HireTouch Applicant Tracking System

User's Guide for Hiring Managers

— for decentralized search processes —

LEHIGH UNIVERSITY | HUMAN RESOURCES

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– User's Guide for Hiring Managers for Decentralized Searches –

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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. This user's guide is designed to provide hiring managers with the information and resources needed to conduct decentralized search processes for classified staff positions, from recruitment through hire.

What do we mean by "decentralized?" 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 initial process steps (applications review and preliminary screening) are handled by HR working with the hiring manager. Once HR has reduced the applicant pool 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 finalists for second interviews with the hiring manager.

In decentralized searches, each hiring manager takes on the full responsibility of the selection process including applications review and preliminary screening. In these searches, the HR staff takes on more of a consultative role during the selection process.

In both 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 documents submitted by applicants
- Schedule interviews and attach notes
- Track applicants as they progress through the recruitment and selection process
- Initiate timely, customizable email communications with applicants, including "regrets" correspondence.

The applicant tracking system centralizes information accessibility and automates the hiring process which enables hiring managers, 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 Your Search

Prior to conducting your 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 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]. To log out of the application, simply click Logout.

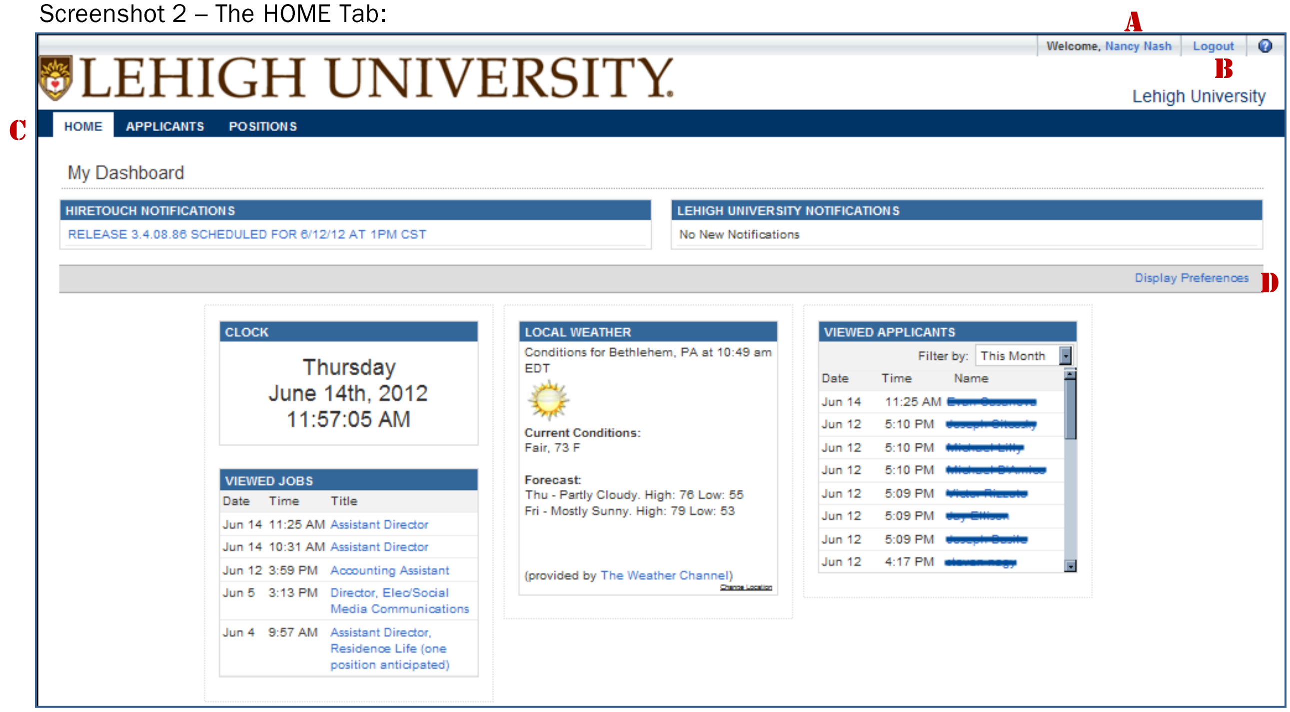
The applicant tracking system has an automatic time out after 20 minutes of inactivity. When this happens, you will need to log back in to re-access the system. All unsaved information will be lost.

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.

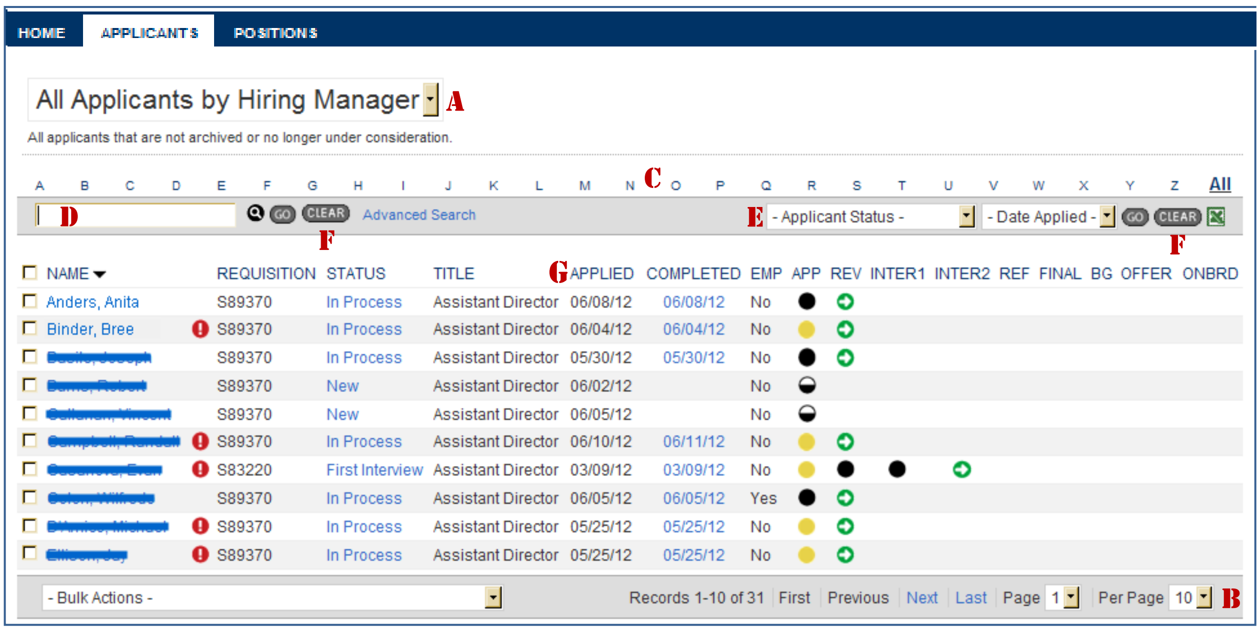
Toolbar Tabs:

- **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., this list is not position-specific). This tab can help you track applicants and activity taken regarding each applicant. The majority of information about individual applicants is accessible in the APPLICANTS tab.

Screenshot 3 – APPLICANTS Tab Filters and Search Features:



NAME	REQUISITION	STATUS	TITLE	APPLIED	COMPLETED	EMP	APP	REV	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
Anders, Anita	S89370	In Process	Assistant Director	06/08/12	06/08/12	No									
Binder, Bree	S89370	In Process	Assistant Director	06/04/12	06/04/12	No									
[redacted]	S89370	In Process	Assistant Director	05/30/12	05/30/12	No									
[redacted]	S89370	New	Assistant Director	06/02/12		No									
[redacted]	S89370	New	Assistant Director	06/05/12		No									
[redacted]	S89370	In Process	Assistant Director	06/10/12	06/11/12	No									
[redacted]	S83220	First Interview	Assistant Director	03/09/12	03/09/12	No									
[redacted]	S89370	In Process	Assistant Director	06/05/12	06/05/12	Yes									
[redacted]	S89370	In Process	Assistant Director	05/25/12	05/25/12	No									
[redacted]	S89370	In Process	Assistant Director	05/25/12	05/25/12	No									

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

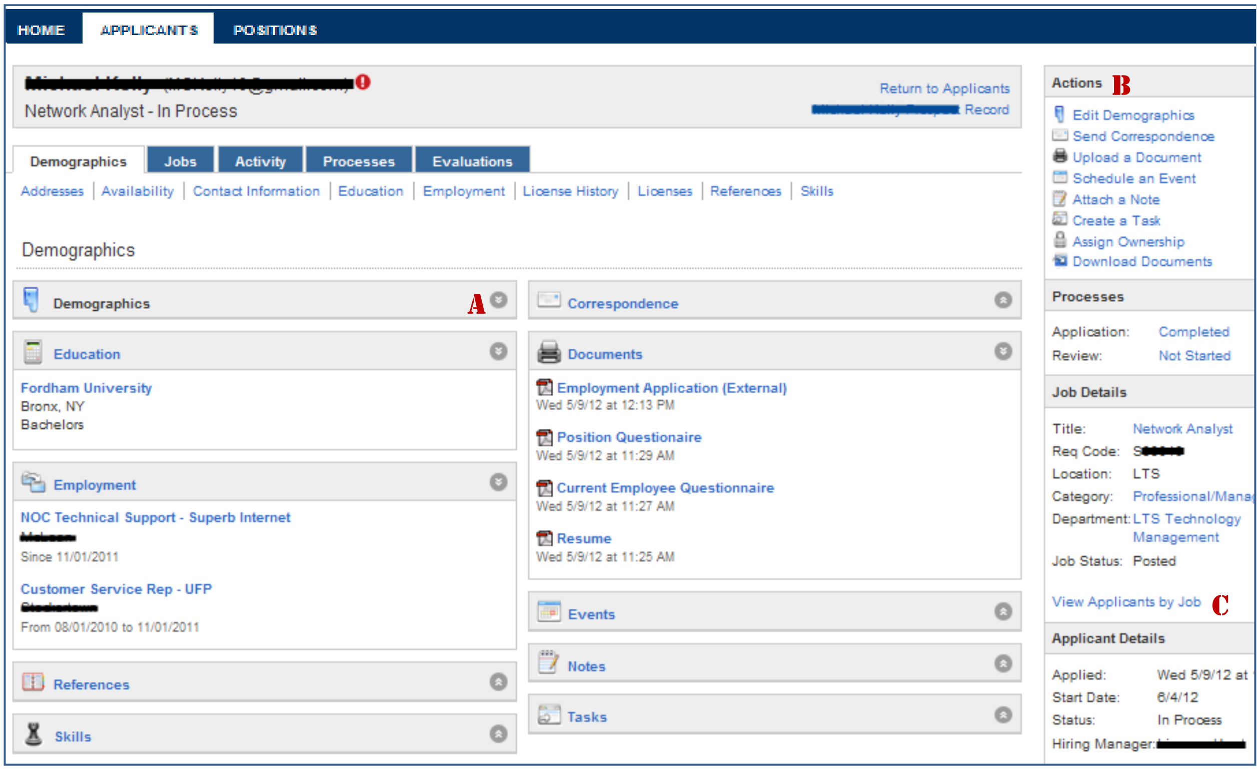
G Click any column heading to sort

The default view for hiring managers, admin support, and committee members is All Applicants by Hiring Manager [**A**]. The APPLICANTS tab shows 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 will help you move through the list of applicants (i.e., First, Previous, Next, Last, and Page).

The various sort/search options can help you 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

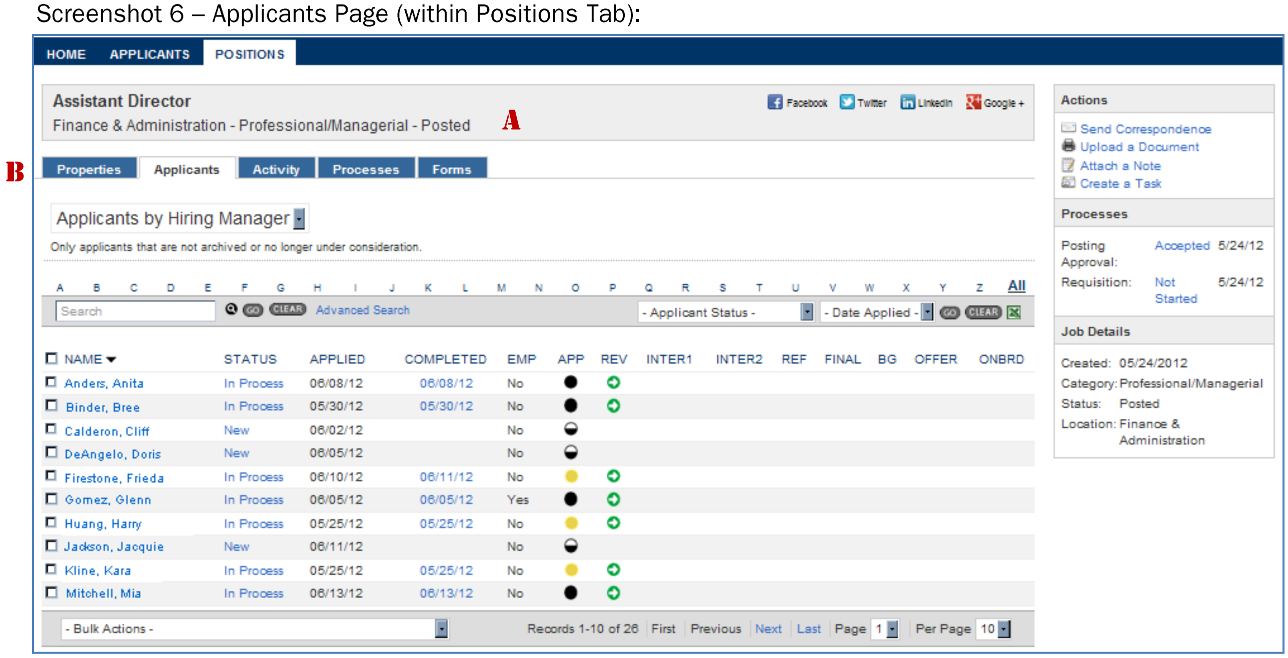
Selecting the POSITIONS tab brings up a list of your open searches. It lets you view information about your posted position(s). Additionally, like the APPLICANTS tab, the POSITIONS tab allows you to view and work with prospective applicants who have applied for your position(s) within the ATS.

Screenshot 5 – POSITIONS Tab:

Navigation Key:

A Select the position title for your search and the Applicants list 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. 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], [redacted]

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

Initial Screening of Applicants

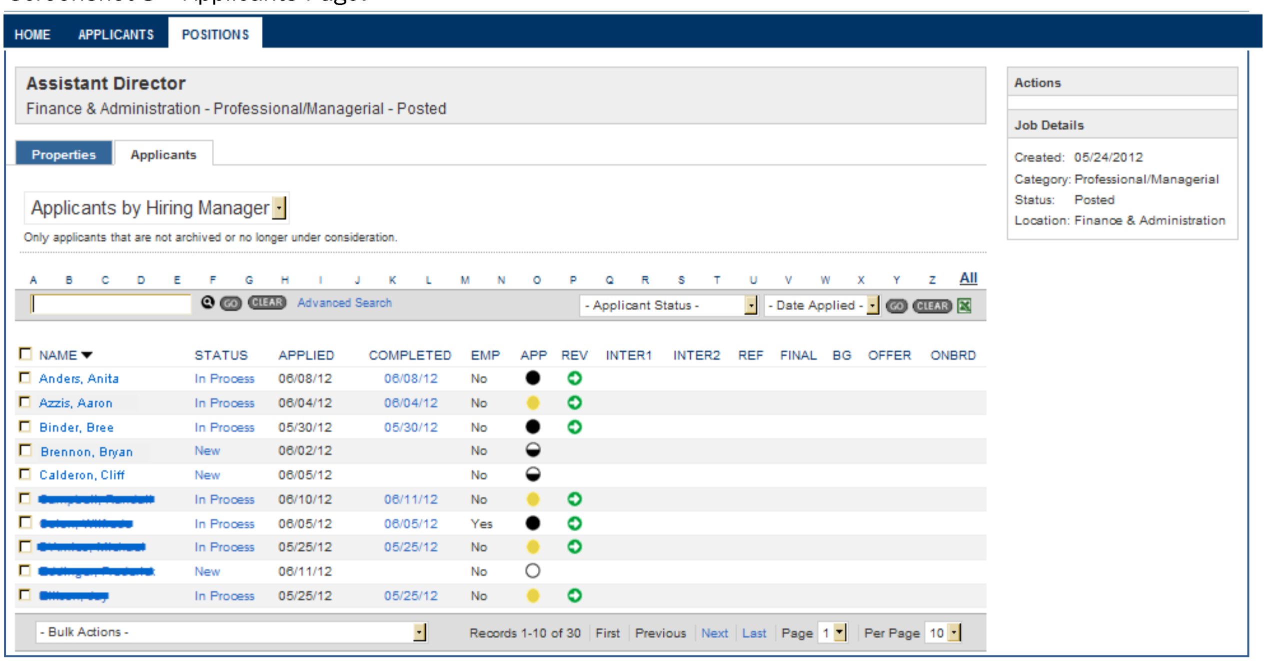
To start screening applicants for your open position, select the POSITIONS tab and then click on your position title. The Applicants page will appear by default [Screenshots 6 and 8]. When beginning the search process, you'll see that the APP (application) column contains a circle for each applicant:

- ○ 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 you complete each step in the process for a particular applicant.

Screenshot 8 – Applicants Page:

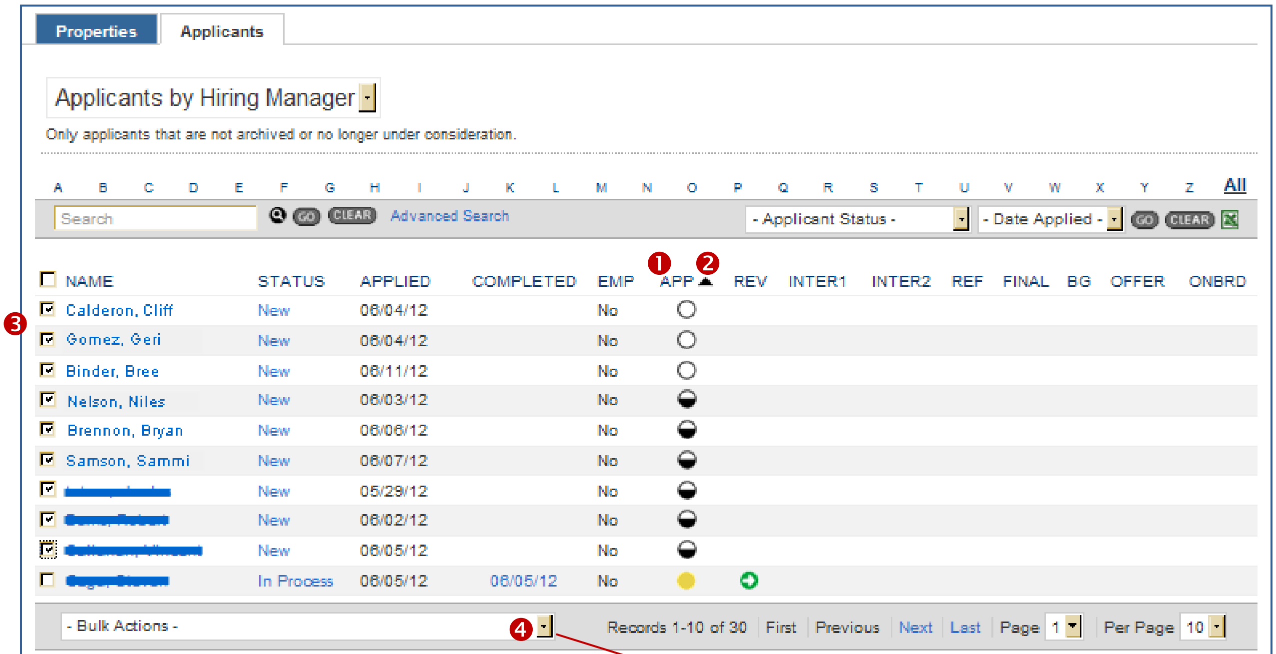


Task 1: Filter Out Incomplete Applications

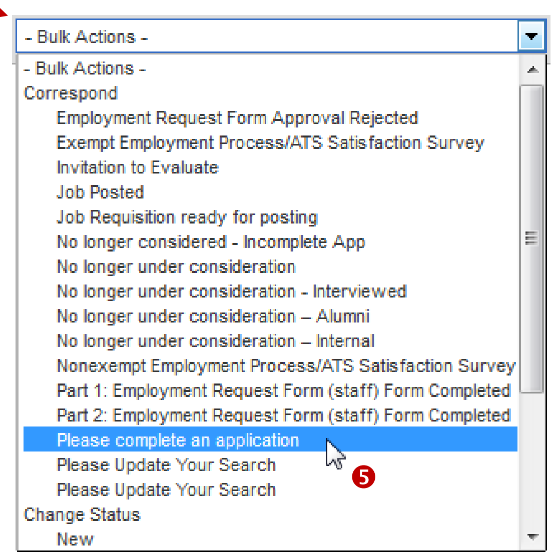
In every search, there are always some applicants who don't fully complete the application process. From within the applicant tracking system, you can send a friendly "please complete an application" email. Here's how:

- 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]

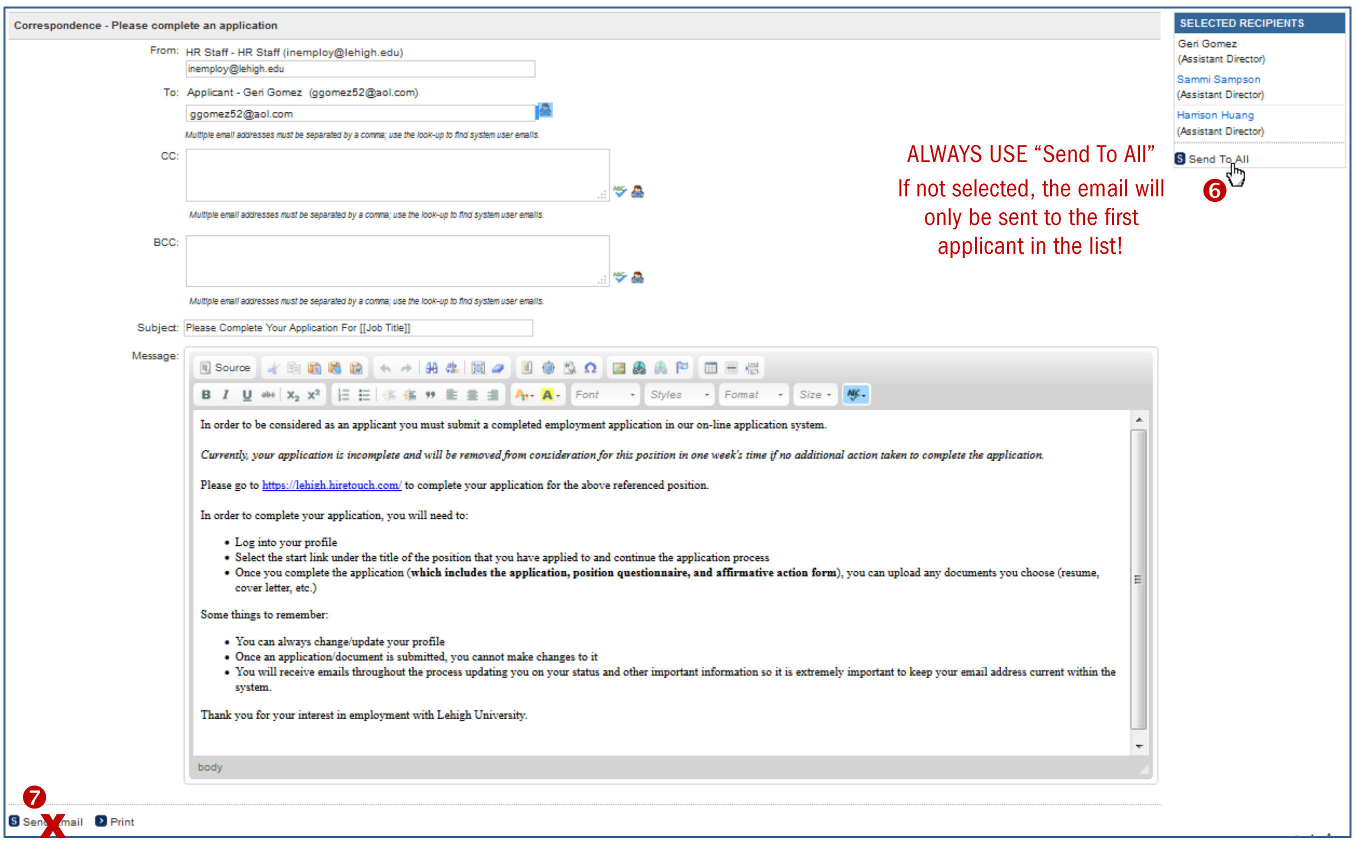


Screenshot 10 - Bulk Actions Menu:

Screenshot 11 – Action Confirmation Message:

- ➢ 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
- ➢ Your 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 12 – Selecting Incomplete Applicants:



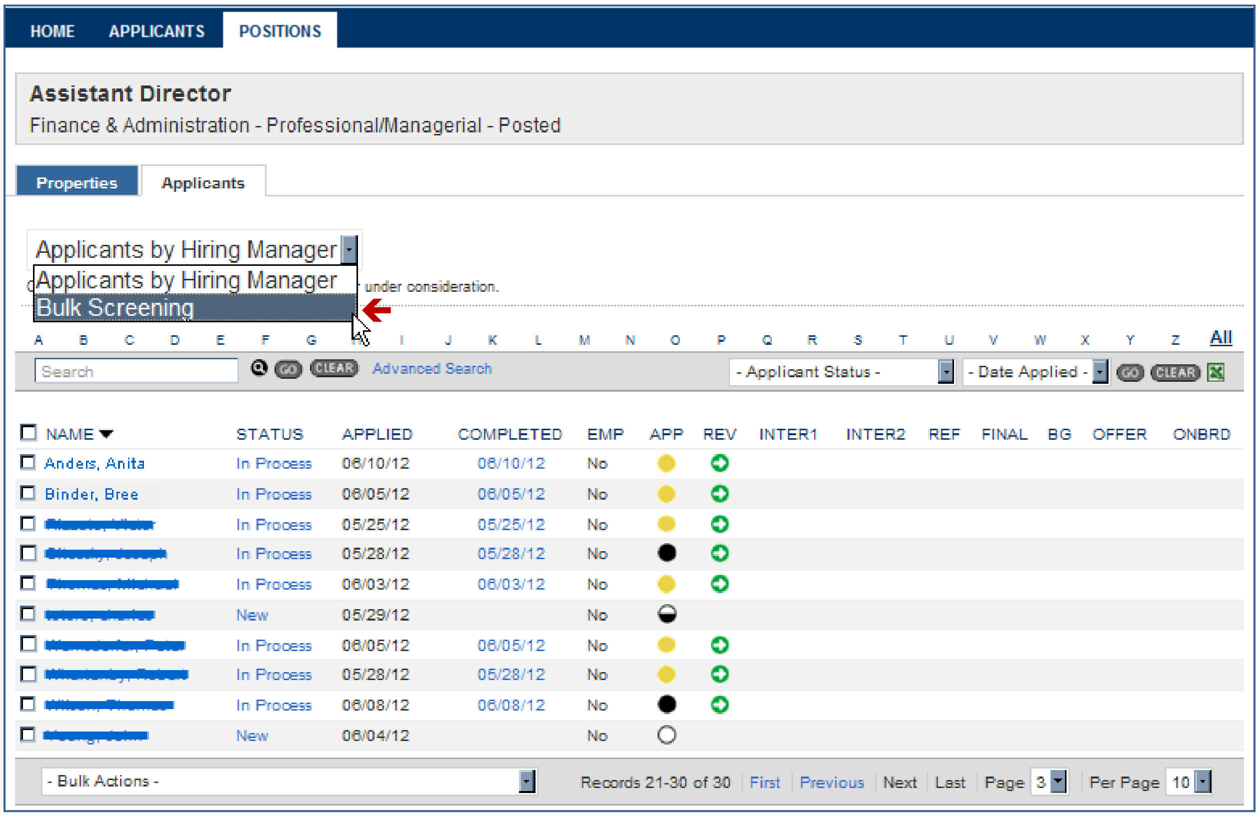
- ➢ Click on the “Send to All” option to send the email to multiple recipients [❻]
  Only use the “Send Email” button at bottom left [❼] if sending to JUST the first recipient
- ➢ Another “Send correspondence to selected applicant(s)?” message will appear to verify that this is the action you wish to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

Check back in about a week. Any applicant who is still showing as incomplete a week 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, hiring managers have a choice of screening applicants individually or using the bulk screening option [← in Screenshot 13]. Unless the posted position is highly specialized, most hiring managers will be faced with a large initial pool of applicants. In a decentralized search, it is the responsibility of the hiring manager 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:

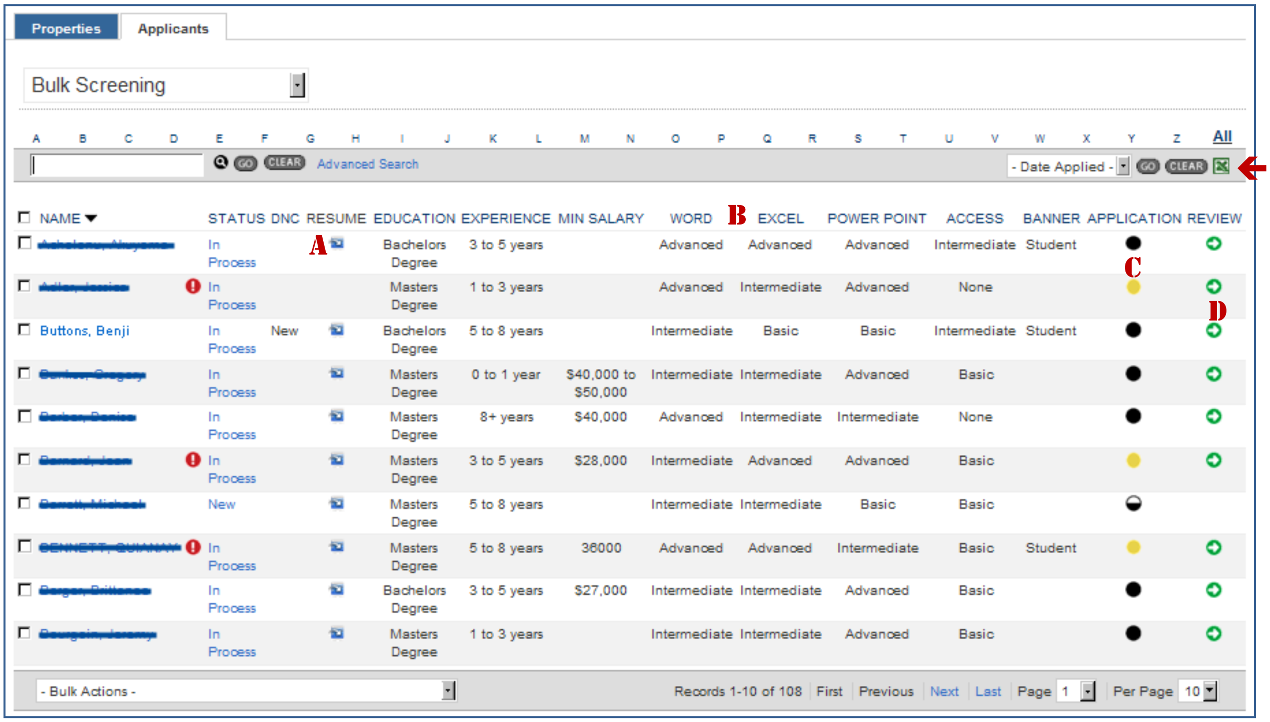


The bulk screening option pulls self-reported information from the *Position Questionnaire* that all applicants are asked to fill out. The questionnaire asks the following questions:

- 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.

This information displayed in the bulk screening view allows the hiring manager (as well as admin support and/or search committee members) 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, committee members may need to be reminded 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

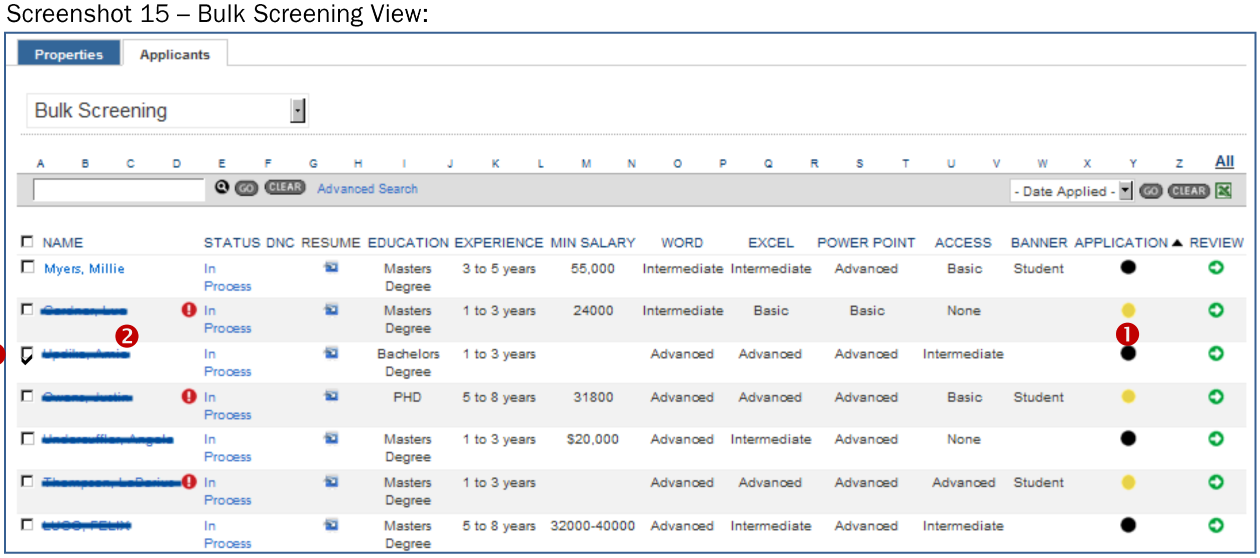
Use the bulk screening view to make your first pass through the applicants for your open position. You will be looking at the education, years of experience, minimum salary, and computer skills information listed in the bulk screening view to compare qualifications. Any applicants deemed “not qualified” for your position will need to be notified and removed from your view.

The ATS includes fiver 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
- 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 sent to “not qualified” applicants who were 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 will include 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 your view of the applicant pool.

Screenshot 15 – Bulk Screening View:



NAME	STATUS	DNC	RESUME	EDUCATION	EXPERIENCE	MIN SALARY	WORD	EXCEL	POWER POINT	ACCESS	BANNER	APPLICATION	REVIEW
Myers, Millie	In Process			Masters Degree	3 to 5 years	55,000	Intermediate	Intermediate	Advanced	Basic	Student		
[redacted]	In Process			Masters Degree	1 to 3 years	24000	Intermediate	Basic	Basic	None			
[redacted]	In Process			Bachelors Degree	1 to 3 years		Advanced	Advanced	Advanced	Intermediate			
[redacted]	In Process			PHD	5 to 8 years	31800	Advanced	Advanced	Advanced	Basic	Student		
[redacted]	In Process			Masters Degree	1 to 3 years	$20,000	Advanced	Intermediate	Advanced	None			
[redacted]	In Process			Masters Degree	1 to 3 years		Advanced	Advanced	Advanced	Advanced	Student		
[redacted]	In Process			Masters Degree	5 to 8 years	32000-40000	Advanced	Intermediate	Advanced	Intermediate			

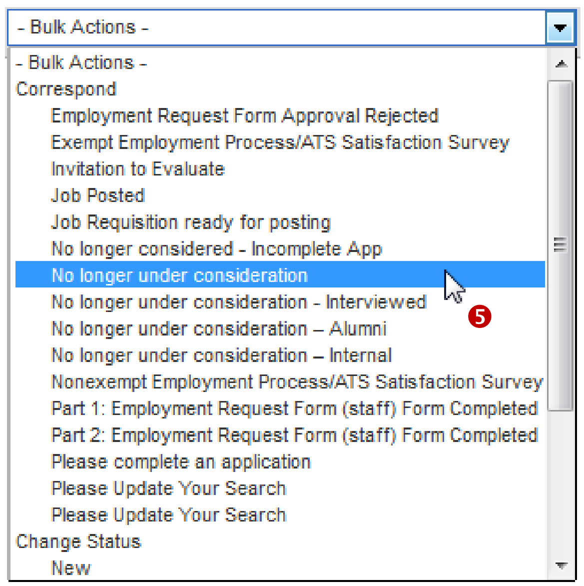
- ➢ Identify any applicants that you judge to be “not qualified” for your open position, based on comparisons of the qualifications listed
- ➢ Check applicant’s application and/or resume [❶] for any Lehigh affiliation as either an internal applicant or as an alumnus of Lehigh

You can also click on the applicant's name [❷] to bring up the Demographics *page where all information pertaining to that applicant is visible including links to associated documents.*

- Make note of any applicants with a Lehigh affiliation (i.e., alumnus or internal applicant) then close the resume or application window to return to the Bulk Screening view
- 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 your first group of applicants—not qualified/no Lehigh affiliation—by clicking the selection box to the left of each applicant's name [❸]
- 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, ❹]

Be sure to choose the appropriate template!

Screenshot 16 – Bulk Actions Menu:



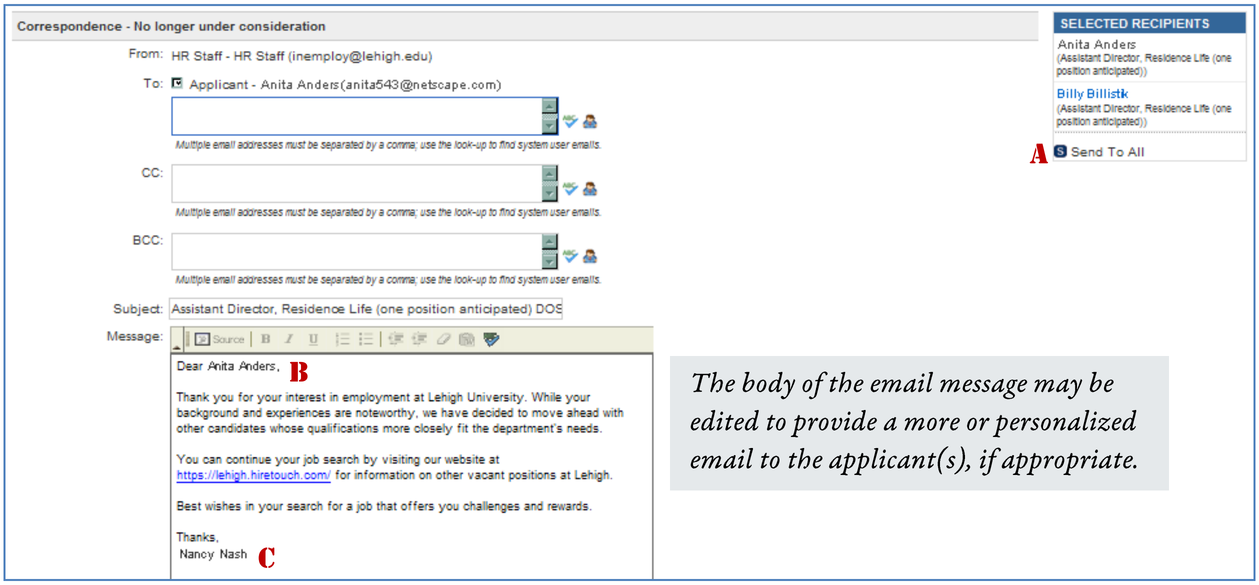
- A "Send correspondence to selected applicant(s)?" message will appear to verify that you wish to take this action
- Click OK to continue ❹

This will NOT automatically send the email.

- An e-mail template opens [Screenshot 17]
- Click the "Send To All" button [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 internal applicants deemed "not qualified" for this position, if any, but choose the "No longer under consideration – Internal" template.

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

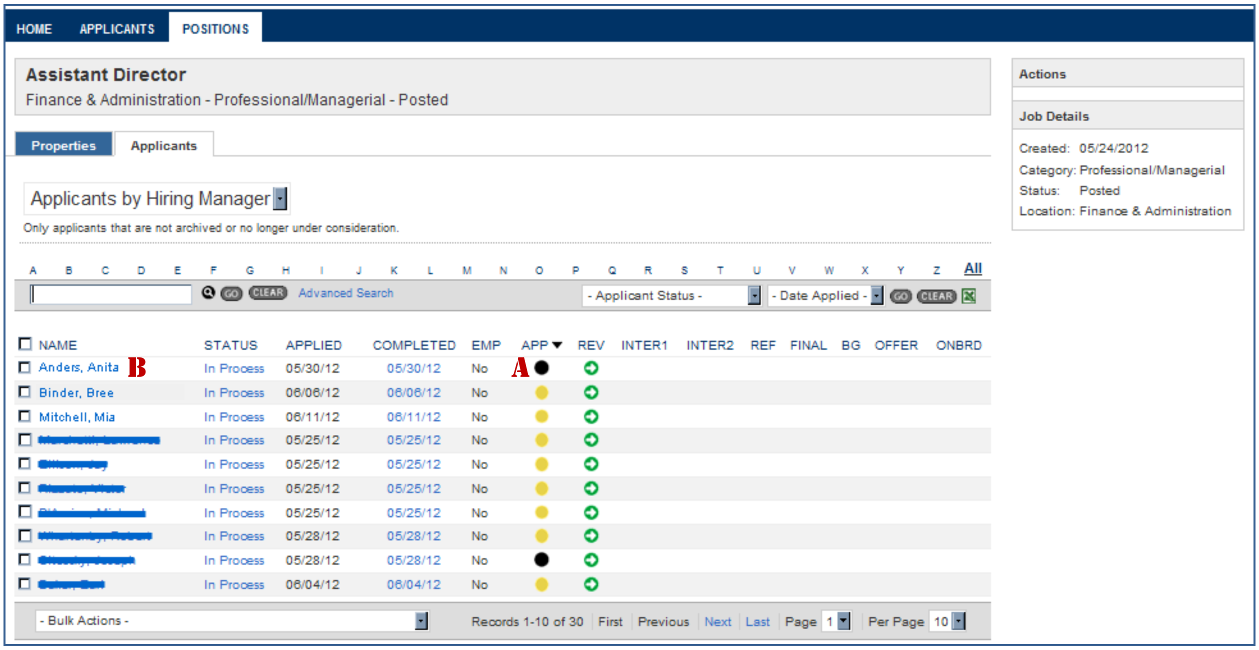
Each time you send a "no longer under consideration" email, the recipients are removed from your view of the applicant pool.

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

Individual Screening

Once you've completed the preliminary screening and removed any applicants identified as "not qualified," you should more carefully review the remaining applicants. This is done from the Applicants by Hiring Manager screen in the POSITIONS tab in the ATS.

Screenshot 18 – Positions Tab/Applicants by Hiring Manager:



Navigation Key:

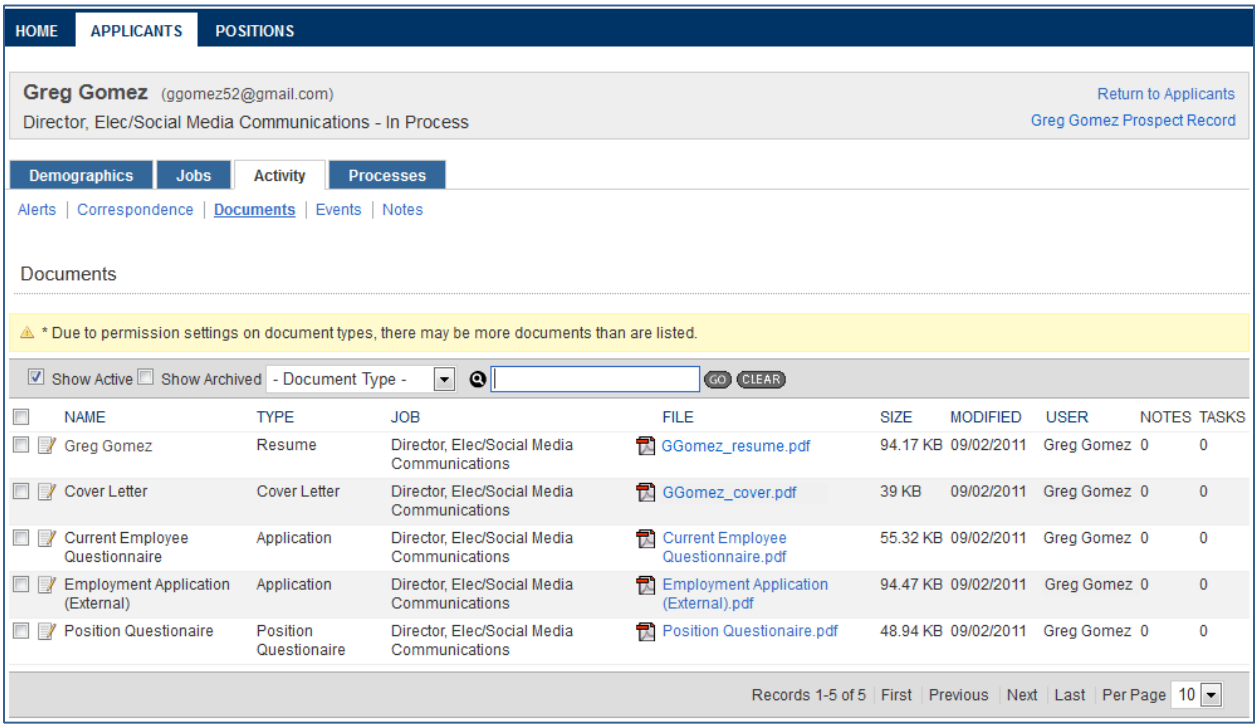
A	Click on the circle in the APP column to quickly find all documents available for that applicant	**B**	Click on an applicant's name to go to the Demographics page for that applicant

The navigation key above shows you how to locate application documents for individual applicants. For most applicants, you will find the following documents [Screenshot 19, 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 the Applicants by Hiring Manager screen in the EMP column [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 19 – Documents List in Applicants Tab:



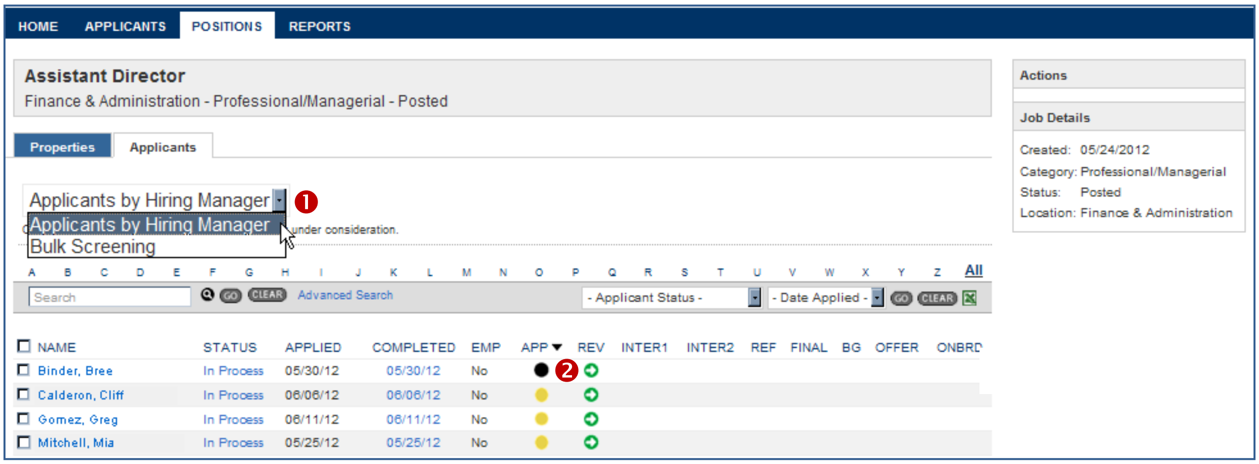
Other documents (e.g., writing samples, certifications, clearances, etc.) may be attached by the applicant, as desired, or as directed by the position posting. When reviewing documents, you may occasionally see duplicates or alternate versions of documents… once uploaded, neither the applicant nor the 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 3: Read Applicants' Documents

Once the preliminary screening has been completed, a more careful document review of the remaining applicants needs to be done to identify the candidates most qualified to move forward.

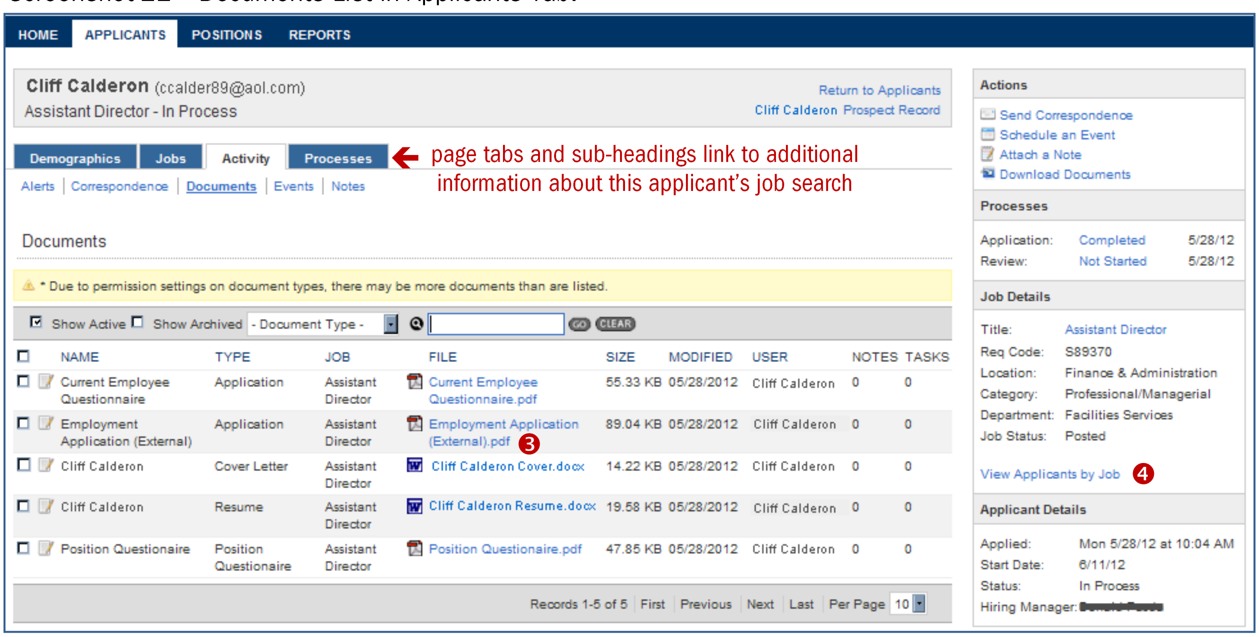
- If you are still in the Bulk Screening view, switch to the Applicants by Hiring Manager view to start moving applicants through the employment process [❶]

Screenshot 20 – Changing Screen Views:



- Select the circle in the APP column [❷] to bring up the documents list [Screenshot 21]

Screenshot 21 – Documents List in Applicants Tab:

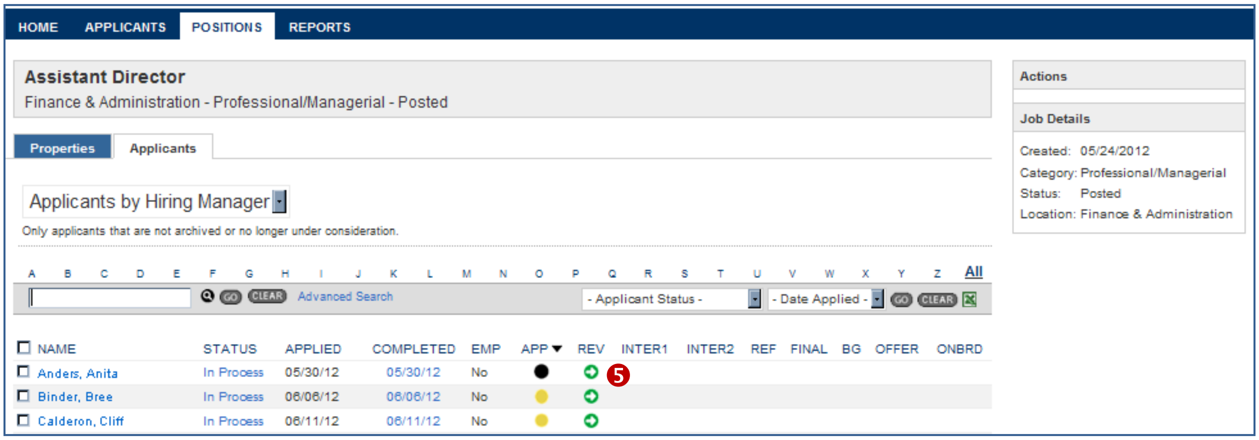


- Open each desired document by simply clicking the specific document file [❸]

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
- Once you've assessed an applicant's qualifications, click the View Applicants by Job link [Screenshot 21, ❹, previous page] to return to the main screen [Screenshot 22, below].

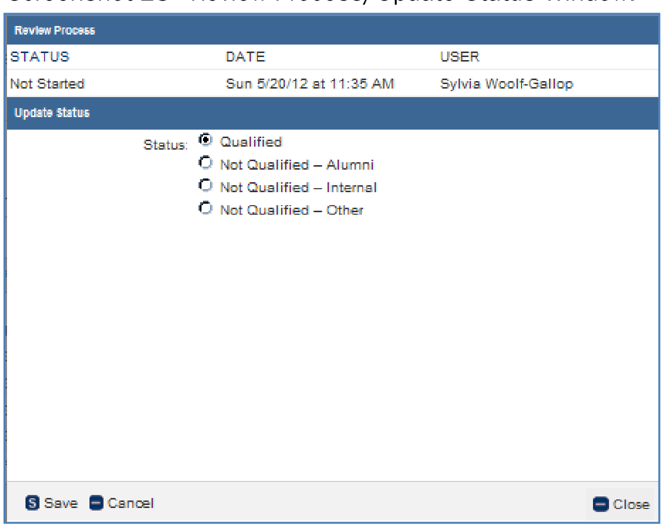
Screenshot 22 – Applicants by Hiring Manager Screen:



The action taken next will depend on whether the applicant is deemed "qualified," "maybe qualified," or "not qualified."

Qualified – if you like this applicant's qualifications use the Update Status window to move the candidate forward in the process.

Screenshot 23 –Review Process/Update Status Window:



- Click the ➲ in the REV (review) column [Screenshot 22, ❺]
- When the Update Status window appears [Screenshot 23], mark the applicant as "Qualified," and hit the save button to return to the main screen; the ➲ should now be under INTER1.

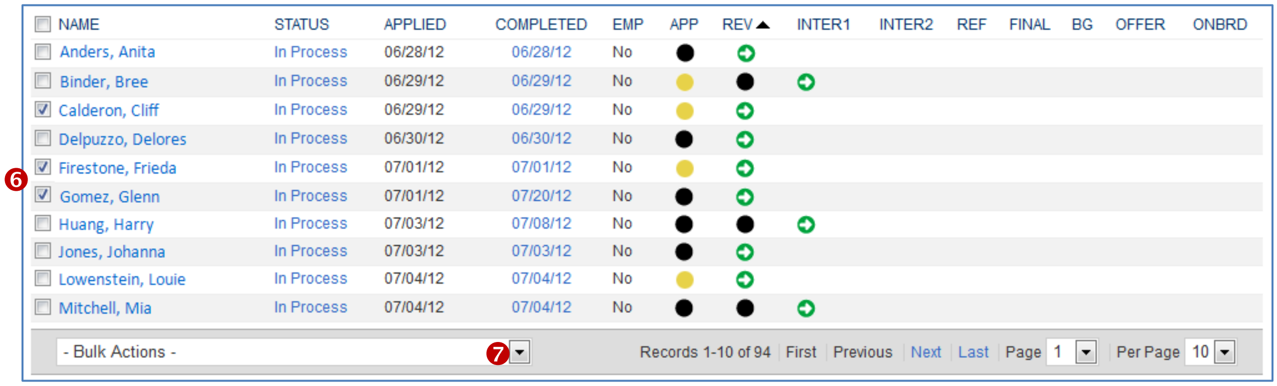
Maybe Qualified – sometimes an applicant meets the minimal qualifications but you're not ready to move the applicant to the interview step but still want to keep this person in your applicant pool.

- Don't take any action, just leave "as is" for now; the ➲ remains under REV.

Not Qualified – if you decide that this applicant is not a good match for your position, use the Bulk Actions menu to notify and remove the applicant from view.

- Click the radio button to the left of the applicant's name [Screenshot 24, ❻]

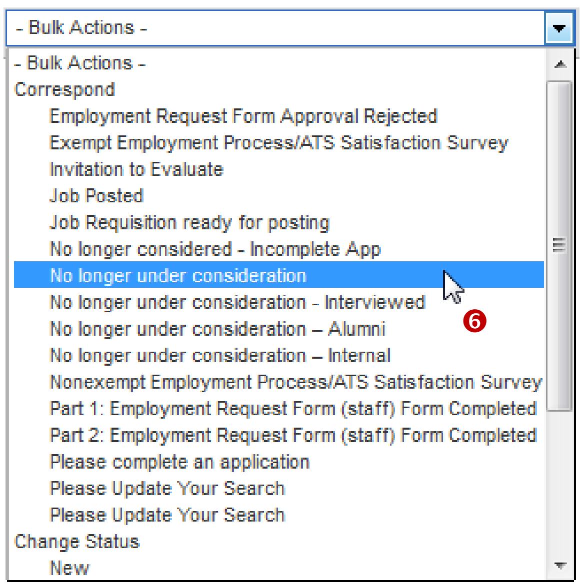
Screenshot 24 – Applicants by Hiring Manager Screen:



NAME	STATUS	APPLIED	COMPLETED	EMP	APP	REV ▲	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
☐ Anders, Anita	In Process	06/28/12	06/28/12	No									
☐ Binder, Bree	In Process	06/29/12	06/29/12	No									
☑ Calderon, Cliff	In Process	06/29/12	06/29/12	No									
☐ Delpuzzo, Delores	In Process	06/30/12	06/30/12	No									
☑ Firestone, Frieda	In Process	07/01/12	07/01/12	No									
☑ Gomez, Glenn	In Process	07/01/12	07/20/12	No									
☐ Huang, Harry	In Process	07/03/12	07/08/12	No									
☐ Jones, Johanna	In Process	07/03/12	07/03/12	No									
☐ Lowenstein, Louie	In Process	07/04/12	07/04/12	No									
☐ Mitchell, Mia	In Process	07/04/12	07/04/12	No									

- Then click the bulk actions drop-down [❼]

Screenshot 25 – Bulk Actions Menu:



- Select the applicable No longer under consideration email from the Correspond options listed
- 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 your view.

FYI… Marking an applicant as "not qualified" in the Update Status window [Screenshot 22, previous page] *will automatically trigger the corresponding "no longer under consideration" email notification without an opportunity to review or edit it first. You can use this option but most hiring managers prefer to use the Bulk Actions menu to notified not qualified candidates.*

After completing in-depth applicant screening, you should now have a more manageable pool of qualified candidates for your search. Still have too many candidates? Review qualified candidates again and select the top four to six candidates for the next step of the process. If working with a search committee, you may enlist the aid of the committee members to perform the final screening.

Preliminary Phone and/or First Campus Interview(s)

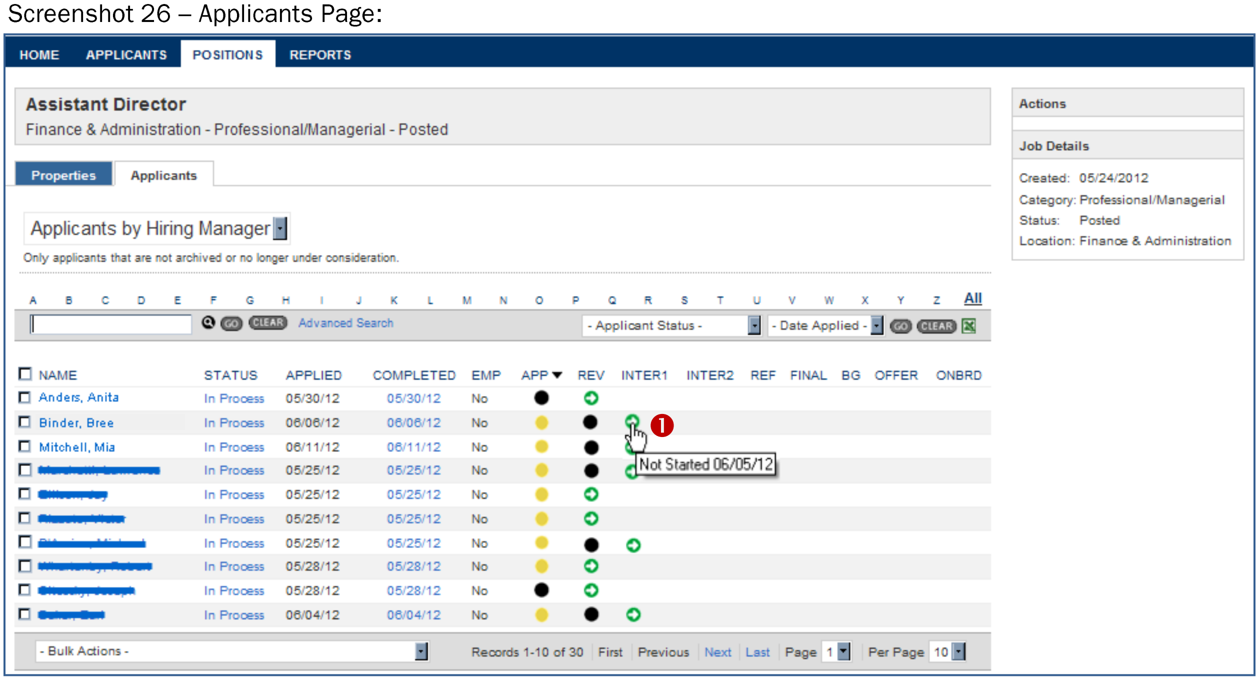
The ATS has been configured to correlate with the most common Lehigh search practices. For decentralized exempt searches, most departments will conduct at least two on-campus interviews, with or without a preliminary phone interview. First on-campus interviews are usually conducted by the hiring manager with the candidates whose qualifications best match the position’s requirements. Inviting four to six candidates for first campus interviews is typical.

Task 4: Schedule an Interview “Event”

Each interview needs to be documented in the ATS. This includes preliminary phone interviews as well as first and second campus interviews. You will use the “event scheduling” function to do this.

- There should now be a ➲ in the INTER1 column for each qualified candidate identified during the screening process; you can hover your mouse over the ➲ icon for more information, including the date the status was applied

Screenshot 26 – Applicants Page:

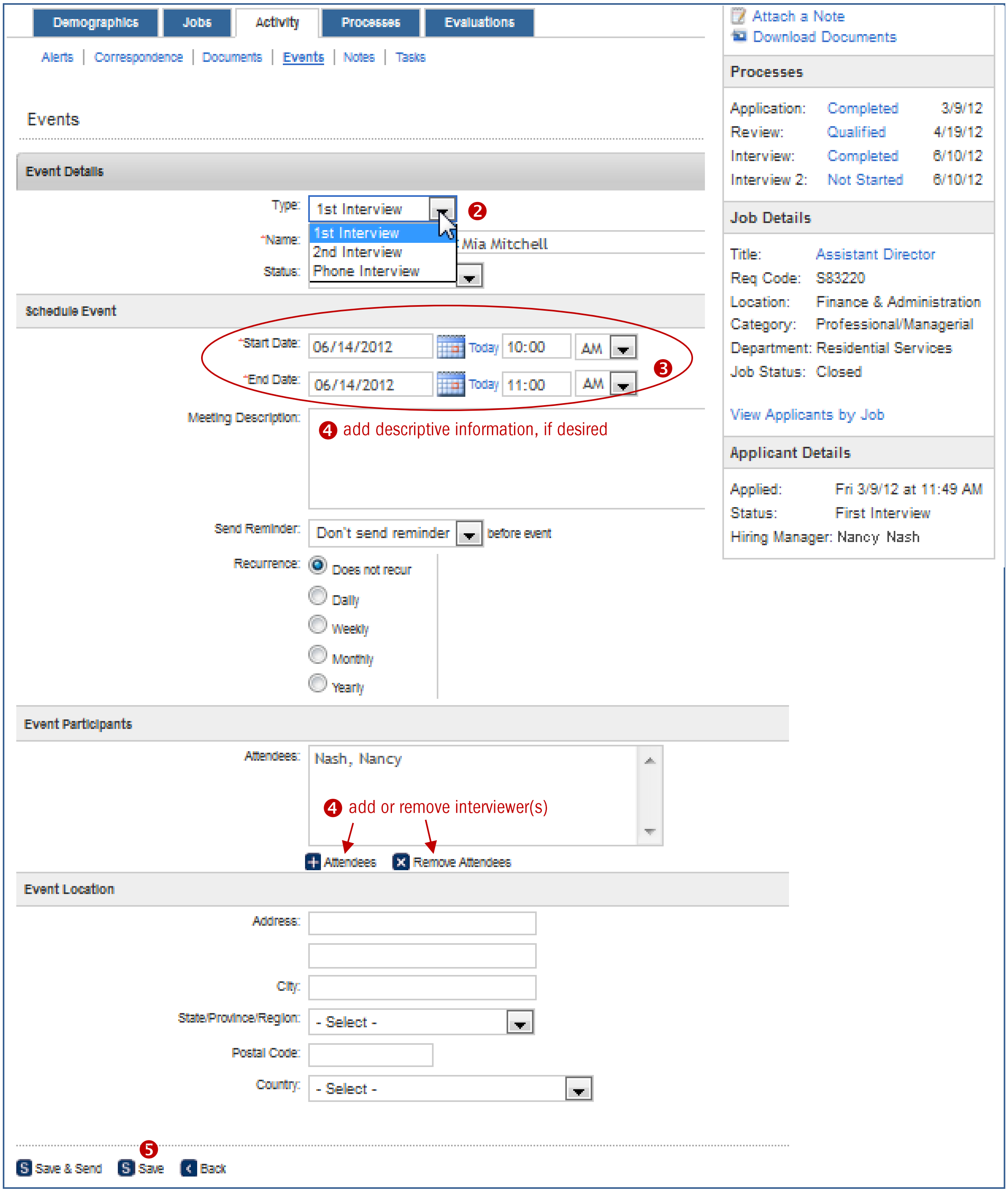


- Click the ➲ to schedule the desired candidate for the first or preliminary phone interview [❶]; the event scheduling template opens [Screenshot 27, next page]
- Use the drop-down button to select the appropriate event type [❷]

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

- Select the appropriate Start Date, End Date (probably the same date), and times [❸]; review and modify the remaining information, as appropriate [❹].

Screenshot 27 – Events Template:



- Review and confirm all information on the Events template; once saved, it cannot be deleted

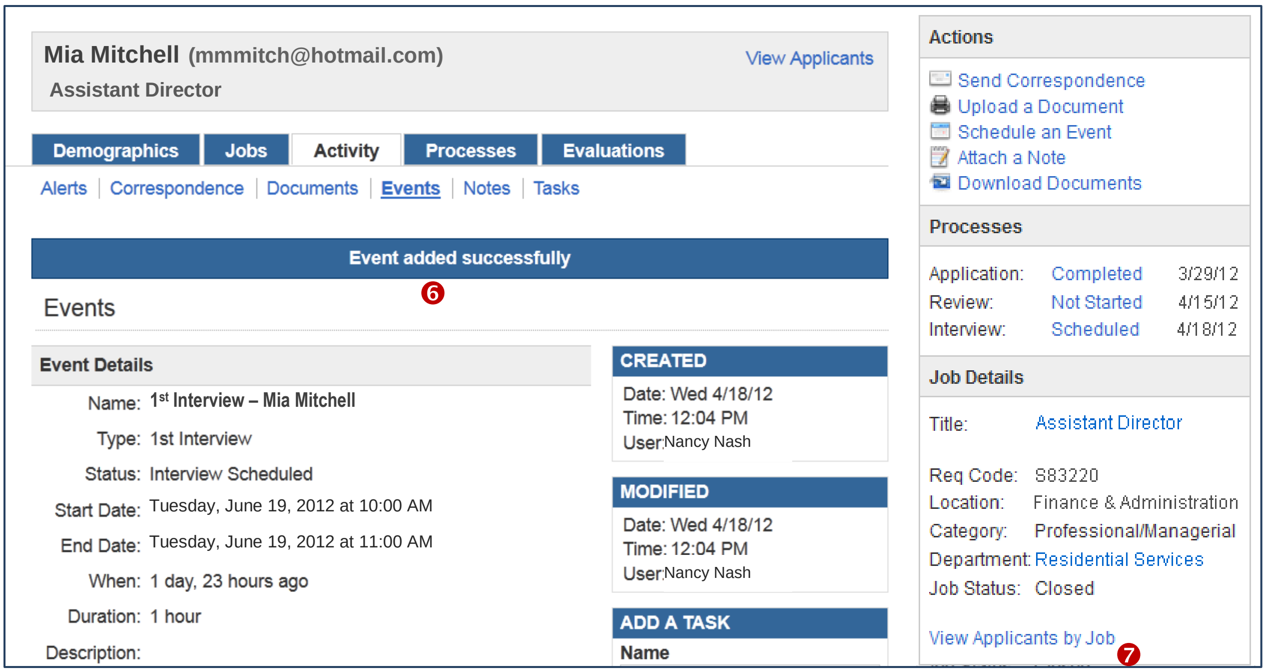
  You can reschedule a particular type of event (i.e., first interview, second interview, or phone interview) which will overwrite the previous event of the same type

➢ 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 28, ❻]

Screenshot 28 – Event Confirmation:



➢ Click on the View Applicants by Job link [❼] to return to the Applicants by Hiring Manager screen

➢ If a phone interview event was entered and saved, you will not see a 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 you scheduled a first interview event, then you will see a ◒ 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 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 hiring manager and/or admin support person should update their personal calendar(s) accordingly.

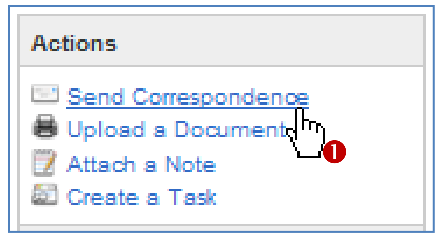
Scheduling the First Interview *event in the ATS triggers two automatic emails from the ATS to the hiring manager. The first contains information about conducting interviews and includes an attachment of sample behavioral questions based on university success factors. The second email is a reminder to update your search including documenting your interviews by attaching notes.*

Task 5: Send Correspondence

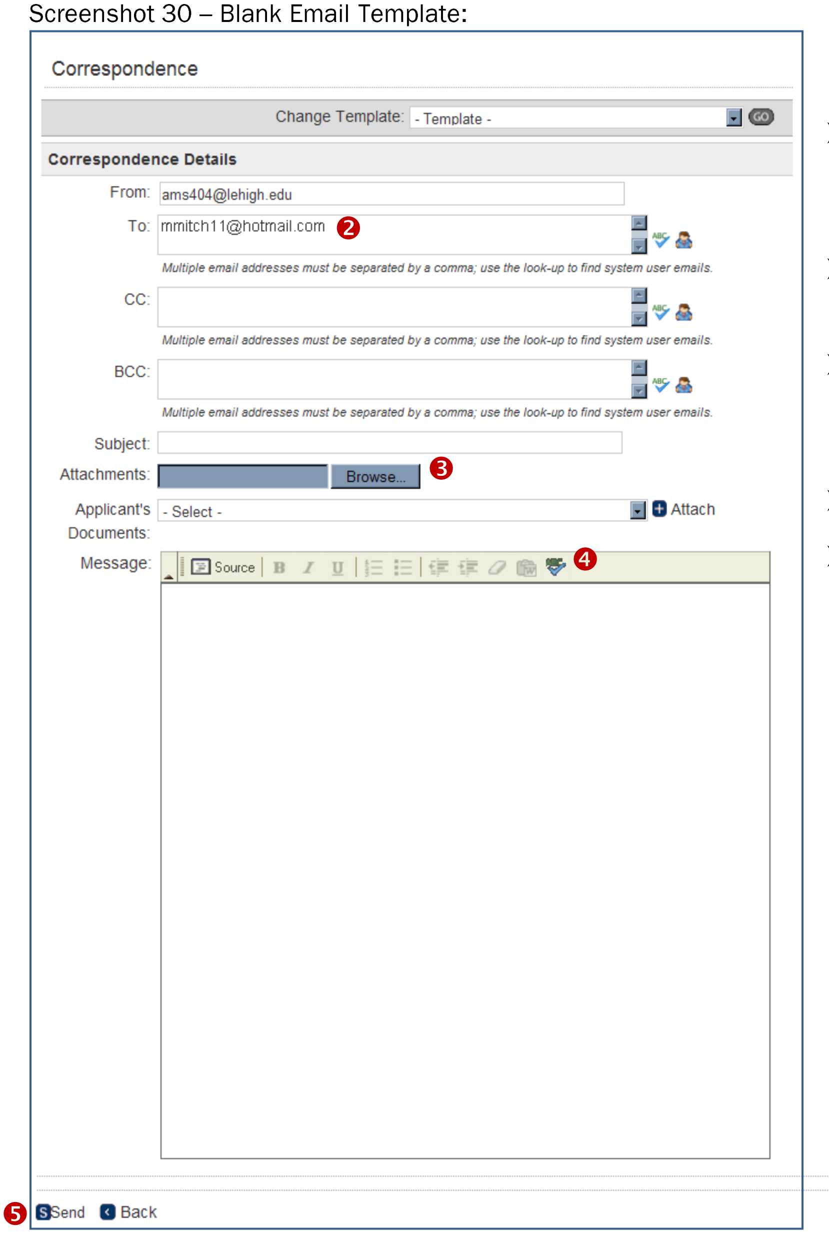
All email correspondence with applicants should be sent though the applicant tracking system using the Send Correspondence link from the Demographics page. Others involved in the interview process may be copied on emails sent through the ATS. Emails may include itineraries, directions, parking instructions, contact names, or other customized information and attachments.

- From the Applicants by Hiring Manager screen, click the desired 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 29, ❶]
- A blank email template will appear [Screenshot 30]

Screenshot 29 – Actions Menu:



Screenshot 30 – Blank Email Template:



- 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, agenda, directions, etc.) [❸]
- Spell check your message [❹]
- When finished, click Send [❺].

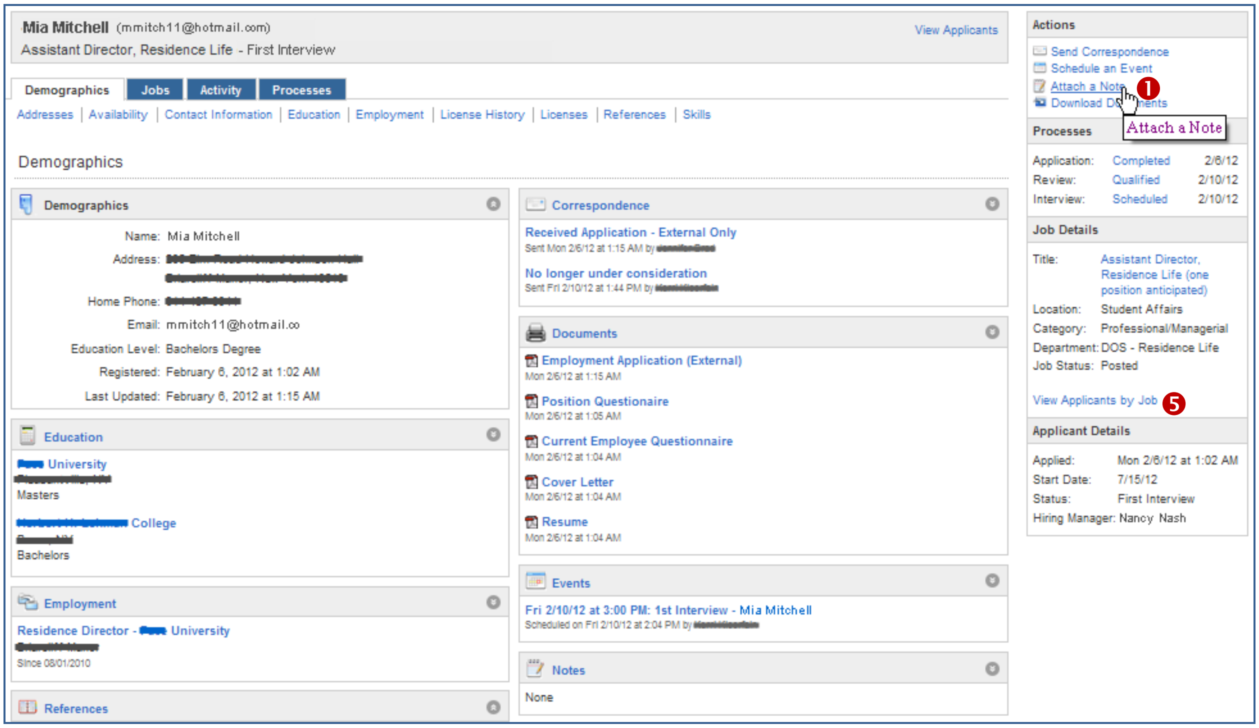
The Actions box appears top right on both the Applicants by Hiring Manager screen and on the Demographics page. Actions initiated from the Applicants by Hiring Manager screen will be generic to the search. Actions initiated from an applicant's Demographics page will be specific to that applicant's record.

Task 6: Add a Note

After conducting each phone interview and/or first campus interview, you must add a note 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.

- ➢ From the Applicants by Hiring Manager screen (POSITIONS tab/Applicants page), click on the name of the candidate who was interviewed; this will bring you to the Demographics page in the APPLICANTS tab for this particular candidate [Screenshot 31]

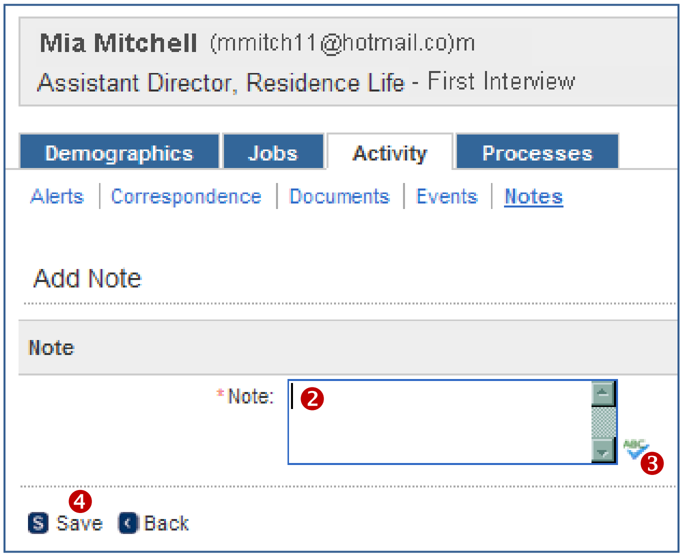
Screenshot 31 – Demographics Page of Applicants Tab:



- ➢ In the Actions box, click on the Attach a Note link [❶]
- ➢ A small Add A Note window will open [Screenshot 32, next page]

- Type a short note in the space provided [Screenshot 32, ❷]. A spell check feature [❸] is available.

Screenshot 32 – Actions/Add A Note Window:



- 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. An additional 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 31, 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, page 26].

Attached notes are discoverable in the event of an employment audit, discrimination charge, or other legal action. Limit your notes to the 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 you've conducted the phone interview and added a note to the system, you're done with that event. However, after conducting the first campus interview, you will need to complete the First Interview step within the ATS.

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

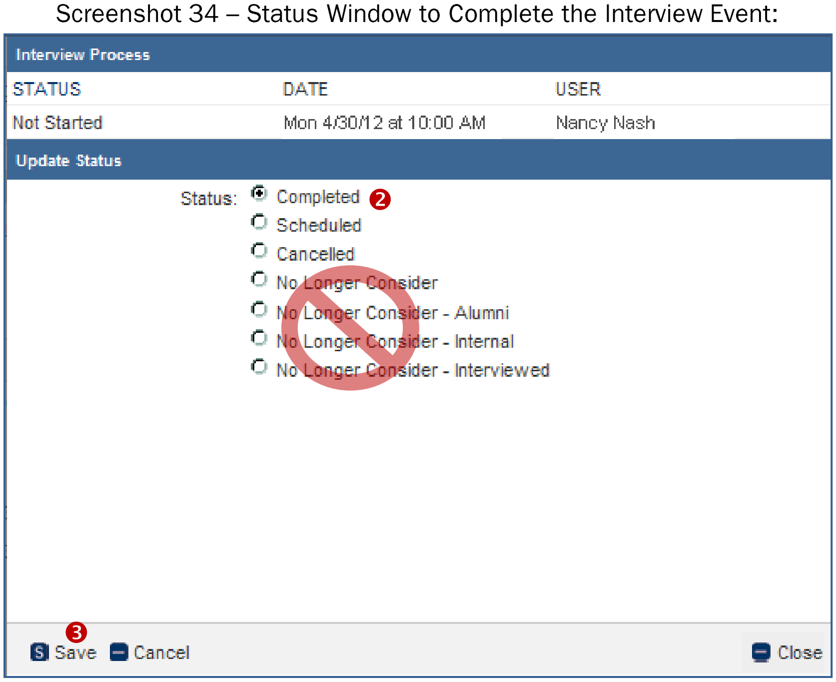
- From the Applicants by Hiring Manager screen, click the ◒ icon [❶] in the INTER1 column for a candidate who was interviewed

Screenshot 33 – 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			❶						
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 34]

Screenshot 34 – Status Window to Complete the Interview Event:



- Select Completed [❷]
- Click Save to close window [❸].

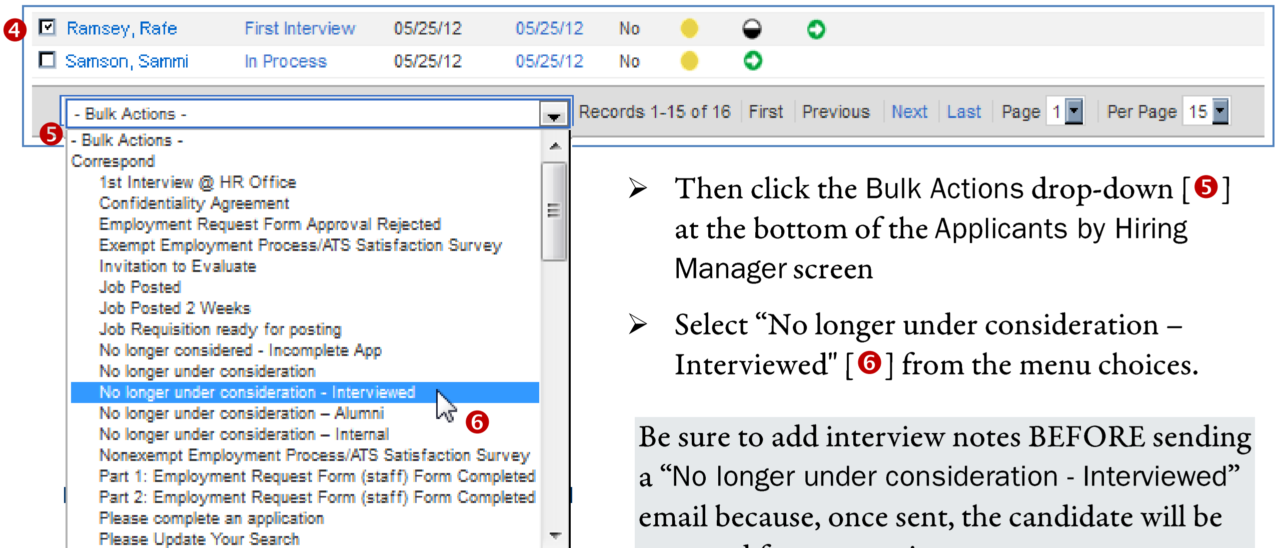
Although there are several "No Longer Consider" options available, using one of these choices automatically sends a "regrets" email to the candidate without any opportunity to review or edit the content. Most hiring managers prefer to use the bulk actions method of removing interviewed candidates from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

After the First Interview step has been completed, you will see that the ◒ icon has changed to ● in the INTER1 column and the action ➲ icon has moved to the INTER2 column for this candidate.

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, Screenshot 35] next to the candidate who was interviewed but is no longer under consideration for the position

Screenshot 35 –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.

Be sure to add interview notes BEFORE sending a “No longer under consideration - Interviewed” email because, once sent, the candidate will be removed from your view.

- 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
- A new window opens with a standard “no longer ” email template
- Edit the message, as desired, to customize it for the interviewed candidate
- 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.

  The email will be sent and 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 (ext. 83916) if you need assistance.

Second Interview(s)

Once you have completed your First Interview step, it’s time to select the top two or three candidates whose qualifications best match your position’s requirements. This is the responsibility of the hiring manager but may include recommendations from search committee members, if applicable. You or your designated admin support person will need to set up and arrange your next round of on-campus interviews in the usual manner, including contacting the candidate to schedule and confirm a date and time.

The Second Interview may be a single interview with the hiring supervisor, a group interview with a search committee or departmental staff, or a series of individual or small group interviews. Within the ATS, these are considered a single Second Interview event.

You will need to schedule, document, and complete the Second Interview event following the same procedures used for the First Interview event.

Task 8: Schedule an Interview “Event” (Second Interview)

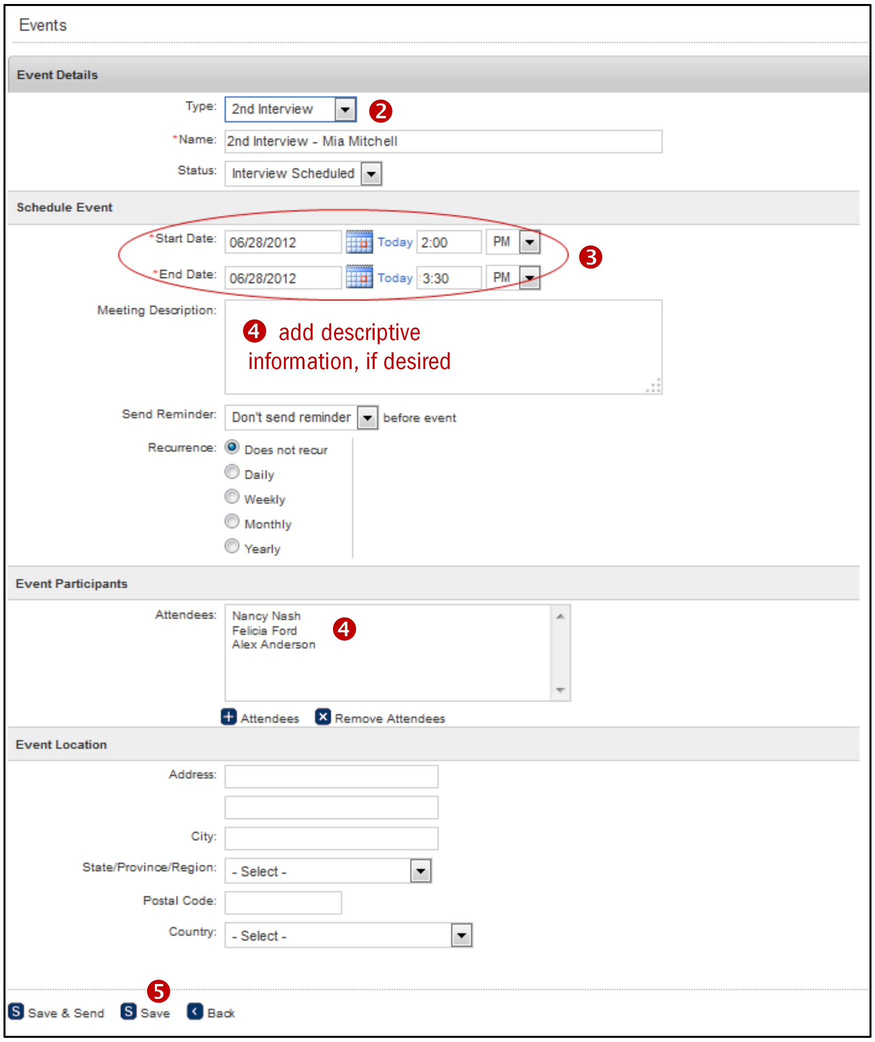
On the Applicants screen, there should now be a ➲ in the INTER2 column for each candidate who successfully completed the First Interview:

Screenshot 36 – Positions Tab/Applicants Page:

☐	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	●	➲							

- Click the ➲ in the INTER2 column [❶] to schedule the candidate for the Second Interview; the events template opens [Screenshot 37, next page]

Screenshot 37 – 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 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, a summary note needs to be entered into the ATS to record the interview result(s). When working with search committees, individual committee members can each add a note documenting the result of the interview(s) in which he/she participated. Alternatively, one designated person (e.g., hiring manager, admin support person, or committee member) can collect feedback from search committee members and add a single summary note. Each note is dated and time stamped along with the name of the person who entered the note.

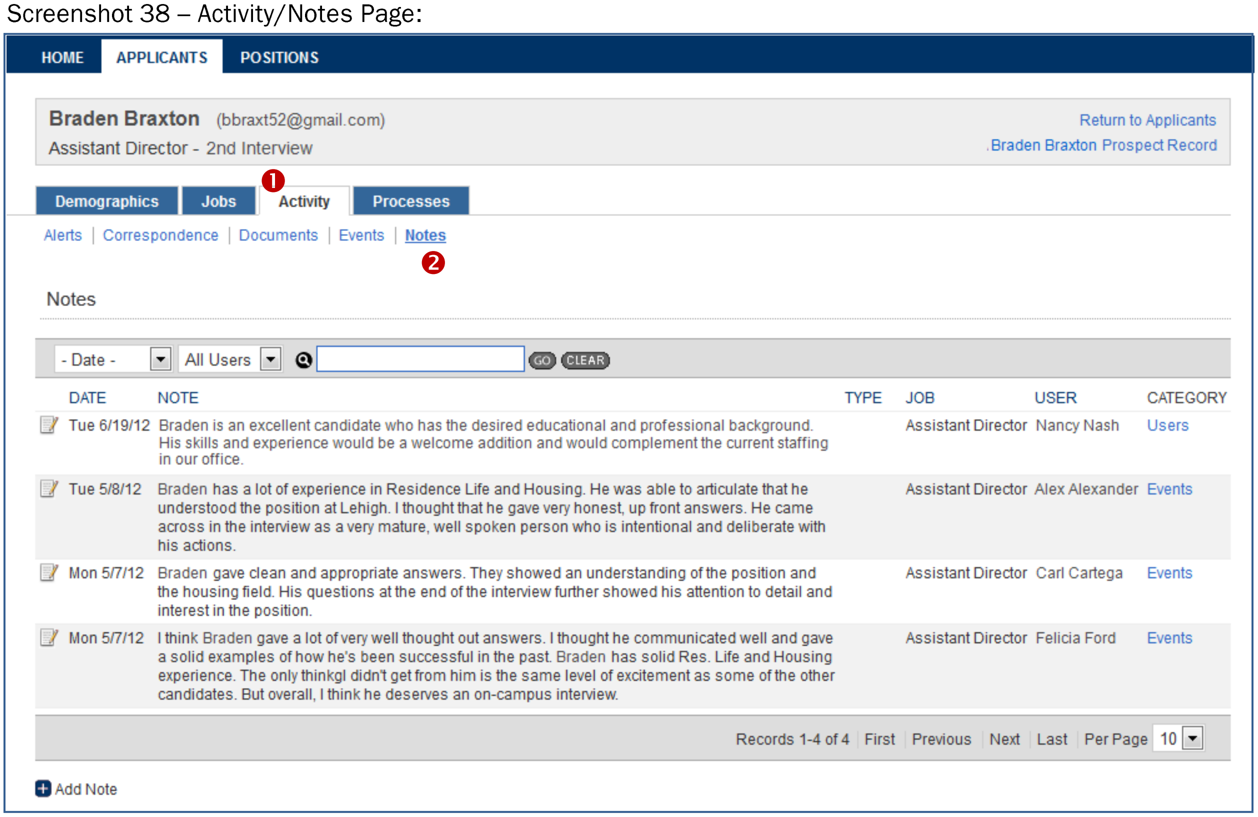
- Refer back to Task 6: Add a Note (pages 30-31) for directions on adding a note to a candidate's record.

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 should be instructed accordingly.

To see a list of all notes entered about a particular candidate [Screenshot 38]:

- 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 38 – Activity/Notes Page:



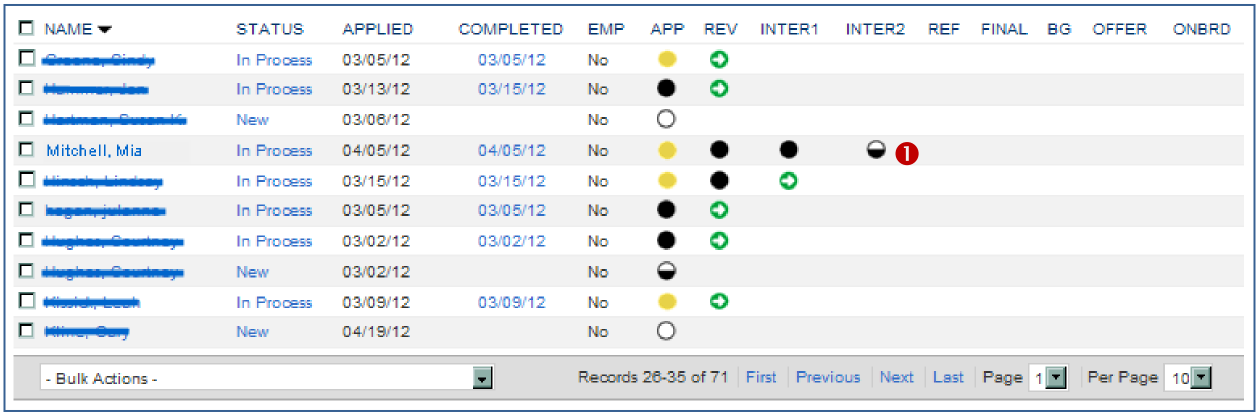
Task 11: Complete the Second Interview "Event"

After the Second Interview(s) is(are) finished and the result(s) entered as notes, you will need to complete the Second Interview step within the ATS.

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

- From the Applicants by Hiring Manager screen [Screenshot 39], click the icon [❶] in the INTER2 column for the candidate who was interviewed

Screenshot 39 – Applicants by Hiring Manager Screen:

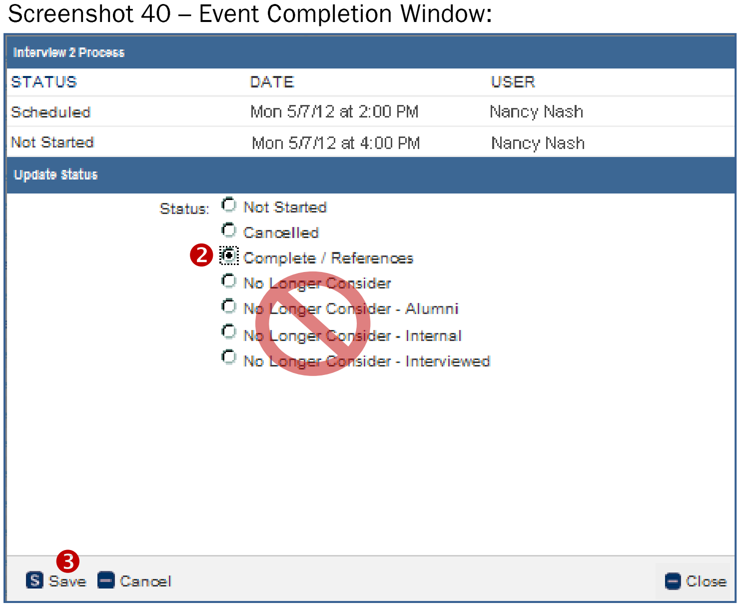


NAME	STATUS	APPLIED	COMPLETED	EMP	APP	REV	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
[redacted]	In Process	03/05/12	03/05/12	No									
[redacted]	In Process	03/13/12	03/15/12	No									
[redacted]	New	03/06/12		No									
Mitchell, Mia	In Process	04/05/12	04/05/12	No									
[redacted]	In Process	03/15/12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

- Bulk Actions - Records 26-35 of 71 | First | Previous | Next | Last | Page 1 | Per Page 10

- The Update Status window will open [Screenshot 40]

Screenshot 40 – Event Completion Window:



- Select Complete/References [❷]
- Click Save to close window [❸].

After the Second Interview step has been completed, you will see that the icon has changed to in the INTER2 column and the action icon has moved to the REF (references) column for this candidate.

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

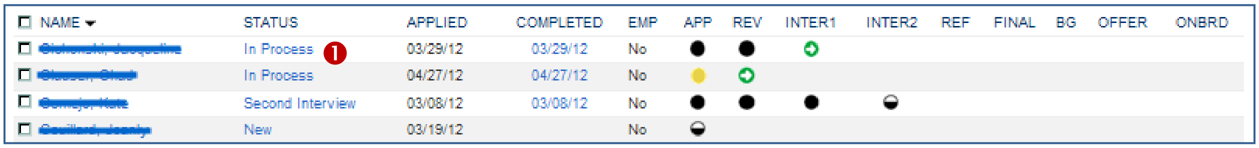
For candidates who will be **no longer considered** for the position:

- 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 41] is a STATUS column that shows the current status of all applicants listed. As you work your way through the various process steps, you will see the status of the various candidates change.

Screenshot 41 – Applicants by Hiring Manager Screen:



Sometimes a candidate will withdraw from the process or accept another position. You will need to document this status change and remove the candidate from your view. Here's how:

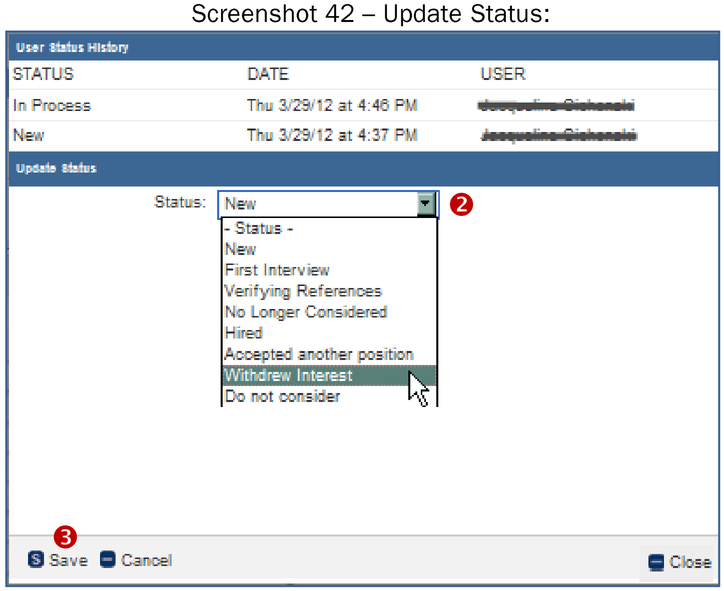
First, add a note to the candidate's record (required only for withdrawals):

- From the Applicants by Hiring Manager screen, click on the name of the candidate who was interviewed; this will bring you to the Demographics page for this particular candidate
- In the Actions box (right menu), click on the Attach a Note link
- Type a short note; review spelling and content for errors
- Click on Save to record your 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]; an Update Status window opens
- Use the drop-down button to select the new status [❷]
- Click Save [❸].

Screenshot 42 – 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 your open position. You and/or your 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 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 you are ready to proceed with reference checks on this finalist. You will receive an email from HR [Screenshot 43] that outlines the procedure to follow along with attached information and tips for conducting reference checks. This information should be forwarded to the designated search committee member, if applicable.

This automatic email from HR is triggered when the hiring manager completes the Second Interview *event and selects "Complete / References" from the event completion window for a particular candidate. [Refer back to* Screenshot 39, *page 38].*

Screenshot 43 – 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.

Task 13: Check References

Candidates are requested to supply the names of references as part of their application process. However, it is preferable to contact the candidate's current and former supervisors, if possible. The employment application is the best source of this information.

- From the Applicants by Hiring Manager screen, click on ● in the APP column for this particular finalist [Screenshot 44, ❶]

Screenshot 44 – Applicants By Hiring Manager Screen:

☐ NAME ▼	STATUS	APPLIED	COMPLETED	EMP	APP	REV	INTER1	INTER2	REF	FINAL	BG	OFFER	ONBRD
☐ Lewis, Letisha	First Interview	03/09/12	03/09/12	No	●	●	●						
☐ Mitchell, Mia	References Pending	03/21/12	03/21/12	No	❶ ●	●	●	●					
☐ Ramone, Ricky	First Interview	03/18/12	03/18/12	No	●	●	●						

- The documents list for this finalist appears [Screenshot 45]

Screenshot 45 – Documents List:

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
☐	Current Employee Questionnaire	Application	Assistant Director	Current Employee Questionnaire.pdf	55.33 KB	03/21/2012	Mia Mitchell	0	0
☐	Employment Application (External)	Application	Assistant Director	Employment Application (External).pdf ❷	84.55 KB	03/21/2012	Mia Mitchell	0	0
☐	Mitchell Cover Letter	Cover Letter	Assistant Director	Mitchell Cover Letter - Lehigh ADRS.doc	24.50 KB	03/21/2012	Mia Mitchell	0	0
☐	Mitchell Resume	Resume	Assistant Director	Mitchell Resume - Lehigh ADRS.doc	44 KB	03/21/2012	Mia Mitchell	0	0
☐	Position Questionaire	Position Questionaire	Assistant Director	Position Questionaire.pdf	48.04 KB	03/21/2012	Mia Mitchell	0	0

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- Select the Employment Application link [❷] to open this document
- Locate the employment history within the Employment Application [see Screenshot 46; next page]; specifically, you are looking for the names and contact numbers of current and/or previous supervisors.

> ***Be sure the finalist is aware that you will be contacting his/her current supervisor before doing so.***

Plan on contacting at least two people to obtain work-related references. You'll need at least two positive references 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. The reference check form provided by HR includes a list of appropriate questions.

Screenshot 46 – Employment Application Detail:

Employment

Please list all employment activity. List most recent employer first. ***At least one employment record is required.*** If you do not have any employment history, please enter 'N/A' in all required fields.

Title:	Facilities & Operations Manager
Employer Name:	University of Newark
Phone Number:	302-555-1597
Address:	5414 Founders Way
City:	Newark
State:	Delaware
Postal Code:	91712
Is this your current employer?	No
Start:	April 1, 2011
End:	May 1, 2012
Salary:	80,000
Ending Salary:	80,000
Duties:	Managed the facilities planning and services department for a university consisting of 75+ across four sites.
Reason for Leaving:	Looking for new challenges
Supervisor Name:	George Genovese
May we contact this employer for a reference?	

Title:	Facilities/Maintenance Supervisor
Employer Name:	Washington Community College
Phone Number:	301-555-8523
Address:	74 Avenue C
City:	Hagerstown
State:	Maryland
Postal Code:	21742
Is this your current employer?	No
Start:	October 1, 2004
End:	March 1, 2011
Salary:	69000
Ending Salary:	75000
Duties:	Managed the physical plant operations for a large community college.
Reason for Leaving:	Offered attractive opportunity to larger institution.
Supervisor Name:	Taylor Truman
May we contact this employer for a reference?	

Finalize Candidate Status

Once you have completed the requisite reference checks for your finalist(s) and are satisfied with the results, contact HR to discuss findings and your top finalist selection. If you had requested any job-related skill tests during the initial search consultation, the finalist(s) will be asked to complete these tests at this time.

Upon satisfactory completion of the reference checks for a particular finalist, HR will change the finalist's status within the ATS to Final. No action is required from the hiring manager.

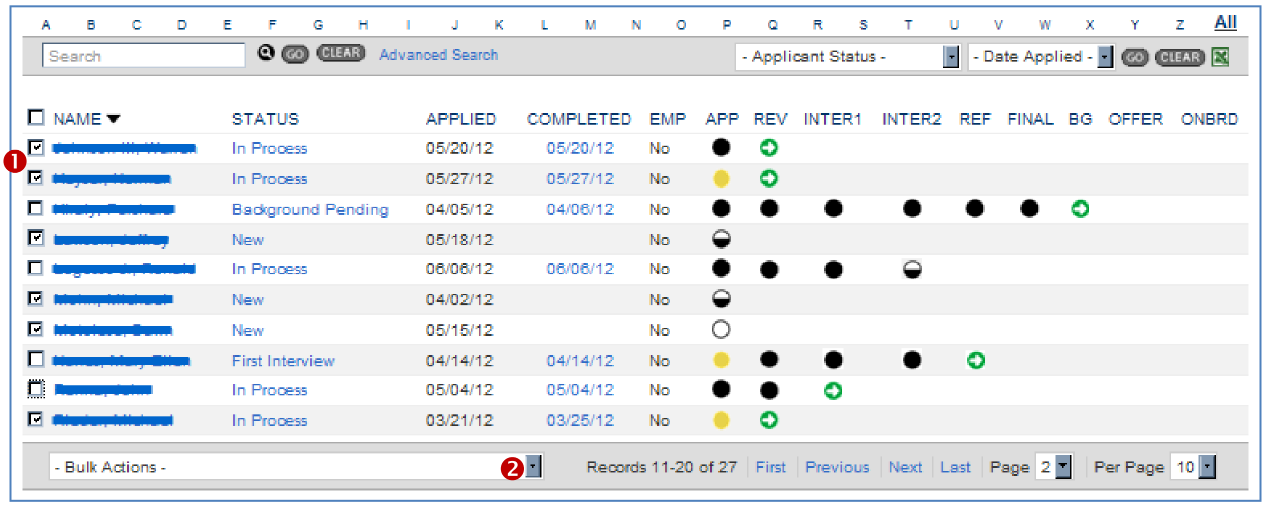
Within the Applicants by Hiring Manager screen, a black circle ● will now appear in the Final column for that finalist and a green arrow ➲ will appear in the BG (background checks) column.

Task 14: Update the Search

Although many applicants and candidates were removed from further consideration at various points in the search process, you will still have 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 your position. You can start and continue this process at any time while your search winds down to its conclusion but your screen should consist of only the finalist(s) by the time you are ready for background checks and anticipating a verbal offer of employment.

Use the Applicants by Hiring Manager screen [Screenshot 47].

Screenshot 47 – Applicants by Hiring Manager Screen:



- ➢ Start by clicking the selection box [❶] next to each candidate to be removed from the search

  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

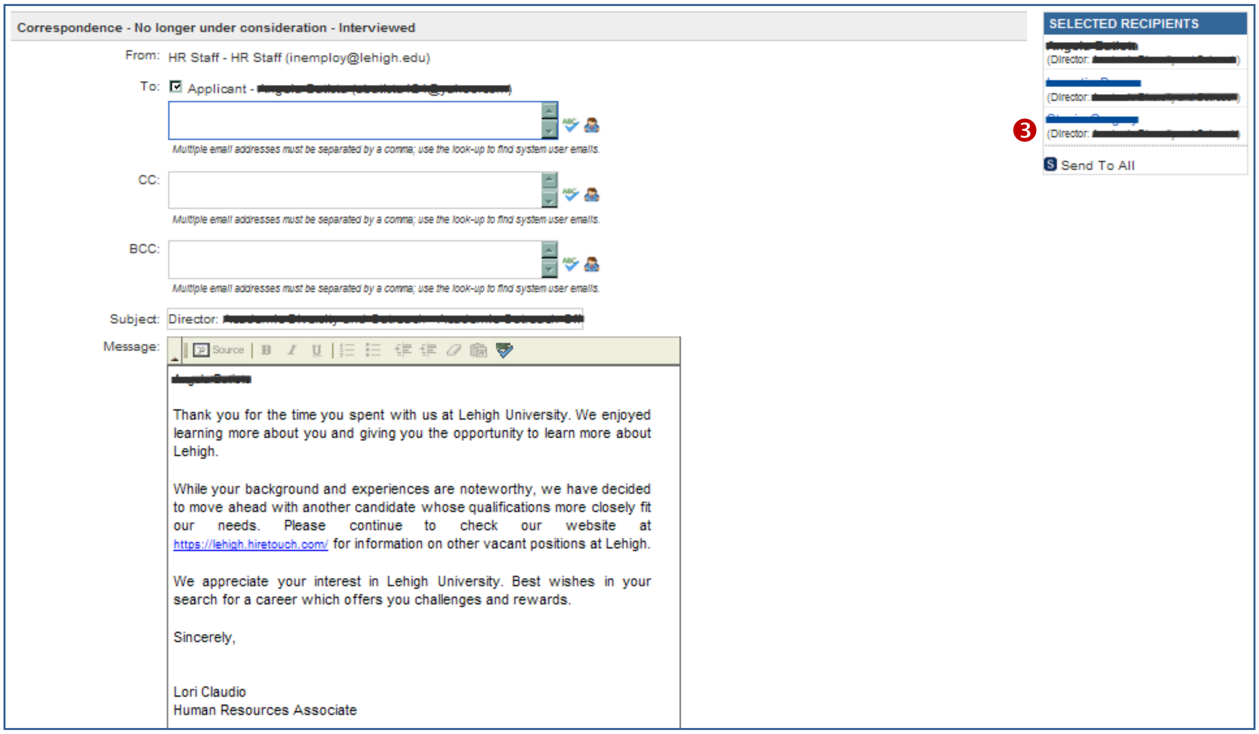
- ➢ Select the appropriate bulk action from the drop-down menu [❷]:
  - No longer under consideration
  - No longer under consideration – Interviewed
  - No longer under consideration – Alumni
  - No longer under consideration – Internal

  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 you wish to take this action; click OK

➢ The email template appears [Screenshot 48]; fill in the appropriate fields

Screenshot 48 – Bulk Email Template (No longer under consideration – Interviewed):



➢ You can personalize and/or edit the content of the email message

➢ 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, you'll be returned to the Applicants by Hiring Manager screen and you'll see that this group of applicants/candidates has disappeared from view.

Standard message content for the four versions of the "no longer under consideration" email template is provided in the addendum 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.

Task 15: Verbal Offer of Employment

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
- 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; an appropriate hiring range is developed based on a number of factors including the finalist's background and experience, comparable hiring data, and current salaries and seniority of incumbents in similar positions across campus
- Other – e.g., 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.

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 50], 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. As hiring manager, you will also receive an email from HR containing information for onboarding your new hire.

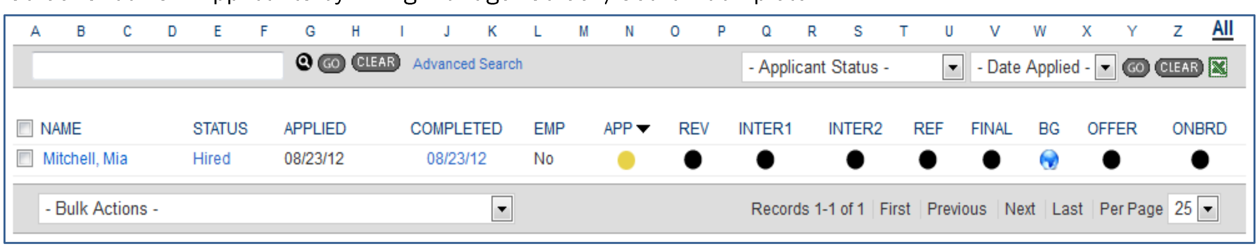
Task 17: Track Final Steps of Hiring Process

You can monitor the progress of the offer and onboarding steps 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 49]. If not, finish updating the search. See Task 15: Update the Search.

Screenshot 49 – Applicants by Hiring Manager Screen/Search Complete:



Closing Comments

At the conclusion of your search, you will be sent a survey requesting feedback regarding your experience using the ATS as well as your satisfaction regarding the entire employment process. We hope you will take the time to respond to this survey. Your feedback is very important to us in order to provide the best support and service possible to all Lehigh hiring managers.

This User's Guide for Hiring Managers focuses on the specific tasks associated with utilizing the HireTouch applicant tracking system (ATS) for conducting a de-centralized open position search. A similar User's Guide is available for hiring managers conducting centralized searches. Alternate versions of this User's Guide are available for search committee members 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