

SuccessFactors Recruiting: Recruitment Advisor checklist

Note: This checklist must be used in conjunction with the [SuccessFactors Recruiting guide for Recruitment Advisors](#).

1	<p><u>Review job requisition before search meeting.</u></p> <ul style="list-style-type: none"> • Review internal and external adverts. • Check audit trail. • Review full job requisition, note anything to discuss at search meeting.
Search meeting	
2	<p><u>Approve job requisition after search meeting.</u></p> <ul style="list-style-type: none"> • Ensure org unit name is correct as this shows on job listing when advertised, it can't be changed after the requisition is approved. • <i>Requisition Team</i> section: <ul style="list-style-type: none"> – Ensure Recruitment Administrator appears in <i>Recruiting Team</i> field. – If they are voting members, the HR BP and Chairperson must be listed as <i>Selection Committee Members</i>. – If applicable, EE Rep should be listed in <i>Comments</i> at end. • If applicable, add candidate screening questions for extra information or candidate disqualification if requirements not met. • Review <i>Competencies</i> section. If applicable, replace <i>Overall Rating</i> with set of competencies based on position description document. • If applicable, edit the internal and external advert content. • Review attachments in the <i>Requisition Documents</i> section. • Approve job requisition.
3	
<p><u>Create job posting (advert).</u></p> <ul style="list-style-type: none"> • Select job requisition then <i>Job Postings</i> section. • Post internal advert in the <i>Intranet posting</i> line. • If applicable, post external advert in the <i>Corporate Posting</i> line. Note: every external advert must also be advertised internally so current UCT staff members are able to apply. • Ensure selection committee knows they will review and rate candidate applications on SuccessFactors. (see: Quick reference guide for committee members or Full guide for committee members) 	
Candidates apply.	
Selection committee review and rate candidate applications on SuccessFactors.	
4	<p><u>Run the Candidate list report</u> to review all selection committee ratings and comments.</p> <ul style="list-style-type: none"> • Choose <i>Home > Reporting</i>. • Click <i>Candidate list for selection committee (Servicing Officer)</i> report name. • In the <i>Actions</i> column, click  and choose <i>Edit</i>. • Select <i>By My Selection</i>, select the appropriate requisition number and click <i>OK</i>. • Click <i>Generate Report</i>. • Choose applicable download option and when finished, click <i>Return to Reports</i>.
5	<p><u>Add applicant ratings and change applicant status.</u></p> <ul style="list-style-type: none"> • Open the job requisition and display the list of applicants. • Select an applicant and select <i>Candidate Rating</i> (A, B, or C). • Click <i>Move</i> and select <i>Status</i> e.g. interview, retain, regret. • Repeat for each applicant.
	Recruitment Administrator attaches referee reports for shortlisted candidates.

6	<p><u>Change applicant status after initial rating and status change.</u></p> <p>Note: All applicants must first be rated, and their initial status changed (see step 5 above). This procedure is to change their status later on.</p> <ul style="list-style-type: none"> • Open the job requisition and display the list of applicants. • Select applicants using the checkboxes alongside the <i>Name</i> column and click <i>Move</i>. • In the <i>Move Applicants</i> dialogue box, select the status for all applicants. If <i>Regret</i> is chosen, select an appropriate <i>Sub-item</i>. Click <i>Move</i>. • In the <i>Summary</i> dialogue box, click <i>Close</i>.
	<p>Recruitment Administrator schedules interviews for any applicants with the <i>Interview</i> status.</p> <p>Selection committee members add interview feedback (interview ratings and indicate recommended candidate/s).</p>
7	<p><u>After interview/s, review all selection committee interview ratings and candidate recommendations.</u></p> <ul style="list-style-type: none"> • Open job requisition and choose <i>View Candidate Ratings</i>. • Use <i>Print Preview</i> to download a PDF copy.
	<p>If no recommended candidate, any unsuccessful candidates should have their status changed. Process could loop back to step 3 to advertise externally or re-advertise.</p>
8	<p><u>If recommended candidate, start the offer approval process.</u></p> <p>Note: If there are additional recommended candidates, do not move them to a regret status until the preferred candidate has formally accepted the offer.</p> <ul style="list-style-type: none"> • Open the job requisition and display the list of applicants. • Select recommended applicant and click <i>Move</i>. • In the <i>Move Applicants</i> dialogue box, ensure <i>Offer</i> status and <i>Offer Approval</i> sub-item are selected. Click <i>Move</i>. • In the <i>Summary</i> dialogue box, click <i>Close</i>. • Click  <i>Show More</i> and choose <i>Initiate Offer Approval</i>. • Complete and review the offer details, attach <i>Other Supporting Documents</i> (selection committee report and any other relevant documents) and select the required approvers.
9	<p><u>Monitor offer approvals.</u></p> <p>Note: There are no notifications for offer approvals, the Recruitment Advisor must monitor the process and inform each approver that their approval is required on SuccessFactors.</p> <ul style="list-style-type: none"> • Open the job requisition and display the list of applicants. • Select applicant with <i>Offer Approval</i> status. • Click  <i>Show More</i> and choose <i>Initiate Offer Approval</i>. • Review approval workflow and current approval status in the <i>Approvers: Version 1</i> section.
10	<p><u>Send offer letter when approvals are completed.</u></p> <ul style="list-style-type: none"> • Open the job requisition and display the list of applicants. • Select applicant with <i>Offer Approval</i> status and click <i>Move</i>. • In the <i>Move Applicants</i> dialogue box, ensure <i>Offer</i> status and <i>Offer Letter</i> sub-item are selected. Click <i>Move</i>. • In the <i>Summary</i> dialogue box, click <i>Close</i>. • Click  <i>Show More</i> and choose <i>Send Offer Letter</i>. • Review letter content, click <i>Next</i> and <i>Email as Text</i>. • Click <i>Send</i> and <i>I Have Finished</i>. • Inform Appointments Office to prepare formal letter of appointment.

11	<p><u>Change a candidate offer to accepted or declined</u></p> <p>The Appointments Office must confirm whether the candidate has accepted or declined the offer.</p> <ul style="list-style-type: none"> • Open the job requisition and display the list of applicants. • Select applicant with <i>Offer Letter</i> status and click <i>Move</i>. • In the <i>Move Applicants</i> dialogue box, select <i>Offer Accepted</i> or <i>Offer Declined</i> in the <i>Sub-item</i> field. Click <i>Move</i>. • In the <i>Summary</i> dialogue box, click <i>Close</i>.
12	<p><u>Change candidate status after offer acceptance</u></p> <ul style="list-style-type: none"> • Open the job requisition and display the list of applicants. • Select applicant with <i>Offer Accepted</i> status and click <i>Move</i>. • In the <i>Move Applicants</i> dialogue box, ensure the <i>Ready to Hire</i> status is selected. Click <i>Move</i>. • In the <i>Summary</i> dialogue box, click <i>Close</i>. Note: The requisition is automatically closed.
13	<p><u>Final change of candidate status to hired</u></p> <ul style="list-style-type: none"> • Open the job requisition and display the list of applicants. • Select applicant with <i>Ready to Hire</i> status and click <i>Move</i>. • In the <i>Move Applicants</i> dialogue box, ensure the <i>Hired</i> status is selected. Click <i>Move</i>. • In the <i>Summary</i> dialogue box, click <i>Close</i>.