West Virginia University Standard Candidate Selection Workflow

**LEGEND**
- **Blue** = Initial status
- **Black** = In progress status
- **Green** = Completion status (ready to move to next step)
- **M** = Mandatory Step
- **R** = Restricted to
# Candidate Selection Workflow (CSW)

## What is a CSW?
A CSW (Candidate Selection Workflow) is the process we use to track and manage candidates from the time they are new to the system, to the time that they are hired. The process used for each requisition is chosen on the Administration Tab of the requisition. There may be one default option for CSW, or your organization may have more than one choice.

## What is a Step?
A step tracks which part (step) of the selection process each candidate is in. In the Candidate List View, steps are organized into Tabs. As candidates are moved to each step, they appear under the tab that represents that step.

## What is a Status?
A status tracks details about where the candidate is within a particular step. For example, in any "Interview" step, is the interview "To be Scheduled", has it been "Scheduled", or is the interview "Completed"?

## How do I move a candidate from one step to another?
1. You must first ensure the candidate is in the "Completion" status of the step you are moving them out of. If not, you must change the status of the candidate to the "Completion" status.
2. Select the candidate and drop-down to "Move..." in the "More Actions" menu
3. Populate the drop-downs to move the candidate to the appropriate next step, with the appropriate next status within that step
4. Click Done

## How do I change a candidate’s status?
1. Select the candidate and drop-down to "Change Status..." in the "More Actions" menu
2. Populate the drop-downs to change the candidate's status to the appropriate status
3. Some statuses (such as rejection and decline) will require you to provide a disposition
4. Click Done

## How do I manage a candidate’s status in the step of Offer?
1. Once you have moved the candidate to the step of Offer, with a status of "Offer to be Made" using the instructions above, you may change the candidate's status to "Rejected" or "Declined" using the same process as with any other step.
2. To change the candidate's status to any other status in the step of Offer, you must use Action Icons located on the Offers Tab of the Candidate's File. To access the Offer Action Icons:
   a) Click on the candidate's name hyperlink from the Candidate List View, to access the Candidate File
   b) Be sure you are on the candidate's Offers Tab (not the General Tab) and you will see appropriate icons at the top related to offer actions that the candidate is eligible for, based on their current status.

## Shortcuts:

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Description</th>
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<tbody>
<tr>
<td>✔️ Checkmark</td>
<td>Use this shortcut to change the status of the candidate to the designated &quot;Completion&quot; status of the step</td>
</tr>
<tr>
<td>❌ Reject</td>
<td>Use this shortcut to change the status of the candidate to the &quot;Rejection&quot; status of the step</td>
</tr>
<tr>
<td>✚ Triple Checkmark</td>
<td>Use this shortcut to move all candidates who have completed the step to the next step (NOTE: ALL candidates in the completion status, whether selected or not, will move to the next sequential step of the workflow)</td>
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**TIP:** Hovering over each of the above shortcuts will display a tooltip that specifies the exact action that will occur, including which step/status the candidate will be taken to