

UW-MILWAUKEE  
SEARCH & SCREEN DOCUMENT CHECKLIST

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**Faculty, Academic Staff, and Limited Appointments Recruitment/Hiring  
Documentation Checklist**

To ensure compliance with UW-Milwaukee and U.S. Department of Labor records retention requirements, information documenting recruitment and selection procedures must be retained for all hires. Materials for the successful candidate should be transferred to the personnel file, which will be retained permanently (in the department/division for 6 years past termination, then transferred to University Archives). Records documenting the search must be retained for a period of seven years from the date the position was filled and then destroyed (see: <http://www.uwm.edu/Libraries/arch/recordsmgmt/common.htm>).

NOTE: All applicant materials must be kept a minimum of two years in case of audit.

- \_\_\_\_\_ Vacancy Announcement
- \_\_\_\_\_ Form A -Request for Authorization to Recruit
- \_\_\_\_\_ PQ/PDQ if non-teaching Unclassified Position
- \_\_\_\_\_ Recruitment Efforts Plan (REP)
- \_\_\_\_\_ List of professional organizations/colleagues where nominations were solicited
- \_\_\_\_\_ Listing where position was announced (electronically or via paper)
- \_\_\_\_\_ List of Search and Screen Committee members/chair, if applicable, and/or individual/s making hiring decision
- \_\_\_\_\_ List of applicants/nominees
- \_\_\_\_\_ Sample letters sent to applicants
- \_\_\_\_\_ Applicant files, e.g., letters of application, resumes/vitae, transcripts, letters of recommendation, and specific correspondence with individual applicants and nominees
- \_\_\_\_\_ List of interviewees
- \_\_\_\_\_ Form B request to Interview
- \_\_\_\_\_ Evaluation of each candidate (including criteria used)
- \_\_\_\_\_ Interview questions
- \_\_\_\_\_ Form B request to Hire/Appointment Recommendation/Contract Approval Request Form (CARF)
- \_\_\_\_\_ Appointment/offer letter, including rejected letters of offer
- \_\_\_\_\_ Affirmative Action Review Form (AARF)/hire justification
- \_\_\_\_\_ Any personal notes related to the search process (retain for two years only)