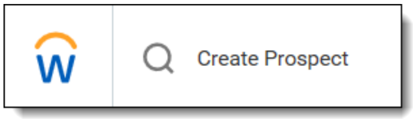
Prospect & Application, create

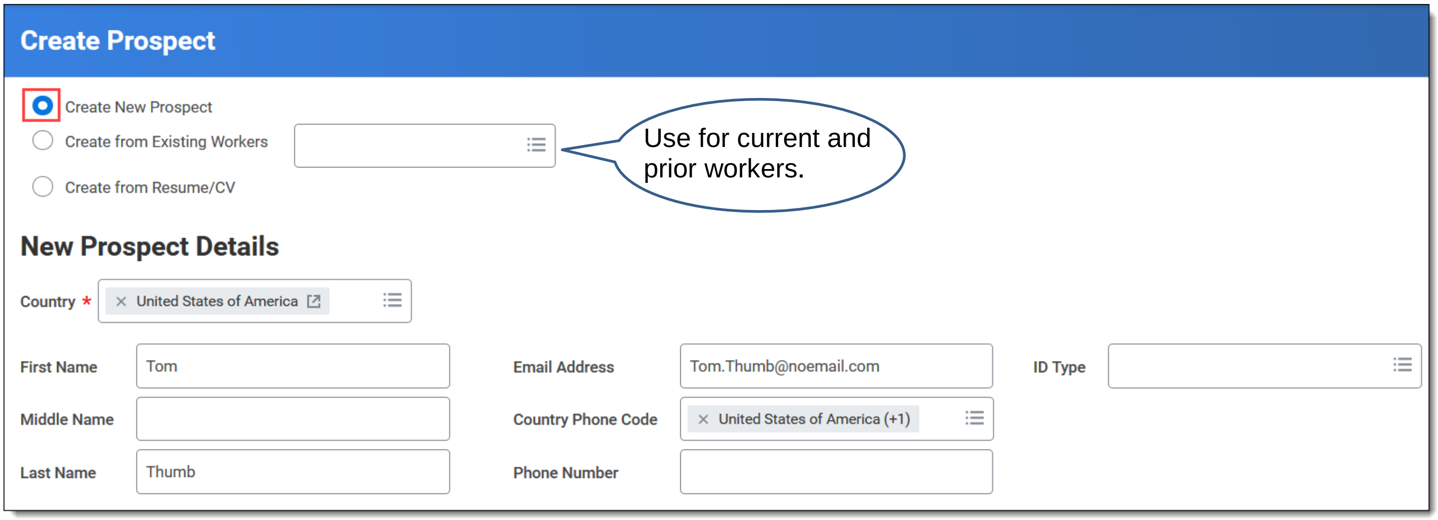
This job aid provides step by step instructions on how to Create a Prospect for a requisition. This example demonstrates how you would complete the task for an external candidate; however, it can be completed for an internal candidate as well.

Step 1: In the search bar type **Create Prospect,** and select it from the *Search Results*.

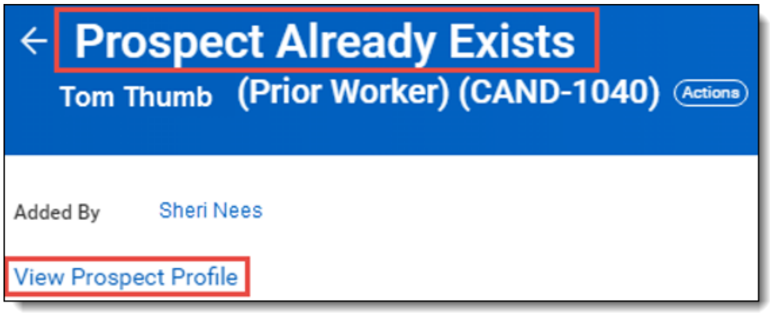


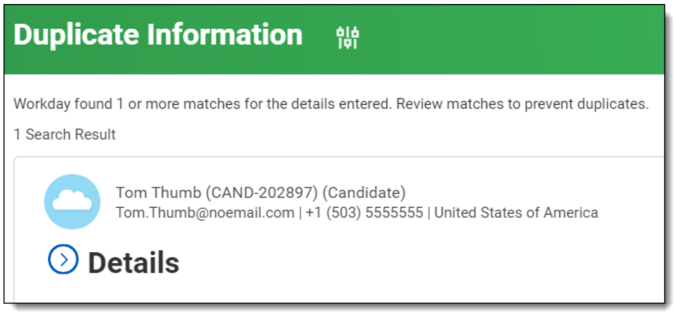
Step 2: On the Create Prospects screen, select how you will be adding the prospect. For this example, we will select **Create New Prospect** and enter **New Prospect Details.** Click **OK.**

Contingent Workers (CW) are not state employees and should be treated as external candidates. Do not created a Prospect record from their existing contingent worker profiles. Use *Create New Prospect*.

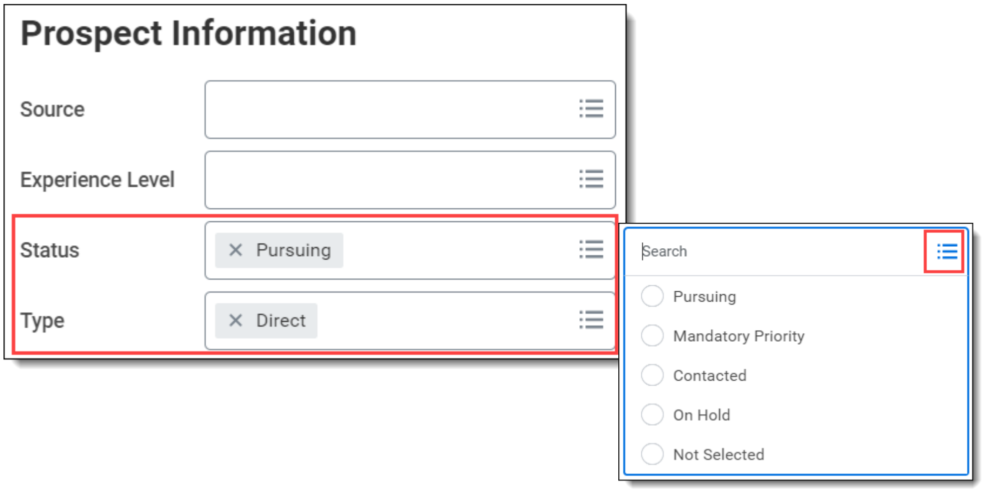


Step 3: If the candidate has already been entered as a prospect, the top of the screen will display **Prospect Already Exists** or **Duplicate Information**. Review *Prospect Profile* and *Details* information to verify candidate identity. Click on **View Prospect Profile** or enter the candidate number in the search bar to navigate to the candidate record and resume at Step 5 to start the *Create Application* process.

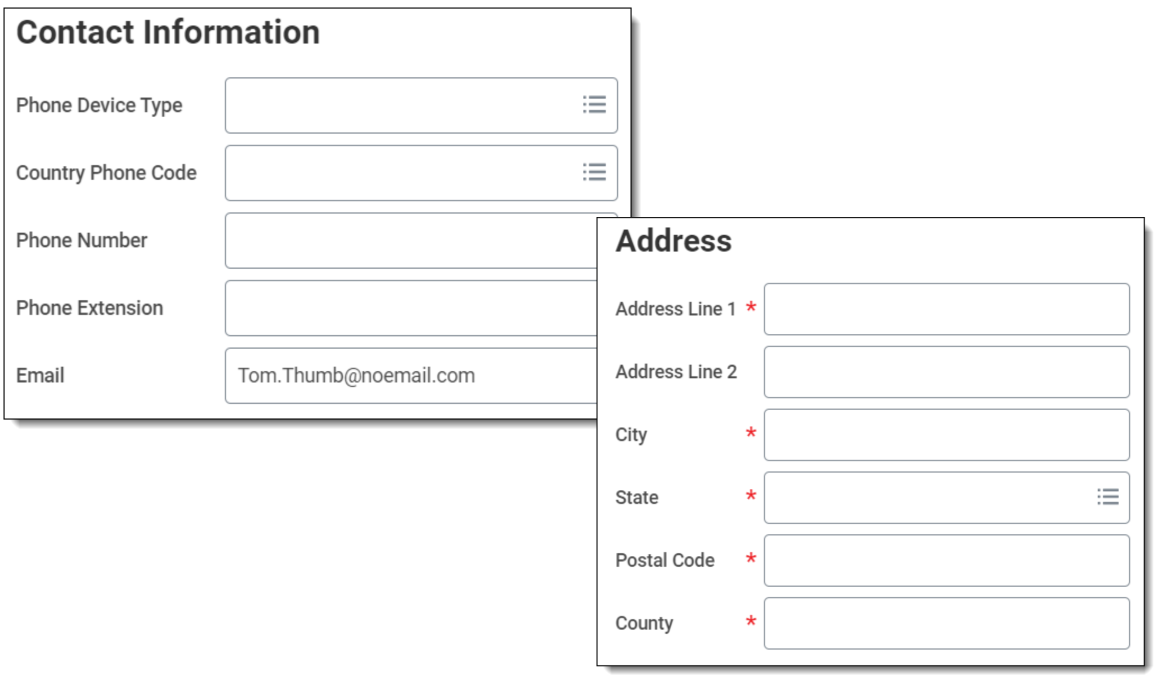




Step 4: If the candidate has not been entered as a prospect, the system will prompt you to **Create Prospect**. The **Status** will default to *Pursuing,* but can be changed by using the menu prompt. The **Type** field automatically defaults to *Direct*, but can also be changed.



Enter **Contact Information**.

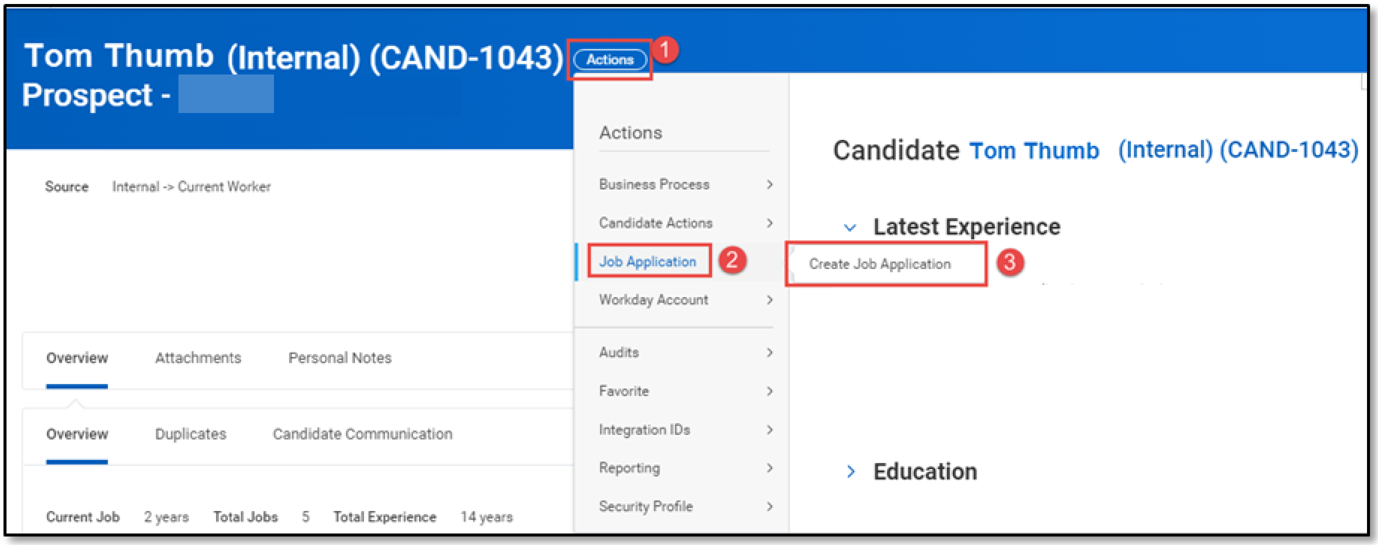


Click on the tabs to add **Experience**, **Resume / Cover Letter** and **Other Documents**.

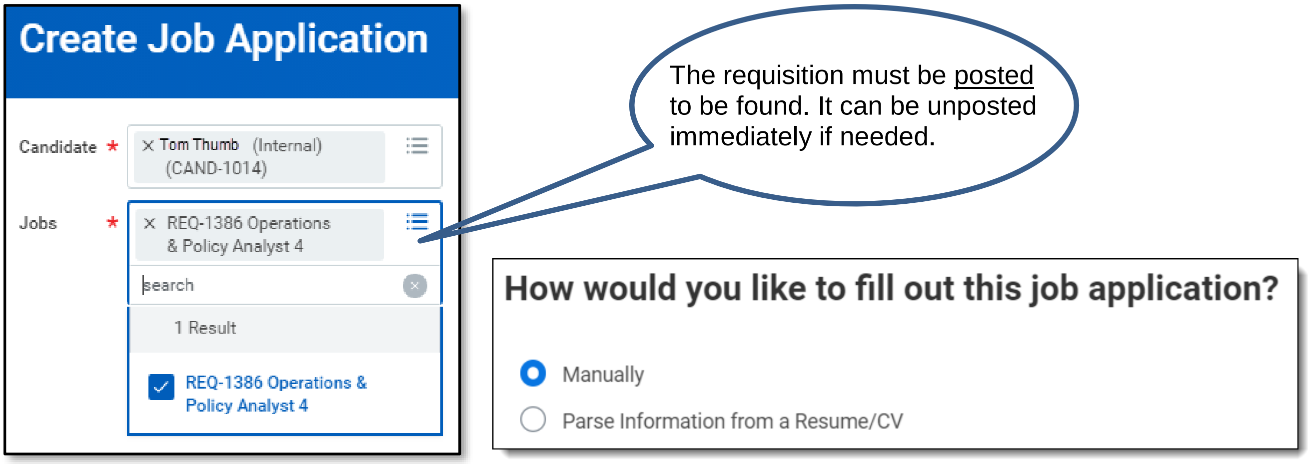
Click **OK**. The *Create Prospect* task is now complete.

Continue to Step 5 to Create an Application for the prospect you just created.

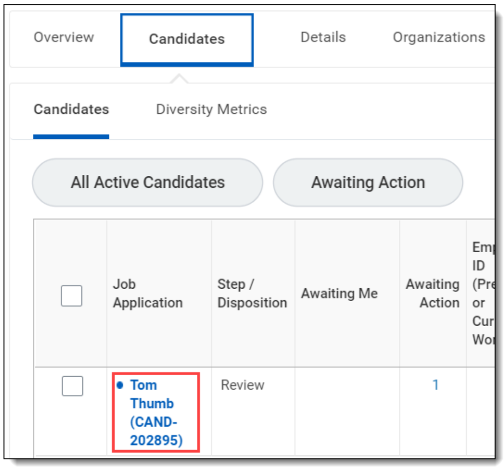
Step 5: Click on **Actions** (1), hover over **Job Application** (2), and select **Create Job Application** (3).



Step 6: The **Candidate** name will default. In the **Jobs** field type in the job requisition number you are creating the application for and hit enter. Select **Manually** or **Parse Information from a Resume/CV** for *How would you like to fill out this job application?* Click **OK**.



Step 7: Enter or update information on the **Create Job Application** screen if you'd like. Click **OK**. The application for the candidate has been created and will show on the Candidate Grid.



Step 8: Go back to the requisition and click on the **Candidates** tab. The candidate is at the Recruiter Review step.

Step 9: To review details of the candidate's application, click on the candidate's name. To review additional information, you can click the appropriate tabs and sub-tabs, as available.