UBC eRecruit
Managing Openings & Applicants
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.)
- Manually add applicants
- Shortlist applicants
- Decline applicants
- 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
Manually Add Applicants

Manually linking applicants to job openings may be required for recall candidates, applicants who do not have access to a PC and have submitted paper applications or a preferred candidate being hired into a posting with an internal rider.

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.

Click here
Manually Add Applicants

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.
Manually Add Applicants

Enter the reason (optional) for manually adding the applicant and then click on the Submit button.

**Link to Job Opening**

Enter Disposition Information

<table>
<thead>
<tr>
<th>Status Code:</th>
<th>Linked</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status Reason:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Status Date:</strong></td>
<td></td>
</tr>
<tr>
<td>Bypass to Hire</td>
<td></td>
</tr>
<tr>
<td>Duty to Accommodate Candidate</td>
<td></td>
</tr>
</tbody>
</table>

Enter Job Opening

<table>
<thead>
<tr>
<th>Job Opening ID</th>
<th>5157</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>Paper Application Submitted</td>
</tr>
<tr>
<td>Recall/Placement Candidate</td>
<td></td>
</tr>
<tr>
<td>Administrative Support (581)</td>
<td></td>
</tr>
</tbody>
</table>

Submit  Cancel

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.

**Manage Applicant: John Doe**

Applicant Activity

You have successfully linked Applicant(s) to Job Opening.

Name: John Doe
Applicant ID: 3205
Contact: None
Phone: 555/555-5555
Email: john.smith@hotmail.com
Address: 1234 Main Street
Vancouver BC V6T 9B3

Applicant Activity: [Applicant Notes] [Applicant Data] [Interview Schedule]

Current Status

<table>
<thead>
<tr>
<th>Applicant Activity</th>
<th>Disposition</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Assistant - 5032</td>
<td>015 Linked</td>
<td>2009/02/28 3:39PM</td>
</tr>
</tbody>
</table>

Return to Applicant List
Applicant Priority Assignment

The system assigns applicant priority numbers based on the employment group of the job opening. Applicant prioritization is completed when job postings close. Prioritization for CUPE 116, CUPE 2950 and BCGEU-UBCO job postings are reviewed and finalized by central Human Resources as postings close.

Rule of Thumb

- Applicants with the lowest priority numbers have highest priority
- Non-unionized postings, all priority numbers = 99 (no priority)

Note: Duty to Accommodate applicants always have #1 priority for all job postings except Faculty jobs.

Central Human Resources is responsible for reviewing and releasing applicants against job postings for CUPE 116, CUPE 2950 and BCGEU-UBCO positions. This is to ensure that prioritization numbers are set correctly and that all recall/placement/duty to accommodate applicants are appropriately dealt with.

Priority Number Assignment

### CUPE 2950 Postings

<table>
<thead>
<tr>
<th>Priority #</th>
<th>Priority Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Internal Applicants - Duty to Accommodate</td>
</tr>
<tr>
<td>2</td>
<td>Internal Applicants - Placements &amp; Recalls</td>
</tr>
<tr>
<td>3</td>
<td>Internal Applicants - Active CUPE 2950</td>
</tr>
<tr>
<td>4</td>
<td>Internal Applicants – Non CUPE 2950</td>
</tr>
<tr>
<td>5</td>
<td>External Applicants &amp; Former Employees</td>
</tr>
</tbody>
</table>

### CUPE 116/IUOE Postings

<table>
<thead>
<tr>
<th>Priority #</th>
<th>Priority Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Internal Applicants - Duty to Accommodate</td>
</tr>
<tr>
<td>2</td>
<td>Internal Applicants – Active CUPE 116, IUOE – Union Code, Department Code same as posting</td>
</tr>
<tr>
<td>3</td>
<td>Internal Applicants - Active CUPE 116, IUOE – Union Code same as posting, Department Code and Job Code different than posting</td>
</tr>
<tr>
<td>4</td>
<td>Internal Applicants – Non CUPE 116, IUOE</td>
</tr>
<tr>
<td>5</td>
<td>External Applicants &amp; Former Employees</td>
</tr>
</tbody>
</table>

### BCGEU-UBCO Postings

<table>
<thead>
<tr>
<th>Priority #</th>
<th>Priority Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Internal Applicants - Duty to Accommodate</td>
</tr>
<tr>
<td>2</td>
<td>Internal Applicants – Active BCGEU-UBCO</td>
</tr>
<tr>
<td>3</td>
<td>Internal Applicants – Non BCGEU-UBCO</td>
</tr>
<tr>
<td>5</td>
<td>External Applicants &amp; Former Employees</td>
</tr>
</tbody>
</table>

### All Other Postings

<table>
<thead>
<tr>
<th>Priority #</th>
<th>Priority Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Internal Applicants - Duty to Accommodate</td>
</tr>
<tr>
<td>99</td>
<td>All other applicants</td>
</tr>
</tbody>
</table>
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.
Question: My pop-up blocker is not allowing me to open Resume/CVs.
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:

Or adjust security settings directly:
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 Faculty/Staff Self Service, 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:
Opening/Viewing Attachments - Troubleshooting FAQs

**Question:** When I try to open the Resume/CV using Internet Explorer, a new window appears briefly and then disappears.

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

**Question:** I can't open Microsoft Word files. I have Microsoft Word 2000/2002/2003 installed on my PC.

**Answer:** Download converter from Microsoft which converts newer versions of Word files (.docx) to the version installed on your PC:

*Download Microsoft Office Compatibility Pack*

**Question:** I can't open Microsoft Word files. I don't have Word installed.

**Answer:** Download Word Viewer:

*Download Microsoft Word Viewer*

**Question:** I can't open Adobe Acrobat files (.pdf).

**Answer:** Download Adobe Reader:

*Download Adobe Reader*
**Question:** When I attempt to open an applicant's Resume/CV, I'm getting the file download box below, asking me if I want to open or save a '.zip' file.

**Answer:** The applicant has uploaded a '.docx' file (Word 2007 or higher file) which some computers will convert to a zipped file format (.zip). We're still working on a more permanent solution for this problem but in the interim, you can save the .zip file and then change the filename extension to .docx. You'll then be able to open the renamed document in Word.

**Question:** I've tried everything you've suggested and still am having problems opening Resume/CV attachments. What now?

**Answer:** Contact your departmental computer support person. Demonstrate to them what you're trying to do and what settings you've changed on your computer. They should be able to determine why your computer is having difficulty opening attachments.
Reviewing Applicants – Interview Team

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 continue to be accessible to the interview team until the job opening is filled/closed.

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

**Navigation:** Faculty and Staff Self Service>myRecruitment>Review applications

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**Review Applicants**

<table>
<thead>
<tr>
<th>Applications</th>
<th>Job Opening</th>
<th>Posting Title</th>
<th>Applicant Name</th>
<th>View Application/Resume</th>
<th>Priority</th>
<th>Current Relationship with UBC</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5126</td>
<td>Office Manager</td>
<td>Hill, Thomas</td>
<td>View Application</td>
<td>99</td>
<td>Former Employee</td>
</tr>
<tr>
<td></td>
<td>5126</td>
<td>Office Manager</td>
<td>Smith, Stuart</td>
<td>View Application</td>
<td>99</td>
<td>CUPE 2650 Employee - Available - Notice</td>
</tr>
<tr>
<td></td>
<td>5108</td>
<td>Financial Proc. Spec 3 (Gr5)</td>
<td>Smith, Jane</td>
<td>View Application</td>
<td>4</td>
<td>Current M&amp;F (AAPS)</td>
</tr>
<tr>
<td></td>
<td>5107</td>
<td>Financial Clerk</td>
<td>Lam, Janet</td>
<td>View Application</td>
<td>2</td>
<td>Current Faculty NFA</td>
</tr>
<tr>
<td></td>
<td>5107</td>
<td>Financial Clerk</td>
<td>Reddy, Angappa</td>
<td>View Application</td>
<td></td>
<td>CUPE 2650 Employee - Available - Notice</td>
</tr>
<tr>
<td></td>
<td>5094</td>
<td>Assoc Professor (gmt ten-trk)</td>
<td>Williams, Roger Hamilton</td>
<td>View Application</td>
<td>99</td>
<td>Current Faculty NFA</td>
</tr>
<tr>
<td></td>
<td>5078</td>
<td>Human Resources and Training Manager</td>
<td>External, Joe</td>
<td>View Application</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5058</td>
<td>Staff Physician</td>
<td>Smith, John M</td>
<td>View Application</td>
<td>99</td>
<td>Current M&amp;F (AAPS)</td>
</tr>
<tr>
<td></td>
<td>5053</td>
<td>Human Resources and Training Manager</td>
<td>Johnstone, William J</td>
<td>View Application</td>
<td>99</td>
<td>CUPE 2650</td>
</tr>
<tr>
<td></td>
<td>5053</td>
<td>Human Resources and Training Manager</td>
<td>Cui, Stephanie Zheng</td>
<td>View Application</td>
<td>99</td>
<td>CUPE 2650 - Notice</td>
</tr>
<tr>
<td></td>
<td>5057</td>
<td>Jack of all Trades</td>
<td>Cui, Stephanie Zheng</td>
<td>View Application</td>
<td>3</td>
<td>CUPE 2650 - Recall</td>
</tr>
<tr>
<td></td>
<td>5057</td>
<td>Jack of all Trades</td>
<td>Reddy, Angappa</td>
<td>View Application</td>
<td>2</td>
<td>CUPE 2650 - Recall</td>
</tr>
<tr>
<td></td>
<td>5057</td>
<td>Jack of all Trades</td>
<td>Jones, Carole</td>
<td>View Application</td>
<td>1</td>
<td>CUPE 2650 - Duly to Accommodate</td>
</tr>
</tbody>
</table>

Refer to pages 84-87, ‘Opening/Viewing Attachments - Troubleshooting FAQs’ if interview team members have difficulty opening resume/CV attachments.
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.
Disposition values update to ‘Short List’ for applicants selected. These applicants will be accessible by your interview team.

**Important Note:**
Applicant Disposition Statuses (ie, applied, shortlist, decline) are visible to the applicant in their ‘myCareer’ home page. You may want to advise the applicant verbally of your decision before updating their Disposition status on the system.
Similar to shortlisting, you can manage interviews for individual or multiple applicants.
Schedule Interviews and Review Interview Schedule

Job Opening
Interview Schedule

Listed below are the interview schedules for the applicant(s) selected. Create a new interview schedule or update an existing schedule. Click on Delete icon to remove corresponding interviewers. Use the Add Interviewer hyperlink to add interviewers not defined within the Job Opening.

Posting Title: Administrative Support 1 (Gr1)
Job Opening ID: 5157
Job Opening Status: Open
Classification Title: Administrative Support 1 (Gr1)
Job Code: 285201
Business Unit: UBC01 UBC - Vancouver
Closing Date: 2009/03/05
Employment Group: CUPE 2950 (35 hrs/wk)
FTE: 1.00000
Department: WXYZ Recruiting Training Dept.
Job Family: ADMX29 CUPE 2950 Administrative Suppt
Job Description #: 00000251

Carole Jones

Applicant Name: Carole Jones
ID: 3654
Notify Interview Team
Notify Applicant

Interview Schedule

<table>
<thead>
<tr>
<th>Interviewer ID</th>
<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>1261592</td>
<td>M Mouse</td>
<td>2009/03/15</td>
<td>Campus</td>
<td>9:00AM</td>
<td>10:00AM</td>
<td>GENERAL</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.
Schedule Interviews and Review Interview Schedule

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

Important Note:
Applicant Disposition Statuses (ie, applied, shortlist, decline) are visible to the applicant in their 'myCareer' home page. You may want to advise the applicant verbally of your decision before updating their Disposition status on the system.

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.
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.

Interview Team Schedule

Listed below are the Job Opening details and corresponding interview schedule. Click View Schedule to see a list of applicants scheduled to be interviewed for the selected Job Opening.

<table>
<thead>
<tr>
<th>Team Schedule</th>
<th>Posting Title</th>
<th>Department Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>5157</td>
<td>Administrative Support 1 (Gr1)</td>
<td>Recruiting Training Dept</td>
<td>Review</td>
</tr>
</tbody>
</table>

Click here to view schedule
### Interview Schedule

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

**Job ID:** 5157  
**Location:** Vancouver - Point Grey Campus  
**Classification Title:** Administrative Support 1 (Gr1)  
**Employment Group:** CUPE 2950 (35 hrs/wk)  
**Business title:** Administrative Support 1 (Gr1)  
**Job Family:** CUPE 2950 Administrative Suppt  
**Department:** eRecruiting Training Dept.  
**Hiring Range:** $29,472.00 - $33,504.00  
**Full/Part Time:** Full-Time  
**FTE:** 1.000000  
**Desired Start Date:** 01/04/2009  
**Level:**  
**Ongoing:** Yes  
**Job End Date:**  
**Possibility of Extension:** No  
**Funding Type:** Budget Funded  
**Other:**  
**Remove Date:** 05/03/2009  
**Available Openings:** 1

#### Carola Jones

**Applicant Name:** Carola Jones  
**ID:** 3654

<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 McDonald

**Applicant Name:** Karen McDonald  
**ID:** 3556

<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:** 3557

<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>
Similar to shortlisting and managing interviews, you can decline individual or multiple applicants.
Decline Applicants

Enter a reason applicant was declined (optional).

Important Note:
Applicant Disposition Statuses (ie, applied, decline, position filled) are visible to the applicant in their 'myCareer' home page. Applicant Disposition Status 'shortlist' is not visible to applicants (disposition will continue to read 'applied' to applicant).
You may want to advise the applicant verbally of your decision before updating their Disposition status on the system.
Similar to shortlisting, managing interviews and declining applicants, you can email individual or multiple applicants.

**Email Applicants**

Email Individual Applicant

Email Multiple Applicants
System uses your 'Primary' email stored in Faculty/Staff Service.

If an incorrect email appears (or none at all), you must update your email address information in Faculty/Staff Self Service, before proceeding with email to applicants.
Once the interview process is over, you are now 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’.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Applicant Name</th>
<th>ID</th>
<th>Current Relationship with UBC</th>
<th>Disposition</th>
<th>Resume Last Updated</th>
<th>Take Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Carole Jones</td>
<td>3654</td>
<td>CUPE 2950 - Duty to Accommodate</td>
<td>Interview</td>
<td>2009/02/25 1:29PM</td>
<td>Select Action...</td>
</tr>
<tr>
<td>2</td>
<td>Linda Fung</td>
<td>3657</td>
<td>Current CUPE 2950 Employee</td>
<td>Interview</td>
<td>2009/02/25 1:29PM</td>
<td>Select Action...</td>
</tr>
<tr>
<td>3</td>
<td>Catharine Anderson</td>
<td>3244</td>
<td>Current ExecAdmin</td>
<td>Interview</td>
<td>2009/02/25 1:29PM</td>
<td>Select Action...</td>
</tr>
<tr>
<td>4</td>
<td>John Smith</td>
<td>3638</td>
<td>External Applicant</td>
<td>Decline</td>
<td>2009/02/25 4:53PM</td>
<td>Select Action...</td>
</tr>
<tr>
<td>5</td>
<td>Karen MacDonald</td>
<td>3656</td>
<td>External Applicant</td>
<td>Interview</td>
<td>2009/02/25 1:29PM</td>
<td>Select Action...</td>
</tr>
</tbody>
</table>
Make an Offer – Staff Positions

complete all required fields in Prepare Job Offer page and click on the Submit button:

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**Prepare Job Offer**

**Applicant Name:** Carole Jones  
**Date Entered:** 2/3/02

**Posting Title:** Administrative Support 1 (GR1)  
**Job Opening:** 5157  
**Job Opening Status:** Open  
**Employment Group:** CUPE 2050 (35 hour/week)  
**Business Title:** Administrative Support 1 (GR1)  
**Department:** Affirmative Training Dept.  
**Hiring Range:** $22,472.00 - $33,054.00  
**Full Time:** Yes  
**Desired Start Date:** 2/20/02  
**Level:** Full Time  
**Engaging:** Yes  
**Job End Date:**  
**Possibility of Extension:** No  
**Funding Type:** Budget Funded  
**Vacancy Date:** 2/20/04  
**Available Openings:** 1  

**Salary Range:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Hourly</th>
<th>Monthly</th>
<th>Annual</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>18,150.00</td>
<td>235,600.00</td>
<td>294,720.00</td>
</tr>
<tr>
<td>2</td>
<td>18,140.00</td>
<td>235,500.00</td>
<td>294,700.00</td>
</tr>
<tr>
<td>3</td>
<td>18,370.00</td>
<td>243,400.00</td>
<td>303,500.00</td>
</tr>
</tbody>
</table>

**Hiring Package**

**Total Offer Amount:** 2792,000.00

**In this Job offer an extension of a current term position?**

**Special Considerations?**

**Foreign Worker?** Not Applicable

**Leave:**

**Vacation:** 20  
**Sick Leave:** 10

**Gererate Offer Letter**

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Prior to submitting your offer for approval, you may be required to provide your approval with additional supporting documentation (i.e. Work Permit for foreign worker, copy of IR card, Funding Transfer Form, etc.)

In order to do this, click on “Save for Later” below and then “Return to Previous Page” in order to return to the main Manage Applicant page. Select “Submit Document” in the “File Action” drop down menu. Once done, select the “Save Offer” designation for your applicant to reaccess this page.

Click on the “Edit Offer” button to modify or finalize offer details and submit for approval.
Ensure you enter all fields in sequence, as they appear on the page in order to avoid invalid error messages.

The **Total Offer Amount** should reflect the total hourly or monthly base compensation amount. This would include things such as shift differentials, earnings above the maximum base rate, administrative stipends, industrial first aid certificates, etc. However, ensure to separate out different types of earnings in the **Account and Compensation** section (ie, REG=$3000, ALT=$210).

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

Ensure to indicate if the offer is a result of a position being extended in order to ensure the correct offer letter is generated.

**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.

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. This system cannot accommodate funding changes for different periods of time. If the funding information provided is invalid (ie, PG has an end date in the past), a valid PG must be provided in the Offer page and can be followed up with a paper appointment form to Payroll to modify the account codes.

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

You may want to provide your approver with further documentation on your applicant, such as the offer letter, immigration documentation for foreign workers, copy of Social Insurance Card, etc. All these types of documents can be uploaded (scanned copies) and reviewed by your approver (see: **Manage and View Applicant Attachments** chapter). Ensure that any documentation you want available to your approver is uploaded prior to submitting your offer.
Make an Offer – Staff Positions

After job offer submitted, an ‘Approvals’ page appears indicating who the job offer was routed to for approval.

Note: All CUPE 2950 offers made to internal UBC applicants have an additional workflow approval step to Human Resources.
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’.

<table>
<thead>
<tr>
<th>Applicant Name</th>
<th>Disposition</th>
<th>Last Updated</th>
<th>Take Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steven Brown</td>
<td>Interview</td>
<td>2009/02/26 5:53PM</td>
<td>4-Prepare Job Offer</td>
</tr>
</tbody>
</table>

Select '4-Prepare Job Offer' for appropriate applicant.
Complete all required fields in Prepare Job Offer page and click on the Submit 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 Job Description entry used to create the Job Opening.

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), billed appointment earnings (BAP) 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.

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 Social Insurance Card, 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.
Make an Offer – Faculty Positions

After job offer 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:

![UBC-V Faculty Job Offer example]

UBC-O Faculty Job Offer example:

![UBC-O Faculty Job Offer example]
All job offers require approval from the person you designated in the Job Description associated with your Job Opening. In the case of Faculty, this approval must come from the Dean’s office. Ensure all data entered is accurate and final prior to submitting as submissions cannot be retracted prior to them being routed to your approver.

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 approval has been approved by the Dean’s office and has been routed to Human Resources (UBC-O) for approval:

![Image of job offer 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.

Select ‘Pre-Hire Checklist’ for prospective 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 button to add or delete checklist items.
Use the 'Pre-Hire Documents' page to upload documents required for the Job Offer/Hire.
Manage and View Applicant Attachments

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.
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).
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. 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.
- **Start Date:** override value if it has changed.
- **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 Applicant for Hire

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 throughout all previous recruiting steps. 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.

### Early Assignment of HRMS Employee ID

Please provide the SIN number of your new hire. This will be used to search the HRMS database to determine if this person has previously been hired at UBC. If so, you must use the same employee ID number on your Appointment Form and in any communication with your new hire.

If you don’t know the SIN number but know the person’s birthdate, leave the SIN blank and press the Search button to search by birth date.

| 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.

#### The system could not find the SIN number you provided. Here are your options:

1. Sometimes, people new to Canada are assigned a temporary SIN number. If your new hire previously worked at UBC and provided us with their temporary SIN number, then we won’t be able to locate them with their permanent SIN number. If you think this may be the case, please ask your new hire if they were ever assigned a temporary SIN number and re-do the search with this number.

2. Use the birthdate search facility below to see if you can locate your new hire. If you cannot find them by SIN or birth date, then it’s likely they have not previously worked at UBC.

| Birthdate: | 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 Employee ID 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**
Prepare Applicant 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 two required fields left on this page should be 'Birth Country' and '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 Action Reason = 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.

Employee Class (Staff jobs only): Click on 'Override' button if value needs to be changed.

Faculty Association Code (Faculty jobs only): 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

Previous Years in Rank (Faculty jobs only): Enter number of years in rank at a previous institution, if any; download ‘Previous Years in Rank’ form and forward to Faculty Relations.

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

Other Employment Details: 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 (still in development as of March 1/09), 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.
Prepare Applicant for Hire

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 automatically changed to ‘Decline’.

An automated email will be sent to you once Payroll has successfully transferred the applicant into HRMS.

**Important Note:**
Applicant Disposition Statuses (ie, applied, decline, position filled) are visible to the applicant in their ‘myCareer’ home page. You may want to advise the applicant verbally of your decision before updating their Disposition status on the system.