Shortlisting User Guide

Shortlisting is the process of updating the status of applicants throughout the search and hire process. This process is required for Human Resources (HR) to move forward with pre-employment checks. This process allows USI to remain compliant with our Affirmative Action Policy and better organization the search and hiring process.

The shortlisting process must be done for all applications received. The assigned HR Representative will verify that this process is complete before proceeding with a background check request.

The shortlisting process is only available to those that have been included in the **Direct Supervisor/Search Chair** field on the job card. Please ensure that whoever creates the job cards includes the appropriate person in the **Direct/Supervisor/Search Chair** field, so they have access to this feature. If needed, HR can update this field at any time.

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Navigation

From your dashboard, navigate to the **Applications** panel. Click on the **(#) Jobs have applicants for review** link.

From the above screen, navigate to the job you want to review and click **View shortlisted applicants (#)**.

Updating Statuses

From the above screen, you will see a list of applicants that have completed an application for the job posting. You can see each applicant's current status and update their statuses.

> 💡 **Tip:** You can update the columns you see by clicking on the hammer icon in the lower left-hand side of the screen.

Each level of the search and hiring process will have different statuses available. For each applicant, you will choose the appropriate status.

You may choose the structure of your selection process, as long as it remains consistent. You may not need to use every status option that is available.

The first level of statuses are:

- Phone Screen
- First Interview
- Reviewed, Did Not Progress
- Materials Received After Consideration Date, Did Not Progress

> ⚠️ **Notice:** The status **Materials Received After Consideration Date** is only used when a consideration date is added to the posting, and you are utilizing this for every applicant that applied after that date. If the search committee chooses to consider applicants past the best consideration date, they should do so consistently with all applicants.

Once you select the appropriate status from the drop-down menu in the **Selection Criteria Outcome** column, you will see the above message informing you that you have pending changes. Click the **Submit** button to confirm the changes.

> 💡 **Tip:** You can update multiple statuses at once, even if they are different, by making a selection from the drop-down menu in the **Selection Criteria Outcome** column for multiple applicants and waiting to click the **Submit** button until you have completed making your selections.

Once you have clicked **Submit** to confirm your changes, your screen will update. Now, you will see the current status has been updated and there is a new set of options for you to select in the **Selection Criteria Outcome** column.

Did Not Progress Statuses

If you select a status containing **"Did Not Progress"**, then you will have a new drop-down menu available for you to **Select a reason**. Select the appropriate reason. Once you are ready, click the **Submit** button

Please refer to section *Did Not Progress Reasons Guide* for help in identifying the appropriate selection.

Once you have clicked **Submit** for a **"Did Not Progress"** status and corresponding reason, your screen will update. As you can see in the above example, this is a terminal status outcome, so the **Selection Criteria Outcome** column does not give you any further options.

All applicants must have a terminal status entered, meaning there are no additional options that appear for the **Selection Criteria Outcome** column. This will ensure that HR can appropriately notify all applicants that were not selected and then be able to close the position.

⚠️ **Notice:** Choosing an applicant status, even if it is a terminal status, will not notify the applicant. HR will process all applicant notifications once you have completed shortlisting and your finalist candidate has accepted the job offer.

Launching Personal References

Once you have completed the final round of interviews and selected a finalist, you may launch personal references from the shortlisting screen. This option is only available after the applicant has had a current status of first, second, or third interview. When you are ready, click the **Submit** button.

⚠️ **Caution:** When you click the **Submit** button, the system will automatically email the reference survey to all personal references the candidate included on their application. This action cannot be undone.

The current/most recent supervisor reference will continue to be conducted via phone. If any additional reference checks are needed, they will occur outside of the system at this time. Only the personal references can be conducted through the survey in PageUp.

Recommendation to Hire

After you update the finalist's status to **Launch Personal References** and click **Submit**, you may then update their status to **Recommendation to Hire**. Click the **Submit** button for that status update to take effect.

When an applicant is moved to the **Recommendation to Hire** status, the assigned HR Representative will receive an email notifying them of this update. The HR Representative will then initiate a background check. The job posting will be removed from the USI careers website at this time and will no longer be accepting new applications.

> ⚠️**Notice:** The remainder of the pre-employment check and hiring process remains the same at this time. There will be additional updates to the offer stage through PageUp at a later date. Further instructions will be released as we near that phase of the PageUp implementation.

Did Not Progress Reasons Guide

If you select a status containing **"Did Not Progress"**, then you will have a new drop-down menu available for you to **Select a reason**. Please use the following information to help you identify the appropriate reason to select.

Reason	When to Use
Not Reviewed, Application Submitted After Best Consideration Date	When a consideration date is added to the posting, and you are utilizing this for every applicant that applied after that date. If the search committee chooses to consider applicants past the best consideration date, they should do so consistently with all applicants.
Failed to Submit a Complete Application	Applicant did not satisfy all application requirements (Ex. transcript missing)
Does Not Meet Minimum Qualifications • Education • Experience • Lacks License/Certification • Scholarship	Applicant was reviewed but did not meet at least one minimum qualification. Applicants must meet **ALL** minimum qualifications in order to be considered for the job.
More Qualified Applicant Selected Due to • Education • Experience • Lack of Scholarship	Applicant was reviewed and met all minimum qualifications, but other applicants were more qualified. These statuses can be used whether the applicant was interviewed or not.
Not Best Qualified • Did Not Respond to Questions Fully or Clearly • Could Not Complete References • Falsified Information or Misrepresented Knowledge and Skills • Lacks License/Certification • Unsatisfactory References	Applicant was reviewed, met all minimum qualifications, they were screened or interviewed but not selected.
Withdrawn • Accepted Another Position • Job Duties • Pay • Personal Reasons • Not Willing to Relocate	Applicant was reviewed, met all minimum qualifications, they were contacted or screened/interviewed but voluntarily chose to withdraw their application from consideration.
Offer Declined • Pay • Job Duties • Accepted Another Position • Location of Position • Not Willing to Relocate • USI does not pay to relocate	Applicant was reviewed, met all minimum qualifications, they were interviewed and selected as a finalist, they were offered the position but declined the offer.

Reason	When to Use
No Show for First Day	Applicant was reviewed, met all minimum qualifications, they were interviewed and selected as a finalist, they were offered the position but did not show for the start date that was agreed upon.
HR ONLY • Current Employee – Not Eligible for Promo or Trans • Family Member is Supervisor/Hiring Manager • Former Employee – Not Eligible for Rehire • No Work Authorization • Unsatisfactory Pre-Employment Screening	Do not use these statuses. Only members of HR will use these statuses when appropriate.

Example Shortlisting Scenarios

Scenario 1

Hiring process structure is:

1. Phone Screen
2. First Interview (Video/Phone)
3. Second Interview (In Person)
4. Pre-employment Screening
5. Offer

For the candidate that is **offered** the position, you will choose the following statuses in the displayed order:

1. Phone Screen
2. First Interview
3. Second Interview
4. Launch Personal References
5. Recommendation to Hire

For the **finalist** candidates that are **not offered** the position, you will choose the following statuses in the displayed order:

1. Phone Screen
2. First Interview
3. Second Interview (In Person) Did Not Progress
   a. Select a reason

For **interviewed** candidates that **did not progress** to the second interview, you will choose the following statuses in the displayed order:

1. Phone Screen
2. First Interview (Video/Phone) Did Not Progress
   a. Select a reason

For **phone screened** candidates that **did not progress** to the first interview, you will choose the following statuses in the displayed order:

1. Phone Screen, Did Not Progress
   a. Select a reason

For applicants that were **not interviewed**, you will choose the following statuses in the displayed order:

1. Reviewed, Did Not Progress
   a. Select a reason

Scenario 2

Hiring process structure is:

1. First Interview (In Person)
2. Pre-employment Screening
3. Offer

For the candidate that is **offered** the position, you will choose the following statuses in the displayed order:

1. First Interview
2. Launch Personal References
3. Recommendation to Hire

For the **interviewed** candidates that are **not offered** the position, you will choose the following statuses in the displayed order:

4. First Interview
5. First Interview (In Person) Did Not Progress
   a. Select a reason

For applicants that were **not interviewed**, you will choose the following statuses in the displayed order:

2. Reviewed, Did Not Progress
   a. Select a reason