


## SuccessFactors Recruiting: Recruitment Advisor checklist

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

1	<p><b><a href="#">Review job requisition before search meeting.</a></b></p> <ul style="list-style-type: none"> <li>Review internal and external adverts.</li> <li>Check audit trail.</li> <li>Review full job requisition, note anything to discuss at search meeting.</li> </ul>
Search meeting	
2	<p><b><a href="#">Approve job requisition after search meeting.</a></b></p> <ul style="list-style-type: none"> <li><i>Requisition Team</i> section: <ul style="list-style-type: none"> <li>Ensure Recruitment Administrator appears in <i>Recruiting Team</i> field.</li> <li>If they are voting members, the HR BP and Chairperson must be listed as <i>Selection Committee Members</i>.</li> <li>If applicable, EE Rep should be listed in <i>Comments</i> at end.</li> </ul> </li> <li>If applicable, add candidate screening questions for extra info or disqualification if requirements not met.</li> <li>Review competencies (based on position description document).</li> <li>If applicable, edit the internal and external advert content.</li> <li>Review attachments in the <i>Requisition Documents</i> section.</li> <li>Approve job requisition.</li> </ul>
3	<p><b><a href="#">Create job posting (advert).</a></b></p> <ul style="list-style-type: none"> <li>Select job requisition then <i>Job Postings</i> section.</li> <li>Post internal advert in the <i>Intranet posting</i> line.</li> <li>If applicable, post external advert in the <i>Corporate Posting</i> line. <b>Note:</b> every external advert must also be advertised internally so current UCT staff members are able to apply.</li> <li>Ensure selection committee knows they will review and rate candidate applications on SuccessFactors. (see: <a href="#">UCT SuccessFactors Recruiting guide for selection committee members</a>)</li> </ul>
Candidates apply.	
Selection committee review and rate candidate applications on SuccessFactors.	
4	<p><b><a href="#">Run the Candidate list report</a></b> to review all selection committee ratings and comments.</p> <ul style="list-style-type: none"> <li>Choose <i>Home &gt; Reporting</i>.</li> <li>Click <i>Candidate list for selection committee (Servicing Officer)</i> report name.</li> <li>In the <i>Actions</i> column, click  and choose <i>Edit</i>.</li> <li>Select <i>By My Selection</i>, select the appropriate requisition number and click <i>OK</i>.</li> <li>Click <i>Generate Report</i>.</li> <li>Choose applicable download option and when finished, click <i>Return to Reports</i>.</li> </ul>
5	<p><b><a href="#">Add candidate ratings and change candidate status.</a></b></p> <ul style="list-style-type: none"> <li>Open the job requisition and display the candidate summary.</li> <li>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. 1<sup>st</sup> interview, shortlisted, reject pre-interview.</li> <li>Save and repeat for each candidate.</li> </ul>
Recruitment Administrator attaches referee reports for shortlisted candidates.	

6	<p><b><u>Change candidate status after shortlisting.</u></b></p> <p><b>Note:</b> 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"> <li>• Open the job requisition and display the candidate summary.</li> <li>• Either change status for multiple candidates by selecting the group and choosing <i>Action &gt; Move Candidate</i> (all candidates move to same status)</li> <li>• Or select a single candidate and change their status on the candidate profile page.</li> </ul>
Recruitment Administrator schedules interviews for any candidates with 1 <sup>st</sup> interview or 2 <sup>nd</sup> interview status.	
Selection committee members add candidate interview feedback (competency ratings and indicate recommended candidate/s).	
7	<p><b>After interview/s, <u>review all selection committee competency ratings and recommended candidate/s.</u></b></p> <ul style="list-style-type: none"> <li>• Open job requisition and choose <i>View Candidate Ratings</i>.</li> <li>• If required, use <i>Print Preview</i> to download a PDF copy.</li> </ul>
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><b>If recommended candidate, <u>start the offer approval process.</u></b></p> <p><b>Note:</b> 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"> <li>• Open the job requisition and display the candidate summary.</li> <li>• Select recommended candidate.</li> <li>• Change <i>Candidate Status</i> to <i>Offer</i> and the field below to <i>Offer Approval</i>, save and complete <i>Take Action &gt; Offer &gt; Offer Approval</i>.</li> <li>• 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.</li> </ul>
9	<p><b><u>Monitor offer approvals.</u></b></p> <p><b>Note:</b> 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"> <li>• Open the job requisition and display the candidate summary.</li> <li>• Select candidate with <i>Offer Approval</i> status.</li> <li>• Choose <i>Take Action &gt; Offer &gt; Offer Approval</i>.</li> <li>• Review approval workflow and current approval status in the <i>Approvers: Version 1</i> section.</li> </ul>
10	<p><b><u>Send offer letter when approvals are completed.</u></b></p> <ul style="list-style-type: none"> <li>• Open the job requisition and display the candidate summary.</li> <li>• Select candidate with <i>Offer Approval</i> status.</li> <li>• Change second <i>Candidate Status</i> field (below <i>Offer</i>) to <i>Offer Letter</i>, save and complete <i>Take Action &gt; Offer &gt; Offer Letter</i>.</li> <li>• Review letter content, click <i>Next Step, Save Offer Letter</i> and <i>Email as Text</i>.</li> <li>• Click <i>Send</i> and <i>I Have Finished</i>.</li> <li>• Inform Appointments Office to prepare formal letter of appointment.</li> </ul>
11	<p><b><u>Change a candidate offer to accepted or declined</u></b></p> <ul style="list-style-type: none"> <li>• Open the job requisition and display the candidate summary.</li> <li>• Select candidate with <i>Offer Letter</i> status.</li> <li>• Change second <i>Candidate Status</i> field (below <i>Offer</i>) to <i>Offer Accepted</i> or <i>Offer Declined</i> and save.</li> </ul>

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