Overview:

The Applicant Management process within SuccessFactors is an efficient, robust means of managing applicant flow, coordinating interviews, evaluating candidates, and extending the offer to the top finalist.

Prior to using Part 3 of the Applicant Management process:
- Candidates have been interviewed and evaluations submitted
- Finalists have been chosen based on evaluations and collaboration of Hiring Coordinator and Position Manager (with Search Committee input, if applicable)
- The top finalist has been selected to receive an offer of employment

Selecting Finalists

1. Log into SuccessFactors.
   - Navigate to the SuccessFactors website and click on the SuccessFactors portal button.
   - The SuccessFactors Log In screen will appear. Enter your Username (6+2) and Password (same as you use for email and UCFlex), and click [LOG IN].

2. The default page upon login is the Home screen. On the Home screen, click Home and select Recruiting.

3. To access applicants for a position, look under the Candidates column on the Requisitions page.
   - Click the [#] under candidates to open the Candidate Summary for that position.
4. The Talent Acquisition team recommends choosing 2-3 finalists in the event that the top finalist does not accept the offer.
   a. From candidates in 1st Interview or Additional Interview status, choose 2-3 as finalists and move to Finalist status.
   b. Drag-and-drop by grabbing the “domino” to left of name and dropping the name into the Finalist status in the Talent Pipeline.
   c. Status may also be changed within the Resume Viewer (see Applicant Management Part 1 Quick Reference Guide).
   d. All remaining candidates should be removed from consideration, utilizing the reasons at the far right of the Talent Pipeline. The Talent Acquisition team will audit the statuses of candidates to ensure they have been properly disqualified or removed from consideration.

Offer Approval Request

1. To request approval to extend an offer to your top candidate, move the candidate into Offer status in the Talent Pipeline.
   a. Drag-and-drop candidate from Finalist to Offer.

2. From the pop-up window click [APPLY UPDATES].

NOTE: When 2-3 finalists are chosen, contact your Recruiter to have the position removed from job boards and the UC website. This will prevent further candidates from applying when you are at the Finalist stage.
3. A new icon will appear on the candidate’s application to reflect they’re in Offer status.

4. Click the drop-down arrow next to Offer for options; click [OFFER APPROVAL].

5. The Offer Approval screen will open. The title reflects the candidate’s name and the position they are being offered.
   a. Click the drop-down by Select Offer Template to choose the appropriate template: Staff and Faculty or Student/Term Adjunct.

6. The Approvers section will adjust based on the template selected.
   a. For Staff and Faculty Offer Approval Template, the approvers will pre-populate based on what was entered in the Approver section of the Requisition.
   b. For Student and Term Adjunct Offer Approval Template, you will need to enter the approver, which may be yourself, if appropriate. Begin typing in the field and the system will search users as you type. You may add multiple approvers as needed.
Completing the Offer Approval Request Details

1. Review the Offer Details, making edits and adding information as appropriate.

2. Position Number and Title come from UCFlex and should not be changed.

3. The Candidate’s Name is populated from the application and should not be changed. If the candidate did not enter their legal name and it needs to be updated, they can edit their application to reflect the changes.
   - The candidate’s name is fed to UCFlex from his/her application. If the formatting or spelling is incorrect, changing here will not impact that. Those changes will need to be made after the hire is processed.

4. Enter the Start Date and Contract percentage. Actual FTE% comes from Requisition and should not be changed. If the FTE is incorrect, the Hiring Coordinator will need to submit a “Maintain PCR” once the employee is hired.

5. If Compensation has approved an Advanced Starting Salary, choose “Yes” here.

6. Planned Compensation comes from UCFlex and should not be changed. If the amount is incorrect, the Hiring Coordinator will need to submit a “Maintain PCR” once the employee is hired.

7. Enter Annual Salary for employees who will be paid monthly. Enter Hourly Rate if employee will be paid bi-weekly. (Enter one or the other; do not fill in both fields.)

8. Add the Work Schedule Rule, if applicable.

9. If needed for reference, you may view the candidate’s resume with the Candidate Quick View.

10. Fill in the College CEEB Code, using information in the candidate’s resume (#9) if needed.
• Click the blue bubble to access the link to look up the CEEB code.

NOTE: The CEEB code is required for Faculty positions. Failure to complete this field will result in your offer approval being declined.

11. If input into application, College/University, Degree, Graduation Year, and Area of Study will auto-populate. If not, add these based on candidate’s resume (#9), if available.

12. Select whether this position is a Main Assignment.

13. Choose the Action Type from the drop-down menu.

14. The Reason for Action drop-down options will change based on your selection in #6k.

15. If candidate will be receiving tenure, fill out applicable information.

Approval of Request

The SVP/VP Approver will receive notification via email that an Offer Approval is awaiting their review.

• The SVP/VP Approver does not have the ability to edit the information in the Offer Approval Request form. If there are any edits to be made or discrepancies, the Approver will decline the request and the Hiring Coordinator will receive an email directing them to make edits and resubmit for approval.

Creating a Contingent Offer Letter

Once the Offer has been approved by the SVP/VP Approver, you may create a Contingent Offer Letter for your candidate.

1. Open the list of applicants following steps #1-3 on page 1.

2. Drag-and-drop the candidate into Offer on the Talent Pipeline.

3. Choose Offer Letter from the drop-down menu in the pop-up box.

• Add any comments if desired.

4. Click [APPLY UPDATES].

5. Click the candidate’s name in the Job Requisitions screen to open the application.
6. Choose Offer Letter from the Offer drop down menu within the application.

7. The Offer Letter template will open.
   a. Choose the appropriate template from the drop-down menu.
   b. The Subject defaults to “Offer of Employment” but is editable.
      c. Based on the template chosen, the pre-approved verbiage will appear in the editing box.
      d. Items highlighted in [yellow] will pre-fill based on information entered in the Requisition or the candidate’s application.
      e. Items in red need to be edited by you.

8. If you need to attach any documents to your offer letter, such as checklists for Classified positions or addendums, click the [ATTACH A DOCUMENT] button at the bottom left of the Offer Letter page.

9. When all red fields have been edited, click the [NEXT STEP] button at the bottom of the letter to review the Offer Letter.
Sending the Contingent Offer Letter

The print preview screen opens with five options along the top of the screen.

1. **Email as PDF attachment**: attaches the offer letter as a PDF to an email to the candidate. This will require the candidate to print and sign the PDF to accept the offer and send it back. This could delay the process, and is not recommended.

2. **Email as text**: sends the letter in plain text, without the UC logo and formatting. This option is not secure from editing, and therefore not recommended.

3. **Print**: if you wish to review a hard copy, utilize this option to print a copy of the offer.

4. **Verbal Offer**: if you extended a verbal offer to the candidate before sending this letter, you may log the verbal offer by clicking this button. The option to record a Verbal Offer will be grayed out and the screen will reflect the Verbal Offer as recorded.

5. **Online Offer** (recommended): notifies the candidate via email of the offer, prompting him/her to log into SuccessFactors to accept the offer. (The candidate may also download the PDF version of the letter within their online SuccessFactors profile to review if desired.)
   a. Choose **Online Offer Letter Email Template** from the drop-down menu of templates.
   b. Items in red need to be edited by the Hiring Coordinator. Fields in [[ ]] will auto-populate from the requisition and candidate application.
   c. When all red fields have been edited, click [NEXT] at the bottom right of the screen.
   d. Preview the email to the candidate. To make changes click [BACK]. Once you have verified accuracy, click [SEND].

**NOTE**: If your candidate is internal, please note that there is a template specifically for internal candidates, entitled “Online Offer Letter – Internal Finalist” template.

A few additional notes about the Online Offer:
- The candidate must accept the offer online within 48 hours or it must be re-sent.
• If the candidate accepts the offer, the Hiring Coordinator is notified via email. Additionally, the Hiring Coordinator can view the candidate’s status on the application.
• The candidate may also decline the offer, adding comments for the recruiter. The Hiring Coordinator is notified via email that the offer has been declined.

**After the Offer Letter**

After the Offer Letter is accepted by the candidate, there are a few more steps to complete the hiring process:

1. Drag-and-drop to move the candidate into **Offer Accepted** status.
   • This will prompt an email to the candidate requesting additional information (“Stage 2” of the application process).
   • The candidate will log in to their SuccessFactors online profile and edit their application to add their Social Security number, Date of Birth, Emergency Contact information, and answer additional voluntary self-identification questions.

2. After the candidate completes Stage 2 of their application, if the position requires a background check to be completed, follow these steps:
   a. Drag and drop to move the candidate into **Pre-Employment Screening** status.
   b. Order a background check on the candidate via HireRight. (See the HireRight Background Check Quick Reference Guide for more information.)

3. Once the background check results are received, your recruiter will adjudicate the results and if everything clears, the recruiter will move the candidate into **Send to UCFlex for hire completion** status.
   • If the background check does not clear, your recruiter will contact you to discuss next steps.