

Processing a Staff Applicant Pool in Interview Exchange

LOG IN

Using Chrome or Firefox, access Interview Exchange by going to MyWKU and selecting Interview Exchange from the menu or by clicking this link:

<https://www.interviewexchange.com/moduleredirect.jsp>

MANAGE JOBS

After a successful login, the Interview Exchange dashboard will display a list of jobs to which you have access. "Open Jobs" is the default tab selection. Jobs no longer posted appear under the "Closed Jobs" tab. If you are unable to see a particular job, contact your Human Resources.

Interview Exchange
Welcome: Patty Booth Sign Out
Western Kentucky University

Patty Booth: Manage Jobs

Requisitions Job Search

Open Jobs Closed Jobs

ID	Title	Department	Posted	Ends	Applies	Hits	% Applies
46657	**Clothing Manufacturer <small>Posted by: Patty Booth</small>	Consumer & Family Sciences	Feb 12, '14	Jan 01, '50	3	10	30.00%
46538	**Coordinator, Athletic Marketing and Promotions (TEST 1) <small>Posted by: Patty Booth</small>	Athletic Marketing	Feb 07, '14	Feb 22, '14	11	61	18.03%

Click the title of any job to display a list of applicants who have applied for the job. At the top of the screen, you will also see a toolbar (see screenshot below) containing time saving tools to help you process your applicant pool.

View Alerts COREquisites Reviewers Review Notes Requisitions Quick Report
E-Form Report

TOOLBAR OPTIONS

View

Click "View" on the Job Toolbar to see the applicant's view of the advertisement. The view option also includes the "Apply URL" which can be sent to prospective applicants or referral sources as desired.

Alerts

Interview Exchange allows Hiring Officials and Search Committee members to begin evaluating the applicant pool as soon as candidates complete the application process. To receive an email each time a candidate applies, click the “Alerts” link in the toolbar at the top of the page. By default, no alerts are sent when candidates apply but the options available allow you to specify preferences that will generate an email each time another candidate is added to the applicant pool, if desired.

Applicants for: **Coordinator, Athletic Marketing and Promotions (TEST 1) (46538)**

View Alerts COREquisites Reviewers Review Notes Requisitions Quick Report
E-Form Report



The image shows a screenshot of the 'Alert Options' dialog box. It contains two radio button options: 'Alert me for all new candidates' and 'Qualified candidates only'. Below these is a 'Send alerts:' label followed by a dropdown menu with three options: 'Immediately', 'Daily', and 'Weekly'. A 'Submit' button is located at the bottom right of the dialog box.

COREquisites

COREquisites are questions presented to applicants during the application process and are reflective of the required qualifications listed in the position announcement. This feature serves as a screening tool and is helpful in identifying qualified vs. unqualified job seekers. The questions address specific skills, experience, and education judged essential to job success. Applicants who proved a “YES” answer to all COREquisites appear under the “Qualified” tab on the shortlist. Applicants who answer at least one of the COREquisites “NO”, will appear under the “All Applicants” tab. Clicking the COREquisites link in the toolbar reveals the questions asked in the application process.

Reviewers

Clicking “**Reviewers**” in the toolbar will reveal a list of all individuals who have access to view the activities of the search. All of the members of your search committee should be in the list as well as the Hiring Official and others who have been given access for administrative purposes. If there is a checkbox in the “Select” column to the left of an individual’s name, that individual does not have access to the search.

Review Notes

Clicking **Review Notes** reveals a free form text box where anyone with access to the search can post a note/comment that can then be seen by all Reviewers. It is the main communication tool for all activities related to the search and allows search committee members to communicate one with another or 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 displays a list of every note or action saved.

Requisitions

The **Requisitions** link displays a table containing a list of all requisitions that are associated with this job. Click on the title of the requisition to open it in a new window. Only requisitions that you originated or requisitions on which you were named as an approver will appear.

Quick Report

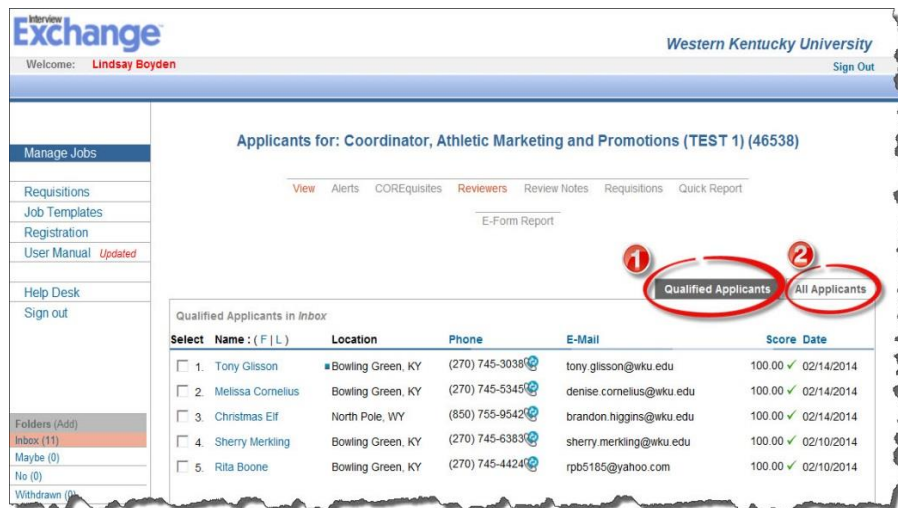
The **Quick Report** link allows the user to create an Excel spreadsheet that displays a list of options related to the applicants that are included in the report. This option is helpful in order to create custom lists of applicants. The report is available as a screen display if preferred.

PROCESSING APPLICANTS

The Search Committee Chair makes the decision to close a position and remove it from the website. When it is determined that the applicant pool is sufficient, the Search Committee Chair should submit a Review Note to HR requesting that the position be closed. If it is necessary to reopen the position, simply submit a request via Review Notes to HR at any time.

THE SHORTLIST

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



- **1** contains only applicants who answered all COREquisites “Yes”
- **2** contains all applicants regardless of answers to COREquisites

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 also 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

A Hiring Manager can electronically communicate with the applicant from within the system using one of two methods provided:

1. Use the “Ask this Candidate a Question” box: Use this method if the answer to the question does not require uploading documents or attaching additional information. Scroll to the bottom of the applicant screen and type your question in the box indicated. Submitting the question will generate an email to the applicant that 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”. The person who sent the question will then receive a notification. The answer provided by the applicant will appear on that individual’s applicant screen.
2. Use the “Send an Email” feature: Use this method if you want to send the question to multiple applicants or if the response requires the attachment of a document. Access this feature by pulling down on the “Move to:” menu at the top right hand side of the applicant screen and choosing “Send Email”. From the email screen, you may either use the sample email templates or compose your own email.

INCOMPLETE APPLICATION

If an application appears to be incomplete, then 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 application. Marking the application “incomplete” resets the application so the candidate can access and edit it. This feature is only available to users with **Hiring Manager** permissions.

NOTES FROM REVIEW TEAM

Search Committee members should 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. The author can delete or edit notes.

MOVING APPLICANTS TO FOLDERS

Applicant information is contained within a set of electronic folders that appears on the lower left side of the Shortlist screen. All applicants start out in the **INBOX** folder. In order to move an applicant to another electronic folder, click “Move to:” as shown in the screenshot below and select the destination folder.

Contact Information	Application Details
123 Sesame Street Nashville, TN - 42102 Phone: (123) 456-7891	Apply Date: Feb 20 2014, 2:23 PM Source: Other , Newspaper Application #: 1806725 Current Folder: Inbox > Recommendation
	Move to: - Select One - <input type="button" value="Submit"/>
Recommendation History	
Documents	
Resume <small>Submitted: Feb 20 2014, 2:23 PM</small>	<ul style="list-style-type: none">- Select One -DownloadSend E-mailSend as AttachmentInboxMaybeNoWithdrawnYes1. Phone/Skype Screen2. Interview3. EEO Reviewed4. Propose to Hire5. HiredIncomplete AppJob Seeker/Not Qual

Click “Submit” and then “Next” at the top right corner of the screen.

Using the “Notes from Review Team” documentation, the Search Committee will evaluate each applicant. The Chair will sort the applicants to the **YES**, **NO** and **MAYBE** folders based on the committee’s level of interest pursuing that applicant. As the evaluation process is refined, applicants can be moved between folders as many times as necessary but an applicant will only appear in one folder at a time. Move Interviewees to the **PHONE/SKYPE SCREEN** or **INTERVIEW** folder as appropriate. Continue moving all applicants from the **INBOX** folder until it is empty.

JOB SEEKERS (Not Qualified)

View “Job Seekers” by clicking on the “All Applicants” tab. By definition, a Job Seeker is an applicant who applies for a position and, based on the answers given to the COREquisite questions, self reports 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.

1 Make certain that the **Inbox** folder is the selected folder.

2 Select the "All Applicants" tab.

3 Ensure that all entries have a red "X" in the "Score" column.

4 Click "Check All"

5 Choose the "Job Seeker" folder from the dropdown.

6 Submit

Select	Name : (F L)	Location	Phone	E-Mail	Score	Date
<input type="checkbox"/>	1. Kristopher White	Bowling Green, KY			83.33 X	02/17/2014
<input type="checkbox"/>	2. Shanna Ballard	Whitesville, KY		shanna.ballard@wku.edu	83.33 X	02/11/2014
<input type="checkbox"/>	3. Jessica Powell	Glasgow, KY		jessica.powell@wku.edu	50.00 X	02/10/2014
<input type="checkbox"/>	4. Brittany Wafford	Bowling Green, KY		brittany.wafford@wku.edu	83.33 X	02/10/2014
<input type="checkbox"/>	5. IE Test candidate	Bowling Green, KY		Testcandiwku@interview...	83.33 X	02/10/2014
<input type="checkbox"/>	6. Jo Ann Malott	Bowling Green, KY		jam1997@yahoo.com	33.33 X	02/10/2014

1 to 6 of 6 Applicants

Check All | Uncheck All | Reverse

Submit Clear

Move Selected: - Select One -

Download
Send E-mail
Send as Attachment
Inbox
Maybe
No
Withdrawn
Yes
1. Phone/Skype Screen
2. Interview
3. EEO Reviewed
4. Propose to Hire
5. Hired
Incomplete App
Job Seeker/Not Qual

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

QuickList

Create Folders
Registration
User Account
User Manual *Updated*
Manage Users
Company Account

Folders (Add)
Inbox (0)
Maybe (0)
No (9)
Withdrawn (0)
Yes (3)
1. Phone/Skype Screen (0)
2. Interview (0)
3. EEO Reviewed (0)
4. Propose to Hire (0)
5. Hired (0)
Incomplete App (0)
Job Seeker/Not Qual (0)
All Folders (21)

Qualified Applicants | All Applicants

Select	Name : (F L)	Score	Date
<input type="checkbox"/>	1. france makal...@hotmail.fr	100.00 ✓	05/06/2014
<input type="checkbox"/>	2. Claudia Stett...ter@topper...	100.00 ✓	04/28/2014
<input type="checkbox"/>	3. Patty Booth...@gmail.com	100.00 ✓	02/20/2014
<input type="checkbox"/>	4. Patty Booth...@gmail.com	100.00 ✓	02/20/2014

1 to 9 of 9 Qualified

Check All | Uncheck

Move Selected: - Select One -

REASONS FOR REJECTION/DISPOSITION CODE

INTERVIEW PROCESS (Approval Required)

CHECKING REFERENCES

The Applicant Screen contains a References section that displays the names and phone numbers of the individuals whom the applicant listed as professional references. Contact referees by at least one of the methods described below:

- Contact the referee using the contact info provided and record the information in Review Notes.
- Click “Request Candidate for References” (highlighted in yellow below) to send an email to the applicant inviting them to request that their reference providers confidentially submit a letter of reference via the online system. A trigger is contained within the email that will then send an email from the applicant to the referee inviting the referee to submit a confidential reference on behalf of the applicant. The reference provided by the referee will show up as a link on the Applicant Screen.
- Click “Request Directly” (highlighted in green below) to send an email directly to the referee inviting them to submit a confidential reference on behalf of the applicant. The reference provided by the referee will show up as a link on the Applicant Screen.

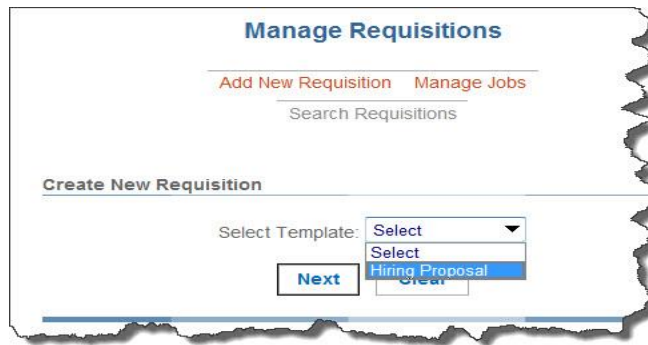
References ?			
Request Candidate for References			
Mickey Mouse	mickey@disney.com	Not Sent	--
> Request Directly	555-584-4582		
Donald Duck	donald@disney.com	Not Sent	--
> Request Directly	555-584-4832		
Porky Pig	porky@disney.com	Not Sent	--
> Request Directly	555-584-5782		

HIRING PROPOSAL (Approval Required)

The final step in the process is completion of a Hiring Proposal. This is generally prepared by the Hiring Official or their designee. From the ShortList, click on the name of the candidate proposed for hire. From the Applicant Screen, select the “Recommendation” link as shown in the screenshot below:

Contact Information	Application Details
Rita P. Boone 850 Wilkinson Trace #143 Bowling Green, KY - 42103 Phone: (270) 745-4424 rpb5185@yahoo.com	Apply Date: Feb 10 2014, 9:27 AM Source: Other , Western Kentucky University Application #: 1796705 Current Folder: Inbox > Recommendation

This provides a link to the Hiring Proposal:



The highlighting on the screenshot shown on the next page indicates the fields required to be completed.

After clicking “Save Changes” on the Hiring Proposal, complete the Approval Queue as shown in the screenshot below. Based on the “Approver Title” listed, enter the name of the appropriate individuals to approve the Hiring Proposal. Hardcoded names cannot be overridden. If a particular title is not applicable to your Hiring Proposal, simply leave it blank. Include approvers whose title does not appear in the blank spaces that will generate the proper approval order.

****IMPORTANT**** Click “SAVE” before clicking “Send for Approval”.

Once the Hiring Proposal has been submitted, move this candidate to the “Propose to Hire” folder.

Requisition Approvers: .

[Manage Requisitions](#) [View Requisition](#) [Printable Version](#)

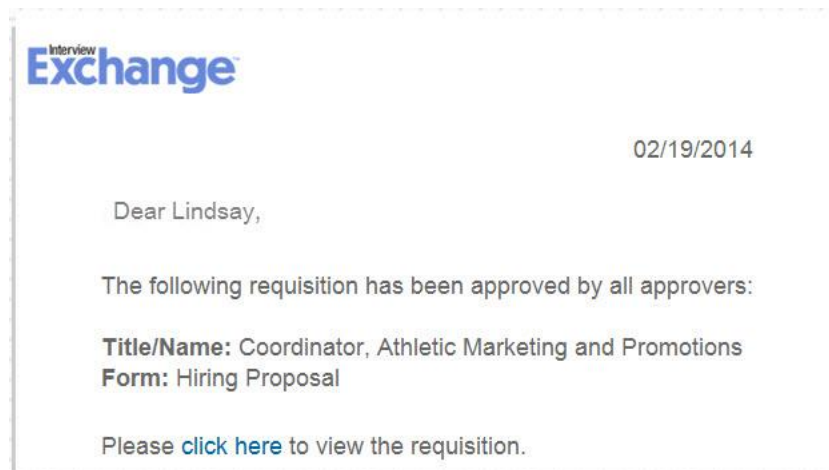
Approver	Approver Title	Approval Status
Jo A Malott	Human Resources Employment	
Amber Scott	Human Resources Compensation	
-- Select --	Department Head/Director	
-- Select --	Vice President	
-- Select --	Academic Affairs	
-- Select --	Senior Division Administrator/VP	
Jo A Malott	Human Resources Employment	
-- Select --		

Save

Cancel

Send for Approval

The originator of the Hiring Proposal will receive email notification from Interview Exchange when the Hiring Proposal has been approved by all approvers. Upon receipt of that email, the offer of employment can be extended.



If the offer is rejected, go back to the **EEO REVIEWED** folder to select another candidate to whom an offer can be made. Following the instructions above, create a Hiring Proposal for that individual. Proceed with the offer once that proposal is approved. Repeat this process until a candidate is hired or until the search is declared failed.

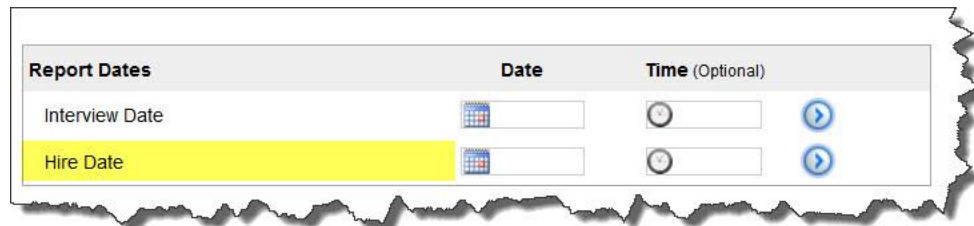
BACKGROUND CHECK and EPAF

Once the employment offer is accepted, create the EPAF and initiate the Background Check using this form:

<https://intranet.wku.edu/php/prod/Forms/BCR1.php>

The requestor and the individual named in the “Notify” section of the form will receive a notification when the Background Check is complete. Move the successful candidate to the “Hired” folder once the EPAF is approved.

Record the Hire Date in the “Report Dates” field as shown:



Report Dates	Date	Time (Optional)
Interview Date	<input type="text"/>	<input type="text"/>
Hire Date	<input type="text"/>	<input type="text"/>

FINAL DETAILS

- **ELECTRONIC FOLDERS**

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.** No candidates should remain in the “Inbox” or “Maybe” folders at the conclusion of the search. Ensure that every candidate, other than the candidate hired, has been assigned a Reason for Rejection/Disposition Code.

- **NOTIFY UNSELECTED CANDIDATES THROUGH INTERVIEW EXCHANGE***

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 you follow up with each candidate. 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 that contains the individuals you wish to notify.
- Click “Check All” located in the bottom left corner.
- 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.

***NOTE - If you wish to contact the applicants outside the Interview Exchange email system, please “Add a Note” at the bottom of the Applicant Screen denoting that you did contact the person to inform them that another applicant had been hired.**

REVISED: 10/10/2019