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]**.

- *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 info or disqualification if requirements not met.
- Review 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: [UCT SuccessFactors Recruiting guide for selection 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 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 candidate ratings and change candidate status]**.

- 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	**Change candidate status after shortlisting.** **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. • Open the job requisition and display the candidate summary. • Either change status for multiple candidates by selecting the group and choosing *Action > Move Candidate* (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 1st interview or 2nd interview status.
	Selection committee members add candidate interview feedback (competency ratings and indicate recommended candidate/s).
7	**After interview/s, review all selection committee competency ratings and recommended candidate/s.** • Open job requisition and choose *View Candidate Ratings*. • If required, use *Print Preview* 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	**If recommended candidate, start the offer approval process.** **Note**: If there are additional recommended candidates, do not move them to a rejected status until the preferred candidate has formally accepted the offer. • Open the job requisition and display the candidate summary. • Select recommended candidate. • Change *Candidate Status* to *Offer* and the field below to *Offer Approval*, save and complete *Take Action > Offer > 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 candidate summary. • Select candidate with *Offer Approval* status. • Choose *Take Action > Offer > 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 candidate summary. • Select candidate with *Offer Approval* status. • Change second *Candidate Status* field (below *Offer*) to *Offer Letter*, save and complete *Take Action > Offer > Offer Letter*. • Review letter content, click *Next Step*, *Save Offer Letter* 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** • Open the job requisition and display the candidate summary. • Select candidate with *Offer Letter* status. • Change second *Candidate Status* field (below *Offer*) to *Offer Accepted* or *Offer Declined* and save.

12	**Change candidate status after offer acceptance** • Open the job requisition and display the candidate summary. • Select candidate with *Offer Accepted* status. • Change *Candidate Status* to *Ready to Hire*. • Click *Save* and *OK*.
13	**Final change of candidate status to hired** • Open the job requisition and display the candidate summary. • Select candidate with *Ready to Hire* status. • Change *Candidate Status* to *Hired* and save.