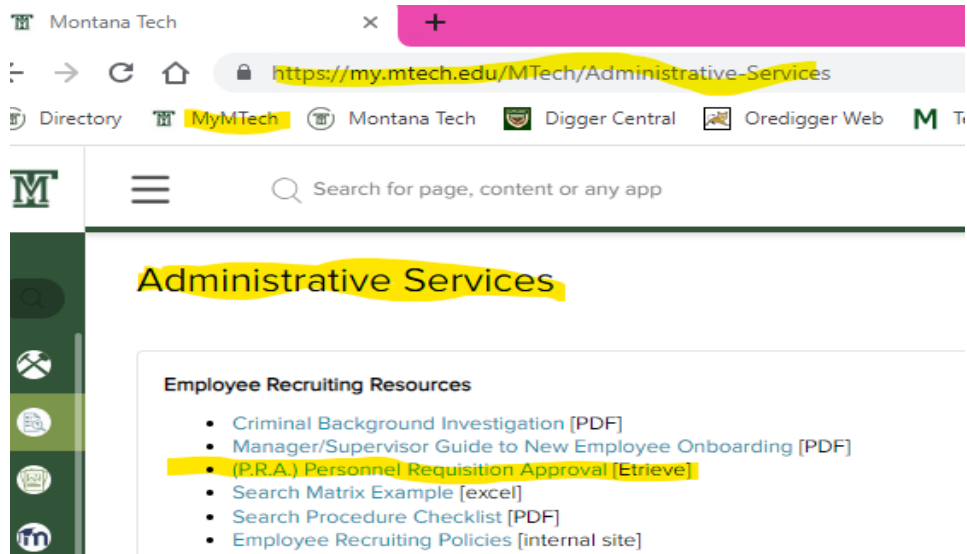


# MONTANA TECH

## SEARCH CHECKLIST

- DEVELOP PRA AND OBTAIN APPROVALS FROM YOUR DEPARTMENT HEAD/DIRECTOR/DEAN/BUDGET DIRECTOR BEFORE DOING ELECTRONIC FORM.**
  - a. PRAs are done electronically through Etrieve. It is located on MyMtech under Administrative Services.
  - b.



- c. Signatures/Approvals are obtained from: the HR Director/EEO Officer, the Academic VC/Provost, the Vice Chancellor of Administration and Finance and then Chancellor.
  - d. After all approvals are received, it returns to HR, so it can be posted.
  - e. You may check on the PRAs progress by clicking on the “history” button at the bottom of the menu. There you can see where it is in the process.
- ESTABLISH SEARCH COMMITTEE AND NOTIFY PERSONNEL OF COMMITTEE MEMBERS**
  - It is best to establish your search committee when you are getting ready to post the job. Do not wait until the job is about to close or has closed. ( This will cause delays.)
- SCHEDULE EEO TRAINING**
  - Send an email to the HR Director with a list of all members of the committee.
  - The committee members will be given access to the Moodle EEO Training course, available in MyMytech.
  - If the committee member has done their training in the last 6 months, they do not need to do it again.
  - The committee members that need the training can do it at anytime after the access to the course is given. Access usually is available the next work day after they are added to the training.
  - The training, including the quiz must be completed before the committee members can be given access to the posting and applicants. **Please note, the committee chair must also send an email to the HR director and request access to the posting the day after the posting closes with the required information. (title of the posting and name of all of the committee members) This is not an automatic process.**

- The committee cannot have access to the posting until the day after the position closes.
- **If you have external members (not tech employees) on your committee, a guest account can be generated for them and they can log in and complete EEO Training using that information. Please contact Vanessa/HR to request a guest account.**

**SET UP MATRIX ACCORDING TO THE PRA**

- List required qualifications
- Required skills
- Preferred Qualifications
- Preferred skills

**SCREEN APPLICANTS** - Those that don't meet minimum qualifications will be identified for you, and should be included on the matrix. You can choose to take the computer's word for it and not review those, or you can choose to review all the applicants placed in that bucket. Keep in mind that if you choose to review one candidate that the computer identified as "does meet minimum qualifications" you must do it for all.

**COME TO A CONSENSUS AND RANK CANDIDATES ACCORDING TO TIER**

- Top Tier
- Middle Tier
- Bottom Tier
- Doesn't meet minimum Qualifications

**MAKE A DECISION ON WHAT YOUR NEXT STEP WILL BE – but don't proceed with the next step until your consensus matrix and next step has been approved.**

It can be phone screens, where you call and provide the candidates with the salary range, find out if they are still interested and then get permission to check references

**OR**

You can choose to do phone, zoom or in person interviews next.

**CONTACT THE EEO/AA OFFICER AND EMAIL YOUR MATRIX AND YOUR PLAN FOR THE NEXT STEP.**

- Please include and discuss your planned next step with EEO Officer.

**Your next step can be:**

- Do phone screens (as mentioned above) for all of the top tier candidates
- Call references of all the top tier candidates
- Call references of all of the top and middle tier candidates
- Set up Zoom Interviews for all of the top tier candidates
- Set up in person interviews for all the top tier candidates

**ONCE THE MATRIX IS APPROVED, AND YOU RECEIVED APPROVAL FOR YOUR PROPOSED NEXT STEP. YOU CAN PROCEED TO YOUR NEXT STEP**

- Once approval is obtained you can move to the next step (which is usually) calling references. It could also be a 1<sup>st</sup> round of phone interviews to narrow down the candidate list or other options on a case by case basis.

**PLEASE NOTE: YOU MUST GET APPROVAL FROM THE EEO/AA OFFICER ANYTIME YOU REMOVE CANDIDATES FROM CONSIDERATION.**

- **IN ORDER TO GET APPROVAL, YOU MUST PROVIDE A DETAIL REASON WHY YOU CHOOSE EACH CANDIDATE TO MOVE FORWARD AND WHY YOU DID NOT CHOSE TO MOVE EACH CANDIDATE FORWARD.**

**ONCE YOU FINISH YOUR FIRST STEP, DETERMINE WHO YOU WANT TO MOVE FORWARD IN THE PROCESS AND GET APPROVAL TO DO SO FROM THE EEO/AA OFFICER.**

**FOR EXAMPLE:**

- **GET APPROVAL TO DO PHONE SCREENS**
  - Complete form II and include anyone that withdrew from consideration
- **GET APPROVAL TO CHECK REFERENCES**
  - Complete form II and include anyone that withdrew from consideration
- **GET APPROVAL TO DO ZOOM INTERVIEWS**
  - Complete form II and include detailed information regarding any candidate that is not proceeding to the next step and include any candidates that withdrew themselves from consideration
- **GET APPROVAL TO DO IN PERSON INTERVIEWS**
  - Complete form II and include detailed information regarding any candidate that is not proceeding to the next step and include any candidates that withdrew themselves from consideration

**CONDUCT LAST STEP IN THE PROCESS WITH THE FINALISTS**

**COMPLETE FORM III *OR* DO A MEMO *OR* SEND AN EMAIL – FINALIST SELECTION**

- State who the committee wants to hire as their first choice and why.
- If Applicable, you can state your second choice and why, if your first choice does not accept the offer.
- You must also provide a detailed reason why the other candidates were not chosen. The reason must be related to the job description and qualifications listed for the job.

**BEFORE THE OFFER IS APPROVED BY THE EEO/AA OFFICER – OTHER APPROVALS MUST BE OBTAINED DEPENDING ON THE POSITION:** (This can be done by email/verbally or by phone)

- **FACULTY POSITIONS OR DIRECTOR / HIGH LEVEL PROFESSIONAL POSITIONS** – Must be approved by the Dept. Head, Dean, Provost and Chancellor
- **CLASSIFIED STAFF** – Must be approved by the Dept. Head or Director
- **MBMG** – Must be approved by John Metesh and Chancellor

**MAKE VERBAL OFFER-** usually done by chair but it can be done by Dept Head

**COMPLETE A PERSONNEL ACTION FORM (PAF) AND SEND TO THE EEO/AA OFFICER/HR DIRECTOR.**

- **Make sure to include:**
  - Relocation – if offered
  - Time toward tenure of promotion
  - Research Start up packages
  - Start Date
  - Salary
  - Title

**OFFER LETTER AND/OR CONTRACT GETS DRAFTED AND SENT OUT – HR DIRECTOR WILL MAKE THE REQUESTS SO ALL PAFS NEED TO COME TO THE HR DIRECTOR.**

- Professional Offer Letters are handled by HR Director.
- Faculty Offer Letters are handled by Colleen Fink –

- Does not include visiting instructors/faculty
- Letters of appointment for any title including visiting faculty are handled by HR Director
- Classified Offer Letters are handled by Cathy Isakson

**HR WILL CLOSE OUT THE POSTING WHICH INCLUDES EMAILING REMAINING REJECTION LETTERS TO CANDIDATES**

**SEND THE FOLLOWING DOCUMENTS TO HR/CATHY ISAKSON FOR THE SEARCH FILE**

- **CONSENSUS MATRIX**
- **REFERENCE CHECKS – QUESTIONS AND ANSWERS**
- **INTERVIEW QUESTIONS/NOTES – QUESTIONS AND ANSWERS**
- **FORMS II – REFERENCE CHECKS & INTERVIEW APPROVAL FOR EACH STAGE IN PROCESS**
  - i.e. Form II for approval to do Reference
  - Form II for approval to do Zoom Interviews
  - Form II for approval for an in person offer
- **FORM III- FINAL SELECTION**

**CANDIDATE SHOULD CONTACT HR TO DO THEIR NEW HIRE PAPERWORK AT LEAST 2 WEEKS BEFORE THEIR START DATE. (this will ensure a smoother onboarding process and a more productive first day)**

- **IN ADDITION, THEY MUST REPORT TO HR ON FIRST DAY OF WORK AND THEY MUST HAVE THEIR ORIGINAL DOCUMENTS THAT PROVE THEIR ELIGIBILITY TO WORK IN THE US. COPIES ARE NOT ACCEPTABLE.**

**HIRING MANGAGER NEEDS TO COMPLETE THE ONBOARDING CHECKLIST**