

Screen and Move Candidate(s)

Screen and Move Candidate(s)

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


Security Role

- Recruiter

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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

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- 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.

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

Order	*Interviewers	*Duration (in minutes)	Interview Type	Notes
	<ul style="list-style-type: none">Jason L Jackson (80015450)Robert I Lake (80016637)	60	<ul style="list-style-type: none">In Person	This interview will be in person at the 1526 K st

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
- 3 – Do not recommend.
 - 2 – Recommend but not top candidate.
 - 1 – Recommend.

Recruiter

17. Acknowledge feedback from the Manager.
- Submit.

Interview Decision

18. Move Forward
- Additional Interview.
 - Assessment.
 - Reference Check.
 - Background Check.
 - Offer.

19. Decline

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

- Interview - Candidate Withdrew.
- Interview – No show for interview.
- Interview - Not selected for hire.
- Interview - Requisition Canceled.
- Interview - Unable to contact Candidate.

Reference Check

20. 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.

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

The screenshot shows the Nebraska recruitment system interface. At the top, there is a search bar and the Nebraska logo. The main content area displays details for a requisition titled "JR2023-00000868 Mv Drvr Lic Svs Examiner I (Open)". Key details include: Recruiting Start Date (10/30/2023 - 10 days ago), Target Hire Date (11/08/2023 - 1 day ago), and Primary Location (Fillmore County Courthouse - Geneva). Below this, there are tabs for Overview, Candidates, Details, Organizations, and Job Postings. A "Review Candidates" button and an "Extend My Search" button are visible. A "Candidate Pipeline" section shows 1 Active Candidate, 0 Referrals, 0 Internals, and 1 Inactive. A red box highlights the "Job Change" option in the "Actions" menu, which is open. The "Assign Reference Template" option is also highlighted in red within the "Job Change" sub-menu.

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

The screenshot shows the "Reference Template" selection interface. A dropdown menu is open, displaying the selected template: "Basic External Reference Check". The interface includes a close button (X) and a menu icon (three horizontal lines).

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**.

The screenshot shows the "Add References" task interface. The title "Add References" is displayed in bold. Below the title, there is a instruction: "Provide details for at least one, but no more than 3 work related references. Notify your references that they may be contacted." At the bottom left, there is a blue "Add" button.

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

The screenshot shows a form titled "Review Add References" for Pam Beesly - JR2023-00000251 Information. The form contains the following fields:

- Country: United States of America
- First Name: Jim
- Middle Name: (empty)
- Last Name: Halpert
- Email: JimHalpert@noemail.com
- Phone Device Type: Mobile
- Country Phone Code: United States of America (+1)
- Phone Number: 1234567890
- Phone Extension: (empty)
- Job Title: (empty)
- Company Name: (empty)
- Relationship Type: Co-worker

At the bottom of the form are two buttons: "Approve" (orange) and "Cancel" (white).

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.

Manage References Pam Beesly - JR2023-00000251 Information Technology Application Developer (C-0000000142) ...

The screenshot shows the "Manage References" task for Pam Beesly - JR2023-00000251 Information Technology Application Developer (C-0000000142). It displays a table with the following data:

Available Actions	Referee	Status	Email Address	Phone Number	Job Title	Company Name	Relationship Type
Resend Submit Reference	Jim Halpert	Request Sent	JimHalpert@noemail.com	+1234567890 (Mobile)			Co-worker

Below the table is an [Edit Referee Details](#) button.

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

The screenshot shows the "Screening" tab in the candidate profile for Kelly Kapoor (C-0000000150). The "References" section is highlighted with a red box. It displays a table with the following data:

Reference	Referee	Status	Email Address	Phone Number	Job Title	Company Name	Relationship Type
Reference	Andy Bernard	Submitted	andybernard@noemail.com	+1852147 (Mobile)	HR Manager	Dunder Mifflin	Co-worker

The "Screening" tab in the left sidebar is also highlighted with a red box.

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

Reference

Questionnaire
External Candidate Reference

Respondent
Andy Bernard

Submission Date
08/29/2023

3 items

Question	Answers
How many years have you known the candidate?	10
Which strengths did the candidate display while working with you?	Kelly is an amazing office associate.
Please upload your Reference Letter for the Candidate	

Done

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.

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Assessment

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

Assess Candidate

Leslie Knope (C-0000000161) ⋮

+11111111111 (Telephone)

Leslieknope@noemail.com

Jobs Applied to 1

Action Required Assessment

Source Advertisement -> Billboard

Hiring Manager

Recruiter

Overall Date * 11/09/2023 📅

Overall Status * × Pass 📄 ⋮

Comment

0 items

	*Assessment Test	Score	Status
No Data			

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!!!

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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.

The screenshot shows a form titled "Select Background Check Package" for candidate Bob Woodward (C-0000000148). The form includes fields for contact information (phone and email), "Jobs Applied to" (1), "Action Required" (Background Check), "Source" (Recruiter Contact -> Job Fair), "Hiring Manager", and "Recruiter". A red box highlights the "Name" field, which is currently empty. Below the name field is a "Description" field (empty) and a "Details" section with a comment box. At the bottom, there is a "Process History" section showing a "Background Check - Awaiting Action" and three buttons: "Submit", "Save for Later", and "Cancel".

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 candidate directly with next steps to conduct the checks.

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

The screenshot shows the OneSource interface for candidate Leslie Knope (C-0000000161). The "Background Check History" tab is selected and highlighted with a red box. The interface includes a sidebar with navigation options: Summary, Overview, Duplicates, Additional Data, and Screening (highlighted with a red box). The main content area shows a table with one row of background check history:

Status Date	Overall Status	Package Name	Package Status	Results URL	Business Process
10/02/2023	Completed	TotalCheckPLUS	Completed	https://secure.onesourcebackground.com/c/d/show_order?order_number=799254&announcements=1	Background Check for Job Application: Leslie Knope - JR2023-00000286 NPERS BG Test 9 2023 (Open)

Below the table is an "Activity (8)" section with a text input field and a "Post" button.

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.

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- 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.

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Type	Description
Candidate name	At least one of these combinations must be an exact match: <ul style="list-style-type: none">• First letter of the First Name and full Last Name• Full First Name and Last Name
Contact information	The Phone Number or Email <ul style="list-style-type: none">• 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: <ul style="list-style-type: none">• 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.