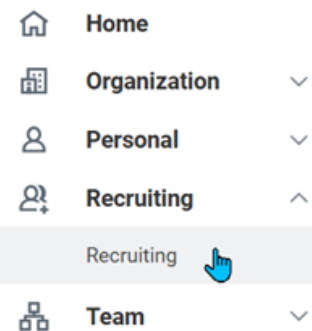**Introduction**

Workday Recruiting is Willamette's applicant tracking system used for faculty and staff positions. Hiring managers will use the system to gather and review applications and move candidates through the "recruiting pipeline," from application, to interviewing, to hiring. It should be noted that scheduling, interviewing and assessing candidates to move forward in the hiring process are typically managed outside of the Workday system.

Navigating to Workday Recruiting

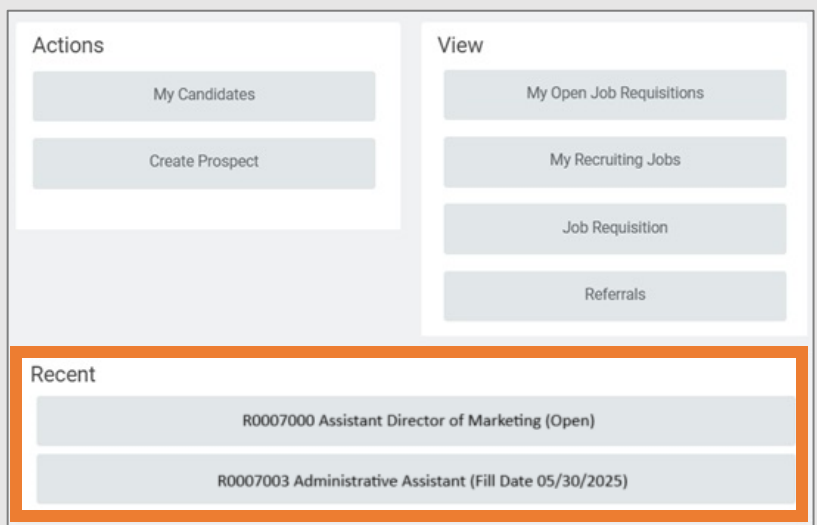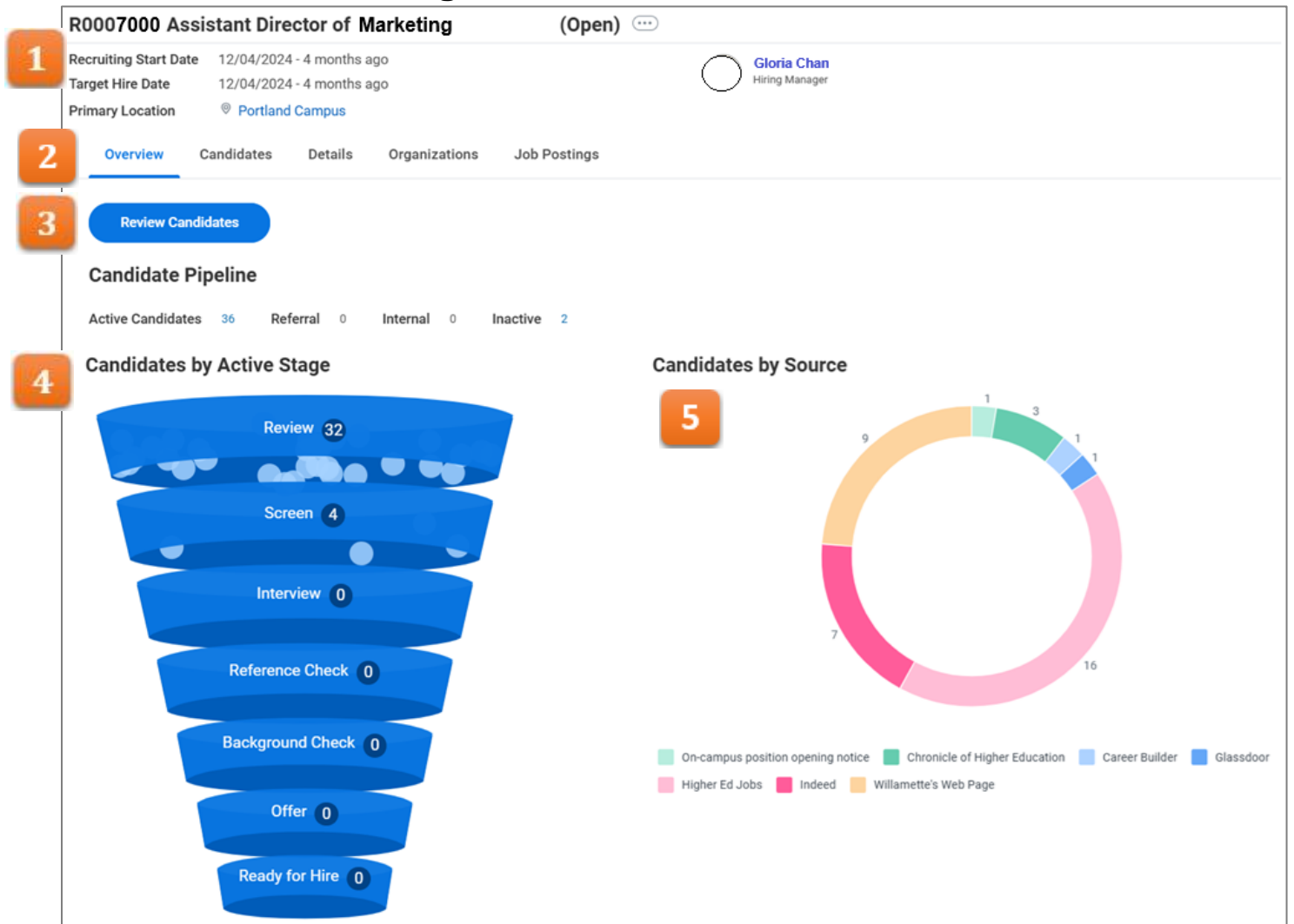|	
1.	From the Workday home page, click the **Menu** button in the top left-hand corner.
2.	From the resulting menu, click **Recruiting**.
3.	The menu shown here displays. Button functionality: • **My Candidates:** Produces a list of all candidates that have applied to all positions. • **Create Prospect:** Not used. • **My Open Job Requisitions:** Displays all open job requisitions. • **My Recruiting Jobs:** Active and past requisitions displayed. • **Job Requisition:** Allows the user to seek and find current and past requisitions. • **Referrals:** Not used. The display under the **Recent** heading shows the most recent active requisitions and will likely be the buttons you will use the most.

Overview Screen Navigation

1.	**Requisition Summary Information.** Lists the requisition number, the start date, targeted hire date, position location, and hiring manager.
2.	**Requisition Tabs.** The Candidates tab the applicants who have applied to the job. More detailed information about the requisition is included in the Details tab. The Organizations tab displays information regarding where the position fits within the overall structure of the university. The Job Postings tab shows the internal and external posting location of the job.
3.	**Review Candidates Button.** Goes to a list of the applicants with their application materials. From this screen candidates can be moved forward in the process or declined.
4.	**Candidates by Active Stage**. Displays how many candidates are in each stage of the application pipeline with the ability to click on a stage and take action on the applicants within it.

| 5. | **Candidate by Source.** This display shows the proportionality of job board sources candidates have come from. |

Key to Candidate Pipeline Stages

Candidates by Active Stage

Review 32
Screen 4
Interview 0
Reference Check 0
Background Check 0
Offer 0
Ready for Hire 0

- **Review:** Application entry point for manager review.
- **Screen:** The first interview, typically conducted by phone.
- **Interview:** All subsequent interviews, including both video conferencing and in person meetings.
- **Reference Check:** Final candidate(s) are moved to this stage when references are being checked.
- **Background Check:** When the final candidate to be hired is moved to this stage, it will prompt HR to send the background check to them.
- **Offer:** HR moves the candidate here once the background check is completed and cleared to generate the offer letter.
- **Ready for Hire:** Candidate is moved to this final stage when the offer letter has been fully signed.

Accessing Candidate Information

1. To review and disposition all candidates regardless of stage in the pipeline they reside in, click the **Review Candidates** button.

   Review Candidates

2.

   Review Candidates   R0006138 Assistant Director of Marketing   (Open)   ⋯

Active Candidates	Active Referrals	Active Internal Candidates	Converted Prospects
36 of 38	0 of 0	0 of 0	0 of 0

   (All Active Candidates)   (Awaiting Action)   (Inactive Candidates)

32	4	—	—	—	—	—
Review	Screen	Interview	Reference Check	Background Check	Offer	Ready for Hire

   No Filters Applied   Saved Filters [select one ▼]

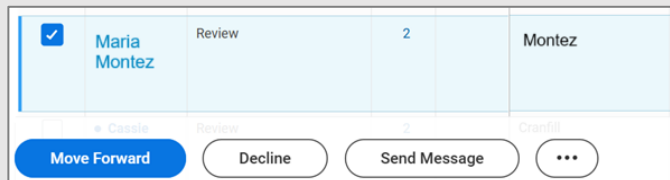   36 items   Overview   Contact   Questions   Experience   Resume

	Job Application	Step / Disposition	Awaiting Action	Candidate Home Acct URL	Candidate Last Name	Date Applied	Current Title	Current Company	Resume	Source	Jobs Applied to
☐	Anna Taylor	Review	2		Taylor	03/18/2025	Marketing Manager	University of Oregon	📄 '25 Taylor resume 📄 WU Taylor Cover Letter	Job Boards -> Indeed	1
☐	James Monroe	Review	2		Monroe	03/14/2025	Social Media Manager	Nike	📄 Monroe Cover PDF 📄 Monroe Resume	Job Boards -> Higher Ed Jobs	1
☐	Maria Montez	Review	2		Montez	03/09/2025	Director of Marketing	Nonprofit Enterprises	📄 MM Professional Resume 📄 MM Cover Letter	Job Boards -> Indeed	1

   The review candidates page displays all active applicants who have applied to the position, including their downloadable application documents. Clicking the **Awaiting Action** button will display all the candidates who have been advanced in the pipeline from the review stage. The **Inactive Candidates** button will lead you to a list of the applicants who have been declined to move forward in the process or withdrew their candicacy.

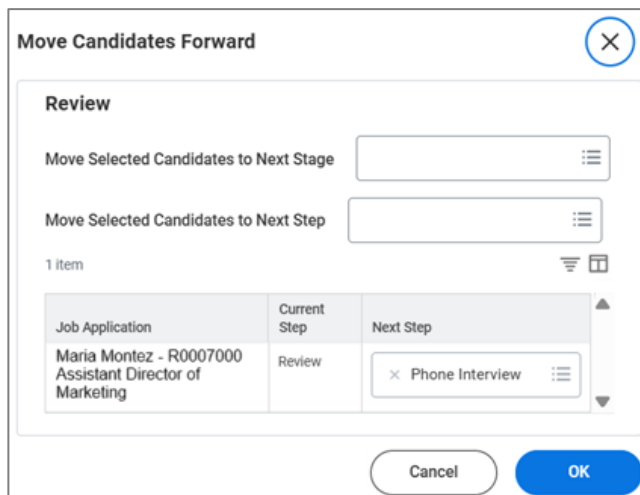## Moving Candidates from the Review to Screening Stage

1. To move a candidate from the Review stage to the Screening stage, click in the check box to the left of the candidate's name, then click the **Move Forward** button at the bottom of the page.	

2. A pop-up screen will appear displaying the candidate name and requisition title, along with the default next step, "Phone Interview." Click **OK** to move the candidate to the next stage. Candidates must be moved one stage at a time. Note that you do not need to fill in the Move Selected Candidate to Next Stage/Step fields to progress.	

Moving Candidates to the Campus/Video Interview Stage
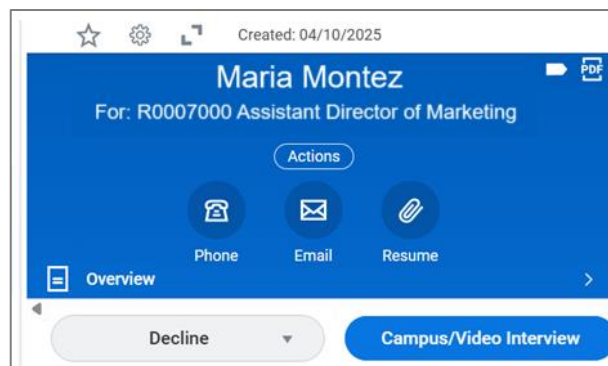
1. A task will be created in Workday. Click on the task to move the candidate forward to the next stage.	

2. Click **Campus/Video Interview** in the task window.	

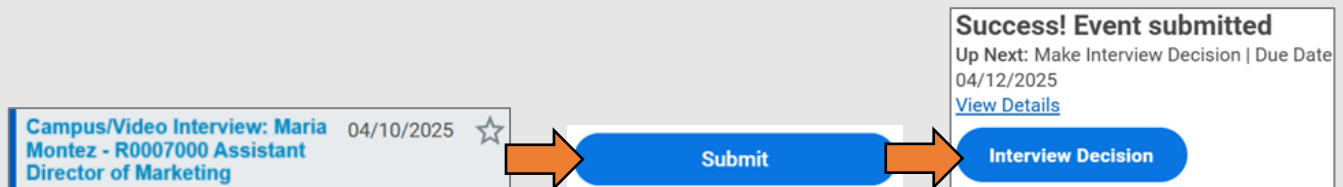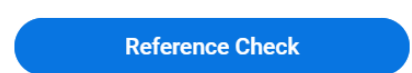|	
3. You will receive a confirmation message containing an **Interview Team** button. Clicking the button will lead you to a screen to enter the members who will interview the candidate. This task is optional, so you can close the Window to move on if desired. A task will be created to interview the candidate. You will keep the candidate in this stage for all additional interviews being conducted.	

Moving Finalist to the Reference Check Stage

1. Once the interviews are completed and you have selected a finalist to fill the position, click on the task and click **Submit**.

A confirmation will appear. Click the **Interview Decision** button in the confirmation message.
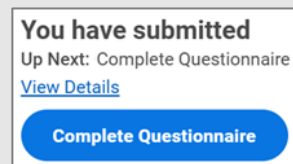
Campus/Video Interview: Maria Montez - R0007000 Assistant Director of Marketing 04/10/2025 ☆

Submit

Success! Event submitted
Up Next: Make Interview Decision | Due Date 04/12/2025
View Details

Interview Decision

2. A summary of the candidate will appear. Click the **Reference Check** button to move the finalist to the reference check stage.
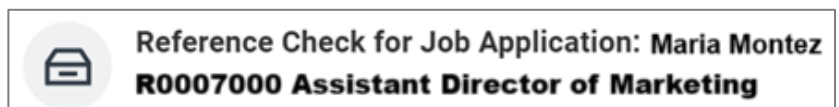
Reference Check

3. A confirmation will display. Unless you have already conducted reference checks for the finalist, close the window.

You have submitted
Up Next: Complete Questionnaire
View Details

Complete Questionnaire

4. Once the reference checks have been completed, click on the **Reference Check** task.
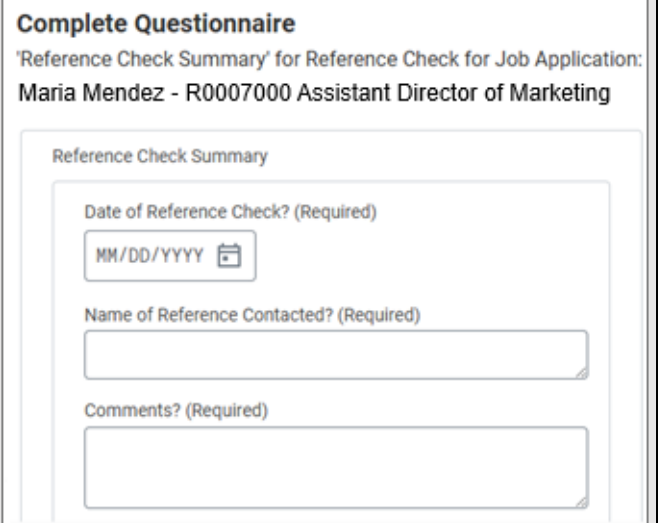
🗄 **Reference Check for Job Application: Maria Montez R0007000 Assistant Director of Marketing**

5. You will be led to the Complete Questionnaire form prompting you to enter the date the reference check took place, the name of the reference contacted, and comments based on what the reference described to you.

You are required to conduct two references checks with the option to add a third as desired.

Upon completion, click **Submit**.

Complete Questionnaire
'Reference Check Summary' for Reference Check for Job Application: Maria Mendez - R0007000 Assistant Director of Marketing

Reference Check Summary

Date of Reference Check? (Required)
MM/DD/YYYY 📅

Name of Reference Contacted? (Required)

Comments? (Required)

Moving Finalist to the Background Check

1.	After submission of the reference check, you will receive a confirmation containing a Review button. If the feedback from the references was positive and you are ready to move forward to hiring the finalist, click **Review**.
2.	You will be led to a candidate summary screen. Click the **Background Check** button to continue. You will receive a confirmation that the background check has been submitted and that Human Resources will be sent a task to launch the background check.

For directions on how to take the finalist from this point to the final offer stage, reference the *Hire a Faculty or Staff position* *job aid.*

Declining Candidates

Notifying candidates that they are no longer being considered for the position should occur immediately upon determining they are not a fit for the role. Letting candidates linger in a stage, particularly after they have spent time interviewing, damages the reputation of the University and should not occur.

When a candidate is declined, they receive an automatic email generated from Workday. There is an option to suppress this message in the Campus/ Video Interview stage so that you can contact the candidate by phone to inform them.

Decline from the Review Candidates Page

1.	Go to the requisition and click the Review Candidates button.
2.	Locate the candidate you wish to decline and check the box next to their name.
3.	Click Decline at the bottom of the list of names.
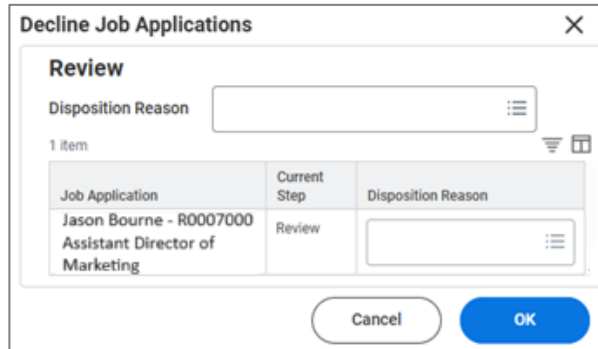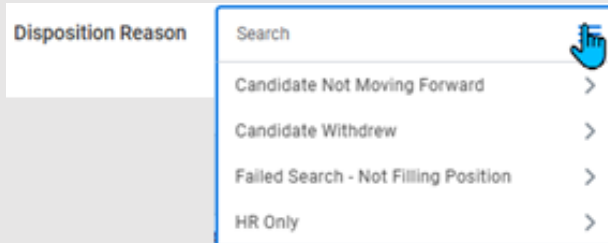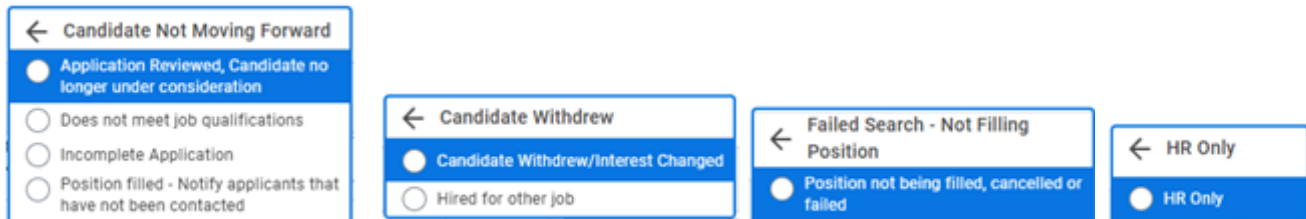
4.	You will be presented with a form to complete.

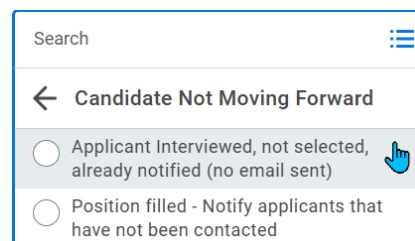|	
5.	Click in the Disposition Reason field and you will be presented with a list of decline categories to choose from. When clicking on one of the categories, sub-categories will appear. Select the sub-category that best matches the reason for the decline.

6.	When clicking on one of the categories, sub-categories will appear. Select the sub-category that best matches the reason for the decline. Categories and sub-categories for declining a candidate in the Review stage are shown below.

(Note that you should not utilize the HR Only option.)

7.	The same process will be followed for declining candidates in other stages. The decline reasons will vary somewhat depending on the stage the candidate is in when being declined.

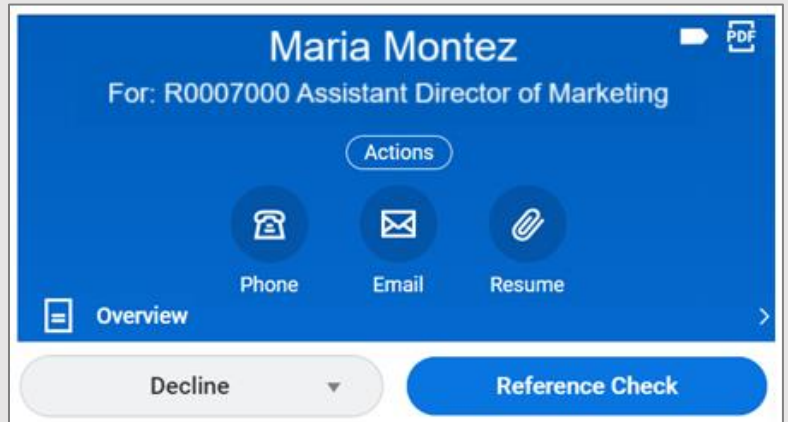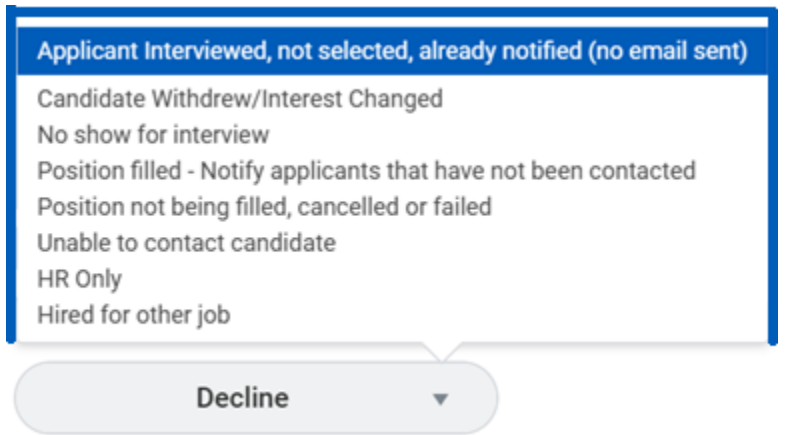|	
8.	When declining an applicant in the Campus/Video Interview stage, there is an option to decline the candidate without having an automatic decline email sent to them. This option allows you to contact the candidate personally to let them know they are not being considered any further, which is the appropriate way to manage candidates who have progressed further in the interview process.	 To use this option, click the **Candidate Not Moving Forward** category, followed by the *Applicant interviewed, not selected, already notified (no email sent)* option.

Decline from the Workday Task Pane

1. Candidates can also be declined from a task once they have been moved from the Review to Screen stage forward. Click on the task and click on the Decline button.	
2. Select the decline reason from the list that generates. The candidate will be declined after the reason is selected.	