

How to plan for Preliminary Interviews (conducted over the internet, phone or in-person)

Preliminary Interviews – Shortlist Report:

Include in your search plans a provision for preliminary interviews in the event you need to exercise this practice.

Please follow these steps if your search plan indicates that your department will be conducting preliminary interviews to narrow down the applicants that will be invited for the campus interview.

- (1) Make sure the Conflict of Interest (COI) Disclosure Form for Faculty Recruitments is uploaded in Recruit as required per Academic Advisory AA2015-07.
- (2) All applicants you wish to consider for preliminary/screening interviews should be given the status of “Serious Consideration”. This will show the gender/ethnicity of the serious consideration pool, but not the individual details of the applicants. No one else should be given the status of “Serious Consideration” in these types of recruitments.
- (3) Submit for approval a “Preliminary Pool” by creating a Shortlist Report. Check to make sure the approval routing is setup. For Senate recruitments, the Equity Advisor role is required in the approval routing. Once routing is configured, submit the report for approvals.
- (4) Conduct the preliminary interviews as outlined in the Search Plan.
- (5) When an updated shortlist is formed following the preliminary interviews, all applicants the department wishes to consider for interviews should be given the status of “Recommend for Interview.” This will retain the gender/ethnicity of the serious consideration pool applicants who were not moved on to the second round and create a separate gender/ethnicity pool for the shortlisted applicants. Submit for approval a “Shortlist” by creating a new Shortlist Report. Use the routing within Recruit for this approval.
- (6) Upon approval, invite for an interview those applicants from the shortlist who are approved by the Dean.
- (7) Conduct the campus interviews and update the applicant status to “Interviewed” for those applicants interviewed on campus.
- (8) Assign disposition codes to those who will not be offered the job and change the status to “Proposed Candidate” for the applicant(s) proposed for appointment.
- (9) Submit a Search Report for approval.

What if we want to have three tiers of applicants? How do we proceed with the preliminary interview of the tier 2 to determine the tier 1?

- (1) Make sure the Conflict of Interest (COI) Disclosure Form for Faculty Recruitments is uploaded in Recruit as required per Academic Advisory AA2015-07.
- (2) Leave the “tier 3” applicants with the status of “Complete”. We need to keep them out of the “tier 2/Serious Consideration” pool because they would skew the gender/ethnicity data of the pool.
- (3) When assigning disposition reasons, leave a comment for the “tier 3” applicants without assigning an actual disposition reason. We advise the comment should say something like: “Depending on the outcome of the preliminary interview, this candidate may be reconsidered for the Serious Consideration pool”. (Note: You will need to be sure to go back and select the correct disposition reason later in the search process if these “tier 3” individuals are not advanced to the “serious consideration” status.)
- (4) Give the “tier 2” applicants the status of “Serious Consideration”. This will show the gender/ethnicity of the serious consideration pool, but not the individual details of the applicants. No one else should be given the status of “Serious Consideration” at this time.
- (5) Submit for approval a “Preliminary Pool” by creating a Shortlist Report. Check to make sure the approval routing is setup. For Senate recruitments, the Equity Advisor role is required in the approval routing. Once routing is configured, submit the report for approvals.
- (6) Conduct the preliminary interviews as outlined in the Search Plan.*
- (7) When the shortlist is formed following the preliminary interviews, all applicants the department wishes to consider for interviews should be given the status of “Recommend for Interview”. This will retain the gender/ethnicity of the serious consideration pool applicants who were not moved on to the second round

and create a separate gender/ethnicity pool for the shortlisted applicants. Submit for approval a "Shortlist" by creating a new Shortlist Report. Use the routing within Recruit for this approval.

- (8) Upon approval, invite for an interview those applicants from the shortlist who are approved by the Dean.
- (9) Conduct the campus interviews and update the applicant status to "Interviewed" for those applicants interviewed on campus.
- (10) Assign disposition codes to those they will not offer the job and change the status to "Proposed Candidate" for the applicant(s) proposed for appointment.
- (11) Submit a Search Report for approval.

*If after Step 6, the department needs to invite some/all of the "tier 3" applicants for Skype interviews, return to Step 3 and give those "tier 3" applicant(s) the status of "Serious Consideration" and submit another Shortlist Report for approval.