

## Process Guide for Staff - Opening & Advertising a Position

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### Set up your HR Department

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

#### Create your HR materials

- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides
- Download your HR folders
- Identify your HR priorities
- 22 HR topics
- Create HR intranet

#### Support your HR Function

- COVID-19 Portal
- Legislation Portal
- Remote Workforce Portal
- Mental Health Portal
- Diversity & Inclusion Portal
- Weekly updates, email notifications
- Help & support. With real humans!



### Create HR for Clients

HR Toolkit for Small Business, but made for HR consultants with the following differences:

- Special licensing for use with clients
- Additional module + additional download of pre-assembled folders and templates to create your own master HR toolkit to re-use for new clients
- Pricing.

## Assumptions

Recruiting and Hiring is a four-stage process, and Open & Advertise a Position is Stage 1. This guide assumes a Manager has decided they need to hire someone, but has not yet taken any steps to open, post, or advertise a position.

Refer to the [RH-ALL-2400-R. Recruiting and Hiring Overview Guide](#) for an overview of our whole recruiting and hiring process.



## Supporting Documents

There are a number of templates and guides available to support you through the 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.

Doc ID	Document Name	Description	Doc	Help	Ex.
OP-HR-2490-X	Job Openings Spreadsheet	A spreadsheet for HR used to organize and track open positions			
JE-ALL-3530-M	Job Description Form	Form template for creating consistently structured job descriptions			
OP-MGR-2440-M	Position Information Checklist	Checklist for defining status of an open position and ensure hiring alternatives and costs have been explored before it's opened			

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## Step 1. Communicate Need for Position to HR

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### ▶ MANAGER

- ◆ Advise HR of your need to open a position.

## Step 2. Add Position to Job Openings Spreadsheet

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### ▶ HR

Although the position has not yet been approved, a new position folder should be created. This is where all documents related to the position will be saved – approval to hire, job description, job posting, interview forms, signed documents, applications, etc.

1. Create a new Position in the *OP-HR-2490-X. Job Openings Spreadsheet* and assign a unique number to it. If you have not yet used the *Job Openings Spreadsheet*, refer to the accompanying *Instructions* document for information on how to populate each column.

## Step 3. Create Position Folder

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### ▶ HR

1. Create a new folder for the position in the **Recruiting and Hiring** folder. Use the unique position number and position name in the folder name (Example: 0005 Accountant).
2. Copy all empty subfolders from the **0001 New Position Sub-Folder Template** to the position folder (**0005-Accountant** folder). Position folder will look like the diagram below.

**TIP:** Use multi-digit numbers in the folder name, even if the position number is a single digit.

For example, use “0005” instead of “5” so that folders will sort in numeric order when the position numbers get into double and triple-digit ranges.

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- Staff who interact or rely on this position the most
- Staff member currently holding the position, if appropriate
- HR

Provide a deadline date for return with comments. Let them know that if you do not receive a response, buy-in is assumed.

4. Update the draft job description with any recommended changes as required, and save the final version in **Open the Position** folder.
5. To support the current position's status and to ensure that all alternatives have been considered, confirm the position type:
  - a. Save a copy of the *OP-MGR-2440-M. Position Information Checklist* in the **Open the Position** sub-folder and follow the accompanying *Instructions*.
  - b. Complete the *Position Information Checklist* and save the file.

## Step 5. Identify Success Factors for the Position

Success factors are the criteria by which the Hiring Manager will manage the new hire's performance. They are the accomplishments and traits expected to be demonstrated by the candidate by the end of the probationary period.

**TIP:** Clearly understanding and communicating the success factors of a position helps to select interview questions and set expectations for managing performance.

### **MANAGER**

1. Complete a *PP-MGR-3110-M. Probationary Period Review Form* for the position. Follow the instructions outlined in the form's accompanying *Instructions* document.
2. Save all draft and final documents in the **Open the Position** sub-folder.

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## Step 7. Open the Position

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### ► HR

2. Update the Company organizational chart to include the open position.

## Step 8. Internal or External Search?

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### ► HR

The recruiting and hiring process can be time-consuming and costly, and requires HR experience and expertise. While the default is to use internal resources for recruiting, there may be times when it makes sense to engage an external recruiter to help us with our search when:

- ◆ There is limited time, expertise and/or resources available for the recruiting and hiring process
- ◆ We're looking to fill a highly-specialized role for which there are likely to be few candidates
- ◆ We have limited access to eligible candidates
- ◆ We have a requirement for a short-term or temporary position
- ◆ The search may span outside our immediate jurisdiction:
  - national; or
  - international - immigration and tax expertise may be required; and/or
  - the position will likely require relocation

1. Determine if the position requires consideration for engaging an external resource for conducting the search.
2. Review the *OP-HR-2480-R. Head Hunter & Recruiting Agency Guide*.
3. Make a recommendation to the Hiring Manager and jointly decide on the best option based on the recruiting budget and position requirements.

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4. Modify the job posting as required and save the final version in the **Advertise Position** folder.

## **Step 2. Decide Where to Post the Position**

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### **► HR ► MANAGER**

- ◆ Work together to determine the best online and traditional venues to post the position.

## **Step 3. Post, Email, and Advertise the Position**

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### **► HR**

1. Post the final job posting on the **Careers** page of the Company website. Ensure that all external ad placements direct applicants to this page.
2. Make sure the **Careers** page clearly instructs applicants how to submit an application to the Company:
  - All applications must be submitted by email.
  - Cover letter, resume, references and all other information that the applicant wants us to read must be provided in one attachment – an MS Word or PDF document.
  - If responding to a specific posting, the competition number must be included in the email subject line.
  - If sending an unsolicited application, the subject line must include the name of the department or functional area they are interested in.
3. Send an email to all staff notifying them that the new position details are available on the **Careers** page:
  - Include a link to the job posting.
  - Encourage staff members to apply, or to refer suitable candidates to our **Careers** page.
  - Explain that internal applicants must go through the same application process as external applicants.
4. Post the position on appropriate external job sites:
  - Ensure that all postings direct applicants to the **Careers** page of the Company website.

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