Job Application

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What Is Workday?
Workday is a cloud-based system that The Texas A&M University System uses to manage the Human Resources, Benefits and Payroll functions for all employees.

Workday is built on three basic fundamentals:

- **Organizations**: Organizations are used to group people, resources, workers and their institution or agency. They provide management, visibility and reporting structures for resource allocation
- **Business Process**: A business process is a set of tasks used to accomplish a specific goal such as posting a position. Workday will automatically route specific steps in a workflow to those responsible for them. Certain processes may require multiple approvals within Workday and may also have additional approvals outside of Workday
- **Security Roles**: Security roles determine what you can see and do. Initiation of a business process is determined by the employee’s security role in the Workday system. The same business process may be initiated by multiple security roles
  - Security roles are not job titles. The roles provide Workday users access to appropriate data within the assigned organization structure. The roles also determine functional responsibilities, routing of actions in a business process and access to reports
  - Workday users will be assigned a security role based on the access they will need in the system. Some users may be assigned to multiple security roles depending on their duties and responsibilities

Navigating Workday

**Accessing Workday**
All A&M System employees will access Workday through Single Sign On (SSO).

**Workday Home Page**
The Workday Home page provides an icon-rich user experience much like what exists on your smart phone or tablet. These icons, called worklets, enable you to quickly access tasks that you will perform on a daily basis as well as the links to pages that will provide additional resources for you.
Worklets

A worklet is an icon found on the Home page that makes it easier to access information needed on a routine basis. Some examples of tasks that you can access through worklets include:

- View paystubs or benefits elections
- View reports
- Enter time or request time off
- Access your Inbox
- Use the Gear Icon to add/delete the worklets on your home page.

Workday Inbox

- All approvals, reviews, to-dos and other action items are accessed through your Workday Inbox
- Action items remain in your Inbox until you (or someone with the same security role) takes the action
- Access your Inbox by clicking the Inbox worklet on your Home page

Use the Gear Icon to view options and customize layout.

Job Application

Overview

This job aid outlines the process for a Recruiting Partner, Recruiting Coordinator or a Manager to move a candidate through the job application process

Prerequisites:

- The position must be unfilled by the candidate’s date of hire
- A job posting must exist which requires a job requisition
- The job can be posted internally or externally, or both

Important Information:

- The Job Application Process starts after a candidate has applied through a job posting
- This process involves up to 7 stages which will vary by System Member: Review, Screen, Interview, Offer, Background Check, Reference Check and Ready for Hire
- The process starts with the Initial Review stage and ends with the Ready for Hire stage where the candidate can be hired in Workday
- It is a dynamic process to fit each System Member’s unique hiring processes
- A candidate can be dispositioned at any stage by declining them for various reasons and will be notified automatically via email.
- A candidate can be reactivated after being dispositioned and will be notified automatically via email.
- Each System Member will have its own degree verification form (if you have submitted it).

**Steps**

**Initial Review**

The Initial Review is performed either by the Recruiting Partner or the Recruiting Coordinator. From the Workday Home page:

1. Click the **Recruiting Dashboard** worklet.

   ![](image1.png)

   The **Recruiting Dashboard** page displays.

2. Click the job requisition in the Manage Job Requisitions report.

   ![](image2.png)

   **Note:** After opening the job requisition, you can view an overview of the **Candidate Pipeline, Candidates by Active Stage and Candidates by Source** for the particular job requisition.

3. Click the **Candidates** tab to view all the candidates who have applied.
4. View the Candidate Grid, Hiring Matrix and questionnaire responses to check the application for minimum qualifications in the Initial Review stage.

5. Click the checkbox for a particular candidate and then click the Move Forward button at the bottom left corner.

**Note:**
- You can select multiple candidates and move them forward at the same time.
- You can also disposition candidates by selecting them and clicking the Decline button.

6. Click the prompt and select Screen in the Move Selected Candidates to Next Stage.

**Note:**
- The Manager can screen the candidate by viewing their skills, experience, resume, etc. and determine whether to proceed or decline.

2. Click the Move Forward button and select from the dropdown:
   - Interview
   - Reference Check

3. Click Done.

**Note:**
- The Manager can click Decline to decline the candidate due to any of the following reasons:
   - Does not meet required minimum job qualifications
   - Less relevant experience / skills than other candidates
   - Unable to meet work schedule of position
   - Unable to contact candidate
   - Candidate withdrew
   - Position not being filled

**Interview**

1. The Manager and Recruiting Coordinator receive an inbox item to Schedule Interview Team.

**Note:**
- The Manager / Recruiting Coordinator will receive the Interview inbox item when the candidate is advanced from Screen or Reference Check.

2. In the inbox item Schedule Interview Team, enter the Interviewer and Interview Date.
8. Select a rating and enter comments, as needed

a. Exceeds Expectations
b. Meets Expectations
c. Does Not Meet Expectations

9. Click Submit

10. Click Done

Note: After each interviewer rates the candidate's interview, the Manager must make the interview decision.

11. The Manager receives an inbox item to make the Interview Decision. The Manager can view the interview ratings for the candidate under the Interview tab.

12. Click Move Forward and select from the dropdown:
   - Another Interview
   - Offer
   - Background Check
   - Reference Check

Note: The Manager should not complete the decision task until they have received and reviewed the interview ratings from the interview team, if applicable.

**Note:** You can add multiple Interviewers by using the plus icon.

3. The Recruiting Partner receives a To Do as an inbox task to Review Candidate for Duplicates

4. Click the Find Duplicates for Candidate button

5. Enter the Candidate name and click OK.

Note:
- Workday shows you possible duplicates for a candidate with their names and reasons.
- You can either remove the duplicate by clicking Remove or merge the duplicate records by clicking Link.

6. Go to your Inbox and enter comments, as needed

7. Click Submit

Note:
- Each interviewer receives an inbox item to rate the candidate's interview.
- Each interviewer selects one of the following ratings:
You can click **Decline** for any of the following reasons:

- Less effective interview
- Less relevant experience / skills than other candidates
- Less relevant education than other candidates
- Unable to meet work schedule of position
- Does not meet required minimum job qualifications
- Less preferred qualifications
- No show for interview
- Candidate withdrew
- Position not being filled

**Reference Check**

1. The Recruiting Coordinator and Manager receive an Inbox item with the **Reference Check Questionnaire**

   **Note:** The Candidate must move to the **Reference Check** stage for the Inbox item to appear in the Manager / Recruiting Coordinator Inbox

2. Enter the following information:
   - Name of reference
   - Date of reference check
   - Reference check contact information

3. Click **Submit**

   **Note:**
   - You can add up to 3 references
   - The actual reference check is done outside Workday
   - The Manager or the Recruiting Coordinator performs the reference checks and moves the candidate forward through their Inbox

4. After submitting the reference check questionnaire, the Manager and Recruiting Coordinator receive an inbox task to make the Reference Check Decision. Click **Move Forward** and select from the dropdown:

- **Background Check**
- **Interview**
- **Offer**

   **Note:** You can click **Decline** for any of the following reasons:

- Reference is not favorable
- No response from references
- Candidate withdrew
- Position not being filled
- Hire not approved by HR

**Offer**

1. The Manager and Recruiting Partner / Coordinator receive an Inbox item to **Initiate Offer**

   **Note:** The Candidate must move to the **Offer Stage** for the inbox item to appear in the Manager and Recruiting Partner / Coordinator inbox

2. Click the edit icon to make edits to the offer details

   **Note:** The **Initiate Offer** step uses the Guided Editor to move through different sections for the offer

3. Enter the following information:
   - **Hire Date:** Pre-populated based on Target Hire Date from the job requisition. Edit to proposed hire date for candidate
   - **Location:** Defaulted from the job requisition
   - **Document Language:** English
   - **Business Title:** Defaulted from the job requisition

4. Click **Next**

5. In the **Compensation** section, complete /
modify the following information:

- **Salary / Hourly**: Depending if it is a Salary or Hourly position
- **Frequency**: Monthly for salary positions and hourly for non-exempt positions
- **Effective Date**: Same as Hire Date
- **Allowances**: If applicable

6. Click **Next**

7. In the **One-Time Payment** section, complete / modify the following information:
   - **Effective Date**: Will default from the Hire Date on the Start page - will need to be edited if different than hire date
   - **Employee Visibility Date**: The date that will be visible to the employee in Workday
   - **Reason**

8. Under Payment, click **Add**

**Note**: You will only be able to add a payment amount after adding a Payment Plan

9. In the **Payment** section, complete / modify the following information:
   - **One-Time Payment Plan**
   - **Amount**
   - **Currency** (USD)
   - **Additional Information**: Add additional comments, as needed
   - **Worktags**: Enter the appropriate Cost Center, if applicable

10. The **Send to Payroll** checkbox should be selected by default

11. Click **Next** to review all information entered

12. Click **Submit**

**Note**:

- The Initiator receives an Inbox To Do item to obtain appropriate compensation approvals outside of Workday (if applicable). This is for System Members who require additional approvals beyond those configured in Workday
- Click **Submit** after obtaining compensation approvals (if applicable)
- The Recruiting Partner must click **Submit** in the Inbox. This is to route to the HR for review and obtain appropriate approvals

13. The Recruiting Partner receives a Consolidated Approval inbox task to review proposed compensation for offer. They have the ability to approve, decline or send back for edits

14. The Manager and Recruiting Partner / Coordinator receive an Inbox item to Generate the Offer Document
**Note:**

- You can edit the verbiage of the offer letter in the Document field. If you make edits, you must first save the edits before generating the PDF if you want the edits to be visible in the PDF. You can view the offer letter by clicking the View PDF button.

- The offer letters for each System Member are different with their own branding. You will see the offer letter template for your own System Member.

- If you do not want to use the Generate Document feature in Workday, you can skip the Generate Document step and it will not send the letter to the candidate. If the letter is generated outside of Workday, the Recruiting Partner or Recruiting Coordinator can upload the letter (generated outside of Workday) to the candidate profile for documentation purposes.

15. Click Submit

**Submit Note:**

- The candidate receives the offer letter. An internal candidate will receive their offer letter in their Workday Inbox while external candidates will receive it on their Candidate Home account on the external career site.

- The Manager and Recruiting Partner / Coordinator receive an Inbox item asking whether the candidate accepted the offer.

16. Select Yes or No and click Submit.

17. Click Move Forward and select from the dropdown:

- Reference Check
- Background Check
- Renegotiate Offer

**Note:** You can click Decline for any of the following reasons:

- Declined Offer - Compensation is insufficient
- Declined Offer - Unwilling to relocate
- Declined Offer - Unable to meet work schedule of position
- Declined Offer - Other reason or no reason provided
- Candidate withdrew
- Position not being filled
- Hire not approved by HR

**Background Check**

1. The Recruiting Partner receives an Inbox item to select the Background Check Package.

**Note:** The Candidate must move to the Background Check stage for the Inbox item to appear in the Recruiting Partner Inbox.

2. Select Background Check Package from the drop down values in the Name field

**Note:** Select the background package which corresponds to your System member's background check process.

3. Click Submit.

4. During the background check review, enter the following information:

- Status Date
- Status
  - Pass
  - Did Not Pass
  - Not Applicable
- Enter any comments, as needed.

**Background Check**

- Status Date: 06/22/2017
- Status
- Comment
5. Click Submit

6. Once submitted, inbox task is generated to make Background Check Decision. Click Move Forward and select from the dropdown:
   - Another Background Check
   - Reference Check
   - Offer
   - Ready to Hire

**Note:** You can click Decline for any of the following reasons:
   - Unacceptable criminal background check
   - Unacceptable credentials check
   - Candidate withdrew
   - Position not being filled
   - Hire not approved by HR

**Ready for Hire**

1. The Recruiting Partner receives an inbox item to complete Hiring Checklist

**Note:**
   - This is the last stage of the Job Application process
   - The Candidate must move to the Ready for Hire stage for the Inbox item to appear in the Recruiting Partner Inbox
   - The Hiring Checklist consists of questions around the usage of Hiring Matrix, review of hiring documents, confirming minimum qualifications, reference / education verification, etc. This is used for compliance purposes

2. Complete the questions in the Hiring Checklist

3. Click Submit

**Note:** If the Recruiting Partner responds with a “Yes” on the questionnaire that the degree verification is needed, the degree verification form goes to the Candidate Home for the candidate to complete. This is only applicable to System Members who provided an authorization form

4. The Recruiting Partner receives a To Do item to confirm if the candidate is eligible to hire

**Note:**
   - The Recruiting Partner confirms that candidate has met all minimum required qualifications

5. The Candidate changes personal information and changes Government IDs in Workday. This step does not happen until the previous To Do is complete and submitted. The internal candidate will receive the task to their Workday inbox while the external candidate will receive the task to their Candidate Home

6. Once the candidate completes their tasks, the Recruiting Partner receives the Ready for Hire Checklist in their inbox

7. Click Submit

**Note:**
   - The job posting will unpost automatically, if it has not been manually unposted prior to completing Ready for Hire step
Once the Ready for Hire step is completed by the Recruiting Partner, the candidate is ready to be hired in Workday using the steps outlined in the Hire Job Aid.

At any point in the Job Application Process the Recruiting Partner can click the Recruiting Dashboard worklet to view their open job requisitions within the Manage Job Requisitions report.

Within the Job Requisition, the Recruiting Partner, Recruiting Coordinator and Manager can see all the candidates, the stage they are in, awaiting actions for each of them and other application related information under the Candidates tab (visibility will be based on the security roles).

You can manage candidates for a particular job requisition from the Candidates tab of the requisition.

This completes the Job Application process.