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Checklist for Academic Searches in PeopleAdmin

*Copies of all placed advertisements, letters, or any other efforts made to generate candidates must be maintained by the hiring unit for a minimum of five years from the time the position is filled—IUPUI Office of Equal Opportunity (OEO) reserves the right to randomly audit positions to be sure the required documents are on file.

☐ Create a New Posting for the vacant position in PeopleAdmin, before ads are placed.

REGIONAL CAMPUSES: Approval is required from Executive Associate Dean for Educational Affairs for a faculty search (not a research associate or an academic specialist) using the Education Affairs Administrative Action Request (AAR)

☐ Place the ad and begin recruiting after receiving approval from IUPUI Office of Equal Opportunity (OEO) through PeopleAdmin. The position will automatically be posted on the IU Jobs website.

☐ Candidates apply directly through PeopleAdmin.

☐ Review all applications

☐ Move select applicants to “Request Interview/OEO Review” workflow state before scheduling interviews

*Remember, a second review of URM applicants may be requested by OEO

☐ Move select applicants to “Not Interviewed, not selected”

☐ Schedule candidate for Interview after receiving approval from OEO through PeopleAdmin.
  ☐ Move candidate to “Applicant Declined Interview” workflow state if interview declined

☐ Move lead candidate to “Interviewed, Ready to Submit Hiring Proposal” workflow state
  ☐ Move all other interviewed candidates to “Interviewed, not selected” or “Withdrawn”

☐ Create Offer Packet as a single PDF in the following order for lead candidate

  OEO requires an academic position announcement must be advertised in PeopleAdmin for 30 days before an offer can be made.

  ☐ Approval of Terms
  ☐ Offer letter template
  ☐ CV
  ☐ Additional Required Documentation for Tenure Track on page 2 of the Approval of Terms document

☐ Start Hiring Proposal in PeopleAdmin for the lead candidate

  OEO requires an academic position announcement must be advertised in PeopleAdmin for 30 days before an offer can be made.

☐ Send offer letter and other required paperwork to candidate after receiving approval in PeopleAdmin

  DO NOT SEND THE OFFER LETTER to the candidate until approval is received in PeopleAdmin

☐ Move Hiring Proposal to “Offer Accepted” once signed offer letter has been received

☐ If candidate declines offer, move Hiring Proposal to “Offer Declined”

☐ Proceed to the Academic eDoc Processing Checklist for Hiring steps
Introduction
IU School of Medicine uses the PeopleAdmin Applicant Tracking System for faculty and other academic searches. Faculty Affairs, Professional Development and Diversity (FAPDD) has implemented this system in order to automate the academic job posting, application, interview, and offer approval processes.

You will use this system to complete these tasks:

- Create Postings
- View Applicants
- Request Interviews
- Route Offers for Approval

Throughout these tasks, you will be able to communicate with IUPUI and IUSM administrators, applicants, and others involved in your hiring process using PeopleAdmin.

Getting Started
PeopleAdmin can be accessed by going to One.iu.edu and searching for the PeopleAdmin Faculty Applicant Tracking System.

After clicking the Start button, the following screen may appear:

Click the link at the top that says “Click here to log in with your IU Username” to be routed through CAS/DUO authentication.

Once logged in, the Online Recruitment System Home page will appear. The Home page is a dashboard to help you keep track of actions and postings:

- Items in the Inbox require attention.
- Items on the Watch List are things you have selected to keep an eye on during the approval process.
Creating a New Posting

1. Select “IUSM Initiator” from the User Group drop down on the Home page

2. Click the Postings tab and select School of Medicine

3. Click the +Create New Posting button in the upper right corner

4. Select either Create from Position Type or Create from Posting

Create from Position Type

1. Title – enter the faculty title and unit (e.g. Assistant/Associate/Full Professor of Pediatrics)

2. Department – choose the appropriate department or division. Regional campuses should select the appropriate regional campus as the department

3. Applicant Workflow – the default is to place applicants in the “Application Received” workflow. All department initiators will receive an email each time an applicant applies to the position if “Application Received with Email” is selected.

4. References – PeopleAdmin has the ability to manage the reference letter collection process. It is not required that units use PA to collect reference letters, and this section may be left blank if you prefer to collect references outside of PeopleAdmin.

   a. If units choose to use PA to collect references, please go to page 9 of the Indiana University PeopleAdmin User Guide. General instructions are provided below.

      i. Reference Notification – select a workflow state that will trigger the referencing process.

         1. A request will be sent to the applicant to supply information for references if they have not already done so, then requests for letters will be sent to those referees. The referees will then submit those letters via PeopleAdmin.

         ii. Recommendation Workflow – Once the required number of references (you can set this number up later) have been submitted, the system will transition the applicant into a new workflow of your choice.

         iii. Recommendation Document Type – use the default selection “Reference Letter”

5. Click

6. Enter Posting Details

   a. Title – enter the faculty title and unit (e.g. Assistant/Associate/Full Professor of Pediatrics).

      i. Please enter all applicable ranks for the appointment type you select
b. Specific title – use for administrative and/or endowed chair titles, if applicable

c. Appointment type – use the Academic Appointment & Titles Guide to identify the correct appointment and enter

d. Campus – select the appropriate IUSM campus

e. Pooled Position – if you need to recruit more than one person to this posting, select yes

   i. Pooled position postings are limited to a 1 year posting length. If all positions have not been filled within 1 year, a new posting will need to be submitted and the original posting transitioned to a final workflow state.

f. Number of Pooled Positions – this is a singular number (e.g. 2, 6, 26) indicating the total number of individuals you intend to hire on this one posting. The HRMS position is not required.

g. Position Announcement – list the details of the position (a posting Compass is available for each appointment type here)

   i. Please use the IUSM Inclusive Language Guidelines to ensure inclusiveness in the posting language

   ii. Do Not include any EEO statement. The EEO statement is automatically added to each posting on the IU job board once the posting is approved.

   iii. DO INCLUDE the IUSM Diversity Statement:

       At the IU School of Medicine, we offer focused, systematic and sustained programs that are aligned with three foundational pillars of diversity and inclusion: representational diversity, inclusive working and learning environment, and cultural competence. Therefore, we are looking for applicants who can help ensure all our mission areas are inclusive and equitable

   iv. If information is included about the School of Medicine or Indianapolis, the only approved text that can be used is:

       Indianapolis is the capital and most populous city in the State of Indiana. It is growing economically thanks to a strong corporate base anchored by the life sciences. Indiana is home to one of the largest concentrations of health sciences companies in the nation. Indianapolis has a sophisticated blend of charm and culture with a wonderful balance of business and leisure. The growing residential base is supported by rich amenities and quality of life – the city possesses a variety of professional sports, arts venues and outdoor recreation areas. Residents of this dynamic city, and surrounding suburbs, enjoy leading educational systems and top-ranked universities, paired with a diverse population. Indianapolis International Airport is a top-ranked international airport, being named “Best Airport in North America” by Airports Council International for many years. For additional information on life in Indy: https://faculty.medicine.iu.edu/relocation

   v. Information about the department, division, center, or lab is optional to include.

h. Basic Qualifications – the degree indicated in this field should match the Highest Degree Earned column on the Academic Appointment & Titles Guide associated with the Appointment type entered above (6.c.)

   i. For Research Associate and Lecturer, Master’s degree is the only degree that can be entered in this field

   ii. For Open, Tenure, Clinical, Scientist please use “terminal degree or doctorate degree required” instead of “MD or PhD required”

i. Department contact for questions – list the name and contact information of the person the applicant should contact with questions

j. Posting date – do not fill this in, the system will automatically populate this once approved
k. Do you plan to advertise this position – this is additional advertising outside of the IU Job board. Every posting in PeopleAdmin is automatically posted to Higher Ed Jobs and Insight into Diversity.
l. If yes, where – list the additional job boards and outlets you plan to advertise this position in
m. Post to HERC – this stands for the Higher Education Recruitment Consortium. IU covers the cost of advertising in HERC.
   i. If yes is selected, at least 1 HERC category must be check marked
   ii. If no is selected, check mark “Don’t Send to HERC”
n. Does your search committee have at least three members, as well as gender, racial and ethnic diversity?
   i. Search committees should consist of a minimum of three individuals and a maximum of seven individuals that are varied in gender, racial and ethnic diversity
   ii. All committee members are responsible for contributing to the diversity of opinions in the search process and committee members should feel empowered to identify and recruit qualified Underrepresented minority “in medicine” candidates
      1. URM categories and incumbency/availability information are available in each unit’s Department Annual Report (DAR).
   iii. Email iusmhire@iu.edu for assistance if your unit is unable to meet those requirements.
7. Add Supplemental Questions, if needed
   a. All IUSM postings have two Supplemental Questions that cannot be removed or edited
   b. Click “Add a question” and search for a topic or click “Add a new one” to create a new question if there is not one in the existing list
      a. Click the “Required” checkbox on new question(s) added
b. New questions will be reviewed and approved by IUSM Faculty Affairs before appearing on postings

c. Click

8. Identify required Applicant Documents
   a. Review the list of documents and if a document is optional, select the Optional radio button; if it is required, select the Required radio button.

<table>
<thead>
<tr>
<th>Order</th>
<th>Name</th>
<th>Not Used</th>
<th>Optional</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Curriculum Vitae</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Letter of Application</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>List of References</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   b. Document types marked “Not Used” cannot be attached to the application

9. Upload Search Documents
   a. Nothing is required to be uploaded in this section
   b. Click

10. Enter Search Committee - OEO requires a minimum of three members of diverse race, gender and ethnicity
    a. Click
    b. Type the name of the user in the Search box
    c. Click
       i. Check the Committee Chair check box if applicable
       ii. If member is not found in search, click
           1. Complete the Account Information
           2. Click
           iii. For committee members that do not have an @iu.edu, @indiana.edu, @iupui.edu, or other Indiana University domains, information will be entered on the Guest User tab, in the Posting process
       iv. Click

11. Communication to Search Committee
    a. Nothing is required to be entered in this section
    b. Click

12. Enter Guest User information, if applicable
    a. Click
    b. Enter address of guest users by typing one email address per line in the box provided
    c. Click
d. Guest users will receive an email from iufacjob@indiana.edu with the guest username and password they will use to log into PeopleAdmin

e. Click Next >>

13. Reference Request Details
a. Nothing is required to be uploaded in this section
b. Click Next >>

14. Summary
a. Review the Posting details

  i. If the posting needs revised, click Posting Details Edit

  ii. If no edits are needed, click Keep working on this Posting and select the appropriate action from the drop-down menu

<table>
<thead>
<tr>
<th>WORKFLOW ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel (move to Cancelled)</td>
</tr>
<tr>
<td>For Academic Appointments in Anesthesia, Medicine, and Pediatrics - Send to Department Approver (move to IUSM Department)</td>
</tr>
<tr>
<td>For Academic Appointments in All Other Departments - Send to School Approver (move to IUSM School)</td>
</tr>
</tbody>
</table>

The posting will be routed to the appropriate approver(s) for review. Once the position has been final approved, it will be posted and initiator will receive a notification. If the initiator has not received notice of edits or posting approved within 2 business days, please email iusmhire@iu.edu. OEO requires an academic position announcement must be advertised in PeopleAdmin for 30 days before an offer can be made.

**Edit a Posted Position**

Once a posting has been approved by OEO, edits can only be made by emailing iusmhire@iu.edu.

**Place the Ad**

The approved posting in PeopleAdmin will automatically be posted to the following job boards

- HigherEd Jobs
- HERC (requires selections in Enter Posting information section above)
- Insight Into Diversity

When placing ads in other venues

- The IU Equal Opportunity Employer statement must be included
  - Indiana University is an equal employment and Affirmative Action Employer and a provider of ADA services. All qualified applicants will receive consideration for employment without regard to age, ethnicity, color, race, religion, sex, sexual orientation, gender identity or expression, genetic
information, marital status, national origin, disability status or protected veteran status. Indiana University does not discriminate on the basis of sex in its educational programs and activities, including employment and admission, as required by Title IX. Questions or complaints regarding Title IX may be referred to the U.S. Department of Education Office for Civil Rights or the university Title IX Coordinator. See Indiana University’s Notice of Non-Discrimination here which includes contact information.

The Annual Security and Fire Safety Report, containing policy statements, crime and fire statistics for all Indiana University campuses, is available online. You may also request a physical copy by emailing IU Public Safety at iups@iu.edu

- All applicants must apply in PeopleAdmin
  - Include the URL found in the Quick Link for Posting box at the bottom of the Position Details in the Posting
- Advertising Tips and Requirement
  - It is important to cast a wide net and aim for a diverse applicant pool. Search committees can develop an advertising and outreach plan for every search. While good candidates come not only through advertising, it is important to disseminate the word as widely as possible and ensure that the job announcement is visible in a number of publications, professional organizations and listservs.

Candidates Apply

Reviewing Applicants

1. Click and select School of Medicine

2. Choose the posting from the list or type the title of the posting in the search box and click Search

3. Hover over Actions and select View Applicants from the drop down.

To view an applicant’s documents one at a time

1. Find the row with the applicant’s name

2. Click on the name of the document in the Documents column

To view an applicant’s materials as a single file

1. From the ‘Applicants’ tab on the posting, click More Search Options (applications details and all uploaded documents)

2. From the ‘Add Column’ dropdown menu, choose ‘Combined Document’ and wait for the page to refresh with the new column.

3. Find the row with the applicant’s name and click Generate in the Combined Document column
4. After the page refreshes, click View

To view a collection of applicant documents
You can select and review more than one applicant document at a time.

1. From the ‘Applicants’ tab on the posting, check the boxes to the left of the applicant’s name
2. Hover over Actions and select ‘Download Applications as PDF’
3. Select the types of documents you want to view, then click Submit

To view the applicants materials as separate documents

1. Hover over Actions
2. Select Create Document PDF per Applicant
3. After the page refreshes, click View in the Combined Document column

Move Applicants to a Workflow State

*To remove the posting from the job board and to prevent additional applications, hover over Take Action On Posting and Click Posting Closed (move to Closed)

Request Interview

Single Applicant

1. Click the name of the applicant you wish to view/move from the Applicants tab on the posting
2. Hover over Take Action On Job Application and click Select For Interview, OEO Review
3. Click Submit

Multiple Applicants

1. Check the box next to the names of the applicants from the Applicants tab on the posting
2. Hover over Actions and click Move in Workflow
3. Click the Select a workflow state... drop down menu next to Change for all applicants
4. Click Select For Interview, OEO Review
5. Click Save changes

Schedule Interview

Use your departmental or unit procedures for scheduling and conducting interviews. More information about interviews is available in the Recruiting Toolkit.
Declined Interview

Single Applicant
1. Click the name of the applicant you wish to view/move from the Applicants tab on the posting
2. Hover over and click
3. Click

Multiple Applicants
1. Check the box next to the names of the applicants from the Applicants tab on the posting
2. Hover over and click
3. Click the drop down menu next to Change for all applicants
4. Click
5. Click

Interviewed

Lead Candidate
1. Click the name of the applicant you wish to view/move from the Applicants tab on the posting
2. Hover over and click
3. Click

Not Selected
1. Check the box next to the names of the applicants from the Applicants tab on the posting
2. Hover over and click
3. Click the drop down menu next to Change for all applicants
4. Click Not Interviewed, Not Selected or Withdrawn
5. Click

Offer Packet - OEO requires an academic position announcement must be advertised in PeopleAdmin for 30 days before an offer can be made.

Approval of Terms/Required Documentation
1. Complete the Approval of Terms form
Offer Letter Template
1. Fill in all details on the Offer letter template

CV
1. Retrieve the CV from the applicant’s documents

Other Required Documents
1. Refer to the Required Documentation section of the Approval of Terms form and the Additional Required Documentation for Tenure Track on page 2

Assemble Offer Packet Document
1. Combine all documents into a single PDF
2. Place the documents in the same order they are listed on the Approval of Terms form, Required Documentation section and Additional Required Documentation for Tenure Track on page 2
3. Save the PDF document

Hiring Proposal - OEO requires an academic position announcement must be advertised in PeopleAdmin for 30 days before an offer can be made.

Create Hiring Proposal
1. Click and select School of Medicine
2. Choose the posting from the list or type the title of the posting in the search box and click Search
3. Click on the Applicants tab
4. Click on the name of the applicant
5. Click on Start Hiring Proposal
6. Choose
7. Ensure the name and appointment information on the screen is correct and enter the start date
8. Choose [Next >>]

9. Choose **Actions** in the Offer Packet Document row

10. Click [Choose File] to select the Offer Packet you saved
    a. If you receive an error message that the file is too large, please see the Troubleshooting section for help

11. Click [Submit]

12. Click [Next >>]

13. Select the appropriate option for your department from [Take Action On Hiring Proposal]

### Edit a Returned Hiring Proposal

If an Approver determines that the Offer Packet attached to a Hiring Proposal requires edits, the proposal will be returned to the Initiator in PeopleAdmin and an email will be sent outlining required edits.

1. Make necessary changes to the offer packet documents
2. Save the revised offer packet

3. Click **Hiring Proposals** and select School of Medicine
4. Find the name of the applicant in the list
5. Hover over **Actions** in the right-hand column

6. Click Edit

7. Update *Job Start Date* if necessary
8. Click [Next >>]

9. Hover over **Actions**

10. Click Unassign
11. Hover over **Actions**

12. Chose Upload New
13. Click **Choose File**
14. Select your document
a. If the file is too large, please see the Troubleshooting section for assistance

15. Click Submit
16. Click Next »
17. Select the appropriate option for your department from Take Action On Hiring Proposal

Finalize Hiring Proposal

Offer Accepted
1. Send Offer letter and Offer Letter Enclosures to candidate once the Hiring Proposal is approved
2. Once the signed offer letter has been received from the candidate or if the candidate has declined the offer, move the Hiring Proposal to a Workflow State

3. Click Hiring Proposals and select School of Medicine
4. Find the name of the applicant in the list
5. Hover over in the right-hand column
6. Click View
7. Hover over
8. Select the appropriate Workflow Action
   a. The Workflow Action cannot be changed once saved so wait to make this selection until absolutely certain.
9. Click Submit in the dialog box

Offer Declined
1. Click Postings and select School of Medicine
2. Chose the posting from the list or type the title of the posting in the search box and click Search
3. Click on the Applicants tab
4. Click on the name of the applicant
5. Hover over and click Applicant Declined Offer (move to Declined Offer)
6. Click **Submit**

7. Contact the Faculty Recruiting Consultant assigned to your department in order to determine the most appropriate next steps

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### Final Transitions

#### Final Transition on Applicant

1. Click **Postings** and select School of Medicine
2. Choose the posting from the list or type the title of the posting in the search box and click **Search**
3. Click on the **Applicants** tab
4. Click on the name of the applicant
5. Hover over **Take Action On Job Application** and click **Hired (move to Hired)**
6. Click **Submit**

#### Final Transition on Posting

1. Complete the following steps once the Hire/Transfer eDoc has been submitted
2. Click **Postings** and select **School of Medicine**
3. Choose the posting from the list or type the title of the posting in the search box and click **Search**
4. Hover over **Take Action On Posting** and click **Position Filled (move to Filled)**

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### Troubleshooting

#### Viewing Draft Applications for a Position

*It may be helpful sometimes to know if anyone has started the application process for a position and not submitted.*

1. Go to the posting and click ‘Applicants’.
2. Click ‘More Search Options’ and check the box next to ‘Draft?’. Then hit the ‘Search’ button.

3. You will now see a list of any applications that have been started for the position.
4. Select the applicant you would like to review. You will see their entries into the application along with the missing or incomplete items, which will be designated by

File Too Large for Proposal
If the Offer Packet file is too large to be uploaded in the Hiring Proposal, open the PDF document

1. Click File
2. Hover over Save as Other
3. Select Reduced size PDF
4. Click ‘Ok’ in the pop up box
5. Save file to a local drive
6. Return to the Hiring Proposal to try the upload again