Create a Prospect

For Human Resource Partner

Quick Reference Guide

Prior to adding the prospect, ensure that the individual is not in Workday as a candidate. Follow instructions below on how to conduct the search.

Steps to Search Candidate in Workday:

1. From the search field in Workday at the top left corner, type in the name of your prospect and select enter.

If your search pulls your prospect’s name with a CAND account, select the record to confirm it is the same person.

If it is the same person, there is no further action needed, your prospect is already in Workday.

If you planned to invite your prospect to apply to a specific posting, at this time you can follow the QRG: Invite to Apply, to send an invite for the prospect to apply.

If after your search, you cannot locate your prospect, go to the next section Steps to Add an External Prospect or Steps to Add an Internal Prospect below.

Keep in mind

- Prospects are contacts (internal and external) that an HRP would like to track, but the prospect does not match a specific job posting.
  - Internal Prospects: are current and terminated employees of UChicago, who have an employee record in Workday.
  - External Prospects: are those who do not have an active employee record in Workday.

- By creating a prospect, a Primary Recruiter or a Recruiting Screener, can invite the prospect to apply to a specific job posting at a later time. (Please see QRG Invite to Apply)

Information needed

- Prospect’s biographical information (required: country, first and last name and e-mail address)

- Confirm if the prospect will be external or internal, by searching if the prospect has a Candidate record in Workday.
Required Steps to Add an External Prospect:

1. There are two ways to access the Create Prospect task.
   a. From the search field in Workday at the top left corner, type Create Prospect.
   b. From the Recruiting Worklet: Select Create Prospect, located under the Actions column.

2. Select Add New Prospect and click OK, at the bottom left hand corner.

3. Enter Prospect’s Biographical information and click OK.
   Country, First and Last name, and Email are required for submission. The email field is not marked with a *red asterisk, but it is required.

4. Review and select Done.

At this point you have created a prospect, who you can invite to apply or share with other colleagues to a current job postings.
Required steps to add an Internal Prospect:

1. There are two ways to access the Create Prospect task.
   a. From the search field in Workday at the top left corner, type Create Prospect.
   
   ![Create Prospect](image)
   
   b. From the Recruiting Worklet, select Create Prospect from the Actions column.

2. Select Add New From Coworkers, type in the name of the UChicago employee in the field, click OK, at the bottom left hand corner.

3. On the following page, review information update the optional fields as described below, click OK.

4. Select Done.

Once a prospect is added, the Primary Recruiter or the Recruiting Screener can now invite the prospect to apply to a posting.