Workday Candidate Management

Training for Recruiters & Managers

MC
MONTGOMERY COLLEGE

Training Guidelines

- This session is recorded and will be available on Workday Learning

- Close your Email, logout of IM, and turn cell phones off or put them away

- This session includes demonstrations in a training environment and information has been staged so that no personal or sensitive data is shown

- If you have a question…
    - For questions about Workday, please type in the chat
    - For questions about Montgomery College processes, policies, and expectations, please use the form link provided to add questions during the training, submit the form when you are done

Your Instructors
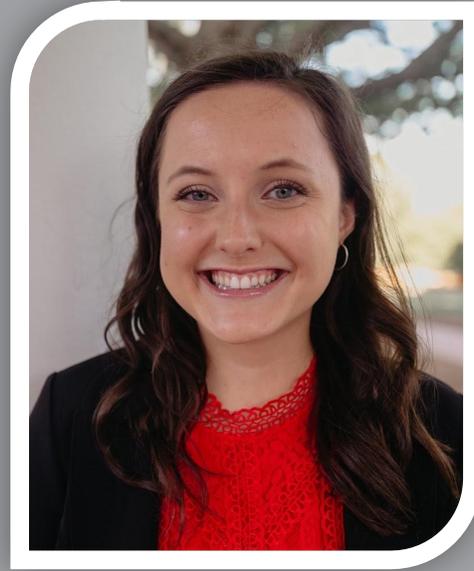
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Tampa, FL

Agenda

- Introductions & Objectives
- Project Overview & Changes
- Recruiting Overview
- Candidate Management for
  - Staff
  - FT Faculty
  - PT Faculty
  - Regular PT Faculty
  - Casual Temp
- Support Resources

- Review important dates and key changes

- Understand Candidate Management tasks within Workday

- View demonstrations of Candidate Management steps

- Know where to locate resources and support

Support Resources

On-Demand Help

Project Webpage:
FAQs
Job Aids & Reference Guides
Videos
Training Recordings During 2021

Workday Learns on 1/3/22:
Training Recordings

Training Recording Questions

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itservicedesk@montgomerycollege.edu

HRSTM
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hrstm@montgomerycollege.edu

OBS Finance
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procure@montgomerycollege.edu
finance.obs@montgomerycollege.edu

Workday Help

IT Service Desk
240-567-7222
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Project Website

- Houses all project information, communications, FAQs and Training Materials

Workday

The College's use of Workday will enable us to improve administrative processes by using modern financial management, human resource, and professional development systems to support the College's mission and goals. It is designed to be mobile device friendly, helping our faculty and staff complete their business faster and get back to what's really important, our students.

PROJECT PHASES

Completed and upcoming phases of the project

[WORKDAY PROJECT PHASES]

TIMELINE

Where are we now?

[WORKDAY PROJECT TIMELINE]

TRAINING

Access live and recorded webinars, job aides, and the training schedule

[WORKDAY TRAINING]

WORKDAY COMMUNICATIONS

Archive of collegewide communications

[WORKDAY COMMUNICATIONS]

FREQUENTLY ASKED QUESTIONS

Review FAQs about Workday

[WORKDAY FAQS]

Sponsor Message

Sherwin Collette
SVP for Administrative and Fiscal Services
Workday Executive Sponsor

Welcome to Your Workday Training!

We are closing in on the final milestone of the Workday project! In January 2022, Workday becomes our official Human Resources and Financial Management system.

By taking today's training, you will be one step closer to full self-service functionality that provides the ability to access and manage your personal HR and finance-related information. As an integral part of our institutional success, we thank you for your participation. We are confident it will ensure your personal success and allow you to take full advantage of all that Workday has to offer.

Enjoy your training session and have a good Workday!

Vision

MC's Mission, Vision, Values

MISSION STATEMENT

We empower our students to change their lives and we enrich the life of our community. We are accountable for our results.

VISION STATEMENT

With a sense of urgency for the future, Montgomery College will be a national model of educational excellence, opportunity, and student success. Our organization will be characterized by agility and relevance as it meets the dynamic challenges facing our students and community.

CORE VALUES

EXCELLENCE * INTEGRITY * INNOVATION * DIVERSITY * STEWARDSHIP * SUSTAINABILITY
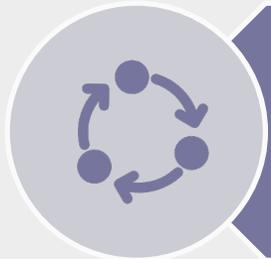
(Adopted by the Board of Trustees on June 20, 2011.)

Benefits for Montgomery College

One system that integrates with many other systems and reduces time to perform work

Access and update your own data using applications

View statuses of initiated tasks and get **notified** on completed tasks

Initiate actions using search or applications and complete tasks from your Workday Inbox

Quickly search for and **find information** such as organizational charts and your personal information

(Optional) **Mobile device** access to manage information, anytime, anywhere

Workday Project Overview

- Workday is the system of record for all Human Resources, Finance, and Payroll data and processes as of January 1, 2022, and all users begin access on **January 3, 2022**

Currently

Managed outside of Workday:
- Until 12/24
  - Payroll
  - Time Tracking and Leave
- Until 12/31
  - EAP
  - Most financial processes

Workday

Live in Workday 1/3/2022:
- Payroll
- All Tracking for Time Entry, Time Off, and Leave
- EAP
- Financial Accounting
- Budget (excluding Adaptive Planning)
- Procurement
- Expenses
- Projects/Capital
- Business Assets
- Banking & Settlement
- Grants Management & Contracts
- Supplier Accounts

Already in Workday:
- Recruiting
- Compensation
- HCM
- Benefits
- Learning
- Talent & Performance

Important: Pay Periods

When is the last pay period in Banner?	When is the first pay period in Workday?	When do non-exempt employees start entering time in Workday?
• December 11-24, 2021	• December 25, 2021- January 7, 2022	• Log into Workday on January 3, 2022 • Enter time from December 25, 2021-January 7, 2022 • **Enter, submit, and approved by 12:00 pm on January 7, 2022**

Important: Time must be entered and submitted by the deadline in order to get paid

Important Dates

Departments processing pay for WDCE Instructors and Part-time Faculty between December 25 – January 7 for the January 14 pay date please contact HRSTM

Date(s)	Action
November 27, 2021	Workday locked-down while project team completes system preparation
January 3, 2022	Workday open again for all users and is the system of record for HR, Finance, and Payroll **Enter time, time off, and leaves**
December 25, 2021 through January 7, 2022	First pay period in Workday
January 7, 2022	**First Time Sheets due 12:00 pm in Workday**
January 8-21, 2022	First full pay period in Workday *Payslip visible 2 days before pay day

For questions, contact HRSTM at hrstm@montgomerycollege.edu

Recruiting Overview

High-Level Process Flow

Job Requisition is created and posted ➔ Candidates apply ➔ Recruiter/Hiring Manager move candidates through the job application stages (or decline) ➔ Candidates receive and accept offer ➔

Background Check ➔ Hire process initiates ➔ Candidate completes new hire paperwork thru WD onboarding (I-9 completed in person)

Job Requisitions Overview

Part-Time Faculty

- Requisitions are created by Department Chairs & WDCE
- Refer to the *Creating a PT Faculty Job Requisition* job aid

Position Management

- Requisitions must be created by HRSTM
- If a Manager tries to create a PM requisition, they receive an error

Casual Temps

- Requisitions are created by Managers
- Approval process after Manager's submission:
  - First, Manager's Manager
  - Then, Budget
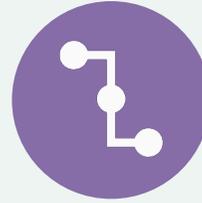- Refer to the *Creating a Casual Temp Job Requisition* job aid

Workday Demo

- Recruiting Application

Candidate Management Overview

High-Level Process Overview

Candidates Apply
- External and internal candidates submit a job application

Candidate Management
- Recruiters and Hiring Managers complete various steps and disposition candidates
- Steps vary by employee type

Hire
- Candidate is moved to the hire process
- Candidate becomes a new hire

Overview of Key Changes

Currently	Workday Starting 1/3/2022
Managers have limited candidate management responsibilities in Workday.	Managers have increased candidate management responsibilities (e.g., can move and decline candidates in certain stages).
Supporting documents are emailed to the recruiter.	Supporting documents are uploaded in Workday.
Reference check is a manual process.	Reference check for external candidates is processed in Workday.
Onboarding new hires using Dropbox.	Onboarding new hires using Workday. Managers should not send new employees to HR to complete paperwork; it will be all be done in the system. I-9 verification will still be required in person.
Background check is completed through recruitment and records depending on the employee type.	Background check is completed through Recruitment.

Manager Roles

Stage			
Screen	Interview	Reference Check	Recommended Hire
Potential Manager Steps in Workday: Manager Reviews Candidate *Then either:* Declines **OR** Moves Forward to: • Search Committee Review • Assessment • Interview	Manager Interviews Candidate *Then either:* Declines **OR** Moves Forward to: • Recommended Hire • Requests Candidate References	Manager Reviews (External) Candidate References *Then either:* Declines **OR** Moves Forward to Recommended Hire	Depending on the job profile, you may receive one of the following tasks: • Complete Rank & Salary Forms (FTF) • Complete Rank Form (PTF) • Complete Recommended Hire Questionnaire (Regular PTF) • Complete Recruitment Selection Report (Staff, Administrator, Regular PTF, FTF)

Dispositioning Candidates

Disposition (Decline)

- Select a Reason

- Reasons may vary depending on the candidate's stage

- Can decline a candidate until Ready for Hire status
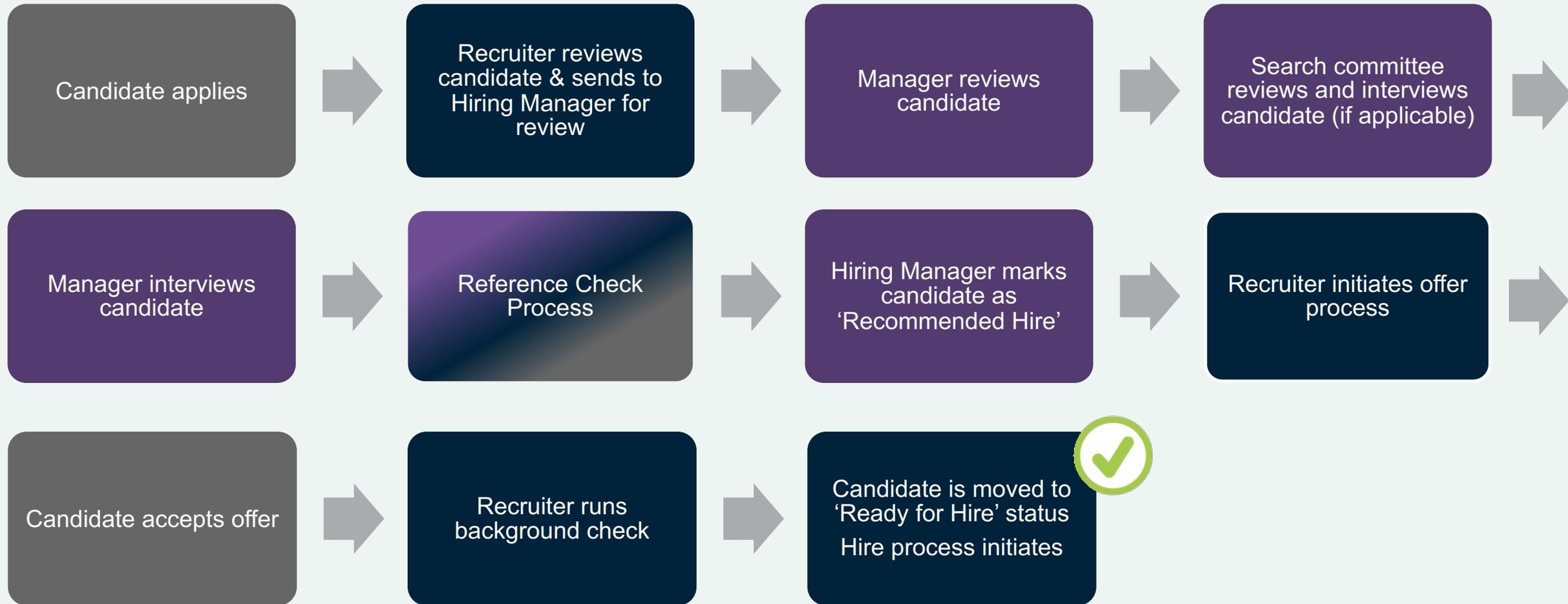
Manager Can Disposition…

…in the Review, Screen, Assessment, & Reference Check stages

- Contact your Recruiter if you wish to Decline in other stages

Recruiter can Disposition…

…in the Interview, Offer, & Background Check stages

- & Review, Screen, Assessment, and Reference Check

Example External Staff Hire

Candidate applies → Recruiter reviews candidate & sends to Hiring Manager for review → Manager reviews candidate → Search committee reviews and interviews candidate (if applicable) →

Manager interviews candidate → Reference Check Process → Hiring Manager marks candidate as 'Recommended Hire' → Recruiter initiates offer process →

Candidate accepts offer → Recruiter runs background check → Candidate is moved to 'Ready for Hire' status

Hire process initiates ✓

Workday Inbox

- Tasks requiring your action

- You must check your Workday Inbox to complete assigned action items in the candidate management process

Inbox

Actions	Archive

Sort By: **Newest**

From Last 30 Days

13 day(s) ago - Successfully Completed

Reference Check for Job Application: Mark Morrison - R2755 Instructional Faculty FT (CA28176)
14 day(s) ago - In Progress: Edesa Ashourian

Interview: Mark Morrison - R2755 Instructional Faculty FT (CA28176)
14 day(s) ago - Successfully Completed

Supplier Request: Test 2.817 on 08/17/2021
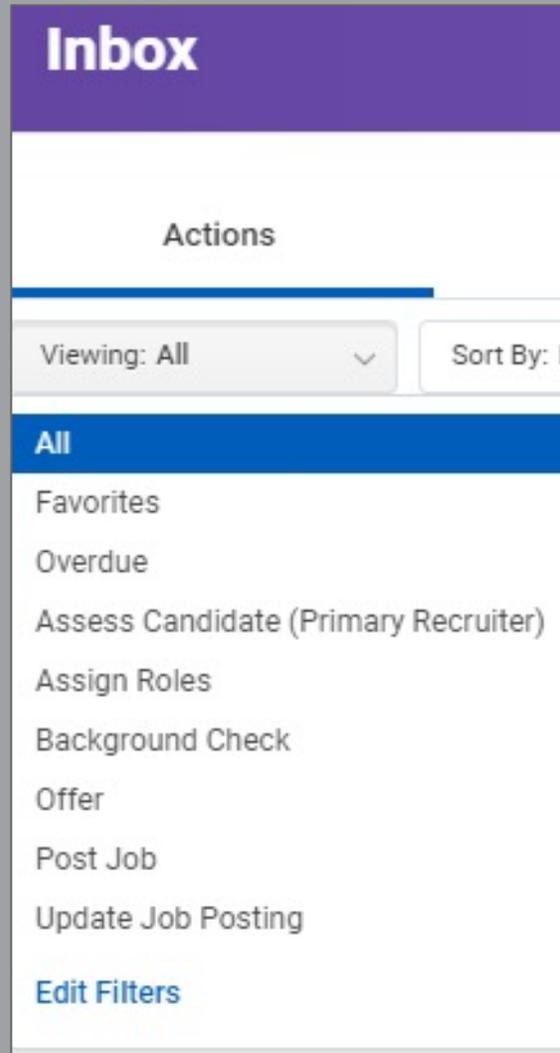21 day(s) ago - Successfully Completed

View Event

Interview: Mark Morrison - F

14 day(s) ago - Successfully Complet

For	Mark Morriso
Overall Process	Job Applicat
Overall Status	In Progress

Details	Process

Candidate	Mark Morrison

Workday Inbox

- Filter Inbox to locate Recruiting tasks

Recruiter Inbox Filters
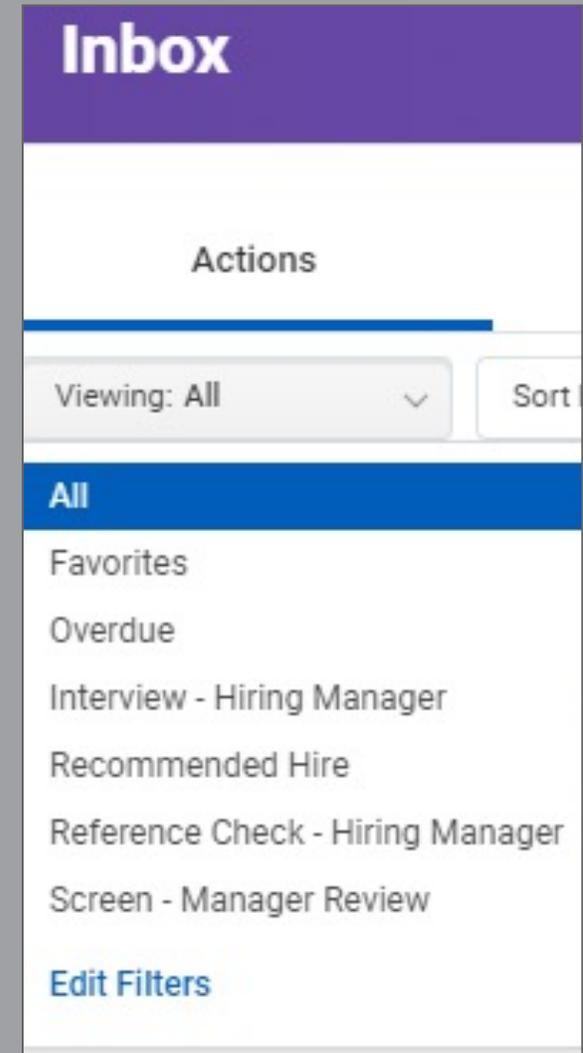
Manager Inbox Filters

*Search Committee Members have an additional filter

Candidate Management for Staff

What *could* the manager do in each stage?

Staff Hire (External)

Stage			
Screen	**Interview**	**Reference Check**	**Recommended Hire**
Manager Reviews Candidate *Then either:* Declines **OR** Moves Forward to: • Search Committee Review • Assessment • Interview	Manager Interviews Candidate *Then either:* Declines **OR** Moves Forward to: • Recommended Hire • Requests Candidate References	Manager Reviews (External) Candidate References *Then either:* Declines **OR** Moves Forward to Recommended Hire	Manager completes and uploads RSR (Recruitment Selection Report) for the candidate

(Row label: Potential Manager Steps in Workday)

What *could* a manager do in each stage?

Staff Hire (External)

Stage			
Screen	Interview	Reference Check	Recommended Hire

	Screen	Interview	Reference Check	Recommended Hire
Potential Manager Steps in Workday				

Workday Demo

- Candidate Management for Staff

Candidate Management for Full Time Faculty

What *could* a manager do in each stage?

Stage			
Screen	**Interview**	**Reference Check**	**Recommended Hire**
Potential Manager Steps in Workday → Manager Reviews Candidate *Then either:* Declines **OR** Moves Forward to: • Search Committee Review • Assessment • Interview	Manager Interviews Candidate *Then either:* Declines **OR** Moves Forward to: • Recommended Hire • Requests Candidate References	Manager Reviews (External) Candidate References *Then either:* Declines **OR** Moves Forward to Recommended Hire	Manager completes and uploads Rank & Salary Forms for the Candidate Manager completes and uploads RSR (Recruitment Selection Report) for the candidate

What *could* a manager do in each stage?

Full-Time Faculty (External)

Stage			
Screen	Interview	Reference Check	Recommended Hire

Potential Manager Steps in Workday

Workday Demo

- Candidate Management for Full Time Faculty

Candidate Management for Part Time Faculty

What *could* a manager do in each stage?

	Stage		
	Screen	Interview	Recommended Hire
Potential Manager Steps in Workday	Manager Reviews Candidate *Then either:* Declines **OR** Moves Forward to: • Search Committee Review • Assessment • Interview	Manager Interviews Candidate *Then either:* Declines **OR** Moves Forward to: • Recommended Hire	Manager completes and uploads Rank Form for the Candidate

What *could* a manager do in each stage?

Part-Time Faculty (External)

Stage		
Screen	Interview	Recommended Hire

Potential Manager Steps in Workday

Workday Demo

- Candidate Management for Part Time Faculty

Candidate Management for Regular Part Time Faculty

What *could* a manager do in each stage?

Stage		
Screen	**Interview**	**Recommended Hire**
Potential Manager Steps in Workday — Manager Reviews Candidate *Then either:* Declines **OR** Moves Forward to: • Search Committee Review • Assessment • Interview	Manager Interviews Candidate *Then either:* Declines **OR** Moves Forward to: • Recommended Hire	Manager completes Regular Part-Time Faculty Recommended Hire questionnaire for the Candidate Manager completes RSR (Recruitment Selection Report) for the candidate

What *could* a manager do in each stage?

Stage		
Screen	Interview	Recommended Hire
Potential Manager Steps in Workday		

Workday Demo

- Candidate Management for Regular Part Time Faculty

Candidate Management for Casual Temp

What *could* the manager do in each stage?

Casual Temp (External)

Stage		
Screen	**Interview**	**Reference Check**
Manager Reviews Candidate *Then either:* Declines **OR** Moves Forward to: • Search Committee Review • Assessment • Interview	Manager Interviews Candidate *Then either:* Declines **OR** Moves Forward to: • Recommended Hire • Requests Candidate References	Manager Reviews (External) Candidate References *Then either:* Declines **OR** Moves Forward to Recommended Hire

(Row label at left: Potential Manager Steps in Workday)

What *could* the manager do in each stage?

Casual Temp (External)

Stage		
Screen	Interview	Reference Check

Potential Manager Steps in Workday

Workday Demo

- Candidate Management for Casual Temp

Recap

Top 3 Takeaways…

1. Managers will have more responsibility to move candidates through initial recruitment stages including declining candidates.

2. Initial Rank for Part-time faculty hires must be submitted through Workday before the Recruiter can initiate an offer.

3. Reference check for external candidates will be done through Workday.

January 3, 2022

- Access Workday
- (Non-Exempt Employees) Enter time for the pay period of 12/25/21-1/7/22; **submit time and approve by 1/7/2022 at 12:00 EST**
- Enter time off or leave requests for 12/25/21 and beyond
- Ensure your address, personal information, and emergency contacts are up-to-date
- Review 2022 Benefit elections for accuracy
- Review Direct Deposit and Payment Elections
- Review Tax Elections

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Other Training Sessions

Important:

On-demand recordings will be available on the project website following each live session

Starting 1/3/22, all sessions and recordings will be in Workday Learning

Session	Audience	2021	2022
Workday Core Concepts	Employees	**Nov 10** 2:00-3:00	**Jan 18** 3:00-4:00
Manager Self-Service Overview	Managers	**Nov 30** 2:00-4:00	**Jan 19** 12:00-2:00
Period Activity Pay	Academic Aides WDCE Partner	**Nov 15** 2:00-4:00	**Jan 20** 2:00-4:00
Employee Self-Service for Procurement & EAP Requisitions	Employees	**Dec 2** 10:00-12:00	**Jan 25** 2:00-4:00
Overview for Cost Center Managers (CCM) & Secondary Cost Center Managers (SCCM)	CCM and SCCM	**Dec 6** 2:00-3:00	**Jan 26** 1:00-2:00
Grants Overview for Principal Investigators	Principal Investigators	**Dec 7** 2:00-3:00	**Jan 27** 2:00-3:00

Thank You

Enjoy your Workday!

**Time for
a 5-Minute
Break**