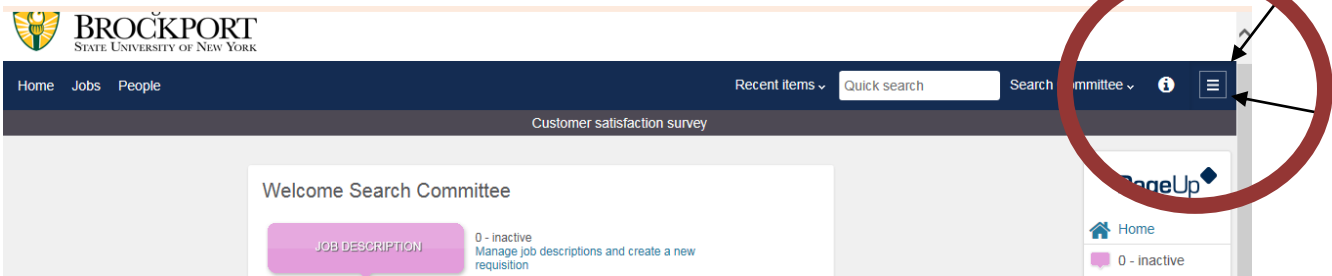


## Changing Applicant Statuses in the PageUp Applicant Tracking System

It is the responsibility of the search committee chair to make status changes so that the proper procedure is followed (ie. HR reviews Summary report, background check gets completed, Offer Card gets completed, etc.) and so that every applicant receives a response.

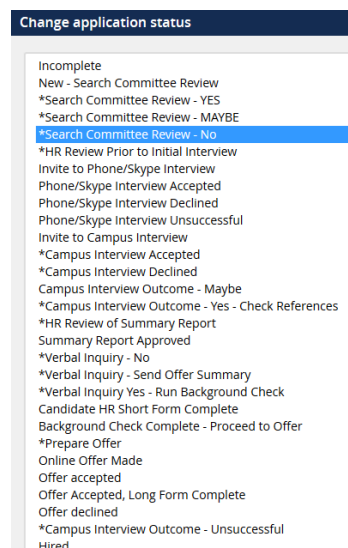
- How to move applicants through application statuses:
  1. Go to PageUp by typing brockport.pageuppeople.com in the browser
  2. Log in using your Brockport NetID and Password
  3. Click on the three horizontal lines in the right hand of the task bar for the menu



4. Then select “Manage Applications”
5. Select the Job
  - This brings up a list of applicants for the job
6. Select the applicant’s name
  - This brings up the “Applicant Card”
7. Under the heading “Applications” is a list of jobs the applicant has applied to
8. Select the status in blue that is hyperlinked to the right of the title of the Job you are Chairing




- This brings up a list of statuses



## How to change an applicant's status?

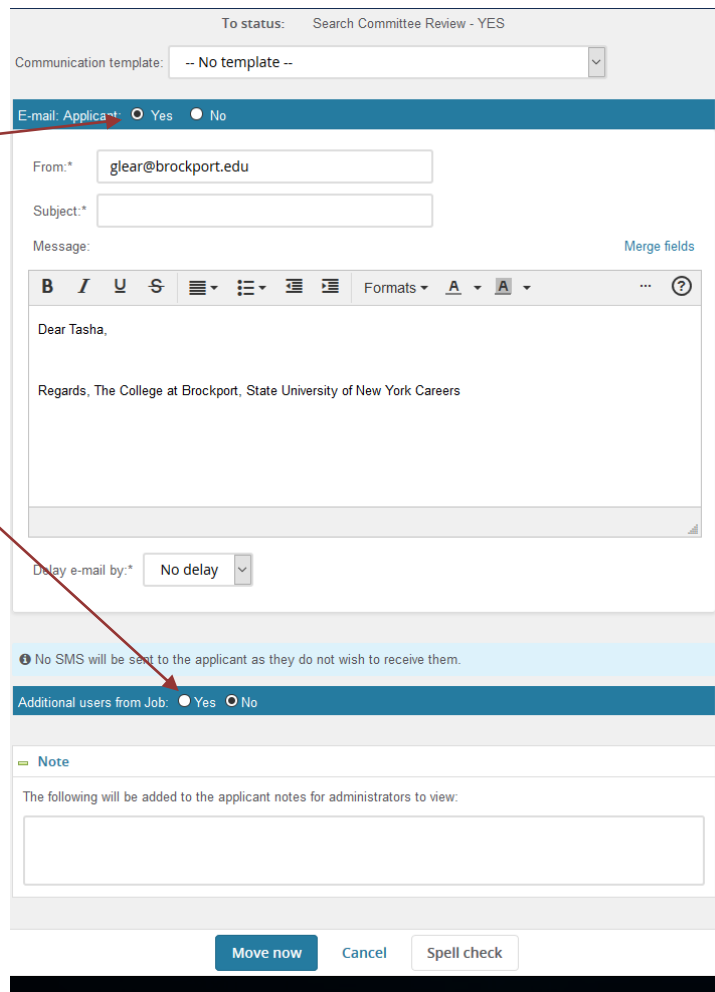
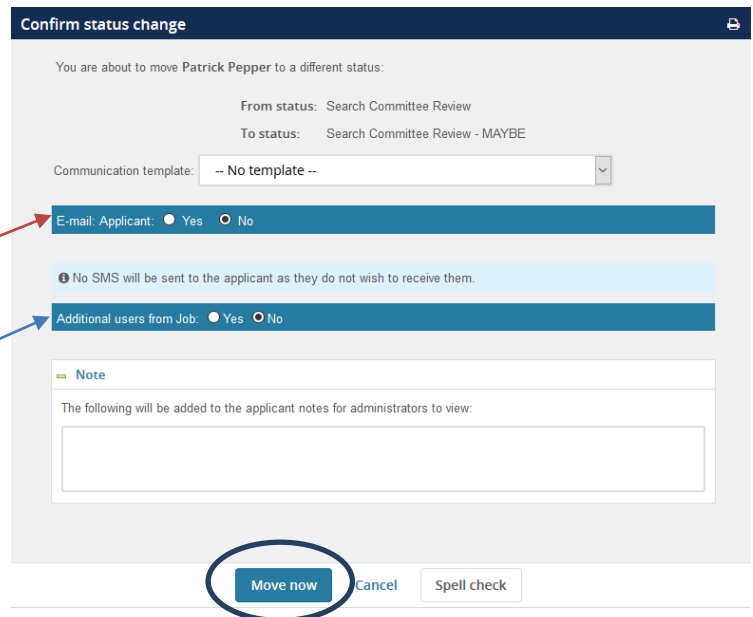
Click on the new status and the -

“Confirm Status Change” screen appears. 

- If you want to send an e-mail to the **applicant** at this status, click **Yes** and complete the e-mail, then click “Move Now”. If not, click **No** and then click “Move Now”.
- If you want to send an e-mail to **search committee members, the hiring manager or HR** making them aware of the status change, click **Yes** and complete the e-mail, then click “Move Now”, if not, click **No** and then click “Move Now”.

This is the same for every status change.

Some e-mails are pre-populated for you.



## When and why to use these statuses?

Once the search committee renders a decision about an applicant's candidacy, the Search Committee Chair is required to change the applicant's status to one of the following three statuses.

- Search Committee Review – Yes*  
*Search Committee Review – Maybe*  
*Search Committee Review – No* }
  - **Yes - Applicants the search committee wants to advance**
  - **Maybe - Applicants the search committee might be interested in**
  - **No – Applicants who are no longer under consideration. An e-mail to the applicant is generated when moved into the No status.**

**These placements keep the committee and the Hiring Manager up to date.**

*HR Review Prior to Initial Interview* } This is a place holder for applicants who have been selected for phone,  
*(Professional and Faculty Only)* skype, or campus interviews.

*Invite to Phone/Skype Interview* } The HR Associate will move the applicants under review to this status  
*(Professional and Faculty Only)* once they are approved.

*Phone/Skype Interview Accepted* } This is a place holder for applicants who have accepted the Phone/Skype  
*(Professional and Faculty Only)* interview.

*Phone/Skype Interview Declined* } Each applicant who declines the Phone/Skype interview should be moved  
*(Professional and Faculty Only)* to this status. This is the last step for these applicants.

*Phone/Skype Interview Unsuccessful* } If the search committee decides that the applicant is unsuccessful at  
*(Professional and Faculty Only)* the Phone/Skype interview, the applicant should be moved into this status.

*Invite to Campus Interview* } This is a place holder for applicants who have been selected for campus  
interviews, while interviews are being scheduled.

*Campus Interview Invite Accepted* } Each applicant who accepts the invite for a campus interview should  
be moved to this status while you are moving through the interview process. By selecting yes for e-mailing the applicant, you can send a confirming e-mail.

When calling to schedule the interview, remember to ask if there are any questions, discuss the salary (when applicable), confirm their e-mail address, and discuss the time and date of the interview. Let the applicant know that they can expect a follow-up e-mail confirming the date and time, parking instructions, a copy of the job description, the agenda for the interview, and a list (including titles) of the search committee members.

*Campus Interview Invite Declined* } Each applicant who declines the invite for a campus interview should  
be moved to this status. This is the last step for this applicant.

### Campus Interview Outcome Unsuccessful

If the search committee decides that the applicant is unsuccessful at the campus interview, the applicant should be moved into this status **once the they have been informed verbally**. By selecting yes for e-mailing the applicant, you can send a confirming e-mail. For Classified positions, **the CSEA contract requires that all classified applicants who interview on campus receive the outcome in writing.**

### Campus Interview Outcome Maybe

This status is used as a place holder. Once a decision is made = Yes or Unsuccessful, then those steps should be followed.

### Campus Interview Outcome Yes – Check References

If this is an applicant the Hiring Manager selects for the position, move the applicant into this status and check references.

Once the references have been checked and the committee has discussed, the Search Committee Chair creates the Summary Report for the Hiring Manager and Human Resources review.

### HR Review of Summary Report

**This IS a mandatory status.** Upload the Summary Report to the Job (see instructions below). Once it is uploaded, move the applicants that were invited to campus interviews to this status. This will alert the HR Associate to review the Summary Report.

### How to attach the Summary Report to the Job:

- Go to your home page
- Click the Green “Search Committee Review” bubble
- Then Click “Edit Job” at the far right

OR go to

The screenshot shows the HR system home page. On the left, there are five colored bubbles: 'JOB DESCRIPTION' (purple), 'OPEN REQUISITIONS' (red), 'APPROVALS' (orange), 'SOURCED JOBS' (yellow), and 'SEARCH COMMITTEE REVIEW' (green). A red arrow points from the 'SEARCH COMMITTEE REVIEW' bubble to the 'Edit Job' link in a table below. The table is titled 'My search committee jobs (incomplete applications are not included)' and has columns for Job number, Date added, Status, Local Title (Campus Title), User, Total app, and Your role. Two rows are visible, both with 'Approved' status and 'Chairperson' role.

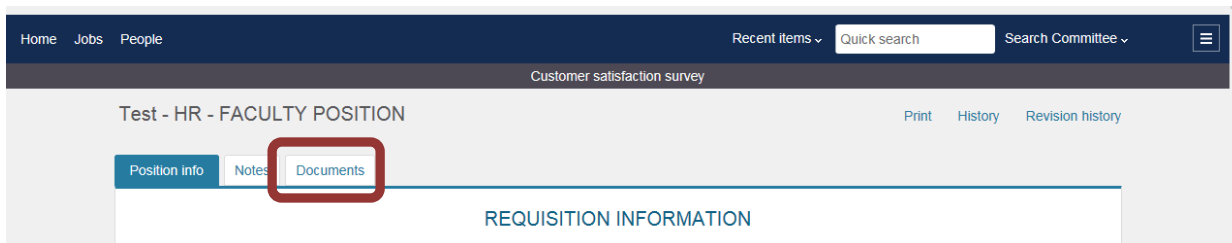
Job number	Date added	Status	Local Title (Campus Title)	User	Total app	Your role
492442	8 Jun 2017	Approved	Test - HR - FACULTY POSITION	HD	9	Chairperson
492443	8 Jun 2017	Approved	Test - HR - INTERNAL PROFESSIONAL POSITIC HD	HD	5	Chairperson

The screenshot shows the job details page for 'Test - HR - Search Chair (493701)'. It has a 'Search' and 'Results' tab. Below the tabs is a table with columns for 'Submitted' and 'Status'. Two rows are shown, both dated '24 Oct 2017' with statuses 'Search Committee Review - YES' and 'Search Committee Review - NO'. A red circle highlights the job title, and a blue arrow points from it to a text box.

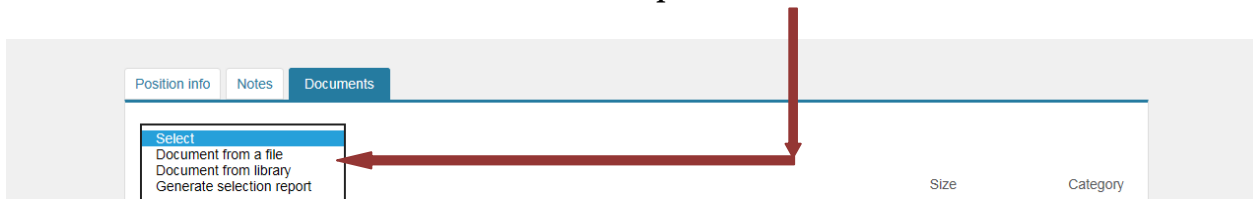
Submitted	Status
24 Oct 2017	Search Committee Review - YES
24 Oct 2017	Search Committee Review - NO

Then click on the job title, then click on documents

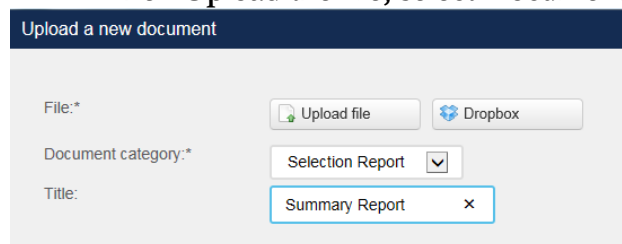
- Then Click “Documents”



- Select “Document from a file” on the drop down menu



- Then Upload the file, select Document Category, and Name the file. Then click “Save and Exit”.



*Verbal Inquiry No* } Each applicant who declines a verbal offer should be moved to this status. This is the last step for these applicants.

*Verbal Inquiry – Send Offer Summary* } Once an applicant has been verbally offered the position and has verbally accepted, move them to this status to attach and send the Offer Summary.

*Summary Report Approved* } **Human Resources Use Only.** Once the HR Associate reviews the Summary Report, and if they approve, they will move the applicant into this status and the Search Committee Chair will receive an e-mail that the report is approved.

Once the summary approval e-mail is received, call and make a contingent verbal offer to the applicant.

*Verbal Inquiry Yes – Run Background Check* } **This IS a mandatory status.** Once an applicant has been verbally offered the position and has verbally accepted, move that applicant into this status. By moving the applicant into this status, the applicant receives an e-mail regarding background checks and also asks them to complete the Candidate HR Short Form. This also sends notification to Human Resources to begin the background check.

*Candidate HR Short Form Complete* } This is an automated status. DO NOT USE THIS STATUS.

*Background Check Complete* } **Human Resources Use Only.** Once the background check is complete, HR will move the applicant to this status and the Search Committee Chair and Hiring Manager will receive an e-mail with this status.

*Prepare Offer* } **The Hiring Manager will prepare and complete the “Offer Card”.**  
**This IS a mandatory status.** When the Hiring Manager is ready to prepare the “Appointment Form”, the Hiring Manager moves the applicant receiving the offer into this status. This triggers an e-mail to the applicant and the search committee chair that the offer is being prepared.

Then press Next and the “Offer Card” will appear. Fill out all of the mandatory fields (fields with an \* in the offer card). Once the form is completed and saved, the Offer Approval Process will begin.

*Online Offer Made* } **Human Resources Use Only.** HR will attach the official Offer Letter and send the letter electronically to the identified applicant. This is the status that HR attaches the Offer Letter and sends it electronically to the applicant.

*Offer Accepted* } This is an automated status. **DO NOT USE THIS STATUS.**

*Offer Accepted, Form Complete* } This is an automated status. **DO NOT USE THIS STATUS.**

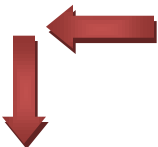
*Offer Declined* } This is an automated status. **DO NOT USE THIS STATUS.**

**Bulk Move – Use Bulk Move if you need to move more than 1 person at a time to the same status.**

**How to:**

1. **Go to Home**
2. **Menu**
3. **Manage Applications**
  - **This opens the list of applications for a specific job**

4. **Check the box to the far left of all of the applicants you want to change status for**



Home Jobs People Recent items Quick search

Customer satisfaction survey

New applicant Search by answers to questions Merge applicant Select a bulk action

Test - HR - ADJUNCT POSITION (492441)

Search Results

Page	Submitted	Status	Pref Name	First name	Last name	Phone	Mobile	Email	State	City	Score	Employee	Dup	Sub-source	Flags
<input checked="" type="checkbox"/>	26 Jun 2017	New (Hiring)		Connor	Clark			cclark@allitek.com	New York	Danville				Eagle	View
<input checked="" type="checkbox"/>	26 Jun 2017	New (Hiring)		Rose	Reid			rreid@allitek.com	New York	Bath				Other	View
<input type="checkbox"/>	26 Jun 2017	Background		Christopl	Catasen			ccatas@mobiletek.com	New York	Canistota				Professi	View

5. On the menu bar, select the drop down menu “Select a bulk action”
6. Select “Bulk Move”

It is the responsibility of the search committee chair to make status changes so that the proper procedure is followed (ie. HR reviews Summary report, background check gets completed, Offer Card gets completed, etc.) and so that every applicant receives a response.

Section 61 of the Civil Service Law states that eligible applicants who are not selected for appointment, but who were interviewed on campus, should be notified of the outcome in writing (emailed through PageUp).

As determined by the Office of Human Resources at The College at Brockport, all applicants interviewed on campus should be notified of the outcome personally (phone call). Then a follow-up email through PageUp can be sent.