SuccessFactors Recruiting: Recruitment Advisor checklist

Note: This checklist must be used in conjunction with the SuccessFactors Recruiting guide for Recruitment Advisors.

1 Review job requisition before search meeting.

- Review internal and external adverts.
- Check audit trail.
- Review full job requisition, note anything to discuss at search meeting.

Search meeting

2 Approve job requisition after search meeting.

- Ensure org unit name is correct as this shows on job listing when advertised, it can't be changed after the requisition is approved.
- Requisition Team section:
 - Ensure Recruitment Administrator appears in Recruiting Team field.
 - If they are voting members, the HR BP and Chairperson must be listed as Selection Committee Members.
 - If applicable, EE Rep should be listed in *Comments* at end.
- If applicable, add candidate screening questions for extra information or candidate disqualification if requirements not met.
- Review *Competencies* section. If applicable, replace *Overall Rating* with set of competencies based on position description document.
- If applicable, edit the internal and external advert content.
- Review attachments in the *Requisition Documents* section.
- Approve job requisition.

3 Create job posting (advert).

- Select job requisition then Job Postings section.
- Post internal advert in the *Intranet posting* line.
- If applicable, post external advert in the *Corporate Posting* 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 Run the Candidate list report to review all selection committee ratings and comments.
 - Choose Home > Reporting.
 - Click Candidate list for selection committee (Servicing Officer) report name.
 - In the Actions column, click d and choose Edit.
 - Select By My Selection, select the appropriate requisition number and click OK.
 - Click Generate Report.
 - Choose applicable download option and when finished, click *Return to Reports*.

5 Add applicant ratings and change applicant status.

- Open the job requisition and display the list of applicants.
- Select an applicant and select *Candidate Rating* (A, B, O, D if standard mandate or A, B, C if open mandate).
- Click *Move* and select *Status* e.g. interview, retain, regret.
- Repeat for each applicant.

Recruitment Administrator attaches referee reports for shortlisted candidates.

6 Change applicant status after initial rating and status change.

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.

- Open the job requisition and display the list of applicants.
- Select applicants using the checkboxes alongside the Name column and click Move.
- In the *Move Applicants* dialogue box, select the status for all applicants. If *Regret* is chosen, select an appropriate *Sub-item*. Click *Move*.
- In the Summary dialogue box, click Close.

Recruitment Administrator schedules interviews for any applicants with the Interview status.

Selection committee members add interview feedback (interview ratings and indicate recommended candidate/s).

7 After interview/s, review all selection committee interview ratings and candidate recommendations.

- Open job requisition and choose View Candidate Ratings.
- Use Print Preview to download a PDF copy.

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.

8 If recommended candidate, start the offer approval process.

Note: If there are additional recommended candidates, do not move them to a regret status until the preferred candidate has formally accepted the offer.

- Open the job requisition and display the list of applicants.
- Select recommended applicant and click Move.
- In the *Move Applicants* dialogue box, ensure *Offer* status and *Offer Approval* sub-item are selected. Click *Move*.
- In the Summary dialogue box, click Close.
- Click Show More and choose Initiate Offer Approval.
- Complete and review the offer details, attach *Other Supporting Documents* (selection committee report and any other relevant documents) and select the required approvers.

9 Monitor offer approvals.

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.

- Open the job requisition and display the list of applicants.
- Select applicant with Offer Approval status.
- Click ••• Show More and choose Initiate Offer Approval.
- Review approval workflow and current approval status in the *Approvers: Version 1* section.

10 Send offer letter when approvals are completed.

- Open the job requisition and display the list of applicants.
- Select applicant with Offer Approval status and click Move.
- In the *Move Applicants* dialogue box, ensure *Offer* status and *Offer Letter* sub-item are selected. Click *Move*.
- In the Summary dialogue box, click Close.
- Click Show More and choose Send Offer Letter.
- Review letter content, click Next and Email as Text.
- Click Send and I Have Finished.
- Inform Appointments Office to prepare formal letter of appointment.

11 Change a candidate offer to accepted or declined

The Appointments Office must confirm whether the candidate has accepted or declined the offer.

- Open the job requisition and display the list of applicants.
- Select applicant with Offer Letter status and click Move.
- In the Move Applicants dialogue box, select Offer Accepted or Offer Declined in the Sub-item field. Click Move.
- In the Summary dialogue box, click Close.

12 Change candidate status after offer acceptance

- Open the job requisition and display the list of applicants.
- Select applicant with Offer Accepted status and click Move.
- In the Move Applicants dialogue box, ensure the Ready to Hire status is selected. Click Move.
- In the Summary dialogue box, click Close. Note: The requisition is automatically closed.

13 Final change of candidate status to hired

- Open the job requisition and display the list of applicants.
- Select applicant with Ready to Hire status and click Move.
- In the Move Applicants dialogue box, ensure the Hired status is selected. Click Move.
- In the Summary dialogue box, click Close.