iForms: Candidate Selection

Introduction
The hiring manager can perform the candidate selection process after:

a. the department has opened and approved a requisition for a position; and
b. candidates have been referred to that requisition.

Note: The Initiator, Recruiter and Hiring Manager (whose name is required on the req) can see the requisition. To add a name, click the Select Search Type dropdown and select Primary Departmental Contact. To add other names, call your recruiter.

Summary of the Hiring Steps:
1. Open a Requisition.
2. Candidate Selection Process: review candidates; interview; click 40 Verbal Offer and 45 Verbal Offer Accepted on the preferred candidate.
3. Save both 45 the Verbal Offer Validation Form and 90 the Contingent Offer.
4. Take tracking actions on the other candidates.
5. Click yes to close the Requisition.
6. Complete the Hire or Transfer Form.

Begin Candidate Selection Process
1) Log into iForms:
   a. Go to the website: work.duke.edu. (Note: do not type in http://www.)
   b. Enter your Duke NetID and password. (If you do not have access to iForms, ask your SAP User Administrator to give you access to Candidate Selection).
2) Click the Candidate Selection tab.

Candidate Selection Home Page

Reqs menu: Allows you to view Reqs assigned to you and to view Candidates referred by your recruiter. Access the Reqs menu by clicking on the word “Reqs.” The down arrows on the menu bars will not advance you to subsequent screens.

Candidates menu: Should not be used by Hiring Managers.
View Open Requisitions

1) On the Enterprise toolbar, follow the menu path: **Reqs** ➔ **View my reqs** ➔ **Open**

![Image of Requisitions Menu]

2) On the **View my reqs: Open** page, notice the column headings.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Select a req</th>
<th>Req folder</th>
<th>Requisition Number</th>
<th>Position Title</th>
<th>Positions Remaining</th>
<th>Hiring Manager</th>
<th>Recruiter</th>
<th>Duke Entity</th>
<th>Location</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Close X</td>
<td></td>
<td>-00016278</td>
<td>PROGRAM COORD 1</td>
<td>1</td>
<td>WOODARD, DESIR</td>
<td>UNIVERSITY</td>
<td>Durham</td>
<td>27-Jul-20</td>
<td></td>
</tr>
</tbody>
</table>

- **Select a req**: Allows user to select a Req for action. Do not click on the Close X button unless you want to close a requisition.
- **Req folder**: Icon shows if Req has received action.
- **Requisition number**: Number assigned to the Req. Click on the number to see specifics about the Req, such as position number.
- **Position Title**: Title of the Position.
- **Positions Remaining**: Number of positions remaining open for hiring. Will always show “1.”
- **Hiring Manager**: Name of assigned Hiring Manager in department.
- **Recruiter**: Name of assigned Recruiter in HR department.
- **Duke Entity**: University or Health System entity that owns Position.
- **Location**: City where Position is based.
- **Date Opened**: Date Position was opened in system.

*NOTE*: Columns may be sorted in alpha or numerical order by clicking on the column heading. A small box will appear to indicate whether the sorting is in ascending (A→Z) or descending (Z→A) order.

View Candidates Assigned to a Req

1) In the **Req folder** column, see if the folder is colored **white** or **orange**. A white folder indicates that no candidate activity has occurred on this Req. An orange folder indicates that candidate activity has occurred. When you click on the orange folder, you should see names of candidates. If you do not see any names in an orange folder, candidates may not have been referred to the requisition.

![Image of Candidates Assigned]

Showing reqs 1 - 5 of 5

<table>
<thead>
<tr>
<th>Select</th>
<th>Req folder</th>
<th>Requisition Number</th>
<th>Position Title</th>
<th>Positions Remaining</th>
<th>Hiring Manager</th>
<th>Recruiter</th>
<th>Duke Entity</th>
<th>Location</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>000016278</td>
<td>PHYSICAL THERAPIST ASSIST</td>
<td>1</td>
<td>Tucker, Jane</td>
<td>HEDMAN, CHRISTOPHE</td>
<td>DUKE HEALTH COMMUNITY CARE</td>
<td>Durham</td>
<td>05-Jul-20</td>
</tr>
<tr>
<td></td>
<td></td>
<td>000016282</td>
<td>CLINICAL NURSE EDUCATOR</td>
<td>1</td>
<td>Tucker, Jane</td>
<td>HEDMAN, CHRISTOPHE</td>
<td>DURHAM REGIONAL HOSPITAL</td>
<td>Durham</td>
<td>05-Jul-20</td>
</tr>
</tbody>
</table>
2) Click on the Req folder.

3) If no list is returned, your recruiter has yet to forward any candidates to you.

4) If candidates have been forwarded, click on the orange folder to view the Req Folder screen with selected candidates:

   ![Req Folder Screen]

   **NOTE:** The Search candidates and Search reqs boxes at the bottom of the screen are used by central offices.

5) View the column headings in the Req Folder.

<table>
<thead>
<tr>
<th>Name</th>
<th>Candidate’s name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewed</td>
<td>✓ indicates that Candidate’s file has been viewed.</td>
</tr>
<tr>
<td>Notes</td>
<td>Indicates whether there is a note on the Candidate.</td>
</tr>
<tr>
<td>Forms</td>
<td>Shows if forms have been processed for the Candidate.</td>
</tr>
<tr>
<td>HR status</td>
<td>Shows any actions that have been taken on Candidate.</td>
</tr>
<tr>
<td>Candidate type</td>
<td>Internal, External, External Nursing, Unavailable, Inactive, Layoff, Past employee, PDI, Return to work</td>
</tr>
<tr>
<td>HR status (update)</td>
<td>Allows user to take action on Candidate.</td>
</tr>
<tr>
<td>HR status date</td>
<td>Date most recent action was taken.</td>
</tr>
<tr>
<td>Updated by</td>
<td>Recruiter who referred Candidate to Req.</td>
</tr>
<tr>
<td>Last codes</td>
<td>Assigned by system.</td>
</tr>
</tbody>
</table>
6) Click on the candidate’s **name** to view the person’s **Talent Record**.

![Talent Record screenshot]

**NOTE:** Click on Resume/CV, Forms, or HR status instead of the Talent Match button.

7) Review the data in the **Overview** tray. The tray will be open by default.

8) To review the Candidate’s resume and letter, open the **Resume/CV** tray. From the Resume/CV tray select **Print resume/CV** to print. If the candidate uploaded their resume, there will be a **View PDF** button. Click on this to print a formatted version.

9) If you’re not interested in the candidate, tracking actions can be taken at this point. Under the **HR Status (click to update)** column for that candidate, click **25 Dept Resume Review**. Go to the bottom and click **Update and Add Next** and then click one of the DNI reasons, such as 60 – DNI – Length of Experience and **Update**.

10) To review the list of forms created by or for the Candidate, open the **Forms** tray.

11) To review HR status, open the **HR status** tray.

**NOTE:** You can view multiple candidates at one time.

1) On the Req folder screen, click the **Select all** button to the left of the Names.

2) In the left margin, click on the **View** icon.

3) The resulting **Talent Record** screen will contain links to the Talent Records of all selected candidates.

4) To view the other Talent Records, click on the **Next** link at the top of the screen.
Perform Tracking Actions

1) In the **HR status (click to update)** column, click on the status related to the candidate you wish to act on.

2) Select the action you wish to take by clicking the radio button next to the action.

3) Click on the **Update** button if you wish to take only the specified action.

4) Click on the **Update and add next** button if you wish to take the specified action **AND** move forward to the next action.

   **NOTE:** A complete list of Tracking Actions can be found in the Appendix on pages 8, 9 and 10.

5) Click on the **Undo status** button if you wish to reverse the current status.

   **NOTE:** Do not undo Action 20-Forward to Dept. If you undo the action, the candidate will be removed from your Req, and you will have to contact your recruiter to have the candidate returned to your Req.

Make an Offer / Hire

1) Once you have decided on the candidate you wish to hire, click on the **HR status (click to update)** link related to the candidate you wish to hire.

2) Select Action **25-Dept. Resume Preview** or Action **30-Dept. Interview**, and click on the **Update and add next** button.

3) If appropriate, select Action **35-Next Dept. Interview**, and click on the **Update and add next** button – or go on to 40-Verbal Offer Extended.

   **NOTE:** BEFORE you make a Verbal Offer and click on 40-Verbal Offer Extended, check your department procedures for approvals for offers.
4) **REQUIRED:** Select Action **40-Verbal Offer Extended** and click on the **Update** and **add next** button.

   **NOTE:** When you click **40-Verbal Offer Extended**, a Reference Check form will appear. Follow your department’s process for checking references and click on the **SAVE** (not CLOSE) button at the bottom of the form.

![Reference Check Form](image)

5) **REQUIRED:** Select **45-Verbal Offer Accept** and click on **Update** and **add next** to get the **Verbal Offer Validation** form. **It is important because this data will populate the Hire or Transfer forms.**

![Verbal Offer Validation Form](image)

6) **REQUIRED:** On the **Verbal Offer Validation Form**, check the candidate’s information. Make any changes and click on the **SAVE** (not CLOSE) button.
**NOTE:** Be sure to click on the **Save** button at the bottom, not the **Close** button. The **Save** action will move the candidate’s data to the Hire or Transfer form. The **Close** action simply closes the window without saving. If you did not save 45, go back into the requisition and click on the **Undo** button and do 45 again to send the information to the Hire or Transfer form.

7) On the **Add Form** screen, click on **Continue**.

8) **REQUIRED:** select Action 90-Cont. Offer/Hired. Click **Update and add next**.

9) Complete the **Reference Check** form if this has not been done.

10) The system will prompt you to update the status on the remaining candidates.

11) **REQUIRED:** You will be asked if you want to close the requisition. Click on **YES**, not **Cancel**. Call your recruiter if you have questions.

**NOTE:** Tracking Actions are required before a Req can be closed. Those candidates who will not be hired must have their statuses finalized. You may update the statuses of those candidates in either of two methods:

   a) During the Contingent Offer process; or

   b) From the **Req Folder** list.

**Update HR Status of Remaining Candidates during Contingent Offer Process**

1) Verify that check marks appear next to the names of the remaining candidates. All selected candidates will be updated with the same action unless you uncheck them.

2) Deselect any candidates who will receive some other action. Use only the items with numbers in the 60s and 70s (the 160s and 170s are for recruiters only).

3) Select the appropriate action and click on the **Update** button.

4) The system will prompt you to take steps 1-4 for the deselected candidates.

5) Click **OK** on the **Update Status** screen.

**Update HR Status of Remaining Candidates from the Req Folder List**

1) At any point during the Candidate Selection process, you may select the DNI or CNI actions for a candidate.

   **NOTE:** DNI is an acronym for “Duke Not Interested,” while CNI stands for “Candidate Not Interested.”

2) You may update the status on multiple candidates by checking the numbered boxes next to the candidates’ names, and then clicking on **Update same status** in the left margin.
Appendix

HR Status Actions

20-Forward to Dept.
25-Dept. Resume Review
30-Dept. Interview

30-Dept. Interview
60-DNI-Education
62-DNI-Length of Experience
63-DNI-Licensure/Cert
64-DNI-Skills
66-DNI-Unsatisfactory

References
iForms: Candidate Selection

35-Next Dept. Interview
40-Verbal Offer Extended **REQUIRED**
60-DNI-Education
61-DNI-Finalist Not Selected
62-DNI-Length of Experience
63-DNI-Licensure/Cert
64-DNI-Skills
66-DNI-Unsatisfactory References
70-CNI-Accepted Another Offer
71-CNI-Candidate Withdrawn
72-CNI-Job Duties
73-CNI-Personal/Other
74-CNI-Location
75-CNI-Salary

45-Verbal Offer Accept **REQUIRED**
50-Verbal Offer Decline
70-CNI-Accepted Another Offer
71-CNI-Candidate Withdrawn
72-CNI-Job Duties
73-CNI-Personal/Other
74-CNI-Location
75-CNI-Salary
80-Offer Rescind
90-Cont. Offer Ext./Hired **REQUIRED**
## Update status for Dodson, Carol

### Current status

<table>
<thead>
<tr>
<th>Status</th>
<th>Updated by</th>
</tr>
</thead>
<tbody>
<tr>
<td>80 - Offer Rescind</td>
<td>Woodard, Mike</td>
</tr>
<tr>
<td>90 - Cont. Offer Ext./Hired</td>
<td></td>
</tr>
</tbody>
</table>

### Action date

- Date: 24th July 2006

Notify users working with this candidate: [ ]

[Update] [Update and add next] [Undo status] [Cancel]
iForms: Hire & Transfer

To access the Hire iForm

NOTE: This action is equivalent to processing the RFO in the previous hiring process.

In order to access the Hire iForm, you must be an iForms initiator and have the Staff and Positions tab on the iForms home page.

1. Log into the iForms website: iforms.oit.duke.edu.
2. When prompted, enter your NetID and Password to go to the iForms home page.
3. Select the Staff & Positions Tab to open the Staff and Positions page.
4. Click on Positions, search by the position number on Position Search.
5. When you have the position, you will see the following screen with the position number and name, the beginning and end dates, the iForms icon and the forms:

<table>
<thead>
<tr>
<th>Position Number</th>
<th>Position Long Description</th>
<th>Begin Date</th>
<th>End Date</th>
<th>iForms</th>
</tr>
</thead>
<tbody>
<tr>
<td>50023760</td>
<td>CLINICAL NURSE</td>
<td>07/15/2023</td>
<td>12/31/2023</td>
<td>![iForms Icon]</td>
</tr>
</tbody>
</table>

Note: If you don’t have the position number, select Positions to see your Organizational Unit or a list of Units. Click on the Organization Unit that owns the position you want to fill. Scroll to the correct position.

6. Select the iForms icon ![iForms Icon] on the same line of the position you want to fill. This will bring up information about the Position and the list of iForms.
7. Click on Hire for the Hire iForm (external) or Transfer for an internal candidate.
The Hire Form will display with the Position information at the top and the candidate information that you saved in the Verbal Offer Validation Form:

8. Fill out the Hire iForm with the Date of Hire, Personnel Number (Duke Unique ID) of the candidate (if known), Date of Birth, Social Security Number, and Citizenship.

9. Click on the Search button to assign or retrieve the Duke Unique ID. Note: If a Duke Unique ID already exists for the person, it will be found.

10. You will get the following message. Check your data and click either OK or Cancel.
Note: if there are duplicate names, you will be asked to choose the correct name:

11. Continue filling out the iForm by selecting a reason for the Hire:

12. Fill in Personal Data, Organizational Data, and Check address (information known about the candidate, such as home address will populate from the Validation form):

13. Enter the Pay Rate, Work Schedule and Cost Distribution:
14. Check the iForm for accuracy by clicking on the Check button at the bottom.

15. Click the Documentation Requirements box to certify that you have reviewed and forwarded paperwork to the appropriate HR Offices.

16. Add comments by clicking open the Comments section (click on the blank square at the right). If the box is not visible, scroll to the right.

17. Submit the form by clicking the Submit button.

**To access the Transfer iForm (for candidates internal to Duke)**

In order to access the Transfer iForm, you must be an iForms initiator and have the Staff and Positions tab on the iForms home page.

1. Log into the iForms website: iforms.oit.duke.edu.
2. When prompted, enter your NetID and password to go to the iForms main page.
3. Select the Staff & Positions Tab to open the Staff and Positions page.
4. On the Staff and Positions page, enter the Position number in the Position Search box. Or click on Positions and a list of Organization Units will be displayed.
5. Click on the Organization Unit that owns the position you want to fill. You will see a list of positions in that Organization Unit. Select the correct position.
6. Select the iForms icon on the same line of the position you want to fill. This will bring up information about the Position and the list of iForms.
7. Click on Transfer for the Transfer iForm. Follow the steps above for the Hire Form.

Note: There is less information to fill out in the Transfer form because the candidate’s information exists in SAP (ex: addresses).