Contents

This template is included in the ConnectsUs HR™ Toolkits.

HR Toolkit™
FOR SMALL BUSINESS

HR Toolkit™
FOR HR CONSULTANTS

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A complete HR Toolkit for small business to create and maintain your HR fundamentals.

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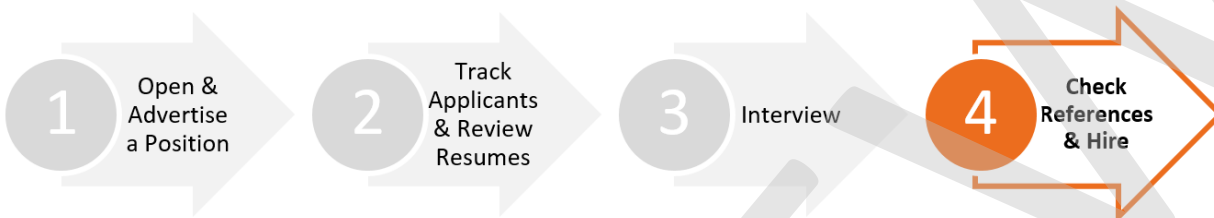
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Assumptions

Checking References & Hiring is Stage 4 of the Recruiting & Hiring Process.

| 1 | Open & Advertise a Position | 2 | Track Applicants & Review Resumes | 3 | Interview | 4 | Check References & Hire |

This guide assumes you've completed Stages 1 to 3. In other words:

- You've short-listed and interviewed candidates for the open position

- You've selected a final candidate

- You've created a *TA-MGR-5520-M. Position Applicant Tracking Spreadsheet* for the position and used it to:

    - Record candidates short-listed for each round of interviews

    - Summarize ratings and feedback on each candidate in each round of interviews

    - Identify which candidate was selected for the position

    - Identify which unselected candidates should be considered for other or future positions

- You're ready to check references and extend an offer.

Supporting Documents

There are a number of templates and guides available to support you through the reference checking and hiring process. The rest of this Guide describes when to use each one, but they're all listed below for quick reference.

Click on an icon in the table below to open that document.

Note: The **Doc ID** column contains a unique identifier for all our HR documents. Think of it like a bar code you don't have to pay attention to, unless you want to double-check you have the right document.

Document #: **CR-ALL-2800-S-1.0**

Document Owner: HR

Last Updated: <insert date>

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Explain the next steps to the successful candidate:

- Testing (if applicable for the position) CUSTOMIZER: Remove this step if not applicable for your Company

- Reference checking

- Introduction to additional key staff members (where appropriate)

- Assuming all goes well, presentation of an offer.

Step 2. Administer Testing (where applicable)

CUSTOMIZER: Remove this section if not applicable for your Company, or modify to fit your practices

Pre-employment testing can be controversial, but we sometimes use it in our Company to minimize the risk of hiring someone who is the wrong fit for our culture, or doesn't have the skills required for the position.

We must be cautious which tests we use—they must be valid, reliable and not conflict with any employment laws. Hiring Managers may request or recommend pre-employment testing, but HR decides whether a test is administered and if so, which one.

Guidelines for testing eligibility:

- CUSTOMIZER: Example: Candidates for Director level roles and above are eligible for CUSTOMIZER: Example: behavior profile testing.

- CUSTOMIZER: Example: Software developers are eligible for CUSTOMIZER: Example: code testing.

CUSTOMIZER: Example: Administrative staff are eligible for CUSTOMIZER: Example: Microsoft® Word® and Excel® testing

❯ MANAGER

1. Consult with HR to find out if the position requires or permits pre-employment testing.

2. If it does, find out which test(s) will be administered and tell the candidate HR will be in touch to set up a time. If there are no pre-employment tests for the position, skip this step and begin the reference checking process.

3. If testing is required, be prepared for the possibility that the candidate may be raise concerns about taking the tests, or even object. Work with HR in advance to be clear on the strategy in the event this occurs.

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b. Browse to the Position folder and open the 7.0 Contractual or Scanned Signed Documents sub-folder.

c. In the **Save as type** field, select **Text Only (*.txt)** from the drop-down menu.

d. In the **File name** field, include the date, candidate name, and "references and consent", for example: *2018_01_19_Mary_Smith_References_and_Consent.*

e. Click **Save**. This ensures that HR has access to the file and can transfer it to the candidate's employee file if hired.
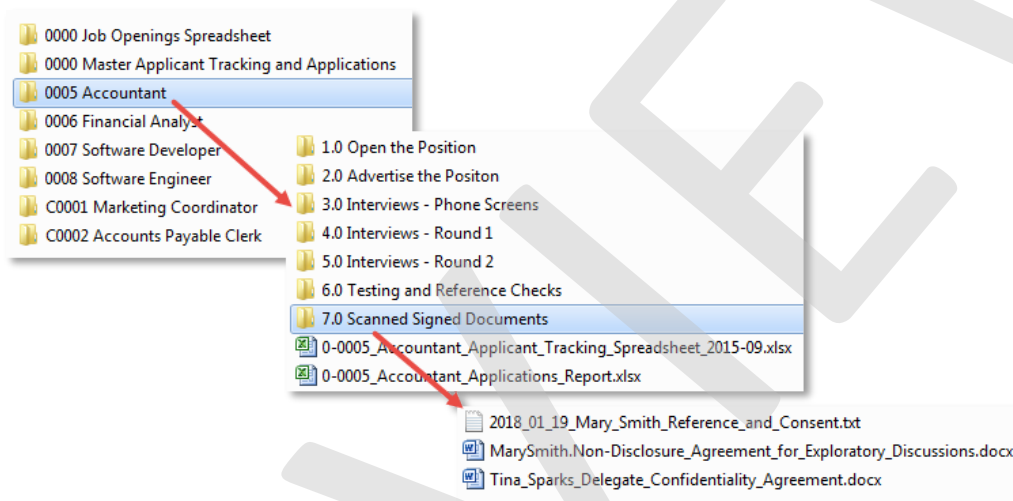
Step 4. Create Reference Check Form

❱ MANAGER   ❱ HR

2. Customize the form as required. If you have questions, refer to the associated *CR-ALL-2820-I. Instructions – Reference Check Form*.

3. Populate the form with interview questions.

*   Refer to the *PC-ALL-2810-M. Reference Check Questions* document to help you get started.

*   Work together to select questions. HR should conduct at least one of the reference checks to assess cultural fit of the candidate with the company. The other reference checks can be done by either the Hiring Manager or HR, as you wish.

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1. Communicate 'No thank you' to any remaining unsuccessful candidates with whom you have not yet communicated. Use the scripts provided in *IV-MGR-2560-R. Internal Candidate Regrets Scripts* and *IV-MGR-2570-R. External Candidate Regrets Scripts* as a starting point for your email, letter or phone call.

   a. Open the *Position Applicant Tracking Spreadsheet* and click on the **Regrets & Potential** worksheet tab**.**

   b. Review the 3 **Unsuccessful Candidates Informed c**olumns. Make sure there's a "yes" entry for every candidate on the list except the one selected for the position.

   > **TIP:** Put your Sales & Marketing Hat on!
   >
   > If you're interested in a candidate, stay in regular contact—just like you would with a prospective customer! Think of recruiting as a sales and marketing function.

   c. Contact any unsuccessful external candidates who have not yet been informed. The recommended method of contact varies depending on how far an individual made it through the screening process.

      ▪ External candidates interviewed by phone can be notified by email.

      ▪ External candidates who participated in Round 1 interviews can be notified by email or phone.

      ▪ External candidates who participated in Round 2 interviews are notified by phone, not email. When you make the phone call, make sure you have enough time to talk to candidate and answer questions.

   d. Internal candidates must be notified in person.

      ▪ Arrange a time to talk to the candidate in private, and give him/her a chance to ask questions.

      ▪ Internal candidates also receive a hand-delivered letter on company letterhead, notifying them of the decision.

      ▪ A copy of the letter is saved in the position sub-folder that represents the highest interview level they reached (e.g., Interviews – Round 1). A copy of the letter is forwarded to HR for the employee's file.

2. Update the **Regrets & Potential** worksheet tab of the *Position Applicant Tracking Spreadsheet* to reflect that all candidates have been contacted.

3. Review the **Future Potential** columns of the worksheet and add or revise notes regarding candidates who should be considered for other or future positions in the Company.

4. Notify HR that the *Position Applicant Tracking Spreadsheet* has been updated and can be used to update the *TA-HR-5510-X. HR Master Applicant Spreadsheet*.

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1. The Hiring Manager and HR meet to discuss the details of the offer.

2. HR prepares the offer letter and any accompanying materials.

3. The Hiring Manager reviews and approves the offer.

4. HR leads the negotiation with the candidate and liaises with the Hiring Manager as needed.

5. Allow the candidate adequate time to review the offer and ask questions. One-to-two days is usually sufficient.

Once an offer has been accepted, open a new employee folder for the candidate and populate it with the relevant documents from the recruiting and hiring process.

❯❯ HR

1. Create a sub-folder for the new hire in **14.0_Employee_Files** folder.

2. Copy the following files from the open **Position** folder to the **Pre-Hire** sub-folder of the new employee's folder:

   - The new hire's original application, or cover letter and resume

   - From the **Open the Position** folder: the *Job Description Form* and the *Probationary Review Form* created when the position was opened.

   - From **Advertise the Position** folder: the final *Job Posting*.

   - From the three **Interviews** folders: all completed questionnaires and notes from the Phone Screen, Round 1 and Round 2 interviews with the finalist.

   - From the **Testing and Reference Checks** folder: completed Reference Check Forms and testing files relating to the new hire.

   - From the **Scanned Signed Documents** folder. Any non-disclosure or written permission documents pertaining to the finalist (for example, consent to contact references).

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- Pricing.

4. Update the following columns of the *HR Master Tracking Applicant Spreadsheet* with the information from the *Position Applicant Tracking Spreadsheet*:

    - Q – Selected for Phone Screen?

    - R – Selected for Round 1 Interview?

    - S – Selected for Round 2 Interview?

    - T – Candidate Hired?

    - U – Candidate Informed re Decision?

    - V – Consider for Future Positions?

    - W – If "yes" for future positions, which department?

    - X – If "yes" for future positions, which position?

    - Y – Hiring Manager Comments

5. Double-check that every candidate that participated in a phone screen or in-person interview was informed of the Hiring Manager's decision to move forward or not. Clarify any questions or concerns with the Hiring Manager.

6. Follow up on any candidate(s) identified as potentially suitable for another open position.

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- S – Posting Close Date: Enter the current date.

- W – Position Filled By: Enter name of successful candidate.

- X – Recruitment Closed Date: Enter date the candidate was hired. This will automatically calculate the number of days it took to fill the position.

- Z – New Hire Start Date: Enter the date the new hire will start.

- AA – Starting Base Salary: Enter the new hire's starting base salary.

- AC to AF – Recruiting Costs: Update the recruiting costs columns to reflect any additional costs incurred since the position was first advertised. If the successful candidate was originally referred by an existing employee, record the amount of the employee referral bonus paid, if applicable.

- AH – Recruiting Source: Enter the name of the website, online location, individual, agency, etc. where the new hire learned of the open position.

3. Change the position folder label from "open" to "closed".

   a. Location the position folder in the master recruiting folder.

   b. Change the position folder name so it starts with "C" (for Closed).

      This way, the folders for open positions are always displayed at the top of the list and folders for closed positions are grouped at the bottom.
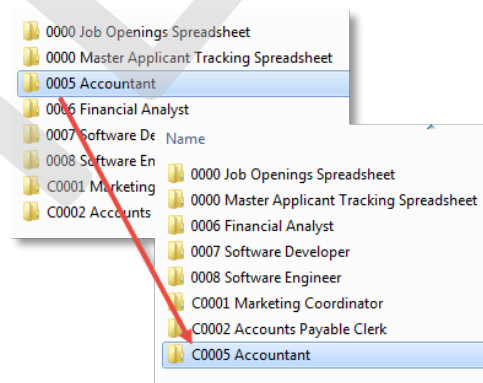
Step 4. Obtain Feedback from Candidates

It's valuable to solicit feedback from interviewed candidates to understand how our recruitment process can be improved, and demonstrate that their experience is important to us.

❱ HR

2. Randomly choose 1-3 applicants that participated in telephone interviews, or Round 1 or Round 2 in-person interviews.

3. Email them individually and ask them to participate in a survey to provide feedback on their experience with us. CUSTOMIZER: Add more about how the survey is done, e.g., via email or an online survey tool.

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