

SuccessFactors: Recruiting/Onboarding Quick Reference Guide

OFFER APPROVAL

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Duke

HUMAN RESOURCES

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Overview

Welcome to SuccessFactors! This Quick Reference Guide (QRG) was created to provide detailed guidance on how to initiate the Offer Process for a candidate. This guide will review the following:

- How to initiate the offer process after selecting a finalist.
- How to create the Offer Approval and route approval.
- Creating the Offer letter is covered in a separate guide.

THE OFFER PROCESS

The offer process is initiated after candidates have been reviewed and/or interviewed and a finalist has been identified. The process may vary by business unit.

NOTE: Please consult your entity HR department for more information about your unit's business process. The offer process in SuccessFactors does not replace the interaction with HR to determine the appropriate amount of the offer or the conversation with the candidate discussing the offer. It is the method of recording the information about the offer after a candidate has accepted verbally.

Once an offer is accepted, the Hiring Manager or designee will enter a final disposition reason/code for all non-selected candidates. At this point in the selection process, all non-selected candidates will receive an email notification informing them of their status. For more information about the Offer Process, watch the **Candidate Review – Offer Process** training video.

For additional details on working with SuccessFactors, online training videos are available and can be found on the Manager's Section of the HR Website under Recruitment and Hiring via the following link:

<https://hr.duke.edu/managers/recruitment/successfactors>.

Offer Process Definitions

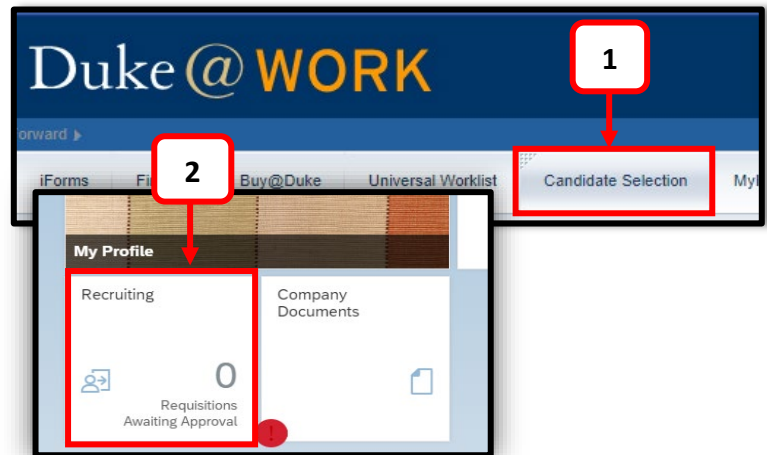
The offer process contains **two steps** – the **Offer Approval** and **Offer Letter** (covered in a separate guide). The **Offer Approval** is used to collect the data that populates the Offer Letter, moves to Onboarding, and into the Hire or Transfer iForm.

- The **Offer Approval** or **Offer** is the container holding the detailed offer information based on the selected template and the associated Ad hoc approver.
- The **Offer Template** is chosen by the initiator and determines the list of fields in the Offer detail.
- The **Offer Detail** is the list of fields available in the Offer Approval after choosing the template.

- The **Ad hoc Approver** is the initiator or other person who approves the Offer Approval.
- The **Offer Letter** is the letter generated from the information in the Offer Approval (Covered in separate Guide).

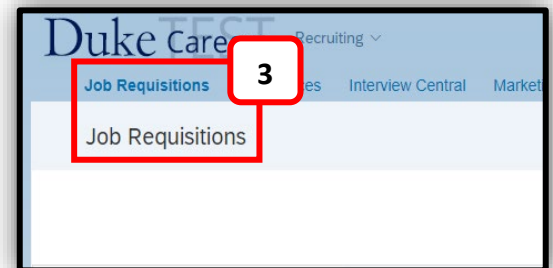
LOG IN

1. The tool is accessible via the [Duke@Work](#) portal. Click the **Candidate Selection** tab.
2. On the **Home** screen, locate and click on **Recruiting**.



JOB REQUISITIONS

3. The default page, **Job Requisitions** will display.
 - a. Click on the numbered hyperlinked under the **Candidates** column to open the Candidates View.



Job Title	Requisition ID	Hiring Manager ↑	Candidates
DEPARTMENTAL BUSINESS MGR III	349	ABAINA FARRELL	3
ADMINISTRATIVE SECRETARY 1 1	3710	CAROLINE NISBET	2
AMBULATORYCARE NURSE III 1	3744	CAROLINE NISBET	-

3a

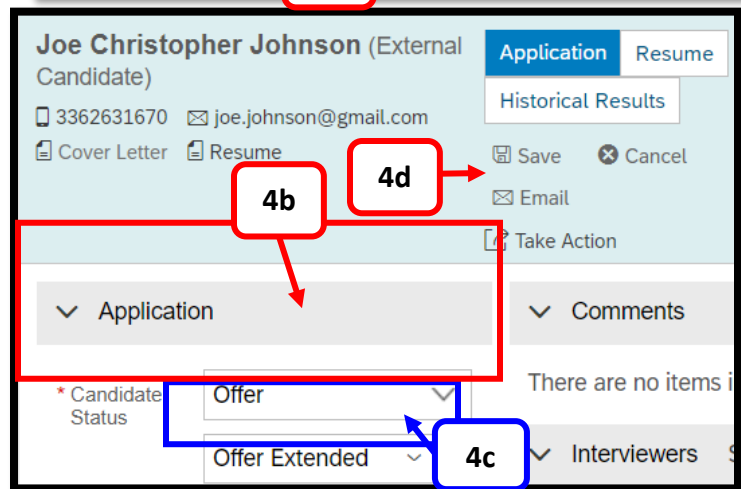
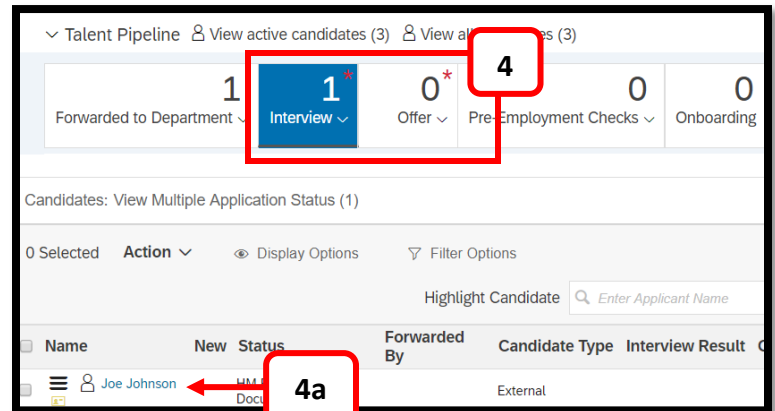
INITIATE AN OFFER

CANDIDATES VIEW

4. The offer process begins by moving the final candidate from the **Interview** step to the **Offer** step in the **Talent Pipeline**.

To initiate the offer process:

- a. Click on the **Candidate's Name**.
- b. Under **Application**, change the **Candidate Status** to **Offer**.
- c. Update the second drop-down with the appropriate Offer stage. **See page 3**, for a detailed description of **Offer Statuses**.
- d. Click **Save**.



OFFER STATUS DESCRIPTIONS

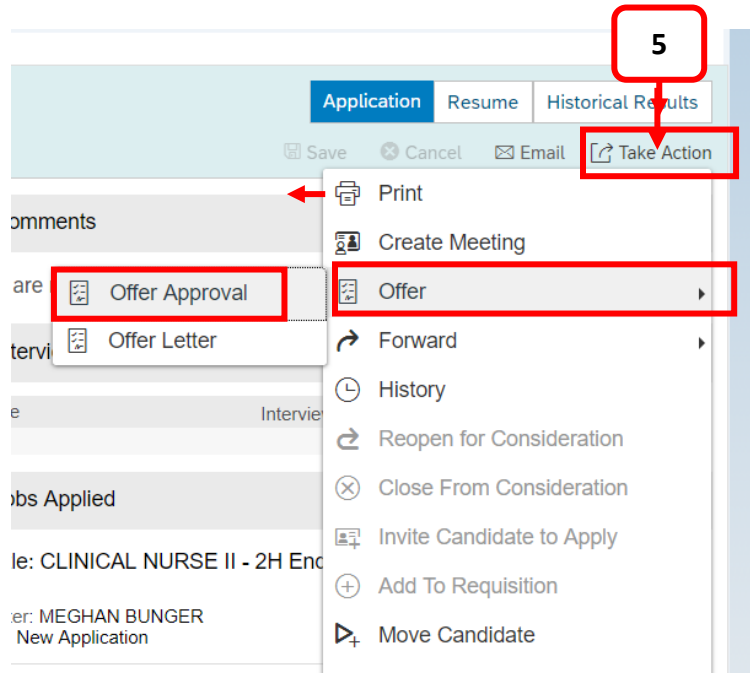
Offer Requested	<i>This step is required by your business units' recruitment or hiring process. This optional status triggers an email notification to the Hiring Team stating that the candidate is ready for an offer. This status is often used by business units that have central functions for sending standard offers.</i>
Offer Extended	<i>When a verbal or written offer is made. This status enables the Offer Approval process through the Take Action link.</i>
When Offer Extended is chosen, additional statuses are available:	
Offer Accepted	<i>Use if the candidate accepts the employment offer.</i>

Offer Declined	Use if the candidate declines the employment offer.
Offer Rescinded	Use if an offer is extended, but circumstances dictate rescission of the offer . Please contact your Entity HR department BEFORE rescinding any offer.

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5. The candidate is moved to the **Offer Extended** status when a verbal or written offer is made. This status enables the **Offer Approval** process through the **Take Action** link.

NOTE: This action is required. Pointing your mouse at the **Offer** will cause the other options to appear. Clicking on **Offer** does nothing.



OFFER TEMPLATES

The **Offer Approval Screen** will open. **Offer Templates** provide a method of collecting offer specific data that populates the offer letter and is forwarded to Onboarding and iForms. This is the data that will populate the Hire or Transfer iForm.

There are two version of the **Offer Template**; Bi-weekly and Monthly. The templates are the **same** except for:

- The **Bi-weekly Template** has Weekend Option, Daily Work Hours and Hourly Rate. Annual salary is based on actual hours worked and is not included.
- The **Monthly Template** has Monthly Rate with a corresponding Annual Salary and does not include Weekend Option and Daily Work Hours.

6. Select the **Offer Template**.

- a. The **Offer Details** fields are now displayed in the Offer and the ad-hoc approver section has shifted to the bottom of the page. The required fields are marked with an asterisk (*) at the beginning of the label.

The example is using the **Bi-weekly Template**. The next few pages will show screenshots of the **Offer Details** fields with required fields highlighted. Not all fields available are displayed.

The screenshot shows the 'Offer Details' form in SuccessFactors. A red box labeled '6' highlights the 'Select Offer Template' dropdown menu, which is open and showing 'Bi-weekly' as the selected option. A red arrow labeled '6a' points to the 'First Name' field, which is also highlighted with a red box. The form includes various fields with asterisks indicating required fields: 'First Name', 'Last Name', 'Job Code', 'Offer Letter Signator', 'Work Location', and 'Citizenship Status'. Other fields include 'Language', 'Requisition Number', 'Internal Title', 'Position Number', 'Reclass Job Code', 'Hiring Manager', and 'Citizenship Status'.

OFFER DETAILS SCREEN

INSTRUCTIONS FOR REQUIRED FIELDS

1. Review the candidate's **First and Last Name**. This is the name that will appear on the **Offer Letter**.
2. Ensure the **Job Code** is correct. Changing it will have no impact.
3. The **Reclass Job Code** is used to reclassify jobs within a clinical ladder. Only eligible job codes are listed.
4. The **Offer Letter Signature** is the name that is going on the **Offer Letter**. This can be the manager or someone else.
5. Select the **Work Location**. The drop-down list (or type ahead) includes a listing of Duke physical locations. Additionally, at the bottom of the list are remote locations for both NC locations that are not specifically listed and the states in which Duke is registered to do business. These are pre-fixed with the Remote – XX (RMXX) where XX indicates the state.

The screenshot shows the 'Offer Details' form with the following fields and values:

- Language: English US (English US)
- * Select Offer Template: Bi-weekly
- * First Name: Derek
- * Last Name: Jeter
- Requisition Number: 3710
- Internal Title: ADMINISTRATIVE SECRETARY 1 1
- Position Number: 50014205
- * Job Code: 121 - ADMINISTRATIVE SECRETARY
- Reclass Job Code: No Selection
- Hiring Manager: CAROLINE NISBET
- * Offer Letter Signator: (empty)
- * Work Location: Remote - CA (RMCA)
- * Citizenship Status: Citizen
- * Start Date: 07/06/2019

Numbered callouts point to the following fields:

- 1: First Name
- 2: Job Code
- 3: Reclass Job Code
- 4: Offer Letter Signator
- 5: Work Location

- a. If you have difficulty finding a work location, chose Remote-XX. The correct address will be added in iForms.
- b. The work location is what determines what tax forms will be presented to the candidate in Onboarding.
- c. This information is shared with Identity Management and Parking and can assist helping the candidate choose the best parking location.

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6. Select the **Citizenship Status**.

A candidate's Citizenship Status should be confirmed as part of the interview process.

The candidate has responded to questions in the job

application that indicate additional consultation with Visa Services may be required. This should be done **before** the offer.

* Citizenship Status Citizen ← 6

* Start Date 07/06/2019 ← 7

7. In the **Start Date** field, enter the expected first day of work.

Are you legally authorized to work in the United States? No Selection

Will you now, or in the future, require sponsorship for employment visa status or will require renewal (e.g. H-1B, TN, J-1, OPT)? No Selection

NOTE: From job application.

8. In the **Hourly Rate** field, enter the appropriate rate. If you select the **Monthly Template**, a monthly rate will be required.

9. In the **Contract** field, select the contract based on the number of hours per week the candidate is expected to work.

10. In the **Weekend Option** field, select Yes or No. **Yes**, indicates the candidate is working a weekend schedule. This will remind the iForms initiator to choose the correct employee subgroup.

11. In the **Daily Work Hours** field, choose the appropriate option - 4hr, 8hr, 10hr or 12hr.

12. In the **Hours Per Week** field, enter the number of hours the candidate is expected to work.

* Hourly Rate 25.22 ← 8

Target Bonus

Sign On Bonus

Relocation Amount

* Weekend Option No ✓ ← 10

* Daily Work Hours 12 ← 11

* Hours Per Week 40 ← 12

* Weeks Per Year 52

* Contract (Benefit Eligibility) 30 TO 39 HRS ← 9

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13. In the **Relevant Experience** field, select the years of relevant experience. This is a required field in the Health System and PDC. This should be entered as the total amount of experience as of October 1 for the year that you are in. For example, you are hiring someone July 1, 2019 the total experienced (completed/worked) entered should be as of October 1, 2019.

14. In the **Education** field, select the highest degree for the candidate.

15. Use the **Save** button at the bottom of the page to check entries.

The screenshot shows the SuccessFactors Offer Approval form. Callout 13 points to the 'Relevant Experience' dropdown menu. Callout 14 points to the 'Education' dropdown menu, which is currently set to 'CRNA - DNP'. Callout 15 points to the 'Save' button at the bottom of the form. Callout 16 points to the 'Ad hoc approver 1' dropdown menu, which is currently set to 'JOSEPH N NEELEY'. A red box labeled 'NOTE: Some fields are missing from the following screen shot.' is also present.

A message will alert you to errors and the fields in error a

Alert Changes saved. Some fields require additional attention.

* Start Date

MM/DD/YYYY

Field is required.

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16. The **Offer Template** must be approved by either the initiator of the offer or an ad hoc approver. The Ad hoc approver box is a type ahead and will display options as you type the name. Choose the appropriate name from the list.

The screenshot shows the SuccessFactors Offer Approval form with the 'Ad hoc approver 1' dropdown menu open. A list of names and titles is displayed, including 'BERNICE B JOSEPH (DUKE HOSPITAL (2100), M...', 'BRIAN JOSEPH COLIN (MEDICAL CENTER (1100)', 'DAVID JOSEPH ALLEN (UNIVERSITY (1000), Aca...', 'DIANE M JOSEPH (MEDICAL CENTER (1100), DC', 'DWAYNE C JOSEPH (UNIVERSITY (1000), FIN A...', 'HERLYDCIA JOSEPH- ANDRE (MEDICAL CENTER', 'JENNIFER H JOSEPH (DUKE HOSPITAL (2100), 6', 'JOSEPH YANAI (MEDICAL CENTER (1100), Pharm', and 'JOSEPH N NEELEY (CENTRAL ADMIN MANAGEN'. The name 'JOSEPH N NEELEY' is highlighted. A red box labeled '16' is next to the dropdown menu. A red box labeled 'is required' is also present.

17. After selecting the Ad hoc approval select **Send for Approval**. In this case, the initiator is the approver.

18. Notice the confirmation pop-up message informing you are sending the **Offer Detail** for approval. Select **Yes, to continue** or **NO, to return to the Offer Template**.

19. The Initiator can approve the Offer from the same screen after responding to the Offer detail pop-up message. Select **Approve**.

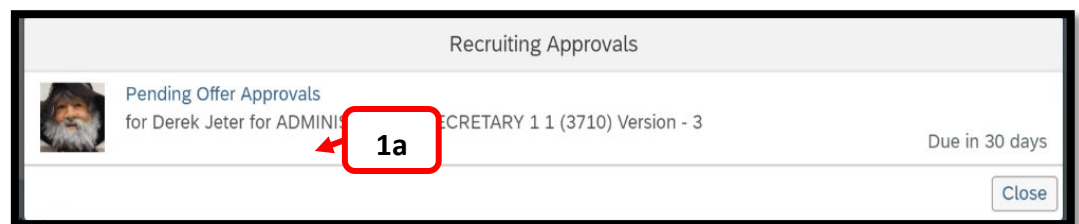
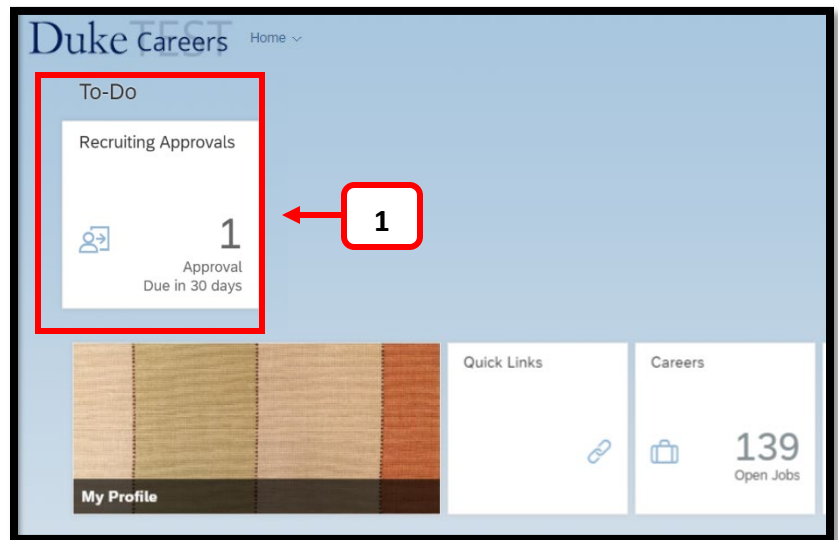
20. Notice the confirmation pop-up message informing you are approving the **Offer Detail**. Select **Yes** to continue.

21. If you sent the **Offer** to another person for Approval and respond to the confirmation pop-up, the only options are to go **Back to the Candidate** or **Back to the Candidate List**.

AD HOC APPROVERS

The Ad hoc Approver will receive an email notifying them that approval is waiting.

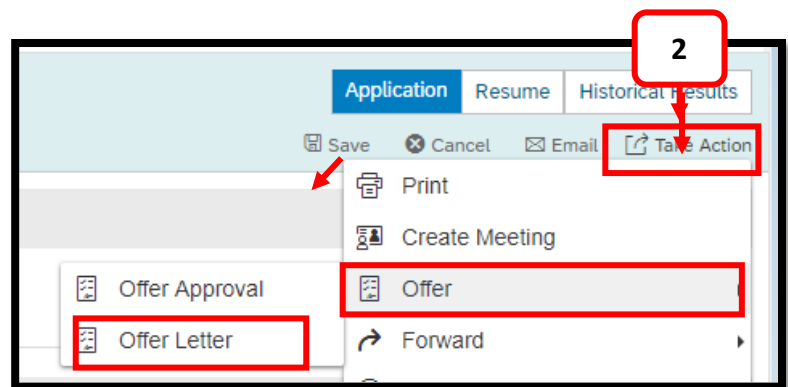
1. A new tile will appear on the landing page in SuccessFactors. Click on the tile to show the Approval Request.
 - a. Selecting the **Pending Offer Approvals** hyperlinked text will take the approver to the **Offer Detail**. The approval process follows the steps outlined above.



OFFER LETTER APPROVAL/DECLINE

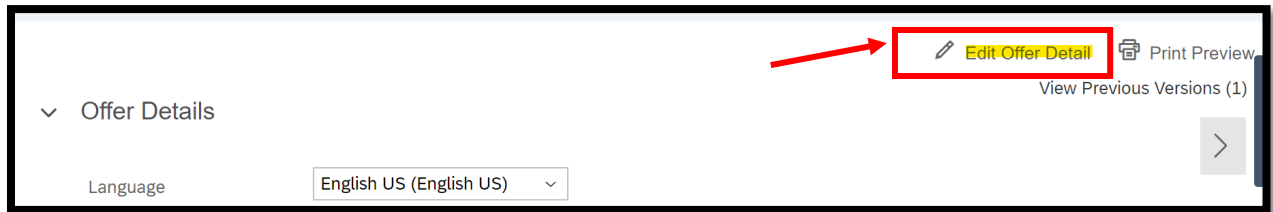
The **Offer** has now been approved. You can now generate the **Offer letter** which is covered in a separate guide.

2. Select **Take Action** and then **Offer** and then select **Offer Letter**.



Declined Offers

Declining the **Offer** does not reject the offer. It allows the initiator to make changes and resend for approval. Navigate back to the **Offer Approval** and use the **Edit Offer Button** on the top right had side of the **Offer Approval** to make changes to the Offer.



If you have questions about the Offer Process and Offer Approval, please contact your entity HR Department or refer to the Contact Resource page, found in the Managers section of the HR Website under Recruitment and Hiring.

<https://hr.duke.edu/managers/recruitment/successfactors>.