Search Committee Chair and Staff Editor Instruction Guide

v. 8/2015

Table of Contents

Getting Started

- Logging in to AP Recruit..... 1
- Search Committee Chair and Staff Editor Functionality Overview..... 1

Upload Advertisements

- Upload copies of ALL advertisements into AP Recruit..... 2

View Applicant List

- Find your list of applicants..... 4

Reviewing Applications in AP Recruit

- Review individual applications..... 5
- Download a "PDF Bundle" of the applicant's information..... 6
- Add a personal note (make a notation to yourself regarding the application)..... 6
- Mark an applicant as "Read"..... 7

Managing References in AP Recruit

- Solicit reference letters..... 8
- Upload reference letters..... 10

Managing Applicants in AP Recruit

- Indicate if the applicant has met basic qualifications..... 11
- Update an applicant's status..... 12
- Assign Disposition Reasons for Applicants Marked as "Meet Basic Qualifications"..... 14
- Assign Disposition Reasons for Applicants Marked as "Does Not Meet Basic Qualifications"..... 15

Filtering the Applicant List

- Filter applicants by qualification requirement..... 17
- Filter applicants by status..... 17
- Filter applicants by dates..... 18
- Display applicant data by specifying column criteria..... 18

Adding an Applicant in AP Recruit

- Add an applicant to your recruitment..... 20
- Upload documents..... 21
- Add reference contact information..... 23
- Upload reference letters..... 24
- Activate the applicant that you've created an application for..... 25
- Manage the applicant that you've created an application for..... 27

Other Optional Features

- "Visit/Seminar" feature..... 28
- Hide an applicant from the view of the committee members..... 31
- Unhide an applicant from the view of the committee members..... 31
- View the basic qualifications status of each applicant..... 32
- View the "Application Log"..... 33

Getting Started

Logging in to AP Recruit:

- Using any web browser, navigate to https://aprecruit.ucsf.edu
- Select "UC San Francisco Faculty & Administrators"
- Enter your MyAccess login and password
    - If you forgot your password you can reset here: https://myaccess.ucsf.edu/myaccount/forgotPassword
    - If you forgot your username you can reset here: https://myaccess.ucsf.edu/myaccount/forgotID
    - Or Contact IT help desk for assistance at itservicedesk@ucsf.edu or (415) 514-4100

Search Committee Chair and Staff Editor* Functionality Overview

- *The Search Committee Chair and the Staff Editor can view the following pages:*
    - Home page:
        - UCSF AP Recruit news and updates
        - Contact information for comments, questions, or concerns
    - Recruitments page:
        - Lists all recruitments that you have been assigned to; each recruitment has a "Applicants" link that takes you to the applicant page
    - Help page:
        - Basic instruction for specific actions
        - FAQ
- The Search Committee Chair and the Staff Editor will not be able to make any changes to recruitment details
    - Consult with a VPAA specialist if you think you need to make changes to a recruitment

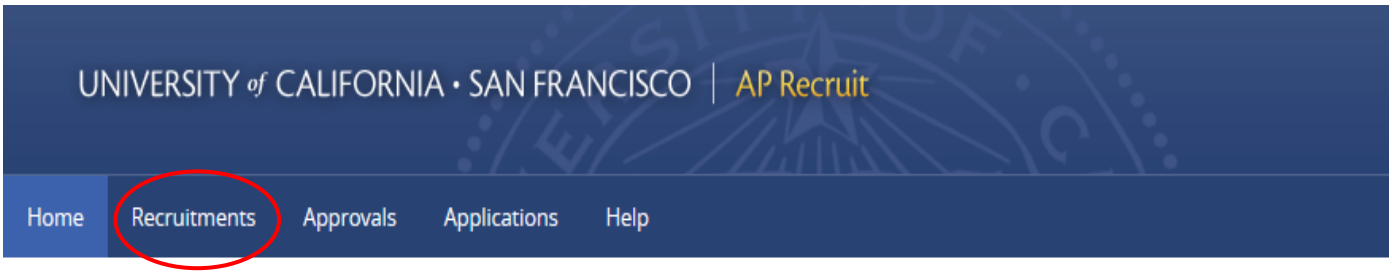
The "Staff Editor" is the person from the department responsible for supporting the search committee.

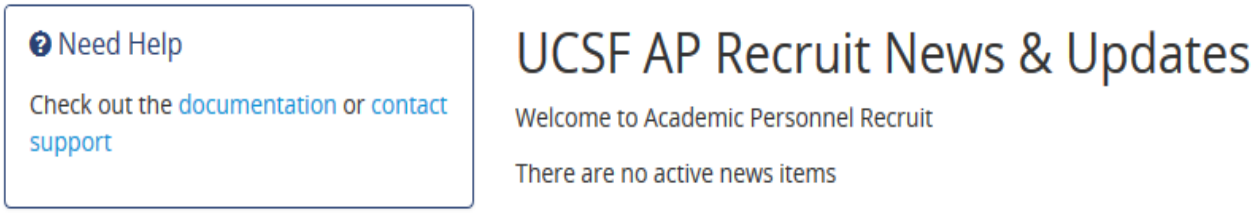
PLEASE NOTE: Search committee members are assigned the "Reviewer" role. They will be able to view the same pages as the Search Committee Chair and Staff Editor however, they will not be able to manage applicants.

Upload Advertisement(s)

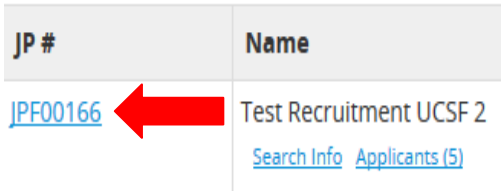
Upload copies of ALL advertisements into AP Recruit:

- Select the recruitments tab

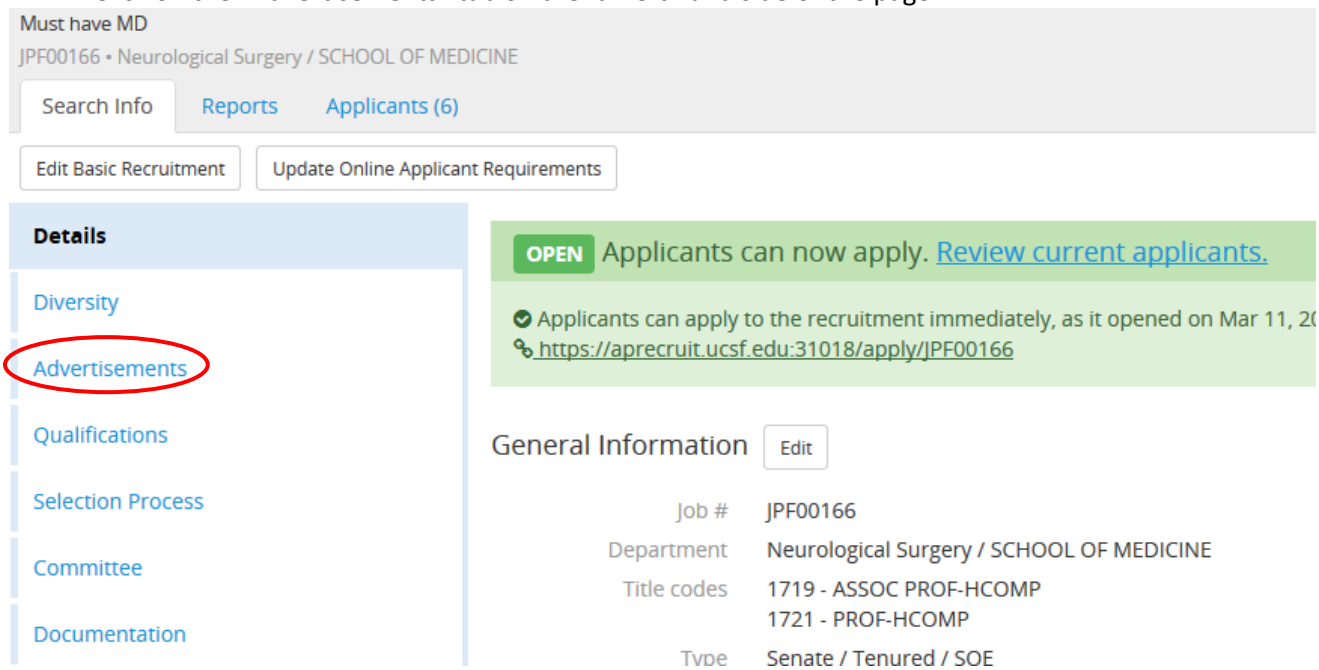




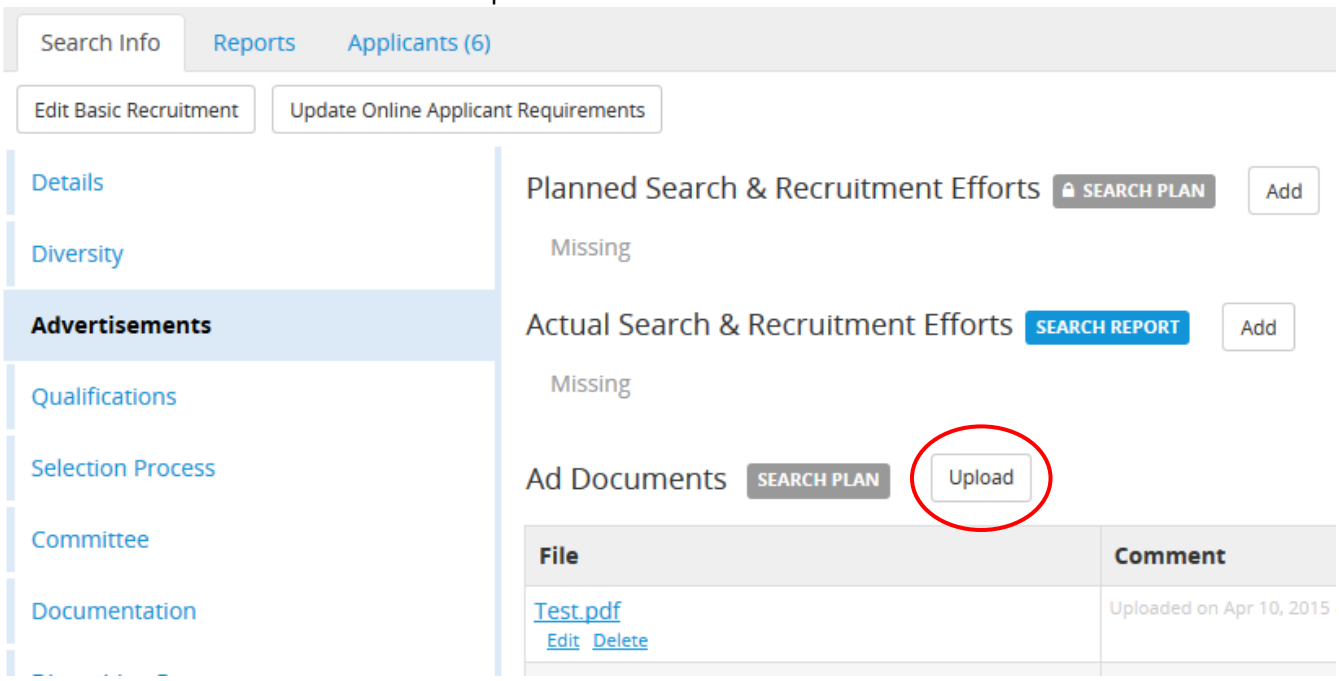
- Click on the "Job Number" (JPF #) you want to upload advertisements to



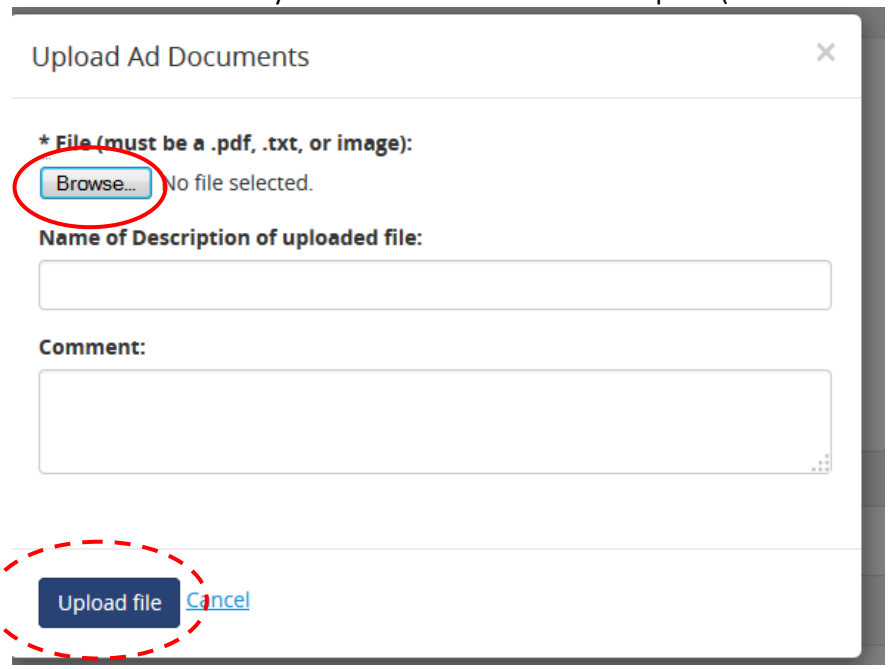
- Click on the "Advertisements" tab on the far left hand side of the page



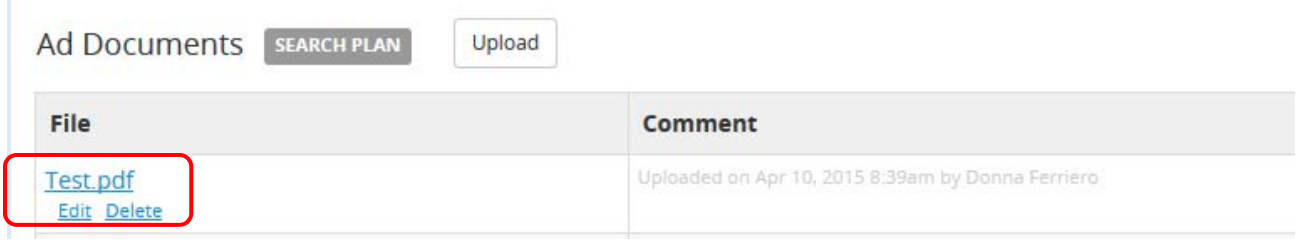
- Under “Ad Documents” click on “Upload”



- Click “Browse” then find your advertisement and click “Open” (ad must be in PDF format)



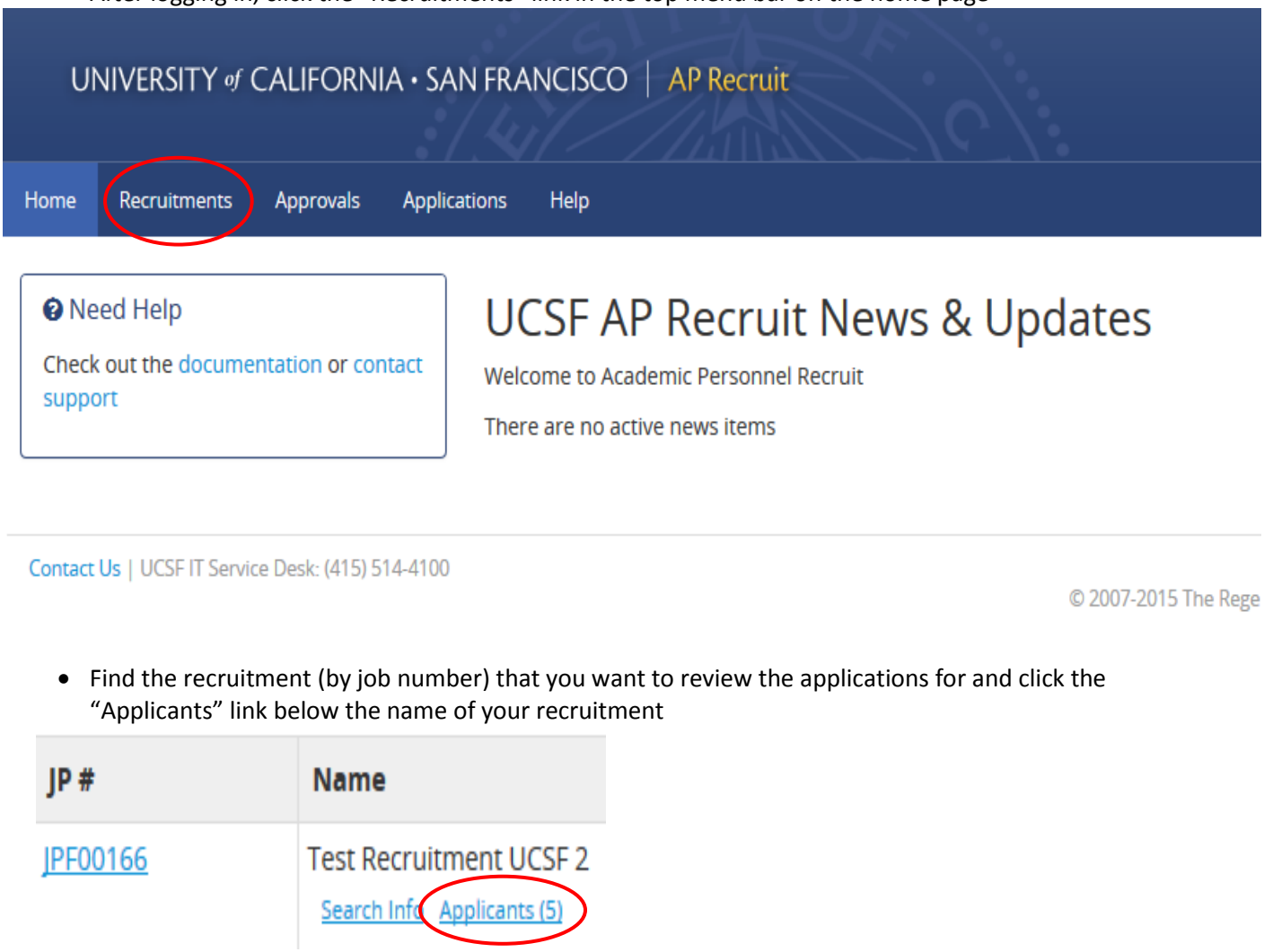
- Click “Upload” file
- Your advertisement should appear under Ad Documents



View Applicant List

Find your list of applicants:

- After logging in, click the “Recruitments” link in the top menu bar on the home page

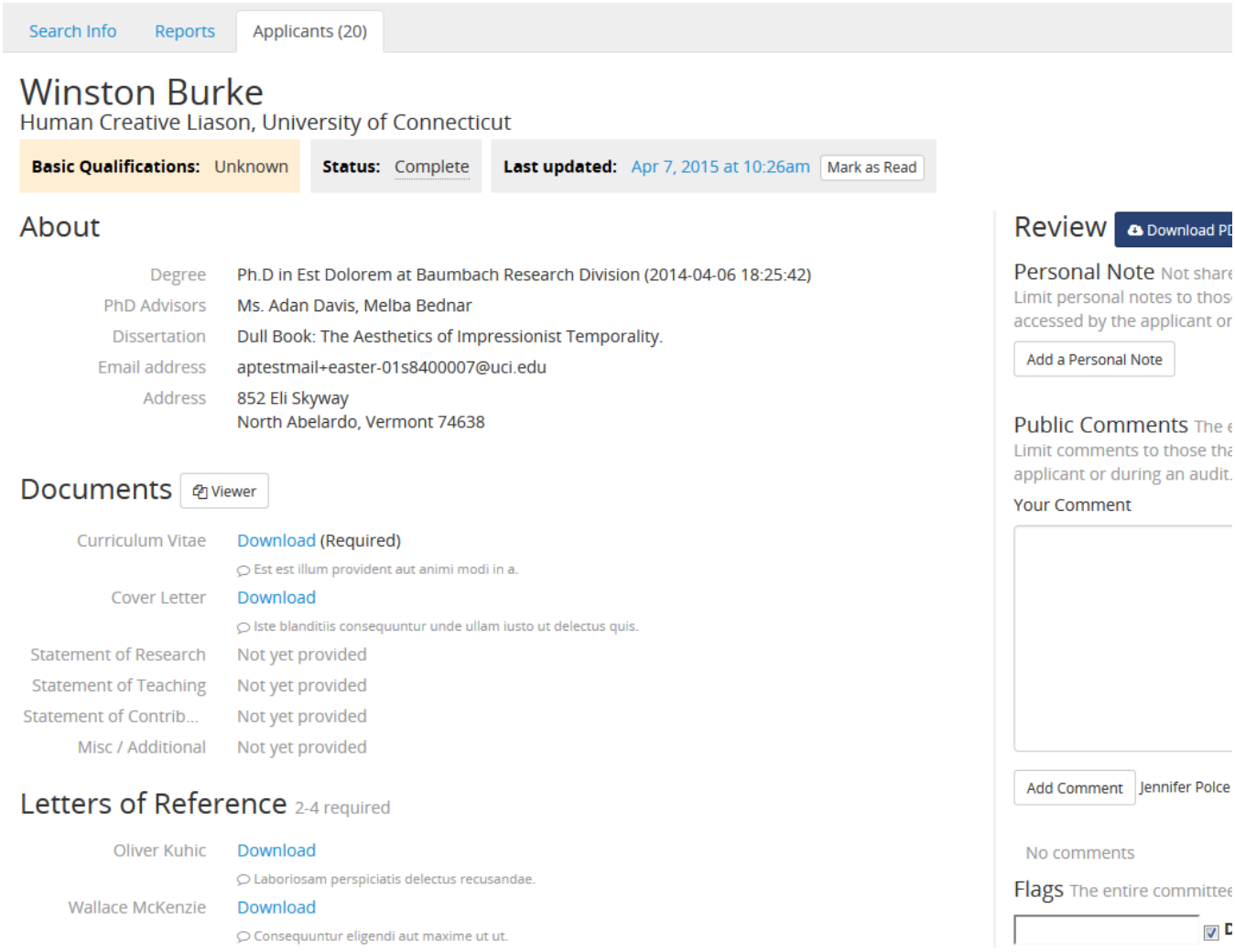


- Find the recruitment (by job number) that you want to review the applications for and click the “Applicants” link below the name of your recruitment

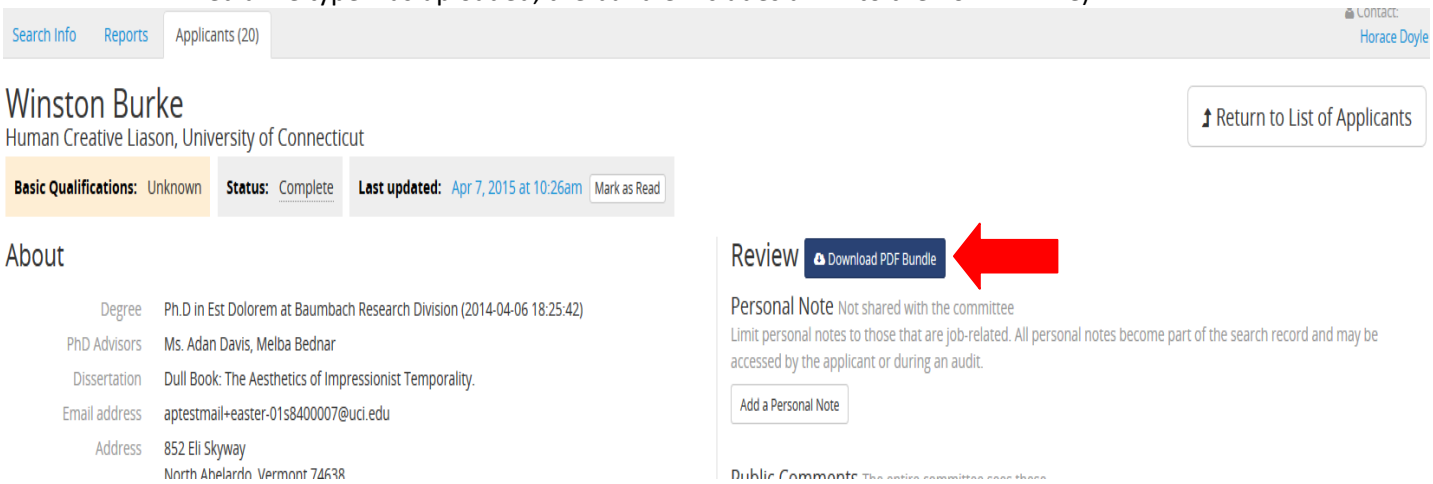
Reviewing Applications in AP Recruit

Review individual applications:

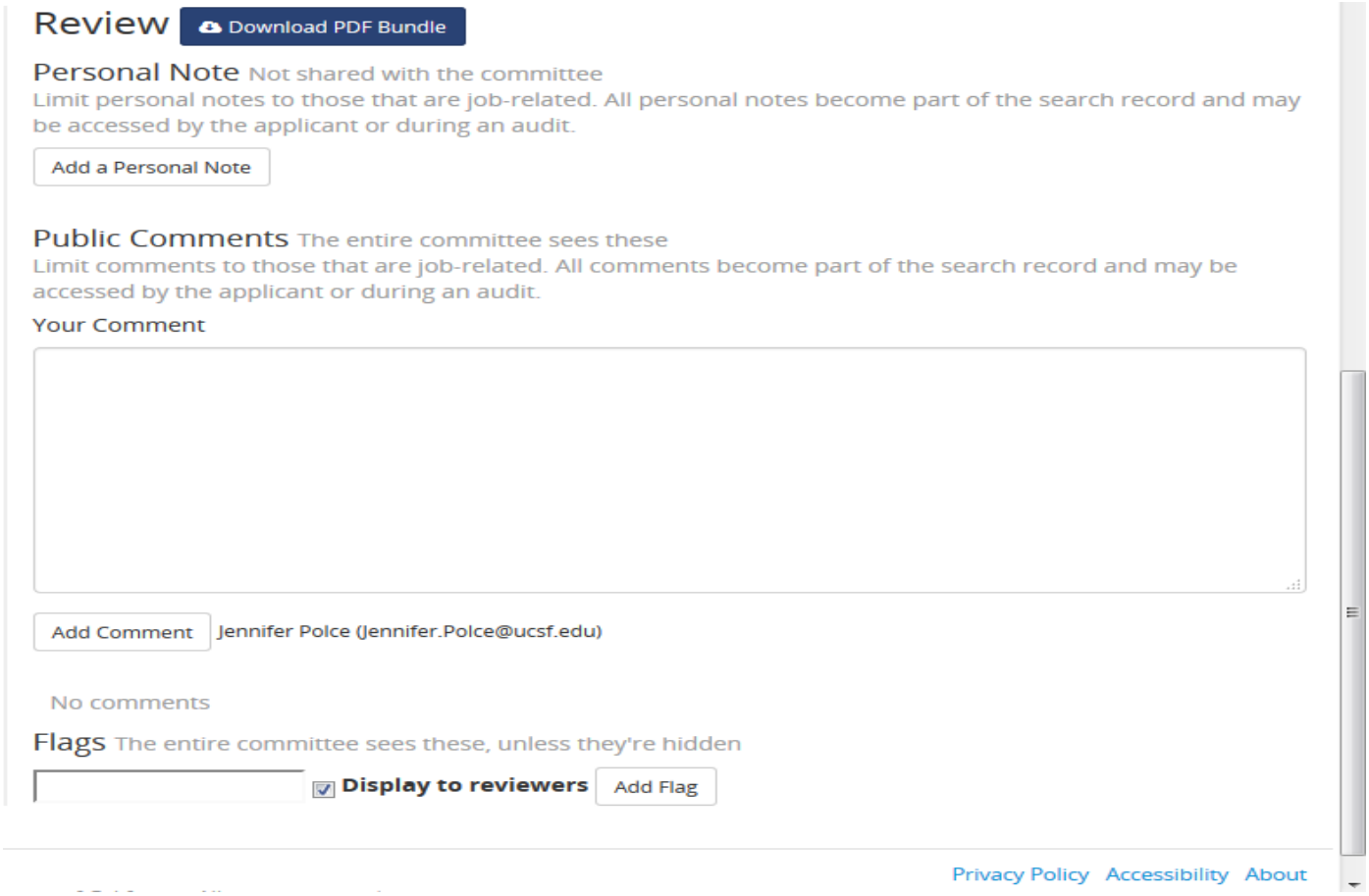
- Click on the applicant's name that you wish to view his or her application
- After you click on the applicant's name, you will be brought to his or her application page which includes:
  - Applicant's Status
  - Read/Not Read
  - Whether they've met "Basic Qualifications"
  - Degrees
  - Email address
  - Postal address
  - Documents submitted (e.g. CV, Cover letter, etc)
  - Letters of Reference received



- **Download a "PDF Bundle" of the applicant's information**
  - Click the "Download PDF Bundle" near the top right of the person's application page (Note that if a media file type was uploaded, the bundle includes a link to the non-PDF file)

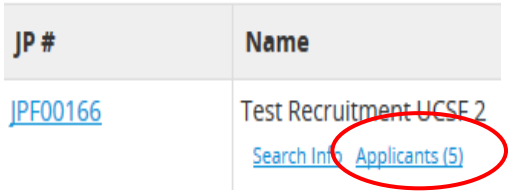


- **Add a personal note, comment, or flag (make a notation to yourself regarding the application)**
  - Add a personal note that will not be displayed to the committee members
  - Add a comment that will be displayed to the committee member
  - Add a flag (short phrase or word) that will be displayed to the committee members

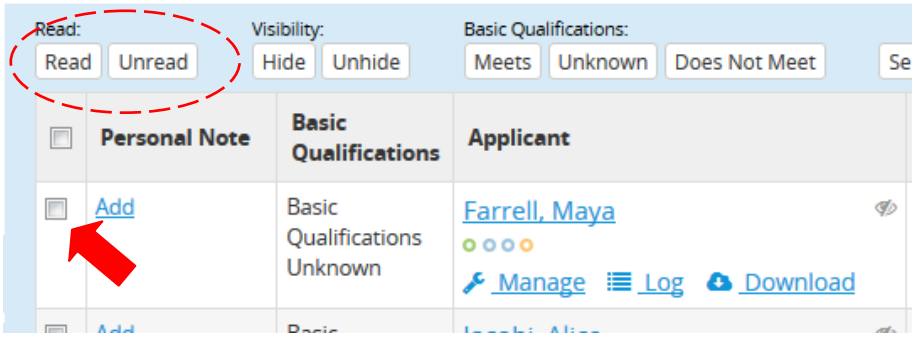


PLEASE NOTE: Personal notes, comments, and flags will not be displayed to the committee members however ALL personal notes are saved as part of the final electronic file which is discoverable.

- **Mark an applicant as "Read"**
  - Find the recruitment (by job number) and click the "Applicants" link below the name of your recruitment to see all the applicants



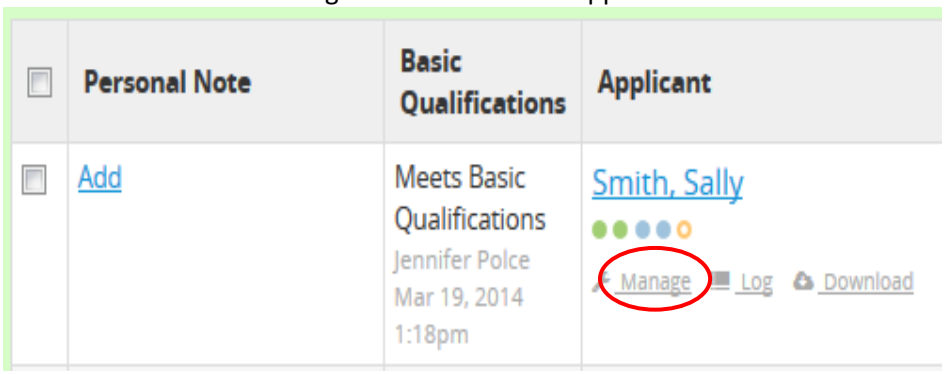
  - Put a check in the empty box in the applicant's row



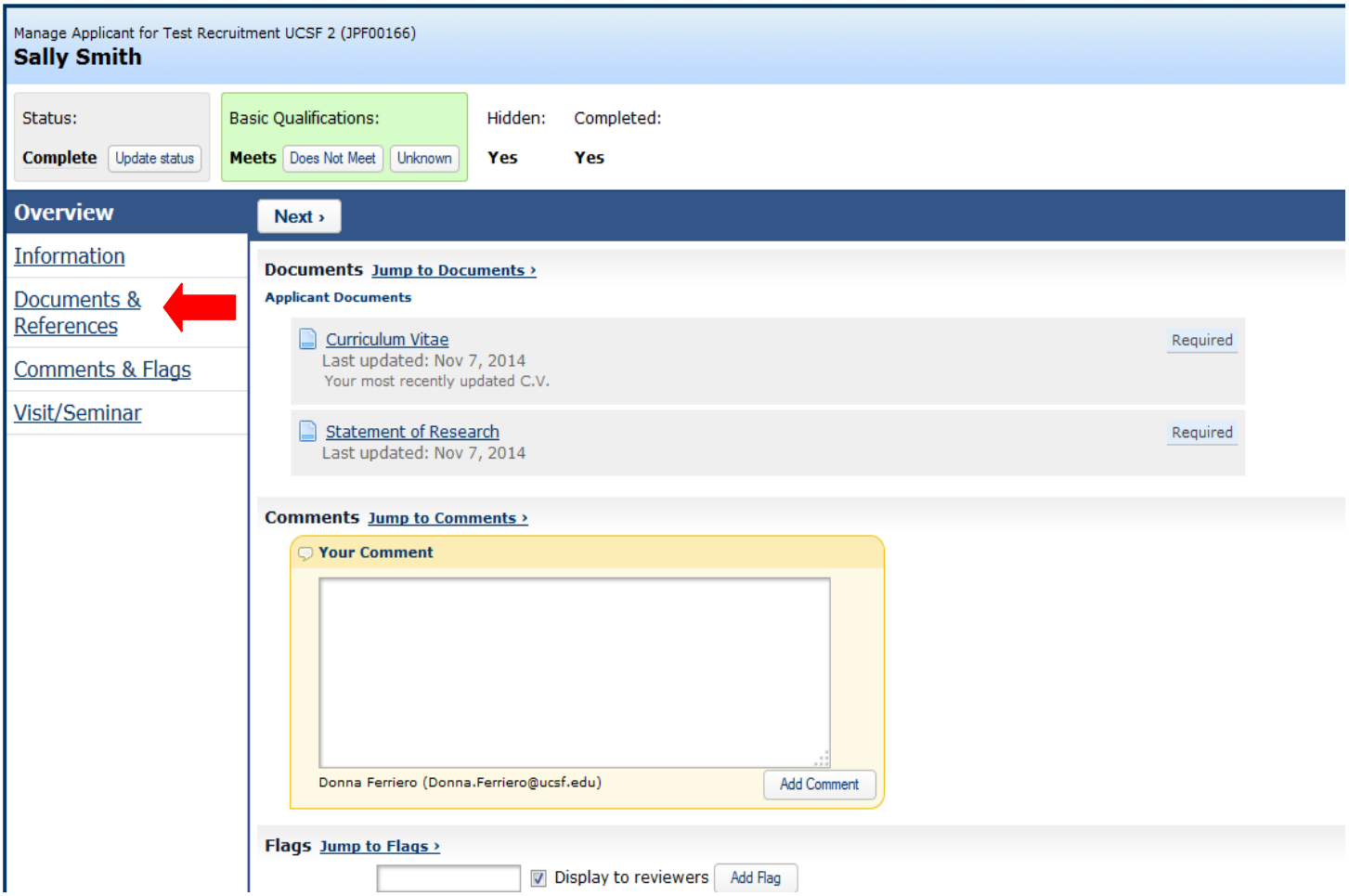
  - Click the button "Read" above Personal Note (A dark green checkmark will appear below the check box)
  - If an application has been modified since you marked it as read, an alert icon will replace the green checkmark to cue you

Managing References in AP Recruit

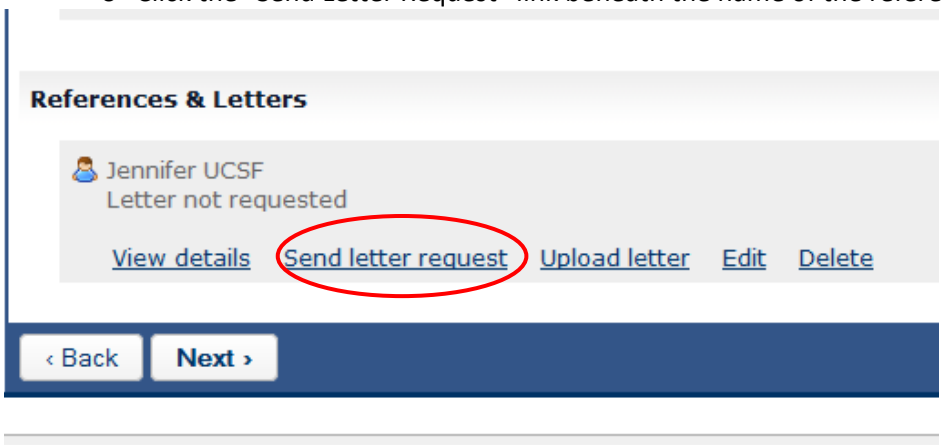
- **Solicit reference letters**
  - Click the "Manage" link beneath the applicant's name



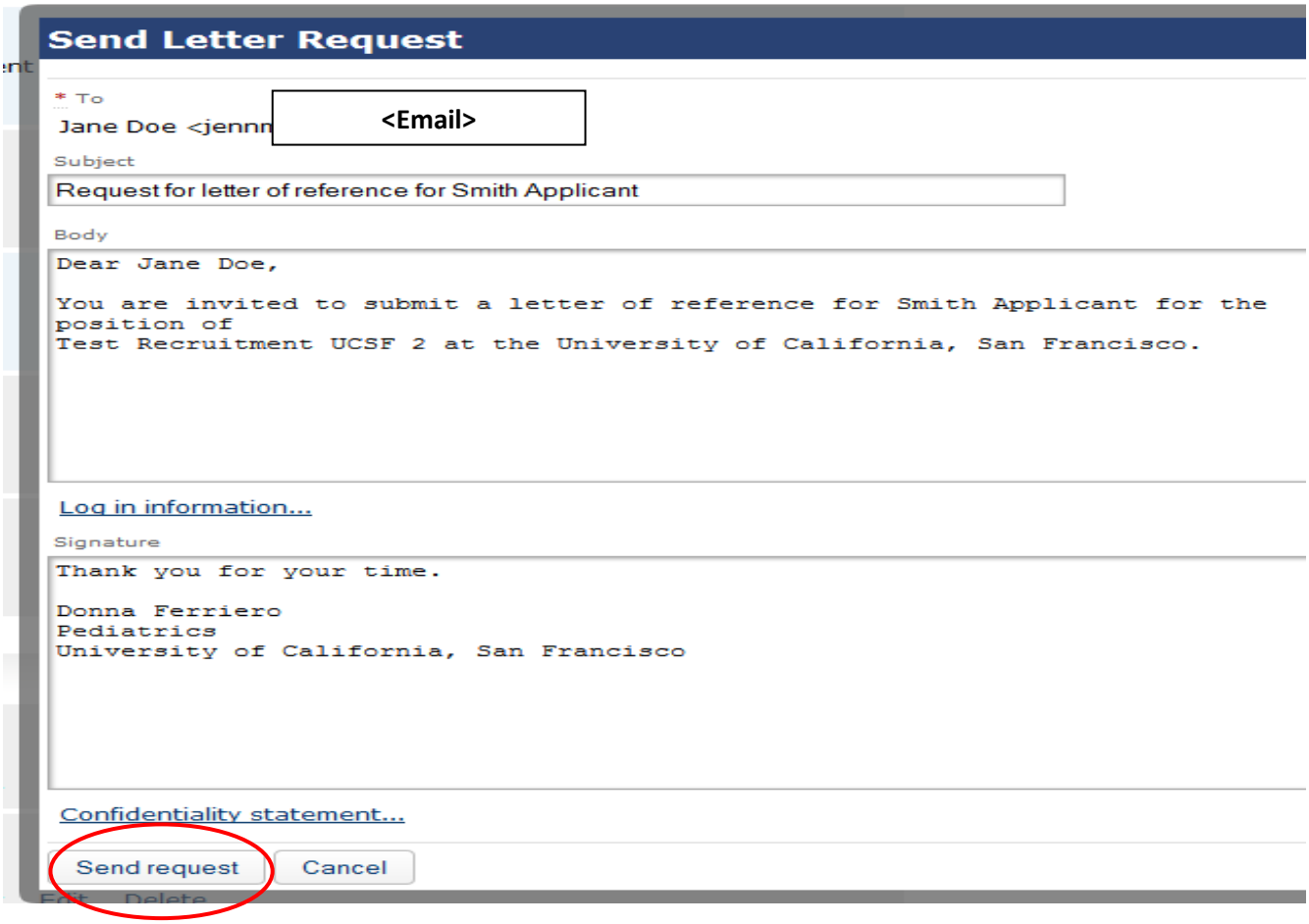
  - Click the "Documents and References" link on the left hand side of the page



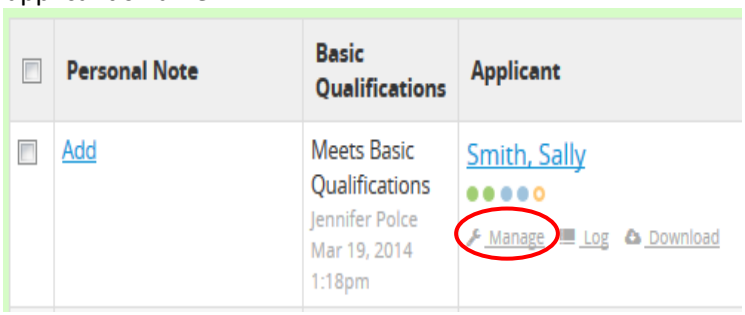
- Find the list of references toward the bottom of the page, under “References & Letters”
- Click the “Send Letter Request” link beneath the name of the reference you wish to solicit



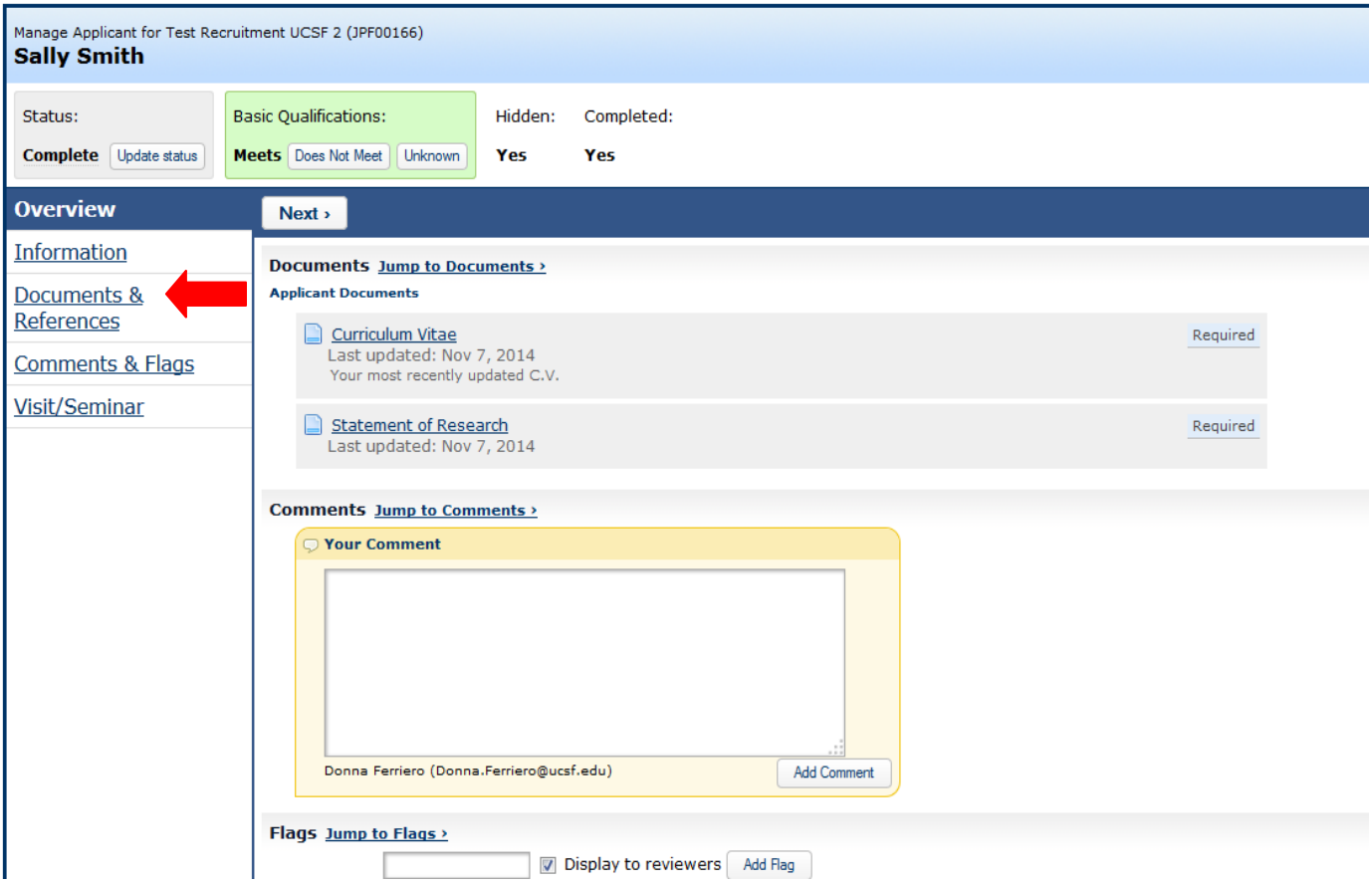
- A pop up window will appear displaying the language of the email that will be sent to the referees; click the “Send Request” button



- **Upload reference letters**
  - Find the applicant you want to upload reference letters to and click the “Manage” link beneath the applicant’s name



  - Click the “Documents and References” link on the left hand side of the page

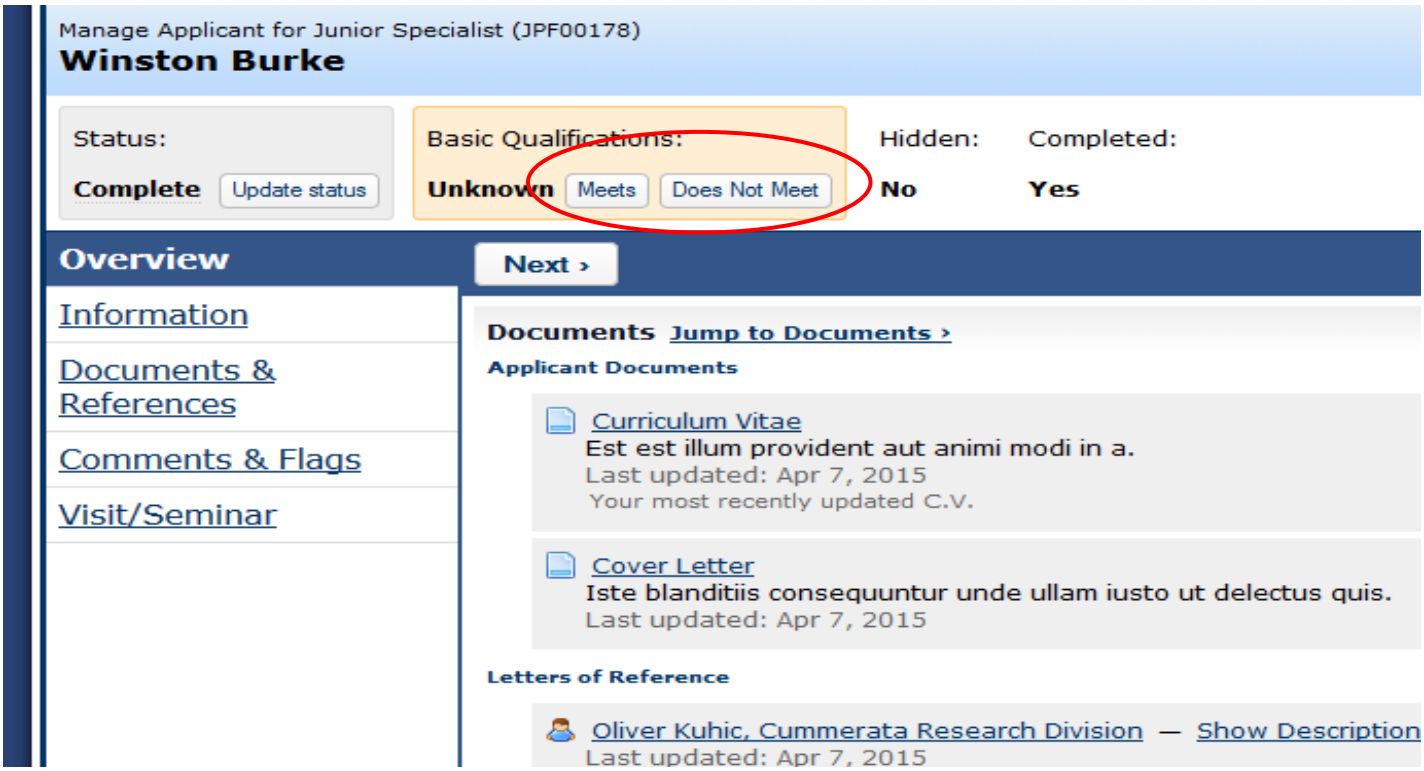


  - Find the list of references toward the bottom of the page, under “References & Letters”
  - Click the “Upload Letter” link beneath the name of the reference you wish to upload a letter for

Managing Applicants in AP Recruit

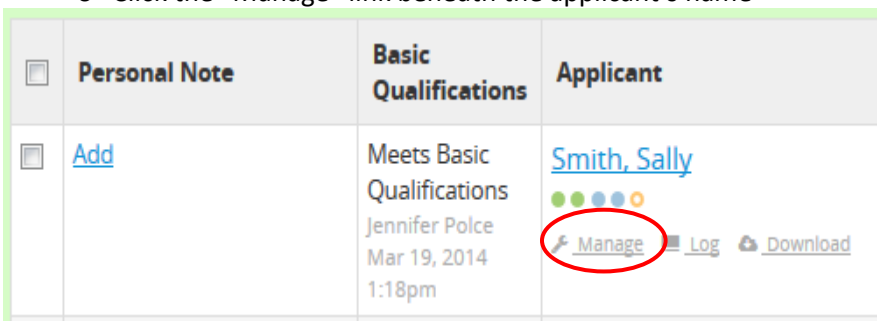
- **Indicate if the applicant has met basic qualifications**
  - Find the applicant you want to review and click the "Manage" link beneath the applicant's name

  - There are three selections for "Basic Qualifications", click one of the following 3 buttons:
    - Meets (applicant has met the basic qualifications)
    - Does Not Meet (applicant has not met the basic qualifications)
    - Unknown (this status will automatically appear if you have not selected one of the other two)

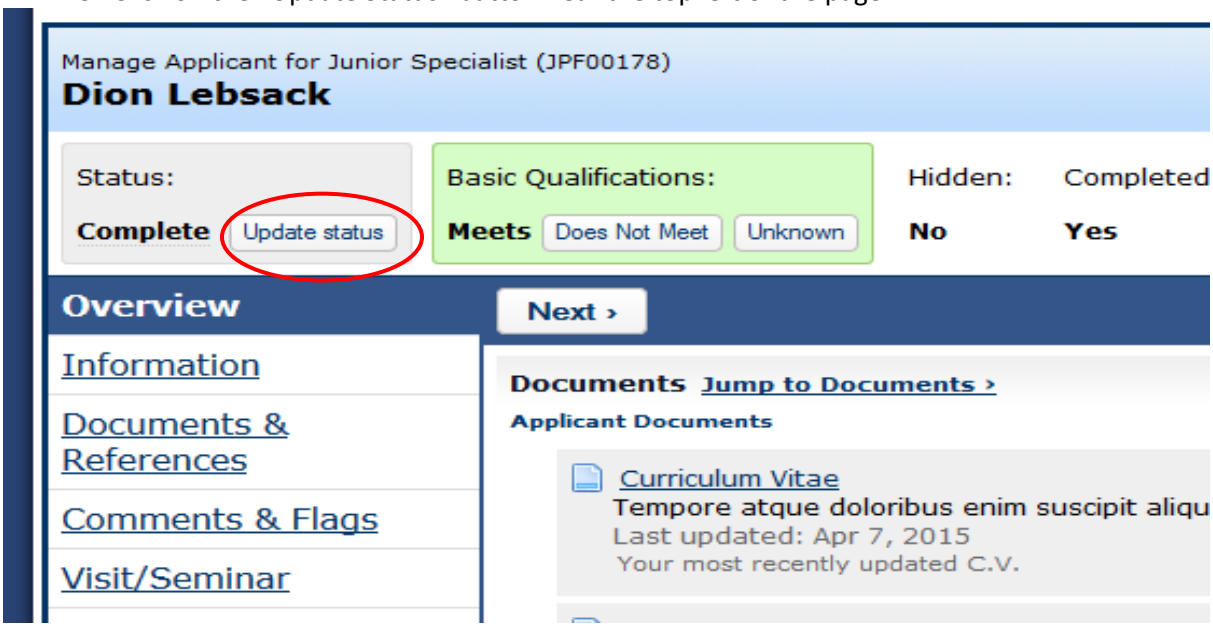


PLEASE NOTE: An applicant's status must be "Complete" in order for you to indicate whether he/she has met basic qualifications. Applicants that have completed the application requirements will be automatically set to "Complete." To manually update an applicant's status to "Complete" see instructions below.

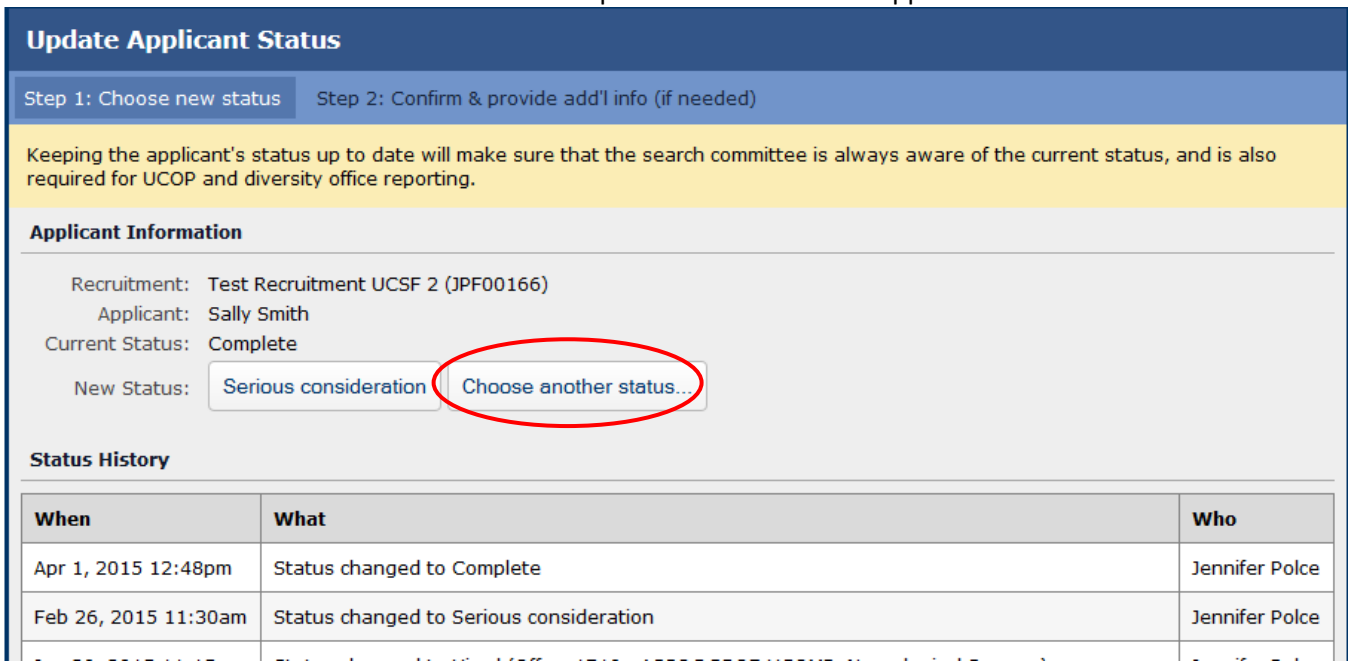
- **Update an applicant's status**
  - Click the "Manage" link beneath the applicant's name



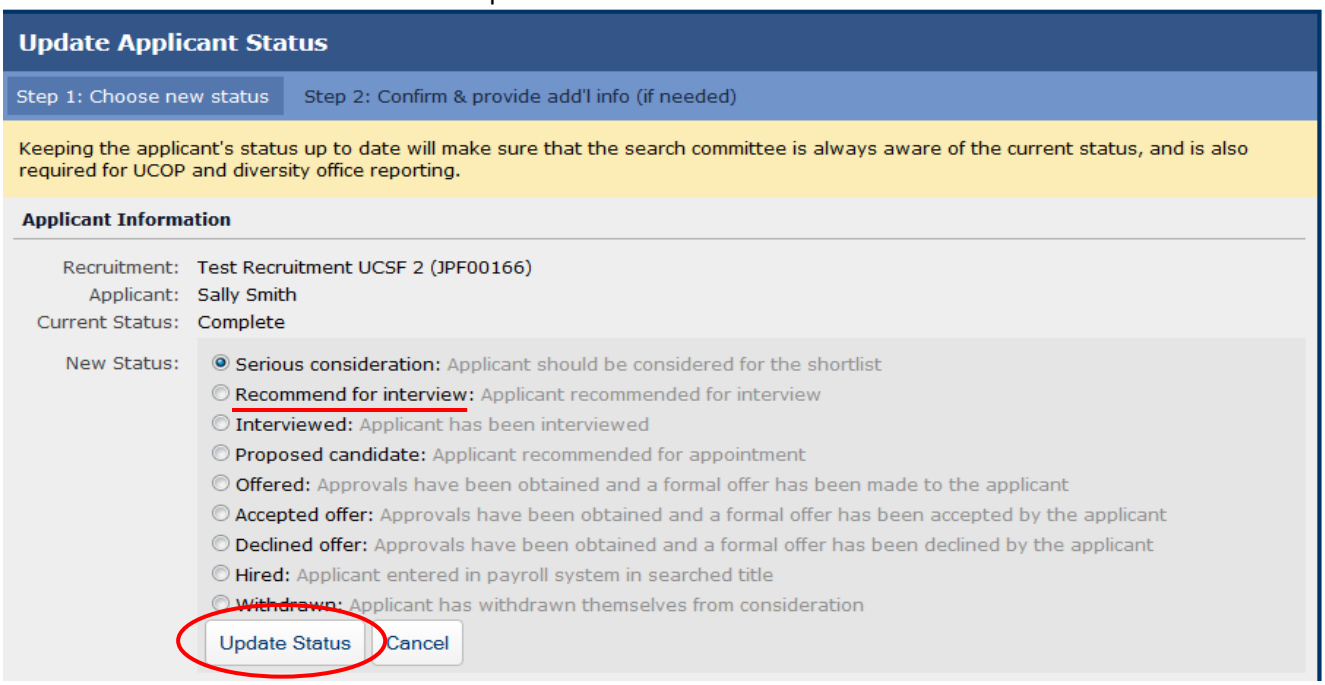
  - Click on the "Update Status" button near the top left of the page.



  - Click on "Choose Another Status" to update the status of the application



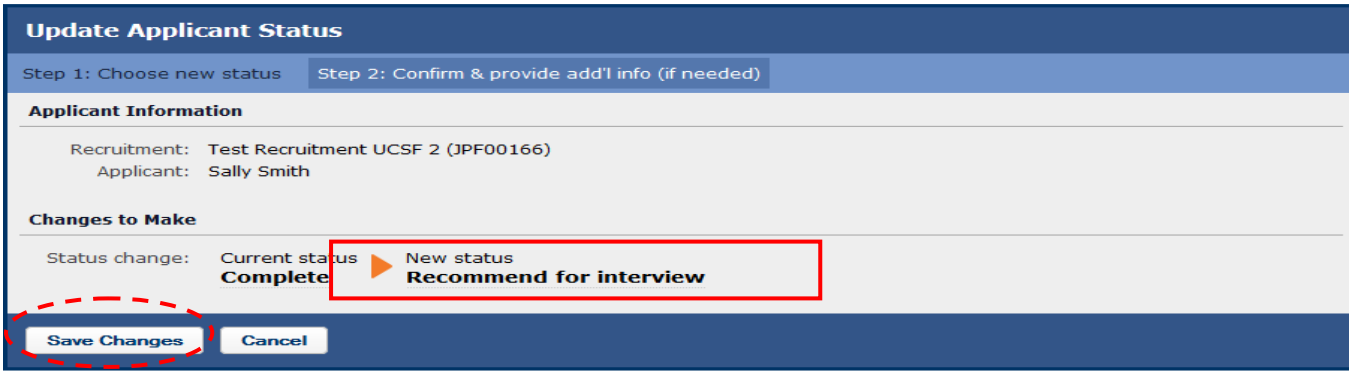
- Select a new status and click “Update Status”



- List of all statuses + definitions:

Status	Definition
Incomplete	Application is incomplete
Withdrawn	Applicant has withdrawn themselves from consideration
Complete	Required documentation has been submitted (or analyst has manually completed the applicant)
Serious consideration	Applicant should be considered for the shortlist
Recommend for interview	Applicant has been recommended for an interview
Interviewed	Applicant has been interviewed
Proposed Candidate	Applicant recommended for appointment
Offered	Approvals have been obtained and a formal offer has been made to the applicant
Accepted offer	Approvals have been obtained and a formal offer has been accepted by the applicant
Declined offer	Approvals have been obtained and a formal offer has been declined by the applicant
Hired	Applicants has entered into the payroll system in searched title

- Click “**Save Changes**”



PLEASE NOTE: Prior to closing your search and/or identifying your final candidate(s), all applicants that have applied up to your review date MUST have disposition reasons assigned to them.

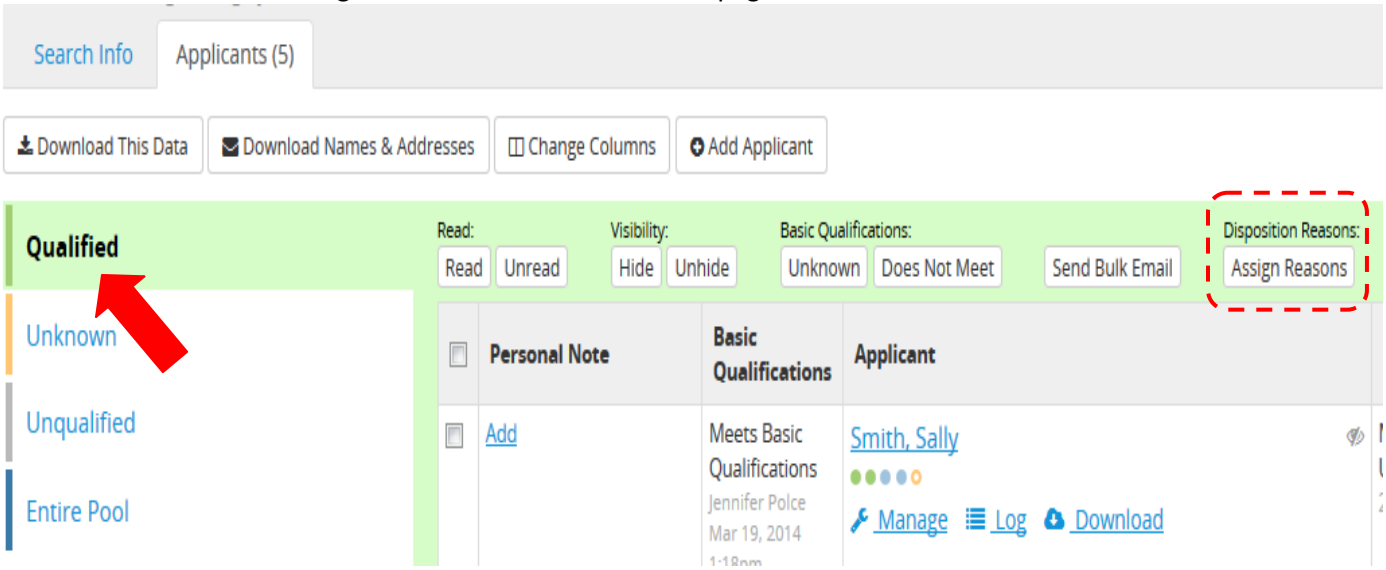
- **For FACULTY recruitments only:**
  - **If you are approaching your 1st round of interviews: Contact Academic Affairs BEFORE you begin the interview process, to request review and approval of your applicant pool by Office of Diversity and Outreach**

  - **For each subsequent round of interviews in which you have changed your application review date: Contact Academic Affairs at any point BEFORE you identify your final candidate, to request review and approval of your applicant pool by Office of Diversity and Outreach***

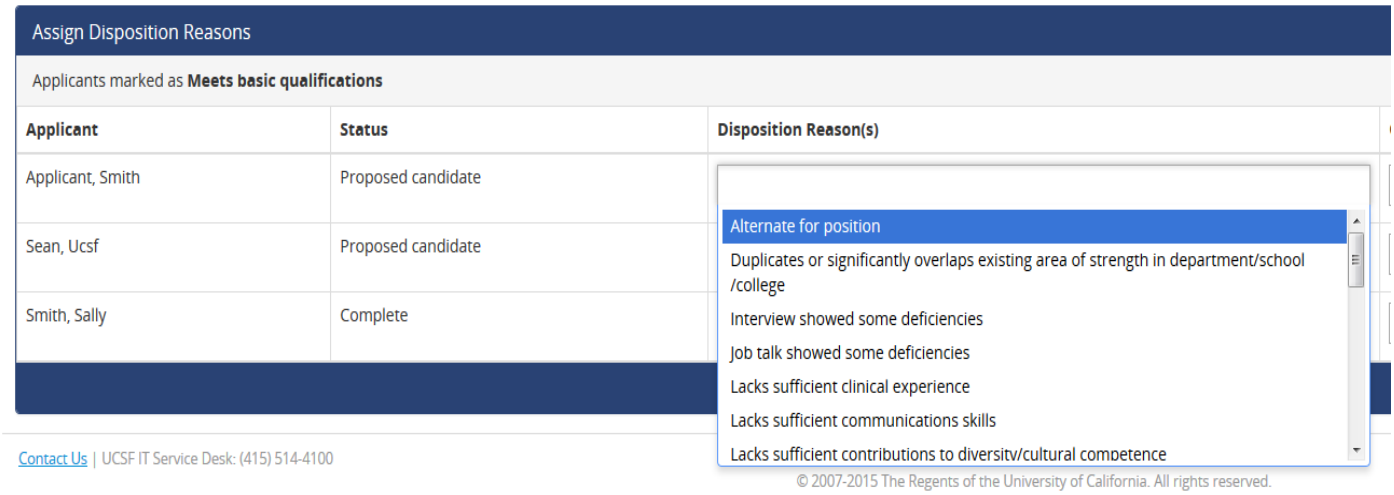
  - **Applicant pool review and approval is not required for hires that are a result of a change in series.**

  ***If you do not change your application review date and there have been no changes to your pool since your 1st round of interviews, then additional applicant pool review and approval is not required.**

- **Assign Disposition Reasons For Applicants Marked as "Meets Basic Qualifications"**
  - Click on the "Qualified" tab on the left hand side of the applicant list page (list of qualified applicants will appear)
  - Click "Assign Reasons" near middle of the page.



  - Click the empty box under "Disposition Reasons" to access dropdown menu

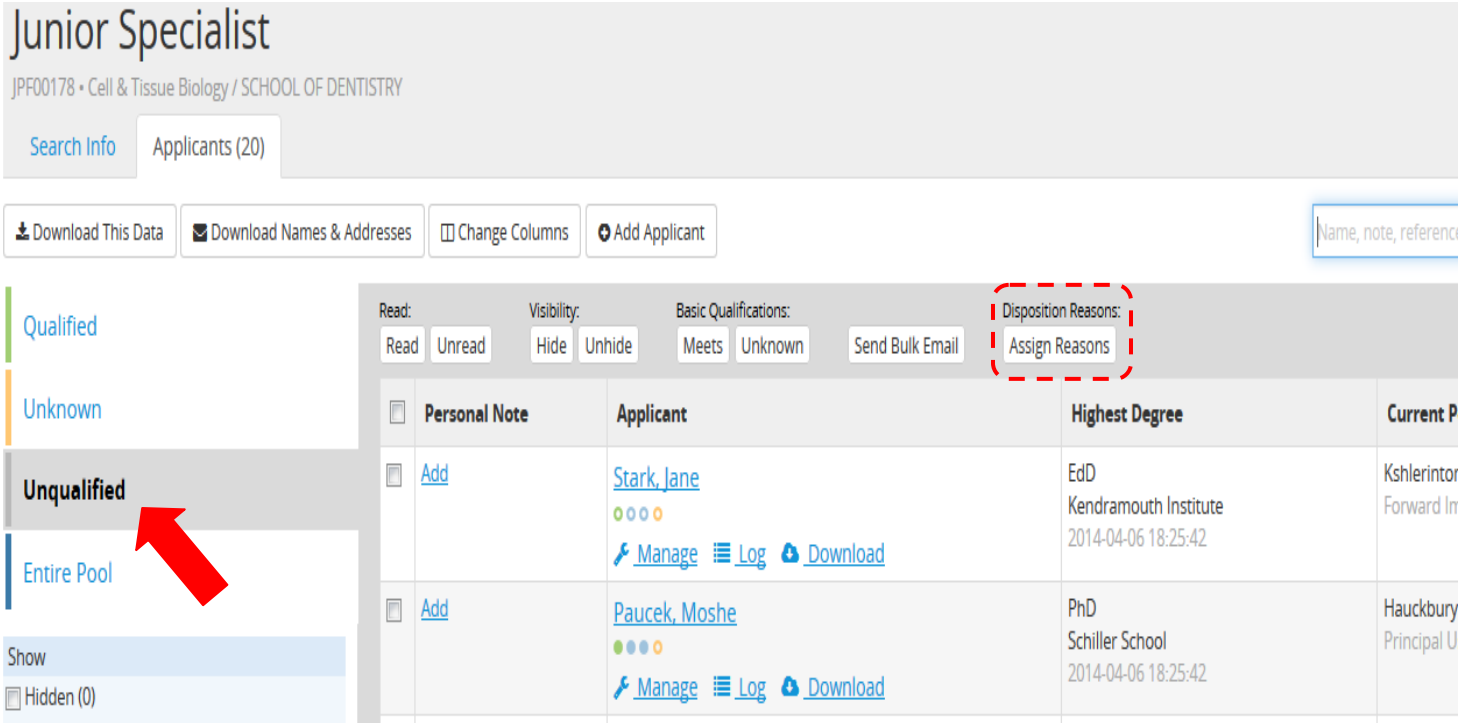


  - Select a disposition reason (If other, use comment box to provide reason)

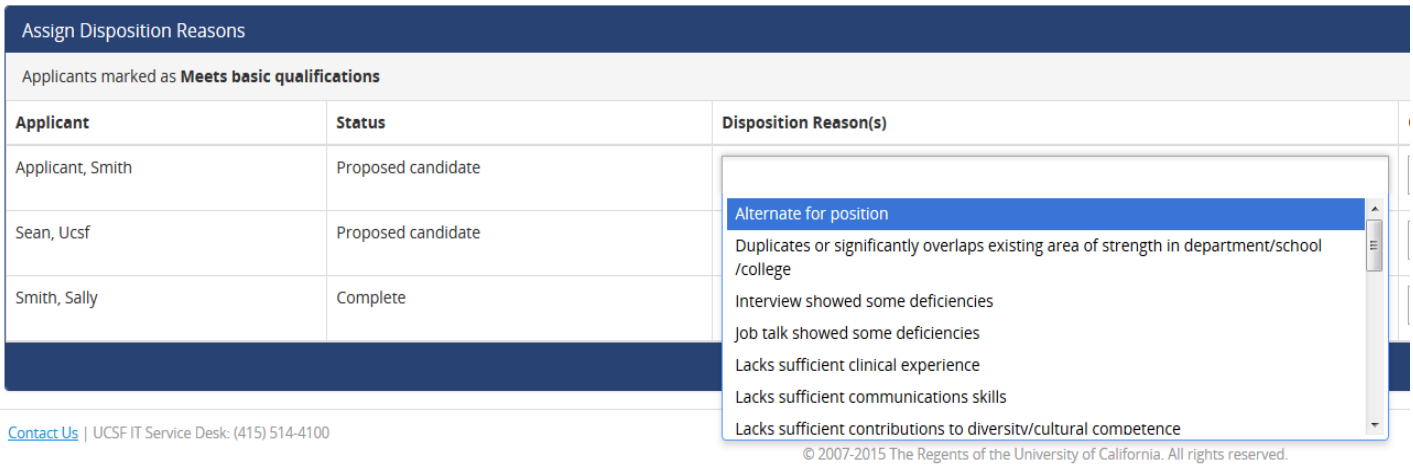
- Click “Done” towards the right hand side of the page
- List of disposition reasons for applicants marked as “Meets Basic Qualifications”

Disposition Reason(s)
Alternate for position
Duplicates or significantly overlaps existing area of strength in department/school/college
Interview showed some deficiencies
Lacks sufficient clinical experience
Lacks sufficient communication skills
Lacks sufficient contributions to diversity/cultural competence
Lacks sufficient depth/breadth of research/creative excellence or impact
Lacks sufficient leadership experience for position
Lacks sufficient potential for successful attraction, advising, and mentoring of students/trainees/postdocs
Lacks sufficient research achievement/potential
Lacks sufficient teaching achievement/potential
Job talk showed some deficiencies
Other, please specify
Overall record not as strong as other candidates
Publication record shows some deficiencies
References were weak
Specialization or area of expertise for position or department needs shows some deficiencies

- **Assign Disposition Reasons For Applicants Marked as “Does not Meet Basic Qualifications”**
  - Click on the “Unqualified” tab on the left hand side of the applicant list page. List of unqualified applicants will appear.
  - Click “Assign Reasons” near middle of the page



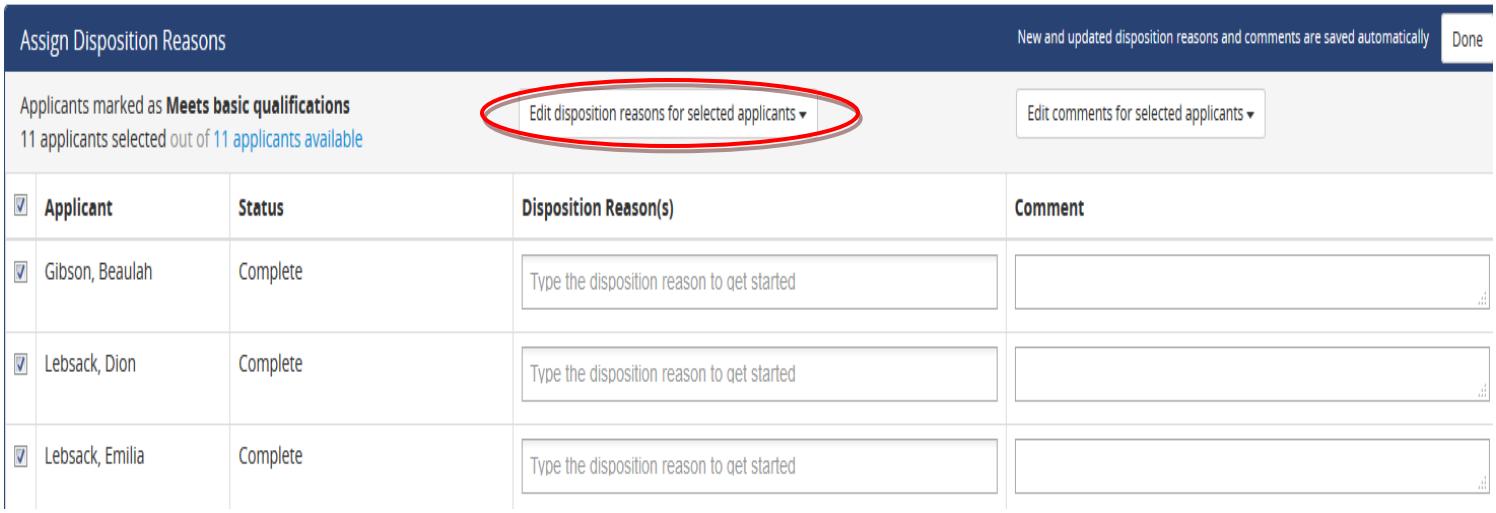
- Click the empty box under “Disposition Reasons” to access dropdown menu



- Select a disposition reason (If other, use comment box to provide reason)
- Click “Done” towards the right hand side of the page

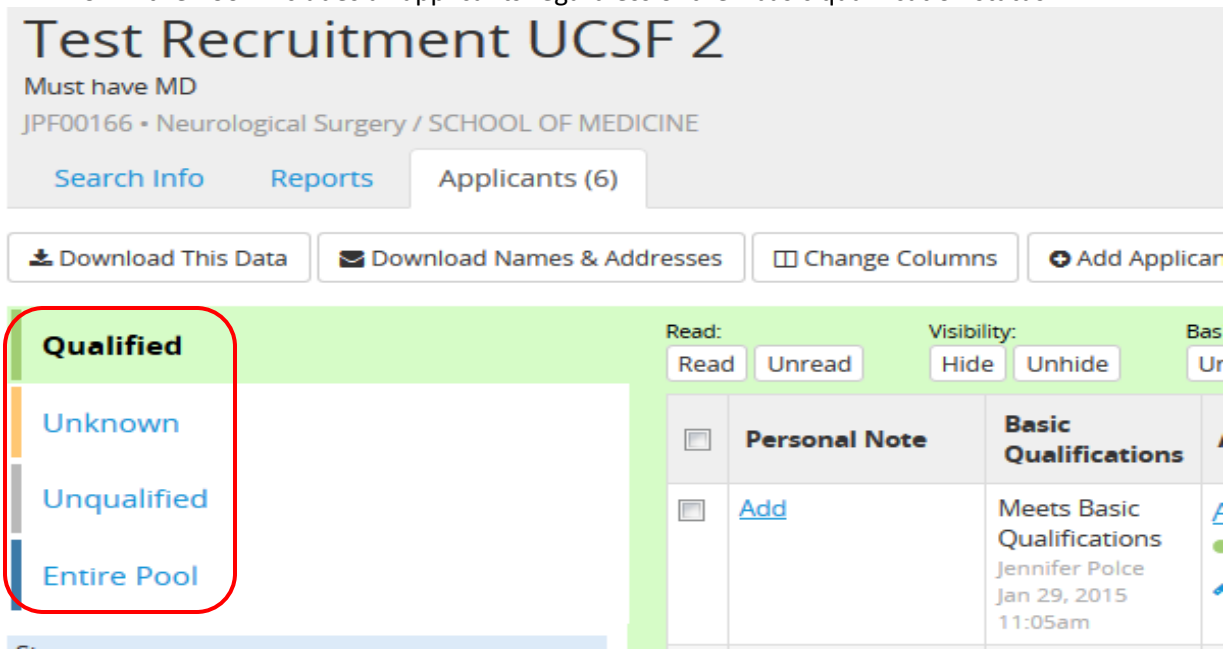
Disposition Reasons(s)
Application was incomplete, materials submitted were not the required materials
Candidate Withdrew
Degree was not in the advertised field(s) if specific (fields) were required
Did not meet stated basic clinical requirements
Did not meet stated basic research requirements
Did not meet stated basic service requirements
Did not meet stated basic teaching requirements
Did not meet stated basic years of experience required
Did not possess basic degree requirements stated in advertisement
Did not possess stated credentials (e.g., board eligibility/board certification)
Others, please specify

- **Assign Disposition Reasons for Multiple Applicants at a time**
  - On the “Assign Disposition Reasons” page (for either qualified or unqualified applicants), check off each applicant for which you want to assign the same disposition reason for
  - Click “Edit disposition reasons for selected applicants” near middle of the page, to access the dropdown menu and select a disposition reason

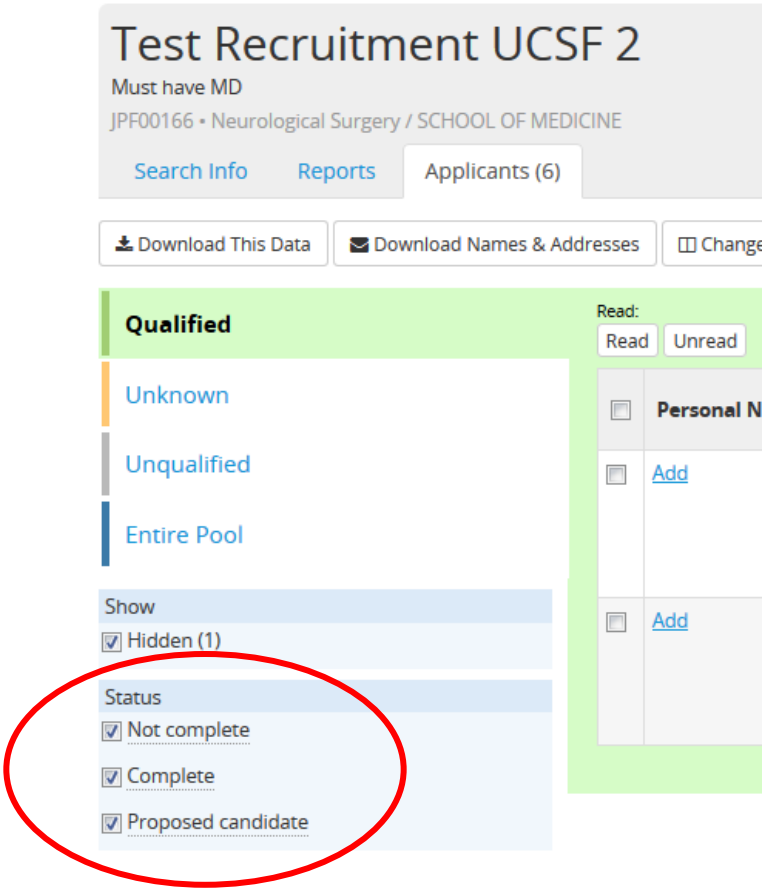


Filtering the Applicant List

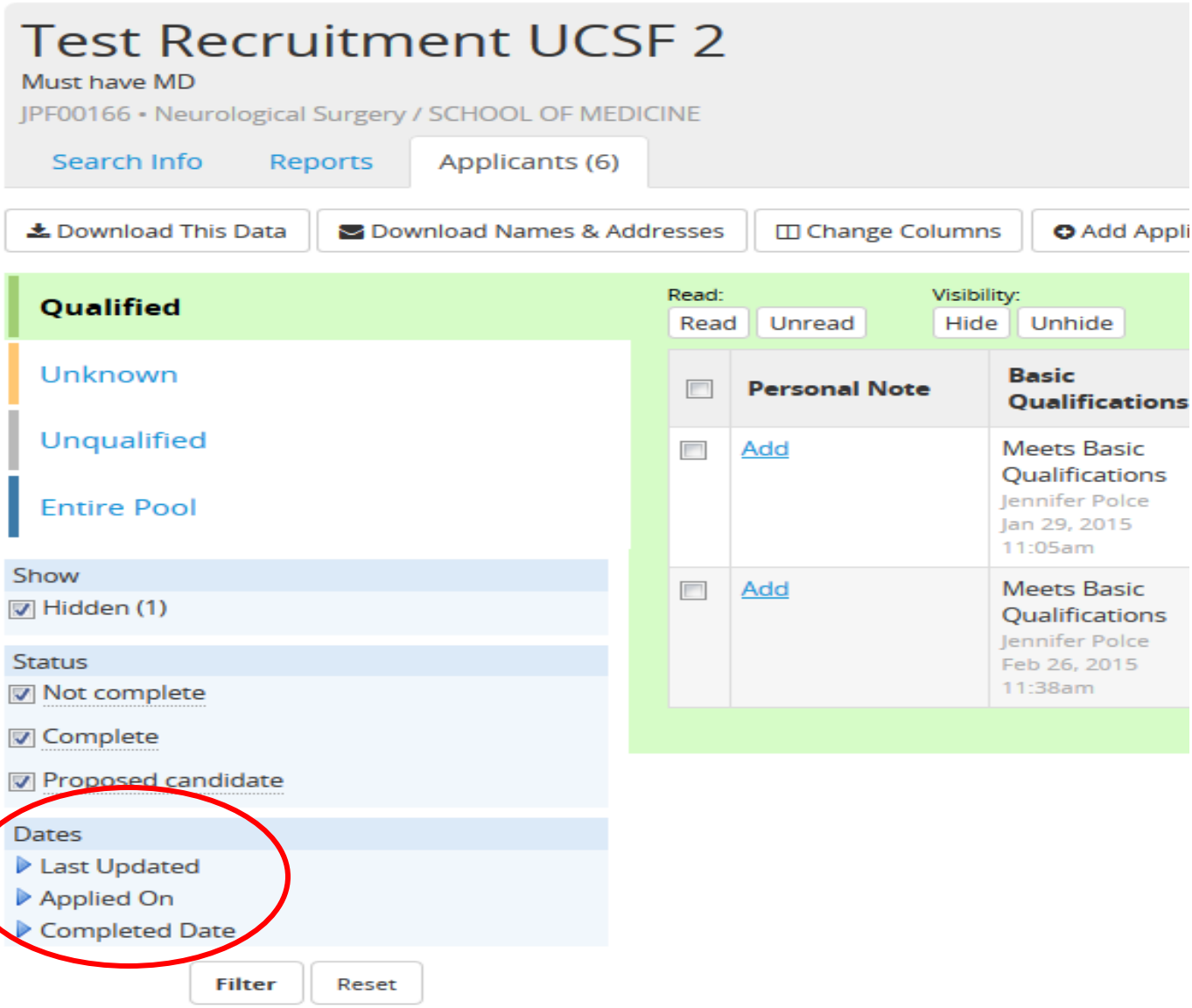
- **Filter applicants by qualification requirement, by selecting one of the following:**
  - Qualified: applicants that have met the basic qualifications
  - Unknown: applicants that have not been marked as qualified of unqualified
  - Unqualified: applicants that have not met the basic qualifications
  - Entire Pool: includes all applicants regardless of their basic qualification status



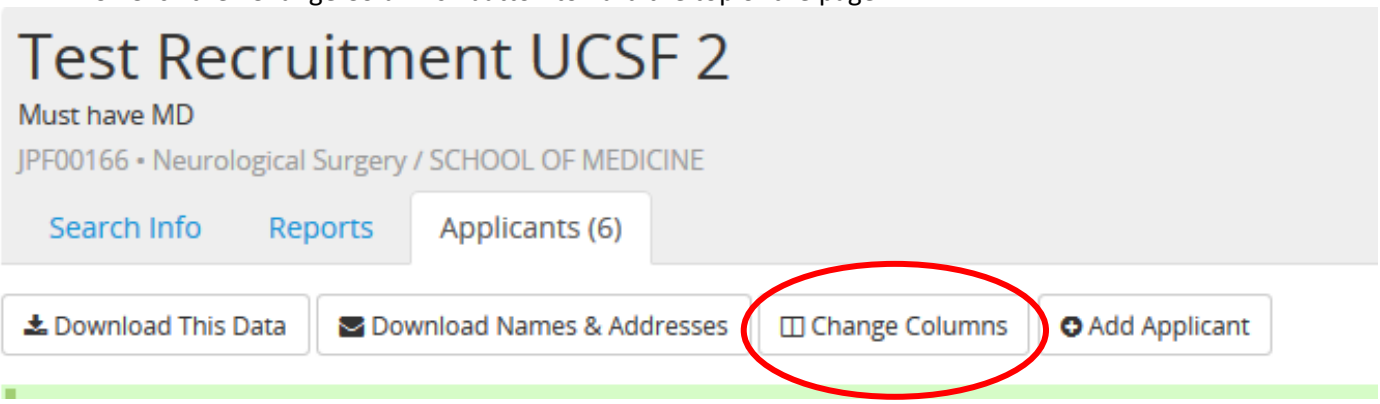
- **Filter applicants by status:**
  - From the left hand side of the page check the boxes below status (e.g., completed, not completed, not proposed) that you are interested in seeing applicants for
  - Check all of the boxes to show applicants in all status



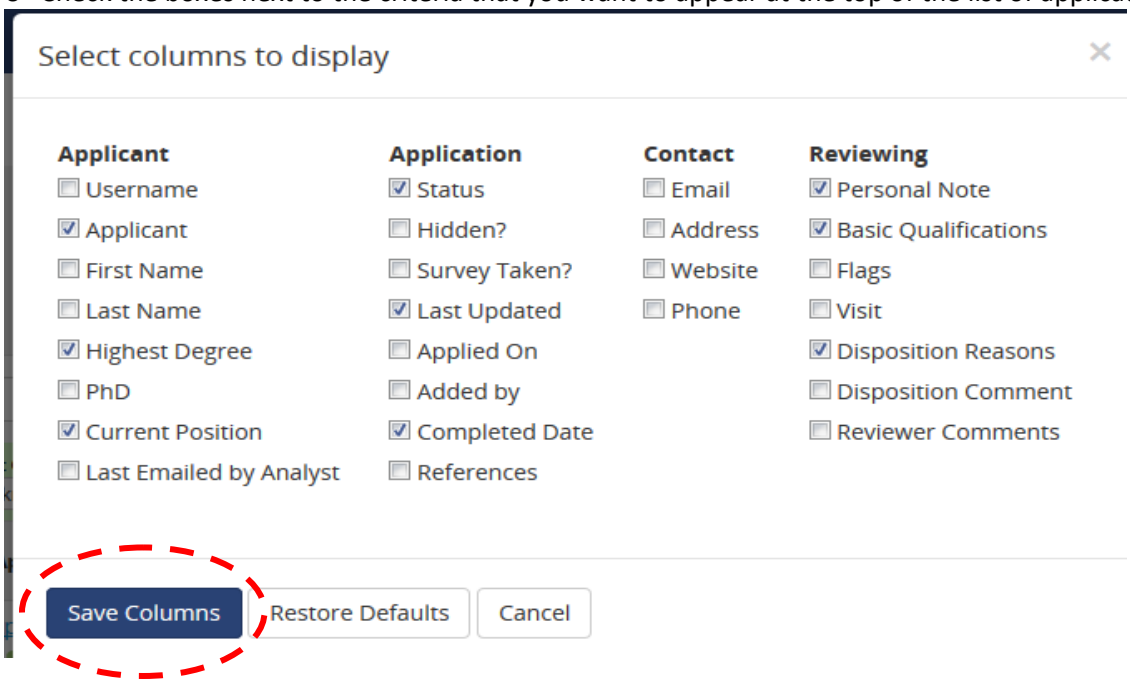
- **Filter applicants by the following dates:**
  - Date the application was last updated
  - Date the applicant applied on
  - Date the applicant moved to the “complete” status



- **Display applicant data by specifying column criteria**
  - Click the “Change Columns” button toward the top of the page



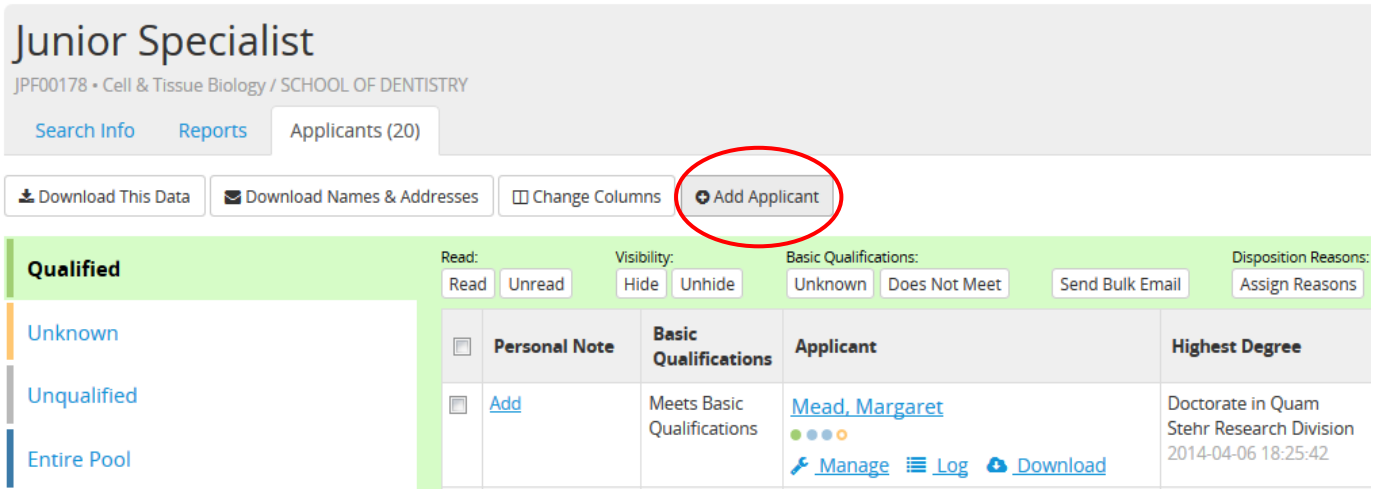
- Check the boxes next to the criteria that you want to appear at the top of the list of applications



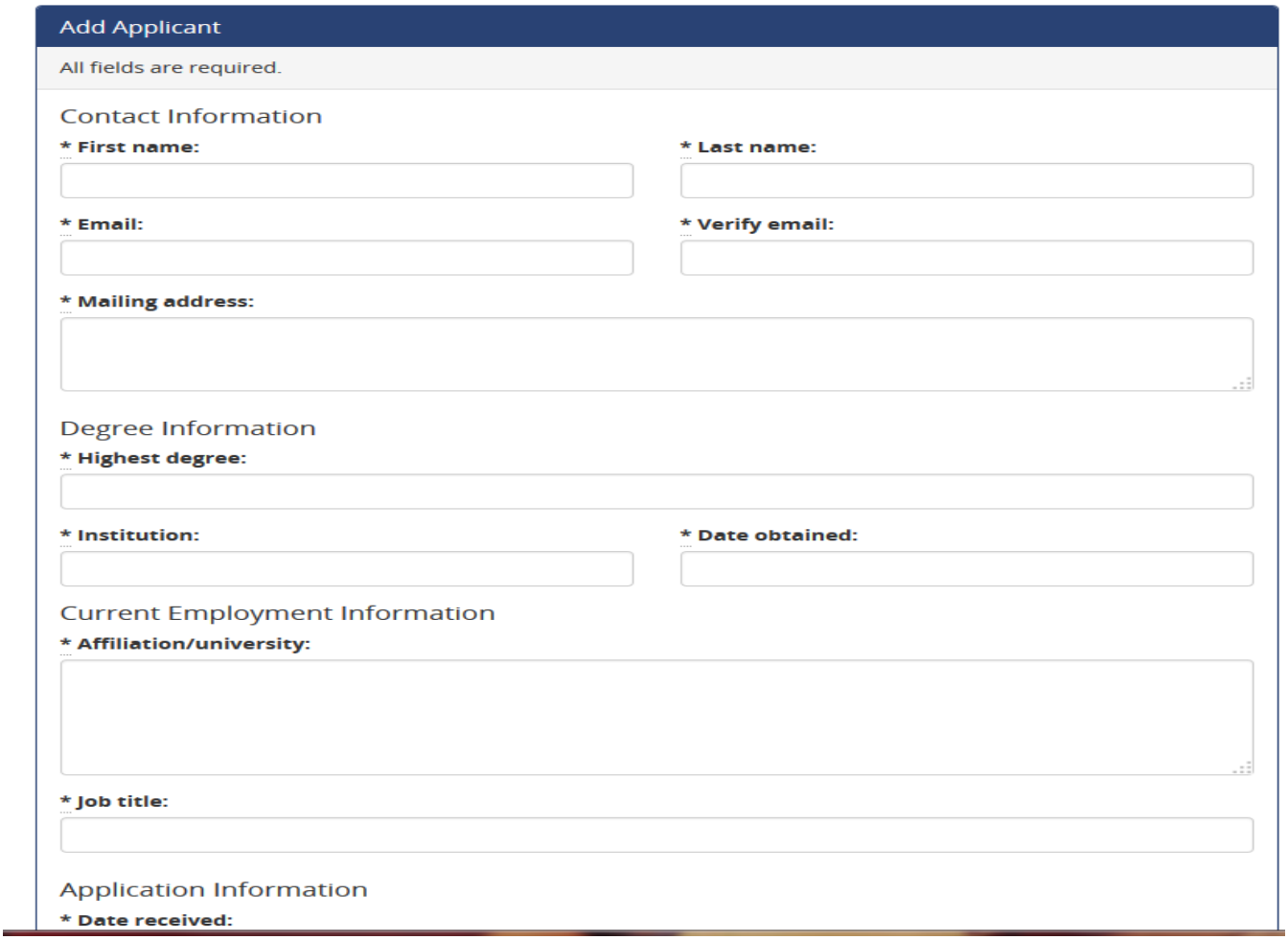
- Click “Save Columns” to save your choice

Adding an Applicant in AP Recruit

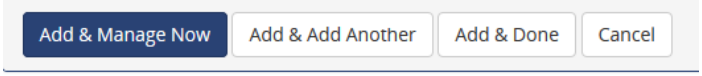
- **Add an applicant to your recruitment**
  - Click the "Add Applicant" button toward the top of the page



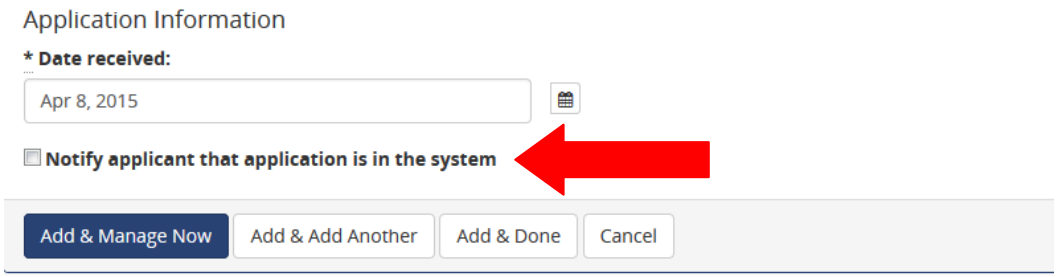
  - Enter required applicant information
    - Contact information
    - Degree information
    - Current employment information
    - Application information (date received)



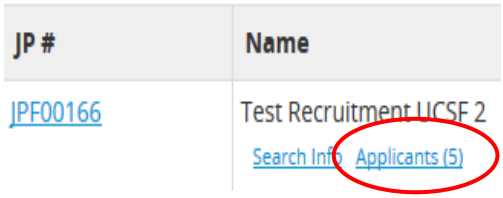
- After you've entered all the required information, click one of the 4 following buttons:
  - Add & Manage Now: Choose this button when you have completed the required information and want to proceed with uploading documents and reference information (see upload documents and add reference contact information below)
  - Add & Add Another: Choose this when you have more applications you would like to add
  - Add & Done: Choose this when you are finished with the required information; you may return to manage the application later
  - Cancel: Choose this if you do not want this application to be added



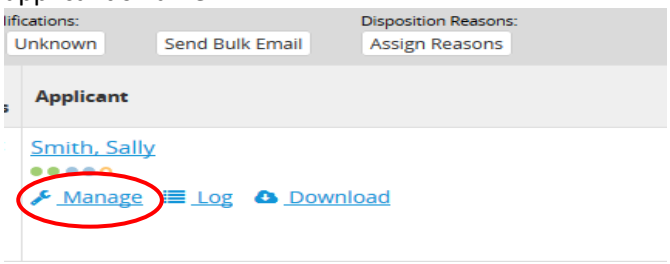
- Check the "Notify Applicant" box (beneath date received) to send a notification to the applicant informing him/her that an application has been established on their behalf.



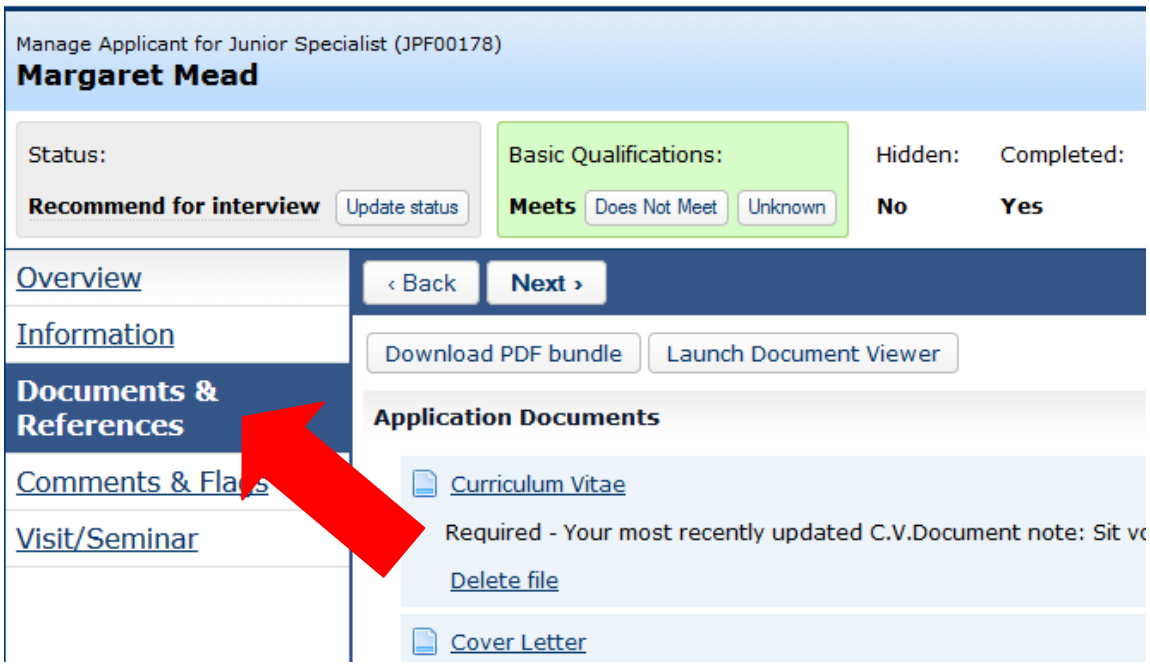
- **Upload documents**
  - Find the recruitment (by job number) and click the "Applicants" link below the name of the recruitment **(Skip to the third bullet point if you just clicked on the "Add & Manage Now" button)**



  - Find the applicant you want to upload documents for and then click the "Manage" link beneath the applicant's name

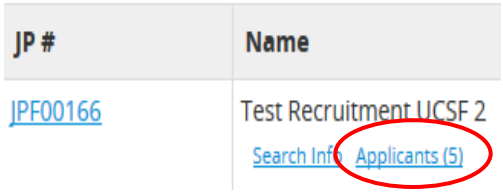


- Click the “Documents & References” link on the left side of the page

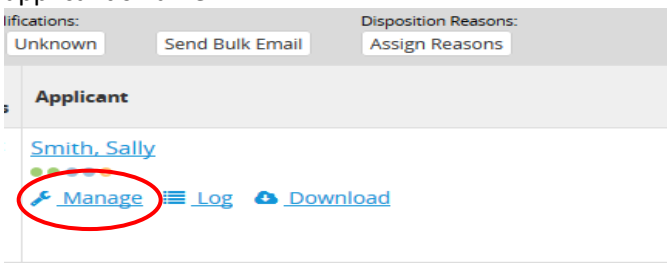


- Click the “Upload” link beneath any of the following categories:
  - Curriculum Vitae
  - Cover Letter
  - Statement of Research
  - Statement of Teaching
  - Miscellaneous/ Additional

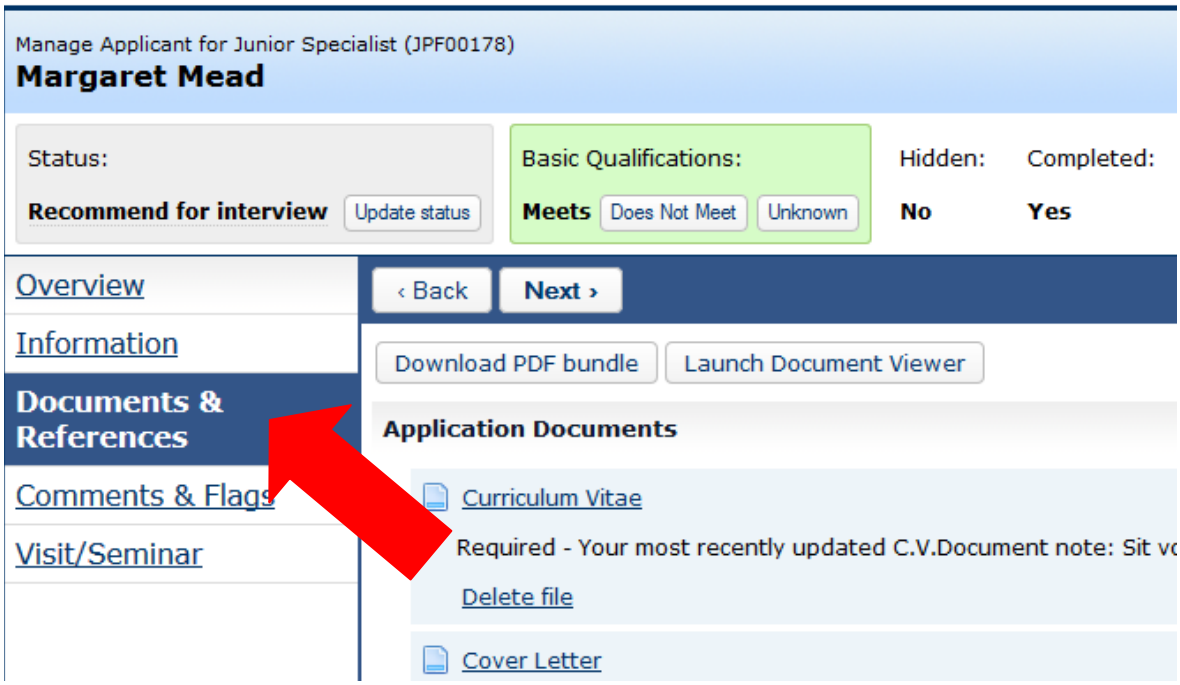
- **Add reference contact information**
  - Find the recruitment (by job number) and click the "Applicants" link below the name of your recruitment **(Skip to the third bullet point if you just clicked on the "Add & Manage Now" button)**



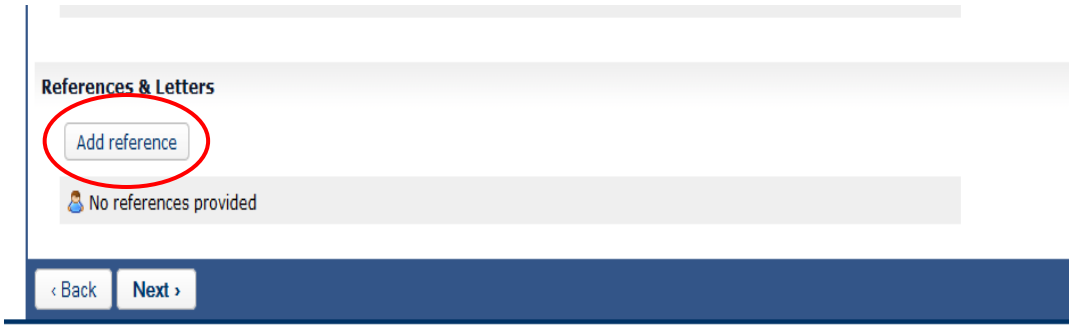
  - Find the applicant you want to add references for then click the "Manage" link beneath the applicant's name



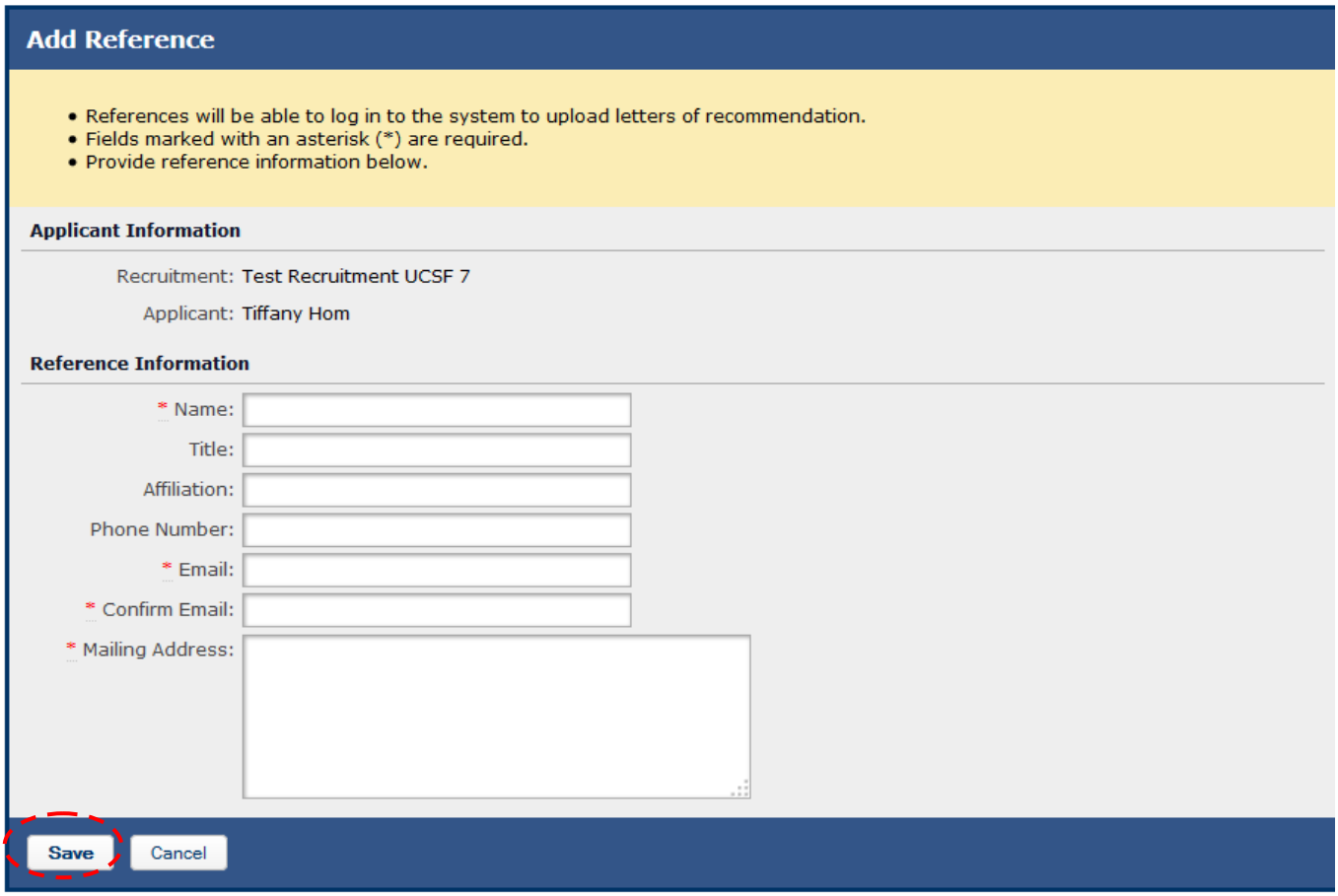
  - Click the "Documents and References" link on the left hand side of the page



  - Click the "Add Reference" button to add contact information for individuals to be solicited from AP Recruit for reference letters

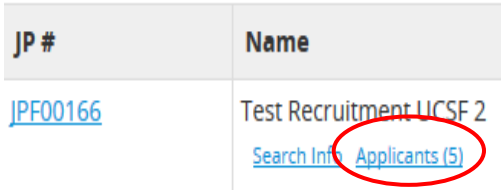


- Enter reference information and click “Save”

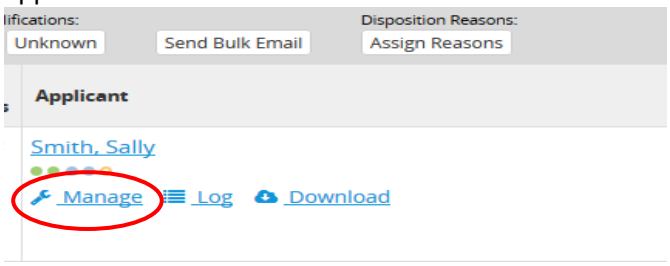


PLEASE NOTE: Reference contact information must be entered first (by you or the applicant) in order to upload or solicit letters.

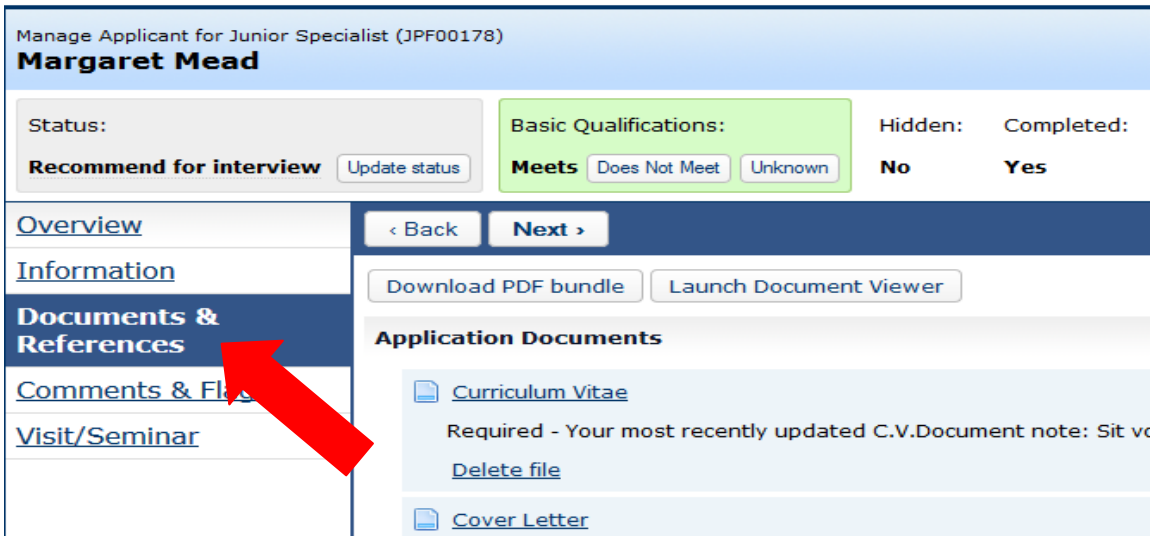
- **Upload reference letters**
  - Find the recruitment (by job number) and click the “Applicants” link below the name of your recruitment **(Skip to third bullet point if you just clicked on the “Add & Manage Now” button)**



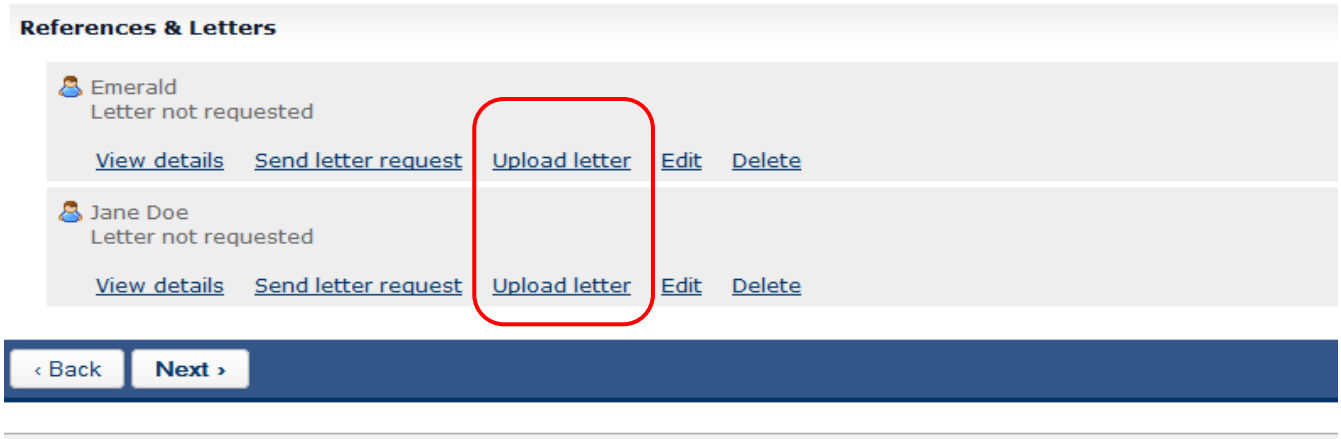
  - Find the applicant you want to upload reference letters to and click the “Manage” link beneath the applicant’s name



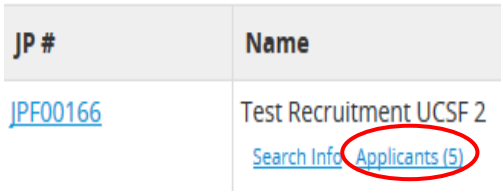
- Click the “Documents and References” link on the left hand side of the page



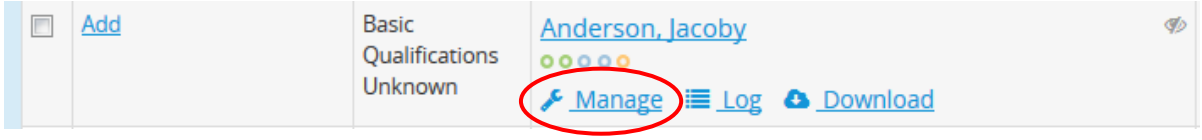
- Find the list of references toward the bottom of the page, under “References & Letters”
- Click the “Upload Letter” link beneath the name of the reference you wish to upload a letter for



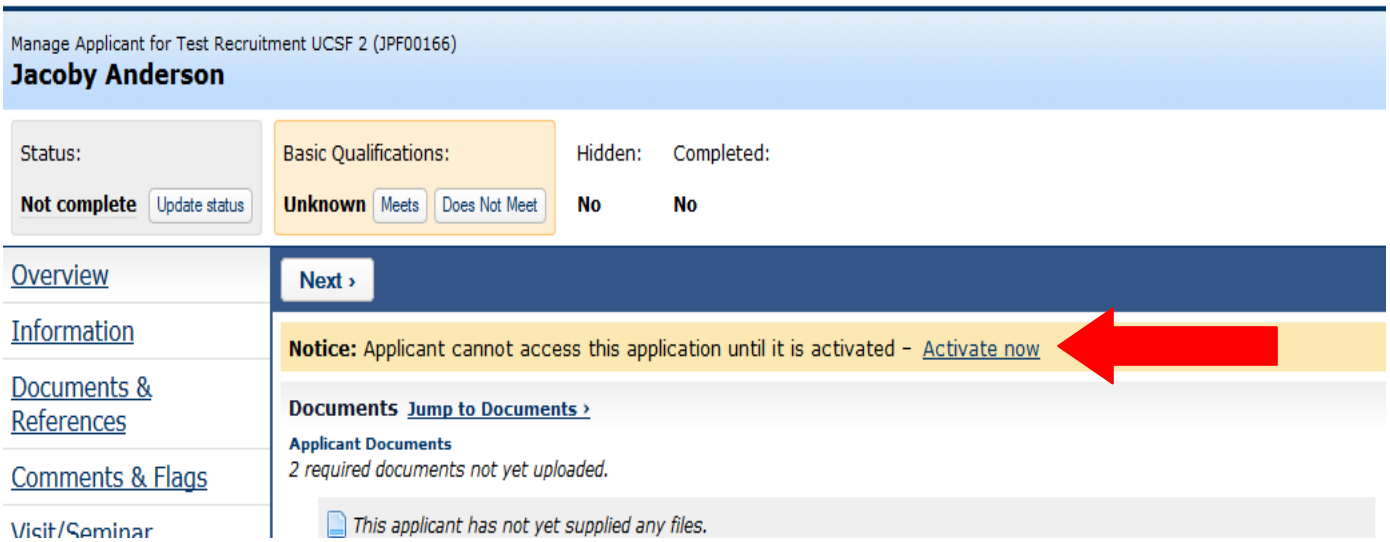
- **Activate the applicant that you’ve created an application for**
  - Find the recruitment (by job number) and click the “Applicants” link below the name of your recruitment



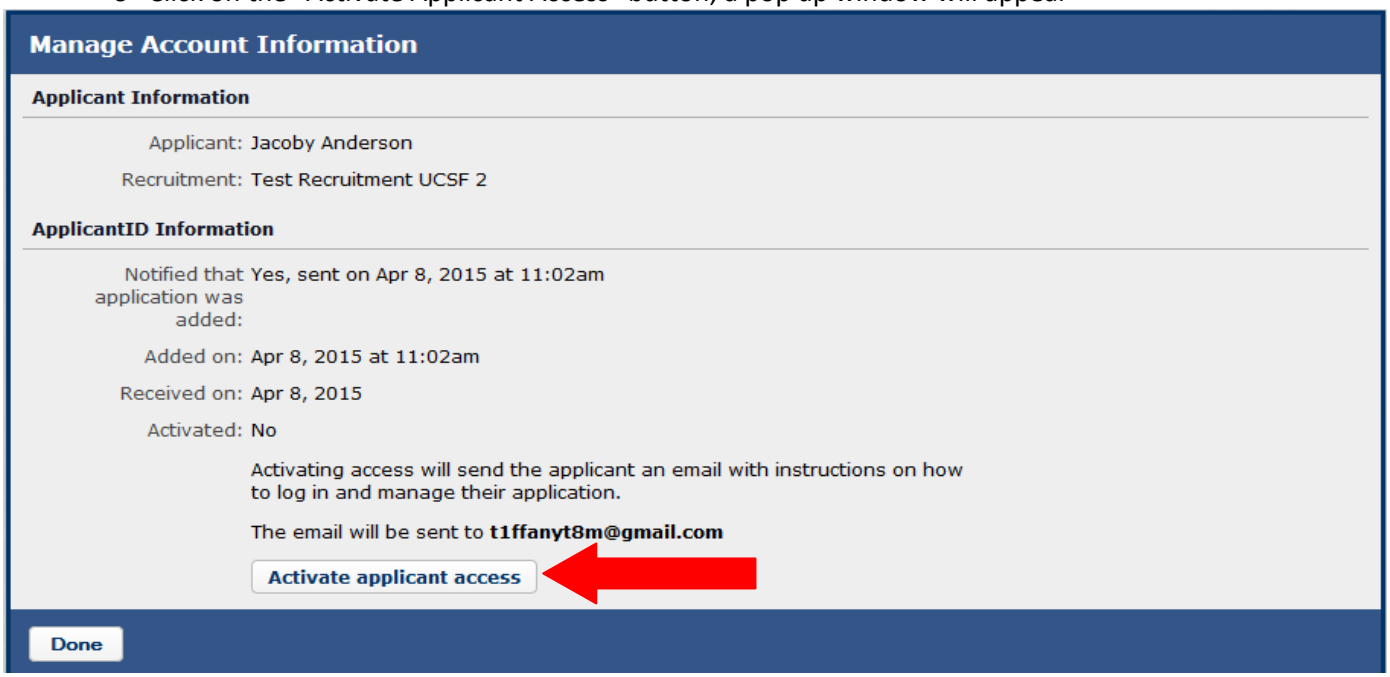
  - Find the applicant you wish to manage and click the “Manage” link beneath the applicant’s name



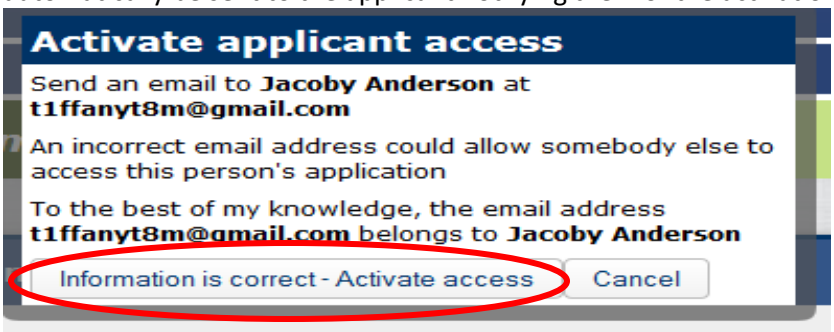
- Near the middle of the page click on the link “Activate Now” this will bring you to another page



- Click on the “Activate Applicant Access” button; a pop up window will appear



- Click on the “Information is correct- Activate access” button in the pop up window; an email will automatically be sent to the applicant notifying them of the activation



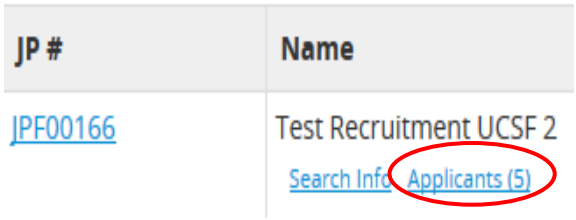
- Click “Done” once you have completed the previous step

PLEWASE NOTE: Applicants you’ve added manually cannot access their applications until you’ve activated them. You will have the option to resend an activation email to the applicant, if he or she did not receive the first one.

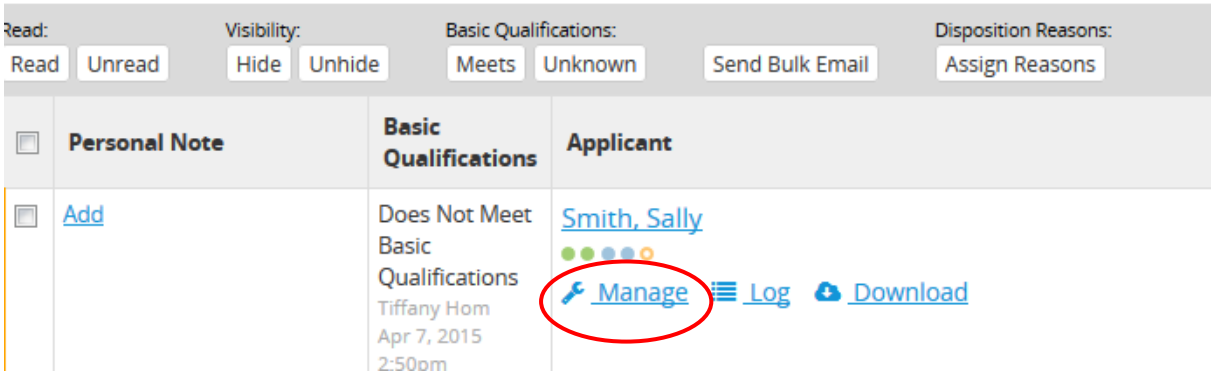
- **Manage the applicant that you’ve created an application for**
  - Navigate to the applicant’s application page 1 of 2 ways:
    - After you’ve clicked the “Add & Manage Now” button, you will automatically be taken to the applicant overview page
    - Find the recruitment that you’ve added an applicant to and click on the “Applicants” link; click on the “Manage” link beneath the applicant’s name
  - See steps for “**Managing Applicants in AP Recruit**

Other Optional Features

- **"Visit/Seminar" feature**
  - Find the recruitment (by job number) then click the "Applicants" link below the name of your recruitment

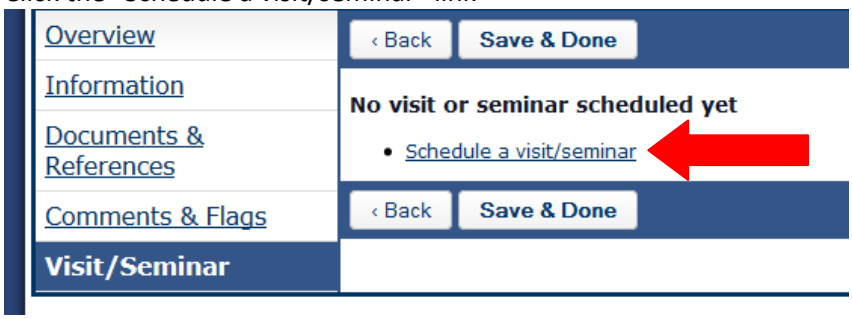


  - Click the "Manage" link beneath the applicant's name

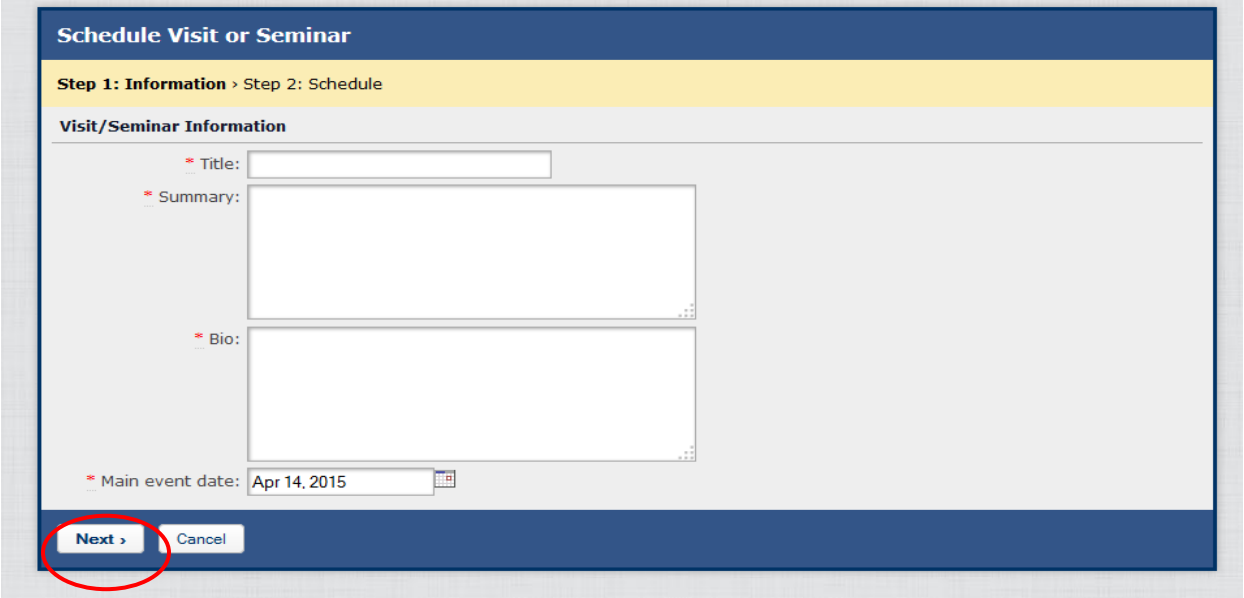


  - Click the "Visit/ Seminar" link on the left side of the page

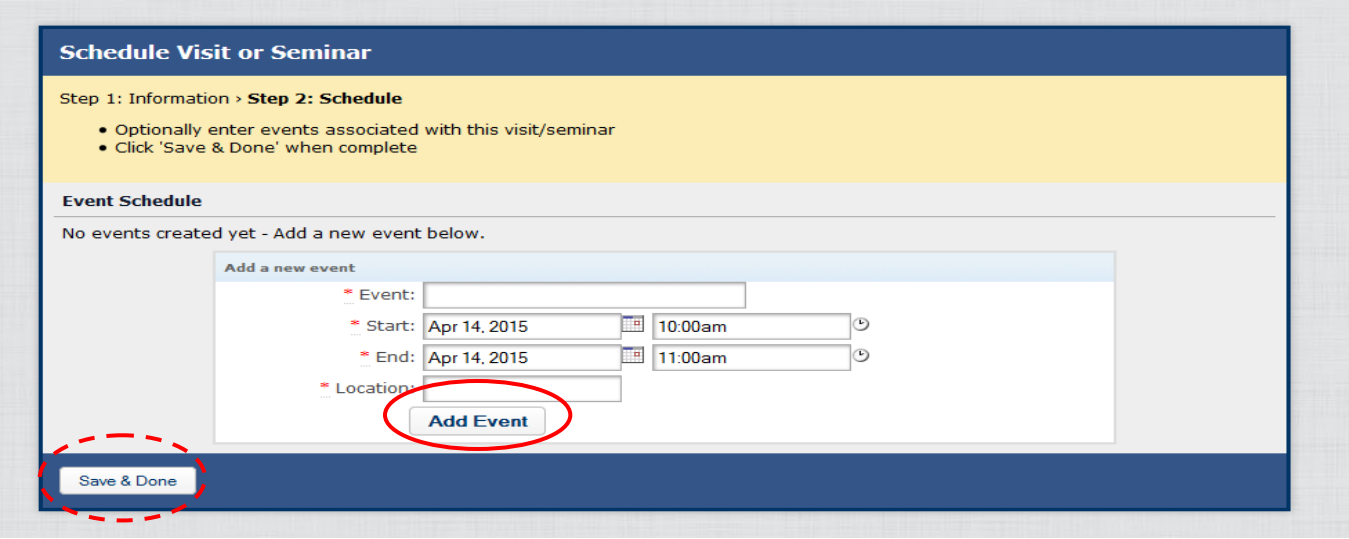
- Click the “Schedule a visit/seminar” link



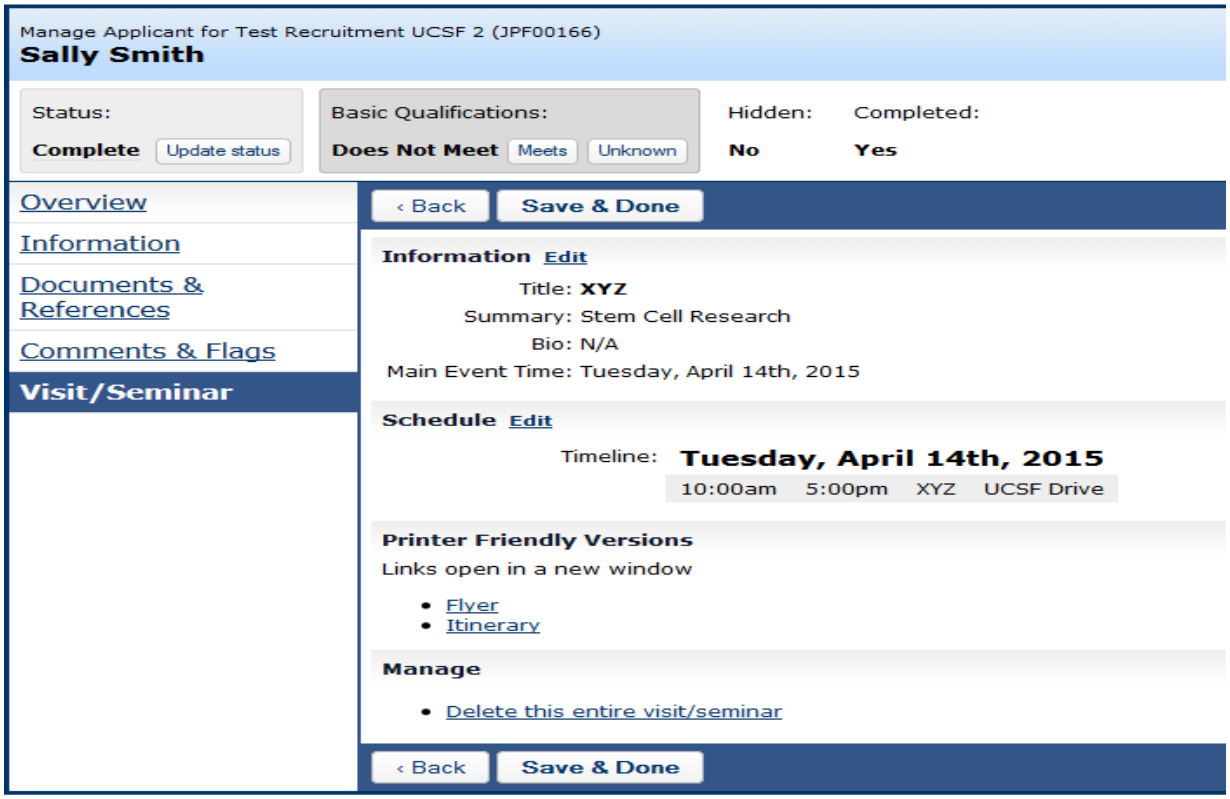
- Enter relevant information regarding the visit/seminar:
  - Title of the event
  - Summary of the event
  - Brief biography of the applicant
  - Date of the event
  - After you’ve entered the information, click the “Next” button **(all fields must be completed)**



- Enter the schedule details of the visit/seminar:
  - Title of the event
  - Day and time of the event
  - Location of the event
  - After you’ve entered the information, click the “Add Event” button



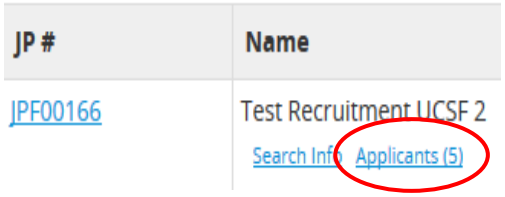
- Click “Save and Done”
- Once you’ve clicked “Save and Done”, a “Flyer” and “Itinerary” link will appear on the “Visit/ Seminar” page, which both provide printer friendly versions of your visit/seminar information



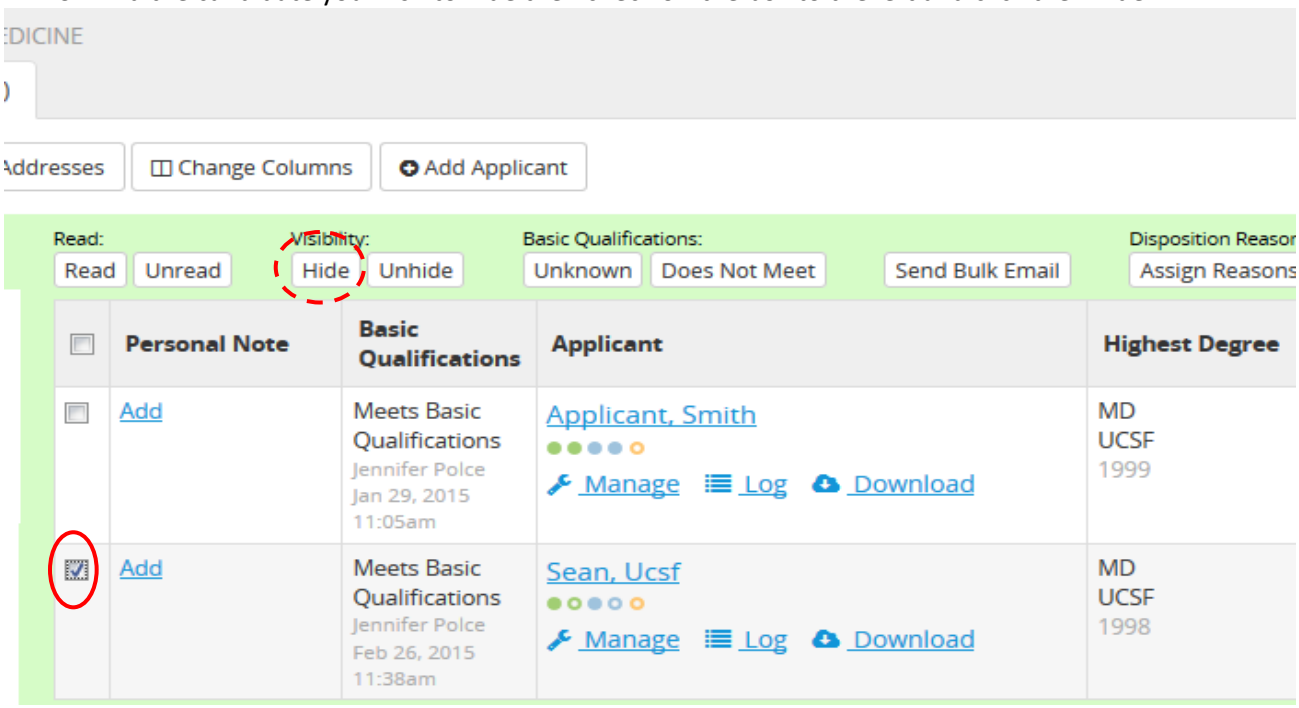
- The information for the “Visit/Seminar” will also appear on the applicant’s application page and will be visible to the committee members

PLEASE NOTE: The “Visit/Seminar” feature is NOT a scheduling tool and does NOT trigger a notification to the applicant. The Search Committee Chair or Staff Editor can use this feature as a way to document scheduling information on a person’s application. The committee members can view the scheduling information by clicking on an applicant’s name and viewing his/her application page.

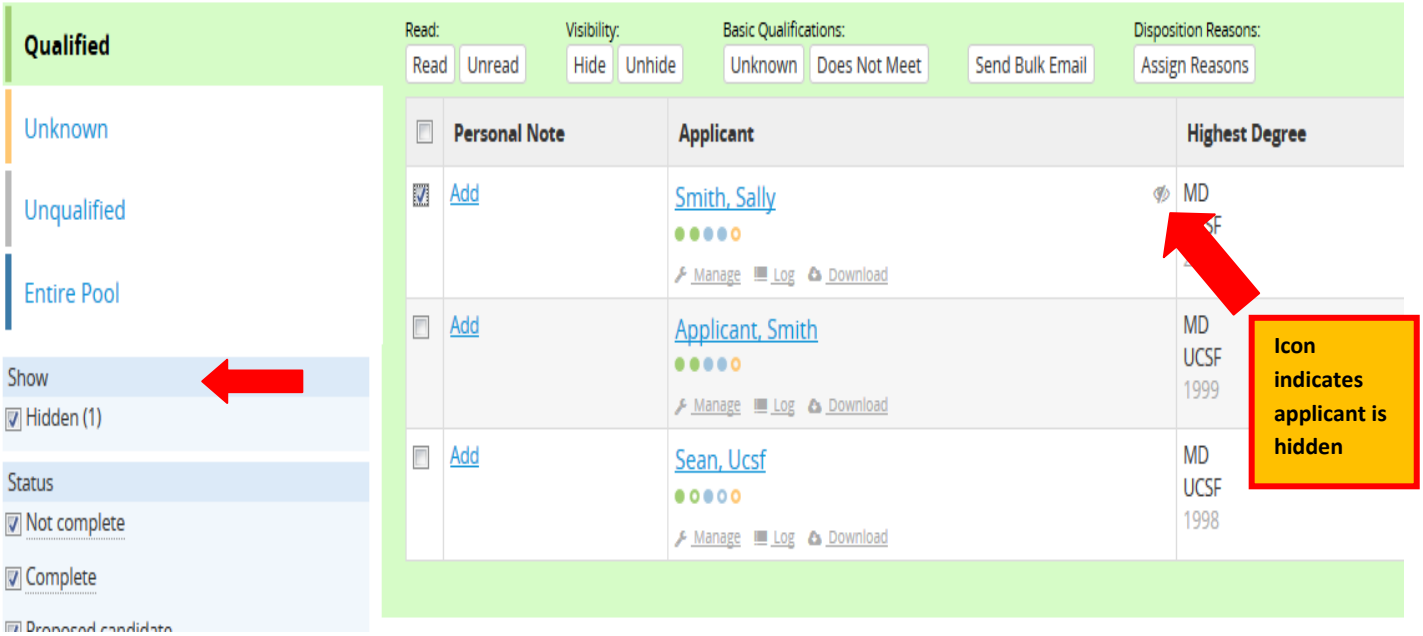
- **Hide an applicant from the view of the committee members**
  - Select recruitments tab then find the recruitment (by job number) and click “Applicants” link below the name of your recruitment



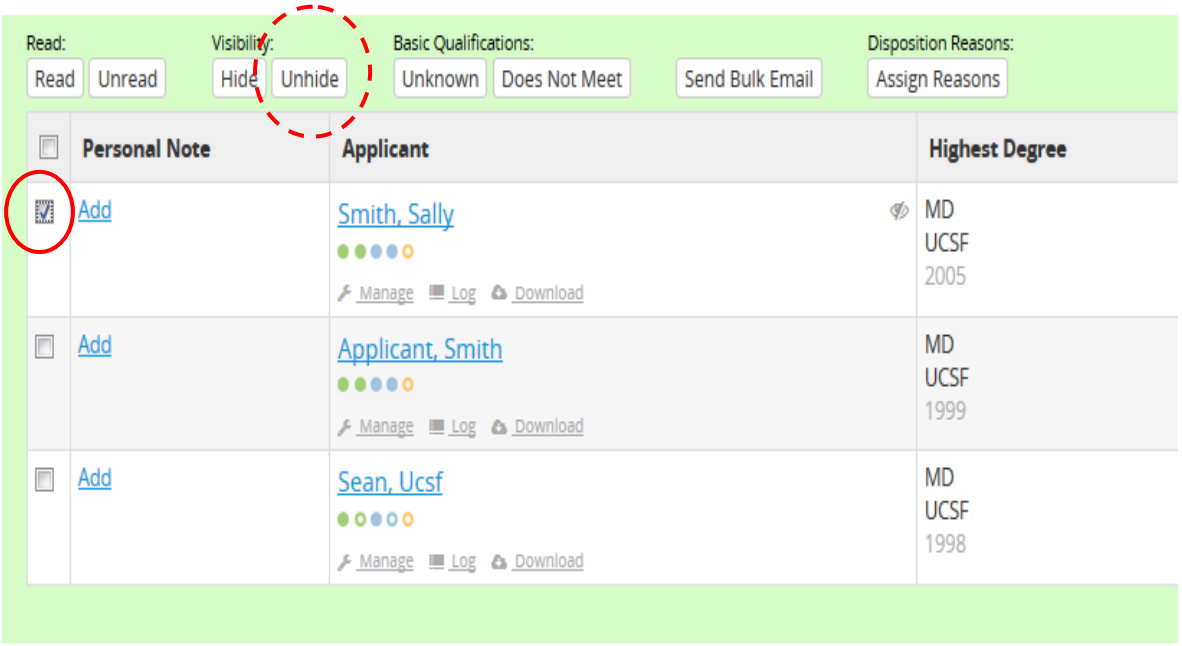
  - Find the candidate you wish to hide then check off the box to the left and click the “Hide” link



- **Unhide an applicant from the view of the committee members**
  - To view all the hidden applicants make sure the “**Hidden**” filter checkbox is checked (from left hand side of the page) and click “**Filter**”



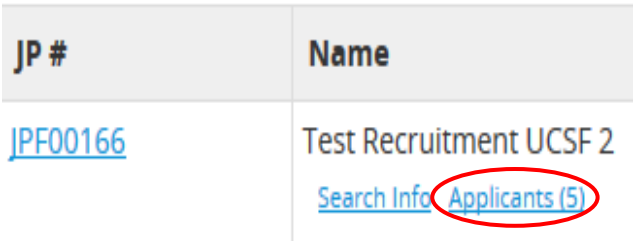
- Find the applicant you want to unhide and check off the box to the left of applicant's name



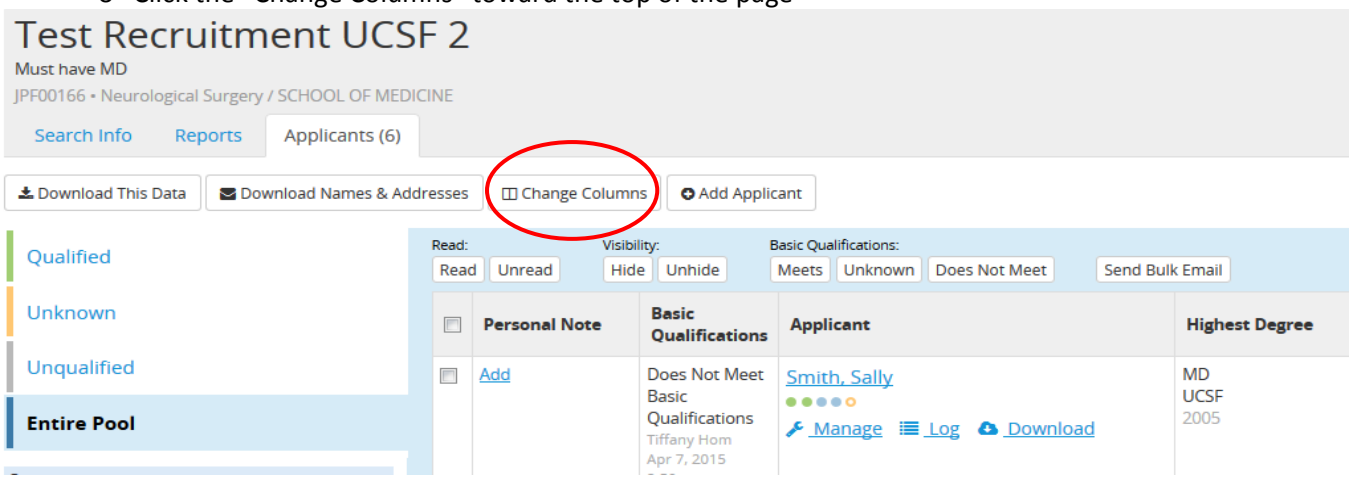
- Click the "Unhide" link

Please note: At UCSF we discourage the use of the "Hide" feature. The search committee should have viewing access to all applicants. Please refer to the instructions in cases where you have accidentally made applicants hidden, and need to make them visible to the committee.

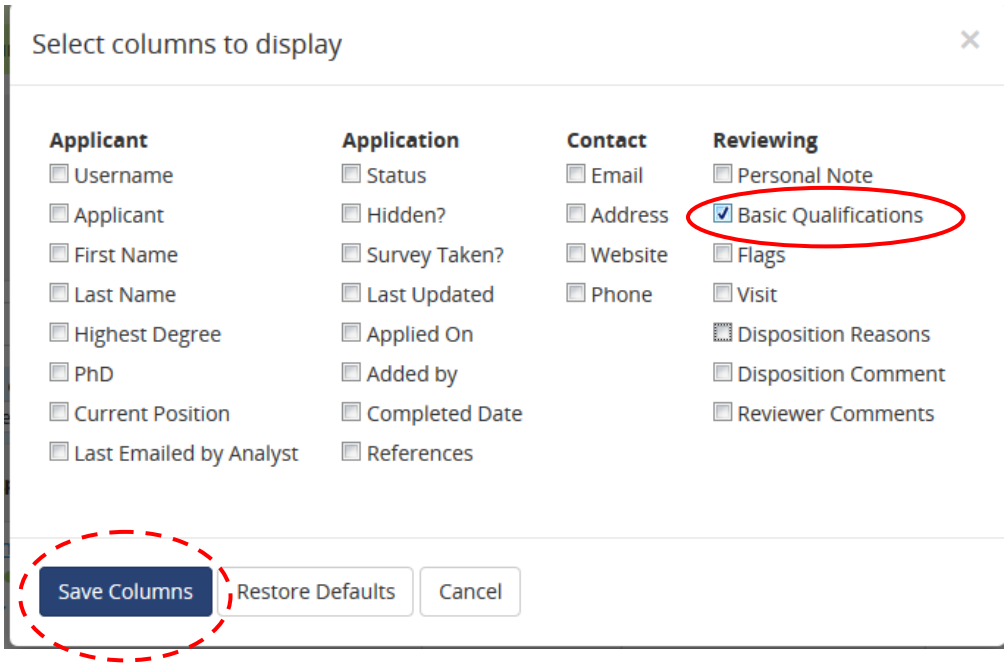
- **View basic qualification status of each applicant**
  - Select the recruitments tab then find the recruitment (by job number) and click "Applicants" link below the name of your recruitment



  - Click the "Change Columns" toward the top of the page



- Check the “Basic Qualifications” box



- Click “Save Columns”. Basic qualifications should appear next to applicant’s name

- **View the “Application Log”**
  - Find the applicant’s name that you wish to view his or her application
  - Click the “log” link below the applicant’s name

  - The application log will show you any changes/ updates that have been made to the applications (e.g. date and time a letter of reference was uploaded)