<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gain Approval for Hire</td>
<td>Approval may come via the annual staffing process through the Dean’s Office - or-through submitting a Footprints request for positions that were not approved through the annual staffing process (staff positions, “bridge” positions/Group IV, refilling vacancies caused by resignations, retirements, terminations, etc).</td>
<td></td>
</tr>
<tr>
<td>Update Job Documentation as Necessary (Staff Positions)</td>
<td>Contact the HR Liaison to request the most recent job documentation. Updated documentation will be needed if the current documentation is older than 3 years, or if there are going to be changes to the essential functions of the position.</td>
<td></td>
</tr>
<tr>
<td>Complete Requisition In People Admin</td>
<td>Complete a new requisition in PeopleAdmin. Be sure to include updated job documentation with the requisition. It can be attached under the “Posting Documents” section in the requisition.</td>
<td></td>
</tr>
<tr>
<td>Send to “Planning Unit” for approval. (The HR Liaison will receive the requisition once the Provost’s Office approves)</td>
<td>The HR Liaison will review and send to the Provost’s Office for their review and return to the HR Liaison upon approval for posting. The HR Liaison will review the requisition and may provide suggestions in regards to the recruitment plan, how we word qualifications, and screening questions that may be utilized. The HR Liaison will forward the request on to Compensation if a review is needed -or- the HR Liaison will then post the position on the OHIO jobs website, LinkedIn, Twitter, HigherEdjobs.com, OhioMeansJobs, and Workforce WV.</td>
<td></td>
</tr>
</tbody>
</table>
## Position is Posted

<table>
<thead>
<tr>
<th></th>
<th><strong>Place Targeted Advertisements</strong></th>
<th>The hiring manager should coordinate any advertising specified in the recruitment plan outside of the sites identified by HR (LinkedIn, Twitter, HigherEdJobs.com, OhioMeansJobs, Workforce WV)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><em>In general, postings should be at least 15 days in duration.</em></td>
</tr>
</tbody>
</table>

## Posting Closes – Applicant Review/Selection Begins

<table>
<thead>
<tr>
<th></th>
<th><strong>Applicants are Pre-Screened</strong></th>
<th>The hiring manager/search committee should begin screening applicants based upon the minimum and preferred qualifications stated in the job posting. Prescreening activities may include: 1 or more individuals ranking applicants based upon qualifications; telephone interviews, Skype interviews, e-interviews, etc. There may be several layers of “pre-screening” activities that take place before a FINAL interview pool is selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>Description</td>
<td></td>
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<tr>
<td>----------------------------------------------------------------------</td>
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<td></td>
</tr>
<tr>
<td>Complete “Pre—Interview Candidate Selection Form”;</td>
<td>After the FINAL pool of candidates is selected via pre-screening activities, the hiring manager should update each applicant’s status in PeopleAdmin and complete the Pre-Interview Candidate Selection Form in the PeopleAdmin Requisition.</td>
<td></td>
</tr>
<tr>
<td>Update Applicant Status;</td>
<td>For Group I faculty positions, the HR Liaison will present the final interview pool and appropriate documentation to the Dean for approval.</td>
<td></td>
</tr>
<tr>
<td>Submit Final Interview Pool to Planning Unit</td>
<td>After the pool has been approved by the HR Liaison and the Dean (if applicable), the HR Liaison will forward the pool on to Institutional Equity for their review.</td>
<td></td>
</tr>
<tr>
<td>Await approval of final pool from OIE</td>
<td>OIE will examine the interview pool to ensure compliance with the university’s diversity initiative and other state/federal rules and regulations.</td>
<td></td>
</tr>
<tr>
<td>Schedule and Conduct Face to Face Interviews</td>
<td>For staff position’s (classified and administrative positions), please include the HR Liaison in face to face interviews.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Dean does not require meetings with any faculty candidates. However, hiring managers may arrange a meeting between the Dean and candidates if they so choose.</td>
<td></td>
</tr>
</tbody>
</table>
## Successful Candidate(s) Selected—Offer and Requisition Closeout Begins

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extend a Verbal Offer</td>
<td>For faculty positions, the hiring manager may make an offer with the approved range from the annual staffing process or Footprints request.   For staff positions, the hiring manager should consult with the HR Liaison to determine develop a strategy for making the offer.</td>
<td></td>
</tr>
<tr>
<td>Completing the Hiring Proposal and Closing Out the Search</td>
<td>Each candidate’s status should be updated in PeopleAdmin.</td>
<td></td>
</tr>
<tr>
<td>React to acceptance / rejection of final offer.</td>
<td>Should negotiation beyond the approved salary range be necessary, the hiring manager should consult with the HR Liaison who will coordinate and seek appropriate approval from the Dean’s Office.</td>
<td>See Page 17</td>
</tr>
<tr>
<td>Update the PeopleAdmin Requisition</td>
<td>Update the final applicant(s) status in PeopleAdmin and change the status of the requisition to “Offeree(s) Selected”</td>
<td>See Page 17</td>
</tr>
<tr>
<td>Complete the Hiring Proposal/Hiring Form in PeopleAdmin</td>
<td>Complete the hiring form in PeopleAdmin. <strong>Remember, for new employees, you will need the employee’s social security number and date of birth to complete the form.</strong>  Once the hiring form is complete, make sure to click the orange button and “send to Planning Unit for approval”.</td>
<td>See Page 17</td>
</tr>
</tbody>
</table>
### FACULTY POSITIONS:
The HR Liaison will review the hiring proposal and either consults with the hiring manager for more information or provide an offer letter to the hiring manager for approval. The hiring form will then be routed to the Employee Service Center for entry into Oracle.

### STAFF POSITIONS:
The HR Liaison will review the hiring proposal and either consults with the hiring manager for more information or approves the proposal. Once approved, the Employee Service Center will process and email an offer letter to the hiring manager and HR Liaison.

### OTHER IMPORTANT TOPICS

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>WAIVERS OF POSTING-</td>
<td>See Page 5</td>
</tr>
<tr>
<td>Diversity Initiative Information-</td>
<td>See Page 18</td>
</tr>
<tr>
<td>Opportunity Hires</td>
<td>See Pages 19-20</td>
</tr>
<tr>
<td>Reference Checking and Background Checks</td>
<td>See Page 21</td>
</tr>
</tbody>
</table>
Creating a Requisition/Job Posting:

The Following Guide was made as a visual, quick reference guide to supplement process outlines on the UHR website. This guide has been tailored to the College of Arts and Sciences and may differ slightly from the standard process outlined by the document on the UHR website. Should conflict exist between the documents, the general rule of thumb is that the College process trumps the standard process. The HR Liaison should be contacted if you are unsure of how to proceed at any point during the process.

The HR Documentation is located at:
http://www.ohio.edu/hr/emplyment/unload/Creating_Requisition_3.pdf

Signing On:

***You need a special account to utilize PeopleAdmin as a hiring manager. Please contact the HR Liaison if you need assistance obtaining or accessing your login information.

REMEMBER: Your PeopleAdmin password may not be the same as your OHIO.

Go To: https://www.ohiouniversityjobs.com/hr

Login Using your unique PeopleAdmin userid and password

Select You Position Type:

Welcome to your Online Recruitment System
Choose the appropriate employment category for
Faculty/Admin/Research/PostDoc

For Classified Positions that are awaiting compensation review chose the CURRENT job title.
NEXT SCREEN:

utility (Faculty / Admin Regular)
Approved
Faculty / Admin
Created by: System Administration

CLICK HERE! 😊

Details

Information

Application Title: Faculty
Title: Faculty
Description:

Starting the New Posting:

Job Title: Use the current, approved job title.
Select the appropriate Department.

ADMIN/FACULTY: Choose "Under Review by Department"
CLASSIFIED positions default to "Under Review by HR"

For STAFF positions, DO NOT CHECK THIS BOX!

FACULTY POSITIONS: If you wish to use the reference letter feature, please check this box and select the appropriate settings. More can be found about this on PAGE XXXXX
Online Applications
- Accept online applications!

Special online application instructions:

Accepted Application Forms
1. Comprehensive Application - Applicant
2. Comprehensive Application NO REFERENCE LETTERS - Applicant
3. Quick Application - Applicant
4. Quick Application NO REFERENCE LETTERS - Applicant

Click here when you’re finished!

WHATS THIS MEAN?!

A COMPREHENSIVE application asks the applicant for complete educational and work history. A QUICK application just asks for the basics (USE THE QUICK APP IF YOU ARE ASKING FOR A CV OR RESUME).

If you are not requesting reference letters, make sure you sat NO REFERENCE LETTERS.
Waivers of Posting:

In general, waivers of posting are utilized when a department has a special request that varies from our national, 15 day posting standard.

Departments may request that the posting period be shortened, that a posting is only open to departmental-wide, college-wide, or university-wide, or that the posting period may be eliminated entirely.

Occasions that may warrant a Waiver include (but aren’t necessarily limited to):

- Promotion or transfer opportunities for internal candidates who were originally hired through an open and competitive process
- Candidate located with extremely unique skill sets in very short supply
- A specific person is required as a part of a grant agreement for purposes of continuity of specific research

For more information about waivers and how the hiring process differs when a waiver is involved, please visit: [http://www.ohio.edu/hr/employment/upload/Requesting_a_Waiver_of_Posting.pdf](http://www.ohio.edu/hr/employment/upload/Requesting_a_Waiver_of_Posting.pdf)
Required fields are self-explanatory in this section.

Explain to applicants what info they need to provide, what forms to attach, etc.

For Staff positions, the job description should be tailored using the information provided on the Position Description.
List where the department is advertising here. UHR automatically advertises on Twitter, LinkedIn, Higheredjobs.com, OhioMeansJobs, and Workforce WV.

See Diversity Initiative Standards for More Information.

Click here when done with this page.
Budget Information:

The budgetary information should reflect that which was approved in the annual staffing plan or in the Footprints ticket. The HR Liaison will verify budgetary information during the planning unit approval phase.

If filling more than one position, please list TOTAL FTE.

Use PER POSITION figures below for financial info.

Click here when done with this page.
Applicant Documents:

Select which documents you want the applicant to submit. Remember, the applicant cannot submit the application for review until they attach ALL REQUIRED documentation.

If you are using the reference letter feature, select “NOT USED” for “References”.

Click here when done with this page.
Posting Specific Questions:

Applicant questions can be utilized to assist in the applicant pre-screening process based on minimum and preferred qualifications. Carefully crafted questions and responses can be effectively utilized:

- for informational purposes only,
- to rank or score applicants or,
- To screen-out applicants who do not meet the minimum criteria (example: PhD required).

For assistance with this feature, please contact the HR Liaison.
Guest User

Using this feature creates a unique account that can be utilized by Search Committee members to access applicant and posting information. Guest users cannot modify or change anything associated with the requisition.

Guest User

Click on the Create Guest User Account button. The system will automatically generate a Guest Username. Guest Users will still need to contact the Hiring Manager or HR to receive the Guest User Password. You may update the password if needed.

You can also notify the members of the review committee by adding their email address in the Email Address of Guest User Recipients. Each email address must be on a separate line. Once you have added all of the email addresses, click on the Update Guest User Recipient List to notify the review committee users.

When finished or to skip this section, click the Next button.

Want to give guests access to view this posting?

Click here when done with this page.
Reference Letters:

This feature collects letters of reference directly from the reference provider electronically, which may be viewed as a part of the application materials.

- Applicants will be prompted for contact information of reference letter providers (volume determined by you by setting minimum and maximum number).
- The reference provider receives an invitation via email to provide a recommendation and a unique link to upload their document.
- Reference letters may be collected for all applicants or only for those of selected by the hiring manager.
- Applicants do not have access to the uploaded reference letters.

Referees will receive technical instructions automatically in their email. Use this space to instruct the referee on any certain subject, criteria, etc. that you would like to be addressed in the letter.

Click here when done with this page.
SUMMARY AND REVIEW:

Once everything looks good, it's time to change the status of the posting.

From the requisition Summary, an orange highlighted "Take Action on Posting" button appears in the upper right hand corner. There are four action options:

- Keep working on this posting – this leaves the posting in Draft status and only the creator can access
- Send to Departmental Review – this keeps the requisition at Hiring Manager level, but allows other designated departmental users access to the requisition
- Planning Unit – this moves the requisition to the HR Liaison for review
- Regional Campus Dean – this is for regional campuses only to allow the Dean to review before submitting to the RHE approver
Complete "Pre—Interview Candidate Selection Form";

Update Applicant Status;

Submit Final Interview Pool to Planning Unit

After the recruitment phase is complete, but before the final screening stage (normally the on-site interview), approval of the finalist pool must be granted. Complete the Pre-Interview Candidate Selection Form and update the status of all applicants.

1. Complete the Pre-Interview Candidate Selection Form – can be completed at the status of Posted or Closed
   - Open the requisition
   - From the requisition summary, the first section of the requisition should be "Pre-Interview Candidate Selection Form"
   - Choose the Edit link beside the section header to open that section and complete the form
   - When finished, choose Save, then return to the Summary

In these sections, you want to provide a narrative for what steps were taken to disqualify applicants and narrow the pool. Be sure to include any criteria used for evaluation (min. or pref. requirements) and the method used (constructing a matrix, ranking, scoring, discussion, etc).
1. **Update the Status of Each Applicant**
   - From the requisition, go to the Applicants section.
   - You may change a single applicant by clicking on the applicant’s name, and then choosing “Take Action on Job Application.”
   - You may also bulk transition a group of applicants:
     - Select the applicants you wish to update by clicking in the box to the left of the applicants’ names.
     - Hover over the grayed "Actions" button above the "(Actions)" column, and choose “Move in Workflow.”
     - If changing the status of multiple applicants, select from “Change for all applicants” drop-down options and choose one state for all. If needed, you can then select unique statuses for each person. Some statuses require that a reason be chosen. If prompted, choose one reason code for all applicants, and then you should change each person individually to accurately describe the reason for each person’s transition.
   - **NOTE:** All applicants should be transitioned to either “Select for FINAL Interview/Selection Step” or “Not interviewed, not hired” or “Pre-Interviewed, Not Hired” prior to submitting for approval.
   - When finished, choose “Save changes.”

2. **Submit Interview Pool for Approval**
   When the Pre-Interview Candidate Selection Form is complete and the applicant status’ are updated and the requisition is at the status of “Closed,” the requisition can be submitted to
the Planning Unit (who will review and submit to the Office for Institutional Equity).

- Hover over the orange “Take Action on Posting” link on the top right-hand corner of the requisition
- Select either, “Submit Interview Pool to Planning Unit” (Faculty/Admin position types) or “Submit Interview Pool to HR” (Classified position types) and confirm
- When the interview pool has been approved, the Hiring Manager should receive an email stating that the requisition is at the status of Interview Pool Accepted. Interviews may be scheduled and conducted.

**Completing the Hiring Proposal and Closing Out the Search**

- **Complete Hiring Form:**
  - Move applicant to the status of “Recommended for Hire”
    - See above in “Updating Applicant Status and Submitting Interview Pools for Approvals” for more detail on adjusting applicant status.
    - Open requisition, go to “Applicant” tab
    - Put check next to potential offeree(s)
    - Select the grayed “Actions” button above “(Actions)” column, and choose “Move in Workflow”
    - Choose the “Recommended for Hire” status and save
  - Start Hiring Proposal
    - Click on hired applicant’s name to open the application
    - In the upper right hand side of the application are some action items, choose the green button, “Start Hiring Proposal”
    - Complete all of the appropriate fields on the hiring form
    - Save Hiring form, then choose “Take Action on Hiring Proposal” orange button and selecting option to submit to HR

- **All non-hired applicants must be moved to an inactive status (“Interviewed, Not Hired” or “Not Interviewed, Not Hired”).**
- **Move requisition to the status of “Offeree Selected.”**
Diversity Initiative

The President's Employee Diversity (http://www.ohio.edu/president/archives/empdiversity.cfm) provides direction for the composition of final interview pools and recruitment efforts. The initiative directs that:

1. For full-time presidential appointments, there must be at least one candidate from an underrepresented group in each interview pool or the search will not be approved by the Dean, Vice President or planning unit head.

2. All searches for permanent full-time presidential appointments must be national, show innovation, exhibit creativity, and reflect an aggressive effort to recruit qualified persons from underrepresented groups as a part of the process employed or the search will not be approved by the Office for Institutional Equity. Requests for exceptions to this standard must be approved by the Dean, Vice-President, or planning unit head prior to submission to the Office for Institutional Equity.

What this means is, each of our final interview pools should contain at least 1 diverse individual. To do this, we need to make our postings open, accessible, and competitive for individuals from traditionally underrepresented groups (women, minorities, veterans, and the disabled).

To accomplish this, hiring managers and the HR Liaison will work together to identify creative yet efficient and reasonable strategies to accomplish this task. Efforts might include:

- Advertising with professional organizations in the field of hire (listservs, websites, newsletters).
- Identifying affinity groups (within or outside of professional organizations) that target the aforementioned underrepresented groups. These groups may have listservs, websites or publications we can use. If there aren't any formal means of advertising within these groups, sometimes an email to the webmaster or group leader can be very productive. Simply ask the webmaster or leader if they are able to forward an email to their group members. This is effective and efficient!
- Tap into our student-centered groups on campus that have a tie to diversity. Again, you could ask the leader of the group to send emails out to alumni alerting them of a potential opportunity.
- Ask faculty and staff with your department to send out the posting to diverse contacts and groups with which they may have contact. Word of mouth can be just as effective as an advertisement in The Chronicle, sometimes!
- Utilize a simple tagline in advertising such as: Women, minorities, veterans, and those with disabilities are highly encouraged to apply. Sometimes, just stating the obvious will help potential applicants feel more welcomed and comfortable with applying!
Opportunity Hires

Forms and information about the Opportunity Hire Policy can be found on the Office of Diversity and Inclusion Website: [http://www.ohio.edu/diversity/opportunity.cfm](http://www.ohio.edu/diversity/opportunity.cfm)

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**Opportunity Hire Policy**

Ohio University believes a climate that represents and embraces different cultures enhances an institution's ability to provide its students with relevant experiences to successfully compete and achieve in an increasingly diverse and complex society. To bring about this climate, Ohio University provides support through the Opportunity Hire Fund to employ highly qualified individuals who make unique contributions to the University and its community. Such individuals specifically include those who bring a unique or different perspective because of their personal or professional backgrounds, interests or expertise; partners of current or prospective University faculty and staff who themselves have talents that match the needs of the organization; and those with national or international stature.

Opportunity hires are most often used to hire candidates for faculty positions. However, this hiring practice may also be used to fill professional and administrative staff positions. This fund is not specifically intended to support individuals in the Dual Career Network. However, positions are occasionally funded for spouses/partners to assure hires in line with the opportunity hire policy. University Human Resources (UHR) maintains a Dual Career Network designed to help recruit partners in networking and locating employment opportunities in the Athens area ([http://www.ohio.edu/hr/employment/dual_career.cfm](http://www.ohio.edu/hr/employment/dual_career.cfm)).

Ideally, opportunity hire funding is best situated for departments/planning units that do not have a funded faculty/administrative line but have identified a highly qualified individual that adds some measure of diversity to their department. The new position must fit within the unit's strategic plan for growth or to replace lost capacity. Opportunity hire funding is only a bridge to permanent funding so the hiring authority must be able to demonstrate how the position will be funded fully within two to three years.

**Funding Guidelines**

Opportunity hire funds are available to phase in appointments, which are eventually supported through department college base budgets. Financial support may be requested for one to three years. A common model over three years is to have the share of opportunity hire funding decrease as the base budget for the position increases. Exceptions to declining support can be made for less than three years of funding. The recommended declining support model is as follows:

- **Year one:** 100% of funding
- **Year two:** 75% of funding
- **Year three:** 50% of funding

Funds may be used to support a one-year appointment, such as a Teaching Fellow or a Visiting Professor (Group III or IV), if the appointment meets relevant criteria of the opportunity hire program. If individuals supported through this fund leave the University, any future opportunity hire funds committed for said individuals revert to the original pool.
The criteria for evaluating these requests include:

- Justification for resolving current and future faculty/staff workload demands
- Impact of the hire on Vision OHIO and institutional goals
- Position alignment and fit within the strategic and budgetary priorities of the college and/or department
- Degree to which college/department funds support the position over time
- Qualifications of the individual proposed

Procedure
The appropriate hiring authority must contact the Vice Provost for Diversity, Access and Equity to discuss the feasibility of opportunity hire requests before formally submitting the paperwork, which includes the opportunity hire Request form, the curriculum vita of the individual under consideration, and a clear plan for how the position fits within the strategic and budgetary priorities of the college or department with details for incorporation into future base funding. The appropriate Dean or planning unit head must sign the opportunity hire request. The Vice Provost for Diversity, Access and Equity will forward recommendations to the Provost or President, who approves the appointment.

Important Note: Approval of opportunity hire funding does not fulfill the requisition process. If the vacancy to be filled is a new position, the process of filling it begins with the creation of a job description that clearly defines the duties and responsibilities of the position, and the skills and abilities needed for a successful placement. An essential position request form must be completed and submitted to the President’s office and either appropriate Job Documentation needs to be approved by the appropriate planning unit head and submitted to University Human Resources for review and assignment of classification and pay grade to complete the process. Please reference the UHR website for more details (http://www.ohio.edu/hr/tools/vacancy.cfm).
Checking References and Background Checks

Reference Checking

Checking references is a crucial part of the employment process. At minimum, Hiring managers should check references for the final offeree before an official offer extended. This might mean extending an offer letter with the terminology “This offer is contingent upon successful completion of a reference check”.

For Faculty positions, departments are highly encouraged to use the Automated Reference Letter feature within PeopleAdmin. Please see page 13 for details.

For Staff positions, the hiring manager may check references anytime throughout the hiring process. For the sake of treating all applicants the same, the hiring manager should decide at which point they would like to check references during the process and check the references provided by all applicants that were pushed through to that particular stage.

For example, the hiring manager might:

- Check references for all applicants at the beginning of the search and utilize the information as a pre-screening tool (Recommended for small searches).
- Check references for only the candidates selected for the final interviews (Recommended for large searches).
- Check reference for only the final offeree (Recommended in time-sensitive or special circumstances only).

Some very useful examples of questions to ask during the background check can be found at:

http://www.ohio.edu/hr/tools/upload/Reference_check_questions.doc

Background Checks

Although not required, University Human Resources offers a Background Check service through our partners at HireRight.

Departments should seriously consider this as an option to ensure the safety of our Students, Co-Workers, Campus Community, and university resources. Usually, Background Checks are completed on only the final offeree and a conditional statement is placed in the offer letter such as: “Offer contingent upon successful background check”.

Please ask the HR Liaison about background checks if you are interested.