

New Search Process- Initial Meeting Form

Hiring Authority:

Assigned HR Professional:

Position to Fill:

Date:

Hiring Authority/HR Professional – Initial Meeting

	Step/Task	Notes
Intro	Process Review – see comparison table below	
Position Description and Posting Info	Teleworking? Work location?	
	Position Review <ul style="list-style-type: none"> - Min and preferred qual changes? - Changes needed to PD? 	
	Assessing candidates for qualifications <ul style="list-style-type: none"> - Preferred qualifications – what is most important (drag and drop preferred quals here – highlight more heavily weighted/important) 	
	Supplemental Questions (min quals) <ul style="list-style-type: none"> - Will include appropriate min quals w/basic Y/N - disqualifying 	
	Recruitment Plan <ul style="list-style-type: none"> - Where, budget - Any challenges with recruiting for this position in the past? 	
	Applicant Documents	
	Timeline requests <ul style="list-style-type: none"> - Posting length, when to start semifinalist/finalist interviews, desired start date 	

Interviewing	<p>DEI, bias, best practices for interviewing, acceptable questions</p> <ul style="list-style-type: none"> - provide interviewing and bias guide, upload to MS Teams 	
	<p>Interview Questions</p> <ul style="list-style-type: none"> - Hiring authority or HR pro to create (if HR pro not assisting, have a quick review to provide feedback/approve) <p>Remind to upload notes</p>	
	<p>Interviewers Plan</p> <ul style="list-style-type: none"> - Who at what stage 	
	<p>Search Support Identified</p> <ul style="list-style-type: none"> - Hiring authority to connect w/search support on requested assistance (e.g. arranging travel, meeting invites, emails to applicants not selected, etc.). 	
HR Next Steps	<p>Create MS Team Channel</p> <ul style="list-style-type: none"> - add interviewers/ search support, docs, info. Will be main platform for communication 	
	<p>Communication Plan</p> <ul style="list-style-type: none"> - will inform when new candidates have met min qualifications and are worth your review - inform HR pro if wishing to extend posting - inform HR pro if moving forward with interviews - provide and upload justification/feedback from interviews in Teams 	

Next Steps:

Position submission in TMS

1. If requesting position changes, HR professional will track changes updated in the intake meeting or send position description for editing to the hiring authority (with track changes). Certain fields cannot be edited through the AP Pilot process with the “immediate update” feature – consult with your HR Professional for guidance. Final draft provided to HR Professional for review.
2. HR professional will create the position in TMS and notify the Teams channel when the posting is live.

Post to External Sites

3. Hiring authority, interviewer, search support will post/send/share per the recruitment plan. HR professional will provide a graphic to share on social media.

Interview and Documentation

4. Hiring authority (with optional assistance from the HR professional) will create interview questions for semifinalist phone interviews and finalist interviews and save them to the Teams file. Hiring authority to request question review when ready.
5. HR professional will review, provide feedback, and approve these questions prior to conducting interviews.
6. HR professional will review applicants for minimum qualifications and notify the hiring authority of high-quality applicants who met qualifications.
7. Hiring authority informs HR professional of the candidates they would like to interview (informing only, no approval needed).
8. Hiring authority and interviewer(s) conduct phone interviews (or move to finalists interviews with approval if the high-quality pool is small and at/close to full-consideration date).
9. Hiring authority notifies HR professional of candidate(s) being invited for finalist interviews
 - Provides written justification for all candidates interviewed (both those moving forward and those not selected for further interviews) in the Teams file.
10. Hiring authority selects the candidate to hire.
 - Sends HR justification: include the proposed salary for candidate requested for hire.
 - HR professional reviews justification and moves applicants in TMS AP Pilot workflow.
 - Sr. HR Manager will review the proposed salary offer for approval or further discussion.
 - Approval received to extend a verbal offer after OEO approvals and approved salary proposal - contingent on background check.
 - With verbal offer acceptance, HR initiates hiring proposal and moves selected candidate to background check.
11. HR drafts offer letter. Once the background check is completed, HR sends to the hiring authority the final offer letter to present to the candidate.
12. Signed offer letter is returned to hiring authority and sent to HR to upload in TMS.
13. Hiring is completed in TMS and onboarding commences.