



Requisition Planning Tool Guide

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Yale

This document supports the Recruiting Strategic Initiative and the Recruiting Needs Review MVP and serves as a guide in assessing recruiting needs, decisions, and assigning open positions.

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This guide supports the Recruiting Strategic Initiative, which aims to build an intuitive and efficient institutional process for staffing roles across Yale with highly talented and diverse candidates. Re-engineer the recruiting methods and practices of Yale to contribute to the culture and capability of Yale in an effective university-wide approach.

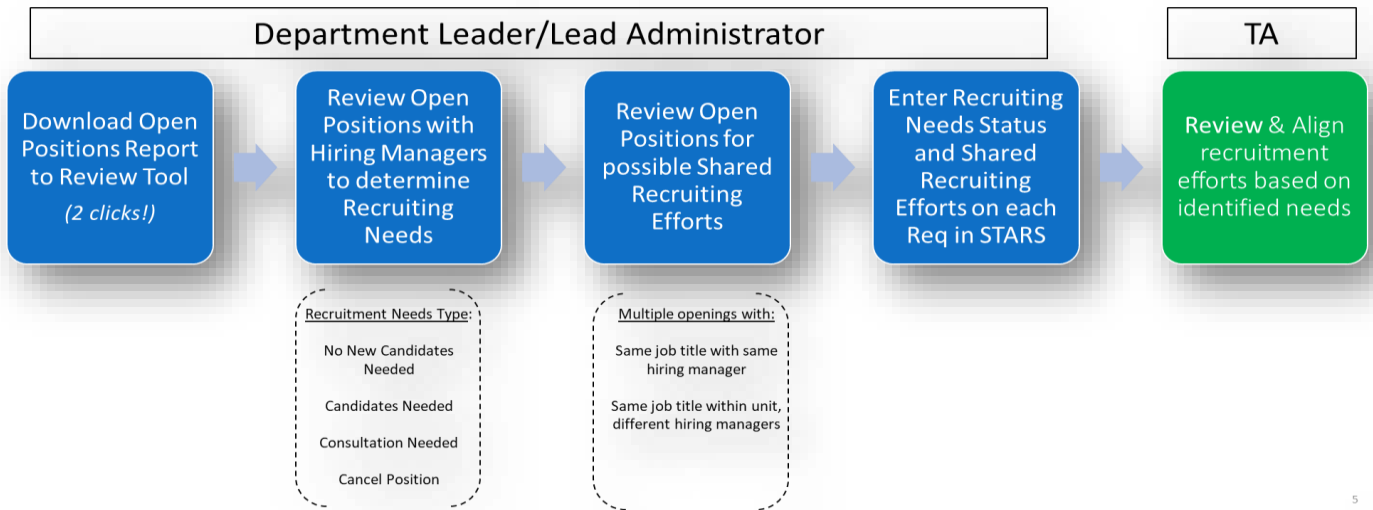
As part of the overall Recruiting strategy, we have identified a related MVP, Recruiting Needs Review, which aims to give the Talent Acquisition team the tools to prioritize and focus their time across their various open positions more effectively and efficiently.

The goal is to:

- Define a process for departments to identify high-priority recruiting needs that is informed enough/flexible enough to respond to the needs of the individual units.
- Improve time to fill by creating a focused approach in filling high-priority roles for hiring managers and recruiters, encouraging more frequent collaboration and attention.
- Reduce the number of open positions by grouping like positions to help build candidate pipeline and recruiter focus.
- Aligns with the goals of the Recruiting Strategic Initiative.

Please contact the HR Business Partner if you have questions or run into issues while using this document.

Below is the workflow process for updating and using the Requisition Tool to conduct the recruitment needs review for open and approved positions in your department.



The Requisition Planning Tool

The Requisition Planning Tool is designed to assist Department Leaders and Lead Administrators in assessing recruiting needs, decisions, and assigning open positions. The Tool displays data for all approved and opened staff positions. It includes worker type, job category, family profile, replacement/new, compensation grade, and posting date. This data does NOT include temp or casual data.

Download your Requisition Data

1. [Click here](#) to run the Requisition Data Report.
2. In the report, hover over the light purple ribbon labeled Requisition Details.
3. Three icons will appear on the top right. Select the icon with three dots and then select Export Data. Refer to the image below, for example.



4. The data will begin to download to your computer. It is already filtered to show only the positions that list you as the lead administrator.

Please note the following:

- Access to this report is limited based on roles and only accessible to Lead Administrators.
- The report includes all Staff positions, including Service & Maintenance, Clerical & Technical, and Managerial & Professional positions.
- The report includes positions that are currently Approved or Open in STARS.

Update the Requisition Planning Tool

1. Open the excel file that was downloaded to your computer.
2. Select the results (excluding column headers).
3. Copy results and paste them into the Requisition Planning Tool beginning in cell A16.
4. The columns labeled Recruiting Status and Duplicate Position will be blank for the majority of your requisitions, noting that they have not been entered in STARS. The Recruitment Status may already show that **no new candidates are needed** if a candidate has accepted an offer.

Requisition Planning Tool												
T o t a l s	Recruiting Needs?		Count									
	No new candidates needed		#	%								
	Candidates needed		1	20%								
	Consultation needed		2	40%								
	Cancel Position		1	20%								
	Total		1	20%								
	Possible Shared Recruiting?		5	100%								
WD Positi	WD Requisi	STARS Requi	Req Status	Recruitment Status	Duplicate Position	Created Date	Approved Da	Open Date	University Jo	Worker St	Job Categ	
P314233	98562WD	75546BR	Open	No new candidates needed	No	08/02/2022	08/08/2022	08/09/2022	Museum Tecl	Staff	Tednicia	
P313995	98373WD	75390BR	Open	Candidates needed	No	07/26/2022	08/02/2022	08/02/2022	Editorial Assi	Staff	Administi	
P313997	98366WD	75389BR	Open	Candidates needed	Yes	07/26/2022	08/02/2022	08/10/2022	Project Speci	Staff	Professio	
P313744	97993WD	75221BR	Open	Cancel Position	No	07/19/2022	07/25/2022	07/26/2022	Museum Ass	Staff	Tednicia	
P313107	97766WD	75066BR	Open	Consultation needed	No	07/12/2022	07/14/2022	07/15/2022	Assistant Edit	Staff	Professio	

Assess Recruitment Needs with Hiring Managers

Use the Requisition Planning Tool to guide conversations with managers to help get an updated status on the recruitment process back to the Talent Acquisition team. Below we have provided definitions for each status.

Please note: You do not need to provide the recruiter with an update if the requisition is an L35 Service & Maintenance position unless the Position has been posted externally.

The following definitions will help you with status descriptions and factors to consider for requisition disposition. Refer to the [Recruitment Status Considerations](#) to help you and the hiring manager as you determine the status of each requisition.

No New Candidates Needed

Top candidates identified/interviewing top candidates close to an offer. Please note that your recruiters will update the recruitment status to No New Candidates Needed once an offer has been accepted.

- **Action** - The recruiter will update the Position to show that it is closed to further applicants. No new candidates will be forwarded for review.

Candidates Needed

Department ready for next batch of candidates to consider.

- **Action** - Recruiter and sourcer will continue the review of available candidates based on current criteria and forward qualified candidates.

Consultation Needed

Cannot find the right candidate match for the role and need to re-visit the job posting language and/or think more organizationally on the need.

- **Action** - The recruiter will schedule a meeting with the hiring manager for consultation.

Cancel Position

Position no longer needed.

- **Action** - The recruiter will cancel the Position. No new candidates will be able to apply. The department is responsible for re-initiating the requisition in the future if needed.

DUPLICATE POSITION

Possible Shared Recruitment

Select Yes if the job posting has the same job title with the same hiring manager and/or the same job title within the unit with a different hiring manager.

- **Action** - The recruiter will schedule a meeting with the hiring manager for a consultation to explore opportunities for shared recruitment.

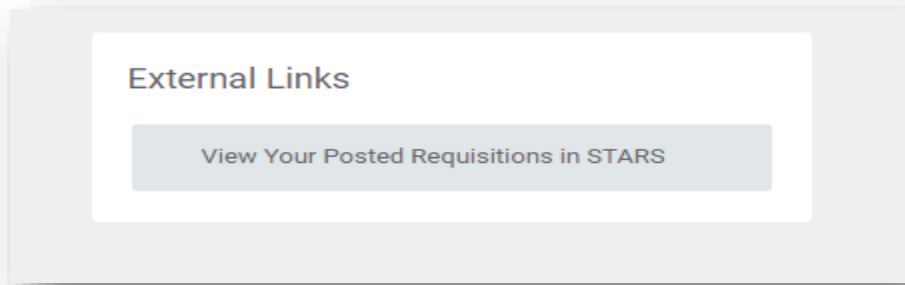
Recruitment Status Considerations

Status	Considerations for Department	Examples
No New Candidates Needed	<p>Are you no longer reviewing the candidates that the recruiter forwards?</p> <p>Are you close to identifying a final candidate?</p>	<p>You are in the process of scheduling final interviews.</p> <p>You are finalizing reference checks before submitting your request to extend an offer.</p>
Candidates Needed	<p>Are you still interested in seeing more candidates?</p>	<p>You have not received candidates to review yet.</p> <p>You have reviewed some candidates but would still like to build the candidate pool.</p>
Consultation Needed	<p>Is there a lack of qualified candidates?</p> <p>Do you need to connect with a recruiter to fine-tune the type of candidate of interest?</p>	<p>The caliber/experience of the candidates forwarded for review is not in line with your needs.</p> <p>The skills/abilities in the posting are narrowing the candidate pool unnecessarily.</p>
Cancel Position	<p>Do you no longer have a need for this Position?</p> <p>Have you decided to post a different position that will make this Position obsolete?</p> <p>Are you unable to devote the necessary time to the recruitment process at this time (i.e., managing other priorities in the department)?</p>	<p>A replacement accountant position was posted for six months. The remaining accountants have successfully absorbed the work with minimal impact. Consider canceling the Position.</p> <p>One year fixed duration Research Associate position associated with a research project has been posted for six months. The Position will now be unable to accomplish project targets by the due date and/or grant funding end date. Consider canceling the Position.</p>
Possible Shared Recruiting	<p>Is the hiring manager for the duplicate positions the same manager?</p> <p>Is there an opportunity for multiple hiring managers to work together on the recruitment process?</p>	<p>Multiple Accountant positions are open within a department or IBO with different supervisory organizations. If the positions are the same, consider utilizing one req to source the others. One hiring manager would act as the primary contact with staffing.</p>

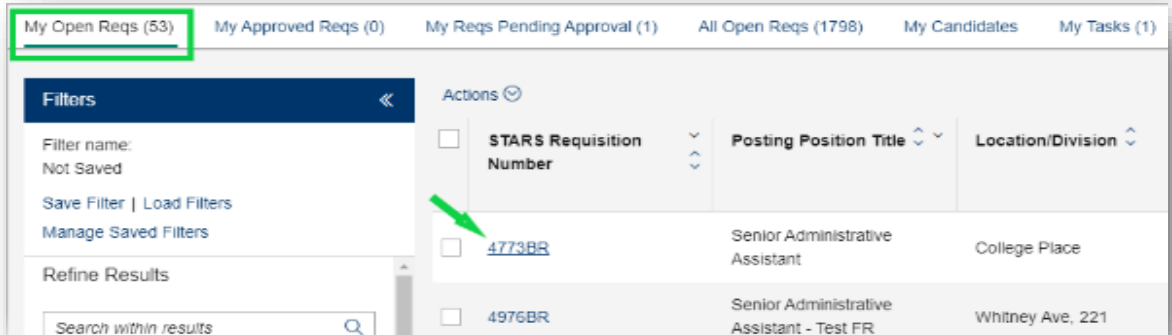
Update the Requisition Status in STARS

Once you have met with hiring managers about the status of each requisition, the recruitment status can be entered directly into STARS. This status will guide the Talent Acquisition team's next steps.

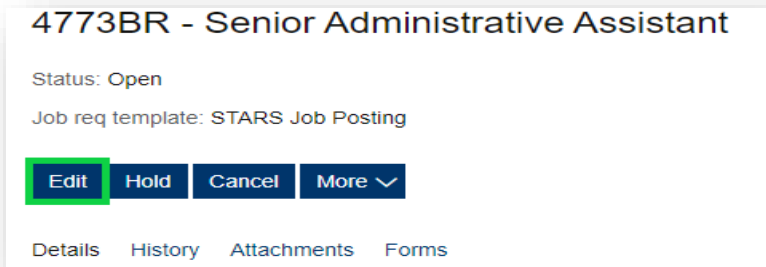
1. Login to [STARS](#). You can access STARS from Workday by clicking the Hiring app > View Your Posted Requisitions in STARS



2. From your home screen, select "My Open Reqs" and click the req you would like to edit



3. Click Edit



4. Scroll down to the Recruitment Status section
5. Update the **Recruitment Status** and **Is this a duplicate position?** Fields with the information gathered in meetings with the Hiring Managers

Recruitment Status (click icons below for more information) ^

Recruitment status ⓘ [dropdown]

Is this a duplicate position? ⓘ [dropdown]

6. Click "Save"
7. Continuously update the Recruiting Needs status for each open requisition as progress is made towards the selection of a candidate to hire
8. The next time you download the data from Requisition Data Report, you will see the statuses and the counts of each status. You can update the tool biweekly to establish a cadence of meetings with the recruiter. Please ensure that the hiring manager (you or your delegate) updates the STARS status on each requisition as needs change.

Where Do We Go From Here?

The statuses entered into STARS will guide how the Talent Acquisition team moves forward. They will be able to pull the statuses into their STARS Dashboard and use that information to prioritize their efforts.

<input type="checkbox"/>	STARS Requisition Number	Posting Position Title	Posting Options	New	Total	Please select the status (click the icon for more information)	Is this a duplicate position?
<input type="checkbox"/>	4973BR	Referral Specialist	✚	0	1	Consultation Needed	No
<input type="checkbox"/>	4976BR	Senior Administrative Assistant - Test FR	✚	1	2	Candidates Needed	No
<input type="checkbox"/>	4452BR	YSS Financial Analyst	✚	0	0	Candidates Needed	No
<input type="checkbox"/>	4975BR	Human Resources Representative	✚	0	1	Cancel Position	Yes

The following questions are best practices. When applicable, these will make for a more efficient and successful recruitment effort. [Check out the Hiring Guide | It's Your Yale.](#)

Job Description/Position Focus Review:

- Does the job posting title and position focus align?
 - Consult your department leadership and HR to see if a title change would be appropriate.
- Does the job posting title and skills/abilities align?
 - If not, modify either the title or the skills/abilities.
- Are any of your required skills/abilities niche or unusual for this Position?
 - Consider making this a preferred qualification vs. a requirement.
- Is your Position one of many identical positions in the department or IBO?
 - Consider having shared recruitment and having one job posting source for multiple.

Interview Ready:

- Can you block time for future interviews?
 - Consider having first-round interviews done via zoom. Limit the number of campus visits.
- Are your interviewers identified?
 - Limit the number of interviewers.
 - Three max to interview candidates. If not, modify either the title or the skills/abilities.
- Do you have interview questions ready?
- Do all interviewers have unique sets of questions to add value?
 - Review resources available to have meaningful interviews.
- Will you hold interviews until a new supervisor is hired?
 - Hold posting the Position until then.
 - Consider having shared recruitment and having one job posting source for multiple.

Selecting Candidate:

- Review resources available to have meaningful reference checks.

GETTING HELP

Please consult your HR partner for assistance or additional training if you have questions regarding these processes.

USEFUL LINKS

STARS Hiring Manager Portal

The Portal is where you can log in to STARS to see all your qualified candidates. The e-links I share will expire after a few weeks. You can also access from Workday by clicking the Hiring app > View Your Posted Requisitions in STARS

<https://business.yale.edu/stars/starsEnterpriseLogin.jsp>

Hiring Guide

This site gives you a high-level overview of the recruitment process.

<https://your.yale.edu/work-yale/manager-toolkit/recruiting-and-hiring/hiring-guide>

Manager Toolkit

This site provides resources to support you as a manager beyond the recruitment process.

<https://your.yale.edu/work-yale/manager-toolkit>