and experience, in this particular hiring search, we have decided to move forward with another candidate.

We hope you continue considering new opportunities at Lehigh by visiting the employment website at https://lehigh.hiretouch.com/. There, you'll find the online application forms as well as information about other vacant positions.

If you would like to enhance your future competitiveness as an applicant, Human Resources (HR) can help. The HR team offers assistance and programs in the following areas:

- ***CareerPower*** – an interactive program filled with self-discovery and practical, easy-to-use tools for professional development
- ***Career Values Self-Assessment*** – a tool to help you discover what parts of your career you value or find most satisfying
- ***Designing an Effective Resume*** – help with reviewing the fundamentals of a cover letter and resume
- ***Networking*** – help with forming contacts and maintaining relationships with people in a field of interest or profession you may want to pursue
- ***Real Time Coaching*** – the HR workplace learning team make time on the first and third Fridays of each month to focus on you and where you are in your work life, professional growth, career interests, and more.

You are also encouraged to contact **Linda Lefever** at extension 85195 or lip3@lehigh.edu if you would like to discuss your career with someone in HR.

Best wishes in your search for a career that offers you challenges and rewards.

Thanks,
[[Job Contact First Name]] [[Job Contact Last Name]]

Note: Temporary workers and wage employees are not considered internal applicants and should be sent the standard "No Longer Under Consideration" or "No Longer Under Consideration – Interviewed," as applicable.

No Longer Under Consideration – Interviewed

This email template is sent to all qualified candidates who were interviewed (including preliminary phone interviews), regardless of any apparent Lehigh affiliation. The content of this email template is editable and may be customized, if desired.

> [[Applicant First Name]] [[Applicant Last Name]]
>
> Thank you for the time you spent with us at Lehigh University. We enjoyed learning more about you and giving you the opportunity to learn more about Lehigh University.
>
> While your background and experiences are noteworthy, we have decided to move ahead with another candidate whose qualifications more closely fit our needs. Please continue to review our website at https://lehigh.hiretouch.com/ for information on other vacant positions at Lehigh.
>
> We appreciate your interest in Lehigh University. Best wishes in your search for a career which offers you challenges and rewards.
>
> Sincerely,
>
> [[HR Contact First Name]] [[HR Contact Last Name]]
> Human Resources Associate