This Search Plan User Guide a supplement to the AP Recruit User Guide.

What You Need to Know Before You Start

The Analyst’s Role
As Analysts, you create and manage the recruitments for your departments. Among the many tasks, you appoint roles to committee members, solicit approvals in order to publish the recruitment, assemble the advertising plans, view and manage the applicant files, and perform required reporting. You may assign editors to help you with certain aspects of the recruitment, but it is always assumed that you will oversee your editors and offer them the assistance they need from the training you have received.

This guide is designed for analysts who already have experience using Recruit. There will be two parts in this guide/tutorial: (1) The Search Plan and (2) Managing the Search

AP Recruit Log In
To access Recruit you must have a UCR NetID. If you have never activated your UCR NetID, instructions are available at http://cnc.ucr.edu/NetID/obtaining.html. You must also have an assigned role. For question or assistance regarding AP Recruit roles, please contact your College/School/Unit Recruit Analyst (http://cnc.ucr.edu/aprecruit/contacts.html) or the AP Recruit support team at aprecruit@ucr.edu.
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PART 1 – THE SEARCH PLAN CHECKLIST

Step 1: Enter and Create Search Plan (pages 7-10, AP Recruit User Guide)
   a. Move to the Recruitment page by clicking Recruitments in the top menu bar
   b. Click the button, Create New Recruitment Plan
   c. Read the Basic Overview page and click the Next button
   d. Enter the following under Information
      i. *Recruitment Name – the recruitment name should match the ad
      ii. Description – this refers to the position description and is displayed to applicants. This is where the EEO tagline must be entered along with the diversity and advancement statement from the PEVC/VPAP memo dated March 20, 2015: Additions to Advertisements
      iii. Approved Search Area – this refers to the area for which the FTE was approved
      iv. *Department – if this is a cross-listed position, contact support at aprecruit@ucr.edu with subject line: “Request for Cross-Listed Position”
      v. *Academic Year – this refers to the academic year that the search begins. Note: This cannot be changed once it is entered.
      vi. Salary Control# – leave this blank (previously this was used to enter the RP#)
      vii. Salary Range – enter the salary range here
      viii. Rank/Step – enter the rank/step here
ix. *Applicant Submission Dates – there are 2 options: Open/Close/Final (OCF) and Initial Review Date (IRD).

✓ OCF: this refers to a one-time search that will complete when the vacant spot is successfully filled.
  o Open Date – when applicants can begin applying. Open dates remain editable by the analyst at any time. All recruitments must be open for at least 30 days.
  o Close Date – when new applicants are no longer accepted. The Close date will be locked once the Search Plan is approved in order to help ensure that the close date remains true to the advertisement(s).
  o Final Date is the deadline allowing existing applicants to modify their files. This date must be greater or equal to the Close date. Final dates remain editable by the analyst at any time.
  o All completed applications are viewable to the search committee, regardless of Close or Final dates.

✓ IRD: this refers to a long-running search in which pools of applicants are collected and evaluated separately at different times. Choose if you think a candidate might be chosen before the recruitment closes. Choose for “pool” recruitments when there will be multiple people hired. Recruit informs applicants that in order to receive full consideration by the committee, they must complete by a specific review date. **Note: For this option once the recruitment is posted, the Initial Review Date cannot be changed —this is designed to keep the advertisement and submission dates in sync.**
  o The first Initial Review Date marks the closing of the first pool of applicants.
  o After the current review date has passed the analyst may create additional review dates in order to capture a separate pool of applicants.
  o The last date when applicants can apply is the Final date. If the analyst creates an additional review date that is after the Final date, the Final date will automatically be moved forward to accommodate it.
  o Applicants may apply before the Final date, even if there is no upcoming review date. In this case, they will be informed that their application may or may not be considered.

x. *Search Information – includes Search Breadth and Initial Search
  o Search Breadth: Is this an open/general search or a targeted/specialized search? An example of a general search is a recruitment for the Department of Chemistry regardless of area of specialty. An example of a targeted search is a recruitment for a Biological Chemist whose research focuses on cell membranes.
  o Initial Search: Is this position newly allocated or is it being re-listed from a previous academic year?
xi. Optional Information Link – provide the URL if this recruitment is advertised on your school or department jobs website and Recruit will display the link to applicants when they apply.

e. Enter the Title Codes – Academic Title Codes map directly to salary scales and the codes that are input into this field must reflect the wording in all advertisements for the recruitment. Type a title code in the box. Or, type part of the name, for example, “Prof.” The system will provide a menu of title codes to select. There is no limit on the number of title codes. Click the ‘x’ to remove a title code.

f. Enter the Specialties – all applicant pools must be compared against national availability averages. Specialties are used when generating the applicant pool reports, a core feature of Recruit. Start typing a specialty into the box. The system will provide a menu of specialties to select. You may select up to 5 specialties. Click the ‘x’ to remove a specialty. If you cannot find a specialty needed: Specialties with smaller availability numbers are purposely folded into larger ones so if you can’t find what you’re looking for, choose a more general category.

g. Enter Contact and Notes – enter the contact information for the recruitment. This provides the primary contact information for the recruitment and will be seen by applicant (with the exception of Internal Notes).

h. SAVE the basic search plan information – click Save and Done when you have entered all the information and reviewed it for accuracy. The information may not be edited once the plan is approved and published.

The basic particulars are done but you will need to configure it further. If you are ready to input the required document and reference information, choose Yes, Configure for Online Applicant Management in the confirmation box. Or you can stop here and configure this at a later date.

*Mandatory AP Recruit fields

**Step 2 – Configure for Online Applicant Management (page 11, AP Recruit User Guide)**

Online Applicant Management Components

a. Documents – enter the document requirements for the recruitment. You can:
   - Add: Define any additional documents, make them required or optional, and add a description.
   - Reorder: Adjust the order in which the requirements are listed for the applicants.
   - Edit: Change the name of a document, add a description, and switch it from required or optional.
   - Delete: Remove a document from the requirements.

b. Reference – you may choose to have your applicants provide self-solicited reference letters OR reference contact information with their application OR nothing at all. Refer to the Academic Hiring Toolkit for guidelines.

**Note:** After an applicant has applied to this position, you cannot change reference requirements or required documents, but you may add optional documents if you need to collect additional data from applicants.
c. Email Settings – enter the “Help” email, and “From” email for applicants. This is the address where questions from applicants will be directed.

d. Set-up the Reference Thank You email – is a fully customizable template that Recruit sends to references after their letters of recommendation are uploaded into the system.

e. SAVE the online applicant management information – click Save and Done when you have entered all the information. **Note: The information may not be edited once the plan is approved and published.**

**Step 3 – Enter Search Plan Details and Components** (page 14, **AP Recruit User Guide**)

Enter the Recruitment/Search Plan Components

a. Diversity – this section includes the following:
   - Specialties and Benchmark Data: lists the recruitment’s specialties and the corresponding national availability data that is provided via the UC Office of the President to Recruit.
   - Pool Diversity: This table enables search committees charged with ensuring a diverse applicant pool to better perform that task.
   - Affirmative Action Goal: Identify the affirmative action goal for the title series in the campus academic affirmative action plan by indicating which groups are underutilized on the campus for the specific job grouping.
   - Equity Advisors: The name(s) of the department and/or school Equity Advisor that has been designated by a Recruit administrator will appear here. If not designated, this area will be blank.
   - Equity advisor role: Use this field to write a description of the role the above stated equity advisor will play in this search.

b. Advertisements – this section is for all documentation related to advertising. Committee chairs, editors, reviewers, and approvers can view this section and analysts can edit the section. Chairs and editors can also edit the Search & Recruitment Effort fields and upload ad documents. This section includes the following:
   - Planned Search and Recruitment Efforts: This section is to describe all planned efforts to reach a broad and inclusive applicant pool.
   - Actual Search & Recruitment Efforts: Return to this field later to enumerate all efforts taken to reach a broad and inclusive applicant pool. This information is required to generate all of the recruitment’s reports.
   - Ad Documents: Upload your ad drafts and final ad copy here. Files must be a PDF, TXT, or an image. The comments field may be used in any way that may be helpful for your approvers.
   - HERC Categories: Select a HERC category to ensure the best visibility for your job posting in HERC (Higher Education Recruitment Consortium).
   - Ad Sources: Simply list the various places where your recruitment will be advertised.
   - Ad Evidence: For OFCCP (Federal audits), copies of actual ads will be needed. This information should be included in the recruitment’s Search Report.
Return to this area when you can provide proof that an advertisement was placed.

- Ad sources must be entered in order to upload evidence. Choose your ad source from the drop-down menu. Navigate to your file on your computer, optionally describe the file and add a comment if you want. Then click Upload file.
- Search Sources: This hard-coded list corresponds to the choices on the applicants’ diversity surveys. As applicants submit their surveys, the number of responses displayed here will change dynamically, assisting you in your outreach efforts.

c. Qualifications – This section is to document the qualifications required of an applicant and should be reiterated in all advertisements for the position. Approvers and committee reviewers can view this section. Analysts, chairs, and editors may add/edit it. **Note: These fields are not editable after the Search Plan has been approved, effectively restricting the ability to retroactively change the recruitment’s goals to suit a particular candidate.**

d. Selection Process – this section is for analysts, chairs, or editors to document the job related criteria and the committee’s plan for the selection of candidates. Approvers and reviewers have read (not write) access. This section includes:
   - Selection criteria: This area is to provide a detailed description of the selection criteria to be used in evaluating candidates in priority order.
   - Selection plan: Document how the search committee will evaluate the applicants and select the shortlist and finalist (Phone interviews, in-person interviews, etc.)

e. Committee – this section is where analysts assign committee roles on a recruitment-by-recruitment basis so when the members log into Recruit, they will have the proper access to recruitment and applicants. Any committee member and approver named in the search plan can view this section but only analysts may add/edit members. Additional Chairs, Additional Editors, Additional Reviewers are technically not part of the committee, but may be called in to help review the applications. They have the same access rights as their counterparts.

f. Documentation – this section is for analysts, chairs, or editors to archive and retrieve various materials associated with the recruitment. Accepted file types: Files must be PDF, TXT, or images.

g. Disposition Reasons – under the Disposition Reasons tab, you will find a complete list of all of the system-wide disposition reasons available for your committee’s use. Note that “Other Please Specify” should not be used on our campus. If you have a custom reason that your department would like to use then you will need to have it approved via (Affirmative Action, Academic Personnel and Campus Counsel) prior to entering it in the system. For more information, send an email to affirmativeaction@ucr.edu.
Step 4 – Submit the Search Plan for Approval (page 25, AP Recruit User Guide)

Click Submit Plan for approval after you provide all necessary information based on your search business practices.

An approval workflow has been created by the Recruit Administrator from APO (see sample, Figure 1). If you do not see an approval workflow (see Figure 1), contact support at aprecruit@ucr.edu with the subject line: Request for Approval Workflow”. If the approval workflow is inaccurate, click on “Cancel”, do not submit for approval, and contact support at aprecruit@ucr.edu with the subject line: “Request for Correction on Approval Workflow”. You may submit the plan for approval after the workflow has been corrected.

If the approval workflow is accurate, click on “Yes, Submit for Approval”. You will still need to assign specific people to Department and College/School/Unit roles (see Figure 2).

Figure 1 – Approval Workflow
AP Recruit sends automated (system-generated) email notifications to approvers. Approvers will not be notified twice for the same request. The department analyst in charge of the recruitment monitors approvals in progress and comments. Remember to follow the sequence of the approval workflow.

Approver’s emails include a direct link to the approval screen where they may download the plan, comment, and approve. For more information refer to Approver’s User Guide.

Once a role has approved the plan, there is no re-approving it for that role. In other words, if your Dean has approved the plan and then you make a change, Recruit does not provide a way for you to resubmit the plan for approval to the Dean a second time.

Your own department’s business practices should dictate when it is prudent and necessary to edit information that has already been approved and/or published, just as you would in a paper process.

Monitor your approvals. Click the Approval link at the top of your Recruit window.

**Step 5 – Publish the Recruitment** (page 28, AP Recruit User Guide)

After all the required approvers have approved the Recruitment/Search Plan, you may publish the recruitment. Remember, recruitments cannot be published until the recruitment/search plan is approved.

✓ Once all steps are approved, a Publish button will appear at the top of the Details screen.
Once published, the recruitment becomes available to applicants to apply and to the search committee for review. The PDF of the plan is now an historical record of what was approved. Once published, applicants will able to apply (providing the open date has arrived).

PART II – SEARCH PLAN APPROVAL & NOTIFICATION GUIDELINES

A. Responsibility and Oversight
   1) College/School/Organization
      ✓ Recruit analysts must monitor their approvals. Click the Approval link.
      ✓ If 2 business days have passed after your Dean has approved the Search Plan and the system does not show that the Search Plan has been approved by OFSAA, then send an email to affirmativeaction@ucr.edu and include the following information in the email notification: JPF#, Plan Year, Rank/Position and Department [offline process].
      ✓ If 2 additional business days have passed after OFSAA has approved the Search Plan and the system does not show that the Search Plan has been approved by the Vice Provost for Academic Personnel (VPAP), then send an email to aprecruit@ucr.edu and include the following information in the email notification: JPF#, Plan Year, Rank/Position and Department [offline process].
   2) OFSAA (turnaround time is 2 business days; for exceptional requests, allow additional time)
      ✓ The Search Plan is reviewed by OFSAA in AP Recruit.
      ✓ For questions or requests for additional information, OFSAA will leave a comment in AP Recruit and follow-up with an email notification [offline process] to the Recruit Analyst. Supporting documents and/or changes to the plan must be uploaded under the Documentation section of AP Recruit.
      ✓ Once the Search Plan is approved by OFSAA, AP Recruit will send a system-generated email notification to VPAP.
   3) APO (turnaround time is 2 business days; for exceptional requests, allow additional time)
      ✓ The Search Plan is reviewed by the VPAP in AP Recruit.
      ✓ Once the Search Plan is approved by VPAP, the APO Administrative Analyst will send an email notification to the Recruit Analyst with a copy to Kim Gentile (ISC), Cindy Williams (RPB), affirmativeaction@ucr.edu, and aprecruit@ucr.edu [offline process].
      ✓ Note: Notifications for approved Search Plan(s) will be sent daily (Monday-Friday excluding holidays) after 4pm. Recruit Analysts may also view approvals via AP Recruit at any time. Once your Search Plan receives final approval from the VPAP, you may publish your Recruitment Plan per the Open date.

B. Managing Approvals for Approvers
Click here for managing approvals for approvers:
PART III – RESOURCES

A. Websites
1) AP Recruit Production site: https://aprecruit.ucr.edu/
2) AP Recruit Training site: https://aprecruit.ucr.edu:48918/
3) AP Recruit Information: http://cnc.ucr.edu/aprecruit/
4) UCI Project Site and Recruit Updates: http://sites.uci.edu/ucrecruit/about-recruit/

B. Contact Information
1) College/School/Unit: http://cnc.ucr.edu/aprecruit/contacts.html
2) Academic Personnel Office: Antonette Toney, Sara Umali, Theresa Wimbley – aprecruit@ucr.edu
3) Office of Faculty and Staff Affirmative Action: Erica Jiang, Brittnee Agosto – affirmativeaction@ucr.edu

C. UCR Recruitment Guidelines
1) Academic Hiring Toolkit
2) Affirmative Action Recruitment Guidelines
3) Search Committee Guidelines and Checklist
4) Pooled Recruitment Guidelines
5) Cluster Hire Guidelines (contact aprecruit@ucr.edu)

D. AP Recruit User Guides
1) AP Recruit Training Page: http://cnc.ucr.edu/aprecruit/training.html

Thank you for using the AP Recruit system. If you have any questions, please contact your College/School/Unit Recruit Analyst (http://cnc.ucr.edu/aprecruit/contacts.html) or the AP Recruit support team at aprecruit@ucr.edu.