HR Training for Human Resources Partners

Workday Recruiting and Applicant Tracking

uchicago

Expectations

Silence cell phones, and minimize usage during training.

Refrain from engaging in disruptive side conversations.

Actively participate and share your experiences.

Check your e-mail during breaks only.

Table of Contents

Note: This training for Workday Recruiting and Applicant Tracking, and the content and changes presented, does NOT apply to Student Employees, Post Doc and Academics.

Course Objectives

Upon completion of this course, you will be able to:

- Identify University policies relating to the job requisition and applicant tracking process
- Compare and contrast the roles and responsibilities between the different individuals and groups involved in the recruiting and applicant tracking process
- Understand the functionality and business processes within the Workday Recruiting module
- Determine when a job requisition requires additional outreach
- Perform the job posting, editing and exception process in Workday Recruiting
- Complete the process to request assistance from the SSO with reference checks
- Understand the responsibilities and process of how background checks will be conducted

Transition from UChicago Jobs to Workday Recruiting

December 18, 2017

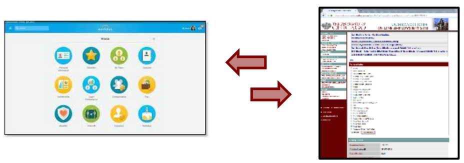
- Workday Recruiting goes live! “Weekly Workday Recruit Camp” *(December 21 – January 25)*
- Begin creating job requisitions in Workday
- Begin requesting posting exceptions in Workday via the Create/Edit Position business process
- Background Check initiation by Shared Services via GIS
- Applicant review through Workday

April 22, 2018

- Contract with UChicago Jobs ends
- All staff positions
- All outstanding and open requisitions must move to Workday
- No mass data conversion from UChicago Jobs to Workday
- Solution to access UChicago Jobs data for ongoing access to job descriptions and requisitions

Current Pain Points in the Recruiting Process

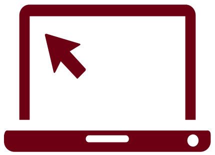
Recruiting and applicant tracking tasks managed between UChicago Jobs and Workday have produced duplicate processes, greater data entry requirements and reduced ability to track an applicant between systems



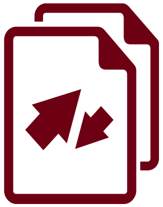
Double data entry, manual checks and multiple approvals due to lack of integration between WD and UC Jobs

Posting exception submission and approval process performed manually with central HR

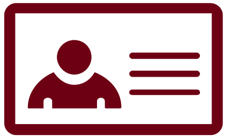
Manual maintenance of end user accounts



Manual personalization of offer letter templates



Inability to parse text from uploaded resume



Manual review of applicant credentials and all supporting documents

Welcoming Workday Recruitment

End-to-end talent acquisition application

Enable transparency and collaboration across the entire hiring team

Seamless integration of job requisition creation, management, and fulfillment

Part of the current, single Workday system

Technology

- ✓ Eliminate duplicate data entry for staff Recruiting in two systems
- ✓ Reduction of data entry
- ✓ Increased applicant search functionality

Resource

- ✓ Standardized job description template
- ✓ Streamline process of posting exception
- ✓ Sourced information to identify positions that require underutilization

Support

- ✓ SSO support for external job board posting (via a ServiceNow Form)*
- ✓ SSO assistance with reference checks (via a ServiceNow Form)*
- ✓ SSO initiates background checks for all new UChicago Employees
- ✓ SSO manages clerical testing (via a ServiceNow Form)*

**optional service, per request*

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Workday Recruiting Training for Human Resources Partners

Lesson 1: Create Job Requisition

Policies

Important Equal Employment Opportunity policies

Policy 201

Expresses the University's continuing practice of nondiscrimination in employment.

KEY TAKEAWAYS

1. The University of Chicago provides equal employment opportunities to all employees, applicants, and job seekers, and is committed to making decisions using reasonable standards based on each individual's qualifications as they relate to a particular employment action (e.g., hiring, training, promotions).
2. This Policy applies to all terms, conditions, and privileges of employment including: recruitment, hiring, probationary period, training and development opportunities, job assignment, supervision, promotion or transfer, compensation, benefits, layoff and recall, termination, and retirement.
3. The Vice President for Operations & Chief Financial Officer (VP & CFO) is responsible for ensuring that University policies (including this Policy) regarding the fair and equitable treatment of staff employees are implemented.
4. The Affirmative Action Officer coordinates the University's compliance with and interpretation of this Policy and advises employees, supervisors, and managers about the policy as needed.

Policies

Important Talent Acquisition Policies

Policy 202

Describes the University's policies for staff talent acquisition throughout the four core phases of workforce planning, strategic sourcing, talent pool assessment, and successful selection.

KEY TAKEAWAYS

1. All new and vacant benefits eligible staff positions must be posted. Temporary jobs are not required to be posted, but can be to increase the applicant pool
2. Required to post a minimum of 7 calendar days and a maximum of six months, both internally and externally.
3. For Posting Exceptions, HRP must submit a justification rationale in Workday as part of the create position process. This will route to the Associate Vice President of Human Resources (AVP) and The Office of Equal Opportunity Programs for consideration. Only the AVP and The Office of Equal Opportunity Programs have the exclusive authority to review and grant posting exceptions.
4. When creating the job requisition, HRP's are required to determine if a position-requires extra outreach based on the Affirmative Action Plan information located in Workday. If a job requisition is determined to require extra outreach, the HRP will develop a plan and provide documentation alongside the job requisition in Workday.

Create Job Requisition – Current Steps

Steps completed in both UChicago Jobs and Workday

1 Confirm Funding

2 Create Job Requisition in UChicago Jobs

4 Post Position in UChicago Jobs

2 Create Position in Workday

3 Obtain Workday Approvals

4 Review Position in Workday

5 Receive Notification

6 Apply to Position in UChicago Jobs

Applicant

Human Resources Partner

Shared Services Office

Center of Expertise

Create Job Requisition – Workday Recruiting Steps

Entire process including checks and approvals completed in Workday Recruiting

1. Create or Update Position
2. Obtain Workday Approvals
3. Create Job Requisition
4. Review and Post Job Posting
5. Primary Recruiter Receives Notification
6. Apply to Position in Workday

Applicant

Human Resources Partner

Shared Services Office

Center of Expertise

Roles and Responsibilities

Create Job Requisition

Local Units – Hiring Manager

Human Resources Partner

Shared Services Office

Center of Expertise

Roles and Responsibilities – Create Job Requisition

Local Unit – Hiring Manager

- Determine workforce need in advance
- Work with HRP to create/review job description, start dates, determine external posting needs
- Work with HRP to recruit and select candidates.

Roles and Responsibilities – Create Job Requisition

Human Resources Partner

- Manage and assess workforce needs
- Works with Hiring Manager and Budget Partner to gather required information to initiate the “Create Position” Business Process and develop Job Description
- Initiate the Create “Job Requisition” in Workday
- Assign the roles of the Primary Recruiter and Recruiting Screener
- Ensure the position does or does not require extra outreach to meet AA/EEO Outreach Requirements
- Conduct extra outreach for underutilized positions per Affirmative Action requirements if notified during the creating the Job Requisition process.
- Assist with Recruiting and selection process

Roles and Responsibilities – Create Job Requisition

Shared Services Office

- Supports units by ensuring policies are being followed by reviewing and approving the job requisition
- Review/approve job requisition posting process. Oversee standardization of the job description and ensure that the requisition meets the requirements for compliance
- Conduct reference checks, if requested
- Initiate and review background checks

Roles and Responsibilities – Create Job Requisition

Center of Expertise

Talent Acquisition

Attract and engage a high performing, diverse workforce; partner with HR Community & People Managers to enable talent delivery and optimize talent investment

Budget Office

Confirm funding for position is budgeted in Delphi and approve position in Workday if funds are available

Human Resources and Office of Equal Opportunities

Review and approve posting exceptions.

Four Processes Enhancements

Job Description Template

Extra Outreach for Underutilized Position

External Job Board

Posting Exception Submission and Approval Process

Job Description

Job Description

Job Summary:

- The Associate Project Manager manages his or her own small, short-term, low-risk, potentially low - to medium-impact projects or portions of larger, more complex projects owned by more senior Project Managers.

Responsibilities and Percentages of Time:

- Perform project monitoring, control and governance activities (e.g., manage project scope and scope change requests, track projects against milestones, monitor projects for continuous improvement, develop status reports and project communication plan.) 30%
- Develop and present project communications (e.g., key messages and change implementation story) and media to support the project and established transition plan, with guidance from project adviser or business sponsor. 30%
- Determine and establish the project approach (e.g., objectives, schedule, resources, roles and responsibilities, budget/CBA) and assist in change implementation. 20%
- Analyze and understand project trends/themes (around activities, budgets, and resources); make recommendations for adjustments as necessary and identify and develop contingency plans to mitigate and address risks. 10%
- Coordinate/guide project activities among different internal teams. 10%

Competencies:

- Interactive Communication
- Teamwork
- Project Management
- Analytical Thinking

Additional Job Description

Additional Job Description

Education, Experience and Certifications:

Education:

- Bachelor's degree or equivalent

Experience

- Typically has 2 years of project management and business analysis experience
- Experience writing business requirements and managing projects to multi-month timelines
- Exposure to organization change and communication
- Preferred: Experience executing strategic business plans; experience with process improvement

Licenses and Certifications

- Project management certification (e.g., PMI, PMP) desirable
- Quality management certification (e.g., Six Sigma, Juran, Deming) desirable

Technical Knowledge or Skills:

- Knowledge of Microsoft projects, including MS Project, Excel, Word, Access, and PowerPoint
- General understanding of FTI projects, systems, functions, (and Business Units), marketing, and/or service policies and procedures preferred.

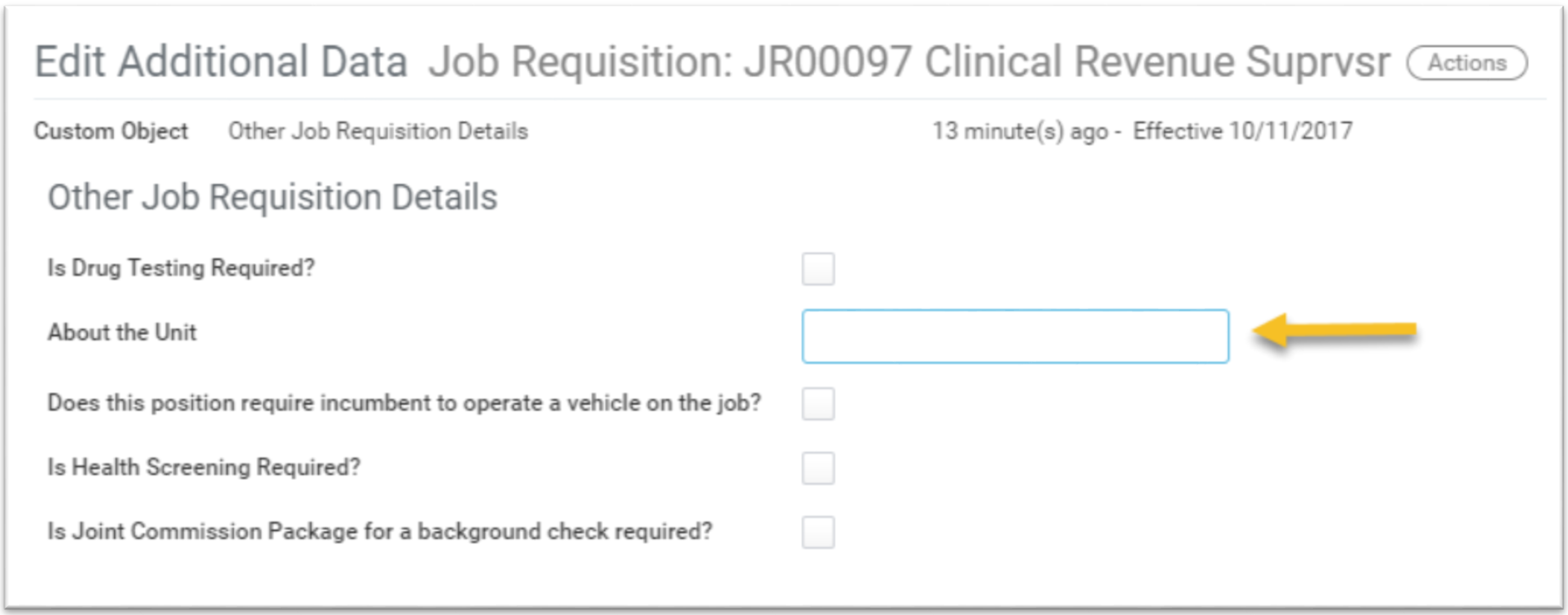
Working Conditions and Physical Requirements: (if applicable)

- Working condition and physical requirements are no longer required for office roles
- Add any working condition or physical requirements that are applicable based on the roll in bulleted format.

Required Documents:

Resume, Cover Letter, and Writing Sample

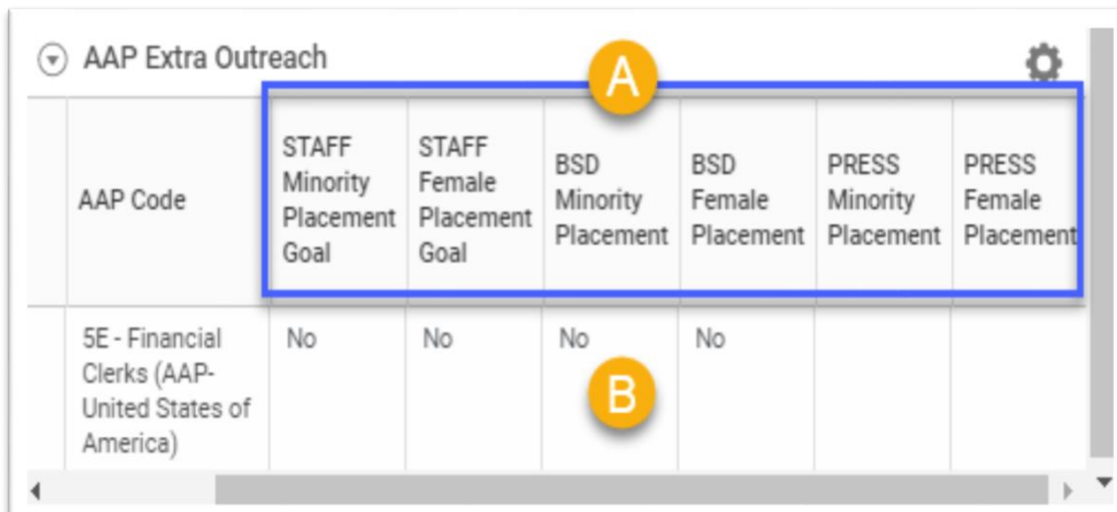
Unit Description



Extra Outreach Chart

Determine if the position requires Extra Outreach for Underutilized Position

- The AAP Extra Outreach chart will help determine if a position requires extra outreach
- Look for the respective unit columns (BSD, Press, Staff (all other units)
- If that row states “Yes”, then the position will require extra outreach in the population listed (minority or female)



Extra Outreach Template
Complete an extra outreach plan

Extra Outreach Plan Framework

Requisition Number:	**Position Title:**	**Budget:**
Job Profile:	**HR Partner:**	**Underutilization:**
Unit or Division:	**Hiring Manager:**	**Date Posted:**

Activity	Timeline	Expected Outcome	Measure of Effectiveness
List the tasks that will be performed including outreach methods, tools and measures of success.	Specify the timeline for completing each activity. Outreach plan should be developed when creating the job requisition in Workday.	Specify what you hope to achieve through your outreach activities.	What indicators will you use to measure the effectiveness of your efforts?
1.			
2.			

A plan must be uploaded into Workday.

External Job Board Posting

Requesting with a ServiceNow Form

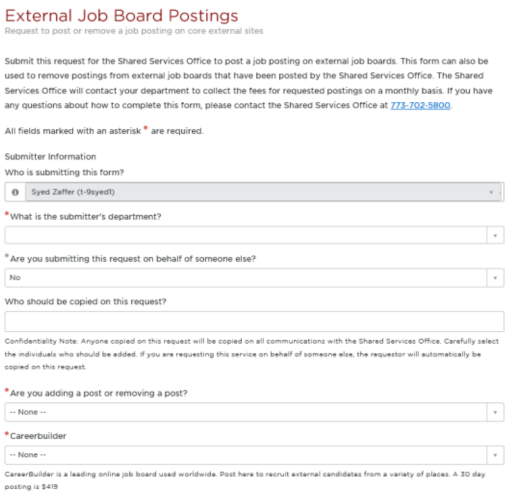
Purpose: HR Partners can submit requests to the Shared Services Office to post positions on external sites, including CareerBuilder, HigherEd Jobs, Idealist and LinkedIn.

Process:

Submit form including Requisition Number →	Search for Requisition Number in Workday →	Post position details on requested job boards →	Close ticket and send postings confirmation to HRP
HRP	**SSO**	**SSO**	**SSO**

Key Considerations:

- Each external posting option has an associated fee which will be charged and collected from units on a monthly basis
- Include FAS Account and Subaccount information


External Job Board Postings
Request to post or remove a job posting on core external sites

Submit this request for the Shared Services Office to post a job posting on external job boards. This form can also be used to remove postings from external job boards that have been posted by the Shared Services Office. The Shared Services Office will contact your department to collect the fees for requested postings on a monthly basis. If you have any questions about how to complete this form, please contact the Shared Services Office at 773-702-5800.

All fields marked with an asterisk * are required.

Submitter Information

Who is submitting this form?

Syed Zaffer (t-9syed1)

*What is the submitter's department?

*Are you submitting this request on behalf of someone else?

No

Who should be copied on this request?

Confidentiality Note: Anyone copied on this request will be copied on all communications with the Shared Services Office. Carefully select the individuals who should be added. If you are requesting this service on behalf of someone else, the requestor will automatically be copied on this request.

*Are you adding a post or removing a post?

-- None --

*Careerbuilder

-- None --

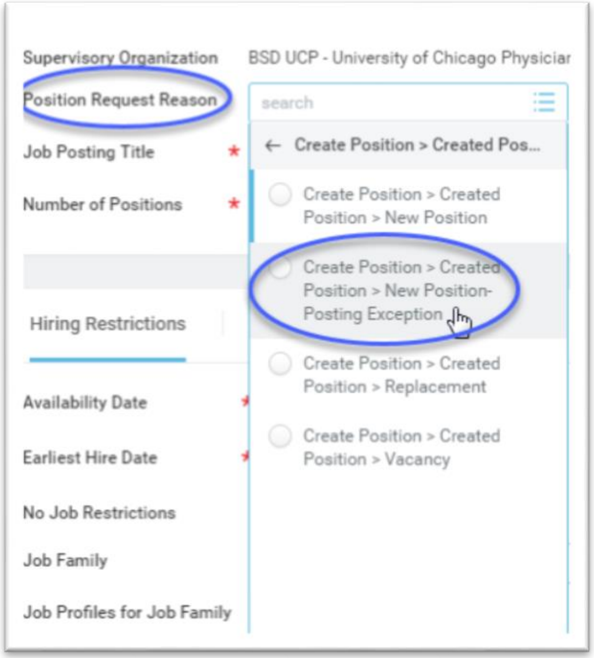
CareerBuilder is a leading online job board used worldwide. Post here to recruit external candidates from a variety of places. A 30 day posting is $419

[External Postings form](#)

Posting Exception Process

Under special circumstances, an HRP can request a posting exception on behalf of the hiring unit

- HRP may submit a justification rationale in Workday as part of the Create Position business process
- Locate the **Comment Box,** at the bottom of the page and type in justification reason for the posting exception.
- Once the **Create Position** is submitted, it will route to the AVP of Human Resources and The Office of Equal Opportunity Programs for approval, each will need to approve the Workday task, to move forward



- Compensation increase
- Job profile change
- Key responsibility change with corresponding percent

Knowledge Check

Determining Extra Outreach

Question:

How will an HRP be informed that a position requires extra outreach?

a) *Receive an email from Talent Acquisition*

b) *Through the Create Position BP, the HRP will receive notification*

c) *When the Create Job Requisition is initiated*

d) *Receive an email from Shared Service Office*

e) *Receive notification through Workday Inbox*

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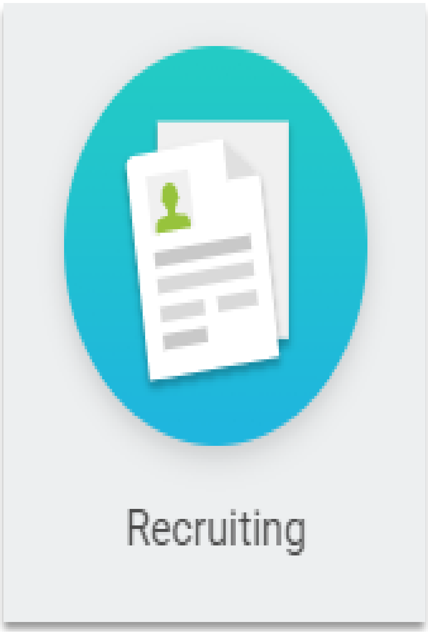
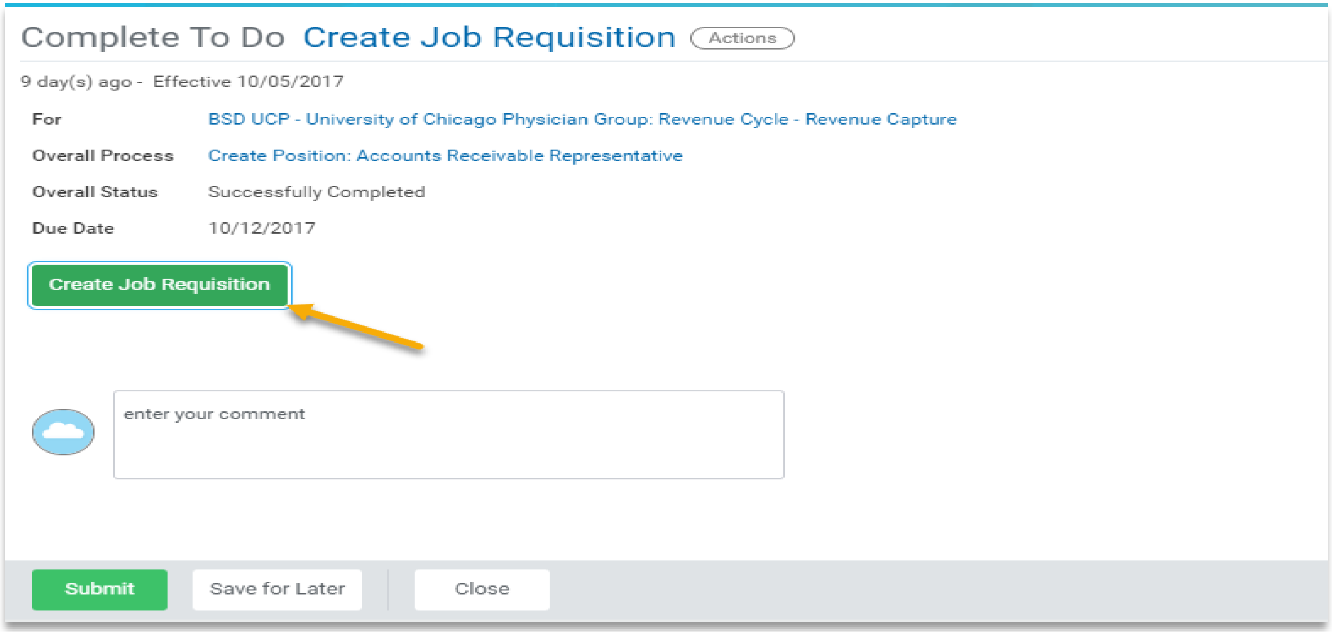
Workday Recruiting Vocabulary

Job Requisition		
Workday Term	**Workday Definition**	**UChicago Jobs Term**
Questionnaire	Standard and required questions governed by legal counsel for all applicants to respond.	**Legal Question**
Recruiting Worklet	An icon accessible from the Workday Dashboard, where HRPs can access and create a job requisition in Workday.	**No equivalent**
Hiring Worklet	An icon accessible from the Workday Dashboard, where HRPs create the position in Workday.	**No equivalent**
Activity Stream	A list of all comments contained in a business process, viewable by anyone who has access to the job requisition.	**Notes Section**
Job Description	Field in Workday where a full job description will be inputted; inclusive of Unit Job Summary, Responsibilities, Percentage of Time and Competencies.	**Unit Job Summary; Responsibilities and Percentage of Time; Competencies**
Additional Job Descriptions	Field in Workday where the Education, Technical Knowledge or Skills, Working Conditions (if directly applicable for the position), and Required Application Documents will be inputted.	**Education, Technical Knowledge or Skills, Work Condition (if applicable), Required Documents**
Job Posting Title	A name that describes a person's job in an organization	**Departmental Job Title**
Job Family	A grouping of similar job profiles.	**Job Family**
Time Type (Full-time; Part-time)	A field or drop down where the user selects the option of either full time or part time.	**Work Schedule**
Job Profile	A job profile is assigned to any position that exists in Workday. It defines key features such as pay rate type, FLSA status, federal compliance classifications (EEO, AACP, IPEDS), work shift	**Job Code**
Scheduled Weekly Hours	The number of hours that the employee will work per week	**Hours Per Week**
Primary Location	Location where the employee will perform his/her assigned duties	**Work Location**

Workday Recruiting Demonstration





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Course Wrap-Up

POLICIES

- Policy 201 – EEO
- Policy 202 – Talent Acquisition

JOB AIDS

- Extra Outreach Efforts; Extra Outreach Plan Framework
- Workday vs UChicago Jobs Translation
- Job Description Template

QUICK REFERENCE GUIDES (QRG)

- Create Position and Edit Position Restrictions
- How to Create a Job Requisition

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Workday Recruiting Training for Human Resources Partners

Lesson 2: Applicant Tracking

Policies

Important Reference Check policies

Policy 204

Provides guidelines for conducting background and reference checks on staff new hires and internal applicants.

KEY TAKEAWAYS

1. Reference checks should be completed prior to conveying an offer to an applicant.
2. The HRP and/or hiring manager should conduct reference checks by contacting at least two (2) professional references. Reference checks can also be completed by requesting the assistance of SSO.
3. For an internal applicant, the hiring manager should take special care to ensure the application is confidential. As a courtesy, the hiring manager should only contact the employee's current unit when the employee is considered a finalist and/or references are to be checked, and the hiring manager has confirmed that the employee has notified his/her supervisor.
4. Information provided by references and gathered during the reference check must be retained, along with other application materials, for a minimum of seven years for the applicant who is hired and for three years for all other applicants.

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Policies

Important Background Check policies

Policy 204

Provides guidelines for conducting background and reference checks on staff new hires and internal applicants.

KEY TAKEAWAYS

1. The University requires newly hired and converted staff employees (benefits eligible, non-benefits eligible and temporary) to undergo a background check. Minors are excluded from background check requirements, though there may be other hiring requirements specific to minors.
2. The background check is to be completed only after a conditional offer of employment has been made and accepted by the applicant. A valid background check report will be conducted prior to the hire or conversion date. Background checks must include the following:
   a. Criminal history, which includes a registered sex offender check;
   b. Academic credential verification (transferring academic employees may be excluded).
3. A background check must be completed and a satisfactory report received before a new hire may start work. In exceptional circumstances, the Associate Vice President (or designee) or the department/unit head may authorize an applicant to begin work before a satisfactory report has been received by submitting a letter of authorization on department letterhead to the Shared Services Office (SSO).

Risk Management

Vehicle Use Acknowledgement Form Reminder

Purpose

The signed consent form:

- Authorizes Risk Management to run Motor Vehicle Record (MVR) reviews on employee or potential hire who drives a University owned vehicle or whose job description includes driving as an essential function of their job.
- Allows The University's insurance company to run an MVR as part of the renewal process.
- Is a sworn statement that employees or potential hires report incidents that occur while driving including accidents, tickets and violations that might affect their ability to drive.
- Allows the University to run random MVR reviews for employees without further permission.
- Advises employees and potential hires that failure to report may result in disciplinary action.

The signed form must be retained so that the University has proof of the employee’s permission in the event any of the above actions are in dispute.

Risk Management

Illinois Abused and Neglected Child Reporting Act

Requires reporting of suspected child abuse or neglect to the Illinois Department of Children and Family Services (DCFS).

Mandated reporters are required to acknowledge this responsibility.

All University personnel now are mandated reporters, including all faculty, academic appointees, postdoctoral researchers, staff, student employees, and volunteers while working in their official capacity as a University employee.

What do I do if I suspect child abuse?

- **If a minor is in immediate danger call 911**
- **If no immediate danger, call DCFS Child Abuse Hotline 1.800.25.ABUSE**
- **Inform head of academic unit or immediate supervisor**
- **Inform Youth Program Coordinator: kenyatta@uchicago.edu**

The **Policy on the Safety of Children in University Programs** sets screening, training, and conduct requirements for those individuals who are involved with University programs that serve children.

Information regarding your mandated reporter status, reporting requirements, and to find further information about the **Policy on the Safety of Children in University Programs,** visit minorsoncampus.uchicago.edu.

Our first priority in all University youth programs is care and safety. The University of Chicago makes active and effective efforts to prevent child abuse, verbal, physical, emotional or sexual.

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Roles and Responsibilities
Applicant Tracking

Applicant

Local Units

Shared Services Office

Center of Expertise

Roles and Responsibilities – Applicant Tracking

Applicant

Internal Applicant

- Maintain career profile in Workday, which includes all work experience, training, education, certifications, etc.
- Search and apply for position for which they qualify
- Track the application status via careers worklet

External Applicant

- Apply for position for which they qualify and ensure they follow the application instructions thoroughly
- Track application status via the applicant portal

Roles and Responsibilities – Applicant Tracking

Local Units

HRP

- Point of contact for the Primary Recruiter to address questions
- View access of job requisitions and candidates within supervisory organization
- Support the Change Job/Hire process

Primary Recruiter

- Manage the recruiting pool
- Take action on all processes within Workday regarding the applicant stages
- Multiple Primary Recruiters may be assigned, including HRPs

Recruiting Screener

- Review the entire applicant pool and view actions taken on each applicant
- View Access Only
- Provide feedback on the applicant pool

Roles and Responsibilities – Applicant Tracking

Local Units

Hiring Manager

- May assist in the selection of the candidates to interview and to hire
- Review application materials
- Conduct interviews based on the department's recruiting timeline

Interview Committee

- Interview candidates
- Provides feedback via the rating system in Workday
- Committee must consist of at least one person, which can be hiring manger

Roles and Responsibilities – Applicant Tracking

Shared Services Office and Center of Expertise

Shared Services Office

- Supports the hiring process by initiating all back ground checks after the offer has been accepted and documents process via Workday
- Conduct Reference Checks, as requested
- Schedule and administer assessment testing and report results to requesting HRP.
- Address applicant inquires.

Center of Expertise

- Provide full applicant cycle or single-service offerings, including: Workforce Planning, Strategic Sourcing, Talent Pool Assessment & Successful Selection

Knowledge Check

Roles

Question:

What is the difference between the Primary Recruiter and Recruiting Screener?

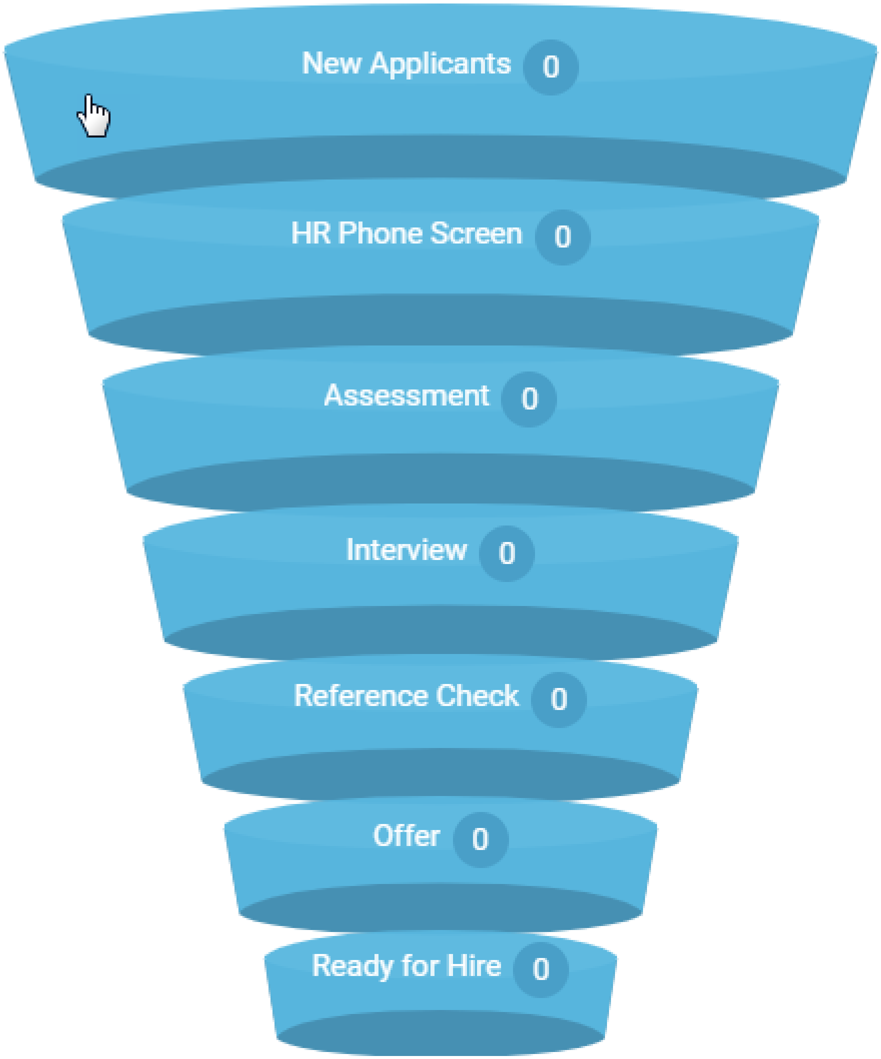
a) *Primary Recruiter has viewing capabilities in the applicant pool and Recruiting Screener takes action.*

b) *Primary Recruiter is always the HRP and the Recruiting Screener is always the Hiring Manager*

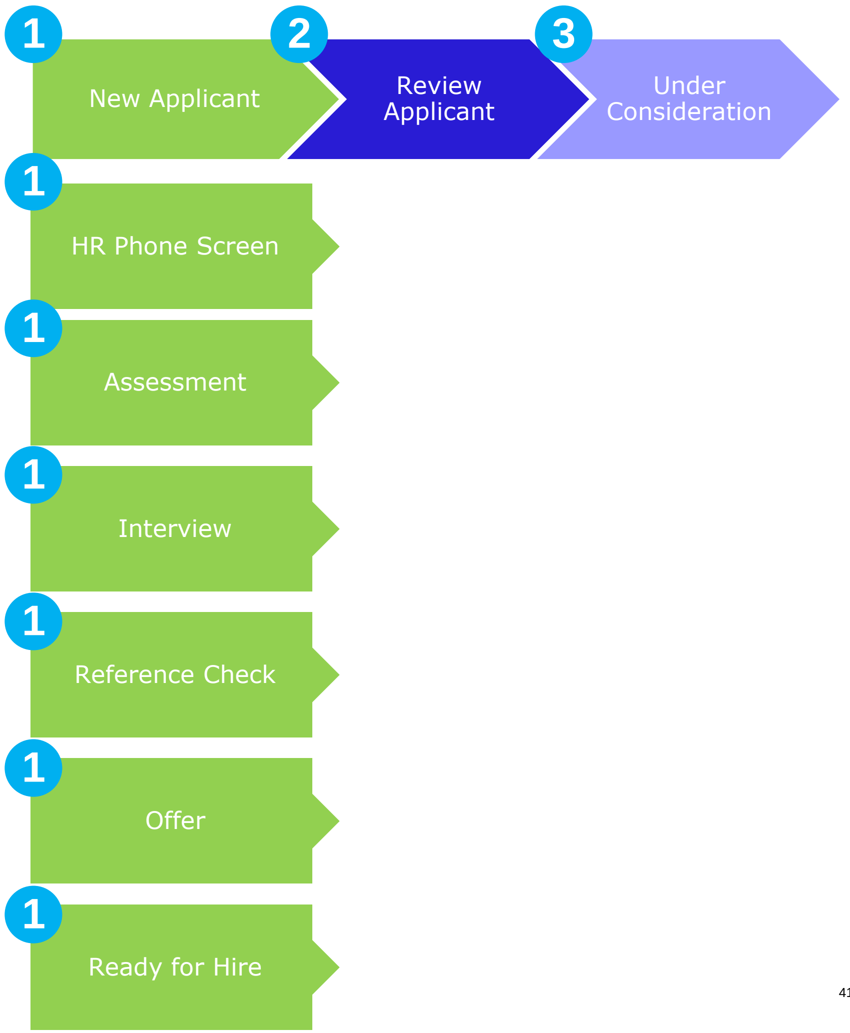
c) *Primary Recruiter can take action on the applicant pool and the Recruiting Screener has viewing capabilities only.*

Applicant Life Cycle Stages

Stages



Steps to Each Stage



Applicant Life Cycle – New Applicants Steps

- Workday received the candidate's application.
- The application has not been reviewed or dispositioned by the primary recruiter

Applicant Life Cycle – New Applicants Steps

- After initial review the Primary Recruiter moves the application to the Review step.
- Alternatively, after initial review, the candidate can be dispositioned and no longer considered for the position.

Applicant Life Cycle – New Applicants Steps

- This stage can be used as a holding place for candidates that should be considered to advance in the next stage.

Applicant Life Cycle Stages

Disposition Reasons

- Accepted another position
- Errors on resume or application
- Less effective phone screen or interview than applicant hired
- Less relevant education and/or experience than applicant hired
- No show for interview
- Unable to contact
- Withdrew Candidacy
- Duplicate Candidates
- Job no longer available
- Does not meet minimum qualifications

- At any point of the process, an applicant can be dispositioned
- Message delivery
  - No automatic, but via a manual notification via a customizable template

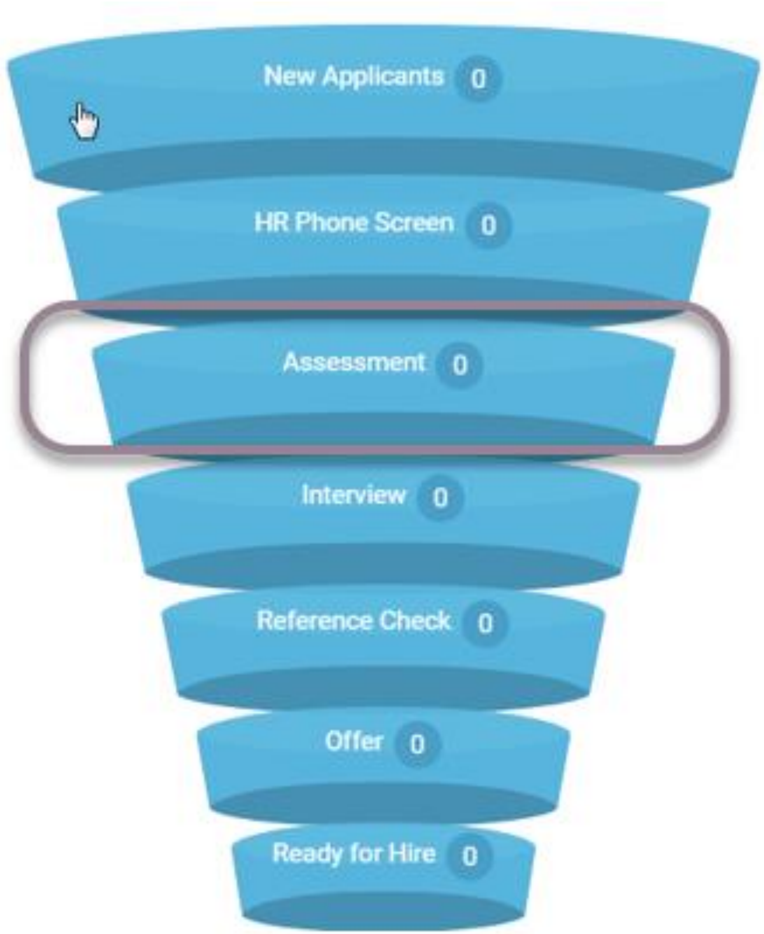
Applicant Life Cycle Stages

- If your interview process involves a phone screen, identified candidates can advance to the phone screen.
- No notification is sent to the applicant.

Applicant Life Cycle Stages

- Interview stage is a required stage for candidates.
- At this stage, Primary Recruiter can create the interview committee
- Interview committee will rate each interview within Workday.
- No notification is sent to the applicant. Coordination occurs offline.

Applicant Life Cycle Stages



- Some positions require clerical testing as part of the interview process.
- Shared Services assist by working the HRP to manage the scheduling process and reporting results to the HRP.

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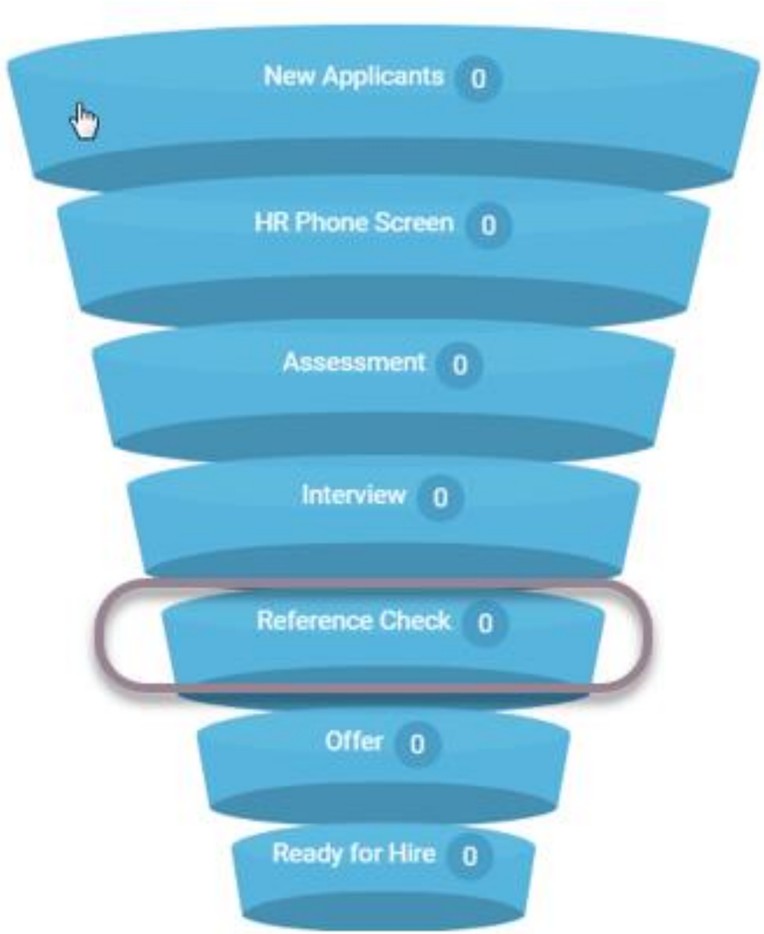
Applicant Life Cycle Stages



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Professional Reference Checks

HR-Talent Acquisition created this framework, which can be customized based upon unit or divisional business need. These questions reflect benchmarking with our Ivy Peer Group, researching best practices in higher education, and HR-Talent Acquisition's continued efforts to brand The University of Chicago as an employer of choice.

- Apply these guidelines universally, reflective of both internal and external candidates.
- Remember to give candidates advanced notice that you will be checking their references.
- Introduce yourself and explain purpose of the call. Confirm it is a convenient time to discuss.
- Describe the position for which the applicant has applied.
- Confirm the relationship between the reference and candidate.
- Be consistent. Ask the same questions for all final candidates and weigh the information equally; what disqualifies one candidate should be the basis for disqualifying any other candidates.

Requisition #: ______________ Position: ____

Applicant Name: ____

Reference Name: ____________________________ Reference Phone #: _______________

Date Completed: ____________________________ Unit Name: _______________________

Reference Check Completed By: _____________________

1. In what capacity did you work with the candidate (i.e., nature and length of relationship)?

2. What are/were his/her key contributions or impact on the organization (examples)?

Applicant Life Cycle Stages

- Via Workday an offer letter can be generated and further modified, but **not** sent through Workday.

Six Offer Letter Templates:

1. New Hire	4. New Hire Local 743
2. Lateral	5. Internal Local 743
3. Promotion	6. Temporary

- Within this stage, if the offer is accepted by the candidate, the Primary Recruiter sets the offer status in Workday.
- A “To Do” initiates background check and re-hire eligibility routes to Shared Services.

Applicant Life Cycle Stages

- After the background check is passed, the "Ready for Hire" is activated.
- Once the candidate is moved into "ready for hire" Workday will kick off the corresponding business process –Hire or Change Job.

Workday Recruiting Vocabulary

Applicant Tracking		
Workday Term	**Workday Definition**	**UChicago Jobs Term**
Primary Recruiter	Role assigned by the HRP for the specific job requisition. This role can move candidates throughout the candidate life cycle (take action on the profile). The HRP can assign themselves as the Primary Recruiter.	**HR Admin**
Recruiting Screener	Role assigned by the HRP for the specific job requisition. This role is view-only access on the candidate profile. (i.e. hiring manager, members of interview committee)	**Guest User**
No equivalent	Disqualifying questions do not exist in Workday, however the primary recruiter can utilize the filter feature on the candidate grid to highlight qualified and unqualified applicants.	**Disqualifying Questions**
Step/Stage Disposition Column	Column that documents the step/stage in which the applicant/candidate sits with in the life cycle.	**Status Column**
Funnel	A graphic that provides a high-level overview of the number of candidates and in which stage they sit. The funnel provides an automatic filter, through which you can see the candidate in the respective stages.	**No equivalent**
Candidate Grid	Location of candidate's information. Primary Recruiter can take action (move from one stage to the next) on the candidate.	**List of Candidates**
Awaiting Me	This feature provides a quick reference of what action is needed for the specific candidate. The field is active, which allows the Primary Recruiter to take action from the grid vs the Workday Inbox.	**No equivalent**
Un-post Job	Takes the job posting off the career site so no additional applicants can apply. Prior to removing, job must be posted for at least 7 calendar days.	**Close requisition**
Close Job	The job requisition can be closed if the department decides that they no longer need to fill the position.	**Cancel requisition**

Workday Recruiting Demonstration

THE UNIVERSITY OF CHICAGO

Knowledge Check

Stages of the Applicant Process

Question:

At what point can the Primary Recruiter place an applicant “Ready for Hire”?

a) *After the applicant accepted the written offer.*

b) *After the background check is initiated by Shared Services.*

c) *After the reference checks are completed.*

d) *After the background check is cleared by Shared Services.*

Shared Services Requests/Processes

Clerical Testing

Reference Check

Background Check

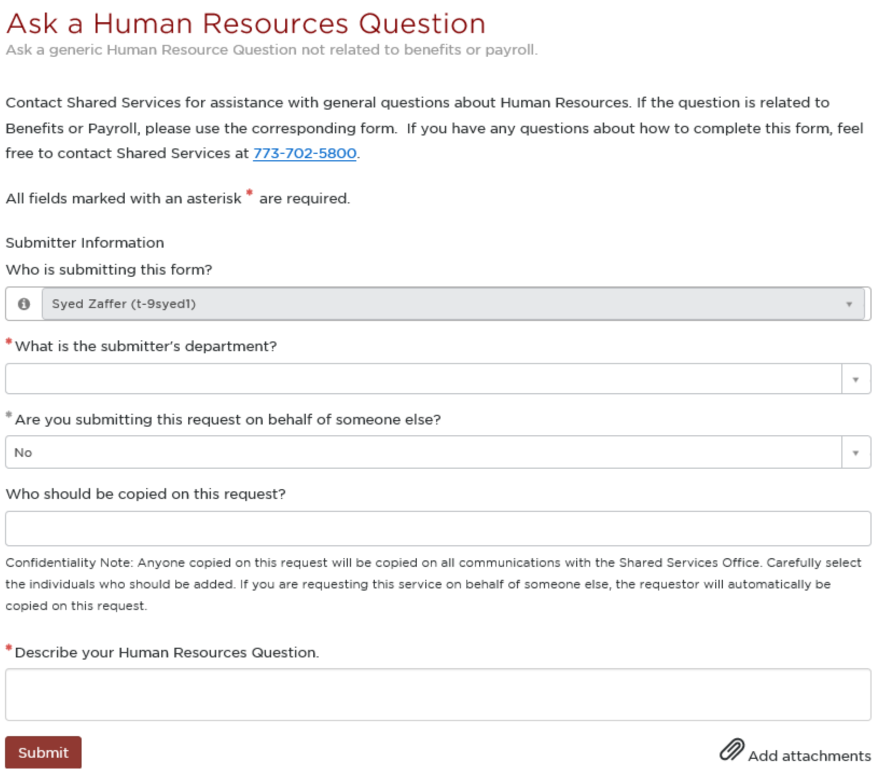
Clerical Testing for New Employees

Requesting with a ServiceNow Form

HRPs can submit a request through the Ask a Human Resources Question form

The requestor should provide the following information:

- Candidate name(s)
- Special testing accommodations for the candidate
- Type of test(s)
- Job Requisition Number
- Preferred day and time the testing should be completed
- Deadline to complete the testing



Ask a Human Resources Question

Ask a generic Human Resource Question not related to benefits or payroll.

Contact Shared Services for assistance with general questions about Human Resources. If the question is related to Benefits or Payroll, please use the corresponding form. If you have any questions about how to complete this form, feel free to contact Shared Services at 773-702-5800.

All fields marked with an asterisk * are required.

Submitter Information

Who is submitting this form?

Syed Zaffer (t-9syed1)

*What is the submitter's department?

*Are you submitting this request on behalf of someone else?

No

Who should be copied on this request?

Confidentiality Note: Anyone copied on this request will be copied on all communications with the Shared Services Office. Carefully select the individuals who should be added. If you are requesting this service on behalf of someone else, the requestor will automatically be copied on this request.

*Describe your Human Resources Question.

Submit

Add attachments

[Ask a Human Resources Question]

Reference Checks for Job Candidate

Requesting with a ServiceNow Form

Purpose: Option to request the SSO to conduct Reference Checks for a job candidate. The SSO will reach out to the references and compile all responses and send back to the HRP.

Process:

Request for SSO to complete Reference Checks via SN form	→	Conducts checks with each reference and compiles responses	→	Uploads document with all responses to Workday	→	Review responses and make decision on applicant
HRP		**SSO**		**SSO**		**HRP**

Key Considerations:

- HRP must inform applicant that references will be contacted
- Targeted reference check questions based on the type of position (Entry Level and Management Level)
- Note the total number of references that HRP would like to be contacted

Reference Checks

Ask a generic Human Resource Question not related to benefits or payroll.

Submit this request to the Shared Services Office to request Reference Checks for a Job Candidate. The Shared Services Office will reach out to the references provided by the applicant. Your department may request to have specific topics/questions to be discussed with the references along with our standard list of questions. If you have any questions about how to complete this form, please contact the Shared Services Office at 773-702-5800.

All fields marked with an asterisk * are required.

"Submitter Information"

Who is submitting this form?

Syed Zaffer (t-9syed1)

*What is the submitter's department?

*Are you submitting this request on behalf of someone else?

No

Who should be copied on this request?

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*What is the Requisition Number of the position?

JR##### and to ensure that the field is limited to 5 digits

Reference Check form

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Background Check

Process and Requesting Exceptions

Shared Services Office:

1. After the candidate receives and accepts a conditional job offer, and the Primary Recruiter sets the offer status in Workday, SSO will receive a To Do step to initiate a background check.
2. SSO will select the appropriate type of Background Check package based on information in the Job Requisition. The Background Check will be submitted to GIS for completion.
3. GIS will provide the SSO with a complete report. SSO will communicate with the HRP and/or hiring manager and confirm whether the applicant is eligible for employment in the position.
4. Once the Background Check is "Passed", HRP will move candidate to "Ready for Hire" in Workday.

Requesting Exceptions:

- In certain circumstances, the Associate Vice President of HR or the department/unit head may authorize an applicant to begin work before a report is received.
- Upload letter of authorization on department letterhead to candidate's documents tab in Workday using the new template.

[TODAY'S DATE]

Dear Shared Services Office,

The [DEPARTMENT NAME] would like to request an exception to allow [EMPLOYEE NAME] to begin working in the position of [POSITION NAME] prior to the completion of the background check required under Policy 204 of the University.

The reason for this exception request is as follows:

____

____

____

We understand that [EMPLOYEE NAME's] continued employment with the University is contingent upon the results of the background check.

Please contact me at [EMAIL ADDRESS and PHONE NUMBER] if you have further questions.

Sincerely,

[NAME]
[TITLE]
[DEPARTMENT NAME]

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Dates and Timelines

Week of November 20th

- Weekly e-mail communication will begin
- Release of final supporting resources (QRGs and job aids) as part of the weekly communication

December 18, 2017

- Workday Recruiting goes live! - “Weekly Workday Recruit Camp” *(December 21 – January 25)*
- Begin creating job requisitions in Workday
- Begin requesting posting exceptions in Workday via the Create/Edit Position business process
- Background Check initiation by Shared Services via GIS
- Applicant review through Workday

April 22, 2018

- Contract with UChicago Jobs ends
- All staff positions
- All outstanding and open requisitions must move to Workday
- No mass data conversion from UChicago Jobs to Workday
- Solution to access UChicago Jobs data for ongoing access to job descriptions and requisitions

Course Wrap-Up

POLICIES

- Policy 204 – Reference and Background Check

JOB AIDS

- Extra Outreach Efforts; Extra Outreach Plan Framework
- Workday vs UChicago Jobs Translation
- Job Description Template

QUICK REFERENCE GUIDES (QRG)

- Applicant Tracking

How to engage with the Shared Services Office

The Shared Services Office can be reached in several ways. The Help Desk is available to provide support in HR, Payroll, and Procure-to-Pay. The online portal allows users to submit requests and live chat. You may also search for answers to common questions in the Knowledge Base.

1. **Phone: Call the Help Desk at 773-702-5800**
2. **Chat: Navigate to “Live Chat” or “Chat is Available” at services.uchciago.edu**
3. **Online: Submit requests via a form and search for information on the Knowledge Base at services.uchicago.edu**
4. **Shared Services Office website: Find out more about our services at sharedservices.uchicago.edu**