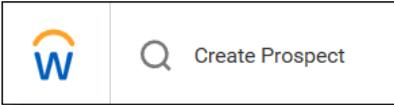


### Prospect & Application, create

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 create a Prospect record from their existing contingent worker profiles. Use *Create New Prospect*.

#### Create Prospect

Create New Prospect

Create from Existing Workers

Create from Resume/CV

Use for current and prior workers.

#### New Prospect Details

Country \* x United States of America

First Name <input type="text" value="Tom"/>	Email Address <input type="text" value="Tom.Thumb@noemail.com"/>	ID Type <input type="text"/>
Middle Name <input type="text"/>	Country Phone Code <span style="border: 1px solid gray; padding: 2px;">x United States of America (+1)</span>	
Last Name <input type="text" value="Thumb"/>	Phone Number <input type="text"/>	

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.

←

## Prospect Already Exists

Tom Thumb (Prior Worker) (CAND-1040) Actions

Added By Sheri Nees

View Prospect Profile

## Duplicate Information

Workday found 1 or more matches for the details entered. Review matches to prevent duplicates.

1 Search Result

Tom Thumb (CAND-202897) (Candidate)

Tom.Thumb@noemail.com | +1 (503) 5555555 | United States of America

➔ **Details**

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.

### Prospect Information

Source

Experience Level

Status X Pursuing ⋮

Type X Direct ⋮

Search ⋮

Pursuing

Mandatory Priority

Contacted

On Hold

Not Selected

Enter **Contact Information**.

### Contact Information

Phone Device Type

Country Phone Code

Phone Number

Phone Extension

Email

### Address

Address Line 1 \*

Address Line 2

City \*

State \*

Postal Code \*

County \*

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

Experience

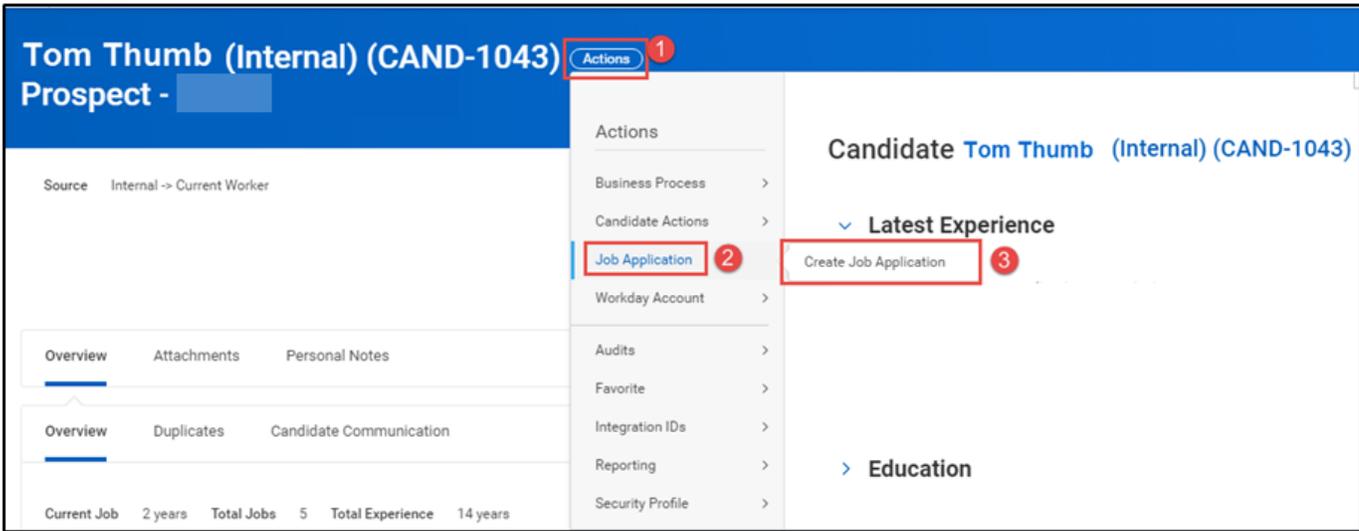
Resume / Cover Letter

Other Documents

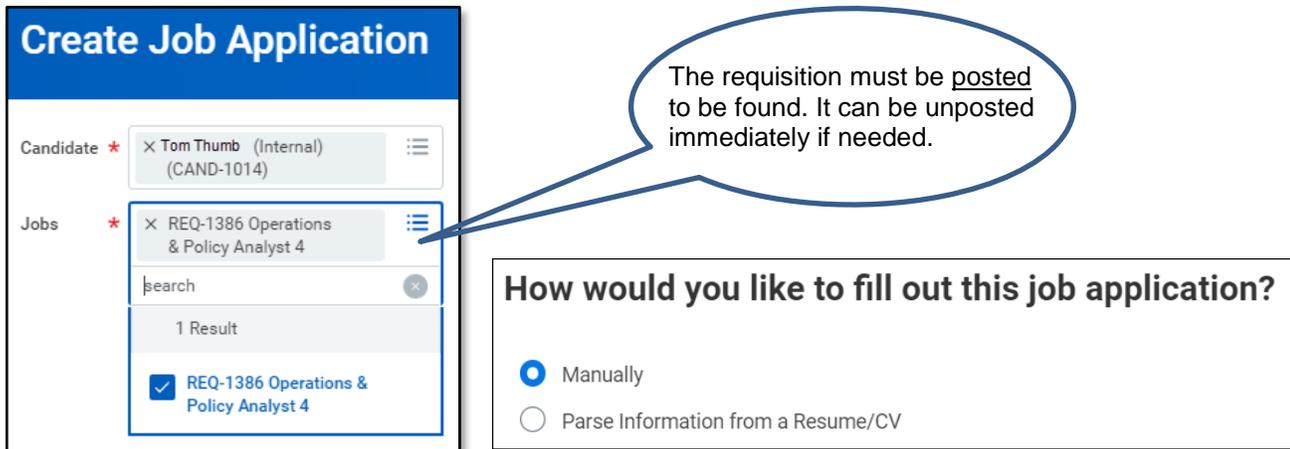
Click **OK**. The *Create Prospect* task is now complete.

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.

