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. All applications will be reviewed for minimum qualifications in the State Talent Acquisition Review step. This review is completed by State Personnel Talent Acquisition. You can view applicants prior to this review, but you cannot, and should not, take any action until this review is complete.
2. Minimally qualified candidates will be moved to the Screen/Agency review stage.
3. 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.
4. Select the **Candidate(s)** to act upon.
5. Click on the Candidate name to begin screening.
6. From the **Candidate Home Screen,** you can view information about the applicant (see the blue section on the left of the screen).
7. After screening, take Actions using the orange button at the bottom of the page. You can:
    a. Move Forward – you must complete at least one of the following steps to move on to the Offer stage.
        i. Interview
        ii. Recruiter Phone Screen

iii. Manager Application Review
iv. Manager Phone Screen
v. Reference Check
vi. Assessment

b. Decline
   (1) Screen - Candidate Withdrew

- **NOTE:** Workday will send automatic non-selection notices for options ii through v below.
   (1) Screen - Not selected for hire
   (2) Screen - Not selected for interview
   (3) Screen - Requisition Canceled
   (4) Screen - Unable to contact Candidate.

8. Click **OK**.

Phone Screen

NOTE: A self-schedule calendar can be added to this stage. See Setting Up Self-Schedule Calendars Guide for more information.

9. Move Forward – you must complete at least one of the following steps to move on to the Offer stage.
   a. Interview
   b. Recruiter Phone Screen
   c. Manager Application Review
   d. Manager Phone Screen
   e. Reference Check
   f. Assessment
10. Decline
   a. Screen - Candidate Withdrew

- **NOTE:** Workday will send automatic non-selection notices for options b through e below.
   a. Screen - Not selected for hire
   b. Screen - Not selected for interview
   c. Screen - Requisition Canceled
   d. Screen - Unable to contact Candidate.

11. Click **OK**.

Manager Application Review

See Hiring Manager Recruiting Guide

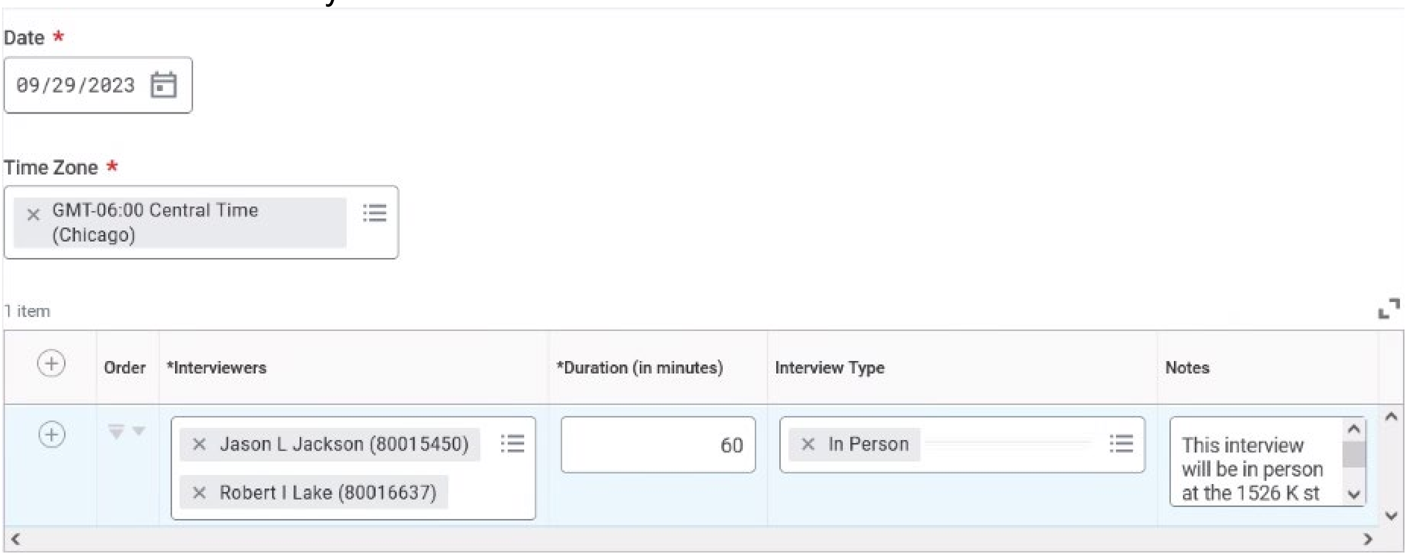
Manager Phone Screen

See Hiring Manager Recruiting Guide

Interview

12. When you click Move Forward – Interview, the next is Schedule Interview.
   a. Schedule or Skip.

b. Schedule allows you to record information about when the interview was scheduled.



13. After you pick the date and the people, the next screen is where you schedule the actual time.
14. Click Submit.

Manager Feedback

15. Interview feedback for the Manager.
16. Overall Feedback
    a. 3 – Do not recommend.
    b. 2 – Recommend but not top candidate.
    c. 1 – Recommend.

Recruiter

17. Acknowledge feedback from the Manager.
    a. Submit.

Interview Decision

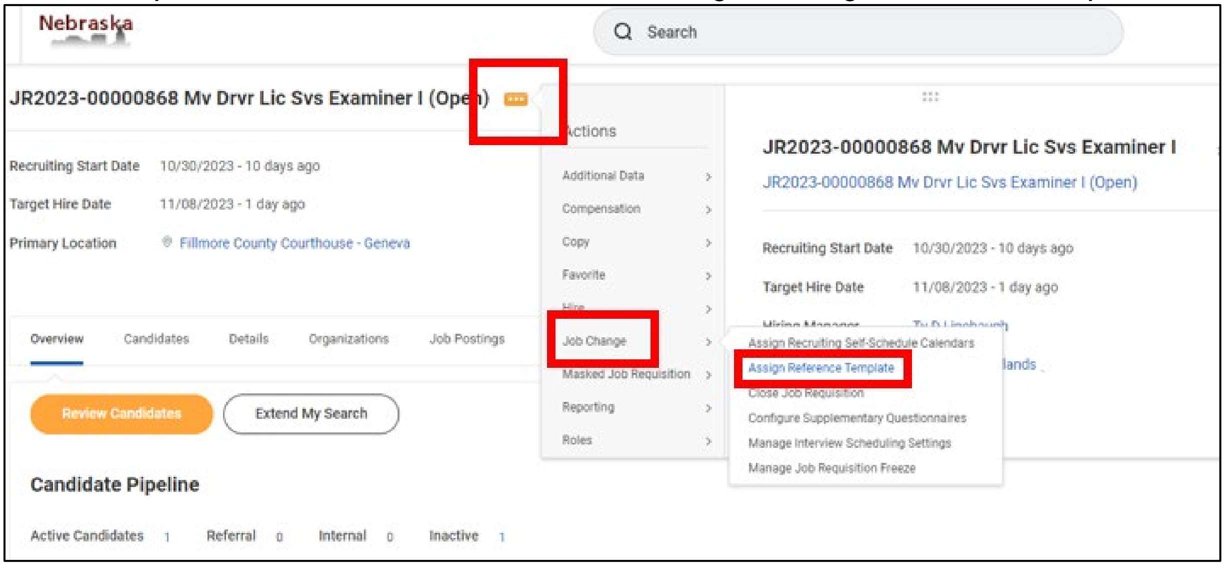
18. Move Forward
    a. Additional Interview.
    b. Assessment.
    c. Reference Check.
    d. Background Check.
    e. Offer.
19. Decline

NOTE: Workday will send automatic non-selection notices for options a 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.

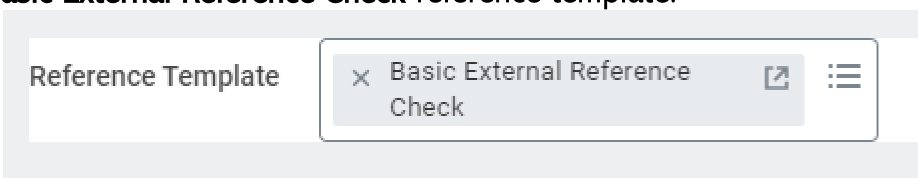
Reference Check

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

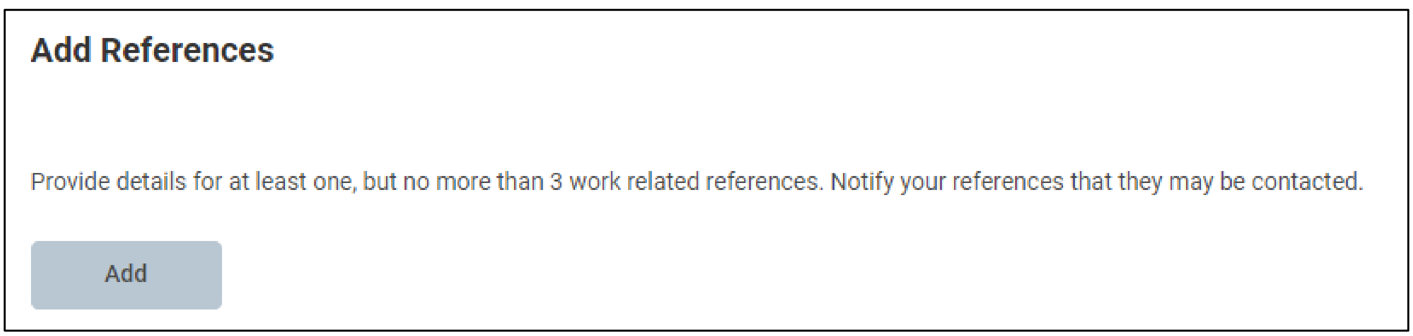
21. From the requisition, click related actions > Job Change > Assign Reference Template.



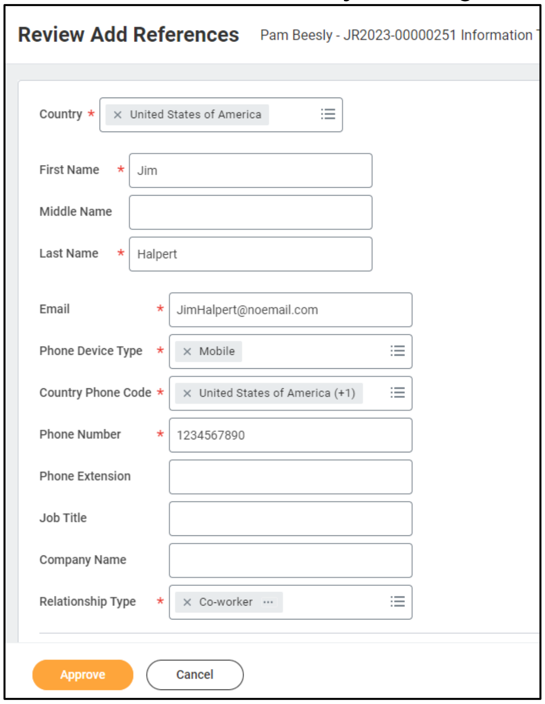
22. Select the **Basic External Reference Check** reference template.



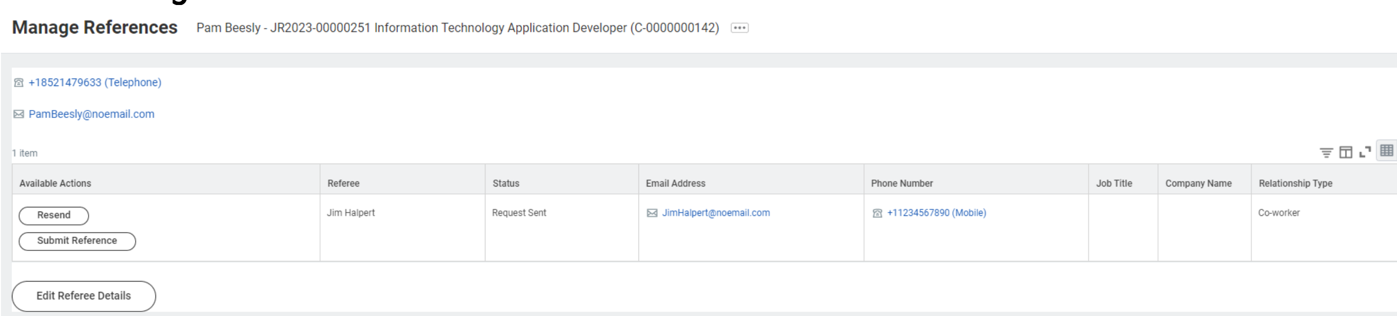
23. Click OK.
24. When the reference template is attached and a candidate is moved to this stage, the candidate will receive a task in their candidate home to **Add References**.



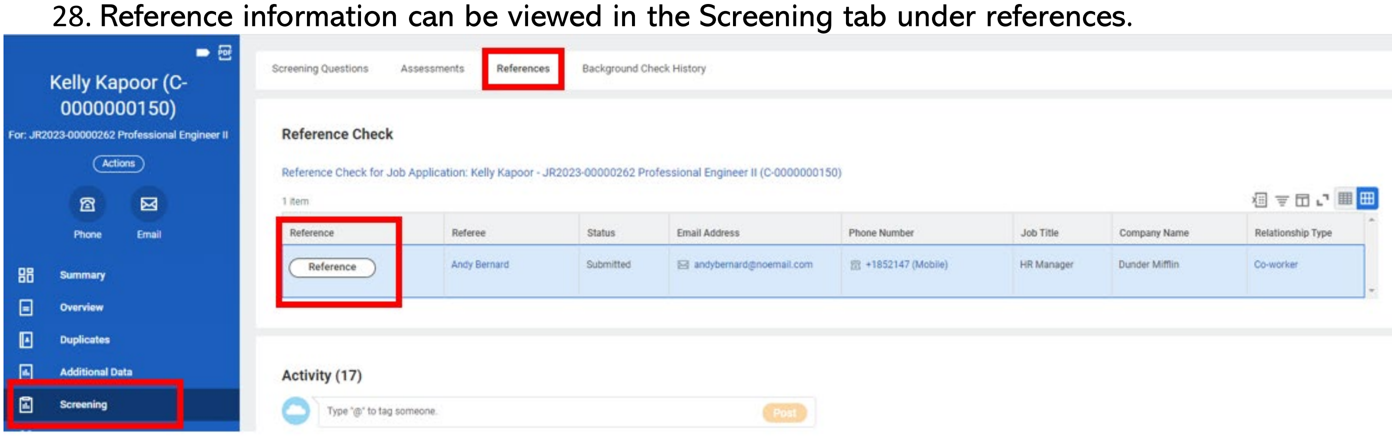
25. Once the candidate enters reference information, you will get a task to **Review Add References**.



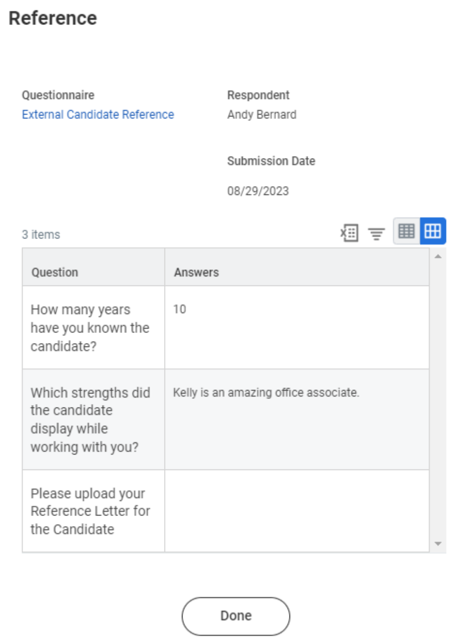
26. If acceptable, click **Approve**.
27. The reference will get a notification from Workday to complete the reference request. You have options if you need to resend, or enter the information on behalf of the reference in the **Manage References** task.



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



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

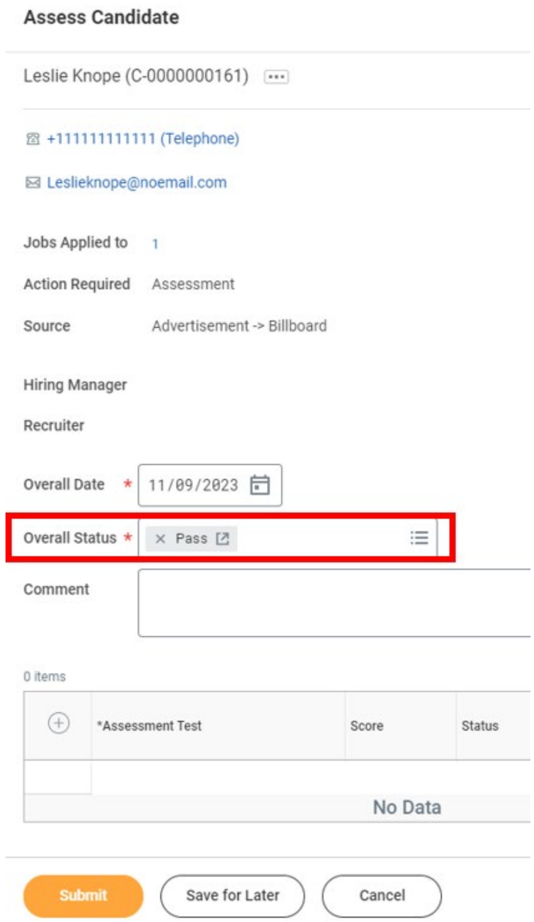


30. Click **Review Reference Check Decision**.
    b. Move Forward
        i. Interview.
        ii. Assessment.
        iii. Background Check.
        iv. Offer.
    c. Decline

NOTE: Workday will send automatic non-selection notices for options i 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

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



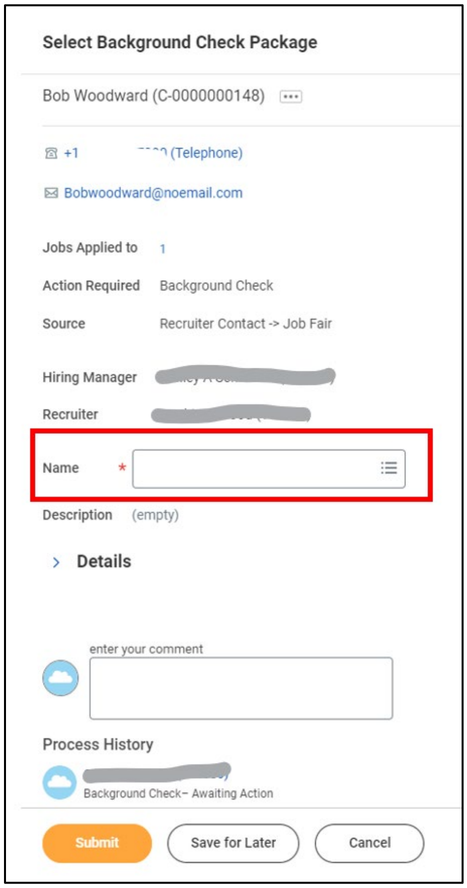
32. Click **Submit**.
33. Click **Make Assessment Decision**.
    a. Move Forward
        i. Interview.
        ii. Reference Check.
        iii. Background Check.
        iv. Offer.
    b. Decline

NOTE: Workday will send automatic non-selection notices for options i 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.

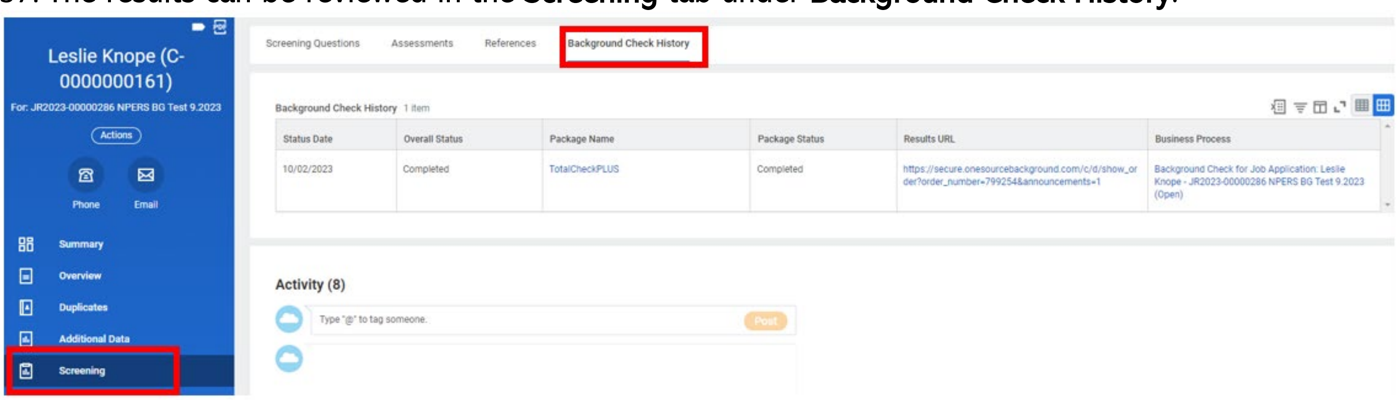
Background Check

34. Select a Background Check Package. See notes in the “Ready for Hire – Duplicate records” section!!!

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.



35. Click **Submit**.
    NOTE: the candidate will receive tasks to enter government identifiers and personal information.
36. If you have a prior agreement with OneSource and are set up to use the integration, OneSource will contact the canddiate directly with next steps to conduct the checks.
37. The results can be reviewed in the **Screening** tab under **Background Check History**.



38. Once the checks are complete you'll receive a **Review / Make Background Check Decision** Task.
    c. Move Forward
       i. Interview.
       ii. Reference Check.
       iii. Offer.

iv. Assessment.
v. Ready for Hire.

d. Decline

NOTE: Workday will send automatic non-selection notices for options i 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 to Offer

39. See Offer Guide. See notes in the "Ready for Hire – Duplicate records" section!!!

Duplicate Records Check – Merge

IMPORTANT NOTE: After you move a Candidate record to Background Check OR Offer, you MUST check for Duplicates.

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 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.**

40. PLEASE do not merge a Candidate record with a prior Worker record unless you verify that the Social Security Number for the Candidate matches the SSN on the prior Worker record.
41. 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.
    a. Click Actions > Personal Data > Edit Government IDs.
    b. Complete the following fields:
        i. Country = United States of America.
        ii. National ID Type = Social Security Number (SSN).
        iii. Type the SSN in the Current ID field, verifying that the number you enter matches with the person's ID documentation.
42. 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!)
43. 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 (see below). You will need to confirm and submit on the next page.

Type	Description
Candidate name	At least one of these combinations must be an exact match: • First letter of the **First Name** and full **Last Name** • Full **First Name** and **Last Name**
Contact information	The **Phone Number** or **Email** • must be an exact match. Only available for candidate-to-candidate matching. • 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 2 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: • All of the source's national IDs of that type must be contained within the target's IDs of the same type, or • 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.

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.