Talent Acquisition User Guide

Direct Appointment

Contents

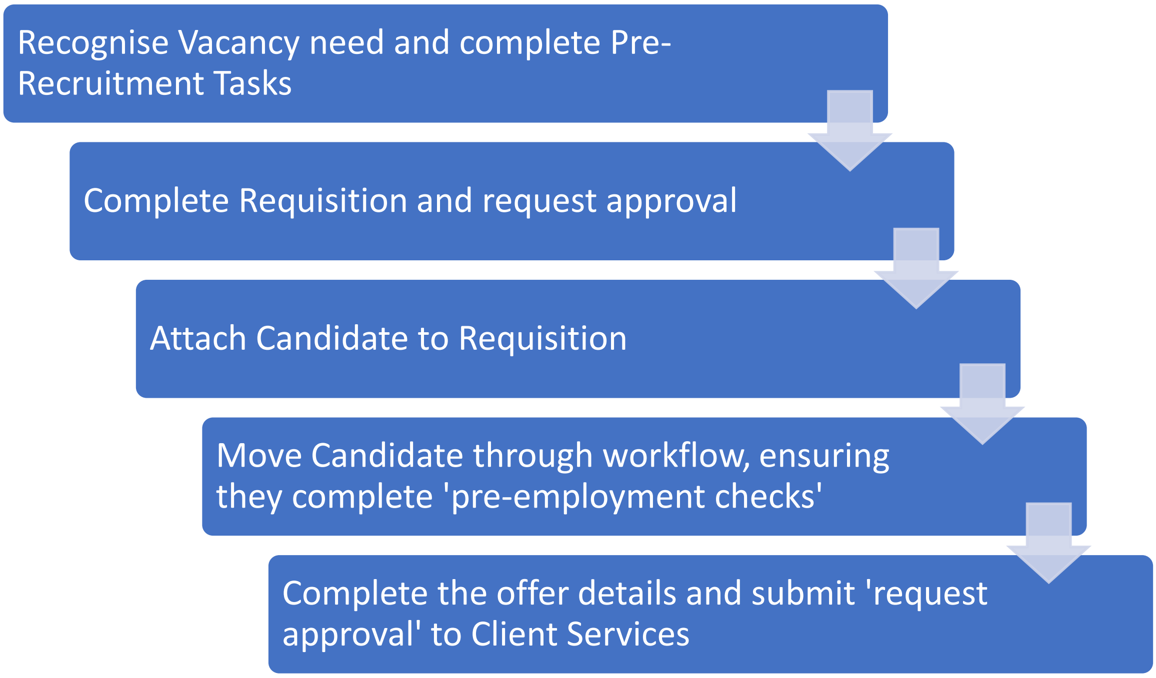
Introduction

The Purpose of this User Guide is to support the End User in the step by step guide to actioning a direct appointment in the eRecruitment system.

Definitions

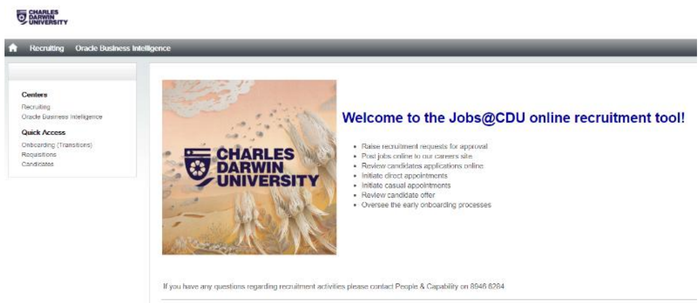
Talent Acquisition	-	This is the Recruitment system used to find and onboard new staff, direct appointments and casuals
Ascender	-	This is the current payroll system used for all position management, paying employees and employee management
Requisition	-	This is the term used to represent a 'job'
Candidate Selection Workflow	-	This is the process that an employee/candidate will go through as part of the recruitment process

Steps



Recruitment

Log In

Step	Instruction	Screen shot
1	Click on this link to access the system http://cdu.taleo.net You will be asked to log in with a username and password. If you have forgotten your username and password, follow the links and instructions on the page	
2	Once logged in, you will be taken to the Welcome Centre. This will allow you to navigate to the part of the system you wish to access. Recruiting – Click here generate a job to advertise or view current open vacancies Candidates – Click here to access your candidate	

Initiate Recruitment

Approvals and position creation sit outside of Talent Acquisition. Please refer to *User Guide Preparation* for more details.

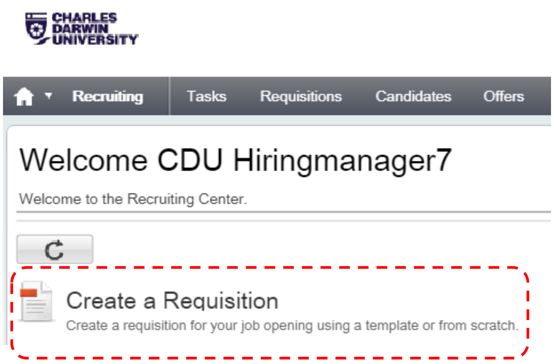
You should already have with you;

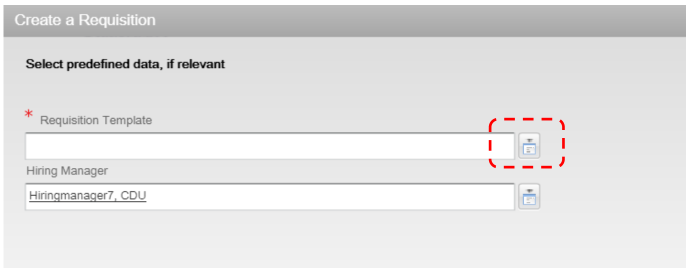
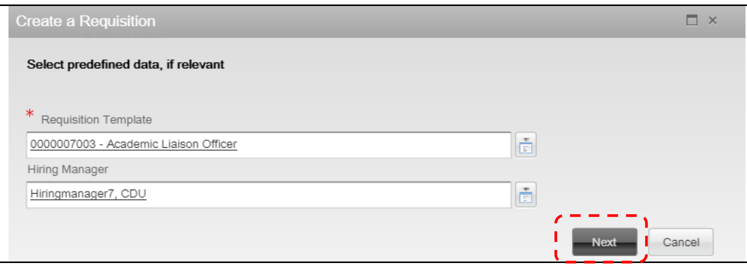
- ☐ Current active position number
- ☐ Updated position profile
- ☐ Management Account Evidence
- ☐ Salary range

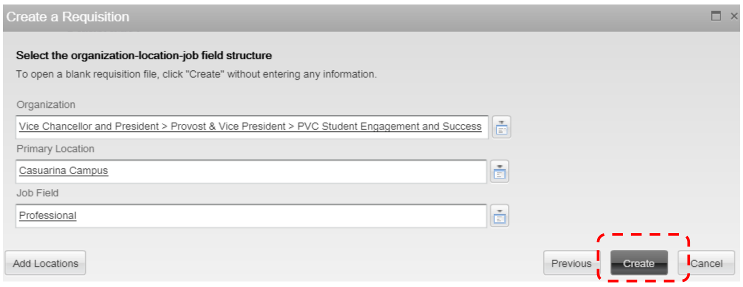
Create a Requisition

<table>
<tr><th>Step</th><th>Instruction</th><th>Screen shot</th></tr>
<tr><td>1</td><td>Navigate to Recruiting

Click on Create Requisition

NOTE: This online form is what was previously known as a RAJ</td><td>
</td></tr>
<tr><td>2</td><td>Select a Position that you wish to recruit for.

Do this by typing in your position no. in the template box or using the selector  to search for your position</td><td>
</td></tr>
<tr><td>3</td><td>Once you have selected your position, click Next.</td><td>
</td></tr>
</table>

4	You will be now asked to confirm that the information regarding the organisation structure, location and job fields are correct. Please contact HR Client Services if the information is incorrect. Click on Create.	

Understanding and Completing a Requisition

The information required for this should be copied over from the applicable Position Profile. This can be found by contacting your HR Client Services Team. Please refer to *User Guide Preparation* for more details.

This symbol * indicates the fields will need to be completed to save progress.

1. Request to Recruit

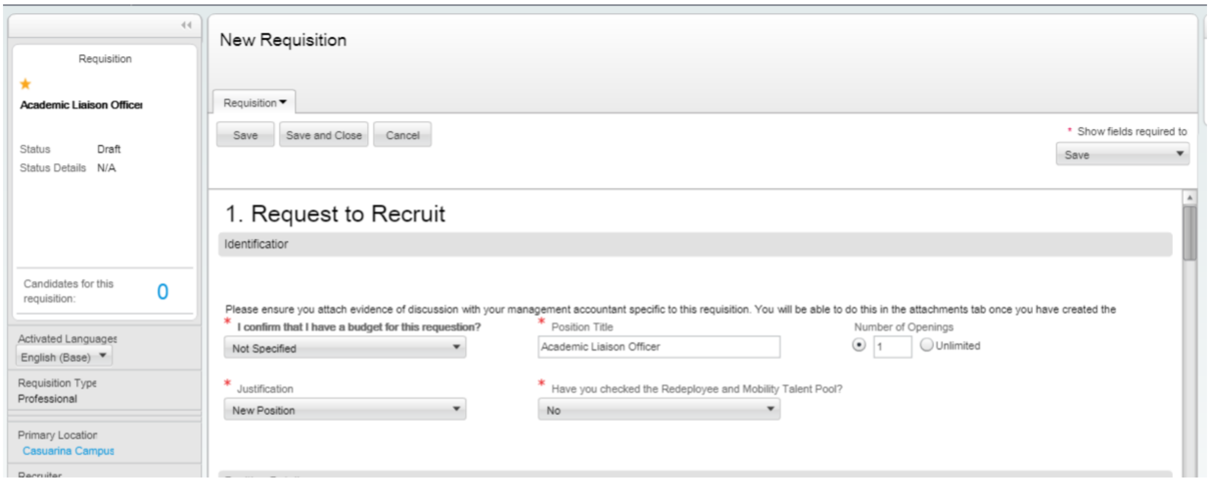
This section is made of 3 key pieces – Identification, Position Details and Additional Information.

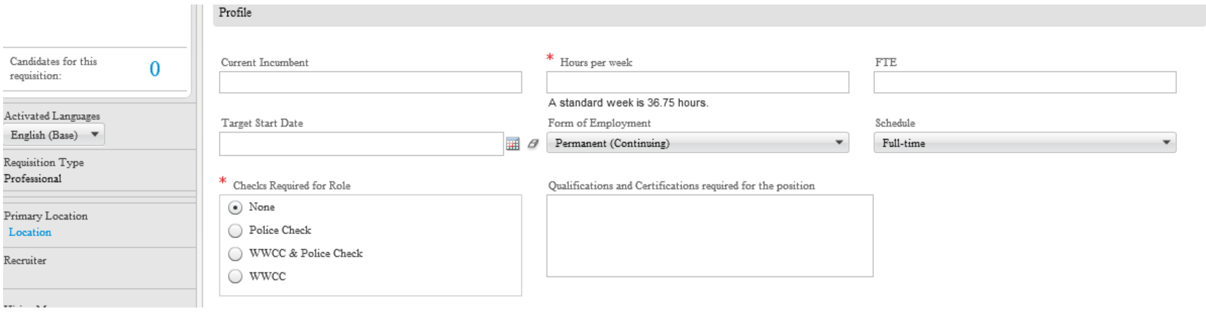
Within the "Request to Recruit" section check the fields for any discrepancies, typos or errors. This information will be published to the job advertisements so ensure all details are accurate.

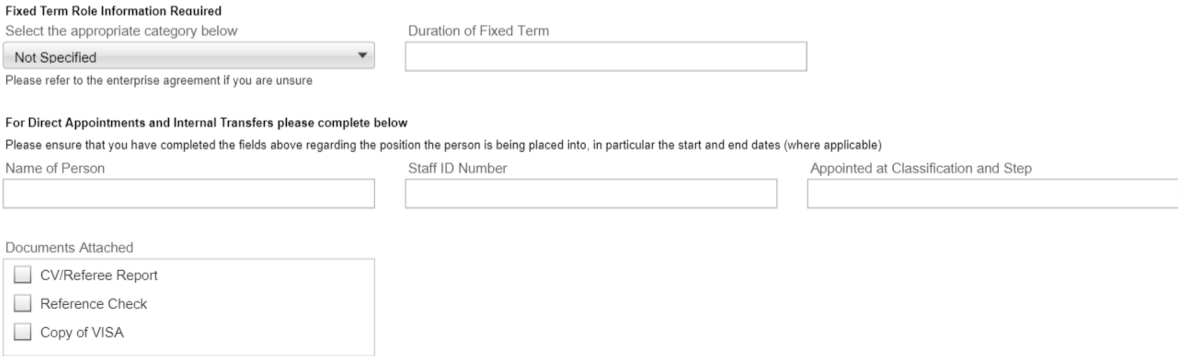
Position Title should be self-populating, no edit required. Please contact HR Client Services if there is any errors.

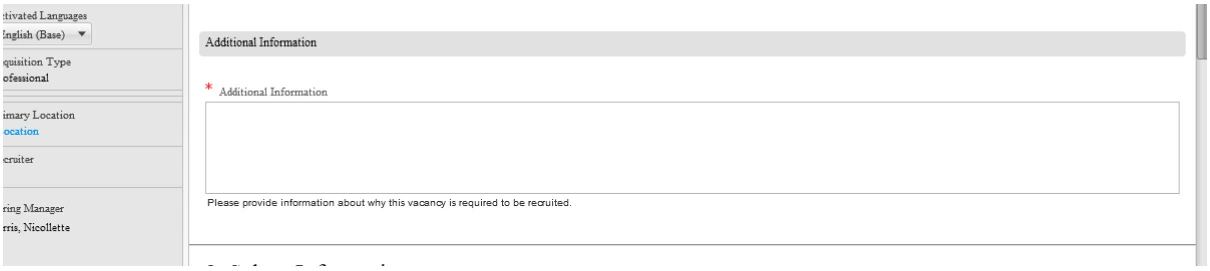
Update and complete other relevant fields.

For a Direct Appointment you are required to complete the section for Direct Appointments.







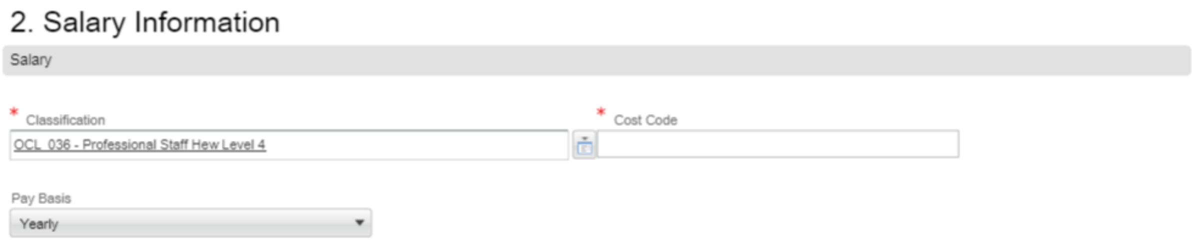


Additional Information is where you write the justification for needing to fill the vacancy. This is also where you should detail and specifics around your direct appointment and candidate.

2. Salary Information

This section will ask you to confirm:

- The Classification for the position – This will be updated from the position profile
- Pay Basis – This outlines if the position is paid hourly (casual) or via a salary
- Cost Code – Here you are to outline which cost centre the position will be costed to. If a position has more than 1 cost centre, please indicate this here with the % split.



3. Position Advertisement

This section asks you to confirm how you are looking to fill the position.

Direct Appointment – You do not need to complete this section

All other roles – You will need to indicate where you wish to advertise the position. You will also need to write your job advertisement in the Internal and External Job Descriptions.

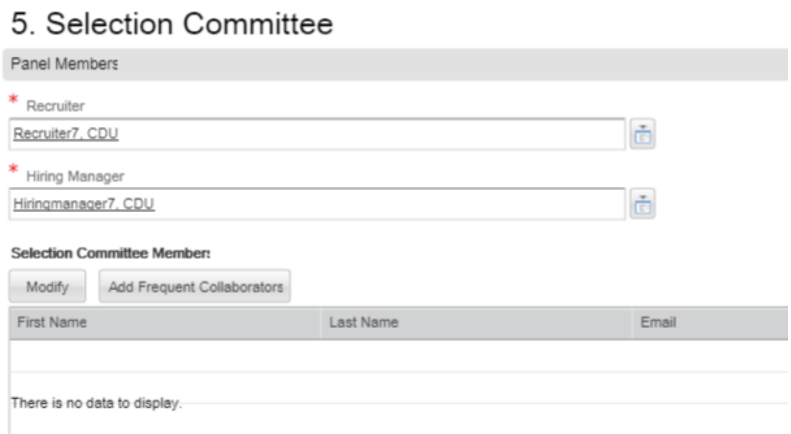
4. Key Selection Criteria

This section is where you will place the job specific questions that the candidate will answer as part of their job application. This is not required for a direct appointment.

5. Selection Committee

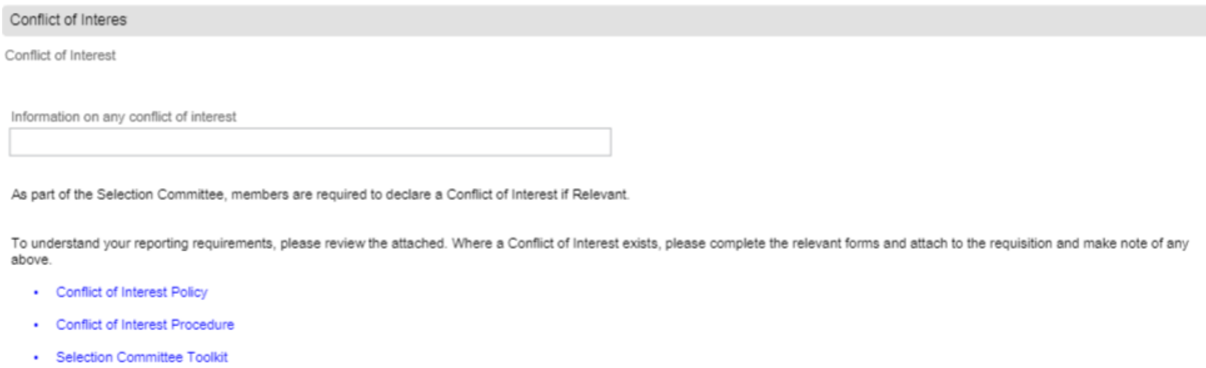
<u>Please update the 'Recruiter' name.</u>

Either enter your name, or the name of someone who may assist you with the Direct Appointment.



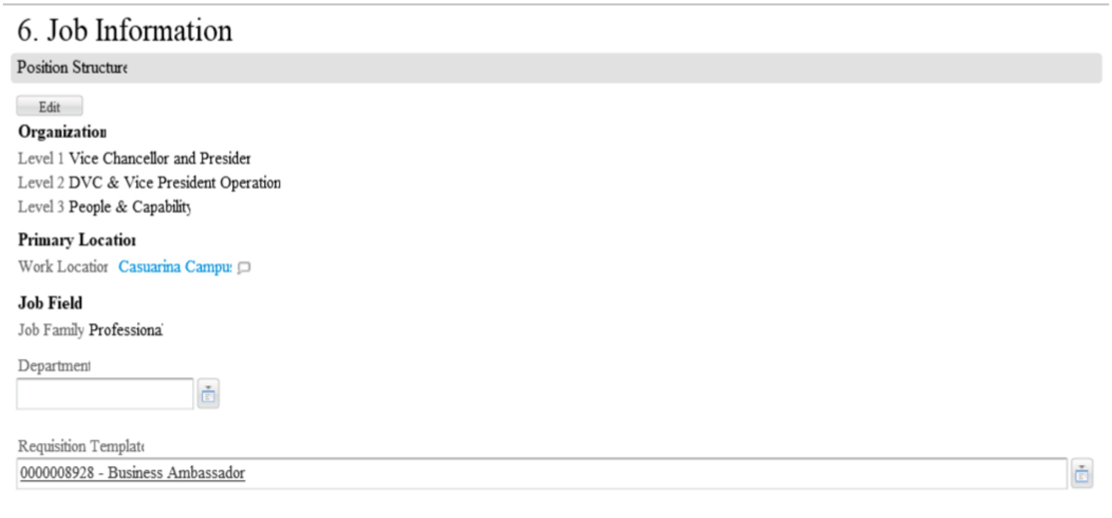
Conflict of Interest

This section is to be used at any time in the recruitment process when a Conflict of Interest is identified by **any** Selection Committee Member.



6. Job Information

This section should be prepopulated and require no changes. Please contact HR Client Services if there are any discrepancies.

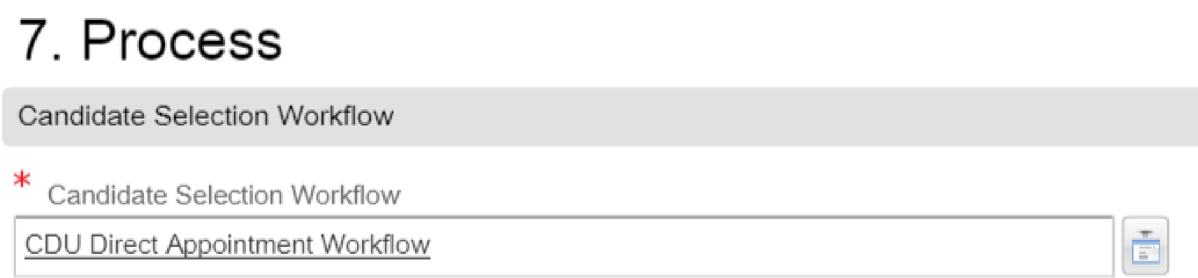


7. Process

This section will allow you to select the appropriate Candidate Selection Workflow. There are 2 options

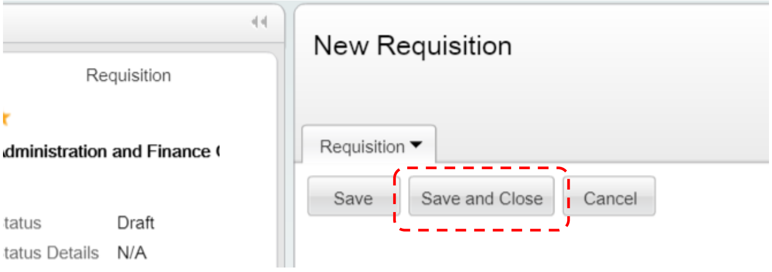
Direct Appointment – For a Direct appointment, select CDU Direct Appointment Workflow

Recruitment – For recruitment, select CDU Candidate Selection Workflow



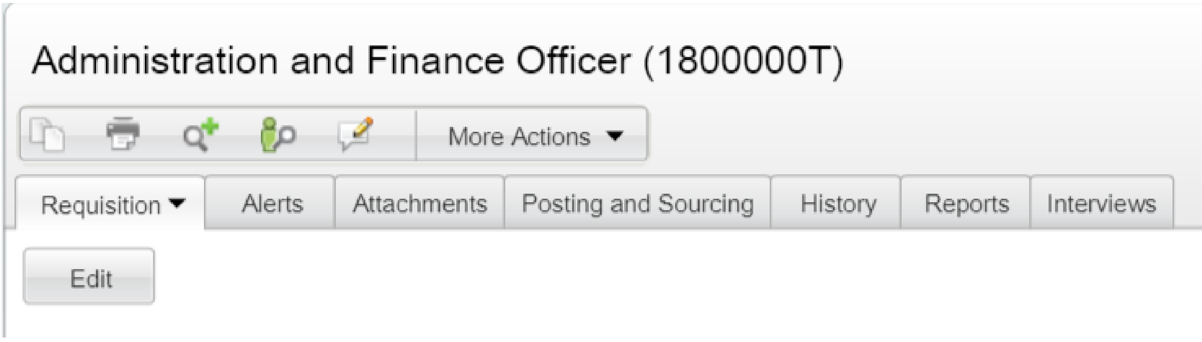
Finish

You have now completed all the fields required for complete your request you now need to send your requisition for approval. Scroll to the top and select Save and Close.



Role Creation and Finalisation

Your role is created when it has been assigned a Requisition number and a number of tabs appear. These tabs allow you to do a range of tasks associated with your requisition.



Explanation of the tabs

Requisition – This is where all of the information regarding the position is stored e.g. title, location

Alerts – This tab allows you to turn on the ACE alert for when candidates apply.

Attachments – This tab allows you to upload information relevant to the position. You will also need to upload your Management Accountant approval here

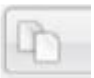
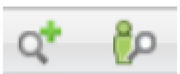
Position and Sourcing – This tab will advertise the role to the internal and external career sections. NOTE: For direct appointment this is not required.

History – This tab will show you the history of the role. For e.g. who created it

Reports – This tab will allow you to set up a daily recruitment report for this role

Interviews – This tab will allow you to select an interview guide for online interviewing NOTE: This will not be rolled out in the initial phase.

Symbols Explained

	This is the duplicate requisition button. It will allow you to duplicate the position when you may have to recruit for it again. A 'time saver' already completing all of the fields for you.
	This allows you to print the requisition. NOTE: It will print it to PDF for you to email, save or print to a printer.
	These icons allow you to search for candidates that might be in the database.
	Allows you to make comments on the requisition at any time throughout the process.

Requisition Approval

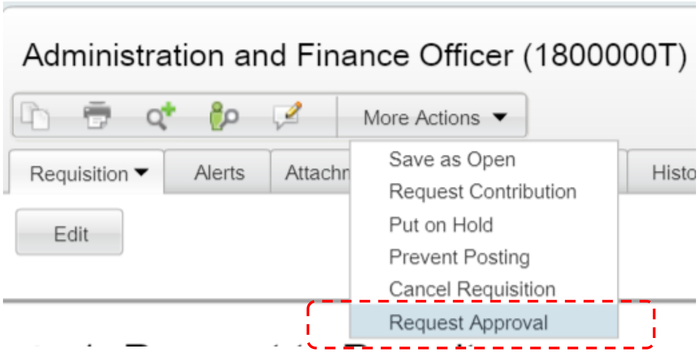
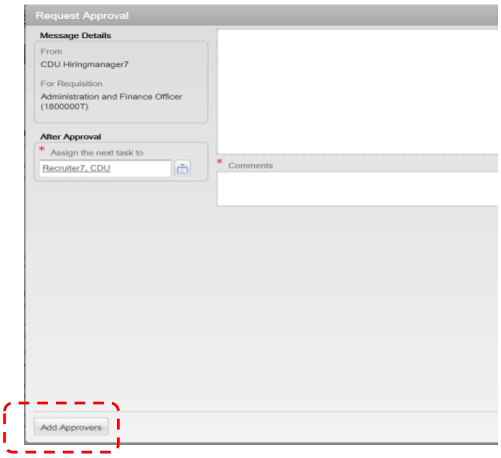
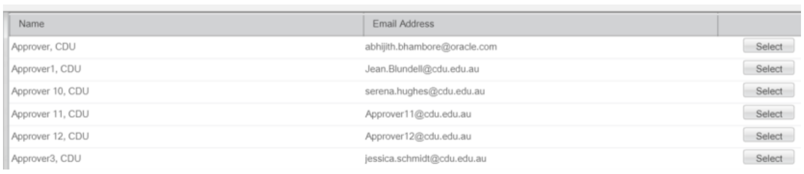
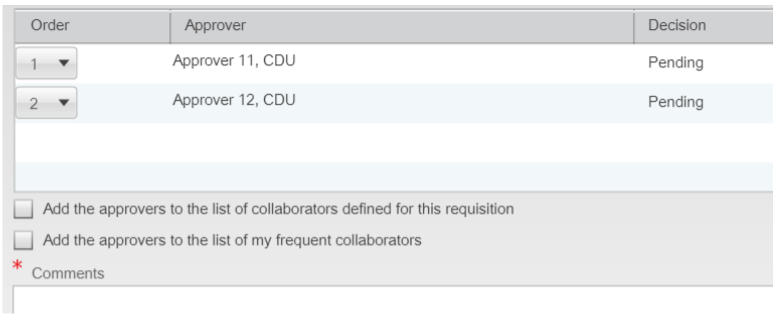
Approvals and position creation sit outside of Talent Acquisition. Please refer to *User Guide Preparation* for more details.

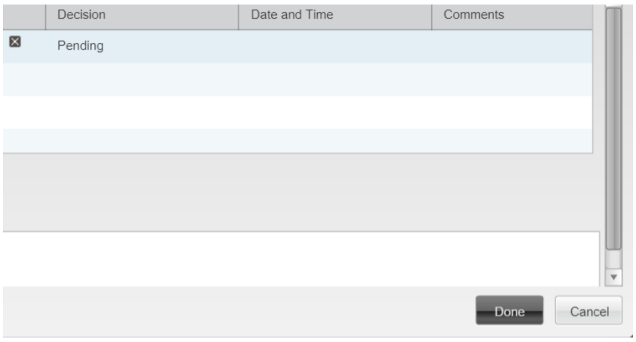
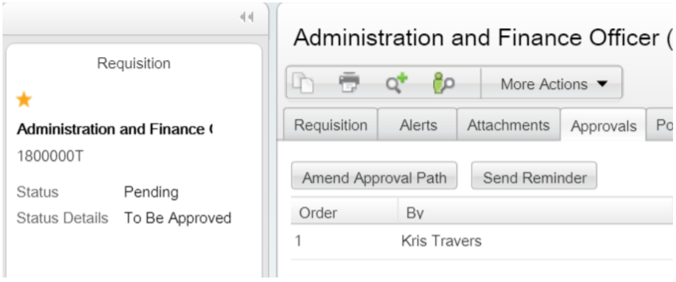
You will need to upload evidence that you have approval from your Management Accountant

Select the tab labelled “Attachments”

Please follow the prompts and upload a copy of your Position Profile and the Evidence from your Management Accountant here. Clearly Title this documents before uploading as this will save time for your Approver when viewing these documents.

Request approval

Step	Instruction	Screen shot
1	Go to More Actions Click on Request Approval	
2	Add your approver/s NOTE: Approvers are added at the bottom left of the screen.	
3	Select the approver/s that need to approve the requisition. To add them to the approval path click on Select.	
4	The approver/s will now appear at the top of the approval screen. Add Comments for the approver. NOTE: If multiple approvers have been selected to re-order, change the numbers in the order.	

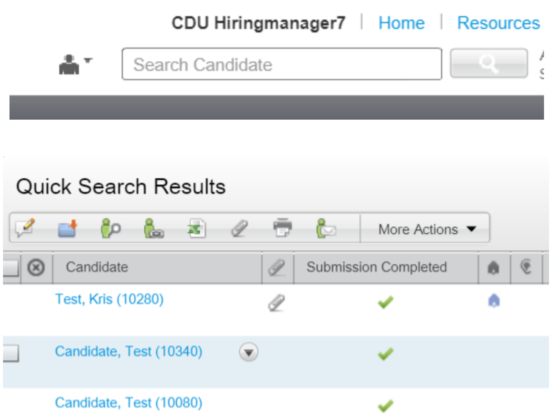
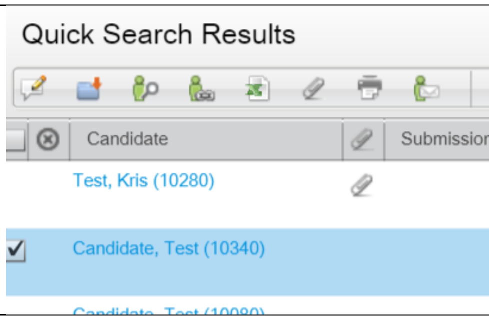
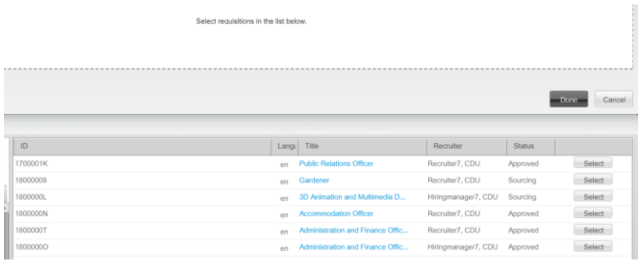
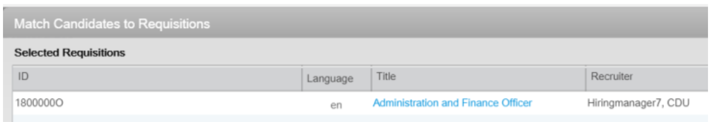
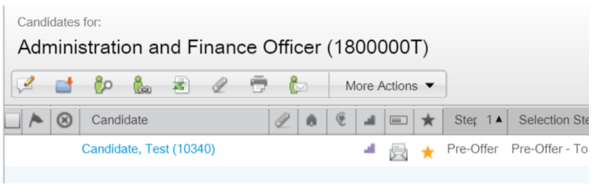
5	When you are finished assigning approvers, click on DONE.	
6	Once sent for approval you will see the status changes to – To Be Approved and an Approvals tab appears. You are able to amend the approval path if someone is absent or you have made a mistake. You can also send reminders to the approvers.	

You will receive notification emails as part of the approval workflow, each time a decision is made about the role. Once the role has completed all the approval steps you are ready to (a) directly appoint your candidate or (b) advertise your role.

Assigning employees for Direct Appointment

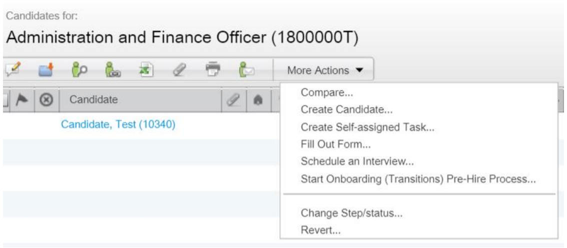
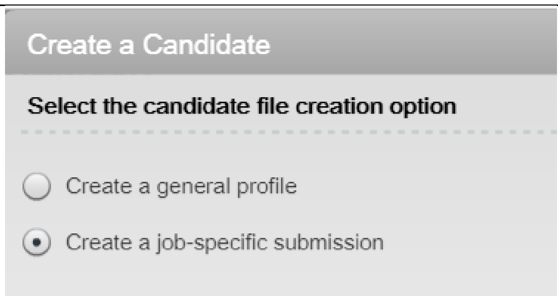
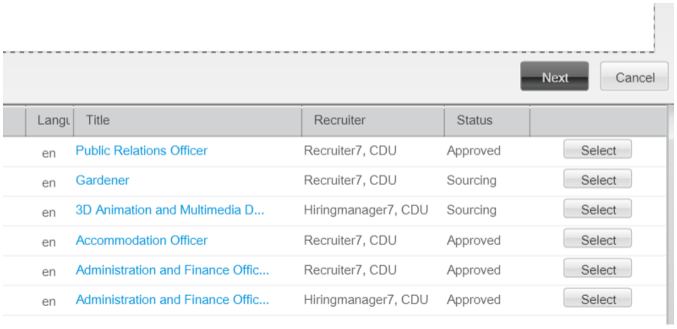
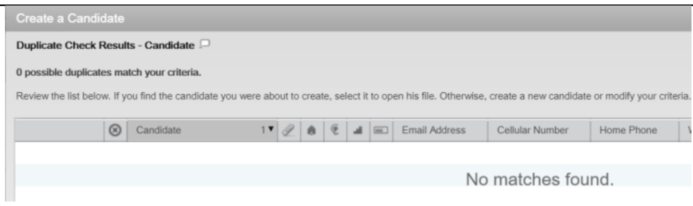
Candidate is in the database

You will need to match the candidate who is to be directly appointed to your requisition.

Step	Instruction	Screen shot
1	Navigate to the candidate search. This can be located in the top right of the screen. Enter the candidates name and click on the magnifying glass. This will display any candidates with that name.	
2	If your candidate is displayed, click on the check box and select the Match Icon 	
3	You will then be asked which position you wish to match them to. Select the position using the Select button, located on the far right.	
4	The position will display in the top half of the screen. Then click on DONE. Navigate back to your role via Requisitions.	
5	The candidate is now directly matched to the role.	

Candidate is note in the database

You will need to create the candidate and match who is to be directly appointed to your requisition.

Step	Instruction	Screen shot
1	In your requisition click on More Actions. Click on Create Candidate.	
2	Create a job specific submission	
3	Select the requisition they need to be placed in. Then follow the prompts to create the candidate.	
4	The system will do a duplicate check. You can then create them, complete the appropriate fields and they will appear in the requisition.	

Direct Appointment Workflow

Once you have matched your candidate to the workflow, you will need to take them through the steps of the process.

The workflow is designed to provide you with a set of status for each step to track where the candidate is up to. They do not trigger activities and are designed to help you know where your candidates are up to, based on where YOU move them to.

The Direct Appointment Workflow is as follows:

Pre Offer

This step allows you initiate the Pre-Offer Checks. This allows the Hiring Manager to get all of the information ready and ensure you have completed all the necessary checks on the candidate.

Offer

This is when the candidate is ready to be offered a position. You will complete the offer grid and send this to HR Client Services for action.

Hire

Client Services will move the candidate to Hire once all contracts and onboarding activities have been completed.

Navigating the workflow

When a candidate applies or is matched to a position, they will be placed in the first step of the workflow. They will also be given a status. For e.g. for Direct Appointment they will be placed in Pre-Offer with the status Pre-Offer to be checked.

The statuses in the workflow are to be used by you as you see fit. They are not compulsory. You will need to select at least 1 status per step to move the candidate forward in the process.

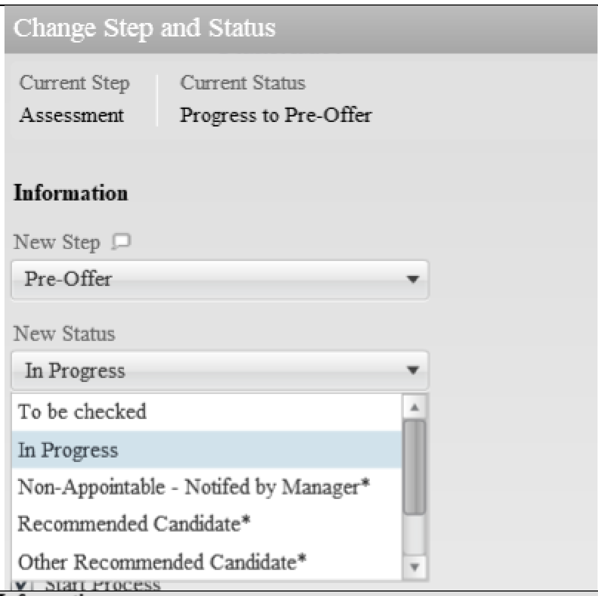
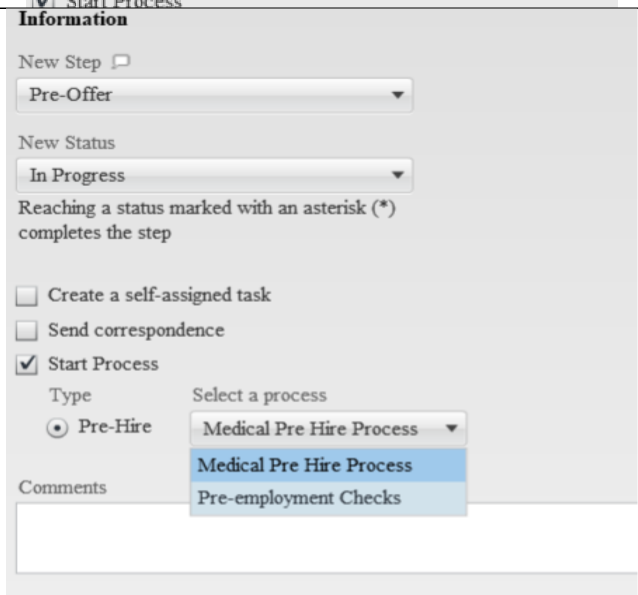
Pre-Offer

This step allows you to initiate the Pre-Offer Checks. This allows the Hiring Manager to get all the information ready and ensure you have completed all the necessary checks on the candidate.

All candidates should be required to complete pre-employment checks, you will need to request these before you progress your candidate.

This Check consists of two options

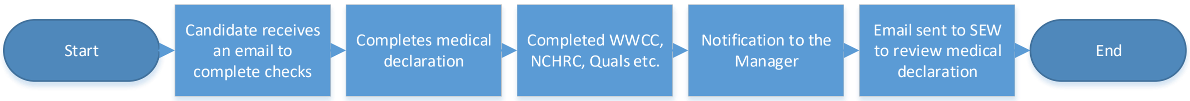
1. Pre-employment checks – This is used for all staff new to the University, or those who have applied for a position that requires a WWCC / Police Check prior to commencement.
2. Medical Pre Hire Process – This is used for all others. Existing staff who are moving into a new area of the organisation are still required to complete this.

Step	Instruction	Screen shot
1	You will need to update your candidate to the Step/status of Pre-Offer – In Progress.	
2	You should then tick the box *"Start Process"* and select the appropriate option.	
3	Click Save and close.	

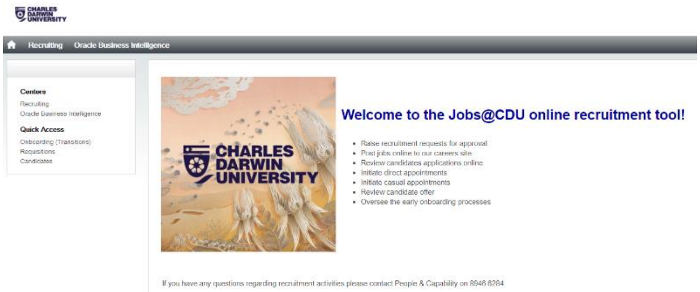
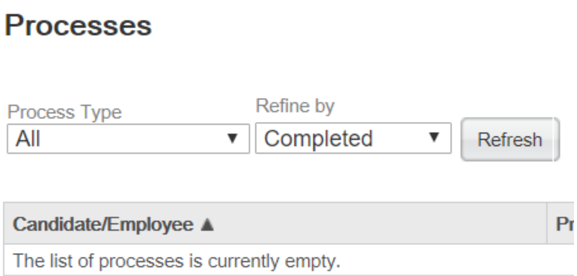
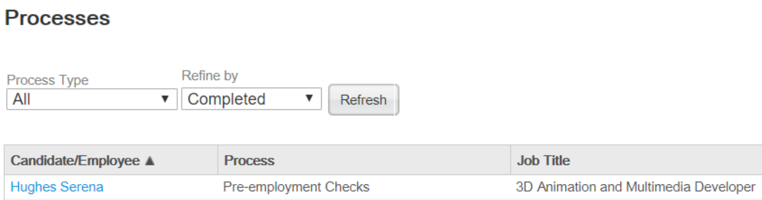
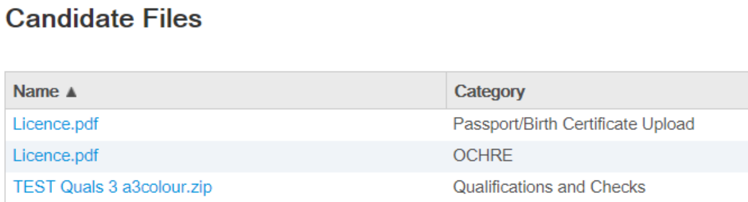
Pre-Employment Checks

If your candidate is required to complete pre-employment checks, you will need to request these before you progress your candidate. Follow the steps below to request this and review the candidates' information.

Pre-Employment Check Workflow

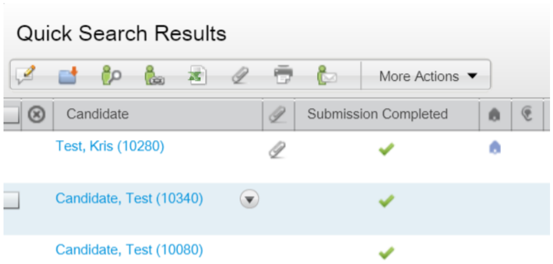


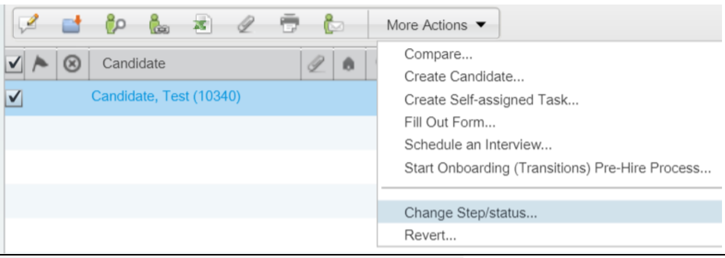
To view the Pre-Employment Information

Step	Instruction	Screen shot
1	You will receive an email to let you know that the pre-employment checks have been completed.	
2	Log into the system and click on onboarding.	
3	Change the filter to Completed and click on Refresh. NOTE: If you want to see the progress throughout the process you are able to do this from the same screen.	
4	Click on the person name, it will appear as a blue link.	
5	Scroll to the bottom of the page to view the Candidate files.	

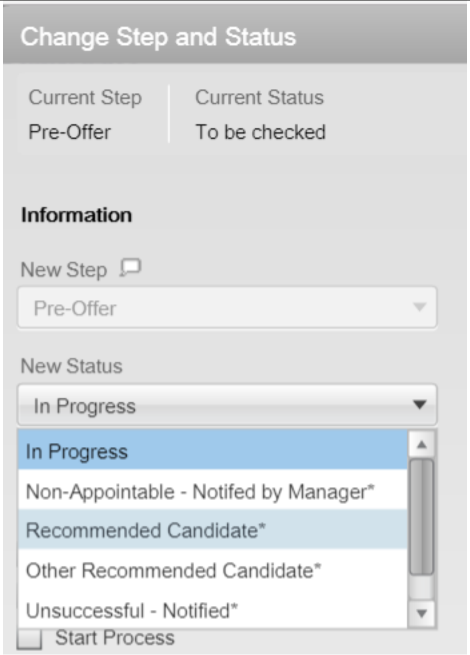
How to Progress a Candidate

<table>
<tr><th>Step</th><th>Instruction</th><th>Screen shot</th></tr>
<tr><td>1</td><td>Select the candidate you wish to progress.

You do this by selecting the check box.</td><td>
</td></tr>
<tr><td>2</td><td>Click more actions and select Change Step/Status

Each step has a start and a progression status.</td><td>
</td></tr>
<tr><td>3</td><td>Select the status you wish to apply to the candidate.

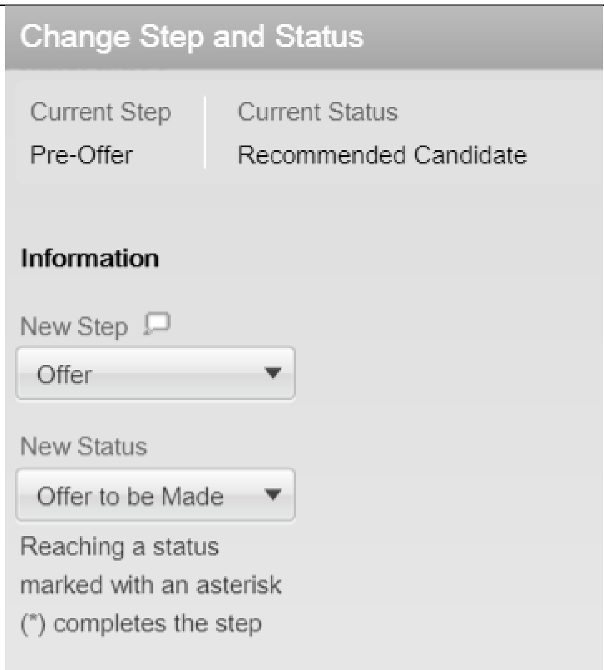
To move them forward, select Recommend Candidate*

NOTE: The other statuses are used if the candidate is not progressing.</td><td>
</td></tr>
</table>

<table>
<tr><td>4</td><td>Once you have selected the Status – Click on Save and Continue.

You will now see where the candidate is moving to. In this example as they were the Recommended Candidate, they have been moved to Offer.

The Offer step is where you will complete their offer details.

Click on Save and Close.</td><td>
</td></tr>
</table>

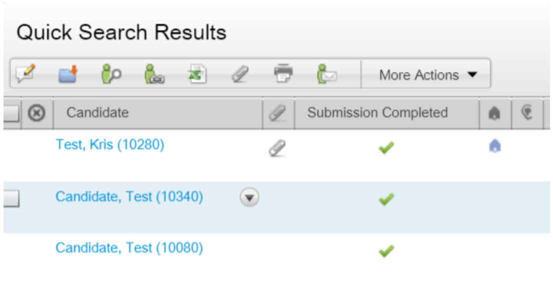
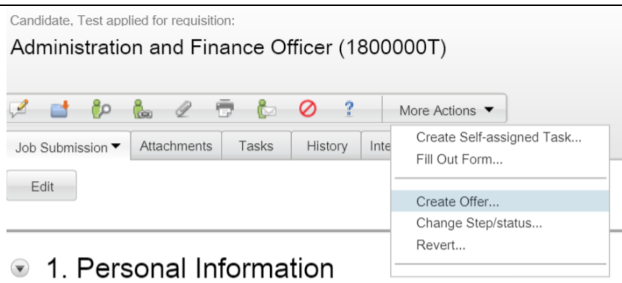
Creating an Offer

Before you complete the offer grid please ensure you have done the following

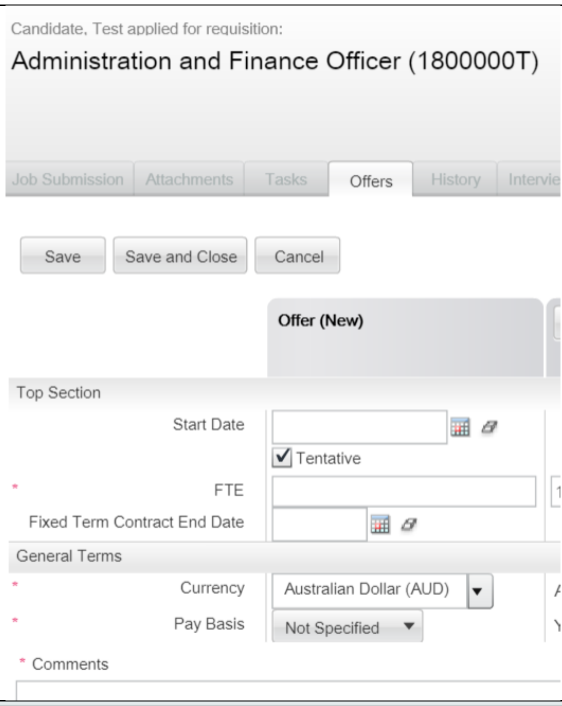
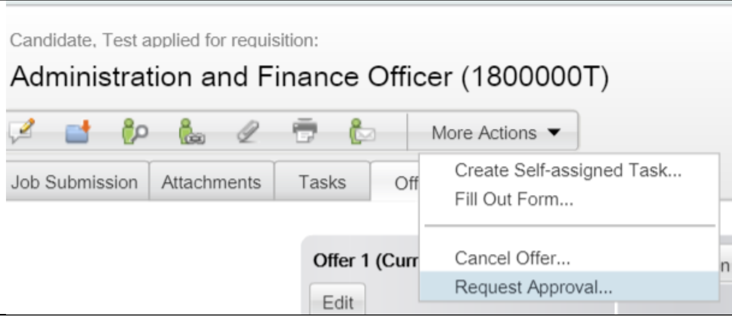
- Attached a copy of the candidate CV/Resume
- Attached a copy of the Position Profile
- Attached evidence of your management account discussion
- Completed the Pre-Employment Checks

<u>Failure to do this will result in delays processing the contract of employment.</u>

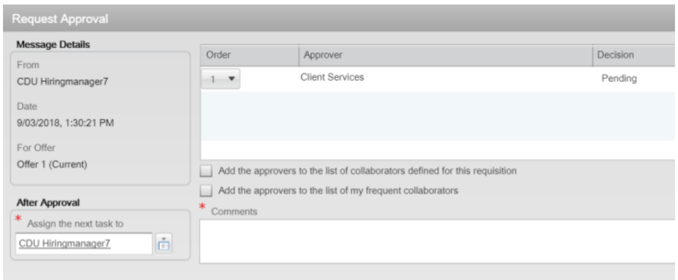
<table>
<tr><th>Step</th><th>Instruction</th><th>Screen shot</th></tr>
<tr><td>1</td><td>Click on the candidates name

NOTE: This is a blue link</td><td>
</td></tr>
<tr><td>2</td><td>Go to More Actions and select Create Offer.</td><td>
</td></tr>
</table>

<table>
<tr>
<td>3</td>
<td>Complete the Offer Grid.

Once completed click Save and Close.</td>
<td>
</td>
</tr>
<tr>
<td>4</td>
<td>Go to More Actions and Request Approval</td>
<td>
</td>
</tr>
<tr>
<td>5</td>
<td>Client Services will appear as the approver.

Enter comments and select done.

Client services will review, make any changes and then you will be notified once it is approved.</td>
<td>
</td>
</tr>
</table>

Client Services will then extend the offer to the candidate. You will be advised via email of the outcome. Client services will also initiate any onboarding activities and you will receive email correspondence once this has been completed.

Onboarding

Issue contract and documents

This section is completed by HR Client Services after advice from Hiring Manager that all other sections have been completed.

Direct Appoints are unable to commence work until after they have received their contract. So please ensure enough time has been allowed for processing before the agreed start date.

Please note that if you have not completed all previous steps correctly this will impact the team's ability to quickly action and issue contracts.

Document History and Version Control			
Last amendment:	26-March-2018	Next Review	31-July-2018
Contact Officer:	HR Client Services – 08 8946 6284		

Version	**Brief Description**
1.00	Creation of original document and uploaded to CDU website