Overview:
As part of the 7 stages in the Applicant Tracking, the Background Check step sits in the Offer stage, which is the sixth stage.

The Background Check step sits in the Offer stage of the Applicant Tracking process in Workday—after an offer letter is generated and the offer is accepted but prior to hire.

Keep in Mind
- Primary Recruiters will see the “Ready for Hire” option under Move Forward only after the Background Check Status has been cleared by Shared Services
- Exception Letters allow candidates to be hired without a background check clearance

Information Needed
- Job Requisition Number
- Candidate Name and Candidate Number
- If Applicable: A completed Background Check Exception Letter (if applicable)
  - A template can be found on the Shared Services ServiceNow Portal
Process:

The Background Check step is part of the Offer stage.

1. Set the **Offer Status**, to Verbal Offer Accepted or Written Offer Accepted.

   - Select **Set Offer and Employment Agreement Status**.
   - Select one of the following:
     - Verbal Offer Declined
     - Verbal Offer Accepted*
     - Written Offer Declined
     - Written Offer Accepted*

2. Return to your Inbox and submit the “To-Do”.

3. **STOP**, Shared Services is processing a background check, if the offer was accepted.

4. **Do not select** **Move Forward - Make New Offer**, unless you have selected either of the two “Declined” options in Step 1 and have renegotiated a new offer.

5. When the Background Check Status is set to Passed, Not Required (internal hire), or Background Check Exception, the Ready for Hire step will be available from the Move Forward button.
6. Select **Move Forward-Ready for Hire** from candidate grid, or selected from the task in your Inbox.

7. Click **Done**

**Tracking Background Checks:**

Human Resources Partners can track the background check status of their candidates in two ways.

1. Run the **Candidate's Background Check Status** report in Workday
   i. From the Workday search field search for “Candidate's Background Check Status.”

   ![Candidate's Background Check Status search](image)

   Or from your Recruiting Worklet, from the View Column select “**Candidate's Background Check Status**” report.

   ![Candidate's Background Check Status report](image)

   ii. Search by either the Job Requisition or the Candidate’s name, by typing the requisition number or the candidate’s name in the appropriate field.

   ![Search bar with requisition and candidate name](image)

   iii. Select **OK**

2. Review the **Additional Data Section** on the Candidate’s Profile.

![Additional Data Section](image)
Background Check Exception Process:

1. To inform Shared Services Recruitment Retention Specialist that your unit would like to move forward with the hire while the background check is pending, the Primary Recruiter will need to upload the completed and signed Background Check Exception letter on the candidate’s profile. A template for this letter can be found on the Shared Services Knowledge Base.

To upload documents:

i. From the Candidate’s profile, select the **Attachments Tab**.

![Attachments Tab](image)

ii. Select **Add** and select file from saved location to upload the document.

iii. Identify the category by using the related prompts and select **Background Check**.

![Category Prompt](image)

iv. Select **OK**

2. Once the document is uploaded, inform Shared Services Recruitment Retention Specialist by typing a comment in the Workday Activity Stream and tagging your Shared Services contact.

   i. Go to the candidate’s profile, scroll down to the Activity Stream.
   
   ii. In the field, type “@” and search for your unit’s Recruitment Retention Specialist contact, select enter.
   
   iii. Once the name is selected, type “Background Check Exception letter Uploaded”, next to the name.
   
   iv. Select **Post**. This will send a notification to the contact.

![Activity Stream](image)

**TIP:** If the unit has determined that a background check exception will be requested at the time the offer has been accepted, it is recommended to upload the letter in the candidate’s profile at “Set the Offer” step, within the Offer Stage.

**Note:** Shared Services initiates background checks for all positions that a job requisition is created. If no job requisition is created, the unit’s HRP must initiate the background check.