Complete All-in-One User Guide

Click the link for a guide to go directly to that User Guide.

Cross-Module

- Create and Maintain Questionnaires

Learning

- Browse and Enroll in a Course
- Create a Course
- Create a Lesson
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Talent

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- Setting Up Self-Schedule Calendars
- Supplemental Questionnaires

Create and Maintain Questionnaires

The objective of this document is to provide basic steps for questionnaire creation and maintenance.

Security Role

- Case Management Administrator
- HR Administrator
- Knowledge Base Content Administrator
- Learning Administrator
- Questionnaire Administrator
- Recruiting Administrator
- State Recruiting

Contents

Create New Questionnaire

1. Search for and select the **Create Questionnaire**.
2. Select **Create New Questionnaire**.
3. Enter name of new questionnaire. Follow recommended naming guidelines.
4. Click **OK**.
5. Select the **Edit Questionnaire Details** button.
6. Set a Questionnaire Display Name, if different than Questionnaire Name.
7. Indicate the **Type(s)** of questionnaire. This controls where the questionnaire is available for selection.
8. Complete the **Allowed on Business Processes** section. This controls where the questionnaire is available for selection.
9. Enter **Questionnaire Instructions** to be provided to the user when receiving the questionnaire.
10. Click **OK**.
11. Select the **Maintain Questions** button.
12. Choose **+** to insert a question.
13. Use **Order** arrows to move question order.
14. Select an existing question or choose to **Create Question**. (See Create Question section)
15. Click **Required** checkbox, if appropriate.
16. Repeat steps 12 -15 until all questions are entered.
17. Click **OK**.
18. Expand the questionnaire in the display on left hand side of screen. Use the **>** to expand each question for review.

19. Select the **Preview Questionnaire** button to preview what the actual questionnaire will look and behave like.

Copy Existing Questionnaire

20. Search for and select the **Create Questionnaire**.
21. Select **Copy Existing Questionnaire**.
22. Use prompt to locate the name of questionnaire to be copied.
23. Enter name of new questionnaire. Follow recommended naming guidelines.
24. Click **OK**.
25. Select the **Edit Questionnaire Details** button.
26. Set a Questionnaire Display Name, if different than Questionnaire Name.
27. Indicate the **Type(s)** of questionnaire. This controls where the questionnaire is available for selection.
28. Complete the **Allowed on Business Processes** section. This controls where the questionnaire is available for selection.
29. Enter **Questionnaire Instructions** to be provided to the user when receiving the questionnaire.
30. Click **OK**.
31. Select the **Maintain Questions** button.
32. Choose **+** to insert a question.
33. Use **Order** arrows to move question order.
34. Select an existing question or choose to **Create Question**. (See Create Question section)
35. Click **Required** checkbox, if appropriate.
36. Repeat steps 12 -15 until all questions are entered.
37. Click **OK**.
38. Expand the questionnaire in the display on left hand side of screen. Use the **>** to expand each question for review.
39. Select the **Preview Questionnaire** button to preview what the actual questionnaire will look and behave like.

Edit Questionnaire

40. Search for and select the **Create Questionnaire**.
41. Select **Edit Existing Questionnaire**.
42. Use prompt to locate the name of questionnaire to be edited. Only those NOT in use are available to edit.
43. Click **OK**.
44. Select the **Edit Questionnaire Details** button.
45. Set a Questionnaire Display Name, if different than Questionnaire Name.
46. Indicate the **Type(s)** of questionnaire. This controls where the questionnaire is available for selection.
47. Complete the **Allowed on Business Processes** section. This controls where the questionnaire is available for selection.
48. Enter **Questionnaire Instructions** to be provided to the user when receiving the questionnaire.
49. Click **OK**.
50. Select the **Maintain Questions** button.
51. Choose **+** to insert a question.
52. Use **Order** arrows to move question order.
53. Select an existing question or choose to **Create Question**. (See Create Question section)
54. Click **Required** checkbox, if appropriate.
55. Repeat steps 12 -15 until all questions are entered.
56. Click **OK**.

57. Expand the questionnaire in the display on left hand side of screen. Use the **>** to expand each question for review.
58. Select the **Preview Questionnaire** button to preview what the actual questionnaire will look and behave like.

Delete Questionnaire

59. Search for and select the **Delete Questionnaire** report.
60. Use prompt to select Questionnaire to delete. Only questionnaires that have NOT been used are available to delete.
61. Click **OK**.
62. Select the **Delete Questionnaire** button.
63. Click **OK**.

Create New Question

64. Use **Find Questions** search to determine if the question already exists.
65. **Create Question** task can be accessed in the Create Questionnaire task or as a stand-alone task by using Search.
66. Enter a **Question Name**. This should be a short but descriptive indicator of question content.
67. Enter the **Question Body**. This is the actual question that will be presented to the user.
68. Select a **Question Type**. Once selected, this cannot be changed.
    a. Date.
    b. Multiple Choice – Multi Select (Between 2 and 25 responses).
    c. Multiple Choice – Single Select (Between 2 and 25 responses).
        a. Use this option if you will have multiple branching questions.
    d. Number.
    e. Text.
    f. Upload Attachments.
69. Select **Question Tags** to help future grouping and searching.
70. If you selected either Multiple Choice option, use **+** to insert a row for each **Possible Answer**.
71. If this question will be scored, enter the **Score** for each response.
72. Click **OK**.

Create and Maintain Question Tags

73. Search for **Maintain Question Tags.**
74. Use **+** to insert row for new tag values.
75. If a tag has not been used, use – to remove the tag value.
76. Update description of tag, if needed. The updated tag name will be attached to any existing usages.

Maintain Questionnaire

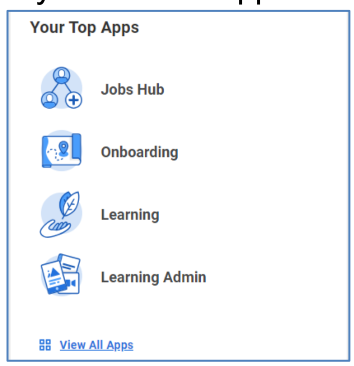
77. Search for and select the **Maintain Questionnaires** task.
78. Select the **Questionnaire Types** that are appliable for the questionnaire.
79. Select the **Allowed on Business Processes** that are applicable.
80. View the **Usage** field to understand if the questionnaire has been used and how many times.
81. Check the **Inactive** checkbox to remove this questionnaire from future usage.
82. Click **OK**.

Browse and Enroll in a Course
The objective of this guide is to Browse and Enroll in a Course for a Teammate.

Security Role
- Recruiter

Contents

Browse Learning
1. From the Workday home page or from you View All Apps area, click on Learning.



2. Click Discover and then lick on the Browse Learning button under the Explore Learning Catalog section.
3. Using a variety of search features you can easily locate a course. Some of the common ways to search for a course are by using the Search bar, Topic, and Type. If you know a portion of the name of the course you can type those words in the Search bar. You can also use the extensive list of filters to locate a course.
4. To enroll in a course, locate and click on the course from your search criteria.
5. Once you have selected the course, click **Enroll** to request attendance in this course.
6. If multiple offerings exist for the course, pick the class that fits your schedule. Select the box in front of that course and select **OK**.
7. On the Review window, you can view course information (type of course, date and time of course, instructor, and location).
8. Select **Submit** to finalize your request to be signed up for the course.
9. You will now receive a confirmation notification indicating the course has been submitted.
10. Click **Done** to close your window.
11. You will be taken back to the course description screen.
12. Click the **Workday icon** to return to the home page.

Acceptance Criteria
1. Verify that you have been enrolled in a course on your learning homepage.

Create a Course

The objective of this guide is to create a Course in the Learning Application.

Security Role

- Learning Administrator

Contents

Create a Course

1. Beginning on the homepage, select View All Apps → Learning Admin.
2. Under the Create menu, select Course → Create Digital Course → OK.
3. Complete the Course Details. Consider the below information when completing course details:
    a. Course Title: Input course title using the recommended naming conventions.
    b. Description: Input a description of the course. It is recommended to include the learning objectives as well.
    c. Topics: Select the topic(s) under which the course will be located. Select the potential groups to restrict visibility and course offerings to learners within that group.
    d. Status: It will auto-populate to Open.
    e. Requires Enrollment: The checkbox will automatically be selected.
    f. Exclude from Recommendations: Workday populates these content container worklets on the Learning Dashboard with recommendations for relevant learning content such as: Based on Interests, Most Popular, Popular in Your Role, Recently Added, Recommended for You. Select this option to Exclude from Recommendations.
    g. Exclude from Search and Browse: Select this option to exclude the course from appearing in the Browse Learning Content report and global search results. If this option is selected, learners will not be to find the course content.
    h. Inactive: Select the checkbox to make the course inactive and no longer visible for learners.
    i. Contacts: Type and select the person's name you want to learners to contact for further course details or questions.
    j. Time Value: Enter the amount of time (minutes, hours, days, weeks) the learners need to complete all course lessons, including any instructor-led and digital content.
4. Complete Expiration Rules (if applicable) by specifying an Expiry Period that applies to enrollments for the course. You can create expiration rules that define learner group rule conditions and expiry periods for each group.
    a. Workday automatically adjusts the expiry period of the course for learners who meet the conditions of a learner group rule.
    b. The expiration date or duration setting is the default expiry period of the course for learners who don't meet the learner group rule conditions for any expiration rule.
5. To add training units to the course, select the plus sign (+) under Units.
6. To assign competencies to the course, select the plus sign (+) under Competencies.
7. Complete the Lesson Details. You can add multiple instructor-led and training activity lessons to blended courses.
    a. Allowed Instructors: Select the instructors of the course.
    b. Allowed Assessors: Permits assessors to the training activity lesson in the course, if applicable.
    c. Location: Select the location where the classroom training for offerings will be held. You

can leave blank for Instructor Led/Webinar.

8. Select Add Lesson and choose a lesson type based on course content. You may add as many lessons needed for the course.
    a. External Content: The course content is housed and needs to be accessed from an external site. You are required to input a Lesson Title and Content URL for the learner to access the content.
    b. Media: The course content includes a video, packaged content such as SCORM (eLearning course exported from Articulate Rise, Articulate Storyline or Adobe Captivate), or documents such as participant guides, worksheets, copy of slide decks, etc. For Media lessons, you can select Provide Course Grade.
    c. Survey: You can select a survey you have created in Workday.
9. Select Submit.

Acceptance Criteria

10. Verify that you have successfully enrolled the employees in a course on using that same report.

Create a Lesson

The objective of this guide is to create a lesson in the Learning Application.

Security Role

- Learning Administrator

Contents

Create Lesson

1. Beginning on the homepage, select View All Apps → Learning Admin.
2. Under the Create menu, select Lesson.
3. Complete the Lesson Details.
   a. Title: Input the course title using the recommended naming conventions.
   b. Topics: Select the topic(s) under which the course will be located. Select the name of the agency to restrict visibility and course offerings to learners within that specific agency.
   c. Description: Input a description of the lesson. It is recommended to include a summary and the learning objectives of the lesson.
   d. Exclude from Recommendations: Workday populates these content container worklets on the Learning Dashboard with recommendations for relevant learning content such as: Based on Interests, Most Popular, Popular in Your Role, Recently Added, Recommended for You. Select this option to Exclude from Recommendations.
   e. Exclude from Search and Browse: Select this option to exclude the course from appearing in the Browse Learning Content report and global search results. If this option is selected, learners will not be to find the course content.
7. Drop or select file(s) in Media section from Your Computer or Drive.
8. Next, drop or select the file you want for the cover image in the Cover Image section.
9. Select Submit.

Acceptance Criteria

10. Verify that lesson has been created in the learning course.

Create a Program
The objective of this guide is to create a Program in the Learning Application.

Security Role
- Learning Administrator

Contents

Create Program
1. Beginning on the homepage, select View All Apps → Learning Admin.
2. Under the Create menu, select Program.
3. Complete the Program Details.
    a. Program Title: Input Program title using the recommended naming conventions.
    b. Program Description: Input a description of the Program. It is recommended to include the learning objectives as well.
    c. Topics: Select the topic(s) under which the Program will be located. Select the potential groups to restrict visibility and course offerings to learners within that group.
    d. Status: It will auto-populate to Open.
    e. Requires Enrollment: The checkbox will automatically be selected.
    f. Exclude from Recommendations: Workday populates these content container worklets on the Learning Dashboard with recommendations for relevant learning content such as: Based on Interests, Most Popular, Popular in Your Role, Recently Added, Recommended for You. Select this option to Exclude from Recommendations.
    g. Exclude from Search and Browse: Select this option to exclude the course from appearing in the Browse Learning Content report and global search results. If this option is selected, learners will not be to find the course content.
    h. Inactive: Select the checkbox to make the course inactive and no longer visible for learners.
    i. Version: Enter an alphanumeric version label, if desired. (Optional)
    j. Version Notes: Enter rich text notes about the version, if desired. (Optional)
    k. Effective Date: The system will auto-populate to the creation date. To postpone availability for scheduling course offerings, you can specify a date in the future. Note: A course version is effective until you add a new version. Adding a new version for a course will replace the current version. The current version expires unless its Effective Date is in the future. In that case, it remains available for editing for potential future enhancements to the course.
    l. Time Value: Enter the amount of time (minutes, hours, days, weeks) the learners need to complete all lessons in the course, including any instructor-led lessons and digital content.
    m. Contacts: Type and select the person’s name you want to learners to contact for further program details or questions.
4. To assign competencies to the program, select the plus sign (+) under Competencies.

5. Complete Expiration Rules (if applicable) by specifying an Expiry Period that applies to enrollments for the course. You can create expiration rules that define learner group rule conditions and expiry periods, on these grids: Advanced Learning Expiration Rules, Advanced Learning Expiration Rules for Extended Enterprise Learners.
    a. Access the Create Learner Group Rule task from the Learner Group Rule prompt to define condition rules or select an existing rule. For extended enterprise learners, use the Create Extended Enterprise Learner Group rule task.
    b. Workday automatically adjusts the expiry period of the course for learners who meet the rule conditions of a learner group rule.
    c. The expiration date or duration setting is the default expiry period of the course for learners who don't meet the learner group rule conditions for any expiration rule.
6. Select Add Content and choose a course type based on the program content. You may add a Blended Course, Digital Course, and/or Lesson. When you select any course type, the Content field is where you will search and select the courses or lessons you would like to include in the program.
7. Select Submit.

Acceptance Criteria

8. Verify that program has been created in the learning catalog.

Mass Enroll in a Course

The objective of this guide is to Mass Enroll Teammates in a Course.

Security Role

- Course Facilitator
- Learning Administrator

Please note: The following can be done as a Mass Enrollment as a Learning Administrator or as the facilitator to a specific course.

Contents

Enroll a Learner

1. Using the search bar at the top of the screen begin typing, Find Workers to Enroll – Learning Admin Mass Enroll until the report populates on the screen.
    b. Select the Find Workers to Enroll – Learning Admin Mass Enroll Report.
2. Within the report, you can search for learners using:
    a. Search Bar (Name Only)
    b. Current Search Filters.
3. Utilize the current search Filters on the left side of the screen to find your learners in bulk based on specific factors (e.g., Cost Center, Job Family, Location, etc.)
4. When searching by name you can only enroll one user at a time. If the search results yield users with the same name, there are ways to differentiate using the following:
    a. Job Title
    c. Email address
    d. Cost Center
    e. Manager Name
5. Once learner(s) to enroll have been narrowed down, select the checkbox next to the name(s).
6. Select Learning Mass Enroll.
7. A prompt will pop up to select the Learning Content. The Learning Content search field should be populated with the course title. (Caveat: This field only allows one course title)
    a. Begin typing the course title or keywords in the search bar and select enter.
    b. The associated course title(s) will populate.
    b. Select the course then select OK.
8. On the review screen you have the option to assign the lesson as required learning.
    a. Assign as Required Learning: Select Yes or No.
    b. When selecting Yes, the option to apply a due date will appear.

Acceptance Criteria

9. Verify that you have successfully enrolled the employees in a course on using that same report.

Navigate Learning Dashboard
The objective of this guide is to Navigate the Learning Dashboard for a Trainer.

Security Role
- Learning Administrator
- Learning Instructor

Learning Instructors will use the Learning Trainer application to access commonly used daily tasks, such as viewing upcoming courses and course details, viewing rosters, and managing grades and attendance.

Contents

View Upcoming Courses
There are two ways to view the upcoming course offerings you have been assigned to:

My Course Offerings
1. Navigate to the Learning Trainer application from Global Navigation.
2. Review the offerings assigned to you on the left under My Course Offerings on your dashboard.
   a. Click View More to get a complete list of your course offerings as well as the start dates, end dates, and locations.

Instructor Schedule Calendar
3. Additionally, you can select My Schedule under the Menu on the right-hand side of your dashboard.
4. This will bring you to the Instructor Schedule Calendar.

Review Course Details
5. Navigate to the Learning Trainer application from Global Navigation.
6. Under My Course Offerings, select a Course Offering to review in the Course Offering column.
7. Review the Course Details at the top of the screen and within the tabs below:
   a. **Lessons**: Displays all lessons and content within the course
   b. **Advanced Details**: Includes the course delivery mode and capacity details
   c. **Enrollments**: Lists the learners enrolled in the course and their status
   d. **Grading and Attendance**: Review attendance and grading for learners enrolled in the offering
8. Click the Related Actions button (…) at the bottom of the screen to do the following:
   a. **Manage Roster**: Enter attendance, scores, and overall grade (see below)
   b. **View Waitlist**: Review names on the waitlist.
   c. **Add to Calendar**: Downloads the course content to an Outlook ".ics" file you can add to your calendar.

    d. **View as a Learner**: View the course details in Learner view.

View Rosters

1. Navigate to the Learning Trainer application from Global Navigation.
2. Under My Course Offerings, select a Course Offering from the **Course Offering column**.
3. Select the Enrollments tab.

Print Rosters

1. Click the Export to Excel icon in the top right corner of the table.
2. Click the Download in the pop-up window.
3. Once the document downloads, depending on your browser defaults, you'll be able to open the file:
    a. *In the top right corner of your screen.*
    b. *Bottom left corner of your screen.*
    c. *Or in your downloads folder.*
4. Edit the Excel file to meet your needs.

Manage Grades and Attendance

Primary Instructors of an offering can mark the Overall Grade and Attendance for learners.

1. Navigate to the Learning Trainer application from Global Navigation.
2. Under My Course Offerings, select a Course Offering to review in the **Course Offering column**.
3. Select the Enrollments tab.
4. Click the Related Actions button (…) at the bottom of the screen.
5. Select Manage Roster.
6. To enable editing in the Overall Grade chart, *you must first select a learner or multiple learners*.
    a. Select the checkbox next to the name(s) of the learner(s) you'd like to mark.
    b. Select all learners at once by checking the box at the top of the column.
7. Mark the following:
    a. Overall Attendance: Select *Attended, Partially Attended, Did Not Attend* from the drop-down.
    b. Overall Score (if applicable): Enter a numerical score.
    c. Overall Grade: Select Pass or Fail.
        i. *You can also use the Mark selected rows as Attended and/or Mark selected rows as Passed and check the box in the upper left-hand corner to mark all attendees.*
8. Click OK.
9. Click Done.

View and Drop a Course
The objective of this guide is to View and Drop a Course for a Teammate.

Security Role
- Employee

Contents

Drop a Course
1. From the Workday home page or from you View All Apps area, click on **Learning**.
2. Select **My Learning**.
3. On your My Learning page, select **View My Learning Transcript** in the View Your Learning History section.
    a. This will show your training not started, in progress, and completed.
4. To see details related to an upcoming class click on the class name.
    a. A window providing the date, class time, location, room, address, and instructor name.
5. By clicking **View Course**, you will see a course description and all the lessons contained within the course.
6. On the View Course screen, you can add the course to your Outlook calendar or drop the course and choose an alternate date.
7. You will now receive a confirmation notification indicating the course has been dropped.
8. Click **Done** to close your window.
9. You will be taken back to course description screen.
10. Click on the **Workday icon** to return to the home page.

Acceptance Criteria
11. Verify that you have viewed and dropped a course on your learning homepage.

Add Development Item
The objective of this scenario is to Add Development Item.

Security Role
- Employee

Contents

Add Item
1. From your **Worker Profile**. Select **View Profile** (to get to your Worker Profile in the top right-hand corner, click your photo or the person icon).
2. Down the left side of the page, select **Career**.
3. Across the top of the **Career** page select **Development Items**.
4. Select **Add**.
5. Type in a name for the **Development Item**.
6. Enter in any **Additional Information**, if needed.
7. Use the drop down to select **Relates To**.
8. Select a **Status**.
9. Open **Details** by clicking on the arrow.
10. Select a **Category**.
11. **Start** and **Completion Date**.
12. Any **Status Notes**.
13. Select **Add**.

Edit a Development Item
14. Under **Career**, select **Development Items**.
15. From here, you can **Add** more **Development Items** or you can Edit a **Development Item** by clicking the Pencil Icon .

Acceptance Criteria
16. Verify that you have been successful adding development items and editing .

Anytime Feedback – Provide or Get Feedback

The objective of this guide is to provide Anytime Feedback for an employee or self.

Security Role

- Manager/Employee

Contents

Provide Feedback

1. From the Workday home page in the search bar type **Get Feedback**.
    a. Select **Get Feedback** on **Worker** or **Self**.
        - **Note**: *In this example, we will select* ***Self****.*
2. Using the **drop down** select **Who do you want to request feedback from**.
    - **Note**: *By checking the box, you can* ***Make Feedback Anonymous***.
3. Select how you would like the **Feedback Shared**.
4. Enter in what you would like Feedback on by entering a **Question,** if needed you can Add more than one question by clicking **Add**.
5. Select **Submit**, if ready to send OR **Save for Later**, you are not ready to send.

Get Feedback on Worker

6. Using the seach bar type **Get Feedback**.
7. Select **Worker** you would like to get feedback on.
8. Follow steps 4-6 to complete the actions.

Acceptance Criteria

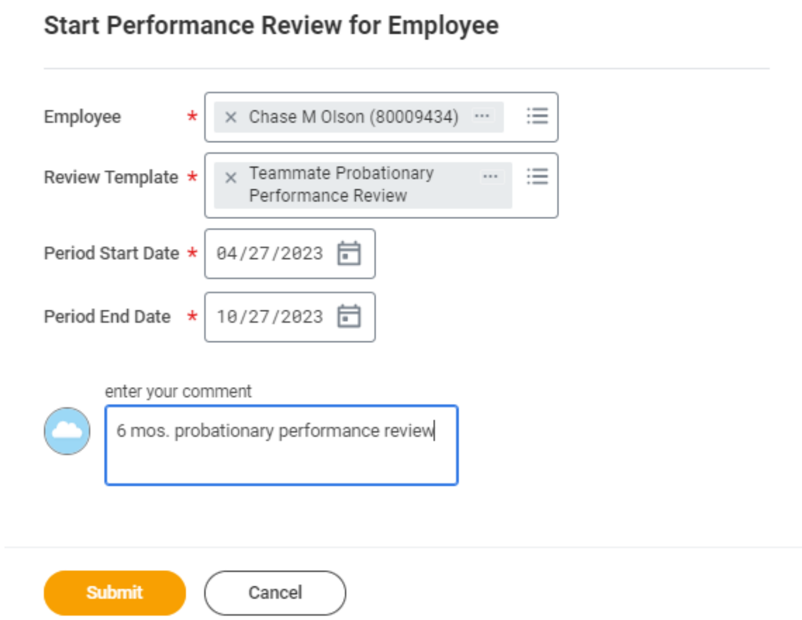
9. Verify that you have been successful in Request **Anytime feedback** on **Self** and if Manager for a **Worker**.

Assign Probationary Performance Review
This covers the steps to initiate and assign a probationary performance review by using the **Start Performance Review for Employee** task.

Security Role
- Manager

Contents

Assign Probationary Performance Review
1. From the **Search bar**, type **Start Performance Review for Employee.**
2. Using the **Employee** field search for the name of the individual the review is for.
3. With the name displayed in the Employee field, identify the appropriate review template to be assigned: Using the **Review Template > By Type** > **Probationary Reviews >** select the appropriate review title (*Teammate or People Leader probationary review options*).
4. Enter the date range the individual is to be reviewed over by using the **Period Start Date** and **Period End Date** fields.
5. Type any applicable notes in the **enter your comment** text box. (*Optional*).
6. Click **Submit.**



Acceptance Criteria
7. Upon clicking the Submit button confirm the pop-up message **Start Performance Review Confirmation** appears. The **Up Next** section will display the next review step and who it is assigned to.

Complete an Employee Performance Review

The objective of this guide is to complete an Annual Performance Review in Workday for an employee. A manager performance evaluation is an assessment that a manager conducts to determine how well an employee is fulfilling their duties.

Security Role

- Manager

Contents

Complete a Performance Review

1. From the homepage, click **Menu**.
1. Navigate to the **Manager Evaluation: Annual Performance Review (Employee or Manager)**:
2. Click the **My Tasks** icon in the top right corner.
3. Select **Manager Evaluation: Annual Performance Review (Employee or Manager)**.
4. Click **Get Started**.
5. Acknowledge the employee received a copy of their position description and click **Next**.
6. Review **Annual Performance Objectives** set by your employee.
   - **NOTE:** You can add new objectives for your employee by clicking Add and filling out the required fields.
7. Click **Add** to add a new objective:
   a. Add **Goal**.
   b. Add **Description**.
   c. Select **Due Date**.
   d. Select **Status**.
   e. Select **Weighting**.
   f. Add **Rating**.
   g. Provide a **Comment**, if necessary.
8. Scroll through the **Performance Competencies** (Accountability, Adaptability, Collaboration, Customer Focus, and Problem Solving) and leave a **Rating** and a **Comment** for each competency.
9. Click **Next**.
10. Review the **Professional Development** items. Add items, as needed by filling out the required fields.
   a. Add **Development Item**.
   b. Provide **Additional Information**.
   c. Select a **Status**.
   d. Select a **Start Date**.
   e. Select a **Completion Date**.
11. Click **Next**.
12. Review the **Overall Rating Summary**. Click **Next**.
13. Review the **Summary** page, then click **Submit**.

Acceptance Criteria

14. Verify that the performance review has been submitted in your Inbox Archive.

Create and Assign SMART Goals

The objective is to demonstrate how a People Leader can create and assign a SMART Goal using the **Add Goals for Employee** task.

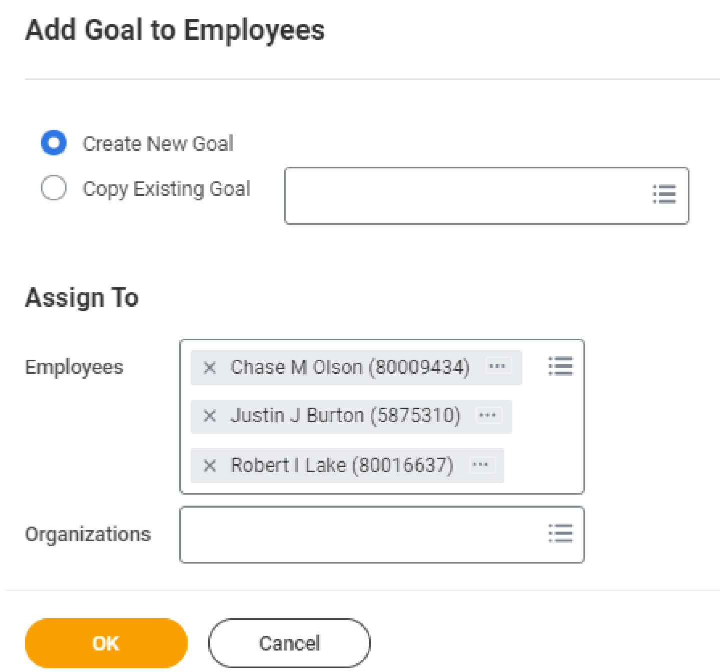
Security Role

- Manager

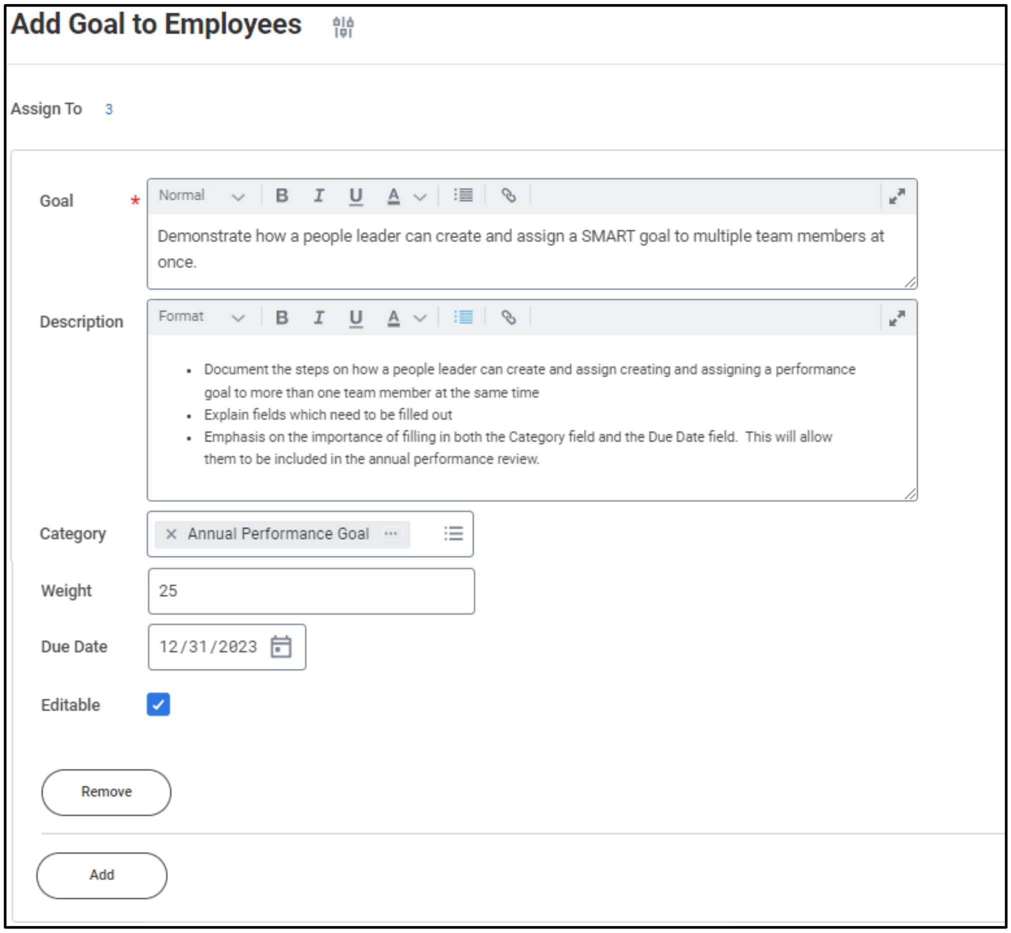
Contents

Create Goals

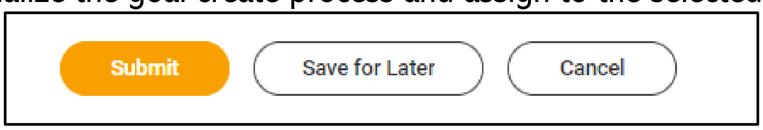
1. From the **Search bar**, type **Add Goal to Employees.**
2. Select **Add Goal Employees** task from the list.
3. Select **Create New Goal**
4. Click in the **Employees** field, Select *My Team*.
5. Fill in the check box for the specific team member(s) to be assigned the goal.
6. Click **OK**.



7. From **Add Goal to Employees**, enter the title in the **Goal** field.
8. Add in **Description**, as needed.
9. Select *Annual Performance Goal* for the **Category** field.
10. Enter the goal weighting percentage in **Weight** field.
11. Enter a **Due Date.**
    - **NOTE**: Both the *Category* and *Due Date* fields must be filled in. This is required so the goal can be included in the performance review.
12. Check **Editable** box.
    - **NOTE:** Clicking Add will allow you to create additional goals to assign to the selected teammate(s).



13. Click **Submit** to finalize the goal create process and assign to the selected teammate(s).



Acceptance Criteria

14. Verify that you have been successful in adding goals for the teammate(s)
15. Click the Menu icon > select My Team > click on one of the teammates to whom you assigned the goal.
16. From their profile, click Performance > confirm goal is displayed on the **Individual Goals** section.

Request Anytime Feedback

The objective of this guide is to Request Anytime Feedback for an employee. As a manager, you can request feedback on any member of your team. Feedback is not automatically incorporated into an employee review but is visible to a manager.

Security Role

- Manager

Contents

Request Anytime Feedback

1. From the homepage, click on the **Menu**.
2. Select the **Team Performance** application.
3. Under Actions, select **Get Feedback on Worker**.
   - **NOTE:** If you do not see the task, click on **More** to reveal more Actions.
   - You can also access this task by typing **Get Feedback on Worker** directly into the search bar at the top of the page.
4. In the **Worker** field, search and select the name of the individual you wish to collect feedback on. Select **OK**.
5. In the **Who do you want to request feedback from** field, search and select the names of the individual(s) who will provide the feedback.
6. If feedback is marked "Anonymous," then others who can read the feedback will not know who submitted it.
7. In regard to the **Feedback Sharing:**
   - If **"Don't share with"** is selected, then that employee will never see the feedback submitted.
   - If **"Share with others"** is marked, other people leaders with access to the Worker profile will see the feedback.

7. Enter **Question(s)** for the feedback provider to answer. Use the free text box to format your question.
8. Select **Add** to include additional questions.
9. Select **Submit** to send the request for feedback.

Acceptance Criteria

10. Verify that the feedback request has been submitted in your Inbox Archive.

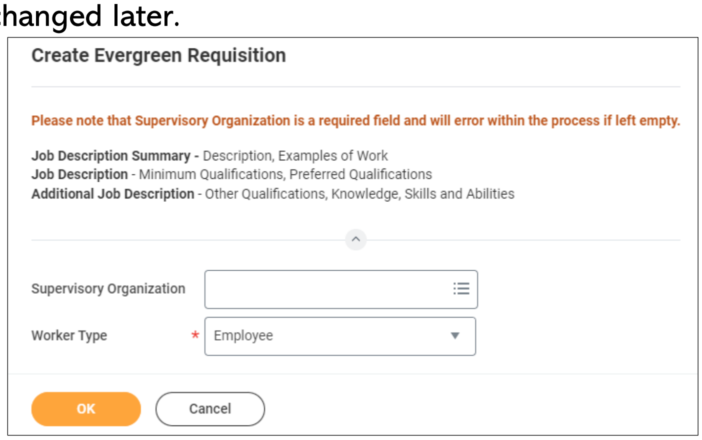
Create Evergreen Requisition
The objective of this guide is to create an evergreen requisition.

Security Role
- Recruiter

Contents

Create Evergreen Requisition

1. Start the process by doing a or b.
   a. From the Recruiting Dashboard, select Create Evergreen Requisition.
   b. In the search bar, type Create Evergreen Requisition and select the task.
2. Add the appropriate supervisory organization. Note, a supervisory organization MUST be added or there will be errors in the process if left empty. The supervisory organizations actually hired into can be different/changed later.



7. Click **OK**.
8. Recruiting information page will display.
9. Select **Recruiting Instructions**.
   a. Post Internal Only (Agency Specific).

   b. Posting Internally Only (Statewide).
   c. Posting Not Required.
      i. Use only for Requisitions linked to an Evergreen Requisition.
   d. Post Internally and Externally.
10. Enter Recruiting Start Date, as well as Target Hire Date and Target End date as applicable.
    a. Recruiting Start Date – when you will start the recruiting process.
       i. You will enter the Posting Start Date and End Date later in this process.
    b. Target Hire Date – not required for evergreens.
    c. Targe End Date – not required.
11. Click Next.

Job

12. Enter **Job Posting Title** – this can be your Working Title and this is what will show in the "advertisement."
13. Enter **Justification** if desired – not required.
14. Enter appropriate **Job Profile**. Note, this must be the job profile that will be hired from this evergreen.
15. Enter the **Job Description Summary**.
    a. Description, Examples of Work.
16. Enter the **Job Description**.
    a. Minimum Qualifications, Preferred Qualifications.
       i. Note, Minimum Qualifications MUST match assigned class specification for classified positions.
17. Enter the **Additional Job Description**.
    a. Other Qualifications, Knowledge, Skills, and Abilities.
18. Select Worker Sub-Type (in most cases, Regular will be selected).
19. Select time Type (Full time or Part time).
20. Select Remote Type if applicable.
21. Select Primary Location.
    a. The Primary Job Posting Location will updated based on the Primary Location selected.
22. Add Additional Locations if applicable.
23. Questionnaires.
    a. Leave both the Internal Posting Questionnaire and the External Posting Questionnaire.
    b. If any additional questionnaires are needed, they need to have been created prior to you starting this process. If that is true, you need to CANCEL this event and start it over.
24. Click **Next**.

Organizations

25. Continuing through the process, click the **Pencil Icon** to edit any of the **Organization Assignments**. These are the Organization Assignments that you have come to know and love. Enter all appropriately.
    a. Enter **Company**.
    b. Enter **Cost Center**.
    c. Continue down the page to complete any other information as needed. The following are required, although not marked with an asterisk.
       i. SBU
       ii. EDC Group

iii. Budget Program Number
iv. Type of Location

26. Click **Next**.

Attachments

27. Add any applicable documentation related to your requisition.
28. Click **Next**.

Review Summary

29. Edit any applicable items on summary screen, if needed.
30. Click Submit, if ready to move forward, or Save for Later.

Goes to State Recruiting for Review. Once approved, it will come back to your Workday Inbox

a. If the event is **Sent Back** to you (in Workday) by a State Recruiter, you will need to fix the issue, as outlined by that Recruiter, and re-submit.

Task to Assign Roles

31. Click on the event.
32. Click Primary Recruiter and assign it to whomever is the Primary Recruiter for this Requisition.
33. Click **Submit**.

Click Open to proceed to the Request Requisition Compensation

34. The Guidelines should populate in.
35. In the Salary section, verify that the Hourly Rate is the Minimum Hire Rate. If necessary, change the amount.
    a. The ONLY two Frequencies we use are Hourly and Annual. We do not use ANY OTHER frequencies.
        i. Hourly Plan – use when the Pay Rate Type is Hourly Exempt or Hourly Non-Exempt and ALWAYS use this for Part time positions.
            (1) Hourly comp amounts always need to have three decimal places!
        ii. Salary Plan – use when the Pay Rate Type is Salary Exempt or Salary Non-Exempt ONLY.
            (1) Delete the Hourly Plan assignment.
            (2) Click the Add button to add in a Salary Plan instead.
            (3) If you are adding a Salary Plan assignment, use an Annual amount and NOT Hourly. This is ONLY to be used based on the Pay Rate Type mentioned above.
            (4) Annual comp amounts always need to have two decimal places!
36. Click **Submit**.

Configure Supplementary Questionnaires for Job Requisition

37. You can add other questionnaires.
    a. However, the questionnaire would have had to have been created prior to this process being started.
38. Click Submit.

Goes to back to State Recruiting for Final Review and Job Posting

a. If the event is **Sent Back** to you (in Workday) by a State Recruiter, you will need to fix the issue, as outlined by that Recruiter, and re-submit.

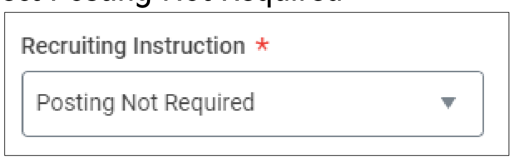
Once Job is posted, you will receive a notification confirming that the evergreen requisition is posted

Link to Evergreen

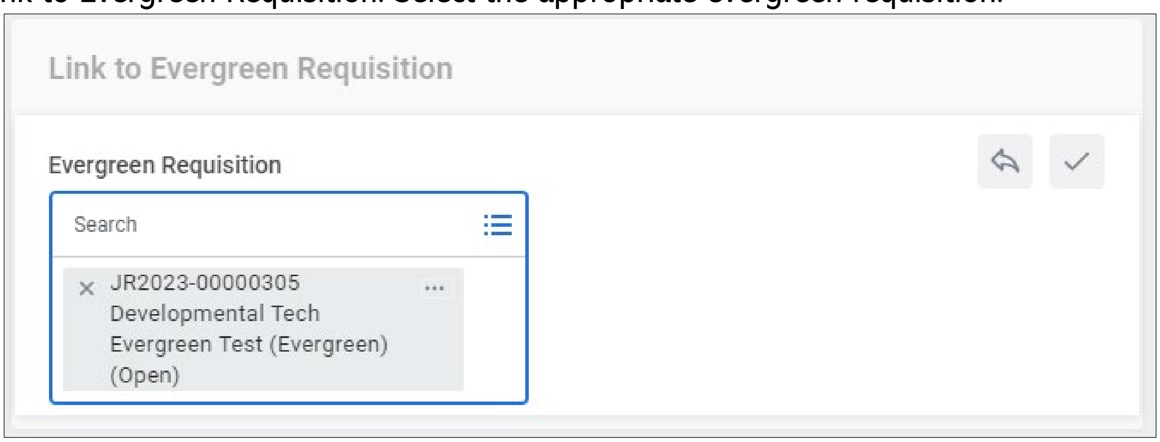
NOTE: You cannot hire an individual on an evergreen requisition. You will need to create a standard requisition (see Create Job Requisition guide) and link it to the evergreen.

When linking to an evergreen, on your standard requisition, ensure the following:

- Recruiting Instruction: Select Posting Not Required



- Link to Evergreen Requisition: Select the appropriate evergreen requisition.



Create Job Requisition

The objective of this guide is to Create Job Requisition.

NOTE: Position must be created and approved prior to requesting a job requisition be opened to fill the position.

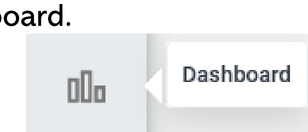
Security Role

- Recruiter

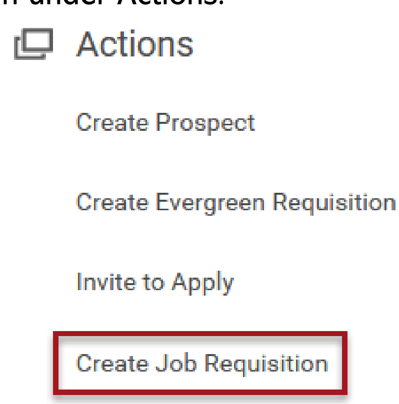
Contents

Create Requisition

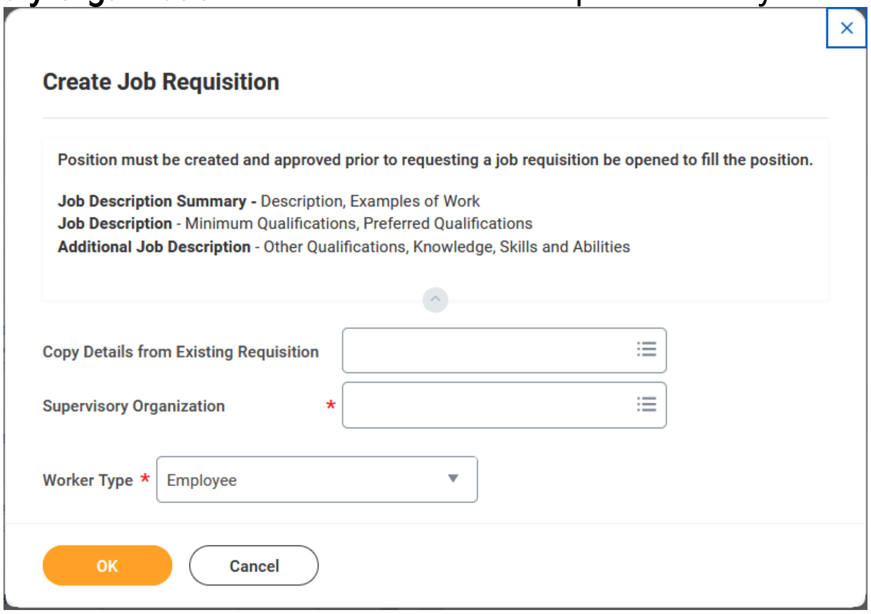
1. Start the process by doing a, b, or c:
    a. Find a vacant position, then from the Related Actions, go to Job Change > Create Job Requisition.
    b. On the Recruiter Hub, click Dashboard.



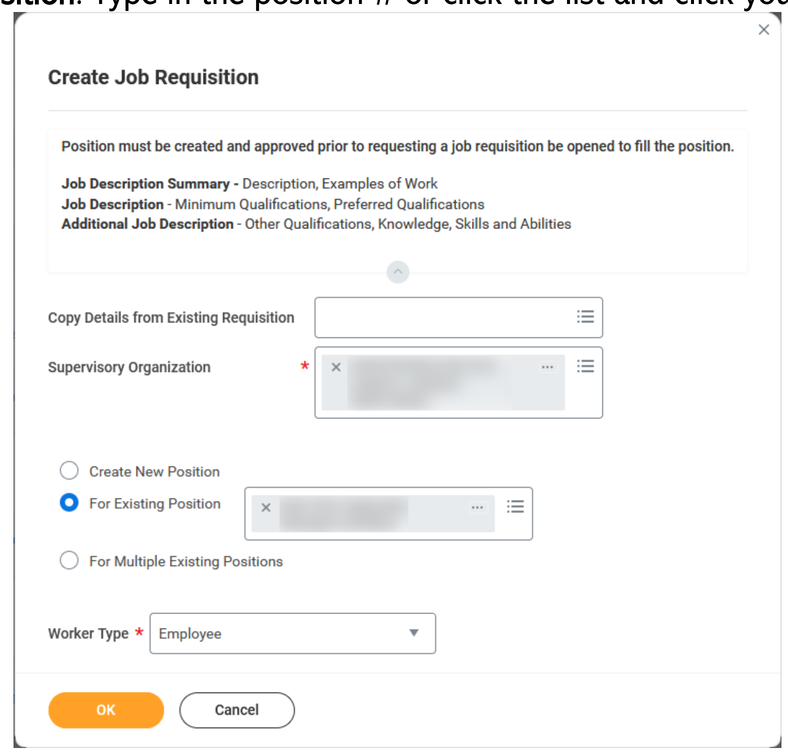
        i. Click Create Job Requisition under Actions.



   c. Type **Create Job Requisition** in the search bar, then click the Task.
2. Copy Details from Existing Requisition by using the drop-down menu, if not continue to Supervisory Organization.
   a. To Copy Details from Existing Requisition, you need to know the Req #.
3. Click the **Supervisory Organization** that contains the vacant position that you want to fill.



4. Click **OK**.
5. Click **For Existing Position**. Type in the position # or click the list and click your desired position.



6. Click **OK**.
7. Recruiting Information page will display.

Recruiting Information

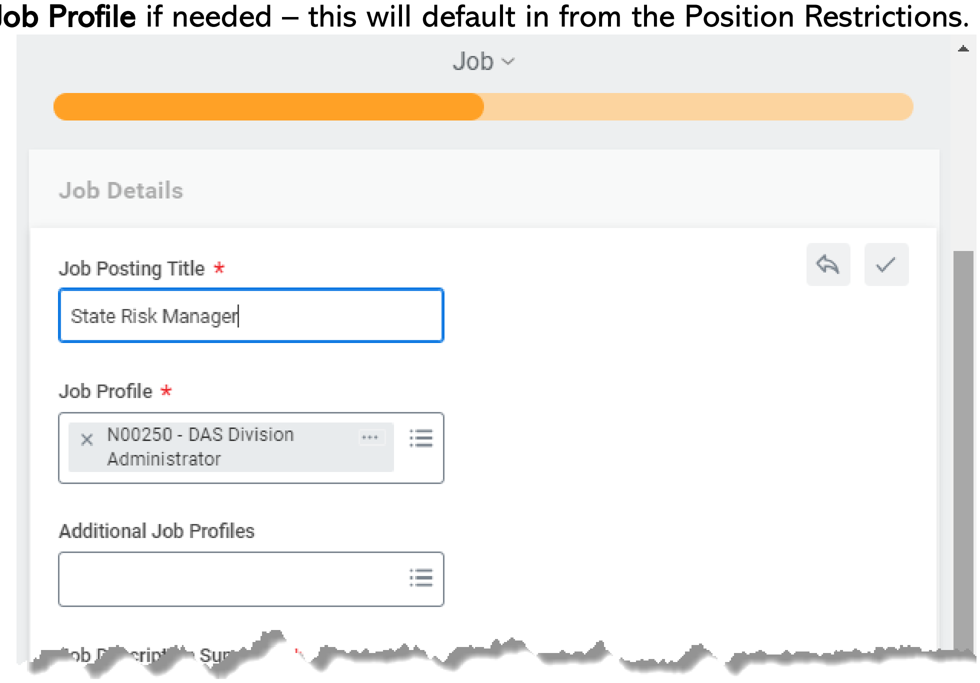
Click the **Pencil Icon** to edit the sections you need to edit.

8. Add a **Reason**.
    a. Click either Replacement position OR Addition.
    b. If this is a **replacement position**, you will need to select the **Worker.**
9. Is this a spotlight job – if yes, check the box. Spotlight a job requisition in Workday means that the job posting will be given more visibility and prominence on the Workday platform.
    a. Use this option sparingly.
10. Click **Recruiting Instructions**.
    a. Post Internal Only (Agency Specific).
    b. Posting Internally Only (Statewide).
    c. Posting Not Required.
        i. Use only for Requisitions linked to an Evergreen Requisition.
    d. Post Internally and Externally.
11. Enter in **Recruiting Start Date**, **Target Hire Date** and if needed **Target End Date**.
    a. Recruiting Start Date – when you will start the recruiting process.
        i. You will enter the Posting Start Date and End Date later in this process.
    b. Target Hire Date – when would you like to have this person begin work?
    c. Target End Date – not required.
12. Click **Next**.

Job

Click the **Pencil Icon** to edit the sections you need to edit.

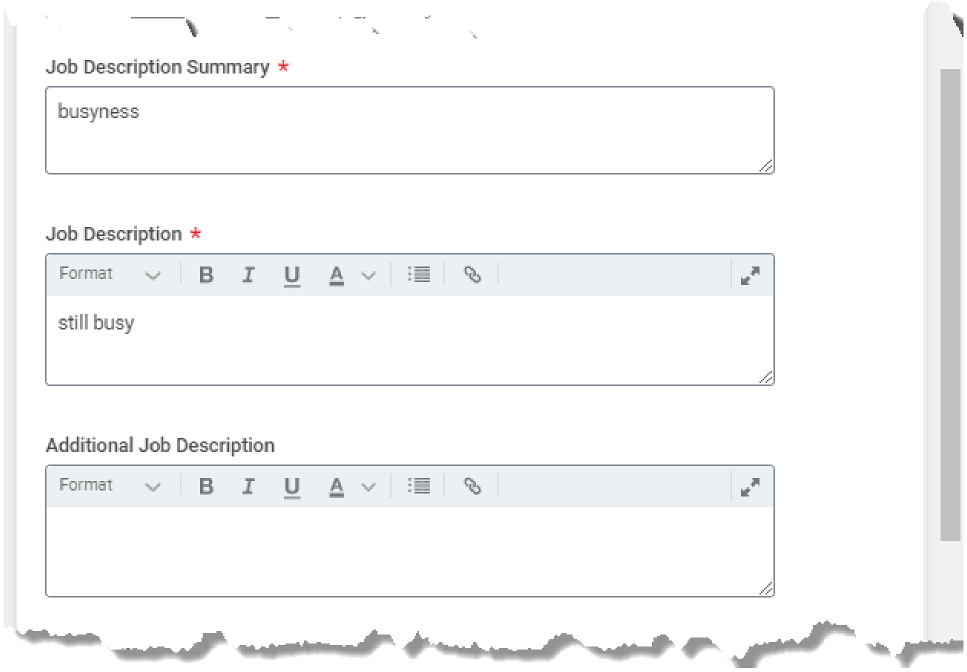
13. Enter **Job Posting Title** – this can be your Working Title and this is what will show in the "advertisement."
14. Click to edit **Job Profile** if needed – this will default in from the Position Restrictions.



15. Enter the **Job Description Summary**.
    a. Description, Examples of Work.
16. Enter the **Job Description**.
    a. Minimum Qualifications, Preferred Qualifications.

17. Enter the **Additional Job Description**.

a. Other Qualifications, Knowledge, Skills, and Abilities.



18. Click Worker Sub-Type to edit.

19. If the job is full-time, click **Full time**. Otherwise, choose **Part time**.

20. Click and select **Remote Type**.

21. If necessary, change the **Primary Location**.

a. The Primary Job Posting Location will update based on the Primary Location selected.

22. If the Job is Part time, enter a Scheduled Weekly Hours value less than 40.

23. Questionnaires.
    a. Leave both the Internal Posting Questionnaire and the External Posting Questionnaire.
    b. If any additional questionnaires are needed, they need to have been created prior to you starting this process. If that is true, you need to CANCEL this event and start it over.
24. Click **Next**.

Organizations

25. Continuing through the process, click the **Pencil Icon** to edit any of the **Organization Assignments**. These are the Organization Assignments that you have come to know and love. Enter all appropriately.
    a. Enter **Company**.
    b. Enter **Cost Center**.
    c. Continue down the page to complete any other information as needed. The following are required, although not marked with an asterisk.
        i. SBU
        ii. EDC Group
        iii. Budget Program Number
        iv. Type of Location
26. Click **Next**.

Attach any needed documentation.

Track any documentation related to your requisition.

27. Click **Next**.

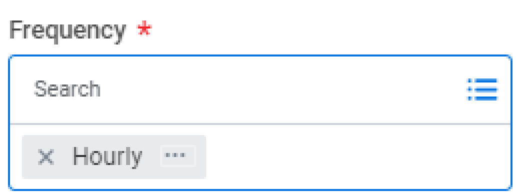
Review the Summary

You can edit items on the Summary screen, if needed.

28. Click **Submit,** if ready to move forward, or **Save for Later**.

Click Open to proceed to the Request Requisition Compensation

29. The Guidelines should populate in.
30. In the Salary section, verify that the Hourly Rate is the Minimum Hire Rate. If necessary, change the amount.
    a. The ONLY two Frequencies we use are Hourly and Annual. We do not use ANY OTHER frequencies.



        i. Hourly Plan – use when the Pay Rate Type is Hourly Exempt or Hourly Non-Exempt and ALWAYS use this for Part time positions.
            (1) Hourly comp amounts always need to have three decimal places!
        ii. Salary Plan – use when the Pay Rate Type is Salary Exempt or Salary Non-Exempt ONLY.
            (1) Delete the Hourly Plan assignment.
            (2) Click the Add button to add in a Salary Plan instead.

(3) If you are adding a Salary Plan assignment, use an Annual amount and NOT Hourly. This is ONLY to be used based on the Pay Rate Type mentioned above.
(4) Annual comp amounts always need to have two decimal places!

31. Click **Submit**.

Click Open to Configure Supplementary Questionnaires for Job Requisition

32. You can add other questionnaires.
   a. However, the questionnaire would have had to have been created prior to this process being started.

33. Click Submit.

Success! Event submitted.

Goes to State Recruiting for Review. Once approved, it will come back to your Workday Inbox

   a. If the event is **Sent Back** to you (in Workday) by a State Recruiter, you will need to fix the issue, as outlined by that Recruiter, and re-submit.

Task to Assign Roles

34. Click on the event.
35. Click Primary Recruiter and assign it to whomever is the Primary Recruiter for this Requisition.
36. Click **Submit**.

Click Open to view the Post Job Task

37. Click the appropriate Job Posting Site, based on the Recruiting Instruction you selected earlier.
   a. If it is Internal and External, you will click both Internal and External Career Site.

38. Click OK.
39. You must input an End Date (Closing Date) for both Internal and External sites, if selected.
NOTE: **Enter a Job Posting End Date to reflect the closing date per labor contracts or applicable rules or policy.**
40. Click **Submit**.

Attach Calendars and Templates

Click To Do or Skip
SEPARATE USER GUIDE
Click OK

Set Interview Team and Candidate Reminders for Interviews.

Click To Do or Skip
SEPARATE USER GUIDE
Click OK

DONE!!!

Create Prospect

The objective of this guide is to create a prospect.

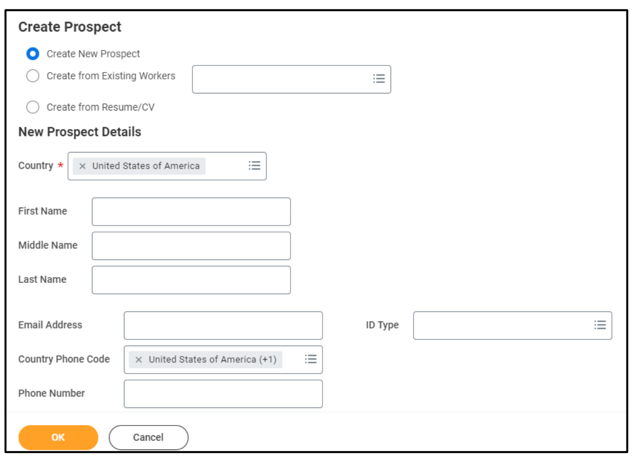
Security Role

- Recruiter

Contents

Create Prospect

1. Initiate the task by complete a. or b.
   a. Select Recruiting Dashboard.
   b. Select **Create Prospect** from the **Actions** (see screenshot at right).
   c. Type **Create Prospect** into the search bar and select the associated task.
2. Select **Create New Prospect**. NOTE: From the Create Prospect page, you can choose to Create New Prospect, Create from Existing Workers, or Create from Resume/CV.
3. Enter **New Prospect Details**.



4. Complete the available details for the prospect, such as contact information, experience, etc. (NOTE: Email address is required). You may also attach a Resume/CV by selecting the Resume tab.
5. Click **OK**.

Prospect Consent

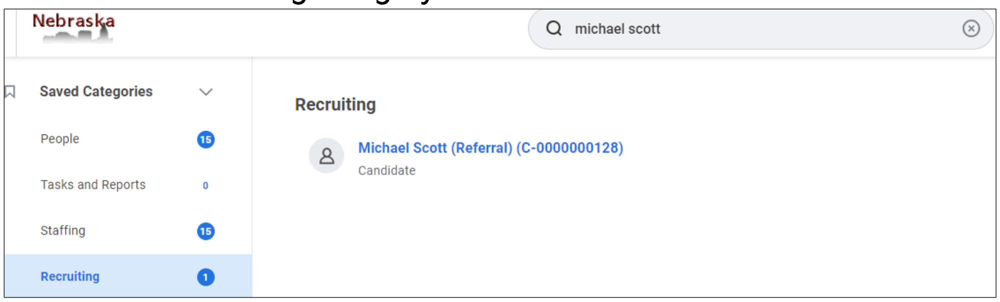
6. IMPORTANT NOTE: Creating a prospect will generate an automatic email notification to the prospect asking them to agree to receive communication from the State of Nebraska. **The prospect must accept these terms and conditions before any additional communication generate via Workday will be sent.**
7. Monitor the prospect's Consent Status in the header card for each prospect.
8. Use **View Prospect Consent Statuses** report to monitor.

a. Resend consent request by using checkbox next to desired prospect and clicking **Request Consent**.

Add to Candidate Pool

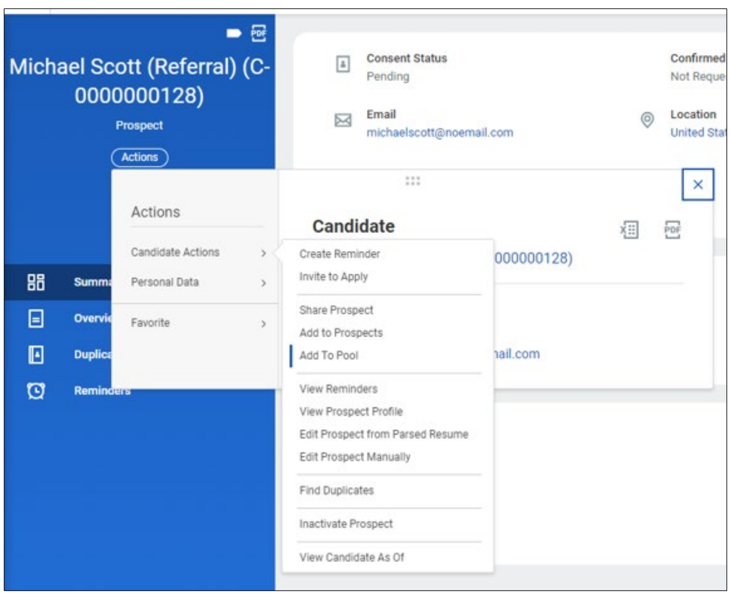
9. Search for prospect by typing candidate name in search bar.

10. Candidates will be under Recruiting category.

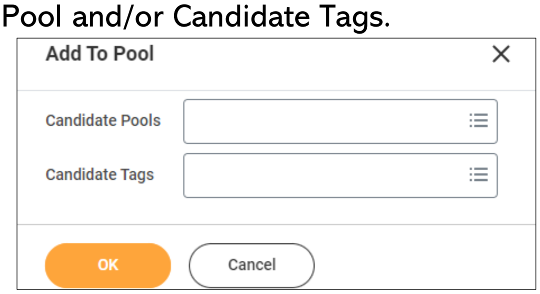


11. Click on prospect to open prospect profile.

12. In the blue bar, click Actions > Candidate Actions > Add to Pool.



13. Select appropriate Candidate Pool and/or Candidate Tags.



14. Click **OK**.

Hiring Manager Recruiting Guide

The objective of this guide is to outline potential actions hiring managers can complete within the Recruiting module.

Security Role

- Hiring Manager

Check with your HR or Talent Acquisition Team on required steps for your agency processes!

Contents

Start Job Requisition

1. Select a Type **Start Job Requisition** in the search bar.
2. Select **Start Job Requisition** task.
   a. Under Basic Information, choose to **replace a worker** or **add a worker**.
      i. If you choose **replace a worker**, select **worker** to replace.
      ii. If you choose **add a worker**, select **position number** for this job. NOTE: Positions must be created prior to starting a requisition.
   b. The Job Profile will default based on the position and this should not be changed.
   c. The **Job Title** can be updated to a working title to be used in the job posting.
   d. The following fields will appear on the job posting and must contain the following, as applicable:
      i. **Job Description Summary** – Description, Examples of Work.
      ii. **Job Description** – Minimum Qualifications, Preferred Qualifications.
         (a) Other Qualifications and Knowledge, Skills and Abilities can be listed here as well.
3. Select the appropriate answer regarding **Remote** positions.
4. The **location** will default based on the position but can be updated as needed.
5. Select **Employee** and then select **worker type** and **time type**.
6. Check that the Cost Center information is filed in.
7. Under **Recruiting Information**, select As Soon As Possible for when the worker should start (so as not to unintentionally delay any hiring events).
8. In **Recruiting Instruction**, select if you would like the job to be posted internal or external.
9. Select the appropriate reason from the list on why you are creating this job.
10. Click **Submit**.
    - NOTE: The requisition will now go to the agency's recruiter(s) for next steps.

Review Requisitions

11. Type the hiring manager's name in the search bar and click the appropriate supervisory

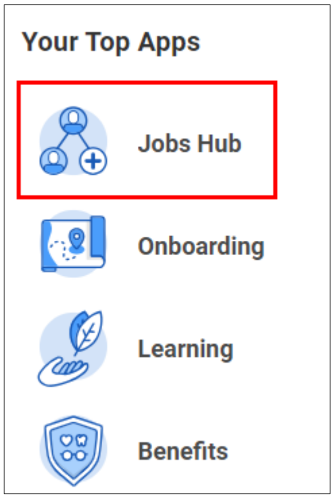
organization.

12. Click the **Staffing** tab to identify open requisitions within the supervisory organization.
13. Under **Effective Job Requisition**, click the title of the requisition to open the requisition.
14. Review information within the requisition:
    a. **Overview** – Shows Candidates by Active Stage.
    b. **Candidates** – Provides list of all candidates that have applied to the posting and their current status.
    c. **Details** – Includes details that were submitted on the requisition.
    d. **Organization** – Includes organizations tied to the position(s).
    e. **Job Postings** – Includes active job postings, include link to external career site.

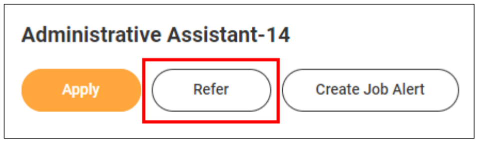
Refer a Candidate

NOTE: This is accessible by all teammates, and not just hiring managers.

15. Access the **Jobs Hub** from your Apps.



16. Click **Browse Jobs** in the menu on the left side of the screen.
17. Click on the desired job.
18. Click the **Refer** button.



19. Compete the required **Referral D**etails, including the **First Name**, **Last Name** and **email address** of person being referred, as well as any other applicable details.
20. Select how you know the person in the **Relationship** field.
21. Enter any applicable **comments**.
22. Click **Submit**.
    a. Once submitted, the referred person will receive an email with information about the job and instructions to apply.

Complete Manager Application Review

23. If a Recruiter moves a candidate forward for **Manager Application Review**, the Hiring Manager will receive a task to review the application. Open the task from inbox.
24. Review relevant information on application.
25. Select next step by clicking one of the following two buttons found at the bottom of the screen:

   b. **Move Forward** – Select appropriate next step.
   c. **Decline** – Select appropriate disposition (note, dispositioning a candidate will trigger an automatic notice to the candidate letting them know they were not selected).

26. If the application is moved forward, the Recruiter will be assigned the next task.

Give Interview Feedback

27. Once a Recruiter records a candidate's scheduled interview, a task will be delivered to inbox to Giver Interview Feedback.
    - NOTE: The Recruiter can move a candidate forward without a hiring manager completing this task.
28. Select appropriate **Rating**:
    a. Do not recommend.
    b. Recommend but not top candidate.
    c. Recommend.
29. Enter any applicable **Overall Comments**.
    - NOTE: Comments may become public record once recorded in system.
30. Click **Submit**.
31. Review Information as needed.
32. Click **Done**.
33. Feedback is returned to Recruiter for next steps.

Onboarding Set-Up

1. Onboarding set-up is completed once HR completes the hire process. This is a required step for hiring managers and will appear as a task in the hiring manager's inbox.
2. See **Onboarding Set-Up Manager Guide** for instructions.

Job Posting Actions and Closing Requisitions

The objective of this guide is to complete Job Posting Actions, including Close Requisition and Close Evergreen Requisition.

- Access Posting
- Unpost
- Evergreen Requisition Close
- Job Requisition Close
- Disposition Remaining Applicants

Security Role

- Recruiter

Contents

Let's Review How to Manage Job Postings from the Job Requisition

1. Locate the **Job Requisition** related to the job posting.
2. Go to the **Job Postings** tab.
3. If the job is actively posted, each posting type will be listed along with associated Posting End Date and url information.
   a. If you need a closing date extended or an active job posting closed on a requisition that will be filled, send request to AS.LinkHelp@nebraska.gov.
      i. Reminder: All applications received on a job posting MUST be considered for classified positions.
4. To repost a closed posting on the same requisition, click **Post Job**.
5. Select **the** appropriate **Job Posting Site**(s).
6. Click OK.
7. Set **End Date** for posting based on applicable labor contract, Personnel Rules, or policy.
8. Click **Submit**.
9. Posting will go to State Recruiting for approval prior to being available on career sites.

Let's Review How to Close an Evergreen Requisition

1. In the **Search bar** type **Close Evergreen Requisition**.
2. Select **Evergreen Requisition to Close**.
3. Select **Reason** to close.
4. Enter **Close Date**.
5. Click **Submit**.
6. If the job posting is still active, State Recruiting will get a task to close the job posting.

Let's Review How to Close a Job Requisition

Note: Moving a candidate to the Ready for Hire step, will automatically mark the requisition as Filled.

1. In the **Search bar** type **Close Job Requisition**.
2. Select **Job Requisition to Close**.
3. Select **Reason** to close.
4. Enter **Close Date**.
5. Click **Submit**.
    - **Note:** If the job is still posted, closing the requisition will also close the job posting.
6. The Recruiter will receive a task to disposition the remaining applications. The Job Requisition Audit Report can be used to determine what active candidates remain on closed job postings.

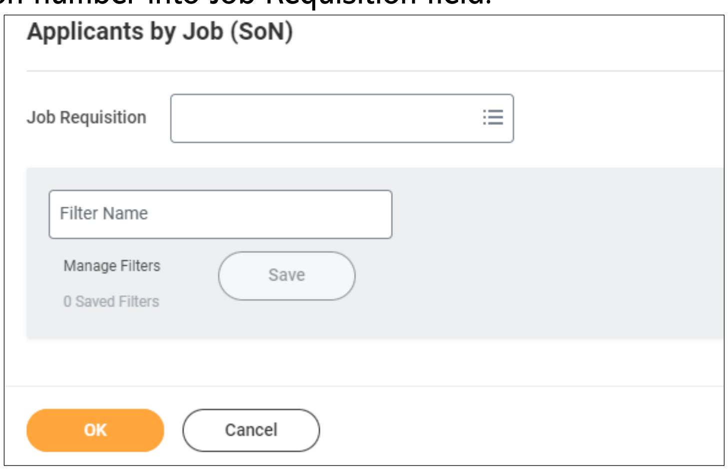
Let's Review How to Disposition Remaining Applicants

- **Note:** Once a candidate is moved to the Ready for Hire step, all active candidates will be automatically dispositioned as Not Selected for Hire. Workday sends automatic notifications notifying candidates they were not selected when dispositioned (some notifications are delayed).

1. If the position is not being filled, candidates will need to be manually dispositioned. Start by locating the job requisition in the Job Requisition Workspace.
2. Select the candidates that need to be dispositioned and click **Decline**.
3. Update the **disposition reasons** as appropriate.
    - **Note:** You cannot disposition candidates in the State Talent Acquisition Review step.
4. Click **OK**.

Let's Review How to Run an Applicants by Job Report

4. Type Applicants by Job (SoN) into the search bar. Select report of same name.
5. Enter Job Requisition number into Job Requisition field.



6. Click OK.
7. View results in Workday or Export to Excel as needed.

Create Job Alert

The objective of this guide is to access the Jobs Hub and complete related items such as creating job alerts and submitting an application.

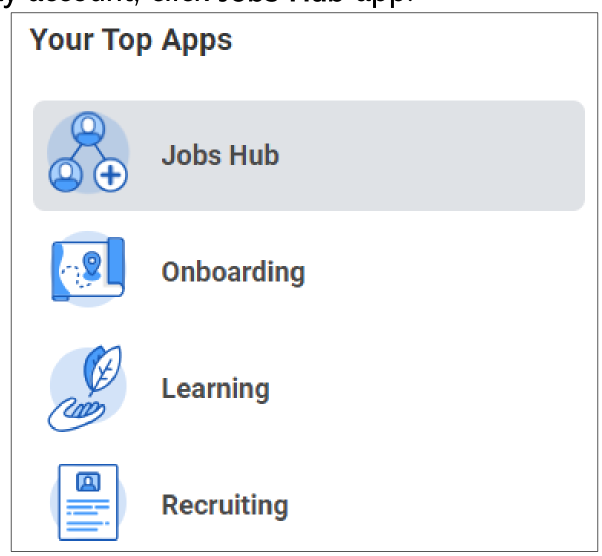
Security Role

- Employee as Self

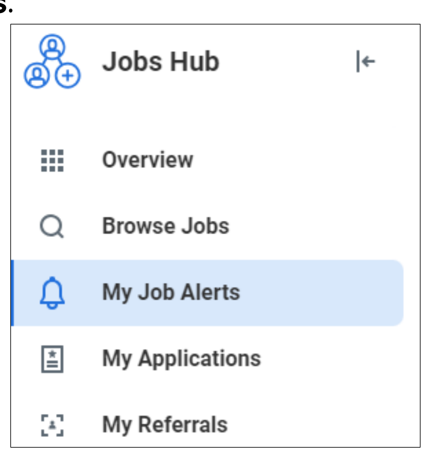
Contents

Create Job Alert

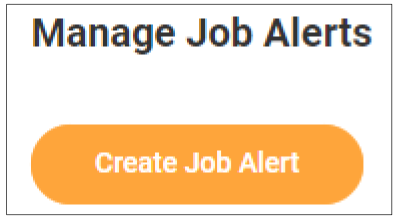
1. Once logged into Workday account, click **Jobs Hub** app.



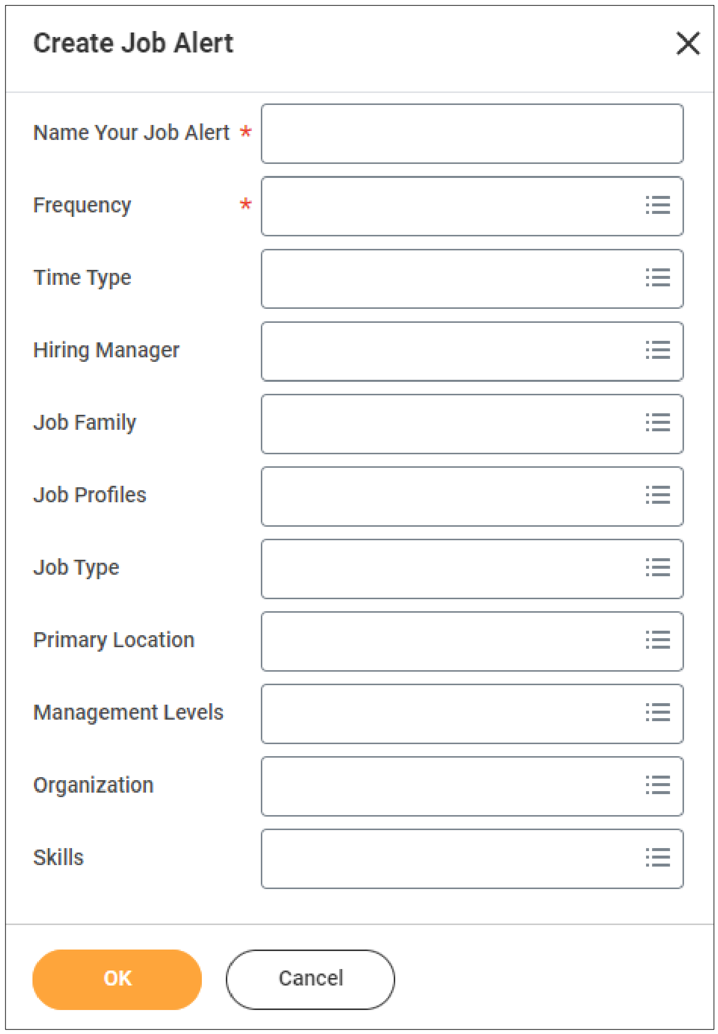
2. From menu, select **My Job Alerts**.



3. Under Manage Job Alerts, click Create Job Alert button.



4. On the Create Job Alert page, add relevant information:
   a. **Name Your Job Alert** – Enter a name for this specific job alert.
   b. **Frequency** – Select if you would like to be notified daily or weekly.
   c. Complete other fields as desired to narrow your job alerts to a specific location, job type, or hiring manager. NOTE: At least one filter must be selected.

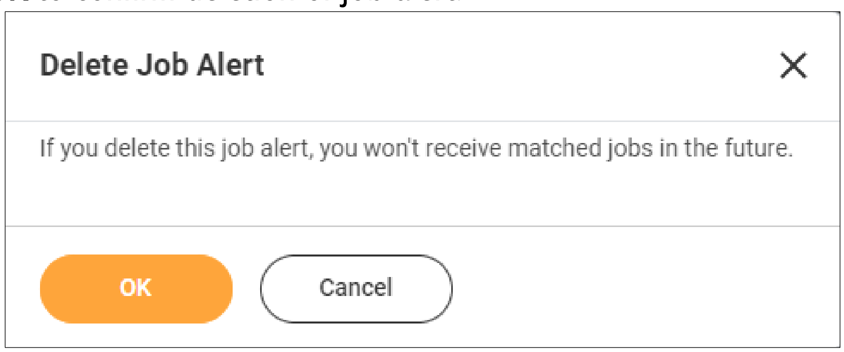


5. Click **OK**.

Manage Job Alerts

6. In Manage Job Alerts, find desired job alert and select **Manage** under Actions.

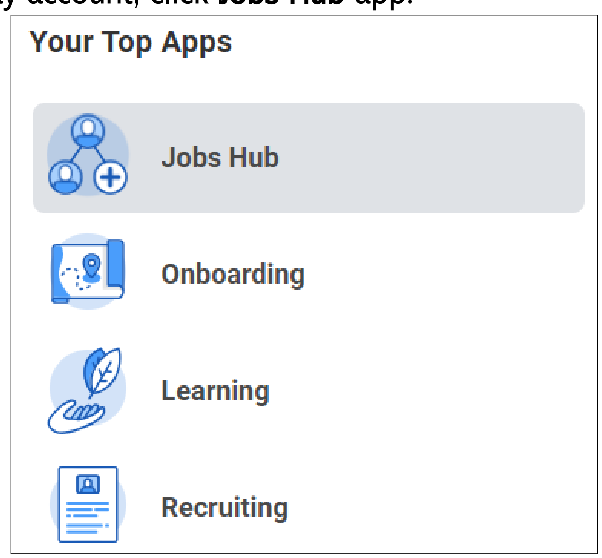
   a. Select **Edit** to edit details in job alert.
      i. Edit applicable details and click **OK**.
   b. Select **Delete** to delete job alert.
      i. Click **OK** to confirm deletion of job alert.



Submit Internal Application

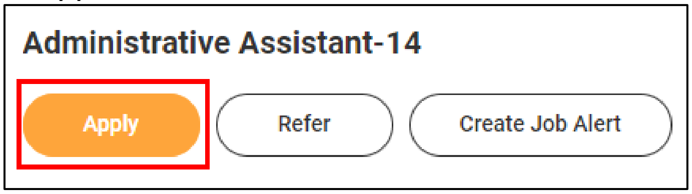
NOTE: Current State teammates submit job applications for any State of Nebraska jobs through the Workday Jobs Hub!

7. Once logged into Workday account, click **Jobs Hub** app.



8. From the menu, select Browse Jobs.
9. Scroll through available jobs, or use filters to narrow search results.
10. Click on job posting to review related details.

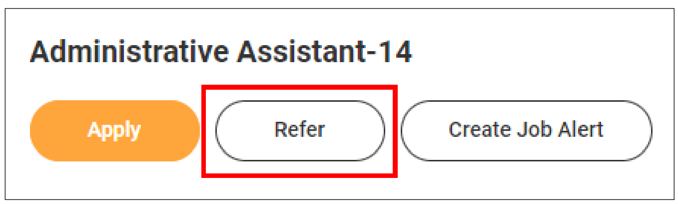
11. Click **Apply** to submit application.



12. If job history, education, certifications, and other pertinent information has been added to the Career Section of the Worker Profile, it will default on the application. If it does not default, it can be manually entered on the application.
    a. NOTE: Information must entered and appear on the application for it to be considered as part of the application for the job.
13. Upload **resume** as desired or applicable.
14. Record responses to required **questionnaires**.
15. Click **Submit**.

Refer a Candidate

16. Once logged into Workday account, click **Jobs Hub** app.
17. From the menu, click **Browse Jobs**.
18. Click on the desired job.
19. Click the **Refer** button.



20. Compete the required **Referral D**etails, including the **First Name**, **Last Name** and **email address** of person being referred, as well as any other applicable details.
21. Select how you know the person in the **Relationship** field.
22. Enter any applicable **comments**.
23. Click **Submit**.
    a. Once submitted, the referred person will receive an email with information about the job and instructions to apply.

View My Applications

24. Once logged into Workday account, click **Jobs Hub** app.
25. From the menu, click **My Applications**.
26. Review list of **Active** applications, including application status.
    a. Click **Inactive** tab to review inactive applications, including final status.

Navigate External Career Site

The objective of this guide is to navigate external career site.

Security Role

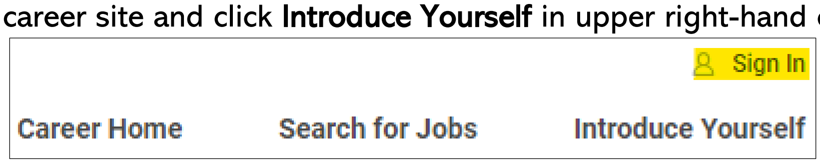
- External Candidate - Access External Career Site here: https://son.wd1.myworkdayjobs.com/NebraskaStateCareers.

Contents

Introduce Yourself

Not ready to complete an application but want to share your career interests with us? Introduce yourself!

1. Access external career site and click **Introduce Yourself** in upper right-hand corner.

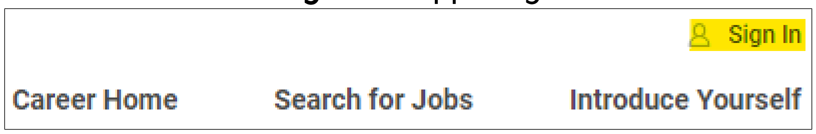


2. Complete required fields:
   a. **Country.**
   b. **First Name.**
   c. **Last Name.**
   d. **Email or Phone Number.**
   e. **Upload Resume/CV.**
3. Complete any other applicable information.
4. Check the box next to **I Agree**.
5. Click **Submit.**

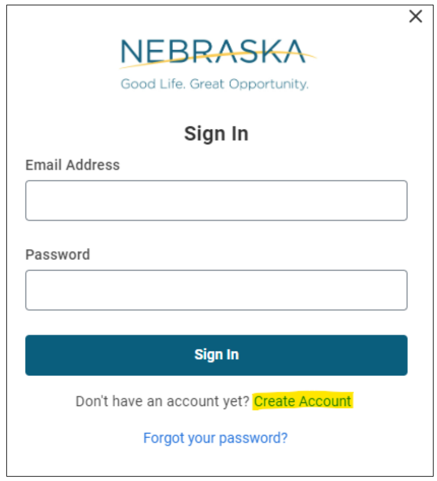
6. Information will be sent to State of Nebraska recruiters, who may contact you with potential job opportunities.

Create Candidate Home Account

7. Access external career site and click **Sign In** in upper right-hand corner.



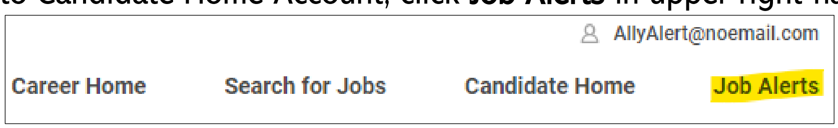
8. On the Sign In screen, click Create Account.



9. Enter **email address** and **create password** based on the password requirements.
10. Check the box next to **I agree**.
11. Click **Create Account**.

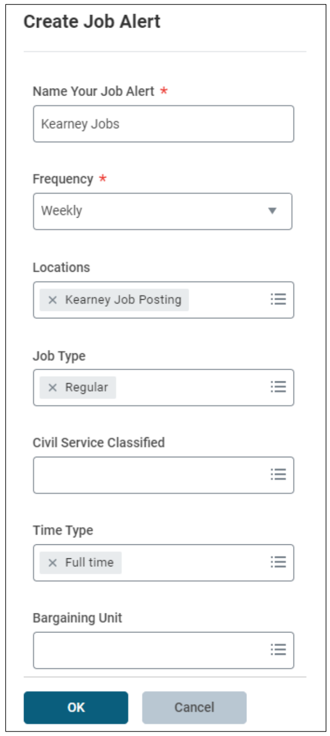
Create Job Alert

12. Once logged into Candidate Home Account, click **Job Alerts** in upper right-hand corner.



13. Under Manage Job Alerts, click **Create Job Alert** button.
14. On the Create Job Alert page, add relevant information:
    a. **Name Your Job Alert** – Enter a name for this specific job alert.
    b. **Frequency** – Select if you would like to be notified daily or weekly.

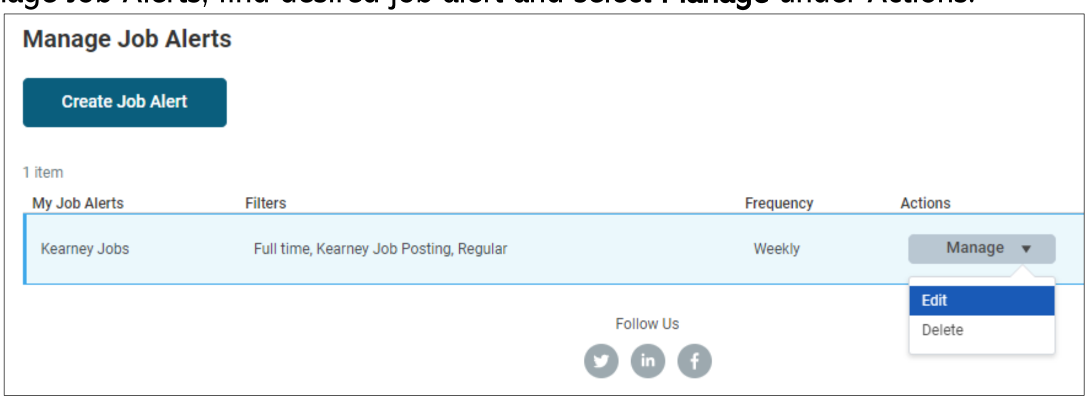
c. Complete other fields as desired to narrow your job alerts to a specific location, job type, or bargaining unit/field.



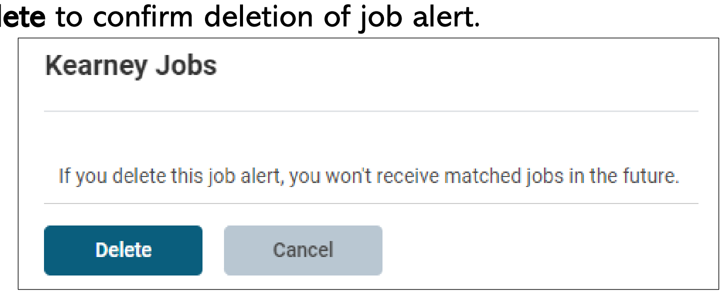
15. Click **OK**.

Manage Job Alerts

16. In Manage Job Alerts, find desired job alert and select **Manage** under Actions.



a. Select **Edit** to edit details in job alert.
   i. Edit applicable details and click **OK**.
b. Select **Delete** to delete job alert.
   i. Click **Delete** to confirm deletion of job alert.



Complete an Application

Sign In

17. Click Sign In.
    a. Sign in with your email and previously established password OR click Create Account (see Create Candidate Home Account above).

Find and Apply for a Job

18. Select the Job to which you want to apply.
    a. If desired, you can use the filters at the top of the page.
        i. Location
        ii. Time Type
        iii. Agency
        iv. More
19. Review the Job. If you want to Apply for that job, click the Apply button. Select one of the following:
    a. Autofill with Resume.
    b. Apply Manually.
    c. Use My Last Application.

Apply Manually

20. Complete the following sections:

My Information

21. How Did You Hear About Us?
22. Have you previously worked for the State of Nebraska? If yes, please answer the questions below. If not, please continue to the next page.
23. Country.
24. Legal Name
    a. First Name
    b. Last Name
    c. Check if appropriate … I have a preferred name.
25. Address
    a. Address Line 1
    b. City
    c. State
    d. Postal Code
26. Email Address
    a. Address Line 1
27. Phone – Select appropriate answers.
    a. Phone Device Type
    b. Country Phone Code
    c. Phone Number

Click Save and Continue.

Experience

28. Work Experience. Click Add Another, as needed.
    a. Add sections where applicable.
        i. Work Experience 1
            a) Job Title
            b) Company
            c) Location
            d) I currently work here. If you check that box, the "To" goes away.
                (i) From Date
                (ii) To Date
            (b) Role Description

When done adding and completing your Work Experience, click Save and Continue.

Education

29. Add all Schools Attended, as applicable. Click Add Another, as needed.
    i. Education1
        a) Select the School or University
        b) Enter Field of Study
        c) Enter Dates Attended
            (a) From Date
            (b) To Date
    ii. Role Description

Certifications

30. Add all certifications attained. NOTE: If your certification is not listed, select Other-Certification and add the details in the certification number box.
    ii. Certifications 1
        a) Certification
        b) Certification Number
        c) Issued Date
        d) Expiration Date
    iii. Attachments
        i. Add copy of certification, if applicable.

Languages

31. Add all languages as appropriate. Answer the questions related to each language before moving on.

Skills

32. Add all Skills, as applicable.
    i. The skills you add should be related to the job for which you are applying.

Resume/CV

33. Upload, if applicable.

Websites

34. List any websites that might be applicable.

Click Save and Continue.

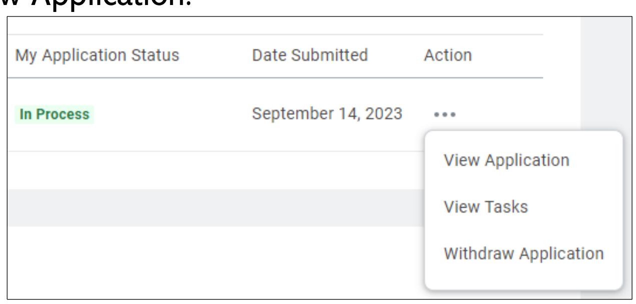
Application Questions

35. Complete the Application Questions.
    a. If you answer Yes to the Veterans Preference question, you will need to submit a copy of your DD214.
    b. OR, if appropriate, select Yes, but already submitted documentation.
    c. Click Save and Continue.
        i. If applicable, also complete any additional Application Questions.
    d. Click Save and Continue.
    e. Respond to the Voluntary Disclosures if desired.
    f. Review the Terms and Conditions and complete the acknowledgement.
    g. Click Save and Continue.
    h. Respond to the Voluntary Self-Identification of Disability if desired.
    i. Click Save and Continue.
    j. Review all information entered.
        i. Click Back if edits are needed.
    k. Click Submit.

Congratulations! Pop-up notification to confirm that application was submitted successfully.

Manage Candidate Home

36. Click Sign In.
37. Sign in with your email and previously established password OR click Create Account (see Create Candidate Home Account above).
38. Review My Tasks section to find tasks that need action.
39. Tasks pending action will be listed under To Do.
40. Actions previously completed will be listed under Completed.
41. Review My Applications section to find applications that have been submitted.
42. Active applications will be listed under Active and will show current status.
    a. Under Action, use the three dots to access available actions, such as View Application, View Tasks, or Withdraw Application.



43. Inactive applications will be listed under Inactive and will show final status.
44. Review Similar Jobs to find recommended jobs. If interested, submit an application to be considered.
45. Review My Account section to update contact information and/or edit account settings.

Hire Candidate

The objective of this guide is to walk you through the Hire a Candidate process, either starting from a Requisition or a Direct Hire.

Security Role

- HR Partner

Contents

Start from a Requisition

1. Once all of the Recruiting steps are completed, the Recruiter will start the hire process by initiating the "Ready for Hire" from the Candidate Profile.
2. This kicks off the "Hire: name of applicant" step that will show up in the HR Partner's inbox.
3. This will initiate the "Revise Employee Hire" for the HR Partner where the information can be reviewed and adjusted, as needed.
    a. Hire Date.
    b. Reason.
    c. Position selection box.
        i. The Employee Type cannot be changed in this process.
    d. Job Profile.
        i. The Time Type cannot be changed in this process.
    e. Location.

f. Pay Rate Type.
g. Do not EVER change the Default Weekly Hours; they always need to be 40.
h. Scheduled Weekly Hours, which will "adjust" the FTE percent.
i. Job Tile and Business Title can be edited here.
NOTE: adjustments to compensation may need Class and Comp and Budget approval for classified positions.
j. Review the fields, adjust as needed, add comments, and then click "Submit" when done.
k. Do not add:
    i. Additional Job Classifications NOR
    ii. Workers' Compensation Code Override.
l. First Day of Work – Leave as is.
m. Continuous Service Date – can adjust if needed and if you know what it should be.
n. Benefits Service Date – Leave Blank.
o. Company Service Date – this is the date the person started with your agencyl

Click Submit.

Start from a Direct Hire

You can start a Direct Hire from a Pre-hire or from a currently vacant job.

Up Next: Assign Organizations.

1. Continue through the process, click the Pencil Icon to edit any of the Organization Assignments. These are the Organization Assignments that you have come to know and love. Enter all appropriately.
    a. Enter **Company**.
    b. Enter **Cost Center**.
    c. Continue down the page to complete any other information as needed. The following are required, although not marked with an asterisk.
        i. SBU
        ii. EDC Group
        iii. Budget Program Number
        iv. Type of Location
2. Click **Submit**.

Up Next: Propose Compensation Hire

1. At the top, you will see the Effective Date and Reason, which cannot be changed on this page.
2. Scroll to the Guidelines section to verify that the Comp Grade listed is correct.
3. Scroll to the Salary section.
    - **PLEASE NOTE:** Before you click submit on the compensation piece of this hire event, MAKE SURE that there is one, and only one, Plan Assignment in the compensation section.
4. If the compensation plan defaulted to a Salary Plan and you need an Hourly Plan (or vice versa), you MUST remove the plan you do not need and add what you do need. Hover over that plan and then click the "ex" on the right side of the screen (see screenshot).
5. If there is no plan listed, you need to add one. Click Add in the Salary section (screenshot).
    a. When you click Add, or click in an existing Plan Assignment, it will open the Compensation Plan information.

i. For Compensation Plan, click in the box and type hourly or salary, whichever fits the guidelines for this position, and then press enter … it should populate with the selected plan.

b. Enter the salary amount in the Amount field.

i. If you type the amount and then see an error message, and, on clicking the error message, you see, “Error - Amount – The amount entered has too many digits beyond the decimal point.”, select the correct Frequency (2.e. below), and it should go away.

c. Select the correct Frequency to match the Compensation Plan you selected, i.e., **IMPORTANT:**

i. If you selected Hourly Plan, the Frequency needs to be Hourly, **with three decimal places**.

ii. If you selected Salary Plan, the Frequency needs to be Annual, with two decimal places.

d. Click in the grey area to the left or right on the screen to see your changes.

e. If you see another error message, with this text “Error - Amount – Element Content 'Amount' is required, on internal element 'Request Compensation Change Salary Plan Subedit'”, here is a workaround.

i. Highlight the dollar amount and delete it.

ii. Re-select the correct Frequency.

4. Comments – enter comments, as needed.
5. Select one of the following:
   a. Submit – to submit the compensation plan and move to the next step in the hire process.
   b. Deny – to deny the compensation plan and stop the hire process.
   c. Save for Later – to save your changes but not submit; returns the item to your Inbox.
   d. Close – to close the compensation screen without saving changes; returns the item to your Inbox.

If you are a classified agency, this action now moves to State Personnel and State Budget Office for approval.

Up Next: Edit Service Dates

Once you receive approval from State Personnel (if required) and State Budget Division (if required), you will see Service Dates Change task in your Inbox. Click Open (see screenshot).

1. The Hire Date defaults in and cannot be changed.
2. The **Original Hire Date** defaults to the most recent hire event unless they have a previous work record in Workday.
   a. If the employee already has a record in the Payroll & Financial Center, then you need to change the Original Hire Date to match the Original Hire Date from the Payroll & Financial Center. If you do not, this record will not be accepted in the Payroll & Financial Center.
3. The **Continuous Service Date** defaults to the Hire Date as well. If the employee is a rehire and is eligible to be credited with prior service, change this date accordingly.
4. Enter the **Company Service Date** (the date the employee started with your agency).
5. Some agencies use the **Seniority Date** for “Classification Seniority.” It defaults to the Hire Date; change it, if needed.
6. Some agencies use the **Vesting Date** for “Date in Current Position;” change it, if needed.
7. Unless you have approval (or other instructions) from State Personnel, please do not enter dates in any of the other fields.
8. Click Submit.

Up Next: Edit IDs

This is where you enter any applicable ID information for this person, including National IDs (i.e., social security number), Additional Government IDs, Passports, Visas, and/or Licenses. Even if you do not yet have all of this documentation, you at least need to enter a social security number to proceed with the hire process.

- You will need to use the Employee Look-up in the Payroll & Financial Center to see if the person was previously employed with the State. Workday will allow you to enter a duplicate social security number, but the process will error out with the integration into the Payment & Financial Center.
- You will need two forms of ID for the I-9 information, unless you have a passport.

1. Click the plus sign to add an ID in the appropriate section. National IDs is where you enter the SSN information.
2. If you wish to delete an ID, click the minus sign to the left of the ID row.
3. To enter the Driver's License information.
    - In the License ID Type, select Driver's License.
    - Type part or all of the issuing state in the Issued by Country Region field, then press enter to populate with the name of the State.
    - Type the number from the Driver License in the Identification # field.
    - Type the Issued Date.
    - Type the Expiration Date.
    - The Verification Date will default to "today."
4. Select one of the following:
    a. Approve – to approve the ID information and move to the next step.
    b. Deny – to deny the ID information and cancel the process.
    c. Cancel – to cancel changes and return item to your Inbox.

State Personnel will enter the eVerify confirmation number into EWC (when eVerify is completed for this employee) and email the agency; it is shown in the **Other IDs** section.

Up Next: Assign Pay Group

Select the Pay Group (* required) for the Payroll & Financial Center.

1. Click the prompt in the Proposed Pay Group selection box, go to Pay Groups, and pick the correct Pay Group.
2. Select one of the following:
    a. Submit – to submit the pay group and move to the next step.
    b. Save for Later – to save the information but not submit; returns item to your Inbox.
    c. Cancel – to cancel the process and not save changes; returns item to your Inbox.

IF the person was previously employed AND you are an agency Security Partner, you will see …

Up Next: Reset Worker's Workday Account Password To Do.

NOTE: If you are not a Security Partner, you will have to wait for an agency Security Partner to complete this step!

Up Next: Add Probation Period Click Open OR Skip

This is an optional To Do. If you want to track probation periods, you will need to click the To Do. If you are not tracking probation periods, you can click Skip. If you click Skip, the system will require you to enter a reason.
If you click To Do:

1. Click the Add Probation Period button.
2. Type the worker's name in the Worker field (screenshot).
3. Click OK.
4. On the Add Probation Period screen (see screenshot), complete the following information:
    a. Start Date (Defaults to Hire Date).
    b. End Date (Usually six months from Hire Date).
    c. Type (Original Probation).
    d. Reason (New Hire/Rehire).
    e. You can add comments about the probation period in the Note field, if desired. However, be careful what you enter … it becomes permanent and is visible to others who have access to the record.
5. Click Submit
6. You should see a message that the process has successfully completed.
7. Return to your Inbox.
8. Find and click the To Do: Add Probation Period item in your Inbox.
9. Click Submit to move the process to the next step.

Up Next: Enter Retirement and Leaves To Do

You will need to manually enter a new employee's retirement/leave if you are hiring an employee from a previous date. When you click this To Do button, you will see the following instructions:

- You have an employee who recently experienced an employment status change. If you need to enter Retirement and / or Leaves, you can access this event off of the new hire's name > Related Actions > Benefits > Change Benefits. Select the 'Retirement/Leave Change …' event (for Monthly or Bi-Weekly, whichever is correct). Use the employee's date for the effective date. If your employee does not have retirement or leaves or they did not change because of the employment status change, you can disregard this reminder. Thank you!

Please do the following:

1. Type the employee name in the search box, and then press enter.
2. Click Related Actions icon to the right of the name. Click Benefits, and then select Change Benefits.
3. In the Benefit Event Type, select whichever of the following is appropriate:
    a. Retirement and/or Leave Date Entry Biweekly.
    b. Retirement and/or Leave Date Entry Monthly.
4. In the Benefit Event Date, enter the hire date (effective date), and then Tab to the next field. Unlike when you set up new employee's benefits, you need to use the actual hire date here. The Submit Elections By is a calculated field and will auto-populate.
5. After completing, select one of the following:
    a. Submit – to submit the benefit change.
    b. Save for Later – to save the information but not submit.
    c. Cancel – to cancel the process; does not save changes and returns item to your Inbox.

Up Next: (Manager) Onboarding Setup for Hire: New Teammate

This step is assigned to the person's Manager. This step MUST be completed for the event to come back to the HR Partner.
NOTE: There is a Manager User Guide to walk the Manager through the Onboarding Setup process.

Up Next: Benefits Partner – To Do: Change Worker Wellness Data

This step is for a Benefits Partner to complete.

Up Next: New Teammate Onboarding

IF the New Teammate completes her/his Benefit Elections in the Onboarding process, the HR Partner will see the Benefit Change – New Hire step for Approval. HOWEVER, it will also go to the Benefits Team for Approval.

When done, the process will move back to the HR Partner for final processing.

Up Next: Complete Form I-9

See the I-9 User Guide for completing this section.

Up Next: Review for retro adjustments To Do

This To Do is a reminder to verify if new hires need their benefits to be retro adjusted for payroll. In order for the hire process to be considered complete, you need to click this item in your Inbox, whether or not you need to make retro adjustments for this employee.

1. In your Inbox, click the Review for retro adjustment: Benefit Change - New Hire: (employee name) for the new employee.
2. Click Submit.

IMPORTANT!
The Employee Payroll Update screen must be completed in PFC after you hire a new employee, and before the employee can be paid, and/or when any of the information shown on this screen changes. This is the only screen you will complete in PFC pertaining to employees. User Guide: https://das.nebraska.gov/personnel/user-guides.html > Workday (Employee Work Center) > Related Payroll Actions (in E1, a.k.a. PFC) > Payroll Update Quick Reference Guide.

Up Next: Complete Federal Withholding Elections

The State Accounting Team will have an item in their Workday Inbox to Approve the Federal Tax Election for Onboarding for (New Teammate).

New Teammate Onboarding

The objective of this guide is to review the Onboarding inbox actions for new Teammates in their inbox.

Security Role

- Worker as Self

Contents

Onboarding

1. On your Home Page, under Your Top Apps, click Onboarding.
2. In the Getting Started section, click the number above where it says "Ready."
3. Click on Update Basic Information item – Position / Worker Name.
    a. Complete all the mandatory fields marked with a red asterisk.
    b. Click Home Contact Information.
        i. Primary Address – click Add.
            1. Country.
            2. Address Line 1.
            3. DO NOT enter anything into Address Line 2.
            4. City.
            5. State.
            6. Postal Code.
            7. County (NOT Country).
            8. Usage, if applicable.
    c. If applicable, type your Primary Home Phone Number.
    d. If applicable, Type Primary Email Address.
    e. Click Submit.
4. Click on Update Personal Information item – Position / Worker Name.
    a. Select Gender.
    b. Enter Date of Birth.
    c. If desired, enter Marital Status.
    d. Select from the Race/Ethnicity list.
    e. Select the correct value from the Citizenship Status list.
    f. If desired, add Disability … click the Add button.

   g. If desired, add Military Service … click the Add button.
   h. Click Submit.
5. The next step is Change Emergency Contacts. In the Primary Emergency Contact section, update the following information:
   a. Complete all the mandatory fields marked with a red asterisk.
   b. You must add a Phone Number or an Email Address.
   c. Press Submit.
6. You can also add Alternate Emergency Contacts, if needed:
   a. Complete all the mandatory fields marked with a red asterisk.
   b. Press Submit.

Review Documents – W4N

7. Click the link for W-4N Fillable 12-2020.
8. Complete all required fields in the form.
9. Save a copy of the form to your computer.
10. Check the I Agree box.
11. Drag and drop your file to the grey box OR click Select files.

Payment Election Enrollment Event

12. Direct Deposit will populate in the “For Payroll“ prompt.
13. Select the Account Type.
14. Enter the Routing Transit Number.
15. Enter the Account Number.
16. Enter the Bank Name.
17. Account Nickname is optional.
    a. If you need to add other accounts, there is a separate User Guide for that.
18. Click Submit.

Name | Complete Form I-9 – Click Open

19. Verify that all of the following fields are correct;
    a. Name
    b. Address.
    c. Date of Birth.
    d. Social Security Number.
    e. Email Address.
    f. Phone Number.
20. Check the correct box in the “I attest“ section.
21. Check I Agree.
22. Check the appropriate box in the Preparer and/or Translator Certification section.
    a. If you check “A preparer(s) and/or ...“, the Preparer will have to complete all sections in the Signature of Preparer or Translator AND check the the I Agree box.
23. Click Submit.

Click Review Documents

24. Parking Agreement – complete the form to apply for State parking. Read the instructions carefully.
25. Click Submit.

Photo Change

26. Your agency HR staff will upload your photo at a later date, if applicable.
27. Otherwise, click the gear icon above this event, and then click Skip This Task.
28. Click OK.

Complete Federal Withholding Elections

29. Read the instructions and complete as instructed.
30. Check the I Agree box.
31. Click Submit.

Change Benefit Elections – see appropriate User Guide

Complete Onboarding Experience Survey

32. Open and complete the survey.
33. Click Submit.

Acceptance Criteria

34. Verify that each action taken from the inbox has modified the employee´s profile.
35. Verify that the New Team Experience group has received a notification about the employee onboarding.

Offer

The objective of this guide is how to handle Offer.

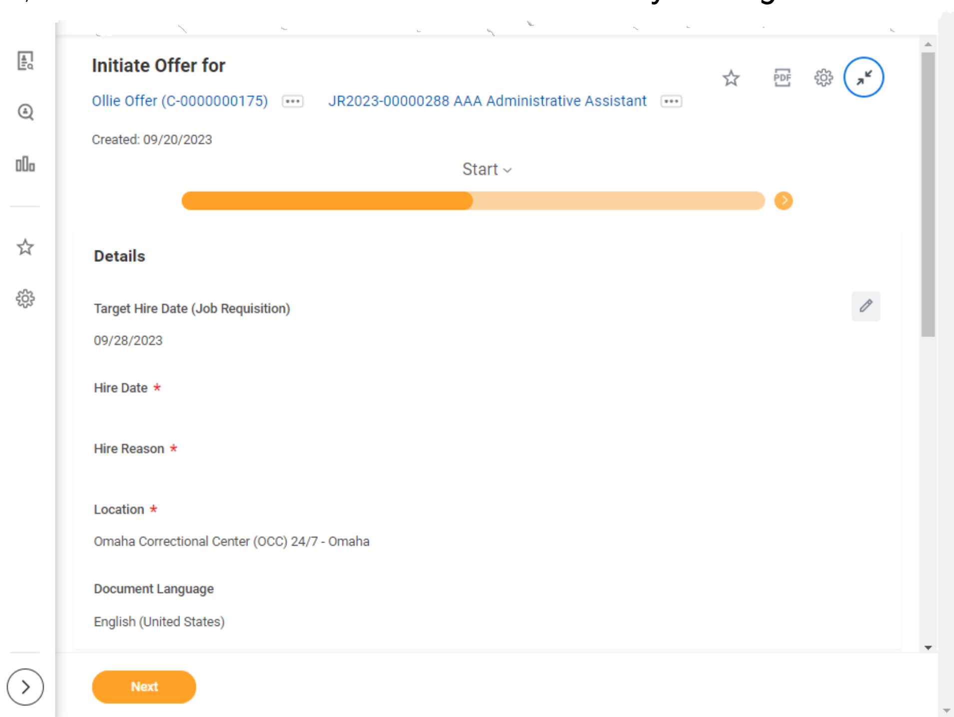
Security Role

- Recruiter

Contents

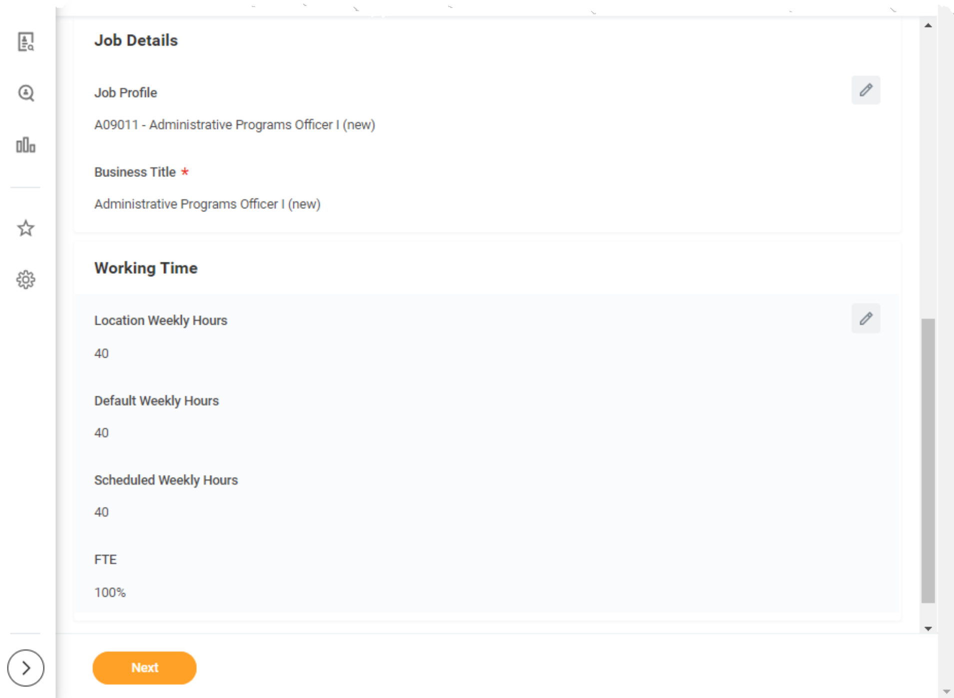
Start the Offer Process

1. From your Inbox, select the **Offer** task. Review all the **Details** by clicking the Pencil Icon.



2. Enter the **Hire Date**.
   a. Hire Date – when the person will start working.
3. Select the **Hire Reason**.
   a. DO NOT use "Add Additional Employee Job." This is not an option given our current systems.
4. Location.
5. Document Language.

6. Review **Working Time** by clicking the Pencil Icon.
   a. Change Scheduled Weekly Hours, IF NEEDED.



IMPORTANT NOTE: Do not EVER change the Default Weekly Hours. Those should ALWAYS be 40. Workday calculates the FTE by dividing the Scheduled Weekly Hours by the Default Weekly Hours; if they are both the same value, the FTE still shows as 100%!

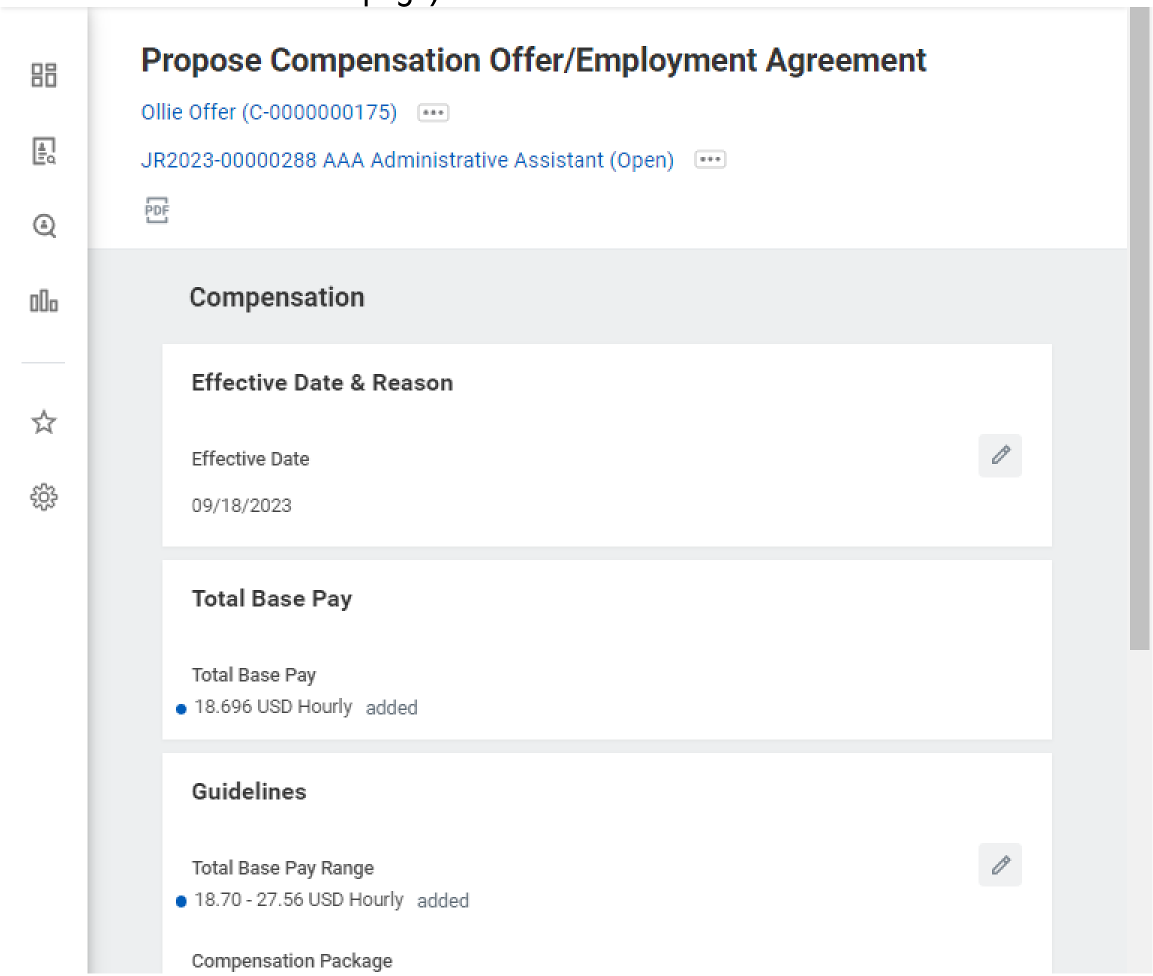
7. Select **Next**.
8. Select **Submit.**

After you Submit, you will get Success Event Submitted.

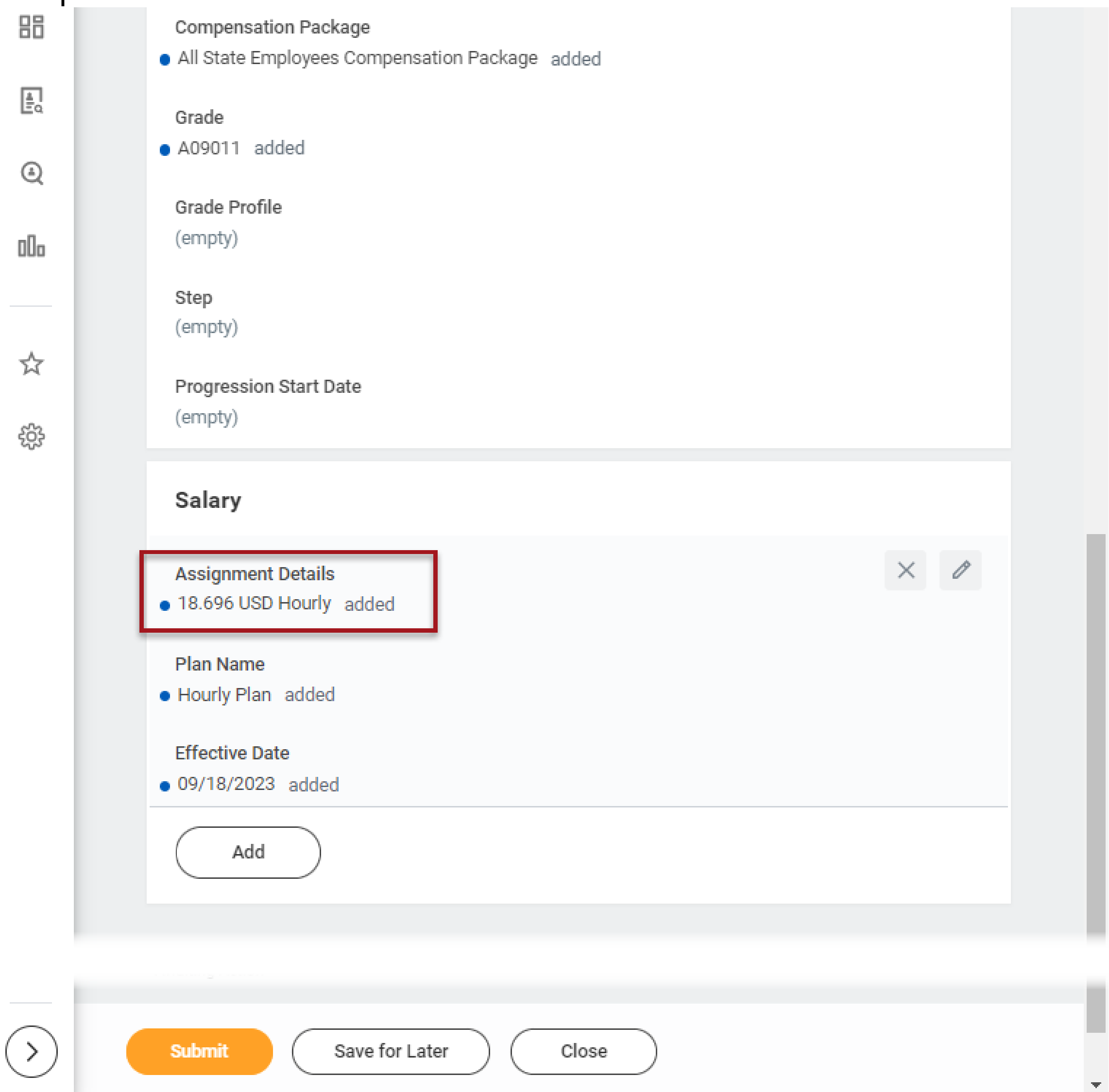
Propose Compensation

9. Click Open to complete the Propose Compensation Offer/Employment Agreement step.

10. Review Compensation information, ensuring that everything is correct, especially the compensation (see second screenshot on next page).



11. Verify Compensation …



12. If the position into which you are hiring the person will have either a Salary Exempt or Salary Non-Exempt Pay Rate Type, and your agency uses Annual salaries, BE SURE TO
   a. Click the "X" to the right of the Hourly Plan plan assignment.
   b. Click Add.
   c. In the Plan Name, select Salary Plan.
   d. Enter the Annual Rate in the Amount field.
   e. Make sure that the Frequency shows Annual.

13. The Salary Plan plan assignment CAN ONLY BE USED for Workers who are Full time. If a person is Part time, you must use an Hourly * Pay Rate Type and the Hourly Plan plan assignment.**

14. You should make sure that a person has one, and only one, Plan Assignment!

15. Click **Submit**.

Generate Offer Letter

16. From your Workday Inbox, select the Offer Letter item, then click Review to Generate Offer Document.

17. Review **Offer** document (see screenshot on next page).
   a. Add text, if appropriate, where there is **Red** text.

i. For example, where it says, "{Enter Agency Director Name Here}," type the name of your Agency Director.

b. Delete Red text, where appropriate.

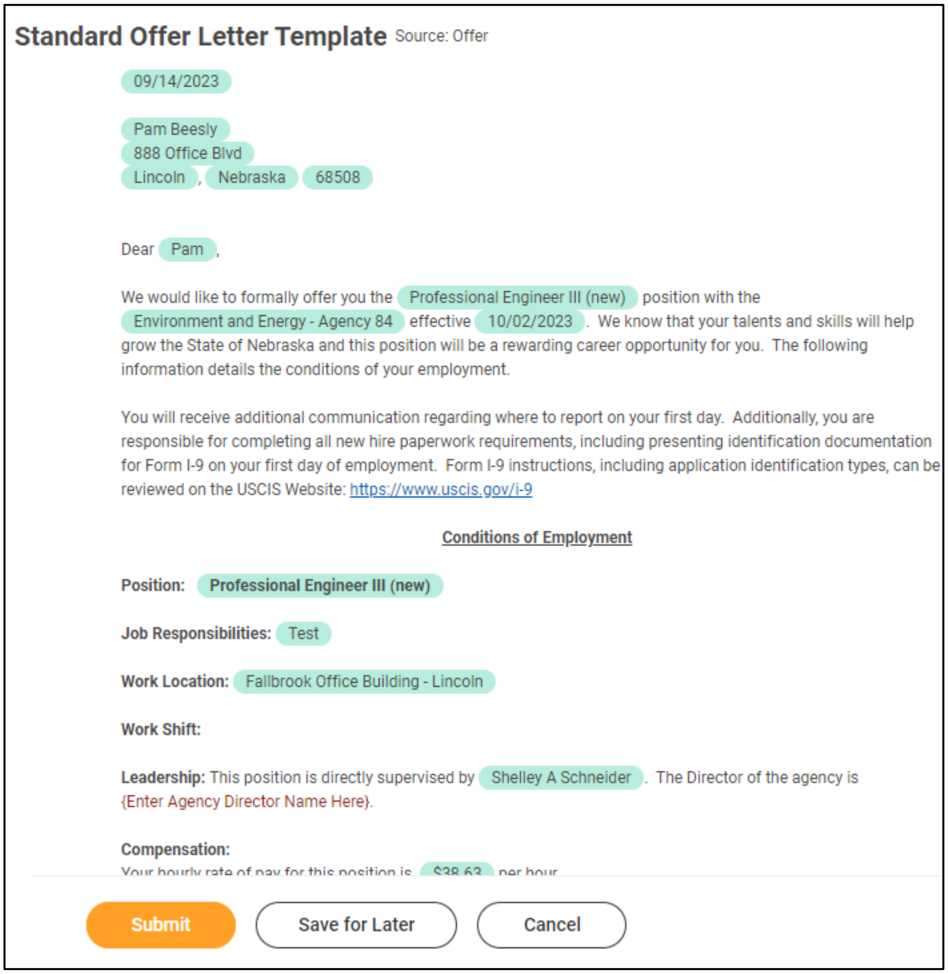
i. For example, in the Compensation section, where it says the following, remove the line that says {select one}, then remove the "incorrect" line for your agency.

(1) {select one}

(a) You will be paid on a biweekly basis every other Wednesday.

(b) You will be paid on a monthly basis.

18. Select **Submit**.



Standard Offer Letter Template Source: Offer

09/14/2023

Pam Beesly
888 Office Blvd
Lincoln , Nebraska 68508

Dear Pam ,

We would like to formally offer you the Professional Engineer III (new) position with the Environment and Energy - Agency 84 effective 10/02/2023 . We know that your talents and skills will help grow the State of Nebraska and this position will be a rewarding career opportunity for you. The following information details the conditions of your employment.

You will receive additional communication regarding where to report on your first day. Additionally, you are responsible for completing all new hire paperwork requirements, including presenting identification documentation for Form I-9 on your first day of employment. Form I-9 instructions, including application identification types, can be reviewed on the USCIS Website: https://www.uscis.gov/i-9

Conditions of Employment

Position: **Professional Engineer III (new)**

Job Responsibilities: Test

Work Location: Fallbrook Office Building - Lincoln

Work Shift:

Leadership: This position is directly supervised by Shelley A Schneider . The Director of the agency is {Enter Agency Director Name Here}.

Compensation:

Submit | Save for Later | Cancel

19. Upon clicking Submit, the Offer Letter is sent to the **Applicant**.

The Candidate will have to log in to the Career Site to

20. Accept the Offer.

21. Input Social Security Number.

22. Enter Personal Information.

Position has been accepted by the Candidate!

Onboarding Setup - Manager

The objective of this guide is to for a Manager to set up Onboarding for a new Teammate.

Security Role

- Manager

Contents

Setup Onboarding for New Teammate

1. If you see an Onboarding item in the "Awaiting Your Action" widget, click on that, or find the item in your Inbox (My Tasks).
2. Click the Onboarding Setup task.
3. Review the Message at the top of the page. Change, if desired.
4. People to Meet.
   a. Select the list of People you would like your new teammate to meet.
   b. You can search for names by clicking the selection box and typing part or all of the person's name, then press enter.
      i. Find the specific Teammates you want the new Teammate to meet.
5. Notify check Yes if you want a notification to go to the Teammate(s) to meet selected above. If no, uncheck Notify.
6. Notify Subject.
7. Notification Message is what is sent to the people if Notify is checked.
8. Helpful Contacts
   a. Select a list of People who can be helpful for your new teammate.
   b. Check Notify, IF applicable (same as above).
9. Enter your comments (optional).
10. Press Submit.

Process complete.

Acceptance Criteria

- Verify that onboarding has been initiated for the employee from the worker history or the inbox.

Screen and Move Candidate(s)
The objective of this guide is to Screen and Move Candidate(s).

Security Role
- Recruiter

Contents

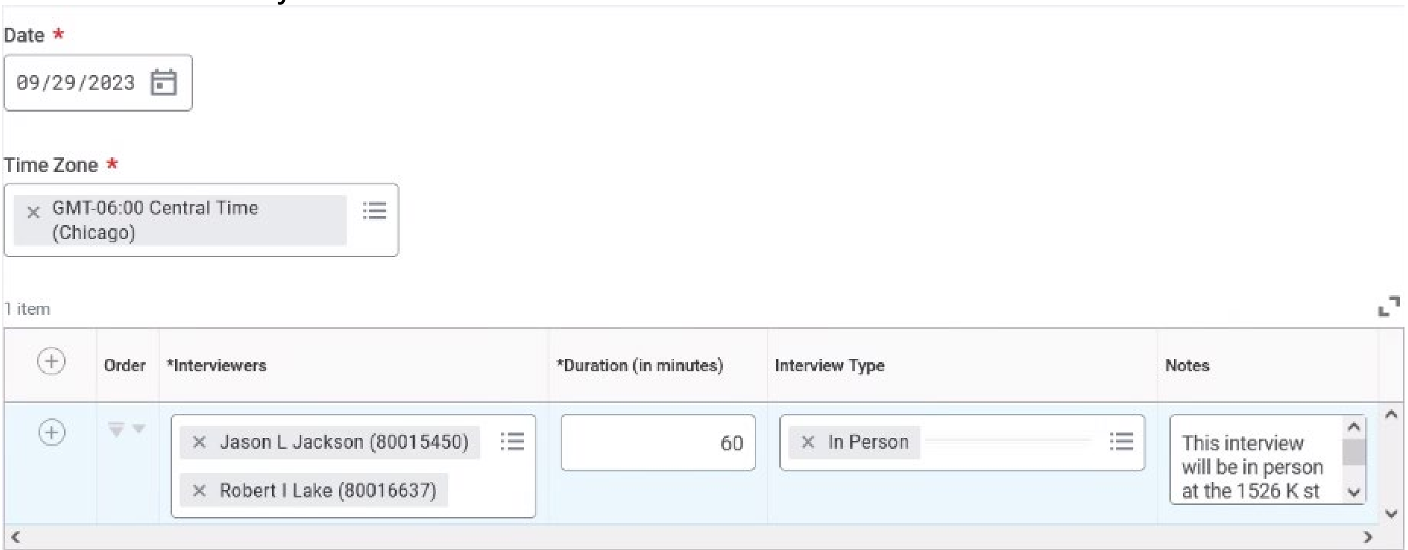
Move Candidates through Recruiting Stages
1. Select a Candidate. There are multiple ways to find your Candidates.
    a. Click the Candidate tab from the Recruiting Hub .
    b. Or, from your Inbox.
    c. Or, if you know the requisition you are working with, go to Job Requisitions, find, and click on that specific Req. From there, scroll down the page to find the Candidates.
2. Select the **Candidate(s)** to act upon.
3. Click on the Candidate name to begin screening.
4. From the **Candidate Home Screen,** you can view information about the applicant (see the blue section on the left of the screen).
5. After screening, you can take Actions using the Orange at the bottom of the page. You can
    a. Move Forward – you must complete at least one of the following steps to move on to the Offer stage.
        i. Interview
        ii. Recruiter Phone Screen
        iii. Manager Application Review
        iv. Manager Phone Screen
        v. Reference Check
        vi. Assessment
    b. Decline
        i. Screen - Candidate Withdrew

ii. Screen - Not selected for hire
iii. Screen - Not selected for interview
iv. Screen - Requisition Canceled
v. Screen - Unable to contact Candidate.

7. Click **OK**.

Interview

6. When you click Move Forward – Interview, the next is Schedule Interview.
    a. Schedule or Skip.
    b. Schedule allows you to record information about when the interview was scheduled.



7. After you pick the date and the people, the next screen is where you schedule the actual time.
8. Click Submit.

Manager Feedback

9. Interview feedback for the Manger.
10. Overall Feedback
    a. 3 – Do not recommend.
    b. 2 – Recommend but not top candidate.
    c. 1 – Recommend.

Recruiter

11. Acknowledge feedback from the Manger.
    a. Submit.

Interview Decision

a. Move Forward – you must complete at least one of the following steps to move on to the Offer stage.
    i. Additional Interview.
    ii. Assessment.
    iii. Reference Check.
    iv. Background Check.

        v. Offer.
    b. Decline
        i. Interview - Candidate Withdrew.
        ii. Interview – No show for interview.
        iii. Interview - Not selected for hire.
        iv. Interview - Requisition Canceled.
        v. Interview - Unable to contact Candidate.

Phone Screen
Manager Application Review
Manager Phone Screen
Reference Check
Assessment

Select Next Recruiting Stage

8. After all screenings and interviews have been completed, you can move Candidates Forward by checking the box to the left of their name in your Candidate Job Application page under the Candidate Recruiting Hub.

Move Forward to Offer

9. Click **Move Forward** and select appropriate Action (in our example, we are moving forward to an **Offer)**.
10. Click **OK**.

We will review how to handle Offer in the Offer guide.

Request SOS Temporary Position

The objective of this guide is to Request an SOS Temporary Position.

Security Role

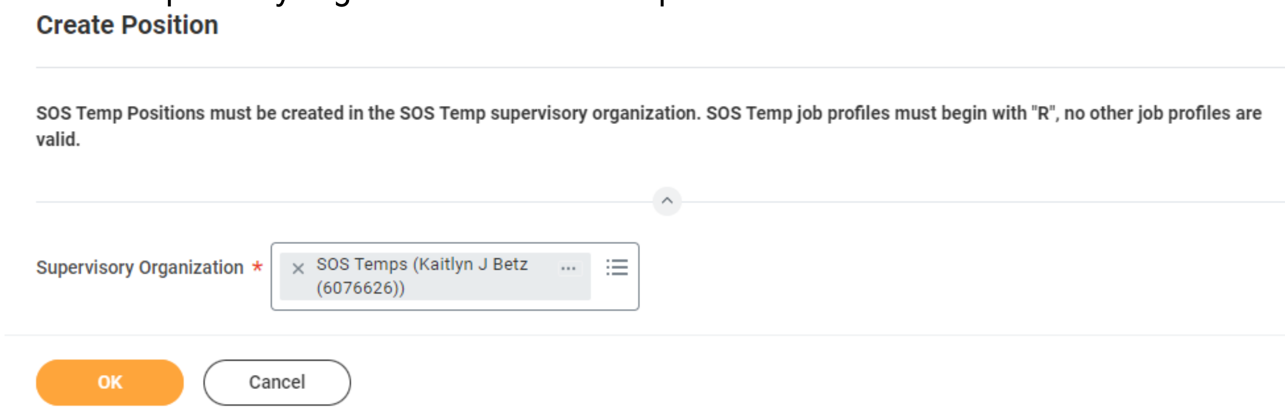
- Recruiter / SOS Position Requester

Contents

Create SOS Position

1. Start the process by typing Create Position into the search bar. Select the task.

2. Update the Supervisory Organization to "SOS Temps."



3. Select Create Position > Created Position > SOS Temporary as the Position Request Reason.
4. Update Job Posting Title to appropriate title, including "SOS" in the title (e.g. SOS Office Technician).
5. Update the Number of Positions if applicable.
6. Update the Availability Date (use today's date).
7. Update the Earliest Hire Date (use desired start date of SOS).
8. Select appropriate Job Profile.
   a. NOTE: The class code on the Job Profile MUST start with an "R" to reflect that it is a temporary position.
9. Select appropriate Location and Time Type.
10. Select Employee for Worker Type.
11. Select SOS Temporary < 6 mo. or SOS Temporary > 6 mo. for Worker Sub-Type (selection is dependent on anticipated length of assignment).
12. Click Submit.

Change Organization Assignments

13. Click Open to proceed to Change Organization Assignments.
    a. Enter Company – State of Nebraska
    b. Enter Cost Center – 65080001 SOS
    c. Continue down the page to complete any other information as needed. The following are required, although not marked with an asterisk.
       i. SBU – S650770000 AS State Office Support
       ii. EDC Group – Complete based on agency where SOS will work.
       iii. Budget Program Number – 065-605 Personnel Division
       iv. Type of Location – Complete based on assignment
14. Click Submit.

Request Compensation

15. Click Open to proceed to Request Default Compensation for Position

16. The Guidelines should populate in.
17. In the Salary section, verify that the Hourly Rate is the Minimum Hire Rate. If necessary, change the amount.
    a. The ONLY two Frequencies we use are Hourly and Annual. We do not use ANY OTHER frequencies.

i. Hourly Plan – use when the Pay Rate Type is Hourly Exempt or Hourly Non-Exempt and ALWAYS use this for Part time positions.
(1) Hourly comp amounts always need to have three decimal places!
ii. Salary Plan – Not used for SOS.

18. Click Approve.

Assign Pay Group

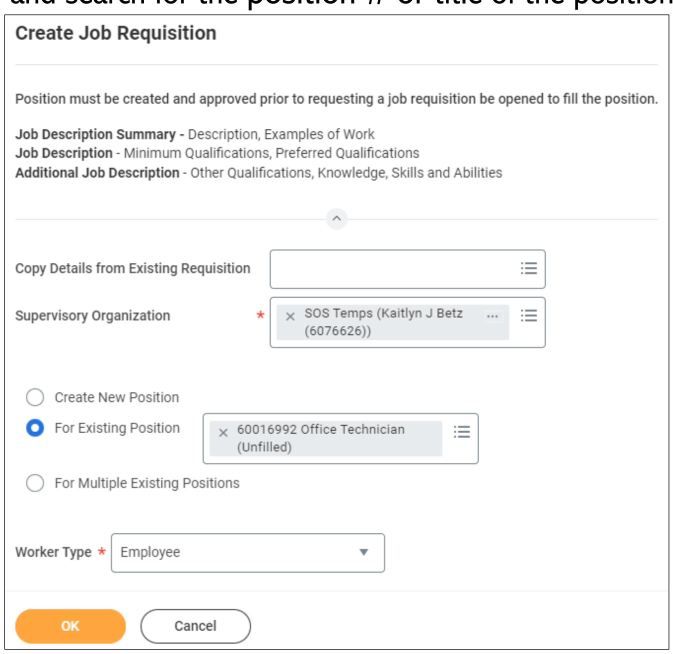
19. Click Open to proceed to Assign Pay Group for Position Restriction.
20. Enter Biweekly-10 day Lag for Proposed Pay Group.
21. Click Submit.

Goes to State Recruiting for Review. Once approved, it will come back to your Workday Inbox

Create Requisition

22. Start the process by accessing the Complete To Do task. Click orange Create Job Requisition button.

23. Update Supervisory Organization to SOS Temps.
24. Select For Existing Position and search for the position # or title of the position just created.



25. Click **OK**.
26. Recruiting Information page will display.

Recruiting Information

Click the **Pencil Icon** to edit the sections you need to edit.

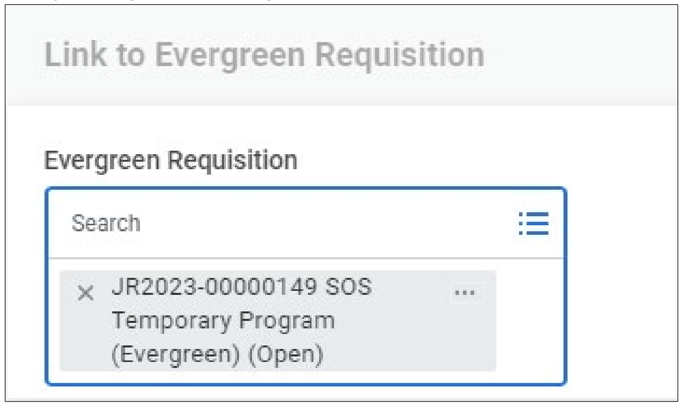
27. Add a **Reason**.
    a. Select Addition > SOS Temp Position.
28. Is this a spotlight job – if yes, check the box. Spotlight a job requisition in Workday means that the job posting will be given more visibility and prominence on the Workday platform.
    a. Use this option sparingly.
29. Click **Recruiting Instructions**.
    a. Post Internal Only (Agency Specific) – Do not select; Not applicable for SOS.
    b. Posting Internally Only (Statewide) – Do not select; Not applicable for SOS.
    c. Posting Not Required.
    d. Post Internally and Externally.
30. Enter in **Recruiting Start Date**, **Target Hire Date** and if needed **Target End Date**.
    a. Recruiting Start Date – when you will start the recruiting process.
        i. You will enter the Posting Start Date and End Date later in this process.
    b. Target Hire Date – when would you like to have this person begin work?
    c. Target End Date – not required.
31. Click **Next**.

Job

Click the **Pencil Icon** to edit the sections you need to edit.

32. Enter **Job Posting Title** – this can be your Working Title and this is what will show in the "advertisement."
33. **Job Profile** will default in from the Position Restrictions.
34. Enter the **Job Description Summary**.
    a. Description, Examples of Work.
35. Enter the **Job Description**.
    a. Minimum Qualifications, Preferred Qualifications.
        i. NOTE: Minimum qualifications MUST match assigned class specification.
36. Enter the **Additional Job Description**.
    a. Other Qualifications, Knowledge, Skills, and Abilities.
37. Worker Sub-Type, Time Type, and Primary Location will default from position restrictions.
    a. The Primary Job Posting Location will update based on the Primary Location selected.
38. If the Job is Part time, enter a Scheduled Weekly Hours value less than 40.

39. Link to Evergreen Requisition.
   a. Select the SOS Temporary Program evergreen.



40. Questionnaires.
   a. Leave both the Internal Posting Questionnaire and the External Posting Questionnaire.
   b. If any additional questionnaires are needed, they need to have been created prior to you starting this process. If that is true, you need to CANCEL this event and start it over.

41. Click **Next**.

Organizations

42. Continuing through the process, click the **Pencil Icon** to edit any of the **Organization Assignments**. These are the Organization Assignments that you have come to know and love. Enter all appropriately.
   a. Enter **Company**.
   b. Enter **Cost Center**.
   c. Continue down the page to complete any other information as needed. The following are required, although not marked with an asterisk.
      i. SBU
      ii. EDC Group
      iii. Budget Program Number
      iv. Type of Location

43. Click **Next**.

Attach any needed documentation.

Track any documentation related to your requisition.

44. Click **Next**.

Review the Summary

You can edit items on the Summary screen, if needed.

45. Click **Submit,** if ready to move forward, or **Save for Later**.

Click Open to proceed to the Request Requisition Compensation

46. The Guidelines should populate in.

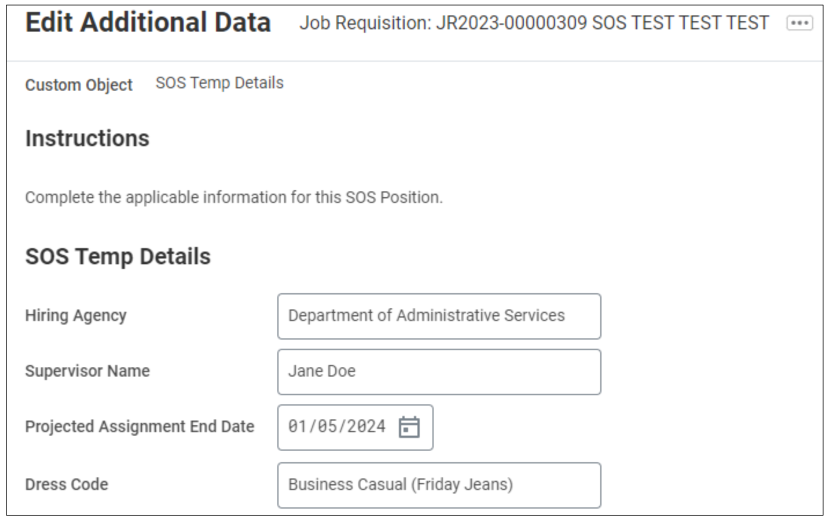
47. In the Salary section, verify that the Hourly Rate is the Minimum Hire Rate. If necessary, change the amount.
   a. The ONLY two Frequencies we use are Hourly and Annual. We do not use ANY OTHER frequencies.

i. Hourly Plan – use when the Pay Rate Type is Hourly Exempt or Hourly Non-Exempt and ALWAYS use this for Part time positions.
(1) Hourly comp amounts always need to have three decimal places!
ii. Salary Plan – Not used for SOS Temporary Positions

48. Click **Submit**.

Click Edit Additional Data

49. Complete all fields:
  a. Hiring Agency – Agency where SOS teammate will be working.
  b. Supervisor Name – Name of assignment supervisor in agency where SOS teammate will be working.
  c. Projected Assignment End Date – Note, can be edited later as needed.
  d. Dress Code – Dress code for SOS teammate occupying position.



50. Click Submit.

Click Open to Configure Supplementary Questionnaires for Job Requisition

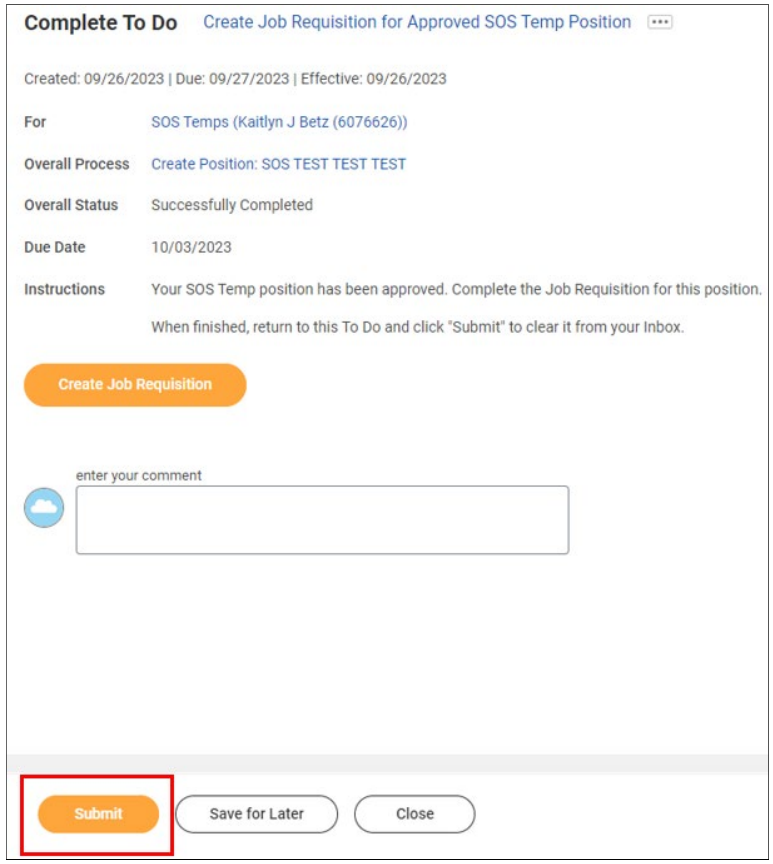
51. You can add other questionnaires.
  a. However, the questionnaire would have had to have been created prior to this process being started.

52. Click Submit.

Success! Event submitted.

Goes to State Recruiting for Action. SOS Recruiter will follow-up with next steps for placement.

53. Return to Inbox and Click Submit on Create Job Requisition To Do.



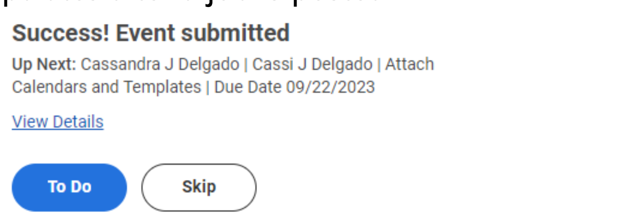
Setting Up Self-Schedule Calendar
The objective of this guide is to set up a recruiting self-schedule calendar.

Security Role
- Recruiter

Contents

Add Calendar to Requisition

1. There are multiple ways to add a calendar to the requisition. Note, calendars must be added to a requisition before candidates apply to the job posting.
   a. Click the To Do that populates after a job is posted.

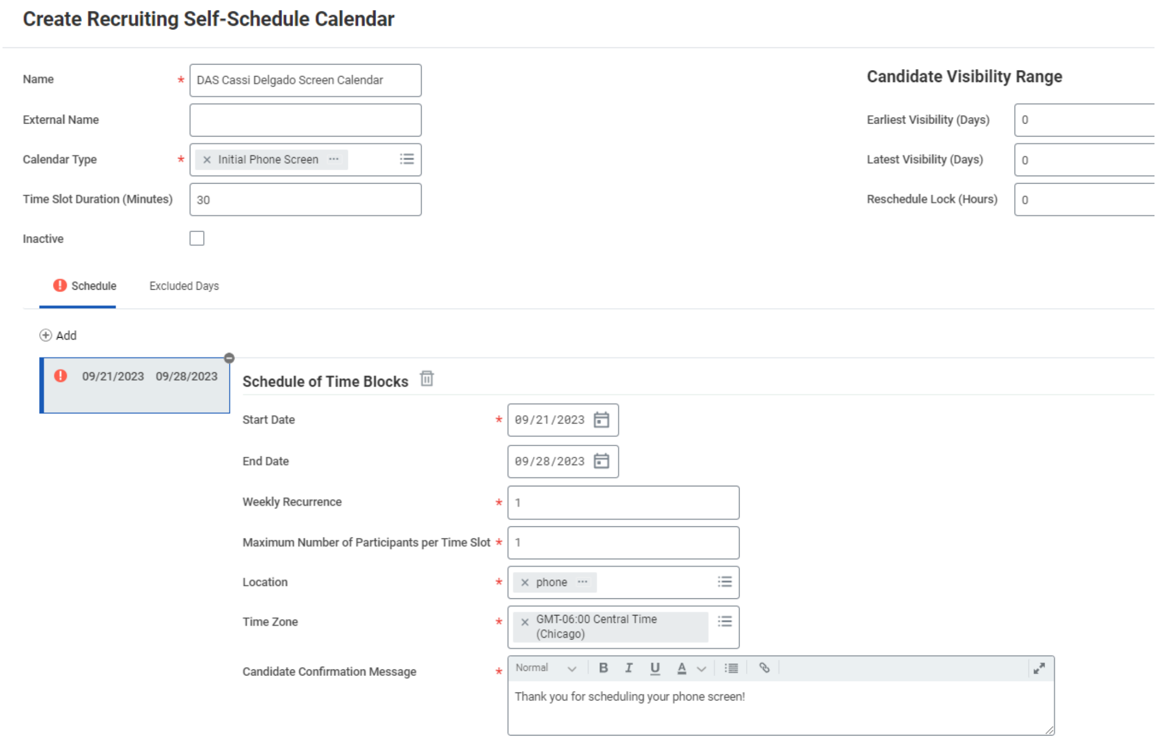


   b. Find the appropriate requisition, click the related actions button. Under Job Change, select Assign Recruiting Self-Schedule Calendars.
2. Select an existing calendar or create a recruiting self-schedule calendar.
3. Click **OK.**

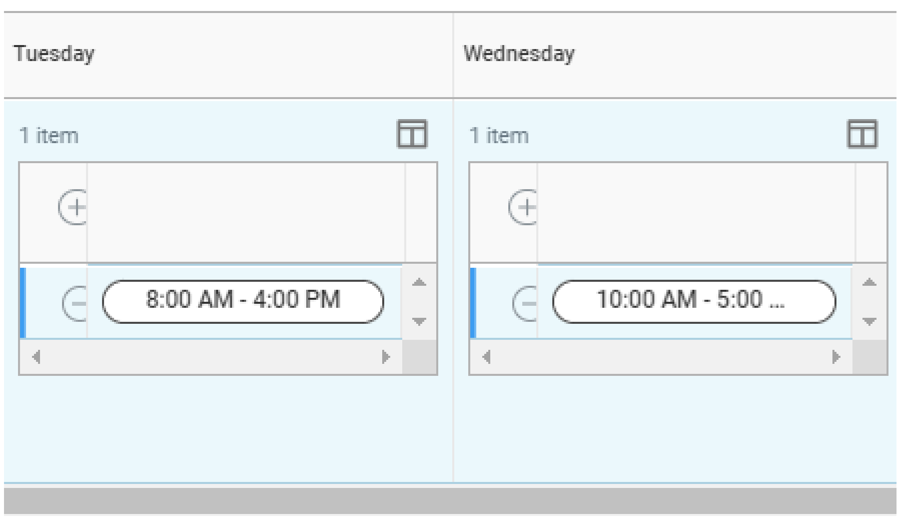
Create Recruiting Self-Schedule Calendar

4. Complete relevant and/or required details.
   a. Calendar should be named with agency name/acronym, recruiter name, and type of calendar (e.g., DAS Jane Doe Interview Calendar).

b. Select calendar type, which will determine which recruiting stage is associated with the calendar.



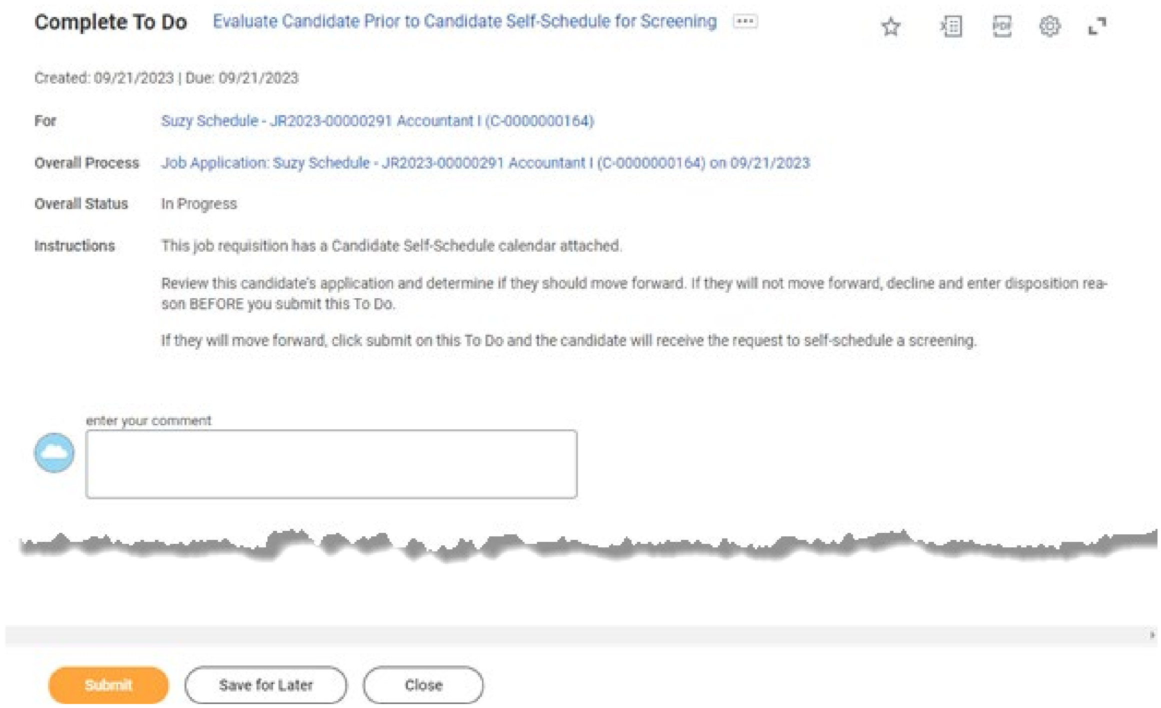
c. Add time blocks that will be available with calendar.



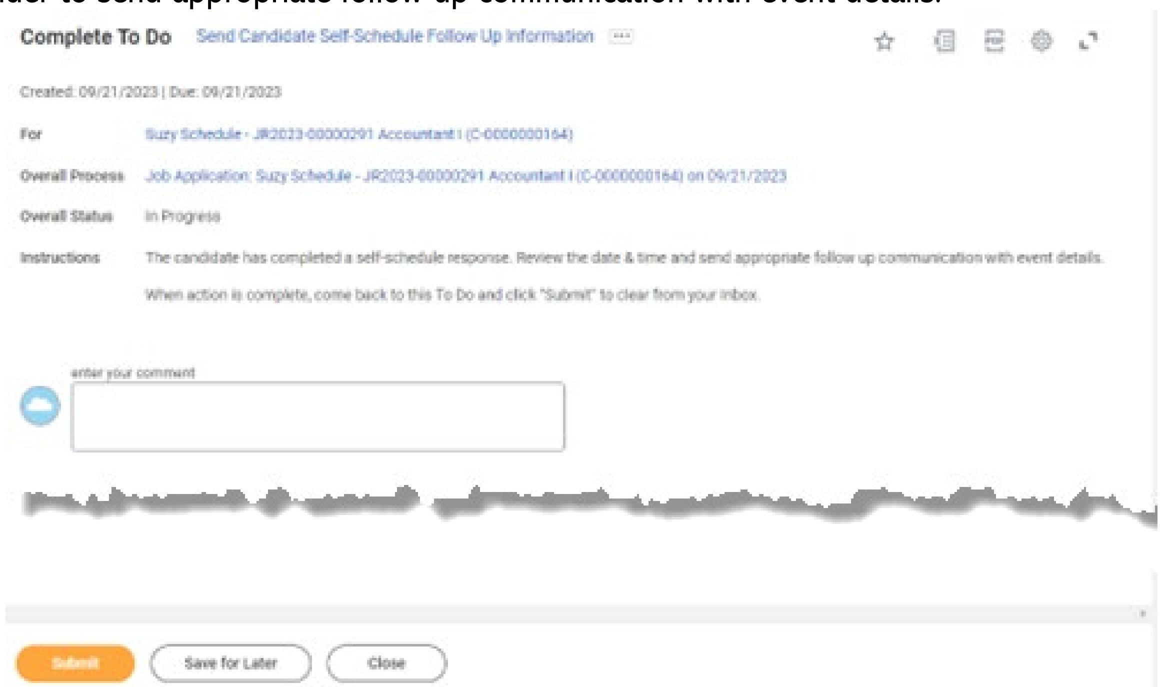
d. Click **Done**

Move Candidates to Self-Schedule Stage

5. Select a Candidate and move to associated recruiting stage in requisition.
   a. Note: candidates go right into the screen step once the State Recruiting MQ review is completed. If a screen self-schedule calendar is added, a To Do will appear in inbox once a candidate passes the MQ review, which allows review of the application prior to the candidate receiving the self-schedule invitation. Once submit is clicked on the To Do, the candidate will receive the self-schedule invitation. If the candidate will not move forward, the application should be dispositioned accordingly prior to clicking submit on the To Do.

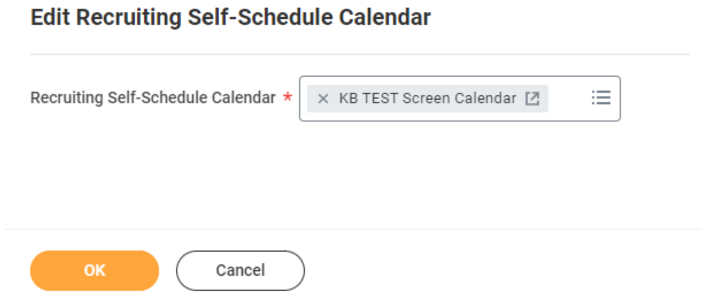


6. Once candidate schedules their appointment, another To Do will populate in Recruiter inbox as a reminder to send appropriate follow-up communication with event details.

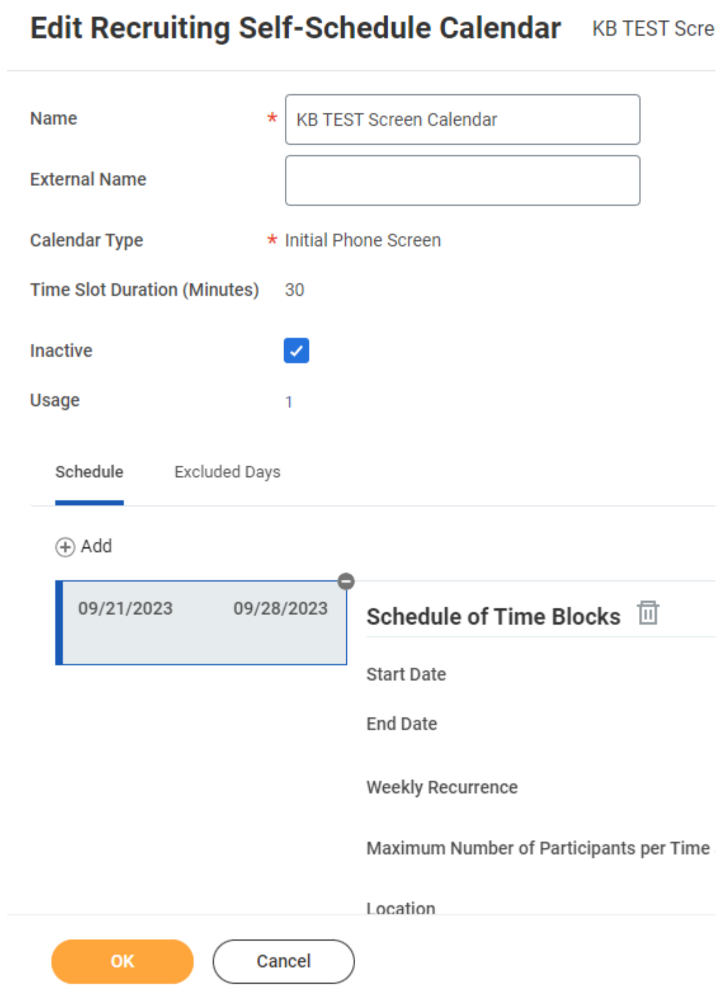


Inactivate Old Self-Schedule Calendars

7. Once a self-schedule calendar is no longer needed, it needs to be inactivated. Type self-schedule into the search bar and click the **Edit Recruiting Self-Schedule Calendar** task.
8. Select the calendar that needs to be inactivated and click OK.



9. Click the box next to Inactive and click OK.



10. Click OK.

Supplemental Questionnaires
The objective of this guide is to create and use supplemental questionnaires on job applications.

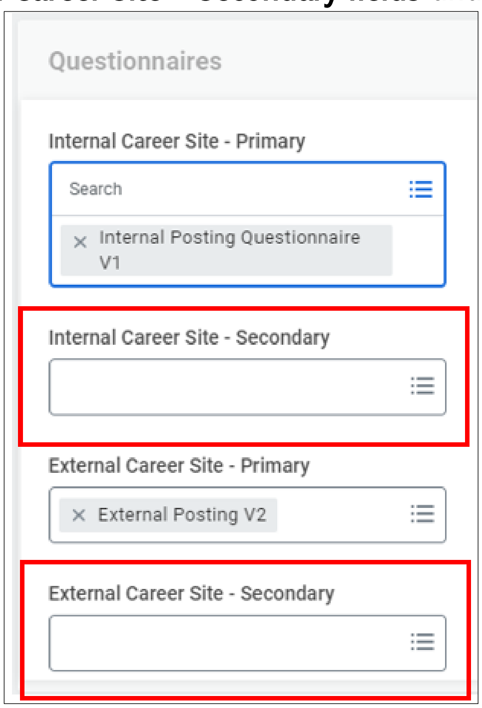
Security Role
- Recruiter

Contents

Request Questionnaire Creation
NOTE: The initial question creation request is submitted outside of Workday.

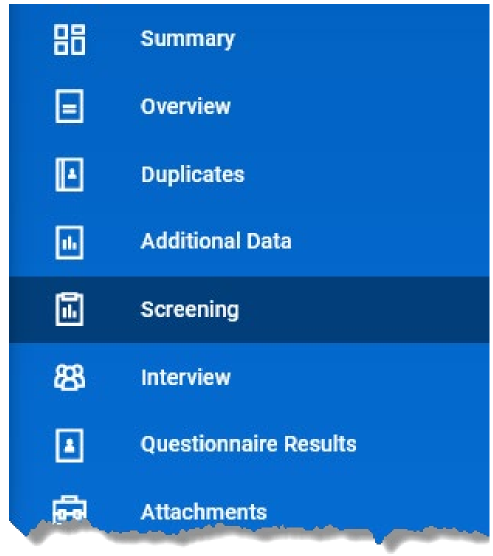
1. Send email to AS.LINKHelp@nebraska.gov with the following information:
    a. Subject: Workday Recruiting: Supplemental Questionnaire Request
    b. Body:
        i. Questionnaire name (must include agency name/acronym to start).
        ii. Position/classification to be posted.
        iii. New questions to be created.
        iv. List of questions to be included in questionnaire.

Attach Supplemental Questionnaire to Requisition
1. In Job portion of the requisition, select the desired questionnaire in both the **Internal Career Site- Secondary** and **External Career Site – Secondary fields** under the Questionnaires section.



2. Continue job requisition process. NOTE: See **Create Requisition Guide** for complete process.

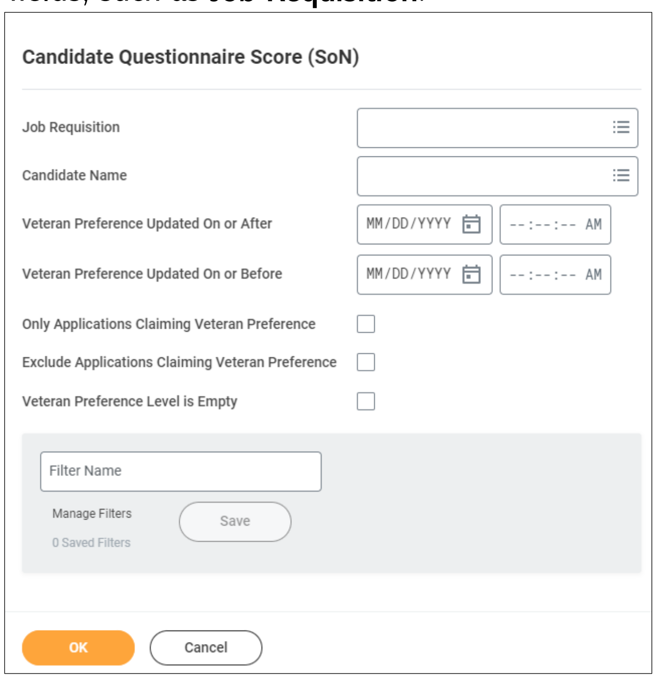
View Questionnaire Results



3. Select a **Candidate**.
4. In the blue section of the candidate profile, select **Screening** to review individual responses to supplemental questions.
5. In the blue section of the candidate profile, select **Questionnaire Results** to see candidate scores.
   a. In **Candidate Questionnaire Score** tab, find the desired requisition in list. Scroll to the right and review Questionnaire Scores under Questionnaire scores.
6. In the blue section of the candidate profile, select **Additional Data** to see veterans' preference. If blank, no veterans' preference has been requested/verified.

Overall Questionnaire Results

7. Type **Candidate Questionnaire Score (SoN)** into search bar and select that report.
8. Complete applicable fields, such as **Job Requisition**.



9. Click **OK**.
10. Review results in Workday, or export to Excel by clicking the Excel icon in right-hand corner above the report results.

Candidates' scores appear in **Candidate Score** column. NOTE: Verified veterans' preference is calculated as part of candidates' scores.