

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
Livonia, MI

Recruiting Worklet

Actions and Views available to you in the Recruiting worklet:



ACTIONS

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

VIEWS

My Open Job Requisitions

View your open job requisitions; click the requisition link to see details

Job Requisition

Choose a requisition to see details

RECENT

Job Requisition

Open a recent requisition to see details

Create Job Requisition

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

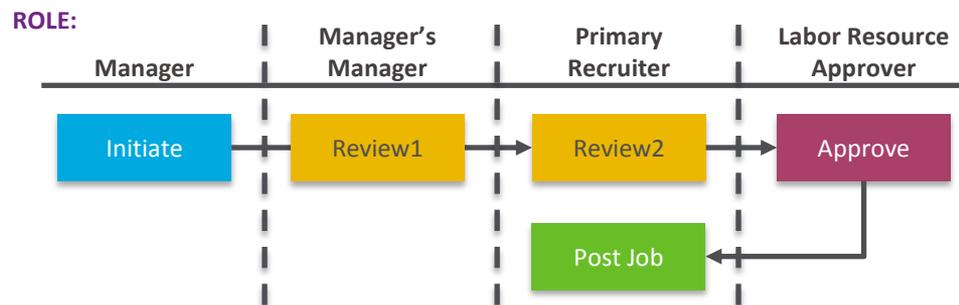
As a manager, you are responsible for initiating the creation of a job requisition. However, you should coordinate with the Recruiter to discuss the requisition, the posting(s), and ongoing candidate activities.

- ❑ **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

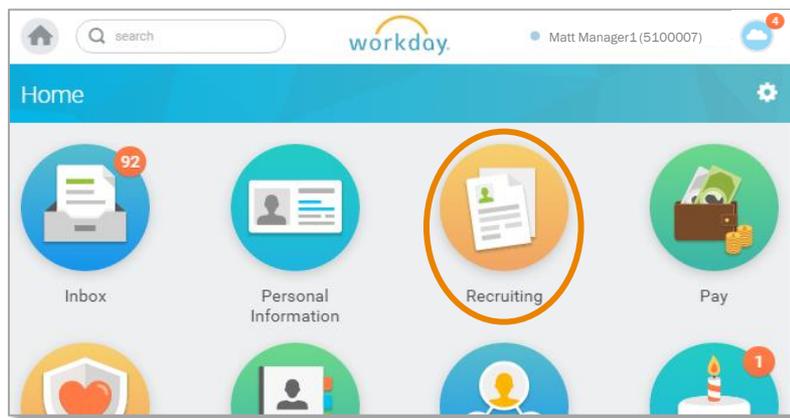
Process Steps

Initiate Job Requisition

Which role(s) can do this step?

- Manager

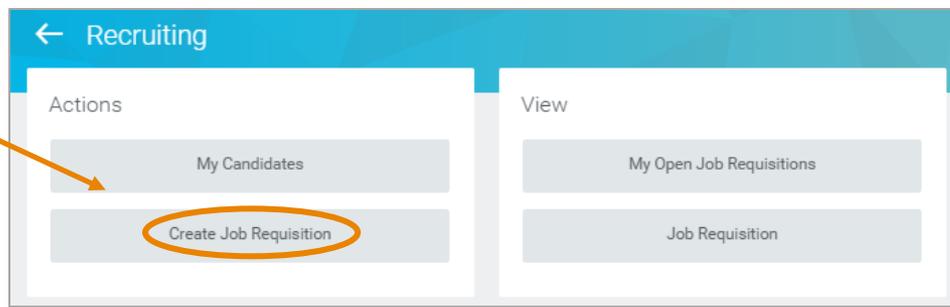
1. Log in to Workday
2. Click **Recruiting**



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

3. Click **Create Job Requisition**



Create Job Requisition

Initiate Job Requisition

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)

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)

- 5. Click **OK**

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)

Initiate Job Requisition

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

Create Job Requisition

Please fill out all data.

Recruiting Information ▾

Recruiting Details

Reason *

Replacement For

Recruiting Information ▾

Recruiting Details

Reason *

Replacement For

Recruiting Instruction
select one

Recruiting Start Date *
MM / DD / YYYY

Target Hire Date *
MM / DD / YYYY

Target End Date
MM / DD / YYYY

Referral Details

Referral Payment Plan

Back Next

7. Click **Next**

WHAT IS THIS?

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

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

FUTURE ENHANCEMENT: Leave blank until payment plans are added.

Create Job Requisition

Process Steps (continued)

Initiate Job Requisition

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

Job Details

Job Posting Title *
Intern-1

Justification

Job Profile *
SO_INTERN_1722

Job Description Summary

Job Description

Job Families for Job Profile
Foundation

Worker Sub-Type *
Intern (Trainee)

Time Type *

WHAT IS THIS?

- 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

NOTE: Most Job Details will auto-populate based on the Job Profile.

- 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*)

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

WHAT IS THIS?

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

NOTE: Questionnaires will be required before it can be approved by Reviewers.

9. Click **Next**

Compensation Details

Compensation Grade
SO_MGR-PROF

Questionnaire

Internal Career Site - Primary

Internal Career Site - Secondary

External Career Sites - Primary

External Career Sites - Secondary

Back Next

Create Job Requisition

Initiate Job Requisition

Process Steps (continued)

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

The screenshot shows the 'Qualifications' screen with a progress bar at the top. Below the progress bar are sections for Education, Language, Certifications, Work Experience, and Competencies, each with an 'Add' button. A callout points to the 'Add' button in the Education section. To the right, a detailed view of the 'Education' form is shown, with callouts for a 'checkmark icon' and a 'prompt icon for options'. At the bottom of the Education form, there are 'Back' and 'Next' buttons, with a callout pointing to the 'Next' button.

Click the **checkmark icon** to accept changes

Click the **prompt icon** for options

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

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.

WHAT IS THIS?

- Education**
Degree(s) preferred or required
- Language**
Language(s) preferred or required
- Certifications**
Certification(s) preferred or required
- Work Experience**
Not currently in use
- Competencies**
Will be used for performance management; options are not job specific
- 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

SCREEN CONTINUES IN NEXT COLUMN

11. Click **Next**

Create Job Requisition

Initiate Job Requisition

Process Steps (continued)

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

The screenshot shows a mobile application interface for 'Organizations'. It features a list of fields: Company, Cost Center, Other, Religious Order, HR Company, Financial Organization, Absence Group Exceptions, and Pay Rule. Each field has an edit icon (pencil) to its right. A callout box points to the edit icon for 'Cost Center', showing a detailed view of the 'Cost Center' field with a menu icon, a back arrow, and a checkmark icon. Another callout points to the checkmark icon, indicating that clicking it accepts changes. A third callout points to the 'Next' button at the bottom right of the screen.

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

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)
- HR Company**
Code assigned to HR department; ties to Health Ministry

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

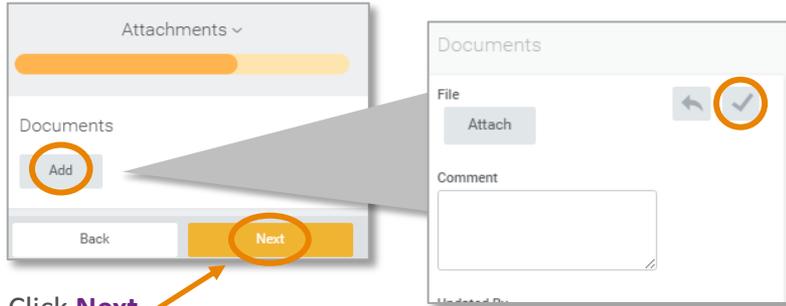
13. Click **Next**

Create Job Requisition

Process Steps (continued)

Initiate Job Requisition

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



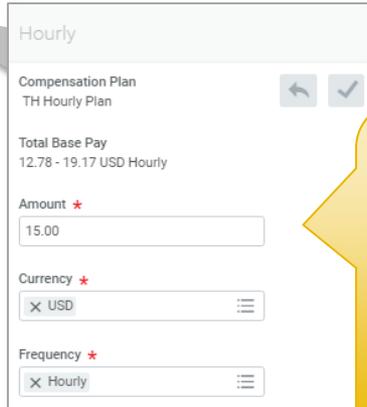
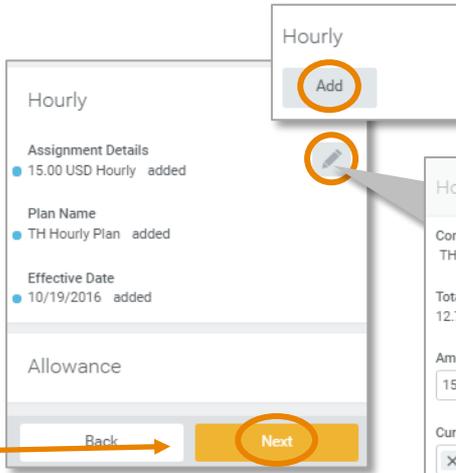
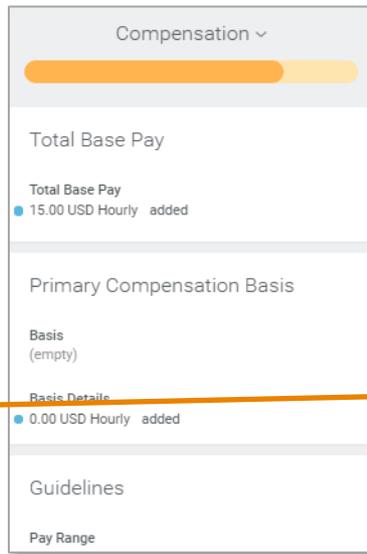
HINT: Attachments could include things such as an overview of why requesting position, the job requisition form, etc.

Click the **checkmark icon** to accept changes

15. Click **Next**

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

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



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.

17. Click **Next**

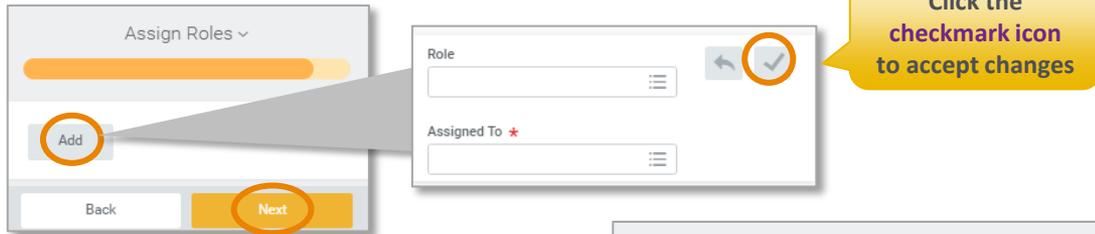
SCREEN CONTINUES IN NEXT COLUMN

Create Job Requisition

Process Steps (continued)

Initiate Job Requisition

18. Click **Add** to assign the Primary Recruiter



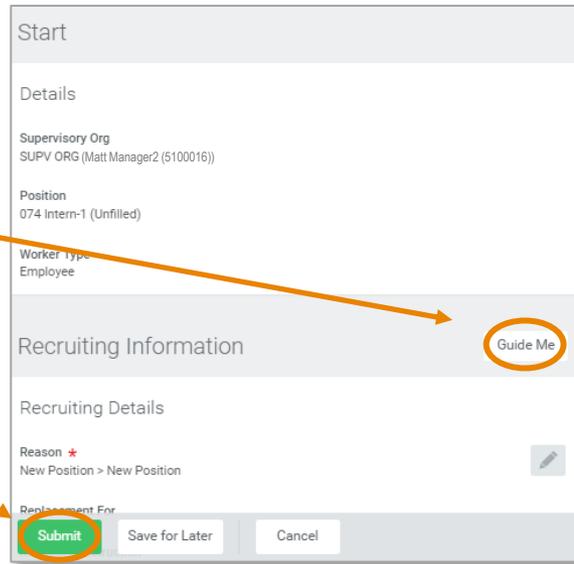
NOTE: The Primary Recruiter is responsible for the job requisition and job posting once you've completed the Initiate step. Additionally, you will work with the Primary Recruiter for the remainder of the recruiting process.

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.

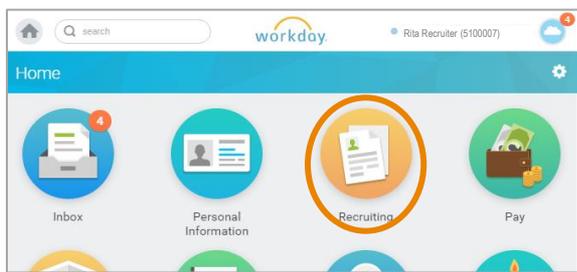
NOTE: If creating a new position not yet in Workday, these additional steps will occur:

- 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**



Additional Actions –
Job Requisition

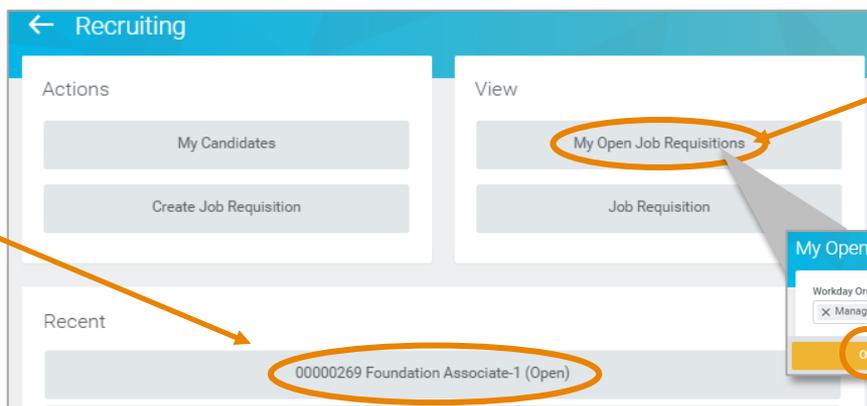
View Job Requisition
Change History

NOTE: You can only view change history if a change has been made to the job requisition.

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

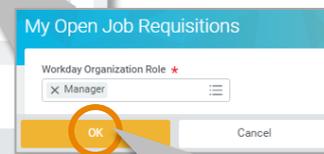
A. RECENT

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

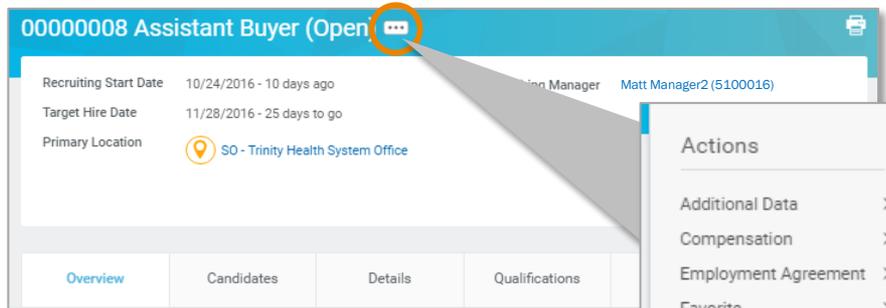


Job Requisition	Primary Location
00000269 Foundation Associate-1 (Open)	SPNY - 425 New Scotland Ave Albany, NY
00000270 Intern (Open)	SO - System Of Newtown Square, PA

Job Requisition — Additional Actions

VIEW JOB REQUISITION CHANGE HISTORY (continued)

- Click the **related actions icon** (“brick”) next to your existing job requisition



- Go to Job Change and click **View Job Requisition Change History**

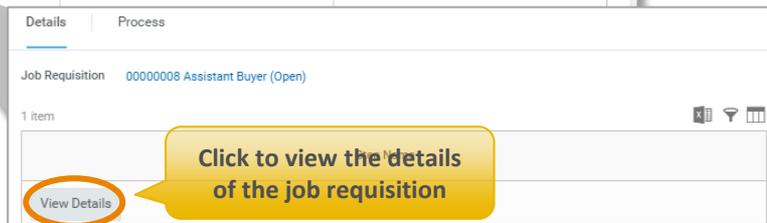


NOTE: This only appears as a menu item if a change has been made to the job requisition.

- Click the **Job Requisition Event** to see the history and any open or skip items



Shows current and prior values



Click to view the details of the job requisition

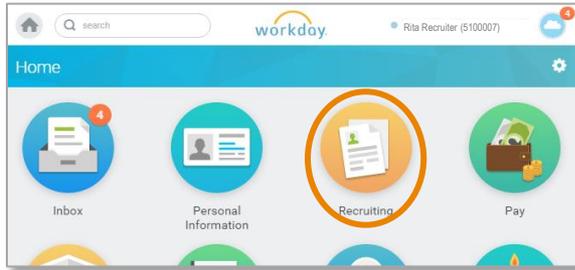
Additional Actions –
Job Requisition

View Job Requisition
Change History

Job Requisition — Additional Actions

VIEW JOB POSTING DETAILS

1. Log in to Workday
2. Click **Recruiting**



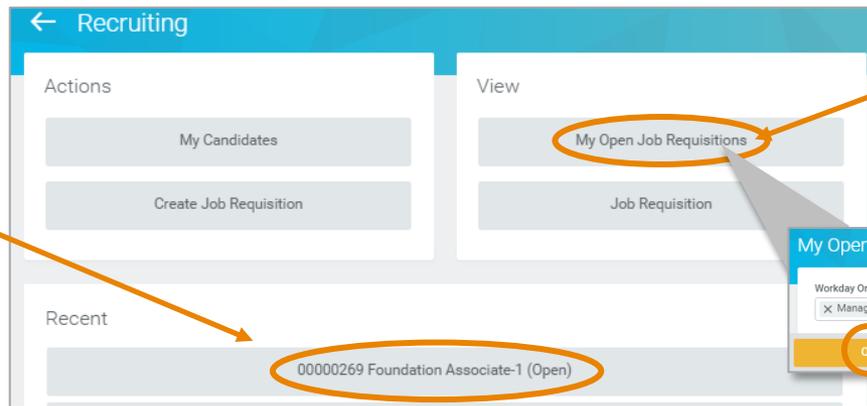
Additional Actions –
Job Requisition

View Job
Posting Details

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

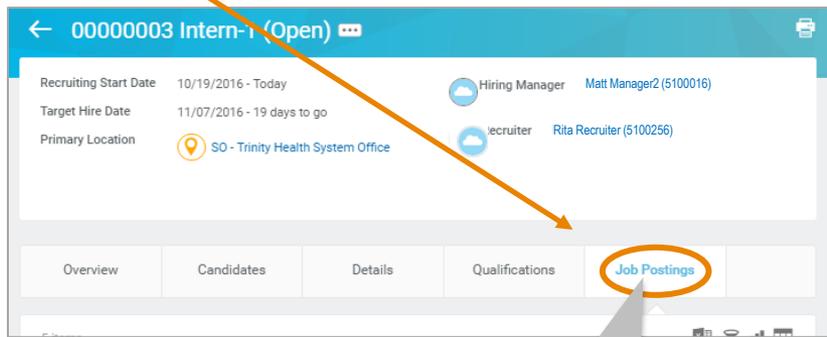
- Click **My Open Job Requisitions**
- Click **OK**
- Click the link to the **job requisition** you want to open

Job Requisition	Primary Location
00000269 Foundation Associate-1 (Open)	SPNY - 425 New Scotland Ave Albany, NY
00000270 Intern (Open)	SO - System Of Newtown Square, PA

Job Requisition — Additional Actions

VIEW JOB POSTING DETAILS (continued)

- Click **Job Postings** in your existing job requisition



- Click **Actions** next to the job posting you want to view
(job posting shows in window)

A screenshot of the "Job Postings" tab in the mobile application. It shows a list of 5 items. The first item is highlighted with an orange arrow pointing to the "Actions" button in the "Action" column. The table has the following columns: "Job Posting Site Name", "Posting Start Date", "Posting End Date", "Primary Posting", "Posting Cost", "Posting URL", and "Action".

Job Posting Site Name	Posting Start Date	Posting End Date	Primary Posting	Posting Cost	Posting URL	Action
Monster	10/19/2016			0	/job/SO--Trinity-Health-System-Office/Intern-1_00000003-4	Actions
LinkedIn	10/19/2016			0	/job/SO--Trinity-Health-System-Office/Intern-1_00000003-3	Actions
Indeed	10/19/2016			0	/job/SO--Trinity-Health-System-	Actions



Additional Actions –
Job Posting

View Job
Posting Details

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.

Step	Process Roles
<input type="checkbox"/> Review	Primary Recruiter
<input type="checkbox"/> Screening	Manager ; Primary Recruiter
<input type="checkbox"/> Assessment	Primary Recruiter
<input type="checkbox"/> Interview	Manager ; Primary Recruiter
<input type="checkbox"/> Reference Check	Primary Recruiter
<input type="checkbox"/> Offer	Primary Recruiter
<input type="checkbox"/> Employment Agreement	
<input type="checkbox"/> Background Check	Primary Recruiter; Recruiting Coordinator

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.

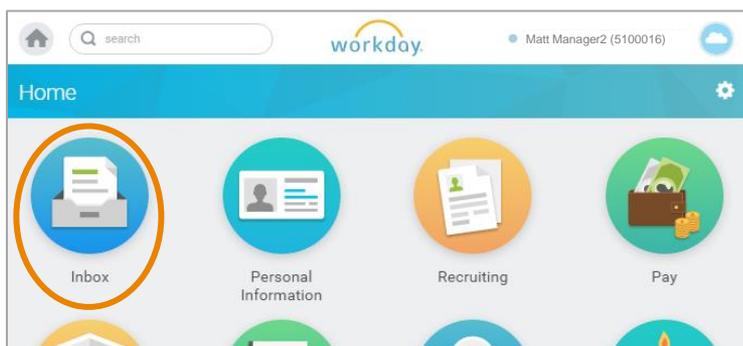
Candidate Screening

MANAGER PHONE SCREENING

Manager Phone
Screening

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

1. Log in to Workday
2. Click **Inbox**

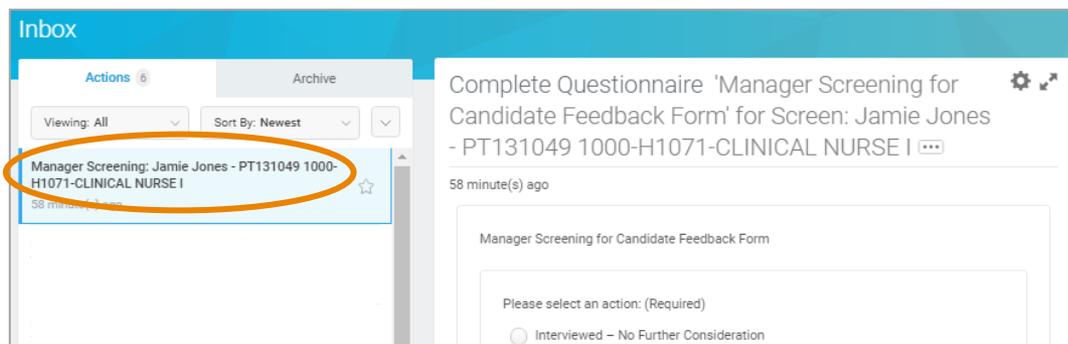


To find candidate's contact and other information:

1. Click **Recruiting**
2. Click **My Candidates**
3. Click the **related actions icon ("brick")** next to the candidate's name



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

Complete Questionnaire 'Manager Screening for Candidate Feedback Form' for Screen: Jamie Jones - PT131049 1000-H1071-CLINICAL NURSE I ...

1 hour(s) ago

Manager Screening for Candidate Feedback Form

Please select an action: (Required)

- Interviewed – No Further Consideration
- Interviewed – Not Selected – Consider for Future
- Interviewed – Proceed to Next Level Interview
- Reviewed – Consider for Another Position
- Reviewed – For Further Consideration
- Reviewed – Further Information Needed
- Reviewed – Manager Scheduling Interview
- Reviewed – Not Selected for Interview
- Reviewed – Recruiter to Schedule Interview
- None of the above

Submit Save for Later Cancel

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

6. Click **Submit**
7. Process moves on; click **Done**

You have submitted Complete Questionnaire 'Manager Screening for Candidate Feedback Form' for Screen: Jamie Jones - PT131049 1000-H1071-CLINICAL NURSE I ...

20 second(s) ago

Up Next

Anne Hoekstra (4199688)[C]

Screen Candidate

Done and Process

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.

Step	Process Roles
<input type="checkbox"/> Review	Primary Recruiter
<input type="checkbox"/> Screening	Manager ; Primary Recruiter
<input type="checkbox"/> Assessment	Primary Recruiter
<input type="checkbox"/> Interview	Manager ; Primary Recruiter
<input type="checkbox"/> Reference Check	Primary Recruiter
<input type="checkbox"/> Offer	Primary Recruiter
<input type="checkbox"/> Employment Agreement	
<input type="checkbox"/> Background Check	Primary Recruiter; Recruiting Coordinator

Actions You Can Take

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

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.

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.

Candidate Screening

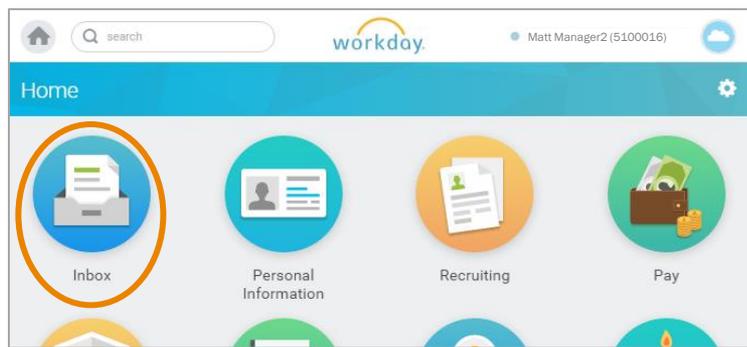
SCHEDULE INTERVIEW TEAM

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

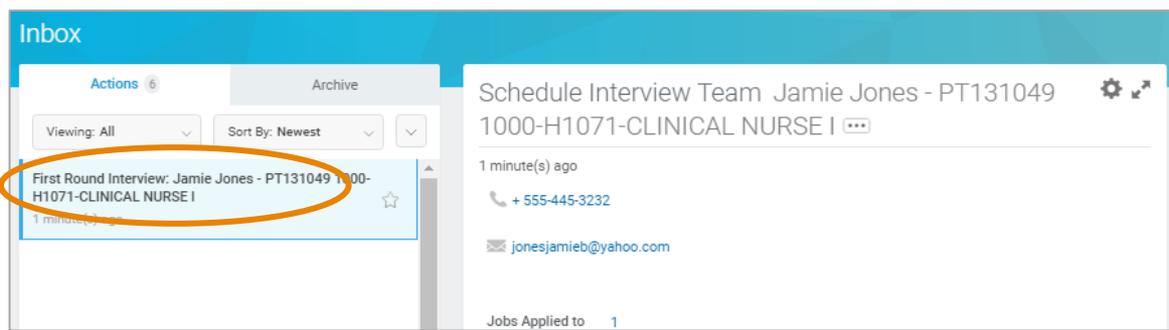
Candidate Screening

Schedule Interview Team

1. Log in to Workday
2. Click **Inbox**



3. Find the email and click to open
(opens in the right pane of the screen)



Candidate Screening

SCHEDULE INTERVIEW TEAM (continued)

4. Add the interviewers and interview dates; click the **add icon** to add additional interviewers

Schedule Interview Team Jamie Jones - PT131049 1000-H1071-CLINICAL NURSE I ...

1 minute(s) ago
+ 555-445-3232
jonesjamieb@yahoo.com

Jobs Applied to 1 Hiring Manager Matt Manager2 (5100016)
Action Required First Round Interview Recruiter Rita Recruiter (5100316)
Source Job Sites -> Career Builder

2 items

	Order	*Interviewer	Interview Date
+ -	▼		MM / DD / YYYY
+ -	▲ ▲	Matt Manager2 (5100016)	

Comment for Interview Team

enter your comment

Submit Save for Later Cancel

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

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

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

6. Click **Submit**

7. Click **Done**

Success! Event submitted Interview: Jamie Jones - PT131049 1000-H1071-CLINICAL NURSE I ...

1 minute(s) ago

Up Next
Luisa Cantelli Gutman
Rate Interview

Interview Candidate

Done and Process

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

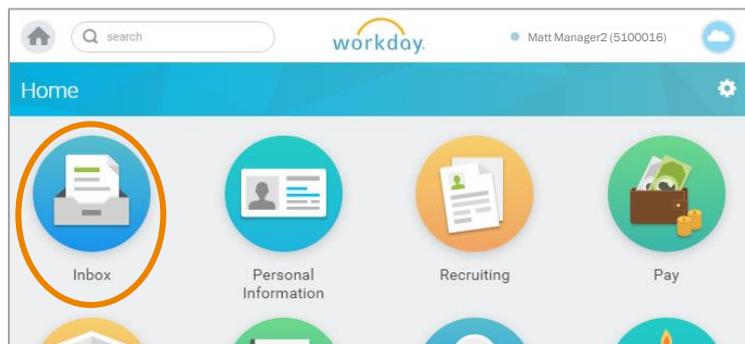
Candidate Screening

RATE INTERVIEW

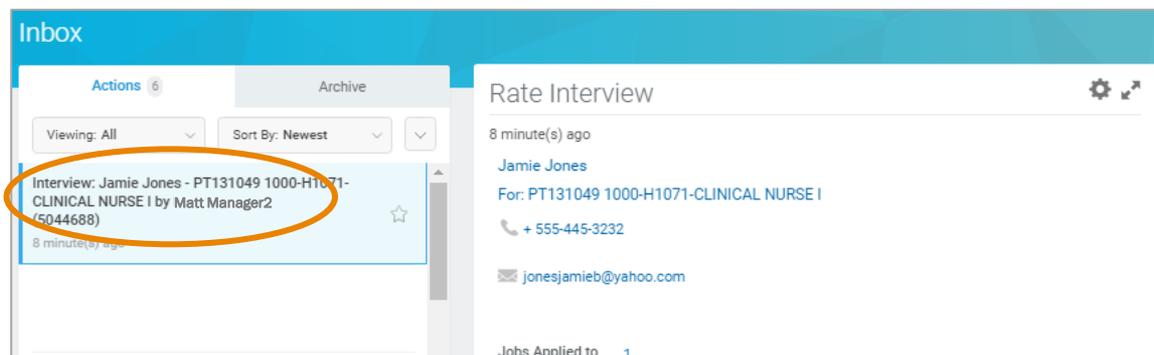
Candidate Screening
Rate Interview

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)



Candidate Screening

RATE INTERVIEW (continued)

4. Choose a rating

The screenshot shows the 'Rate Interview' form for Jamie Jones. The form includes fields for 'Rating' and 'Comment'. A dropdown menu is open over the 'Rating' field, showing options: 'select one', '5 - Highly Recommended', '4 - Recommended', '3 - Recommended with Reservations', '2 - Requires additional Evaluation', and '1 - Do Not Recommend'. The 'Submit' button is circled in green.

5. Type **comments** with direction for the Recruiter

6. Click **Submit**

7. Click **Done**

The screenshot shows a confirmation message: 'You have submitted Interview: Jamie Jones - PT131049 1000-H1071-CLINICAL NURSE I by [redacted] 25 minute(s) ago'. Below the message is a green checkmark icon and the text 'Process Successfully Completed'. At the bottom, there is a yellow button labeled 'Done'.

Recruiter will continue the process, working with you as needed and keeping you informed of the progress.

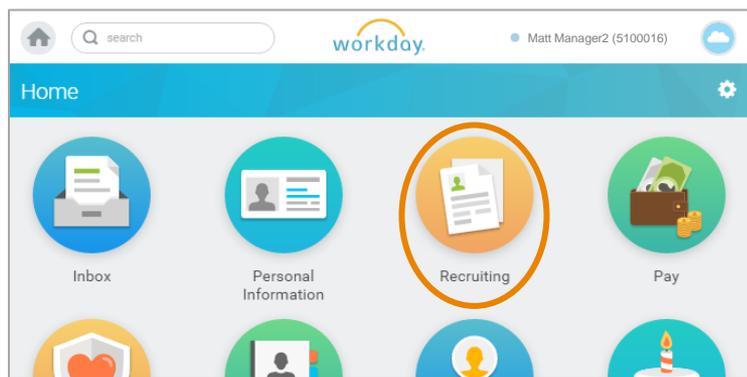
Compare Candidates

COMPARE ASSESSMENTS/INTERVIEW FEEDBACK

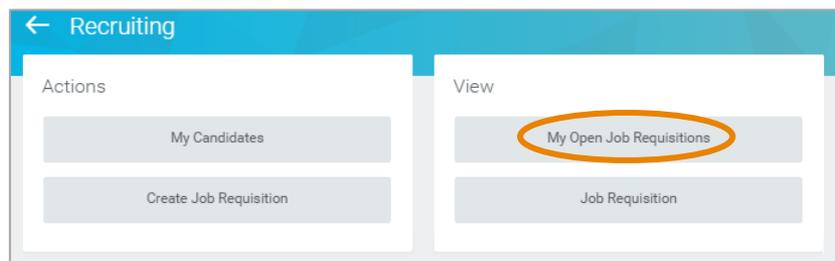
Compare Assessments/
Interview Feedback

Compare assessments and interview feedback across candidates.

1. Log in to Workday
2. Click **Recruiting**



3. Click **My Open Job Requisitions**



Compare Candidates

COMPARE ASSESSMENTS/INTERVIEW FEEDBACK (continued)

Compare Assessments/
Interview Feedback

4. Screen defaults to Manager; change or click **OK**

My Open Job Requisitions

Workday Organization Role *

× Manager

OK Cancel

5. Click the **related actions icon** (“brick”) next to the requisition

My Recruiting Jobs

Job Requisition Status: Frozen, Open

1 item

Job Requisition	Active Candidates	Recruiting Start Date	Hiring Manager	Supervisory Organization	Primary Location	Number of Openings Available	Date Request Entered	Request Completed Date	Target Hire Date	Recruiter
00000010 2500-T4132-DIR QUAL/PERFORM IMPROVE (Open)	1	10/24/2016 - 2 days ago	Matt Manager2 (5100016)	SUPV ORG (Matt Manager2 (5100016))	SFJN - St. Francis Medical Center	1	10/24/2016	10/24/2016	11/28/2016 - 1 month to go	

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

Actions

- Additional Data >
- Compensation >
- Favorite >
- Job Change
- Reporting

Compare Candidate Assessments

Compare Candidate Interview Feedback

1 item

Candidate	# Interviewers	# Completed Interviews	Average Rating
Jamie Jones - PT131049 1000-H1071-CLINICAL NURSE I	2	2	5