

Academic Personnel Services

Part-time Pool Applicant Processing Guide

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Part I. Part-time Pool Application Management Process

In order to track applicants to the part-time faculty pools, for reporting purposes, we have developed a process for departments to create Excel spreadsheets to track applicants.

- 1) As new applications are received for your part-time faculty pool, enter applicant information in the Part-time pool spreadsheet template (**PTPoolApplicantSS.xls**). You will only have to keep a spreadsheet and send out acknowledgement emails to non-incumbents applicants who are applying using the Application for Lecturer Appointment. **You will not have to send out emails or keep a spreadsheet of the incumbent lecturers who fill out a Request for Subsequent Lecturer Appointment form.** Additionally, because new applications will now be kept on file for three years, you will only have to do the spreadsheet & email process for the new applications you receive each year.

You will be using this spreadsheet to create email acknowledgements for the applicants to confirm receipt of their application as well as to provide them with a web link for the **Confidential Applicant Data Form**.

The spreadsheet template has been set up with the following fields:

AppDate	Required Field	Date application was received
LastName	Required Field	Applicant last name
FirstName	Required Field	Applicant first name
Prefix	Required Field	Name prefix (i.e., Dr., Ms., or Mr.)
Job#	Required Field	Part-time pool job number for your department
Department	Required Field	Your department name
EmailDate	Required Field	Date you sent email to applicant acknowledging receipt of application. You will leave this field blank until after you have sent your email.
AppComplete	Required Field	Indicate whether the application is complete (i.e., yes or no)
MinQuals	Required Field	Indicate whether the applicant meets the minimum qualifications for the position (i.e., yes or no). You will leave this field blank until after applications have been screened.
Email	Required Field	Applicant's email address
MissingStatement	Optional Field	If you would like to let applicants with incomplete applications know which documents are missing, you can use this field in conjunction with the MissingItems field. Using this field you can insert a sentence like "The following items are missing from your application package and should be supplied to our Department as soon as possible for full consideration of your application:" to your email acknowledgement letter.
MissingItems	Optional Field	If you choose to let applicants with incomplete applications know which documents are missing, list missing items here (separated by a comma and ending with a period) (e.g., 2 Reference Letters, Transcript copies.) This field is set up to be used in conjunction with the MissingStatement field.

- 2) Update the email message template (**PT_App_Email.doc**) with your Department information (your name, department, contact information, etc.), then create your email acknowledgements using the mail merge process is described in Part III of this guide. Note: in order to use the mail merge process to send out emails, you will need to use an email client (e.g. Outlook, Mac Mail); the web-version of Zimbra does not allow users to do email-merges. If you are not currently using an email client you can use the mail merge process to merge to letters, and then cut and paste the merged information into individual emails.
- 3) Update your spreadsheet with the date the email was sent to this group of applicants.
- 4) You will need to track which applicants you have sent acknowledgements so that you do not send acknowledgement emails to the same applicants more than once. As you may recall, when we were using PeopleSoft and our previous letter acknowledgement process, the system tracked which applicants were new entries (versus ones that you had already pulled into spreadsheets to send acknowledgements). Excel does not have this same capability, so you will need to manually manage your applicants. Here are a couple of suggestions for how to keep track of which applicants have already received emails:
 - a. Option 1: When you are doing your mail merge, use the “Edit recipient list...” option on Screen 3 of the mail merge windows to select only those applicants you have not already emailed (Check those you want to include in the current batch, uncheck those that have already been emailed). You can use the email date field to figure out which applicants have received an acknowledgement email.
 - b. Option 2: Use the cut and paste features to move applicants to whom you have already sent email acknowledgements from the first sheet of the Excel workbook to the second sheet of the workbook. In our template, we have set up the sheets for this option. The tabs at the lower left of the workbook are titled “Unsent” and “Sent” to help you manage your applicants using this option.
- 5) Use your part-time pool applicant spreadsheet to create the Form 2 Applicant Log for your department. Your Form 2 should be kept on file in your department office.
- 6) Send an electronic copy of your part-time pool applicant spreadsheet to Jana in Academic Personnel Services (jana.wilson@humboldt.edu). We do not have the central PeopleSoft system for storing applicant information, so our department will serve as the central repository for part-time pool applicant lists.

The deadline for departments to send their spreadsheets to APS is May 1 of each year. Please remember that you are creating an annual pool of applicants, and any applications received throughout the year should be added onto your master applicant spreadsheet, rather than creating a separate spreadsheet. Any updated spreadsheets should be sent to Academic Personnel Services.

Part II. Questions and Answers about the Part-time Pool Applicant Management Process

1) Do I really have to do this?

We are required to maintain records of all applicants to positions on campus in order to comply with our Equal Employment Opportunity policies. The information received from the Confidential Data Form is also used to fulfill our Affirmative Action reporting requirements. Therefore, yes, you are required to maintain a spreadsheet of your department applicants, send them an acknowledgement that contains the Confidential Applicant Data Form and Applicant Statement links, and send an electronic copy of your spreadsheet to Academic Personnel Services for our records.

2) I'm having problems getting email merge to work. What can I do?

For those of you using Microsoft Outlook, the email merge process should work automatically. Please contact your ITC for help with setting up your computer to allow email merge if you are having problems. Alternatively, you can do a merge to **letters** (instead of **emails**) and when your merge is complete, copy and paste the text of each page into a separate email. (See Question #5 below.)

3) How do I know the merge process worked and email messages were created?

You can change your email settings in your email program (e.g., Outlook) to confirm that your email messages are going to your applicants. By changing these settings, your messages will wait in your Outbox until you click Send/Receive to send the messages. You can view the messages in your Outbox, add a cc to yourself, or modify messages, if needed.

The process: In Microsoft Outlook, go to **Tools**, then **Options**, and then click on the **Mail Setup** tab at the top of the open window. Uncheck the box marked "**Send immediately when connected**". Click on the **Send/Receive** button. Uncheck the boxes marked "**Schedule a send/receive every __ minutes**" and "**Perform an automatic send/receive when exiting**", then click **Close** and **OK** to close the screens and apply the changes.

As an alternate option, if you don't want to change these settings, but you would like to know that the process worked, you can add your email address to the spreadsheet and create a merged email for yourself to confirm that the emails were sent. (Sent emails should also appear in your Sent box.)

4) How do I know the applicants received my message?

In your email program, you can request a delivery and a read receipt. If you choose to request a delivery receipt, you will receive a message back letting you know whether the message was delivered successfully to the applicant's email address. If you request a read receipt, a message box will be sent to applicants when they view your email message letting them know that you have requested a read receipt and asking if they would like to send one. Applicants may choose to send a read receipt or not.

The process: In Microsoft Outlook, go to **Tools**, then **Options**, and then click on the **Preferences** tab at the top of the open window. Click on the **Email Options** button, then the **Tracking Options** button. In the center of the screen, check the boxes marked **Read Receipt** and **Delivery Receipt**, then click **OK** a few times to close the open screens and apply the change.

Note: *You must change these settings prior to creating your email messages in order for the delivery and/or read receipt request to be attached to your email messages. (In other words, if the email messages are already waiting in your Outbox, when you change the settings to request a delivery and/or read receipt, the request will not be attached to the email messages.)*

5) I would like a copy of the email messages I sent for my applicant files, but it's a lot of work to print each individual email message. Is there a better way to do this?

Using the same steps as for an email merge, you can do a letter merge either before or after you send out your email acknowledgements. This allows you to print all of your acknowledgement letters at one time. If you are having problems with doing the email-merge process, you can also use this process to create the letters, and then cut and paste them into emails.

The process: On the mail merge menu (shows up as a column on the right part of your screen), you can use the **Previous** and **Next** step options at the bottom of the screen to easily move between steps in the mail merge process. Click **Previous** a few times to get back to the first step, and then under **Select document type**, click **Letters**. Continue the steps in the mail merge process as described below.

Note: *If you have already created your email messages, all the settings are saved, so you can just click on **Next** until you reach the last mail merge screen.*

6) I would like to modify the templates for the email and spreadsheet. Is that okay?

Yes, it is fine to modify our email and spreadsheets to fit your department needs. Please note, however, that your email message must include a link to the **Confidential Applicant Data Form**. You must also include the paragraph describing the use of the Confidential Data Form. Your spreadsheet must include the following data: **Application date, Candidate name, Job#, Department, Date Email was sent, whether the application was complete, whether the applicant meets minimum qualifications for the position, and Email address.**

Part III. Email Mail-merge Process Guide (for Microsoft Word 2007) for use with an email client (e.g. Outlook, Mac Mail) Note: this process cannot be used with the web-version of Zimbra

Open up the *Part-time Pool Applicant Acknowledgement Sample Email* on the APS web site:
http://www.humboldt.edu/~aps/docs/PT_App_Email.doc

1. Click the **Mailings** tab, click **Start Mail Merge**, and then click **Step by Step Mail Merge Wizard**.
 2. A box will pop up on the right side of the screen, click **E-mail messages**.
 3. Click **Next: Starting document** (at the bottom of the box).
 4. Click **Use the current document**.
 5. Click **Next: Select recipients**.
(*This is where you identify your Excel applicant spreadsheet for merging into your email message.*)
 - a. Under **Select recipients**, click **Use an existing list**.
 - b. Click **Browse**.
 - c. In the **Select Data Source** dialog box, locate and click the data source you want.
By default, Microsoft Word opens the **My Data Sources** folder. *Instead, go to the folder where your Excel file is saved and select it. Tip: Save the Excel file on your Desktop for easy access.*
 - d. Click **Open**.
Other dialog boxes may appear requesting specific information. If your Microsoft Excel spreadsheet has information on multiple tabs, you need to select the tab containing the information you want, and then click **OK**.
 6. Click **Next: Write your e-mail message**.
 - a. In the main document, modify the text that you want to appear in every e-mail message. *This is where you customize the "APS" letter for your department – i.e., name, title and contact information of person "signing" the message.*
 - b. Insert merge fields where you want to merge names and other information such as the greeting. *For your convenience, the sample email has been set up with merge fields already included to match the sample Excel Spreadsheet.*
 1. In the main document, click where you want to insert the field.
 2. On the **Mailings** tab, click **Insert Merge Field** and select the name of the appropriate field.
- After you've completed the main document and inserted all of the merge fields, click the **Microsoft Office** button menu, and then click **Save As**. Name the document, and then click **Save**.
7. Click **Next: Preview your e-mail message**. Preview the items. Do one of the following:
 - a. To preview the items in order, click the arrow buttons.
 - b. To locate and preview a specific item, click **Find a recipient**, and then enter the search criteria in the **Find Entry** dialog box. *This allows you to personalize a message, or to add information specific to a single recipient.*
 8. Click **Next: Complete the merge**.
 9. Click **Electronic Mail**.
 10. In the **Merge to E-mail** dialog box, finalize the distribution settings.
 - a. In the **To** box, verify that the word **Email**, **Email_Address**, or the equivalent is displayed. This ensures that Microsoft Word merges e-mail addresses into the **To** line of your messages, not some other merge field information.
 - b. In the **Subject line** box, type the subject line you want to use for all the messages, e.g. *Application Acknowledgement or Receipt of Application, etc.*
 11. To complete the merge and send the messages, click **OK**.