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1
Accessing the Position Management/Recruitment Portal
A portal page for Position Management and eRecruit has been developed to ease system navigation. To access this page, log in to www.msp.ubc.ca using your CWL login credentials. Once logged in, click on the Management Systems Portal radio button:
1.2 The Management Systems Portal

Once logged into the Management System Portal, select the Administrator Self-Service tab to access the portal (alternatively you can click on the HRMS Live or HRMS Reporting hyperlinks in the Applications tab if you wish to bypass the portal navigation page below).

Select Position Management from the Administrator Self Service portal page. Once in PeopleSoft you can choose to use the PeopleSoft Navigation Menu (below), or return to the Portal page to navigate to different areas within the recruitment process.
2
Position Management
2.1 Position Management Defined

What is position management?

- Position Management is the starting point for creating a job opening/posting.
- Position management maintains both Human Resources and Budget information for every authorized Faculty and Staff position (positions are optional for student positions).
- Defines Human Resources by position, rather than by employee.
- Defines key attributes of a position such as position number, department, job code, business title, FTE and reporting relationships. Job descriptions and Faculty job ads can also be attached to the position, facilitating the recruitment process in eRecruit.
- Defines funding distribution of a position such as funding effective dates and associated speedchart, for both salary and benefit expenses.

Why is it important? What are the advantages?

- Provides the ability to manage the University’s workforce by position, in addition to employees occupying those positions.
- Streamlines processes for recruiting and hiring Faculty and Staff.
- Provides committed budget funding and salary expenses for both filled and vacant positions.
- Fully integrated with UBC’s PeopleSoft HRMS and Oracle Hyperion budget system.
- Provides organizational reporting structure by position, which can then be linked to employees occupying those positions.
- Improved reporting and turnover analysis.
2.2 Create a New Position


2.2.1 Find an existing position or add a new position

- Click on the magnifying glass icon for a list of valid values.
- Enter fields in order that they appear.
- When creating a new position, fields entered here may be changed later in the position management pages.
Search results page indicating that no existing positions exist which match your selection criteria.

**Note:** If a position is retrieved, review the position to see if it can be used before creating a new one.

Add/Update/Copy Position

No matching values found. Click on the 'Add New Position' button to create a new Position.

Add New Position  |  Back to Search Page

Click on **Add New Position** to proceed.
2.2.2 Enter Position Information

<table>
<thead>
<tr>
<th>Position Information</th>
<th>Job Description/Ad</th>
<th>Approvals</th>
<th>Budget</th>
<th>Incumbents</th>
<th>Attach Documents</th>
<th>Join Position</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position Number</strong>: NEW</td>
<td><strong>Created By</strong>: Kathy Broudeau</td>
<td><strong>Created On</strong>: 01/30/2013</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Position Information**

- **Event**: 1. Add New Position
- **Event Start Date**: 01/30/2013
- **Sequence**: 0
- **Date Entry Date**: 01/30/2013
- **Last Updated By**: Kathy Broudeau
- **Will you be posting this position?**: [ ]

**Required fields are preceded by an asterisk *

- **Event**: Select appropriate event.
- **Event Start Date**: Use the earliest date this position could be filled (field defaults to current date so remember to change it! (see page 25 for important information about this date field).
- **Sequence**: System defaults in this value for you; it’s usually set to zero.
- **Data Entry Date**: Date that the event was data entered.
- **Last Updated By**: Shows the name of the person who created the position.
- **Will you be posting this position?**: Select if you’re planning to post your job in UBC’s eRecruit system immediately or in the near future. This field will invoke approval workflow for some positions.
- **Position Status**: Active/Inactive.
- **Overall Position Approval Status**: Indicates the overall approval status of the position (e.g. faculty job ad).

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending Approval</td>
<td>Pending both central and departmental approval</td>
</tr>
<tr>
<td>Draft</td>
<td>When user selects 'Save for Later'</td>
</tr>
<tr>
<td>OK for eRecruit and ePAF</td>
<td>All necessary approvals have been obtained; position can be used in ePAF and eRecruit</td>
</tr>
<tr>
<td>Pending Department Approval</td>
<td>Position is out for departmental approval</td>
</tr>
<tr>
<td>Pushback from Department</td>
<td>Departmental pushback</td>
</tr>
<tr>
<td>Pending Central Approval</td>
<td>Position is out for central approval</td>
</tr>
<tr>
<td>Pushback from Central</td>
<td>Central pushback</td>
</tr>
<tr>
<td>OK for ePAF only</td>
<td>Departmental approvals have been received and position can be used in ePAF. Department has not requested Central Approval (Staff Job Description or Faculty Job Ad either doesn't exist or if it does, approval hasn't been requested)</td>
</tr>
<tr>
<td>Saved without Approval</td>
<td>When user selects ‘Save’.</td>
</tr>
</tbody>
</table>

- **Central Approval Status**: Indicates the approval status of the central approvers for the position.
- **Department Approval Status**: Indicates the approval status of the departmental approvers for the position.
- **Business Unit**: Indicates Vancouver/Okanagan campus.
- **Position Type**: Select appropriate values based on employment group and term of appointment.
- **Non UBC Posn?**: Select if position is not an official UBC position.
- **Pool Posn?**: Select if head count for position is greater than one.
- **Unpaid Posn?**: Select if position is unpaid (ie, honorary, clinical) or not paid through UBC’s payroll.
- **Joint Position?**: Select if position will be jointly managed and paid by two distinct faculties or departments.
- **Expansion Posn?**: Select if the position is being created as a result of an expansion.
- **F-Slot**: Enter former F-Slot Budget code for reference purposes (Faculty positions only).
• **Original Position Start Date**: Original start date of position (not employee), if known, otherwise the date position created in position management. Date must precede all employee hire dates into the position.

• **Max. FTE**: Enter the maximum, total number of full-time equivalents associated with this position.

• **Max. Head Count**: Enter the maximum, total number of employees associated with this position.

• **Anticipated Hire Date**: Anticipated start date of an incumbent.

• **Position End Date**: Enter end date for all term positions; if position is ongoing, leave blank.

• **Campus, VP/Faculty, Department, Location**: Enter the codes associated with the department.

• **Employment Group, Job Family, Job Code/Classification Title**: Enter the codes associated with the job.

• **Job Description Approval Required**: Indicates if position requires H.R., F.R. and/or Vice-Provost approval (M&P, SUD, Excluded M&P, UBC-O BCGEU and some Faculty positions).

• **Business Title**: Enter appropriate working title (max. 50 characters).

• **Does the position require UBC to do a Criminal Record Check?**: Select Yes or No (see ‘More on criminal record check’ hyperlink to determine if the position requires it).

• **Reports To**: Enter Position number of position the new Position number reports to.

• **Dotted-Line Reports To**: Enter Position number of position the new Position number has a dual reporting relationship to.

**Important**: Click on **Save for Later** at any time to save partially completed work.

**Note**: The VP/Faculty and Department fields will be restricted to the VP/Faculty/Department codes you have security access to.
2.2.3 Enter Job Description/Ad

- **Faculty Job Description/Ad**: Enter the Faculty Job Ad in this box.

```
Applications are invited for a 3-year limited-term position at the rank of Assistant Professor Without Review to commence July 1, 2013. The initial appointment will be for a 12-month period and may be renewed for up to two more years, subject to satisfactory performance appraisals, compliance with UBC agreements and policies, and availability of funds.

Candidates should have a specialization in the acquisition of Italian as a Second or Foreign Language and experience in using and developing language instruction technology on different platforms. The successful candidate for this position will teach Italian language and culture courses at all levels. He or she will be expected to maintain an active program of research and teaching, and to undertake student advising duties and other service assignments as appropriate in connection with the development of the Italian language program, and more generally within the Department.

A completed Ph.D. (or solid indication of imminent completion) in Italian or an equivalent doctoral degree is required. Candidates must have native or near-native fluency in Italian, appropriate expertise in L2 and L3, as well as an excellent command of English to teach Italian Studies courses. They will also demonstrate excellence or clear promise of excellence in research and teaching.
```

Important: Click on **Save for Later** at any time to save partially completed work.

Note: Click on **Print Job Description/Ad** to print a formatted and printer-friendly version of your job description after you have saved your work. Your pop-up blocker must allow pop-ups from ubc.ca for this functionality to work.
2.2.4 Review Approvals

Enter the contact information (Name, Position, Phone, and Email) for the person who would be best to answer any questions with respect to the job ad entered.

Approvals will be routed according to the rules defined in the workflow rules repository for your department. Depending on which Submit button is clicked, the appropriate type of approval steps will be taken.

- **Submit for Dep’t & Central Approval** – Both departmental and central approval steps.
- **Submit for Central or Optional Central Approval** – Only central approval steps.
- **Submit for Departmental or Optional Departmental Approval** – Only departmental steps

When the position is submitted for approval, approvers will be notified via email that an approval request exists. Once the position is fully approved or pushed back, the originator will likewise be notified via email as to the status of their position approval request.

**Important:** Click on **Save for Later** at any time to save partially completed work.
2.2 Enter Budget details

- A summary of the **Position Information** appears above the salary range information.
- **Salary Range**: Displays current salary range for the position. Change **Salary Range as of date** to display historical salary ranges.
- **Funding Type**: Select appropriate funding type (**Budget**, **Grant**, **Self**, or **Multiple Sources**). This is displayed on job postings when the position is used to create a job opening/posting. It has no impact on Hyperion.
- **Salary Commitments**: Select which source the Hyperion budget system should reference for budget information for this position. If **Hire Data** is selected, Hyperion will use employee salary information from HRMS to calculate a budget. If **Posn Data** is selected, the budget system will use the budget information recorded below, on this page.
- **Benefit Percent**: Value defaults automatically based on the employer-paid benefit costs for the employment group selected for the position. The defaulted value is based on a monthly, ongoing positions (all benefit plans). Adjust the percentage for hourly positions or positions which are not entitled to all benefits.
- **Funding Source**: Indicate if the funding for the position comes from existing or new funding.
- **Budget Comments**: Enter comments relating to the position budget (for your own use and/or any approvers that will look at this later).
**Note:** The budget system will use position budget information for all unfilled positions, so it’s important to keep the information for all your positions up to date. Inactivate or delete positions which are no longer used or were created in error.

---

### Funding Details (Account and Budget Details)

Multiple accounts and/or multiple funding periods for the position are recorded in this section. However, only the current fiscal budget period should be entered corresponding to the given Event Start Date. Click on the plus icons [+](https://example.com) where indicated in the screenshot on the preceding page to insert additional rows.

- **Begin Date:** This is the date the funding from the specified account(s) is in effect.
- **End Date:** This is the last date the funding from the specified account(s) is in effect. It is defaulted by the system as the day before the succeeding funding lines or to the position’s end date.
- **Core Funding:** Click this checkbox for any funding that is designated as Core funding. This will be picked up in Core funding reports in Hyperion for positions where the Salary Commitment field is set to Posn Data. For positions designated as Hire Data, you must designate Core funding in HRMS hire records by putting the word CORE in the Reference field on appointment forms or on-line screens (eRecruit and ePAF).
- **SpeedChart:** Enter the four-digit, alpha speedchart which will be used to charge all salary and benefit related expenses for this position.
- **Account:** Enter the six-digit, numeric account code which corresponds to the employment group (Faculty, Staff, Student) and if the position is monthly or hourly paid. Click on the magnifying glass [](https://example.com) icon for a list of valid values.
  
  **Note:** The speedchart and account combination must be an active account with a PG end date which does not precede the position begin or end dates.
- **Amount Type:** Select how the budget dollars in the amount fields are being expressed – Annually, Monthly, or Per Period.
- **Salary Amount:** Enter the total dollar amount, based on the Amount Type entered.
  
  **Note:** Annual amounts should be based on a twelve-month period, regardless of length of appointment.
- **Benefit Amount:** Displays the calculated total benefit costs, based on the Benefit Percent value.
  
  **Note:** Use this link [http://www2.finance.ubc.ca/payroll/calculators/benefitscostcalculator.cfm](http://www2.finance.ubc.ca/payroll/calculators/benefitscostcalculator.cfm) to assist you in calculating annual benefit costs.

---

**Important:** Click on ![Save for Later](https://example.com) at any time to save partially completed work.
2.2.6 Review Incumbents

- **Incumbents** page displays a list of current incumbents attached to the position. Data will only appear here for existing positions which have active incumbents.
- Change **As of Date** and refresh button to display incumbents attached to the position historically or in the future.
- **Current Head Count: # Out Of #** displays the total number of employees occupying the position out of the total number designated as the Max Head Count (see Position Information page).
- Click on **Job Data** link to drill into job data component for employee selected (available only if you have security access to job data records for the given position incumbent).

**Important:** Click on **Save for Later** at any time to save partially completed work.
2.2.7 Attach Documents

- Upload any documents you wish to support the position (ie, departmental organizational charts, funding authorizations, etc.).
- Click on the add attachment icon + Add Attachment to upload a document.
- Click on the delete attachment icon - Delete Attachment to delete a document.
- Use the Description text box to clearly describe the attachment.

**Important:** Click on Save for Later at any time to save partially completed work.
2.2.8 Enter Joint Position details (if applicable)

If the **Joint Position?** field was clicked on in the Position Information page (1st tab in component), you’ll need to complete the **Joint Position page**.

- Enter the **Campus**, **VP/Faculty**, **Department**, **Location Code**, **Home Department Indicator** and **FTE** fields for all departments jointly sharing the position, including the home department.
- Click on the magnifying glass icon for a list of valid values.
- Click on the plus icon to insert a row to add joint department information.

**Note:** In order for positions to be retrieved in position management by **both** the home and non-home departments, the non-home department information, must be entered in its entirety on this page.

**Important:** Click on **Save for Later** at any time to save partially completed work.
2.2.9 Submit Position for approvals

Click on the appropriate **Submit** button to submit your position for approval.

Approvals will be routed according to the rules defined in the workflow rules repository for your department. Depending on which **Submit** button is clicked, the appropriate type of approval steps will be taken.

- **Submit for Dep’t & Central Approval** – Both departmental and central approval steps.
- **Submit for Central or Optional Central Approval** – Only central approval steps.
- **Submit for Departmental or Optional Departmental Approval** – Only departmental steps.

You will be presented with a list of approvers which have been determined by the rules entered into the Workflow Rules Repository for your department.

If the list is correct, confirm this by selecting **Yes** and click on **Return**.

If the list is **not** correct, select **No** and click on **Return**. Contact your department workflow administrator to review and modify the rules that has been setup for your department. After the problem has been fixed, re-submit the position for approval and review the list again.
Once you have successfully submitted your position for approval, you will be presented with a confirmation panel. Click OK.

You will also be presented with a graphical flowchart of the steps in your approval workflow. Each step will indicate who the approver(s) are and what the current status is. If there are multiple approvers, clicking on Multiple Approvers will list all the approvers for that step (see below).
You may also insert additional approvers and reviewers between steps by clicking on A panel will appear to allow you to select the user as well as their role in the approval process (see below). Click on the magnifying glass in the UserID field to search for an approver by name.

If position is being submitted for approval, the Position Approval Status changes to Pending Approval. Approvers will be notified via email that an approval request exists. Once fully approved or pushed back, the originator will likewise be notified via email as to the status of their position approval request.
2.3 Position Approval Process

Faculty Relations (UBC-V) / Human Resources (UBC-O) and the respective Provost's office is responsible for approving all new Tenure and Tenured-Track Positions/Ads which fall under Faculty-FA (BOG). If the same approver occurs in different steps of the approval process, an approval action is still required for each step.

2.3.1 Email notification

Once the position is submitted for approval, Human Resources/Faculty Relations will receive an email notification advising them that a position requires approval. The approver is then directed to a PeopleSoft Worklist page via a link in the email:

Approval Request Email:

![Approval Request Email Image]

Approver's Worklist Page:

![Approver's Worklist Page Image]
2.3.2 Approval Status and History

The Approval Status/History page is where the approval is recorded and submitted.

Approver selects ‘Approve’ or ‘Pushback’.

If ‘Pushback’ is selected, Approver should provide reason and changes required in comments box.

If ‘Approve’ is selected, the Worklist item will disappear from the Approvers Worklist. The system will automatically send an email notification to the originator advising them of the approval status (and will appear on their Worklist) once the position has been fully approved or pushed back.
The Approvals page after clicking on Approve.
2.4 Edit Position Information


2.4.1 Find an existing position

- Click on the magnifying glass icon for a list of valid values.
- Enter fields in order that they appear.
2.4.2 Select the position to update

Click on the checkbox adjacent to the position selected. Click on **Update** to access position information.

**Important note:** Only positions which are in an **Approved** or **Draft Approval** status and are in a department you have security access to can be updated.

Positions which require approval (e.g. BOG), require that you insert a new effective-dated row. Existing data, with the exception of the **Event Start Date**, cannot be modified for these Positions.

For positions requiring approval, changes to the Employment Group, Job Family, Job Code, and/or any sections in the Position Information page will generate a new approval request.
2.4.3 Positions and effective dates

Click the plus icon to insert a new effective-dated row:

The importance of the Event Start Date field:

The Event Start Date or effective date of your position is very important. This date enables you to maintain a complete chronological history of all your position data, whether you changed them two years ago or want them to go into effect in two months. With this information, you can do statistical analysis at a particular point in time in the past, now or in the future.

The system also uses the Event Start Date field to compare pages and tables to system prompt tables that you see displayed throughout position management so that the data displayed is valid as of the effective date of the page on which you’re working.

The Event Start Date is particularly important when making changes to a position which affects the incumbents attached to it. Let’s take an example of a departmental reorganization. Several new departments are created and employees are being moved to them. You’ll want to update the department in position management to reflect this change and record when it went into effect using the Event Start Date. Then you’ll want to update the department (via Payroll eForms or appointment forms) for the employees attached to the position in their individual HRMS job records, using the same date. You’ll need to use the same date for both transactions in order to successfully record the department changes. If the position date has an Event Start Date which is greater than the employee’s department change in HRMS, the transaction required to update the incumbents’ job records will not be possible.
Correcting Event Start Date Entries:

The Event Start Date may be overwritten and corrected. If you get the error below when attempting to correct an Event Start Date, you must overwrite and correct the existing event start date(s) entries.

Do not select

When multiple Event Start Date entries require correction, ensure you correct them in correct chronological order, starting with the oldest date. Save your work after each Event Start Date correction.
2.4.4 Events and the Event Start Date

Enter Event and Event Start Date and make required changes to position:

Event:
- 2. Update Position
  When making changes to information which doesn’t involve a reclassification or position budget changes.
- 3. Reclassify Position
  To record job reclassifications. However, for retroactive reclassifications, it is advised to create a new position.
- 5. Update Position Budget
  To record position budget changes.

Event Start Date: When making changes on a pushed back transaction, ensure you use the same date you used on the submitted transaction.

Sequence: The sequence number is connected to the Event Start Date and defaults automatically. All unique event start dates are connected to sequence number zero. When multiple effective dates are entered with the same value, the sequence numbers will be assigned sequentially. The system considers the event start date/sequence combination which has the highest sequence number as the correct transaction.

To illustrate this concept, consider the following example:

<table>
<thead>
<tr>
<th>Event</th>
<th>Event Start Date</th>
<th>Sequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add New Position</td>
<td>July 1, 2010</td>
<td>0</td>
</tr>
<tr>
<td>Update Position</td>
<td>July 1, 2010</td>
<td>1</td>
</tr>
</tbody>
</table>

In addition, when hiring an incumbent into a position, the incumbent’s hire date cannot precede the initial Event Start Date of the position. Using the example above, you could not hire someone into this position with these dates prior to July 1, 2010.

Make any changes required to the position information. Note that certain changes made to the position information, may require re-approval. For example, changing the position classification information and/or job description may require re-approval if the job classification type warrants ((ie, M&P positions).

Click on the appropriate Submit button to submit your position for approval.
2.5 Copy a Position


2.5.1  Find an existing position

- Click on the magnifying glass icon for a list of valid values.
- Enter fields in order that they appear.
2.5.2 Select the position to copy

Click on the checkbox adjacent to the position selected. Click on **Update** to access position information.

---

Important note: You will be permitted to copy only those Positions with the following Approval Statuses:

- Approved, OK to Post
- Approved
- Self-Approved, OK to Post
- N/A

---

**Notice** (25002.27)

This Position is pending approval and cannot be modified or copied at this time.
2.5.3 Enter Position Information

Note that fields may need to be entered or altered. For tenured Faculty positions, changes to most fields in the entire Position component will result in an approval workflow being launched. All tenured Faculty Positions require approval, regardless if an approved Position was copied or not.

See: Section 0 Enter Position Information above on page 13 for more information.
2.5.4 Review or modify Job Description/Ad

See: Section 2.2.3 Enter Job Description/Ad above on page 16 for more information.
See: Section 2.2.4 Review Approvals above on page 17 for more information.
2.5.6 Enter Budget details

See: Section 2.2.5 Enter Budget details above on page 18 for more information.
2.5.7 Review Incumbents

See: Section 2.2.6 Review Incumbents above on page 20 for more information.

2.5.8 Attach Documents

See: Section 2.2.6 Review Incumbents above on page 20 for more information.
2.5.9 Enter Joint Position details (if applicable)

See: Section 2.2.7 Attach Documents above on page 21 for more information.

2.5.10 Submit Position for approvals

Click on the appropriate Submit button to submit your position for approval.

Approvals will be routed according to the rules defined in the workflow rules repository for your department. Depending on which Submit button is clicked, the appropriate type of approval steps will be taken.

See: Section 2.2.9 Submit Position for approvals above on page 23 for more information.
2.6 Delete a Position

Navigation: Position Management>Delete Positions

2.6.1 Create a Run Control ID

Click on the **Add a New Value** tab. In the **Run Control ID** field, enter any value you wish (in this example we entered `DELETE_POSITION`). Note that all Run Control ID’s you create must be in one string (multiple words must be stringed together with an underscore).

Click on **Add** button.

This will permanently create this **Run Control ID** which will be tied to your PeopleSoft UserID. This step only needs to be done once.
2.6.2 Use an existing Run Control ID

Click on Find an Existing Value tab. In the Run Control ID field, enter the value you created earlier or leave the Run Control ID blank and click on the Search button to get a list of your Run Control IDs.
2.6.3 Select a Position to delete

Enter Position Number(s) you wish to delete and then click on the Run button.

The following positions may be deleted from the database:

- Positions which have **not** been used to create a Job Opening in eRecruit and/or
- Positions which are **not** attached to an active employee’s job record and/or
- Positions which have the following approval statuses: Approved, OK to Post, Approved, Approver, Self-Approved, Not Applicable.

You will receive an error message when you attempt to delete a position which does not meet the above criteria.
2.6.4 Run the delete process

In the **Server Name** field, click on the down arrow and select **PSUNX**. Click on the **OK** button.

A **Process Instance** number should now appear, indicating that you’ve successfully launched the deletion process.

The process takes approximately one minute for each position deletion.
2.6.5 Confirm the delete process

To verify if the position has been deleted, navigate to Position Management> Add/Update Position Info. and enter the Position Number you had requested be deleted. The system should return a message stating the Position Number is invalid or ‘no matching values were found’.
3

Job Openings/Postings
3.1 Create a Job Opening

Navigation: Recruitment>New Job Openings/Postings>Create New Job Opening/Posting

3.1.1 Search for a position

Enter the Position Number you wish to use to create your Job Opening/Posting or if you don’t know the code, click on the magnifying glass for a list of valid values or search for it using the various search fields (Campus, VP/Faculty, Department, etc.).

Click on Continue

Create New Job Opening/Posting Page

Complete all or some of the fields below and click on the ‘Continue’ button. Click on the magnifying glass to select from a list of valid values.

**UBC Position #:**

OR

**Enter information in the following fields to locate the Position Number**

- **Campus:**
  - VCVR: Vancouver
- **VP/Faculty:**
  - APSF: Faculty of Applied Science
- **Department Code:**
  - MECH: Mechanical Engineering
- **Employment Group:**
  - BOG: Faculty (Fac Assn)
- **Job Family:**
  - RG: Regular (RG)
- **Job Code:**
  - BURG01: Professor (tenure)
- **Job Title Key Word Search:**

Click on Continue or Clear

Only those positions which match the criteria below will be available for selection:

- Overall position status is *OK for eRecruit and ePAF*;
- *Will you be posting this position?* checkbox in Position Management is checked on.
Select the position you wish to create a job opening for.

Click on

Click on

Position Search Results

The following Positions exist which match your criteria. To use one of these Positions, click the Check box and click on the 'Continue' button.

<table>
<thead>
<tr>
<th>Position #</th>
<th>Employment Group</th>
<th>Job Family</th>
<th>Job Code</th>
<th>Classification Title</th>
<th>Business Title</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>00032098</td>
<td>BOG</td>
<td>RG</td>
<td>BURG01</td>
<td>Professor (tenure)</td>
<td>Professor (tenure)</td>
<td>MECH</td>
</tr>
<tr>
<td>00032103</td>
<td>BOG</td>
<td>RG</td>
<td>BURG01</td>
<td>Professor (tenure)</td>
<td>Professor (tenure)</td>
<td>MECH</td>
</tr>
</tbody>
</table>
3.1.2 Enter information as required

Complete fields indicated below as required.

**Job Opening**

- **Posting Title:** Professor (tenure)
- **Job Opening Status:** Draft
- **Classification Title:** Professor (tenure)
- **Business Unit:** UBC01 UBC - Vancouver
- **Employment Group:** Faculty (Fac Assn)
- **Department:** MECH Mechanical Engineering
- **Job Code:** BURG01
- **Closing Date:**
- **FTE:** 0.000000
- **Position #:** 00032098

**Created By:**
- **Date Opened:** 02/05/2013
- **Available Openings:** 1
- **Reference Names/Contact information required from applicants?**
- **Position #:** 00032098
- **Business Unit:** UBC01 UBC - Vancouver
- **Job Code:** BURG01 Professor (tenure)
- **Company:** 01 University of British Columbia
- **Department:** MECH Mechanical Engineering
- **Location:** CIC CICS/Comp Sci Bldg
- **Recruiting Location:**
- **Status Code:** Draft
- **Status Reason:**
- **Status Date:** 02/05/2013
- **Desired Start Date:**
- **Job End Date:**
- **Ongoing?**
- **Date Authorized:**

**Employees Being Replaced**

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Additional Job Specifications**

- **Employee Type:** Salaried
- **FTE:**
3.1 Create a Job Opening

- **Available Openings:** Enter the number of positions available to be filled.
- **Reference Names/Contact Info…:** Clicking this option will force applicants applying for this job opening to supply reference contact information. The default is to not force applicants to provide this information.
- **Recruiting Location:** Indicates where the job opening is located (Point Grey Campus, Hospital Site, Agassiz, Robson Square, Kelowna).
- **Desired Start Date:** The approximate start date of the job once filled. This date can be changed at the job offer recruiting stage.
- **Job End Date:** For term positions, the last anticipated date of work.
- **Ongoing?:** For non-term positions, indicate that the job is ongoing.
- **Employees Being Replaced – Name:** Enter the name(s) of the former incumbents of the job opening. For informational purposes only.
- **FTE:** Indicate Full-Time Equivalent percentage. 1.000000 = 100% time; 0.500000 = 50% time. Defaults to 1.000000 is ‘Full-Time’ is selected.
- **Full/Part Time:** Defaults to Full-Time if FTE = 1.000000 or to Part-Time if FTE is less than 1.000000
• **Interviewers:** Enter the selection committee/interview team here. People identified as interview team members can access applications via self-service. Only active UBC employees can be added as interview team members.

• **On Call:** Use for select unionized positions only. This field does not appear for Faculty job openings.

• **Under Review:** Clicking on this checkbox will remove hiring salary information from the posting and replace it with the wording ‘Under Review’.

• **Create New Job Posting/Repost:** Click on this hyperlink to create new job postings or repost a posting which was closed within the last 90 days (postings closed more than 90 days ago require a new Job Opening).

• **Comments:** Add your comments in respect to this job opening (for yourself or for your approvers).

Click on **Save as Draft** at any time to save partially completed Job Openings.
3.1 Create a Job Opening

3.1.3 Create new job posting or repost

Click on the ‘Create New Job Posting/Repost’ link in the Job Opening page. The ‘Posting Information’ page will open.

This page has four sections:

- Optional Introductory Wording
- Job Description/Job Ad
- Additional Closing Wording
- Job Posting Destination
Optional Introductory Wording

This section is completely optional.

Any text can be added which will appear as the first paragraph in your job posting.

Important: Spell check any text you enter using the icon.

Job Description

- The Job Description section is mandatory and defaults the Faculty Job Ad from the Position Management entry specified when creating the job opening.
- Text in this section is display only and cannot be modified on this page.
- Modifications must be made in the Position Management and may require you to create a new Job Opening.

Important: Spell check any text you enter using the icon.
The Equity/Immigration Statement is mandatory and automatically appears on all Faculty and Staff postings. This text is non-updateable. Changes to the equity statement must be requested through Faculty Relations or Human Resources Advisory Services.

Additional wording with pre-written text is currently available for:

- Faculty salary commensurate with qualifications & experience
- Faculty attachment instructions
- Faculty GPOF Funding provision
- Hyperlink to Department website
- Internal Rider

**Important:** Spell check any text you enter using the 🗝️ icon.
**Job Posting Destinations**

- **Destination**: ‘UBC Careers Website’ defaults for all postings and is mandatory. To add more posting destinations, click on the ‘Add Posting Destinations’ hyperlink. Additional destination values are: AUCC University Affairs, CAUT Bulletin, Executive Search, Globe & Mail, Other, UBC Careers Website, Vancouver Province, Vancouver Sun. Note that UBC eRecruit is not integrated with these additional posting destinations. Their use is for informational purposes only.

- To record the name of a publication not included in the drop-down list, select ‘Other’. A text box will then display where you can enter the specific name of the publication.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Posting Type</th>
<th>Post Date</th>
<th>Remove Date</th>
<th>Posting Duration (Calendar days)</th>
<th>Posting Duration (Working days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UBC Careers Website</td>
<td>Int/Ext</td>
<td>02/06/2013</td>
<td>03/09/2013</td>
<td>30</td>
<td>22</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Posting Type**: Defines posting audience – Internal/External Applicants. All UBC postings are open to internal and external applicants.

- **Post Date**: First day posting will appear in UBC Careers website. Defaults to the next calendar day, to ensure postings are available to applicants for the full number of days in the posting period, but may be changed to a future date. Post dates will be automatically adjusted if Job Opening/Posting approval is received after the original post date. For example, you create a job opening March 1, post date is March 2 and you receive approval on March 3. The post date will be adjusted to March 4, the day following the approval.

- **Remove Date**: First day posting will not appear in UBC Careers website (ie, removed at 0:00 on ‘Remove Date’). Defaults to the posting close date based on the posting duration prescribed by the given employment group (note that some employment groups do not have prescribed posting periods).

- **Posting Duration**: System calculates the posting duration in calendar days as well as business days, excluding public holidays.

- **Upload Publication Ad**: Upload a scanned version of your publication ad. Click on the garbage can to delete it.

- Posting dates are based on a 24-hour clock.
- Posting first appears on UBC Careers at 0:00 on the ‘Post Date’ specified.
- Postings are removed from UBC Careers at 0:00 on ‘Remove Date’ specified -- postings will not appear on the ‘Remove Date’.
Job Posting

Job ID: 99999999999999
Location:
Employment Group: Faculty (Fac Assn)
Job Category: Regular
Classification Title: Professor (tenure)
Business Title: Professor (tenure)
Department: Mechanical Engineering
Desired Start Date: 07/01/2013
Funding Type: Budget Funded
Closing Date: 03/08/2013
Available Openings: 1

Test

Salary will be commensurate with qualifications and experience.

UBC hires on the basis of merit and is committed to employment equity. All qualified persons are encouraged to apply. We especially welcome applications from members of visible minority groups, women, Aboriginal persons, persons with disabilities, persons of minority sexual orientations and gender identities, and others with the skills and knowledge to engage productively with diverse communities. Canadians and permanent residents of Canada will be given priority.
3.1.5  Submit Job Opening for Approval

Before you can Save & Submit a Job Opening for approval, you need to first confirm the approvers.

[+  Add Interviewers]

---

### Job Postings and Posting Periods

<table>
<thead>
<tr>
<th>Postings</th>
<th>Post Date</th>
<th>Remove Date (at 0:00)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professor (tenure)</td>
<td>02/06/2013</td>
<td>03/09/2013</td>
</tr>
</tbody>
</table>

[+  Create New Job Posting/Repost]

---

### Review and Confirm Approvers

**Originator Comments (for your approvers or general comments):**

Click on [Review and Confirm Approvers]

---

### Approval Steps

<table>
<thead>
<tr>
<th>Approval Step</th>
<th>Approval Rank</th>
<th>Approval Category</th>
<th>User ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DeptAdm</td>
<td>Primary</td>
<td>TSUKDA</td>
<td>Ada Toy</td>
</tr>
<tr>
<td>1</td>
<td>DeptAdm</td>
<td>Secondary</td>
<td>JANRICO</td>
<td>Janice Marston</td>
</tr>
<tr>
<td>1</td>
<td>DeptAdm</td>
<td>Secondary</td>
<td>JENROSS</td>
<td>Jennifer Perl</td>
</tr>
<tr>
<td>1</td>
<td>DeptAdm</td>
<td>Secondary</td>
<td>LESLIEF</td>
<td>Leslie Fernandez</td>
</tr>
<tr>
<td>1</td>
<td>DeptAdm</td>
<td>Secondary</td>
<td>BALEYER</td>
<td>Bailey Grove</td>
</tr>
<tr>
<td>2</td>
<td>FacAdm</td>
<td>Primary</td>
<td>SREEE</td>
<td>Sue Yes</td>
</tr>
<tr>
<td>2</td>
<td>FacAdm</td>
<td>Secondary</td>
<td>SELLEN</td>
<td>Ellen Liu</td>
</tr>
<tr>
<td>3</td>
<td>FacAdm</td>
<td>Secondary</td>
<td>IGAS</td>
<td>Nadine Jankowski</td>
</tr>
<tr>
<td>3</td>
<td>FacAdm</td>
<td>Primary</td>
<td>ANNENACIL</td>
<td>Anne MacLean</td>
</tr>
</tbody>
</table>

**Are these Approvers/Steps correct?**

- [ ] Yes
- [ ] No

If Yes button is not available for selection, the system detected a problem with your departmental approvals.

Click [here] to review departmental approval steps for this transaction.

Click [here] for help with approver errors appearing on this page.

---

[Return]
## Job Opening

<table>
<thead>
<tr>
<th>Posting Title</th>
<th>Professor (tenure)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Opening Status</td>
<td>Draft</td>
</tr>
<tr>
<td>Classification Title</td>
<td>Professor (tenure)</td>
</tr>
</tbody>
</table>
| Business Unit | UBC01  
UBC - Vancouver |
| Employment Group | Faculty (Fac Assn) |
| Department | MECH  
Mechanical Engineering |
| Job Code | BURG01 |
| Closing Date | |
| FTE | 0.000000 |
| Position # | 00032098 |

---

Click on **Save & Submit** to save Job Opening/Posting and submit for approval.
Approval page appears with name of the person the Job Opening was routed to for approval.

Location: UBC

Recruiting Location: Vancouver - Point Grey Campus

Status Code: Pending Approval

Desired Start Date: 07/01/2013

Job End Date: Ongoing

Date Authorized:

Employees Being Replaced

Additional Job Specifications

Employee Type: Salaried

Funding Type: Budget-Funded

FTE: 1.000000

Full/Part Time: Full-Time

Interviewers (must be a UBC employee)

Job Postings and Posting Periods

Postings

Post Date

Remove Date (at 00:00)

Professor (tenure)

02/06/2013

03/09/2013

Job Approvals

Job Opening

***Enter any comments PRIOR to selecting the approval buttons above***

Note: All job openings/postings require approval.
3.2 Job Opening/Posting Approval Process

3.2.1 Approver is notified and accesses worklist

Approver is notified and accesses approval request either through the email notification or the PeopleSoft Worklist page.

Sample approval request email sent automatically to approver:

Approval is Requested for Job Opening (14095) Professor (tenure)

kathy@hr.ubc.ca

Sent: Tue 2005/03 4:33 PM
To: kan.michael

A job opening has been created or updated in the Human Resources Management System (HRMS). Your approval is required.

Job Opening ID: 14095
Posting Title: Professor (tenure)

To view this job opening, click on the link below. This link will bring you to your HRMS 'Worklist' page. The transaction will be listed under the 'Work Item' column as an 'Approval Routing'.

https://www.auth.cwl.ubc.ca/auth/login?serviceName=hr_portal_psa&serviceParams=context%3D0%26target%3Dworklist

If you require assistance with approving this position, please go to:


Thank you.

Approver’s Worklist:

<table>
<thead>
<tr>
<th>Worklist for TSUADA - 422 - kan.michael</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Detail View</strong></td>
</tr>
<tr>
<td>--------------</td>
</tr>
<tr>
<td><strong>From</strong></td>
</tr>
<tr>
<td>System Administrator</td>
</tr>
<tr>
<td>System Administrator</td>
</tr>
<tr>
<td>kan.michael</td>
</tr>
</tbody>
</table>
3.2.2 Approver enters approval or pushback

Reason for pushback must be provided in the comments section and must be entered prior to clicking on the pushback button. Comments should include instructions to the originator as to what needs to be modified in the Job Opening/Posting in order to obtain approval.
3.2.3  Job Opening is approved

Click on Approve and the workflow reflects the current status.

In the case of full approval, originator is informed of Approver's decision via email and Worklist entry is created.

Job Opening ID (14096) Professor (tenure) has been Approved

The following Job Opening has been approved.

Job Opening ID: 14096
Posting Title: Professor (tenure)
Posting Date: 06-Feb-2013

This posting will appear on the careers website on the posting date shown above. The original posting date may have been auto-adjusted by the system based on when the approval was submitted.

To point applicants directly to this job posting in newspaper ads, periodicals, etc., use the following hyperlinks:

Staff job postings: www.staffcareers.ubc.ca/xxxx (xxxx=Job Opening ID) Faculty job postings: www.facultycareers.ubc.ca/xxxx (xxxx=Job Opening ID)

Note that these direct links to the job posting will only function when the job posting is open.

To review this Job Opening, use this link:

https://www.auth.cwlv.ubc.ca/auth/login?serviceName=hr_portal_psa&serviceParams=contect%3D0%26target%3Dworklist

Worklist Item for Approval:
Originator can access the Job Opening to review approval and any comments from approver.

Once approval on Job Opening is received, the job posting will become available to applicants the following day or on the ‘Post Date’ if in the future. In all cases, postings will not become available to applicants until approval has been received.
3.2.4 Job Opening is pushed back

Click on PushBack and the workflow reflects the current status.

In the case of a pushback, originator is informed of Approver’s decision via email and Worklist entry is created.

Sample email of a pushback notification:

```
Job Opening ID (14097) Professor (tenure) has been pushed back

michael.camp@ubc.ca

Sent: Tue 2/5/13 5:14 PM
To: Cam, Michael

The following job opening has been pushed back.

Job Opening ID: 14097
Posting Title: Professor (tenure)

To review and resubmit this job opening, visit:

https://www.auth.ubc.ca/auth/login?serviceName=hr_portal_paa&serviceParams=context%3DOA%26target%3Dworklist
```

Worklist Item for pushback:

```
Worklist for DEPTRECRUTER1: Hansen, Kathy

<table>
<thead>
<tr>
<th>From</th>
<th>Date From</th>
<th>Work Item</th>
<th>Worked By Activity</th>
<th>Priority</th>
<th>Approver Category</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>422 - Taho</td>
<td>02/05/2013</td>
<td>Transaction Pushed Back</td>
<td>Approval Workflow</td>
<td>-</td>
<td>-</td>
<td>Job Opening ID: 14097 Decil ID:NEO4 Urban OCE90 G</td>
</tr>
</tbody>
</table>
```

Originator accesses the Job Opening to review comments from Approver and reason for pushback.

Originator makes recommended changes to Job Opening/Posting and clicks on the Resubmit button and approval process repeats itself until an approval is received.
3.3 Repost a Job Posting

Job postings can be reposted within 90 days without re-approval. Reposts after the 90-day period, require you to create a new job opening and go through the approval process.

To repost of job, navigate to: Manage Applicants and Openings. Open your Job Opening and click on the Job Opening Details link.

Go to the bottom of the page to the ‘Job Postings and Posting Periods’ section. Click on Create New Job Posting/Repost to insert a new posting.

Find Job Openings

<table>
<thead>
<tr>
<th>Search Results</th>
<th>ID #</th>
<th>Department</th>
<th>Created</th>
<th>Closed/Filled</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Junior Software Engineer</td>
<td>12693</td>
<td>Mechanical Engineering</td>
<td>04/08/2012</td>
<td>05/07/2012</td>
<td>Filled</td>
</tr>
<tr>
<td>Program Assistant 2 (Gr6)</td>
<td>12527</td>
<td>Mechanical Engineering</td>
<td>03/14/2012</td>
<td>04/19/2012</td>
<td>Filled</td>
</tr>
<tr>
<td>AsstProfessor (tenure-track)</td>
<td>11742</td>
<td>Mechanical Engineering</td>
<td>11/15/2011</td>
<td>02/01/2012</td>
<td>Open</td>
</tr>
<tr>
<td>Program Assistant 2 (Gr5)</td>
<td>11741</td>
<td>Mechanical Engineering</td>
<td>11/14/2011</td>
<td>01/04/2012</td>
<td>Filled</td>
</tr>
<tr>
<td>AsstProfessor (tenure-track)</td>
<td>11739</td>
<td>Mechanical Engineering</td>
<td>11/14/2011</td>
<td>01/31/2013</td>
<td>Filled</td>
</tr>
<tr>
<td>Engineering Technician 1</td>
<td>11193</td>
<td>Mechanical Engineering</td>
<td>09/01/2011</td>
<td>09/15/2011</td>
<td>Filled</td>
</tr>
<tr>
<td>Engineering Technician 1</td>
<td>10922</td>
<td>Mechanical Engineering</td>
<td>09/06/2011</td>
<td></td>
<td>Cancelled</td>
</tr>
<tr>
<td>Engineering Technician 1</td>
<td>10921</td>
<td>Mechanical Engineering</td>
<td>07/29/2011</td>
<td></td>
<td>Draft</td>
</tr>
</tbody>
</table>

* Click on Job Opening title to access Job Opening details

CANCEL
Job Opening

Job ID: 11742
Location: Vancouver - Point Grey Campus
Employment Group: Faculty (Fac Assn)
Business title: Asst Professor (tenure-track)
Department: Mechanical Engineering
Full/Part Time: Full-Time
FTE: 1.000000
Desired Start Date: 07/01/2012
Job End Date: 
Funding Type: Budget Funded
Other: 
Closing Date: 01/31/2012
Available Openings: 1

Manage Applicants

Manage Applicants

Display: All

Applicants

<table>
<thead>
<tr>
<th>CDN Citizen</th>
<th>Applicant Name</th>
<th>ID</th>
<th>Current Relationship with UBC</th>
<th>Disposition</th>
<th>Resume/CV</th>
<th>Last Updated</th>
<th>*Take Action</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Adilfahame Anum III</td>
<td>102502</td>
<td>External Applicant</td>
<td>Decline</td>
<td></td>
<td>02/29/2012 11:15AM</td>
<td>*Select Action...</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>Albert Roche</td>
<td>105669</td>
<td>External Applicant</td>
<td>Decline</td>
<td></td>
<td>02/23/2012 3:05PM</td>
<td>*Select Action...</td>
<td></td>
</tr>
</tbody>
</table>

Additional Job Specifications

Employee Type: Salaried
Funding Type: Budget Funded
FTE: 1.000000
Full/Part Time: Full-Time

Interviewers (must be a UBC employee)

Interviewer ID

Name

Add Interviewers

Job Postings and Posting Periods

Postings | Post Date | Remove Date (at 0:00)
----------|-----------|---------------------
Asst Professor (tenure-track) | 11/16/2011 | 02/01/2012

Create New Job Posting/Repost

Review and Confirm Approvers
In the Job Opening-Posting Information page, go to the bottom of the page to the ‘Job Posting Destinations’ section. Review the posting dates to determine when your posting will be reposted and click on the OK button.

Note that viewing the job posting at this point using the View Job Posting button, will not show that the posting is a ‘Repost’. You must save your data before the posting preview is updated.

Your additional posting should now indicate (Repost) in the ‘Job Postings and Posting Periods’ section. Click on the Save button to save your work. Your repost will appear the following working day in myCareers.
3.4 Cancel a Job Posting

To remove or cancel a job posting, change the ‘Remove Date’ of the posting to the same date as the ‘Post Date’. This will remove the posting from the Careers site immediately.

Note: If applicants have already applied for a posting which you are now cancelling, you should inform them of such (see Page 93 – Email Applicants).
4

Applying for Jobs
4.1 Apply for a Job Opening

Internal applicants and former employees can view job postings and apply for jobs via UBC’s Faculty and Staff Self Service application at www.msp.ubc.ca. Applicants must have a valid CWL account. Former employees must have had a CWL account prior to leaving the university, otherwise they must use the External applicant method described later in this chapter.

4.1.1 Internal applicants

Go to the myCareer portal pagelet.
External Applicants log in to system via the Human Resources website at: [www.hr.ubc.ca/careers](http://www.hr.ubc.ca/careers). They can view and search for job postings but must register themselves in order to apply for jobs. Job postings will appear in the lower portion of the page.

**Careers**

Enter your user name (email address) and password to login. If you have not yet registered, click on the ‘Register Now’ hyperlink below.

If an applicant has registered previously, then they can login with the email and password they registered with. Otherwise, they will need to register by clicking on ‘Register Now’. The following page will appear for them to enter their registration information.

**Register**

Enter your e-mail address below and create a password.

Please note that some email providers may place email in your junk mail folder. If you do not receive a confirmation email from us after submitting your application, please check your junk mail folder and if there, adjust your junk mail settings to ensure further emails are received correctly.
4.1.3 View and select the job posting

After the applicant has registered or logged in, they will be presented with their careers home page.

Full job descriptions and more details about the job can be viewed by clicking on the job title hyperlink.

They can also select the job(s) they would like to apply for and click the "Apply Now" button to continue.
### Job Posting

<table>
<thead>
<tr>
<th><strong>Job ID:</strong></th>
<th>14082</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location:</strong></td>
<td>Vancouver - Point Grey Campus</td>
</tr>
<tr>
<td><strong>Employment Group:</strong></td>
<td>Faculty (Fac Assn)</td>
</tr>
<tr>
<td><strong>Job Category:</strong></td>
<td>Regular</td>
</tr>
<tr>
<td><strong>Classification Title:</strong></td>
<td>Assoc Professor (tenure)</td>
</tr>
<tr>
<td><strong>Business Title:</strong></td>
<td>Assoc Professor (tenure)</td>
</tr>
<tr>
<td><strong>Department:</strong></td>
<td>UBCO-BarberArts&amp;SciencesUnit 3</td>
</tr>
<tr>
<td><strong>Full/Part Time:</strong></td>
<td>Full-Time</td>
</tr>
<tr>
<td><strong>Desired Start Date:</strong></td>
<td>12/01/2012</td>
</tr>
<tr>
<td><strong>Funding Type:</strong></td>
<td>Budget Funded</td>
</tr>
<tr>
<td><strong>Closing Date:</strong></td>
<td>07/29/2013</td>
</tr>
<tr>
<td><strong>Available Openings:</strong></td>
<td>1</td>
</tr>
</tbody>
</table>

UBC hires on the basis of merit and is committed to employment equity. All qualified persons are encouraged to apply. We especially welcome applications from members of visible minority groups, women, Aboriginal persons, persons with disabilities, persons of minority sexual orientations and gender identities, and others with the skills and knowledge to engage productively with diverse communities. Canadians and permanent residents of Canada will be given priority.

After reviewing the posting, they can save the job, apply for the job, or Return to Previous Page. Saving the job will take you to the list of currently saved jobs.
4.1.4 Complete your profile (for new registrations)
If the applicant newly registered on the site, they may be asked to complete their profile before applying.

My Profile
You can update your name, address, phone number and email here. Changes made to your contact details on this page will be updated on all of the jobs you have applied to.

<table>
<thead>
<tr>
<th>Member Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name:</td>
</tr>
<tr>
<td>Password:</td>
</tr>
<tr>
<td>Preferred Method of contact:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Legal Name (as it appears on your Social Insurance Card or other Government Identity Card)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Prefix:</td>
</tr>
<tr>
<td>*First Name:</td>
</tr>
<tr>
<td>Middle Name:</td>
</tr>
<tr>
<td>*Last Name:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country: Canada</td>
</tr>
<tr>
<td>Address 1:</td>
</tr>
<tr>
<td>Address 2:</td>
</tr>
<tr>
<td>Address 3:</td>
</tr>
<tr>
<td>Address 4:</td>
</tr>
<tr>
<td>City:</td>
</tr>
<tr>
<td>Province:</td>
</tr>
<tr>
<td>Postal:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Email Type: Primary</td>
</tr>
<tr>
<td>Email Address: <a href="mailto:michael.cam@ubc.ca">michael.cam@ubc.ca</a></td>
</tr>
<tr>
<td>Remove</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Phone Type:</td>
</tr>
<tr>
<td>Phone Number:</td>
</tr>
<tr>
<td>Extension:</td>
</tr>
<tr>
<td>Remove</td>
</tr>
</tbody>
</table>

Add Another Phone Number

Save  Return to Previous Page
4.1.5 Upload your resume or CV

The first step of the application process asks how you’d like to proceed with your resume/CV submission.

**Apply Now**

**Choose Resume / CV**

The personal information you provide through the UBC online recruiting software is collected pursuant to Section 26 of the Freedom of Information and Protection of Privacy Act, RSBC 1996, c.165 ("FIPPA"). The required personal information is collected for the purposes of supporting and evaluating your application for employment with UBC and for aggregate statistical purposes. The personal information will be used, retained and only disclosed by UBC in accordance with FIPPA.

If you have any questions about the collection of information, please contact Human Resources by Email or by phone at 604/822-8111.

**IMPORTANT INSTRUCTIONS ON USING THIS SITE:**

- Avoid using the browser’s back button as it may have unpredictable results.
- To cancel an application mid-way, please use the ‘Return to Previous Page’ or ‘Close Application’ buttons.
- Use ‘Save for Later’ if you want to complete an application at a later time.

Please follow all instructions to ensure the success of your application. Your success is our priority.

**STEPS:**

1. Upload cover letter, Resume, CV and any other supporting application documents. Once submitted, the system will merge each of your uploaded documents into one single PDF file.
   - **Note:** to ensure formatting from your original documents is retained, ensure your document(s) are submitted in portrait mode, avoid margins which exceed one inch and avoid manual formatting.
2. Provide work experience and education (if not in your Resume/CV).
3. Provide information on whether you have previously worked at UBC and your immigration status.
4. Submit your application.

Once you’ve submitted your application, you will not be able to alter your application.

<table>
<thead>
<tr>
<th>Upload your Resume/CV Package</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Upload a new resume/CV</td>
</tr>
</tbody>
</table>

Continue [Return to Previous Page]
Clicking on ‘Upload a new resume/CV’ brings you to the following page:

**Upload Resume/CV & Supporting Documents**

Upload your application documents by clicking on the ’Add Attachment’ link below.

Multiple documents (Resume, CV, cover letter, other supporting application documents) may be uploaded.

Each attachment you upload must not exceed 12 megabytes in size and the file name must not exceed 64 characters in length.

By clicking on ‘Continue’, the system will merge and convert your documents into one single PDF document. Documents will be merged in the order listed.

<table>
<thead>
<tr>
<th>Resume/CV &amp; Supporting Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>No attachment has been uploaded to this applicant's profile</td>
</tr>
</tbody>
</table>

Accepted file types: .doc, .docx, .pdf

[Add Attachment]

[Return to Previous Page]  [Continue to Next Step]

Upload all documents attachments which make up your complete resume package (Resume/CV, cover letter, etc.). Continue to click on **Add Attachment** until all your individual documents are uploaded. The system will prompt you to find and upload your documents after you click on **Add Attachment**.

[Upload]  [Cancel]  [Browse...]

Click on **Browse...** button to select and upload your file.
Once you have selected a file to upload, the page will be updated with the current set of uploaded documents. You may continue to add additional documents by clicking on ‘Add Another Attachment’.

**Upload Resume/CV & Supporting Documents**

Upload your application documents by clicking on the ‘Add Attachment’ link below.

Multiple documents (Resume, CV, cover letter, other supporting application documents) may be uploaded.

Each attachment you upload must not exceed 12 megabytes in size and the file name must not exceed 64 characters in length.

By clicking on ‘Continue’, the system will merge and convert your documents into one single PDF document. Documents will be merged in the order listed.

---

All documents uploaded will be merged into one single PDF document. Ensure that the documents you’ve uploaded appear in the order you’d like them to appear in the final merged document (i.e., cover letter first, then resume/CV).

Click on **Continue to Next Step** once all your documents have been uploaded. The following page will appear. Click on OK to continue or Return to Previous Page.

---

Your uploaded attachments will now be merged into one PDF document.

Please ensure your documents have been uploaded in the order you wish them to appear in the merged document.

Once the merge process has completed, please open and check your merged resume package to ensure your document(s) appears as you expect. In some cases, some formatting may be lost or page breaks may appear incorrectly. Refer to Step 1 of instructions page for known issues which may cause your document to appear differently than your original document(s). If there was a problem with your merged resume package, do not submit your application, modify your original documents as required and start over.

Do you wish to continue?
The next step is to complete the remainder of their application. The top part of the application page shows the job they are applying for, as well as any attachments that were uploaded for this application. It is important for applicants to open their merged resume/CV document to ensure their documents were merged as they expected. Click on the icon on the Complete Application page to open the merged resume/CV.

**Apply Now**

**Complete Application**

You are applying for:

- Assoc Professor (tenure)  

Remove

Add Another Job to Application

---

[Image: 135684_2013_02_06_10_26.pdf]

Remove and Replace Resume/CV

Michael Cunn

Edit Profile

---

Complete Application

---

**Work Experience**

You have not added any employment information to your new application.

[Add Work Experience]

---

**Education History**

**Highest Education Level:** A-Not Indicated

To add a degree, click the Add Post-Secondary Education History hyperlink below Post-Secondary. To change
4.1.6 Enter your work experience

Complete the on-line application – Work Experience section.
Click on Add Work Experience to add employment history details.

<table>
<thead>
<tr>
<th>Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have not added any employment information to your new application.</td>
</tr>
</tbody>
</table>

[Add Work Experience]

4.1.7 Enter your education history

Complete the on-line application – Education History section. This section is mandatory for all Faculty job openings.
Select ‘Highest Education Level’ from list of values and enter education history by clicking on education hyperlinks.

<table>
<thead>
<tr>
<th>Education History</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Highest Education Level:</strong></td>
</tr>
<tr>
<td>To add a degree, click the Add Post-Secondary Education History hyperlink below Post-Secondary. To change information for a degree, click the hyperlink under Degree field. Click on delete icon to remove corresponding degree.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Post-Secondary Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have not added any education information to your application.</td>
</tr>
</tbody>
</table>

[Add Post-Secondary Education History]

4.1.8 Enter your references

Supply reference contact information (required from some Faculty job openings only):

<table>
<thead>
<tr>
<th>References</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have not added any references to your application.</td>
</tr>
</tbody>
</table>

[Add Reference]
4.1.9 Complete the questionnaire

Complete the on-line application – Application Questionnaire section:

<table>
<thead>
<tr>
<th>Application Questionnaire</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Employment Status:</strong></td>
</tr>
<tr>
<td>☐ Never worked at UBC</td>
</tr>
<tr>
<td>☐ Worked at UBC within the last year</td>
</tr>
<tr>
<td>☐ Worked at UBC more than a year ago</td>
</tr>
<tr>
<td>☐ Current UBC Faculty/Staff member or student employee. (Are you applying through the correct Careers site? You must apply through UBC’s Faculty/Staff Self Service portal in order to maintain your internal rights/status to job postings).</td>
</tr>
</tbody>
</table>

**Are you a Canadian Citizen or have Permanent Resident status?**

☐ Yes

☐ No

**Do you have a Canadian Social Insurance number which starts with a 9?**

☐ Yes

☐ No

4.1.10 Complete the referral information

Complete the on-line application – Referral Information section.

Select from list of referral sources. Complete ‘Specific Referral Source’ if referral source not listed.

<table>
<thead>
<tr>
<th>Referral Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How did you find out about the job?</strong></td>
</tr>
</tbody>
</table>

| Specific Referral Source: |

□
4.1.11 Submit the application

You have not added any references to your application.

[Add Reference]

### Application Questionnaire

**Current Employment Status:**
- Never worked at UBC
- Worked at UBC within the last year
- Worked at UBC more than a year ago
- Current UBC Faculty/Staff member or student employee. (Are you applying through the correct Careers site? You must apply through UBC’s Faculty/Staff Self Service portal in order to maintain your internal rights/status to job postings).

**Are you a Canadian Citizen or have Permanent Resident status?**
- Yes
- No

**Do you have a Canadian Social Insurance number which starts with a 9?**
- Yes
- No

### Referral Information

How did you find out about the job? [UBC Careers Website]

Specific Referral Source:

---

**Complete Application**

[Save for later] [Submit] [Close Application] [Withdraw Application] [Careers Home]

---

Click on [Submit] button to submit application.
4.1.12 Agree to terms (External Applicants)

Review the Terms and Agreements. You will not be permitted to submit your application if you do not agree to the terms stipulated.

Submit Online Application

Terms and Agreements

As a condition of application/employment, I authorize investigation of all statements contained in this application. I understand that UBC's decision will be based solely on non-discriminatory considerations and that misrepresentation or omission of facts called for is just cause for the rejection of my application or dismissal.

- I agree to these terms
- I do not agree to these terms

Submit  Cancel Application  Return to Previous Page
4.1.13 Application confirmation

Confirmation of your application submission is displayed on the page below.

**My Applications**

- You have successfully submitted your job application.

<table>
<thead>
<tr>
<th>Application</th>
<th>Status</th>
<th>Application Date</th>
<th>Withdraw Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assoc Professor (tenure)</td>
<td>Applied</td>
<td>02/06/2013 10:04AM</td>
<td></td>
</tr>
</tbody>
</table>

You will also receive a confirmation email.

**Your online resume has been successfully submitted**

UBC, NOREPLY@UBC.CA

Sent: Wed 2/6/13 10:41 AM

To: Cam, Michael

(Please Note: This message was automatically generated. Please do not respond.)

Dear Michael Cam,

Thank you for expressing an interest in the following position(s) submitted on 2013-02-06:

14082-Assoc Professor (tenure)

The search committee/interview team will review applications following the application deadline. Recruiting practices at UBC can differ from department to department. Some departments contact all applicants, some just shortlisted applicants. We encourage you to view the status of your application by logging in to the myCareer application and using the 'My Career Tools' feature.

For more information about what it's like to work at UBC, visit our virtual Welcome and Resource Centre at www.ubc.ca/welcome.

For more information on how we're building a better workplace, visit our Focus on People website at www.focusonpeople.ubc.ca.

To review your information, click the following link.

https://mycareers.adm.ubc.ca/lso/erecruit/EMPLOYEE/HRMS/pr/HRS_HRAM.HRS_CE.GBL?Page=HRSE_CPHM_PRE&Action=AB&SiteId=1

Application status will be updated to indicate progress (ie, applied, interview, position filled, etc.)

Applicants may withdraw their application at any time by clicking on the **Withdraw Application** push button.

Applicants may also update their resume at any time by drilling into your application. From the **Careers Home** page, applicants can access their applications by clicking on the ‘# Applications’ hyperlink under **My Career Tools**.

You may also update your resume at any time by drilling into your application. From the **Careers Home** page, you can access all applications by clicking on the ‘# Applications’ hyperlink under **My Career Tools**.
This will take you to the applications page which shows all current applications.

My Career Tools

Michael Carr

Edit Profile

Resumes

<table>
<thead>
<tr>
<th>Resume Title</th>
<th>Attached File</th>
<th>Created</th>
<th>Delete Resume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assoc Professor (tenure)</td>
<td>135684-2013-02-06-10-26.pdf</td>
<td>02/06/2013 10:26AM</td>
<td></td>
</tr>
</tbody>
</table>

Return to Previous Page
Click on ‘Remove and Replace Resume/CV’. The system will prompt you through the resume/CV upload process.

Apply Now
Complete Application

You are applying for:
Assoc Professor (tenure)

Cam-135684-2013-02-06-10-26.pdf ➔ Remove and Replace Resume/CV

Michael Carn
Edit Profile

After you’ve uploaded you’re updated resume, click on the button:

Apply Now
Complete Application

You are applying for:
Assoc Professor (tenure)

Cam-135684-2013-02-06-11-09.pdf ➔ Remove and Replace Resume/CV

Michael Carn
Edit Profile

Save New Resume

Your resume has been updated. (25002,199)

OK
4.2 Search for Jobs

There are several methods to search for job openings.

Basic Searches can be performed on the Careers Home page or from the Job Search page – Job Search link. Search for jobs that contain key words that fall within specific posting dates.
Advanced searched enables you to enter additional search criteria. You can save your search criteria as a saved search or as a ‘Job Alert’. As new job openings are posted, the system will automatically notify you if any new job openings match the search criteria set up in your Job Alert. You will receive an email with a link to the UBC Careers site and your job alert search results. The system also posts a notification in the Notifications box on the Careers Home page.

**Job Search/Set Up Job Alerts**

![Advanced Job Search Form]

Enter Keywords:  
Select Locations:  
To select multiple locations hold down the Ctrl key (Command key for Macs) while clicking selections

Select Empl. Group:  
Select Job Function:  
Full/Part Time:  
Regular/Temporary:  
Job Opening ID:  
Desired Pay:  
Find Jobs Posted Within:  
Display Results Sorted By:

[Search] [Clear] [Set Up Job Alert] [Basic Search] [Search Tips]
Select criteria for Job Alert and then click on **Set Up Job Alert** to save and run your Job Alert.

Save Search/Job Alert.

**Save Search/Set Up Job Alert**

<table>
<thead>
<tr>
<th>Name your search/Job Alert:</th>
<th>New faculty postings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use As Job Alert</strong></td>
<td></td>
</tr>
<tr>
<td>Send Job Alert notification to this email Address:</td>
<td><a href="mailto:applicant@mail.com">applicant@mail.com</a></td>
</tr>
</tbody>
</table>

| Save | Cancel |

Run the search manually or let the system notify you automatically. Click on **My Saved Searches** to access your saved searches/Job Alerts

**My Saved Searches**

<table>
<thead>
<tr>
<th>Saved Search and Job Agents</th>
<th>Created On</th>
<th>Job Agent Email Address</th>
<th>Run Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW FACULTY POSTINGS</td>
<td>2013-02-06</td>
<td><a href="mailto:applicant@mail.com">applicant@mail.com</a></td>
<td>Edit</td>
</tr>
</tbody>
</table>

[Job Search]
4.3 Manage your Profile/Career Tools

4.3.1 My Profile – External Applicants

For external applicants, profile information is created and maintained within the Careers site. Changes to Profile information should be made prior to submitting applications.
**Edit Profile**

You can update your name, address, phone number and email here. Changes made to your contact details on this page will be updated on all of the jobs you have applied to.

<table>
<thead>
<tr>
<th>Member Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name:</td>
</tr>
<tr>
<td>Password:</td>
</tr>
<tr>
<td>Preferred Method of contact:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Legal Name (as it appears on your Social Insurance Card or other Government Identity Card)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Prefix:</td>
</tr>
<tr>
<td>*First Name:</td>
</tr>
<tr>
<td>Middle Name:</td>
</tr>
<tr>
<td>*Last Name:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country:</td>
</tr>
<tr>
<td>Address 1:</td>
</tr>
<tr>
<td>Address 2:</td>
</tr>
<tr>
<td>Address 3:</td>
</tr>
<tr>
<td>Address 4:</td>
</tr>
<tr>
<td>City:</td>
</tr>
<tr>
<td>Province:</td>
</tr>
<tr>
<td>Postal:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Email Type:</td>
</tr>
<tr>
<td>Email Address:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Phone Type:</td>
</tr>
<tr>
<td>Phone Number:</td>
</tr>
<tr>
<td>Extension:</td>
</tr>
</tbody>
</table>

[Add Another Phone Number]

[Save] [Return to Previous Page]
4.3.2 My Profile – Internal Applicants

For internal applicants, profile information is retrieved from your personal data information entered in UBC’s Human Resources Management System (HRMS). Therefore, any changes to your profile information appearing in myCareers must be made via UBC’s Faculty and Staff Self Service application. Profile information appearing incorrect in myCareers needs to be corrected in Faculty and Staff Self Service prior to submitting your application.

My Profile

Need to update your Profile? Go to ‘myPersonal Info’ in UBC Faculty and Staff Self Service.

<table>
<thead>
<tr>
<th>Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Format:</td>
<td>English</td>
</tr>
<tr>
<td>Name Prefix:</td>
<td>Mr</td>
</tr>
<tr>
<td>First Name:</td>
<td>Michael</td>
</tr>
<tr>
<td>Middle Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td>Cam</td>
</tr>
<tr>
<td>Name Suffix:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Country:</td>
<td>Canada</td>
</tr>
<tr>
<td>Address 1:</td>
<td>9491 Dunsmry Place</td>
</tr>
<tr>
<td>Address 2:</td>
<td></td>
</tr>
<tr>
<td>Address 3:</td>
<td></td>
</tr>
<tr>
<td>Address 4:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td>Richmond</td>
</tr>
<tr>
<td>Province:</td>
<td>British Columbia</td>
</tr>
<tr>
<td>Postal:</td>
<td>V7C 4N8</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Address</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Email Type:</td>
<td>Primary</td>
</tr>
<tr>
<td>Email Address:</td>
<td><a href="mailto:noemail@ubc.ca">noemail@ubc.ca</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phone</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternate Phone Type:</td>
<td>Campus</td>
</tr>
<tr>
<td>Phone Number:</td>
<td>604-622-4802</td>
</tr>
<tr>
<td>Extension:</td>
<td></td>
</tr>
<tr>
<td>Alternate Phone Type:</td>
<td>Cellular</td>
</tr>
<tr>
<td>Phone Number:</td>
<td>604-374-4272</td>
</tr>
<tr>
<td>Extension:</td>
<td></td>
</tr>
<tr>
<td>Primary Phone Type:</td>
<td>Home</td>
</tr>
<tr>
<td>Phone Number:</td>
<td>604-272-4262</td>
</tr>
<tr>
<td>Extension:</td>
<td></td>
</tr>
</tbody>
</table>
4.3.3 Save Jobs

Save jobs that you may be interested in and apply to these jobs at a later date (but before the closing date).

View your saved jobs by clicking on the My Saved Jobs link.

My Saved Jobs

You have successfully saved your new jobs.

Return to Previous Page  Find Jobs
4.3.4 Draft or Incomplete Applications

You can save a draft of your application and submit the application at a later time (but before the closing date). To save a draft, click the ‘Save for Later’ button at the bottom of the application page.

**Apply Now**

**Complete Application**

You are applying for:

**Assoc Professor (tenure)**

Remove

Add Another Job to Application

---

Cam-135684-2013-02-06-10-26.pdf  Remove and Replace Resume/CV

Michael Carr

Edit Profile

---

Save for later  Submit  Cancel Application  Withdraw Application  Careers Home

Complete Application

**Work Experience**

You have not added any employment information to your new application.

Your saved application appears under status ‘Draft’.

---

4.3 Manage your Profile/Career Tools
4.3.5 Interview Schedules

Hiring managers can elect to notify applicants of upcoming interviews by email and via a notification on the applicant’s myCareer home page.
Click the subject link in the Notifications area to access the Interview Details page.

The interview schedule includes the date and time, the name of each interviewer, and location of the interview.
5
Managing Openings and Applicants
5.1 Manage Applicants Page Overview

Once you have created your job opening and posting, most of the remaining recruiting tasks can be launched from one central page we call the ‘360-degree Page’. From this page you’ll be able to:

- Review job opening/posting details
- Review applicant data including resume attachments
- Review internal applicants’ relationship with UBC (ie, current Job, Service Date, Seniority, etc.)
- Download an applicant list to Excel
- Manually add applicants
- Shortlist applicants
- Decline applicants
- Upload reference letters
- Manage interviews
- Prepare job offers
- Produce offer letters
- Manage pre-hire checklists
- Manage and upload pre-hire documents (ie, signed offer letters, copy of SIN card, etc.)
- Prepare applicants for hire
- Send emails to applicants
- Review applicants’ current application ‘Disposition’ status

![Job Opening](image)

![Manage Applicants Table](image)
5.2 Manually Add Applicants

Manually linking applicants to job openings may be required for applicants who are unable to use our system.

Navigation:

Recruitment>Manage Your Applicants>Manage Applicants and Openings

or

Recruitment>Manage Your Applicants>Add New Applicant to Opening

Click on the ‘Add New Applicant’ link.

In the Add New Applicant page, you have the option of adding an internal (or former employee) or external applicant.

To add an internal applicant, enter the Employee ID. Personal information will automatically populate from their HRMS record.

To add an external applicant, leave the ‘Applicant Type’ value set to ‘External’. Manually add personal information. Click on Link Applicant to Job to continue.
# Add New Applicant

**Applicant Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmpID:</td>
<td></td>
</tr>
<tr>
<td>Status Date:</td>
<td>2009/02/25</td>
</tr>
<tr>
<td>*Applicant Type:</td>
<td>External Applicant</td>
</tr>
<tr>
<td>Preferred Contact:</td>
<td>Not Specified</td>
</tr>
</tbody>
</table>

**Legal Name**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Prefix:</td>
<td></td>
</tr>
<tr>
<td>*First Name:</td>
<td></td>
</tr>
<tr>
<td>Middle Name:</td>
<td></td>
</tr>
<tr>
<td>*Last Name:</td>
<td></td>
</tr>
</tbody>
</table>

**Address**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country:</td>
<td>Canada</td>
</tr>
<tr>
<td>Address 1:</td>
<td></td>
</tr>
<tr>
<td>Address 2:</td>
<td></td>
</tr>
<tr>
<td>Address 3:</td>
<td></td>
</tr>
<tr>
<td>Address 4:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
</tr>
<tr>
<td>Province:</td>
<td></td>
</tr>
<tr>
<td>Postal:</td>
<td></td>
</tr>
</tbody>
</table>

**Email Addresses**

<table>
<thead>
<tr>
<th>Preferred</th>
<th>Email Type</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Primary</td>
<td></td>
</tr>
</tbody>
</table>

**Phone Numbers**

<table>
<thead>
<tr>
<th>Preferred</th>
<th>Phone Type</th>
<th>Telephone</th>
<th>Extension</th>
<th>Country Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Enter the reason (optional) for manually adding the applicant and then click on the Submit button.

On the next page, you can add Applicant Notes (optional), and Applicant Data (which includes the ability to upload the applicant’s resume). Applicant data should be added for applicants you are forwarding on to your interview team for review. To skip this step, click on the ‘Return to Applicant List’ link.
5.3 Review Applicants

From the 360-degree page, drill into Applicant Names to view applicant data and attachments.

Click on Resume icon, if present, to open Resume attachment. You may need to allow pop-ups or adjust your internet security to enable file downloads (see below).

Drill into ‘Current Relationship with UBC’ values to view current employment information for internal applicants.

Click on ‘Return to Applicant List’ link to return to the 360-degree page.

**Job Opening**

<table>
<thead>
<tr>
<th>Job ID:</th>
<th>14082</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location:</td>
<td>Vancouver - Point Grey Campus</td>
</tr>
<tr>
<td>Employment Group:</td>
<td>Faculty (Fac Assn)</td>
</tr>
<tr>
<td>Business Title:</td>
<td>Assoc Professor (tenure)</td>
</tr>
<tr>
<td>Department:</td>
<td>UBCO-BarberArts &amp; Sciences Unit 3</td>
</tr>
<tr>
<td>Full/Part Time:</td>
<td>Full-Time</td>
</tr>
<tr>
<td>FTE:</td>
<td>1.000000</td>
</tr>
<tr>
<td>Desired Start Date:</td>
<td>12/01/2012</td>
</tr>
<tr>
<td>Job End Date:</td>
<td></td>
</tr>
<tr>
<td>Funding Type:</td>
<td>Budget Funded</td>
</tr>
<tr>
<td>Other:</td>
<td></td>
</tr>
<tr>
<td>Closing Date:</td>
<td>07/29/2013</td>
</tr>
</tbody>
</table>

Available Openings: 1

**Manage Applicants**

Display: All

Shortlisting Rules & Guidelines

<table>
<thead>
<tr>
<th>Applicant Name</th>
<th>ID</th>
<th>Current Relationship with UBC</th>
<th>Disposition</th>
<th>Resume/CV</th>
<th>Last Updated</th>
<th>Take Action</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>135084</td>
<td>External Applicant</td>
<td>Applied</td>
<td>02/05/2013 10:40AM</td>
<td>*Select Action...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Save

Return to Previous Page
5.4 Reviewing Applicants – Interview/Selection Team

5.4.1 Routing applicants

Interview Team members you designated in your Job Opening, can review applicant details as soon as you change an applicant’s disposition to ‘Shortlisted’ or ‘Interview’. Applicant will only be available to your interview team members when they are moved to one of these two statuses. Moving applicants to a different status (ie, Prepare Job Offer, Decline, etc.), will cause those applicants to be removed from the page the interview team uses.

To route all applicants to your interview team, select **Select All, Group Action: Route/Short List Applicant**.

Click on the **Go** button to continue.
Select a reason for the routing and then click on the **Submit** button.
All designated interview team members (as listed in the Job Opening Details page), will receive a notification email as soon as applicants are changed to disposition status ‘Route/Shortlist’:

Hello,

You have been identified as an interview team/selection committee member for a recent job opening. Applicants are now ready for review.

Applicant data can be viewed in Faculty/Staff Self Service via CWL. Look for ‘myRecruitment - Review Applicants’ or follow this link: https://www.auth.ubc.ca/auth/login?serviceName=hr_portal_psa&serviceParams=context%3D0%26target%3D

If you have difficulty opening resume attachments, please refer to this link for help: http://www.hr.ubc.ca/administrators/erecruit/faq/opening-downloading-documents/

Note: You may receive this email notification multiple times for the same job opening when additional applicants are routed to you.

Thank you.

Interview team members use a self-service page to review applicants.

**Navigation:** Faculty and Staff Self Service>myRecruitment>Review applications
Click on **Job Opening ID** link to move to the applicant listing.

Click on the **View Posting/Ad** push button to see the original job posting.

Use the **Email me when New Applicants Apply** checkbox to turn on/off email notifications you receive (as an interview team member) as new applicants are routed to you for review. Ensure you click on the **Save** button if you use this feature.
Drilling into the Job Opening ID in the first page of the Review Applicants component, displays this secondary page:

Review Applicants

Job Opening: 5001
Posting Title: FOR TESTING PURPOSES ONLY
Department: Human Resources

This page lists all applicants routed to the interview team members by the department recruiter.

All displayed values can be re-sorted by clicking on a column header.

- **Applicant Name:** Displays name supplied by the applicant (LastName,FirstName).
- **Applicant ID:** Applicant Identification number assigned by the system.
- **Current Relationship to UBC:** External Applicant, Former Employee or current UBC employee and current employment affiliation.
- **CDN Citizen/Perm.Resident:** Canadian citizenship Y/N based on information supplied by applicant.
- **Priority#:** Applicant priority number (staff only). Click on What do priority numbers mean? link for more information on priority numbers.
- **Date Resume/CV Updated:** Indicates the date and time an applicant updated their resume (if blank no updates have taken place).
- **Open Resume/CV:** Open individual resume/CV packages by clicking the Open Resume/CV button. If button is greyed out, no resume/CV package exists for that particular applicant. See instructions on next page for how to open and print multiple resume/CVs.
- **View Application:** Click on the View Application link to view an applicant summary page. See View Application information section on page 108.
- **Application Reviewed:** Keep track of applications you have reviewed by selecting this checkbox. Ensure you click on the Save button if you use this feature.
- **Date Applications Reviewed:** Record the date and time you selected the ‘Applications Reviewed’ checkbox.
- **My Ranking:** Free-form field to record a ranking or comment for each applicant. Ensure you click on the Save button if you use this feature.
5.4.2 Opening and Printing Resumes/CVs

Use the **Open Resume/CV** and the **Open Selected Resume/CV** buttons in the Review Applicants page to open resume/CV packages, individually or in bulk.

Note: If button is greyed out, no resume exists for that particular applicant.

To open and print an individual resume/CV package, click on the **Open Resume/CV** button against a single applicant. The system will open a secondary window which displays a PDF version of the applicant’s resume/CV package.

For problems with opening resume/CV attachments, refer to section 6.3 Opening/Viewing Attachments - Troubleshooting FAQs below on page 155. The resume/CV package can now be printed using your browser’s print functionality.

To open and print multiple resume/CV packages, select the applicants’ by using the individual checkboxes or use the **Select All** hyperlink to select all applicants with resume/CV attachments.

The screenshot below illustrates how to open and print all resume/CV’s submitted by all applicants:

<table>
<thead>
<tr>
<th>Applicant Name</th>
<th>Applicant ID</th>
<th>Application Date</th>
<th>Current Relationship with UBC</th>
<th>CDN Citizen (Y/N)</th>
<th>Priority #</th>
<th>Date Resume/CV Merged</th>
<th>Open Resume/CV</th>
<th>View Application</th>
<th>Applicant Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith, Jane</td>
<td>39273</td>
<td>03/18/2010</td>
<td>External Applicant</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Smith, Brent</td>
<td>30281</td>
<td>03/18/2010</td>
<td>External Applicant</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Smith, Jane</td>
<td>39276</td>
<td>03/18/2010</td>
<td>External Applicant</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Boudreau, Robert</td>
<td>5497</td>
<td>03/10/2009</td>
<td>External Applicant</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Hansen, Kathy</td>
<td>6965</td>
<td>03/18/2010</td>
<td>External Applicant</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Boudreau, Robert</td>
<td>5491</td>
<td>03/10/2009</td>
<td>External Applicant</td>
<td>N</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Green, John</td>
<td>39262</td>
<td>03/18/2010</td>
<td>External Applicant</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Lee, Edmund</td>
<td>3184</td>
<td>02/28/2010</td>
<td>Current M&amp;P (AAPS)</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Kompauer, Emily Elizabeth</td>
<td>42395</td>
<td>04/19/2010</td>
<td>Current M&amp;P (AAPS)</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Jordan, Anna Danielle</td>
<td>3180</td>
<td>03/13/2009</td>
<td>Current M&amp;P (AAPS)</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Boudreau, Kathy</td>
<td>3160</td>
<td>03/18/2010</td>
<td>Current M&amp;P (AAPS)</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Boudreau, Kathy</td>
<td>3160</td>
<td>11/02/2009</td>
<td>Current M&amp;P (AAPS)</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Boudreau, Kathy</td>
<td>3160</td>
<td>03/13/2009</td>
<td>Current M&amp;P (AAPS)</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Boudreau, Kathy</td>
<td>3160</td>
<td>03/18/2010</td>
<td>Current M&amp;P (AAPS)</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Boudreau, Kathy</td>
<td>3160</td>
<td>03/18/2010</td>
<td>Current M&amp;P (AAPS)</td>
<td>Y</td>
<td>99</td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
<tr>
<td>Fortham, Susan J</td>
<td>31199</td>
<td>12/10/2009</td>
<td>Current CUPE 2950</td>
<td>99</td>
<td></td>
<td></td>
<td>Open Resume/CV</td>
<td>View Application</td>
<td></td>
</tr>
</tbody>
</table>

The system will open a secondary window which displays a PDF version of all applicants’ resume/CV packages, merged into one single document which can then be printed.
### View Application Data

When selecting the View Application link against a single applicant, the following applicant data summary page will display:

![Applicant Data Summary](image)

- **Personal Information**
  - **Name:** Jane Greene
  - **ID:** 7181
  - **Contact:** Email
  - **Phone:** 555-555-5555
  - **Address:**

- **Application Information**
  - **Date Entered:** 2012/01/25
  - **Highest Education Level:** Master's Degree

- **Education**
  - **Degree:** Associate of Engineering, Bachelor of Medicine, Doctor of Medicine
  - **Schools:** UBC, British Columbia, Canada

- **Work Experience**
  - **Start Date:**
    - 1990/06/01: X Company
    - 2005/06/01: Y Company
  - **Position:** Director
  - **Provinces:**
    - British Columbia, Canada

- **References**
  - **Name:** Roger Conner, Harry Smith, Janet Smith
  - **Employee:** X Company
  - **Position:** Director
  - **View Contact Info**

- **References/Reference Letters Received**

- **Applicant Questionnaire)**

- **Interview Team/Selection Committee Comments**
  - **Name:** Raymond, Robert, Kathy
  - **Public Comments:**
  - **My Private Comments:**

Enter comments you want to share with your departmental recruiter and interview team members in Public Comments.

Enter Comments only you can see in My Private Comments.

Note that both public and private comments about an applicant may be disclosed in accordance with terms of the Freedom of Information and Protection of Privacy Act.
5.5 Shortlist Applicants

From the 360-degree page, you can select individual applicants you’d like to add to your shortlist by selecting ‘1-Short List Applicant’ in the ‘Take Action’ field.
Alternatively, you can select multiple applicants to add to your shortlist by clicking on their names, selecting the Group Action ‘Short List Applicant’ and clicking on the Go button. Or click on the Select All hyperlink to select all applicants for the group action.
Disposition values update to ‘Short List’ for applicants selected. These applicants will be accessible by your interview team.
**Important Note:**

Applicant disposition statuses are visible to the applicant in their ‘myCareer’ home page.

However, some disposition statuses are changed for the applicant:

<table>
<thead>
<tr>
<th>What you See</th>
<th>What the Applicant Sees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied</td>
<td>Applied</td>
</tr>
<tr>
<td><strong>Route/Shortlist</strong></td>
<td><strong>Reviewing Resumes</strong></td>
</tr>
<tr>
<td>Interview</td>
<td>Interview</td>
</tr>
<tr>
<td>Draft Offer</td>
<td>Applied</td>
</tr>
<tr>
<td>Offer Pending</td>
<td>Applied</td>
</tr>
<tr>
<td>Offer Approved</td>
<td>Applied</td>
</tr>
<tr>
<td>Prepare for Hire</td>
<td>Hired</td>
</tr>
<tr>
<td>Hired</td>
<td>Hired</td>
</tr>
<tr>
<td>Decline</td>
<td>Position Filled or Cancelled</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Withdrawn</td>
</tr>
</tbody>
</table>
5.6 Schedule Interviews and Review Interview Schedule

Similar to shortlisting, you can manage interviews for individual or multiple applicants.
**Important Note:**

Applicant disposition statuses are visible to the applicant in their ‘myCareer’ home page.

However, some disposition statuses are changed for the applicant:

<table>
<thead>
<tr>
<th>What you See</th>
<th>What the Applicant Sees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied</td>
<td>Applied</td>
</tr>
<tr>
<td>Route/Shortlist</td>
<td>Reviewing Resumes</td>
</tr>
<tr>
<td><strong>Interview</strong></td>
<td><strong>Interview</strong></td>
</tr>
<tr>
<td>Draft Offer</td>
<td>Applied</td>
</tr>
<tr>
<td>Offer Pending</td>
<td>Applied</td>
</tr>
<tr>
<td>Offer Approved</td>
<td>Applied</td>
</tr>
<tr>
<td>Prepare for Hire</td>
<td>Hired</td>
</tr>
<tr>
<td>Hired</td>
<td>Hired</td>
</tr>
<tr>
<td>Decline</td>
<td>Position Filled or Cancelled</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Withdrawn</td>
</tr>
</tbody>
</table>
Details into this page should only be entered after applicants and interviewers have been contacted outside of this system and they have agreed to dates and times.

Enter the Interview Date, Interview Type, Start Time, End Time and Location.

Clicking on ‘Notify Interview Team’ and/or ‘Notify Applicant’ will generate and send notification emails to Interview Team/Applicant. Note that these emails assume that interviewers and applicants have already been contacted with the interview details.

Click on ‘Add Interviewer’ link to add additional interviewers. However, it is advisable to add additional interviewers to your Job Opening before scheduling interviews, as interviewers added to the Interview Schedule page will not be able to view applicants via Faculty/Staff Self Service. Only those designated in the Interview Team in your Job Opening will be given access to review applicants.

Disposition values update to ‘Interview’ for applicants selected. These applicants will be accessible by your interview team.

You can review individual interview schedules for applicants by clicking on their ‘Interview’ disposition or click on Interview Schedule link to review the entire interview schedule.
5.6 Schedule Interviews and Review Interview Schedule
5.6 Schedule Interviews and Review Interview Schedule

Review **Interview Schedule** for all applicants.

Note that John Smith was not shortlisted or selected for interview but appears on this page with no interview date/time.
Review Interview Schedule – Interview Team

Interview Team members you designated in your Job Opening, can review Interview Schedules as soon as you schedule interviews in the system.

Interview team members use a self-service page to review Interview Schedules

**Navigation:** Faculty and Staff Self Service>myRecruitment>Interview Schedule

---

An interview schedule will appear for each job opening the interviewer is designated as an interview team member and interviews have been scheduled.
Job Opening

Interview Schedule

Listed below are the interview schedules for the applicant(s) selected.

| Job ID: | 14755 |
| Location: | Vancouver - Point Grey Campus |
| Employment Group: | Faculty (Non-Fac Asgn) |
| Business title: | Research Associate |
| Department: | Electrical & Computer Engineering |
| Full/Part Time: | Part-Time |
| FTE: | 0.500000 |
| Desired Start Date: | 2013/02/15 |
| Job End Date: | 2013/08/14 |
| Funding Type: | Grant Funded |
| Closing Date: | 2013/02/14 |
| Available Openings: | 1 |

### Carole Jones

| Applicant Name: | Carole Jones |
| ID: | 3554 |

<table>
<thead>
<tr>
<th>Interviewer Name</th>
<th>Interview Date</th>
<th>Interview Type</th>
<th>Start Time</th>
<th>End Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>M Mouse</td>
<td>15/03/2009</td>
<td>Campus</td>
<td>9:00AM</td>
<td>10:00AM</td>
<td>General Services Admin building</td>
</tr>
</tbody>
</table>

### Catherine Anderson

| Applicant Name: | Catherine Anderson |
| ID: | 3244 |

<table>
<thead>
<tr>
<th>Interviewer Name</th>
<th>Interview Date</th>
<th>Interview Type</th>
<th>Start Time</th>
<th>End Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>M Mouse</td>
<td>15/03/2009</td>
<td>Campus</td>
<td>10:00AM</td>
<td>11:00AM</td>
<td>General</td>
</tr>
</tbody>
</table>

### Karen MacDonald

| Applicant Name: | Karen MacDonald |
| ID: | 3656 |

<table>
<thead>
<tr>
<th>Interviewer Name</th>
<th>Interview Date</th>
<th>Interview Type</th>
<th>Start Time</th>
<th>End Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>M Mouse</td>
<td>15/03/2009</td>
<td>Campus</td>
<td>11:00AM</td>
<td>12:00PM</td>
<td>General</td>
</tr>
</tbody>
</table>

### Linda Fung

| Applicant Name: | Linda Fung |
| ID: | 3657 |

<table>
<thead>
<tr>
<th>Interviewer Name</th>
<th>Interview Date</th>
<th>Interview Type</th>
<th>Start Time</th>
<th>End Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>M Mouse</td>
<td>15/03/2009</td>
<td>Campus</td>
<td>1:00PM</td>
<td>2:00PM</td>
<td>General</td>
</tr>
</tbody>
</table>
5.7 Download Applicant List

You may download a list of applicants along with key information about each applicant, into an Excel spreadsheet.
Click on the Download Applicant List hyperlink. The following dialogue box will appear:

Select ‘Open’ to view a ‘read-only’ version of the spreadsheet.

Select ‘Save as’ if you wish to edit the spreadsheet.

Sample Excel report:
5.8 Decline Applicants

Similar to shortlisting and managing interviews, you can decline individual or multiple applicants.
Enter the reason applicant was declined (optional). Comments may also be added.

Applicant’s Disposition status changes to ‘Decline.

Important Note:

Applicant disposition statuses are visible to the applicant in their ‘myCareer’ home page.

However, some disposition statuses are changed for the applicant:

<table>
<thead>
<tr>
<th>What you See</th>
<th>What the Applicant Sees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied</td>
<td>Applied</td>
</tr>
<tr>
<td>Route/Shortlist</td>
<td>Reviewing Resumes</td>
</tr>
<tr>
<td>Interview</td>
<td>Interview</td>
</tr>
<tr>
<td>Draft Offer</td>
<td>Applied</td>
</tr>
</tbody>
</table>
5.9 Email Applicants

Similar to routing/shortlisting, managing interviews and declining applicants, you can email individual or multiple applicants.
As the originator of the email, your email address will be added as a ‘bcc’, but may be manually removed.

This email address is extracted from your self-service information (primary email type).
5.10 Making an offer (tenure)

Once the interview process is over, you should be ready to offer the job to one of your applicants.

Select the applicant you’d like to prepare a job offer for by using the Take Action value of ‘4-Prepare Job Offer’:
Complete all required fields in Prepare Job Offer page and click on the ‘Save’ button:
Ensure you enter all fields in sequence, as they appear on the page in order to avoid invalid error message.

- You may change the job code from the original value used in the Job Opening by using the **Revised Job Code** field. However, the job code must first be changed in the corresponding position in Position Management.

- The **Total Offer Amount** should reflect the total monthly base compensation amount. This would include things such as administrative stipends, honoraria, non-university funds (NUF) or memo appointment earnings (MAP). However, ensure to separate out different types of earnings in the **Account and Compensation** section (ie, REG=$5000, ADM=$1000).

- **Appointment Start Date**, **Appointment End Date** and the **Ongoing** fields default from the Job Opening but may be overridden on the Offer page.

- **Foreign Worker** is a required field and must be completed before the offer letter is generated. If your offer is not being made to a foreign worker, select ‘Not Applicable’.

- All job offers require that an offer letter be generated. Click on **Generate Offer Letter** after completing all fields preceding the link or click on **Upload my Own Offer Letter** if you do not wish to use a system-generated offer letter.

- Enter any comments for yourself or for your approver.

- **Earnings Code**, **Speedchart** and **Account** are required fields and must be completed prior to submitting your offer for approval.

- For multi-appointment offers (ie, Dean/Professor), only one offer can be submitted through this system. The primary, ongoing job should be submitted through this system. Submit the secondary appointment via a Faculty Appointment Form.

**Note that for tenure track positions, the offer approval is not done electronically through the system. Click on ‘Print Appointment Form’ to download a Word version of the Faculty Appointment Form and obtain the approvals manually.**
When you click on ‘Print Appointment Form’, the panel below should appear. If the panel does not appear, please refer to section 6.3 Opening/Viewing Attachments - Troubleshooting FAQs below on page 155.

Please close this window after download has completed ...

Click ‘OK’ to download and/or open the document in Microsoft Word for printing.
5.11 Making an offer (non-tenure)

Once the interview process is over, you should be ready to offer the job to one of your applicants.

Select the applicant you’d like to prepare a job offer for by using the Take Action value of ‘4-Prepare Job Offer’:
• Ensure you enter all fields in sequence, as they appear on the page in order to avoid invalid error message.

• You may change the job code from the original value used in the Job Opening by using the Revised Job Code field. However, the job code must first be changed in the corresponding position in Position Management.

• The Total Offer Amount should reflect the total monthly base compensation amount. This would include things such as administrative stipends, honoraria, non-university funds (NUF) or memo appointment earnings (MAP). However, ensure to separate out different types of earnings in the Account and Compensation section (ie, REG=$5000, ADM=$1000).

• Appointment Start Date, Appointment End Date and the Ongoing fields default from the Job Opening but may be overridden on the Offer page.
- **Foreign Worker** is a required field and must be completed **before** the offer letter is generated. If your offer is not being made to a foreign worker, select ‘Not Applicable’.

- All job offers require that an offer letter be generated. Click on **Generate Offer Letter** after completing all fields preceding the link or click on **Upload my Own Offer Letter** if you do not wish to use a system-generated offer letter.

- Enter any comments for yourself or for your approver.

- **Earnings Code, Speedchart** and **Account** are required fields and must be completed prior to submitting your offer for approval.

- Once your offer has been approved, offer details cannot be modified and will be transferred to the **Prepare for Hire** step.

- You may be required to provide your approver with further documentation on your applicant, such as the signed offer letter, immigration documentation for foreign workers, copy of SIN card, Funding Transfer form, etc. All these types of documents can be uploaded (scanned copies) and reviewed by your approver (see: **Manage and View Applicant Attachments**). Ensure that any documentation you want available to your approver is uploaded prior to submitting your offer.

- For multi-appointment offers (ie, Dean/Professor), only one offer can be submitted through this system. The primary, ongoing job should be submitted through this system. Submit the secondary appointment via a Faculty Appointment Form.
Complete all required fields in Prepare Job Offer page and click on the **Submit** button. If you have not already done so, you may be asked to click on ‘Review and Confirm Approvers’ to confirm the approvers for this transaction.

Click on ‘Review and Confirm Approvers’ and you will be presented with a list of approvers which have been determined by the rules entered into the Workflow Rules Repository for your department.

![Image of Approvers List]

If the list is correct, confirm this by selecting **Yes** and click on **Submit**.

If the list is **not** correct, select **No** and click on **Submit**. Contact your department workflow admin to review and modify the rules that has been setup for your department. After the problem has been fixed, re-submit the position for approval and review the list again.
After your job offer has been submitted, an ‘Approvals’ page appears indicating who the job offer was routed to for approval and review.

Note that the departmental approval of the job offer is not recorded in this system and is deemed to have been received after the offer is submitted in eRecruit.

There are three approval steps for Faculty job offers:

1. Dean’s Office
2. Faculty Relations (UBC-V) or Human Resources (UBC-O)
3. Provost’s Office

**UBC-V Faculty Job Offer example:**
All job offers require approval from approvers which have been determined by the rules entered into the Workflow Rules Repository for your department.

As each approver submits their approval, the next approver will be notified via email that there is an outstanding job offer requiring their approval.

The ‘Pending’ approval status changes to ‘Approved’ (or ‘Pushed Back’ if not approved) once the approver submits their approval. Then the next approver is automatically routed the job offer for their approval.

This example of an outstanding job offer has 4 approval steps.

You may also insert additional approvers and reviewers between steps by clicking on . A panel will appear to allow you to select the user as well as their role in the approval process.

Only once all three approvals are received, will the job offer overall approval status change to ‘Offer Approved’ and the applicant can then be pushed to the next and final recruiting step, Prepare for Hire.
The Pre-Hire Checklist includes typical documentation which may be required prior to hiring an applicant.
All items in the checklist below are typically required for all Faculty Tenure/Tenure Track job offer approvals, but can also be adapted to Staff job offers.

**Responsible ID:** Enter the Employee ID of the person responsible for gathering these documents (usually the departmental recruiter). Click on the magnifying glass to search by name.

**Status & Status Date:** Select the current status of obtaining the document and the status date.

All items with a status of ‘Uploaded’ should exist in the applicant’s ‘Pre-Hire Document’ upload page (see Manage and View Applicant Attachments).

Select the buttons to add or delete checklist items.

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Item Code</th>
<th>Description</th>
<th>*Briefing Status</th>
<th>*Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>UBC001</td>
<td>Funding Information</td>
<td>Uploaded</td>
<td>2009/02/26</td>
</tr>
<tr>
<td>200</td>
<td>UBC002</td>
<td>SIN card or SIN App (Exterals)</td>
<td>Uploaded</td>
<td>2009/03/02</td>
</tr>
<tr>
<td>300</td>
<td>UBC003</td>
<td>Faculty Letter of Rationale</td>
<td>Requested</td>
<td>2009/03/01</td>
</tr>
<tr>
<td>400</td>
<td>UBC004</td>
<td>Resume/CV</td>
<td>Uploaded</td>
<td>2009/01/15</td>
</tr>
<tr>
<td>500</td>
<td>UBC005</td>
<td>Letters of Reference</td>
<td>Requested</td>
<td>2009/02/26</td>
</tr>
<tr>
<td>600</td>
<td>UBC006</td>
<td>Summary of Work Exp/Education</td>
<td>Requested</td>
<td>2009/03/01</td>
</tr>
<tr>
<td>700</td>
<td>UBC007</td>
<td>Signed Offer Letter (M&amp;P,BOG)</td>
<td>Requested</td>
<td>2009/02/26</td>
</tr>
<tr>
<td>800</td>
<td>UBC008</td>
<td>Funding Transfer Form</td>
<td>Forwarded</td>
<td>2009/02/20</td>
</tr>
<tr>
<td>900</td>
<td>UBC009</td>
<td>Joint Appointment Form</td>
<td>N/A</td>
<td>2009/02/26</td>
</tr>
<tr>
<td>1000</td>
<td>UBC010</td>
<td>Work Permit - Foreign Hires</td>
<td>Uploaded</td>
<td>2009/03/02</td>
</tr>
<tr>
<td>1100</td>
<td>UBC011</td>
<td>Years in Rank Form</td>
<td>*Select...</td>
<td>2009/02/25</td>
</tr>
</tbody>
</table>

5.12 Manage and View Applicant Checklists
Manage and View Applicant Attachments

Use the ‘Applicant Attachments’ page to upload documents required for the Job Offer/Hire.
Upload all required documents.

What information/documents are required?

- Signed offer letters for all Faculty and M&P job offers are required before you will be permitted to proceed to the 'Prepare for Hire' step.
- The applicant's Social Insurance Number and copy of the applicant's SIN card or application if they are an external applicant.
- Citizenship country and status is required for all foreign hires (do not complete for Canadian citizens or permanent residents).
- Visa Permit information and copy of appropriate work permit for all foreign hires.
5.13 Offer Approval Process

The designated approver will receive an email notification advising them that a Job Offer has been entered which requires their approval. The approver can click on the provided hyperlink embedded in the email to access their ‘Worklist’ or access their Worklist directly by logging into the system. Click on the hyperlink to access the job offer.

- Approver can drill into the ‘Pre-Hire Documents’ link to review all uploaded documents.
- Approver then selects ‘Approve’ or ‘Pushback’. ‘Pushback’ requires comments as to why approval is not being granted.
- Approved and Pushbacked approvals are routed back to the originator via their Worklist and a notification email.
- With Faculty job offers, an additional notification (not approval) is routed (Email & Worklist item) to Faculty Relations (note this notification will be changing to an approval as well as a final approval step to the Vice-Provost – in development).
5.14 Prepare Applicant for Hire

After the job offer to the applicant has been approved and verbal acceptance of the job has been obtained from the applicant (signed offer letter required for Faculty and M&P jobs), you can now proceed to the ‘Prepare for Hire’ step. This step replaces the need for a Staff or Faculty appointment form.

**NOTE:** For tenure hires, Faculty Relations will submit the ‘Prepare for Hire’ transaction in eRecruit on your behalf when they receive the eRecruit Faculty Appointment Form (see ‘Making an Offer – Tenure’).

Select ‘7-Prepare for Hire’ in the ‘Take Action’ field for the appropriate applicant.
Complete required fields in **Preliminary Data** page.

- Verify that all non-updateable fields are correct.
- **Applicant Ranking**: Indicate if this applicant is your first, second or third choice applicant pick.
- **Type of Hire**: Click on the **Need help completing this?** link to assist you in selecting the correct value.
- **Employee ID**: This field will display for External applicants only. Click on **Assign/Verify Employee ID**.

---

**Prepare For Hire**

Gareth Chalmers

Applicant ID: 124782  Employee ID: 

**Preliminary Data**

- **Application Status**: Offer Approved
- **Status Last Updated**: 2013/01/09
- **Job Opening**: 13238 Research Associate: Unconventional Reservoirs
- **Job Code**: NBRG70 Research Associate
- **Business Unit**: UBC01 UBC - Vancouver
- **Department**: EOSC Earth and Ocean Sciences
- **Start Date**: 2012/09/16
- **Date Applied**: 2012/06/25
- ***Applicant Ranking**: 1st choice

**Assign/Verify Employee ID**

**Hire Comments**

**Save & Submit**  **Cancel**  **Next**

*Not required for internals and former employees*
Former employees who have applied through the external Careers site (and not Faculty/Staff Self Service), will not be connected to their former Employee ID. Prior to hiring any applicant through eRecruit, we need to ensure that all data being transferred is associated with an Employee ID if one previously existed for the applicant. Using the existing ‘Early Assignment of HRMS Employee ID’ functionality will do this for you.

- **Social Insurance Number:** If the applicant’s SIN was entered in the ‘Pre-Hire Documents’ page at the offer stage, the SIN will automatically populate for you. If not, enter the SIN manually and click on ‘Search’. Note: in order to proceed with the ‘Prepare for Hire’, you must provide a SIN number for your applicant.

- If the SIN entered does not exist in the system, this page will display.

- **Birthdate:** If the applicant’s birthdate was entered in the ‘Pre-Hire Documents’ page at the offer stage, the birthdate will automatically populate for you. If not, enter the birthdate manually and click on ‘Search’.

  **Note:** If the SIN entered does exist in the system, you will be prompted to reactivate the EmployeeID associated with the SIN supplied.
Click on **Add New Employee ID** to add new Employee ID if no name matches applicant’s name in the search results.

All fields should auto-populate for you from data already supplied in previous recruiting steps. Complete any missing fields.

Click on **Save** button.

Confirmation of new Employee ID. Click on **Return to Prepare for Hire**
Complete required fields in Employee Personal Information page.

If all data has been previously supplied either by the applicant or in the ‘Pre-Hire Documents’ upload page, then the only required fields left on this page should be ‘Gender’. Otherwise complete all other required fields. Note that foreign worker hires must have a temporary SIN# (ie, 900-series SIN#) and work permits uploaded in order to submit the ‘Prepare for Hire’.
Complete required fields in **Appointment Information** page.
• **Termination Date:** Enter a term end date if there is one but not previously provided. Note that this date must reflect the last date to be worked + 1 day.

• **Action Reason:** Select from the list of values. Note that some Actions will not have Action Reasons associated with them or the Action Reason may be the same as the Action.

• **Full/Part Time:** Click on ‘Override’ button if value needs to be changed.

• **FTE:** Click on ‘Override’ button if value needs to be changed.

• **Faculty Association Code:** Select from the list of valid values. Most common values are: ‘REG’ - Full-Time tenure/tenure track faculty; ‘PRN’ or ‘PTF’ - Part-Time tenure/tenure track faculty.

• **Principal Subject Taught (Faculty jobs only):** Select from the list of valid values

• **UBC Chair/Start & End Dates (Faculty jobs only):** Enter any chair information currently held along with start and end dates.

• **Other Employment Details** (appears on Staff Job Openings only): Check off any values as applicable.

• Note that **Account and Compensation** section cannot be altered in the ‘Prepare for Hire’ step. If incorrect, you must submit another offer with the correct funding information and re-obtain approval.

• **Print Appointment Details:** Click on this link to produce an ‘Appointment Information Submission’ report if a paper confirmation is required for your records.
Your ‘Prepare for Hire’ has now been successfully submitted to Payroll. Payroll will review the information submitted, contact you if there are any problems, and transfer the data to HRMS. You will receive a confirmation email from the system confirming that the data has been transferred to HRMS.

Please review the HRMS data after you receive the notification email to ensure all data was transferred correctly.
Once the successful applicant has been transferred to HRMS, the successful applicant’s ‘Disposition’ value will change to ‘Hired’ and unsuccessful applicants’ ‘Disposition’ values will be changed automatically changed to ‘Decline’.

An automated email will be sent to you once Payroll has successfully transferred the successful applicant(s) to HRMS.

**Note:** Applicants changed to ‘Decline’ disposition status will see ‘Position Filled or Cancelled’ in their ‘My Careers’ page.
6
Appendix
6.1 Worklist

Navigation: Worklist > Worklist

The worklist contains transactions that either require your approval or are present for notification purposes. Note that you must only work on or approve transactions wherein you are the Primary Approver or were otherwise notified to work on a transaction.

- **Approver Category:**
  To help identify transactions, you can filter them using the ‘Approver Category’ drop down list.

- **Work Item (Work List Filters):**
  You can also identify transactions by status using the ‘Work List Filters’ drop down list.

- **Priority:**
  You can also set the priority of a transaction but this does not affect how approvals are routed. It is simply a label you can assign to transactions for your own use.
- **Link:**
  Clicking on the hyperlinks under Link will take you to the page where you can approve the transaction.

  **Link**
  
  Position: 00032095 Dept ID: HIST
  Union Cd: BOG

  You may also re-assign an approval by clicking on **Reassign**

  **Enter Lastname, Firstname**

  **Reassign To:**

  **Comment:**

  [OK] [Cancel] [Refresh]

  If you have worked on an item on your worklist but it continues to remain there, click on **Mark Worked** to remove it from your worklist.
6.2 My Workflow Profile

Navigation: **My Workflow Profile**

This page allows you to specify an alternate approver and gives you the ability to update your workflow email address.

- **Alternate Approver Name**: The person who will be approving transactions on your behalf. Click on the magnifying glass icon for a list of valid values. Note that only valid approvers will be shown.
- **From Date (Starting at 12AM)**: Enter the start date when the alternate approver is in effect.
- **To Date (Ending at 11:59PM)**: Enter the end date when the alternate approver is in effect.
- **Email Address**: Enter the email address you wish to receive notifications on.
- **Send me Workflow Email Notifications**: Check this box if you wish to receive emails when a transaction enters your worklist and requires your approval.
6.3 Opening/Viewing Attachments - Troubleshooting FAQs

**Question:** My pop-up blocker is not allowing me to open my Resume or other attachment.

**Answer:** Adjust security settings to allow pop-ups from *.adm.ubc.ca:

**Internet Explorer Settings:**
Adjust settings when the site is blocked by pop-up blocker:

![Internet Explorer Settings](image)

Or adjust security settings directly:

![Internet Options](image)
You can also try adding our system as a ‘Trusted Site’.

Navigate to Tools > Internet Options.
Click on ‘Security’ tab, select ‘Trusted sites’ zone, and then click on ‘Sites’ button:

If you’re already in the Careers site, the website will automatically populate for you. Otherwise, type the website address below manually and then click on the ‘Add’ button:
Firefox Settings:

Adjust settings when the site is blocked by pop-up blocker:

Or adjust security settings directly:
**Question:** When I try to open an attachment using Internet Explorer, a new window appears briefly and then disappears.

**Answer:** Adjust Internet Explorer security to allow downloads.