



THE RECRUITMENT DOCUMENT SUITE
MODULE 3



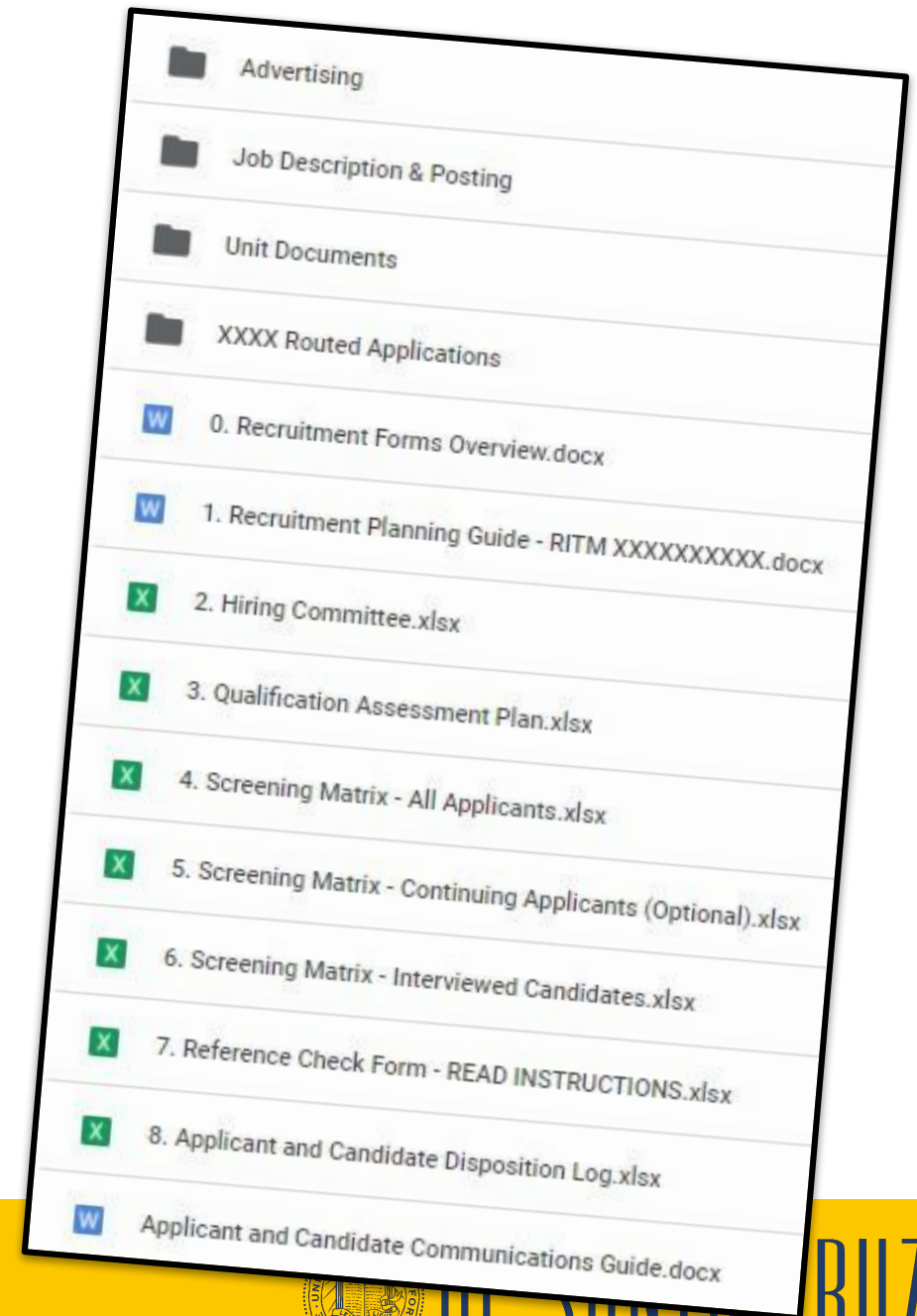
Recruitment Document Suite

- The **Recruitment Document Suite** (RDS) is a Google Drive folder containing a number of resources for the hiring committee designed to plan for and navigate through the screening process
- All routed applications will be stored in the Recruitment Document Suite
- The Recruitment Document Suite replaces the:
 - Screening Matrix
 - Applicant Selection Log
 - Candidate Profile
- The use of the Recruitment Document Suite is only for ***competitive recruitments***



Recruitment Document Suite

- Hiring@ucsc.edu manages the shared folder. A link will be provided to you when your job is posted
- When Talent routes your applications after the Initial Review Date (IRD), the application materials will be available in your folder
- Most of the documents are **required** **before** the hiring manager is able to ***share*** the **selected candidate** information with Talent Acquisition



0. Recruitment Forms Overview

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Recruitment Forms Overview

Overview of the Recruitment Document Suite
 This document provides a brief overview of the Recruitment Document Suite (RDS), which is the Google Drive folder that houses the forms you must use throughout your recruitment. The table below notes which forms are required and when they are due to Talent Acquisition.

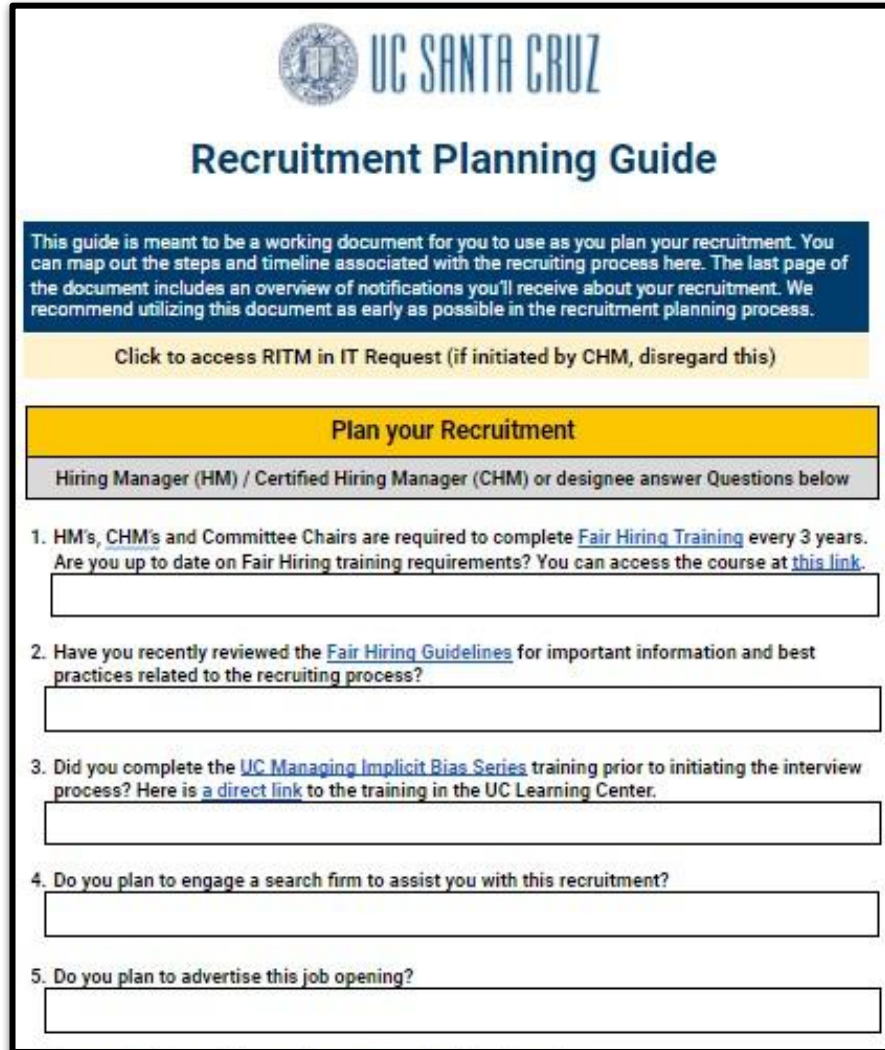
Below the table is a brief summary of each form in RDS, with links to detailed instructions.
It is imperative to read all instructions associated with these documents.

IMPORTANT NOTE:
 To interact with the forms in the RDS, you must open them with Google Docs or Google Sheets. Click the drop-down arrow above the document to 'Open with' Google Docs or Sheets. Your edits are always saved immediately.
EXCEPTION: To view applications, view in the browser or download rather than opening as a Google Doc. If opened as a Google doc, the formatting will be degraded and a duplicate will be created (which is annoying and possibly confusing).

SHR Forms (w/ links to Fair Hiring Best Practices)	Required?	Due to TA
1. Recruitment Planning Guide	Yes	before job offer
2. Hiring Committee	Yes	before job offer
3. Qualification Assessment Plan	Yes	before job offer
4. Screening Matrix - All Applicants	Yes	before job offer
5. Screening Matrix - Continuing Applicants	Only if there are multiple rounds of screening	before job offer
6. Screening Matrix - Interviewed Candidates	Yes	before job offer
7. Reference Check Form	Yes	before job offer
8. Applicant and Candidate Disposition Log	Yes	before job offer
Applicant and Candidate Communications Guide	No - for reference	not required
Materials & Communications generated BY UNIT	Required?	Due to TA
Applicant Communications	Yes	before job offer
Subsequent Materials Collected (writing sample, etc.)	Only if generated	before job offer

- This reference document provides a brief overview of each document in the suite and when they are required
- We've also provided a list of recruitment documents that the unit will initiate and save to the suite

1. Recruitment Planning Guide




The screenshot shows the top portion of a recruitment planning guide. At the top left is the UC Santa Cruz logo. Below it, the title "Recruitment Planning Guide" is centered. A blue text box contains introductory text: "This guide is meant to be a working document for you to use as you plan your recruitment. You can map out the steps and timeline associated with the recruiting process here. The last page of the document includes an overview of notifications you'll receive about your recruitment. We recommend utilizing this document as early as possible in the recruitment planning process." Below this is a yellow button that says "Click to access RITM in IT Request (if initiated by CHM, disregard this)". A yellow header bar reads "Plan your Recruitment". Below that is a grey bar with the instruction "Hiring Manager (HM) / Certified Hiring Manager (CHM) or designee answer Questions below". The form contains five numbered questions, each followed by a text input field:

1. HM's, CHM's and Committee Chairs are required to complete [Fair Hiring Training](#) every 3 years. Are you up to date on Fair Hiring training requirements? You can access the course at [this link](#).
2. Have you recently reviewed the [Fair Hiring Guidelines](#) for important information and best practices related to the recruiting process?
3. Did you complete the [UC Managing Implicit Bias Series](#) training prior to initiating the interview process? Here is [a direct link](#) to the training in the UC Learning Center.
4. Do you plan to engage a search firm to assist you with this recruitment?
5. Do you plan to advertise this job opening?

- The Planning Guide includes some questions that should be answered at the beginning stages of the recruitment
- There is also a checklist to use at each step of the process and an overview of recruitment related notifications in the new process
- **This document is required and must be completed by your unit before a job offer can be submitted**

2. Hiring Committee



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Hiring Committee

[Click HERE for detailed instructions](#)

Job Title: _____

Job Opening ID: _____

The hiring manager or designee should use this document to identify the members of your hiring committee.

INSTRUCTIONS: Identify each member of your hiring committee by name and department/division, as well as each member's committee role. [Click Here](#) for a list of common responsibilities for Chair and Committee Members.

REMINDER:

- Please refer to the [Fair Hiring Guide](#) for important guidance and information on hiring committee best practices. This training is mandatory for hiring managers.
- All Hiring Committee members are highly encouraged to complete the [UC Managing Implicit Bias Series](#) training prior to participating in the interview process.

Hiring Committee	Name	Department or Division	Responsibilities
Hiring Manager			
Hiring Delegate (if applicable)			
Certified Hiring Manager			
Committee Chair			
Committee Co-chair			
Committee Member			
Committee Member			
Committee Member			
Committee Member			
Committee Member			
Committee Member			
Committee Member			
Committee Member			
Committee Member			
Committee Member			
Committee Member			

- The Hiring Committee document defines the roles of the committee members
- The hiring manager or designee will enter the names and departments of the committee members in this document
- **This document is required and must be completed by your unit before a job offer can be submitted**

3. Qualification Assessment Plan

- This document will include **all of the qualifications** and SCOEs as indicated in the Job Description
- You will use this document to specify the importance of each qualification and at which stage you will evaluate applicants against these qualifications
- This document is required, and must be completed before a job offer can be submitted

IMPORTANT:
 DO NOT change the qualification numbers or order of qualifications on this document or when using them on the 'Screening Matrices' and 'Applicant and Candidate Disposition Log'. **DO NOT** add additional qualifications. The order of the qualifications must match the order in which they are presented in the job posting.

Hover over each column header for data entry instructions.

Qualification #	Required Qualifications	Weight (H, M, L)	Stage to Use
1	Basic knowledge and experience working with a diverse student population.		
2	Ability to communicate effectively orally and in writing.		
3	Demonstrated ability to make accurate and consistent interpretations of a broad variety of academic and/or administrative policies and procedures.		
4	Demonstrated ability to research and analyze information and come to appropriate conclusions, employing complex policies and procedures.		
5	Experience in effectively using robust web-based and/or networked applications to effectively input, access, and analyze information critical to the daily functioning of the work environment.		
6	Ability to exercise good judgment and discretion, particularly in matters relative to sensitive or confidential student records, personnel or organizational matters.		
7	Demonstrated ability to work independently and set priorities in the context of a full, multifaceted set of responsibilities.		
8	Excellent organizational and time management skills.		
9	Knowledge and experience using standard computing tools including Microsoft Office applications, on-line databases, email, and web-based research tools.		

Qualification #	Preferred Qualifications <i>NEVER used to disqualify applicants - should ONLY be used as a tie-breaker for top candidates</i>	Weight (H, M, L)	Stage to Use
A	Bachelor's degree in related area or combination of equivalent experience / training.		
B	Working knowledge of Oracle/PeopleSoft Campus Solutions system, as well as other student-based computing environments.		
C	Knowledge of UC admissions practices and procedures.		

Special Conditions of Employment
 Statements identifying non-negotiable job related requirements which must either be true about the candidate or which they must meet to be eligible for hire.

4. Screening Matrix – All Applicants

- The matrix should be used to record individual committee member input during the applicant screening process
- Each committee member will have their own tab to evaluate applicants. The results of the evaluations will auto-populate in the Evaluation Summary tab
- **This document is required, and must be completed before a job offer can be submitted**

Click HERE for detailed instructions		EVALUATOR: <input type="text"/>	Screening Matrix - All Applicants											
		JOB TITLE: <input type="text"/>												
		JOB OPENING ID: <input type="text"/>												
L E G E N D	H Highly Qualified	INSTRUCTIONS: This tab will be utilized by the Hiring Manager or Committee Chair On this tab, the HM will enter the qualifications that will be used at this stage of screening in the 'Qualification Numbers' fields below, including the qualification numbers referenced in 3. Qualification Assessment Plan. Enter your name above (F2). Below, to the right of each applicant's name, under each qualification, evaluate the applicant per the legend. You may enter 'Continue' for each applicant to the right of the selection qualification (Column R). Finally, indicate whether you think the applicant meets the qualifications to continue the next stage of the recruitment process in the Continue field (A15) provided to the left of each applicant's name.												
	M Moderately Qualified													
	Y Minimally Qualified													
	N Not Qualified													
	? Can't Tell													
Qualification Numbers: <input type="text"/>														
BRIEF Description of Qualification: <input type="text"/>														
Continue	APPLICANTS													
▼	1													
▼	2													
▼	3													
▼	4													
▼	5													
▼	6													
▼	7													
▼	8													
▼	9													
▼	10													
▼	11													

5. Screening Matrix – Continuing Applicants (Optional)

- Should you choose to screen applications in multiple rounds, there is an additional matrix that you will want to use
- **The use of this document is optional. If used, it must be completed before the job offer can be submitted**

You or a designee will populate the list of applicants continuing to this stage of screening

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Job Title: _____

Job Opening ID: _____

Screening Matrix **Continuing Applicants**

Click HERE for detailed instructions

This tab is a summary of the evaluative work performed on the 'Evaluator' tabs. SHR Talent Acquisition has pre-populated this tab with the names of all applicants who applied by the initial review date. If you request additional applications, the names of those additional applicants will be added here as well by SHR Talent Acquisition.

	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5	Evaluator 6	Evaluator 7	Evaluator 8	Evaluator 9	Evaluator 10	Evaluator 11	Evaluator 12	Evaluator 13
1													
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6. Screening Matrix – Interviewed Candidates

This document helps the hiring committee screen those candidates selected for an interview. **This document is required, and must be completed before a job offer can be submitted.**

You or a designee will populate the list of applicants continuing to this stage of screening

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Job Title: _____
Job Opening: _____

Screening Matrix - **Interviewed Candidates**

[Click HERE for detailed instructions](#)

This is a summary of the evaluative work performed on the 'Evaluator' tabs.
Once the names of candidates ha been populated, DO NOT sort or re-order these cells - it's important to maintain the formulas in this doc
NOTE: You will not need to enter ANY DATA in the gray cells on this form - it will be populated automatically based on information in each

	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5	Evaluator 6	Evaluator 7	Evaluator 8	Evaluator 9	Evaluator 10	Evaluator 11
1											
2											
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7. Reference Check Form

Reference Check Form
[Click HERE for detailed instructions](#)

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Job Title: _____
Job Opening ID: _____
Date: _____
Candidate Name: _____

Name of Reference: _____
Reference Employer: _____
Reference Contact Info: _____
Checked by (Name/Title): _____

Tech Tips:
To start a new paragraph in the cells below, click **Ctrl + Enter** (Command + Enter on Mac)
If needed, you can **resize the row** to show additional text
If **multiple reference checks** are required: After updating the questions in this tab, click the dropdown arrow on this sheet's tab, then select **"Duplicate"** and **rename** each tab created using the appropriate format (Name of Candidate_Initials of Reference Checker)
If you're **pasting information** into the boxes below, please be sure to 1) double click the box before pasting and 2) paste without formatting (Ctrl + Shift + V)


Introduction:
Identify yourself, your role at UCSC, your reason for calling and the position for which the candidate is applying. Briefly describe the duties and responsibilities of the position the candidate is seeking.

Required Questions:
If hiring for a management or supervisor position, you must also include the required questions linked [HERE](#).

Verification of employment: Where did you work with them? How long did you work together? What was your working relationship? Do you know why they left your organization?	
Responsibilities: Please describe their key responsibilities.	
Effectiveness in role: How effective were they in carrying out those responsibilities? Overall, how would you rate the quality of work performed (1-10)?	

- This document provides guidance in developing a **standard set** of reference check protocol and questions
- You or a designee should review the Reference Check Form to identify job-related questions to establish the candidate's prior duties, the quality of their past performance and what strengths or weaknesses can be identified
- **Best practice is to conduct 2 - 3 reference checks for your selected candidate(s)**

8. Applicant and Candidate Disposition Log



Applicant and Candidate Disposition Log

Job Title:

Job Opening ID:

Initial Review Date:

Hiring Manager:

Hiring Unit:

[Click HERE for detailed instructions](#)

INSTRUCTIONS: Use this log once you have completed evaluations and reviewed the Evaluation Summary tab the Screening Matrices (Doc 4, 5 and 6).

In Column F, indicate the qualification number(s) that the applicant or candidate did not meet as strongly as the selected candidate(s). These qualification numbers should be **exactly as they appear** on the Applicant Screening Matrix. You must include at least one qualification that the applicant did not meet

Do not change the numbering of qualifications
Do not create new qualifications
Preferred Qualifications are never used to disqualify applicants. Preferred Qualifications should be used as a tie-breaker between top candidates only

NOTE: Upon request, Talent Acquisition will provide the disqualification reason(s) documented on this form to applicants. Individuals requesting additional information will be referred to the Hiring Manager identified in the Job Opening Request. Recruitment files will be retained by Talent Acquisition for three years.

Selected Candidate:

Selection Justification:
Please provide a narrative response based on job-related criteria and relative to the other candidates but not selected.

To start a **new paragraph** in the cells below, click **Ctrl + Enter** (Command + Enter on Mac)

NOTE: Hover over column titles for descriptions of the column below.

All applicants routed for review (including any released after IRD)	Interview	Status	Status Reason	Qualification(s) not met as strongly	Date Applicant Notified	How was Applicant Notified?
1	▼	▼	▼			
2	▼	▼	▼			
3	▼	▼	▼			
4	▼	▼	▼			
5	▼	▼	▼			

- This document is used to record the justification for the candidate that you'd like to hire
- This document is also used to record the final evaluation for each routed applicant, including interviewed candidates
- **This document is required, and must be completed before a job offer can be submitted**



Coming Soon!

**For guidance on interfacing with the
recruitment documents, check out our
RDS video library**



Click on the binoculars to view our sample Recruitment Document Suite

Notify your CHES HR Contact once all of the required RDS Documents have been completed and a candidate has been selected.