



# THE KEYS TO DOCUMENTATION

One of the most important parts of running an effective search is documenting your process and the outcome. This is done by adding notes in the applicant tracking system (Page Up). Appropriate documentation in a search file is used to prove legality and compliance with employment laws and company policies. If audited or sued your documentation will be a key piece of information used to decide an outcome.

## ADDING NOTES

- Required to summarize interviews
- Each individual interview requires its own note
- Notes should encompass factual information only
- Detailed but not extensive (clearly identifies why or why not the person is advancing)
- Only use professional language no jargon or abbreviations

## THE NOs IN NOTES

- No comments on physical attributes such as "Looks too young"
- No comments referencing age, disabilities, ethnic background, religious affiliation, etc.
- No expressions or exclamatory language such as "No way"
- No jargon or acronyms relating to a cryptic system of evaluating candidates

## INTERVIEW DOCUMENTATION

- All interviews must be documented with date, time, and type of interview.
- Page Up offers a scheduling tool called Booking and Events - see user guide for instructions
- All candidates must be put through the same process

## REFERENCE DOCUMENTATION

- Indicate who you spoke with and what relation they have to the candidate
- These can be more concise than interview notes

All of this documentation serves as the primary point of reference when HR evaluates the overall hiring decision. Please keep in mind HR cannot approve and send out any offers until all events and notes are documented and all applicants have been notified as to their status in the search.