Comprehensive Tenure Track Search Job Aid
I. Overview (Slide 3)
II. Creating a Requisition (Slide 4)
   a) Upload an ISG Form (Slide 10)
   b) Approval Paths (Slide 17)
   c) How to leave a note (Slide 19)
III. Posting Your Position (Slide 20)
IV. Dispositioning Applicants (Slide 23)
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VI. Obtaining Approval of the Short-List & Finalists in APWS (Slide 40)
VII. Obtaining Approval of the Draft Offer Letter Through the Offer Card (Slide 54)
VIII. Closing the Job (Slide 66)
Creating Tenure Track Requisitions in PageUp

**Requisition**
(Page Up)

Record Keeper inserts relevant tenure-track position information and upload ISG questionnaire.

**Approval path**
- College Level Approval
- Provost's office (hiring plan)
- ISG (ISG interview requirement)
- Talent Management
  (Review of requisition information and advertising plan)

**Changes**
- One requisition (Page Up) instead of two.
- ISG & college level approvers interacting with Page Up instead of APWS.

**Short-List & Finalists**
(APWS)

Record Keeper initiates Phase II submission, uploads approved Page Up requisition and candidate information (CVs).

**Approval Path (No Change)**
- Talent Management
  (short-list approval)
- Provost Office
- ISG (if required)

**Changes**
- Record Keeper needs to data input certain requisition information

**Offer Card**
(Page Up)

Record Keeper initiates offer card with relevant candidate information, draft offer letter & start-up spreadsheet.

**Approval path**
- ISG (start-up & facilities)
- Provost Office
  (draft offer letter)

**Changes**
- Offer card replaces email to Academic Personnel for offer letter approval.
Click the New Requisition
Select the correct DeptID for the TT position

Click Univ of Mass Amherst

Click Tenure Track

Skip this box and click the Next button to move to a blank Req.
Enter TT position number if known otherwise email TalentManagement for new number

Enter previous req. number from prior search otherwise leave blank

Input your Division

Select the department the TT position resides in
<table>
<thead>
<tr>
<th>Position no</th>
<th>Type:</th>
<th>Applicant</th>
<th>Application status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Select New or Replacement

Select the amount of positions required: New (additional headcount) or Replacement (backfilling an existing employee)

Reason: Select

Current/Previous Incumbent: Enter name if applicable

Incumbent termination date: Enter date if applicable

Working Title/ Posting Title:* Update Title i.e. Asst. Professor etc.

If a term position please indicate the term length: Select

Enter TT position number

Select a reason why the TT position is vacant

Skip this field
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position/Classification Type:*</td>
<td>Select</td>
<td>Select Faculty Full Time</td>
</tr>
<tr>
<td>Date opened:</td>
<td>10 Apr 2019</td>
<td>Skip Date opened and Date filled</td>
</tr>
<tr>
<td>Date filled:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FLSA Status:</td>
<td>Select</td>
<td>Select Exempt</td>
</tr>
<tr>
<td>Hours Per Week:</td>
<td></td>
<td>Skip this field</td>
</tr>
<tr>
<td>Weeks per year:</td>
<td>Select</td>
<td></td>
</tr>
<tr>
<td>Shift and Daily Work Schedule (ie M-F 8:30am - 5pm):</td>
<td></td>
<td>Skip this field</td>
</tr>
</tbody>
</table>

Select Faculty - Academic Yr. or Faculty - Calendar Yr.
Click link to download ISG Form. Attach completed form to documents tab

Enter speed type(s) that will fund the position

Enter budgeted amount for position

Select Tenure Track

Select Yes or No for lab space

Make a selection for joint appointments

ISG will indicate if an ISG campus interview is required
Complete this ISG Smart Form and attach it to the requisition in PageUp on the Documents Tab. Instructions on how to attach document are on next slide.

<table>
<thead>
<tr>
<th>PAGE UP REQUISITION NUMBER:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Proposed office (bldg &amp; room no.)</td>
</tr>
<tr>
<td>2. Will the proposed office be vacant on hire date?</td>
</tr>
<tr>
<td>3. If not vacant on hire date, identify swing space (bldg &amp; room no.)</td>
</tr>
<tr>
<td>4. Will a lab/studio be needed?</td>
</tr>
<tr>
<td>5. Proposed lab/studio, if applicable (bldg &amp; room no.)</td>
</tr>
<tr>
<td>6. Current condition of the lab/studio is:</td>
</tr>
<tr>
<td>7. Will the proposed lab/studio be vacant on hire date?</td>
</tr>
<tr>
<td>8. If not vacant on hire date, identify swing space (bldg &amp; room no.)</td>
</tr>
<tr>
<td>9. Comments by dean/department on facilities plan.</td>
</tr>
<tr>
<td>10. Is it possible the person hired for this position will do research requiring any of the following?</td>
</tr>
<tr>
<td>Vertebrate animals</td>
</tr>
<tr>
<td>Human subjects</td>
</tr>
<tr>
<td>Clean room facilities</td>
</tr>
<tr>
<td>Cell or tissue samples</td>
</tr>
<tr>
<td>Chemical, biological, or radioactive materials</td>
</tr>
<tr>
<td>High-speed, performance, or large-volume computing</td>
</tr>
</tbody>
</table>
Click “Document from a file” to attach a document to the req.

Click “Document from a file” to attach a document to the req.

Click Upload file to find document on your computer

Select Amherst – Other as the Document category

Click Save a draft to save the req. without submitting it for approvals otherwise click either Submit buttons to route the req. through your approval process if you have completed filling out the required fields on the “Position info” tab

Click Save and add another to attach multiple documents otherwise click the Submit and close button to attach your document
Select Yes for Search Committee

Enter Search Committee Chair’s name here

Enter Record Keeper’s name here

Click button to add Search Committee Members

Email PageUpsupport@umass.edu to add/remove search committee members after requisition has been submitted for approvals in PageUp.

Pop-Up window will appear search each member and click the “Add” link to add them to the req. as a SC Member
Enter Speed Type that funds Ads here

If you plan to advertise externally indicate the advertising sources:

- HigherEd Jobs
- External careers site
- The Chronicle of Higher Education
- Diversity Publications/Websites (please specify)
- Other (please specify)
- LinkedIn
- Intranet
- Trade Publications/Journals (please specify)
- Lowell Sun
- Springfield Republican

Check the applicable boxes, PageUp will not post to these sites, this is to inform HR of your advertising plan

List each advertisement source(s) here i.e. websites, journals, periodicals etc.

Posting location:
UMass Amherst

Campus location:
Skip this field
No Site name selected.

Posting summary:
Enter brief summary of position i.e. Dept. of X seeks applicants for a TT appointment in Physics
Complete the Posting text section.
See next slide for example.

**About UMass Amherst**

UMass Amherst, the Commonwealth's flagship campus, is a nationally ranked public research university offering a full range of undergraduate, graduate and professional degrees. The University sits on nearly 1,450-acres in the scenic Pioneer Valley of Western Massachusetts, and offers a rich cultural environment in a bucolic setting close to major urban centers. In addition, the University is part of the Five Colleges (including Amherst College, Hampshire College, Mount Holyoke College, and Smith College), which adds to the intellectual energy of the region.

**Job Description:**

**Requirements:**

**Additional Information:**

**Application Instructions:**

UMass Amherst is committed to a policy of equal opportunity without regard to race, color, religion, gender, gender identity or expression, age, sexual orientation, national origin, ancestry, disability, military status, or genetic information in employment, admission to and participation in academic programs, activities, and services, and the selection of vendors who provide services or products to the University. To fulfill that policy, UMass Amherst is further committed to a program of affirmative action to eliminate or mitigate artificial barriers and to increase opportunities for the recruitment and advancement of qualified minorities, women, persons with disabilities, and covered veterans. It is the policy of the UMass Amherst to comply with the applicable federal and state statutes, rules, and regulations concerning equal opportunity and affirmative action.
About UMass Amherst

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Job Description:

The Department of Communication at the University of Massachusetts Amherst seeks a communication scholar whose research and teaching focus on urban communication, environmental communication, and/or civics and governance in ‘smart cities’. We seek theoretical and methodological innovation in researching the constitutive role of communication and information infrastructures in people’s experience of the built environment. We seek a colleague whose work complements and extends the traditions in the department, which include digital media and public participation, cultural production and social inequality, and postcoloniality.

Additionally, the Department is interested in candidates who have demonstrated ability to contribute to the inclusive excellence and diversity mission of the department, college and university in research, teaching, and/or outreach. The rank will be at the Assistant Professor level. The position will begin Sept. 1, 2019 and will include responsibilities for teaching and supervision at the undergraduate and graduate levels. The ability to collaborate on and eventually lead interdisciplinary, grant-funded projects is desirable.

Requirements:

A completed PhD in Communication or closely allied field is required by the start of the appointment.

Additional Information:

Review of applications will begin on October 15, 2018 and will continue until the position is filled.

Application Instructions:

Applications should include a letter of interest, a CV, evidence of teaching effectiveness, and one article-length example of research, and names and contact information for three references.

UMass Amherst is committed to a policy of equal opportunity without regard to race, color, religion, gender, gender identity or expression, age, sexual orientation, national origin, ancestry, disability, military status, or genetic information in employment, admission to and participation in academic programs, activities, and services, and the selection of vendors who provide services or products to the University. To fulfill that policy, UMass Amherst is further committed to a program of affirmative action to eliminate or mitigate artificial barriers and to increase opportunities for the recruitment and advancement of qualified minorities, women, persons with disabilities, and covered veterans. It is the policy of the UMass Amherst to comply with the applicable federal and state statutes, rules, and regulations concerning equal opportunity and affirmative action.
Enter the Record Keeper’s name or the person who created the req. name here.

Enter Appointing Authority’s name here.

Both people will receive emails from PageUp once the req. has been approved.

Select one of the Amherst TT Approval paths.

Enter your Dept Approver’s name then leave the remaining approvers as is.

Select “Pending Approval” to route your req through your Approval process above.

Click “Save a draft” to save the req. without submitting it for approvals otherwise click either Submit buttons to route it through your approval process.

Click “Save a draft” to save the req. without submitting it for approvals otherwise click either Submit buttons to route it through your approval process.
Example of New Tenure Track Approval Paths

Enter your Dept Approver’s name then leave the remaining approvers as is.

<table>
<thead>
<tr>
<th>Step</th>
<th>Approval position</th>
<th>Levels above position</th>
<th>Default user</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dept Apprc</td>
<td>Select ▼</td>
<td>No User selected</td>
</tr>
<tr>
<td>2</td>
<td>Dean</td>
<td>Select ▼</td>
<td>Tricia Serio</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>E-mail: <a href="mailto:tsorio@umass.edu">tsorio@umass.edu</a></td>
</tr>
<tr>
<td>3</td>
<td>Provost Off</td>
<td>Select ▼</td>
<td>ProvostOffice Faculty</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>E-mail: <a href="mailto:Provost-HR@umass.edu">Provost-HR@umass.edu</a></td>
</tr>
<tr>
<td>4</td>
<td>ISG</td>
<td>Select ▼</td>
<td>Pamela Rooney</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>E-mail: <a href="mailto:prooney@facil.umass.edu">prooney@facil.umass.edu</a></td>
</tr>
<tr>
<td>5</td>
<td>Human Re:</td>
<td>Select ▼</td>
<td>Talent Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>E-mail: <a href="mailto:talentmanagement@umass.edu">talentmanagement@umass.edu</a></td>
</tr>
</tbody>
</table>
To leave a note click Note then type your note within the next pop-up window.

Click Save a draft to save the req. without submitting it for approvals otherwise click either Submit buttons to route the req. through your approval process.

Click “Next page” to move to the Posting tab on the req.

Type notes here, these can be seen by all approvers.

Click Submit to save note onto the req.

How to Leave a Note
Click “Add posting sites” to open Source Channels pop-up window.
1. Click the word Amherst to refresh the source channel page. Amherst should be highlighted blue, when done correctly.
2. Enter Opening date and time.
3. Click “+ Ungrouped” then select the “Faculty” check box under the Search Categories section.
4. Select Amherst Faculty as the “Application form”
5. Check the Posting Text to ensure the correct priority deadline etc. is listed.
6. Click the check box next to Amherst
7. Click the “Submit” button
Posting Your TT Position After The Req. Has Been Approved

Your TT position is set to post if you see the Opening date you selected.

Use the “Actions” button to access a drop down menu

1. Edit = Opens the Source Channel Page for editing.
2. Close = Close the posting and remove it from the careers page.
3. Link = Gives you a direct link that can be placed in external ads.
4. Job Preview = A snapshot of the Posting Text
5. Bulk Update Sourcing Text = DO NOT USE
Dispositioning Applicants

My Dashboard
Welcome Test, this is your Dashboard where you will see all your tasks organized in various stages.
<table>
<thead>
<tr>
<th>Job No.</th>
<th>Date created</th>
<th>User</th>
<th>Title</th>
<th>Department</th>
<th>Status</th>
<th>Applications</th>
<th>Opening date</th>
<th>Closing date</th>
<th>Hiring manager</th>
<th>Posted</th>
</tr>
</thead>
<tbody>
<tr>
<td>495776</td>
<td>21 Sep 2018</td>
<td>HU</td>
<td>Assistant Professor in Mechanical and Industrial Engineering</td>
<td>Mech &amp; Industrial Er Offer</td>
<td>Finalist</td>
<td>119</td>
<td>4 Oct 2018</td>
<td></td>
<td>Sundar Krishnamurty</td>
<td></td>
</tr>
<tr>
<td>495455</td>
<td>31 Aug 2018</td>
<td>AF</td>
<td>Assistant Professor in Early American History</td>
<td>History</td>
<td>finalist</td>
<td>138</td>
<td>21 Sep 2018</td>
<td>22 Mar 2019</td>
<td>Brian Ogilvie</td>
<td>x</td>
</tr>
<tr>
<td>495384</td>
<td>28 Aug 2018</td>
<td>DO</td>
<td>Assistant Professor in Biostatistics</td>
<td>Biostatistics &amp; Epide Offer</td>
<td>finalist</td>
<td>79</td>
<td>28 Aug 2018</td>
<td></td>
<td>Deborah Osowski</td>
<td>✓</td>
</tr>
<tr>
<td>493235</td>
<td>21 Aug 2018</td>
<td>SPHHS</td>
<td>Assistant Professor in Epidemiology</td>
<td>Biostatistics &amp; Epide Offer</td>
<td>finalist</td>
<td>67</td>
<td>24 Aug 2018</td>
<td>21 Feb 2019</td>
<td>Deborah Osowski</td>
<td>x</td>
</tr>
<tr>
<td>490503</td>
<td>15 Aug 2018</td>
<td>ST</td>
<td>Assistant Professor in Environmental Health Sciences</td>
<td>Environmental Health Reference checking</td>
<td>finalist</td>
<td>72</td>
<td>21 Aug 2018</td>
<td></td>
<td>Suzanne Tromara</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Search by Current Recruitment**

Click on the title of the job you wish to view.
Click View applications
See next 5 pages for “Status” explanations.

Clicking an applicant’s name will launch their applicant card.
New Disposition Process
New Disposition Process


2. Meets Minimum Qualifications = All applicants that meet the minimum requirements for the position should be placed into this status. No emails are sent to applicants from this status. Applicants in this status will appear on the 2nd tab in the EEO report.

3. Faculty Letters of Recommendation = Place applicants into this status to trigger the system to email their references requesting letters of recommendation.

4. *Screened – No Longer Under Consideration = Applicants that do not meet the minimum requirements or whom were never interviewed should be placed into this status. This status will send the applicant an email notifying them that they are no longer being considered.

5. Preliminary Interviews (Skype/Zoom/Phone) = Search Committee may conduct preliminary interviews to further reduce the candidate pool down to candidates who will be invited for campus interviews. Place each applicant that will be awarded a preliminary interview into this status. No automatic email is sent to applicants from this status. Applicants in this status will appear on the 3rd tab in the EEO report.

6. *Preliminary Interview – No Longer Under Consideration = Applicants that received a preliminary interview and will not be considered for a campus invite, place into this status. No automatic email is sent to applicants from this status.

*Final Status requires you to enter a disposition code.
New Disposition Process

7. **Campus Interview (Shortlist)** = Place the applicants that have been approved by the Search Committee, Department Chair, Dean, and Provost Office for campus interviews into this status. No automatic email is sent to applicants from this status. Applicants in this status will appear on the 4th tab in the EEO report.

8. **Declined Campus Interview Invite** = Applicants that have declined your campus interview invites should be placed into this status. No automatic email is sent to applicants from this status.

9. **Campus Interview – No Longer Under Consideration** = Applicants that have completed their campus interview but will no longer be considered for hire should be placed into this status. No automatic email is sent to applicants from this status.

10. **Finalist** = Applicants that have gone through the campus interview process and subsequently recommended as a finalist by the Search Committee should be placed into this status. No automatic email is sent to applicants from this status. Applicants in this status will appear on the 5th tab in the EEO report.

11. **Finalist – Not Selected for Hire** = Applicants that have been deemed a finalist by the Search Committee but will no longer be considered for hire should be placed into this status. No automatic email is sent to applicants from this status.

*Final Status requires you to enter a disposition code.*
New Disposition Process

12. **Approved for Offer** = Applicants that have received formal offer approval in APWS should be placed into this status. No automatic email is sent from this status.

13. **Recommended For Hire** = This status initiates the Offer Card. Place the candidate you wish to hire into this status then complete the Offer Card that appears. No automatic email is sent to the applicant from this status.

14. **Offer Made** = Place your applicant(s) into this status after you have extended a formal offer to them. No automatic email is sent from this status.

15. **Offer Accepted** = Applicant(s) that have accepted your formal offer should be placed into this status. No automatic email is sent from this status. Applicants in this status will appear on the 6th tab in the EEO report.

16. **Offer Declined** = Place any applicant(s) that have declined your formal offer into this status.

*Final Status requires you to enter a disposition code.*
17. Background Check in Progress = Applicant(s) will automatically be placed into this status once they complete their background application in the CSI site.

18. Background Check Cleared = Talent Management will place applicants into this status once their background check has been cleared with no flags present.

19. Hired = Place your applicant into this status once Talent Management has updated their status to Background Check Cleared. If no Background Check was required then place your candidate into this status after you have placed them into the Offer Accepted status and completed the Offer Card. No automatic email is sent to the applicant from this status.

20. *Ineligible = Use this status for applicants that have applied past the posted deadline. Do not use this status for applicants that are not minimally qualified, those applicant’s should be placed into the Screened – No Longer Under Consideration status. No automatic email is sent to the applicant from this status.

21. *Withdrawn = Place applicants that have withdrawn from consideration into this status. No email is sent to the applicant from this status.

*Final Status requires you to enter a disposition code.
Click on an applicant’s status to open a pop-up window with additional statuses you may place them into.

Select the status you wish to place the applicant into then click the “Next” button.
When placing applicants into any status that doesn’t have an automatic email template your next pop-up window should be similar to this screenshot.

Review to confirm you are moving your applicant to the correct status.

Do not update any of the fields, simply click the “Move now” button to place your applicant into your specified status.
Your pop-up screen should resemble the screen below, when placing your applicant into a status that has an automatic email or a *Final Status.

When using a Final Status, make sure you scroll to the bottom of the window to disposition your applicant(s). See next 2 pages for acceptable disposition codes.

Click the “Move now” button after selecting the appropriate disposition code.
Acceptable Disposition Codes

1. **Does Not Meet Qualifications** = Use this code for any applicant that does not meet the minimum requirements for the position.

2. **Does Not Meet Background / Reference Check Requirements** = Use this code for any applicant that fails the background or reference check process.

3. **Visa Requirements Not Met** = Use this code for applicants that cannot meet the visa requirements.

4. **Ineligible** = Please consult with HR prior to using this code.

5. **Other Candidates More Suitable** = Use this code for applicants that were minimally qualified but not selected for hire.

6. **Staying With Current Employer** = Use this code for applicants that have indicated they are staying with their current employer.

7. **Unable To Relocate** = Use this code for applicants that have indicated they are no longer able to relocate for your position.
Acceptable Disposition Codes Cont.

8. **Accepted Another Offer** = Use this code for any applicants that have indicated that they have accepted another offer.

9. **Not Aligned With Career Goals** = Use this code for any applicants that have specified your position no longer aligns with their career goals.

10. **Personal Reasons** = Use this code for applicants that have removed themselves from consideration due to personal reasons.

11. **Company Benefits Unsatisfactory** = Use this code for applicants that have removed themselves from consideration due to our benefits not meeting their requirements.

12. **Remuneration Unsatisfactory** = Use this code for applicants that have removed themselves from consideration due to our salary not meeting their requirements.

13. **Travel Requirements Unsatisfactory** = Use this code for applicants that have removed themselves from consideration due to unsatisfactory travel requirements.

14. **Continuing Study** = Use this code for applicants that stated they are continuing their studies and wish to no longer be considered for your position.
After clicking the “Move now” button your applicant’s status should be updated to the status indicated on the prior pop-up window.
1. New = Applicants appear on the “All Applications” tab within the EEO report. This is the first tab in the report that reflects the demographic data of your entire applicant pool.

2. Meets Minimum Qualifications = Applicants in this status appear on the 2nd tab labeled “Minimally Qualified” within the EEO report. This shows you the demographic makeup of your minimally qualified pool.

3. Preliminary Interviews (Skype/Zoom/Phone) = Applicants in this status appear on the 3rd tab labeled “Preliminary Interview” within the EEO report. This shows you the demographic makeup of your preliminary interview pool.

4. * Campus Interview (Shortlist) = Applicants in this status appear on the 4th tab labeled “Campus Interview” within the EEO report. This shows you the demographic makeup of your campus interview pool.

5. *Finalist = Applicants in this status appear on the 5th tab labeled “Finalist Interview” within the EEO report. This shows you the demographic makeup of your finalist pool.

6. Offer Accepted = Applicants in this status appear on the 6th tab labeled “Offer Accepted” within the EEO report. This shows you the demographic makeup of your final candidate.

*Requires Pre-Approval in APWS
Run EEO Report

(Example)

Click Reports then click the “Amherst EEO Report – TT link
Requisition
(Page Up)

Record Keeper inserts relevant tenure-track position information and upload ISG questionnaire.

Approval path
- College Level Approval
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- ISG (ISG interview requirement)
- Talent Management
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Short-List & Finalists
(APWS)

Record Keeper initiates Phase II submission, uploads approved Page Up requisition and candidate information (CVs).

Approval Path (No Change)
- Talent Management (short-list approval)
- Provost Office
- ISG (if required)

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- Record Keeper needs to data input certain requisition information

Offer Card
(Page Up)

Record Keeper initiates offer card with relevant candidate information, draft offer letter & start-up spreadsheet.

Approval path
- ISG (start-up & facilities)
- Provost Office (draft offer letter)

Changes
- Offer card replaces email to Academic Personnel for offer letter approval.
Short-List (Campus Interviews) Approvals

https://cps.provost.umass.edu/umaerpt/auth/login

Log In

Please enter your NetID (IT Account user name) and password below to enter the system.
Your NetID and password are what you use to sign into systems such as UMail, SPIRE and UDrive, as well as many other IT systems.

NetID:  
Password:  

Log-In with your NetID and Password

If your NetID works in UMail, SPIRE or UDrive - but not here - send email to Tech Support  

Don’t have a NetID username, or can’t remember your password? Contact UMass IT Support Center or call 545-TECH (8324)

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Choose Your Employment Type

* I am a Faculty Member or I am Creating a Submission Related to Faculty

If you are a faculty member (instructor, assistant professor, associate professor, professor; or a person with any rank in these titles: lecturer, clinical, extension, research), click on the link above to begin a new submission for a personnel action (reappointment, promotion, tenure, APR, sabbatical applications, etc.).

* I am a Librarian or I am Creating a Submission Related to Library Staff

If you are a librarian at any rank, click on the link above to begin a new submission for a personnel action (reappointment, promotion, continuing appointment, AREL, sabbatical applications, etc.).

Choose Submission Type

* Faculty Hiring

  Conduct interviews for faculty searches
IMPORTANT: These two fields will determine workflow!

1. Select the appropriate department.
2. Ensure the appropriate search year is selected.
3. Select the appropriate School/College.
4. Enter in the approved Page Up Requisition Number.
5. Choose between: Assistant, Associate, Professor, or Open Rank.
6. Enter in the area of specialization. If more than one position is part of this requisition, note it here.

### Submission for Tenured Faculty Interviews

**Search Year**
Choose the academic year in which the search will be conducted.

2019-2020

**Primary Hiring Authority**
Please choose the primary hiring authority.

- **College of Education**
- Dept not yet determined

**Requisition Number**
Enter the five or six digit requisition number.

R

**Working Title**
Choose the working title.

- Select One...

**Area of Specialization**
To distinguish this position from other requisitions in progress, briefly describe the area of specialization that the search proposes to fill. Examples: "Macroeconomic theory", etc.

- [Blank]
Confirmation Required: Do you want to create this draft submission for Tenured Faculty Interviews?

Requisition Number: 123456
Working Title: Assistant Professor
Primary Hiring Authority: School: College of Humanities & Fine Arts Dept: History

I WANT TO CREATE THIS SUBMISSION

Create Draft

After creating the draft submission you will then be able to edit it and submit it for review and approval. You can still add material after you submit, but you

I WANT TO CANCEL THIS ACTION

Cancel
This will reflect your Page
Up Requisition Number

R123456 UMass Historian -- Provost (ref #18973)

Your APWS reference
number.

Sections

Section: Search Personnel (click to show) 3 required items unanswered
Enter in the record keeper. Be consistent with what you entered in Page Up.

Enter in the search committee chair. Be consistent with what you entered in Page Up.

If ISG indicated on the Page Up requisition that ISG interviews are required, Select Yes.

If yes, upload the ISG questionnaire.

IMPORTANT: This field will determine workflow!
R123456 UMass Historian -- Provost (ref #18973)

[Image of a web page with options: Instructions, Edit Draft, Share/Submit/Withdraw, and buttons for Reassign Draft Submission, Share Draft Submission, and a prompt to \Prepare for Submission\ and \Discard This Draft Submission\.

Sharing

Reassign Draft Submission: Specify the new owner of this draft submission. You will no longer be able to edit or submit the draft unless it is reassigned back to you.

Workflow Actions

Note: As you have uploaded files and entered text, the system has saved your work. You may leave this page, move to other pages, or quit your browser without losing your work. When you want to resume work on this draft, look for the "TO DO!" tab in "My Submissions."

When completely done with your submission, start the review process by clicking on the "Prepare for Submission" button below. The submission will no longer be able to be edited once it is submitted.

Prepare for Submission

Discard This Draft Submission
Record Keepers or Search Committee Chairs can complete this step.

### Confirm Workflow or Go Back to Editing

Do you want to submit this submission?

**I confirm this submission AND its workflow are ready for review.**

### Future Reviews/Approvals

Please look over these workflow steps and their chairs. If you see anything incorrect, missing, or that you are unsure of, or are aware of any possible missing, etc contact the system administrators before submitting this draft. Failure to do so may cause this submission to be rejected and you need to start over.

<table>
<thead>
<tr>
<th>Step</th>
<th>Person Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Short List</td>
<td>Jocelyn J Tedisky (jtedisky)</td>
</tr>
</tbody>
</table>

### Complete Your Recommendation

**Complete Your Recommendation**

### Enter Short List

**Forms**
To complete your processing of this submission, the following forms must be completed.

<table>
<thead>
<tr>
<th>Action</th>
<th>Form Name</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Proposed Campus Interview List</td>
<td></td>
<td>1 Required Item(s) Unanswered</td>
</tr>
</tbody>
</table>

**Edit**
Insert Candidate information

Upload Search Committee Memo

Search Committee Memo
Enter your memo describing how you determined this list.

Add to File Uploads

Candidate List
You can enter this information in any order.

Candidate #1 (click to hide)

Add to File Uploads

Candidate #2 (click to hide)

Add to File Uploads

Add to File Uploads

Add to File Uploads
Enter Short List

Forms
To complete your processing of this submission, the following forms must be completed.

<table>
<thead>
<tr>
<th>Action</th>
<th>Form Name</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Proposed Campus Interview List</td>
<td>07/15/2019</td>
<td></td>
</tr>
</tbody>
</table>

You have the authority to take action for your committee/department/etc., level of review below. Unless otherwise stated beside the option you pick, this will move this submission from this step to the next step so that committee or person level of review can start its work. The next step is College Approval of Campus Interview List.

- 🇺.Done. Move to next step

If you have any comments you want to make, you can enter them below. These WILL be seen by the person who created this submission and by all other reviewers.

Save Decision
Process R123456 UMass Historian -- Provost

Proxy

You have proxy privilege to manage submissions on behalf of Hiring Search Committee Chair (R123456). You can process on behalf of Jocelyn Tedisky

Do you want to proceed?

Confirmed  Cancel
### View Recommendation History

<table>
<thead>
<tr>
<th>Step</th>
<th>Done By</th>
<th>Status</th>
<th>Date</th>
<th>Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Short List (head: Jocelyn J Tedisky)</td>
<td>Jocelyn J Tedisky</td>
<td>processed</td>
<td>07/15/2019</td>
<td>Proposed Campus Interview List</td>
</tr>
<tr>
<td>Step</td>
<td>Possible Approvers</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CURRENT STEP:** College Approval of Campus Interview List

| Step | Forms | | |
| Provost Approval of Campus Interview List (head: Michael J Eagen) | Possible Approvers: Michael J Eagen (chair), John J McCarthy, Jessica L Sadowski, Ann M Williams |
| ISG Post-interview Comments (head: Christine A Rogers) | Possible Approvers: Christine A Rogers (chair), Kelly N Smiaroski, Tilman Wolf |
| Committee Assessment and Ranking of Candidate (head: Jocelyn J Tedisky) | Possible Approvers: Jocelyn J Tedisky |
| Dean Preferred Rankings | Possible Approvers: |
| Vice Provost of Facilities Approval (head: Deborah M Gould) | Possible Approvers: Deborah M Gould (chair), Ann M Williams |
Requisition
(Page Up)

Record Keeper inserts relevant tenure-track position information and upload ISG questionnaire.

Approval path
- College Level Approval
- Provost's office (hiring plan)
- ISG (ISG Interview requirement)
- Talent Management
  (Review of requisition information and advertising plan)

Changes
- One requisition (Page Up) instead of two.
- ISG & college level approvers interacting with Page Up instead of APWS.

Short-List & Finalists
(APWS)

Record Keeper initiates Phase II submission, uploads approved Page Up requisition and candidate information (CVs).

Approval Path (No Change)
- Talent Management
  (short-list approval)
- Provost Office
- ISG (if required)

Changes
- Record Keeper needs to data input certain requisition information

Offer Card
(Page Up)

Record Keeper initiates offer card with relevant candidate information, draft offer letter & start-up spreadsheet.

Approval path
- ISG (start-up & facilities)
- Provost Office
  (draft offer letter)

Changes
- Offer card replaces email to Academic Personnel for offer letter approval.

Begin Offer Card Stage
## Completing the Offer Card

### Offer Card Training Session 01-11-19 (497430)

<table>
<thead>
<tr>
<th>Page</th>
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<th>Last name</th>
<th>Phone</th>
<th>Cell Phone</th>
<th>Email</th>
<th>Country</th>
<th>State</th>
<th>City</th>
<th>Ref. Score</th>
<th>Dup</th>
<th>Undisclosed</th>
<th>Employee</th>
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<th>Sub-source</th>
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<td>New</td>
<td>Clark</td>
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<td>Kent</td>
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<td></td>
<td>Internet ITA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click an applicant’s status

---

Page 1 of 1 | 55
Select Recommended For Hire then click Next
You are about to move Clark Kent to a different status:

- From status: New
- To status: Recommended For Hire

Communication template: -- No template --

E-mail Applicant: Yes  No

Additional users from Job: Yes  No

The following will be added to the applicant notes for administrators to view:

Leave screen as is and click Move now
Offer Card Process

Ensure this is the correct applicant and the correct requisition.
Offer details

Approval status: Pending
Date entered: 10 Jan 2019, 8:35 am
Application source: Internet - Invite to apply

Positions:

<table>
<thead>
<tr>
<th>Position no</th>
<th>Type:</th>
<th>Applicant</th>
<th>Application status</th>
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</thead>
<tbody>
<tr>
<td>Assoc Professor A</td>
<td></td>
<td>New</td>
<td>-</td>
</tr>
<tr>
<td>U of M</td>
<td></td>
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<tr>
<td>UMAM+90029</td>
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<tr>
<td>Assoc Professor A</td>
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</tr>
<tr>
<td>U of M</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Campus: Univ of</td>
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<tr>
<td>Mass Amherst</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Department:</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Department:</td>
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<tr>
<td>Position Reports</td>
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<td>To:</td>
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<tr>
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<td>Pay Grade: 04</td>
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<td>Union Code: A50MTA/NEA MSP Faculty</td>
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<td>IPEDS Code: Instruction (Rsrch/PubSrvc)</td>
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<tr>
<td>EEO-1 Category:</td>
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<tr>
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<td>EEO-2 Category:</td>
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<tr>
<td>Faculty</td>
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<td></td>
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<tr>
<td>SOC: 25-1000 PostsecondaryTeachers</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>FLSA: X-No FLSA Required</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Group: 21</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

POSITION DETAILS

Start date:*  Enter start date
End date if applicable:
FLSA status: Exempt
Hours per week: Skip this field
Weeks per year: Select Skip this field
Exempt Positions enter Annual Salary

Enter full stipend amount/title/percentage of time

Enter start date of Pre-TT appointment

Tenure Track positions skip these fields

Only Pre-Tenure Track complete these fields

Use this field for all Fall/Spring Pre-TT appointments

Enter full stipend amount/title/percentage of time

60
Answer Yes if applicant has never worked on campus before or their last hire date was beyond one year.

Enter Reference’s Name, Title & Date contacted

Enter position’s reports to manager

Skip this section
Upload draft offer letter and start-up spreadsheet.

Docs. Uploaded by the applicant are here.

Enter your name here. You will receive an email once the Offer Card is approved.

Click Submit and close to submit Offer Card for approvals.

Select Amherst TT as the Approval process.
How To Check An Offer Card’s Approval Status

1. Follow steps outlined on slides/pages 21-24 to get to the Applicant Pool screen as shown below.
2. Click on the applicant’s first name to launch their applicant card.
3. Click on the link that appears under “Offer” this will launch the Offer Card.
4. Scroll to the bottom to view the approval path.

*If you complete the steps above and don’t see an application, contact Talent Management.
To enter new salary after initial salary has been approved click the cancel button.

After completing the steps shown on this slide scroll back to the Salary section on the Offer Card and enter your new salary amount then resubmit through the same approval paths.

*For Pre-TT offer modifications please see next slide
Modifying a Pre-TT Offer After Approval

1. Click “Cancel” to update Pre-TT start date & stipend amount.

2. Enter reason why new offer is being requested. Then click the OK button.

3. Scroll up to the “Salary” section in the Offer Card.
4. Use the “Summer Salary” field to enter all Fall/Spring Pre-TT appointments and full stipend amount/title/percentage of time.
5. Enter the Pre–TT appointment start date in the identified field.
6. Upload signed offer letter to the “Offer Document” section, see slide 12 for reference.
7. Submit for approval:
   1. ProvostOffice Faculty
   2. Talent Management
My Dashboard
Welcome Test, this is your Dashboard where you will see all your tasks organized in various stages.

Click the Jobs Link
Search by Current Recruitment

Click on the title of the job you wish to view

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Date created</th>
<th>User</th>
<th>Title</th>
<th>Department</th>
<th>Status</th>
<th>Applications</th>
<th>Opening date</th>
<th>Closing date</th>
<th>Hiring manager</th>
<th>Posted</th>
</tr>
</thead>
<tbody>
<tr>
<td>497430</td>
<td>9 Jan 2019</td>
<td>RS</td>
<td>Offer Card Training Session 01-11-19</td>
<td>Human Resources</td>
<td>Pending approval</td>
<td>7</td>
<td></td>
<td></td>
<td>Test Account</td>
<td></td>
</tr>
<tr>
<td>494552</td>
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<td>AUAT</td>
<td>TEST_Migration_Requisition_OFFER_CARD</td>
<td>Human Resources</td>
<td>Testing</td>
<td>7</td>
<td>21 Nov 2018</td>
<td>4 Dec 2018</td>
<td>Alyce Mitchell</td>
<td></td>
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<tr>
<td>495341</td>
<td>24 Aug 2018</td>
<td>TM</td>
<td>TEST_Offer_Card_communication</td>
<td>Human Resources</td>
<td>Testing</td>
<td>1</td>
<td></td>
<td></td>
<td>Amherst SuperUser</td>
<td></td>
</tr>
</tbody>
</table>
Scroll to the bottom of the requisition.
Click the Close Job link
Important Statuses:

1. Recommended For Hire – This status triggers the Offer Card and must be used for each hire on the requisition.
2. Offer Made – Use this status once the Offer Card has been approved and the formal offer has been extended.
3. Offer Accepted – Use this status once the formal offer has been accepted. Very important status, as this status links the position number to your selected candidate.
4. Hired – Use this status once your candidate has cleared their background check if required.
Requisition Example One
(Closing a req. without dispositioning applicants)

The next slide is showcasing an example of a requisition that has not had their applicants dispositioned to a final status. When closing a requisition it is very important to first disposition all remaining applicants i.e. place them into one of the following final statuses listed below. To learn how to disposition please see our training video online at http://videos.umass.edu/hr

**FINAL STATUSES:**

1. Screened – No Longer Under Consideration
2. Preliminary Interview – No Longer Under Consideration
3. Declined Campus Interview
4. Campus Interview – No Longer Under Consideration
5. Finalist – Not Selected For Hire
6. Offer Declined
7. Ineligible
8. Withdrawn
If you see this message this means you did not disposition your candidates. You will not see this message once all candidates have been dispositioned.

Click the Manage applications link to go to your applicant pool and disposition your remaining applicants.
The next slide is showcasing an example of a requisition that has had their applicants dispositioned to a final status. When closing a requisition it is very important to first disposition all remaining applicants i.e. place them into one of the following final statuses listed below. To learn how to disposition please see our training video online at http://videos.umass.edu/hr

**FINAL STATUSES:**

1. Screened – No Longer Under Consideration
2. Preliminary Interview – No Longer Under Consideration
3. Declined Campus Interview
4. Campus Interview – No Longer Under Consideration
5. Finalist – Not Selected For Hire
6. Offer Declined
7. Ineligible
8. Withdrawn
Only select filled, failed search, or cancelled from the drop down window. Never select closed.

Select “No” on the Job closed agency notify form.

Click the Save button once you have selected the status and selected “No” above.
Only select filled, failed search, or cancelled from the drop down window. Never select closed.

Click the Save button once you have selected the status and selected “No” above.
The next slide is showcasing an example of a requisition where you are not going to hire anyone into the position due to a failed search or position being cancelled. You will need to disposition each candidate in your applicant pool and place them into a final status. To learn how to disposition please see our training video online at http://videos.umass.edu/hr

**FINAL STATUSES:**

1. Screened – No Longer Under Consideration
2. Preliminary Interview – No Longer Under Consideration
3. Declined Campus Interview
4. Campus Interview – No Longer Under Consideration
5. Finalist – Not Selected For Hire
6. Offer Declined
7. Ineligible
8. Withdrawn
Choose the most appropriate reason for cancelling the position from the drop down. Never select closed.

Only select failed search, or cancelled from the drop down window.

Select "No" on the Job closed agency notify form.

Click the Save button once you have selected the status, reason for cancelling and selected “No” above.