Recruiting Process Stage by Stage

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From the **Candidates** tab of your open job requisition, you can view a list of applicants and their current stage in the recruiting process. You can advance or decline candidates from here. **After the first stage, you should manage the recruitment process from your Workday inbox instead.**

As you move a candidate through each recruiting stage, relevant history/details will become available from the Concept: Candidate Profile.

Read more about each of the recruiting stages (in order) below.

Review

All new applicants start in the **Review** stage, but you can advance qualified applicants on to the **Screen** stage.

Advance Candidate(s) from ***Review*** to ***Screen***

1) Go to an open/unfilled job requisition. You can find them from the **Recruiting** worklet or by running the **My Open Job Requisitions** report.

2) Click the **Candidates** tab to see the list of current applicants. The number of candidates in each recruiting stage displays above the applicant list.

3) Click the **Review** label to filter to candidates in that stage.

4) Review each candidate's application (see Concept: Candidate Profile for details).

5) Advance any qualified candidates:

- Click the **Move Forward** button from the candidate's profile.
- For any qualified candidate, check the box in the leftmost column of the **Candidates** table, then click the **Move Forward** button.

- See [Advance, Decline, or Email Job Candidates] for detail and additional options.

6) Once you move a candidate forward, **you should manage the remaining recruiting steps from your Workday inbox**.

Note: There is no Workday notification in your inbox when new candidates apply, so please regularly check your open job requisitions for new applications.

Screen the Candidate

The **Manager Phone Screen** step is the opportunity to connect with the candidate. For information about CCA's phone interview practice, connect with your HR Lead.

Manager Phone Screen Inbox Task

Look for the **Manager Phone Screen** task in your Workday inbox. Essentially, since the screening itself happens offline, this task simply displays the candidate's profile.

Click one of the following to complete the task:

- **Move Forward** > **Interview**: Advance the candidate to the next stage.
- **Move Forward** > **Potential Candidate - Hold**: Keep the candidate in the same stage and in a "holding" pattern so you can revisit the application at a later time.
- **Decline** > **Decline Reason:** Send the candidate an automated rejection email after a three day delay.

Interview the Candidate

During the **Interview** stage, you can elect other employees as members of the interview team to meet with and rate the candidate. This stage involves three different inbox tasks. For guidance on the interview process, connect with your HR Lead.

1 - ***Schedule Interview*** Inbox Task

Look for the **Schedule Interview** task in your Workday inbox. Use the table to add interviewers and interview dates. You will appear there by default.

1. Click the **plus icon** to add a new row.
2. Click the **Interviewer** dropdown, then select someone for your interview team.
3. Set a date for the interview. Interview teams generally meet with a candidate all at one time, but the **Interview Date** can vary based on interviewer availability.
4. Click **Submit** when complete.

2 - ***Rate Interview*** Inbox Task

After you submit the **Schedule Interview** task, you and the other interview team members will receive a **Rate Interview** inbox task. Use this task to capture feedback about the candidate, assigning a numerical **Rating** and providing further assessment in the **Comment** box. Click **Submit** when complete.

3 - ***Interview Decision*** Inbox Task (***Advance***, ***Decline***, or ***Repeat***)

At the same time that you receive the **Rate Interview** task, you'll also receive an **Interview** inbox item prompting you to advance or decline the candidate.

Click one of the following to complete the task:

- **Move Forward** > **Interview**: Repeat the interview stage to add new interviewers or schedule a second session (you'll receive the **Schedule Interview** task once again)
- **Move Forward** > **Potential Candidate - Hold**: Revert the candidate to the **Screen** stage and keep the candidate in a "holding" pattern so you can revisit the application at a later time.
- **Move Forward** > **Check Professional References**: Move the candidate to the next stage.
- **Decline** > **Decline Reason:** Send the candidate an automated rejection email.

If you're recruiting for a student position, you can only advance the candidate to the **Ready for Hire** step from here or return them to the **Screen** stage (by clicking **Potential Candidate - Hold**).

Check Professional References

Call (or otherwise contact) a candidate’s listed references, then connect with HR about presenting the candidate with an offer. For guidance on reference check questions, connect with your HR Lead.

Check Professional References Inbox Task

Click one of the following to complete the **Check Professional References** task:

- **Move Forward** > **Offer**: Move the candidate to the next stage.
- **Move Forward** > **Potential Candidate - Hold**: Revert the candidate to the **Screen** stage and keep the candidate in a “holding” pattern so you can revisit the application at a later time.
- **Decline** > **Decline Reason**: Send the candidate an automated rejection email.

If you’re advancing a candidate for a student position, you’ll skip right to the **Ready for Hire** step instead.

Confirm Offer Details

Before an offer is made to the candidate, HR reviews the offer you submit in the **Initiate Offer** inbox task. Offers greater than $5000 over the position default compensation (submitted when the position was created), require approval by the HR VP and Department VP.

If the offer compensation is approved, HR will send the candidate their offer letter and job description for review.

Initiate Offer Inbox Task

Within the **Initiate Offer** task, update all required fields, advancing through the screens as needed. Click the **pencil icon** next to any section to make fields editable.

1) Update the **Hire Date**, which must be after the **Target Hire Date** given on the job requisition.

2) Click **Next** to proceed to the **Compensation** tab.

3) Click the **Add** button for either the **Salary** or **Hourly** section, based on how the position is compensated. Do not guess on this.

- You can see whether a job is salaried or hourly: run the **Job Profile** report and view the **Pay Rate Type** tab. Please connect with HR if you have further questions.

4) Under **Compensation Plan**, browse **All Compensation Plans**, then select **Hourly Plan** or **General Salary Plan** as appropriate.

5) Under **Amount**, enter the desired compensation for this position.

- This number must fall within the **Total Base Pay Range** shown.
- This compensation range is established by the **Job Profile**. Connect with HR if you have any questions.

6) If a cell phone allowance is applicable for this position, click the **Add** button in the **Allowance** section and enter the appropriate details.

Allowance plans must be approved by Human Resources.
See CCA's cell phone policy for additional details.

7) Click **Next** to proceed to the **Summary** screen.

8) Review all information, then click **Submit** to route the offer to Human Resources for approval.

The approved offer is sent to the candidate for review and approval:

- **External Candidates** must accept the offer and job description from the candidate portal before proceeding with next steps, like background checks or processing the hire.
- **Internal Candidates (Current CCA Employees)** must accept the offer from their Workday inbox before proceeding with next steps.

Make Offer Decision Inbox Task

- Click one of the following to complete the **Make Offer Decision** inbox task:
- **Move Forward** > **Offer**: If you need to revise your initial offer, select this option to receive the **Initiate Offer** task once again.
- **Move Forward** > **Potential Candidate - Hold**: Revert the candidate to the **Screen** stage and keep the candidate in a “holding” pattern so you can revisit the application at a later time.
- **Move Forward** > **Background Check**: If a background check is appropriate for the position, select this step to advance the candidate.
- **Move Forward** > **Ready for Hire**: If no background check is necessary, you can advance the candidate to this final stage, which kicks off the processing phase of the hire.
- **Decline** > **Decline Reason**: Send the candidate an automated rejection email.

If you’re advancing a candidate for a student position, you’ll skip right to the **Ready for Hire** step instead.

Background Check

Human Resources orders additional background checks for certain positions as appropriate. Connect with your HR Lead if you are not sure if your position requires the completion of a background check.

Ready for Hire (and What's Up Next)

Once a candidate has accepted an offer and cleared any required background checks, you can advance them to the **Ready for Hire** stage. When you do so, several things will happen:

1) You will not be able to advance any other candidates who have applied for the job unless the requisition has multiple openings.

2) A new "pre-hire" profile will be created for the selected candidate.

3) The hiring manager will receive one of the following inbox tasks:

- **Hire -** External candidates (not currently employed by CCA). Read [Concept: Processing a New Hire] for instructions on completing this task.
- **Change Job** - Internal candidates (currently employed by CCA). Follow the [Manage Job Changes] guide for instructions on completing this task.