

# SuccessFactors: Recruiting/Onboarding Quick Reference Guide

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**PRE-EMPLOYMENT STEPS**

*Last Revised: 06/24/2019*

**Duke** | HUMAN RESOURCES

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### Overview

Welcome to SuccessFactors! This Quick Reference Guide (QRG) will walk you through the Pre-Employment Step of the Talent Pipeline in SuccessFactors. The guide will cover the following areas:

- Predecessor Steps
- Pre-Employment Checks Explained
- Action Required for New Hires (External Candidates)
- Action Required for Internal Candidates (Transfers)
- Moving to Onboarding (Internal and External Candidates)

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>.

### PREDECESSOR STEPS

The following are the predecessor steps for the Pre-Employment Checks pipeline step. You must do an **Offer Approval** in the system and have it approved before starting this step.

- Offer Approval and Offer Letter Approved.
- Offer Accepted by Employee.
- Candidate is in Offer / Offer Accepted pipeline status.

### PRE-EMPLOYMENT CHECKS EXPLAINED

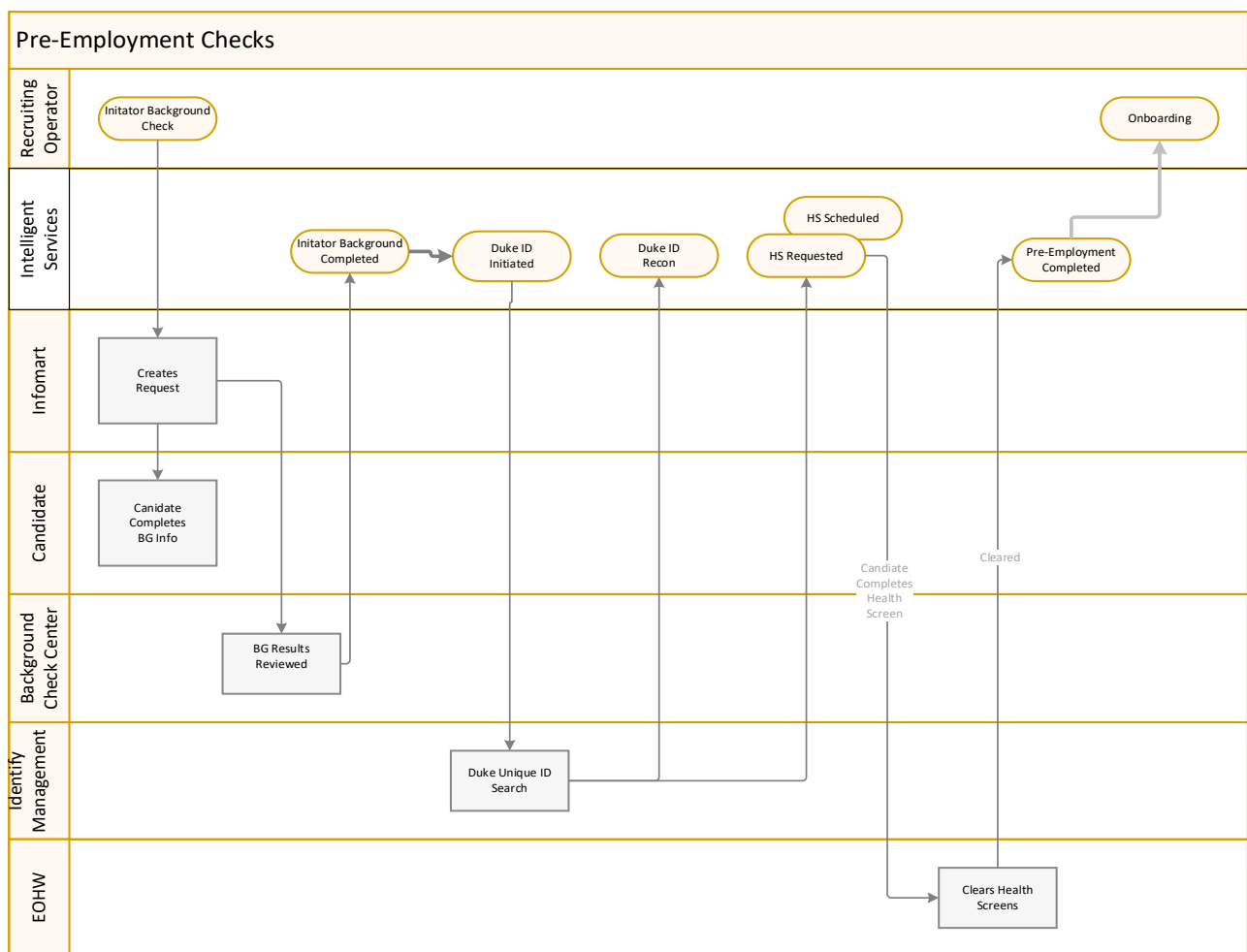
Pre-employment checks consists of the following steps: Background Check, DUID request and Health Screening. These steps are interacting with resources both internal and external to Duke as well as groups outside of the recruiting process. **The Onboarding Team member only has to submit the background check or move the candidate to HS Requested. Intelligent Services moves them through the rest of the process.**

- The Onboarding Team Member will move the candidate to background check awaiting step and initiates the background check using take action menu. This will move the candidate to Background Check submitted.
- Intelligent Services will move the candidate from Background Check submitted to Background Check in Progress or BGC Received.
- The Background Check Center will move the candidate from BGC Received to the BGC Completed after reviewing the results.

## SUCCESSFACTORS: PRE-EMPLOYMENT STEPS

- Intelligent Services moves the candidate from BGC Completed to Duke Unique Id initiated status. This will perform a DUID search and move the candidate to Duke ID Recon or Duke ID Completed.
- Intelligent Services will move the candidate from Duke ID Completed to Health Screen Requested or Pre-Employment completed.
- EOHW will move the candidate from HS Requested to HS Scheduled and to Pre-Employment Checks Completed.
- Intelligent Services will move the candidate from Pre-Employment Completed to the Onboarding pipeline step.

See the following diagram for an illustration of the candidate flow through the pipeline for Pre-Employment Steps.



## EMAILS

Emails are sent to the Hiring Team when a candidate moves to the following statuses:

- BGC Completed
- Duke ID Recon
- Duke ID Completed
- Pre-Employment Completed
- HS No Show\*
- HS Accommodation
- Integration Error\*

The statuses with an asterisk are exceptions and indicate special actions need to be taken to move the candidate forward. The last section of this guide is on handling errors.

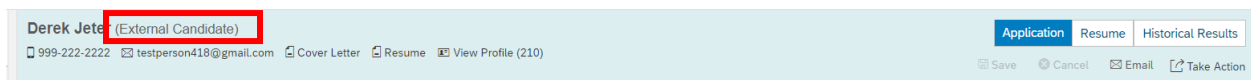
- **HS No Show** means the candidate missed the Health Screening appointment without any.
- **HS Accommodation** has been requested and is being reviewed.
- **Integration Errors** are triggered by issues with a particular request. For example the candidate has applied as an external candidate but are a current employee.

## ACTION REQUIRED FOR NEW HIRES (EXTERNAL CANDIDATES)

External candidates are identified by the yellow icon next to the name in the list view of the candidates....



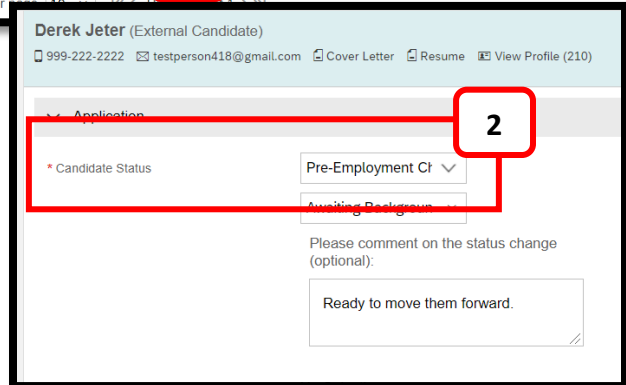
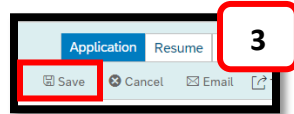
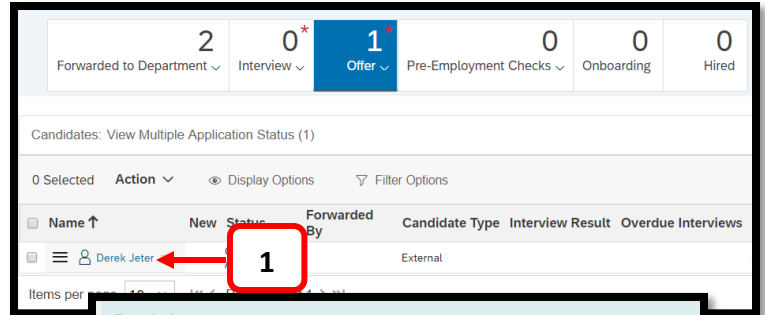
Or, **(External Candidate)** next to the name in the job application.



- Move candidate from Offer/ Offer Accepted to Pre-Employment Checks / Awaiting Background Check
- Initiate Background Check
- Intelligent Services will move the Candidates through the remaining steps. No action is required on your part unless errors are encountered.

## SUCCESSFACTORS: PRE-EMPLOYMENT STEPS

1. Your Talent Pipeline will look similar to this with one person in the Offer/Offer Accepted status. Select the **Candidate's Name** and the job application will display.
2. Use the **Candidate Status** drop-down to select **Pre-Employment Checks** and **Awaiting Background Checks** from the second drop-down.
3. Click **Save**.

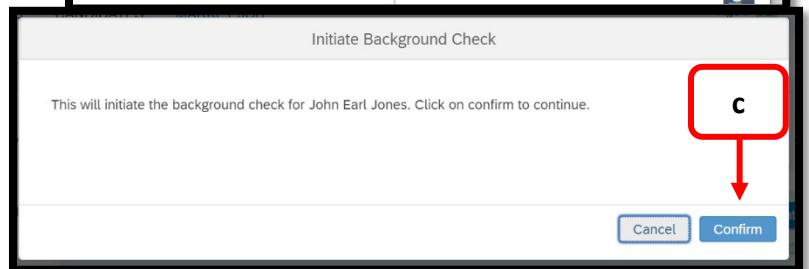
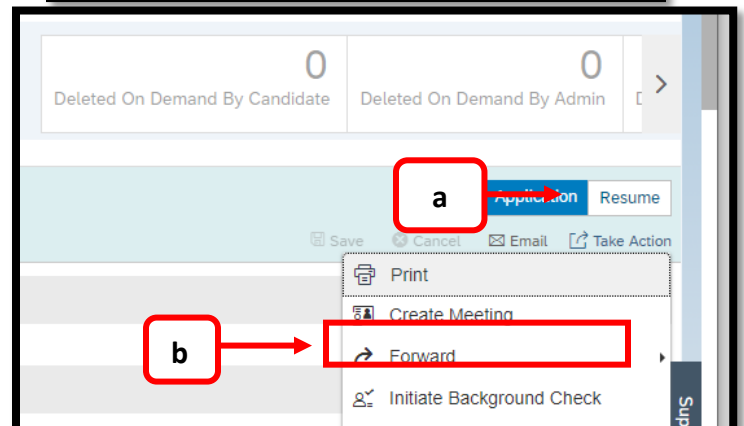


### BACKGROUND CHECK

- a. Click **Take Action** on the right side of the job application and select it. It opens a popup window.
- b. Select **Initiate Background Check**.
- c. A popup will ask you to confirm. Click **Confirm**.

A similar pop-up box will show a success message with an option to notify the candidates via email to look for a **Background Check Invite**.

The background check has been submitted. The status of the request will move to Background Check Submitted until the candidate responds and it will be moved to Background Check in Process. When a report is received from Infomart, the status will move to BGC Results Received. It will remain in this step until the Background Check Center moves it to Back Ground Check completed.

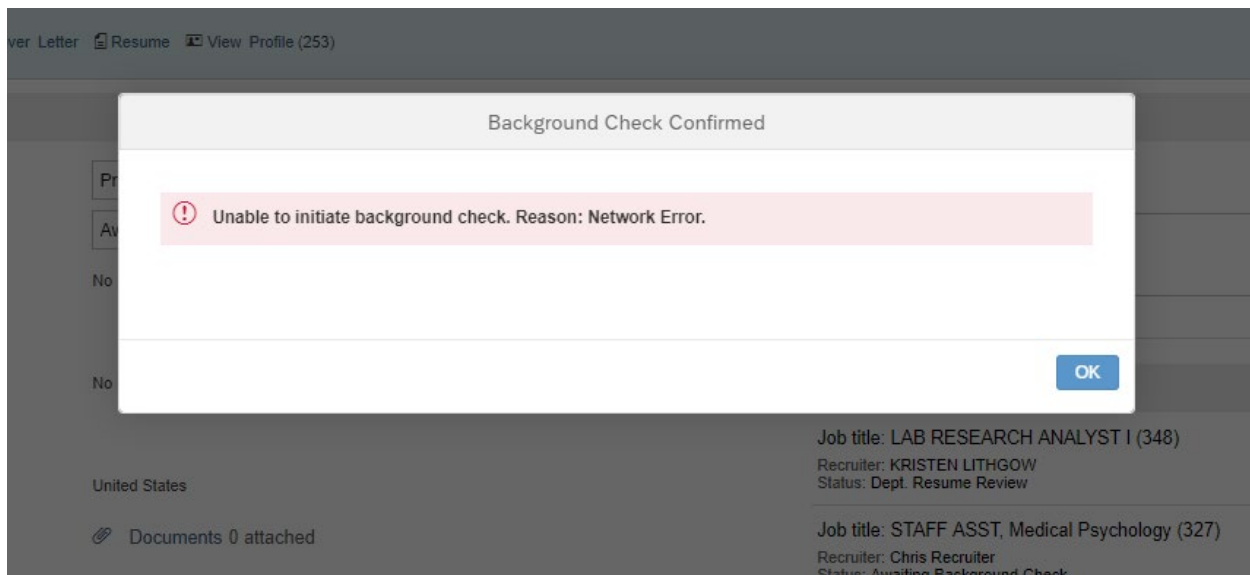


## Network Error in Background Check Submission

If the candidate does not have an Approved Offer Approval, the system will return the following message when initiating the Background check – **Unable to Initiate Background Check.**

**Reason: Network Error.**

To correct this error, submit Offer Approval and have it approved by the appropriate person depending on your local policies. *The Offer Approval is available from the Awaiting Background Check status using the Take Action Menu. There is no need to move the candidate to another status to create the Offer Approval.*



## DUKE ID REQUEST

Intelligent Services will move the candidate from Background Completed to Duke ID Initiated and will trigger a request for a DUID and NETID using information from the background check and candidate job application. If additional research is required to determine if the candidate has been at Duke before, then it will move to the Duke ID Recon status. Once a DUID is returned, the Hiring Team will receive a confirmation email from SuccessFactors in addition to the one from Identity Management. The status will move from Duke ID Completed to either HS Screen requested or Pre-Employment Completed.

## HEALTH SCREEN REQUESTED

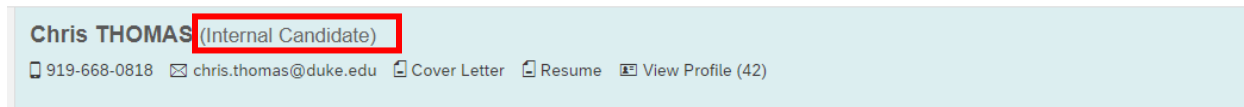
EOHW will use the candidates in the HS Requested and HS Scheduled statuses to manage appointments. **This does not change how candidate or others scheduling on their behalf interact with EOHW.** It provides an authoritative list of who needs a Health Screen. EOHW will clear candidates from the Health Screen Scheduled statuses to Pre-Employment checks cleared. Once a candidate is moved to HS Requested status, the candidate cannot be advanced by recruiting operators.

## ACTION REQUIRED FOR NEW HIRES (EXTERNAL CANDIDATES)

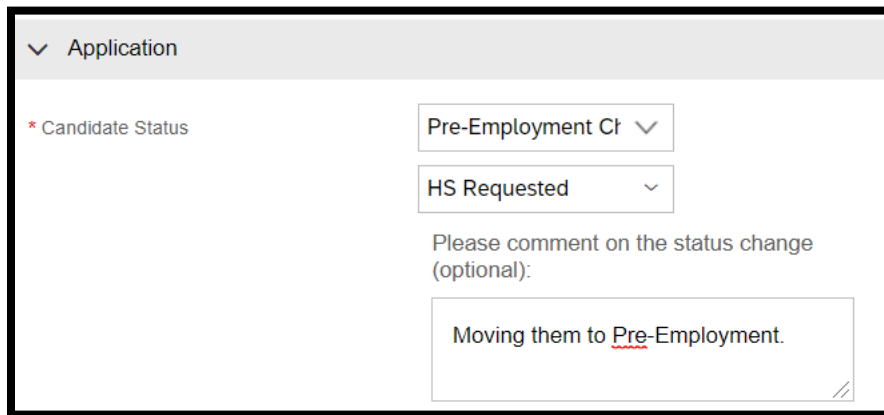
Internal candidates are noted by a blue icon next to the name in the list view of the candidates ...



... or **(Internal Candidate)** next to the name in the job application as noted below.



- Move the candidate from Offer/ Offer Accepted to Health Screen Requested. This will be the only option in the dropdown for Internal Candidates.

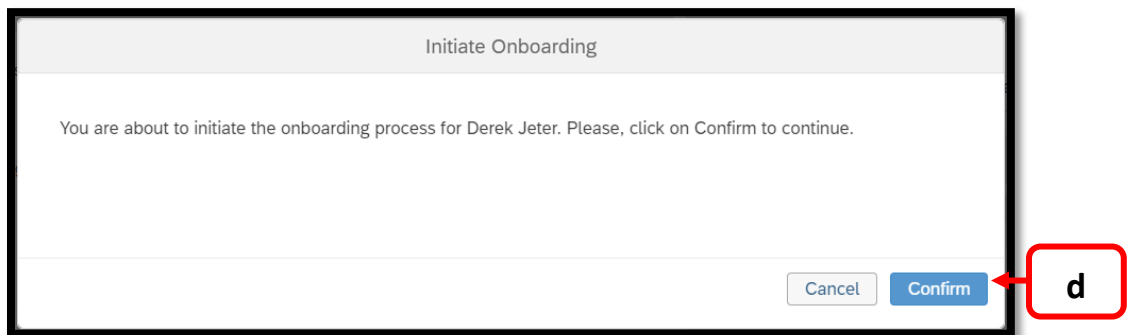
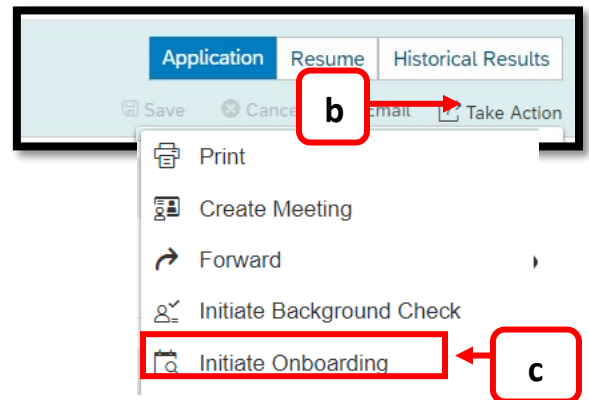
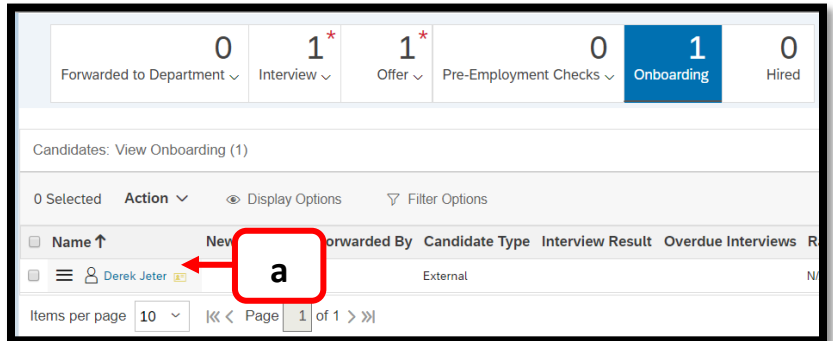


- Intelligent Services will move the Candidates to Pre-Employment Completed to Onboarding if a Health Screen it is not required. No action is required on your part unless errors are encountered.

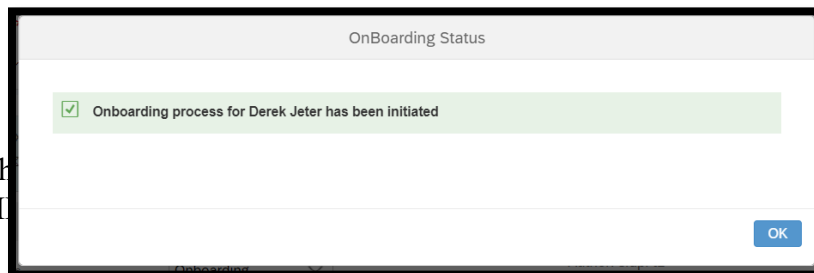
### Moving to Onboarding (Internal and External Candidates)

Once Intelligent Services moves the candidate to the Onboarding Pipeline Step there is one more action to move the candidate to the Onboarding module.

- Select the **Candidate's Name** to open the job application.
- Click **Take Action**.
- Select **Initiation Onboarding** from the list.
- A popup box will ask you to confirm you are ready to Initiate Onboarding.



After Confirming you get this message.



The candidate has

complete the H onboarding and the candidate.



## INTEGRATION ERROR STATUS AND OTHER SPECIAL CIRCUMSTANCES

Integration errors are returned based on inconsistent or missing data in the candidate job application and trigger emails to the Onboarding Team. The errors can include the following:

- External candidate has an active employee record.
  - a. This can be caused by someone who worked for Duke in the past but do not consider themselves an employee. In this case, it would be best to terminate that employee in iForms and continue with the hire.
  - b. The employee made a mistake an applied externally. They will need to reapply as an internal candidate. There is no way to convert the candidate to an internal candidate.
- Offer approval missing on Internal Candidate.
  - a. Submit an Offer Approval for the candidate.

### HS No Show Status

The candidate did not show up for the appointment. The appropriate person on the Onboarding Team should contact the candidate and determine the next steps.

- Obtain new appointment by moving candidate back to HS Requested
- Disqualify candidate with appropriate documentation.

### HS Accommodation

This is an informational message that the candidate has requested an accommodation.

If you have questions about the Pre-Employment Steps, 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>.