





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 applicant ratings and change applicant status.</p> <ul style="list-style-type: none"> Open the job requisition and display the candidate summary. Select an applicant and select <i>Candidate Rating</i> (A, B, O, D if standard mandate or A, B, C if open mandate). 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 candidate summary. • 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>.
Recruitment Administrator schedules interviews for any candidates with the <i>Interview</i> status.	
Selection committee members add interview feedback (interview ratings and indicate recommended candidate/s).	
7	<p>After interview/s, <u>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>. • 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, <u>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 candidate summary. • 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>More Actions</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 candidate summary. • Select applicant with <i>Offer Approval</i> status. • Click  <i>More Actions</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 candidate summary. • 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>More Actions</i> and choose <i>Send Offer Letter</i>. • Review letter content, click <i>Next Step</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 candidate summary. • 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 candidate summary. • 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 candidate summary. • 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>.