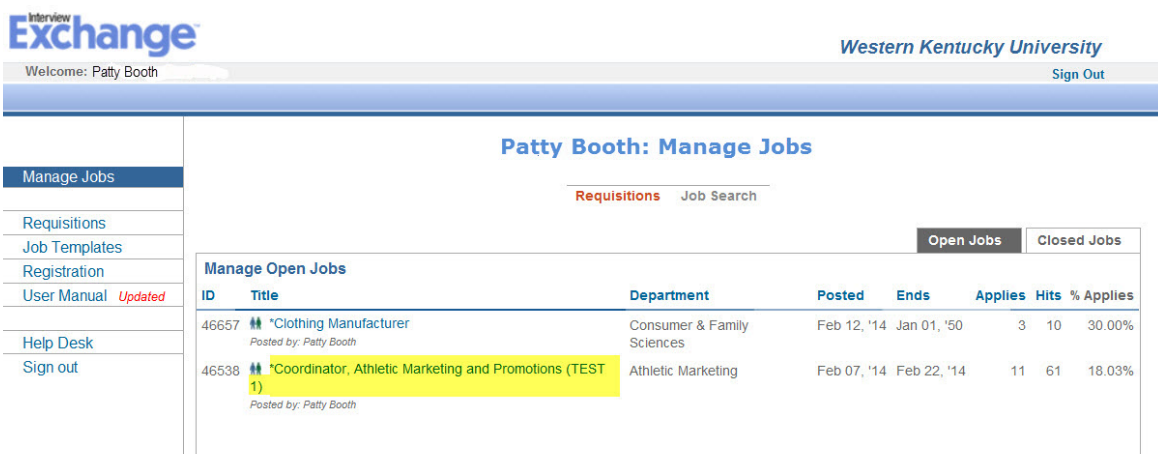
Processing a Faculty Applicant Pool in Interview Exchange

LOG IN

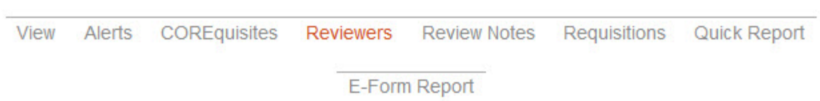
Using Internet Explorer, access Interview Exchange at https://sso.interviewexchange.com/wku/sso.jsp. Login with your NetID and password.

MANAGE JOBS

After a successful login, the Interview Exchange Console/Dashboard will appear on your screen. “Manage Jobs” is the default menu choice; “Open Jobs” is the default tab selection. Only those jobs assigned to you will appear on your dashboard. Closed jobs can be accessed by clicking the “Closed Jobs” tab. If you are unable to see a particular job, contact your office associate and request to be given access to the job. It is the responsibility of the Office Associate/Coordinator in your area to establish access to the job for the Search Committee.



Click the title of any job to display a toolbar containing time saving tools to help you process your applicant pool as well as a list of applicants who have applied for the job. The toolbar is displayed in the screenshot below:



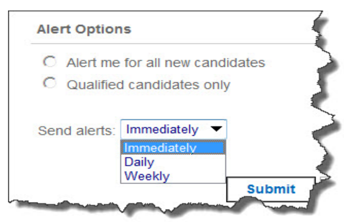
TOOLBAR OPTIONS

View

Click “View” on the Job Toolbar to see the advertisement as it was displayed to the applicant. The view option also includes the “Apply URL”. This is the internet link to your posting which can be sent to applicant sources if desired. From the “View” option, you can also see any notes that have been recorded by the Search Committee.

Alerts

Interview Exchange will allow Hiring Officials and members of the Search Committee to begin evaluating the applicant pool as soon as applicants apply. To receive an email each time a candidate applies, click the **Alerts** link in the toolbar at the top of the page. By default, this function is turned off but the options available allow you to specify preferences that will generate an email each time someone applies. You can specify the types of candidates about which you wish to be alerted and the frequency of notification.



COREquisites **(Comprehensive Occupational Requirements Evaluator)**

This OPTIONAL feature presents questions to applicants which are based on the required qualifications as they are listed in the position announcement. Applicants who answer all COREquisites “YES” are viewed under the “Qualified” tab on the shortlist. Applicants who answer at least one of the COREquisites “NO” are viewed under the “All Applicants” tab. This optional questionnaire which can include up to 10 questions, serves as a screening tool and is helpful in identifying qualified applicants as opposed to unqualified job seekers. The questions address specific skills, experience, and education judged to be essential to job success. They are created during the posting process by staff in Human Resources working in conjunction with the Search Committee Chair or Hiring Official. Clicking the **COREquisites** link in the toolbar reveals the questions which appear in the position announcement.

Reviewers

Click the “Reviewers” link to see the list of all who have access to view this job. Those who have access are assigned a “permissions level” of either “Hiring Manager” or “Reviewer”. The permissions level assigned is associated with options that are available as described in the “Processing Applicants” section below.

Review Notes

Review Notes is a feature which allows search committee members to communicate one with another. It also allows the committee chair to communicate with HR. Review Notes generated from the shortlist will pertain to the job in general. Notes generated from an applicant’s screen will pertain to that specific applicant. Accessing this option from the toolbar will allow you to see all activities which have transpired since the job was posted.

Requisitions

The **Requisitions** link displays a table containing a list of all requisitions that are associated with this job.

Quick Report

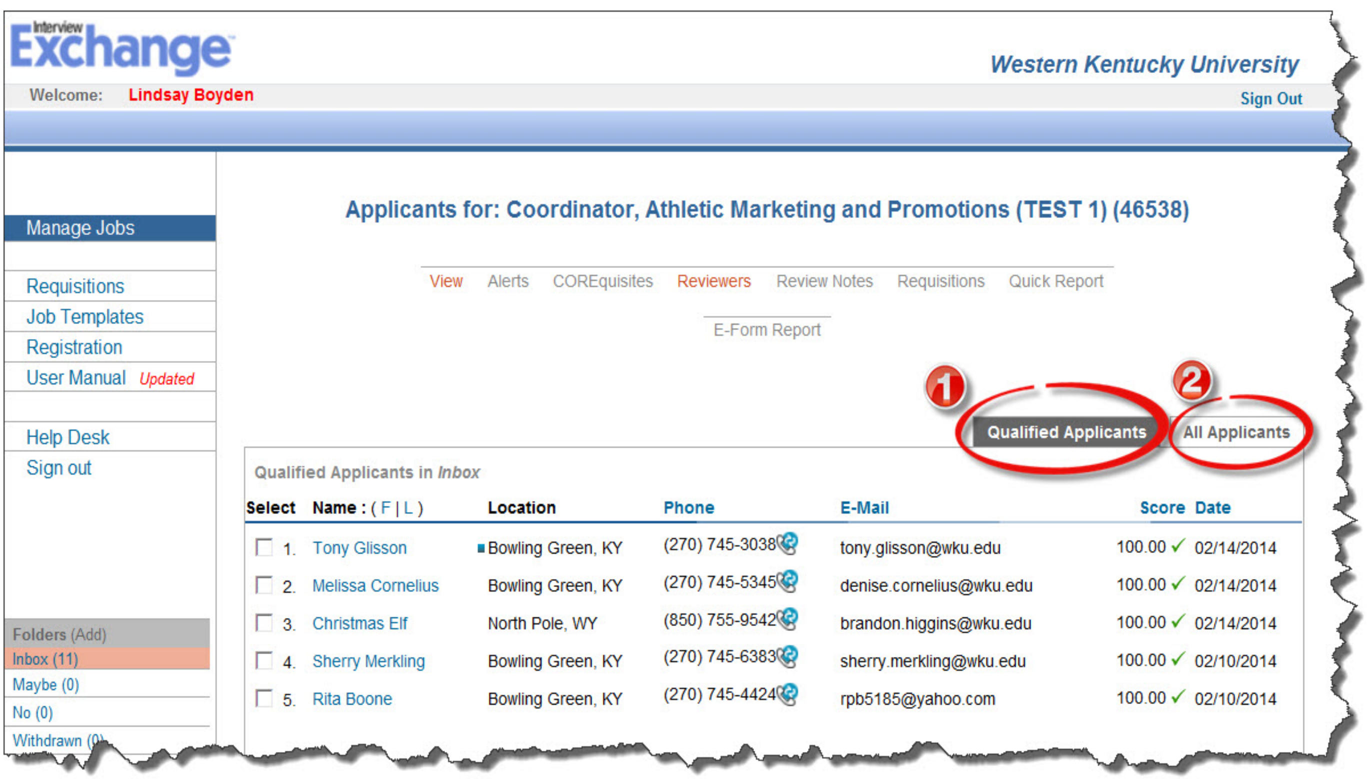
The **Quick Report** link allows the user to create a report which can either be shown on the screen or downloaded into Excel. Clicking **Quick Report** displays a list of options related to the applicants that are available to be selected and included in the report. This option is helpful in order to create a list of all applicants or selected groups of applicants.

PROCESSING APPLICANTS

Faculty positions generally remain “open” until the position is filled. An open position remains posted to the HR website and applicants can continue to apply until the position is moved to “closed” status.

THE SHORTLIST

To access a list of applicants who have applied for particular job, click the title of that job from the “Manage Jobs” screen. The list of applicants shown is known as the “ShortList”. Two tabs labeled “Qualified” and “All Applicants” appear on the top right corner of the ShortList as shown below:



-  contains applicants who answered all “Must Have” COREquisites “Yes”
-  contains all applicants regardless of answers to COREquisites

Those applicants listed in the “Qualified” tab are also listed in the “All Applicants” Tab. The applicants that appear on the screen correspond to the tab that is currently selected.

Clicking a name in the ShortList accesses the Applicant Screen from which a person with ***Reviewer*** permissions can:

- view all documents submitted i.e., CV, letter of interest, examples of work, etc.
- access links to electronic forms that were uploaded during the application process
- view answers to the COREquisites
- record notes about the candidate

In addition, a person with ***Hiring Manager*** permissions will be able to:

- email the candidate a question
- record interview dates and times for interviewees
- record the hire date of the successful candidate
- log a disposition for the candidate and list strengths/weaknesses

CONTACTING THE APPLICANT

At times you may wish to contact a particular applicant or group of applicants for various reasons. A person with ***Hiring Manager*** permissions can communicate regarding the progress of a search or to send a “regrets” notification to a particular group of individuals. You may need to contact an applicant who has failed to submit a document or who has failed to complete a part of the application process.

Applicants can be contacted one of two ways. If the question can be answered without uploading documents or attaching additional information, scroll to the bottom of the applicant screen and type your question in the “Ask this Candidate a Question” box. Submitting the question will generate an email to the applicant which contains a link and instructions to access their WKU Career Account. The applicant will see the question, type a response in the answer field and click “Submit”. This generates an email to the person who sent the question notifying them that an answer has been submitted. The answer provided by the applicant will appear on that individual’s applicant screen.

If you want to send the question to multiple applicants or if the response requires the attachment of a document, then use the “Send an Email” feature. This is accessed under the “Move to:” menu at the top right hand side of the applicant screen. From the email screen, you may either use the sample email templates or compose your own email.

INCOMPLETE APPLICATION

If the faculty profile appears to be incomplete, click “Mark as Incomplete” in the Electronic Form box. Then, using the email function described above, send the applicant an email to notify him/her of the need to log back in to their account and complete the faculty profile. Marking the application “incomplete” resets the faculty profile so the applicant can access and edit it. This feature is not available to users with ***Reviewer*** permissions.

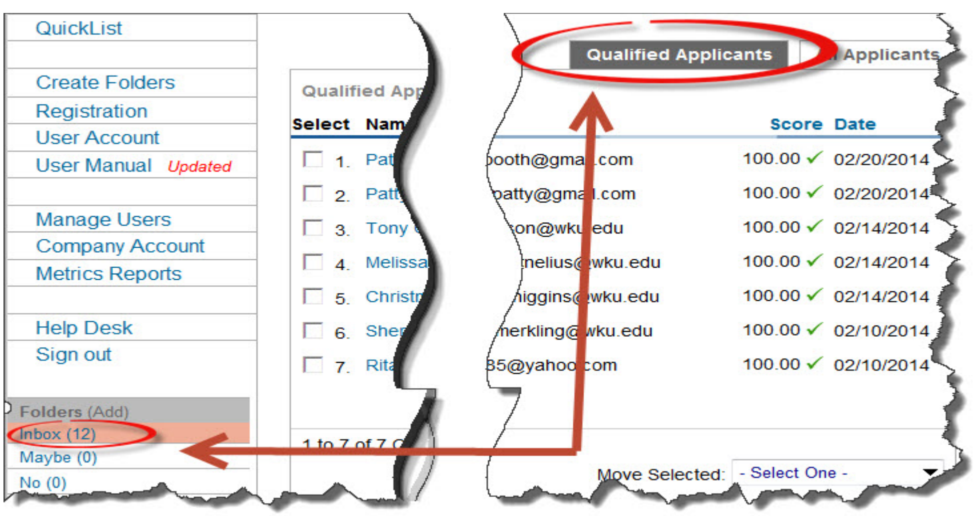
NOTES FROM REVIEW TEAM

All members of the Search Committee, have the ability to document their evaluation of each applicant by using the “Add a Note” feature in the “Notes from Review Team” field near the bottom of the applicant screen.   By default, these notes are marked “Public” meaning they are viewable by anyone who has been given access to that job. Optionally, notes may be marked “Private” meaning they are viewable only to the author of the note and HR. Notes may be deleted by the author and/or HR.

MOVING APPLICANTS TO FOLDERS

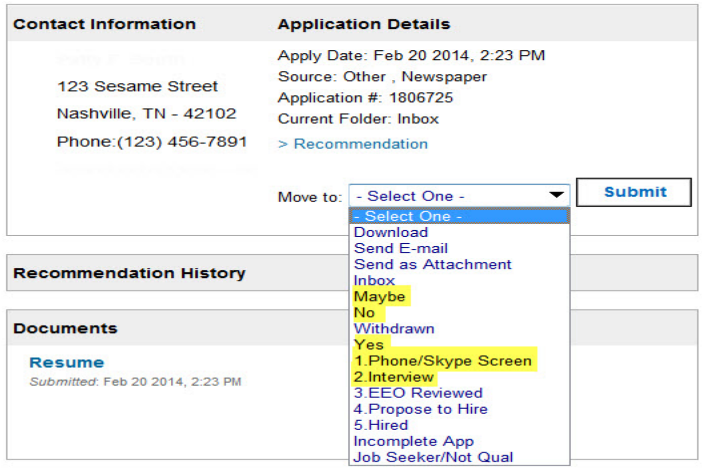
Applicants are contained within a set of folders that appears on the lower left side of the Shortlist screen. All applicants start out in the Inbox folder and they will remain in that location until a user with ***Hiring Manager*** permissions evaluates and moves the applicant to another folder which indicates the committee’s interest in that applicant. There is no limit to the number of times an applicant can be moved from one folder to another. Use the ***YES, NO*** and ***MAYBE*** folders as temporary holding spots for applicants until you decide who you want to Screen or Interview.

Ensure that the Qualified Applicants tab is highlighted and the Inbox folder is selected as shown in the screenshot on the next page:



Go to the applicant screen for the first applicant on the list by clicking on the candidate’s name.

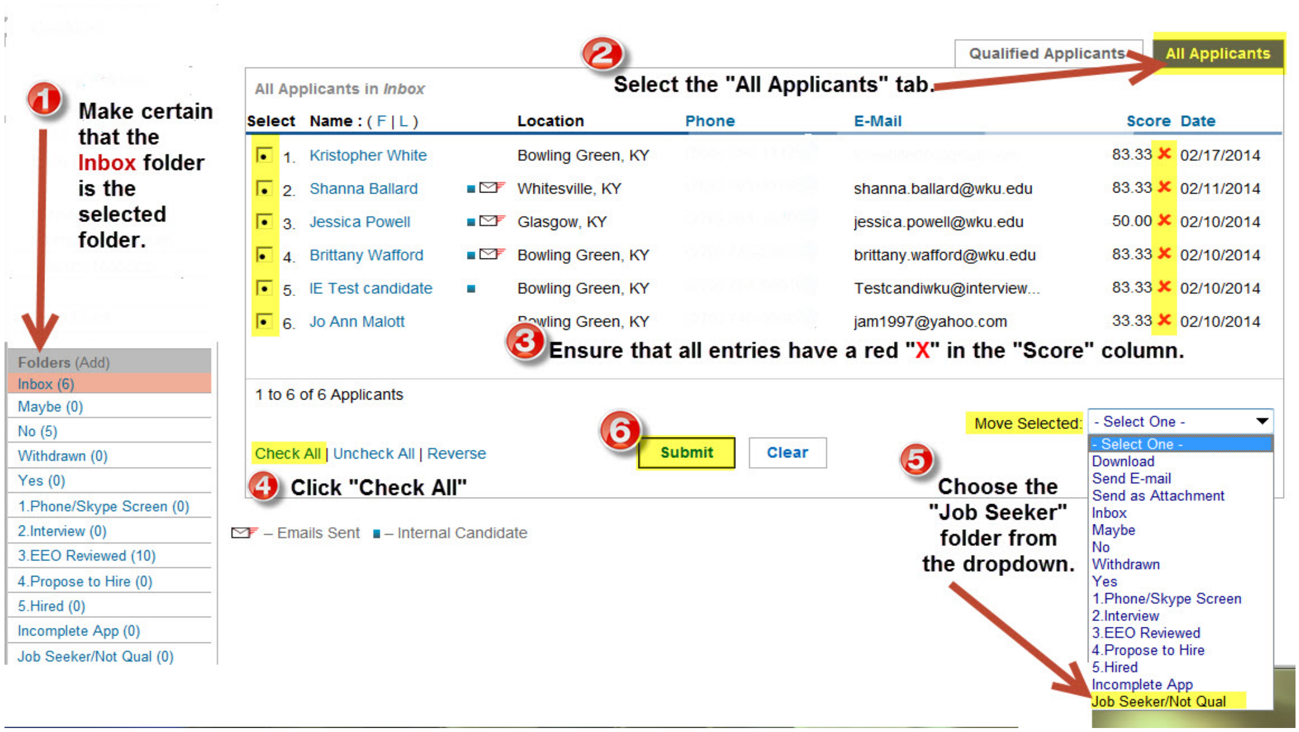
After reviewing all application materials submitted, the faculty profile, and notes from the reviewers and based on your level of interest at that time, move the applicant to the appropriate folder by clicking on the “Move to:” field as highlighted in the screenshot below. Select one of the highlighted folder names as shown in the screenshot below based on your current or future interest in that applicant as a qualified candidate.



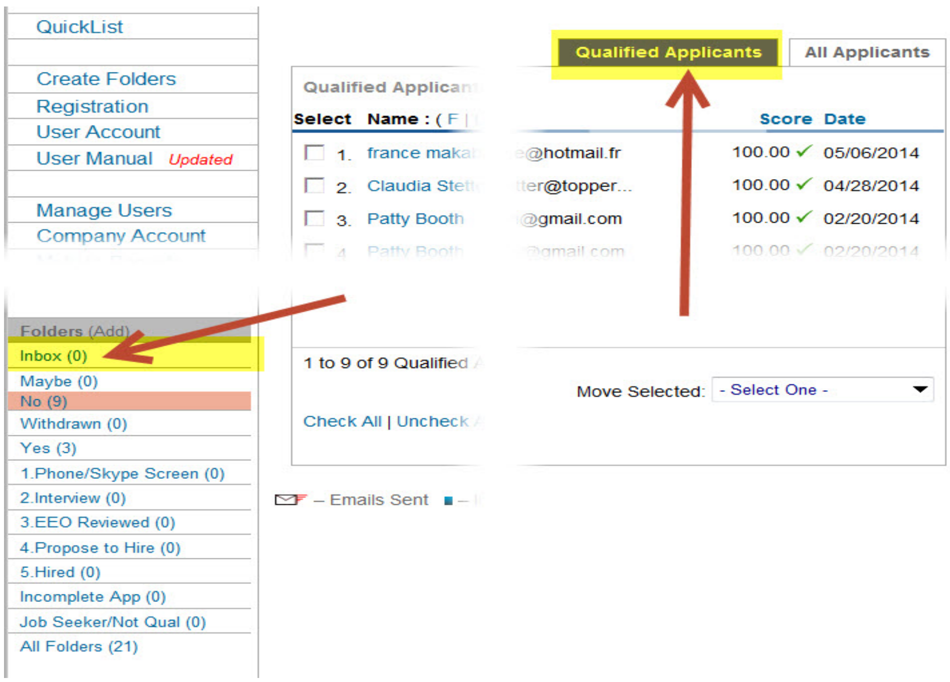
Click "Submit" and then "Next" at the top right corner of the screen. Continue this process until all applicants in the ShortList under the "Qualified" tab have been moved to an appropriate folder.

JOB SEEKERS

Click on the "All Applicants" tab to reveal the ShortList of those individuals who are classified as "Job Seekers". By definition, a Job Seeker is an individual who applies for a position and, based on the answers given to the COREquisite questions, is deemed to lack at least one minimum qualification as specified in the job posting. Such an applicant will have a red ***X*** in the "Score" column of the ShortList. Follow steps 1-6 shown in the screenshot below to move all Job Seekers to the ***JOB SEEKER*** folder. If COREquisites are not used, there will no applicants labeled as JOB SEEKERS.



After moving the Job Seekers to the "Job Seeker" folder, there should be a zero in the parentheses next the ***Inbox*** folder.

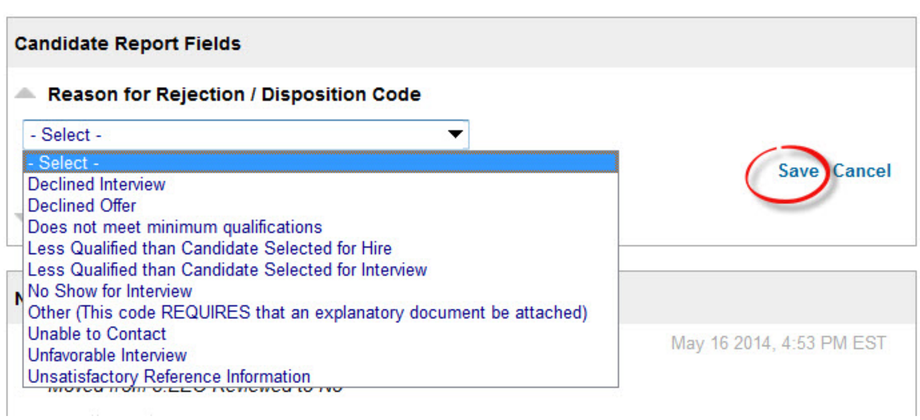


SUPPLEMENTAL APPLICANTS

At the end of the search, you may notice that additional applicants appear in the Inbox folder. If a Hiring Proposal has already been created at that point, you may move those remaining applicants into the "Supplemental Applicants" folder.

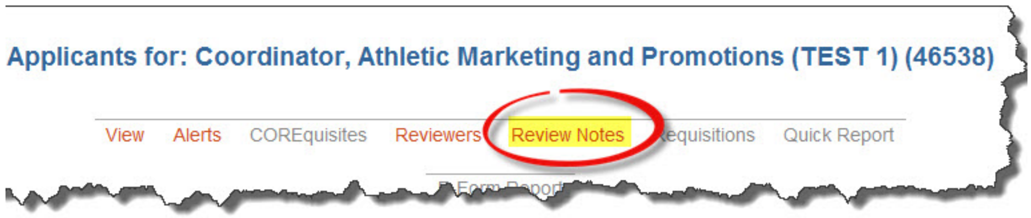
REASONS FOR REJECTION/DISPOSITION CODE

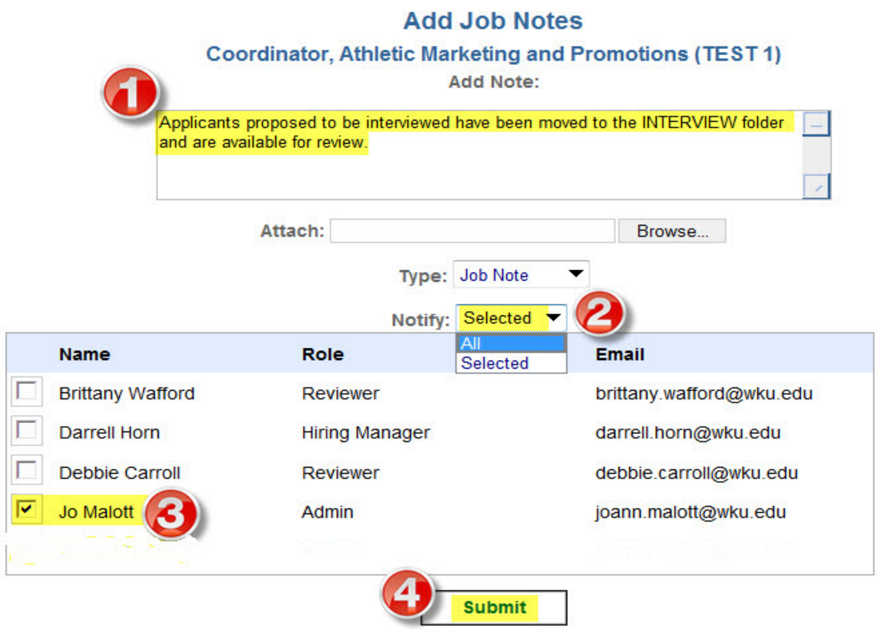
This feature is available only to those with ***Hiring Manager*** permissions. As illustrated in the screenshot above, highlight the **Qualified Applicants** tab and select the ***NO*** folder. Click on the candidate's name to access the applicant screen. Scroll down to the "Candidate Report Fields" to record a Reason for Rejection/ Disposition Code for that individual. Continue assigning an applicable code for each applicant in the ***NO*** folder. If the code you choose is "Other", access the text box labeled "Strength & Weaknesses/Justification" directly beneath the code field and enter an explanation regarding why you chose the "Other" reason.



INTERVIEW PROCESS

After all applicants have been reviewed and moved to the appropriate folder, and ensuring that all candidates that you want to interview are in the ***Interview*** folder, notify the department head by clicking on the "Review Notes" feature in the toolbar at the top of the screen above the ShortList. Scroll to the bottom to the "Add Job Notes" field. Follow steps 1-4 below to send the email directly to the department head.





Clicking "Submit" will generate an email to the department head.

If the department head approves of the candidates in the Interview folder, the department will notify Lawrence Snyder with a "review note" following the instructions above. If Lawrence Snyder approves of the candidates, the Dean will notify Jo Ann Malott with a review note that the candidates are approved.

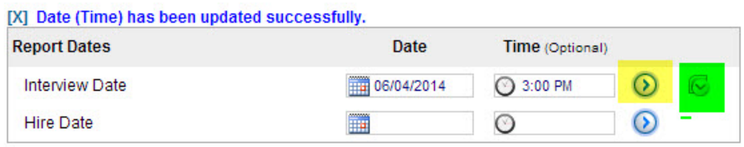
HR will evaluate the work that has been completed on the applicant pool up to this point. Attention will be given to ensure that:

- all applicants who self-identified as minorities and females are fairly evaluated and considered
- an appropriate Reason for Rejection code has been selected for all applicants in the "No" folder

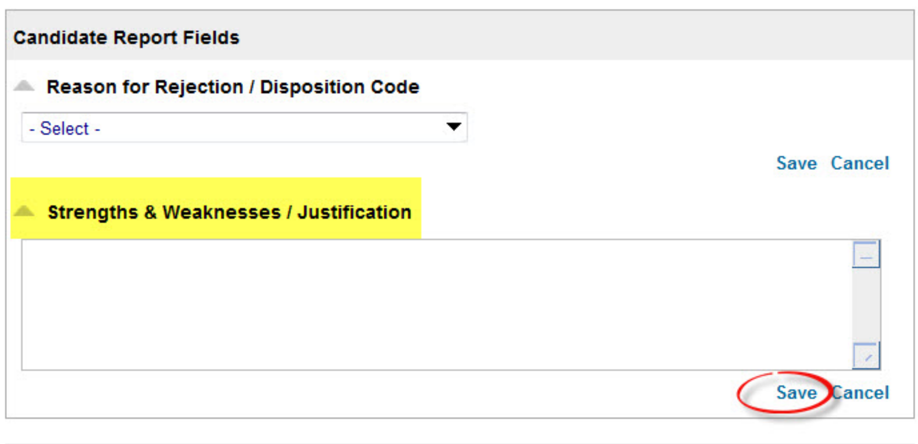
Once applicants to be interviewed have been reviewed, the Search Committee Chair will be notified that interviews can be scheduled. Prospective interviewees will now appear in the "EEO Reviewed" folder.

NOTE: *Do not schedule interviews until you receive notification to do so.*

Once interviews are scheduled, record the dates and times of the interviews in the "Report Dates" field on each applicable applicant screen. To save the date and time, click the arrow highlighted in yellow as shown in the screenshot below. To create an Outlook meeting invitation to send to the members of the search committee, click the Outlook icon which is highlighted in green below.

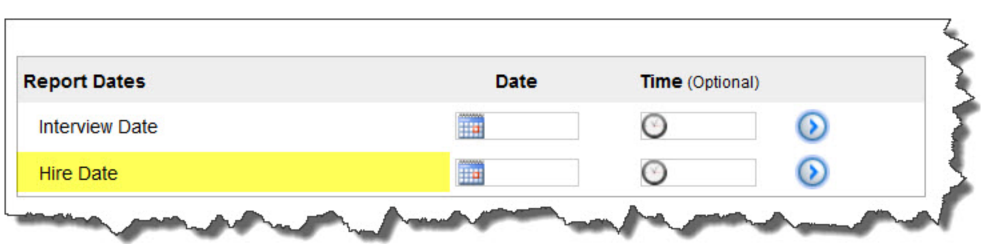


As interviews are completed, use the "Candidate Report Fields" to record a Reason for Rejection/ Disposition Code for each person interviewed except the individual proposed for hire. You must also include justification for a disposition code of "Other" in this field. In addition, you must record a list of Strengths and Weaknesses for each candidate interviewed.   The Strengths and Weaknesses are logged as free form text in the field that appears below the disposition codes.



HIRING PROPOSAL

Once the Search Committee Chair has completed Strengths and Weaknesses for those candidates who were interviewed, the Hiring Official should be notified using the Review Notes feature. At that time, the Hiring Official will review the work of the Search Committee and make a hiring decision. The Hiring Official should move the successful candidate to the "Propose to Hire" folder. Again using Review Notes, the Office Associate/Coordinator should be notified to complete a Hiring Proposal. Once the Hiring Proposal is approved, the Hiring Official will be notified by the Office Associate/Coordinator. At this point, the offer of employment can be extended. Once the employment offer is accepted, the Hiring Official should move the successful candidate to the "Hired" folder and record the Hire Date in the "Report Dates" field as shown:



FINAL DETAILS

The Search Committee Chair should go back to review the contents of each folder and ensure that every candidate, other than the candidate hired, has been assigned a Reason for Rejection / Disposition Code. Candidates whose application materials are in the "Yes", "Phone/Skype Screen", "Interview" or "EEO Reviewed" folders should remain in those folders. Do not move them to the "No" folder.

NOTIFY UNSELECTED CANDIDATES

Candidates appreciate knowing where they stand in terms of employment in job searches. A professional, thoughtful and kind communication lets them know. Whether you prefer to make personal contact with the individuals via a phone call or if you prefer written communication via mail or email, it is imperative that the Search Committee Chair follow up with each candidate that was not selected to be hired. Interview Exchange provides two template regrets emails, one for candidates who were interviewed and another for candidates who were not interviewed. To access and utilize the templates, follow these steps:

- Click on the electronic folder called "All Folders" and choose the "All Applicants" tab
- Click "Check All" and then deselect the applicant who was hired as well as those applicants who were interviewed since they will receive a different email
- From the "Move Selected" dropdown, choose "Send Email" and click "Submit"
- Click Sample Mail Templates
- Choose the appropriate template pertinent to the situation and recipients listed and click "Select". You may edit the text if you wish.
- Click the radio button next to "This email message does not require a response."
- Check the box next to "Check this box when you are ready to send"
- Click "Send Email"
- Repeat these steps for the applicants who WERE interviewed choosing the applicable template for interviewed candidates.

If you wish to contact the applicants outside the Interview Exchange email system, please "Add a Note" at the bottom of the applicant's screen denoting that you did contact the person to inform them that another applicant had been hired.

REVISED: October 22, 2015