Screen and Move Candidate(s)
The objective of this guide is to Screen and Move Candidate(s).

Security Role
- Recruiter

Contents

Move Candidates through Recruiting Stages
1. Applications will be received in the **Screen/Agency Review** stage.
2. Select a Candidate. There are multiple ways to find your Candidates.
   a. Click the Candidate tab from the Recruiting Hub.
   b. Or, from your Inbox.
   c. Or, if you know the requisition you are working with, go to Job Requisitions, find, and click on that specific Req. From there, scroll down the page to find the Candidates.
3. Select the **Candidate(s)** to act upon.
4. Click on the Candidate name to begin screening.
   i. You will first review applications for minimum qualifications. Applications must reflect the minimum qualifications in order to move forward in the selection process.

(1) If the application does not reflect the required qualification, it must be declined in this stage as "Does not met minimum qualifications". Applicants will receive an automatic notification that they did not meet the qualifications the day following the declination.

ii. If you have an agreement with State Personnel Talent Acquisition to complete the minimum qualification review, the applications received in this stage will be minimally qualified and should be considered accordingly.

5. From the **Candidate Home Screen,** you can view information about the applicant (see the blue section on the left of the screen).
6. After screening, take Actions using the orange button at the bottom of the page. You can:
   a. Move Forward – Select from options (you must complete at least one of the steps v - vii to move on to the Offer stage):
      i. MQ Review Complete
      ii. Recruiter Phone Screen
      iii. Manager Application Review
      iv. Manager Phone Screen
      v. Interview
      vi. Reference Check
      vii. Assessment
   b. Decline
      NOTE: Workday will send automatic non-selection notices for options ii through vi below.
      i. Screen - Candidate Withdrew
      ii. Screen – Does not meet minimum qualifications
      iii. Screen - Not selected for hire.
      iv. Screen - Not selected for interview.
      v. Screen - Requisition Canceled
      vi. Screen - Unable to contact Candidate.
8. Click **OK**.

MQ Review Complete

Candidates moved to the step remain in the screen stage, with the label MQ Review Complete. You can use this step as a signal that the candidate passed the minimum qualification review. From this step, you will either move the candidate forward or decline the application.

7. Move Forward – Select from options:
   - Recruiter Phone Screen
   - Manager Application Review
   - Manager Phone Screen
   - Interview
   - Reference Check
   - Assessment
8. Decline
   NOTE: Workday will send automatic non-selection notices for options b through f below.
   - Screen - Candidate Withdrew
   - Screen – Does not meet minimum qualifications.
   - Screen - Not selected for hire.
   - Screen - Not selected for interview.
   - Screen - Requisition Canceled
   - Screen - Unable to contact Candidate.
9. Click **OK**.

Recruiter Phone Screen

Candidates moved to the step remain in the screen stage, with the label Recruiter Phone Screen. Note, a self-schedule calendar can be added to this stage to allow candidates self-select a time for a phone screen. See Setting Up Self-Schedule Calendars Guide for more information. From this step, you will either move the candidate forward or decline the application.

10. Move Forward – Select from options:
    - Interview
    - Recruiter Phone Screen
    - Manager Application Review
    - Manager Phone Screen
    - Reference Check
    - Assessment
11. Decline
    NOTE: Workday will send automatic non-selection notices for options b through f below.
    - Screen - Candidate Withdrew
    - Screen – Does not meet minimum qualifications.
    - Screen - Not selected for hire.
    - Screen - Not selected for interview.
    - Screen - Requisition Canceled
    - Screen - Unable to contact Candidate.
12. Click **OK**.

Manager Application Review

Applications moved to the Manager Application Review step will be assigned to the Hiring Manager for action (*the hiring manager can move applications forward or decline applications if you utilize this step*). See Hiring Manager Recruiting Guide for more information.

NOTE: Hiring Managers cannot see attachments when applications are shared via the Manager Application Review only. If you wish for them to view the attachments (such as resumes), you will need to use the Share Application function. Once you share the application through this method, the resume will be accessible through the Manager Application Review as well. See Print & Share Applications Guide for more information.

Manager Phone Screen

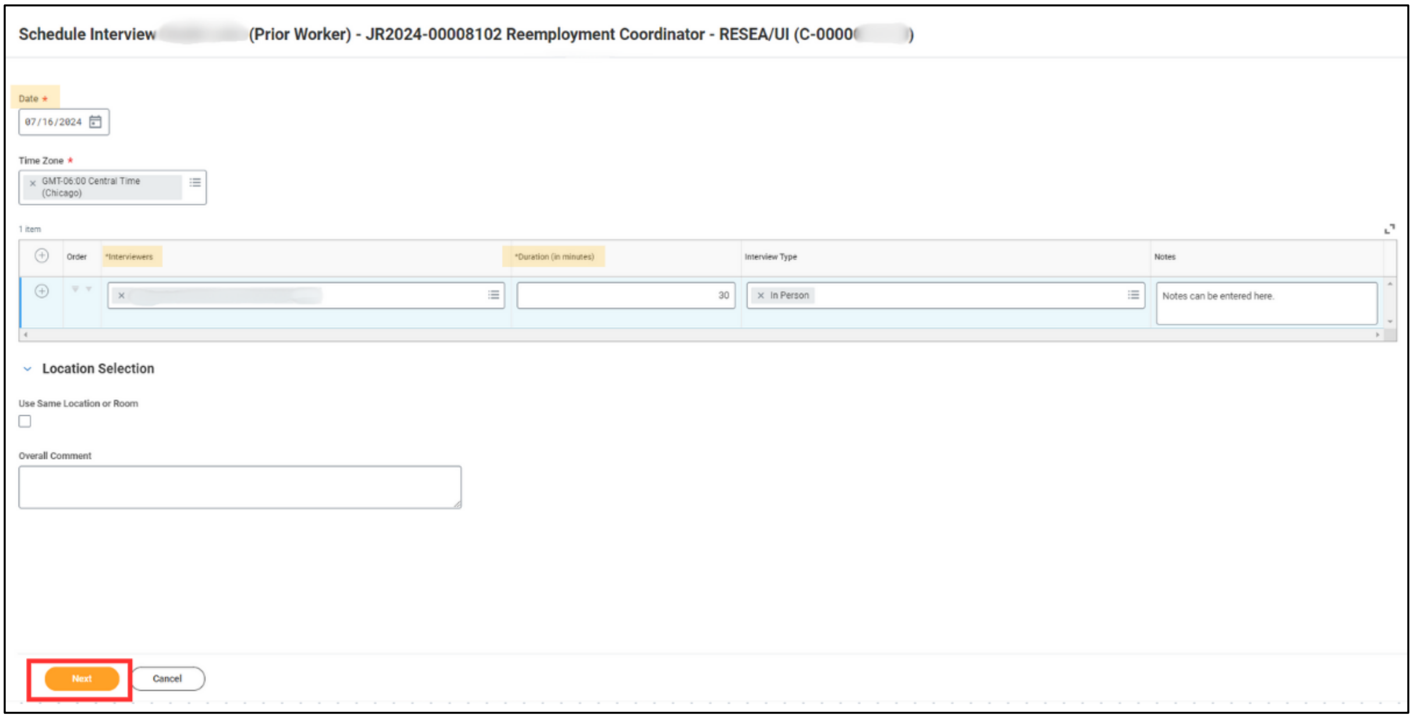
Applications moved to the Manager Phone Screen step will be assigned to the Hiring Manager for action (*the hiring manager can move applications forward or decline applications if you utilize this step*). See Hiring Manager Recruiting Guide for more information.

Interview

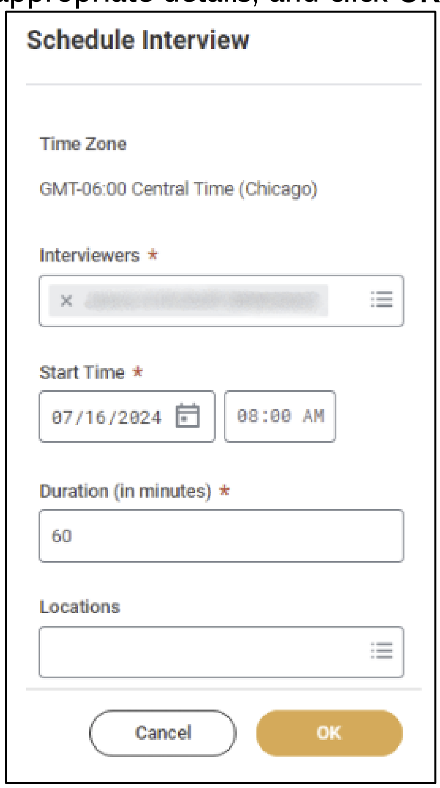
The interview stage can be used to deliver self-scheduled interview tasks or track interview schedules. For Self-Schedule Steps, see Setting Up Self-Schedule Calendars Guide. The below instructions are for tracking interview schedules.

13. Moving a candidate to the Interview stage will populate a task to schedule the interview.
    - Click Schedule or Skip on the task.
        i. Schedule allows you to record information about when the interview is scheduled.

14. Complete the appropriate details and click next.
    - You must enter the date, interviews, and duration. You will enter the time of the interview on the next screen.



15. Click **Schedule**, complete the appropriate details, and click **OK**.



16. Click **Next** at bottom of screen.
17. Complete the applicable details if you wish to send an email to the interviewers.
    NOTE: it is recommended that you add text in the Body section to give details about the interview schedule as very limited information is pre-populated. If you do not wish to send an email, click the box next to Do not send email.
18. Click **Submit**.

Manager Feedback

Once an interview is scheduled, the hiring manager will receive a task to provide feedback, if desired. They will receive a task that allows them to enter a rating and comments. See Hiring Manager Recruiting Guide for more information.

Recruiter Feedback Acknowledgement

19. Once the hiring manager submits feedback, the recruiter will receive a task to acknowledge the feedback.
    - Review and click **Submit**.

Interview Decision

The interview decision task will appear once the interview steps are complete, where the next step for the candidate is indicated. You will either move the candidate forward or decline the application.

If you do not receive an interview decision (either because the interview wasn't scheduled, or the manager didn't provide feedback), you can access the move forward tasks by opening the candidate profile and clicking Actions in the blue menu. Then click Job Application, select the appropriate requisition, click OK, and then you will be presented with the Move Forward/Decline options.

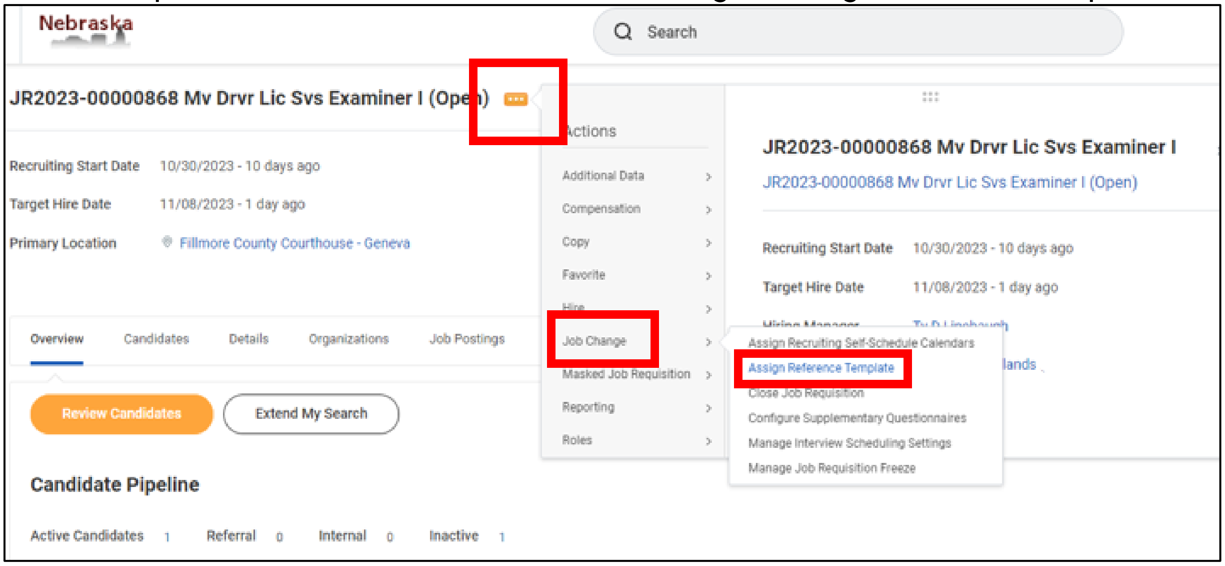
20. Move Forward – Select from options:
    a. Additional Interview.
    b. Assessment.
    c. Reference Check.
    d. Background Check.
    e. Offer.
21. Decline
    NOTE: Workday will send automatic non-selection notices for options b through e below.
    a. Interview - Candidate Withdrew.
    b. Interview – No show for interview.
    c. Interview - Not selected for hire.
    d. Interview - Requisition Canceled.
    e. Interview - Unable to contact Candidate.

Reference Check

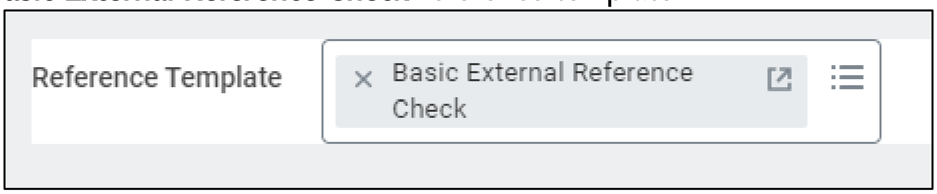
The Reference Check stage is used to collect reference information, or track references needed.

22. If you wish to collect reference information through the system, the Reference Check Template must be added prior to any candidates being moved to this stage.

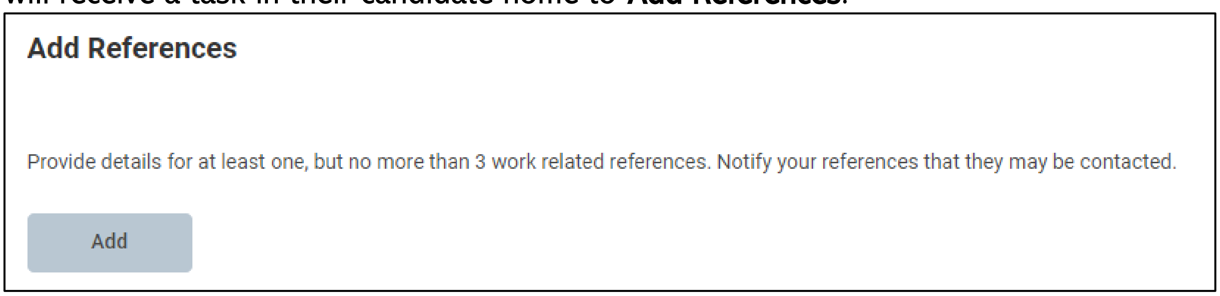
23. From the requisition, click related actions > Job Change > Assign Reference Template.



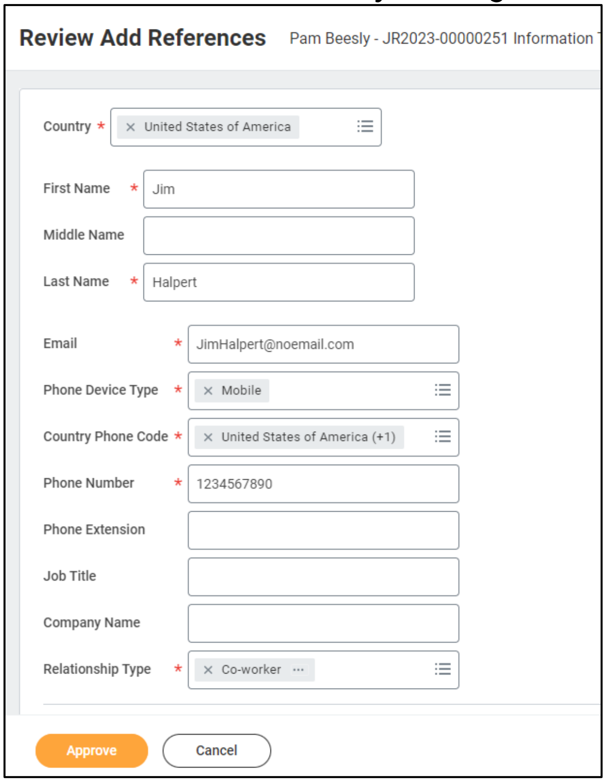
24. Select the **Basic External Reference Check** reference template.



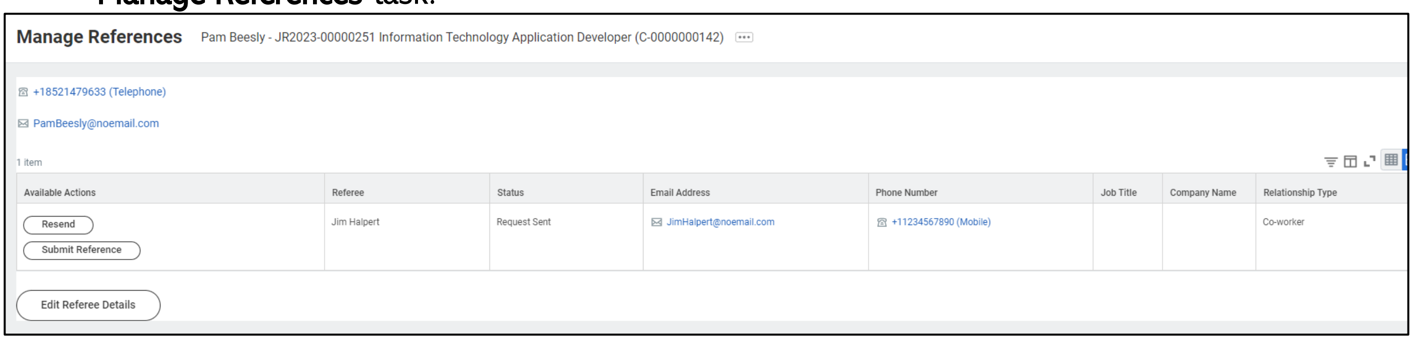
25. Click OK.
26. When the reference template is attached and a candidate is moved to this stage, the candidate will receive a task in their candidate home to **Add References**.



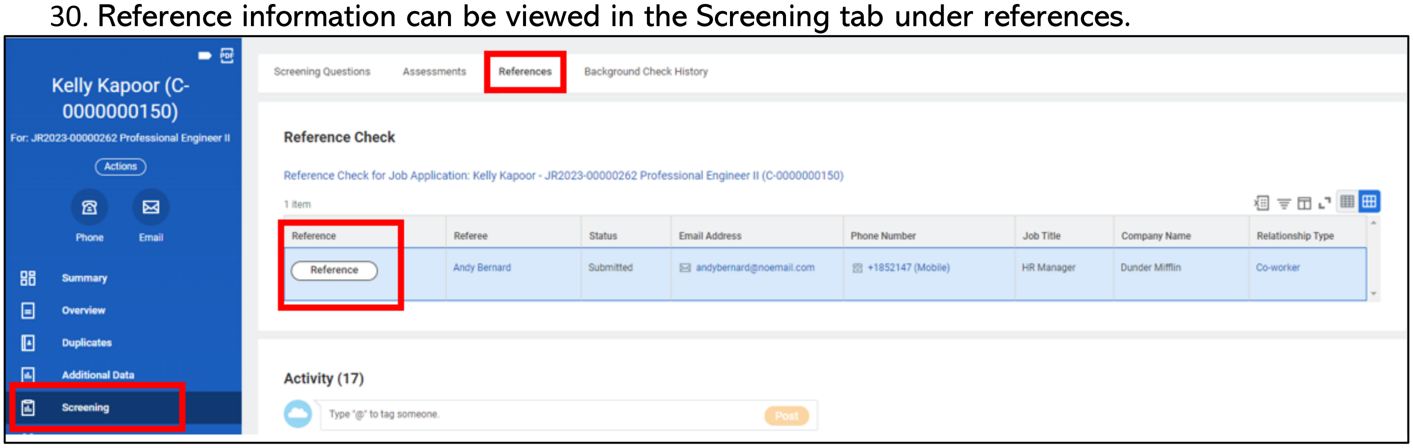
27. Once the candidate enters reference information, you will get a task to **Review Add References**.



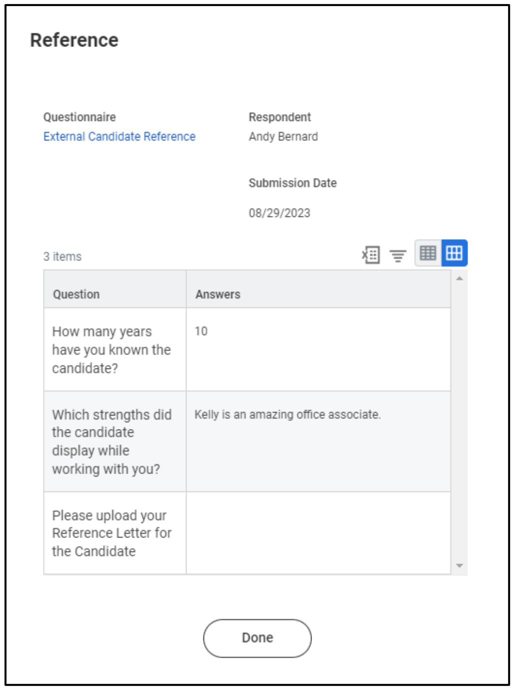
28. If acceptable, click **Approve**.
29. The reference will get a notification from Workday to complete the reference request. You have options if you need to resend, or enter the information on behalf of the reference in the **Manage References** task.



30. Reference information can be viewed in the Screening tab under references.



31. Click **Reference** to review the information.



32. If an Internal candidate or Prior Worker candidate is moved to the Reference Check stage, a **To Do for HR Reference Check for Current or Prior Employee** will populate for the primary recruiter.
33. Complete the appropriate tasks as applicable, per agency policy, outside of Workday.
34. Click **Submit** on the To Do.
35. Click **Review Reference Check Decision**. You will either move the candidate forward or decline the application.

    If you do not receive a decision task, you can access the move forward tasks by opening the candidate profile and clicking Actions in the blue menu. Then click Job Application, select the appropriate requisition, click OK, and then you will be presented with the Move Forward/Decline options.

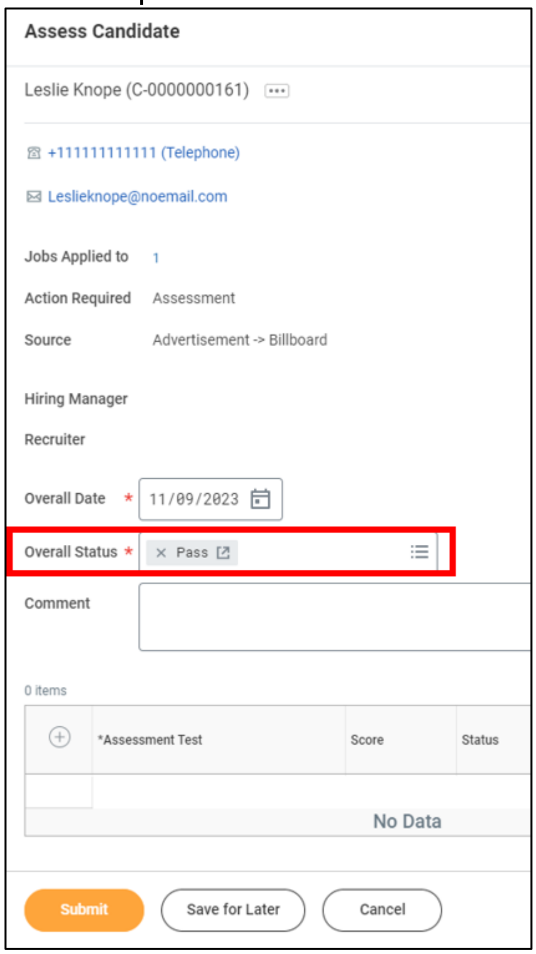
    a. Move Forward – Select from options:
        i. Interview.
        ii. Assessment.
        iii. Background Check.
        iv. Offer.
    b. Decline

        NOTE: Workday will send automatic non-selection notices for options ii through v below.
        i. Reference Check - Candidate Withdrew.
        ii. Reference Check – Negative references received.
        iii. Reference Check - Not selected for hire.
        iv. Reference Check - Requisition Canceled.
        v. Reference Check - Unable to contact Candidate.

Assessment

Candidates that are moved to the Assesment Stage will produce a task for the recruiter to assess the candidate. Note, there are no integrated assessments; this is for tracking purposes only. The assessment stage can be helpful to use a holding space, or tracking other tasks/stages not built into the system.

36. Open Assess Candidate task and update the Overall Status.



37. Click **Submit**.

    Click **Make Assessment Decision**. You will either move the candidate forward or decline the application.

    If you do not receive a decision task, you can access the move forward tasks by opening the candidate profile and clicking Actions in the blue menu. Then click Job Application, select the appropriate requisition, click OK, and then you will be presented with the Move Forward/Decline options.

    a. Move Forward – Select from options:
    - i. Interview.
    - ii. Reference Check.
    - iii. Background Check.
    - iv. Offer.

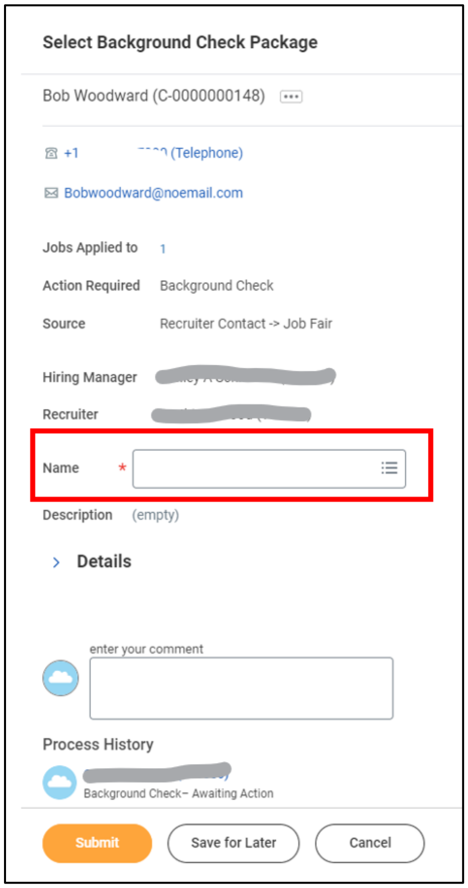
    a. Decline

    NOTE: Workday will send automatic non-selection notices for options ii through v below.
    - i. Assessment - Candidate Withdrew.
    - ii. Assessment - Failed Assessment.
    - iii. Assessment - Not selected for hire.
    - iv. Assessment - Requisition Canceled.
    - v. Assessment - Unable to contact Candidate.

Background Check

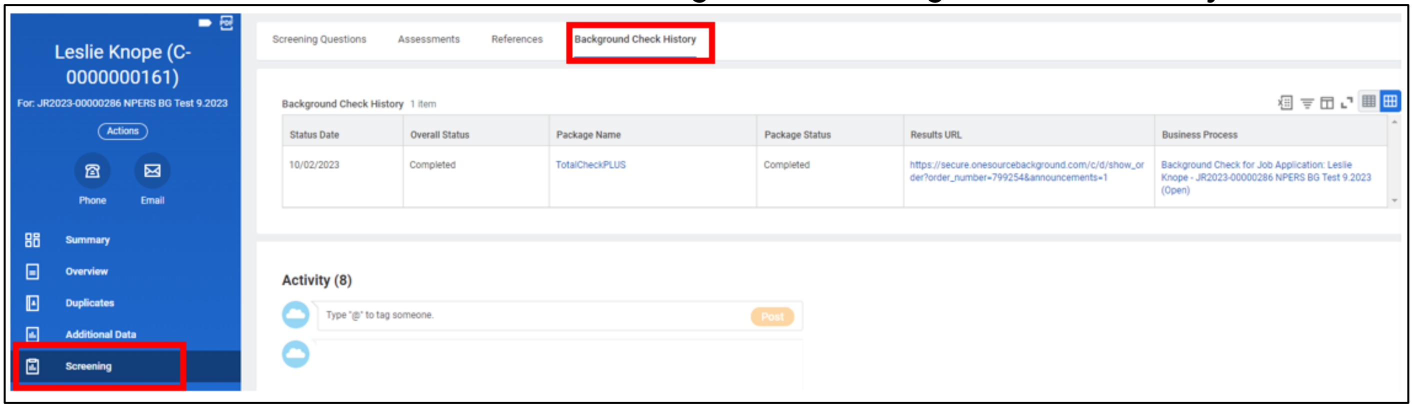
Candidates that are moved to the Background Stage will produce a task for the recruiter to select a background check package, and initiates a background check with OneSource Background Check company, if a prior agreement is in place.

38. Select a Background Check Package.
    NOTE: OneSource packages can ONLY be selected by agencies with a prior agreement with OneSource. These packages have costs and procurement implications and must NOT be selected without a prior agreement. If you do not have a prior agreement with OneSource, you may Select Background Non-OneSource to use for tracking of background checks completed outside of Workday.



39. Click **Submit**.
    NOTE: the candidate will receive tasks to enter government identifiers and personal information once you click submit.
40. If you have a prior agreement with OneSource and are set up to use the integration, OneSource will contact the candidate directly via email with next steps to conduct the checks.

41. The results can be reviewed in the **Screening** tab under **Background Check History**.



42. Once the checks are complete, you'll receive a **Review / Make Background Check Decision** Task. You will either move the candidate forward or decline the application.

    If you do not receive a decision task, you can access the move forward tasks by opening the candidate profile and clicking Actions in the blue menu. Then click Job Application, select the appropriate requisition, click OK, and then you will be presented with the Move Forward/Decline options.

    See notes in the "Ready for Hire – Duplicate records" section <u>prior</u> to moving to ready for hire!

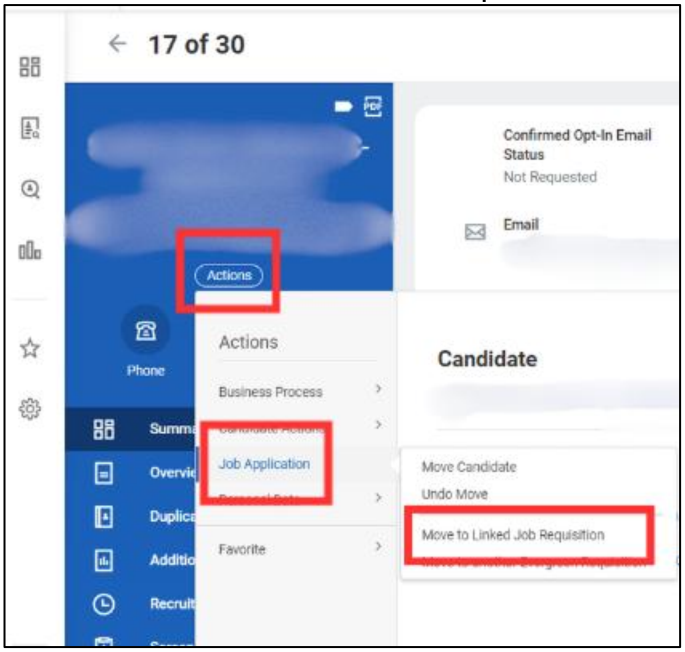
    a. Move Forward – Select from options:
        i. Interview.
        ii. Reference Check.
        iii. Offer.
        iv. Assessment.
        v. Ready for Hire.
    b. Decline
    NOTE: Workday will send automatic non-selection notices for options ii through v below.
        i. Background Check - Candidate Withdrew.
        ii. Background Check – Failed Background Check.
        iii. Background Check - Not selected for hire.
        iv. Background Check - Requisition Canceled.
        v. Background Check - Unable to contact Candidate.

Move Evergreen Candidate to Linked Requisition

Candidates on Evergreen Requisitions cannot be moved to Offer. If you are working with an Evergreen Requisition, you will need to move their application to a linked standard Job Requisition.

43. From candidate profile, on applicable application, select Actions in the blue menu.

44. Click Job Application and then Move to Linked Job Requisition.



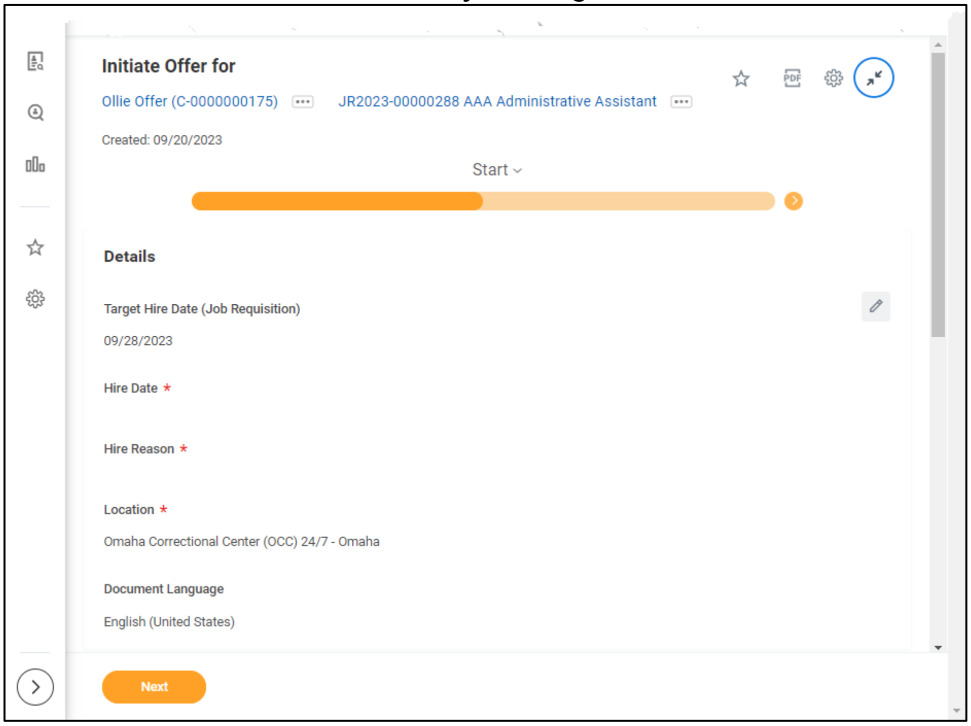
45. Select the appropriate application (from the Evergreen) that needs moved as well as the standard requisition to which it should be moved.

46. Click **OK**.

Move to Offer

Candidates that are moved to the Offer Stage will produce a task for the recruiter to enter offer details and draft and send an offer letter.

47. Open the **Offer** task. Review all the **Details** by clicking the Pencil Icon.



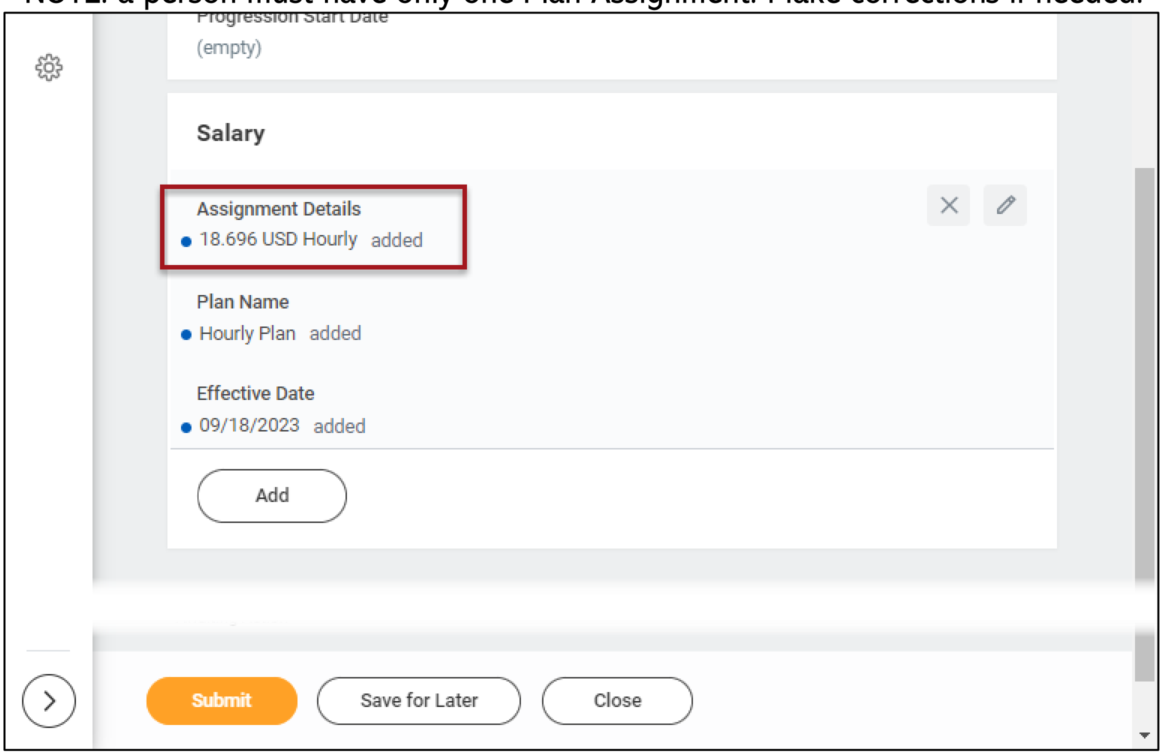
48. Enter the **Hire Date** (when the person will start working).
49. Select the **Hire Reason**.
50. Review the **Location** and **Document Language** for accuracy.
51. Review **Working Time** for accuracy. Update by clicking the Pencil Icon if needed.
    a. IMPORTANT NOTE: Do not change the Default Weekly Hours. Those should ALWAYS be 40. Workday calculates the FTE by dividing the Scheduled Weekly Hours by the Default Weekly Hours; if they are both the same value, the FTE still shows as 100%!
52. Select **Next**.
53. Review information and make edits if needed.
54. Select **Submit.**

Propose Compensation

55. Click Open to complete the Propose Compensation Offer/Employment Agreement step.

56. Review Compensation information, ensuring that everything is correct, especially the compensation (under Salary, Assignment Details). Note, information has populated from the requisition.

57. Verify Compensation and plan information. The Assignment Details should list the rate being offered.
    - NOTE: a person must have only one Plan Assignment. Make corrections if needed.



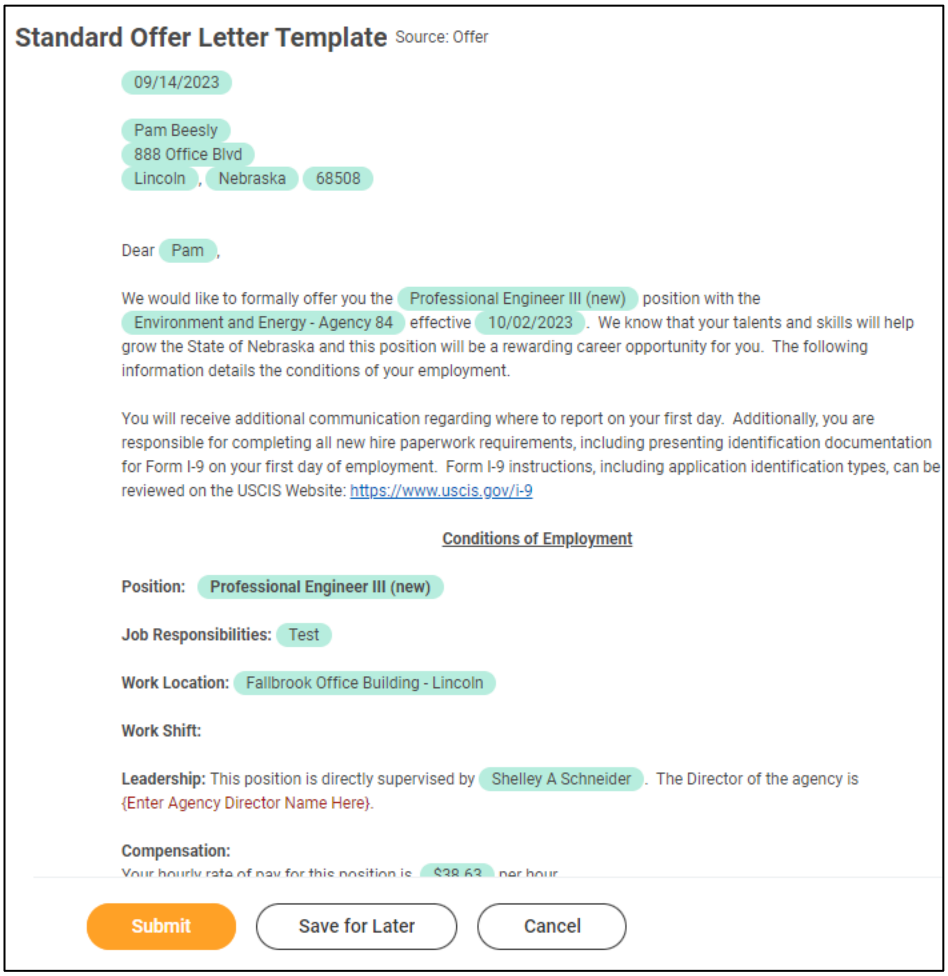
58. Click **Submit**.

Generate Offer Letter

59. From your Workday Inbox, select the Offer Letter item, then click Review to Generate Offer Document.
60. Review **Offer** document.
    a. Add text, if appropriate, and make updates where there is **Red** text.

   i. For example, where it says, "{Enter Agency Director Name Here}," type the name of your Agency Director.
- Delete Red text once updated.
   i. For example, in the Compensation section, where it says the following, remove the line that says {select one}, then remove the "incorrect" line for your agency.
   ii. {select one}
      (a) You will be paid on a biweekly basis every other Wednesday.
      (b) You will be paid on a monthly basis.
- Make other adjustments to text as desired. The letter will send with the exact text as your preview.

61. Select **Submit**.



62. Upon clicking Submit, the Offer Letter is sent to the **Candidate**.

63. The Candidate will need to log into their Candidate Home Account (if external) or Workday Account (if internal) to complete the following tasks. See candidate guides for more information.
    - Accept the Offer.
    - Enter Social Security Number (external only).
    - Enter Personal Information (external only).

64. Once the candidate's offer tasks are complete, you'll receive a **Make Offer Decision** Task. You will either move the candidate forward or decline the application.

If you do not receive a decision task, you can access the move forward tasks by opening the candidate profile and clicking Actions in the blue menu. Then click Job Application, select the appropriate requisition, click OK, and then you will be presented with the Move Forward/Decline options.

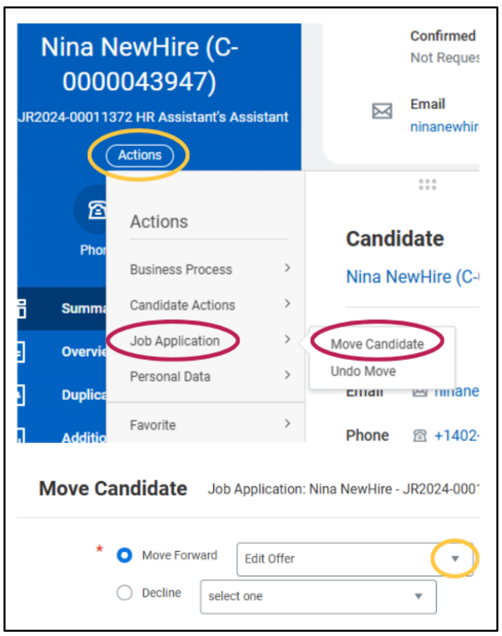
a. Move Forward – Select from options:
   i. Offer.
   ii. Background Check.
   iii. Ready for Hire.
b. Decline

- **NOTE:** Workday will send automatic non-selection notices for options ii through v below.
   i. Offer – Declined Offer.
   ii. Offer – Not internal applicant/employee.
   iii. Offer - Not selected for hire.
   iv. Offer - Requisition Canceled.
   v. Offer - Unable to contact Candidate.

Edit Offer

If an offer needs edited after the original offer is generated, but while the candidate is still in the Offer stage, this can be done through Edit Offer.

a. From the candidate profile, select Actions and then Job Application.
b. Select Move Candidate.
c. Click the Move Forward bubble and then select "Edit Offer" from dropdown list.



   i. This starts the offer process over and will complete the Hire details, Compensation, and Offer Letter tasks again. See Move to Offer section for more information.

- NOTE: Offer history can be viewed on the candidate profile. Select Offer from the Blue menu.
   ii. Click appropriate tab to see Offer Details, Offer History and/or Offer Attachments.

Duplicate Records Check – Merge

IMPORTANT NOTE: After you move a Candidate record to Background Check OR Offer, you MUST check for duplicates in both Workday and the Payroll and Financial Center (JDE / JD Edwards / E1 / Oracle) PRIOR to moving to ready for hire.

If the person's Candidate record does not include her/his Social Security Number, you must enter her/his SSN onto her/his Candidate Record to prevent an incorrect Merge! You can do this by opening the candidate profile and clicking Actions in the blue menu. Select Personal Data and then Edit Government IDs.

You should check the SSN in JDE on the Employee Look-Up screen (Navigator > State of Nebraska > Payroll > EMPLOYEE LOOK-UP) to identify if the person has a prior work history with the State, and, therefore, a prior Employee ID. Knowing the prior Employee ID will help with further searching in Workday and with the Candidate records merge.

If the candidate has a prior worker account in Workday, her/his Candidate record MUST be merged with the previous Worker record. If this does not happen:

- **The candidate will have duplicate accounts, causing issues which require the process to be rescinded until the profiles are merged.**
- **The record will not feed over to the Payroll and Financial Center because of duplicate SSN.**

65. Verify that the Social Security Number for the Candidate matches the SSN on the prior Worker record. Candidate records should not be merged with prior worker records without FIRST verifying a match on the SSN.
    a. Find the candidate in question, navigate to Personal -> IDs (in the blue section). If the person's SSN does not show up on that screen, ask her/him for the information. You can then input the person's SSN on her/his Candidate record.
        i. Click Actions > Personal Data > Edit Government IDs.
        ii. Complete the following fields:
            a) Country = United States of America.
            b) National ID Type = Social Security Number (SSN).
            c) Type the SSN in the Current ID field, verifying that the number you enter matches with the person's ID documentation.
    b. If you are a Recruiter, you will need to have an agency HR Partner do this step – Search for their SSN in Workday using the following format in the search bar: id: 123456789. (Remember the colon and no dashes in the SSN!)
66. MERGE - If the candidate has an old employee account in Workday, you will need to merge their external Candidate record with their old Workday worker account. Do this on the candidate record by navigating to the candidate record, clicking Duplicates in the blue section, and then Merge on the appropriate record. The table below provides inforamtion on how Workday populates duplicates. Note, just because a duplicate is listed, doesn't mean they are a match to your candidate. Verify the SSN match prior to proceeding with a merge.

Type	Description
Candidate name	At least one of these combinations must be an exact match: 1. First letter of the **First Name** and full **Last Name.** 2. Full **First Name** and **Last Name.**
Contact information	The **Phone Number** or **Email** 1. Must be an exact match. Only available for candidate-to-candidate matching. 2. Workday doesn't match phone numbers if the formatting differs. Example: 555-1234 doesn't match with 5551234.
Date of birth	Must be an exact match.
National ID	You can merge records with national IDs that have different expiration or issue dates when the national ID type and ID are the same.

	You can't merge two records that have different values for the same type of national ID. If both the source and target records have national IDs of the same type, either: 1. All of the source's national IDs of that type must be contained within the target's IDs of the same type, or 2. All of the target's national IDs of the same type must be contained within the source's IDs of the same type. Example: You can merge 2 records if the source and target share the same SSN (Social Security Number) and the source has an additional SSN. However, you can't merge the records if they share the same SSN, but both of them have additional, different SSNs. Workday doesn't compare government IDs when identifying duplicate candidates.

67. You will need to confirm and submit on the next page.

Move Forward to Ready for Hire

This is the final step of application process. Candidates who are moved to this stage will populate an inbox task for the applicable HR Partner for next steps in the Hire Business Process or the Change Job Business Process. Note, they should NOT manually initiate the hire or transfer, as this has already been populated by the recruiter moving the candidate record to ready for hire. See Hire Event Guide or Change Job Guide for more information.