Recruiting for Hiring Managers
Introductions
• Please ask Questions
• We are monitoring CHAT
• We will “park” questions that require lengthy response or are beyond the scope of this training
• A copy of the deck & a link to our survey will be sent to all attendees
Course Agenda

1: Recruitment Process Overview
2: Job Opening Requests
3: Recruitment Document Suite
RECRUITMENT PROCESS OVERVIEW

MODULE 1
Pre-Recruitment Position Management Activities

1. Chancellor’s approval is required for ALL non-grant or contract funded positions, even temporary positions.

1. Create or update your position number in UCPath via the Position Control Request (PCR)
   a. Job code classification
   b. FTE (appointment percentage of time)
   c. Updates to department information
   d. Job description

APPROVED. I expect that your new hire will be amazing, just like you are.
Job Opening Request (JOR)

• The Job Opening Request form will be the next step in starting a recruitment. The form is located in the Staff HR Services catalog in IT Request

• The Job Opening Request form replaces all RMS Worksheets and will be used for the following steps in the recruitment process:
  – Submitting requests for all recruitments
  – Approving job posting
  – Submitting & approving job offers
  – Coordination & communication between:
    ▪ Hiring Managers
    ▪ Recruitment Approvers
    ▪ Talent Acquisition

So long RMS
Recruitment Approver Role

• A new approver role, the **Recruitment Approver (RA)***, is similar to the **Divisional Approver (DA)** role we used to have in RMS

• In the recruitment process, the **Recruitment Approver** is responsible for approving the following:
  – Job postings
  – Job offer details

*The Hiring manager can never act as the RA for their own recruitment.*
Recruitment Document Suite

• The Recruitment Document Suite contains reference documents to provide guidance and planning materials throughout the recruitment process

• This resource will be used to:
  – Access applications routed by Talent Acquisition
  – Document the screening of applicants and candidates
  – Document the disposition of all routed applicants
Competitive and Non-Competitive Recruitments

There are two broad recruitment types

- **Competitive Recruitments include:**
  - Open recruitments (open to the general public)
  - Campus-only recruitments (open to current UCSC employees)

- **Non-Competitive Recruitments include:**
  - Non-recruitments (temporary direct hire with no recruitment)
  - Waivers of recruitment (temporary or permanent direct hire with no recruitment)
Recruitment Process: Competitive Recruitments

Before the Initial Review Date (IRD)

1. Hiring Manager submits Job Opening Request
2. TA creates Job Posting in TAM and submits Job Posting for Approval in Job Opening Request
3. Recruitment Approver approves Job Posting in Job Opening Request
4. TA posts Job via TAM to the Candidate Gateways
5. Applicants apply via the Candidate Gateways

Before the Initial Review Date (IRD)
Recruitment Process: Competitive Recruitments

After the Initial Review Date (IRD)

- **TA Saves Applications to Recruitment Document Suite & Sends Link to Unit, to access those applications**
- **Hiring Manager Screens Applicants, Selects Candidate(s) and Completes Recruitment Documents**
- **Hiring Manager adds comments to Job Opening Request Form requesting access to add Selected Candidate(s)**
- **Hiring Manager Enters Job Offer Information**
- **Recruitment Approver Approves Offer(s)**
- **TA Extends Offer to Candidate(s)**
- **Candidate(s) Accepts Job Offer**
- **TA Completes the Hire(s)**
## What’s Changed?

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring manager submits RMS Worksheets (PDF) to initiate a recruitment</td>
<td>Hiring manager submits Job Opening Request form (webform) to initiate a recruitment</td>
</tr>
<tr>
<td>Different RMS Worksheets are used for different kinds of recruitment</td>
<td>All recruitment requests are handled with the same Job Opening Request form</td>
</tr>
<tr>
<td><strong>RMS Divisional Approver</strong> approves position updates, recruitment requests, and job offer requests</td>
<td><strong>Job Opening Request Recruitment Approver</strong> approves job postings and job offer requests</td>
</tr>
<tr>
<td>A separate RMS Job Offer Worksheet (PDF) is used to submit offers to TA</td>
<td>The Job Opening Request form handles job offers in the Selected Candidate section</td>
</tr>
<tr>
<td>Hiring committee uses Screening Matrix and Applicant Selection Log (spreadsheet) to communicate the screening process to TA</td>
<td>Hiring committee uses the Recruitment Document Suite (Google Drive) to communicate the screening process to TA</td>
</tr>
<tr>
<td>Screening Matrix and Applicant Selection Log are turned in after the recruitment is completed</td>
<td>Recruitment documents must be submitted to TA before the hiring manager can identify their selected candidate(s)</td>
</tr>
</tbody>
</table>
Recruitment Process: Non-Competitive Recruitments

1. Hiring Manager Submits Job Opening and Offer Request
2. TA Creates and Submits Job Posting for Approval in Job Opening Request
3. Recruitment Approver Approves Job Opening and Offer Request
4. TA Extends Offer to Candidate
5. Candidate Accepts Job Offer
6. Selected Candidate Submits a Generic Application through the Candidate Gateway
7. TA Completes the Hire
# Differences between Competitive and Non-Competitive Recruitments

<table>
<thead>
<tr>
<th><strong>Competitive Recruitment</strong></th>
<th><strong>Non-Competitive Recruitment</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring manager submits required recruitment documents in order to identify their selected candidate(s)</td>
<td>Hiring manager identifies their selected candidate(s) when entering the initial Job Opening Request</td>
</tr>
<tr>
<td>Applicants apply to a specific job through the Candidate Gateways</td>
<td>Applicant creates a generic application in the Candidate Gateway, which TA links to the job opening</td>
</tr>
<tr>
<td>The Recruitment Document Suite is used to document the screening process</td>
<td>The Recruitment Document Suite is <strong>NOT</strong> used</td>
</tr>
</tbody>
</table>
# Roles and Responsibilities

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
</tr>
</thead>
</table>
| Hiring Manager (or designee)     | • Submit Job Opening Request  
• Complete all required documents in Recruitment Document Suite  
• Communicate with applicants about their final recruitment status  
• Submit job offer details in Job Opening Request |
| Recruitment Approver             | • Approve job posting preview in Job Opening Request  
• Approve job offer(s) in Job Opening Request |
| Talent Acquisition               | • Create and post job opening in Talent Acquisition Manager (TAM)  
• Prepare Recruitment Document Suite  
• Route applications to hiring manager  
• Extend job offers to selected candidate(s) |
| Applicant                        | • Apply to job opening in Candidate Gateway  
• Accept job offer in Candidate Gateway |
Job Opening Request (JOR)

• If updates to the position are required, you will need to complete a **Position Control Request** before recruitment activity can begin.

• Submit your request for a new recruitment through the **Job Opening Request (JOR)** form, in the **Staff HR Services** catalog within **IT Request**.

• You will enter recruiting information about one or more position(s) and how you want them filled.

• Talent Acquisition will get all position information, including the job description, from the position in UCPath.
Job Opening Request (JOR) – Navigation

Go to \texttt{ucsc.service-now.com} and log in with your CruzID and gold password.

In the left navigation bar, go to \texttt{SHR Service Requests} within the \texttt{Staff HR Services} folder.
Click on the SHR TA Job Opening Request link.
Job Opening Request

Use this form to request a new job posting.

NOTE: This form will only be used for staff positions (not academics or students).

Please consult the Talent Acquisition team for assistance using this form. Use the Locate Your Team page, or call (831) 459-2009 to find the appropriate help you need.

Before filling out this form, gather the following information:

- Go to Manager Self Service (MSS) and confirm the details about the position(s) you intend to fill:
  - The position is at a status of approved
  - The job description associated with the position is up-to-date
  - Funding is associated with the position
- Names/CruzIDs of all departmental approvers

*** Select the JOB OPENING CONTROL REQUEST... ***

- RECRUITMENT TYPE
- More information

Hiring managers are strongly encouraged to fill positions through competitive recruitment whenever possible. For more information about competitive and non-competitive recruitment types, please click here.

- None -

Required fields have a red asterisk

Some fields have More Information boxes

Select a Recruitment Type

Review general instructions at the top of the form
Job Opening Request – Unit Information

Enter the Hiring Manager

Enter the Supervisor

Enter the Department

- Recruitment Approvers
- Department code
- Division
- Talent Acquisition Consultant

will automatically populate based on the department selected
Job Opening Request – Requestor Information

Text fields with a magnifying glass indicate that you must choose an individual currently in the UCSC system. You can locate the individual by:
- Typing in their name
- Clicking the magnifying glass to search for them

Your name will appear as Requestor.
You can select a different Requestor.

Enter the name of your budget contact.
Job Opening Request – Unit Information

Enter Hiring Committee Members, if known at this time.

You also have the option to notify non-UCSC individuals by listing their name and email.

You have the option to add UCSC employees who you would like to keep updated on this recruitment.
Job Opening Request – Job Opening Information

Select either Standard Requisition or Continuous job Opening

Enter the Job Title as it is shown in the Job Description

Select the Employee Classification

The Worksite Location will default based on the department selected

You can select a different Worksite Location

Select a Status Reason
Job Opening Request – Job Opening Information

Enter a **Position Number** you would like to fill with this recruitment

**Note:** All positions associated with a single recruitment must share the same:
- Job Code
- Department
- Percentage of Time
They must also all be recruited for the same **Employee Classification**

Identify if there are multiple positions to be filled
If **Yes**, two additional fields will appear below:

Enter the **Target Number of Openings**

Enter any additional **Position Numbers** to be filled with this recruitment
Job Opening Request – Job Opening Information

Select a **Job Length**

- **Ends on Specific Date**
- **Ends after Specific Duration**

- If you select **Ends on Specific Date**, a date field will appear.
- If you select **Ends after Specific Duration**, a duration field will appear.

Identify if there is a possibility of extension for this job.

Identify the job as full or part time.

Identify by when you would like the position to be filled.

- **Select date job ends**
  - 06-30-2022

- **Select date job ends**
  - 06-30-2022

- **Job Duration (from date of hire)**
  - 2 years

- **Possibility of Extension**
  - Yes

- **Full/Part Time**
  - Full Time

- **Travel Percentage (anticipated)**
  - Never or Rarely

- **Desired Date for Position to be Filled**
  - Start Date
    - Specific Date
  - Expected Start Date

- If you select **Specific Date**, a date field will appear.

If you select **Specific Date**, a date field will appear.

Identify the percentage of time the selected candidate would be required to travel.
It is not required that you upload supplemental documents

If there is information needed for your job opening for which there is no field in the Job Opening Request, please do so by uploading a supporting document here.

**SUPPORTING DOCUMENTATION INFORMATION**

**INSTRUCTIONS:**
- If there is any supporting documentation that you would like to attach to this request, please do so below.
- Please do not attach Job Descriptions.
- Talent Acquisition will rely on the Job Description for your UCPath position number to create this job opening.
- If any updates to that Job Description are required, please fill out a *Position Control Request* form (Position Request Type = UPDATE Existing Position) to update the Job Description before submitting this Job Opening Request.

**ATTACH SUPPORTING DOCUMENTS**

Click on this paperclip icon to attach documents to this request. Once uploaded just click the "X" in upper right corner to close the popup window.

To see the documents you have already uploaded or to remove or change a document:
- Click on the "Manage Attachments" link at the top of this page to remove or change attachments or...
- Click on the paper clip icon again.
Job Opening Request – Supporting Document Information

A small window will pop-up for you to attach a document.

Click Choose file and select the file you would like to upload.

Wait for the green loading bars to disappear.

Once you see your file name in green, click the X to return to the form.
Job Opening Request – Schedule & Salary Information

Fill out this section with the job schedule and salary information for your job opening.

<table>
<thead>
<tr>
<th>SCHEDULE and SALARY INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SCHEDULE INFORMATION</strong></td>
</tr>
<tr>
<td>✴ Options</td>
</tr>
<tr>
<td>☐ Days</td>
</tr>
<tr>
<td>☐ Evenings</td>
</tr>
<tr>
<td>☐ Nights</td>
</tr>
<tr>
<td>☐ Swing Shift</td>
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<tr>
<td>☐ Weekends</td>
</tr>
<tr>
<td>✴ Number of Days per Week</td>
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<tr>
<td>e.g.: 5</td>
</tr>
<tr>
<td>✴ Average Hours Daily</td>
</tr>
<tr>
<td>e.g.: 8</td>
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<tr>
<td>✴ Average Hours Weekly</td>
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<tr>
<td>e.g.: 40</td>
</tr>
<tr>
<td>✴ FTE (Percentage of Time)</td>
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<tr>
<td>e.g.: 40</td>
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<tr>
<td>✴ Days of the Week</td>
</tr>
<tr>
<td>None --</td>
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<tr>
<td>✴ Shift Differential</td>
</tr>
<tr>
<td>None --</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>SALARY INFORMATION</th>
</tr>
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<tbody>
<tr>
<td>Options</td>
</tr>
<tr>
<td>☐ Minimum Salary</td>
</tr>
<tr>
<td>☐ Min to Mid Range</td>
</tr>
<tr>
<td>☐ Full Salary Range</td>
</tr>
<tr>
<td>☐ Salary by Agreement (BWA only)</td>
</tr>
<tr>
<td>☐ Salary commensurate with skills and qualifications</td>
</tr>
<tr>
<td>☑ Specific Salary Range</td>
</tr>
<tr>
<td>✴ Specific Lower Range Limit $</td>
</tr>
<tr>
<td>✴ Specific Upper Range Limit $</td>
</tr>
</tbody>
</table>

If Specific Salary Range is chosen, then you will be asked to enter the minimum and maximum salary amounts.
Job Opening Request – Job Posting Information

Indicate if the posting will be available to both internal and external applicants or only internal applicants.

The form will request specific dates or time periods after you indicate the opening’s initial review type.

Ends on Specific Date will open a date field.

Ends After Specific Duration will open a duration field.

The Initial Review Period is the number of days or weeks before initial review. The Initial Review Period must be a minimum of two weeks.

E.g.: 30 days or 3 weeks.
Job Opening Request – Supplemental Information

You can enter a department marketing statement

You can identify your department’s URL for applicants

You can add additional information you want applicants to see in the job posting

You may also add supplemental questions for applicants to answer by clicking the green Add button
Job Opening Request – Adding Supplemental Questions

Add in the questions one-by-one, as well as their possible and correct responses (if closed-ended).

Click Add to confirm this supplemental question.
Job Opening Request – Competitive Recruitments

**ADDITIONAL ADVERTISING**

After submitting this request, you will receive an email regarding advertising options available for external recruitments. No action is required at this time, however, if you have inquiries or have already processed a purchase order (PO), you can send a soft copy of the PO, along with your selected sites and pricing to staffads@ucsc.edu.

**ADDITIONAL COMMENTS**

Additional Comments for Talent Acquisition

[Submit SHR Request]

Click Submit SHR Request
For non-recruitments or waivers or recruitment, the Selected Candidate section will be available for data entry.

**SELECTED CANDIDATES**

1. Enter your selected candidate(s) information below by clicking on the green "Add" button.
2. After clicking the green "Add" button, a pop-up window will appear. Please enter your selected candidate’s information and then click the smaller, green "Add" button located at the bottom-right corner of the pop-up window.
3. **FOR NON-RECRUITMENT/WAIVER OF RECRUITMENTS:** When you have entered all available selected candidate information, please click the green "SUBMIT SHR REQUEST" button at the bottom of this page.

<table>
<thead>
<tr>
<th>SHR Candidate List</th>
<th>Add</th>
<th>Remove</th>
<th>Date</th>
<th>SCROLL down for ADD Buttons</th>
<th>Candidate First Name</th>
<th>Candidate Last Name</th>
<th>Candidate Phone Number</th>
<th>Candidate Email</th>
<th>Salary Offer</th>
<th>Pay Frequency</th>
<th>Calculated Salary</th>
<th>Calculated Salary Frequency</th>
<th>Worksite Phone</th>
<th>DPA Explanation</th>
<th>Preferred Hire</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

No data to display
Approve a Job Opening

- When the job opening is ready for department approval, an email is sent to the Recruitment Approver, asking them to:
  - Review the attached job posting preview, and then
  - Either click Approve or Deny in the email request
- If the posting is denied by the Recruitment Approver, it will go back to TA for corrections or updates
- If the posting is approved, TA will post the opening to the Internal & External Candidate Gateways
Internal and External Candidate Gateways

- The Internal & External Candidate Gateways can both be accessed through jobs.ucsc.edu

- The Internal Candidate Gateway can also be accessed through UCPath
Navigate to the Internal Candidate Gateway
Now let’s fast forward in our time machine 2 months...

- The IRD has passed, and the applicants were routed
- You’ve completed your screening steps
- You’ve identified who you want to hire
- You’ve completed your Recruitment Document Suite

Now you’re ready for Talent Acquisition to make an offer. Let’s look at the Job Opening Request (JOR) where you will enter job offer details for your selected candidate.
Selected Candidates

• Remember that the **Job Opening Request** form is used **THROUGHOUT** the entire process

• Let’s take a look at how to enter your selected candidates for Competitive and Non-Competitive Recruitments

• This section of the **Job Opening Request** form replaces the old RMS Job Offer Worksheet (JOW)
Selected Candidates

For non-recruitments and waivers of recruitment this section is available immediately. For competitive recruitments, all required recruitment documents need to be submitted before the Selected Candidate section will be available for data entry.

Click the green **Add** button to begin adding candidates.
Selected Candidates

A pop-up window titled **Add Row** will appear. Enter the selected candidate’s offer information here.

Scroll down and click the **Add** button to finish entering information.
### Selected Candidates

**SELECTED CANDIDATES**

1. Enter your selected candidate(s) information below by clicking on the green "Add" button.
2. After clicking the green "Add" button, a pop-up window will appear. Please enter your selected candidate’s information and then click the smaller, green "Add" button located at the bottom-right corner of the pop-up window.
3. **FOR NON-RECRUITMENT/WAIVER OF RECRUITMENTS:** When you have entered all available selected candidate information, please click the green "SUBMIT SHR REQUEST" button at the bottom of this page.

### SHR Candidate List

<table>
<thead>
<tr>
<th>Actions</th>
<th>Date</th>
<th>SCROLL down for ADD button</th>
<th>Candidate First Name</th>
<th>Candidate Last Name</th>
<th>Candidate Phone Number</th>
<th>Candidate Email</th>
<th>Salary Offer</th>
<th>Pay Frequency</th>
<th>Calculated Salary</th>
<th>Calculated Salary Frequency</th>
<th>Worksite-Phone</th>
<th>BFA Exploratory</th>
</tr>
</thead>
<tbody>
<tr>
<td>🚗</td>
<td>04-29-2020</td>
<td>11:02 AM</td>
<td>Amanda</td>
<td>Bynes</td>
<td>8315055309</td>
<td><a href="mailto:whereamanda@ucsc.edu">whereamanda@ucsc.edu</a></td>
<td>Annual</td>
<td>NaN</td>
<td>Monthly</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Click the green Add button to add more candidates if there will be multiple hires**

**Click the green Submit SHR Request button when finished for non-recruitments and waivers of recruitment**
Selected Candidates: Competitive Recruitments and Non-recruitments w/ multiple hires entered later

For competitive recruitments, click the Update button at the top of the page.
Recruitment Document Suite

- The **Recruitment Document Suite (RDS)** is a Google Drive folder containing a number of resources for the hiring committee designed to plan for and navigate through the screening process.

- All routed applications will be stored in the Recruitment Document Suite.

- The Recruitment Document Suite replaces the:
  - Screening Matrix
  - Applicant Selection Log
  - Candidate Profile

- The use of the Recruitment Document Suite is only for **competitive recruitments**.
Recruitment Document Suite

- Hiring@ucsc.edu manages the shared folder. A link will be provided to you when your job is posted.

- When Talent routes your applications after the Initial Review Date (IRD), the application materials will be available in your folder.

- Most of the documents are **required before** the hiring manager is able to **share** the **selected candidate** information with Talent Acquisition.
0. Recruitment Forms Overview

- This reference document provides a brief overview of each document in the suite and when they are required

- We’ve also provided a list of recruitment documents that the unit will initiate and save to the suite
1. Recruitment Planning Guide

- The Planning Guide includes some questions that should be answered at the beginning stages of the recruitment.

- There is also a checklist to use at each step of the process and an overview of recruitment related notifications in the new process.

- This document is required and must be completed by your unit before a job offer can be submitted.
2. Hiring Committee

- The Hiring Committee document defines the roles of the committee members
- The hiring manager or designee will enter the names and departments of the committee members in this document
- This document is required and must be completed by your unit before a job offer can be submitted
3. Qualification Assessment Plan

- This document will include **all of the qualifications** and SCOEs as indicated in the Job Description.

- You will use this document to specify the importance of each qualification and at which stage you will evaluate applicants against these qualifications.

- This document is required, and must be completed before a job offer can be submitted.

![Qualification Assessment Plan Diagram](image-url)
4. Screening Matrix – All Applicants

- The matrix should be used to record individual committee member input during the applicant screening process.

- Each committee member will have their own tab to evaluate applicants. The results of the evaluations will auto-populate in the Evaluation Summary tab.

- This document is required, and must be completed before a job offer can be submitted.
5. Screening Matrix – Continuing Applicants (Optional)

- Should you choose to screen applications in multiple rounds, there is an additional matrix that you will want to use.

- The use of this document is optional. If used, it must be completed before the job offer can be submitted.

You or a designee will populate the list of applicants continuing to this stage of screening.

![Screening Matrix](image)
6. Screening Matrix – Interviewed Candidates

This document helps the hiring committee screen those candidates selected for an interview. This document is required, and must be completed before a job offer can be submitted.

You or a designee will populate the list of applicants continuing to this stage of screening.
7. Reference Check Form

- This document provides guidance in developing a **standard set** of reference check protocol and questions.

- You or a designee should review the Reference Check Form to identify job-related questions to establish the candidate’s prior duties, the quality of their past performance and what strengths or weaknesses can be identified.

- **Best practice is to conduct 2 - 3 reference checks for your selected candidate(s).**
8. Applicant and Candidate Disposition Log

- This document is used to record the justification for the candidate that you’d like to hire.
- This document is also used to record the final evaluation for each routed applicant, including interviewed candidates.
- This document is required, and must be completed before a job offer can be submitted.
Coming Soon!

For guidance on interfacing with the recruitment documents, check out our RDS video library

Click on the binoculars to view our sample Recruitment Document Suite
Recruitment Materials Completed

When you’ve completed all required recruitment documents, add a comment to the Job Opening Request to alert Talent.

"Hi, our RDS documents are COMPLETE and I’m ready to hire someone as amazing as me. Please review and open the candidate field."
Recruitment Materials Completed

• After Talent has confirmed the documents are complete, you will receive notification that the **Selected Candidate** fields in the Job Opening Request are available for your entry.

• Once you have entered the candidate information, Talent will:
  – Review the job offer details
  – Ask your department’s Recruitment Approver to approve the details of the offer

• Once the RA approves the job offer details, Talent will extend the job offer to the selected candidate(s)
Putting It All Together

- Hiring managers will initiate a recruitment by submitting a Job Opening Request form in IT Request.
- The unit’s Recruitment Approver will approve the job posting and job offer in the Job Opening Request form.
- After the Initial Review Date passes, Talent will route all applications to the hiring manager via the Recruitment Document Suite.
- The Recruitment Document Suite documents should be reviewed and completed throughout the recruitment process.
- For competitive recruitments, hiring managers will enter the candidate information once all required documents have been confirmed complete.
- For non-recruitments or waivers, candidate information will be entered by hiring managers in the initial form submission.
Please share your thoughts via the survey linked below or via email.

Link to Recruitment Training Evaluation

We are available to help with future questions @ hiring@ucsc.edu