HireTouch Applicant Tracking System

User's Guide for Search Committees

LEHIGH UNIVERSITY | HUMAN RESOURCES

HireTouch Applicant Tracking System
– User's Guide for Search Committees –

Table of Contents

Introduction

Lehigh's Human Resources (HR) Office manages and oversees the employment process for classified staff positions. HR staff work with employment coordinators throughout the university and provide support and guidance for hiring managers and search committees. This user's guide is designed to provide the information and resources needed to conduct searches for staff positions.

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. Other staff members may be asked to participate.

In decentralized searches, each hiring manager takes on the full responsibility of the search process from preliminary screening through reference checks. The HR staff primarily serve in a consultative role. Some departments prefer to utilize a designated search committee to work with the hiring manager to conduct specific searches. In these searches, committee members share in the responsibility for the screening and interviewing process steps.

In all cases, 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 a 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.

<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, including search committee members and admin support staff, 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]. To log out of the application, simply click Logout.

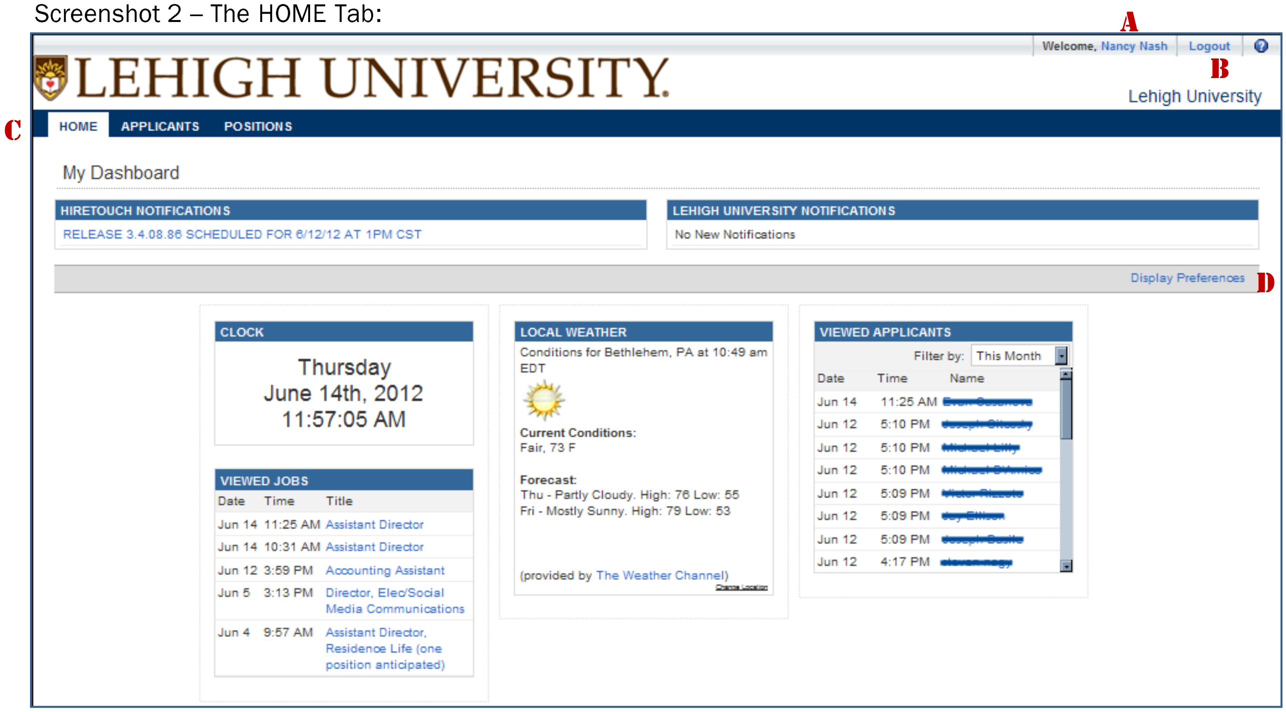
The applicant tracking system has an automatic time out after 20 minutes of inactivity. When this happens, you will need to log back in to re-access the system. All unsaved information will be lost.

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.

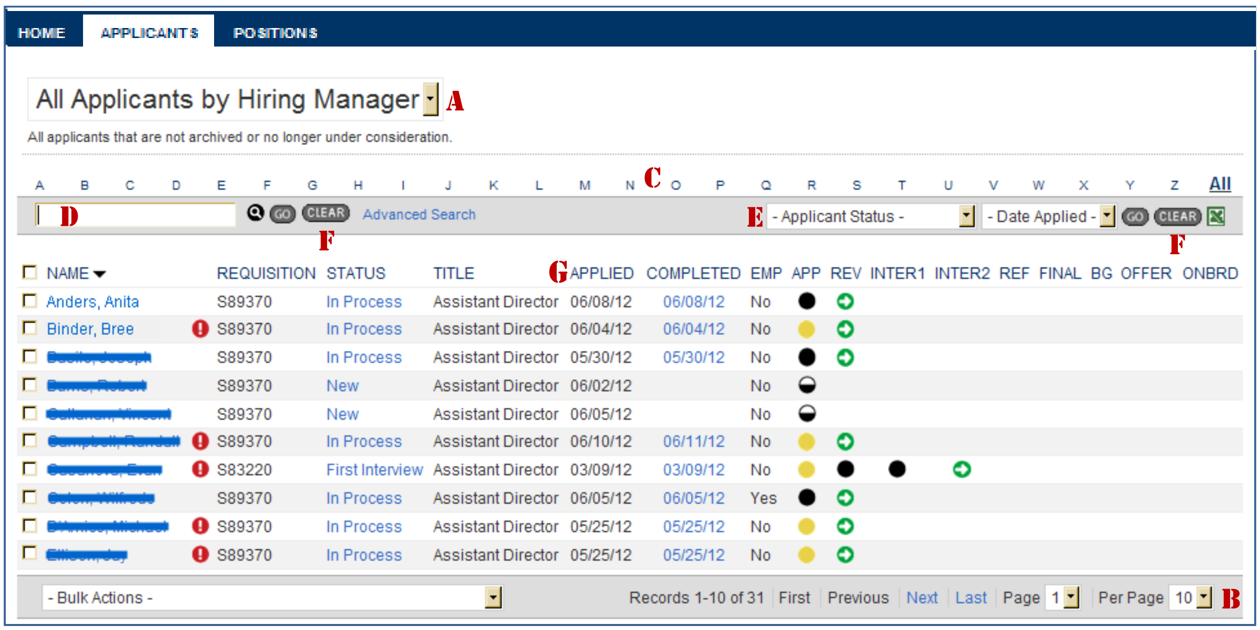
Toolbar Tabs:

- **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 your posted positions within the ATS (i.e., it's not position-specific). This tab can help you track applicants and any activity regarding a particular applicant. The majority of information about individual applicants is accessible in the APPLICANTS tab.

Screenshot 3 – APPLICANTS Tab Filters and Search Features:



Navigation Key:

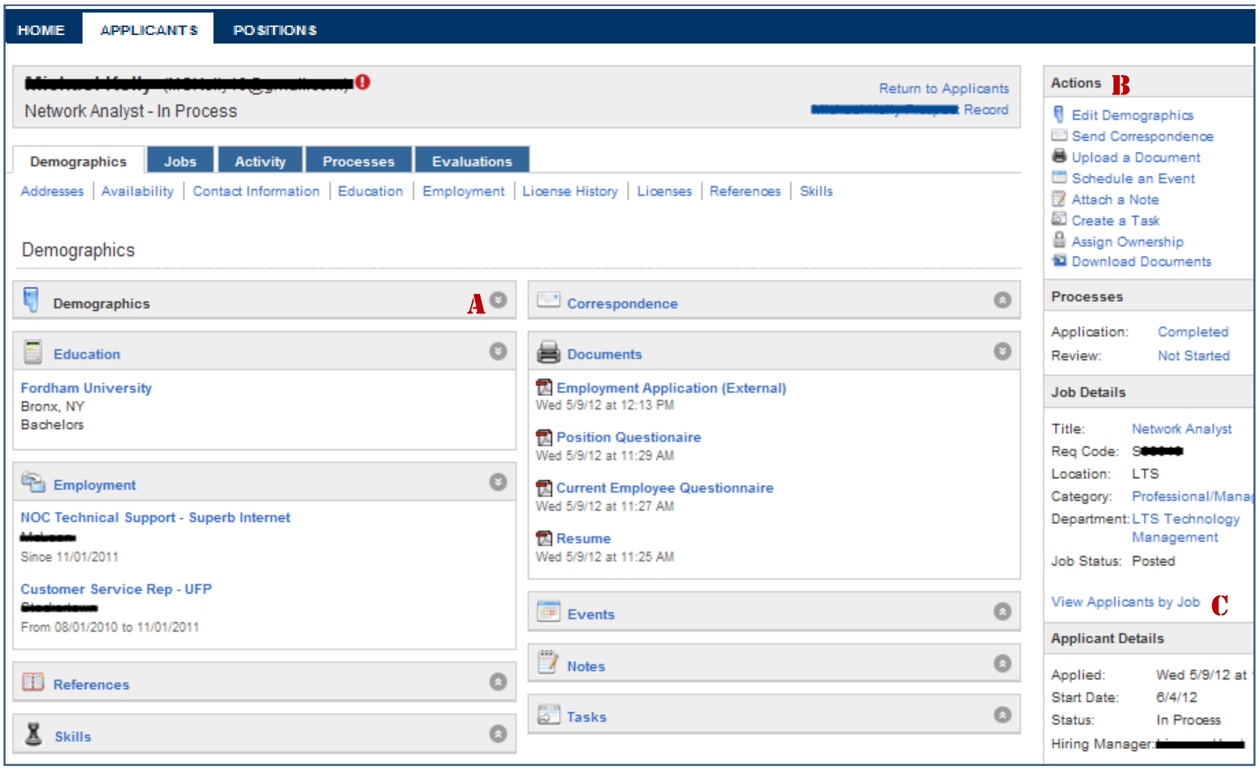
A	Default view; can be changed to Bulk Screening	**E**	Other filters available to narrow focus, based on status
B	Expand the number of names listed per page	**F**	Click CLEAR to remove applied filters
C	Find applicants by first letter of last name	**G**	Click any column heading to sort
D	Search by last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

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

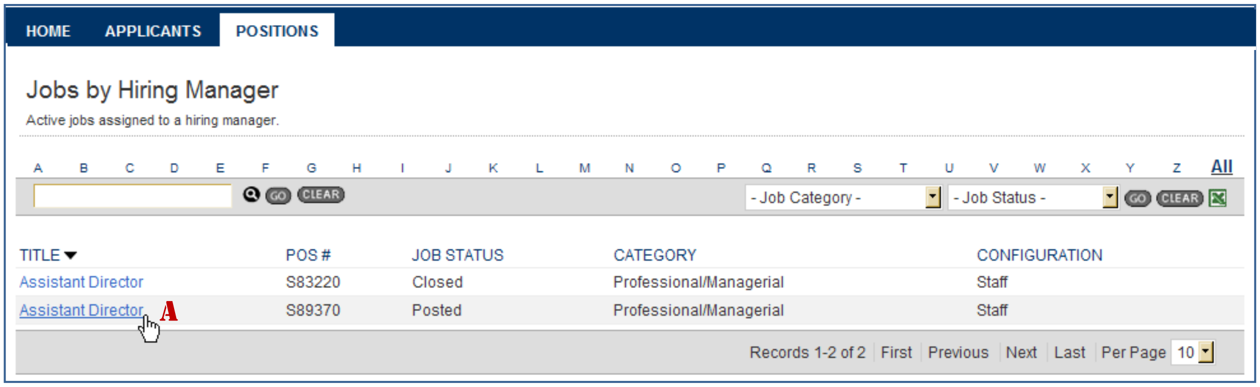
The Demographics page displays all information about this applicant, including information from his or her application, updates on progress through the workflow, activities for this applicant (e.g., interviews, references, etc.), and notes and tasks created in reference to this applicant. Any activity 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 your search committee. 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.

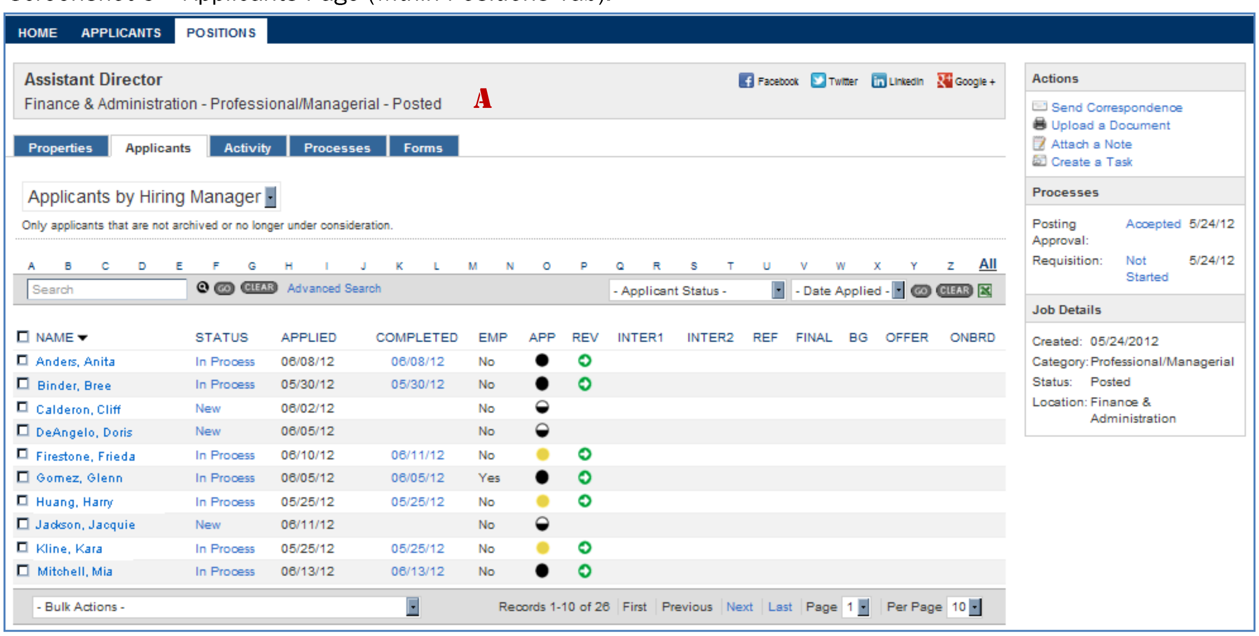
Screenshot 5 – POSITIONS Tab:



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, **B**, 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 admin 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. Some details, including names and contact information is 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

Evaluator:

Admin Support Access: [redacted]

Committee Members: Alex Anderson, [redacted]

Initial Screening of Applicants

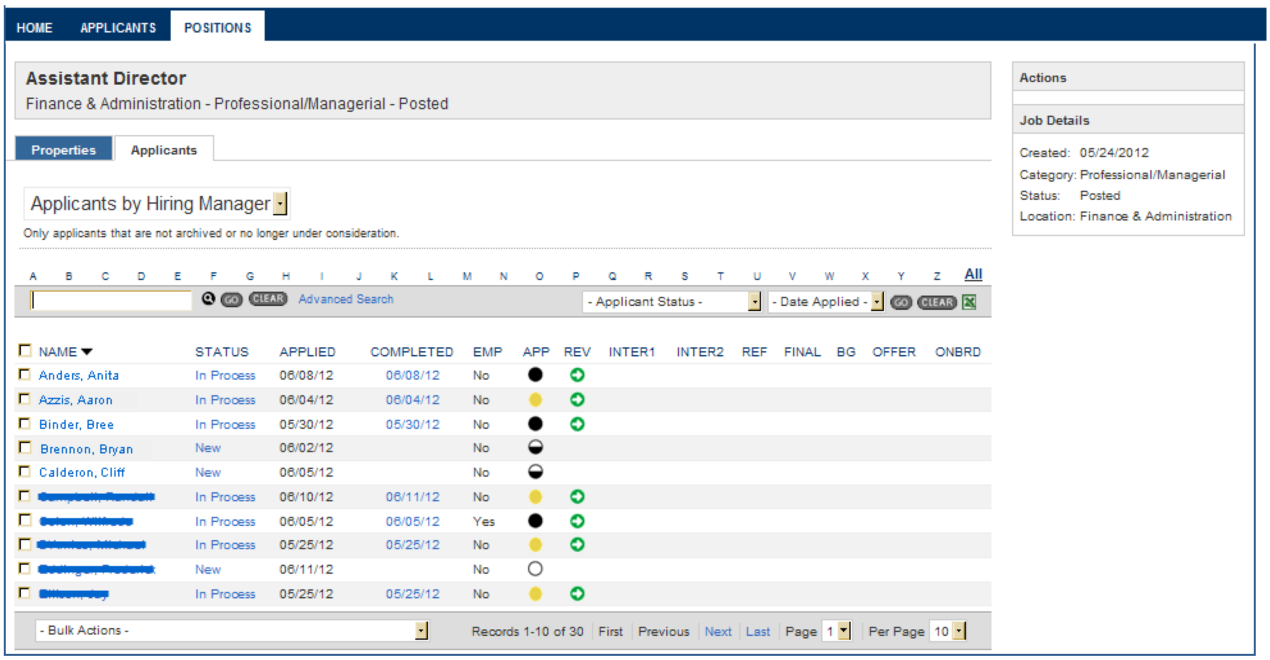
To start screening applicants for an open position, select the POSITIONS tab and then click on the position title. The Applicants page will appear by default [Screenshots 6 and 8]. When beginning the search process, you'll see that the APP (application) column contains a circle for each applicant:

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

The yellow circle means that 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:



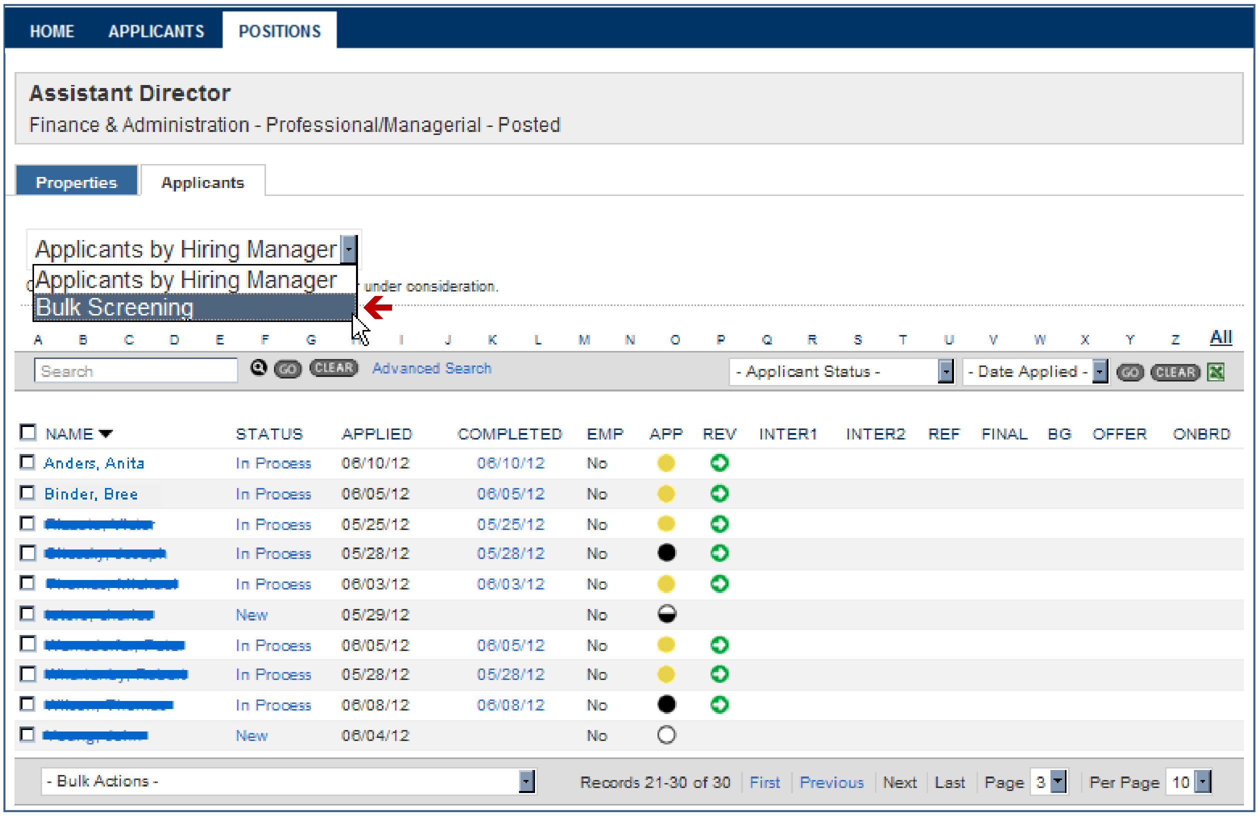
If the initial applicant pool is not too large, committee members may review the entire pool. If there are a lot of applicants, the hiring manager may decide to review the applications first to qualify a smaller pool of applicants for committee members to review and select the best candidates to move 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.

At the start of each search utilizing a committee, the hiring manager and committee members should meet to discuss and clearly define specific roles and responsibilities.

Bulk Screening Option

On the Applicants page within the POSITIONS tab, there is a choice of screening applicants individually or using the bulk screening option [🡐 in Screenshot 9]. 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 9 – Selecting the Bulk Screening Option:

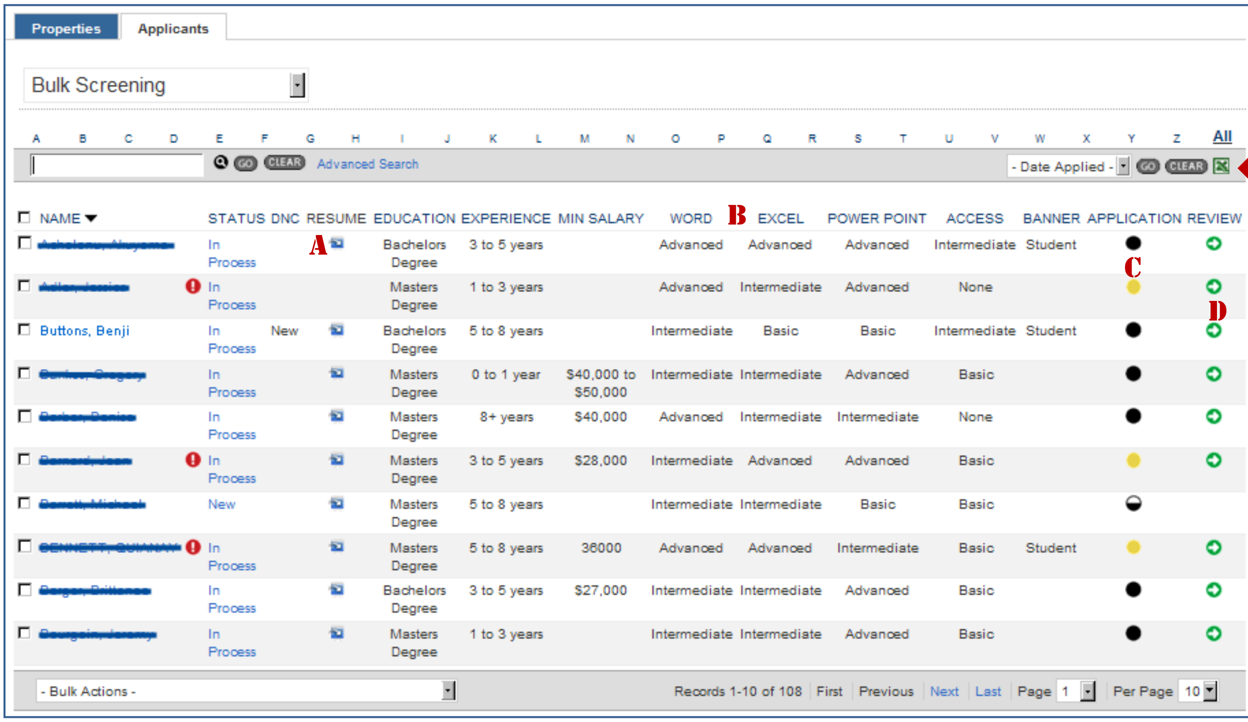


The bulk screening option pulls self-reported information from the *Position Questionnaire* that all applicants are asked to fill out. The questionnaire asks the following questions:

- 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 10] illustrates the bulk screening view. The applicant name and status columns remain visible but the other columns have changed.

Screenshot 10 – Bulk Screening View:



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

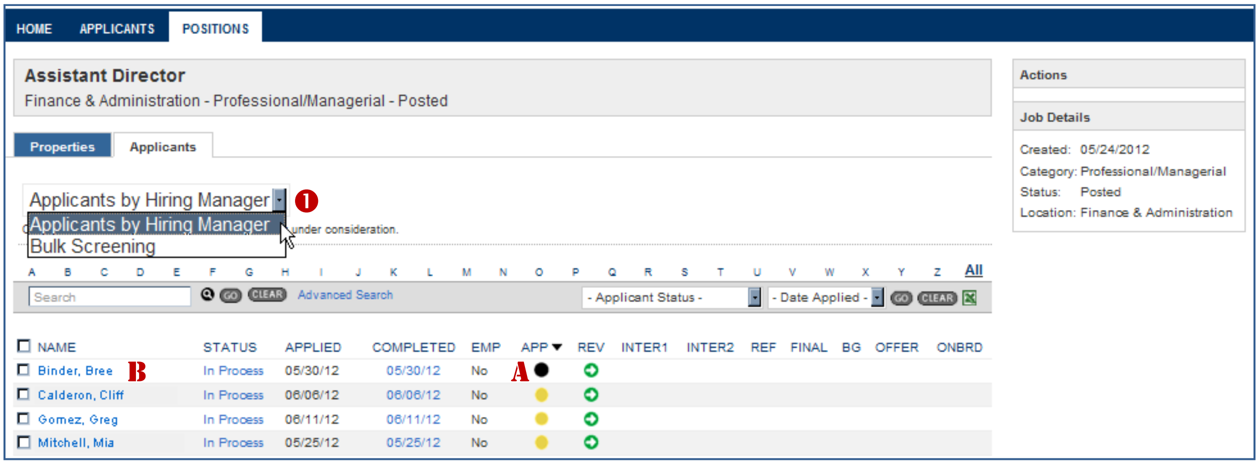
The information in most of the ATS screen views can be exported to an excel spreadsheet [🡐]. This export function is especially useful for the bulk screening information. Once exported to a spreadsheet, new columns can be inserted to add more information for screening comparisons or to add steps to track 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 after incomplete and unqualified applicants have been screened out 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, committee members need 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.

Individual Screening

Once the preliminary screening has been done, switch back to the Applicants by Hiring Manager screen within the POSITIONS tab of the ATS [Screenshot 11, ❶].

Screenshot 11 – Changing Screen Views:



Navigation Key:

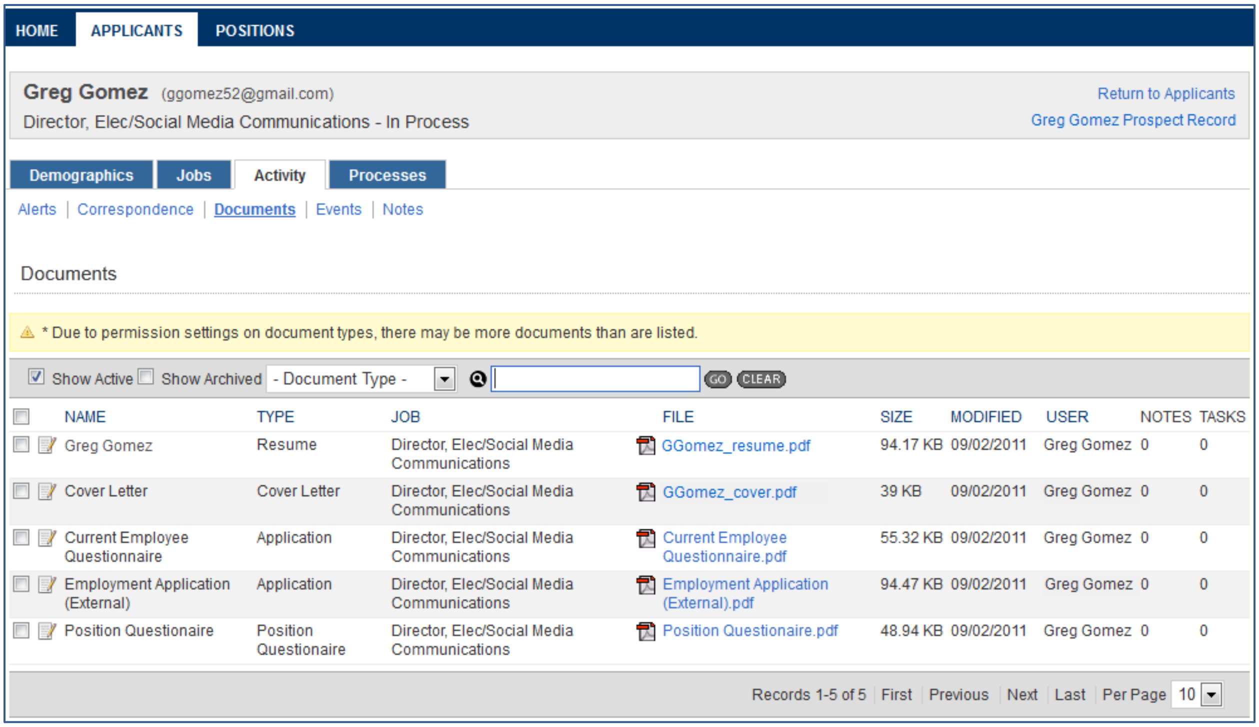
A Click on the circle in the APP column to quickly find all documents available for that applicant

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

The navigation key above shows you how to locate application documents for individual applicants. For most applicants, you will find the following documents [Screenshot 12, next page]:

- **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
- **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
- **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.

Screenshot 12 – Documents List in Applicants Tab:


HOME | APPLICANTS | POSITIONS

Greg Gomez (ggomez52@gmail.com)
Director, Elec/Social Media Communications - In Process

Return to Applicants
Greg Gomez Prospect Record

Demographics | Jobs | Activity | Processes

Alerts | Correspondence | Documents | Events | Notes

Documents

⚠ * Due to permission settings on document types, there may be more documents than are listed.

Show Active | Show Archived | - Document Type - | GO | CLEAR

NAME	TYPE	JOB	FILE	SIZE	MODIFIED	USER	NOTES	TASKS
Greg Gomez	Resume	Director, Elec/Social Media Communications	GGomez_resume.pdf	94.17 KB	09/02/2011	Greg Gomez	0	0
Cover Letter	Cover Letter	Director, Elec/Social Media Communications	GGomez_cover.pdf	39 KB	09/02/2011	Greg Gomez	0	0
Current Employee Questionnaire	Application	Director, Elec/Social Media Communications	Current Employee Questionnaire.pdf	55.32 KB	09/02/2011	Greg Gomez	0	0
Employment Application (External)	Application	Director, Elec/Social Media Communications	Employment Application (External).pdf	94.47 KB	09/02/2011	Greg Gomez	0	0
Position Questionaire	Position Questionaire	Director, Elec/Social Media Communications	Position Questionaire.pdf	48.94 KB	09/02/2011	Greg Gomez	0	0

Records 1-5 of 5 | First | Previous | Next | Last | Per Page 10

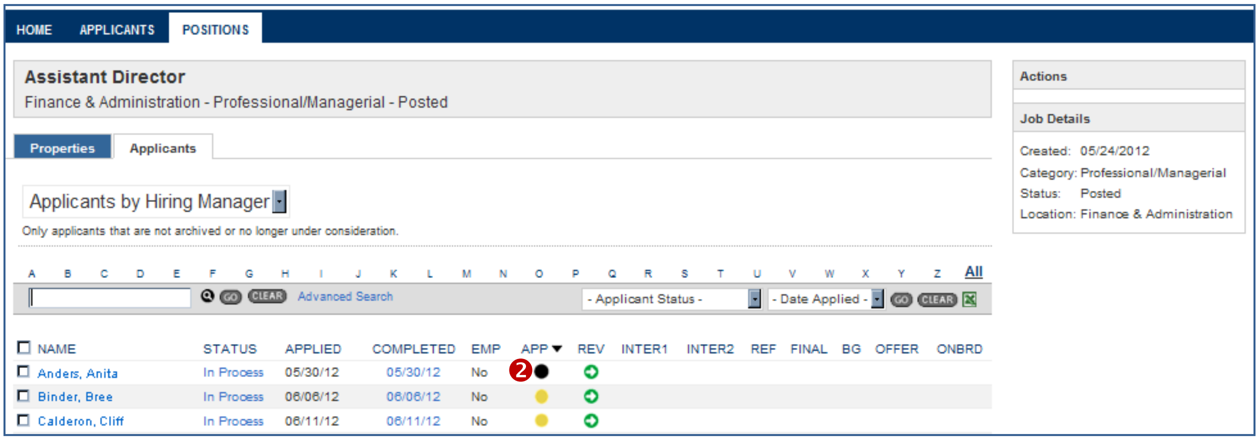
Other documents (e.g., writing samples, certifications, clearances, etc.) may be attached by the applicant, as desired, or as directed by the position posting. When reviewing documents, you may occasionally see duplicate or alternate versions of documents… once uploaded, neither the applicant nor the 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 your desktop for easy access, if desired.

Task 1: Read Applicants' Documents

Carefully review each applicant's documents to identify the candidates most qualified to move forward.

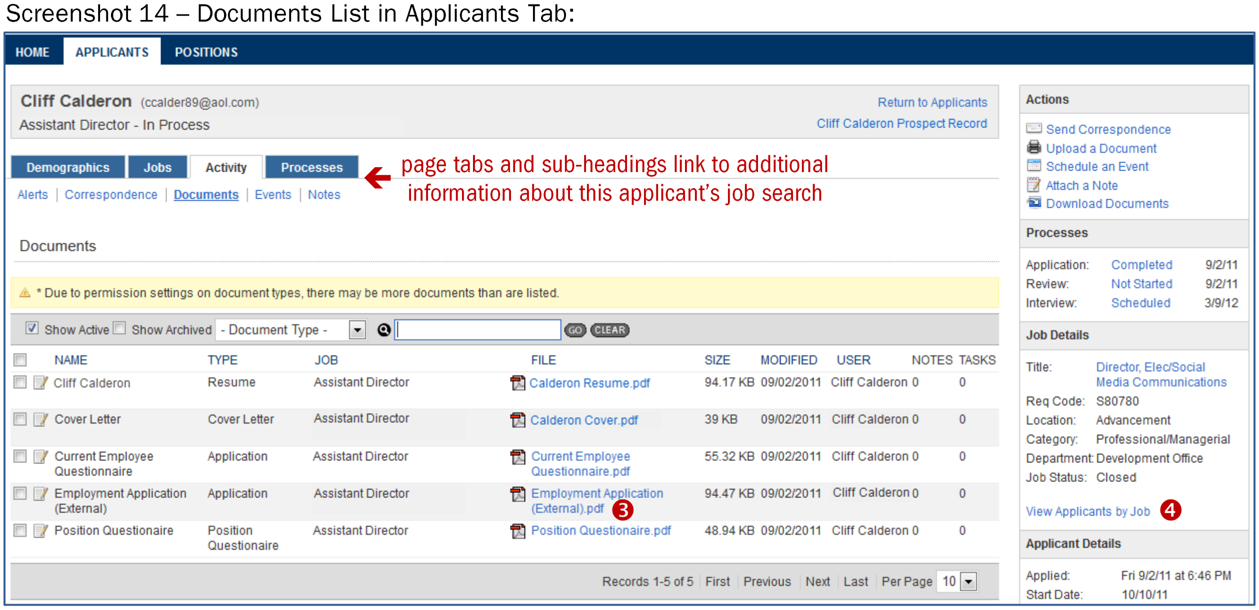
➢ For each applicant, click the circle in the APP column [Screenshot 13, ❷] to bring up the documents list [Screenshot 14].

Screenshot 13 – Applicants by Hiring Manager screen:



➢ Open each desired document by simply clicking the specific document file [❸, below].

Screenshot 14 – Documents List in Applicants Tab:



Some documents will be pdf files that are easily viewed within the ATS. For other types of documents you will be asked if you want to open or save the file. Select open.

➢ Review the cover letter, resume, and/or application to make a "qualified" vs. "not qualified" judgment.

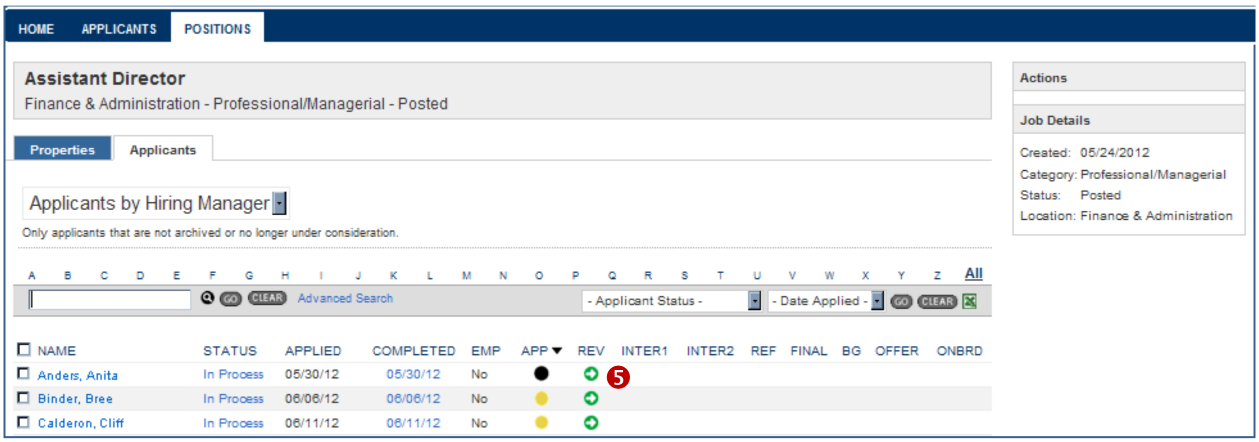
When working individually as part of a search committee, it is recommended that you keep a few simple notes regarding each candidate to refer to later when meeting with the rest of the committee. This is an ideal use of an excel spreadsheet created from the bulk screening view.

Recording a simple numerical rating of how well each applicant's qualifications match the position/department's requirements can also be very helpful later:

1 = qualified *2 = maybe qualified* *3 = not qualified.*

- Once you've assessed an applicant's qualifications, click the View Applicants by Job link [Screenshot 14,❹, previous page] to return to the main screen [Screenshot 15, below].

Screenshot 15 – Applicants by Hiring Manager screen:



After individually reviewing the applicant pool, search committee members typically meet to compare notes and ratings (if used) and collectively agree how well each applicant qualifies for continuing 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 basic qualifications but the 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 hiring manager or a designated admin support person will document the results of the search committee's findings. Within the ATS, the "qualified" candidates are moved forward to the INTER1 step; "maybe qualified" candidates remain in the REV step; and "no longer under consideration" correspondence is sent to the "not qualified" applicants. The "not qualified" candidates will be removed from view within the Applicants by Hiring Manager screen.

Preliminary Phone and/or First Campus Interview(s)

The ATS has been configured to correlate with the most common Lehigh search practices. 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.

Within the ATS, all interviews are scheduled as events. The hiring manager or designated admin support will schedule the preliminary phone and/or first interview events and send correspondence to the candidate and search committee members. Search committee members can track progress of these actions within the ATS:

- Log into the ATS and click on the POSITIONS tab and then the Applicants page to view the Applicants by Hiring Manager screen
- 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 or the designated admin support person will need to set up and arrange interviews by contacting the candidate to confirm a date and time. Search committee members involved in the interviews will need to update their personal calendars accordingly.

Scheduling the First Interview event triggers two automatic emails from the ATS to the hiring manager. The first contains information about conducting interviews with an attachment of sample questions based on university success factors. The second is a reminder to document interviews by attaching notes. This information should be shared with the search committee members.

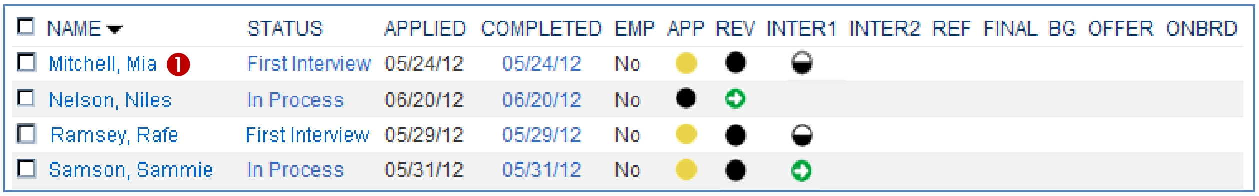
Correspondence

All email correspondence with candidates should be sent by either the hiring manager or designated admin support. This is accomplished though the ATS by using the Send Correspondence link from each candidate's 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. Correspondence sent through the ATS will appear to come from the hiring manager, regardless of who actually performs this task.

Task 2: Add a Note (Phone and First Interview)

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. When search committee members 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. If committee members are asked to add their own individual notes, they should do so within the ATS. Here's how this is done:

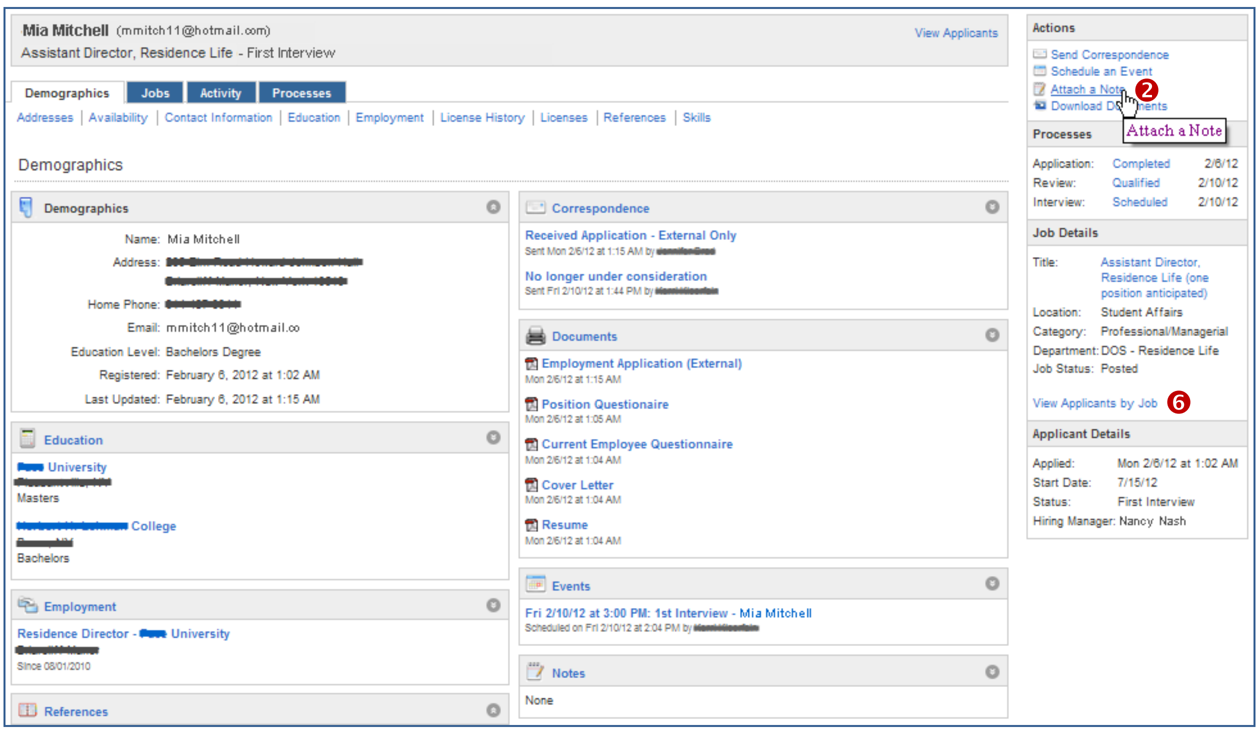
Screenshot 16 – Applicants by Hiring Manager screen:



NAME	STATUS	APPLIED	COMPLETED	EMP	APP	REV	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
Mitchell, Mia ❶	First Interview	05/24/12	05/24/12	No									
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									

➢ In the Applicants by Hiring Manager screen [Screenshot 16; ❶], click on the name of the interviewed candidate; the candidate's Demographics page opens [Screenshot 17].

Screenshot 17 – Demographics page:

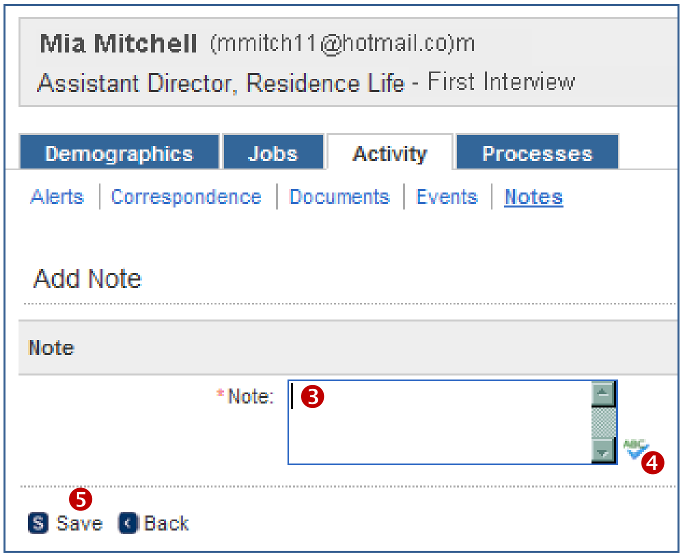


➢ In the Actions box, click on the Attach a Note link [❷].

The Actions box appears on the Applicants by Hiring Manager screen as well as 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.

➢ A small Add A Note window will open [Screenshot 18].

Screenshot 18 – Actions/Add A Note Window:



➢ Type a short note in the space provided [❸]

➢ Use the spell check feature [❹] to catch spelling errors

➢ Click on Save [❺] to record your note; the window will close

Carefully review spelling and note content 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 17, ❻, previous page] to return to the Applicants by Hiring Manager screen.

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

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."

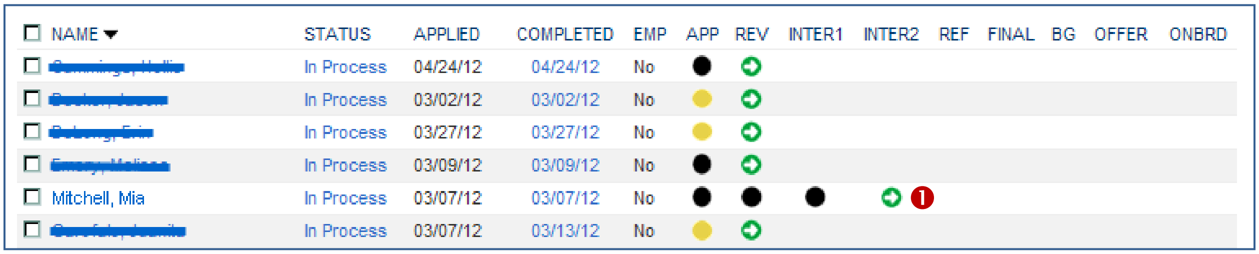
Interview Event “Completion” (First Interview)

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 done by the hiring supervisor or a designated admin support person.

There is no corresponding completion task for a preliminary phone interview. Once a note is added to the candidate’s ATS record to document the phone interview result, the event is considered complete.

For candidates who **qualify to move forward** to the next step in the process, the hiring manager or designate will complete the First Interview step. Once completed, the ◒ icon changes to ● in the INTER1 column of the Applicants by Hiring Manager screen and the action ➲ icon moves to the INTER2 column for this candidate button [Screenshots 19; ❶].

Screenshot 19 – Applicants by Hiring Manager screen:



NAME	STATUS	APPLIED	COMPLETED	EMP	APP	REV	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
[redacted]	In Process	04/24/12	04/24/12	No									
[redacted]	In Process	03/02/12	03/02/12	No									
[redacted]	In Process	03/27/12	03/27/12	No									
[redacted]	In Process	03/09/12	03/09/12	No									
Mitchell, Mia	In Process	03/07/12	03/07/12	No				❶					
[redacted]	In Process	03/07/12	03/13/12	No									

The First Interview step must be completed in order to schedule a candidate’s Second Interview event in the system.

For candidates who **will definitely NOT be moving forward** to the next step, the hiring manager or designated admin support will send a “No longer under consideration” correspondence to the candidate.

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 recommendations from the search committee. The hiring manager or designated admin support person will need to set up and arrange the next round of on-campus interviews in the usual manner, including contacting the candidates to confirm a date and time.

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

The ATS actions required for the Second Interview event are essentially the same as the actions required for the First Interview event. For each candidate interviewed, the Second Interview event must be:

- Scheduled [by the hiring manager or designated admin support]

  In the Applicants by Hiring Manager screen, the ➲ changes to a ◒ in the INTER2 column; this indicates that the interview has been scheduled but not yet completed.

- Correspondence [sent by the hiring manager or designated admin support]
- Documented [notes may be added by the hiring manager, designated admin support, or by search committee member(s)]; see Task 5, next page
- Completed [by the hiring manager or designated admin support].

  The ◒ changes to a ● in the INTER2 column; this indicates that the interview has been scheduled but not yet completed.

Task 3: Add a Note (Second Interview)

During the interview process, interviewers may keep written notes in any manner desired. However, the interview results must also be formally 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 person, or committee member) can collect feedback from each search committee member. 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.

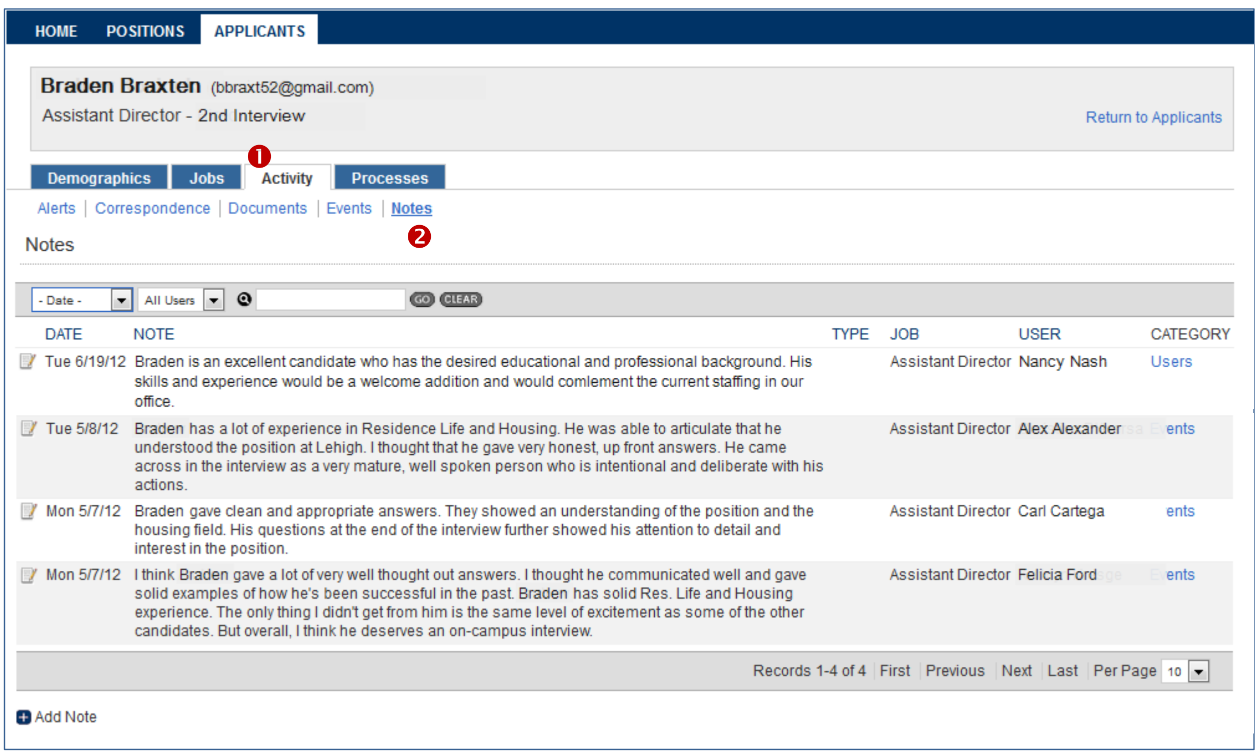
- Refer back to Task 4: Add a Note (pages 21-22) for directions on adding a note.

Due to their discoverable nature, notes entered into the applicant tracking system 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." Search committee members 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 20]:

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

Screenshot 20 – Activity/Notes Page:



Interview Event “Completion” (Second Interview)

After each Second Interview is conducted and the result(s) entered as notes, the Second Interview must be completed within the ATS. This is done by the hiring manager or designated admin support.

Candidates who are qualified as possible finalists will have their status updated to “Complete/Check References” and their green arrow will move to the REF column in the Applicants by Hiring Manager screen. Candidates who are not moving on in the process after the second interview will be sent a “no longer under consideration” email by the hiring manager or designated admin support.

Voluntary Withdrawals

Included on the Applicants by Hiring Manager screen [Screenshot 21] 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 21 – Applicants by Hiring Manager Screen:

NAME	STATUS	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. When this happens, the hiring manager or a designated admin support person will need to add a note to the candidate's record and change the candidate's status to remove this person from further consideration.

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. Working with the hiring manager, the search committee will need to select the finalist(s). Reference checks 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. It is generally best practice to have one person conducting all of the reference checks.

A ➲ in the REF column indicates that the committee is ready to proceed with reference checks on this finalist. The hiring manager will receive an email from HR [Screenshot 22] that outlines the procedure to follow along with attached information and tips for conducting reference checks.

Screenshot 22 – 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.

*This automatic email from HR is triggered when the Second Interview event is completed in the ATS and the "*Complete/References*" option is selected in the event completion window for a particular candidate.*

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 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 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 – e.g., relocation, duration of appointment if soft money funding, sign on bonus, moving expenses, etc.

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

The search records within the ATS must be updated by the hiring manager or designated admin support before a verbal offer will be approved. Only the finalist(s) should remain visible on the Applicants by Hiring Manager screen.

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 designated admin support person to update the search records and send correspondence to non-finalists. The ATS includes alternate versions of a "no longer under consideration" email template. Standard message content for these email templates is provided in the addendum that appears at the end of this guide. Each template can be edited and customized as desired by the hiring manager or designated admin support. By default, the hiring manager's name is included in the closing of each template so that all correspondence appears to come from the hiring manager.

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 Written Offer Letter

Notice that the green arrow in the previous screenshot [Screenshot 34] 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.

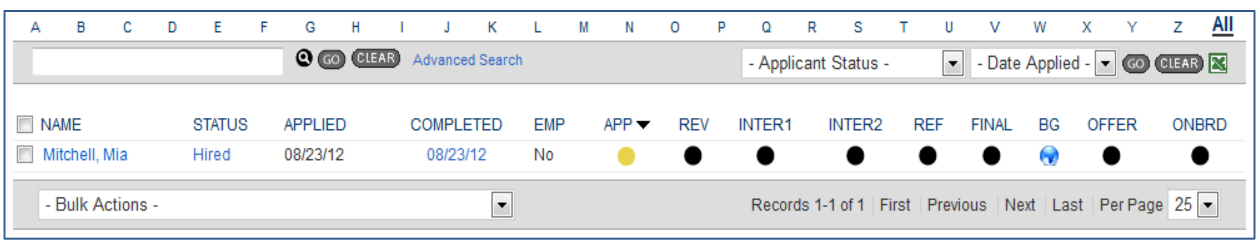
Once a signed copy of the offer letter is sent, HR then sends an email to the new hire with onboarding information. The hiring manager will also receive an email from HR containing information for onboarding the new hire.

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 23]. If not, the hiring manager or the designated Admin support person will be asked to finish updating the search.

Screenshot 23 – Applicants by Hiring Manager Screen/Search Complete



Closing Comments

At the conclusion of the search, committee members 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 committee member 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 manager, search committees, and other ATS users.

This User's Guide for Search Committees 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 admin support staff.

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.

[[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