Recruitment, Assessment, and Selection (RAS) Procedure

Procedure Detail

This procedural document outlines guidelines and processes to implement the University of Wisconsin – Madison Recruitment, Assessment, and Selection Policy. The Policy applies to recruitment, assessment, and selection of Academic, Faculty, Limited and University Staff employees*.

Direct-Hire Waiver Process

Open recruitment for specific Academic, Faculty, Limited, Temporary and University Staff vacancies is not required when certain criteria are met. All waivers of the recruitment process must be approved by OHR before the position is offered. Waivers are used in situations when it is helpful to do a direct hire of an otherwise qualified applicant (e.g., example temporary, acting or interim appointments to fill a vacancy or when an employee goes on leave) Appendix 1 is the complete list of waiver reasons.

Recruitment, Assessment, and Selection Process

I. Meet Pre-Recruitment Requirements

a. For University Staff vacancies only.
   i. Blue-collar multi-shift vacancies. If a position designated as blue-collar multi-shift becomes vacant, hiring administrators must first offer a transfer opportunity to one of the two most-senior employees who apply and meet all criteria. (Please refer to the Blue-collar multi-shift procedure - Appendix 2).
   ii. Reemployment after layoff. OHR will notify a division when a vacancy requires notification or mandatory placement of a laid-off employee, which must occur before proceeding with an open or internal recruitment.
   Refer to: https://kb.wisc.edu/ohr/policies/page.php?id=53353

b. For Academic Staff vacancies only
   i. Referral priority. Opportunity for a laid-off employee or for long-term Academic Staff (i.e., those holding Academic Staff appointments for six of the last seven years) non-renewed for reasons other than performance to be considered for a vacancy prior to proceeding with an open or internal recruitment.
   (Refer to Academic Staff layoff policy on reappointment after layoff and referral priority services (ASPP 5.09), and Academic Staff non-renewal policy on reappointment after non-renewal and referral priority services (ASPP 3.06)

II. Select Most Effective Recruiting Strategy

UW-Madison uses different recruitment methods to support best-qualified selection, diversity and fairness. The hiring administrator should use the OHR-developed recruitment, assessment, and selection checklist to ensure that each step of the process is completed (refer to the Talent Recruitment and Engagement (TRE) Toolkit). Hiring administrators should evaluate each vacancy to determine which of the following recruitment approaches to use (for Faculty recruitments, refer to Searching for Excellence and Diversity: A Guide for Search Committee Chairs):

a. Standard Recruitment. In the vast majority of recruitments, this process will be used to publicly post vacancies, and applications are accepted from all interested applicants. Hiring administrator screens applicants for minimum requirements using a consistent, job related and non-discriminatory methodology. (See Standard Recruitment Flowchart for Academic, Limited and University Staff on the TRE Toolkit).

b. Centralized Recruitment (University Staff vacancies only). For specified vacancies with high volume applicant pools, applications can be accepted from all interested applicants. OHR conducts the initial screening of applicant materials, based on minimum requirements, before sending eligible applicants to the hiring administrator. OHR conducts periodic reviews of campus-wide recruitment efforts to determine titles that are appropriate for centralized recruitment (See Centralized Recruitment Flowchart for University Staff on the TRE Toolkit).

c. Internal Recruitment. For limited situations (unique skills or business need), this process can be used when it is necessary for the University to consider only current university employees (and eligible former employees). Internal recruitment focuses recruitment and selection efforts on current UW-Madison staff to provide employees development and/or advancement opportunities. Internal recruitment encourages and supports employees to explore career mobility options and reach their full potential at UW-Madison. (See Internal Recruitment Flowchart for Academic, Limited and University Staff on the TRE Toolkit)

   i. Internal recruitment is a competitive hiring process that includes all open recruitment requirements except that the applicant pool is internal, and that the vacancy is posted on an internal job board for a required minimum period of seven calendar days. The use of internal recruitment must be balanced with the goal of increasing diversity. Therefore, internal recruitment for underutilized positions requires additional review and approval.

   ii. Approval requirements

      1. Non-underutilized positions – Internal recruitment is delegated to divisions and does not require OHR approval.
      2. Underutilized positions - Internal recruitment for underutilized positions is not delegated to divisions. It requires additional justification and approval by OHR, in consultation with the Office of Equity and Diversity (OED). A division's justification must include an analysis of division and campus employee demographics in the specific title series, as well as any of the following:
         - Funding/FTE restrictions
         - Likelihood of attracting a qualified and diverse applicant pool

   iii. Guidelines for use

      1. Each division is responsible for developing an overall plan for recruitment ("Recruitment, Assessment, and Selection Plan"), including determining when internal recruitments are appropriate. These plans should balance the need to enhance diversity with offering development and/or advancement opportunities to current staff. OHR can assist divisions in evaluating recruitment options.
      2. The majority of recruitments should be standard (open) recruitments, but there are instances where internal recruitment is appropriate:
         - If there is a qualified and diverse applicant pool, the division may elect to recruit internally within the UW-Madison campus (preferred), or within the division (limited). A qualified applicant pool means there are likely to be at least three applicants to be interviewed. If there are not likely to be at least three applicants that meet minimum qualifications, the division should consider proceeding with a standard recruitment.
         - If the division budget cannot fund a new FTE and the division must hire from within without backfilling, the division may elect to recruit internally, from within the division.
         - If the division has a "Limited" position vacancy which requires a concurrent

Faculty or Clinical/CHS track appointment, the division may elect to recruit internally within the UW-Madison campus (preferred), or within the division (limited).

iv. Eligible internal applicant pool
1. All employees with active UW-Madison paid appointments, regardless of appointment type or title (e.g., active AS, EIT, SA, SH, TE, and US)
2. Former employees who are eligible to apply for internal recruitments. For a period of 12 months after end date of employment, eligible applicants would be former employees who:
    - Were laid-off or non-renewed due to funding, budget, or program redirections
    - Qualified for reassignment as an accommodation and were subsequently terminated
    - Passed probationary periods in positions on campus (regardless of whether they failed probation in any subsequent positions)
    - Completed internship programs
3. If the recruitment is limited to the division, only current or former employees from that division can apply.
4. Former employees who were terminated due to misconduct or delinquency are not eligible to apply for internal recruitments

v. Consequences for noncompliance. In consultation with the OED, OHR can remove delegation for internal recruitments if a division does not comply with these guidelines.

d. Once the most effective recruiting strategy is selected, the hiring administrator should use the recruitment, assessment, and selection checklist developed by OHR to ensure that each step of the process is completed (See Recruitment, Assessment, and Selection Checklist on the TRE Toolkit).

III. Develop Assessment Criteria and Benchmarks

Hiring administrators are encouraged to use a variety of assessment tools which include but are not limited to: minimum qualification reviews, work history reviews, résumé reviews, structured interviews, and reference checks.

IV. Advertise and Recruit for the Position

a. It is ultimately the hiring unit's responsibility to recruit for a vacancy. Passively posting or advertising a vacancy is not enough to attract the best pool of candidates. Recruiting widely and aggressively can attract a diverse pool of qualified candidates.
b. The OHR Talent Recruitment and Engagement unit consults with units on Recruitment Efforts Plans (REP) and provides training on recruiting techniques to support hiring administrators and managers to effectively recruit.
c. Proactive strategies include but are not limited to attending recruiting fairs, leveraging professional network affiliations, and using social media.
d. Recruitment Efforts Plan (REP). For specified Academic, Faculty, Limited, and University Staff vacancies, a REP must be approved by the UW-Madison Office for Equity and Diversity (OED) to outline the proposed recruiting efforts and help ensure a diverse pool of applicants. The hiring administrator completes a REP in the Job and Employee Management System (JEMS). OED must review and approve each REP. A REP is required for the following:
    i. Vacancies with Faculty and CHS Faculty titles
    ii. Vacancies with a stated salary at or above the minimum of category A, salary range 8 http://www.ohr.wisc.edu/polproced/UTG/

iii. Vacancies with a title identified as underutilized for women or minorities (Refer to the TRE Toolkit and refer to the OED site http://www.oed.wisc.edu/reports- and-forms.htm for more information).

e. Advertise a vacancy. Advertising includes many activities, some of which can be low or no-cost.
   i. As a best practice, advertisements contain the following language whenever possible:
      UW-Madison is committed to providing opportunities to people from all backgrounds to help create a welcoming, empowered, and inclusive community. UW-Madison encourages women, minorities, veterans, and people with disabilities to apply.
   ii. At a minimum, all advertisements are required to contain the following language:
      UW-Madison is an affirmative action/equal employment employer and we encourage women, minorities, veterans, and people with disabilities to apply.

f. Advertise a Vacancy to Allow Filing of Permanent Residency Petition. For certain title series which have a formal teaching component (Professor, Faculty Associate, and Clinical and CHS titles), advertisements must meet certain U.S. Department of Labor (DOL) standards. Failure to place an advertisement that meets these standards will prohibit the University from being able to file a permanent residency petition related to that position at a later date. Refer to the following link (http://www.ohr.wisc.edu/ifss/PR/labor_Certification_Instructions201503.pdf) for more information about these advertising requirements for these title series:
   i. Advertisements must clearly state the title, duties and minimum education, training and experience requirements (and not just a link to the PVL) and must be placed in a journal of national circulation.
   ii. Advertisements must specify the field or fields of study required for the position (such as "Ph.D. in Mechanical Engineering or related field" and not just "Ph.D. required").
   iii. As a best practice, it is recommended that advertisements contain the word "teach" (as opposed to "train," "instruct," or "further the education mission").

g. Post the Vacancy.
   i. The following are required minimum posting periods for standard recruitments:
      1. 30 calendar days for Faculty, CHS Faculty, Deans, and Limited vacancies that require hiring a candidate who is tenurable.
      2. Four weeks for other vacancies with a stated salary at or above the minimum of Category A, Salary Range 8.
      3. Two weeks for all other vacancies (exception: coaches may be posted for one week).
      4. Temporary Employee (TE) vacancies may be posted for a minimum of one week.
   ii. The required minimum posting period for internal recruitments is one week (seven calendar days).
   iii. Hiring administrators will ensure that all applicants who submit all required application materials by the close date will be guaranteed consideration. Consideration does not necessarily mean that an applicant will be interviewed.

h. Use of Third-Party Recruiters or Search Firms.
   i. Hiring units may use third-party recruiters or search firms to broaden the scope of the search and generate well – qualified diverse candidate pools for senior level positions and for difficult to fill positions. The hiring unit, at its sole discretion, is responsible for the selection and retention of the search firm services, as well as all expenses incurred as a result of the contract. Divisions are encouraged to utilize the vendors contracted through the University

System and the Big Ten Purchasing Consortium's Contract 109, and follow contract terms and conditions. If the hiring unit is seeking to use a search firm that is not part of these contracts, the hiring unit must work with UW Purchasing to ensure the proper processing of the contract. The hiring unit must notify Talent Recruitment and Engagement in order to ensure the proper collection of application materials and follow recruitment protocol via the applicant tracking system.

V. Assess the Applicant Pool and Select the Best-Qualified

a. Evaluating Minimum Qualifications. It is the hiring administrator's responsibility to screen out applicants who do not meet any stated minimum requirements. Considering applicants who do not meet the minimum qualifications outlined in the posting requires OHR approval.

b. Secondary Assessment. If applicable, after the hiring administrator has screened for minimum qualifications a secondary screen of work history, résumé, or other application materials should be conducted based on pre-determined, job related and nondiscriminatory criteria and benchmarks.

c. Testing. In some situations, hiring administrators may wish to use a scored test to evaluate candidates. All such scored tests must directly relate to the work that will be performed. The hiring unit must consult with OHR on developing and using scored tests.

d. Interviews. UW-Madison, at its sole discretion, may select the candidates to interview for vacancies. Hiring managers are encouraged to interview at least three candidates for each vacancy. Questions asked guide the interview so that critical competencies/requirements are consistently covered with each candidate. UW-Madison recognizes, however, that conversations during interviews will naturally evolve and provide varying levels of information. This is often a direct reflection of a candidate's background and potential fit for a position. Hiring managers can therefore consider all information collected during an interview when determining which candidate is best suited for the position. However, hiring managers cannot ask about or consider information that includes, but is not limited to, sex, race, color, national origin, sexual orientation, creed, religion, age, marital status, disability, genetic information, political affiliation, ancestry, or demographic or other data limited by state or federal laws.

e. Reuse of Established Applicant Pools. Hiring administrators are encouraged to conduct an open recruitment for each vacancy. For University Staff positions, however, assessment and interview results may be used to fill secondary vacancies in the same title in the same operational area for a period of six months from close dates. The UW Police Department's reuse of an established Police Officer applicant pool will be up to 12 months from close dates to align with the industry standard for protective services. For Academic Staff, Faculty and Limited, some reuse of established applicant pools is allowed, but only under the same Position Vacancy Listing (PVL). Hiring administrators must consult with their unit OHR representatives to discuss this option.

f. Reference Checks. Hiring units must always check references for finalists and this information must be considered along with other assessment data.
   i. Open-ended questions usually elicit more useful information than those that can be answered with just yes or no.
   ii. A hiring administrator must inform finalists that references will be checked, which may include the possibility of checking references not provided by the finalist. The hiring administrator, supervisor or HR staff, as a best practice, should contact current or former supervisors even if supervisory references were not provided by the finalist.
   iii. If a hiring administrator is seriously considering a candidate who is a current or former UW employee, the hiring administrator, supervisor or HR staff, as a best practice, should conduct an internal reference check. The division HR office will contact OHR if the employee's personnel file is maintained by OHR. If so, OHR will provide pertinent information from the file to the division HR representative. Hiring administrators are encouraged to check relevant

HR systems [(e.g., HRS (Human Resources System), EPM (Enterprise Performance Management System), or Interactive Query Library)] to obtain available historical employment data on a finalist.

g. Criminal Background Checks.

   i. Divisions are expected to complete appropriate criminal background checks before making a job offer. If a unit cannot complete the check before making the offer, the check must be completed before the candidate begins employment unless the dean or director grants an exception. Activities relating to conducting appropriate criminal and other background checks are governed by the Criminal Background Check policy.

VI. Make the Job Offer

a. After the hiring manager selects the best-qualified candidate, it is the hiring administrator's responsibility to move the candidate through the job offer and hiring process.
b. All employment offers are contingent upon verification of the information that the candidate provided during the assessment and selection process, completion appropriate criminal background and other checks as needed, and verification of employment [(Employment Eligibility Verification (I-9)].
c. Deviating from the approved terms and conditions in the position announcement requires OHR's prior written approval.
d. Initial Probation (Academic and University Staff only). Hires must serve an initial evaluation or probationary period unless otherwise notified in writing. Please see the following link for policies governing the probationary or evaluation period: (refer to the academic and university staff probation policies).

VII. Close the Vacancy

a. Notify Unsuccessful Candidates. Consistent with UW-Madison's principles that we should notify candidates promptly, hiring administrators should inform applicants of their status throughout the recruitment, assessment, and selection process.
b. Remove the posting and advertisements
c. Affirmative Action Review Form requirements:
   i. For University Staff hires: affirmative action data will be collected when the applicant applies
   ii. For Faculty, Limited or Academic Staff hires:
      1. Affirmative action data will be collected when the applicant applies, but an Affirmative Action Review Form must be completed if underutilization exists in the position or job group being filled, and an underutilized protected group member was not recommended.
      2. The original completed form must be sent to the division HR representative. For Faculty positions, the Dean's signature is also required. See the following link for more information: http://www.oed.wisc.edu/forms.html.
d. Retain Records as required. The hiring administrator must retain all required recruitment, assessment, and selection documents as needed, at the end of the process (see Documenting the Search – Appendix 3).

***Faculty**

Specific items related to Faculty are included in the following sections of this document:

- IV. Advertise and Recruit for the Position -- b) Recruitment Efforts Plan (REP), d) Advertise a vacancy to allow the filing of a permanent residency petition, and e) Post the Vacancy;

- V. Assess the Applicant Pool and Select the Best-Qualified -- e) Reuse of Established Applicant Pools;
- VII. Close the Vacancy -- Affirmative Action Review Form requirements.

Supporting Tools

UW-Madison Office of Human Resources

- Talent Recruitment and Engagement Toolkit: OHR maintains an online toolkit to support hiring administrators in communicating effectively with prospective employees and completing the recruitment, assessment, and selection process in an efficient, effective and compliant manner. The toolkit includes sample communications and template letters; advertising options, sources and best practices; assessment tools; process checklists; reference checks and many other resources that can be used throughout the process.
- Training related to Recruitment, Assessment, and Selection (see OHR Home Page)
- Job applicant interview reimbursement process (see http://www.bussvc.wisc.edu/acct/policy/travel/interview.html)

Appendices

Appendix 1: Direct-Hire Waiver Reasons

Appendix 2: Blue Collar Multi-Shift

Appendix 3: Documenting the Search

Links

University of Wisconsin – Madison Recruitment, Assessment, and Selection Policy

ASPP 3.06 Referral Priority (ASPP Chapter 3)

ASPP 5.09 Reappointment Rights and Referral Priority (ASPP Chapter 5)

University Staff Probationary Period Policy

Dual-Career Couple Assistance Program

Unclassified Search Records Information Sheet

Criminal Background Check

Appendix 1: Direct-Hire Waiver Reasons

Direct-Hire Waiver Reasons

All waivers of the recruitment process must be approved by the OHR before the position is offered. Open recruitment for Academic, Faculty, Limited, Temporary and University Staff positions is not required when one of the following criteria is met:

a. Appointments of 25 percent full-time equivalent or less – used for Academic and University Staff appointments at 25 percent FTE or less. The candidate does not need to be a current UW employee.
b. Fixed-term Terminal/Finite positions with duration of two years or less – used for Academic and University Staff Fixed-term Terminal/Finite appointments that will not exceed two years in length.
c. Temporary acting appointments – used for Academic Staff and Limited Terminal appointments, up to two years, to meet interim university needs. Typically reserved for high-level administrative positions other than faculty and used until recruitment is completed.
d. Leave of absence temporary replacement (ADA, FMLA, other) – used for Academic, Limited and University Staff when a terminal appointment is used to fill a position when an employee goes on paid or unpaid leave and a replacement is necessary until the incumbent returns. Typically used for medical leaves. NOTE: If the incumbent terminates employment and does not return, an open recruitment is necessary to fill the position.
e. Training completion for Post Degree Training titles – used for Post Degree Training appointments, formerly Employees-in-Training (EIT), who have completed their training and are being appointed to an Academic Staff position in the same UDDS in which they have held the Post Degree Training position for at least 1.5 years. This waiver reason only applies to Research Associate and Postdoctoral Fellow/Trainee within the Post Degree Training titles.
f. Referral priority/reemployment of individuals impacted by layoff – used to employ former or current employees who have been impacted by layoff within the timeframe specified on their official layoff notifications. The referral priority/reemployment process applies to employees who have had their employment terminated (only applies to non-performance related) or who have been officially notified their positions will be eliminated due to funding, budget, or program redirection.
    i. Academic Staff candidates with referral priority status should be given special consideration for the vacancy. (See ASPP 3.06 Referral Priority and ASPP 5.09 Reappointment Rights and Referral Priority)
    ii. University Staff candidates who have had their employment terminated due to layoff have the right to mandatory placement into positions specified on their official layoff notifications, provided they are qualified to successfully perform the essential position duties.
    iii. University Staff candidates who are, or were, in exempt-level positions now filled using Academic Staff titles will have referral priority status and should be given special consideration for Academic Staff positions. https://kb.wisc.edu/ohr/policies/page.php?id=53353
g. Rehired annuitant – used to employ Academic, Limited, and University Staff who are retired UW-Madison employees. This waiver reason must be used in accordance with the UW-Madison rehired annuitant policy.
h. Sole source – used for Academic and Faculty Staff positions created to employ a specific candidate

due to unique circumstances, or for a candidate who has unique credentials that allow only him or her to perform the position duties at an exceptional level. These situations are extremely rare. Examples may include the following:

i. Position would not otherwise exist: the candidate identified on the direct-hire request must be the direct recipient of grant or other funding for the position. This does not apply to individuals named as co-Principal Investigators or otherwise identified in the grant.
ii. Unique credentials: the candidate identified on the direct-hire request has specific, hard-to-find, and unique skills or experience that allows only that person to perform the duties of the job. It must be commonly accepted that there are only a few people who possess the necessary credentials, so there is no value in recruiting.
iii. New research lab: when a new research lab is moved to UW-Madison from another institution, all existing employees working on that laboratory may be hired using the sole source waiver reason.

i. Spousal or partner hire – used for Academic, Faculty, Limited, and University Staff to employ or retain an employee by hiring the spouse/partner. Approval for spousal or partner hire waivers is contingent on the primary spouse/partner accepting employment with UW-Madison or continuing in the current position.
j. Dual role (Academic staff only) – This waiver reason is used to hire a current academic staff employee in a science/research position, into a second appointment in teaching/instructional work, or vice versa (for example, appointing a Scientist into a second appointment as Lecturer). Approval of this waiver is contingent upon prior approval of the University Committee, to ensure that the distinction between faculty – whose responsibilities include instruction, research, outreach, and administration – and academic staff (whose responsibilities typically are limited to one of those areas) remains clear. For more information see Secretary of the Faculty.
k. Official internship or competitive fellowship programs – interns, fellows, or trainees may be hired into Academic and University Staff appointments after completing internships, fellowships, or training programs
l. Veteran – used when hiring any veteran with a documented 30 percent or more service-connected disability. This waiver requires consultation with OHR to ensure documentation has been received and validated by The Office of Veterans Services
m. Summer service – this fixed-term terminal waiver reason is used for work done during the summer. Pay basis must be summer service.
n. Summer session – this fixed-term terminal waiver reason is used for work done during the summer. Pay basis must be summer session.
o. Faculty to Academic Staff/Academic Staff to Faculty (FA to AS/AS to FA) – used when moving from a Faculty appointment to Academic Staff and vice versa. This is primarily used by divisions for their "track transfers." Divisions have guidelines that allow the movement between clinical professor, CHS professor, and tenure track. Movement between CHS/clinical and tenure track Faculty appointments involves changing from Empl Class AS to FA or vice versa. OHR allows these appointment changes through the waiver process after the appropriate division and campus committees approve the change.
p. Position conversion (US to AS/AS to US) – used when position duties change from nonexempt to exempt resulting in a move from University Staff (nonexempt) to Academic Staff or Limited (exempt); or when position duties change from exempt to nonexempt resulting in a move from Academic Staff or Limited (exempt) to University Staff (nonexempt).
q. Reactivate backup appointment – used when reactivating a Limited Employee's Academic and University Staff back-up appointment.
r. Employee choice - US to AS – used when employee moves from exempt University Staff to Academic or Limited Staff.

s. International employment rehires – used for Academic, Faculty, Limited, and University Staff in cases where an existing employee's credentials (work visa, H1B, etc.) expire and the employee must end employment. After appropriate credentials are reestablished, the employee may be rehired using this waiver reason with the approval of the Office of International Faculty and Staff Services (IFSS).
t. US Fixed Term Finite to US Ongoing – used to place an existing University Staff Fixed-term Finite employee into an ongoing University Staff position. The employee needs to have been initially hired via standard or internal recruitment, with a vacancy posting which included language stating that the position may convert to an ongoing appointment in the future.
u. Other – used in other situations when a direct hire waiver is approved by OHR (e.g., University Staff 30-day right to return, reassignment due to reorganization, employee who qualifies for transfer as disability accommodation, or movement to a lower position due to performance).

Appendix 2: Blue Collar Multi-Shift

Blue Collar Multi-Shift

For University Staff vacancies only.

I. Blue-collar multi-shift vacancies

a. If a position designated as blue-collar multi-shift (BCMS) becomes vacant, the division must post the initial vacancy internally before moving to open recruitment. The hiring administrator must first offer a transfer opportunity to one of the two eligible most-senior employees who apply. Seniority is defined as time worked for the division. Employees who transfer to these blue-collar multi-shift positions will not serve a probationary period.
b. The division is responsible for managing the BCMS transfer process. Work units will identify vacancies eligible for BCMS based on positions with similar functions in which employees work different hours. The Office of Human Resources (OHR) will be responsible for managing the candidate ranking process through the Job and Employee Management System (JEMS).
c. The two most-senior interested employees must meet both of the following criteria to be eligible for the vacancy:
    i. Currently employed in the same title within the division
    ii. Minimally qualified for the position
d. Employees would not be eligible for transfer if they meet any one of these criteria:
    i. Received one or more disciplinary letter(s) within the previous 12 months.
    ii. Transferred via the BCMS process within the last six months
    iii. Are currently serving a probationary period
e. There are instances in which the BCMS transfer process would not be required. Changes in work location or schedule (e.g., granting flex time or a deviated work schedule) would not be defined as a vacancy. In addition, vacancies generated as a result of a blue-collar multi-shift transfer appointment would not require use of BCMS to fill. Units must fill vacancies in the following order:
    1. Blue-collar multi-shift transfer process
    2. Reemployment after layoff
    3. Recruitment (standard, internal, centralized)

II. Blue collar multi shift process

a. Divisions/departments enter a vacancy into JEMS Classified Human Resources Information System-Human Resources (CHRIS-HR), check the multi-shift box, and follow the electronic approval process. The JEMS CHRIS-HR system will not post the vacancy to the employment website.
b. Once approved, the vacancy is posted as a BCMS transfer opportunity on UW-Madison's internal website and within the division/department for seven calendar days.
c. Employees in the same title within the division submit paper or electronic transfer forms.
d. OHR enters all interested employee names into the JEMS CHRIS-HR system.
e. The JEMS CHRIS-HR system ranks the employees by their division seniority date.
f. Notices will be sent to all employees who were not the top two employees, based on service dates,

informing them they are not eligible to be considered based on seniority.

g. The hiring administrator selects an eligible candidate from the two most-senior interested employees.
h. The division enters reports of action (ROAs) into the JEMS CHRIS-HR system and informs the employee who was not selected of the reason for non-selection.
i. If a selection is not made from the two most-senior interested employees, the division can post the job on the employment website for standard, internal, or centralized recruitment.

Appendix 3: Documenting the Search

Documenting the Search

Division Human Resources, in collaboration with hiring administrators and search committees, must document searches to ensure compliance with UW-Madison and U.S. Department of Labor records retention requirements. Information documenting recruitment and selection procedures must be retained for all hires.

School, colleges and divisions must maintain records documenting the following information for a period of six years from the date the position is filled.

Recruitment Files can be stored electronically or as hard copies, so long as documents can be retrieved when requested. If used accordingly, the Talent Recruitment & Engagement Management System (TREMS) captures and stores many of the required items, which are indicated with an * below. Documents not automatically stored in TREMS (un-asterisked items) can be uploaded to the job posting or applicant card if the school/college/division chooses to use TREMS to house the recruitment file.

Among the records that must be retained are the following:

a. the names of all members of the search committee and who served as chair;
b. copies of the position description and announcement from the UW-Madison employment website;
c. documentation of blue-collar multi-shift process (if applicable);
d. copies of the Recruitment Efforts Plan (can be stored in JEMS), advertisements, press releases, and other publicity materials and outreach activities;
e. assessment and screening criteria;
f. list of applicants*;
g. candidate materials for example cover letters, work history, resumes/curriculum vitae, transcripts, recommendation letters, reference list, reference check materials, and copies of correspondence with individual applicants*;
h. sample correspondence or templates of emails/letters sent to applicants (primarily needed if not communicating through TREMS);
i. list of interviewees* and interview questions;
j. evaluations of candidates as applicable:
    i. copies of applied assessment or screening tools;
    ii. movement of candidates at each step* (status changes);
    iii. evaluations of candidates who are interviewed (individual interview notes are not to be shared no kept in the recruitment file, but the file should contain a summary of the interviews);
    iv. reasons why candidates were not referred for selection*;
    v. reason for selecting the finalist
k. copy of offer letter*
l. documentation of decline offers*

While search committees are not required to retain minutes of their meetings, these may prove valuable in reconstructing the search process in case information on the recruitment is requested. The minutes should include the dates the committee met and the dates when contacts were made with applicants.