Applicant Management and Request to Interview Quick Reference Guide

This user guide is intended for the search chair or search coordinator. Use this guide to manage applicants, add dispositions and request candidates to interview.

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If you have any questions about Applicant Management and Request to Interview, please reach out to HR:

HR@wwu.edu

Log Into PageUp

Go to https://western.pageuppeople.com to log into the system.

To Review Job Applicant Materials

Once you are signed into the PageUp system, click on Jobs in the top right-hand corner. Locate your position in the list and click the title. (Please note, you may see a number under the Applications column – this may not match the exact number of applications that have been submitted. The system counts submitted as well as in-progress applications. You are only able to view those that have been submitted.) This will bring you to the Recruitment Request form. You will then click on "View Applications" in the top right.

If you are brought into Applicant Progress Board, and you see List View and Board View on the top right of the screen

List View   Board view

Click List View and then please click "Manage Applications" on the right to follow these instructions.

The view of applications is different for the Search Chair/Search Coordinator than Search Committee members. Only the Search Chair/Search Coordinator can update applicant statuses. If you are looking for instructions for the Search Committee, please view Search Committee Reference Guide.

To the right of the candidate's name, click the icon that is two pieces of paper -
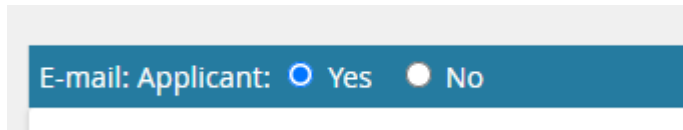
From this view, you will be able to see if your candidates uploaded their materials or hand-typed in the information. You can click the link to open the respective document(s).

To Change/Update Applicant Status

The applicant status is utilized to determine where in the process your applicant is located. To update the status, you will click the application status to the left of your applicant's name). You can change to the following status:

> **Application Incomplete**: If you requested additional materials be submitted to the application and they are missing, you can put the application into "Application Incomplete". This will bring up an email template to notify the applicant that they are missing required documents. You can update this template as needed to match your requirements. **Please note: For an applicant to make changes to a submitted application they will need to withdraw their application and reapply. If the position is already closed, they will not be able to furnish this information.** If you are sending the email, click "Move now" and the email will be sent, and the status will be updated.
>
> If you do not want to send this email, update the radio button to No:
>
> E-mail: Applicant: ○ Yes   ● No
>
> Click "Move now" and the status will be updated, and no email will be sent.
>
> **Phone Screen:** If you are phone screening your candidates, you can update to the Phone Screen status. Phone screens do not require approval.
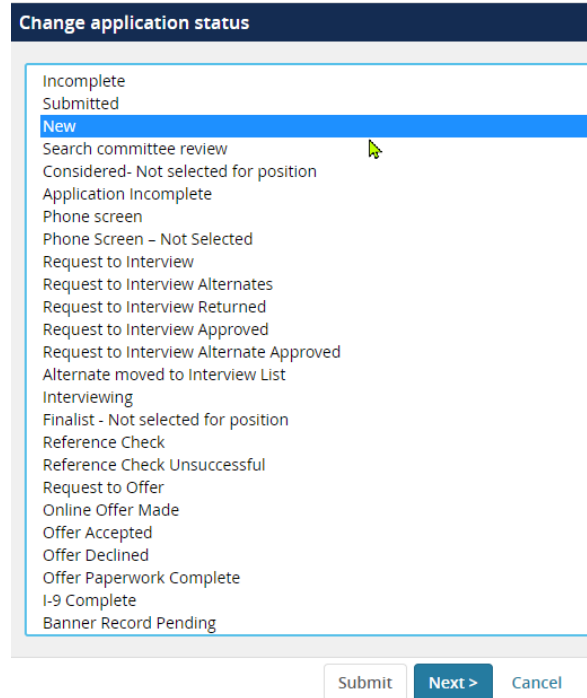
To Add Disposition

A disposition (a specific reason for non-selection) must be provided for each applicant not selected for an interview.
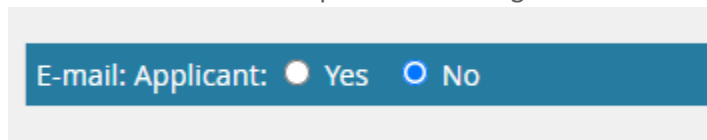
Click on the status next to the applicant's name
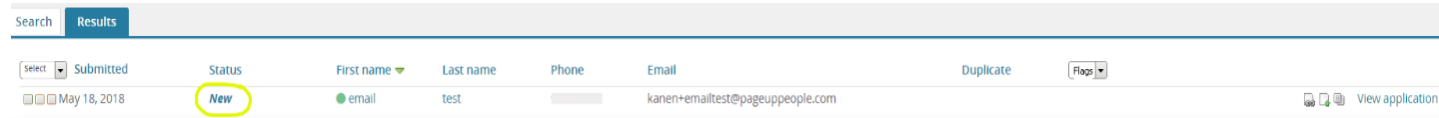

A pop-up box will appear select one of the following:

Before Interviews: select the 'Considered - Not selected for position' status

then click "Next". Keep the following at No:

You will choose the reason for this status by utilizing the drop down:

IMPORTANT: You will need to complete the status by writing the specific qualification your candidate lacked/had less (or other reason, if applicable) in the Note field:
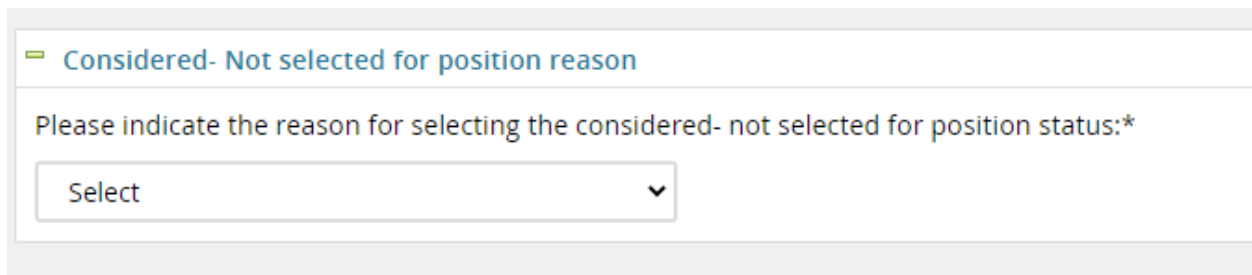
Note

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

This information is what will be reviewed when you submit for interview/offer.

Click "Move now" to update the status.

After Interviews: select the 'Finalist – Not Selected' status and click 'Next' and follow similar steps as above

To Edit Disposition

Only the user that entered the disposition can make edits to their note.

As a Search Chair or Search Coordinator Click "Jobs" then "View" to the right of the Job

As a Supervisor Click "Jobs Open" in the top menu bar, then the Title of the Job Click "View Applications"

Click the applicant's name

Locate the disposition in the "History" section of the applicant

> **Example:**
> Status changed to 'Considered- Not selected for position' by [User's Name] Lacks Required Qualifications
> No supervision experience

Click "Edit" on the note, and there is an option to "Delete"

Make any edits to the note, the third line of the note is the specifics of the disposition

 Click "Submit"

Request to Interview
If you are phone screening your candidates, you do not need to submit a request to interview.

Once you have made your determination of your finalists, you will submit your request. You cannot schedule interviews until they have been approved by HR (Classified Staff positions) or CRTC (Faculty and Professional Staff positions).

From your "View Applications" listing click the first checkbox (green) next to each applicant's name you are wanting to interview. ☑☐☐

IMPORTANT: Click the drop-down arrow at the top of the screen 'Select a bulk action' and select '**Bulk move and send**' from the list.

A communication template will open in a new window. Choose the communication template, 'Request to Interview (TO CRTC/HR) in the first drop down. An email will be populated with all the information needed for your interview request. Enter one of the following in the user field:

      CRTC@wwu.edu (Professional Staff, Executive, and Faculty searches)

      Recruit.HR@wwu.edu (Classified Staff searches)

No other fields need to be completed. Click Next. The system will ask what status you want to update your candidates – choose "Request to Interview", click Next. Click 'Move Now'. No additional information is necessary.

You will follow the above steps for "Request to Interview" to request Alternates. This time you will pick the status – Request to Interview – Alternates. **When/if alternates are interviewed, you will update their status to 'Alternate Moved to Interview List'.**

Once CRTC or HR review your request(s) you will receive an approved email and your candidate(s) status will be updated to 'Request to Interview Approved' or 'Request to Interview Alternate Approved'. At this time, you can contact your finalists for interview.

Reviewing Recruitment Reports

Only the Search Chair and Search Coordinator can review recruitment reports.

From your dashboard, click "Jobs" in the top right-hand corner. Find your position and click on the title.

Click on "Reports" from the top menu.

Position info   Notes   Documents   Reports

The following reports are available:

Applicant Contact Information: This report will show the email addresses and phone numbers for all your candidates.

Dispositions Check: This report will show all your candidates and the dispositions (specific reasons for non-selection) that you or the Search Coordinator entered. *You will want to review this report to ensure these are all completed before requesting to interview.*

Search Committee Comments: This report will show the initial screening determination by the members of your search committee. This report will only be populated if the search committee is utilizing this functionality of the system.

Communicating with Applicants

PageUp can mass communicate the same message to multiple applicants all at once (or one-by-one).

From your 'View Applications' screen, select the applicant(s) that are to receive the communication by using the green check box to the left of their name(s).

Utilizing the "Select a bulk action" drop-down at the top of your screen, select "Bulk Communicate".

Select a communication template if one is available - if none are applicable select "No Template".

Update the "From" field if needed. Any replies to this message will send to the email specified in this field and will not go through the PageUp system.

Update the "Subject" if needed.

Make any desired updates to the email message.

Click "Send".