Professional & Scientific Requisition and Search Process - CHECKLIST

This checklist covers all information needed to create a requisition and complete the search process.

Basic Position Information	
	Get **position approval** from DEO/Provost/Accounting. Create **position number** and/or Sr. HR Leader moves into OTAC for advertising.
	Local job description (LJD) including classification, position #, % time, working title, KARs, job duties, universal and technical competencies needed for this position. May update and attache Org Chart.
	External advertisement: Recommended to be a shortened version of the basic position info (unit paragraph, position overview paragraph, advertising info (date, req. #, website, and EEO tagline)).
Notes:	

Advertising Information	
	Position qualifications: required and desired education qualifications, written as competencies, directly related to the job duties and/or technical competencies within the LJD.
	Salary range (i.e. base to commensurate, base to salary cap (if budget/equity known)). Best practice: include the true range (low to high) dept. is willing to pay to set appropriate expectations of interested candidates. *Cannot offer final candidate outside range advertised.* http://hr.uiowa.edu/professional-pay/structure-a
	Additional information to intro position posting (i.e. dept. mission, Why UI)
	Reference to competency proficiencies in posting (link/hyperlink to website with description and definitions). http://hr.uiowa.edu/competencies (Admin includes)
	Include instructions for full LJD (i.e. email Admin) – *posting does not usually include all position details.*
	Additional Application Materials: note regarding reference check step (5 requested at later step in process); optional: work samples or other additional application request.
	External advertising: commonly posted on Corridorcareers.com and Higheredjobs.com (free). Do you need external posting for underrepresentation of women or minorities? Must post to at least one site focused on diversity outreach toward that/those group(s). http://diversity.uiowa.edu/advertising-resources
	Determine search members: 5A and below only require the *Recruiter* (HR Rep) and *Search Chair* (hiring mgr. or designee). Interviewers provide input but not an official part of the committee. Pay level 6A and above require *full search committee* (typically 5 people, including content expert and appropriate campus constituents.
Notes:	

After Position Begins Advertising	
	Post external advertisements (Search Administrator).
	Screen applications Plan how (use competency behaviors, screening worksheet) and when (as they come in/after advertised). Schedule 1st meeting of search members (just before or after position ends advertising). Login to Self Service, OTAC system, to view applicant materials.
	Determine interview options: Are phone/email screens needed to clarify qualifications for any candidates? Are preliminary/phone interviews (informal) needed to further narrow the pool to the list of finalists? Would preliminary reference checks help in decision making at this step? OR Are top candidates clear and known and request to interview can begin?
	Complete the **screening worksheet** and/or write a **summary of the applicant pool** showing who meet all the required qualifications (and within this group, what desired quals they meet) and who does not meet all the required quals (including which quals are not met). Identify who are the top candidates to request 2nd/final interviews. Must rate all applicants. HR saves in records.
	Develop interview questions. Review the qualifications/competencies – use behavior based questions tied directly to the advertised qualifications. Identify how to measure answers/**evaluate** interviewees.

Notes:	

After Approved to Interview	
	Schedule interviews. AFTER the request to interview is approved by the Recruiter, contact the selected interviewees to schedule interviews (may include presentations, forums etc.).
	Conduct interviews. Ensure fair and consistent practices by the interviewers and search members regarding same, legal, appropriate questions and evaluation. Complete interview evaluations.
	Discuss and evaluate final candidates. Based on candidate application materials, qualifications, interviews and evaluations (& possibly reference checks), determine the top and if applicable, secondary candidate for the position.
	Conduct reference check(s). If not already done in a previous step, the Recruiter may enter the top candidate(s) info into SkillSurvey online to begin the reference check process. Once at least 3 references are received the report is viewable however, it's recommended to wait until all references have responded.
	Document a Search and Selection (S&S) summary. Written justification/rationale for why the committee selected the candidate of choice in contrast to the other finalists interviewed. Determine salary to offer and any other hire considerations. Once Recruiter approves, move to offer.

Notes:	

After Approval to Offer	
	Make the offer. A verbal offer can be extended to the candidate of choice. If salary negotiations stay below median zone max of the applicable pay range, please note in appt. If they go above, <u>Comp & Class must approve first</u> (provide justification for review). If considering <u>moving expenses</u> include a repayment agreement. Once terms are agreed, the Recruiter triggers the eOffer in OTAC workflow for approval and then extends via the system to start the onboarding process.
	Notify the applicant pool. Once the eOffer is complete, contact applicants who were not chosen for the position (OTAC email). Best practice: phone call those applicants who were *interviewed*.
	Move to the *appointment* process with the new-hire including onboarding and orientation steps. ***Search is not complete and **closed** until the incumbent's first day of work**.
Overall Search Notes:	

*If no viable candidate is determined during the interviews and the rest of the pool is not viable for a second round of interviews, options include: re-advertise the position as-is (no changes to qualifications/position description) for a minimum of one week, close and submit a new requisition with updates to the qualifications/position description), or consider it a failed search and Search Admin must email UHR to close it unfilled.

Recruitment Manual through EOD. P&S Search Checklist through EOD.
Admin – see Checklist for Submitting a P&S Requisition for more details on creating the LJD and submitting the requisition.