Complete an Offer Approval

Overview

After the successful candidate is selected as a result of the recruiting process, the Org Chief (or delegate) is responsible for:

- Discussing the offer with the individual who will approve the offer (if someone other than the hiring Org Chief),
- Consulting with Human Resources (if applicable),
- Verifying credentials,
- Extending a verbal offer to the successful candidate,
- Providing the offer details to HR Shared Services to complete the Offer Approval or completing the Offer Approval and identifying the offer approver in SuccessFactors, and
- Approving the offer (if applicable) or sending the offer approval to the applicable offer approver.

Note: The hiring Org Chief (or delegate) is typically the offer approver. If this is the case, the final approval can be completed as part of this procedure.

The Offer Approval contains multiple data fields. SAP populates some fields through an interface with SuccessFactors, while SuccessFactors populates others. The remaining fields must be completed by the Org Chief (or delegate). For a full list of offer approval fields that includes requirements and information about how each field is populated, refer to the Offer Approval Field Reference. It can be used as you work your way through.

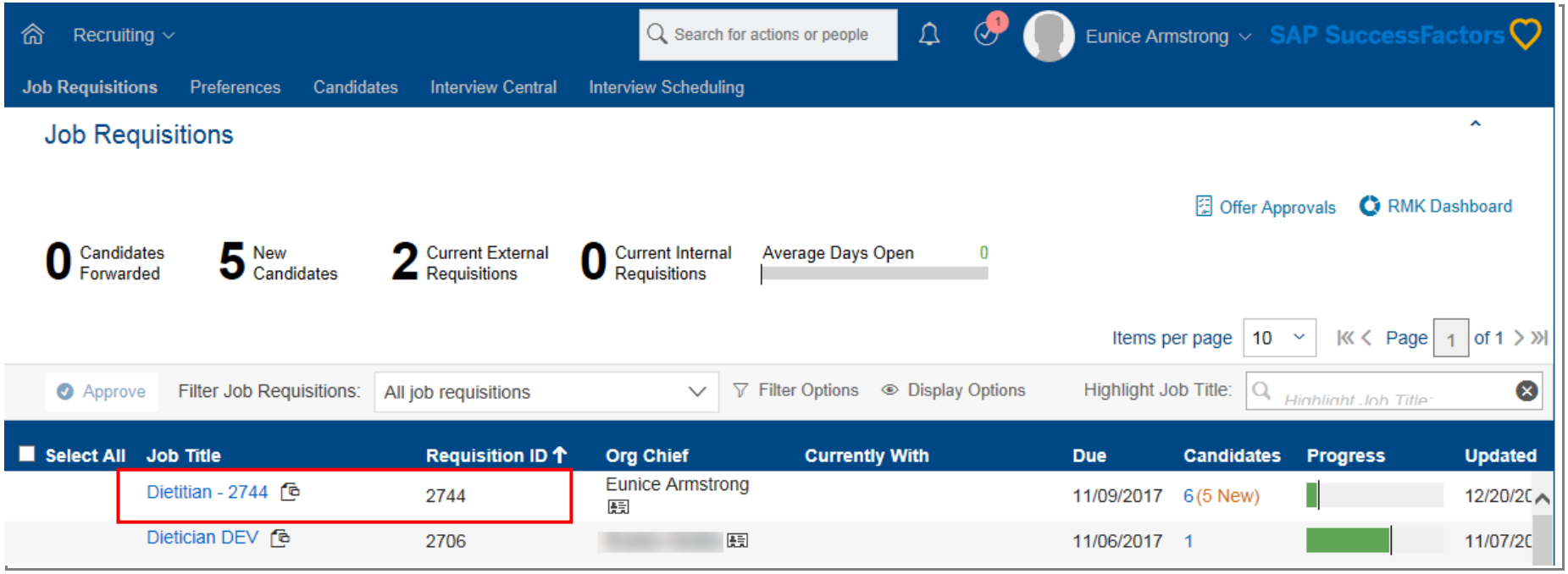
Procedure

1. Click the **Home** menu and select **Recruiting** from the drop-down.

The *Recruiting* screen appears and displays a list of requisitions.

2. Click the **applicable job requisition** under the **Job Title** column.

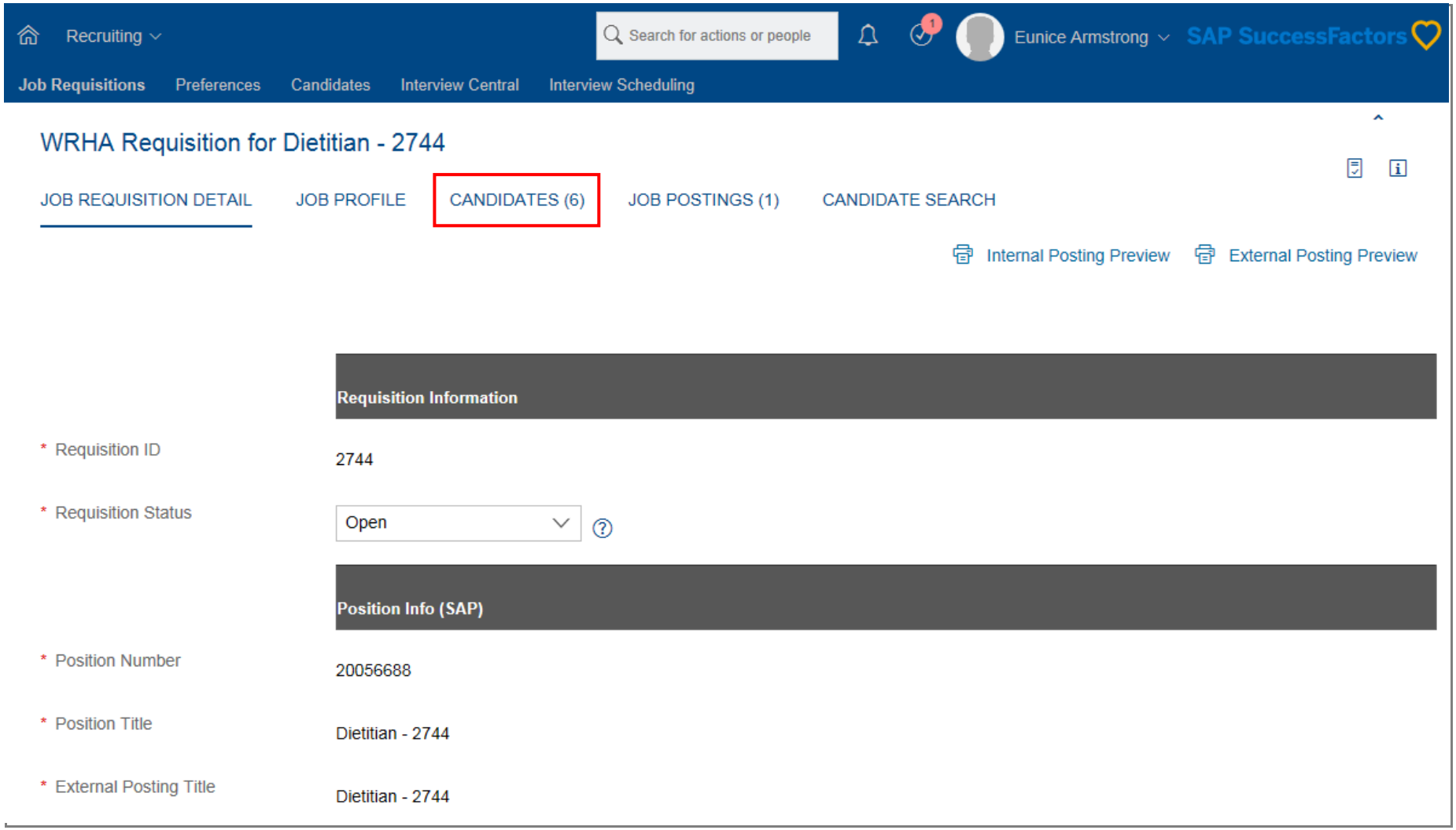
Note: The corresponding requisition ID appears next to the job title in the *Requisition ID* column. The requisition ID is unique to the individual requisition and is useful to reference when you have more than one job requisition with the same job title.



The *Requisition* screen appears and displays requisition details.

3. Click **Candidates**.

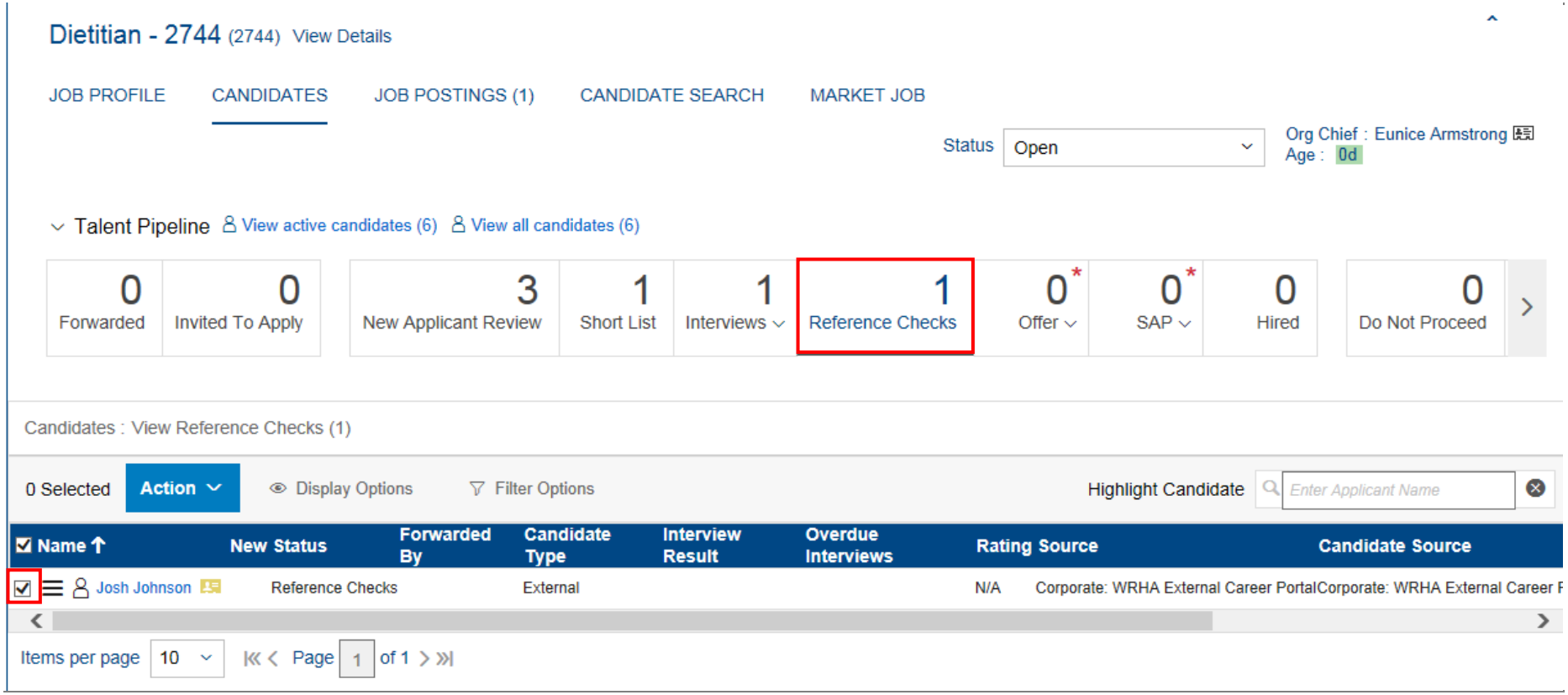
Note: The number that appears in brackets beside "Candidates" represents the number of applicants for the position.



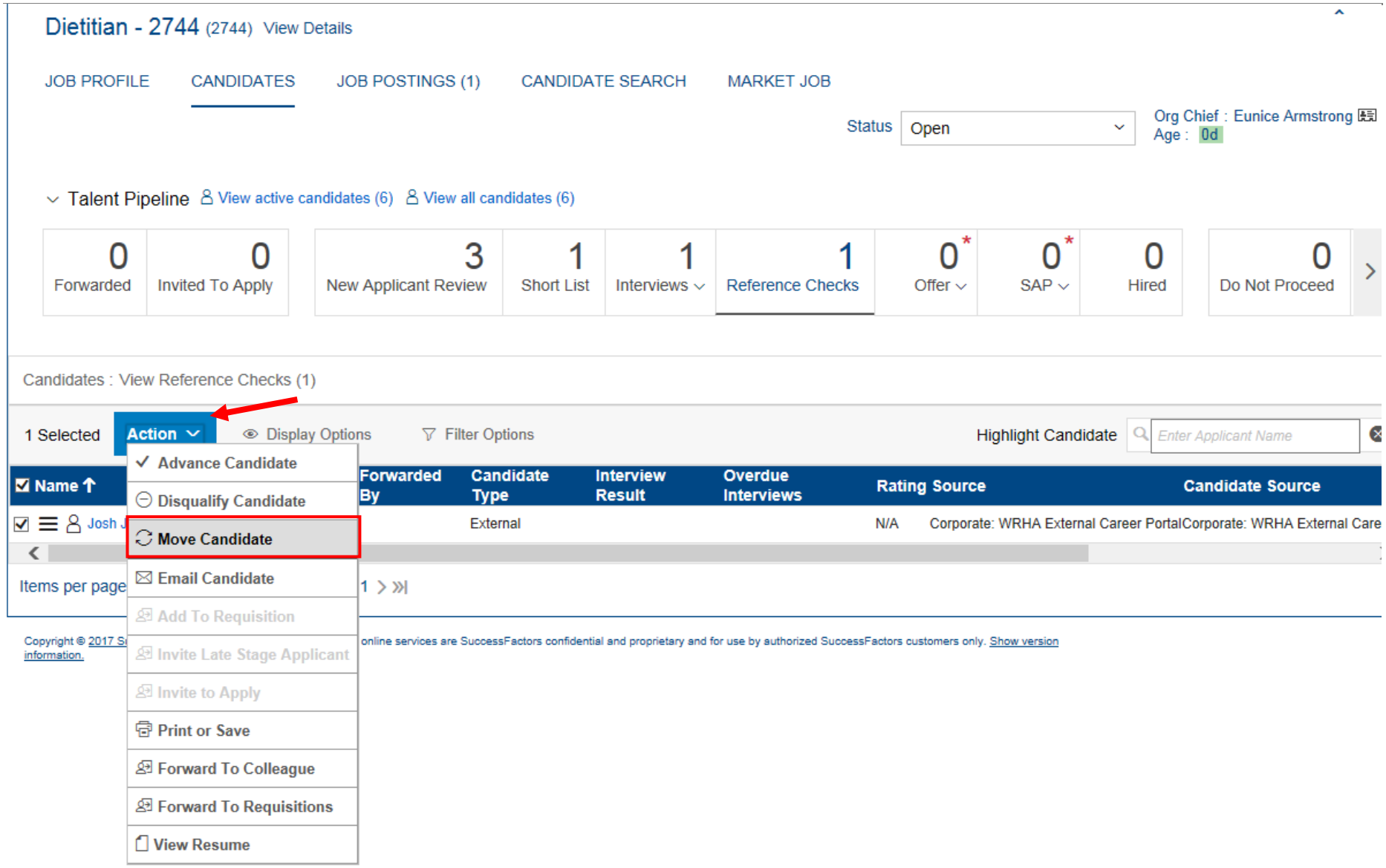
The *Talent Pipeline* screen appears.

4. Click the **Talent Pipeline segment** where the successful candidate is located. In this example, the successful candidate was last moved into the Reference Checks segment.

5. Click the **checkbox** next to the candidate's name under the **Name** heading.



6. Click the **Action** button and select **Move Candidate** from the menu.



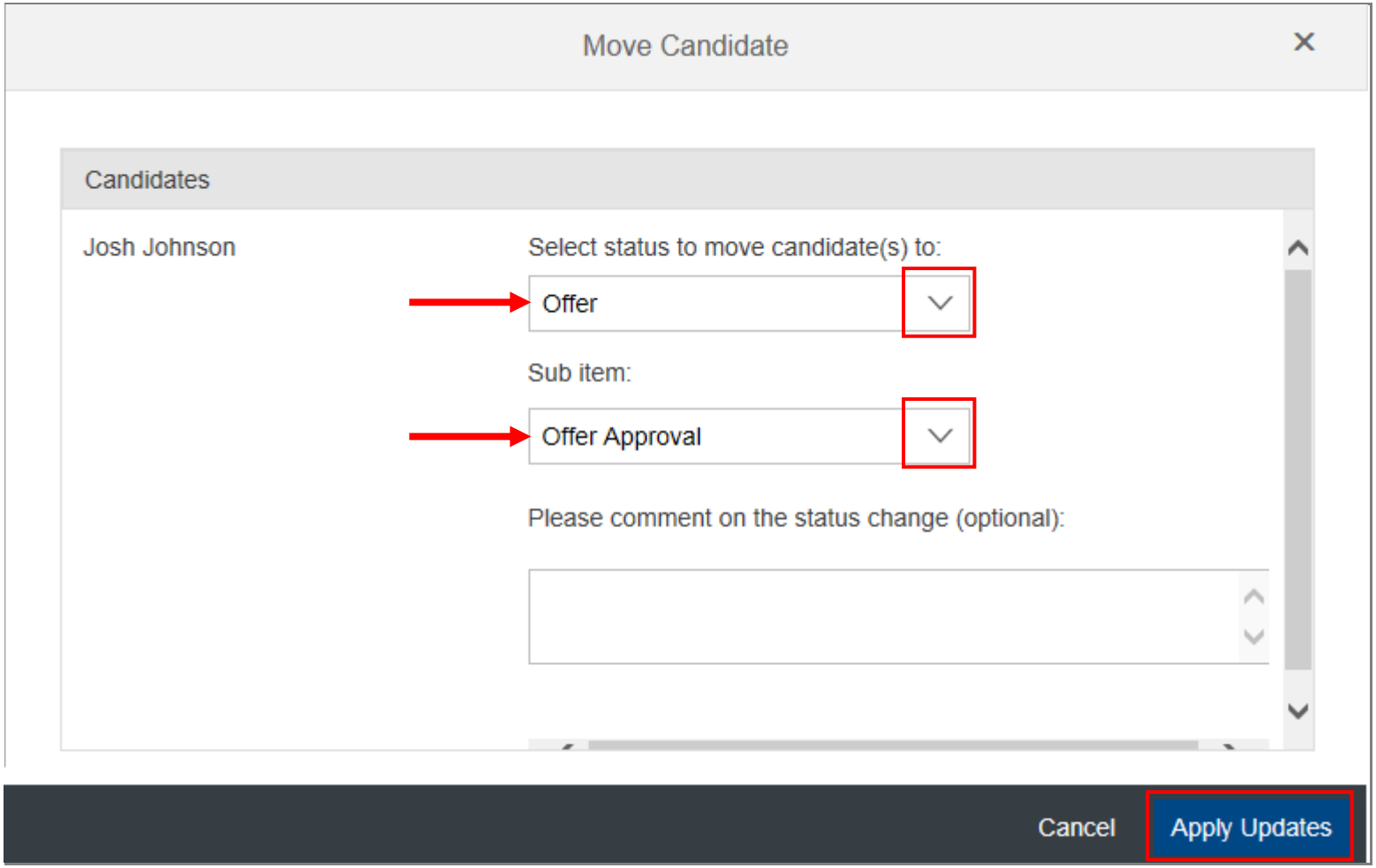
The *Move Candidate* screen opens.

7. Click in the **Select status to move candidate(s) to** menu and select **Offer** from the dropdown.

8. Click in the **Sub item** menu and select **Offer Approval** from the dropdown.

   Note: *Offer* must be selected from the *Select status to move candidate(s) to* drop-down menu in order for the *Sub item* menu to appear.

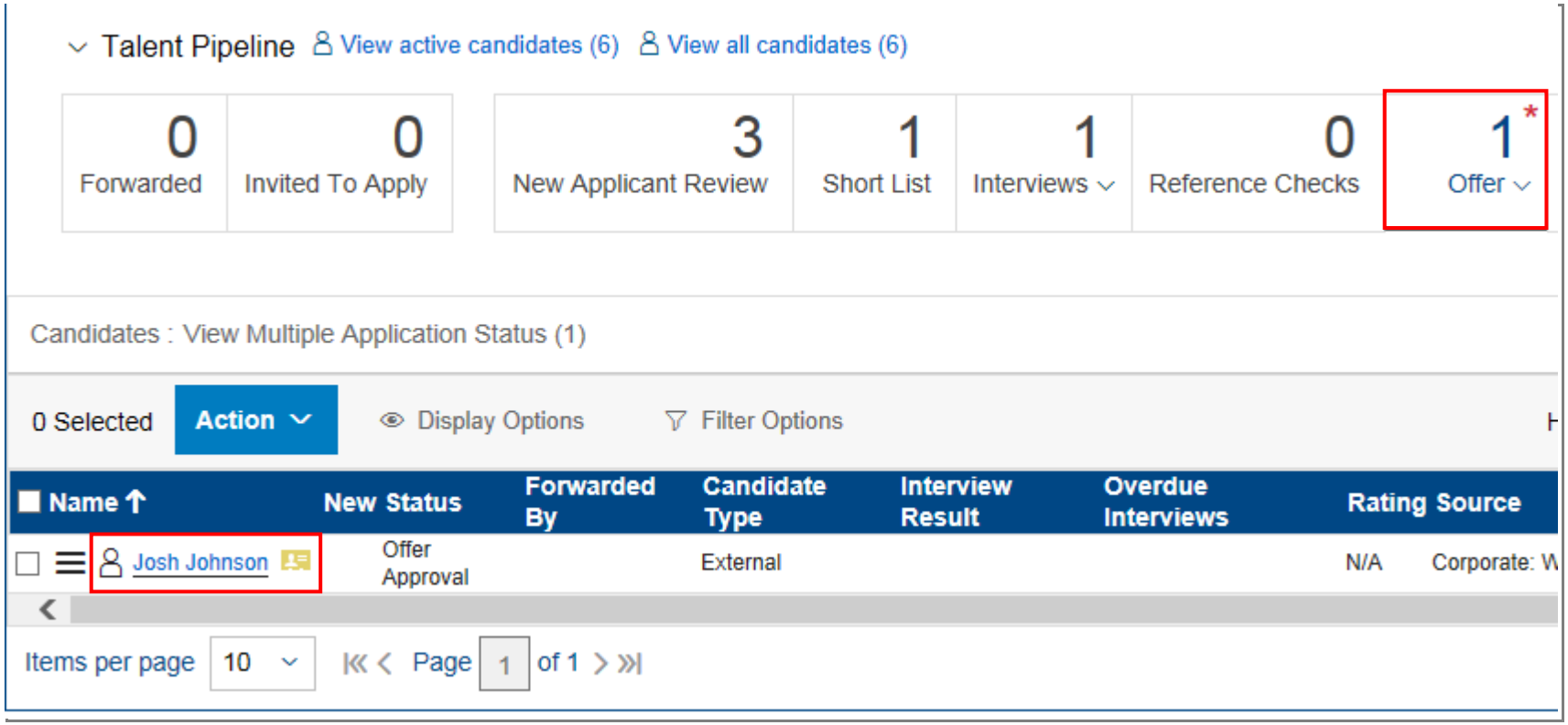
9. Click the **Apply Updates** button.



The candidate is moved into the *Offer Approval* subfolder within the *Offer* segment of the Talent Pipeline.

10. Click the **Offer** segment.

11. Click the **candidate's name**.

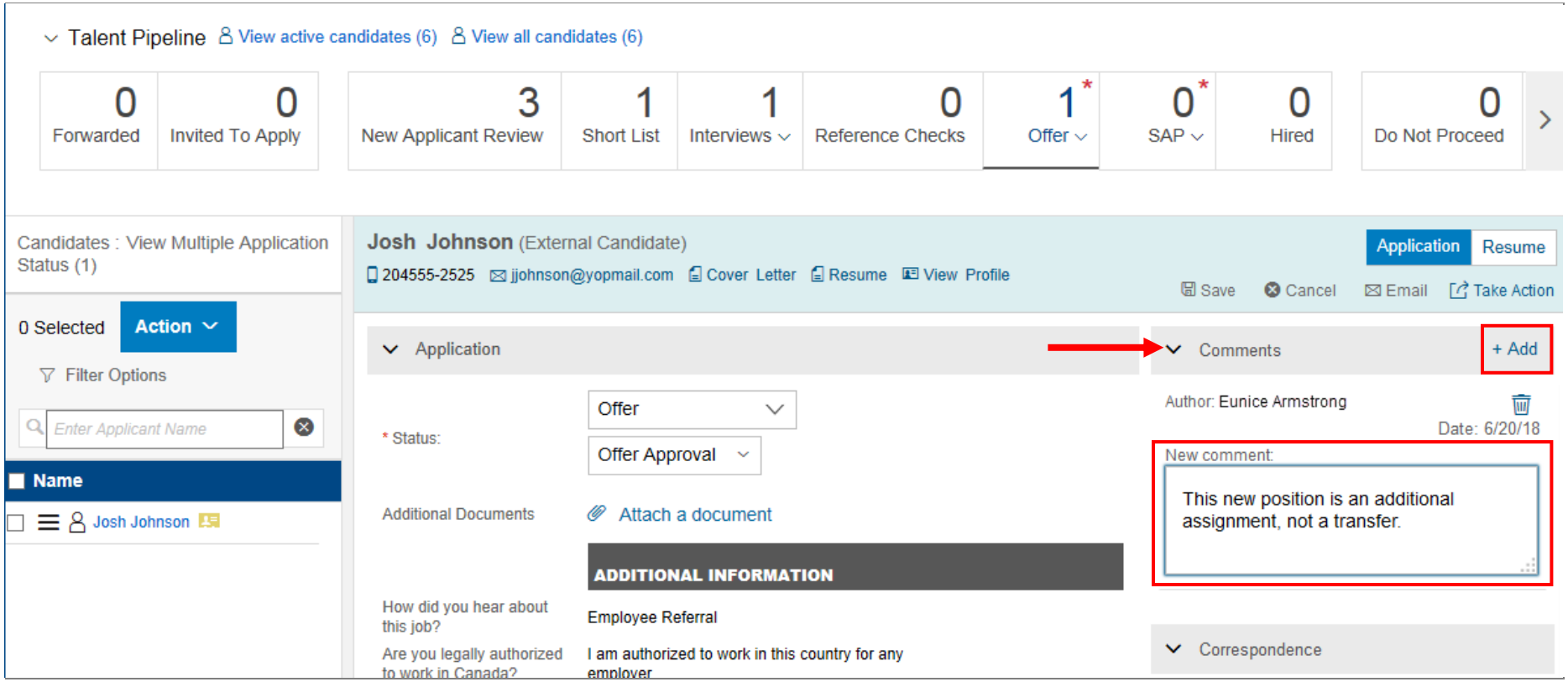


The *Candidate Overview* displays beneath the *Talent Pipeline*.

Note: If you wish to communicate information to HR Shared Services that specifically pertains to the offer letter, enter the information in the **Comments** area on the far right side of the screen. Some examples include:

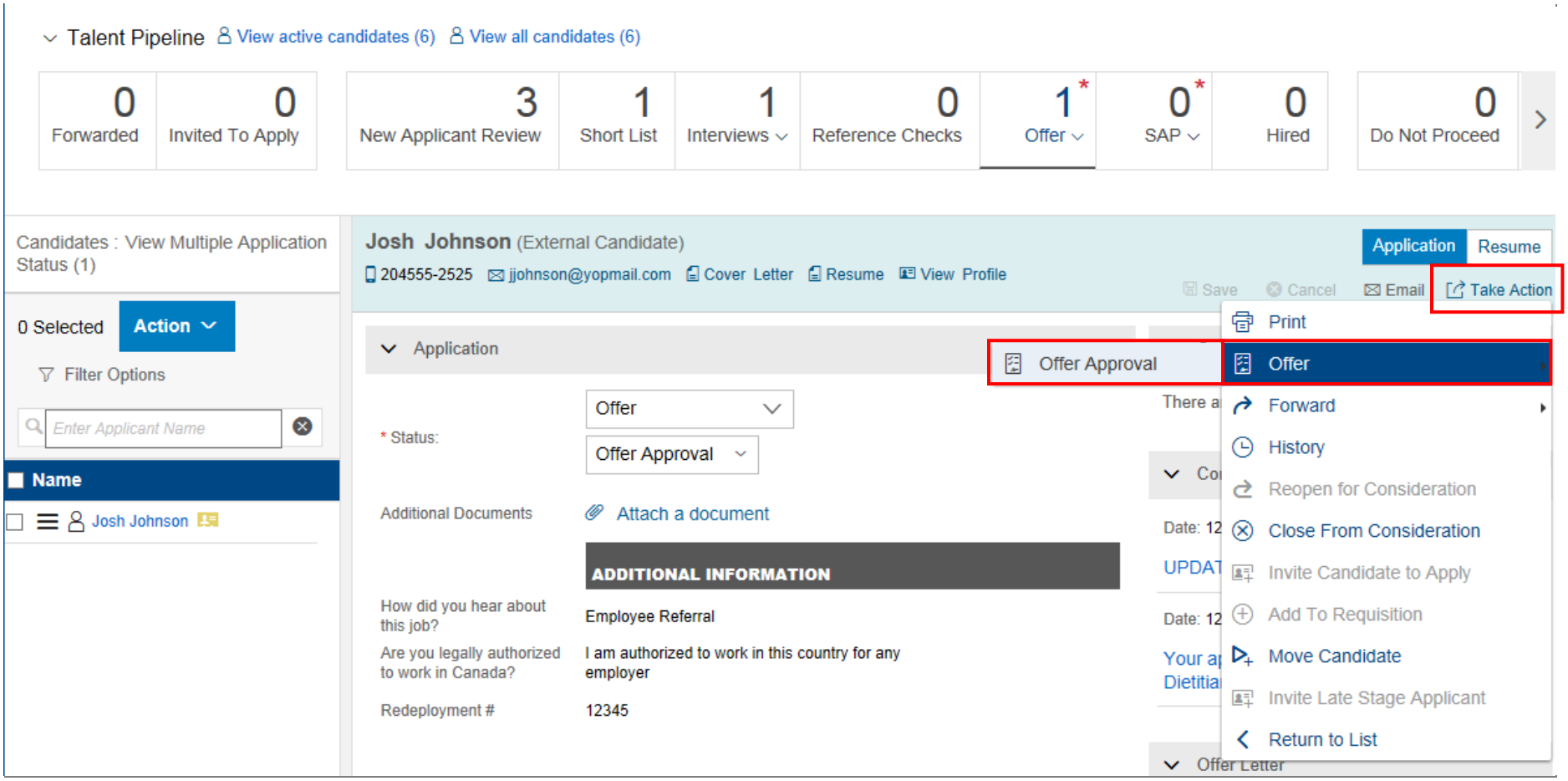
- Additional requirements for the offer letter (e.g. underfill, requires bachelor degree in 2 years)
- A waiver for the security checks (requires HR Director approval)
- Notes related to if/when the offer letter has been edited
- Clarification if the new position is to be an additional assignment (e.g. vs. a transfer)

Simply click **+ Add** to open the **New Comment** field and enter the applicable information.



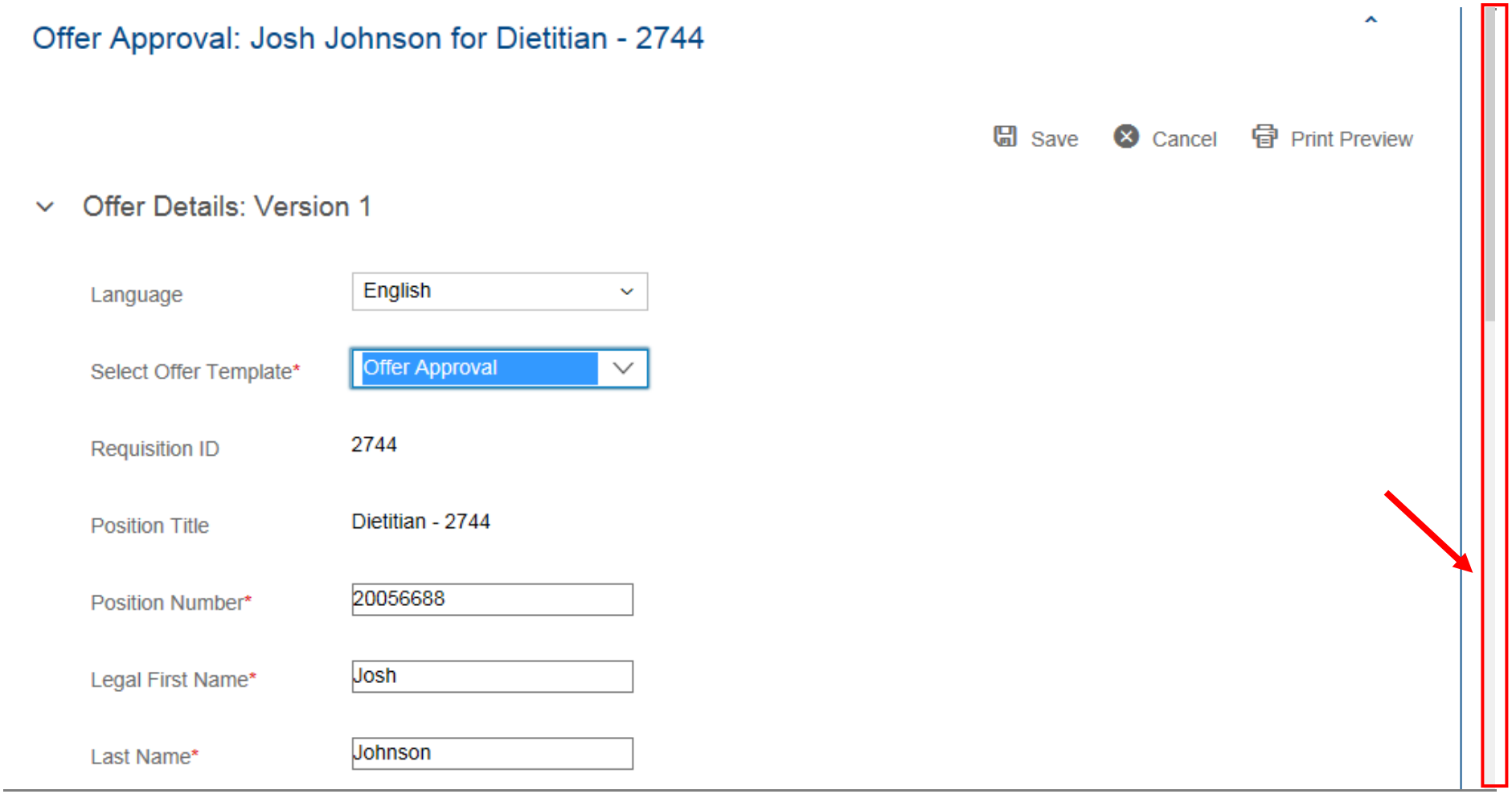
On the far right of the screen,

12. Click **Take Action**, place your cursor over **Offer** in the menu, and then click **Offer Approval** in the sub-menu.



The Offer Approval screen appears.

13. Scroll down the screen until you reach the **Start Date** field.



14. Enter the **employee's start date** in the **Start Date** field.

    Note: The employee's start date in the position must be correct when the offer is approved so that it's also correct within the SAP payroll system. This ensures that:

    - the employee will be paid accurately
    - timekeeping is available
    - the correct cost center is charged
    - the correct start date appears on the offer letter
    - the correct start date is recorded on any applicable benefit forms (so the timeline for the completion of their benefit forms, per the benefit provider's rules, begins on the correct date and any issues if those completion deadlines are missed can be avoided)

    Note: Changes that need to be made after an offer is completed and approved will require site HR approval.

15. Review the **Previous Incumbent's Work Schedule** and **Previous Incumbent's Timekeeper ID** fields

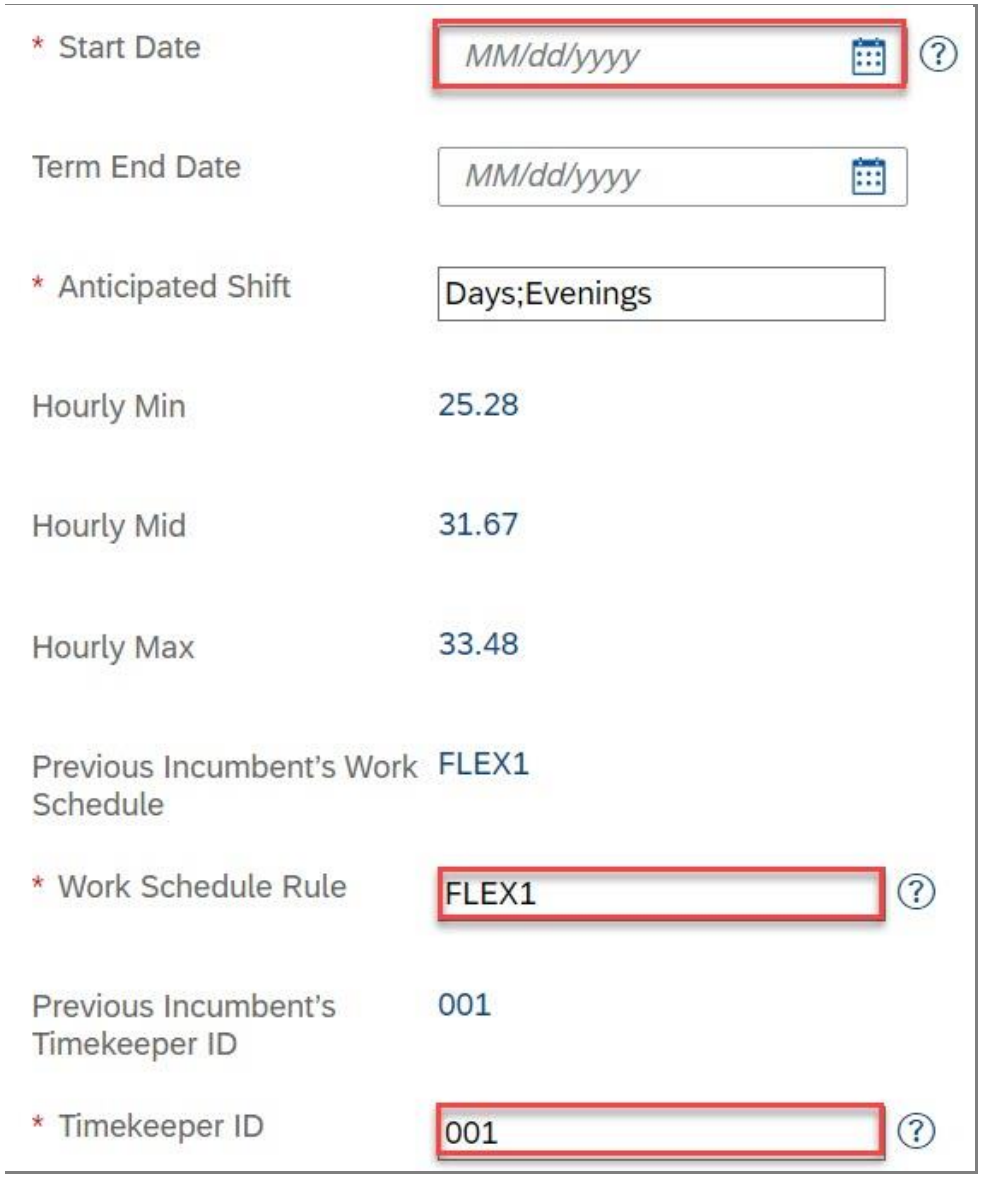
16. Overwrite or enter the **Work Schedule Rule** in the **Work Schedule Rule** field, if the successful candidate will have a different Work Schedule Rule than the previous incumbent.

17. Overwrite or enter the **Timekeeper ID** in the **Timekeeper ID** field, if the successful candidate will have a different Timekeeper than the previous incumbent.

    Note: The Work Schedule Rule and Timekeeper ID

    If the position is new, both the *Previous Incumbent's Work Schedule* and *Previous Incumbent's Timekeeper ID* fields will be blank.

    If the information is unkown at the time the offer approval is being completed, the fields can be left blank. HR Shared Services will contact the Org Chief for the data.



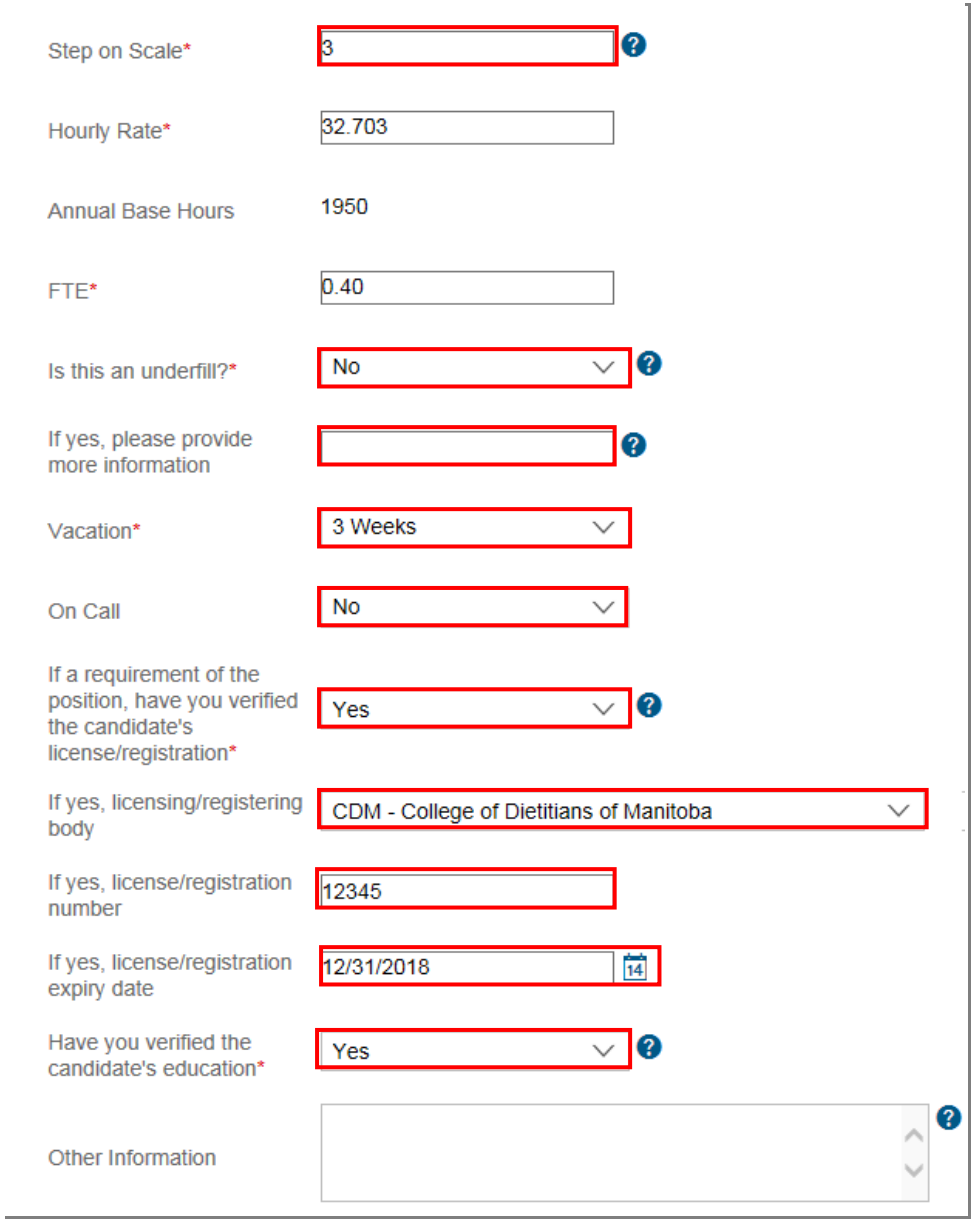
18. Complete the following fields as required:

- Step on Scale

  Note: The Hourly Rate field will autopopulate with the rate of pay that corresponds to the step on scale that was entered.
- Is this an underfill?
- If yes, please provide more information (required if Yes selected for Is this an underfill?)
- Vacation
- On Call
- If a requirement of the position, have you verified the candidate's license/registration
- If yes, licensing /registering body
- If yes, license/registration number
- If yes, license/registration expiry date
- Have you verified the candidate's education

Note: The *Other Information* field can be used to enter comments that are relevant for consideration by an offer approver who is not the org chief completing the offer. These comments are not visible to HR Shared Services staff.

For a full list of offer approval fields that includes requirements and information about how each field is populated, refer to the [Offer Approval Field Reference].



19. Scroll down the screen to the **Approvers: Version 1** section.

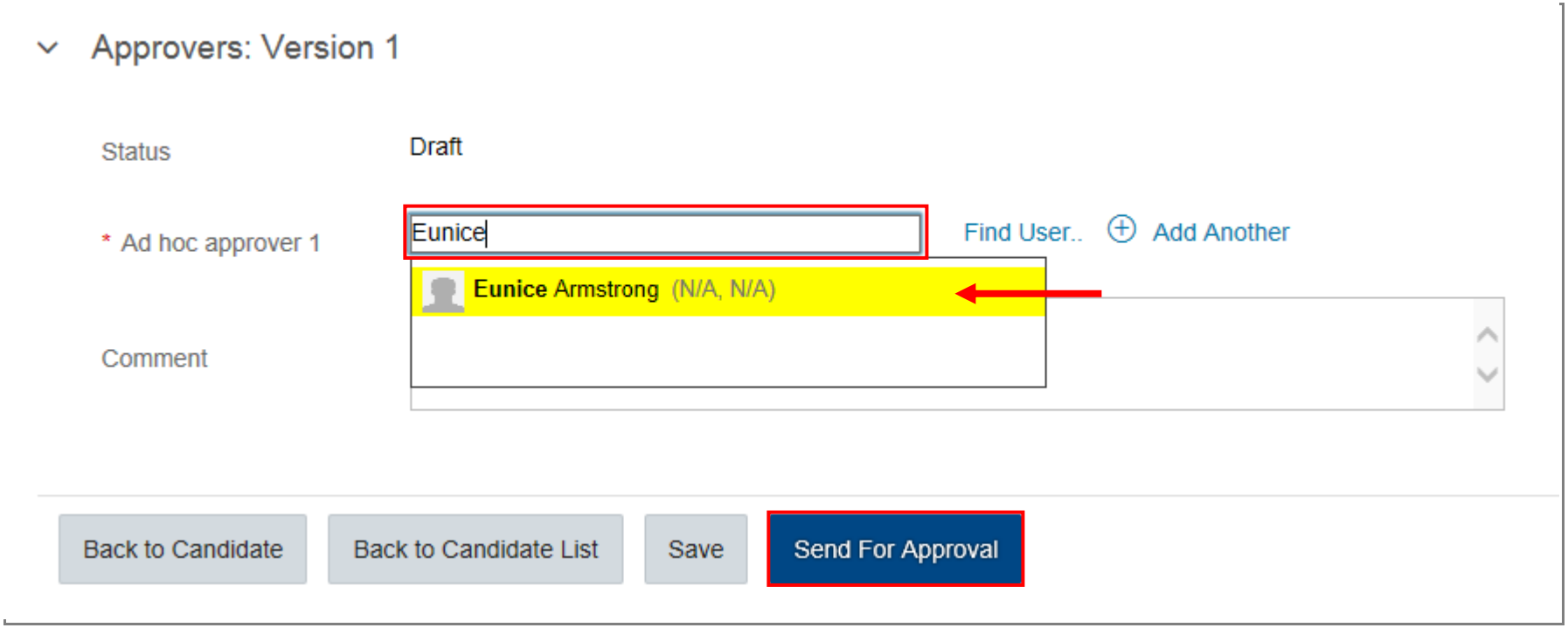
    Note: The offer approver must be identified at this stage so that SuccessFactors can route the approval to the individual responsible for performing the approval. The offer approver can be the Org Chief, a delegate, or another user identified by site process.

20. Enter the **name of the individual who will approve the offer** in the **Ad hoc approver 1** field.

    Note: As you type, the system will propose names that match your criteria directly below the field. Continue typing until the user's name you want to add as the offer approver appears.

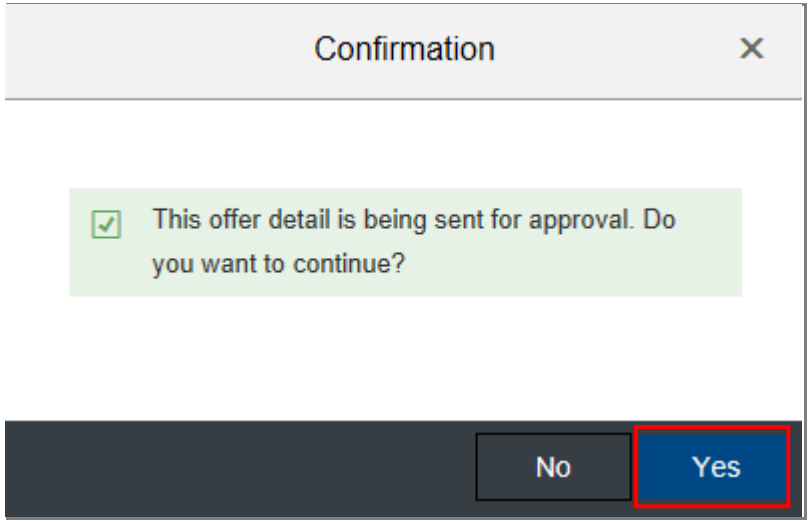
21. Click the **applicable name**.

22. Click **Send for Approval**.



A *Confirmation* pop-up window appears.

23. Click **Yes**.



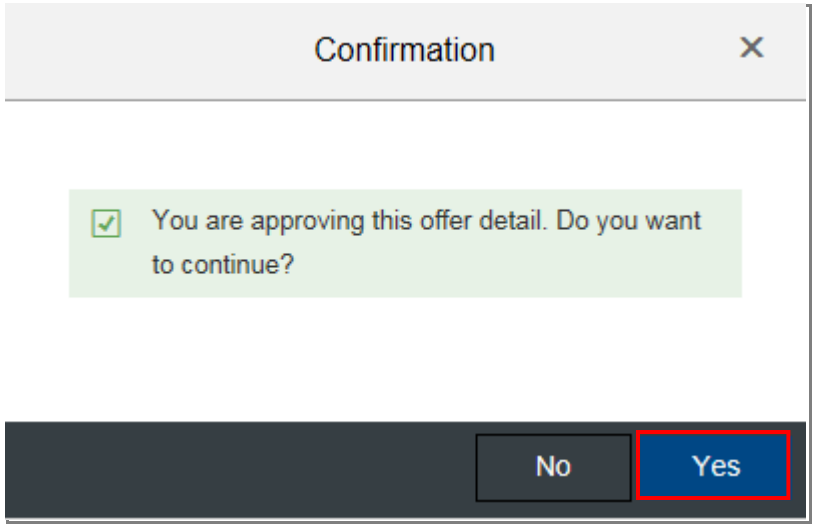
Note: If you identified another user as the offer approver at step 20, this procedure is complete. An email notification is generated and sent to the other user indicating that an offer is pending their approval. See how to Approve an Offer for more information.

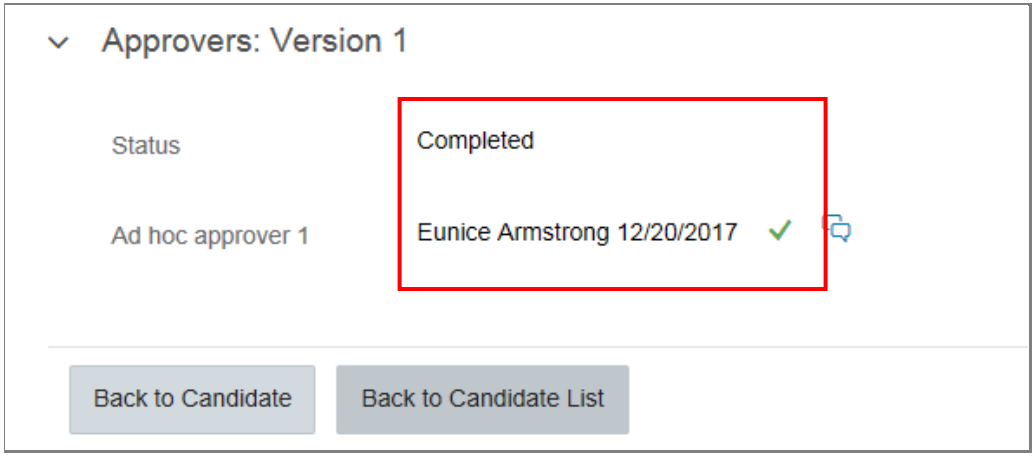
If you identified yourself as the approver in step 20, the *Send for Approval* button now displays *Approve*.

24. Click **Approve**.

A *Confirmation* pop-up window appears.

25. Click **Yes**.





Note: The approval *Status* now displays *Completed*, and the approval date appears beside the approver's name with a green checkmark.

You can click ***Back to Candidate*** List to return to the Talent Pipeline screen.

Next Steps

When the final approval is completed for the offer, HR Shared Services uses SuccessFactors to create an offer letter and sends it electronically to the successful candidate. The Org Chief will receive an email notification when the successful candidate accepts or declines the online offer.