

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,
- 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.

- 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.

Recruiting

Search for actions or people

Eunice Armstrong

SAP SuccessFactors

Job Requisitions | Preferences | Candidates | Interview Central | Interview Scheduling

Job Requisitions

Offer Approvals | RMK Dashboard

0 Candidates Forwarded | 5 New Candidates | 2 Current External Requisitions | 0 Current Internal Requisitions | Average Days Open: 0

Items per page: 10 | Page 1 of 1

Filter Job Requisitions: All job requisitions | Filter Options | Display Options | Highlight Job Title: Highlight Job Title

Select All	Job Title	Requisition ID ↑	Org Chief	Currently With	Due	Candidates	Progress	Updated
<input type="checkbox"/>	Dietitian - 2744	2744	Eunice Armstrong		11/09/2017	6 (5 New)	<div style="width: 20%;"></div>	12/20/20
<input type="checkbox"/>	Dietician DEV	2706			11/06/2017	1	<div style="width: 100%;"></div>	11/07/20

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 screenshot shows the SAP SuccessFactors Recruiting interface. At the top, there is a navigation bar with a home icon, 'Recruiting' dropdown, a search bar for actions or people, a notification bell, a profile icon for Eunice Armstrong, and the SAP SuccessFactors logo. Below the navigation bar are tabs for 'Job Requisitions', 'Preferences', 'Candidates', 'Interview Central', and 'Interview Scheduling'. The main content area is titled 'WRHA Requisition for Dietitian - 2744'. It features a sub-navigation bar with tabs: 'JOB REQUISITION DETAIL', 'JOB PROFILE', 'CANDIDATES (6)', 'JOB POSTINGS (1)', and 'CANDIDATE SEARCH'. The 'CANDIDATES (6)' tab is highlighted with a red box. To the right of the tabs are icons for a list and information. Below the tabs are links for 'Internal Posting Preview' and 'External Posting Preview'. The main content area is divided into two sections: 'Requisition Information' and 'Position Info (SAP)'. The 'Requisition Information' section contains the following details:

* Requisition ID	2744
* Requisition Status	Open <input type="button" value="v"/> <input style="float: right;" type="button" value="?"/>

The 'Position Info (SAP)' section contains the following details:

* Position Number	20056688
* Position Title	Dietitian - 2744
* External Posting Title	Dietitian - 2744



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.

Dietitian - 2744 (2744) [View Details](#)

JOB PROFILE **CANDIDATES** JOB POSTINGS (1) CANDIDATE SEARCH MARKET JOB

Status: Org Chief: Eunice Armstrong Age: 0d

▼ Talent Pipeline [View active candidates \(6\)](#) [View all candidates \(6\)](#)

0	0	3	1	1	1	0*	0*	0	0
Forwarded	Invited To Apply	New Applicant Review	Short List	Interviews ▼	Reference Checks	Offer ▼	SAP ▼	Hired	Do Not Proceed >

Candidates : View Reference Checks (1)

0 Selected **Action** ▼ Display Options Filter Options Highlight Candidate

<input checked="" type="checkbox"/>	Name ↑	New Status	Forwarded By	Candidate Type	Interview Result	Overdue Interviews	Rating	Source	Candidate Source
<input checked="" type="checkbox"/>	Josh Johnson	Reference Checks		External			N/A	Corporate: WRHA External Career Portal	Corporate: WRHA External Career F

Items per page: Page of 1

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

Dietitian - 2744 (2744) [View Details](#)

JOB PROFILE CANDIDATES JOB POSTINGS (1) CANDIDATE SEARCH MARKET JOB

Status: Org Chief : Eunice Armstrong Age : 0d

▼ Talent Pipeline [View active candidates \(6\)](#) [View all candidates \(6\)](#)

0	0	3	1	1	1	0*	0*	0	0
Forwarded	Invited To Apply	New Applicant Review	Short List	Interviews ▼	Reference Checks	Offer ▼	SAP ▼	Hired	Do Not Proceed

Candidates : [View Reference Checks \(1\)](#)

1 Selected **Action** ▼ Display Options Filter Options Highlight Candidate

<input checked="" type="checkbox"/> Name ↑	Forwarded By	Candidate Type	Interview Result	Overdue Interviews	Rating	Source	Candidate Source
<input checked="" type="checkbox"/> Josh .		External			N/A	Corporate: WRHA External Career Portal	Corporate: WRHA External Care

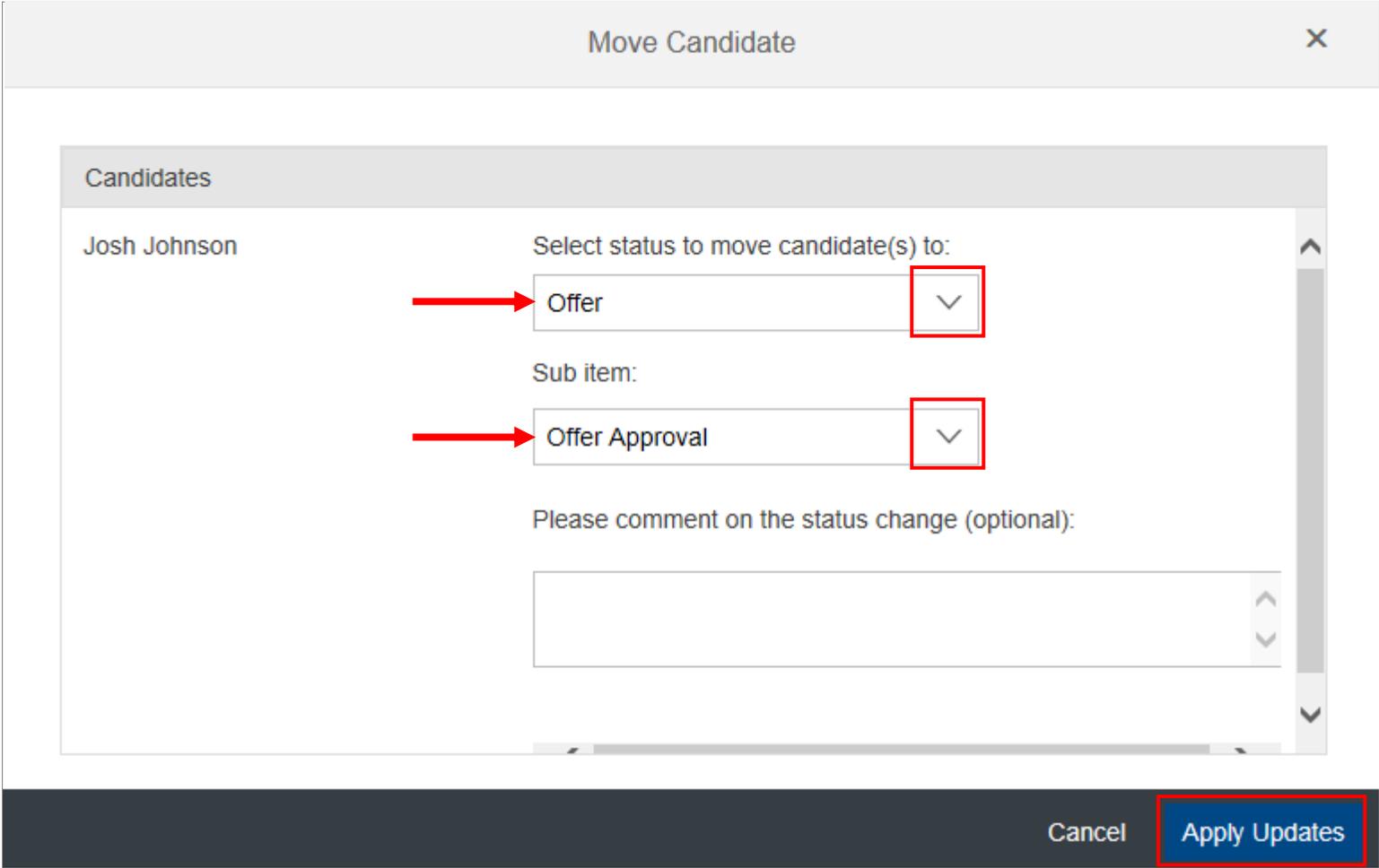
Items per page: 1 > >>

- ✓ Advance Candidate
- ⊖ Disqualify Candidate
- 🔄 Move Candidate**
- ✉ Email Candidate
- 📄 Add To Requisition
- 📄 Invite Late Stage Applicant
- 📄 Invite to Apply
- 🖨 Print or Save
- 📄 Forward To Colleague
- 📄 Forward To Requisitions
- 📄 View Resume

Copyright © 2017 SuccessFactors. All rights reserved. [View information.](#) Online services are SuccessFactors confidential and proprietary and for use by authorized SuccessFactors customers only. [Show version](#)

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



Move Candidate

Candidates

Josh Johnson

Select status to move candidate(s) to:

Offer

Sub item:

Offer Approval

Please comment on the status change (optional):

Cancel Apply Updates

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**.

▾ Talent Pipeline [View active candidates \(6\)](#) [View all candidates \(6\)](#)

0 Forwarded	0 Invited To Apply	3 New Applicant Review	1 Short List	1 Interviews ▾	0 Reference Checks	1* Offer ▾
----------------	-----------------------	---------------------------	-----------------	-------------------	-----------------------	---------------

Candidates : View Multiple Application Status (1)

0 Selected **Action ▾** [Display Options](#) [Filter Options](#)

<input type="checkbox"/>	Name ↑	New Status	Forwarded By	Candidate Type	Interview Result	Overdue Interviews	Rating Source
<input type="checkbox"/>	👤 Josh Johnson ⚙️	Offer Approval		External			N/A Corporate: W

< Items per page 10 ▾ [⏪](#) < Page 1 of 1 > [⏩](#)

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.

Talent Pipeline [View active candidates \(6\)](#) [View all candidates \(6\)](#)

0 Forwarded	0 Invited To Apply	3 New Applicant Review	1 Short List	1 Interviews	0 Reference Checks	1* Offer	0* SAP	0 Hired	0 Do Not Proceed
----------------	-----------------------	---------------------------	-----------------	-----------------	-----------------------	-------------	-----------	------------	---------------------

Candidates : View Multiple Application Status (1)

0 Selected **Action**
 Filter Options

Name
 Josh Johnson

Josh Johnson (External Candidate)
 204555-2525 | jjohnson@yopmail.com | Cover Letter | Resume | View Profile
 Save | Cancel | Email | Take Action

Application | **Comments** + Add

* Status: Offer | Offer Approval
 Author: Eunice Armstrong | Date: 6/20/18

Additional Documents [Attach a document](#)

ADDITIONAL INFORMATION

How did you hear about this job? Employee Referral
 Are you legally authorized to work in Canada? I am authorized to work in this country for any employer

New comment
 This new position is an additional assignment, not a transfer.

Correspondence

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 screenshot displays the SuccessFactors interface for a candidate named Josh Johnson. At the top, there is a 'Talent Pipeline' section with a navigation bar containing several status boxes: Forwarded (0), Invited To Apply (0), New Applicant Review (3), Short List (1), Interviews (1), Reference Checks (0), Offer (1*), SAP (0*), Hired (0), and Do Not Proceed (0). Below this, the candidate's profile is shown with contact information and a 'Take Action' button. A dropdown menu is open from the 'Take Action' button, listing various actions such as Print, Forward, History, Reopen for Consideration, Close From Consideration, Invite Candidate to Apply, Add To Requisition, Move Candidate, Invite Late Stage Applicant, and Return to List. The 'Offer Approval' option is highlighted in the menu, and a sub-menu is visible showing 'Offer' and 'Offer Approval' options.

The Offer Approval screen appears.

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

Offer Approval: Josh Johnson for Dietitian - 2744

Save Cancel Print Preview

Offer Details: Version 1

Language	English
Select Offer Template*	Offer Approval
Requisition ID	2744
Position Title	Dietitian - 2744
Position Number*	20056688
Legal First Name*	Josh
Last Name*	Johnson

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 unknown 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.

* Start Date	<input type="text" value="MM/dd/yyyy"/>		
Term End Date	<input type="text" value="MM/dd/yyyy"/>		
* Anticipated Shift	<input type="text" value="Days;Evenings"/>		
Hourly Min	25.28		
Hourly Mid	31.67		
Hourly Max	33.48		
Previous Incumbent's Work Schedule	FLEX1		
* Work Schedule Rule	<input type="text" value="FLEX1"/>		
Previous Incumbent's Timekeeper ID	001		
* Timekeeper ID	<input type="text" value="001"/>		

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](#).

Step on Scale*	<input type="text" value="3"/>	
Hourly Rate*	<input type="text" value="32.703"/>	
Annual Base Hours	<input type="text" value="1950"/>	
FTE*	<input type="text" value="0.40"/>	
Is this an underfill?*	<input type="text" value="No"/>	
If yes, please provide more information	<input type="text"/>	
Vacation*	<input type="text" value="3 Weeks"/>	
On Call	<input type="text" value="No"/>	
If a requirement of the position, have you verified the candidate's license/registration*	<input type="text" value="Yes"/>	
If yes, licensing/registering body	<input type="text" value="CDM - College of Dietitians of Manitoba"/>	
If yes, license/registration number	<input type="text" value="12345"/>	
If yes, license/registration expiry date	<input type="text" value="12/31/2018"/>	
Have you verified the candidate's education*	<input type="text" value="Yes"/>	
Other Information	<input type="text"/>	

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**.

Approvers: Version 1

Status Draft

* Ad hoc approver 1 Eunice Find User.. + Add Another

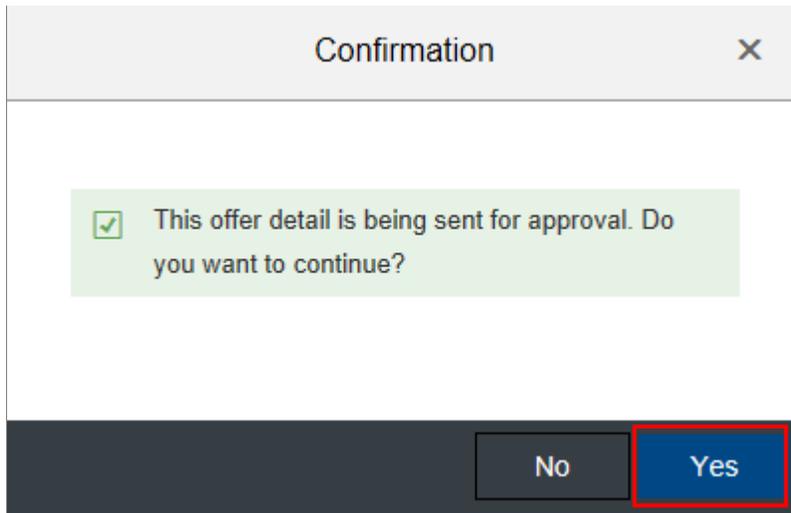
Comment

Eunice Armstrong (N/A, N/A)

Back to Candidate Back to Candidate List Save Send For Approval

A *Confirmation* pop-up window appears.

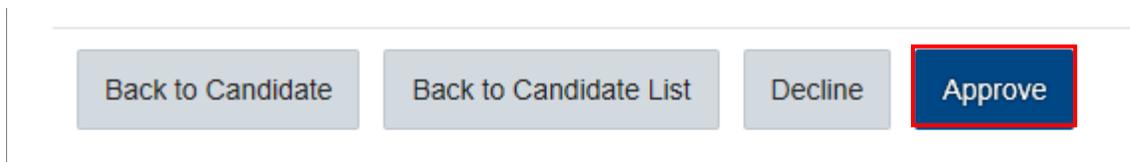
23. Click **Yes**.



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.

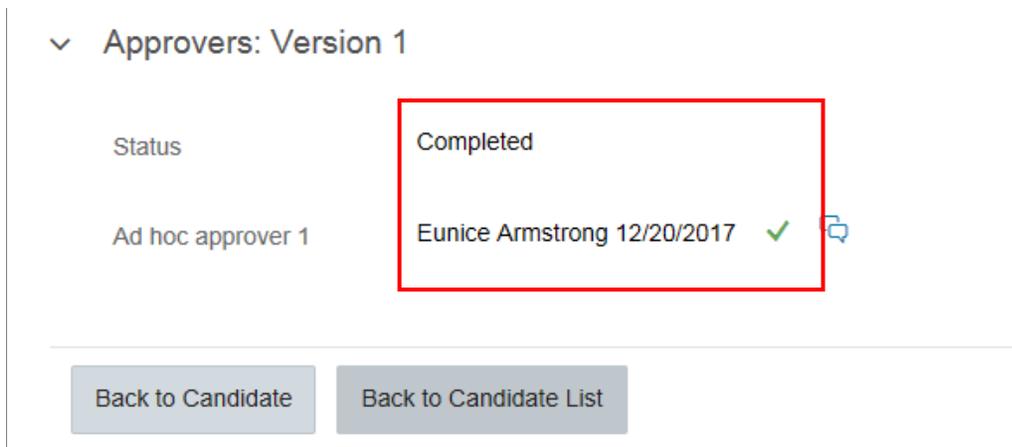
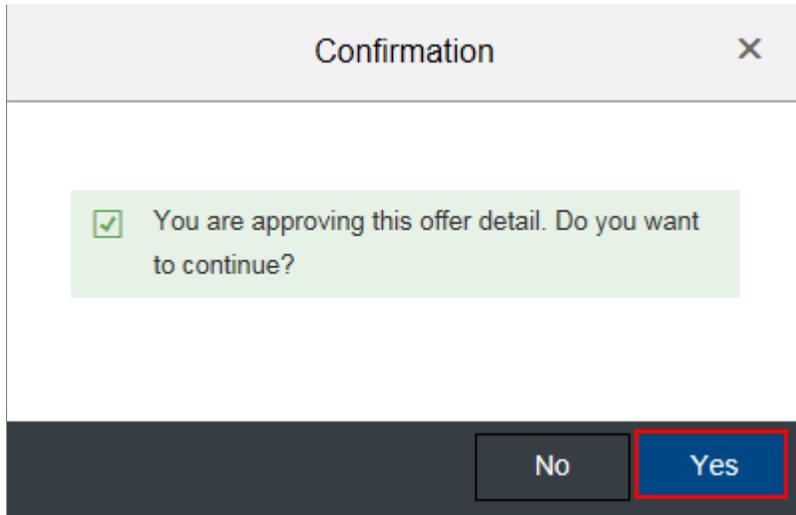
If you identified yourself as the approver in step 20, the *Send for Approval* button now displays *Approve*.

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.