Human Resource Management System

Workday Job Aid
Manage Recruiting

This Job Aid describes the Recruiting Process for People Managers and Human Resources Personnel.

- ○ Employees
- ● People Managers
- ● Human Resources

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1. Review Candidate

Stages of the Job Application Process:

As the process of reviewing and choosing candidates is dynamic, candidates may not go through every stage of the recruiting process:

- **Review**- When a candidate applies for a position (non-list appointment), they are initially assigned the Review stage.
- **Screen**- The candidate details are viewed to determine the next steps
- **Assessment**- Utilized for positions that require testing
- **Interview**- Candidates that are approved by Human Resources to interview will be placed in the interview status. Interviews can be scheduled in person or over the phone
- **Reference Check**- Reference checks are performed outside of Workday and then submitted as completed within Workday
- **Offer**- Managers initiate the offer once the interviews and reference checks are completed
- **Background Check**- Background checks are processed by Human Resources once the offer has been accepted
- **Ready for Hire**- This step will initiate the onboarding process

When a candidate applies for a (non-list appointment) position, they automatically go into the review stage of recruiting (unless a candidate states in their application that they are not legally authorized to work in the United States, in which case, the candidate will not appear in the review stage). List appointments will appear in the screen stage of recruiting.

Note: For candidates that are not coming off a list, the position is non-competitive and there was no posting, the candidate can be brought straight into the pre-hire process (from the job requisition, go to **Actions > Hire > Hire Employee**). For these situations, the application process and review of civil service minimum qualifications occurs outside of Workday.

Note: To see the recruiting funnel for a particular job requisition (where you can view/track the status of candidates in each stage of the recruiting process), click the **Recruiting** application from the Workday Homepage, under the View section select **My Recruiting Jobs,** click **Ok,** then click on the title of the job requisition (blue hyperlink on the left).

To review candidates:

1. From the Workday Homepage, click on the **Recruiting** application.

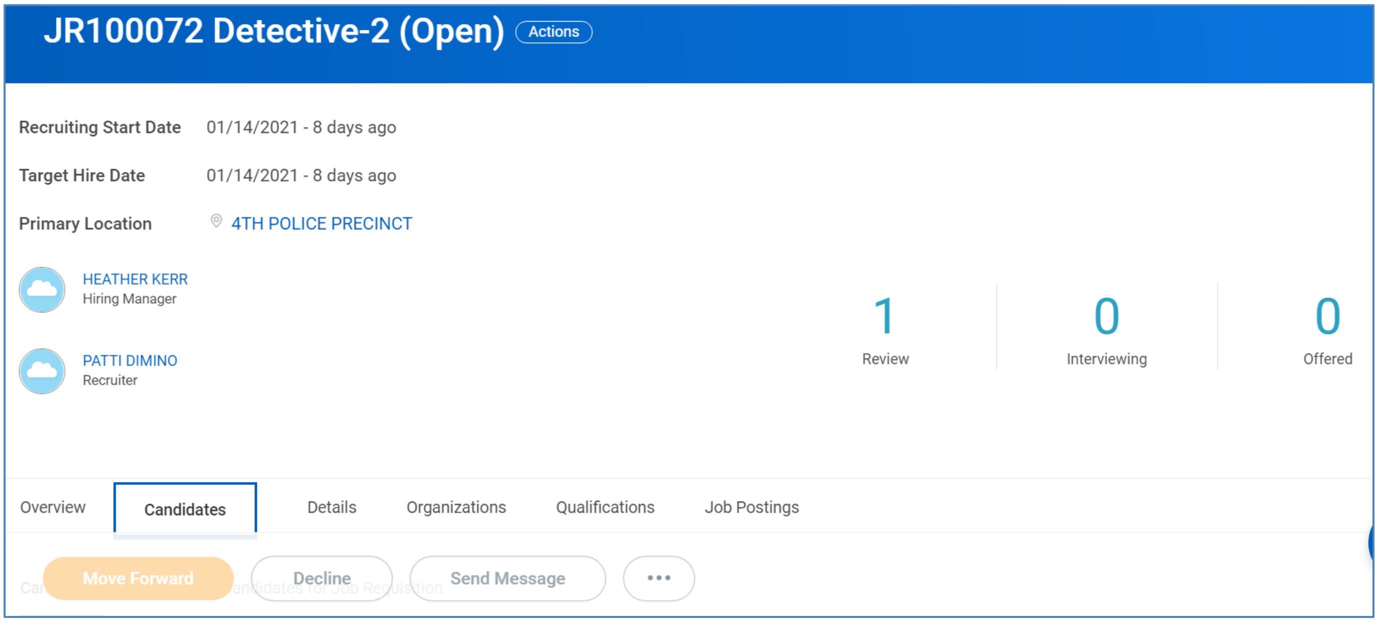
2. Go to the **Recent** section and click on the job requisition number.

Note: You can also type the job requisition number within the search bar at the top of the page. You may also go into the **Recruiting** application, select **Job Requisition** from the View section, and enter the job requisition number or search for the title.

The requisition screen appears with six tabs; click on each tab to review the information in each area.

- Overview
- Candidates
- Details
- Organizations
- Qualifications
- Job Postings

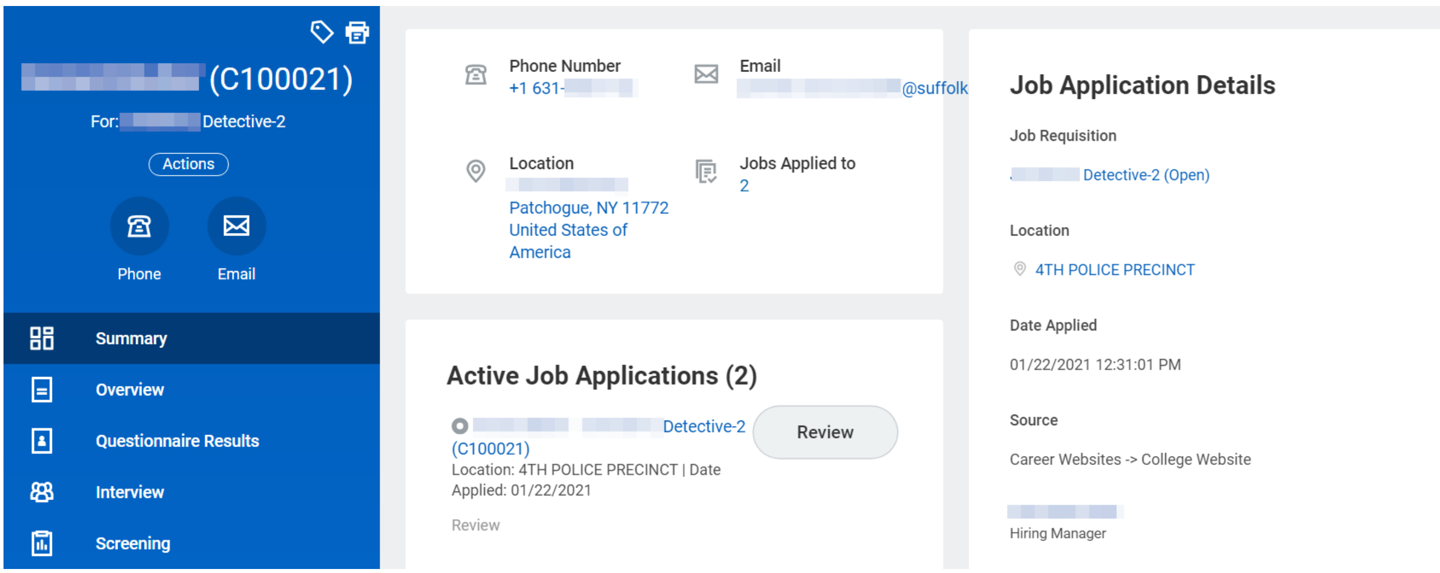
Note: You can see the number of candidates to be reviewed on the right side of the screen.



3. Click on the **Candidates** tab.

4. You are now viewing the applicants for this position, including where applicants are within the recruiting process (review, screen assessment, interview, offer, reference check, background check, ready for hire).

5. If you click on the candidate's job application (in the form of a blue hyperlink on the left), you will now see the candidate's Workday job application page.



6. You will see the candidate's applications listed under **Active Job Applications.** This screen is where you view the candidate's qualifications. If you click **Review** within the specific application on the candidate's page, you will see the same information. You can review the candidate's **Job Application Details**, **Work History**, **College, University or Professional Schools**, **Languages**, **Websites,** and **Skills**.

7. Once the review has been completed, you may move the candidate forward to the next job application phase at the bottom of the page, or **Decline** and select a related reason for the decline. If you move the candidate on to the next phase, the candidate moves on to another step in the recruiting process.

Note: For a posted job, only the Recruiting Coordinator or Primary Recruiter can move from the Review to Screen stage.

You have completed the review process.

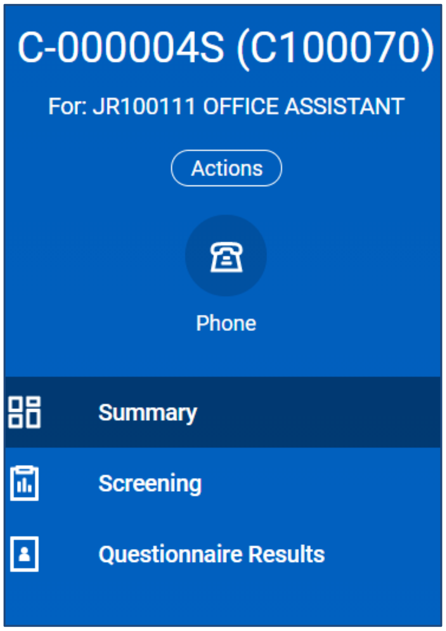
2. Screen Candidate (Exams Analyst or Classifications Analyst)

Recruiting Analyst (Classifications Analyst) or Exams Analyst

If a position is a posted job, the candidate is screened by a Classifications Analyst. Candidates must also undergo an official minimum qualifications review by Civil Service.

1. To screen a candidate within the recruiting process, either the Exams Analyst or Classifications Analyst will perform the screening. Begin at the Workday Homepage and enter the job requisition number within the search bar. (You may also receive a notification via a task within your Workday inbox to complete the screening).

2. Select the job requisition and view the candidate funnel to see the number of candidates in the 'screen' stage.



3. Select the **Candidates** tab and click on the related screen button to the right of the candidate's name (Exams only screen or Classifications Only Screen).

4. **If Exams Analyst:**

   Answer the related questionnaire (Does the candidate meet the minimum qualifications [MQs]?) then click **Submit**.

   If Classifications Analyst:

   Answer the related questionnaire (Is this title approved, does the application have to be approved by exams, does the candidate meet the minimum qualifications?).

Note: The Analyst reviewing the application must select **Questionnaire Results** from the candidate's Workday job application profile. This will show whether any experience was not full-time. Any part-time experience (under 35 hours per week) must be pro-rated. You may also view any experience not considered full-time by going to the candidate's tab within the job requisition and scrolling to the right column to see the candidate's **Under FT Hours**- this shows the employees who listed within their job application any experience under the 35 hours per week.

- If the title is approved, you must notify the Exams Analyst to review it.
- Once related questions are answered, click **Submit**.
- Exams will now screen the candidate for the minimum qualifications.

  Recruiting Coordinator:

  a. From the Workday Homepage, go to your inbox and select the message "Exams Screen for MQs: [Candidate Name] – [Job Requisition Number] – [Position name]."
  b. Answer the question if the candidate meets the minimum qualifications.
  c. Click **Submit**.

8. Once the screening has been completed, the Primary Recruiter will be notified to complete the screening and move the candidate onto the next phase of recruiting.

Primary Recruiter:

1. Once the screening has been completed by the Classifications Analyst, you may go to the job requisition and change the job application phase of the candidate:

   - Select the Candidates tab to view the candidates.
   - Select the check box to the left of the candidate name (blue hyperlink) that you wish to move from the screen phase.
   - Either press **Move Forward** at the bottom of the page, or **Decline** and select a related reason to the decline. If you press **Move Forward**, the candidate moves on to another step in the recruiting process.
   - Click **Ok**.

You have completed the screening process.

3. Assess Candidate (candidate completes County assessments)

An employee may be asked or required to complete an assessment as part of the hiring process (typing test, language proficiency exam, psychological testing, etc.).

Please be advised, the Assessment is to be completed outside of Workday. When this assessment has been completed (the candidate passes or fails the testing), follow the steps below:

Primary Recruiter:

1. To bring a candidate within the Assessment process, begin at the Workday Homepage and enter the job requisition number within the search bar. (You [Primary Recruiter] may also receive a notification via a task within your Workday inbox to complete the Assessment stage).

2. Select the job requisition and view the candidate funnel to see the number of candidates in the 'Assessment' stage.

3. Select the **Candidates** tab and click on the **Assess** button to the right of the candidate's name.

4. Select the **Overall Date** (the date the assessment was completed, i.e. typing test, oral language proficiency exam, etc.).

5. Select the **Overall Status.**

    - You may choose No Longer Applies, Pass, Fail, or Pending.

6. You may place a comment that further explains the candidate's testing.

7. Click **Submit** at the bottom of the page.

8. Now you must make an Assessment Decision. Go back to the candidate's job application (you may choose to find the job requisition number within the search bar or follow the task in your Workday inbox to complete the Assessment).

9. From the **Candidates** tab, click the **Assessment Decision** button next to the candidate's name.

10. Either press **Move Forward** at the bottom of the page, or **Decline** and select a related reason to the decline. If you press **Move Forward**, the candidate moves on to another step in the recruiting process.

11. Click **Ok**.

You have completed the Assessment process.

4. Interview Candidate (Ex: Rate Interview step for Mgr.)

A candidate may be scheduled either for an In-Person Interview or a Phone Interview. Once a candidate enters the interview phase of the recruitment phase, the Primary Recruiter must schedule the interview.

Primary Recruiter:

1. Begin at the Workday Homepage and enter the job requisition number within the search bar. (You may also receive a notification via a task within your Workday inbox to schedule a candidate for an interview).

2. Select the job requisition and view the candidate funnel to see the number of candidates in the 'Interview' stage.

3. Select the **Candidates** tab and click on the **Schedule** button to the right of the candidate's name.

4. Select the **Date** of the interview.

5. The **Time Zone** should default to Eastern Time.

6. Select the **Interviewers** (you may add multiple individuals).

   - Click the + symbol on the left side of the chart to add a row for each interviewer to be added.
   - Select the **Interviewer.**
   - Select the **Duration** of the interview.
   - Select the **Interview Type.**
   - Select the **Competencies** that will be evaluated during the interview.
   - If applicable, select a **Questionnaire** you wish the interviewer to fill out during the interview.
   - If applicable, you may write notes to the interviewer.

7. If using the same location for the interview, check the box under **Location Selection**.

8. Under **Recommended Interview Settings**, you may view the defaulted **Earliest Start Time** and **Latest End Time**, along with the **Range of Dates**.

9. Click **Next**.

10. From the calendar, select the date and time of the interview.

Note: You may also click the **Recommend Times For Me** button to see recommended times for the interviewer(s).

11. Click **Ok**.

12. Click **Next**.

13. Verify the proposed interview schedule: the interviewer(s), start time, end time, location, interview type, competencies, and questionnaires.

14. When you finish this process, Workday will send an e-mail on your behalf to the interviewer(s). You may edit the **Subject** and **Body** of the message.

Note: You also have the option of not sending an email by checking the box next to **Do not send email** under **Additional Options**.

15. You may choose to upload a questionnaire or another document for the interviewers at the bottom of the page (click the **Select files** button to browse your computer and select the file or drag and drop the file into the gray area on the screen).

16. Click **Submit**.

Interviewer:

1. You will receive an email (your Suffolk County email address) that contains information regarding the upcoming scheduled interview of a candidate.

2. Once this interview has been completed, go to your inbox from the Workday Homepage.

3. Select the message "Interview Feedback from Interviews [Candidate Name] – [Job Requisition Number] [Position Name]."

4. Choose the rating for each evaluated competency. You may also explain your rating by commenting below each competency.
5. Provide the **Overall Rating** under **Overall Feedback** and write a comment detailing your reasoning behind the rating.

6. Click **Submit**.

Primary Recruiter:
You must now manage the interview feedback.

1. Once the interviewer(s) has/had completed the interview and submitted interview feedback, you will receive a notification in your inbox. From the Workday Homepage, go to your inbox.

2. Select the message "Interview Feedback from Interviews: [Candidate Name] – [Job Requisition Number] [Position Name]."

3. You will see the overall average rating given and the number of ratings submitted. Below, the interviewer's name and if their feedback has been submitted will be indicated.

4. Click **Submit**.

Primary Recruiter:
Once the interview feedback has been managed, you must now make an interview decision (whether to move the candidate on to the next recruiting stage or to decline the candidate).

1. You will receive a notification in your inbox to make an interview decision. From the Workday Homepage, go to your inbox (You may have to refresh your inbox).

2. Select the message "Interview: [Candidate Name] – [Job Requisition Number] [Position Name]."

3. You will see the button **Interview Decision**. Click this button. This will take you to the candidate's Workday page.

4. Either press **Move Forward** at the bottom of the page, or **Decline** and select a related reason to the decline. If you press **Move Forward**, the candidate moves on to another step in the recruiting process. If you wish to move forward with the candidate, you may choose to conduct a reference check, background check, and offer (in any order).

Note: You may move the candidate on to a second interview, schedule more interviews, or to another recruiting stage. If you schedule another interview or a second interview, you will follow the steps above to schedule the interview.

5. If a candidate is moved to the interview stage, Workday will automatically check to see if there is a duplicate candidate in the system. You can also manually check for duplicate candidates by searching and selecting the report **Find Duplicates for Candidates** within the Workday search. When Workday finds a potential duplicate candidate (such as a candidate with the same e-mail or same name), you must determine if this is an existing individual within Workday or a previous employee. If you determine this is a match, click the **Merge** button. This will allow the correct business process moving forward and attach the candidate to their previous Workday candidate profile.

5. Offer (or – Offer Employment Agreement)

A candidate may be moved to the Offer stage of the recruitment process after an interview has been completed. Once a candidate has been moved to the offer stage, the Primary Recruiter creates an employment agreement which must then be approved by the Manager. An Offer letter must then be created by the Primary Recruiter. Once the offer letter has been accepted by the candidate, the Primary Recruiter must move the candidate to the next stage. Follow the steps below:

Primary Recruiter:

1. Begin at the Workday Homepage and enter the job requisition number within the search bar (You may also receive a notification via a task within your Workday inbox to schedule a candidate for an interview).

2. Select the job requisition and view the candidate funnel to see the number of candidates in the ‘Offer’ stage.

3. Select the **Candidates** tab and click on the **Offer** button to the right of the candidate’s name.

Note: There are four steps to the Offer process: Start, Collective Agreement, Probation Period, Compensation, and Summary.

4. You are at the Start Page. Click on the pencil on the right side of the page, and enter the required information within the **Details** section of the page (Hire Date, Hire Reason, Location). When you have entered this information, click the checkmark button on the top right.

5. Verify the information listed within **Job Details** and **Work Hours** is correct. If the information needs to be corrected, click the pencil symbol on the right side of the section, enter the correct information, then click the checkmark on the right side of the section to save the change.

6. Click **Next**.

7. You are at the Collective Agreement page. Select the Collective Agreement for the position.

8. Click **Next**.

9. You are at the Probation Period page. Enter the correct probation period of the position by clicking the pencil symbol on the right side of the section and entering the duration of the probation period.

10. Click **Next**.

11. You are at the Compensation page. Verify the information in each section is correct. If the information needs to be corrected, click the pencil symbol on the right side of the section, enter the correct information and then click the checkmark on the right side of the section to save the change.

12. Click **Next**.

13. You are at the Summary page. Review all information listed.

14. Click **Submit**.

The Manager must approve the employment agreement:

Manager:

1. Begin at the Workday Homepage go to your Workday inbox and select the related message (Employment Agreement for Job Application: [Candidate Name] – [Job Requisition Number] – [Position Name]).”

2. Review the employment agreement.

3. Click **Approve**, **Send Back** or **Deny** at the bottom of the page. If **Send Back** is chosen, the Primary Recruiter will receive a message to correct the employment agreement. If **Deny** is chosen, the entire business process is terminated and a reason must be provided.

The HR Partner must now generate an offer letter:

HR Partner:

1. Begin at the Workday Homepage go to your Workday inbox and select the related message (Generate Document for Employment Agreement: EA Offer Letter)."
2. Review and edit the offer letter document. You may choose to view this letter in PDF form by clicking **View PDF**.
3. When you have finished drafting the letter, click **Submit**.

The candidate must now review the employment agreement. The offer letter will be sent to the candidate via the Suffolk County Career Site. The candidate will electronically sign the offer letter and submit it through this site.

Primary Recruiter:

Once the offer has been accepted, you must now move the candidate on to the next recruiting stage.

1. From the Workday Homepage, go to your inbox and select the message "Employment Agreement for Job Application: [Candidate Name] – [Job Requisition Number] [Position Name)."
2. Click **Move Forward** at the bottom of the page to move the candidate forward to another step in the recruiting process.

Note: You may select Offer Renegotiate under **Move Forward** under unique circumstances.

6. Conduct Reference Check

The process for conducting a reference check is completed using the Suffolk County Career Site.

Note: When a candidate is placed into the Reference Check phase of the recruiting process, the candidate may start a background check at the same time.

The candidate is sent a message on the Suffolk County career site that they must provide references (Minimum of two, one must be a previous supervisor) and submit them through the site. Once the candidate's reference submits their letter of reference, follow the steps below:

Primary Recruiter:

1. From the Workday Homepage, go to your inbox and select the message "Reference Check for Job Application: [Candidate Name] – [Job Requisition Number] [Position Name)."

2. Confirm that the candidate has provided two references and that one of them is listed as a supervisor.

   NOTE: If the "Contact Candidate" checkbox is checked the recruiter must contact the Candidate before clicking the **Approve** button.

3. If all looks good with the references listed, click **Approve**.

   NOTE: At this point, the referees are sent an email communication asking them to provide a reference for the candidate.

4. You will see the Referee listed (individual who is writing the letter of reference) along with the status of the reference letter.

5. Click **Submit**.

6. Go back to your Workday inbox (you may need to refresh it) and select the message "Reference Check for Job Application: [Candidate Name] – [Job Requisition Number] [Position Name)."

7. You will see the candidate's Workday page. Either press **Move Forward** at the bottom of the page, or **Decline** and select a related reason to the decline. If you press **Move Forward**, the candidate moves on to another step in the recruiting process.

If you move the candidate to the **Ready for Hire** stage:

1. From the Workday Homepage, go back to your inbox and select the message "Hire: [Employee Name] – [Position Name].

2. Verify the new employee's **Hire Date**, **Reason**, and various **Job Details**.

3. Verify the **Additional Information**, including the employee's **Work Shift**. Enter any other relevant information in the fields provided.

4. Click **Submit**.

   This has started the **Hire** business process. Please see SC-CM-TRN-037 Manage Hire Process for additional information related to the Hire Business Process.

7. Conduct Background Check

The process for conducting a background check is to be completed outside of Workday. This step may be completed after the candidate is hired.

Note: When a candidate is placed into the Background Check phase of the recruiting process, the candidate may start a reference check at the same time.

Once the background check process is completed, follow the steps below:

Primary Recruiter:

1. Begin at the Workday Homepage and enter the job requisition number within the search bar. (You may also receive a notification via a task within your Workday inbox to complete the background check [related message: Background Check for Job Application: Candidate Name – Job Requisition Number Position Name]).

2. Select the job requisition and view the candidate funnel to see the number of candidates in the ‘Background Check stage.

3. Select the **Candidates** tab and click on the **Review** button to the right of the candidate’s name within the **Background Check** step.

5. Select the **Status** of the background check. You may enter a related comment.

6. Click **Submit**.

7. Now you must move the candidate to the next recruiting phase. Go to the candidate’s Workday page from either the message in your inbox or through the job requisition. Either press **Move Forward** at the bottom of the page, or **Decline** and select a related reason to the decline. If you press **Move Forward**, the candidate moves on to another step in the recruiting process.

8. Create Prospects

Creating a prospect is a quick way to get individuals into Workday Recruiting. Often, employees meet people who are potential candidates that may be a fit for the organization.

1. From the Workday Homepage, search for "Create Prospect" within the search bar. (You may also find this task by clicking the **Recruiting** application and clicking **Create Prospect** under the Actions section).

2. Select the **Create Prospect** task from the search results.

3. You may choose **Create New Prospect** (this will allow you to add a prospect external from Suffolk County by providing their information. You may also create a prospect from a current employee by choosing **Create from Existing Workers** then choosing an employee. You may also choose **Create from Resume/CV** and add a new prospect external from Suffolk County through this document.

4. Click **Ok.**

5. Enter as much detail as possible about the prospect to help others in the hiring process determine if the candidate is a good fit for the position.

6. Click **Ok**, then click **Done** to complete the prospect entry process.

9. Find and Apply for Job (Internal Candidates)

Internal candidates may apply for internal county positions through Workday:

1. From the Workday Homepage, select the **Career** application.

2. Click **Suffolk Find Jobs** from the View section.

3. You are now viewing all available positions. On the left side, you may further filter the job results.

4. To apply for a position internally, click on one of the job postings.

5. You will see the **Job Description** including minimum qualifications, **Job Details**, **Recruiter, Hiring Manager,** and **Team Members**.

6. Click **Apply** on the top right of the page (you may also refer another individual to this job posting or create a job alert for this posting).

7. Your Workday profile information will then be used for the internal job application. If you need to edit your information within **Job History**, **Education**, **Certifications**, **Languages,** and **Skills**, click the **Go to your profile** button and modify the information.

8. You may include a resume or cover letter by clicking the **Select files** button to browse your computer for the file or by dragging the file into the gray area on the screen.

9. Click **Submit** at the bottom of the page.

Change Log

Revision Number	Date of Change	Affected Lesson	Action	Initials
1.1.1.1	09/15/2021		Log Created	RK
1.1.1.2	09/15/2021	Refer Candidate	Lesson Removed – As per Paul Martinez the County does not now use this.	RK
1.1.1.3	10/21/2021	Conduct Reference Check	Pointed out the if “Contact Candidate” checkbox is checked that the recruiter does this before hitting the approve button.	RK