Staff Connect
User Guide
Preferred Candidate

VERSION	DATE	STATUS	CONTRIBUTOR/S
0.1	10/11/2021	Draft	Chris Wang
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0.3	03/01/2022	Review and Update	Chris Wang, Kya Simpson
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0.5	01/02/2022	Review and Update	Chris Wang

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1 Introduction

1.1 PURPOSE

The purpose of this guide is to outline the reference checking process in Staff Connect for the preferred candidate recommended to receive an offer of employment, as the outcome of a recruitment process.

The Preferred Candidate form is raised after the post interview recommendation is completed in Staff Connect.

1.2 GUIDE CONVENTIONS

Bold with Underline indicates a field or phrase used in the form. For example, a section heading, a question or a button.

Italic with Underline and > mark indicates the pathway to find the target.

Red font with Underline is an active hyperlink to a web resource.

2 Background

When a Recruitment form is approved, submission of applications, shortlisting and interview recommendation are completed in Staff Connect.

The Preferred Candidate form is raised after the post interview recommendation is completed in Staff Connect. An email notification is sent to the Hiring Manager when the form is raised and this is when reference checking takes place.

3 Hiring Manager

3.1 CANDIDATE CARE

Prior to reference checks being initiated, it is best practice to check in on the preferred candidate/s. This is a good opportunity to clarify and work through what is happening with the current recruitment and what ACU's requirements will be to progress the candidate's application.

Preferably initiate a phone call rather than an email. Please ensure the candidate understands that it is **NOT** a formal offer.

Prior to initiating a phone call, review the talking points listed in the form's **INSTRUCTION** section.

3.2 SELECT REFERENCE CHECK METHOD

After the phone call, if the candidate is still interested and is happy with the potential start date and salary expectation, select a reference check method in the table under **Process Type**.

Name	Email	Phone	Return Employee	Resume	Available/Start Date	Comments	Process Type
William Test04	hrpp2test04@outlook.com	0000000000	Returning	Resume.docx	31/12/2021		XREF
Jackson Test03	hrpp2test03@outlook.com	0401256987	Returning	Resume.docx	31/12/2021		Manual Reference Check

There are four Process Types.

PROCESS TYPE:	⌄
Done Cancel	XREF
	Manual Reference Check
	Application Withdrawn
	Unsuccesful/Not Suitable
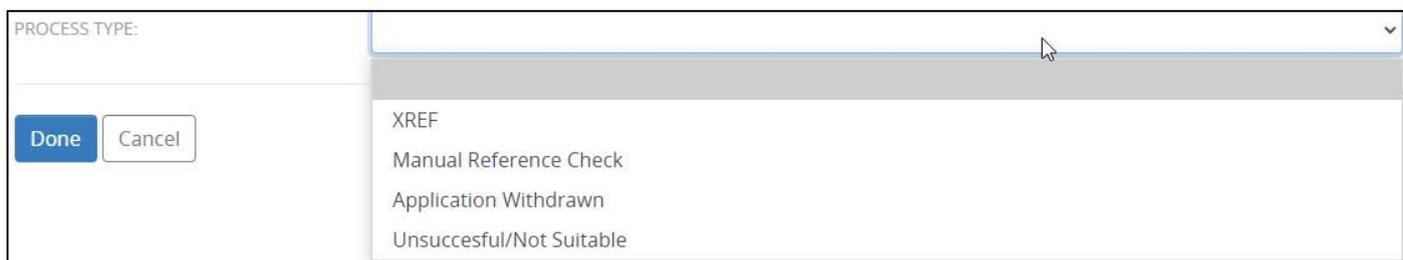
- **XREF** is an automated reference checking process. For further information please read the Service Central FAQ.
- Select **Manual Reference Check** to manually complete a reference check and upload a report in the form.

  Please note that choosing XREF references in the first instance does not preclude you from also completing a manual reference check if you wish to do so (click this link to access the Manual Referee Report document).
- For candidates that no longer wish to continue with the recruitment, select **Application Withdrawn**.
- For candidates that do not fit the vacancy (start date and/or salary expectation), select **Unsuccessful/Not Suitable**.

Click **Next** to progress to the next page.

3.3   REFERENCE CHECK

Each candidate will have an individual section for reference a check. The section heading includes the candidate's name.

3.3.1   XREF

If XREF is selected, the Hiring Manager needs to click the XREF portal link. It will open a web portal for managing XREF reports.

In the XREF management portal, click **REQUEST A NEW REFERENCE CHECK** button to send the XREF link to the candidate.

The next time the Hiring Manager clicks the XREF portal link, the portal will show the below information.

⊙ **XREF Request Sent to Candidate**

The XREF request is awaiting response from the candidate.

Once the reference check is done by the referee, an email notification will be sent to the Hiring Manager. The Hiring Manager will then need to use the XREF portal to download the report.

Referee Details

Name	Email	Status	Viewed	Company Name	Action
Peter Wilks	peter.wilks@acu.edu.au	answered	False	ACU	DOWNLOAD REPORT
Ruan Cloete	ruan.cloete@acu.edu.au	requested	False	ACU	DOWNLOAD REPORT

Selecting XREF does not prevent the Hiring Manager to do a follow-up manual reference check. If required, use the **Referee Reports** table to upload manual reference check reports.

Referee Reports

When you have completed the manual referee checks you can upload the completed report here. Use the **Comments** column to record a short summary of the reference. Click this link to access the Manual Referee Report document.

	Referee's Name	Referee Attachment	Comments
☐			
☐			

+ Add row

3.3.2   Manual Reference Check

If Manual Reference Check is selected, the Hiring Manager can download the reference report template to record the reference check details.

Once completed, use the **+ Add row** button to create new rows for multiple referees. The Hiring Manager can attach a report and leave comments for each referee.

Referee Check Type

RESPONSE: Manual Reference Check ⌄

Referee Reports

When you have completed the manual referee checks you can upload the completed report here. Use the **Comments** column to record a short summary of the reference. Click this link to access the Manual Referee Report document.

☐ Referee's Name	Referee Attachment	Comments
☐		
☐		

+ Add row

3.3.3 Comments

At the end of each candidate section, leave your comments and notes in the text field, then answer the Yes/No questions to record the result. They are mandatory questions.

Comments

RESPONSE:

Question	Yes	No
Are the reference checks satisfactory?	○	○
Is this candidate appointable?	○	○

<u>Are the reference checks satisfactory?</u>

The Hiring manager needs to discuss the reference check reports with the panel members to provide a conclusion.

<u>Is this candidate appointable?</u>

All appointable candidates will be moved to a talent pool by HR at the end of the recruitment process. Answering YES to this question will **NOT** automatically put this candidate into the appointment approval process. This question is used for talent pool building only.

3.3.4 Candidate Rank

If there are multiple successful candidates at this stage, please rank the candidates. Select 1 for the top candidate.

Candidate Rank

Please rank the appointable candidate. Select 1 for the candidate who ranks the first.

RESPONSE: ⌄

3.3.5 Outcome

Select **<u>Commence Approval</u>** to start the Appointment Approval for the candidate.

Select **<u>On Hold</u>** if the candidate is appointable and shortlisted for this position.

Select **<u>Unsuccessful</u>** for the candidate who failed the reference check.

Select **<u>Withdrawn</u>** if the candidate withdraws at this step.

Outcome

Select **Commence Approval** to start the Appointment Approval for the candidate.

Select **On Hold** if the candidate is appointable and shortlisted for this position.

Select **Unsuccessful** for the candidate who failed the reference check.

RESPONSE:	

3.4 CANDIDATE SHORTLIST

Reference check information from each candidate will be summarised into this table when the Hiring Manager clicks the **Save** button. This is a read-only table.

Name	Email	Phone	Commencement Date	Comments	Process Type	Outcome	Rank
William Test04	hrpp2test04@outlook.com	0000000000	31/12/2021		XREF	Commence Approval	1
Jackson Test03	hrpp2test03@outlook.com	0401256987	31/12/2021		Manual Reference Check	On Hold	2

3.5 DUE DILIGENCE

The Hiring Manager needs to communicate the reference check results with the panel members and record comments from the panel members if necessary.

DUE DILIGENCE

Final Shortlisting Due Diligence

Description	Complete	Comment
The results of the references have been fully socialised with the Chair and the panel members.	☐ *	
The Chair and panel members are happy to proceed based on the outcomes recorded above.	☐ *	

Click **Save** and then **Submit** the form to HR.

4 Human Resources

4.1 CANDIDATE SHORTLIST

In the later appointment approval stage, if the offer is either declined by the approver or the candidate, HR can change the Outcome of the candidate and start a new appointment approval process for the candidate that is ranked next. Please confirm with the Hiring Manager before starting a new appointment approval for a different candidate.

	Name	Email	Phone	Commencement Date	Comments	Process Type	Outcome	Rank	Return Employee	Raised?
☐	Peter Cleanskin	▮▮▮▮▮▮	0401 123 456	23/01/2022	Can start on the 23rd January	XREF	Commence Approval	4	New	Approval
☐	Jill Darchy	▮▮▮▮▮▮	0401 123 123	16/01/2022	Can start on the 16th	Manual Reference Check	Commence Approval	4	Returning	Approval

4.2 INITIATE APPOINTMENT APPROVAL

Anyone listed in the **Candidate(s) Shortlist** table above with an outcome of **Commence Approval** and who does not have an entry in the **Raised?** column will have a separate Appointment Approval or Internal Appointment form raised with the Hiring Manager when you tick the **Initiate Appointment Approval** checkbox and click the **Save** button.

DO NOT click the Finalise button. This form stays open with HR until the candidate accepts the offer.

HR APPOINTMENT VERIFICATION

Initiate Appointment Approval

INITIATE APPOINTMENT APPROVAL: ☐

4.3 IF THE APPOINTMENT IS NOT SUCCESSFUL

In the event that a candidate withdraws or the appointment approval form is declined, this form can be reused to progress other candidates that are appointable and on-hold.

HR needs to change the **Outcome** of the candidates in the **Candidate(s) Shortlist** table accordingly, then tick the **Initiate Appointment Approval** checkbox and click the **Save** button again.

The outcomes for HR to select are in the screenshot below.

Commence Approval

Unsuccessful (Approval)
Commence Approval
On Hold
Unsuccessful
Withdrawn
Withdrawn (Pre-Offer)
Withdrawn (At Offer)

4.4 FINALISE THE FORM

This form should not be finalised until after the preferred candidate(s) accepts their offer of employment.

This form may be used by HR to build a talent pool of appointable candidates. If required, HR can come back to this form and collect the information for all the appointable candidates to build a talent pool. Once the talent pool is built, HR can finalise and close this form by checking the **Close Preferred Candidate and Associated Vacancy** checkbox, and then clicking the **Finalise** button.

85.10. Close Preferred Candidate and Associated Vacancy

CAUTION!!!!

Please ensure all recruitment activities for the vacancy has been finalised prior to closing this form. This form will be closed and associated vacancy closed/expried.

CLOSE PREFERRED CANDIDATE AND ASSOCIATED VACANCY: ☐

COMMENTS:

END OF DOCUMENT