


SuccessFactors Recruiting: Recruitment Advisor checklist

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

| | |
|--|--|
| 1 | <p>Review job requisition before search meeting.</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>Approve job requisition after search meeting.</p> <ul style="list-style-type: none"> • <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 info or 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>Create job posting (advert).</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: UCT SuccessFactors Recruiting guide for selection committee members) |
| Candidates apply. | |
| Selection committee review and rate candidate applications on SuccessFactors. | |
| 4 | <p>Run the Candidate list report 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>Add candidate ratings and change candidate status.</p> <ul style="list-style-type: none"> • Open the job requisition and display the candidate summary. • Select a candidate, select committee rating (A, B, O, D if standard mandate or A, B, C if open mandate) and select status e.g. 1st interview, shortlisted, reject pre-interview. • Save and repeat for each candidate. |
| Recruitment Administrator attaches referee reports for shortlisted candidates. | |

| | |
|---|--|
| 6 | <p>Change candidate status after shortlisting.</p> <p>Note: All candidates must first be rated, and their initial status changed (see step 5 above). This procedure is to move them later in the talent pipeline.</p> <ul style="list-style-type: none"> • Open the job requisition and display the candidate summary. • Either change status for multiple candidates by selecting the group and choosing <i>Action > Move Candidate</i> (all candidates move to same status) • Or select a single candidate and change their status on the candidate profile page. |
| Recruitment Administrator schedules interviews for any candidates with 1 st interview or 2 nd interview status. | |
| Selection committee members add candidate interview feedback (interview ratings and indicate recommended candidate/s). | |
| 7 | <p>After interview/s, review all selection committee interview ratings and candidate recommendations.</p> <ul style="list-style-type: none"> • Open job requisition and choose <i>View Candidate Ratings</i>. • If required, use <i>Print Preview</i> to download a PDF copy. |
| If no recommended candidate, any unsuccessful candidates should be moved to relevant place in the talent pipeline. Process could loop back to step 3 to advertise externally or re-advertise. | |
| 8 | <p>If recommended candidate, start the offer approval process.</p> <p>Note: If there are additional recommended candidates, do not move them to a rejected status until the preferred candidate has formally accepted the offer.</p> <ul style="list-style-type: none"> • Open the job requisition and display the candidate summary. • Select recommended candidate. • Change <i>Candidate Status</i> to <i>Offer</i> and the field below to <i>Offer Approval</i>, save and complete <i>Take Action > Offer > 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>Monitor offer approvals.</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 candidate summary. • Select candidate with <i>Offer Approval</i> status. • Choose <i>Take Action > Offer > Offer Approval</i>. • Review approval workflow and current approval status in the <i>Approvers: Version 1</i> section. |
| 10 | <p>Send offer letter when approvals are completed.</p> <ul style="list-style-type: none"> • Open the job requisition and display the candidate summary. • Select candidate with <i>Offer Approval</i> status. • Change second <i>Candidate Status</i> field (below <i>Offer</i>) to <i>Offer Letter</i>, save and complete <i>Take Action > Offer > Offer Letter</i>. • Review letter content, click <i>Next Step, Save Offer Letter</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>Change a candidate offer to accepted or declined</p> <ul style="list-style-type: none"> • Open the job requisition and display the candidate summary. • Select candidate with <i>Offer Letter</i> status. • Change second <i>Candidate Status</i> field (below <i>Offer</i>) to <i>Offer Accepted</i> or <i>Offer Declined</i> and save. |

| | |
|----|--|
| 12 | <p><u>Change candidate status after offer acceptance</u></p> <ul style="list-style-type: none">• Open the job requisition and display the candidate summary.• Select candidate with <i>Offer Accepted</i> status.• Change <i>Candidate Status</i> to <i>Ready to Hire</i>.• Click <i>Save</i> and <i>OK</i>. |
| 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 candidate summary.• Select candidate with <i>Ready to Hire</i> status.• Change <i>Candidate Status</i> to <i>Hired</i> and save. |