Workday Webinar: Recruitment - Hiring Through a Job Posting

Danielle Pannu, Functional Support Analyst, ISC

Ashley Bloor, HR Functional Analyst, ISC

Linda Fischer, Executive Director Advisory Partnerships & Professional Standards

Anton de Bruyn, Senior HR Associate, Central HR

Janna Fisk, Human Resources Advisor, UBCO HR

Manveen Maadhra, HR Associate, UBCO HR

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Note: This presentation has been updated to include the speaking notes used in the event. We hope this is helpful for those unable to attend.

Workday Webinar: Recruitment Hiring Through a Job Posting

This is intermediate training as we won’t be going over recruitment basics here, it’s about the next level questions that come up after you’ve had experience with creating a job requisition, posting positions, and hiring through recruitment.

When it comes to your questions today, we do ask that they are specific to the points covered so that we really get the most out of focusing our efforts. And as a reminder, if your question is too specific, we may ask you to submit a ticket or contact your department HR or advisory representative instead to get the answer that you need.

Today’s session will have a lot of information as we have read all your posted questions via slido. We are covering a lot of content and will likely go over the hour as part of our presentation – we want to ensure we are addressing your questions live as best we can. If you aren’t able to stay for the full hour and a half, this session is being recorded and will be posted for future reference.

Just in case we don’t cover all the content today, we have added additional slides to this deck as an appendix, with our notes on the slide, which will be also available as a resource following this session.

Who Do I Go to for Help?

ISC

I need to process a retroactive hire, but another department has already hired the employee…

Why am I getting this weird error?

I need to make a change to an offer letter, how do I edit it?

Why does this employee's EEID start with an "E"?

HR

What type of transaction do I need to submit?

What action reason do I use?

Do I need to re-post?

Can I add this text to the offer letter?

Practice & Policies

Who Do I Go to for Help?

The ISC and UBC HR have partnered on the content of today's session as many of the questions are a result of both UBC Policy/Practices and Workday Functionality mixed together.

By collaborating on these sessions, we hope to ensure that you gain a better understanding of how UBC policies/practices have been configured in Workday and know who to reach out to if you have any issues – whether it be to your department HR or advisory rep directly, or through submitting a Workday support request.

Often the answers to your questions require advice from both your department HR or advisory rep and an ISC Team member, so today we will be able to give you that information all together as opposed to you directing your questions to two different places. This will ensure a consistent approach across the University.

Today's Focus

To build on the basic understanding of recruitment hiring and to troubleshoot recruitment issues

- Recruitment specific security roles
- Editing the job requisition
- Understanding the impact of retroactive start dates
- Avoiding duplicate records
- Recruitment Candidate Guide
- Corrections to the Employment Agreement
- Workday notifications sent to candidates

Recruitment Specific Security Roles

Recruitment Security Roles

Definitions

Hiring Manager

Primary Recruiter

Search Committee Member

Recruitment Security Roles

There are 3 recruitment specific security roles.

Hiring Manager

- Assigned to the manager of the supervisory organization that the position sits in
- Automatically has access to the job requisition and candidate applications without being assigned the Primary Recruiter security role
- Has access to the Recruitment application under “View All Apps” on the homepage
- Not a role that has to be assigned, it’s automatically assigned when a job requisition is created for a position, because the manager is already there assigned to the sup org.

Primary Recruiter

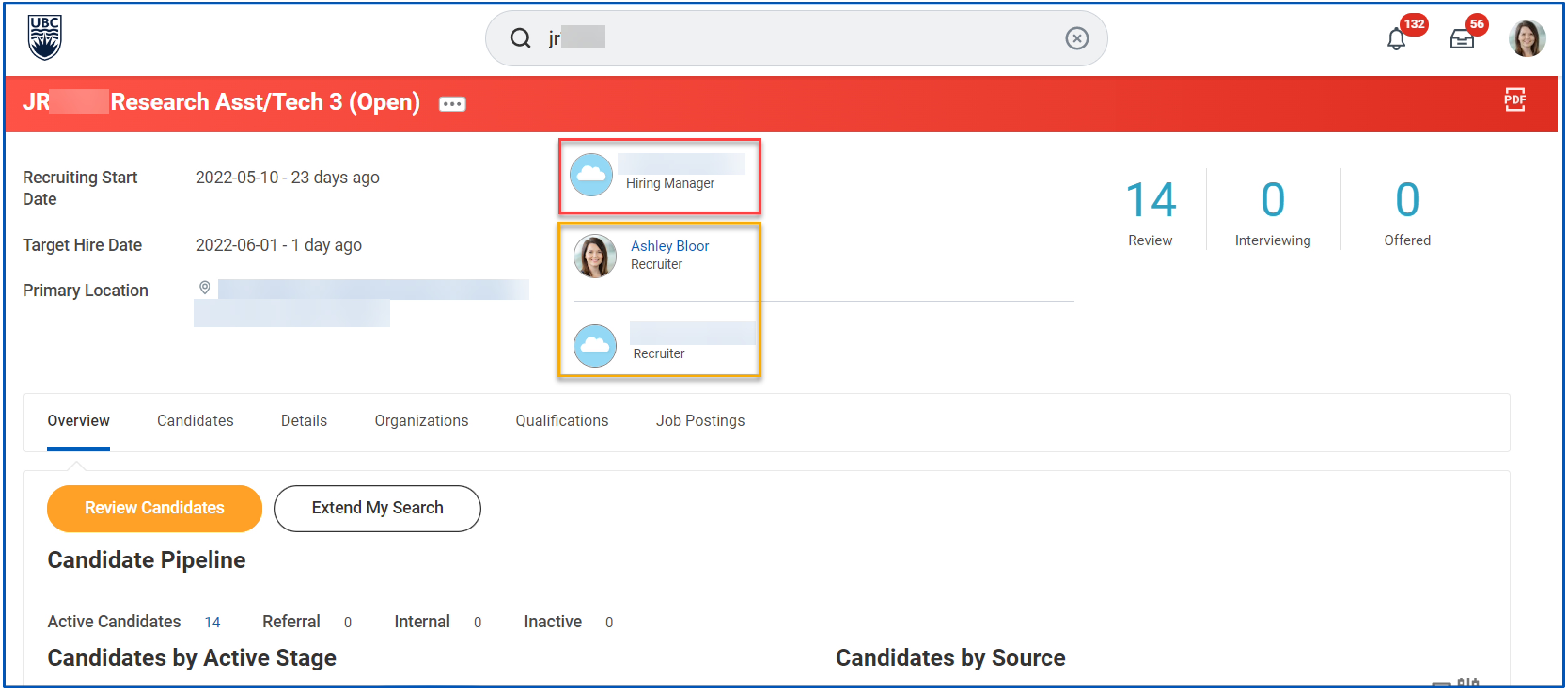
- Assigned to the person responsible for managing candidates and submitting recruitment processes in Workday
- Assigned by the person initiating the job requisition, you must always have a primary recruiter assigned or else no one will be able to move the candidates forward.
- Has access to the Recruitment app under “View All Apps” on the homepage to manage job requisitions.

Search Committee Member

- Assigned to the individuals participating in the search committee
- Has “view only” access to the job requisition and candidate applications
- If the individual assigned this role does not have any other HR security roles, they will NOT have access to the Recruitment application under “View All Apps” on the homepage based on this security role alone
- Must be told the JR number and search for it in the Global Search to access the requisition and candidate list

Recruitment Security Roles

On the Job Requisition



Recruitment Security Roles

On the Job Requisition

On the job requisition you can see who the hiring manager is and who the Primary Recruiters are. It only says recruiter here, but it is the Primary Recruiter role that these people have. The Search Committee Members are not visible on the job requisition summary.

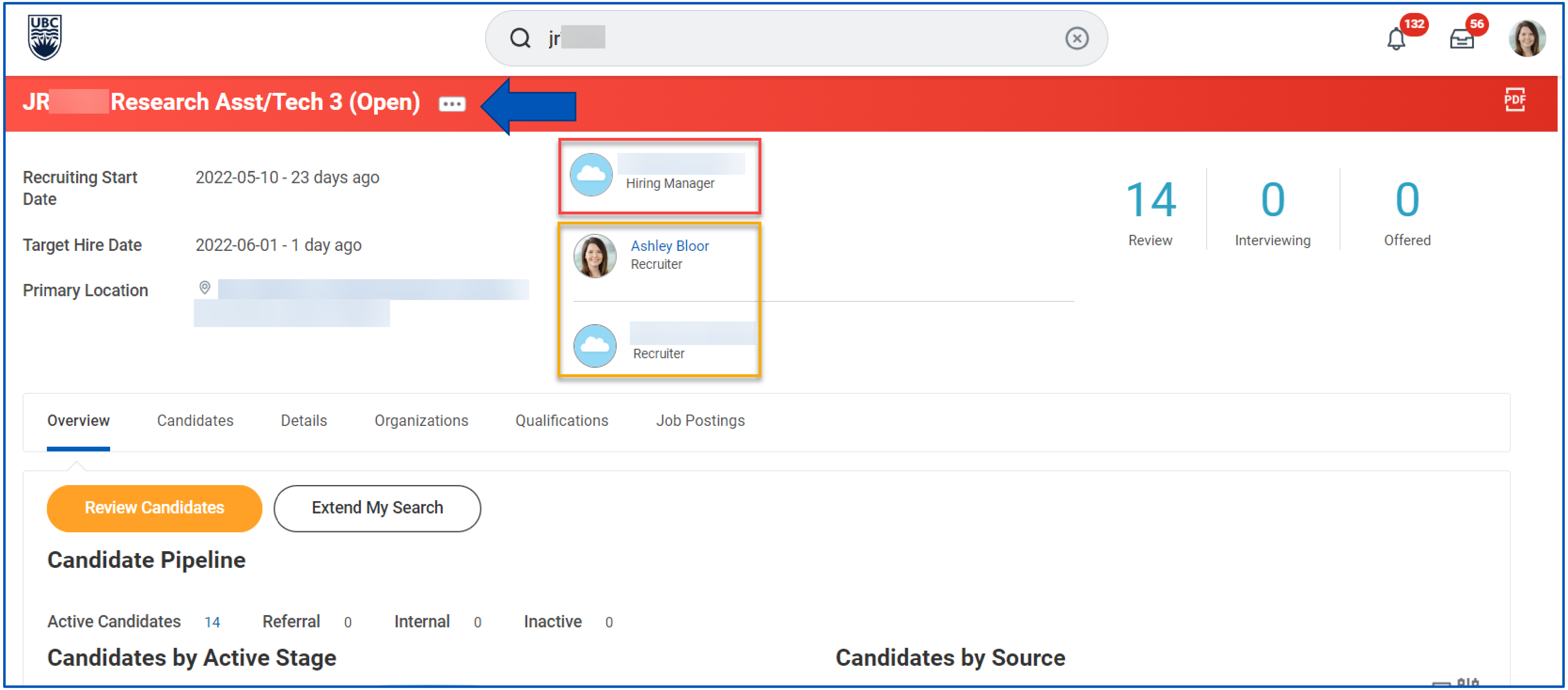
As this example shows, you can have multiple Primary Recruiters assigned to the same job requisition, but there is one major impact of doing so: **All of the Primary Recruiters will receive tasks in their inbox related to the job requisition.** Only one needs to complete it, for it to be removed, but everyone will receive the tasks.

If you want to assign someone access to view applications, but not receive tasks, you should give them the Search Committee member role.

Also, just a reminder that the manager does not need the primary recruiter role assigned to them, unless they are actually going to be the person that submits the recruitment tasks. Otherwise, they have access to the job requisition and candidate applications just based on their hiring manager role.

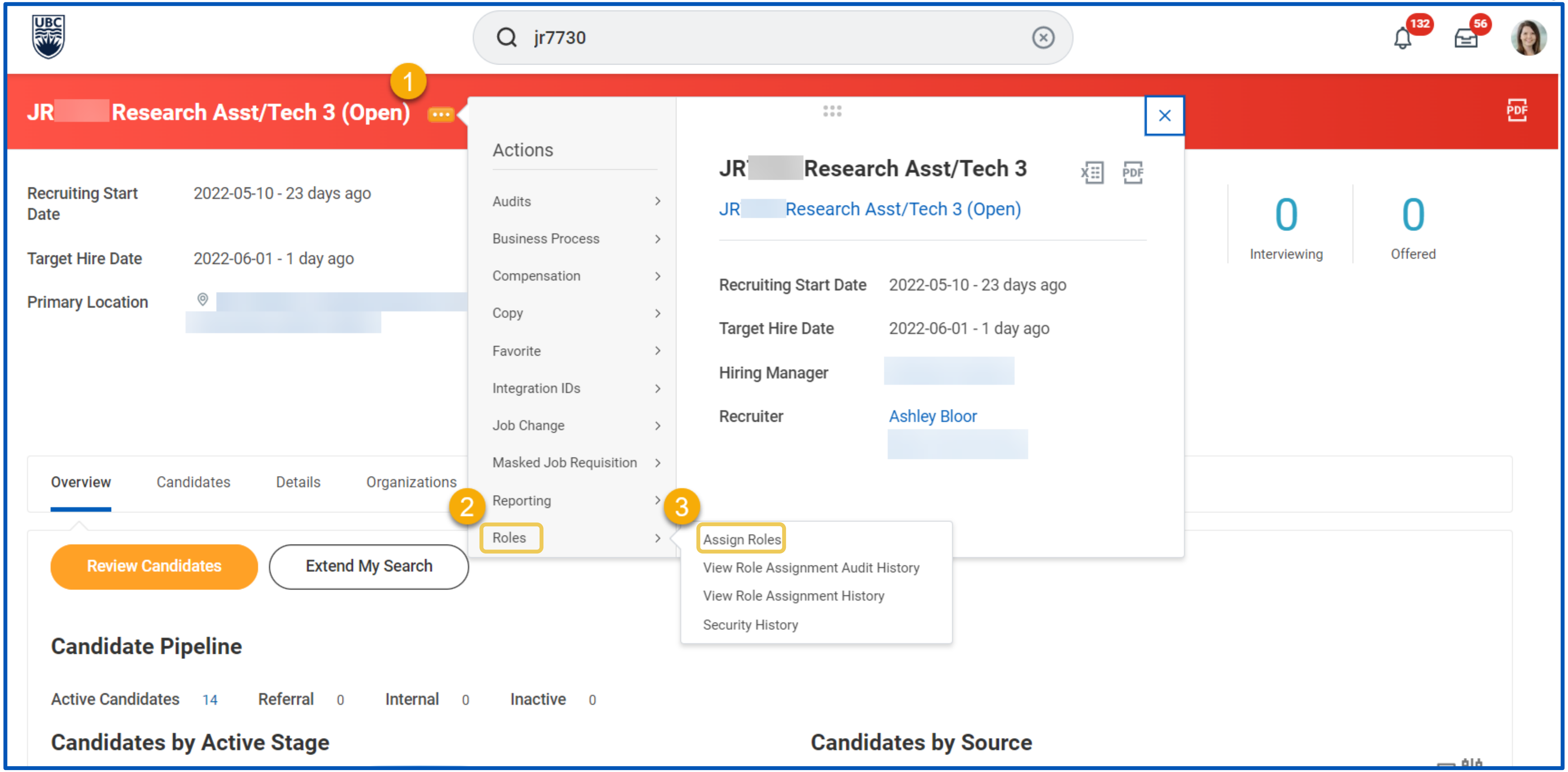
Recruitment Security Roles

To assign a recruitment security role or change the current assignments, click on the related actions button next to the job requisition title.



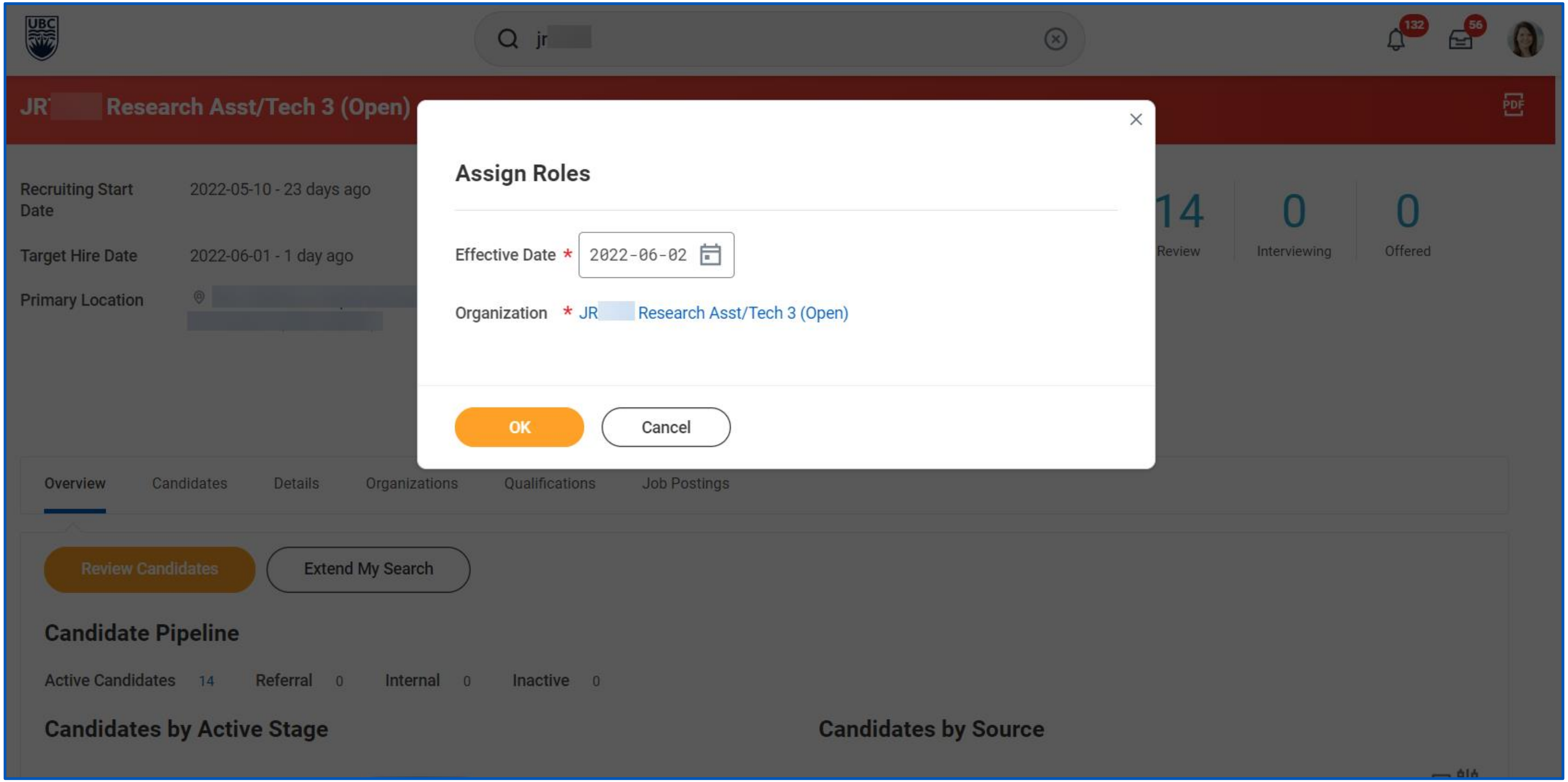
Recruitment Security Roles

Go to Roles and Assign Roles.



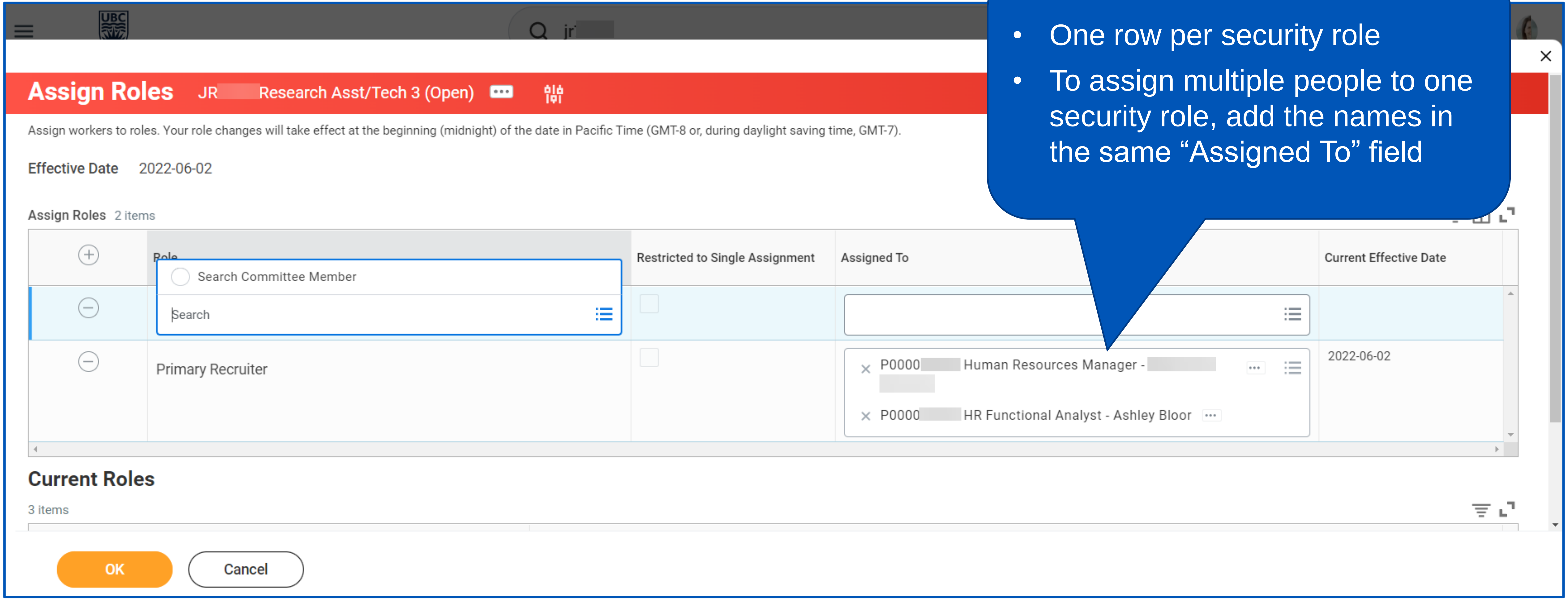
Recruitment Security Roles

Click OK on the Effective Date page.



Recruitment Security Roles

Assigning/Updating Recruitment Security Roles



- One row per security role
- To assign multiple people to one security role, add the names in the same “Assigned To” field

Recruitment Security Roles

Assigning/Updating Recruitment Security Roles

Click on the Plus icon on the top left to add an additional line in order to add the Search Committee member role. Then you would just search for the name in assigned to box.

The first thing to note is that there should only be one row per security role. If you are assigning multiple people to the same security role, then all of the names go in the same box under the “Assigned To” column.

To remove access, you click on the “X” next to the person’s name. If you want to remove all Search Committee Member’s at once, you can click on the minus sign for that row. You should always have a Primary Recruiter assigned to a job requisition or else the recruitment tasks will go unassigned and no one will be able to submit the recruitment transactions for the successful candidate. So if you have a Primary Recruiter assigned but they leave that role, you will need to assign a new primary recruiter using this method.

Editing the Job Requisition

Editing the Job Requisition

Edit the job requisition allows you to go back into the details of your job req and update a specific detail. There are different times and different purposes for editing during the recruitment process.

In the beginning of the recruiting process, editing the job requisition allows you to change details on the job requisition and the job posting to make sure you are advertising the correct details to your potential candidates. These type of edits apply to all positions and job requisitions at UBC, for faculty, staff and student.

Towards the end of the recruitment process, editing the job requisition allows you to make sure the position details match the employment details negotiated with the successful candidate, before you move your candidate to the employment agreement stage.

That's the important piece, **to avoid errors, you have to edit the job requisition *before* you move the candidate to the employment agreement stage** in order for those new details to take effect.

Because these types of edits impact the employment agreement, they only apply to staff and student positions. Faculty, on the other hand, have their employment agreements directly uploaded to Workday so these kinds of edits would not be necessary.

Editing the Job Requisition

Can Edit

- Recruiting Start Date
- Target Hire Date
- Target End Date
- Job Posting Title
- Additional Job Description
- Time Type
- Worker Sub-Type (*term or ongoing*)
- Primary Location
- Primary Job Posting Location (*Vancouver vs Okanagan campus*)

Cannot Edit

- Job Profile (*hourly or salary*)
- Job Description

- Cannot Edit Position Restrictions while a job requisition is open
- To change the job profile/job description:
  1. Close the Job Requisition
  2. Edit Position Restrictions
  3. Create a new job requisition to post or use the direct hire/add job/change job to complete the hire

Editing the Job Requisition

It’s also important to note that not everything can be edited in the job requisition. Starting with the column on the left, you can edit recruiting start date, target hire date, target end date, job posting title, additional job description, time type, worker sub-type (that is whether the position is term or ongoing) and primary location on the job requisition at any time and must be done before you start the employment agreement to ensure you don’t run into any errors when submitting the job details.

You cannot edit the Job Profile (whether the position is paid hourly or salary) or the job description within the job requisition itself. You also cannot Edit Position Restrictions while a job requisition is open. To change these details, you would need to close your job requisition, use the Edit Position Restrictions task to update the details on the position, and then process a direct hire/add job/or change job into the position making sure you put comments explaining what happened.

If you have any questions about these details, what they should be, or if you are changing these details after you have already posted, we also recommend that you work with your departmental HR or advisory representative to ensure you have met the minimum posting requirements for your position. So again, you can edit these details in Workday, but whether you should be editing them is a question for HR.

Also note that if you have a restriction directly on the position, you will not be able to edit it through the job question either. We do recommend leaving the position as open as possible so that it is flexible for you to hire into and you’re not locked in to part-time or full-time, or term or ongoing.

When Should You Edit the Job Requisition?

These are just some examples of when you might need to use the Edit Job Requisition task and this is just to give you an idea of when it might come in to play.

You won't run into any hard errors in the recruitment process if you don't edit the job req, until you reach the employment agreement stage for your successful candidate and you find out that you can't change some detail on the employment agreement because it doesn't match what you're trying to enter.

You forgot to add language for the internal rider on your non-union posting

(*Add Text to Additional Job Description Box*)

You posted the position **recently**, but need to hire the successful candidate **retroactively**

(*Edit Recruiting Start Date*)

You posted your position, but need to change it from full time to part time

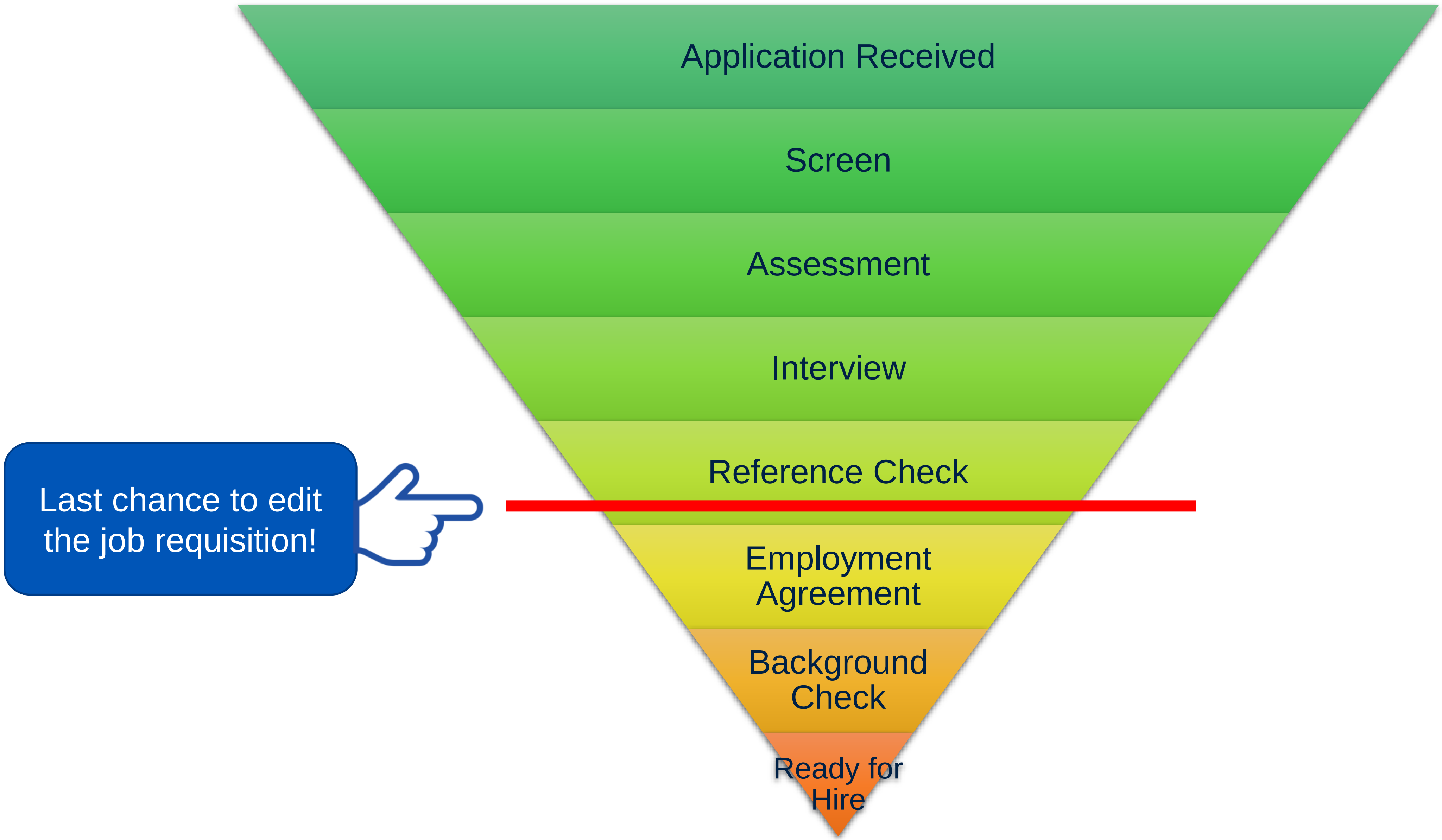
(*Edit Time Type*)

You posted the position as **ongoing** but the successful candidate has a **work permit**

(*Edit Worker Sub-Type*)

Changing from Ongoing to Term

Recruitment Stages



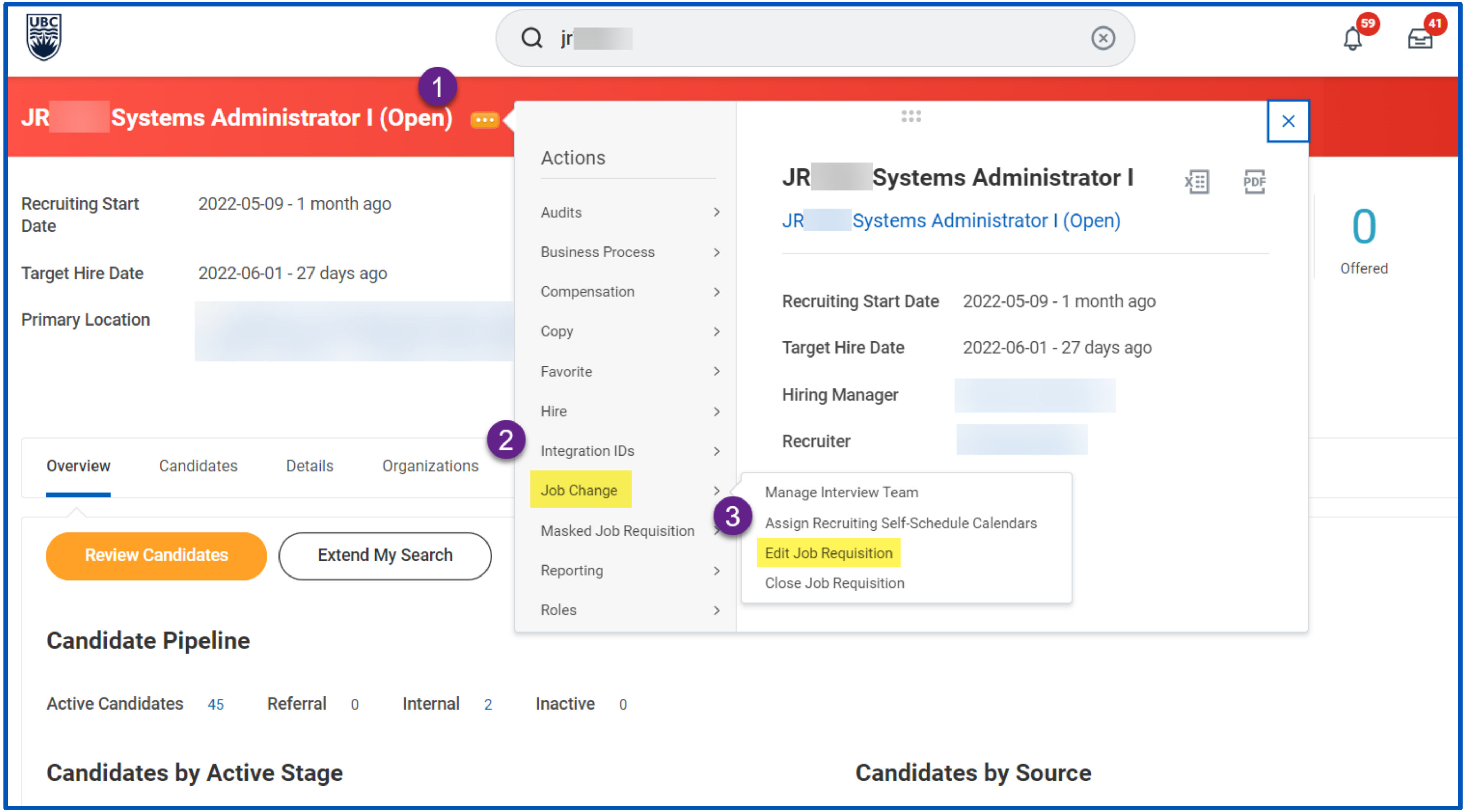
Changing from Ongoing to Term

Our first example of editing a job requisition is when we've posted our job as ongoing, we've completed the recruiting process, but we now know the successful candidate has a work permit and therefore cannot be hired into an ongoing position (if you need any advice on these scenarios be sure to talk with your department HR or advisory rep).

If you didn't edit the job requisition and started the employment agreement for the successful candidate for this scenario, you would see that there is no where to enter the end date of their work permit. If you continued further down the hire process without entering the end date, you would eventually reach a hard error that wouldn't let you complete the hire task. And that's because there is a validation in Workday that says someone with a SIN that starts with 9 cannot be hired in an ongoing position. This error pops up because Workday still thinks the position is ongoing. Instead, before moving the candidate to the employment agreement stage, we have to tell Workday that this is now a term position in order to make that field available in the employment agreement stage.

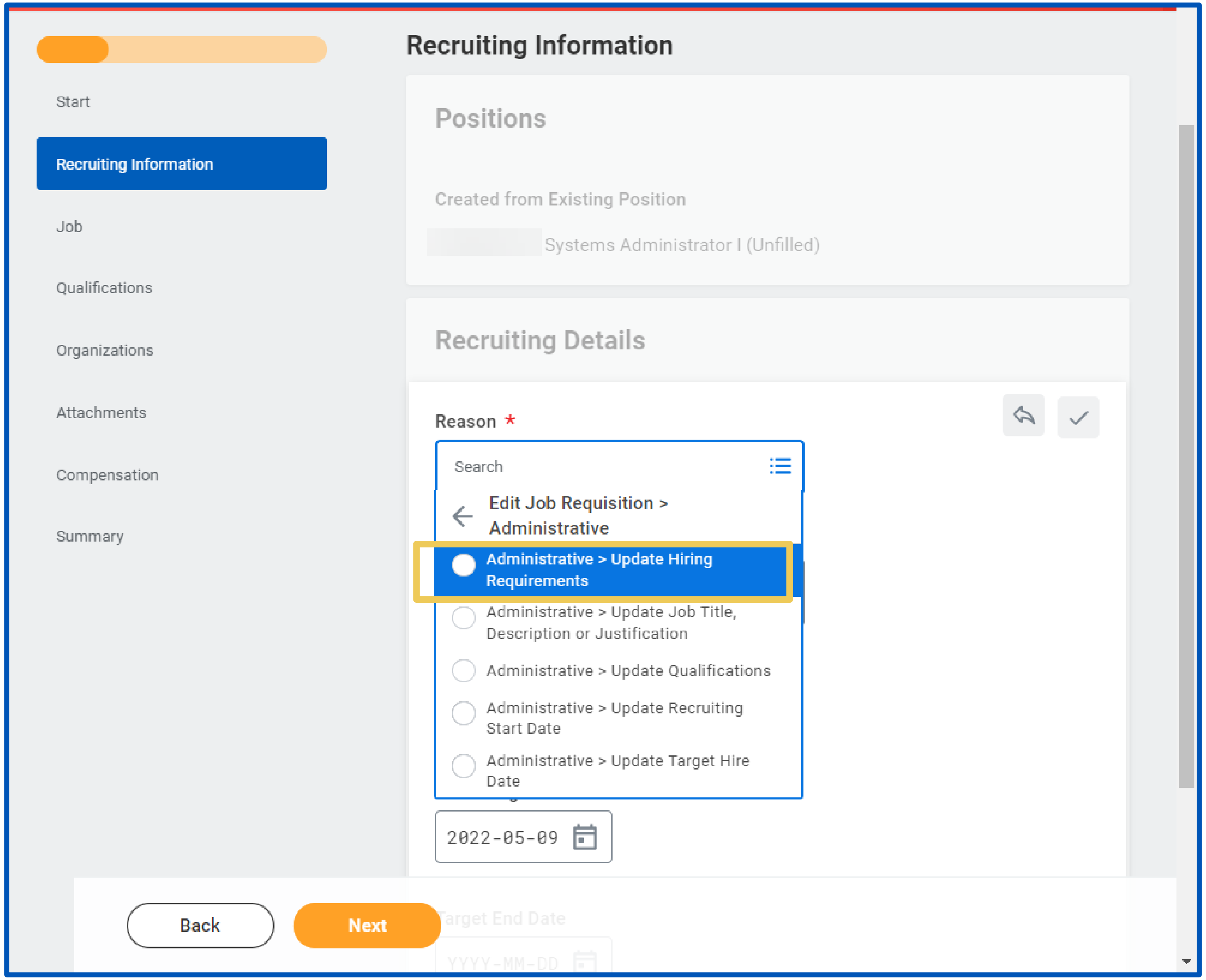
Changing from Ongoing to Term

Start from the job req, related actions > Job Change > Edit Job Requisition



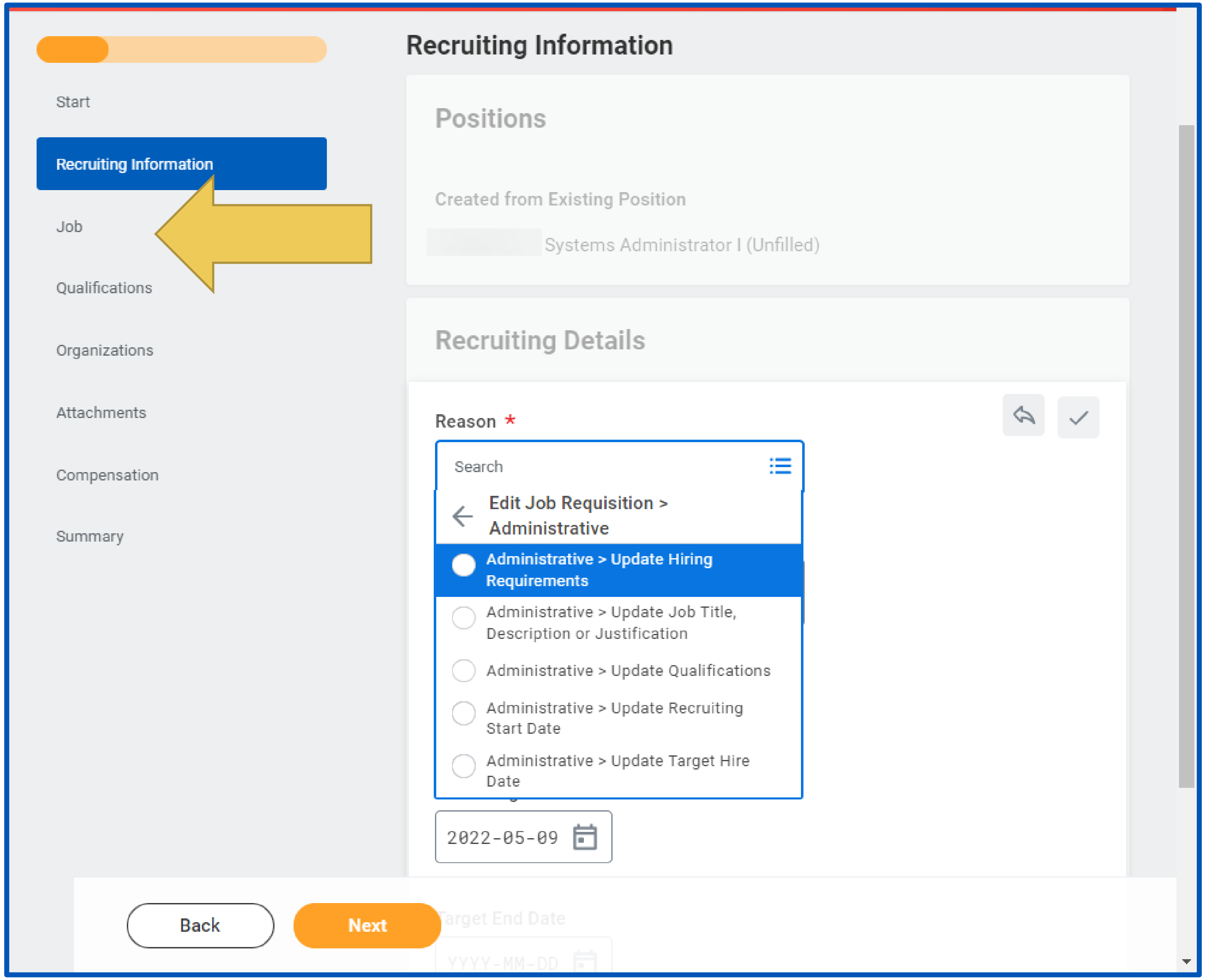
Changing from Ongoing to Term

Under Reason, select the action reason for why you are making an edit. Choose Update Hiring Requirements, since that matches the closest to the scenario.



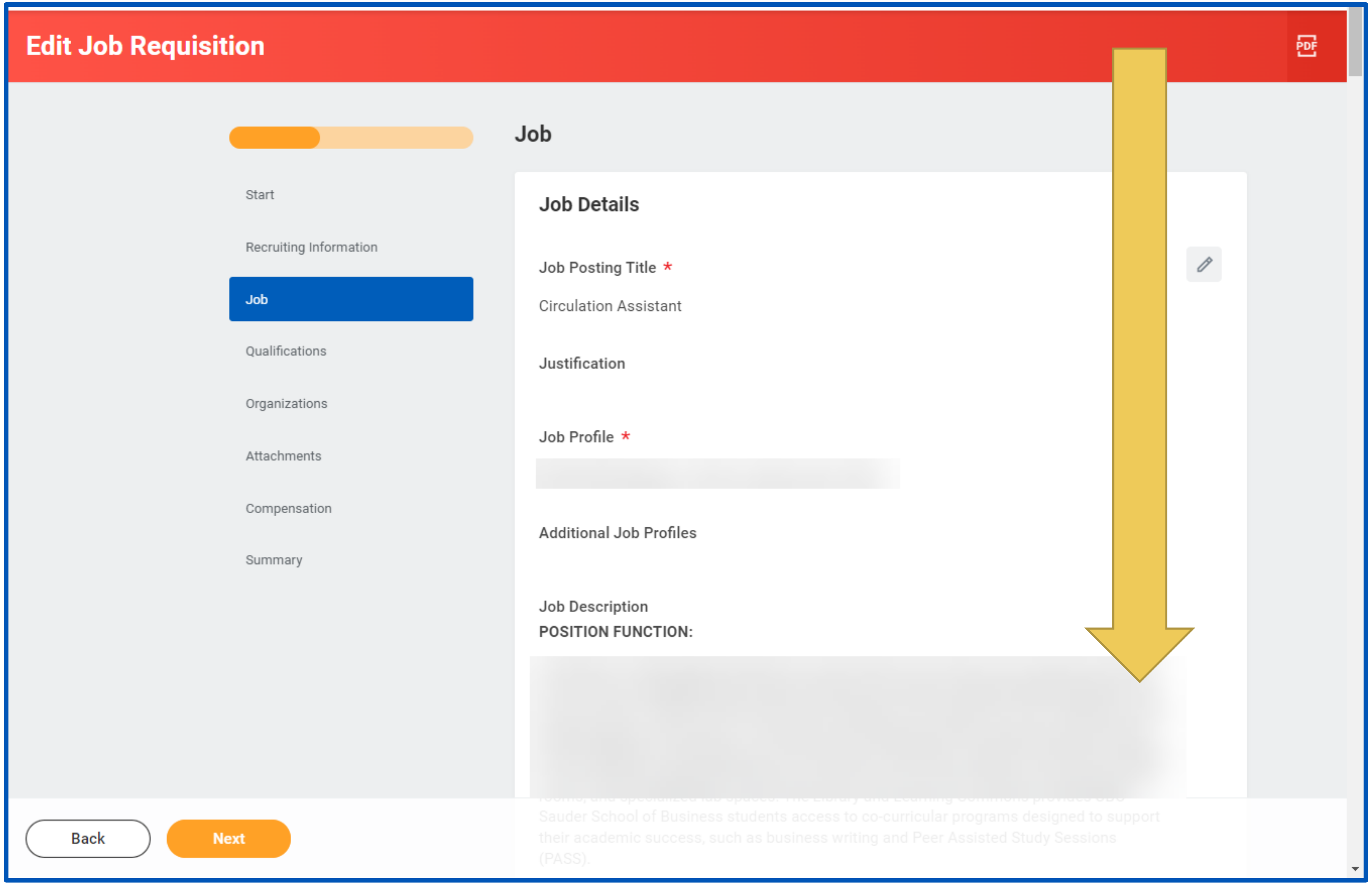
Changing from Ongoing to Term

Next we'll click on the Job tab to find the field called Worker Sub-Type.



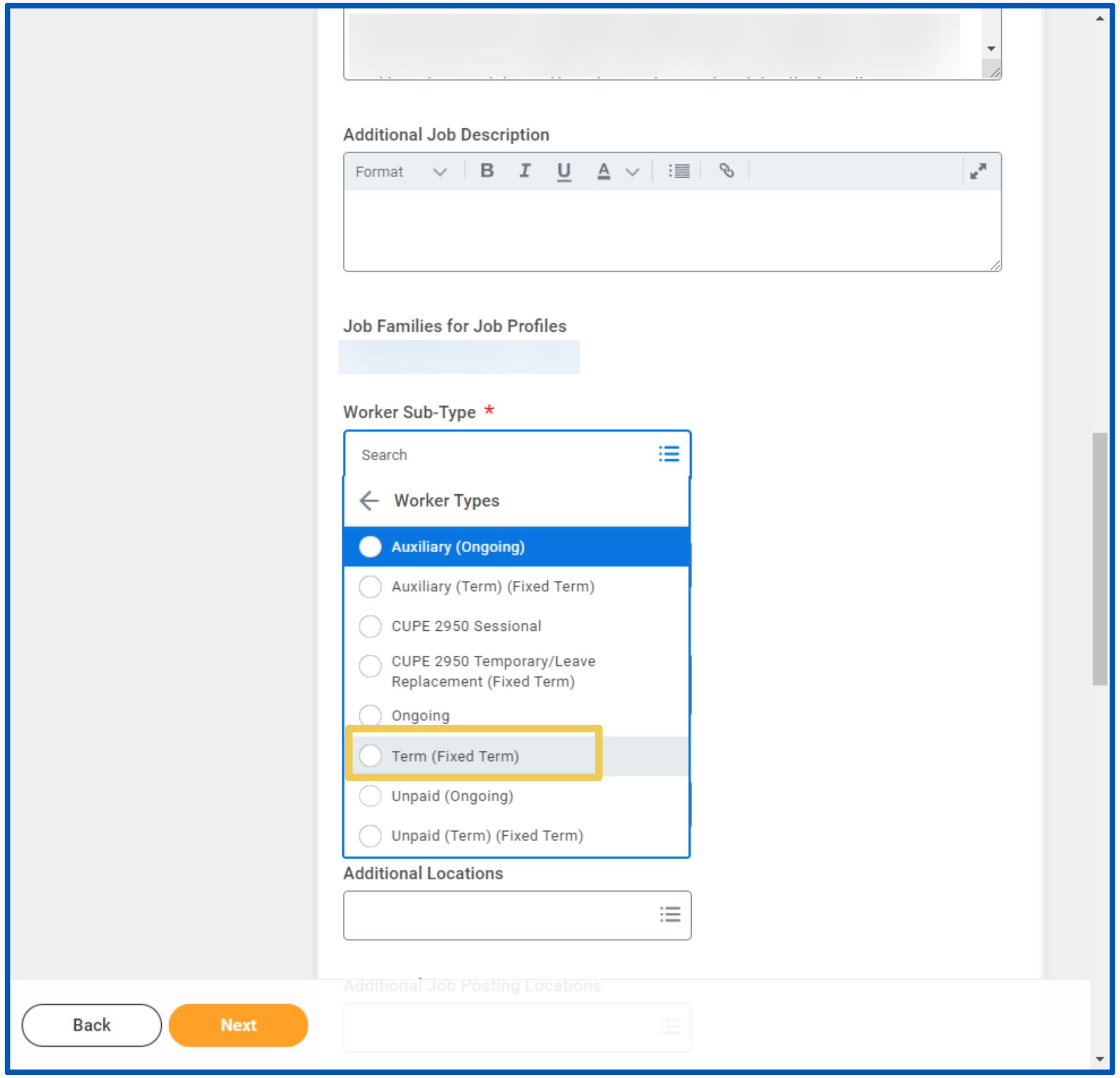
Changing from Ongoing to Term

Click into the page, or on the Pencil icon to open the fields for editing. Scroll down on this page past the job profile and job description to get to more fields.



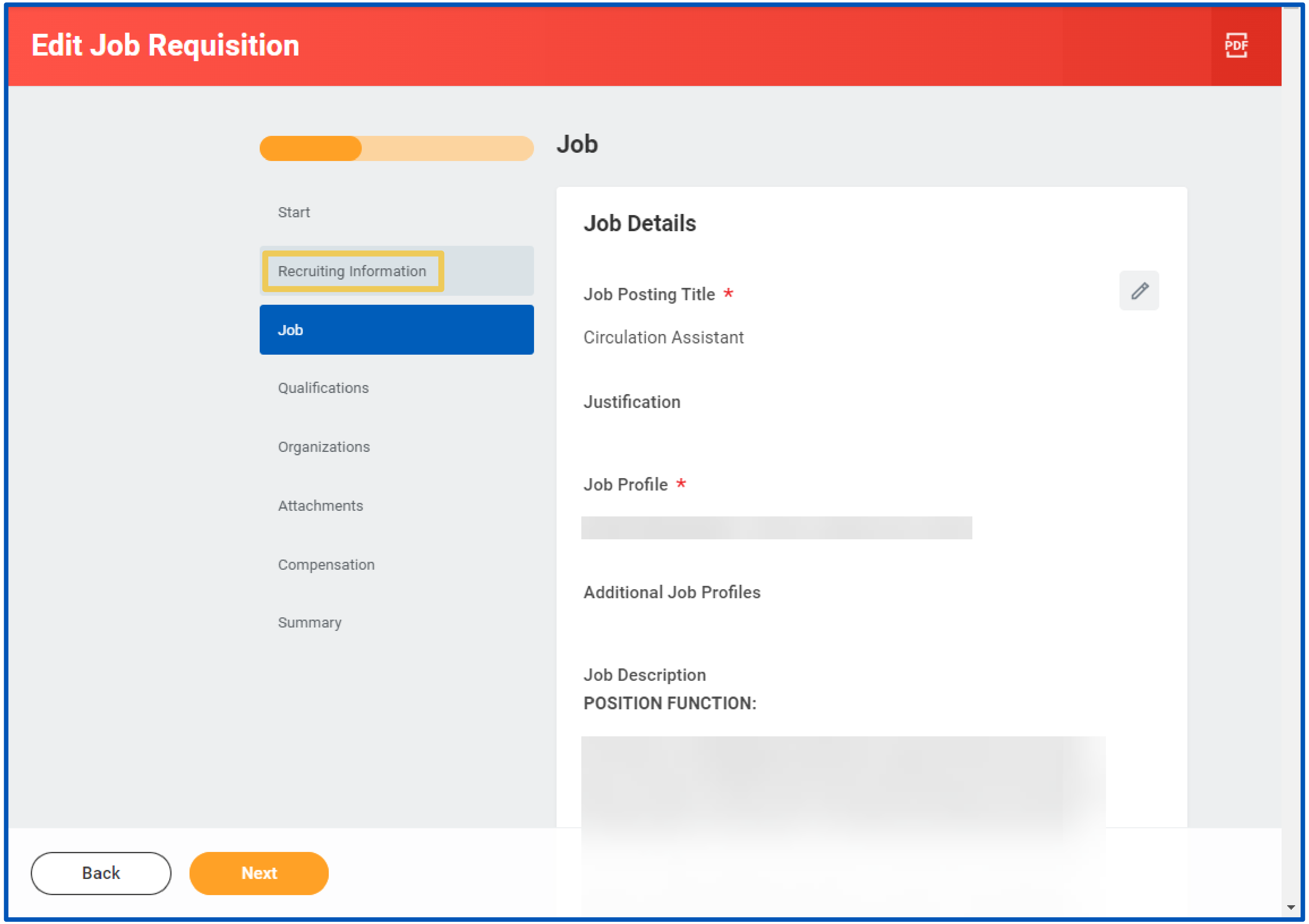
Changing from Ongoing to Term

In the Worker Sub-Type box, delete the Ongoing field, click into the box to open the search and click on Worker Types > Term (Fixed Term). Once the worker subtype is added, put an end date on the job requisition. If you forget, don't worry, Workday won't let you submit without adding one.



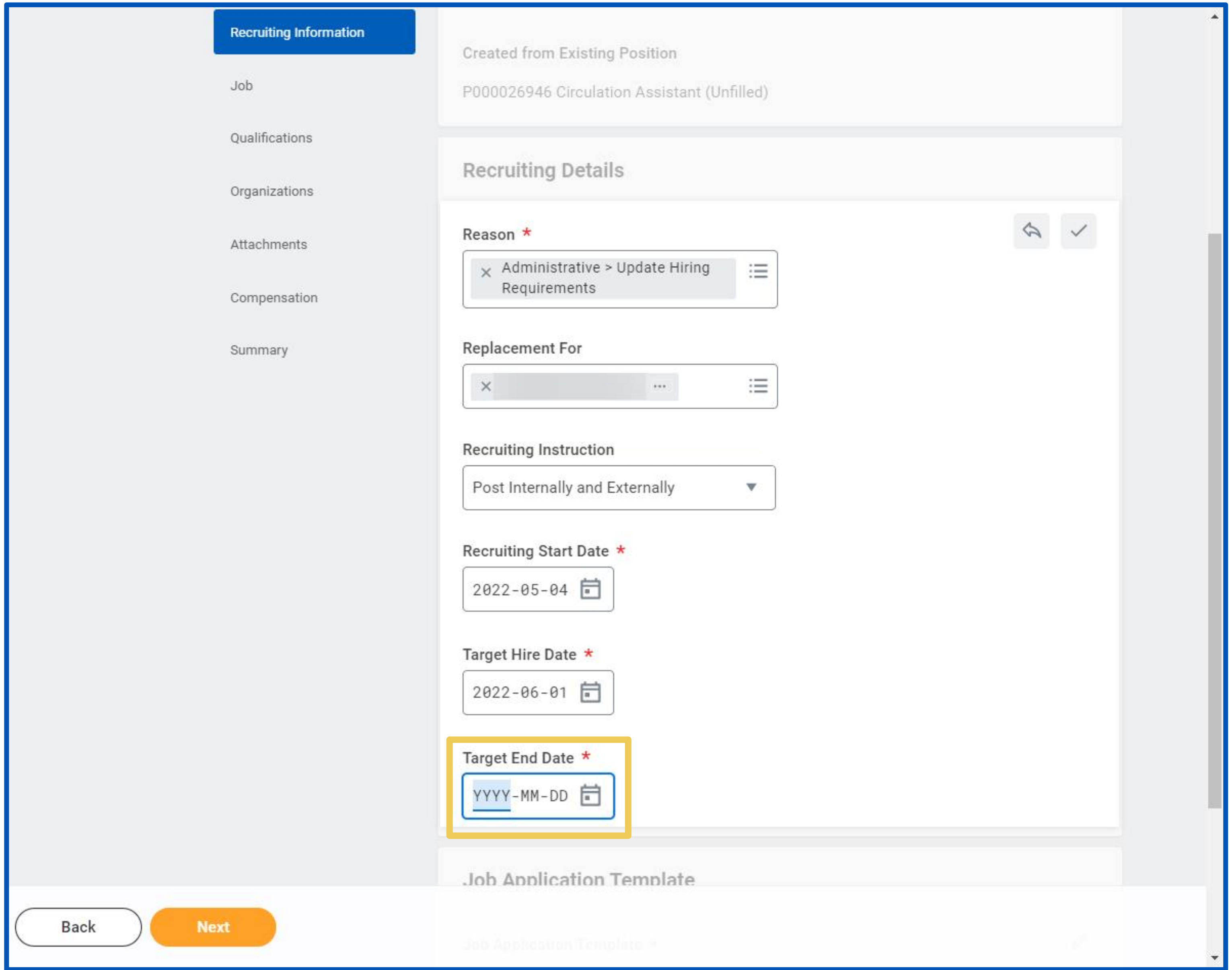
Changing from Ongoing to Term

To add the end date, scroll back up, and click on the Recruiting Information tab.



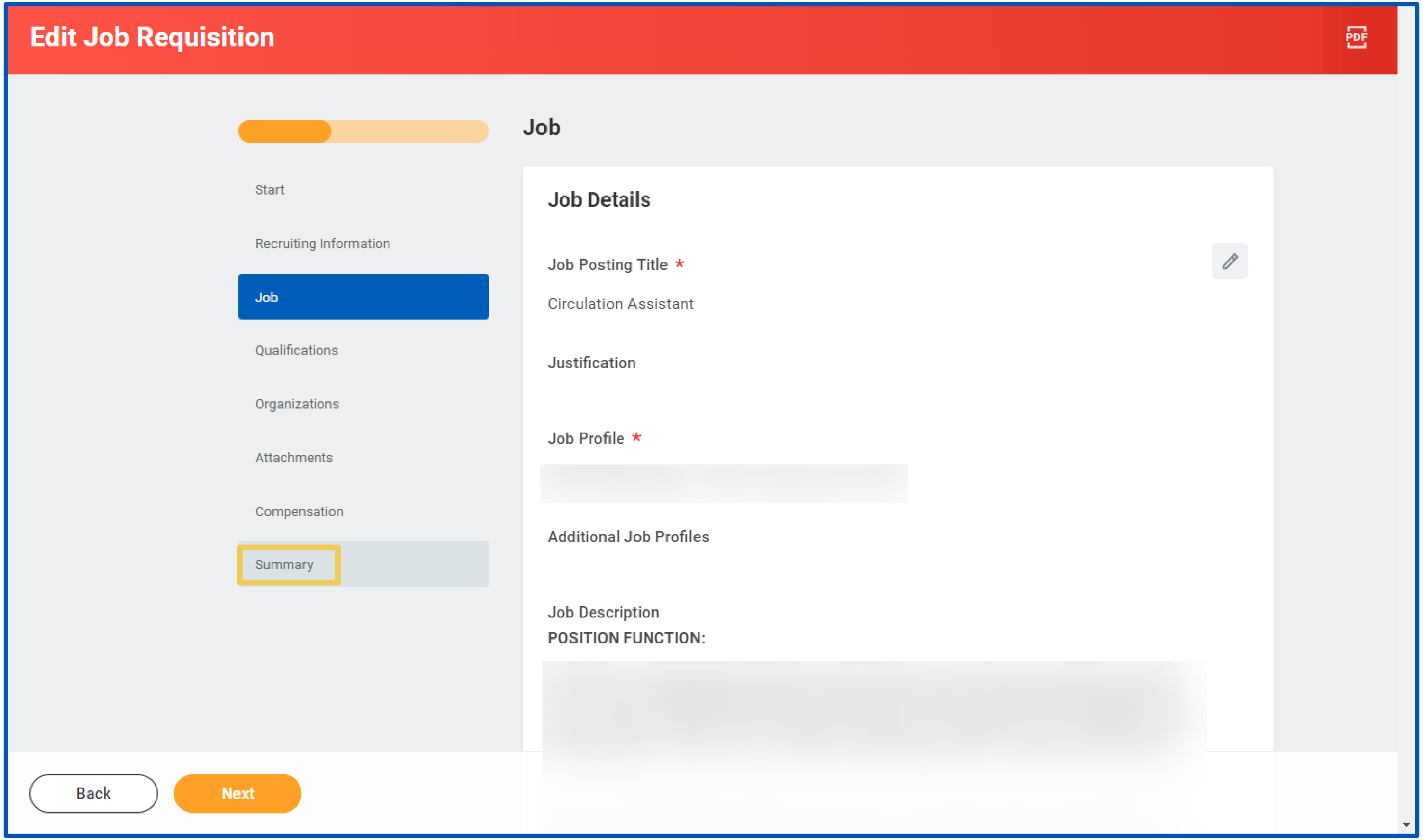
Changing from Ongoing to Term

Click into the page or click on the Pencil icon to edit, scroll to the Target End Date field, and if you were hiring an employee with a work permit, you would enter the end date of their work permit here.



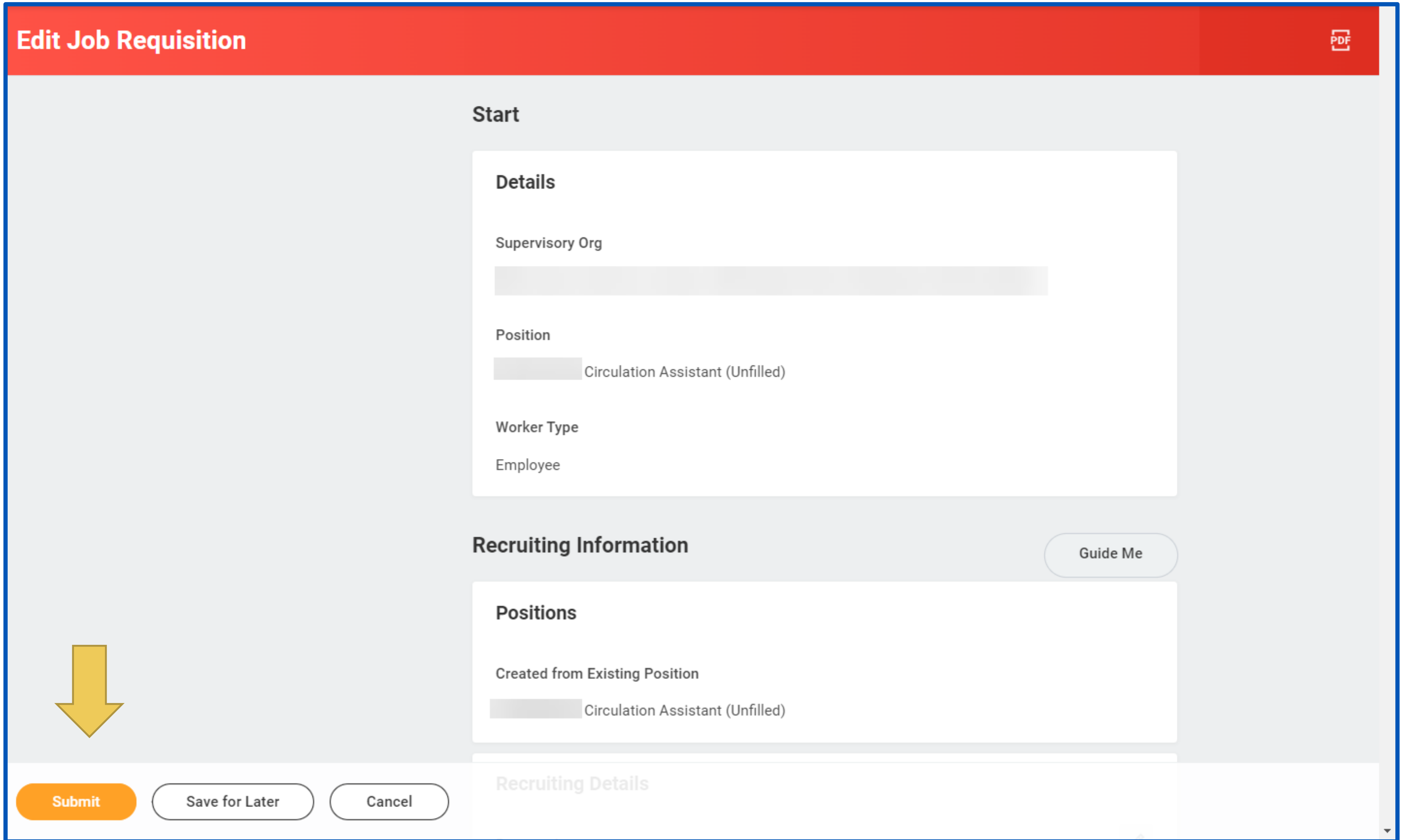
Changing from Ongoing to Term

Scroll back up to the top and click on summary from the menu on the left.



Changing from Ongoing to Term

This brings you to a page with all of the job req information in one spot for you to review before submitting. Once everything is confirmed, click the submit button.



Changing from Ongoing to Term

In summary, editing a job requisition is really a basic process to let you go back to your details and change them to meet your needs for either the job posting or the employment agreement.

Questions about when you should post or what you can change on a posting/employment agreement should be directed to your department HR or advisory representative.

Hiring Retroactively

Troubleshooting Errors

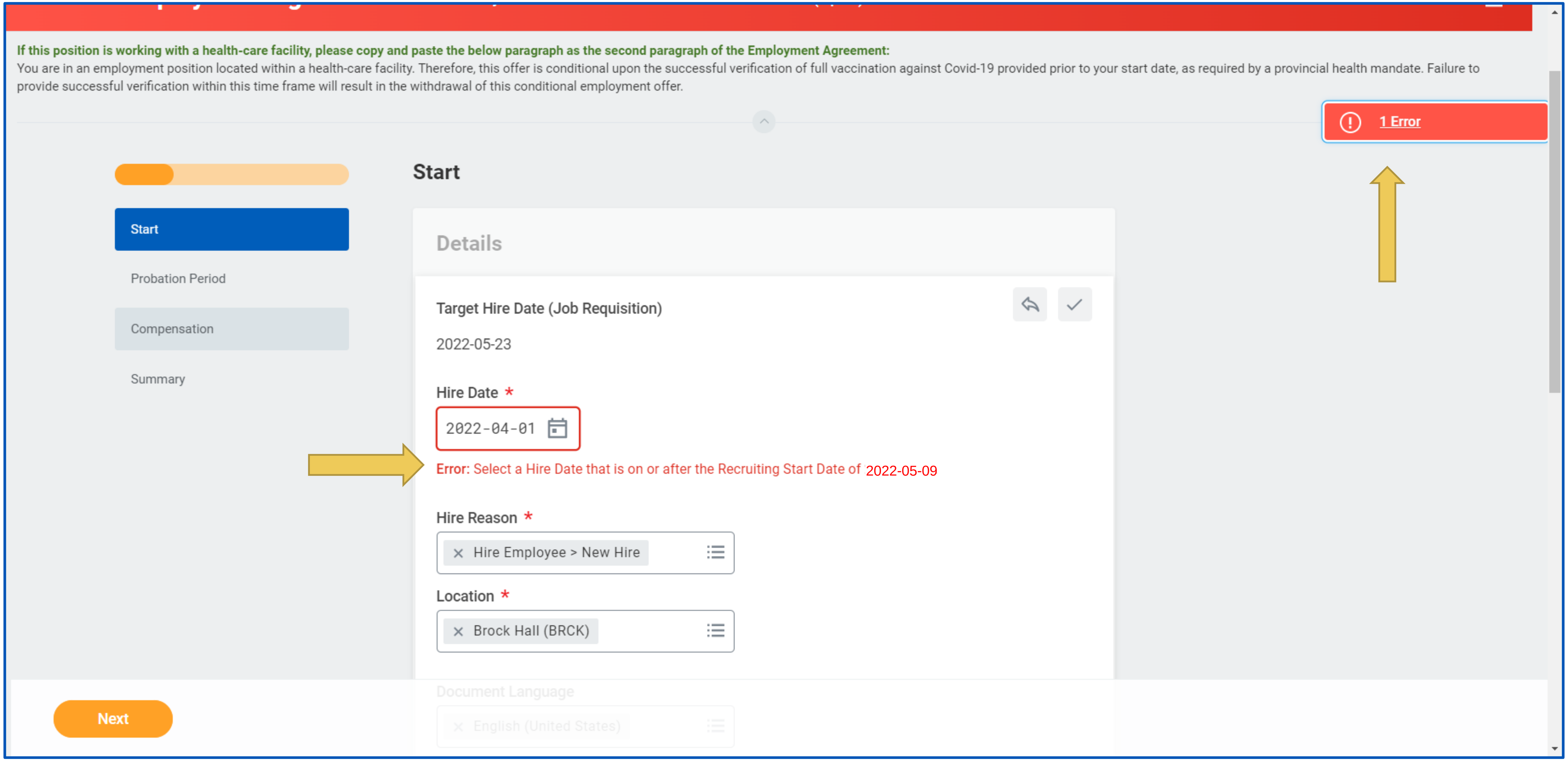
The second example of editing a job req that we wanted to touch on is hiring retroactively:

If you move your candidate to the employment agreement stage without editing, you'll likely run into this error when you're trying to enter a date in the past. It says: Select a Hire Date that is on or after the Recruiting Start Date of May 9, 2022. You'll notice the hire date we tried to put in was April 1st.

This can be corrected, but as the error mentions, we first have to edit the Recruiting Start Date field. You won't be able to submit the page at this point, due to the error, so you can cancel out of it.

Hiring Retroactively

Troubleshooting Errors



Hiring Retroactively

Troubleshooting Errors

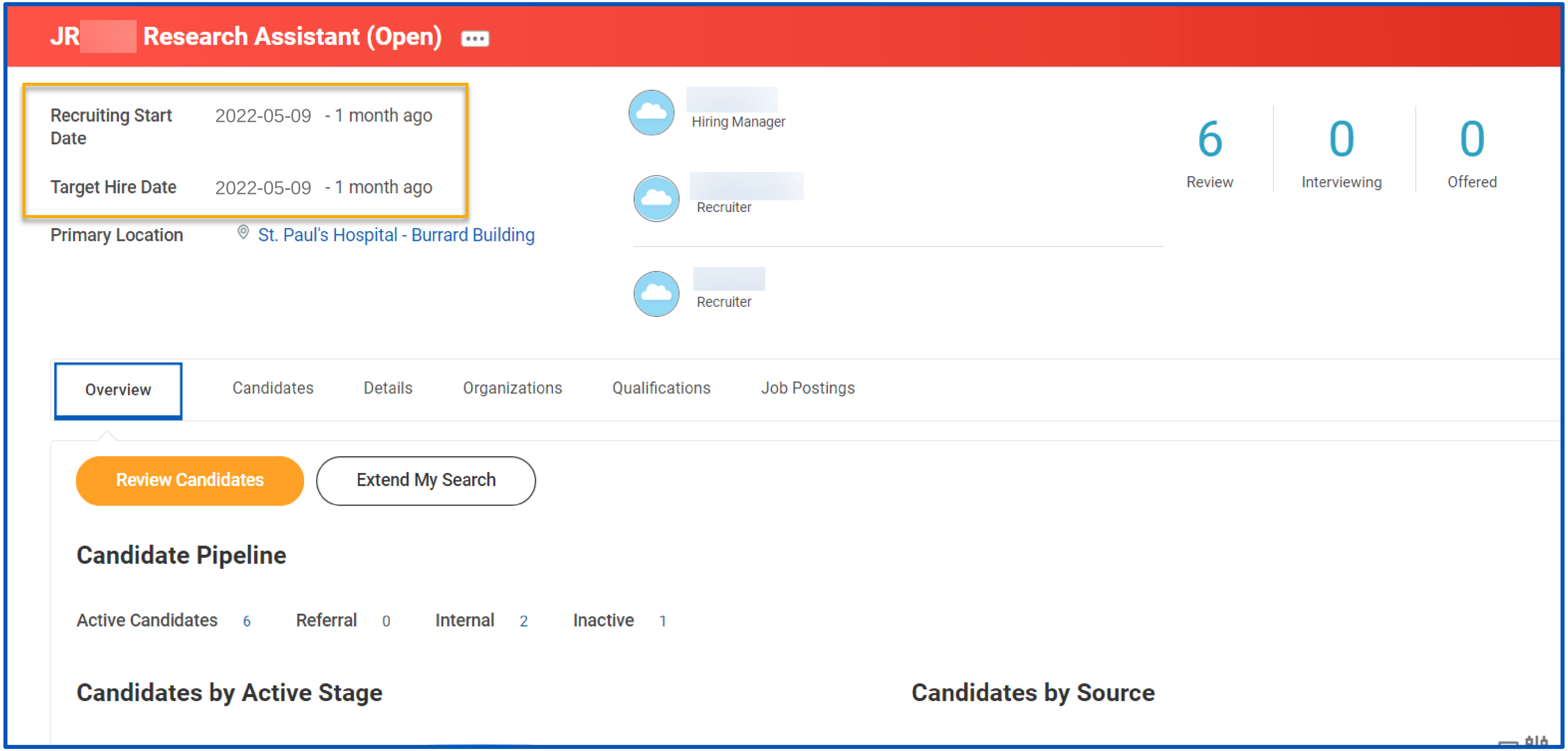
You can see the Recruiting Start Date and the Target Hire Date on the main page.

The Recruiting Start Date is the important date here. We cannot put a hire date on the employment agreement that is before this date, or else you'll get the error we just saw. This is where that May 9th date is coming from.

The Target Hire Date is less critical, as it doesn't control any validations, it would mostly be used for reporting purposes.

Hiring Retroactively

Troubleshooting Errors



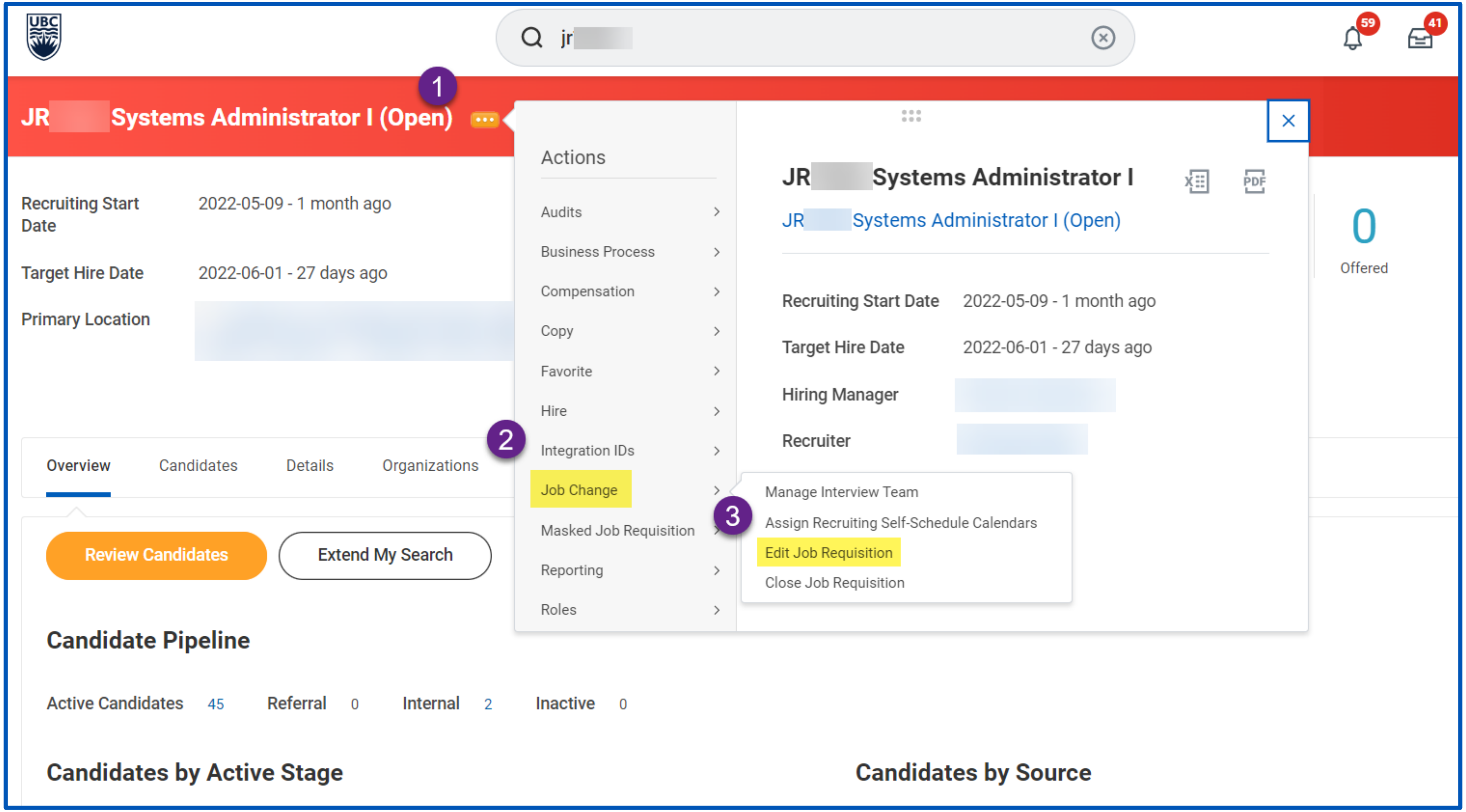
Hiring Retroactively

Again, we'll start from our job requisition, related actions > Job Change > Edit Job Requisition and follow the same steps as before.

The only time you might run into an extra issue here, is if you are trying to change the Earliest Hire Date to something before the position itself was effective.

Hiring Retroactively

Troubleshooting Errors



Re-Posting After Editing a Job Requisition

Re-posting After Editing a Job Requisition

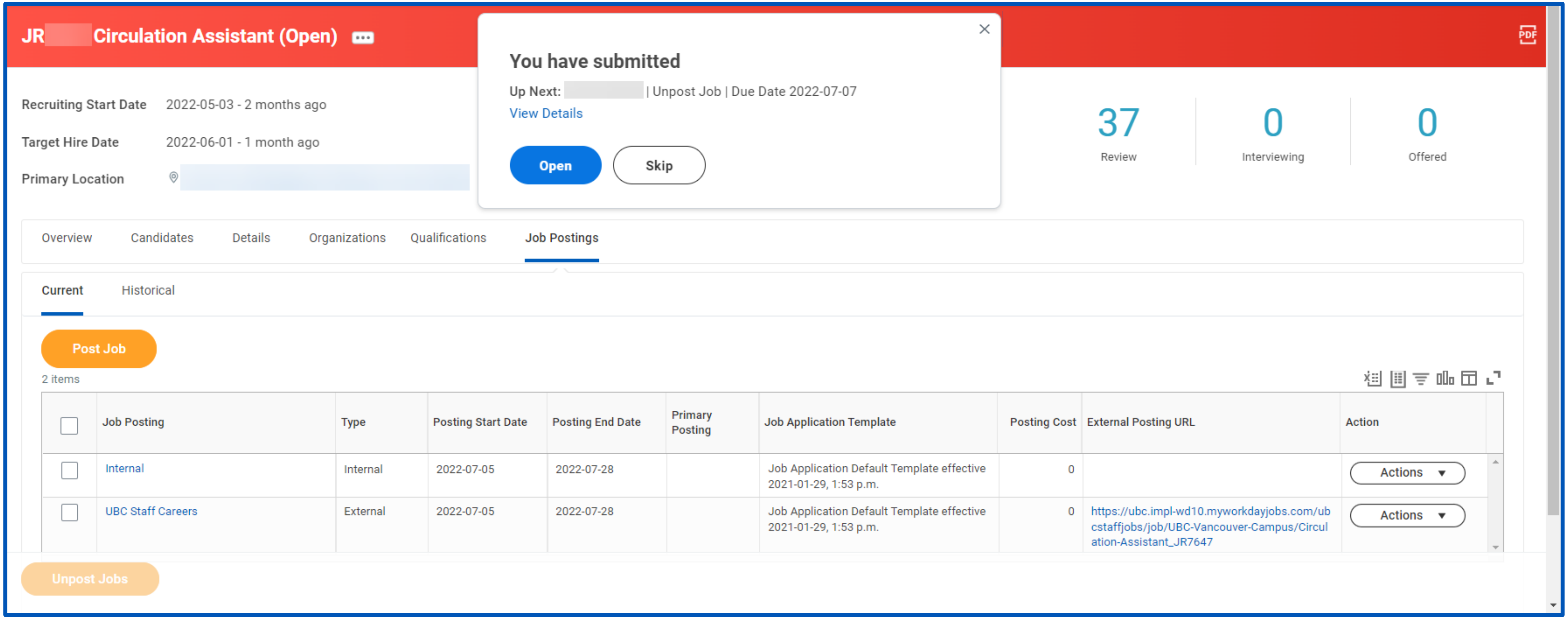
As soon as you hit submit after editing the job requisition, you will get a task in your inbox in regards to posting the position.

If you’re editing the job req while you have an active posting, the task will ask you to un-post the job and re-post it. Re-posting is absolutely **a required step** as the only way to update the posting on the career site is to un-post and re-post after you’ve made the change to the job req.

If the job posting is NOT active, you will get a task asking you to post the job. Depending on the change you’ve made, you may or may not be required to post again. For example, in the case of hiring the person with the work permit, we were just editing the job requisition from ongoing to term to process the hire so you may not need to repost in that case. Check with your department HR or advisory rep if you have any questions. If you don’t have to re-post then you can use the skip button to move past the task.

Re-Posting After Editing

Unpost Job

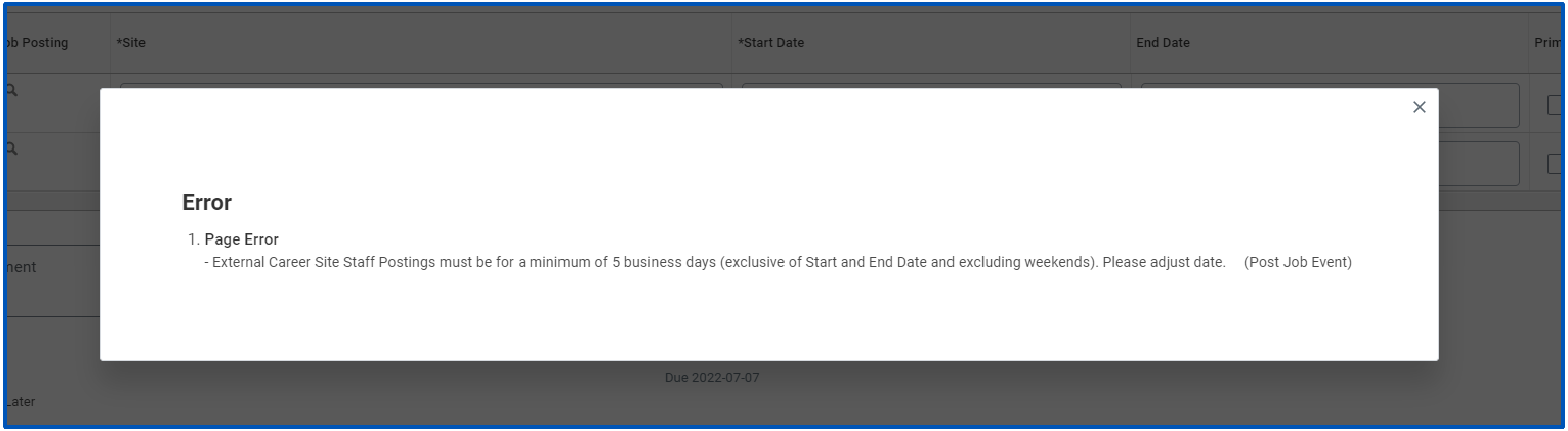


Re-posting After Editing

Troubleshooting Errors

It’s important to be aware that even if you met the minimum posting requirements the first time you posted the position, if you’re re-posting, you must post for the full minimum duration again. If you try to post for less than the minimum, you’ll get this error.

To get rid of this error, go back to your End Dates and adjust them accordingly. Click submit on the task and you’ve successfully edited your job requisition and re-posted it so that the changes are visible on the career sites.



Avoiding Duplicate Records

Avoiding Duplicate Records

The next topic to cover is how to avoid creating duplicate employee records when hiring through recruitment.

We can't allow duplicate records in Workday as there are many negative downstream impacts starting with the employee not being able to log in to Workday, the duplicate record would be assigned an incorrect employee ID and obviously pay, benefits, and T4s would all be incorrect.

To unravel a duplicate record once it's created takes time and involves many teams to correct all the different areas impacted. The best thing to do it avoid creating a duplicate record in the first place and there is a simple process to do that.

Avoiding Duplicate Records

Reasons for Duplicate Records

A duplicate record can be created in two scenarios:

1. An internal candidate applies to a job requisition externally (this is incorrect as they should have logged in to Workday and applied via the Careers application) and the primary recruiter does not check to see if they have a duplicate record, before moving them to the employment agreement stage.

2. The second scenario is when a former worker applies to a job requisition and the primary recruiter does not check to see if they have a duplicate record, before moving them to the employment agreement stage.

If you are the Primary Recruiter you have the power to avoid both of these situations and save yourself a lot of time with trying to unravel the process after the fact.

1

Internal Candidate Applies Externally

2

External Candidate Not Merged With Former Worker Record

Avoiding Duplicate Records

Viewing the Candidate Grid

The first tip to avoid a duplicate hire as a Primary Recruiter is to know that if the candidate’s name has nothing in brackets behind it, it means the candidate applied externally.

When an internal candidate applies correctly through the Career app in Workday, it will say internal in brackets behind their name. Similarly, once you merge an external candidate’s record with their former Workday employee record, it will say Prior Worker behind their name.

If you know your successful candidate is an internal employee or was a prior worker, you should never be moving the candidate record to employment agreement stage if their status isn’t identified behind their name. Generally, only external candidates that have never worked at UBC before should be moved to the employment agreement stage with nothing behind there name.

The second tip to know is to always check the Previous Worker column on the candidate grid. On the job application, we ask candidates if they have ever worked or been a student at UBC before. If they answer yes, it will show here. If someone answers ‘yes’ to this question, you should always be checking to see if there is a duplicate record.

	Job Application	Step / Disposition	Awaiting Action	Awaiting Me	Date Applied	Resume	Employment Group (Internal Candidates Only)	Previous Worker	Worker Sub-Type	Applicant Prioritization Notes	FTE for Current Position	Posting End Date	Sou
	Andy Applicant (Prior Worker)	Application Received			2020-11-24	Cover Letter.docx Resume.docx		Yes	Ongoing		0.0%	2020-11-26	So the

Avoiding Duplicate Records

Viewing the Candidate Grid

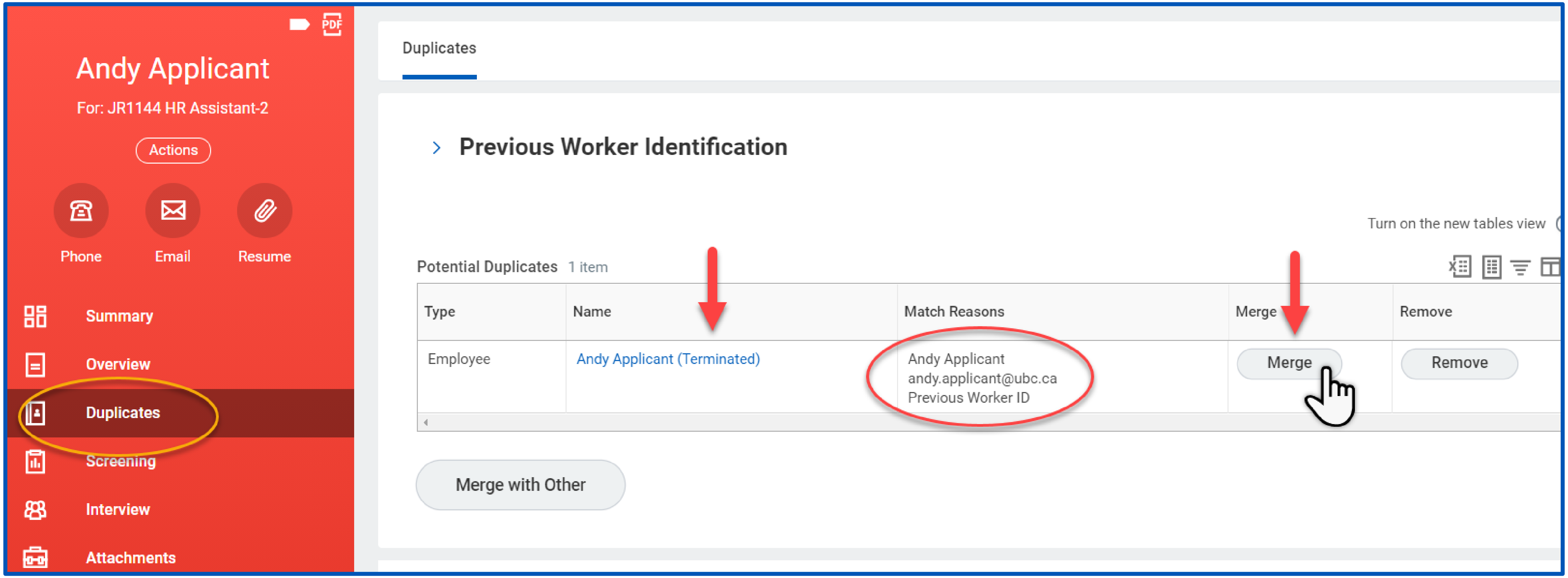
To check for the duplicate record, click on the candidate’s name to go to their candidate profile.

	Job Application	Step / Disposition	Awaiting Action	Awaiting Me	Date Applied	Resume	Employment Group (Internal Candidates Only)	Previous Worker	Worker Sub-Type	Applicant Prioritization Notes	FTE for Current Position	Posting End Date	Sou
	• Candice Candidate	Application Received			2020-11-24	Cover Letter.docx Resume.docx		Yes	Ongoing		0.0%	2020-11-26	So the

Avoiding Duplicate Records

Former Worker

Click on the Duplicates tab from the menu on the left.* We can see that this candidate matches with a former worker. Take a look at the match reasons column. This will tell you what details are matching between the external candidate and the worker record that exists in Workday. If you're sure that the details are matching accurately and these are indeed the same person, then click on the merge button to merge the external candidate record with the existing workday record.



*Note that this may take some time to show up because Workday is checking through all the employee records to find any matches based on the information entered. You may need to leave it running and come back to the page after a couple of minutes.

Avoiding Duplicate Records

Former Worker

You will be taken to the Merge Candidates page. The table on top shows you the two separate records that currently exist with any applicable information. One is the candidate and one is the employee.

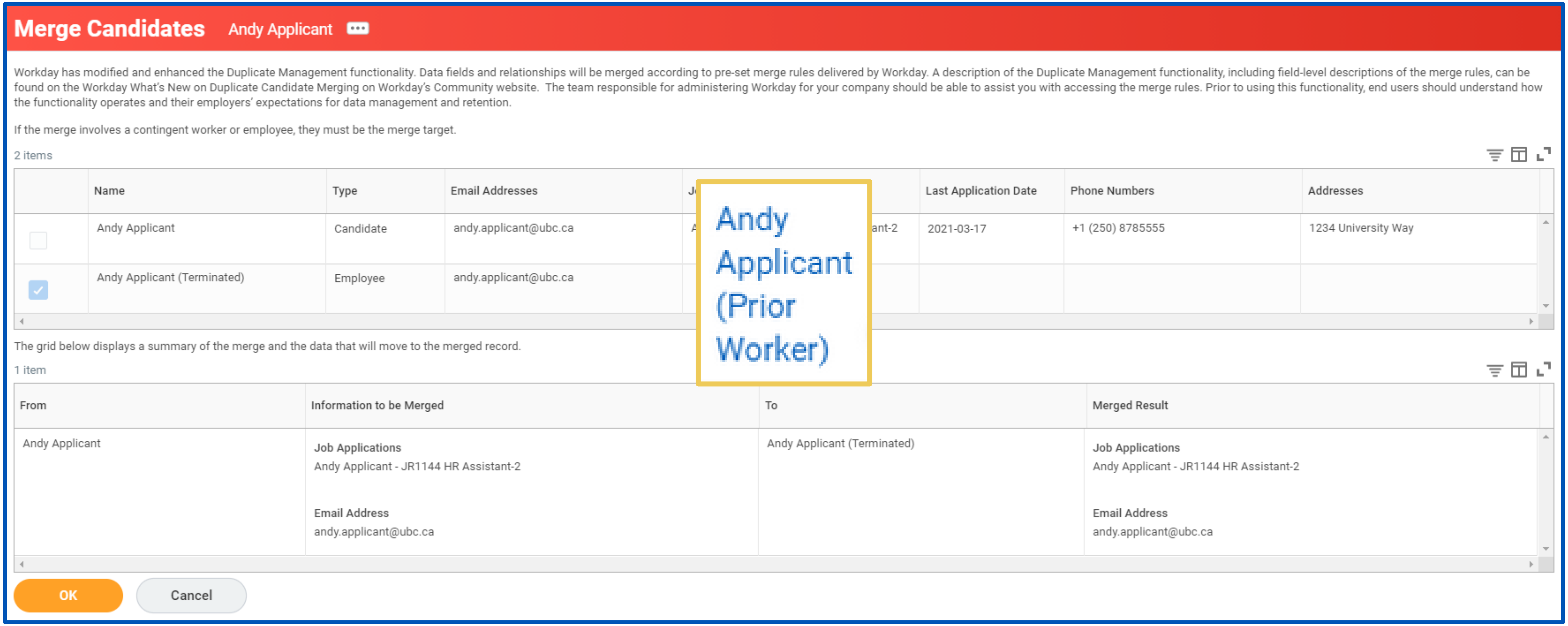
The table below shows you the information that will be merged together between the two records.

Review this page for accuracy and click OK.

When you return to the candidate grid, the employee's name will now say Prior Worker behind it. You can now safely move the candidate to the employment agreement stage to finish the hire.

Avoiding Duplicate Records

Former Worker



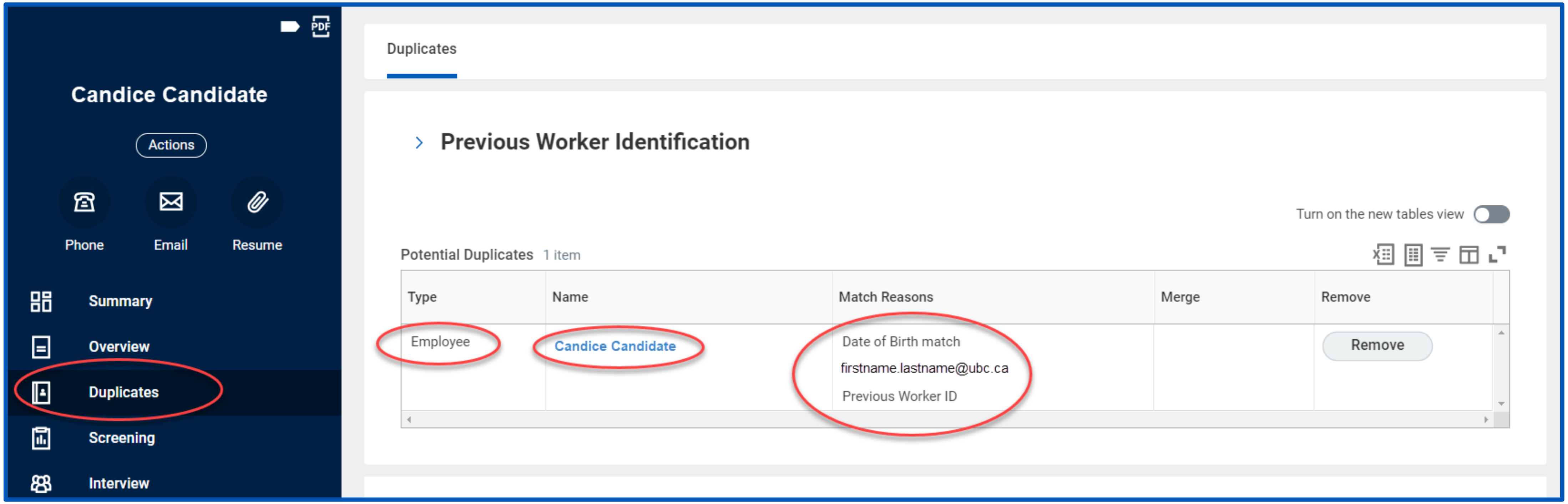
Avoiding Duplicate Records

Internal Candidate

In cases where the external candidate matches with an Active employee record (an internal employee), you cannot merge the records together.

You will either need to ask the internal employee to apply to the job requisitions through the Career app in Workday (if the posting it still active), or you can link the employee's internal record to the job requisition on their behalf.

Once the employee's internal record is applied on the job requisition, you can move that record to the employment agreement stage and continue on with the hire.



Recruitment Candidate Guide

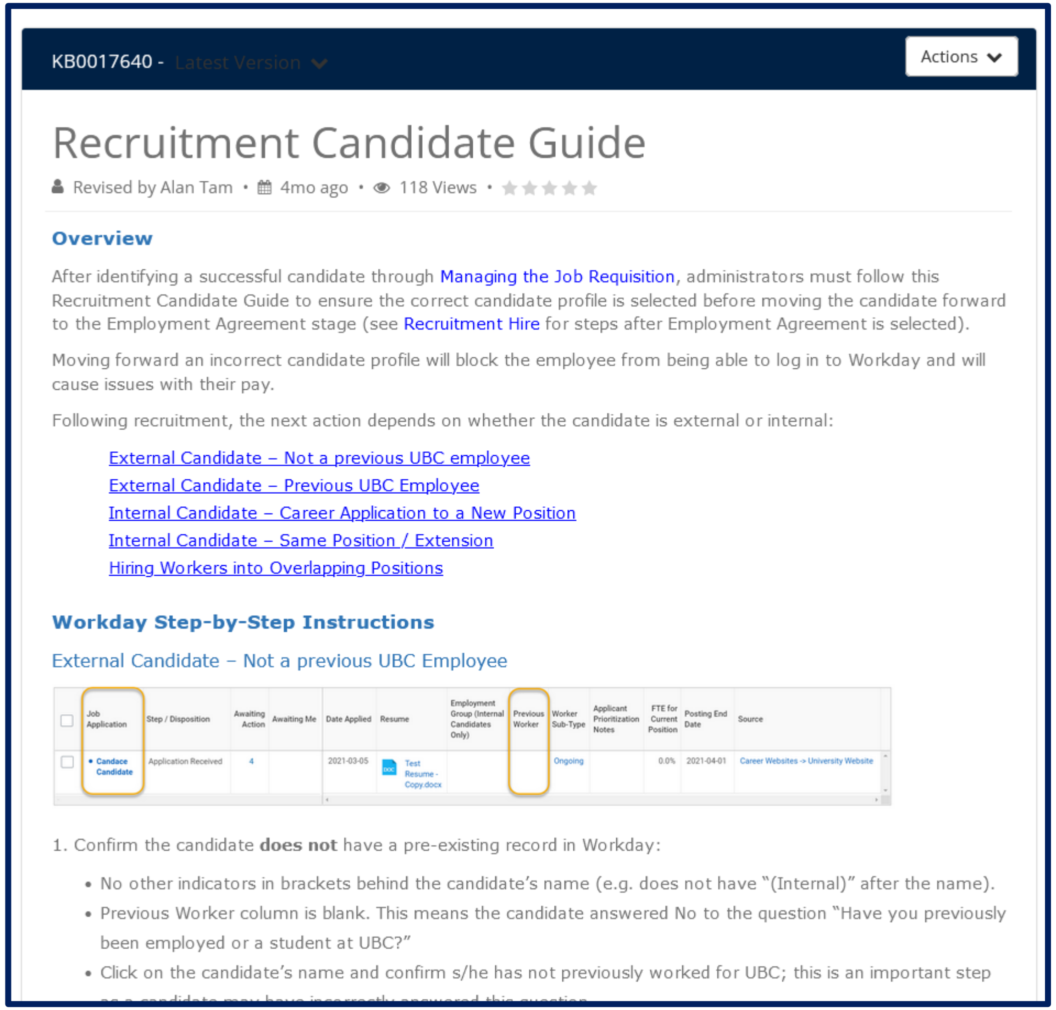
Recruitment Candidate Guide

Recruiting Resource

The Recruitment Candidate Guide will walk you through the steps of hiring candidates with screenshots. It covers each type of candidate scenario that you might run into, so before you move your candidate to the employment agreement stage, double check with this guide that you've completed any necessary steps. This will ensure the hire is processed correctly from the beginning so the process can run smoothly.

Remember, if an employee has an Employee ID that starts with "E" that means it is a duplicate record and a Workday support request will need to be submitted to the ISC to resolve the issue.

[Recruitment Candidate Guide](#)



KB0017640 - Latest Version

Actions

Recruitment Candidate Guide

Revised by Alan Tam • 4mo ago • 118 Views •

Overview

After identifying a successful candidate through Managing the Job Requisition, administrators must follow this Recruitment Candidate Guide to ensure the correct candidate profile is selected before moving the candidate forward to the Employment Agreement stage (see Recruitment Hire for steps after Employment Agreement is selected).

Moving forward an incorrect candidate profile will block the employee from being able to log in to Workday and will cause issues with their pay.

Following recruitment, the next action depends on whether the candidate is external or internal:

- External Candidate – Not a previous UBC employee
- External Candidate – Previous UBC Employee
- Internal Candidate – Career Application to a New Position
- Internal Candidate – Same Position / Extension
- Hiring Workers into Overlapping Positions

Workday Step-by-Step Instructions

External Candidate – Not a previous UBC Employee

	Job Application	Step / Disposition	Awaiting Action	Awaiting Me	Date Applied	Resume	Employment Group (Internal Candidates Only)	Previous Worker	Worker Sub-Type	Applicant Prioritization Notes	FTE for Current Position	Posting End Date	Source
	• Candace Candidate	Application Received	4		2021-03-05	Test Resume - Copy.docx			Ongoing		0.0%	2021-04-01	Career Websites -> University Website

1. Confirm the candidate **does not** have a pre-existing record in Workday:
   - No other indicators in brackets behind the candidate's name (e.g. does not have "(Internal)" after the name).
   - Previous Worker column is blank. This means the candidate answered No to the question "Have you previously been employed or a student at UBC?"
   - Click on the candidate's name and confirm s/he has not previously worked for UBC; this is an important step

Hiring Former Workers

Hiring Former Workers

Once a former worker is hired through recruitment, they often log in to Workday to accept their employment agreement, update their Government IDs and personal information.

However, they should not be completing it through their Workday account, they need to be logging in to Candidate Home to complete the recruiting steps assigned to them. Candidate Home is the name for the external portal where they applied to the posting.

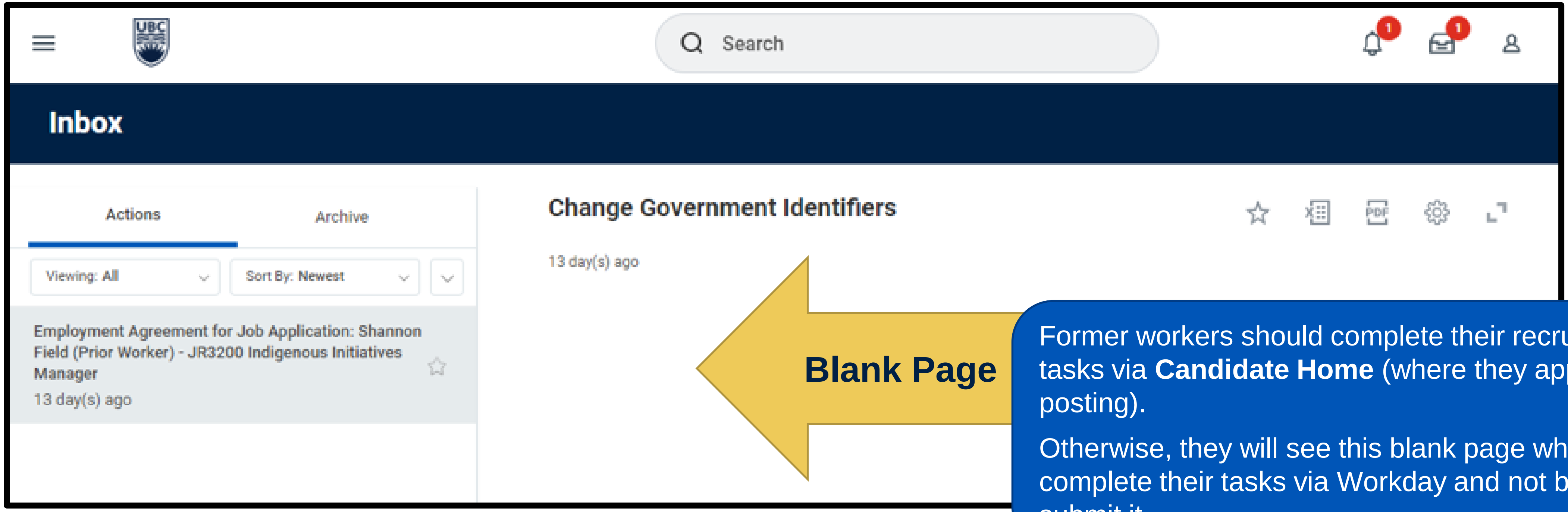
If the employee completes their recruiting steps through Candidate Home, they won’t have any issues completing their tasks. If they complete the steps in Workday, they will get stuck at the point of Change Government Identifiers. This can be resolved without needing to submit a ticket.

Hiring Former Workers

Change Government Identifiers

If a former worker completes their tasks by logging in to Workday instead of Candidate Home, this image shows what it looks like for the employee when they get stuck.

They would have been able to electronically accept their employment agreement, and they would get the task for Change Government Identifiers, but the page would be blank, so they can't actually complete it.



Former workers should complete their recruitment tasks via **Candidate Home** (where they applied to the posting).

Otherwise, they will see this blank page when trying to complete their tasks via Workday and not be able to submit it.

Hiring Former Workers

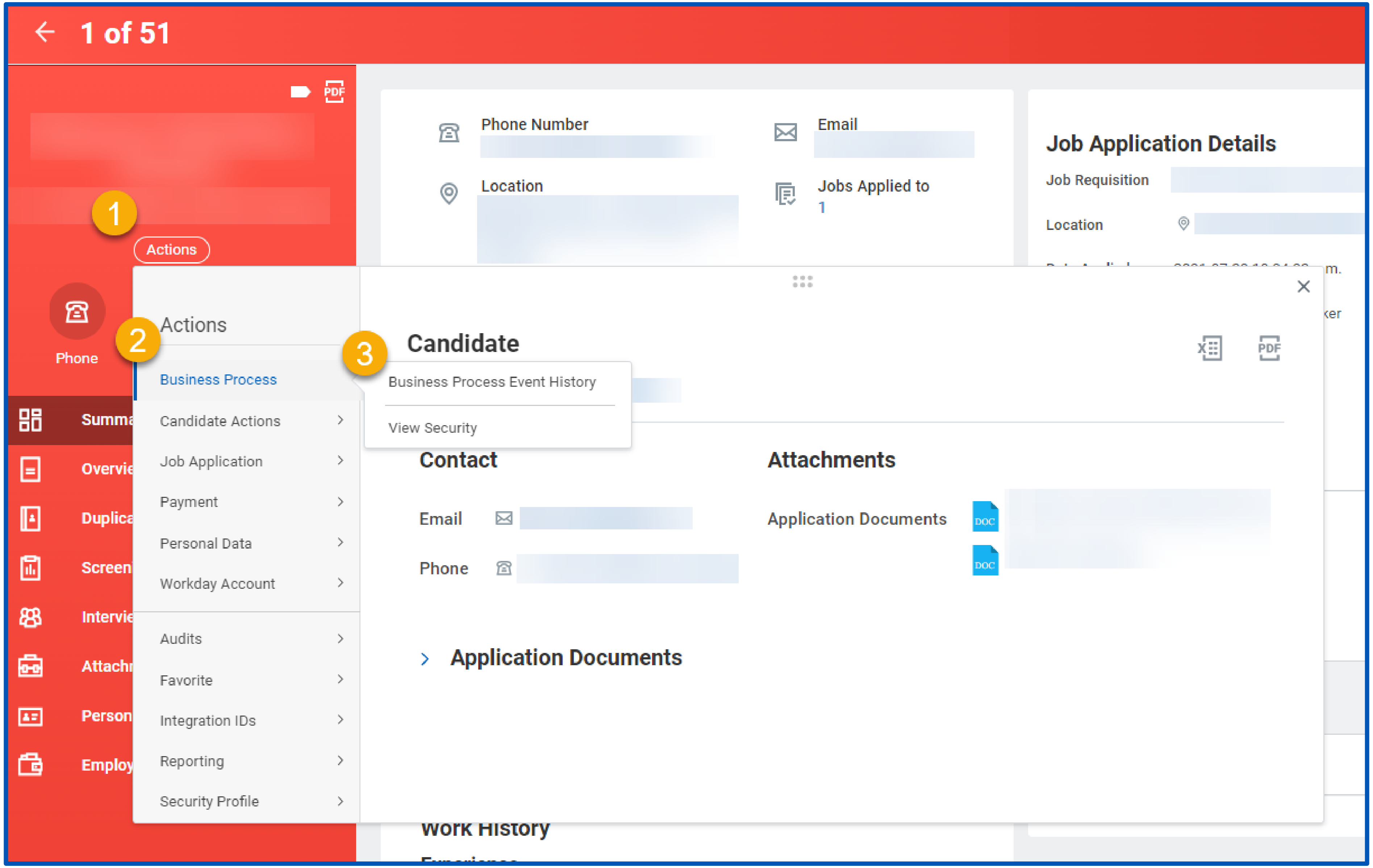
View Business Process Event History

Once you are notified of this issue, you can resolve it by first confirming if the former worker accepted their employment agreement. We do not recommend moving a candidate forward in the recruitment process until the employment agreement is signed, so that it’s on record in Workday that the employee has accepted their agreement.

To check this, from your job requisition, click on the candidate’s name to go to their Candidate Profile. Click on the related actions button > Business Process > Business Process Event History.

Hiring Former Workers

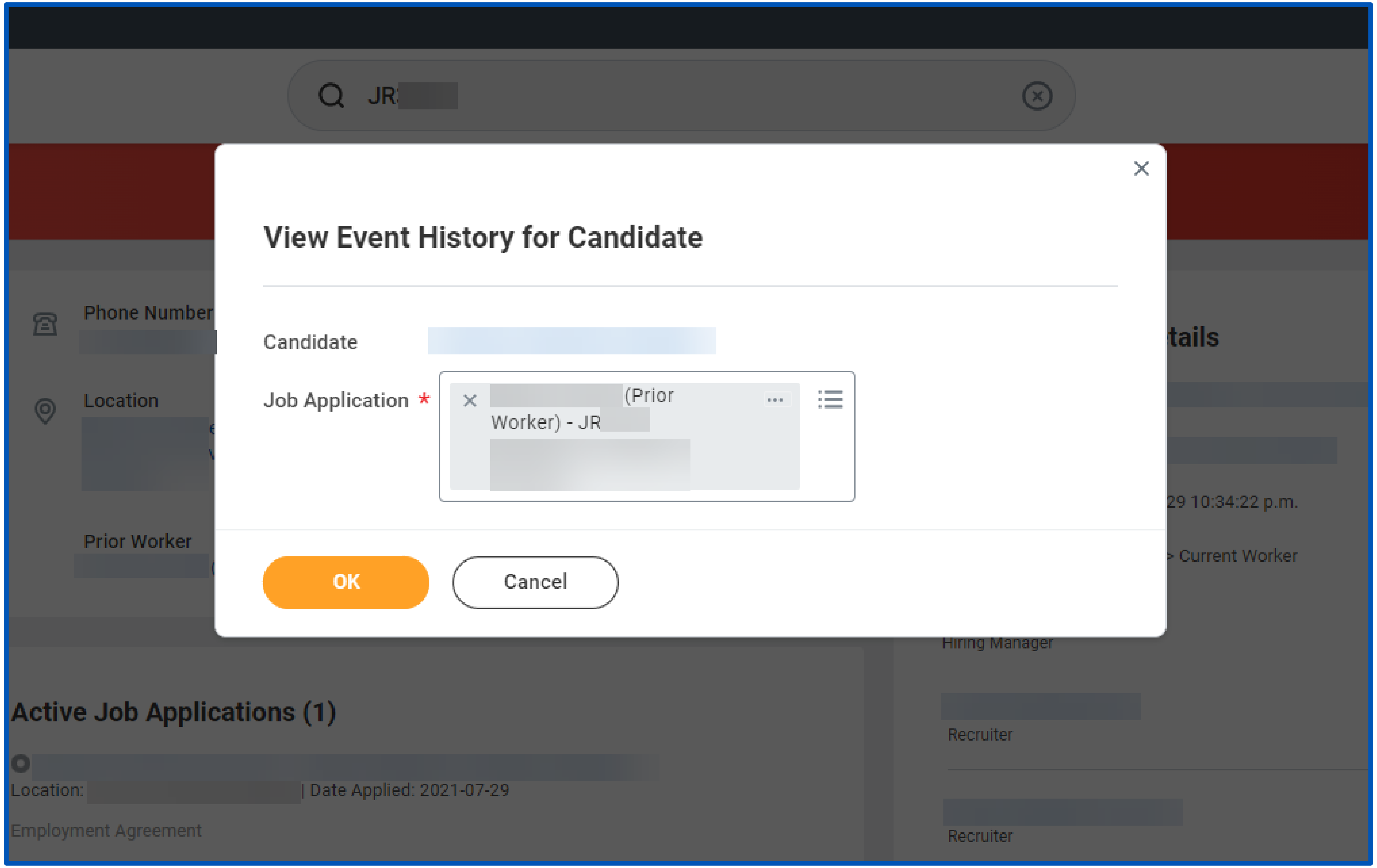
View Business Process Event History



Hiring Former Workers

View Event History for Candidate

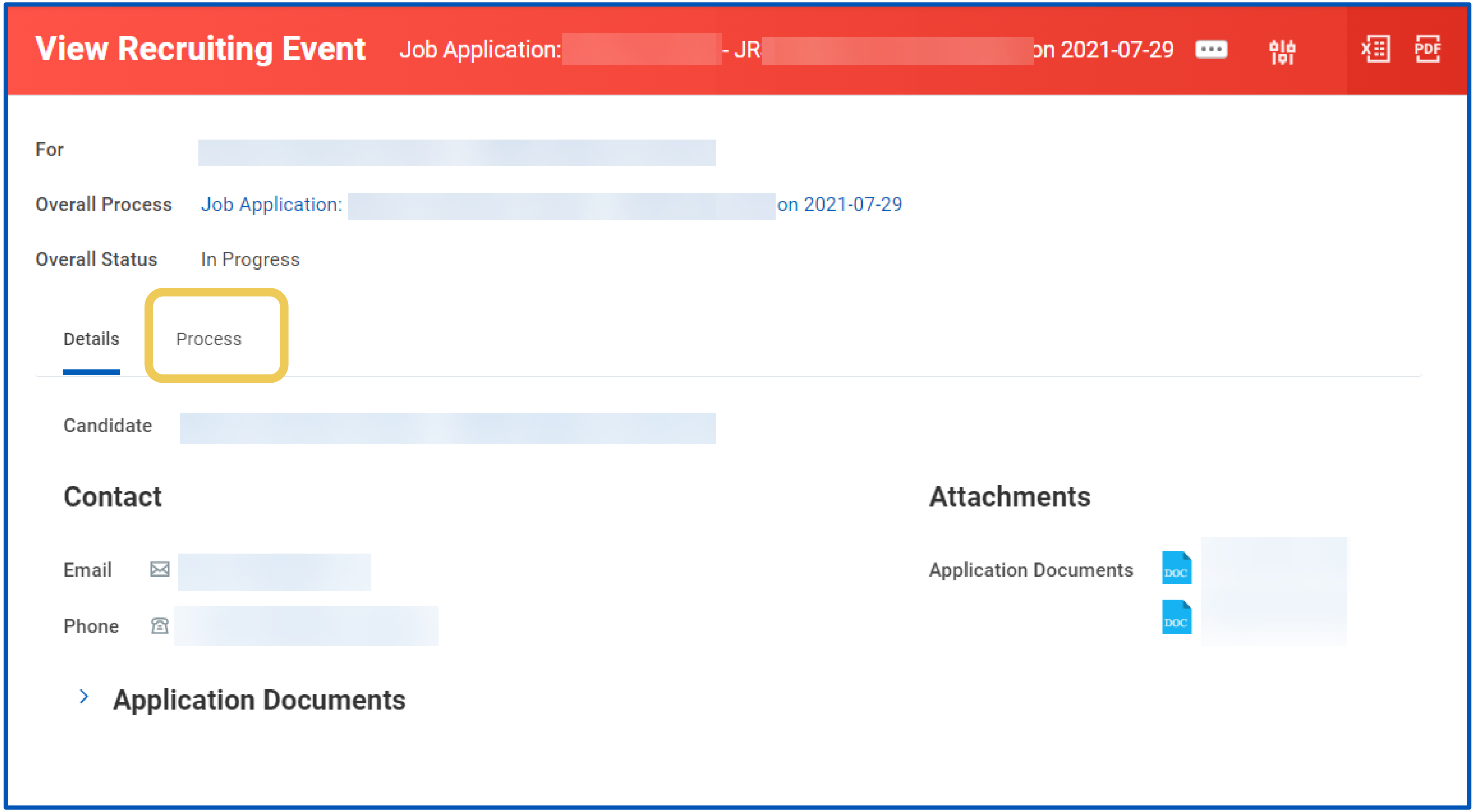
Choose the applicable job requisition from the drop down menu, if the employee had multiple applications, click OK.



Hiring Former Workers

View Recruiting Event

On the View Recruiting Event Page click on Process to see every step that the process has gone through up to today.



Hiring Former Workers

Process Tab

Scroll to the bottom of the table to see the latest steps. The very last step shows us that the process is currently at the Change Government Identifiers step and we can see that it is awaiting action for the Candidate. This is the step they are currently stuck at with a blank page.

The step above that is the Review Document step, it says the status is Step Completed by the Candidate, Andy Applicant, so we know we are safe to move the candidate forward. Again, make sure the candidate has completed this review documents step before moving their application forward.

Hiring Former Workers

Process Tab

Details Process

Process History 17 items

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Employment Agreement	Consolidated Approval by Manager (Supervisory)	Not Required				0	
Employment Agreement	Consolidated Approval by Central HR Partner (Mixed)	Not Required				0	
Employment Agreement	Consolidated Approval by HR Partner (Mixed)	Approved	2022-06-27 10:40:02 a.m.		(HR Partner (Mixed))	1	
Generate Document	Generate Document	Submitted	2022-06-27 10:41:27 a.m.		(Primary Recruiter (Supervisory))	1	
Employment Agreement	Review Documents	Step Completed	2022-06-27 01:08:12 p.m.		(Senior HR Partner (Mixed))	1	
Employment Agreement	Review Documents	Not Required				0	
Employment Agreement	Review Documents	Step Completed	2022-06-28 12:38:32 p.m.		(Central HR Partner (Mixed))	1	
Employment Agreement	Review Documents	Step Completed	2022-06-29 08:26:59 a.m.		Andy Applicant (Former Worker) (Candidate as Self)	1	
Employment Agreement	Change Government Identifiers	Awaiting Action			Andy Applicant (Former Worker) (Candidate as Self)	1	

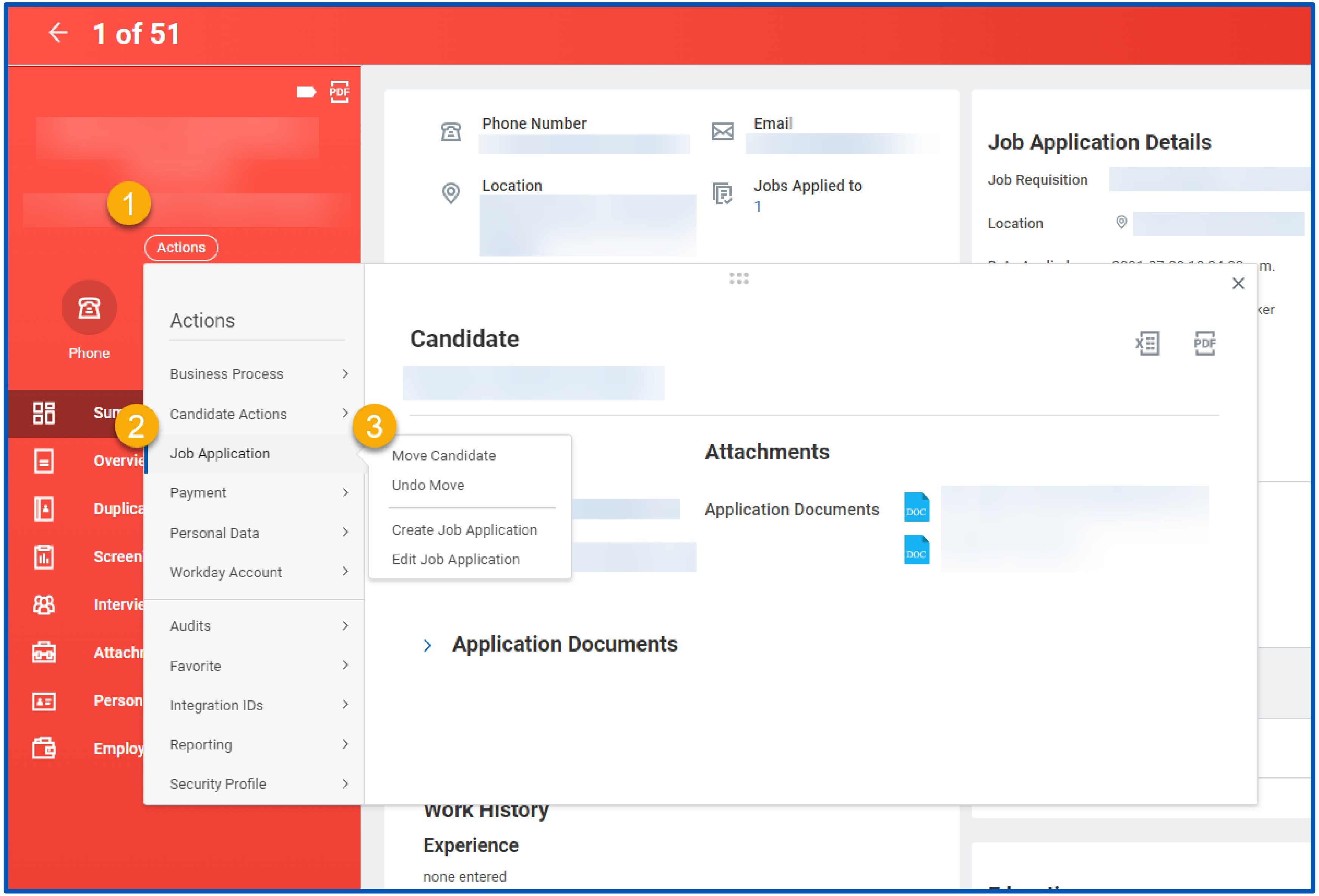
Remaining Process

Click on the button below to review remaining process details.

Hiring Former Workers

Process Tab

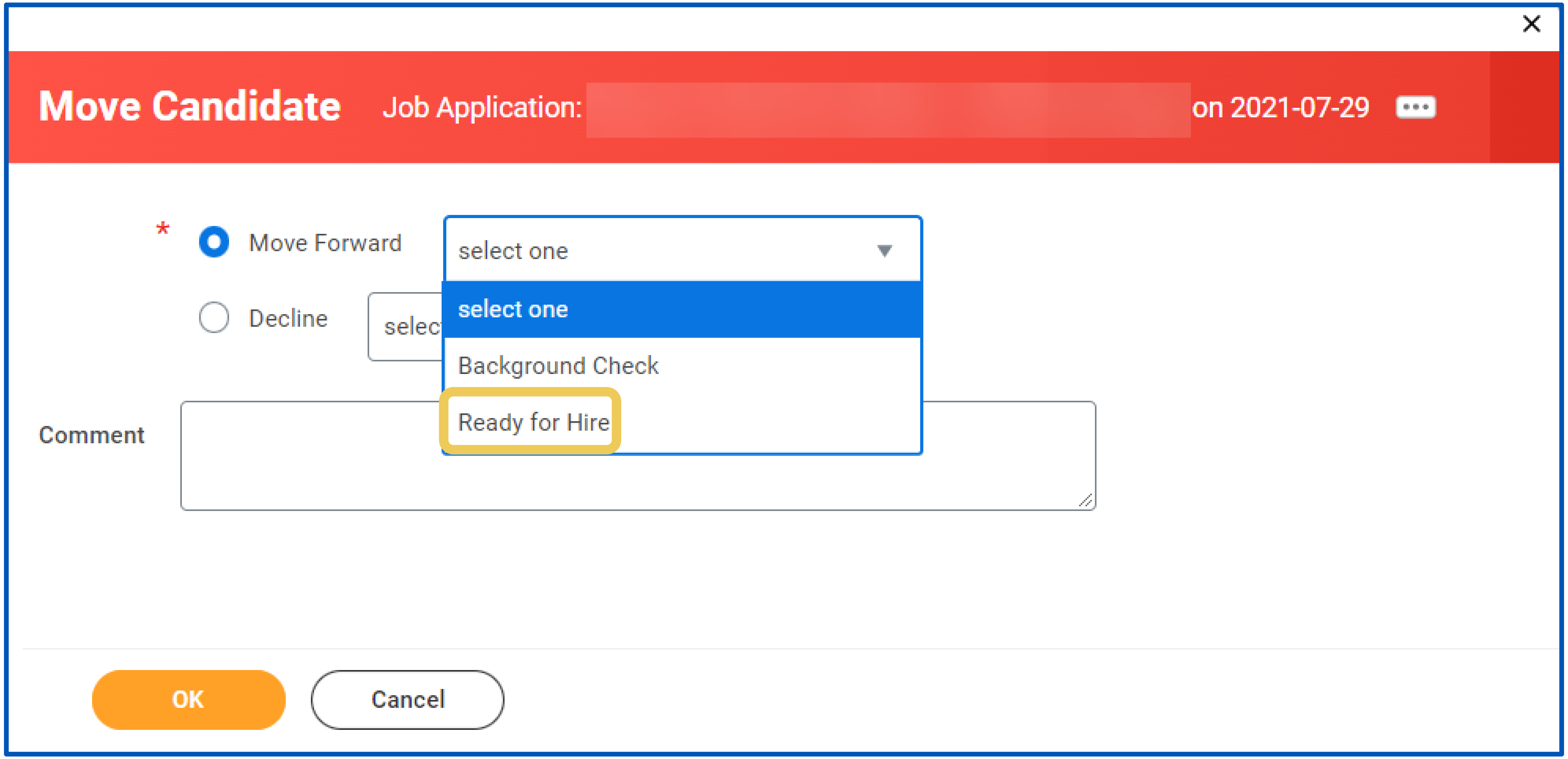
Next, to fix the issue, we go back to the Candidate's profile, click on Related Actions, Job Application, Move Candidate.



Hiring Former Workers

Move Candidate

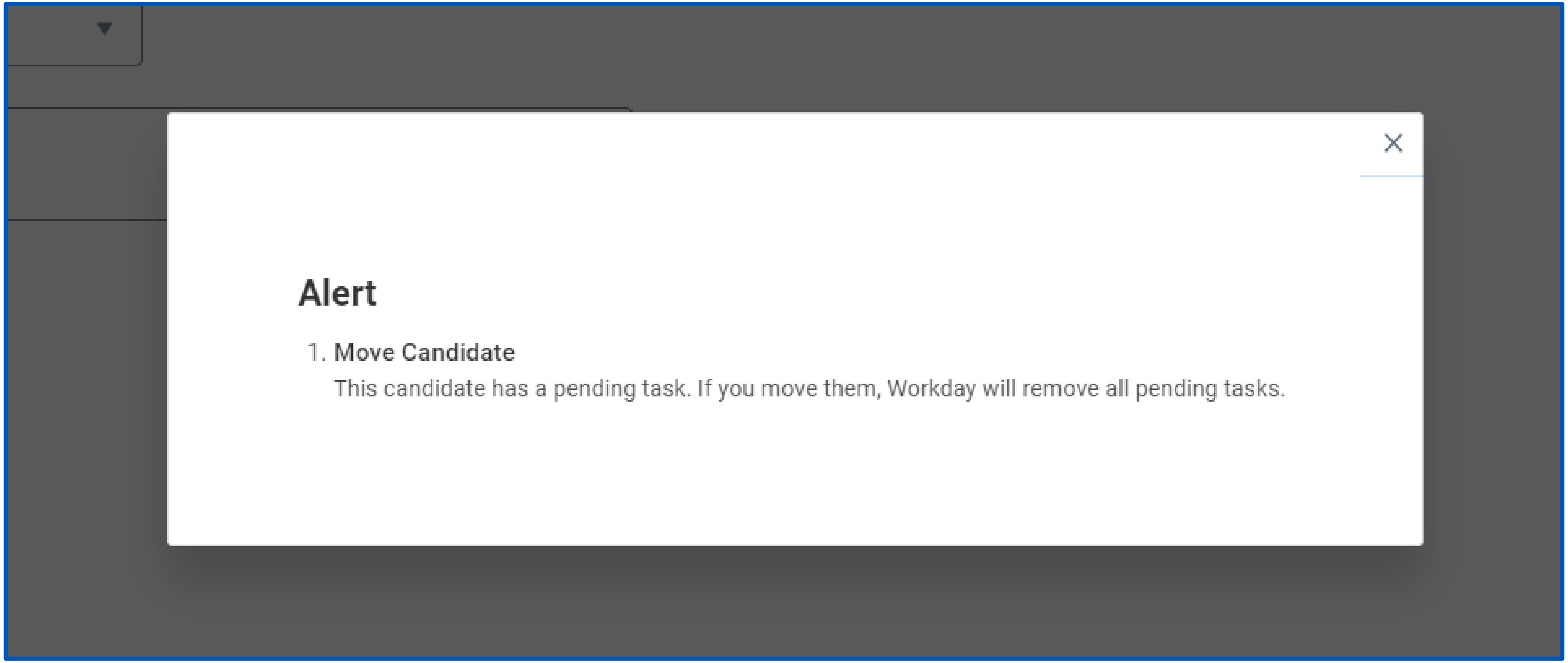
Click on the Move Forward option, and select Ready for Hire. Enter a comment explaining why you are moving the candidate forward and click OK.



Hiring Former Workers

Move Candidate

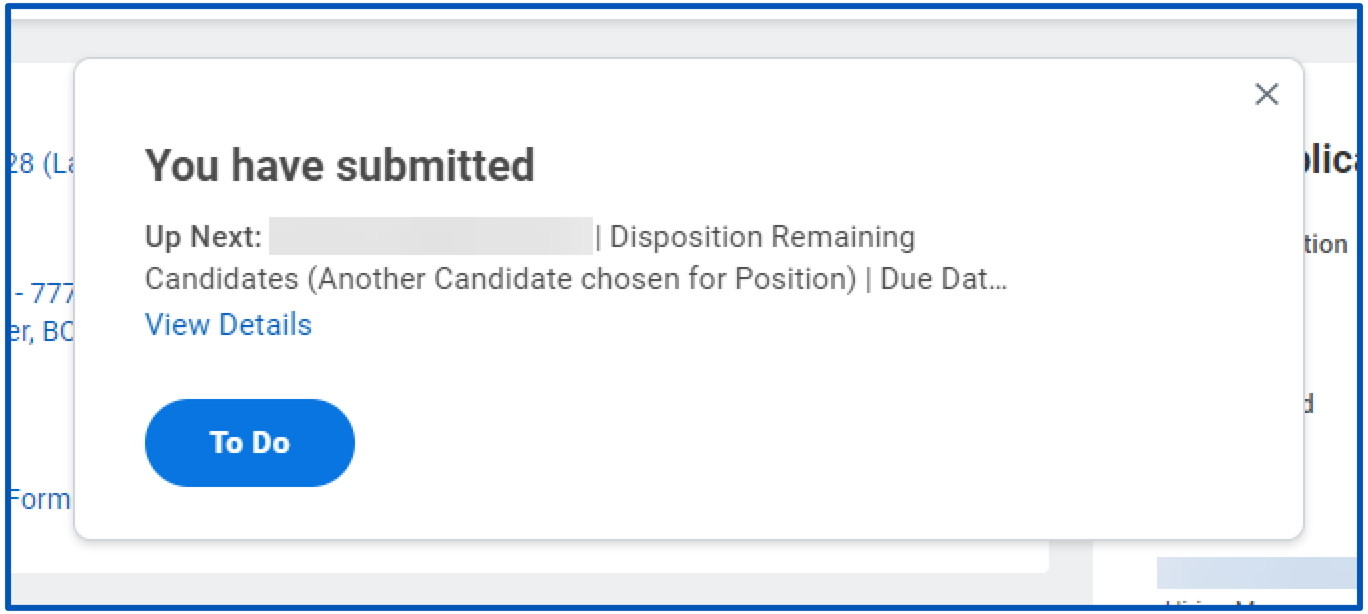
Next you can expect an orange alert to pop up, letting you know that moving the candidate will remove all pending tasks. That's exactly what we want to happen in this case, as the Change Government Identifiers task will be removed from the candidate. So, click OK to continue.



Hiring Former Workers

Move Candidate

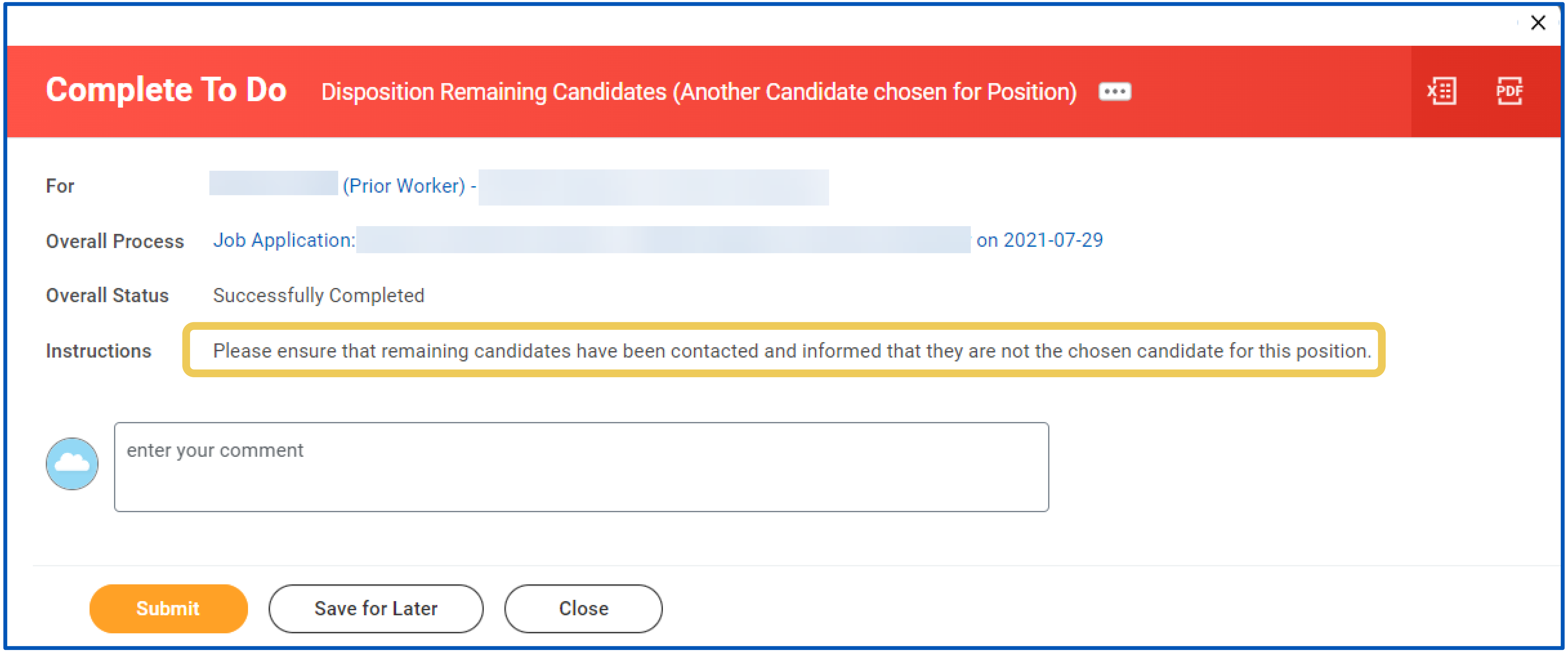
That takes us to the last step required for this job requisition and that is to Disposition Remaining Candidates.



Hiring Former Workers

Move Candidate

This step, if you open the task, is a reminder for you to contact any candidates that were moved to the interview stage or later in the recruitment process to inform them that they were not the successful candidate. We'll get into more detail about the automatic emails later in this presentation.

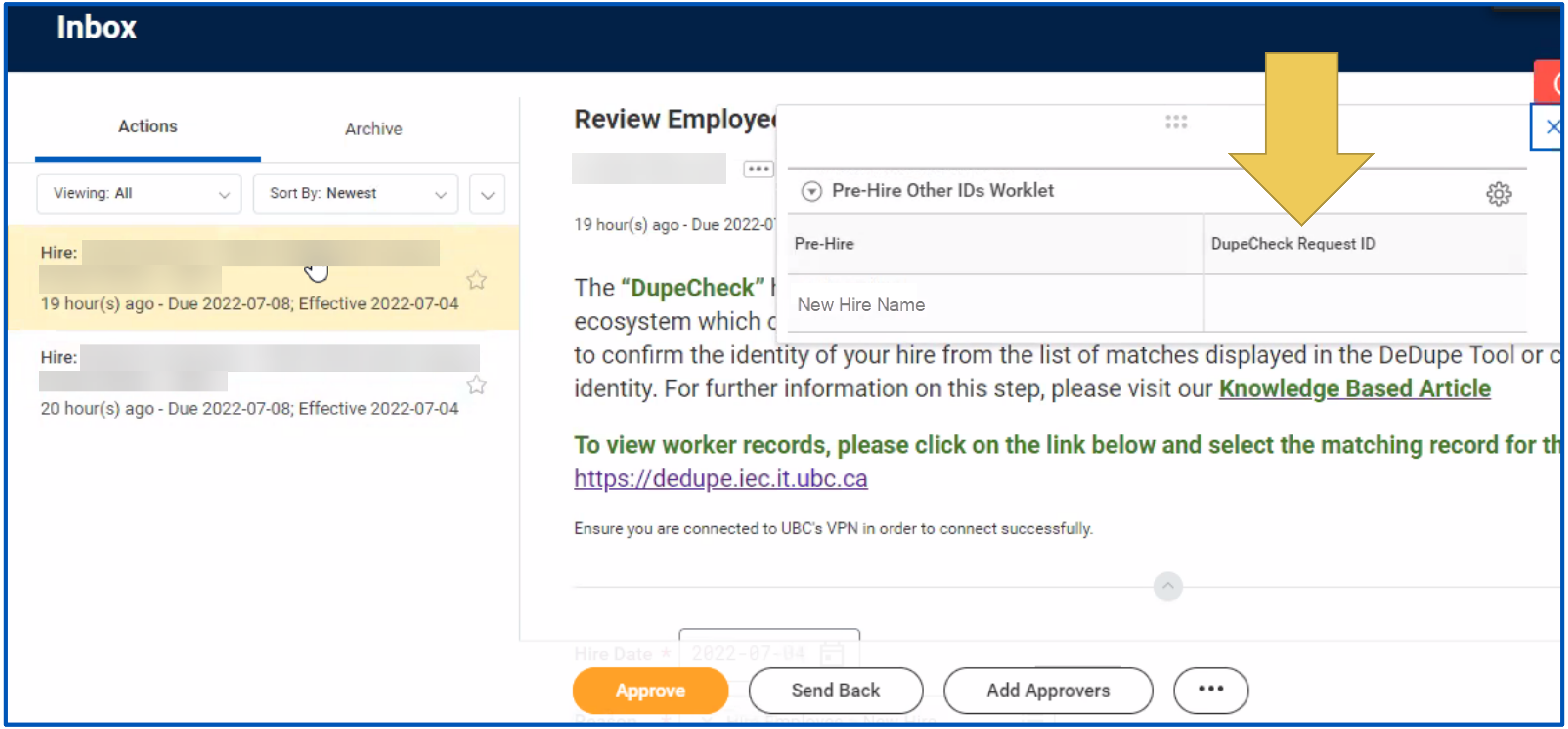


No Dupe Check Request ID?

Dupe Check Request ID

Review Employee Hire Page w/ Worklet

The next issue you may come across when hiring through recruitment is not having the Dupe Check Request ID show up on the Review Employee Hire page. It would look like this in your inbox. The worklet shows the new hire's name, but not the ID.



Reasons for Missing ID – Presentation Notes

The Request ID may be missing for a couple of reasons.

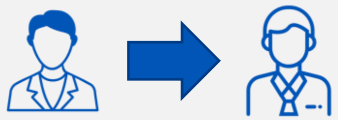
1. The employment agreement task was initiated by one person and then delegated to another individual. Workday is designed to send the request ID to the initiator of the process. Delegates are not able to see the ID because they technically didn't initiate the task.
2. There were multiple Primary Recruiters on the job requisition and multiple primary recruiters completed steps throughout the recruitment hire process (Because there are multiple primary recruiters in this scenario, WD doesn't know who to send the task to, so it ends up blank.)

We can't really avoid the scenarios when a delegate is set up, but we can avoid the situation with multiple primary recruiters, so we recommend:

A) Making sure only those that need the primary recruiter role have it, and

B) if there are multiple Primary Recruiters necessary, have only one person be responsible to complete the hire tasks.

1



Delegated EA Task

2

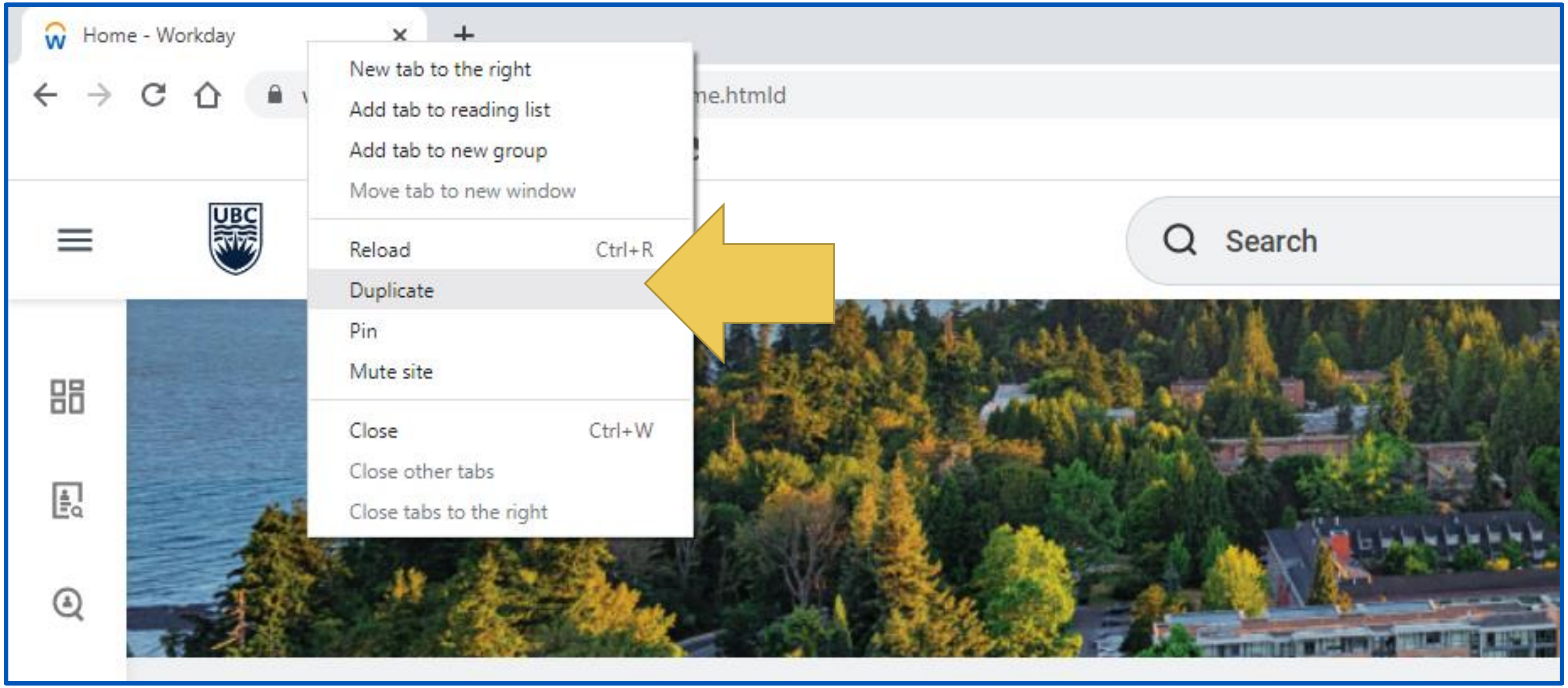
Multiple Primary Recruiters

Dupe Check Request ID

Duplicate Web Browser Tab

You can look up the Dupe Check Request ID in Workday instead of submitting Workday support request.

From your web browser, right-click on the tab labelled Home – Workday and select ‘Duplicate’ or ‘Duplicate Tab’. This will open the same Workday page in another browser tab, so you don’t lose your place in the hire.

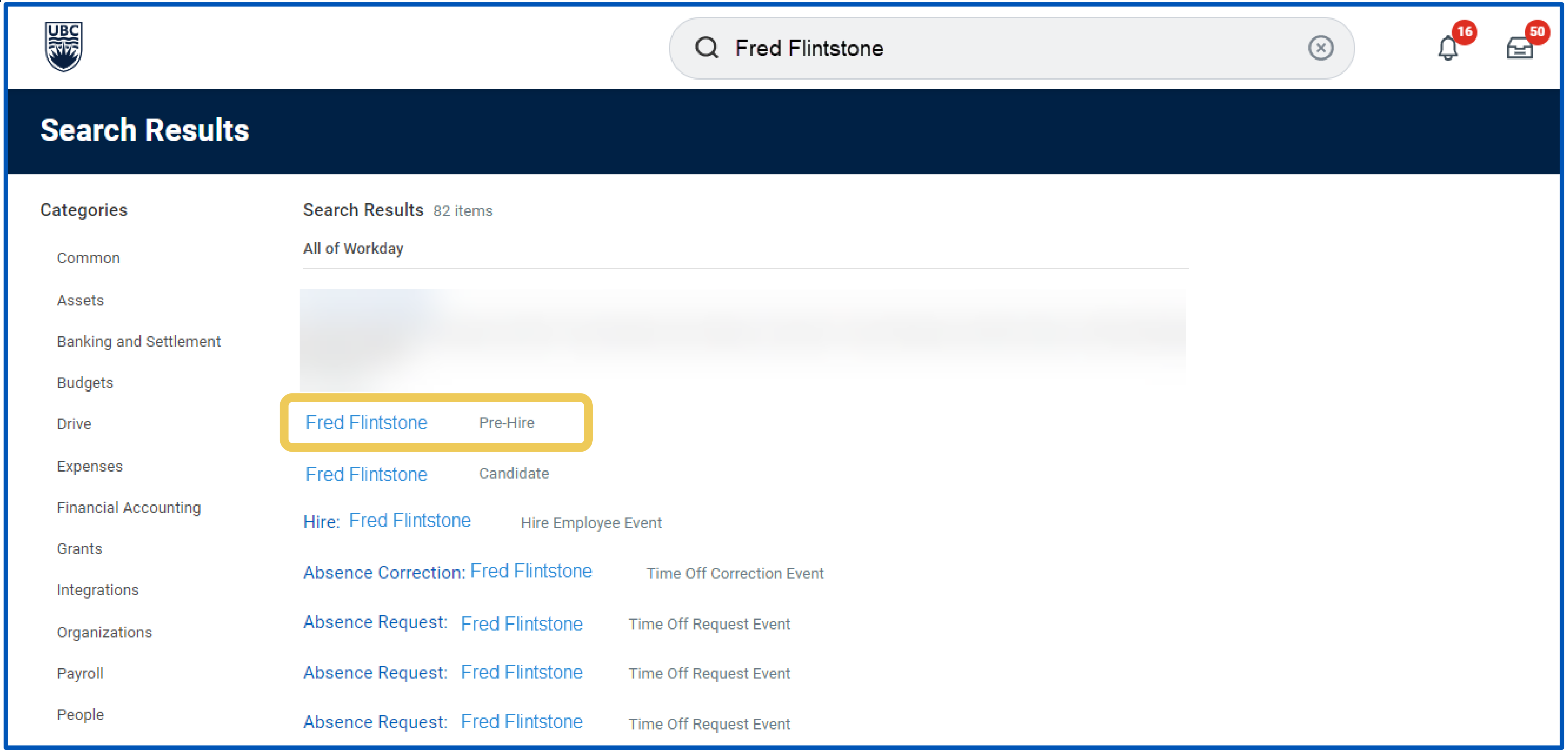


Dupe Check Request ID

Pre-Hire

Type the name of your new hire into the global search bar and in the results, click on their Pre-Hire record

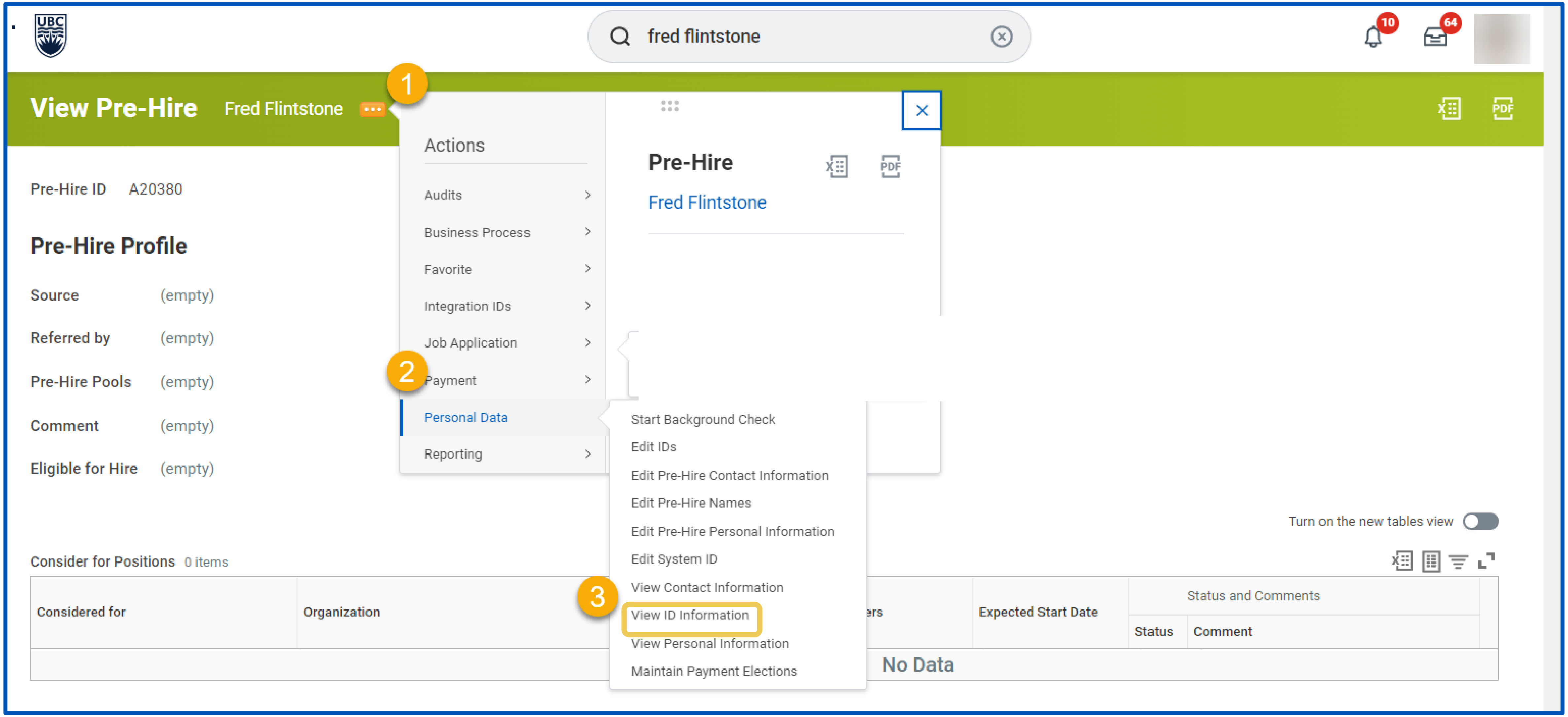
.



Dupe Check Request ID

Pre-Hire

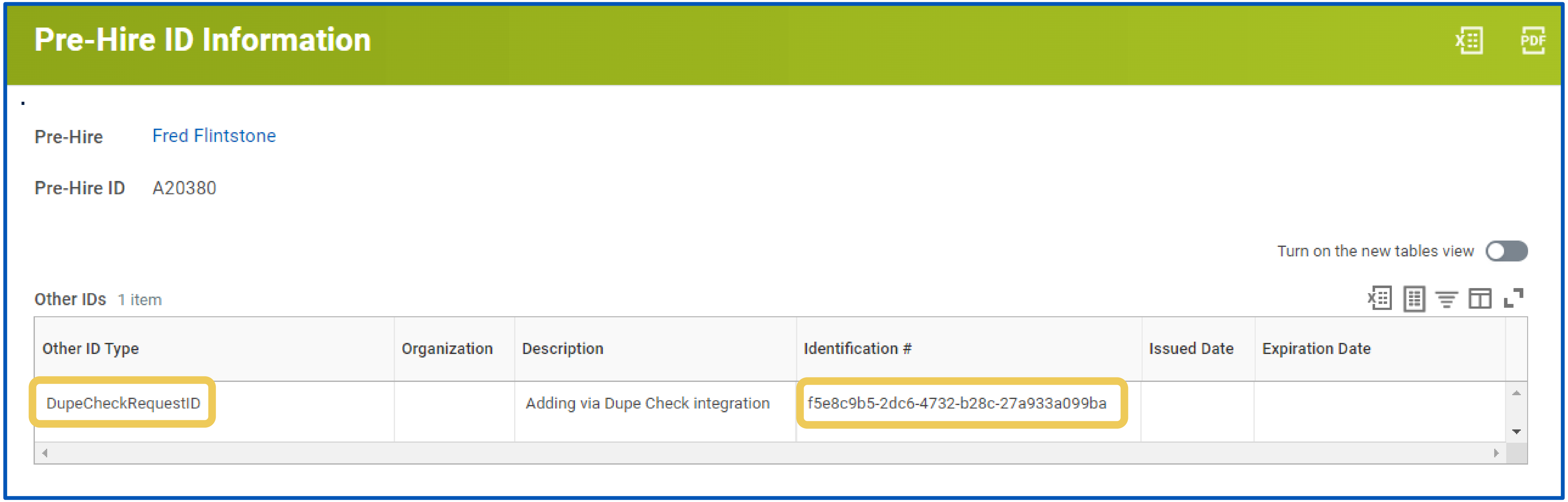
Under Related Actions (1), go to Personal Data (2), View ID Information (3).



Dupe Check Request ID

Pre-Hire

Here you'll see the Dupe Check Request ID that was generated and you can copy and paste it into the Dedupe tool to continue on with your hire.



Other ID Type	Organization	Description	Identification #	Issued Date	Expiration Date
DupeCheckRequestID		Adding via Dupe Check integration	f5e8c9b5-2dc6-4732-b28c-27a933a099ba		

Sending Back the Employment Agreement

Note: In recruitment, you can send back the offer letter/employment agreement for corrections. You can’t send it back if you used a direct hire, add job or change job transaction.

Send Back the Employment Agreement

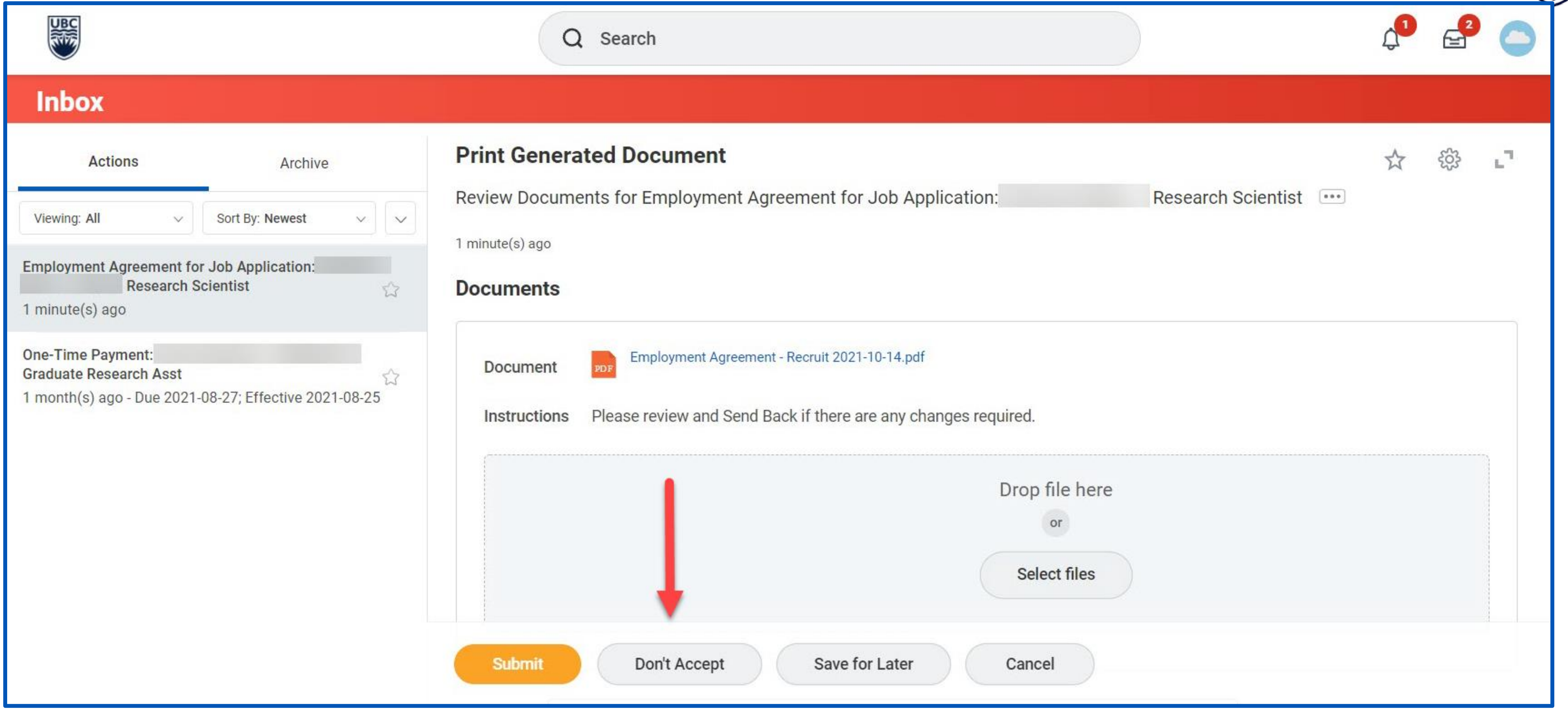
Approver Send Back

If the details of the employment agreement are incorrect, or out of date, each approver in the Recruitment workflow has the option to send back the employment agreement, as well as the candidate themselves.

To send it back, the approver would need to enter a comment explaining why the task is being sent back and then click the Don’t Accept button.

Send Back the Employment Agreement

Approver Send Back



[Recruitment Hire]

Review Redirect

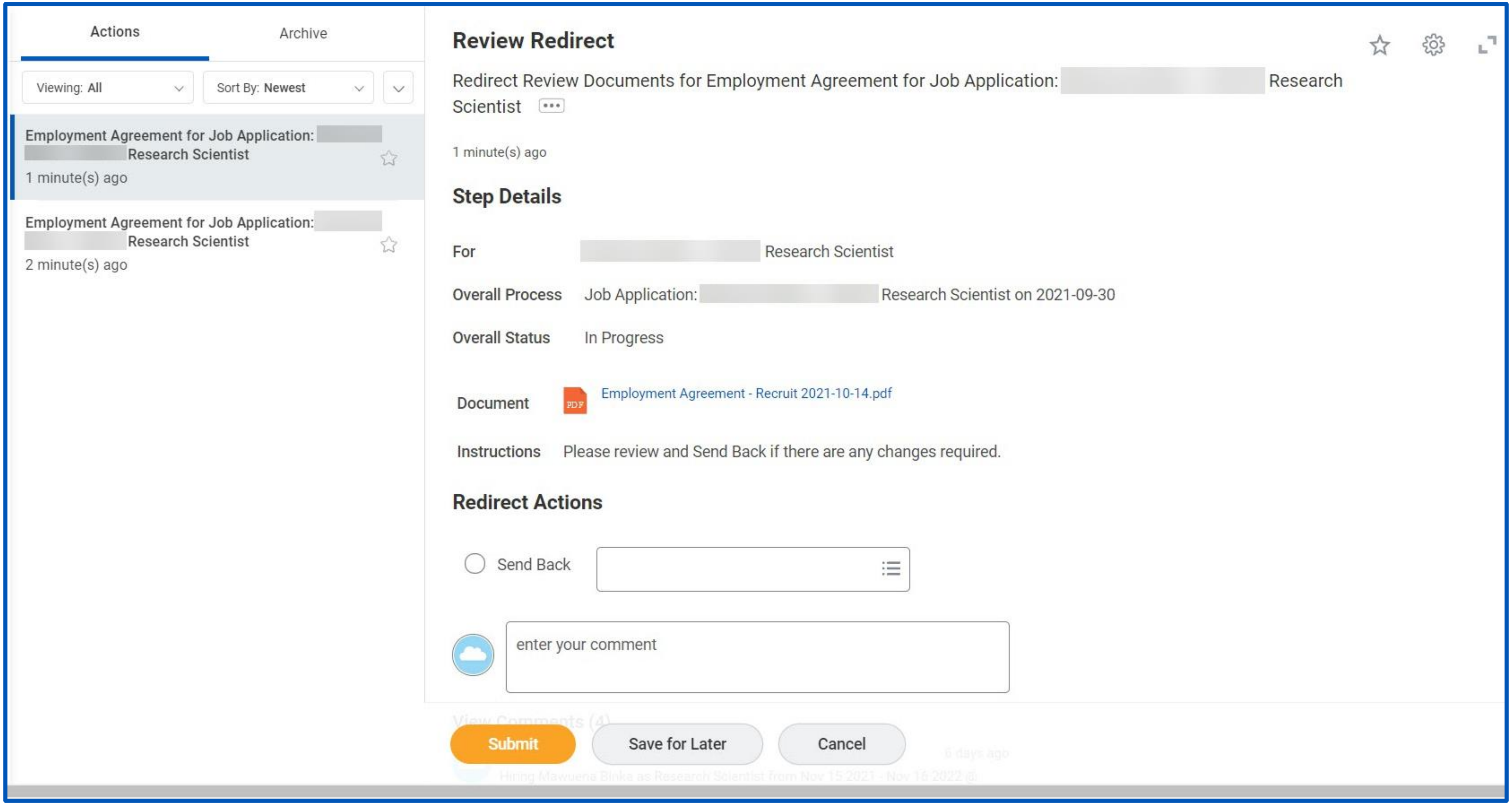
The Primary Recruiter will receive a task in their inbox called Review Redirect.

You can see the details of which job requisition this task applies to, plus a copy of the current employment agreement in a PDF attachment.

Under Redirect Actions, you’ll need to choose what recruitment stage to send this transaction back to.

Send Back the Employment Agreement

Review Redirect



Send Back the Employment Agreement

Review Redirect

The first option is **Employment Agreement:** allows you to edit/correct conditions of employment like the Hire Date, End Employment Date, and Compensation. These fields usually show as grey boxes on the Employment Agreement. So choose this step when you want to send the hire task back to the very beginning of the process.

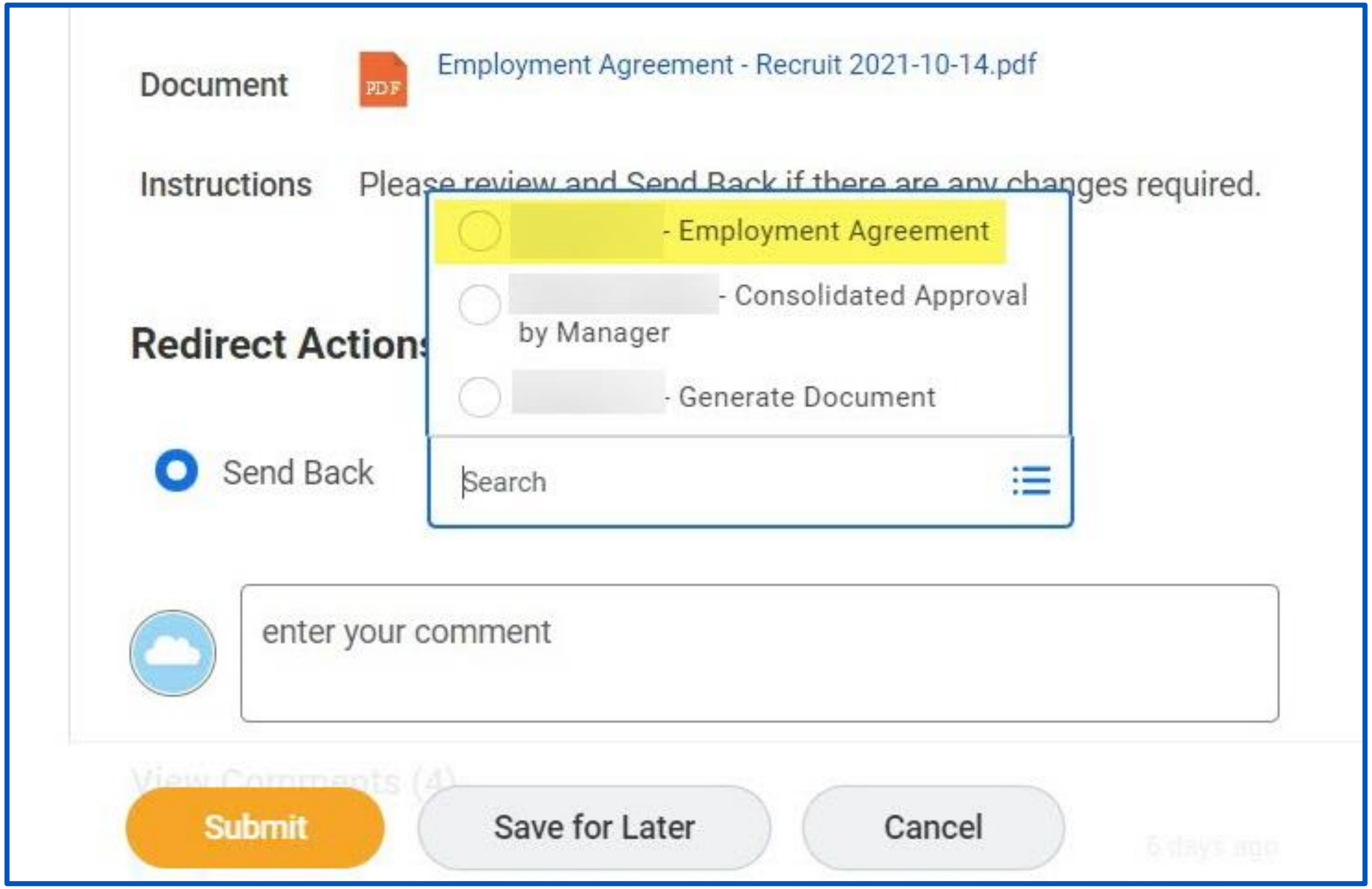
The second option is **Consolidated Approval by Manager:** allows you to send the event back to the manager for approval again. This option is not likely to be used as it doesn't allow for editing of details.

Thirdly, **Generate Document:** allows you to edit/correct wording on the employment agreement letter. Use this option if the conditions of employment are correct, and you just need to correct text in the letter only. If you need to change details in the grey fields, use the Employment Agreement step.

Once the process is submitted again after making changes, it will continue through approval and action steps as normal and make its way back to the employee to accept.

Send Back the Employment Agreement

Review Redirect



Recruitment Notifications to Candidates

Recruitment Notifications Map

Emails & Notifications

- Primary Recruiter must take action
- Automatic email
- All candidates
- Internal candidates

All Candidates

- Thank you for your application!
- Workday Bell Notification

Faculty

Staff & Students

Candidates Manually Declined
Job Req Closed/Cancelled

- Recruitment for Position: "Position Title" has been Cancelled.

Staff & Students

Unsuccessful Candidates
Job Req is Filled

- Your application to the Position: "Open Position Title"
  - Candidates manually declined with a reason of *Does Not Meet Qualifications*
  - Candidates in the *Application Received, Screen, or Assessment Stage* when the Successful Candidate is Hired

** See next slide*

Staff & Students

Successful Candidate

- Offer Letter Available for Review
  ** In Candidate Home*
- Employment Agreement Available for Review + Workday Bell Notification

Staff & Students

Attend the **Hiring – Best Practices for Direct Hires** session for more info on CWL & Welcome to UBC Emails!

Managing the Job Requisition

Recruitment Notifications Map – Presentation Notes

All candidates that apply to any job posting (faculty, staff or student) will receive an automatic email thanking them for their application as confirmation that their application was received. Internal candidates additionally receive a notification in Workday. Note that this is the only automatic email that faculty candidates will receive from Workday. Faculty applicants do not receive any other automatic messaging unless they are the successful candidate.

The next email is when a job requisition is closed or cancelled because you won't be filling the position anymore. You've decided not to continue recruiting for it. This box is light blue indicating that the Primary Recruiter has to manually take action in order for this email to go out. The Primary Recruiter must close the job requisition and decline the applicants with a reason of "Job Req Closed or Cancelled" and only candidates that are declined with this specific reason will receive an automatic email letting them know that recruitment has been cancelled.

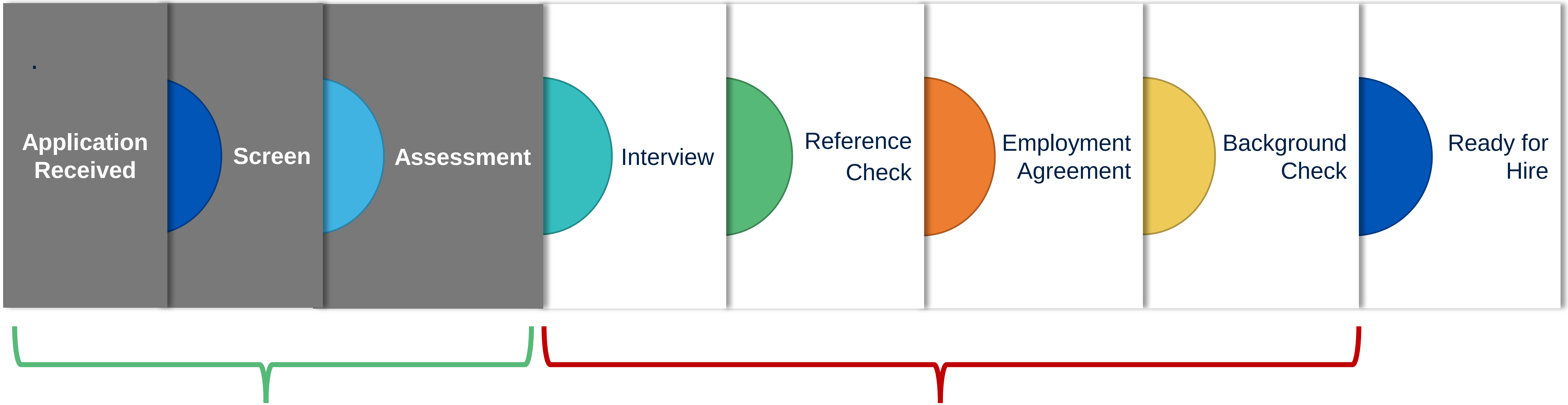
Unsuccessful candidates: If you are shortlisting candidates and declining them individually with a reason of "Does Not Meet Qualifications" an automatic regret email will be sent to that candidate. Additionally, once you've hired your successful candidate and moved them to the ready for hire stage, all remaining candidates will be dispositioned with a reason of 'Job Requisition has been filled.' However, only candidates in the Application Received, Screen, or Assessment stage will receive an automatic regret email. Those in the interview stage or later will NOT receive an email. This is why you receive a To Do task at the end of recruitment to Disposition Remaining Candidates - to ensure you contact candidates directly, outside of Workday, if they won't receive an automatic email.

Lastly, the successful candidate will receive an email letting them know they have an offer letter to accept via Candidate Home. Internal candidates also receive an email plus a bell notification in Workday. All new hires will then receive additional emails regarding their CWL and onboarding tasks.

Recruitment Notifications Map

Emails & Notifications

When you hire your successful candidate, candidates remaining in the Application Received, Screen, or Assessment stages will receive an automatic regret email. Candidates in the interview stage or later do not receive any automatic emails.



Receive Automatic Regret Email

Do NOT Receive Automatic Regret Email

(Contact these candidates outside of Workday)

Appendix

QUICK TAKEAWAYS

SECURITY ROLES

Managers don't need the Primary Recruiter security role unless they are processing the hire

Make sure your job req always has a Primary Recruiter assigned

EDITING THE JOB REQ

Edit the job req BEFORE moving the candidate to the Employment Agreement stage

REPOSTING

If you are changing details on the job requisition you must unpost and repost for the change to show on the job posting

Minimum posting requirements still apply when reposting

EXTENDING A JOB POSTING

You must unpost and repost your job in order for the new posting end date to show on the career site

HIRING YOUR SUCCESSFUL CANDIDATE

Always check for duplicate records BEFORE moving the candidate to the Employment Agreement stage (especially if the Previous Worker column says 'yes')

Use the Recruitment Candidate Guide!

DUPE CHECK REQUEST ID IS BLANK?

Search for the new hire's Pre-Hire record and look for the ID under Personal Data > View ID Information

ERRORS IN THE RECRUITMENT OFFER LETTER

Any approver can choose 'Don't Accept' to send the offer letter back to the Primary Recruiter to make changes

NOTIFICATIONS

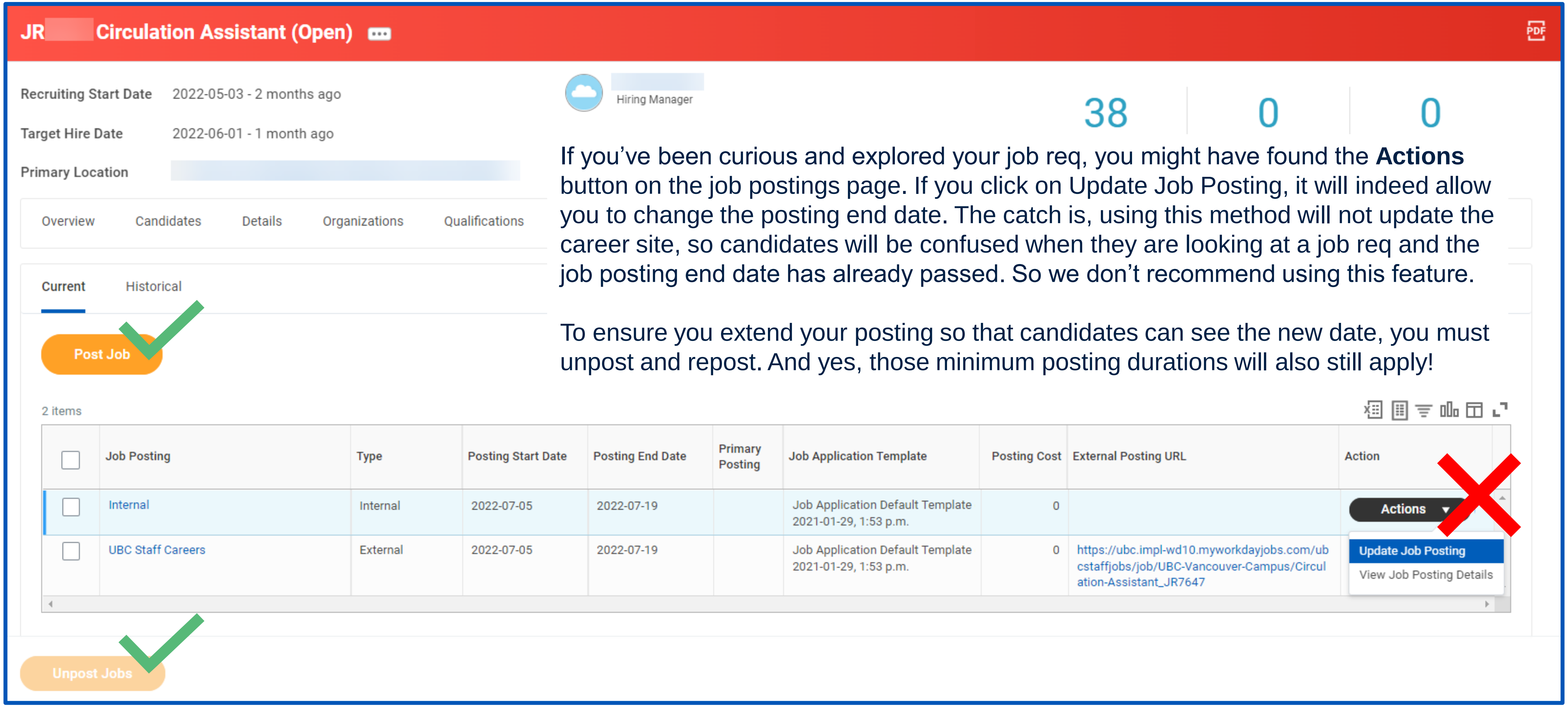
Automatic regret emails are sent to candidates in the Application Received, Screen, and Assessment stages once the successful candidate is hired. Candidates in the interview stage or later do not receive any automatic emails and must be contacted directly

Extending a Job Posting

Note: To properly extend a job posting, you will also need to unpost and repost your job requisition, for the same reason as when you edit. To extend a job posting you have to change the Posting End Date and for that new posting end date to appear on the career site, you must unpost and repost.

Extending a Job Posting

Troubleshooting Errors



If you've been curious and explored your job req, you might have found the **Actions** button on the job postings page. If you click on Update Job Posting, it will indeed allow you to change the posting end date. The catch is, using this method will not update the career site, so candidates will be confused when they are looking at a job req and the job posting end date has already passed. So we don't recommend using this feature.

To ensure you extend your posting so that candidates can see the new date, you must unpost and repost. And yes, those minimum posting durations will also still apply!

Extend a Job Posting

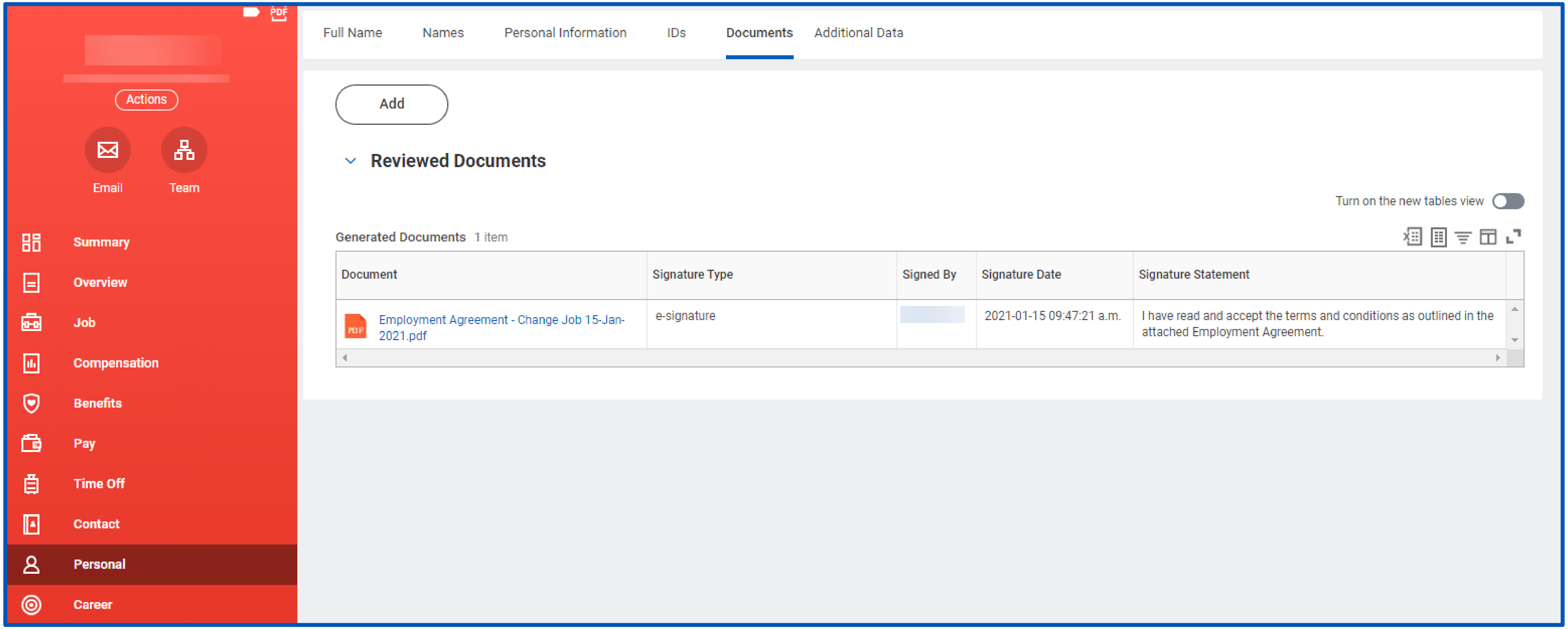
Visibility of Employment Agreements Generated Through Recruitment

Recruitment Employment Agreement

Worker Profile > Personal > Documents

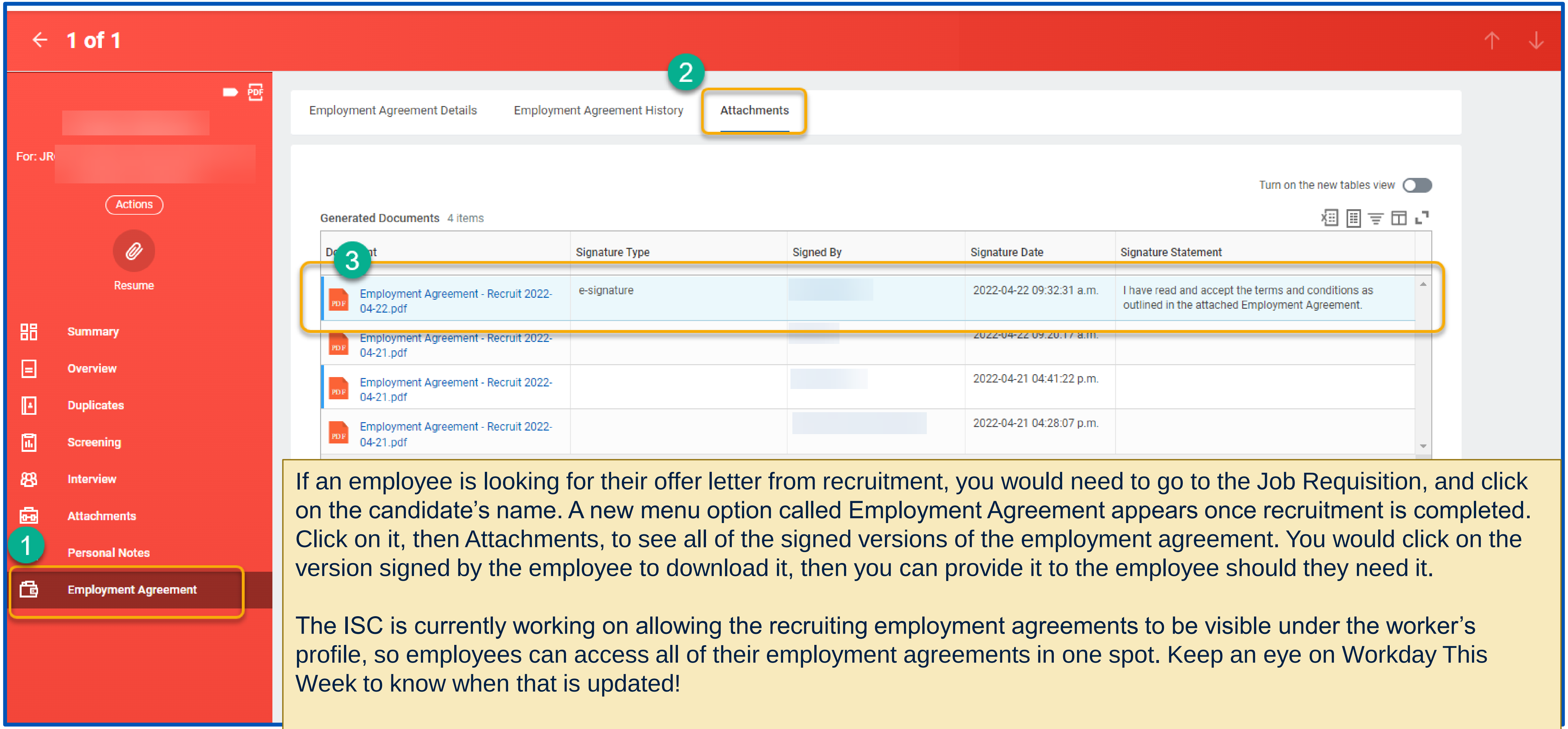
Employment agreements generated through Workday automatically show up on employees' profiles under Personal > Documents.

However, only employment agreements generated through direct business processes will appear on this page (e.g. employment agreements for a change job, or hire not completed through recruitment). Currently, Employment agreements that were generated through the recruitment process will not show here.



Recruitment Employment Agreement

Job Requisition > Candidate Profile > Employment Agreement > Attachments



If an employee is looking for their offer letter from recruitment, you would need to go to the Job Requisition, and click on the candidate's name. A new menu option called Employment Agreement appears once recruitment is completed. Click on it, then Attachments, to see all of the signed versions of the employment agreement. You would click on the version signed by the employee to download it, then you can provide it to the employee should they need it.

The ISC is currently working on allowing the recruiting employment agreements to be visible under the worker's profile, so employees can access all of their employment agreements in one spot. Keep an eye on Workday This Week to know when that is updated!

Job Application – Question from Slido

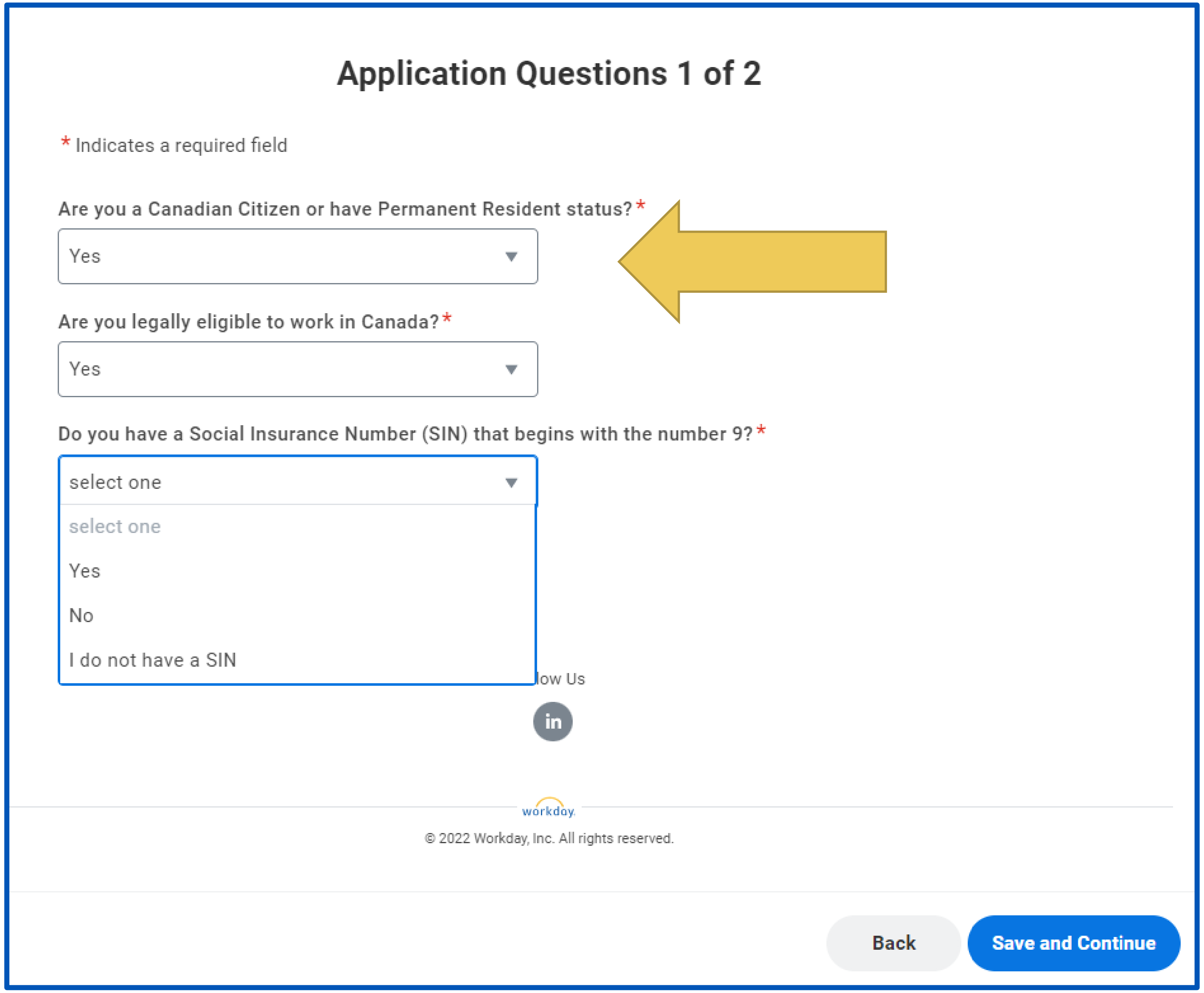
Questions

A question WD asks applicants is something like "Are you legally eligible to work?"

The question is not specific enough and is often misinterpreted by applicants.

Asking "Do you have a valid Canadian work permit/SIN?" would be much more clear and helpful.

Can ISC/HCM please consider this change?



Application Questions 1 of 2

* Indicates a required field

Are you a Canadian Citizen or have Permanent Resident status?*

Yes

Are you legally eligible to work in Canada?*

Yes

Do you have a Social Insurance Number (SIN) that begins with the number 9?*

select one

select one

Yes

No

I do not have a SIN

low Us

workday

Back

Save and Continue

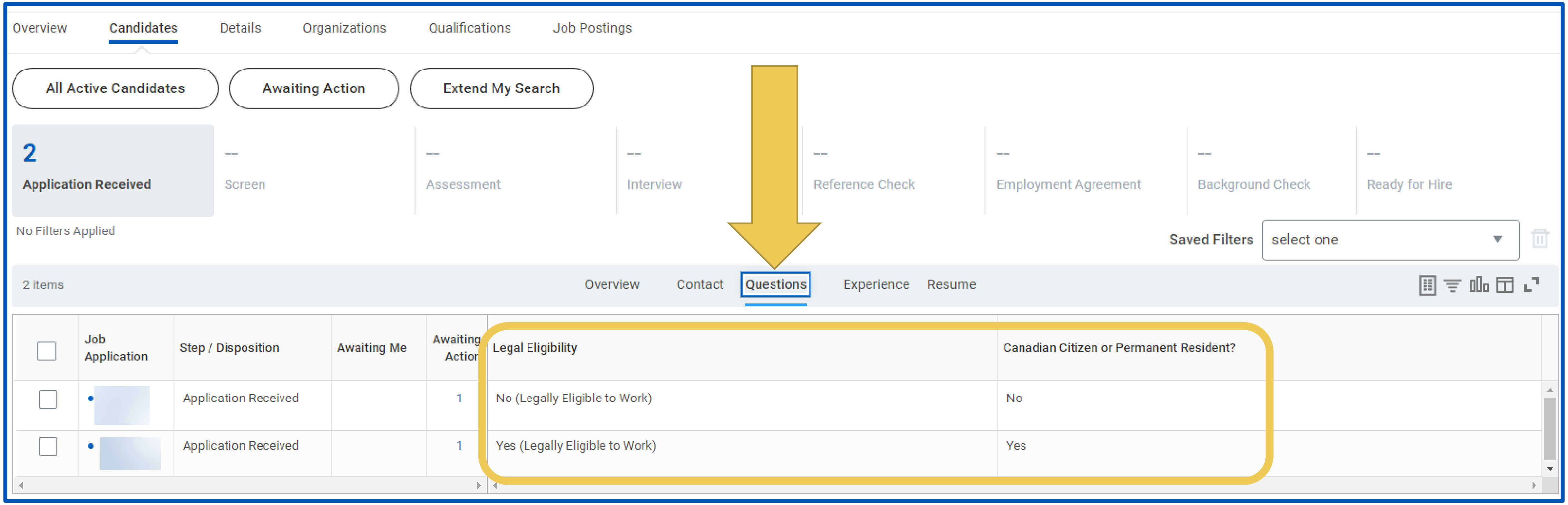
A:

Faculty applications ask:

- Are you a Canadian Citizen or have Permanent Resident status?
- Are you legally eligible to work in Canada?
- Do you have a SIN that begins with the number 9?

Job Application – Question from Slido

Questions



A:

The candidates' answers to the legal eligibility and Canadian Citizen/Permanent Resident questions are visible on the candidate grid

Recruitment Notifications

Emails & Notifications

ALL APPLICANTS

Confirmation of Application

1. Automatic email sent to internal and external applicants

   Workflow Notification: Entry of a - Job Application notifies Candidate as Self
   Subject: Thank you for your application!
   Notification Message:

   Dear "First Name",

   Thank you for submitting your application for the position of "Open Position Title" at the University of British Columbia!

   Your application has been received and will be reviewed by the selection committee.
   Should you be selected to move forward in the recruitment process, a member of the selection committee will be in contact with you.

   We appreciate your interest in UBC and wish you the best of luck in your search.

   Sincerely,
   UBC Recruiting Team

2. Automatic notification sent to internal candidates (bell notification)

   Workflow Notification: Entry of a - Job Application notifies Candidate as Self
   Subject: Job Application: NAME (Internal) - JRXXXX Job Posting Title on DATE
   Notification Message:

   Dear “First Name”, Thank you for submitting your application for the position of “Open Position Title” at the University of British Columbia!

   Your application has been received and will be reviewed by the selection committee.

   Should you be selected to move forward in the recruitment process, a member of the selection committee will be in contact with you.

   We appreciate your interest in UBC and wish you the best of luck in your search.

   Sincerely, UBC Recruiting Team

   Details “Link to Job Application Event”

Recruitment Notifications

Emails & Notifications

DECLINED APPLICANTS

Applicants Manually Declined with the Reason of "Job Requisition Closed or Cancelled"

1. Does not apply to Faculty Job Requisitions
2. Automatic email sent to candidates when a job requisition will no longer be recruited for. The Primary Recruiter must manually decline candidates with a reason of "Job Requisition Closed or Cancelled" for the email to be sent.

Workflow Notification: Denied notifies Candidate as Self
Subject: Recruitment for Position: "Open Position Title" has been Cancelled.
Notification Message:

Dear "First Name",

Thank you for your interest in the above position at the University of British Columbia.

We regret to inform you that after careful consideration and deliberation, the department has decided to cancel the competition and will no longer be recruiting for this position at this time.

We appreciate you taking the time to forward your application and hope that you continue to check our website and apply for future positions.

Sincerely,

UBC Recruiting Team

Recruitment Notifications

Emails & Notifications

UNSUCCESSFUL APPLICANTS

Unsuccessful Applicants Automatically Emailed Once a Job Requisition is Filled

1. Does not apply to Faculty Job Requisitions
2. Automatic email sent to candidates in the Application Received, Screen, or Assessment stage and are declined by the Primary Recruiter with a reason of “Does Not Meet Qualifications”
3. Automatic email sent to candidates in the Application Received, Screen, or Assessment stage and are automatically dispositioned with a reason of “Job Requisition has Been Filled” after the successful candidate is hired in Workday

Workflow Notification: Denied notifies Candidate as Self
Subject: Your application to the Position: "Open Position Title"
Notification Message:

Dear "First Name",

We regret to inform you that after careful consideration and deliberation, the selection committee has chosen another applicant whose qualifications, skills, ability and relevant experience more closely match the needs of this position.

We appreciate you taking the time to forward your application and hope that you continue to check our website and apply for future positions.

Sincerely,

UBC Recruiting Team

Recruitment Notifications

Emails & Notifications

SUCCESSFUL APPLICANT

Accepting the Employment Agreement

1. Automatic email sent to external applicant with a Candidate Home Account

   Workflow Notification: Entry of Review Documents step (i1c) notifies Candidate as Self
   Subject: Offer Letter Available for Review
   Notification Message:

   Dear "First Name"

   We are pleased to send you this Offer of employment.

   The offer is available in your Candidate Home. Click the following link to review and accept "External Site Homepage Link" . If you have any questions, please do not hesitate to contact us.

   UBC Human Resources

2. Automatic email sent to external applicant without a Candidate Home Account

   Workflow Notification: Entry of Review Documents step (i1c) notifies Candidate as Self
   Subject: Offer Letter Available for Review
   Notification Message:

   Dear "Candidate Global Name"

   We are pleased to send you this Offer of employment.

   The offer is available in your Candidate Home but it looks like you have not yet created your Candidate Home account. Using the following link , select "Create new account" "Create Candidate Home Account URL" . IMPORTANT - Make sure that your username matches the email address used to send you this message.

   Once your account is created. Go to your profile (right-hand corner of the screen) and look for tasks that require your attention.

   If you have any questions, please do not hesitate to contact us.

   UBC Human Resources

Recruitment Notifications

Emails & Notifications

SUCCESSFUL APPLICANT

Accepting the Employment Agreement Continued

3. Automatic email sent to internal applicant

Workflow Notification: Entry of Review Documents step (i1c) notifies Candidate as Self
Subject: Employment Agreement Available for Review.
Notification Message:

Dear "First Name"

Your Employment Agreement is now available in your Workday inbox.

Please do not hesitate to contact us if you have any questions.

UBC Human Resources

4. Automatic notification sent to internal applicant (bell notification)

Workflow Notification: Entry of Review Documents step (i1c) notifies Candidate as Self
Subject: Employment Agreement for Job Application: NAME (Internal) - JRXXXX Job Posting Title
Notification Message:

Dear "First Name"

Your Employment Agreement is now available in your Workday inbox.

Please do not hesitate to contact us if you have any questions.

UBC Human Resources

Details “Link to Job Application Event”

Workday Knowledge Base Articles

Visit the UBC Workday Knowledge Base for more guides.

- Create Job Requisition and Post
- Extend a Job Posting
- Managing the Job Requisition
- How to Link a Candidate to a Job Requisition
- Copy a Candidate Application to Another Job Requisition
- Recruitment Candidate Guide
- Recruitment Hire
- Apply for an Internal Job Posting
- Withdraw My Application from an Internal Job