

# Human Resource Management System

## Workday Job Aid

### Create, Edit, Close and Freeze Job Requisition



This Job Aid describes the job requisition and evergreen requisition process for People Managers and Human Resource Personnel.

- Employees
- People Managers
- Human Resources

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#### 1. Overview of Recruiting Process

This job aid provides managers and Human Resource Personnel with step-by-step instructions on how to use Workday for some of the most common job requisition tasks. Once a position is approved and/or created through the Department of Audit and Control, it will display on the Suffolk County org chart. If Human Resource Personnel would like to hire for the position, they would create a job requisition first, then go through the create job requisition process.

The Recruiting dashboard application on your Workday Homepage is a helpful starting point and provides access to various recruiting reports.

On every HR Partner's home screen, there is also a menu on the left of the screen. Click the > symbol on the bottom left of the page to expand the menu.

**Shortcuts** are located on the bottom half of the menu which may make it easier to perform recruiting functions. HR Partners can configure the shortcuts to their preference.



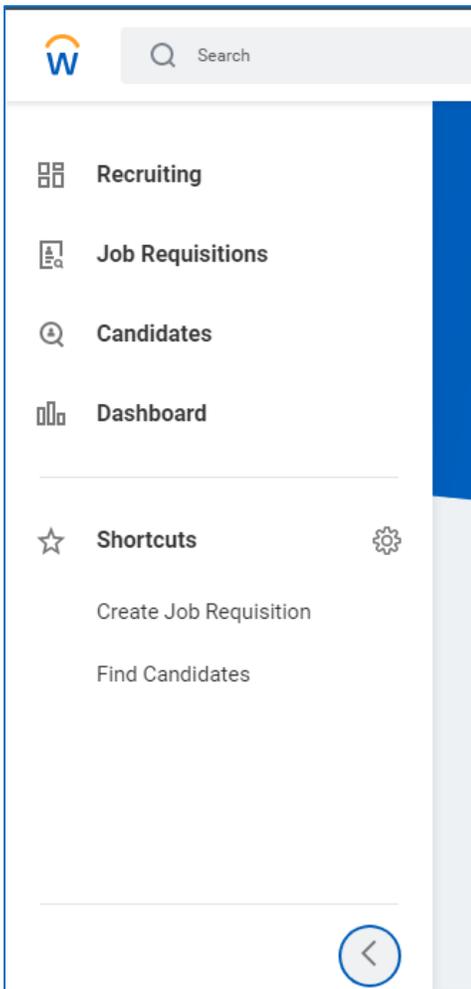
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The **Recruiting** link provides an overview of the recruiting process, including recruiting-related inbox tasks, new internal candidates, new referred candidates, screen tasks, interview tasks, background check tasks, and offer tasks.



The **Job Requisitions** link displays the Job Requisition Workspace. It displays access to all of the job requisitions: you may sort by the hiring manager or by primary location.

The **Candidates** link shows all candidate applications: you can take mass actions on candidates (you can move more than one candidate to different stages of the recruiting process, instead of doing so from an individual job requisition). You can also move one candidate forward, send a message or decline a candidate.

The **Dashboard** link provides access to the recruiting dashboard. Relevant recruiting data is shown in the form of graphic charts and statistics.

The recruiting funnel is used for jobs posted on the county website. **Any job that is not a list appointment uses the recruiting funnel from the first Review stage.**



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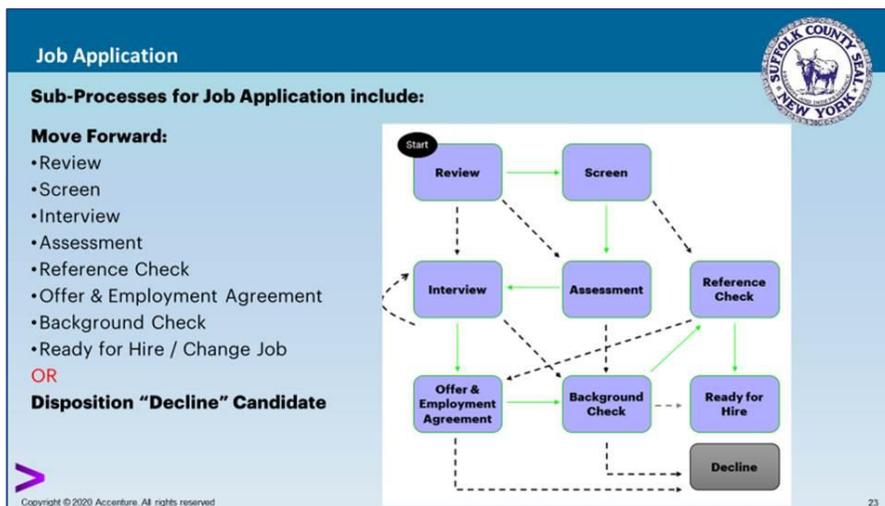
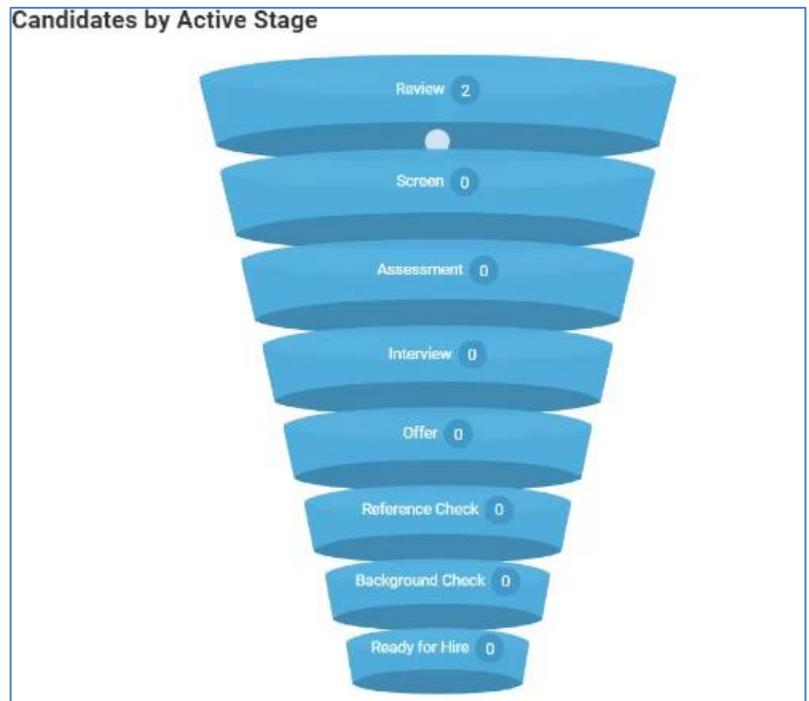
Stages include:

- Review
- Screen
- Assessment
- Interview
- Offer
- Reference Check
- Background Check
- Ready for Hire

Any non-list appointment candidate that applies will automatically go into the first Review stage.

List appointment candidates will be brought into the Screen stage.

This job application process is non-linear, as shown in the below graphic. A candidate may not follow the exact order of each candidate funnel phase.



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## 2. Create Job Requisition

You must create a job requisition for any position (whether list or non-list appointment). The Workday job requisition is used to communicate positions that are “available to fill” in Workday. After your job requisition is approved, a Primary Recruiter will be assigned to your Job Requisition to proceed with the job posting.

Before you begin, you will need to have the following information:

- Supervisory Organization
- Position ID or name
- Reason Code
- Recruiting Start Date
- Target Hire Date

You (Manager or HR Partner) will create a job requisition- the job requisition is created when there is a list request or a job posting request. Job requisitions are always created for existing positions.

**Note:** Use the  symbol on the top right of the page to enable Workday guided tours- this provides tips and additional information to help you properly fill out each field: a  symbol appears to the right of various fields. Click this symbol to see the help text.

1. From the Workday Homepage, search for “create job requisition” within the search bar and select the **Create Job Requisition** task.

**Note:** You can also use the **Create Job Requisition** shortcut on your dashboard.

**Note:** The field **Copy Details from Existing Job Requisition** may be used if you wish to select an existing job requisition that already exists for your position without having to complete a new one.



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2. Enter the **Supervisory Organization** (it automatically defaults your name in as the supervisory organization, so you must choose the supervisory organization that contains the position you wish to fill).
3. Select **For Existing Position** and click within the prompt field to select the specific position.

**Create Job Requisition**

Always select "For Existing Position" when creating a Requisition.

Copy Details from Existing Requisition

Supervisory Organization

Create New Position

For Existing Position

Worker Type \* Employee

- P100022 OFFICE ASSISTANT (SPANISH SPK) - DEBRA COURTNEY
- P100023 COBRA - COBRA Test
- P100024 ASSETS ANALYST - Daisy Duck
- P100025 Part Time Employee - Winnie Pooh
- P100026 STUDENT INTERN I - Captain Hook
- P100027 ASSETS ANALYST - Eli Manning
- P100029 Adjunct Faculty - Captain Smea
- P100030 College Aids - Mickey Mantle

Search

**Note:** You will not be creating a new position: new positions will be loaded into Workday by the Department of Audit and Control. **Never select 'create a new position.'** You will only ever create a job requisition for an existing position.

**Note:** If you know that an employee is already in the process of having a termination and you want to fill their position (due to the employee vacating the position), you can select an employee already in a position. Otherwise, choose an unfilled position.



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4. Select the **Worker Type**.

**Note:** The Worker Type will always be **Employee**.

5. Click **Ok**.

You are now on the Recruiting Information section of the **Create Job Requisition** process.

6. Select the **Reason** for the job requisition.

**Note:** You will either choose **Addition** or **Replacement**. The **Addition** is used for unfilled positions, such as those with a new position or new title. The **Replacement** is used for filled positions that will need a replacement, such as positions that were filled by someone who is on leave, resigned, retired, or is in the process of termination.

7. Select the **Recruiting Instruction**.

#### Recruiting Instructions explained:

- *List Appointment, No Posting (Integration)* – The list request and the canvas are done outside Workday as per usual. When the canvass is done, a job requisition is to be created and an integration procedure is performed. This integrates the candidate’s exam application into Workday at the screen stage where they can be moved through the recruiting process.
- *No-list, no posting (HAS Civil service Minimum Qualifications)* – A job requisition is created for a position that has no list and does not need to be posted. This could include a provisional candidate who has already been chosen by the department so no posting is needed (the provisional candidate still needs to meet the Civil Service minimum qualifications of the position). At this time, Workday does not offer an option to have an employee apply for a job that is not posted. These candidates will have to fill out the paper application and the application will go to Civil Service for approvals outside of Workday as per usual. To hire a candidate into

select one

- List Appointment, No Posting (Integration)
- Non-list, no posting (HAS Civil Service Minimum Qualifications)
- Non-list, no posting (NO Civil Service Minimum Qualifications)
- Post Externally Only (HAS Civil Service Minimum Qualifications)
- Post Externally Only (NO Civil Service Minimum Qualifications)
- Post Internally and Externally (HAS Civil Service Minimum Qualifications)
- Post Internally and Externally (NO Civil Service Minimum Qualifications)
- Post Internally Only (HAS Civil Service Minimum Qualifications)
- Post Internally Only (NO Civil Service Minimum Qualifications)

select one ▼



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Workday, the candidate is to be put into the pre-hire stage right from the job requisition (there is a drop-down list with hire options in the job requisition view).

- *No-list, no posting (No Civil Service Minimum Qualifications)* – A job requisition is created for a position that has no civil service minimum qualifications **and** no list. This could include an exempt position. Use the same hire procedure as the No-list, no posting (HAS Civil Service Minimum Qualifications) above.
- *Post Externally Only (HAS Civil Service Minimum Qualifications)* – A job requisition is created for a position that has civil service minimum qualifications but no list exists. This could include a provisional position, non-competitive position, labor position, seasonal position, or part-time position.
- *Post Externally Only (NO Civil Service Minimum Qualifications)* – A job requisition is created for a position that has no civil service minimum qualifications **and** no list. This could include an exempt position.
- *Post Internally and Externally (HAS Civil Service Minimum Qualifications)* – A job requisition is created for a position that has civil service minimum qualifications. The position is to be posted internally and externally (within Workday and on the Civil Service external Career site).
- *Post Internally and Externally (NO Civil Service Minimum Qualifications)* – A job requisition is created for a position that does not require a civil service examination and has no civil service minimum qualifications. This could include an exempt position. The position is to be posted internally and externally (within Workday and on the Civil Service external Career site).
- *Post Internally Only (HAS Civil Service Minimum Qualifications)* – A job requisition is created for a position that has civil service minimum qualifications. The position is to be posted internally only (only within Workday).
- *Post Internally Only (NO Civil Service Minimum Qualifications)* - A job requisition is created for a position that has no civil service minimum qualifications. The position is to be posted internally only (only within Workday).

**Civil Service Minimum Qualifications in the above instructions refers to positions with established minimum qualifications that appear on the job specification**

**NO civil service Minimum Qualifications in the above instructions refers to positions where the appointing authority establishes the minimum qualifications**



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8. The **Recruiting Start Date** defaults to today's date.
9. Choose the **Target Hire Date** as today's date if you do not have a Target Hire Date, otherwise, add the date that the recruiter plans to fill this position by.

**Note:** If you select **Spotlight Job**, the job is placed at the top of the job postings when advertised.

10. Click **Next**.

You are now in the Job section of the **Create Job Requisition** process.

11. You should see the Job Details automatically loaded into Workday based on the job posting title and the reason. Read over the Job Description Summary and Job Description. If there is anything unique to this position that is not currently included, edit these sections to reflect the exclusive tasks and responsibilities that this position entails. Other relevant information is also preloaded based on the selected job title.

**Note:** Revised descriptions are to be approved by Civil Service. The job details will be reviewed if the job is to be posted.

12. Click **Next**.

You are now on the Qualifications section of the **Create Job Requisition** process.

13. Skip this page by clicking **Next** at the bottom of the page.

You are now on the Organizations section of the **Create Job Requisition** process.

14. Select County of Suffolk as the **Company**. All information is defaulted in. You may review this page to ensure all information loaded is correct. Click **Next**.

You are now on the Attachments section of the **Create Job Requisition** process.



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15.If you have any documents you wish to add to the job requisition you may click the **Add** button and attach a file from your computer.

16.Click **Next**.

You are now on the Assign Roles section of the **Create Job Requisition** process.

17.Click **Add**.

18.Select **Primary Recruiter** as the **Role**.

19.Select the employee **Assigned To** this role (select yourself).

20.Click **Next**.

You are now in the Compensation section of the **Create Job Requisition** process.

21.All information on the Compensation section is defaulted in. You may review this page to ensure all information loaded is correct. Click **Next**.

22.Click **Next**.

You are now on the Summary section of the **Create Job Requisition** process.

23.Review all information to ensure it is reflective of the job requisition you wish to create.

24.Click **Submit**. Alternatively, you may select **Save for Later** to go back to this job requisition before submitting it.

**Note:** If you missed filling out any information, Workday will send you an alert to go back and fill in the required information.

You have now submitted the Job Requisition.



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**Note:** If the job requisition is for a position other than a list appointment, then the create job requisition will be reviewed by a Civil Service classifications analyst.

#### **The Classifications Analyst will perform the following:**

- From your Workday Homepage, go to your inbox.
- Select the message "Job Requisition: [Position Number][Position Name]"
- Review the Create Job Requisition and determine if the title is appropriate.
- If the title is appropriate, click **Approve**. If the position is not appropriate, click **Send Back** and list a reason why the title is not appropriate.

**Note:** You may also click the **Deny** button which will terminate the Create Job Requisition business process.

### **3. Post Job**

Once a job requisition (that is to be posted) is created (and approved by a Classifications Analyst if applicable), the job must be posted by the Recruiting Coordinator.

1. From the Workday Homepage, go to your inbox.
2. Select the message "Post Job: [Position Number][Position Title]."
3. Select the **Job Posting Site**. The Recruiting Instruction was established in the creating of the job requisition. You can select more than one option (for example, external and internal). Select all that apply.
4. Check the box below if you wish to preview the job posting.
5. Click **Ok**.

**Note:** If you check the box to preview the job posting, you are then given the ability to edit the Job Requisition. If you make any edits to the job requisition, you must list a reason for making such edits.



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6. Verify the **Start Date** and **End Date** of the Job Posting. Check the box if you wish the job to be a **Primary Posting**. You may enter a comment such as the date you are submitting the **Post Job** task.
7. Click **Submit**.
8. You have successfully posted the job.

**Note:** Once you have posted the job, be sure to write down the job requisition number so that you can easily search and find the posting in the future (you would type the job requisition number into the search to find it).

**Note:** Once a job is posted, the Primary Recruiter and the Recruiting Analyst (Civil Service Classifications Analyst) are notified of the job posting through a notification in Workday.



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#### 4. Edit Job Requisition

You may edit open/frozen job requisitions:

1. From the Workday Homepage, search for “edit job requisition” within the search bar.
2. Select the **Edit Job Requisition** task from the search results.
3. Select the Job Requisition you wish to edit.

**Note:** The quickest way to search for the requisition is by entering the requisition number. You can also search by the manager's name or the job title.

4. Click **Ok**.
5. Select the **Reason** for editing the Job Requisition.
6. You may now edit information within the Job Requisition you selected. You can skip to different tabs of the Job Requisition by clicking the tabs on the left of the page.
7. You may click **Summary** from the tabs on the left to edit the job requisition from a single screen.
8. Click **Submit** at the bottom of the Summary page.
9. Click **Done**.
10. After approvals, the job requisition will route to the Recruiting Coordinator to un-post and repost so changes are displayed to candidates.

**Note:** If corrections are made to a job posting such as location, job title, job description, etc., then the job posting will get updated. If however, other information changes that would not affect the posting such as the primary recruiter, then the job posting will not get updated.



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#### **To update the job posting, the Recruiting Coordinator should do the following:**

1. Go to your Workday inbox and select the message "Update Job Posting: [Position Number][Position Title]."
2. You are now un-posting the original job requisition. Click **Submit**.
3. You must now re-post the edited job requisition. Go to your workday inbox and select the message "Post Job: [Position Number][Position name]."
4. Select the **Job Posting Site**.
5. Click **Ok**.
6. Verify the **Start Date** and **End Date** of the Job Posting. Check the box if you wish the job to be a **Primary Posting**. You may enter a comment such as the date you are submitting the **Post Job** task.
7. Click **Submit**.
8. You have successfully reposted the job.



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#### 4. Close Job Requisition

When it is decided that candidate recruitment should end for a position, a job requisition should be closed. The Close Job Requisition task is performed to close the open job requisition in Workday.

**Note:** There is no approval required to close a job requisition. If the requisition is closed erroneously, a new requisition should be created or the business process may be rescinded. Contact the Recruiting Coordinator to request that the business process be rescinded.

1. From the Workday Homepage, search for “close job requisition” within the search bar and select the **Close Job Requisition** task.
2. Search **Create Job Requisition** within the search bar and select the **Create Job Requisition** task.
3. Select the **Job Requisition**.

**Note:** The quickest way to search for the requisition is by entering the requisition number. You can also search by the manager's name or the job title.

4. Click **Ok**.
5. Select the **Reason** for closing the job requisition.  
**Note:** Your name will appear as the **Requester**.
6. Select the **Close Date**.  
**Note:** If you wish, select the check box next to **Close Unfilled Positions**.  
**Note:** You may enter a comment at the bottom of the screen, such as an additional explanation regarding the closing of the job requisition.
7. Click **Submit**.

**Note:** When you close a job requisition, the job posting is automatically taken down.



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#### 5. Freeze Job Requisition

You can freeze or unfreeze a job requisition. The requisition must not be filled or closed. There are various reasons why you might need to 'freeze' a job requisition, including a budget, a business requirement, or a manager's availability to interview. If a job has been posted already, you should notify any active candidates that it has been frozen/unfrozen so they are aware of the status of the job.

1. From the Workday Homepage, search for "Manage Job Requisition Freeze" and select the **Manage Job Requisition Freeze** task.
2. Select the Job Requisition.

**Note:** The quickest way to search for the requisition is by entering the requisition number. You can also search by the manager's name or the job title.

3. Click **Ok**.
4. Select the **Freeze/Unfreeze Reason**.
5. Select the **Freeze/Unfreeze Date**.
6. Check the box next to **Frozen** to set the status to frozen. Uncheck the box if you are unfreezing the job requisition.
7. If you wish, you may write a comment further describing the reason for the job requisition freeze/unfreeze.
8. Click **Submit**.

**Note:** If the job has been posted previously and becomes frozen, it will automatically be unposted. If the job that is to be posted becomes unfrozen, the Recruiting Coordinator will receive a notification in their inbox to post the job.



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#### 5. View/Cancel Job Requisition

To view a job requisition:

1. From the Workday Homepage, select the **Recruiting** application.
2. Within the View section, select **Job Requisition**.
3. Select the **Job Requisition**.
4. Click **Ok**.
5. You are now viewing the job requisition.

The screenshot shows the Workday interface for a job requisition. At the top, it displays 'JR100237 Office Assistant (Open)' with a search icon and a refresh icon. Below this, there are three rows of information: 'Recruiting Start Date' (03/24/2021 - Today) with a cloud icon and 'TAHIR SHAMIM' (Hiring Manager); 'Target Hire Date' (03/24/2021 - Today) with a cloud icon and 'ADRIENNE CLEMENS | ADRIAN CLEMENS' (Recruiter); and 'Primary Location' (H LEE DENNISON BLDG) with a location pin icon. To the right of these rows are three columns with '0' in a circle, labeled 'Review', 'Interviewing', and 'Offered'. Below this is a navigation bar with tabs: 'Overview' (selected), 'Candidates', 'Details', 'Organizations', 'Qualifications', and 'Job Postings'. Under the 'Overview' tab, there is a button labeled 'Extend My Search'. At the bottom, there is a 'Candidate Pipeline' section with a bar chart showing 'Active Candidates' (0), 'Referral' (0), 'Internal' (0), and 'Inactive' (0).

**Note:** You can also view job requisitions by searching for the **View Job Requisition** task in the workday search bar and selecting this task within the search results. Additionally, you can open the Recruiting Dashboard on the left side of your Workday page and click the **Job Requisitions** shortcut. Lastly, you can view open job requisitions by searching for the supervisory organization in Workday, selecting the supervisory organization, and selecting the **Staffing** tab.



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If you submitted the **Create Job Requisition** task and the process has not yet been completed, you may cancel the job requisition:

1. From the Workday Homepage, select your inbox.
2. Within the Archive section, select the Job Requisition that you wish to cancel.
3. Click **Cancel** at the bottom of the message. This button cancels the **Create Job Requisition** process that you started.
4. Write a comment describing your reason for canceling the **Create Job Requisition** business process.
5. Click **Submit**.

**Note:** You can also go into the Archive section of your inbox to view the submitted task. For tasks you can rescind, a **Rescind** button will be listed on the bottom of the screen. Click this button to rescind the previously completed task.



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#### 6. Create Evergreen Requisition

Evergreen requisitions allow you to have a steady flow of candidates for high-volume positions. Please be advised, candidates **cannot be hired** directly from an evergreen requisition. They must first be moved to a regular, linked job requisition. Please note, only the Recruiting Coordinator can create evergreen requisitions.

1. From the Workday Homepage, search for "Create Evergreen Requisition" within the search bar.
2. Select the **Create Evergreen Requisition** task from the search results.
3. Select the **Supervisory Organization** and select **Employee** as the **Worker Type**.
4. Click **Ok**.

You are now on the Recruiting Information section of the **Create Evergreen Requisition** process.

5. Select the **Recruiting Instruction**. Select to **post internally and externally**.

**Note:** If you choose an instruction other than a list appointment, then the job requisition will be sent to a classifications analyst.

6. Select the **Recruiting Start Date**.

**Note:** The **Recruiting Start Date** defaults to today's date.

**Note:** You may list a **Target Hire Date**. Please be advised, this date populates within the offer process.

7. Click **Next**.



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You are now in the Job section of the **Create Evergreen Requisition** process.

8. Select a **Job Profile**, then fill in the **Job Posting Title**.
9. Scroll down and select the **Worker Sub-Type** and **Time Type**.
10. If there is already at least one job requisition available to link to this evergreen requisition, scroll down to the **Link to Job Requisitions** section (Otherwise, this step can be completed at any time before hire).
11. Select the current job requisition(s) for that role. You will move candidates from the evergreen requisition to these requisitions at the offer stage.

**Note:** The Job Profile of the job requisition(s) **must match** the profile of the evergreen requisition.

12. Click **Next**.

You are now on the Qualifications section of the **Create Evergreen Requisition** process.

13. Skip this page by clicking **Next** at the bottom of the page.

You are now on the Organizations section of the **Create Evergreen Requisition** process.

14. Select County of Suffolk as the **Company**. All information is defaulted in. Click **Next**.

You are now on the Attachment section of the **Create Evergreen Requisition** process.

15. Click the **Add** button to attach any relevant documents to this requisition.
16. Click **Next**.



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You are now on the Compensation section of the **Create Evergreen Requisition** process.

17. All information on the Compensation section is defaulted in.
18. Click **Next**.

You are now on the Assign Roles section of the **Create Evergreen Requisition** process.

19. Click the **Add** button.
20. Select **Primary Recruiter** as the **Role**.
21. Select the employee **Assigned To** this role (select yourself).
22. Click **Next**.

You are now on the Summary section of the **Create Evergreen Requisition** process.

23. Review all information to ensure it is reflective of the evergreen requisition you wish to create.
24. Click **Submit**. Alternatively, you may select **Save for Later** to go back to this job requisition before submitting it.

You have now submitted the Evergreen Requisition.

**Note:** Now the evergreen requisition must be posted. Follow the [Post Job](#) lesson for further instructions on how to post the evergreen requisition. Note that you also have the option to make changes to the requisition by clicking **Edit Evergreen Requisition** within the **Post Job** task in your inbox.



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## 7. Change Evergreen Requisition

If you wish to edit an evergreen requisition (such as a job title, job description, or wish to link an evergreen requisition):

1. Enter "edi eve" in the Workday search bar.
2. Click on the "Edit Evergreen Requisition" task in the result set returned.
3. Select the **Evergreen Requisition** from the list provided.
4. Click **Ok**.
5. Click on the **Recruiting Details** section on the page.
6. Select a **Reason** for editing the requisition.

If you wish to link the evergreen requisition to a job requisition, follow steps 7 - 9. Otherwise, skip to step 10.

7. Go to the **Job** section by clicking the Job tab on the left and scroll down to **Link to Job Requisitions**.
8. Click **Job Requisitions**.
9. In the **Add/Remove** field, search for and select the requisition(s) you want to link. (Note: you can only link requisitions that have the same Job Profile as the evergreen requisition).
10. Make any relevant changes to the evergreen requisition by visiting the tabs on the left of the page.
11. Click **Next** to move through the remaining sections.



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12. Click **Submit**.

**Note:** When making changes to an evergreen requisition, you must update the job by unposting the job and reposting the job (this is only done by the Recruiting Coordinator).

#### **To update the job posting, the Recruiting Coordinator should do the following:**

1. Go to your Workday inbox and select the message "Update Job Posting: [Position Number][Position Title]."
2. You are now un-posting the original evergreen requisition. Click **Submit**.
3. You must now re-post the edited evergreen requisition. Go to your workday inbox and select the message "Post Job: [Position Number][Position name]."
4. Select the **Job Posting Site**.
5. Click **Ok**.
6. Verify the **Start Date** and **End Date** of the Job Posting. Check the box if you wish the job to be a **Primary Posting**. You may enter a comment such as the date you are submitting the **Post Job** task.
7. Click **Submit**.
8. You have successfully reposted the evergreen requisition.



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#### **If the Recruiting Coordinator wishes to update the Primary Recruiter:**

1. From the Workday Homepage, select the **Recruiting Dashboard** application.
2. From the Actions section, select **My Open Job Requisitions**.
3. Select the **Workday Organization Role**.
4. Click **Ok**.
5. Click the related actions button next to the evergreen requisition you wish to change/link (three yellow dots).
6. Select **Roles > Assign Roles**.
7. Select the Effective Date.
8. Click **Ok**.
9. Change the **Assigned To** selection to the Primary Recruiter you wish to assign.
10. Click **Ok**.

Candidates **cannot be hired** directly from an evergreen requisition. They must first be moved to a regular, linked requisition. Moving a candidate from an evergreen to a linked requisition:

1. From the Workday Homepage, select the **Recruiting Dashboard** application
2. From the Actions section, select **My Open Job Requisitions**.
3. Select the **Workday Organization Role**.



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4. Click **Ok**.
5. Go to the evergreen requisition and select the candidate.
6. Click **Move to Linked Job Requisition**.
7. Select a linked requisition.
8. Click **Ok**.



# Human Resource Management System

## Workday Job Aid

### Create, Edit, Close and Freeze Job Requisition



#### 8. Close Evergreen Req.

If any open requisitions are still linked to the evergreen requisition, you must unlink them before closing the evergreen requisition. To do so, follow the process to Edit an Evergreen Requisition by searching for **Edit Evergreen Requisition** from the search bar. Go to the Job section, scroll down to the Link to Job Requisitions section. Click the **Job Requisition** field, then click the **X** next to all listed requisitions. Click **Next** to move through the other sections. Click **Submit**.

To close an evergreen requisition:

1. From the Workday Homepage, search for "Close Evergreen Requisition" within the search bar.
2. Select **Close Evergreen Requisition** from the search results.
3. Select the **Evergreen Requisition**.
4. Click **Ok**.
5. Select the **Reason** for closing the evergreen requisition.
6. Select the **Close Date**.
7. Click **Submit**.



