Sterling

Workflow Document

What is the Workflow Document

- The Workflow Document is a full account of the information that candidates are providing in their application within Candidate Hub, including employment history and educational verifications.

Why is This Useful

- Upon a candidate submitting their information within the Sterling application, clients may sometimes find that certain services have not launched upon submitting an order.
- Leveraging the Workflow Document enables the client to identify where there may be a hold up with the order. For example, education or employment might be missing from the application. By reviewing the Workflow Document, clients can get a better understanding as to why this is happening (e.g. the candidate may have skipped this section).
- Clients can also review the workflow document and add on additional a la carte services to an order, such as additional verifications.

How to Leverage Workflow Data

- To access the Workflow Document, go to the Order Editor view for your candidate's order and locate the document within the attachment section
- After downloading the document, you can find view the information your candidate has provided.
- To add an additional a la carte service to your order, click on Add Search within the same order. From here you can select your required search. When you have added your new search, click Submit and the search will immediately get routed to the appropriate team to process.

You can view this quick guide on how to find and use the Workflow Document here.

If you have any questions on Assigning Orders, please reach out to your Client Success Partner.