

# HIRING PROCESS CHECKLIST

(Refer to *The Hiring Process – A Guide for the Hiring Manager* for complete details on each of the steps below.)

Position: \_\_\_\_\_

## I. PREPARING TO HIRE

Yes No or N/A

- A. Prepare a new or updated [Position Description](#) .....   
*The PD serves as the basis for the posting, the Hiring Matrix, and any advertisements. It must be current.*
- B. Post the position on the [HSC jobsite](#) .....   
• *Level 1- enter data exactly as it appears on the PD, then submit to Level 2 (BCD ONLY – Level 1 will submit to Budgets, and Budgets will submit to Level 2).*  
• *Level 2 – compare PD and posting to make sure they match, then attach PD and submit to HR. If the posting is for a new or reclassified position, a copy of the approved Position Request form showing the HR Tracking Number must also be attached.*
- C. Prepare and place media advertisement(s) .....  .....   
*Newspaper or periodical employment advertisements do not have to contain all the detail of the posting. Instead, the advertisement must direct applicants to the [Jobsite](#) for complete details and to submit an application. **Hiring departments may not consider applications received from sources other than the Jobsite.***

## II. SCREENING CANDIDATES, PREPARING TO INTERVIEW

- A. Review diversity of the applicant pool .....   
*You may view the gender and race, but not individual names, of your applicant pool. When you are satisfied, proceed to step B.*
- B. Place position ‘On Hold’ .....   
*Send email to [employment@tamhsc.edu](mailto:employment@tamhsc.edu) to stop the flow of new applicants. **Do not start interviewing until the position is placed on hold.** Email [employment@tamhsc.edu](mailto:employment@tamhsc.edu) again if you find it necessary to reopen the position to receive more applications.*
- C. Complete the required and preferred qualifications sections of the [Hiring Matrix](#) .....   
*Before reviewing any applications, enter required and preferred qualifications as shown on the position description. Required qualifications should be weighted 5 (the highest rating). Preferred qualifications, as well as the interview and reference checks, may be weighted from 1 to 5. Rate each applicant’s qualifications. Only applicants who state they meet the minimum qualifications are referred for review. If you find an applicant who does not meet minimum requirements, place an ‘X’ in the score box to reset that application’s score to zero. Only applicants with the highest scores should be interviewed.*
- D. Prepare your interview .....   
*Using the [sample interview questions](#) found on the HSC Forms website, preplan your interview by using the [Interview Record form](#). Prepare a listing of “core” job-related questions you’ll ask **every** interviewed applicant. Enter interview score on the Hiring Matrix.*
- E. Print the application(s) of the interviewees, ask applicant(s) to sign during interview .....

## III. FINALIZING THE HIRE

- A. Make an initial selection .....   
*Hiring managers are required to hire the applicant who best meets the needs of the position. A properly-completed Hiring Matrix will help determine the successful applicant.*
- B. Conduct the Reference checks .....   
*At least two telephone references are recommended for the applicant selected. Document the check using the [reference check](#) form, then place a rating on the Hiring Matrix. If a reference check is so negative that it warrants not hiring an applicant, place an ‘X’ in the reference score. If applicable, educational credentials should also be verified at this time using a [release](#) and [sample letter](#).*
- C. Extend verbal offer and prepare offer letter (sample letters are on the HR Forms page) .....   
*The hiring department may notify the selected applicant verbally, but applicant should also receive an official written offer.*
- D. Ensure completion of [Background Check Authorization form](#) and [Selective Service Registration Status](#) form .....   
*All finalists must complete the background check form, but only males are required to complete the Selective Service form. Submit completed forms via Laserfiche to HR 9.0 Inbox.*

## IV. CLOSING PROCESS

- A. Change statuses on HSC Jobsite .....   
*Change application status of all candidates*
- B. Request a Hiring Certificate .....   
*Using the “Request for Hiring Certificate” tab in the online jobsite system*
- C. Print Hiring Manager Report(s) (these will be placed in the Position File later) .....   
*Reports that should be printed are “EEO Summary” and “Interviewed Applicants”*
- D. Assemble the Position File using the [Position File Checklist](#) .....   
*Scan Position File into the HR Inbox (9.0) in the DMS. Hiring Certificate will not be issued until the entire position file is received.*
- E. Mark your calendar to conduct [New Employee Review](#) before end of 4<sup>th</sup> month .....  .....   
*Recommended, but not required.*
- F. Complete the [New Employee Processing Checklist](#) (or New Faculty/New Student Guide, as appropriate) .....   
*Use of this checklist will ensure that all necessary paperwork is completed and distributed as necessary to secure a hiring certificate and new email address and to place the new employee on payroll.*

Checklist completed by: \_\_\_\_\_

Signature



TEXAS A&M

## HEALTH SCIENCE CENTER

# The Hiring Process A Guide for the Hiring Manager

This document is provided to assist hiring managers through the hiring process using the [Health Science Center Jobsite](#). An abbreviated version of this guide ([Hiring Process Checklist](#)) is available on the HSC website.

All documentation used during the hiring process must be retained in a Position File for two years from the hire date (see [Position File Checklist](#) for additional information).

HR staff is available to answer your questions at any time during the process.

Carl McLin	979-458-7280	<a href="mailto:mclin@tamhsc.edu">mclin@tamhsc.edu</a>	All HSC Units
Valerie Townsend	979-458-7268	<a href="mailto:townsend@tamhsc.edu">townsend@tamhsc.edu</a>	All HSC Units
Pat Lopez	214-828-8962	<a href="mailto:plopez@bcd.tamhsc.edu">plopez@bcd.tamhsc.edu</a>	Baylor College of Dentistry, Dallas
Diana Taylor	713-677-7734	<a href="mailto:dtaylor@ibt.tamhsc.edu">dtaylor@ibt.tamhsc.edu</a>	HSC Units located in Houston (Alkek)
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### I. **Preparing to hire (an existing or preapproved position)**

#### A. **Prepare the Position Description.**

Update the PD if necessary, since the position description serves as the basis for everything to follow.

#### B. **Post the position on the HSC jobsite.**

After training, and user account approval, the departmental coordinator/HR Liaison will login to the [HSC Jobsite](#) to enter and submit the job posting to the appropriate HR staff at each component (at BCD, the posting will be routed to Budgets initially, then to BCD-HR staff). See posting instruction for procedures on how to post.

\* When the posting appears on the jobsite, all users with access to that posting will receive a confirmation email. A sample copy of that notification is attached to this guide.

#### C. **Prepare and place media advertisements.**

If you plan to place additional advertising with web sites, journals, etc., you must refer all applicants to the Jobsite (<http://jobs.tamhsc.edu>) for the full job description and to apply online. This will ensure that you meet all the federal, state and System legal requirements for postings. ***You may not consider applications received from sources other than the Jobsite.***

### II. **Screening Candidates and Preparing to Interview**

#### A. **Review the diversity of your applicant pool.**

Texas A&M Health Science Center is committed to building a diverse workforce. You can view the gender/race of your applicant pool, without seeing individual applicant names, by logging onto the HSC Job Site.

- Click on 'Get Reports List' located under the NOV number on your active posting list
- Select 'EEO Summary'
- Click on 'Generate Reports'
- View/Print Hiring Manager EEO Report showing the race/gender of the applicant pool as reported on the voluntary EEO section of the candidates' applications.

Suggestions for building a diverse pool of applicants can be found online at <http://employees.tamu.edu/docs/employment/hiring/415AddDiversity.pdf>. Contact HR if you have

concerns about the diversity of your applicant pool or you would like assistance in identifying additional recruiting sources.

**B. Place position ‘On Hold’.**

When you decide the applicant pool is sufficient and would like to begin interviewing, send a request to [employment@tamhsc.edu](mailto:employment@tamhsc.edu) to place NOV 2010XXX on hold. This will remove the posting from public view and thereby stop the flow of new applicants. Keep in mind that each position must be posted for a minimum of five working days, and that postings may be placed on hold and re-opened as often as necessary.

\*Once the job is placed on hold all users with access will receive an email. A sample copy of that notification is attached to this guide.

**C. Complete the Hiring Matrix.**

Before reviewing any applications, rank the applicants using the [Hiring Matrix](#). Use of the Hiring Matrix encourages objectivity by providing a numerical way to evaluate application materials. It also provides an effective way to determine which candidates to interview. Only applicants with the highest scores should be interviewed.

The Hiring Matrix must be customized for every position.

Before reviewing any applications,

- Enter NOV (Notice of Vacancy) number, position title and evaluator’s name on the form.
- Enter the required and preferred qualifications as shown on the position description.
- Required factors are given a weight of 5 (the highest rating). Preferred qualifications, and the interview and reference checks, may be weighted from 1 to 5 depending upon the importance you assign to each of these factors.

Now you’re ready to review the applications. As you enter your rankings, each applicant’s total score will be calculated. If you find an applicant who does not meet minimum requirements, place an ‘X’ in the score box — the application score will reset to zero. All factors should be assigned a score from 1 (lowest) to 5 (highest).

Contact HR if you have any questions regarding the requirements used to rank applicants.

**D. Prepare your interview.**

Review the [sample interview questions](#) on the HR forms website. Preplan your interview by using the [Interview Record](#) or similar document. Prepare a list of 4-5 “core” job-related questions that you’ll ask of every interviewed candidate. Although you must ask every candidate the same core questions, you are free to ask more specific and varied questions based on a particular candidate’s responses, or to clarify relevant work experience and education. Just keep in mind that all questions must be job-related and non-discriminatory, and that the core questions must be documented.

**E. Print the application(s) of the candidates being interviewed.**

During the interview, ask the applicant to sign his or her application. By signing the application, the applicant gives you permission to contact any person associated with their previous employment. Immediately after the interview, complete the Interview Record and assign a score from 1 (lowest) to 5 (highest) to represent how well each applicant answered each interview question. These points will be added to the Hiring Matrix.

### ***III. Finalizing the Hire***

**A. Make an initial selection.**

Hiring managers are required to hire the applicant who best meets the needs of the particular position. A properly completed Hiring Matrix will help determine the successful applicant.

**B. Conduct the Reference Check(s) on the finalist (the applicant with the highest score after the interviews).**

At least one reference check is required for each applicant selected; two reference checks are recommended.

- If the hiring manager is personally aware of the quality of a finalists work, he or she may place a note to that affect in the file. This will substitute for a reference check.
- Reference checks must be documented in writing. The [Reference Check form](#) available on the HR forms website may be used for this purpose. Always ask the same questions for every reference check.
- If a reference check is so negative that it warrants not hiring an applicant, place an 'X' in the reference score. That applicant's total score will be reset to zero.
- Indicate the reference check score on the Hiring Matrix.
- If applicable, educational credentials should also be verified at this time using a [release](#) and [sample letter](#) or similar documents. These forms are available on the [HR Forms page](#).

### C. **Extend Verbal Offer, and Prepare Offer Letter.**

A verbal contingent offer should be made to the selected applicant, but the applicant must also receive an official written offer confirming the salary, job title, supervisor's name, and start date. The sample offer letters available on the HR Forms site contain all required language and departments are strongly encouraged to use these formats exactly. The selected applicant may be directed to the HR Forms Page in order to complete the [Background Authorization and Disclosure Form](#) and, if male, the [Selective Service Registration Status](#) form, or you may include both forms with the offer letter.

When extending a verbal offer, advise the candidate that:

- The position is considered security sensitive and the person chosen to fill the position must undergo a criminal history record check. If s/he wishes to accept the position, s/he must complete the [Background Authorization and Disclosure Form](#).
- Male candidates must also complete a [Selective Service Registration Status](#) form.
- If a criminal history check reveals information that was not on the employment application, s/he will be informed and given an opportunity to correct or challenge the information, and
- Evidence of criminal history may be grounds for withdrawing the offer.

As stated above, these forms may be attached to the offer letter, or the candidate can download the forms from the HR forms, and then return them to the hiring department.

### D. **Submit the completed [Background Authorization and Disclosure Form](#) and [Selective Service Registration Status](#) form (if applicant is male) via Laserfiche.**

After ensuring the applicant's portion is readable and completing the department's portion of the background check form, scan both documents to the HR Inbox (9.0) in the DMS (name the background check form as "BC-last name, first name", and the Selective Service form as "SSR-last name, first name"). HR will conduct the background check and confirm the results to the hiring department or appropriate HR staff. Keep a copy of the Selective Service form for the employee's personnel file.

## IV. **The Closing Process**

### A. **Change all applicant statuses on the [HSC Jobsite](#).**

1. First, identify each applicant who was interviewed, and change his or her status to 'Interviewed.'
2. Next, change the status of the successful candidate from 'Interviewed' to 'Offered Position.'
3. The status of the other interviewed candidate(s) can now be changed from 'Interviewed' to 'No longer under consideration.' Select a reason from the drop-down box provided. Some departments prefer to send their own communications to the interviewed candidates. If so, select 'No longer under consideration. Do not send email.'
4. Finally, change the status of all other candidates to 'No longer under consideration (send e-mail)' or 'No longer under consideration (do not send e-mail)' and indicate a reason from the drop-down box provided. **These reasons should reflect the scoring already noted on your hiring matrix or other evaluation materials.** By choosing option with '(send e-mail)' all candidates not selected will receive a system generated e-mail from HR. An example of this email is shown at the end of this guide. If the department wishes to send out their own notifications to the unsuccessful candidates, choose the option '(do not send e-mail).' Contact HR for further clarification.

**B. Request the Hiring Certificate.**

1. After changing all statuses, click on tab labeled "Request for Hiring Certificate."
2. Select 'continue to next page.'
3. Select 'View Posting Summary.'
4. Select 'Submit to Level 2 for Hiring Certificate' (or appropriate Level).
5. Click 'Save' and 'Confirm.'

**C. Print Hiring Manger Reports.**

These will be placed in the Position File.

1. Under Active Postings, click 'Get Reports List,' located under NOV number.
2. Select 'Interviewed Applicants.'
3. Select 'Generate Report' and print.
4. Select 'EEO Summary.'

**D. Assemble and Submit the Position File via Laserfiche to the HR 9.0 inbox.**

HR cannot issue the hiring certificate until confirming that all applicant statuses have been changed and that the entire Position File is received and accurate. *This request MUST be made on or before the candidate's start date.*

Position Files are required only for those positions which were posted on the HSC Jobsite. Every Position File must contain the documents listed below:

1. Signed [Position File Checklist](#)
2. Copy of the Position Description (signed or unsigned).
3. Copy of the job posting
4. Copy of any additional advertisements
5. Copy of the Offer letter, signed or unsigned.
6. Copy of all other correspondence with any of the applicants.
7. Hiring manager reports (See IV.C above).
8. Interview Record form documenting both the questions and the responses of all the applicants who were interviewed.
9. Hiring Matrix used to rank all applicants.
10. Questions asked on all the reference checks, and the responses you received on each.
11. Any additional information pertaining to the hiring process.

**E. Mark your calendar with a reminder to evaluate the performance of your new employee using the [New Employee Review form](#).**

This is not a requirement, but supervisors are encouraged to evaluate the performance of new employees during the first few months of employment in order to provide feedback to the new employee.

**F. Complete New Employee Processing Checklist** (or New Faculty Processing or New Student Processing, as appropriate).

Use of this checklist will ensure that all necessary paperwork is completed and distributed as necessary to place the new employee on payroll. Additionally, it will serve as a reminder to secure an email address.

**EXAMPLE EMAILS:**

**A. Job Posted**

When a job is posted the following email will be sent to all users that have access to that posting:

Notice of Vacancy Number (NOV): 200XXXX

Position Title: [JOB TITLE]

Human Resource has opened your job posting. If you haven't already, please begin preparing a hiring matrix (refer to Section IIB of the Hiring Process Guide). Applicants may view your posting online at <http://jobs.tamhsc.edu>.

To view your posting, applications, and other information related to your NOV, log in to <http://jobs.tamhsc.edu/hr>.

Our office will furnish a copy of the posting to [www.WorkinTexas.com](http://www.WorkinTexas.com), as well as the A&M Systemwide Jobsite (<http://apps.system.tamus.edu/jobsearch/>).

If you have any questions with this listing, please contact our office at [employment@tam.u.edu](mailto:employment@tam.u.edu) or (979) 458-7268.

## B. Job On Hold

When a job is posted the following email will be sent to all users that have access to that posting:

At your request, the following NOV has been placed on hold to stop the flow of applicants:

Position Title: [Job Title]

NOV #: 200XXXX

Please ensure that the following processes are completed. Refer to the Hiring Process Guide sections shown below for detailed instructions on each of these processes.

1. Complete the Hiring Matrix. *(Section II B)*
2. Prepare your interview. **CORE QUESTIONS MUST BE DOCUMENTED!** *(Section II C)*
3. Print the application(s) of the candidates being interviewed. *(Section II D)*
4. Make an initial selection. *(Section III A)*
5. Conduct the Reference Check(s). *(Section III B)*
6. Prepare Offer Letter. *(Section III C)*
7. Submit the [Background Authorization and Disclosure Form](#). *(Section III D)*
8. Complete the [Selective Service Registration Status](#) form (if applicant is male). *(Section III E)*
9. Change statuses on the HSC Jobsite. *(Section IV A)*
10. Request the Hiring Certificate. *(Section IV B)*
11. Print Hiring Manger Reports. *(Section IV C)*
12. Assemble the Position (NOV) File. *(Section IV D)*
13. Mark your calendar to evaluate the performance of your new employee. *(Section IV E)*
14. Complete New Employee Processing Checklist (or New Faculty Processing or New Student Processing, as appropriate). *(Section IV)*

### **C. System generated Email to applicants**

The message below is sent only if you select “No longer under consideration (send email).” If the hiring department prefers to send their own communication to the applicant(s), select “No longer under consideration (do not send email).”

Thank you for your interest in the [JOB TITLE] position we recently advertised (NOV 20XXXXXX). Our department had an excellent response, and we have selected an applicant whose background most closely met the needs of the position.

We welcome your continued application for positions for which you qualify. Please keep us in mind, and best wishes in your employment search.

Sincerely,

[Signature Line for Email]

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