

# Taleo Candidate Selection Workflow Understanding Step, Status, and Reasons

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Staff Process

## **What is a Candidate Selection Workflow (CSW)?**

Candidate Selection Workflow is a stepped methodology where applicants to a job are selected as a candidate and proceed through the various steps towards being hired for the position, or for disposition of candidates who are no longer being considered. The process of moving a candidate through the Workflow is defined by the Workflow Steps and the candidate's Status at each Step. This is the point where either a candidate is moved forward to the next Step, or it is determined that they will not be selected and the reason why.

### **Understanding Step, Status and Reason**

#### **Step:**

A candidate's progression within the Workflow is identified by its current Step. Candidate Status starts at the first Status level in each Step. Their Status is changed based on what actions are taken with the candidate while they are in this Step. There is a built-in hierarchy of available Status with each Step.

#### **Status:**

The Status of a candidate reflects the detail of where they are currently within the Step. There is a defined hierarchy of Status within each Step. Movement through the available Status is caused by completing Status requirements, which causes a move to the next Status, until the completion Status is reached (Completion Statuses are marked by an "\*" in the Status drop down menu). Once the completion Status has been reached, the Candidate moves to the next Step, or is Not Selected or Candidate Withdrew.

Candidates can be determined Not Selected or Candidate Withdrew at any time during any Step or Status. When a candidate is identified as Not Selected or chooses to withdraw, disposition of the candidate should take place. The step would stay the same, the Status would be changed to Not Selected or Candidate Withdrew. This way, the candidate history is retained and can be easily viewed for future candidate searches.

## Taleo Candidate Selection Workflow

The “Candidate Selection Workflow” (CSW) represents the process for managing candidates within a requisition. “Steps” represent the various steps in the hiring process. “Statuses” reflect the current status of a candidate within each step. In order for someone to move to the next step in the CSW, they must first be placed into the “Completion Status” for that step.

Step	Step Name	Initial Status/Default	Intermediate Status (Optional)	Completion Status ✓	Non-Selection Statuses ⓧ
1	<b>New</b> (HRG)	To be Reviewed	To be Reviewed	Meets Basic Qualification	Not Selected; Candidate Withdrew
2	<b>HR Review</b> (HRG)	To be Reviewed	To be Reviewed Under Consideration Phone Screen Completed	Passed HR screen	Not Selected; Candidate Withdrew
3	<b>HM Review</b>	To be Reviewed	To be Reviewed Under Consideration	Passed HM screen	Not Selected; Candidate Withdrew
4	<b>Interviews</b>	To be Scheduled	To be Scheduled 1 <sup>st</sup> Interview 2 <sup>nd</sup> Interview 3 <sup>rd</sup> Interview Phone Screen Under Consideration	Passed Interviews	Not Selected; Candidate Withdrew
5	<b>Pre-Offer Checks</b> (HRG)	To be Checked	To be Checked *Request References (2 <sup>nd</sup> Pass/external) Reference Provided/To be Checked (auto-move once provided) Reference Check in Process	Internal Candidate/NA Passed Checks	Not Selected; Candidate Withdrew

6	<b>Offer (HRG)</b>	Offer to be Made	Offer to be Made Has Declined Rejected	Save & Close then go to create offer	Not Selected; Candidate Withdraw
7	<b>Pre- Employment Checks (HRG)</b>	To be Checked	To be Checked Background Check Started Background Check Complete (auto-move once provided) Pre-Employment Screening Started Pre-Employment Screening Complete	Go to request screening service Passed check Once complete then use checkbox to start onboarding process	
8	<b>Hire (HRG)</b>	To be Hired	To be Hired	Hired- External Hired – Internal Rehire	

## Key Concepts to Remember

- **Hierarchy:**

- › A Candidate Selection Workflow (CSW) is comprised of a series of Steps reflecting the progression of candidates in the Workflow.
- › Each Step has a group of associated descriptive **Status**:
  - “**Initial**” status: The first/default status in each step
  - “**Intermediate**” status: Status detailing the Candidate’s progression within the Step, often informational.
  - “**Completion**” status: When completed, allows the candidate to advance to the next Step.
  - “**Non-Selection**” status: This ends the candidate participation in the Requisition. Users can select from a list of detailed **reasons** to elaborate on why the candidate was not selected or withdrew from consideration.

- **Candidate movement:**

- › Candidates **change status** within a step
- › Candidates **move** from one step to the next after reaching the completion status, withdrawing, or Not Selected
- › Candidates are **assigned** a disposition code from a list of available reasons why they were not selected, and free text fields are available for comments.