

SuccessFactors Recruiting: Recruitment Advisor checklist

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

1	<p><u>Review job requisition before search meeting.</u></p> <ul style="list-style-type: none"> • Check approval chain and audit trail. • Review full job requisition, note anything to discuss at search meeting.
Search meeting	
2	<p><u>Approve job requisition after search meeting.</u></p> <ul style="list-style-type: none"> • Ensure EE mandate is correct. • Ensure Recruitment Administrator is correct. • Ensure Final Approver is correct. • If voting members, Final Approver and HR BP must be listed as <i>Selection Committee Members</i>. • If applicable, add applicant screening questions for extra info or disqualification if requirements not met. • Add competencies based on position description document. • Add internal and external advert. • Review position description document. • Approve job requisition.
3	<p><u>Create job posting (advert).</u></p> <ul style="list-style-type: none"> • Select job requisition then <i>Job Postings</i> section. • Intranet posting for internal advert. • If applicable, corporate posting for external advert. Note: every external job 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><u>Add candidate ratings (A, B, O, D) and change candidate status.</u></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) 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.	
5	<p><u>Change candidate status after shortlisting.</u></p> <p>Note: All candidates must first be rated, and their initial status changed (see step 4 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 application/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 (competency ratings and indicate recommended candidate/s).	

6	<p>After interview/s, review all selection committee competency ratings and recommended candidate/s.</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.
<p>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.</p>	
7	<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 the offer details, including attaching the selection committee report and selecting the required approvers.
8	<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.
9	<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</i>, <i>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.
10	<p>Change a candidate offer to accepted (background checks) 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>Background Checks</i> or <i>Offer Declined</i> and save.
11	<p>Change candidate status after background checks</p> <ul style="list-style-type: none"> • Open the job requisition and display the candidate summary. • Select candidate with <i>Background Checks</i> status. • If background checks passed: Change <i>Candidate Status</i> to <i>Ready to Hire</i>, set <i>Background Check Status</i> select <i>Passed</i> and save. • If background checks failed: Change <i>Candidate Status</i> to <i>Reject – No Email</i>, set <i>Background Check Status</i> to <i>Failed</i> and save.
12	<p>Final change of candidate status to hired</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.