

UC Recruit Department Checklist

Preparing Search Reports

Last updated 6/1/18

Once a candidate is selected as a proposed hire, the department prepares and submits a Search Report for approval. It contains summary information about the recruitment, including information about any applicants with the status of "Proposed Candidate" or later, and any files uploaded to the **Documentation** tab.

A fully approved Search Report must be in UC Recruit before an appointment case can be processed or approved. If the recruitment resulted in no Proposed Candidates, or if it failed or closed for some other reason, it may not be necessary to submit a Search Report; please check with your college or AP analyst.

Generate a Search Report by following these steps:

- Ensure that the Review Date (for Review Date/IRD searches) has passed in order to generate a Search Report for the appropriate review window. For Open/Close/Final searches, the Final date should have passed to allow applicants to make any edits to their applications.
- Update statuses for all Complete applicants marked Meet Basic Qualifications up to and within the appropriate review window under the **Applicants** tab, identifying Proposed candidate(s) – see the UC Recruit Applicant Workflow at https://ap.ucsb.edu/resources.for.department.analysts/content/applicant_statuses_workflow.pdf
- Enter Proposed Offer information for Proposed candidate(s) – leave the step field blank.
- Finish entering Disposition Reasons and Comments (as needed) in **Disposition Reasons** section for non-Proposed candidates. (Incomplete applications are not assessed for Basic Qualifications nor dispositioned and should remain in the Unknown applicant tab.) Mark any second-choice candidates as *Alternates for Position*. NOTE: Proposed Candidate(s) should not have a Disposition Reason.
- Enter **Actual Search Efforts** in **Advertisements** section, if not already provided.
- Upload **Evidences of Advertisement** and outreach (including all ads, tear sheets, emails to listservs, etc).
- Prepare and upload a *Selection Process Overview* document as a PDF and upload to **Interview Materials** under **Documentation** section (see EEO/AA Search Report Preparation Guidelines at https://ap.ucsb.edu/resources.for.department.analysts/content/EEOAA_Search_Report_Guidelines.pdf)
- Upload interview questions, candidate itineraries, job talk announcements, flyers, formal evaluation forms etc., into the **Interview Materials > Documentation** section. Do not include personal notes taken during job talks, presentations made to the department by faculty, or informal internal correspondence.
- Verify that the **Conclusion** section shows the correct Proposed Candidate(s), but do not enter **Search Outcome** or **Recruitment Conclusion** yet (orange dots will appear in these areas, representing in-process status).
- Click **Reports > Search Report > Create new search report**. Complete any required steps as shown.
- Name the report, including last name of the Proposed Candidate(s), and any other information that will help distinguish it from future Reports generated from this recruitment.
- Select the correct review date window from the pull-down menu: "Include applications who completed on or before" and click "Submit now."
- Verify that the approval workflow appears correct. Click "Yes, submit for approval."

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As approvers review the Search Report, they may suggest corrections; changes you make are reflected immediately within the report due to the live updating functionality. Once the last approval occurs, the system sends an email notification to the department and college analysts.

Special handling for pooled recruitments: For all recruitments, only one Search Report may be processed at a time. If proposing more than one candidate for hire within the same Report, the proposal should be for the same position.

- In IRD searches, there may be several review dates.
 - Applicants who applied since the very first review date should be considered as part of any subsequent review date cohort, unless:
 - They did not meet the basic qualifications, or
 - They met basic qualifications but were permanently de-selected in a preceding review
 - Delay adding review dates to the recruitment while the Search Report is in process. If a review date has already been added, it cannot be changed or deleted. In that case, ensure that you mark *Basic Qualifications* only for those applicants inside of the relevant review window.
- Modify or remove earlier disposition reasons and comments when preparing subsequent Search Reports, as appropriate.