# Table of Contents

When viewing electronically, click a section header below to skip directly to that section of the Reference Guide.

- Overview: Moving and Viewing Candidates (Part 1) ................................................................. 3
- Accessing Candidates ................................................................................................................. 3
- Talent Pipeline ........................................................................................................................... 5
- Reviewing and Moving Multiple Candidates ............................................................................. 5
- Reviewing and Moving Individual Candidates ........................................................................... 6
- Disqualifying & Removing Candidates from Consideration ..................................................... 7
- Candidate Application View ...................................................................................................... 8
- Appendix: Differences in Talent Pipelines Per Requisition ...................................................... 10
- Overview: Setting Up Interviews & Viewing Ratings (Part 2) .................................................. 11
- Setting Up Candidate Interviews ............................................................................................... 12
- Viewing Applicant Ratings ........................................................................................................ 14
- Overview: Offer Approval & Offer Letter (Part 3) .................................................................... 16
- Selecting Finalists: ..................................................................................................................... 16
- Offer Approval Request ............................................................................................................. 17
- Completing the Offer Approval Request Details ...................................................................... 19
- Approval of Request .................................................................................................................. 20
- Creating a Contingent Offer Letter ........................................................................................... 21
- Sending the Contingent Offer Letter ......................................................................................... 22
- Checking the Contingent Offer Letter ....................................................................................... 23
- After the Offer Letter ................................................................................................................. 24
Overview: Moving and Viewing Candidates (Part 1)

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 the Part 1 of the Applicant Management process:
- The Job Requisition must be completed and approved.
- The HR Recruiter has posted the position.
- Applicants have applied for the position.

Accessing Candidates

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 UC Username 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. The Job Requisitions page will display. This screen provides an overview of all of your requisitions and includes the following:
   a. A snapshot of the number of candidates and requisitions.
   b. The list of requisitions, as well information chosen via Filter and Display options (#4).
   c. The number of items per page: the default is 10 and it can be changed to display more. Some requisitions will fall onto subsequent pages.
4. To change which columns and data display, hover over the gear icon and choose **Filter Options** or **Display Options**.

5. The **Candidates** column on the Requisitions page provides access to candidates:
   a. The number in **blue** represents the total number of Candidates who have applied for the position.
   b. The number in parentheses and **orange** displays the number of New Candidates

6. Click the number under the Candidates column to open the **Candidate Summary** for the corresponding position.

7. The **Candidate Summary** provides a snap shot for each position, including:
   a. **Requisition Title**: the title of the position being hired (populated from UCFlex).
   b. **Position Manager name**: the manager who will supervise this candidate (populated from UCFlex).
   c. **Talent Pipeline**: provides a snapshot of how many candidates are at each status within the Recruitment process (see the “Talent Pipeline” section for more information).
   d. **Name**: displays the first and last name of each candidate.
   e. **Status**: displays the candidate’s current status in the recruiting process.
   f. **Rating**: displays the candidate’s rating if you chose to score and weight the application questions when completing the requisition.
   g. **Source**: where the candidate applied for the job (i.e. job board, UC website, etc).
   h. **Candidate Source**: provides further details as to the Source above (i.e. “CareerBuilder” if “job board” was listed in #7g).
Talent Pipeline

Below is an overview of an Unclassified Talent Pipeline:

1. When candidates apply, they will show up under New.
2. As you review candidates, those who meet minimum qualifications must be moved to Application Review. Once this step is complete, the applicant will receive an email that his/her application is being reviewed, and will also be able to see this status in his/her profile.
3. If you are using a Search Committee, those candidates who you wish the Search Committee to consider will be moved to Search Committee Review after they’ve been placed in Application Review.
   - For each candidate that you move into this status, the Search Committee chair and members will receive a notification email that there are candidates for them to review.
   - If you wish to phone screen the candidate prior to sending to the Search Committee, you may move them to Phone Screen and then back to Search Committee Review.
4. Those you are screening via phone will be moved to Phone Screen for the next step.
5. Candidates may also be moved straight to 1st Interview if a Phone Screen is not needed.

Reviewing and Moving Multiple Candidates

To review and move multiple candidates:
1. Click the check box next to all candidates you wish to review. To select all, click the box to the left of “Name”.
2. Hover over the down arrow by Action to pop open a menu of options and choose View Resume.
3. The **Resume Viewer** opens and displays the resumes for all candidates.

4. Scroll through candidate resumes using the arrows as indicated.

5. You can immediately move candidates to a new status or disqualify them while reviewing resumes.

6. When you are finished reviewing resumes, click **[CLOSE]**.

---

### Reviewing and Moving Individual Candidates

To review and move *single candidates*, you may use the same process as above, or:

1. Click the candidate’s name to open his/her profile and application.

2. View the resume by clicking the **Resume** button at the top right of the application.

3. To move candidate to a new status or disqualify the candidate, click the “domino” to the left of the name, and drag-and-drop to the new status in the **Talent Pipeline**.
Disqualifying & Removing Candidates from Consideration

When reviewing candidates, you have two options for candidates who do not meet minimum qualifications or for whom you choose to not move forward in the process:

- **Disqualify** or disposition the candidate
- **Remove from consideration**: To exclude the candidate from immediate consideration, but add the applicant to a secondary pool of candidates for potential review in the future.

It is recommended that you complete this action as you go, rather than returning to the candidate list at a later time.

**Remove from Consideration:**

1. Click **[REMOVED FROM CONSIDERATION]** at the bottom of the candidate’s application.
   
   a. This will highlight the candidate with a *pink shade* in the candidate summary.
   
   b. The candidate remains in the *same status* as they were when you removed them from consideration. **They are not disqualified.**
   
   c. If the secondary pool is needed, you can add the candidate back into consideration by opening the application and clicking **[REOPEN FOR CONSIDERATION]** at the bottom of their application. The pink shade will disappear and you may move them to the next status within the **Talent Pipeline**.

**NOTE:** Statuses in the Talent Pipeline with a red asterisk (*) are required stops. Candidates may not be moved to a status beyond these stops without first being put in these statuses.

*Example:* The **Application Review** and 1*st* Interview in this Talent Pipeline is required. The candidate cannot be moved to a **Finalist** status without going through the 1*st* Interview.

**NOTE:** Removing a candidate from consideration will NOT disqualify the candidate, nor will it change their status in the Talent Pipeline.

---

**Table: Statuses in Talent Pipeline**

<table>
<thead>
<tr>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Name: Wilma Flintstone</td>
</tr>
<tr>
<td></td>
<td>Type: Offer Approval Request</td>
</tr>
<tr>
<td></td>
<td>Name: Fiyona Owings</td>
</tr>
<tr>
<td></td>
<td>Type: Offer Accepted</td>
</tr>
<tr>
<td></td>
<td>Name: Thomas Freshman</td>
</tr>
<tr>
<td></td>
<td>Type: Offer Accepted</td>
</tr>
<tr>
<td></td>
<td>Name: Rebecca Hoffman</td>
</tr>
<tr>
<td></td>
<td>Type: Application Review</td>
</tr>
<tr>
<td></td>
<td>Name: Ken Jodrey</td>
</tr>
<tr>
<td></td>
<td>Type: Offer Accepted</td>
</tr>
<tr>
<td></td>
<td>Name: Guru Yogi</td>
</tr>
<tr>
<td></td>
<td>Type: New</td>
</tr>
<tr>
<td></td>
<td>Name: Evelyn Keenan</td>
</tr>
<tr>
<td></td>
<td>Type: Offer Accepted</td>
</tr>
<tr>
<td></td>
<td>Name: Angela Sidlena</td>
</tr>
</tbody>
</table>

**NOTE:** statuses in the Talent Pipeline with a red asterisk (*) are required stops. Candidates may not be moved to a status beyond these stops without first being put in these statuses.
Disqualify (Disposition):

2. If you wish to immediately disqualify applicants, or do not need the applicants that have been placed in the secondary pool, utilize one of the pre-set reasons at the end of the Talent Pipeline to disqualify the candidate(s).

Candidates may be moved to a disqualified or excluded status using the steps outlined in the “Reviewing and Moving Multiple Candidates” section, or the “Reviewing and Moving Individual Candidates” section.

Candidate Application View

1. Click [APPLICANT’S NAME] to view the application and the screen below will open for the candidate (see “Moving Candidates: Single” on page 4).

   a) Click this arrow to change to a full screen view.
   b) Print Application Detail: opens a pop-up window to review entire application in one screen.
   c) Email: allows you to email the candidate utilizing templates and tracks the correspondence within the “Correspondence” section on the right side of the application. This is the recommended method of corresponding via email with the candidate instead of using Outlook, which will not track the correspondence within the system.

NOTE: When an applicant is viewed by any user, the applicant will no longer show as “New” in this manner: although the candidate will remain in the New status in the Talent Pipeline until moved or disqualified.
d) **Create Meeting:** opens Outlook Meeting Request window to schedule interviews with the candidate and/or interviewers (optional).

e) **Forward:** allows you to share a candidate with a colleague for them to consider for job openings.

f) **Candidate contact information:** if you email through this link, the correspondence will not be tracked. Therefore, it is recommended to not utilize this option, and instead to email the candidate using the email icon in #1c.

g) **Resume & Cover Letter:** if uploaded by the candidate, click these links to view the resume and cover letter in the Resume Viewer.

2. Additional icons at the bottom of the application include:

   - **Removed from Consideration:** removes the candidate from consideration but does NOT exclude them (see the “Disqualifying and Removing Candidates from Consideration” section).
   - **Move Candidate:** an alternate way to move the candidate to a new status.
   - **Return to List:** takes the viewer back to the candidate list for the requisition.

3. The **Application** contains information that is entered by the candidate. Scrolling down the page will allow the user to see fields that vary based on role, including:

   a) **Correspondence:** all emailed correspondence sent to the candidate from the link in the application view is stored here for viewing and record-keeping purposes.
      - Use the email icon at the top of the window, instead of the link under the candidate’s name, to have the email correspondence tracked in this section.
   
   b) **Offer Letter:** if the applicant is chosen for a job offer, this section will track the offer history and status.
Appendix: Differences in Talent Pipelines Per Requisition

As referenced in the “Talent Pipeline” section, the Talent Pipeline will have variances depending on whether the requisition is Unclassified, Classified, or a Student/Term Adjunct requisition. The differences are shown below.

TALENT PIPELINE – CANDIDATE ROUTING

Unclassified Pipeline

- When candidates apply, they will show up under **New**.
- As you review candidates, those who meet minimum qualifications must be moved to **Application Review** for further consideration.
- If you are using a Search Committee, those candidates who you wish the Search Committee to consider will be moved to **Search Committee Review**.
  - If you wish to phone screen the candidate prior to sending to the Search Committee, you may move them to **Phone Screen** and then back to **Search Committee Review**.
  - Candidates may be moved to **Phone Screen** if you will be screening via phone, and also be moved straight to **1st Interview** if a Phone Screen is not needed.

Classified Pipeline

- This pipeline will show the first four sections grayed out, as only the Recruiter will have access.
- The Recruiter will do the initial screening and examination/assessment, and move those who meet necessary qualifications into **Application Review** status for the Hiring Coordinators to review and narrow further.
SUCCESSFACTORS RECRUITMENT: APPLICANT MANAGEMENT

Student/Term Adjunct Pipeline
- This pipeline allows for the Hiring Coordinator to move the student or term adjunct from the Application Review status straight to Offer Approval Request and bypass the Interview as a required stop.

TALENT PIPELINE – DISQUALIFYING/EXCLUDING FROM CONSIDERATION

Unclassified and Term Adjunct Pipelines
- Each option for removing the candidate from consideration includes a drop-down menu for further options.

<table>
<thead>
<tr>
<th>Interviewed - Declined Offer</th>
<th>Interviewed - Not Hired</th>
<th>Excluded from Further Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Classified Pipeline
- This pipeline adds disqualifying reasons related to the initial exam/assessment.

<table>
<thead>
<tr>
<th>Interviewed - Declined Offer</th>
<th>Interviewed - Not Hired</th>
<th>Excluded from Further Consideration</th>
<th>Excluded Did Not Pass Required Exam(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Student Pipeline
- This pipeline adds a disqualification reason related to work study eligibility.

<table>
<thead>
<tr>
<th>Excluded - Ineligible for Work Study</th>
<th>Interviewed - Declined Offer</th>
<th>Interviewed - Not Hired</th>
<th>Excluded from Further Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Overview: Setting Up Interviews & Viewing Ratings (Part 2)

Prior to using Part 2 of the Applicant Management process:
- Candidates have applied for the position
- The Hiring Coordinator and/or Recruiter have conducted initial screening of candidates
• Candidates chosen for interviews have been moved to a status of “1st Interview” (see Applicant Management Part 1 Quick Reference Guide)

Setting Up Candidate Interviews

1. Follow the instructions to log in under the “Accessing Candidates” section above.

2. Click on the [CANDIDATE NAME] for the candidate for whom you wish to set up interviews. This will open the candidate’s applicant profile.

   a) On the right side of the application, click [SET UP INTERVIEWERS].

   b) Click [ADD] to add interviewers.

   c) Enter the name of the interviewer(s) by typing into the box. The system will search as you type by either first name or last name. Click on the name of your interviewer when you see it populate to add to the list.

   d) Enter the date/time of the interviewers’ respective interviews.
SUCCESSFACTORS RECRUITMENT: APPLICANT MANAGEMENT

e) Click in the box [ ] to select the documents you wish to attach to the interview invitation email.
   - **Candidate attachments**, such as resume and cover letter, will appear on the left.
   - The **Interview Guide** includes attachments you uploaded in the “Interview Attachments” section when completing the requisition, such as interview questions/templates, Interviewer Job Aid for SuccessFactors, etc.

f) There are two additional features in the **Set Up Interviews** pop-up to help you save time for future candidates. (In both cases, you will need to enter interview dates/times for each interviewer.)
   - **Same people as last time** allows you to apply the same interviewers to this candidate as you entered for the previous candidate.
   - **Apply Interviewer List To All Applicants** allows you to set a “default” group of interviewers for this requisition for all candidates.

g) If there is a change, you can delete interviewers from the populated list or add new interviewers (see “2b” above).

h) Choose [SAVE] to save without sending the email; [CLOSE] to close the window without saving; and [SEND EMAIL] to send an email to the interviewers (recommended).

3. If [SEND EMAIL] is chosen, the interviewer will receive an email from you noting the job title, applicant name, date and time (if included), and a link to access information about the candidate.
   - Items attached (“2e” above) will be included in the email.

   **NOTE**: For further instructions for interviewers, please refer to the **Interviewer Quick Reference Guide** located on the **SuccessFactors website**.

   -----Original Message-----
   From: Ashley M Harrell [mailto:hoffmarf@ucmail.uc.edu]
   Sent: Thursday, January 22, 2015 11:47 AM
   To: Hoffman, Ruthie (hoffmarf)
   Subject: Candidate Interview

   Hello Tyana Owings,

   You are scheduled to interview a job applicant on .
   Job title: Program Manager
   Applicant: Tyana L Owings

   To prepare for the interview, or to enter your assessment of the candidate, log in to the SuccessFactors system and follow the link from your To-Do list:
   https://performancemanager8.successfactors.com/login?companyId=UCTEST
Viewing Applicant Ratings

After Interviewers have interviewed candidates and have submitted their ratings through Interview Central, the Hiring Coordinator may log in to view cumulative ratings and results.

1. Access the Job Requisitions page.
   a. On the Home screen, click [HOME] and select Recruiting.

2. Click on the [REQUISITION JOB TITLE] whose candidate ratings you wish to review. This will open the Job Requisition Detail page.

3. On the Job Requisition Detail page, click [VIEW CANDIDATE RATINGS] under the requisition title.

4. The Candidate Ratings summary appears displaying cumulative rating results from all interviewers.
   a. Candidates are listed across the top of the page.
   b. Competencies, selected when the requisition was completed, appear in the left column.
c. **Cumulative ratings** based on each competency show per candidate.

d. The **Summary** shows the average for that candidate for all competencies.

e. If the candidate has not been rated, you will see “n/a”.

f. On the right side of the screen you have the ability to view **Stack Rankings** of candidates. This tool can help you sort candidates by their cumulative rating based on **Competency** or **Summary** (the overall rating).

![Stack Ranking](image)

NOTE: UC is not using the “thumbs up/thumbs down” feature of this system given the subjective nature of such indicators. Therefore, you will not see the “thumbs up/thumbs down” ratings in the stack ranking or candidate summaries.

g. To print a detailed summary, click the **[PRINT PREVIEW]** icon.

h. The **Print Preview** breaks down each individual interviewers’ ratings further.

5. You may also view cumulative average scores and overdue interviews within the **Candidate Summary** view.

   a. To access candidates and see which requisitions have new candidates, look under the **Candidates** column on the Requisitions page.

   b. Click the [#] under candidates to open the **Candidate Summary** for that position (below).

![Candidate Summary](image)

6. Under the **Interview Result** column, you may view cumulative average scores for each candidate.

   a. Hover over each candidate to see a breakdown of overall rating by Interviewer.
b. If you do not see the **Interview Result** or **Overdue Interviews** columns, click the gearshift icon to select those in the “Display” options (see the “Accessing Candidates” section).

7. Under the **Overdue Interviews** column you can quickly see which candidates have been interviewed but for whom ratings have not been submitted.
   a. Hover over the “alert flag” to see which Interviewers are past due to submit ratings. (Overdue alerts are based on the date/time of the interview entered into **Interview Central**. If the date/time was not entered, nothing will show in this column.)

---

**Overview: Offer Approval & Offer Letter (Part 3)**

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. Follow the instructions to log in under the “Accessing Candidates” section above.
2. 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.

d. All remaining candidates should be disqualified/dispositioned, 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 Approval Request status in the Talent Pipeline.
   a. Drag-and-drop candidate from Finalist to Offer Approval Request.
2. From the pop-up window click [APPLY UPDATES].

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]. This step is required. Changing the status does not complete the offer process; it only changes the status of the candidate.

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 at the bottom of the form 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 targeted **Start Date** and **Contract percentage**.
   - Actual FTE% comes from the 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** (a salary above the midpoint of the position’s salary range), choose “Yes” here. **PLEASE NOTE:** The midpoint of the salary range and the “Planned Compensation” are not necessarily the same figure.
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.)
   - The salary amount is the figure you wish to offer to the candidate, if approved.

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.

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 #13.

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

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

**NOTE:** The Office of Equal Opportunity and Access may review the candidate you wish to extend an offer to in order to make sure the candidate meets minimum qualifications and that the President’s Diversity Initiatives were followed during the hiring process.

---

**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 and OEOA (if applicable), you may create a *Contingent Offer Letter* for your candidate.

1. Drag-and-drop the candidate into **Offer Letter** on the Talent Pipeline.
2. Click **[APPLY UPDATES]** from the pop-up screen.
3. Click the candidate’s name in the **Job Requisitions** screen to open the application.
4. Choose **Offer Letter** from the **Offer** drop-down menu within the application.

5. 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.

---

**Template:** Contingent Offer Letter AAUP  
**Subject:** Offer of employment
c. Based on the template chosen, the pre-approved verbiage will appear in the editing box. The verbiage in all templates has been approved by Central Human Resources, the Provost Office, and General Counsel.

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.

6. 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.

7. 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. **Please note that there are 2 options – one for internal, and one for external.** Please choose the correct one based on the source of your candidate.

   b. Items in **RED CAPS** 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.

6. **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.

### Checking the Offer Status

Once an offer has been submitted, you can check the status of the offer within the candidate’s application.

1. Open the candidate’s application by clicking on the candidate’s name in the candidate summary.
2. In the application, scroll down until you see the “Offer Letter” heading.

3. If you recorded a “Verbal Offer”, you will see it recorded here.

4. For “Online Offers” only, the system will enable you to see the status of the offer. There are 4 status possibilities that you may see here:

   - **Pending (Viewed)** – The offer has not been accepted or declined, but the candidate has viewed the offer.
   - **Pending (Not Viewed)** – The offer has not been accepted or declined and the candidate has not yet viewed the offer.
   - **Declined** – The offer has been declined by the candidate. Please contact the candidate for further information and to follow-up.
   - **Accepted** – The offer has been accepted by the candidate. You may continue to the next step below.

5. If you wish to cancel the offer, please contact your recruiter prior to doing so. Due to the urgency and sensitivity of cancelling a job offer, it is advised to have a conversation with your Recruiter prior to impacting a job offer.

---

**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 **Stage 2 Application** 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. Update the candidate’s application with the Actual Start Date. This may differ from the start date input into the Offer Approval Request for various reasons, including the candidate negotiating a different start date, the background check taking longer to complete, etc. The start date entered here is what will be sent over to UCFlex and impact the candidate’s Onboarding date.

3. 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 Selection.com. (If you have not received your Selection.com username and password, please contact your recruiter.)

4. 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.