Appointees in this category are normally full-time salaried employees. Individuals holding this type of appointment are usually tenured.

Many of the following steps will use CLOmatic, a web-based process manager whose use the BSD requires. CLOmatic will prompt the department for all required information and documents. In most cases CLOmatic will populate forms with information entered in previous steps (so it need not be re-entered). If this information has changed and needs to be modified [or for any CLOmatic advice or help], contact the Office of Academic Affairs. Other steps will be in the Academic Career Opportunities (ACO) website and WorkDay [WorkDay Reference Guide].

BEFORE selection of a successful applicant

1. Obtain permission to recruit
   - Clinical Department
     - Initiate a new Position Control Template in CLOmatic and enter all required information. You may wish to view a sample entry in advance to gather the required information. For clinical departments, this is the point of entry to the CLOmatic process.
   - Basic Science Department
     - Obtain permission in writing (email ok) from the Dean for Basic Science. [Preserve this for a later step.]

   ---[After permission is granted proceed to next step]---

2. Blank

3. Department drafts a ‘position description’ for eventual inclusion in the Academic Career Opportunities (ACO) website and external publication.

   Download position description composition app
   - BSD track

4. Department submits the draft position description to the Office of Academic Affairs (as an email attachment) for review and approval.

5. Department uploads the approved position description to the Academic Career Opportunities (ACO) website.

6. Department initiates a Request Posting Template in CLOmatic and enters all required information. You may wish to view a sample entry in advance to gather the required information.

   - Clinical Department
     - Launch the Request Posting Template and upload the ACO ad preview.
   - Basic Science Department
     - Initiate a Request Posting Template. For Basic Science departments, this is the point of entry to the CLOmatic sequence. It will ask you to upload the permission to recruit from the Dean for Basic Science, obtained in Step 1.

7. External publication of the position description
   - Clinical Department
     - Publish the approved position description text verbatim in at least one appropriate external outlet.
     - Save the receipt and a screenshot of the published ad for uploading.
     - Launch a Post External Ads Template in CLOmatic and enter all required information. You may wish to view a sample entry in advance to gather the required information.
   - Basic Science Department
     - The Office of Academic Affairs will publish the position description in external outlets selected by the Department, and provide screenshots of the published ad(s) and receipt(s) to the Department.
     - Department launches a Post External Ads Template in CLOmatic and enters all required information. You may wish to view a sample entry in advance to gather the required information.

8. Department launches the Search Narrative Preparation Template in CLOmatic. DO NOT ENTER complete answers to Search Narrative Questions 1 and 2. Instead, enter any character (e.g., “XX*”). This is necessary to force CLOmatic to proceed to the next step.

9. Fill in the GREEN portion of the Search Narrative app and send to OAA as an email attachment. This should be done no later than 7 days after the external advertisement, but may be at the same time or before. The search narrative app may be downloaded from:
   - Download search narrative app

   The green portion and its corresponding questions:
OAA will check your entries and either notify you of issues that must be corrected or return the approved GREEN portion with the MAROON portion open for the next set of entries.

**STEPS 10 (outreach) and 11 (determination of criteria to be applied) can be completed at the same time.**

10. **Perform the OUTREACH component of the search.** Acquire the names of prospective applicants, especially women, underrepresented minorities, and members of other protected classes, and persuade them to apply. Escalate this persuasion as necessary. Maintain records of the names and mode of contact for prospective applicants persuaded to apply. These will need to be entered in the top of the MAROON BOX in the search narrative app. Warning: Be certain the outreach expectations are understood and can be met; do not progress beyond the next step until they are.

11. The search decides which criteria should be used to select interviewees, and enters them in the MAROON portion of the search narrative app.
12. Submit the search narrative app with MAROON portion completed to OAA by emailing it as an attachment to oaa@bsd.uchicago.edu. OAA will check your entries and either notify you of issues that must be corrected or return the approved GREEN and MAROON portions with the BLUE portion open for the next set of entries.

13. OAA will notify department when faculty may access the files for qualified applicants in the Academic Career Opportunities (ACO) website. Usually this will never be within 31 days after the external ad publication and may be later if outreach is incomplete, the MAROON portion of the search narrative app has not been received, the position description states a later date.

14. Department launches the Start Evaluation Process Template in CLOmatic. You may wish to view a sample entry in advance. This step requires entry of the external posting date and upload of the applicant log from the ACO.

15. After this time has elapsed, faculty compare all surviving qualified applicants (and must not consider any who are not qualified applicants), eliminating qualified applicants in successive rounds until all unsuccessful applicants are eliminated. In winnowing the applicant pool to those who will be interviewed (i.e., the short list), create and use a scoring spreadsheet that corresponds to the criteria and weights decided in Step 11. Be certain to obtain letters of reference for all finalists if this has not been done already.

16. During or after completion of the previous step, the Department launches 2 successive steps in CLOmatic and supplies all required information:

   1. The Short List Template. You may wish to view a sample entry in advance to gather the required information. Documents to be uploaded: the short list.
   2. The Applicant Selected Template. You may wish to view a sample entry in advance to gather the required information. Documents to be uploaded: the successful applicant’s CV.
AFTER selection of a successful applicant

17. Department negotiates draft offer terms with the successful applicant(s). It is prudent to inform the Dean for Basic Science about the successful applicant(s), and to consult the Dean's Office about reasonable offer terms so that there is no objection from the Dean's Office about draft terms ultimately agreed to. Note that for Basic Science Department candidates and often basic scientist candidates in clinical departments, consultation with the Master of Biological Sciences Collegiate Division is required.


- Initiate Citizenship Template in CLOmatic and enter all required information. You may wish to view a sample entry in advance to gather the required information. No documents are uploaded.
- Initiate Academic Support Template in CLOmatic and enter all required information. You may wish to view a sample entry in advance to gather the required information. Elements will include new equipment needs and location, core facilities needs, CRI support needs, biostatistics support needs, prospective teaching, accommodation of graduate students and postdocs who will accompany the appointee, search narrative part 2 (criteria, basis for selection, search committee roster), and clinical information if any is needed. Because you will be using the search narrative app to convey search narrative information, please enter a character or two (e.g., "XX") in any search narrative question calling for an answer.
- Initiate Finance Package Template in CLOmatic and enter all required information. You may wish to view a sample entry in advance to gather the required information. Elements include finance information and an updated pro forma. Document to be uploaded: revised pro forma.
- Initiate Space Planning Template in CLOmatic and enter all required information. You may wish to view a sample entry in advance to gather the required information. Elements include office location, laboratory location, additional space, and renovation funding source.
- Initiate Animal Resource Template in CLOmatic and enter all required information. You may wish to view a sample entry in advance to gather the required information.
- Complete the CLO Letter Editor step in CLOmatic. Enter random text (e.g., "XX") in any text fields that call for an entry. Enter dates; they don't need to be accurate. Upload the PIPA in the unlikely event this is for a candidate who will have clinical privileges.
- As attachments to an email to oaa@bsd.uchicago.edu, send OAA (a) the applicant scoring spreadsheet created in Step 15, and (b) the search narrative app with the BLUE box completed. If you have not yet taken a faculty vote, it is ok to add this in a later step.

After review, OAA will create a final Search Narrative, which should be dated, have a faculty member's name entered, and initialed by the faculty member. Scan the original and save the scan (it will be needed later).

19. Department initiates "CLO Execute - Submit CLO Letter to Applicant" step in CLOmatic. You may wish to view a sample entry in advance to gather the required information. This will include

- Creating the Search Narrative via the "Generate Narrative File" button. Enter random text if necessary. The version you generate should be discarded.
- Upload the scan of the signed copy of the final Search Narrative generated in Step 18.
20. Await the approval of the Office of Academic Affairs to provide the Contingent Letter of Offer to the successful applicant(s).


AFTER release of an approved contingent offer

22. When the outcome of the offer is known, Department launches the "Execute CLO - Selected Applicant Acceptance" step in CLOmatic.

- If a signed offer letter is returned (i.e., if the offer is accepted), select "Yes" after "Applicant Accepted the Position and Signed the CLO Letter?" and upload a scan of the signed offer letter. You may wish to view a sample entry in advance to gather the required information.
- If the offer is not accepted, the successful applicant requests a revised offer, and you wish to extend one, select "No" after "Applicant Accepted the Position and Signed the CLO Letter?" CLOmatic will then ask: "Applicant Requested Counter Offer:"; select "Yes" and upload the revised Letter of Offer. You may wish to view a sample entry in advance to gather the required information.
- If the offer is not accepted and you wish to extend an offer to a runner-up in the search, select "No" after "Applicant Accepted the Position and Signed the CLO Letter?" CLOmatic will then ask: "Applicant Requested Counter Offer:"; select "No". CLOmatic will then allow the department to initiate a new offer beginning with Step 10 part 3 above.
- If it is decided not to fill the position, please notify the Office of Academic Affairs.

23. If the contingent offer is accepted and attending privilege will be required, immediately contact the contact the Medical Staff Office at 773-702-3559 or medicalstaffoffice@uchospitals.edu to begin arranging for privileges. This may take some months, so the sooner the better.

24. If the contingent offer is accepted, request a COAP date. [This may be done earlier, but the date can be confirmed only when a signed CLO is received.] Remember:

- The external letters need to be in hand by 3 weeks before the COAP date, so time their solicitation accordingly.
- The case will be due noon 3 weeks in advance of the COAP date, so request a date that allows time for preparation.
- Anticipate a start date no earlier than 4 weeks after the COAP date. The various post-COAP reviews usually take much less time, but sometimes a key approver may be overwhelmed or on vacation.

If you discover an urgent need to expedite the appointment, contact the Office of Academic Affairs immediately, which will attempt to help if it can.


26. Department prepares appointment case for review by COAP. When all documents are assembled, follow the instructions and email the PDFs as an attachment to oaa@bsd.uchicago.edu. Revisions may be requested between submittal and the COAP meeting. At the time of the COAP meeting transmit the final revised version of the assembled documents in hard copy to the Office of Academic Affairs. NOTE: This step is outside CLOmatic.

- Updated CV & required statements. The recommended CV format is welcome but not required.
- Up to 5 exemplary works
- Chair's letter to Dean
- The grid of external assessors
- Letters of assessment from outside experts
- Teaching evaluations if any are available
- Other concurrences, and documents as customary for a department. These might include Section Chiefs' letters and reports of internal appointments committees.

27. Await the approval of the Provost (via the Dean or the Office of Academic Affairs). You may then inform successful applicants that their appointment has received final approval.

28. The department should follow all the WorkDay "Onboarding" steps to ensure all required forms are uploaded completely and correctly. See WorkDay Reference Guide. All required actions must be completed by the WordDay payroll deadline to guarantee a paycheck at the end of the month.