Workday Job Aid for Managers

Recruiting Process

Use this to fill an open position.

Job requisition:
• Create job requisition (page 3)
• View job requisition change history (page 13)
• View job posting details (page 15)

Candidate review:
• Candidate screening (page 17)
• Candidate interview (page 20)
• Compare candidates (page 25)

To learn more about Workday, find job aids and videos at the Workday Help website at workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org.

Trinity Health

Updated as of December 20, 2016
Recruiting Worklet

**Actions and Views available to you in the Recruiting worklet:**

**Actions**
- My Candidates
- Create Job Requisition

**View**
- My Open Job Requisitions
- Job Requisition

**Recent**
- 00000269 Foundation Associate-1 (Open)

- **My Candidates**
  View candidates who have applied for your open job posts; click the name to see details

- **Create Job Requisition**
  Start the Job Requisition process

- **My Open Job Requisitions**
  View your open job requisitions; click the requisition link to see details

- **Job Requisition**
  Choose a requisition to see details

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Business Process Steps and Roles — Create Job Requisition

Process roles are designated by “security role,” which do not reflect actual job titles. **People may have multiple roles.**

Create Job Requisition

As a manager, **you are responsible for initiating the creation of a job requisition.** However, you should coordinate with the Recruiter to discuss the requisition, the posting(s), and ongoing candidate activities.

- **Initiate Create Job Requisition:** Manager
- **Review1:** Manager’s Manager
- **Review2:** Primary Recruiter
- **Approve:** Labor Resource Approver
- **Post Job:** Recruiter

Additional Actions You Can Take

Find instructions on additional actions you can take to job requisitions and job postings:

- Page 13: View Job Requisition Change History
- Page 15: View Job Posting Details

NOTES:

- Until all security roles are assigned across the Ministry, Review2 may go to a Recruiter instead of the assigned Primary Recruiter.
- If the requisition is for a new position not yet in Workday, additional reviews/steps will be required.
Create Job Requisition

In Workday, a position is a chair, and a requisition is the permission to put a body in that chair. Chairs can be filled for new positions, editing positions (e.g., one FT to two PT) or refilling a vacating/vacated position.

Note that creating a job requisition to refill a position does not change anything for the colleague currently in the position.

Before You Start

Ensure local policies and procedures have been followed and appropriate approvals have been received before acting. This may include:

- Manager works with HR Partner, Manager’s Manager, Primary Recruiter, and Labor Resource as necessary to confirm requisition requirements (e.g., timing, budget)
- Determine whether or not the requisition should be confidential

Data Needed for Job Requisition

The following data will be required:

- For Existing Position: Position for which the job requisition is being created for (Note: If you are creating a new position, the workflow/process will include additional steps in Workday.)
- Recruiting Start Date: Date recruiting/job posting should start
- Target Hire Date: Ideal date for the candidate to start
- Qualifications: Required or preferred education, language, certifications, work experience, competencies, responsibilities, skills, and/or training details
- Assign Roles: Name of confidential assignee or primary recruiter to move job requisition/posting forward

Notifications

(a colleague or department should be notified outside of the Workday system)

- None.

Variations

- Approval process may vary by Health Ministry. There should be no variations to the Workday process across the system.

Other Resources

- Contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org.

SPECIAL NOTE:
While adding comments where indicated may be helpful for the process, please note that comments are auditable and therefore should be appropriate for the section.
Create Job Requisition

Process Steps

1. Log in to Workday
2. Click Recruiting
3. Click Create Job Requisition

Which role(s) can do this step?
• Manager

Alternate starting steps from the Workday home page:
1. Type create job requisition in the search box and press Enter
2. Click Create Job Requisition from the search results
3. Continue at step 4
Process Steps (continued)

4. Click **For Existing Position** and click the **prompt icon**; choose the existing position for which the job requisition is being created for (* indicates required information)

5. Click **OK**

**NOTE:** If the requisition is for a new position not yet in Workday, click **Create New Position**. Additional information and reviews may be required.

**WHAT IS THIS?**

- **Copy Details from Existing Job Requisition**
  Use this to start with details from an existing job requisition

- **Supervisory Organization**
  You will default as the supervisory organization (see definition below)

- **Worker Type**
  Choose employee or non-employee (formerly called POI)

**HINT:** Hover to the right and click the **related actions icon** (“brick”) then click the position link to see some details and confirm this is the position you want to choose.

**What is a Supervisory Organization? (SUPV ORG)**

Supervisory Organization is the manager hierarchy within Trinity Health. Each person who has colleagues reporting to him/her represents a SUPV ORG. Colleagues or “workers” are members of their people manager’s SUPV ORG.
Create Job Requisition

Process Steps (continued)

6. Click the **edit icon** to complete the Recruiting Information screen (* indicates required information)

7. Click **Next**

**Reason**
Choose from:
- New Position
- Replacement
- Replacement – FTE Change

**Replacement For**
If position is already vacated, will auto-populate; if not, use prompt icon to choose from options if applicable

**Recruiting Instruction**
Choose from:
- Post Externally Only
- Posting Not Required
- Post Internally and Externally
- Post Internally Only

**Recruiting Start Date**
Date recruiting may begin

**Target Hire Date**
Date you’d like new hire to begin work

**Target End Date**
DO NOT USE

**Referral Payment Plan**
Choose from payment plans

**WHAT IS THIS?**
Click the checkmark icon to accept changes

**NOTE:** You will not be able to Hire before the Target Hire Date.

**FUTURE ENHANCEMENT:** Leave blank until payment plans are added.
**Process Steps (continued)**

8. Click the **edit icon** to complete/update Job screen (*indicates required information*)

   - **Job Posting Title**
     - Update job posting title to reflect what you want the job posting to say *(can be more than just title; marketing)*

   - **Job Description boxes**
     - Add or review the job descriptions to show on the job posting

   - **Worker Sub-Type**
     - Options will appear based on Worker Type chosen

   - **Time Type**
     - Choose full-time or part-time *(choose part-time for “casual” positions)*

   - **Primary Location**
     - Location where the position resides

   - **Primary Job Posting Location**
     - Location to list in the job posting *(e.g., Livonia instead of a specific Livonia facility)*

   - **Additional Locations**
     - Additional locations where the position may reside

   - **Additional Job Posting Locations**
     - Additional locations to include in the job posting

   - **Scheduled Weekly Hours**
     - Calculates FTE

   - **Work Shift**
     - The shift to be worked by the colleague; choose from menu options *(NOTE: Values are new for the Workday system)*

   - **Questionnaire**
     - Choose from:
       - Trinity Standard Internal Questionnaire
       - Trinity Standard External Questionnaire

   - **FUTURE ENHANCEMENT:** Additional questionnaires for specific positions will be added at a later time.

9. Click **Next**

   - **NOTE:** Questionnaires will be required before it can be approved by Reviewers.
Process Steps (continued)

10. Click the **edit icon** or **Add** to complete/update each section of the Qualifications screen (*indicates required information*)

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**WHAT IS THIS?**

**Education**
- Degree(s) preferred or required

**Language**
- Language(s) preferred or required

**Certifications**
- Certification(s) preferred or required

**Responsibilities**
- Open text box to describe responsibilities

**Skills**
- Skill(s) preferred or required
  (choose from menu options)

**Training Details**
- Training(s) completed that are preferred or required

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**FUTURE ENHANCEMENT:** Some Qualifications will be built in based on the Job Profile attached to the position.

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**NOTES:**
- You may add more than one qualification for each. Complete one, then click **Add** to add another.
- Qualifications can drive analytics, which will allow for greater talent management in the future.

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11. Click **Next**
Process Steps (continued)

12. Click the **edit icon** to complete/update each section of the Organizations screen (*indicates required information*)

13. Click **Next**

**WHAT IS THIS?**

- **Company**
  - Name of Health Ministry
- **Cost Center**
  - Department or business unit used to track expenses and is responsible for the cost
- **Religious Order**
  - Employment agreement used to capture affiliation with the religious order *(for specific set of colleagues)*
- **Absence Group Exceptions**
  - Sick/Illness, PTO, and other leave groups; choose from options if applicable
- **Pay Rule**
  - Important for timekeeping system; code that determine this colleague’s timekeeping rules

**FUTURE ENHANCEMENT:** All positions will eventually have this information added. Please complete as noted below if not auto-populated.

- **Financial Organization**
  - Business Unit or Process Level; ties to Health Ministry
- **Absence Group Exceptions**
  - Sick/Illness, PTO, and other leave groups; choose from options if applicable
- **Pay Rule**
  - Important for timekeeping system; code that determine this colleague’s timekeeping rules
**Create Job Requisition**

**Process Steps (continued)**

14. Click **Add** to add any attachments (*indicates required information*)

15. Click **Next**

16. Click the **edit icon** or **Add** to complete/update the Hourly section of the Compensation screen

17. Click **Next**

**HINT:** Attachments could include things such as an overview of why requesting position, the job requisition form, etc.

**Click the checkmark icon to accept changes**

**FUTURE ENHANCEMENT:** An on-screen icon will be added to help make compensation decisions within pay range.

**NOTE:** This is a target amount for the job requisition. The final amount will not be finalized until the Hire process. If you go outside of the guidelines, the Compensation Partner will review.

SCREEN CONTINUES IN NEXT COLUMN
18. Click Add to assign the Primary Recruiter

19. Click Next

20. Review the summary screen; to return to a section, click Guide Me next to that section

21. Click Submit

22. Process moves forward; click Done

NEXT STEPS:
- Your manager will review.
- Primary Recruiter will review.
- Labor Resource Approver will approve.
- Primary Recruiter will post the job and do the initial resume screening.
- You and Primary Recruiter work together on the rest of the recruiting process.

NOTE: The Primary Recruiter is responsible for the job requisition and job posting once you’ve completed the Initiate step. Additionally, you will work with the Primary Recruiter for the remainder of the recruiting process.

NOTE: If creating a new position not yet in Workday, these additional steps will occur:
- Review — HR Partner
- Change Organization Assignments — HR Partner
- Default Compensation — HR Representative or Recruiter
Job Requisition — Additional Actions

VIEW JOB REQUISITION CHANGE HISTORY

1. Log in to Workday
2. Click Recruiting

3. There are two ways to access a job requisition to take additional actions:

   A. RECENT
   If your job requisition is recent, it may show up under Recent. Click the job requisition to move forward.

   B. VIEW
   • Click My Open Job Requisitions
   • Click OK
   • Click the link to the job requisition you want to open

   NOTE: You can only view change history if a change has been made to the job requisition.
4. Click the related actions icon (‘brick’) next to your existing job requisition

5. Go to Job Change and click View Job Requisition Change History

6. Click the Job Requisition Event to see the history and any open or skip items

NOTE: This only appears as a menu item if a change has been made to the job requisition.

Shows current and prior values

Click to view the details of the job requisition
Job Requisition — Additional Actions

**VIEW JOB POSTING DETAILS**

1. Log in to Workday
2. Click Recruiting

3. There are two ways to access a job requisition to take additional actions:

   **A. RECENT**
   
   If your job requisition is recent, it may show up under Recent. Click the job requisition to move forward.

   **B. VIEW**
   
   - Click My Open Job Requisitions
   - Click OK
   - Click the link to the job requisition you want to open
4. Click **Job Postings** in your existing job requisition

5. Click **Actions** next to the job posting you want to view (job posting shows in window)
Candidate Screening

The process of reviewing and choosing candidates (Job Application) is a dynamic process. This means the steps below DO NOT have to be followed in order. Steps can be skipped or followed in a different order based on the individual circumstances.

This section of the job aid describes how — as a Manager — you would perform the candidate screening within the Workday system.

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</tr>
</tbody>
</table>

Notifications
(a colleague or department should be notified outside of the Workday system)

- None.

Variations

- There should be no variations to the Workday process across the system.

Other Resources

- Contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org.

SPECIAL NOTE:
While adding comments where indicated may be helpful for the process, please note that comments are auditable and therefore should be appropriate for the section.
MANAGER PHONE SCREENING

The Recruiter will move a candidate forward to you for phone screening.

1. Log in to Workday
2. Click Inbox
3. Find the email and click to open (opens in the right pane of the screen)
4. Contact the candidate to schedule and conduct a phone screening (see instructions in yellow box)
MANAGER PHONE SCREENING (continued)

5. When screening is complete, click your feedback/direction choice.

6. Click Submit.

7. Process moves on; click Done.

NOTE: If you select one of the following options, it will forward to the Primary Recruiter, and he/she will need to return it to you to complete any feedback:
- Reviewed – Further Information Needed
- Reviewed – Manager Scheduling Interview
- Reviewed – Recruiter to Schedule Interview
- None of the Above
Candidate Interview

The process of reviewing and choosing candidates (Job Application) is a dynamic process. This means the steps below DO NOT have to be followed in order. Steps can be skipped or followed in a different order based on the individual circumstances.

This section of the job aid describes how — as a Manager — you would perform the candidate interview within the Workday system.

### Notifications

*(a colleague or department should be notified outside of the Workday system)*

- None.

### Variations

- Interview practices vary by Ministry. There should be no variations to the Workday process across the system.

### Other Resources

- Contact your Tier 1 resource, as noted on the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).

### Actions You Can Take

- Page 21: Schedule Interview Team
- Page 23: Rate Interview

### Step Process Roles

- **Review** Primary Recruiter
- **Screening** Manager; Primary Recruiter
- **Assessment** Primary Recruiter
- **Interview** Manager; Primary Recruiter
- **Reference Check** Primary Recruiter
- **Offer** Primary Recruiter
- **Employment Agreement**
- **Background Check** Primary Recruiter; Recruiting Coordinator

### SPECIAL NOTE:

While adding comments where indicated may be helpful for the process, please note that comments are auditable and therefore should be appropriate for the section.
SCHEDULE INTERVIEW TEAM

The Recruiter will move a candidate forward to you to schedule the interview team. The Recruiter may schedule interviews on your behalf.

1. Log in to Workday
2. Click **Inbox**
3. Find the email and click to open *(opens in the right pane of the screen)*
4. Add the interviewers and interview dates; click the **add icon** to add additional interviewers

5. Type **comments** for the interview team

6. Click **Submit**

7. Click **Done**

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**NOTE:** Currently Workday does not integrate with your calendar. You will need to add interview appointments to your calendar separately.

**NOTE:** Use the arrows to change the order of the interviews.

Go to next page to see the steps to Rate Interview once the interview is complete.
RATE INTERVIEW

After you complete the interview, provide feedback and direction for the Recruiter.

1. Log in to Workday
2. Click **Inbox**
3. Find the email and click to open (opens in the right pane of the screen)
RATE INTERVIEW (continued)

4. Choose a rating

5. Type comments with direction for the Recruiter

6. Click Submit

7. Click Done

Recruiter will continue the process, working with you as needed and keeping you informed of the progress.
COMPARE ASSESSMENTS/INTERVIEW FEEDBACK

Compare assessments and interview feedback across candidates.

1. Log in to Workday
2. Click Recruiting

3. Click My Open Job Requisitions
COMPARE ASSESSMENTS/INTERVIEW FEEDBACK (continued)

4. Screen defaults to Manager; change or click OK

5. Click the related actions icon ("brick") next to the requisition

6. From the Reporting menu, choose the item you want to compare