Applicant Summary Log Instructions for Pools

This log is an Excel spreadsheet that can be maintained electronically (preferred method) with the completed log submitted electronically to the Office of Affirmation Action & Equal Opportunity (OAAEO) when the pool closes. Alternatively, the log can be printed out and used as a hard-copy form with a copy submitted to OAAEO when the pool closes.

1. When a new pool is approved and posted, OAAEO will send an Applicant Summary Log pre-populated with the Posting Number, Department, Job Group, and Census Code (lines 3 & 4).¹
2. When you receive the first application, enter the application receipt date and the candidate’s name on the log (line 11, columns A & B).
3. If you have received information from the Office of Affirmative Action indicating that the candidate has identified as a Veteran or a Disabled Veteran please enter “Vet” or DisVet” in line 11, column C. If that candidate meets the pool basic minimum qualifications (see #4 below) you must include documentation in your files related to how the Oregon Veterans’ Preference requirement was applied for that candidate at each step of the selection process.
4. Review the application materials to determine if the candidate followed required application procedures and possesses the basic minimum qualifications for the pool as stated in the posting/advertising.
   a. Required application procedures may include submission of all requested materials (letter of interest, CV, references, supplemental questions, etc.), receipt of materials in time to consider for open position, and/or materials submitted via requested mode (electronically, US mail, online applicant management system, etc.).
   b. Basic minimum qualifications often include education credentials (degree, certification, license), and amount/type of required professional experience (teaching, research, advising, etc.). Some postings may cite different minimums based on the anticipated needs of the department. The basic minimum is the least rigorous qualification. For example, if a posting states that a M.A. is acceptable for certain openings, but a Ph.D. is required for other openings, the M.A. is a basic minimum qualification.
   c. If the candidate adhered to required application procedures and has the basic minimum qualifications put an “x” in line 11, column D.
   d. Candidates who do not have an “x” in Column D should not be considered for any open position.
5. If the candidate does not meet the basic minimum qualifications (no “x” in column D), indicate in column E the disposition code for the qualification(s) or procedure(s) not met. Please refer to Sheet 2 of the Applicant Log for sample disposition codes. You may also create customized codes (Column D of sheet 2) to meet your specific circumstances. When submitting the applicant log to OAAEO be sure that Sheet 2 identifies the disposition codes used in your selection process.
6. As additional applications are received, repeat steps 2-5 using lines 12, 13, 14, etc. as many times as necessary until the pool is closed. All candidates who have applied to your pool should be included on this log.

¹ When completing the RTO after a selection has been made, the Posting Number, Job Group, and Census Code should be noted in the Internal Comment section of the RTO.

G:\Search Administration\Revised Open Applicant Pool Process\2013 Applicant Summary Log Instructions.docx 12/11/2012
7. When ready to make your first selection from the pool:
   a. Review the qualifications of those candidates whose material has been received and who meet the basic minimum advertised qualifications ("x" in Column D) to see if they meet any additional minimum qualifications necessary for this particular position. For example, the pool for adjunct instructors in English may have a minimum qualification of a M.A. in English for teaching certain writing courses, but require a Ph.D. in English to teach literature courses. Place an “x” in column F for those candidates meeting any additional required qualifications for this specific hire.
   b. Follow previously determined selection procedures for all candidates with an “x” in column F to decide which applicant will be offered the position. These procedures should be documented in your search files.
   c. Insert in column G the disposition code (from Sheet 2) identifying either the reason for selection or non-selection for each candidate with an “x” in column F.
   d. Once an offer has been made and accepted, fill in Hire Decision Date (line 7, column F), Period of Appointment (line 8, column F), and Name of Selected Candidate (line 9, column F).
   e. Please refer to the attached Excerpts from “Open Applicant Pool Searches & Appointments” for hiring packet procedures and documentation requirements.

8. For subsequent hires repeat steps 7a-7d, entering information in the appropriate columns and adding additional columns if needed.

9. At the end of the pool year and after the last hire has been made from this pool, request a “pool closing” compliance statement from the Office of Affirmative Action and Equal Opportunity (6-3123 or irini@uoregon.edu). Please refer to the attached Excerpts from “Open Applicant Pool Searches & Appointments” for compliance statement documentation requirements.

Renewals

Candidates Previously Hired from the Current Open Pool

Candidates who were originally hired for less than a full year may be eligible for renewal from the current open pool. When renewing such a candidate, they should not be included as another “selection” on the Applicant Summary Log. No applicant should be included as a hire more than once in the Applicant Summary Log for the same pool. When submitting the renewal RTO to Unclassified Personnel Services, identify the Posting Number, Job Group, and Census Code in the Internal Comment section.

Candidates Hired from a Previous Pool but Still Eligible for Renewal

Candidates hired from a previous pool may still be eligible for renewal from that pool for up to three years, if there has not been a break in service of more than one year. If you are uncertain as to whether a candidate is eligible for renewal from the same pool, please contact Unclassified Personnel Services. When no longer eligible for renewal the candidate would need to apply to the current open pool or the department should consider whether a career NTTF search and appointment should be pursued (see the Non-tenure track faculty (NTTF) policies).

These renewals are not part of the current pool and should not be included in the applicant log for the current pool.
Excerpts from “Open Applicant Pool Searches & Appointments” Guidelines

Hiring Documentation

When hiring from an open applicant pool, departments need to submit the documents listed below. The documentation will go from Department, to Dean’s Office, to Unclassified Personnel Services:

- **Request to Offer Appointment**  NOTE: For affirmative action tracking purposes, the Internal Comment section of the RTO for each candidate hired from a pool must include the pool posting #, the job group and census code (from the Applicant Pool Log).

- Position description for position being filled, with minimum and desired qualifications or, for instructional positions, list the course(s) to be taught and preferred training and experience relevant to those assigned courses.

- Copy of candidate’s application materials, including vita and a signed application form.

- All search files must be retained for three years after the pool has closed.

Compliance Statement

At the end of the one-year period that a pool is open, the OAAEO will forward to the department the appropriate compliance statement for the pool. At that time, the department will need to do the following (electronic submission is preferred):

- note the total number of candidates who applied to the pool
- provide a list of all recruitment sources, with dates that announcements appeared
- provide a copy of the cumulative Applicant Summary Log and disposition code legend
- sign the compliance statement
- forward the completed and signed compliance statement to the Office of Affirmative Action & Equal Opportunity.

Refer to [2013 Open Applicant Pools Searches and Appointments](#) guidelines for additional information.