Workday Job Aid for Managers

Recruiting Process

Use this to fill an open position.

Job requisition:

Candidate review:

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

Updated as of December 20, 2016

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

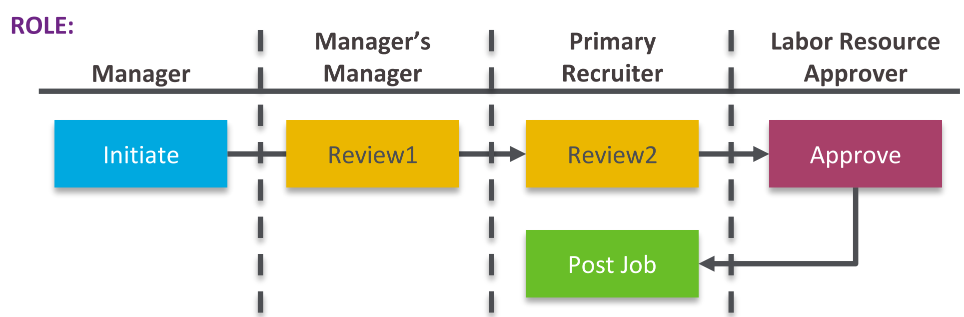
As a manager, you are responsible for initiating the creation of a job requisition. However, you should coordinate with the Recruiter to discuss the requisition, the posting(s), and ongoing candidate activities.

- ❑ **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.

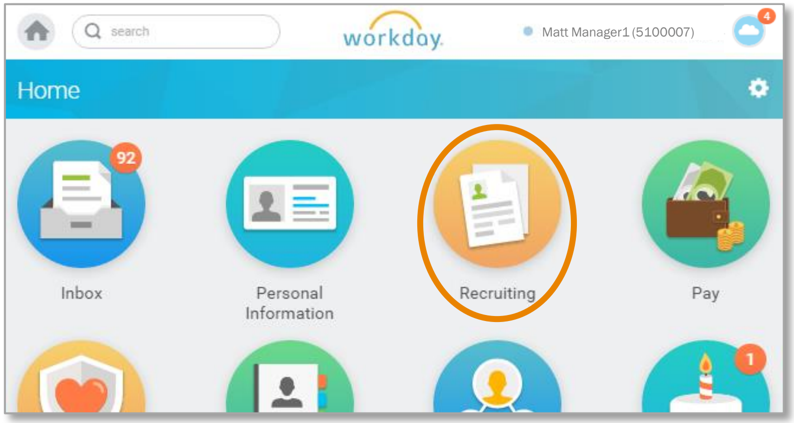
Create Job Requisition

Process Steps

Initiate Job Requisition

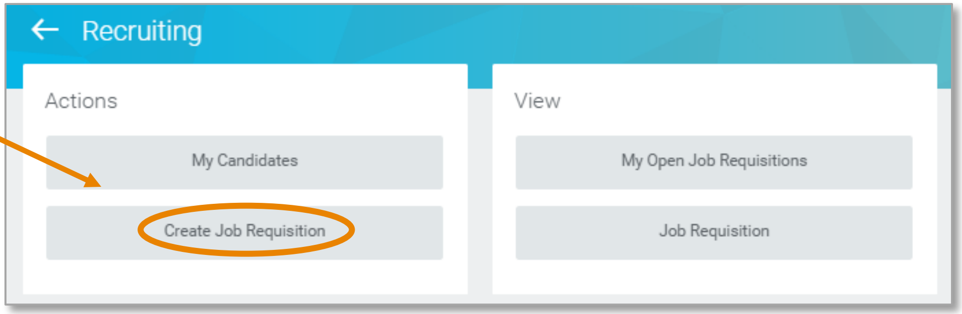
Which role(s) can do this step?
- Manager

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**



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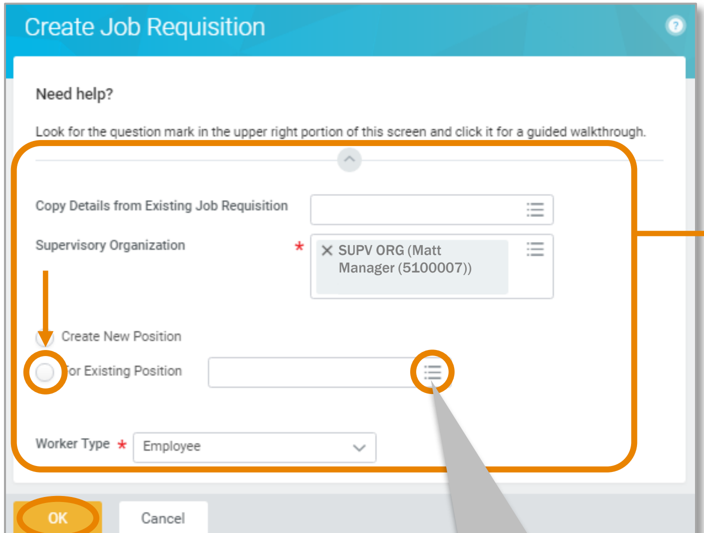
Process Steps (continued)

Initiate Job Requisition

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.

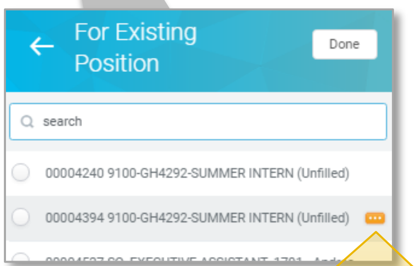
WHAT IS THIS?

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.

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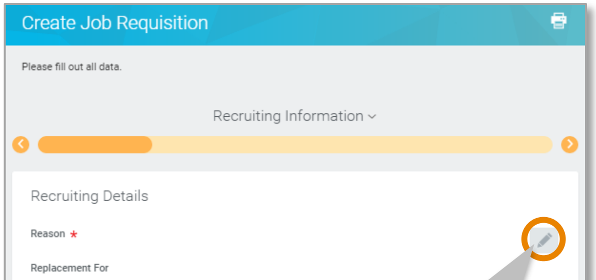
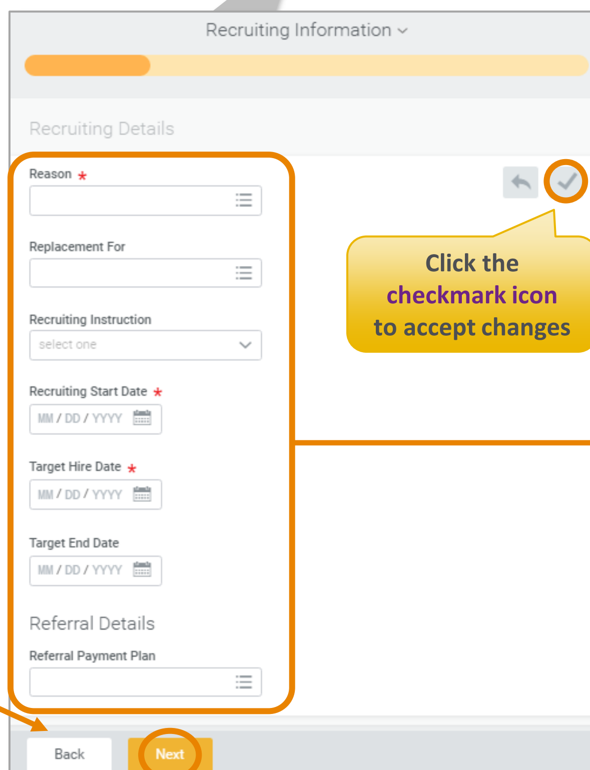
Process Steps (continued)

Initiate Job Requisition

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





Click the **checkmark icon** to accept changes

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

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

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

FUTURE ENHANCEMENT: Leave blank until payment plans are added.

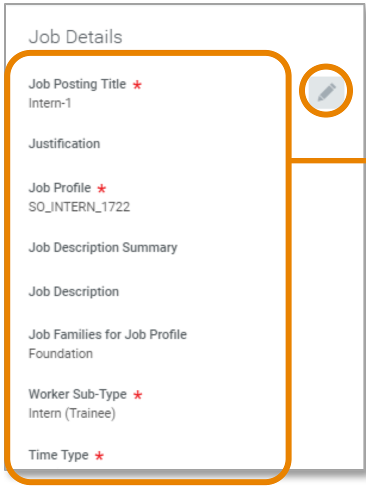
Trinity Health

Create Job Requisition

Process Steps (continued)

Initiate Job Requisition

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



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

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

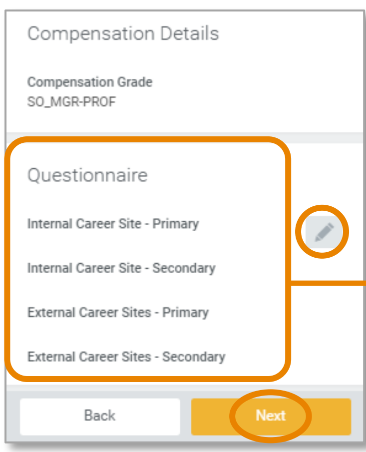
Primary Job Posting Location
Location to list in the job posting
(e.g., Livonia instead of a specific Livonia facility)

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)



WHAT IS THIS?

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.

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

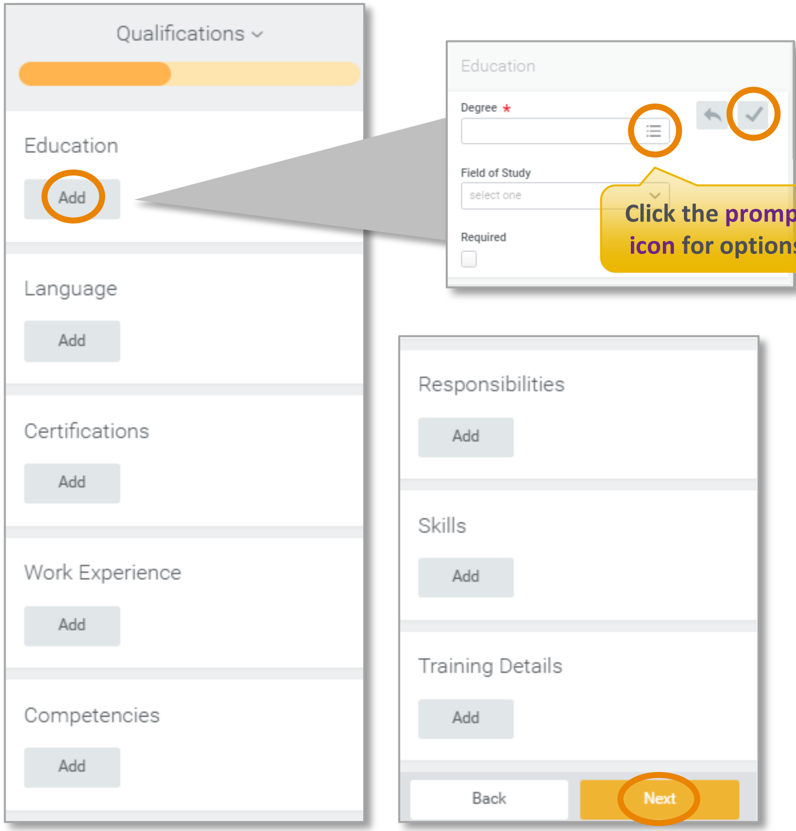
9. Click **Next**

Create Job Requisition

Process Steps (continued)

Initiate Job Requisition

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



Click the **checkmark icon** to accept changes

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

SCREEN CONTINUES IN NEXT COLUMN

11. Click **Next**

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

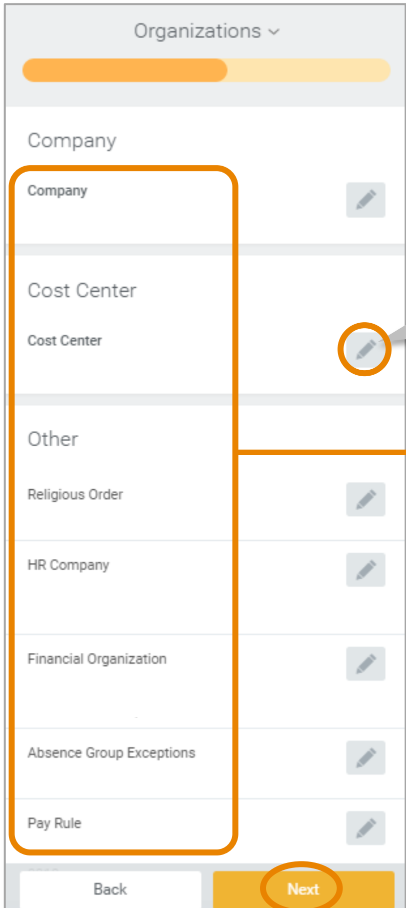
NOTES:
- You may add more than one qualification for each. Complete one, then click **Add** to add another.
- Qualifications can drive analytics, which will allow for greater talent management in the future.

Create Job Requisition

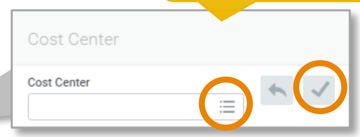
Process Steps (continued)

Initiate Job Requisition

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



Click the **prompt icon** for options



Click the **checkmark icon** to accept changes

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**

Trinity Health

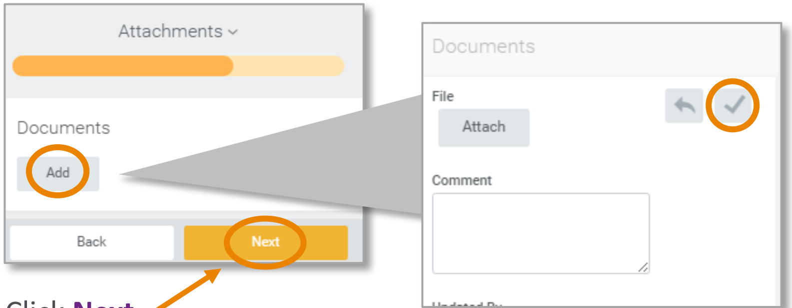
Create Job Requisition

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.



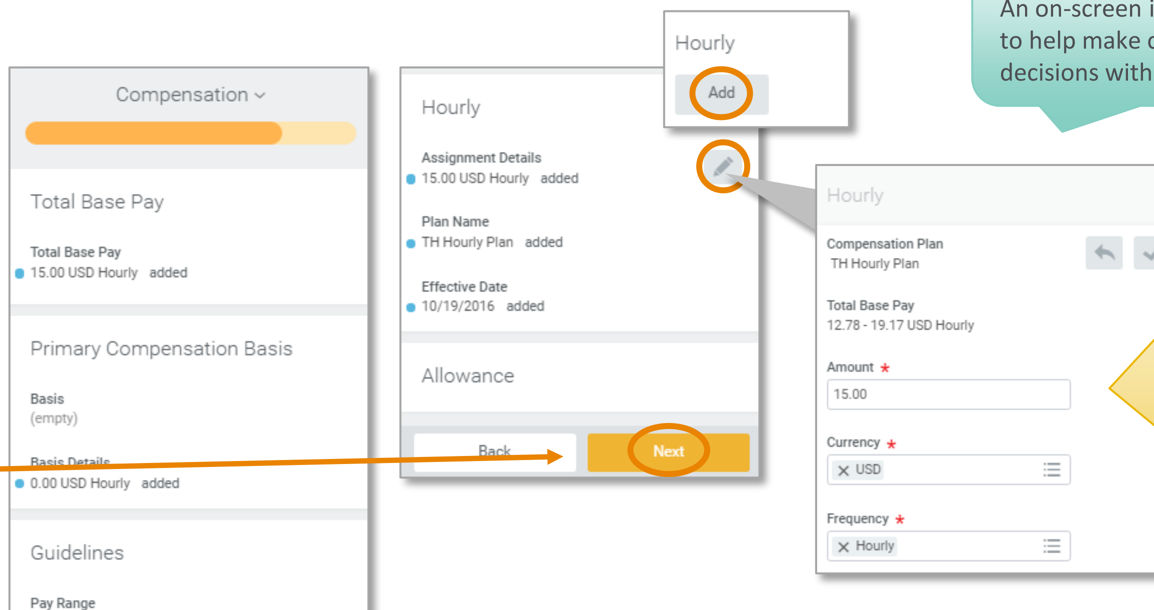
Click the **checkmark icon** to accept changes

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

17. Click **Next**



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.

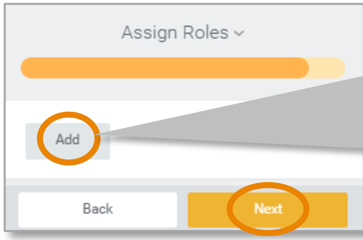
SCREEN CONTINUES IN NEXT COLUMN

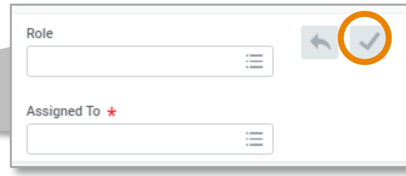
Trinity Health

Process Steps (continued)

Initiate Job Requisition

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





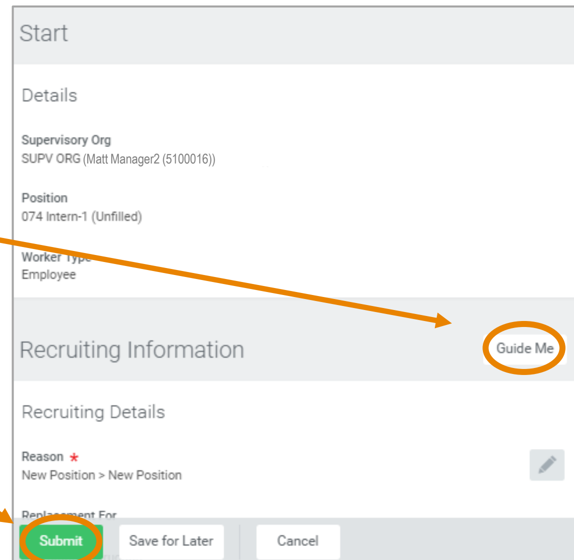
Click the **checkmark icon** to accept changes

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

Trinity Health

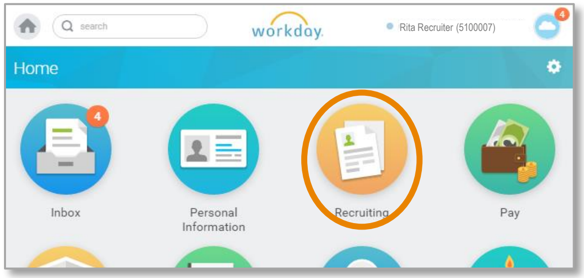
VIEW JOB REQUISITION CHANGE HISTORY

Additional Actions – Job Requisition

View Job Requisition Change History

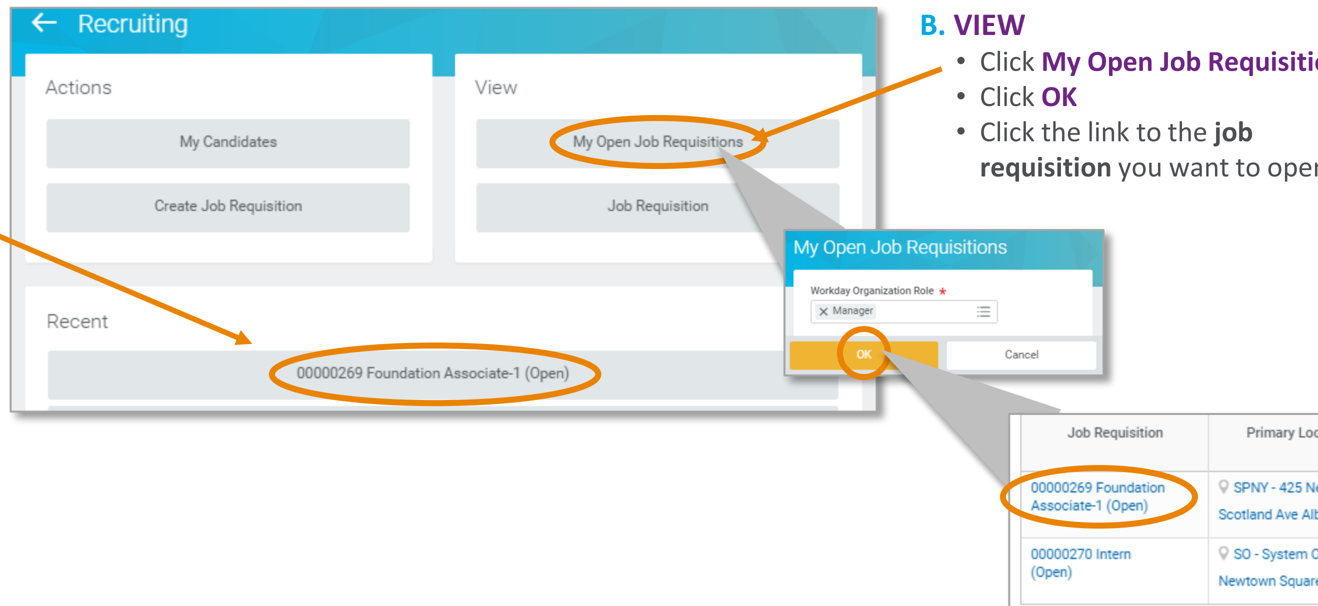
NOTE: You can only view change history if a change has been made to the job requisition.

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

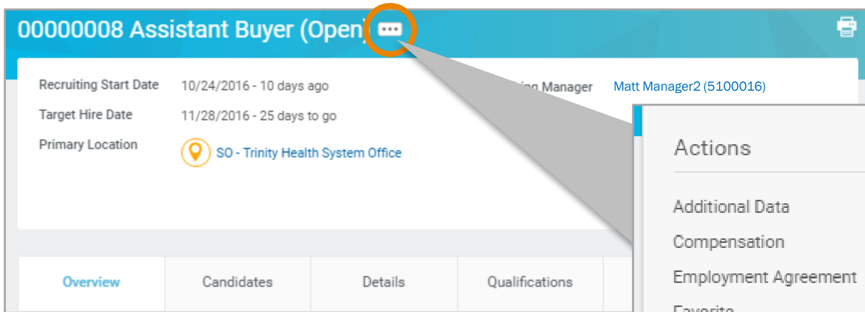
Job Requisition — Additional Actions

Additional Actions – Job Requisition

View Job Requisition Change History

VIEW JOB REQUISITION CHANGE HISTORY *(continued)*

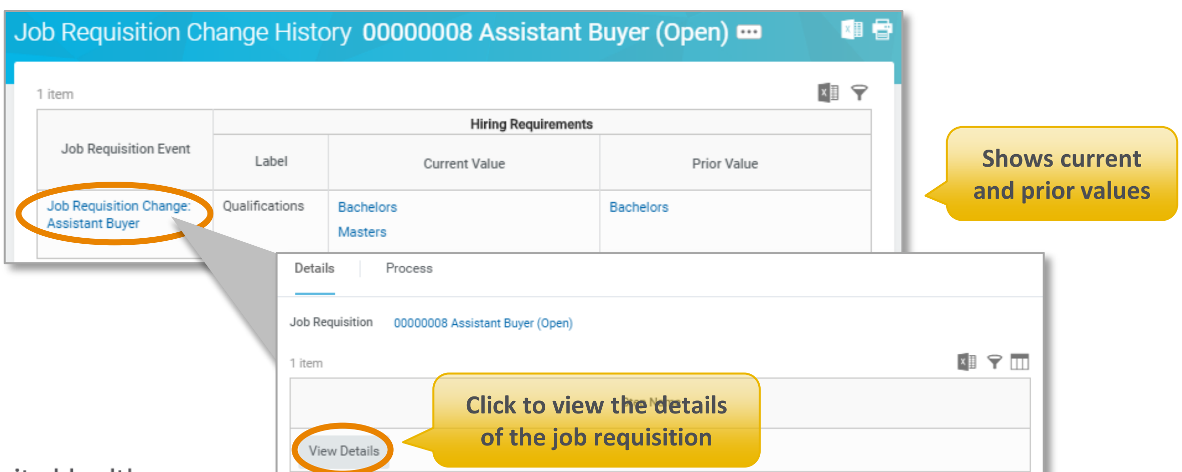
4. Click the **related actions icon ("brick")** next to your existing job requisition



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

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

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



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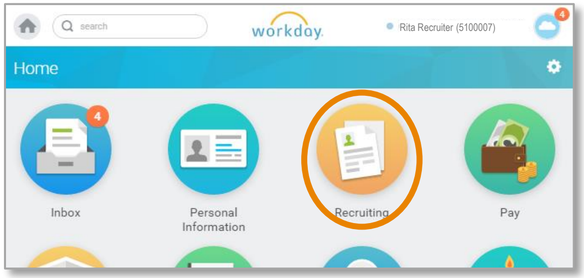
Additional Actions – Job Requisition

View Job Posting Details

VIEW JOB POSTING DETAILS

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



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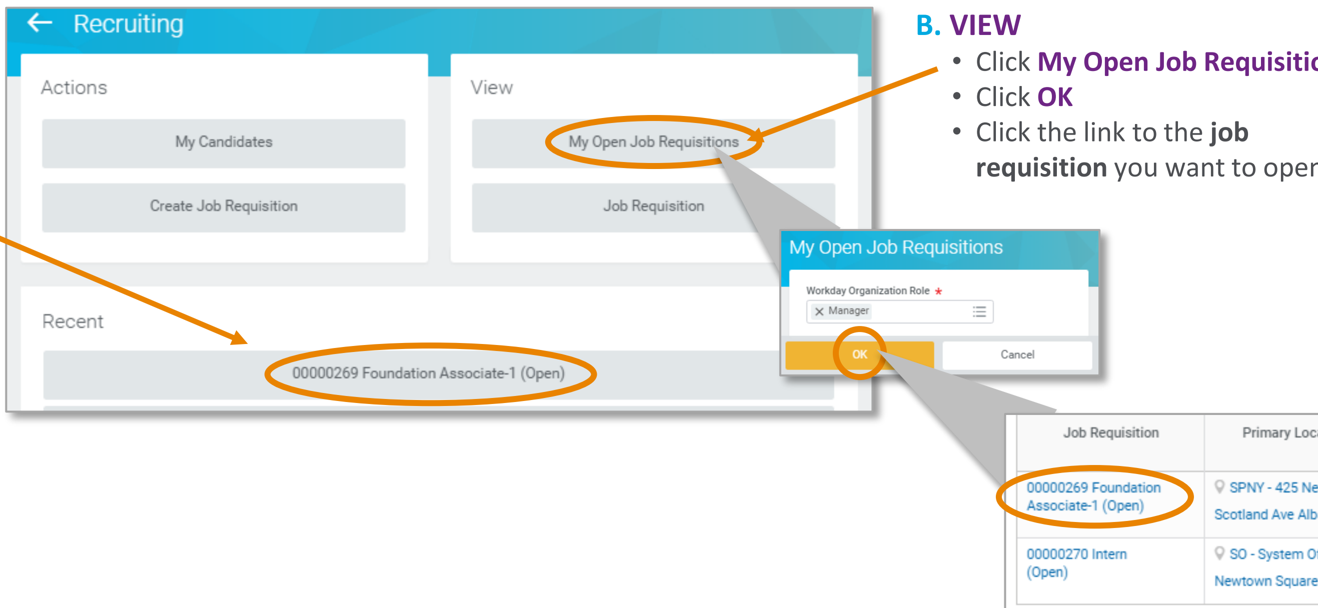
If your job requisition is recent, it may show up under Recent. Click the **job requisition** to move forward.



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

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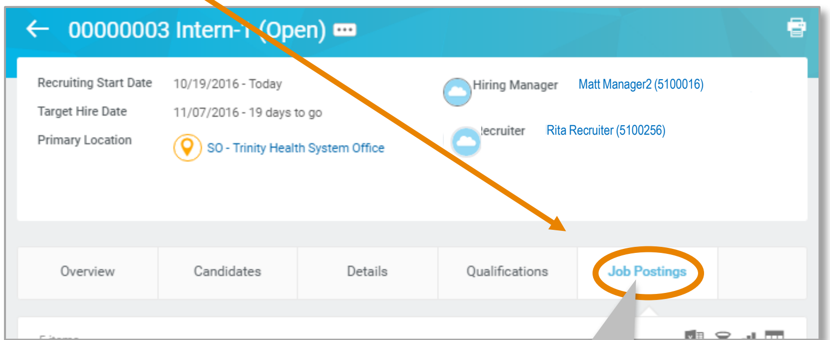
Additional Actions – Job Posting

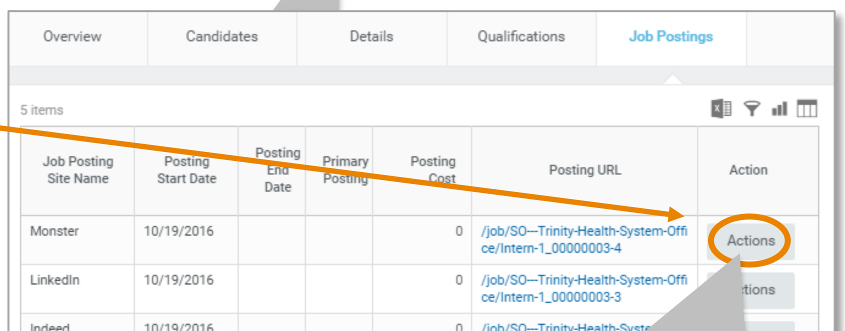
View Job Posting Details

VIEW JOB POSTING DETAILS *(continued)*

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.

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

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.

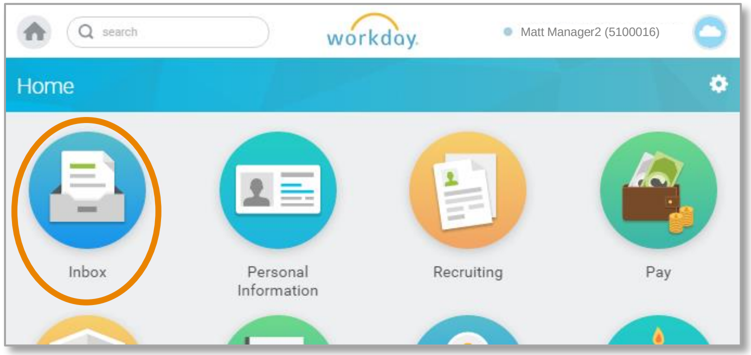
Candidate Screening

MANAGER PHONE SCREENING

Manager Phone Screening

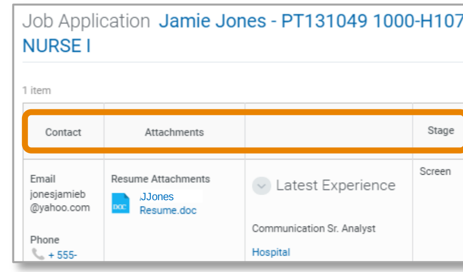
The Recruiter will move a candidate forward to you for phone screening.

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

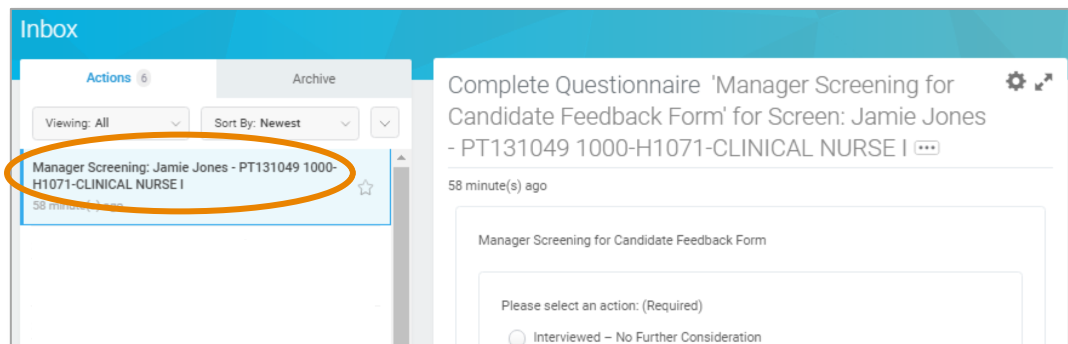


To find candidate's contact and other information:

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)

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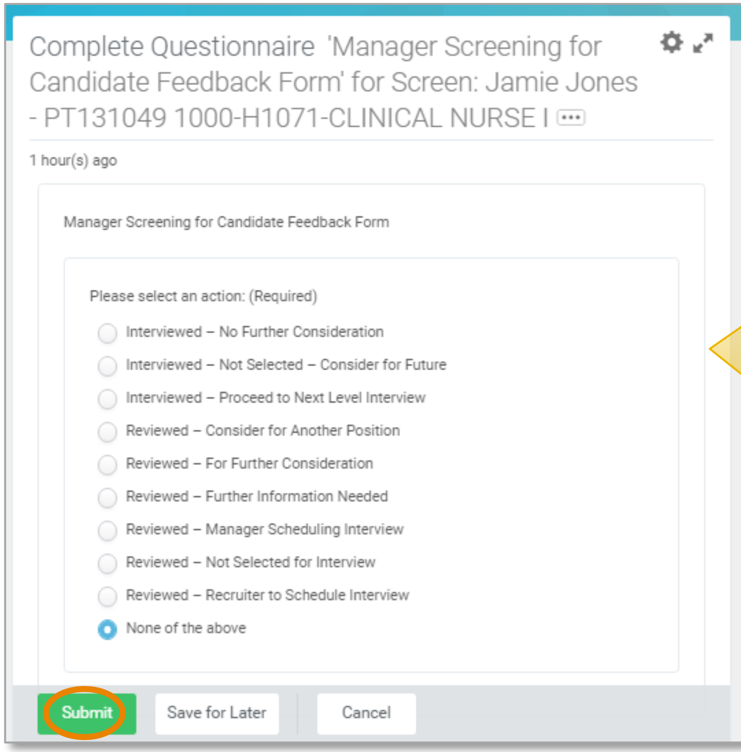
MANAGER PHONE SCREENING *(continued)*

Manager Phone Screening

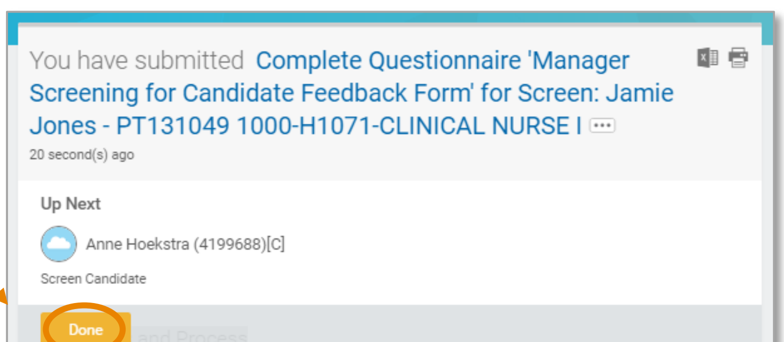
5. When screening is complete, click your feedback/direction choice



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**



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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
❑ 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

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

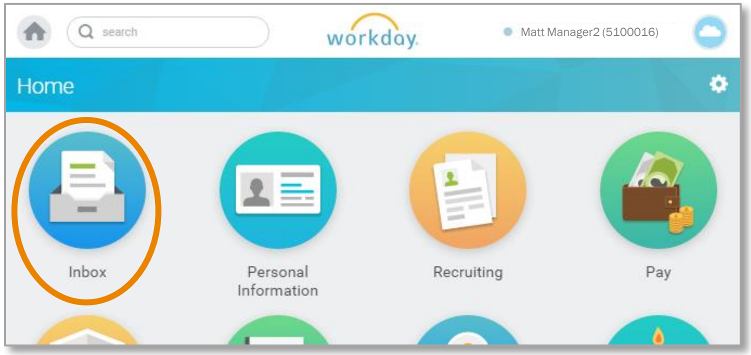
- Contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org.

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.

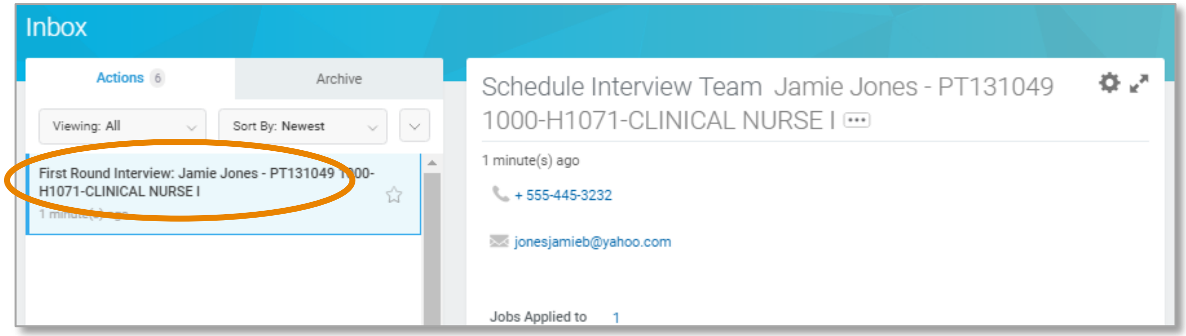
SCHEDULE INTERVIEW TEAM

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**

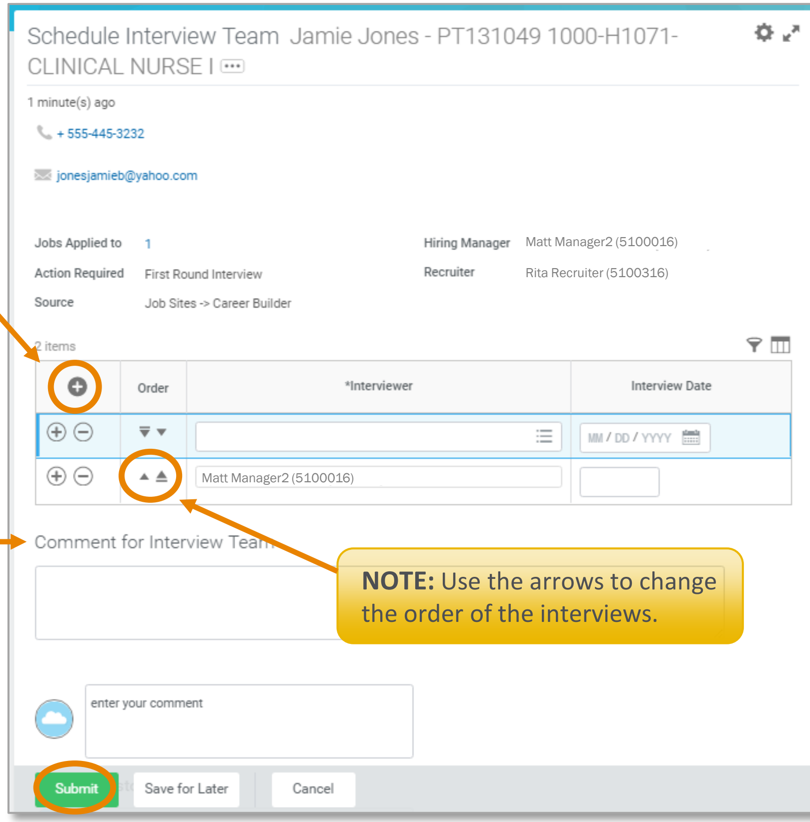


3. Find the email and click to open *(opens in the right pane of the screen)*



SCHEDULE INTERVIEW TEAM *(continued)*

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



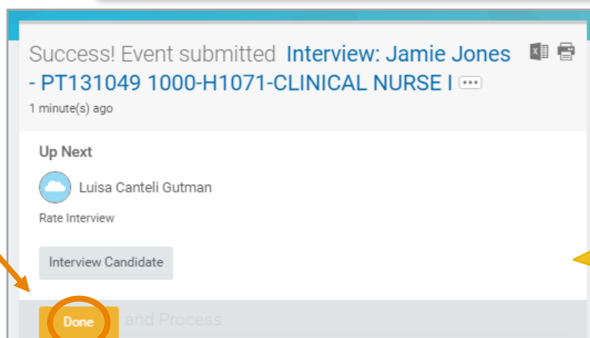
NOTE: Currently Workday does not integrate with your calendar. You will need to add interview appointments to your calendar separately.

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

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

6. Click **Submit**

7. Click **Done**



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

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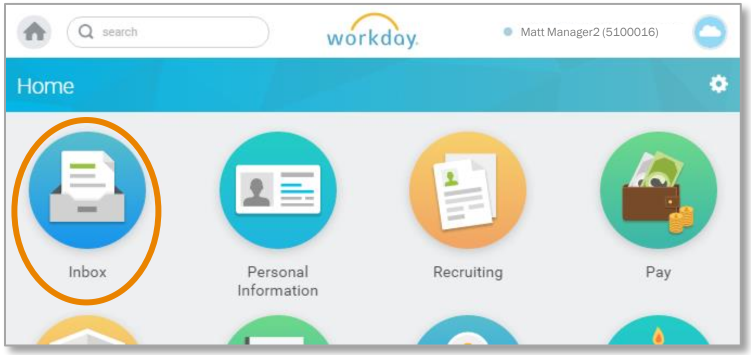
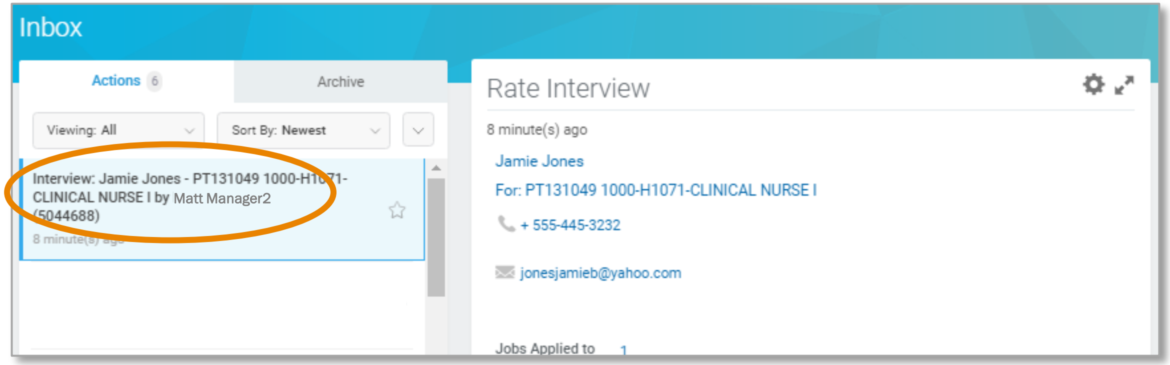
RATE INTERVIEW

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

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

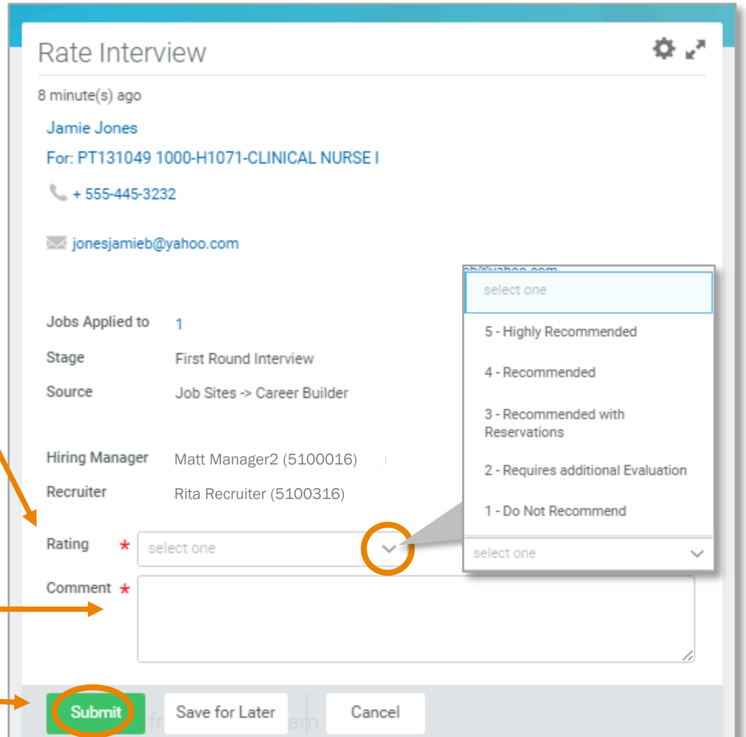


3. Find the email and click to open
   (opens in the right pane of the screen)

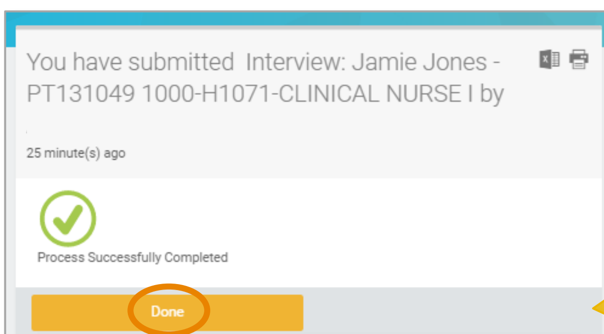


RATE INTERVIEW *(continued)*

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.

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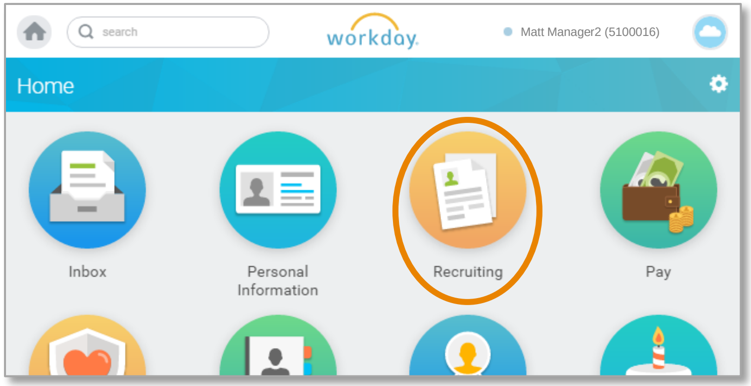
Compare Candidates

COMPARE ASSESSMENTS/INTERVIEW FEEDBACK

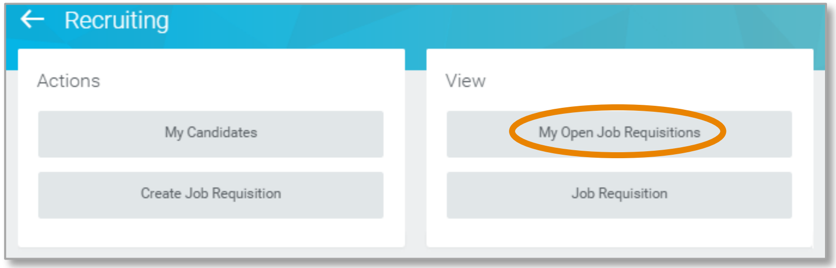
Compare Assessments/ Interview Feedback

Compare assessments and interview feedback across candidates.

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



3. Click **My Open Job Requisitions**



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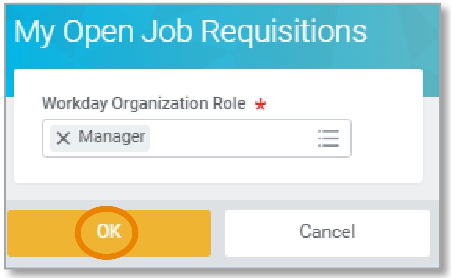
Compare Candidates

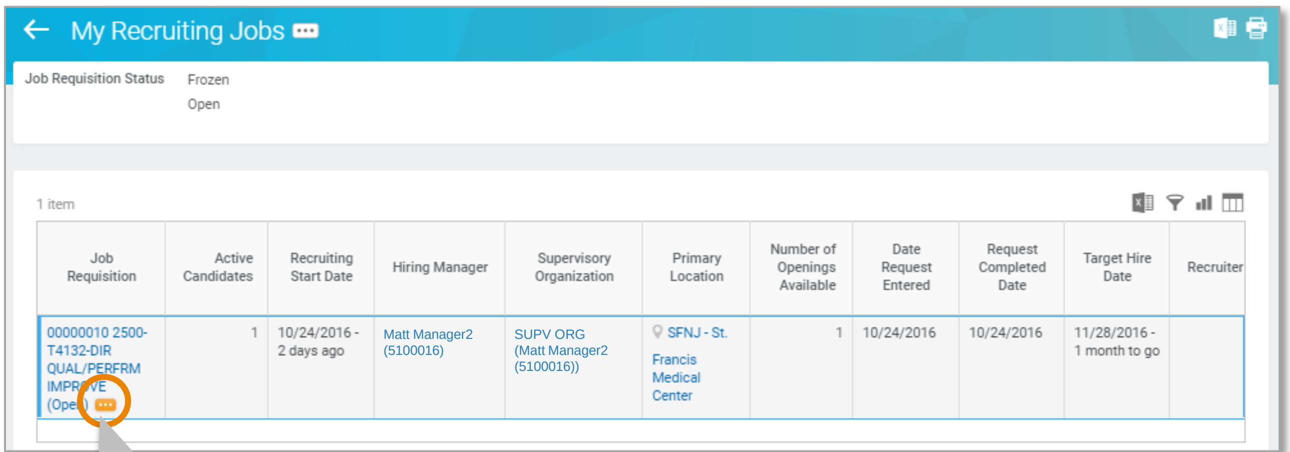
COMPARE ASSESSMENTS/INTERVIEW FEEDBACK *(continued)*

Compare Assessments/ Interview Feedback

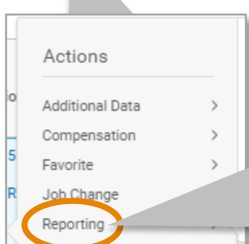
4. Screen defaults to Manager; change or click **OK**

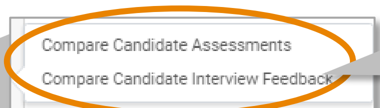


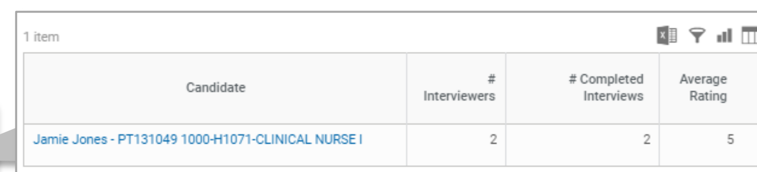
5. Click the **related actions icon ("brick")** next to the requisition



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







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