SmartRecruiting™ User Guide

918 E. Green Street
Pasadena, CA 91106
Web: http://www.ez-data.com
Telephone: (626) 585-3505
Fax: (626) 440-9097
U.S. toll-free fax: (800) 779-3123

Table of Contents

Key Benefits of the SmartRecruiting Module

The SmartRecruiting module for SmartOffice is for use by corporate and agency staff to track the process of recruiting individuals as agents, although it can be used to hire individuals for virtually any position. Key benefits of this module include:

- Clear reporting of recruiting activity on a monthly basis.
- Facilitating best practices with the ability to define and create recruiting workflows and their components in the System office for enterprise-wide distribution.
- Allowing flexibility with ability for local offices to copy and modify System office recruiting workflows and their components, or even create entirely new ones if necessary.
- Stage-by-stage tracking of the recruitment process allows management to always know the status of a candidate so that none get misplaced in the process.
- Online reporting that summarizes all recruiting activity and respective results using a year-to-date and monthly average format.
- Reports produced in standard HTML or PDF formats, making for easy printing, faxing or e-mail. Recruiting data can also be exported to other management reports.
- Recruitment hiring workflows are completely customizable, allowing management to construct a unique series of steps including interviews, correspondence, or testing that meets the needs of your company.
- Allowing management to understand the statistics of the recruitment process. For example, a user can track how many **Potential Candidates** are necessary to obtain a certain number of initial **interviews** in order to hire a target number of contracted agents. This ratio can be used for future recruiting planning.
- Tracking and accounting for activity with **nominators** and **centers of influence**, and tracking the success coming from different candidate sources.
- Providing a simple activity and efficiency point system for recruiting based upon 100 points per month as the goal.
- Straightforward, cost effective system that makes recruiting activity reporting easy.

General Information and First Steps

Once the setup procedures have been performed (a necessary first step), the module is used in a manner consistent with contact management in SmartOffice, but with some notable variations.

When candidates are entered into SmartOffice using SmartRecruiting, they are added as advisors in Candidate status or contacts as determined by the position workflow assigned to them at that time. However, candidates have their own search, summary, and detail section when SmartRecruiting is present. Open the Candidate/Recruit Summary by using the Candidate Search dialog box, accessed by clicking **Candidate Search** on the Recruitment Tracking submenu of the side menu.

The interface for candidate records is similar to the interface for individual contact records, but with a significant difference: a position must be selected for each candidate record being added.

The candidate is automatically placed in the first stage of the position when added. The Interview tab page is the heart of SmartRecruiting and as a result, most of the action takes

place here. This page displays the stages of the position and is used to quickly review the interviews and actions for a particular stage, enter and check the results of completed interviews and actions, and mark stages as complete.

SmartRecruiting also tracks precontract activities such as licensing preparation, licensing, pre-contract curricula, certification, and appointments. This is performed from the Precontract tab.

The candidate can be hired or contracted at any time by clicking the Hire button or changing the status to Hired/Contracted. When this occurs, all stages are closed automatically and all required actions and interviews are completed. The status of the advisor or contact record then changes automatically to Active.

SmartRecruiting Setup

Notes for Enterprise View/Office Hierarchy Users

The main position workflows and their components will generally be created at the System office by Home Office personnel, but these workflows and components can also be created at higher offices in the hierarchy for availability to lower offices. Workflows and components can even be added at the lowest offices for those offices' exclusive use. System and higher-office position workflows can also be copied at lower levels and customized at the individual office level, if there is such a need. If separate office-level customization is not needed, SmartRecruiting administrator privileges should be granted only to home office personnel by assigning a Recruiter Administrator role to these users from User Management.

Setup Dialog Box

Begin the setup by opening the Setup dialog box, available from the Recruitment Tracking submenu if the user has the Recruiter Administrator role. The setup should be done in the order indicated on the Setup dialog box, with positions added only after all other various component types have been added.

The dialog box toggles between the following spreadsheets:
1. Stage Types
2. Interview Types
3. Action Types
4. License Types
5. Curriculum Types
6. Positions

Each is listed on the dialog box's side menu. Clicking the item opens the corresponding spreadsheet.

Procedure

1. Click the **Recruitment Tracking** menu item and then select **Setup** from the expanded list.
2. When the Setup dialog box opens, select **Stage Types**.

3. Click the **Add** button on the Stage Types to add a stage type record. When the Stage Type dialog box opens, enter the name of the stage type into the **Stage Name** field and then click **OK**. Repeat this step until all needed stage types are added.
4. In the Setup dialog box, select **Interview Types**.
5. Click the **Add** button on the Interview Types toolbar to add an interview type record. When the Interview Type dialog box opens, enter the name of the interview type into the **Interview Name** field and then click **OK**. If the interview is a requirement, the **Required** check box is selected. Repeat this step until all needed interview types are added.
6. In the Setup dialog box, select **Action Types**.
7. Click the **Add** button on the Action Types toolbar to add an action type record. When the Action Type dialog box opens, enter the name of the Action Type into the **Action Name** field and then click **OK**. If the Action is a requirement, select the Required checkbox. The default setting under the Action Document section is No Action Document, but if the Action involves a document, select another document link option radio button as appropriate. To embed a document, select **Upload the document to server** and then click **Browse**. If the document can be accessed from the Internet or your intranet using HTTP (the web), select **Save a link to the document** and enter the URL in the accompanying field. When the Choose File dialog box opens, navigate to the location of the document, select it and then click **Open**. In all cases, click **OK** to save the action type. This step is repeated until all needed action types are added.
8. In the Setup dialog box, select **License Types**.
9. Click **Add** on the License Types toolbar to add a license type record. When the License Type dialog box opens, enter the name of the license type into the **License Type** field and then click **OK**. Repeat this step until all needed license types are added.
10. Select **Curriculum Types** from the Setup dialog box's side menu.
11. Click the **Add** button on the Curriculum Types toolbar to add a curriculum type record. When the Curriculum Type dialog box opens, enter the name of the curriculum type into the **Curriculum** field and then click **OK**. This step is repeated until all needed curriculum types are added.
12. In the Setup dialog box, select **Positions**.
13. Click **Add** on the Positions toolbar to add a Position record. This opens the Position Setup Wizard in add mode. See the *Position Setup Wizard* section below.
14. After adding all needed positions, click the **Close** button to exit the Setup dialog box.

Position Setup Wizard

The Position Setup Wizard contains four main screens and one auxiliary dialog box:
1. Select Position – Step 1 of 4
2. Select and Order Stages for the [Position Name] Position – Step 2 of 4
3. Select Interviews and Actions for Each Stage – Step 3 of 4
   - Interview and Action Assignment auxiliary dialog box

4. Select License Types and Curricula for the [Position Name] Position

The Position Setup Wizard is where stage, action, interview, license, and curriculum types are woven into position workflows, thus creating positions, stages, interviews, actions, license preparation periods and precontract curricula.

Here is a conceptual diagram of the way that the Position Setup Wizard connects the various component record types:
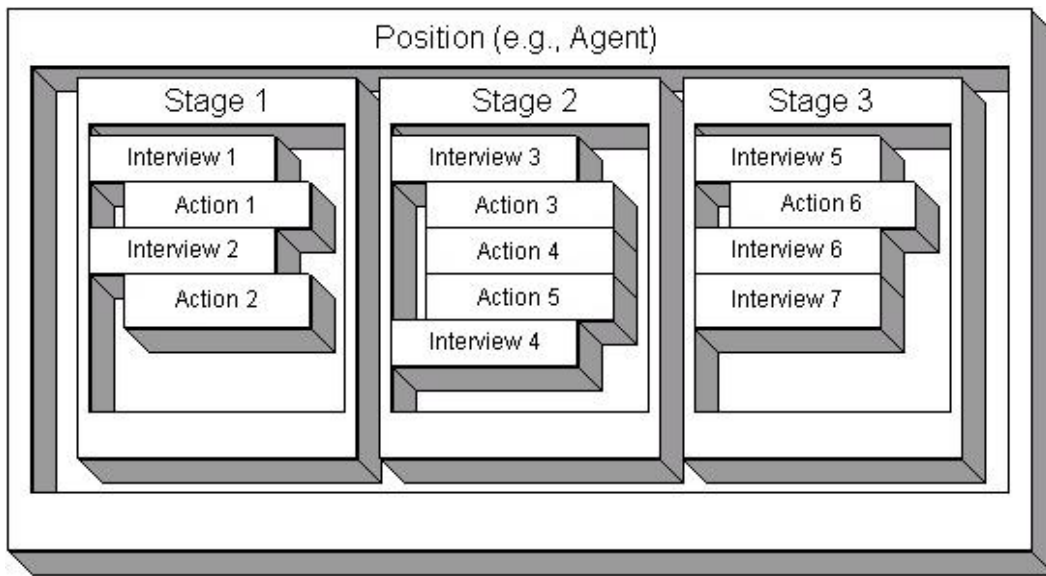
SmartRecruiting allows a generous number of interviews or actions to be associated with each stage and stages that can be associated with each position.

A stage can be used in more than one position; however, it cannot be used more than once in the same position. The assignment of interviews and/or actions to a stage in one position does not apply if that same stage is used in another position. An interview or an action can be used once per stage in all positions.

Position Setup Wizard Procedure

1. Click the **Add** button on the Positions toolbar to add a Position record.
2. When Step 1 of 4 opens, enter the name of the position into the **Position** field. A short description of the purpose of the position workflow should be entered in the **Description** field.
3. If the purpose of the position workflow is to recruit advisors, select **Advisor** from the Type When Hired drop-down list. This will create an advisor record of the Candidate status when the user adds a candidate into this position workflow. If the position workflow is intended to hire Candidates for some type of non-advisor job, select **Manager** or **Staff**. This will create a contact record of the Candidate type when you add a Candidate into this position workflow. When the candidate is hired, the contact type will change to Manager or Staff as selected. Click **Next**.

4. When the Step 2 of 4 dialog box opens, there will be a series of drop-down lists labeled Stage 1 through Stage x, where x = the number of stage types that have been entered into the Setup. Stage 1 will always be To Be Contacted and is read-only. Select the stage type to be assigned as the second stage from the Stage 2 drop-down list. Continue in a similar manner at the Stage 3 drop-down list and beyond until all the stages have been selected. A stage cannot be selected more than once per position. Any unused drop-down fields can be left blank. Click **Next**.
5. Step 3 of 4 has a spreadsheet list with three columns: Stage, Interview Type, and Action Type, showing the stages selected in the previous step with the interviews and actions that will be assigned to them. To add or modify interviews and action assignments in a stage, click the row hyperlink under the stage column. (Note: It is not required to add interviews or actions to any stage, but not doing so would severely diminish the functionality the module provides.) This will open the Interview and Action Assignment dialog box for the Stage selected.
6. The Interview and Action Assignment dialog box consists of two spreadsheet lists, Interviews and Actions. The lists are a summary of all interview and action types that have been created in the Setup. Select the components of the stage by tagging the rows in both lists that correspond to the interviews and actions needed. Click **OK** when finished to close the dialog box.
7. Repeat Step 6 as needed for each stage and then click the **Next** button in the Step 3 of 4 dialog box.
8. Step 4 of 4 consists of two spreadsheet lists, License Preparation Periods and Precontract Curricula. The lists are a summary of all License and Curricula Types that have been created in the Setup. When Step 4 of 4 opens, tag the Preparation Periods and Curricula that are to be seen in the Precontract tab of Candidates in this Position. Click the **Save & Close** button to save these relationships for this Position or click the **Save & New** button to return to Step 1 of 4 to repeat the process for the same or another Position.

Main Process

SmartRecruiting System Components

SmartOffice Calendar

- The Calendar serves as the appointment and time management book for management.
- Standard SmartOffice activity scheduling is enhanced by allowing calls and appointments to be linked to **interviews** and **actions** for each stage of the recruitment process.
- SmartRecruiting is used to schedule **appointment activities** with recruitment candidates, centers of influence, agents and others.
- The MonthView of the Calendar helps identify if enough recruiting time is being booked.

RAM Monthly Report

The Monthly RAM Report© tracks the progress of the recruitment process each month, providing a quick snapshot of a manager's accomplishments. Monthly reports are tracked in SmartRecruiting for comparison and can be exported to a variety of formats for review.

Standard columns include **Potential Candidates** and their qualifying information, sequential recruiting, and selection steps. The columns are customizable to allow offices to label each stage to match personalized settings in SmartRecruiting. The final columns account for activity and efficiency points as well as contacts with centers of influence. The point system awards activity and efficiency points as follows:

- 1 point for each new Potential Candidate
- 1 point for each face-to-face interview with a nominator or center of influence
- 1 point for each face-to-face contact with a candidate (e.g., interviews, tests)

SmartRecruiting Candidate Records Detail Section and Other Relevant Records

The **Candidate/Recruit Summary** is color-coded to match certain statuses used. Each **Potential Candidate** record is yellow. After an initial interview or passage of a selection test, Potential Candidates are manually changed to **Candidates** that are color-coded white.

Nominators and centers of influence are entered into the main contact section as their respective contact type. A center of influence interview only appears on the Monthly RAM Report if the user completes an appointment with a contact of the Center of Influence type.

When a candidate is Hired or Contracted, the record is color-coded gray. At this point, the status of the advisor or contact record changes to Active. Candidate records store the name, addresses, phone numbers and all contact with the candidate by using the Calendar, Activity Log, SmartPad, etc.

File Folders

When a Potential Candidate becomes a Candidate, a paper file folder is created. The Candidate File Folder contains the case history notes, which are updated with each contact or completed step. This information is typically kept in the SmartPad and can be transferred from there.

- The Candidate File Folder allows a manager to easily track the status of each candidate.
- Record keeping is seamless as candidates move through selection, training, and contracting.
- If a candidate is hired, the file folder becomes their agent file folder, providing a record of the agent's entire career.
- Each center of influence and nominator also has a file folder with a record of all contacts, names secured, and any other pertinent notes.

The RAM Year to Date Report

This summary provides a powerful overview of recruiting activity and results, displaying both monthly averages and year to date totals.

In the top pane, the report includes information on the number of:

- Identified candidates
- Initial interviews conducted
- User-defined stages completed
- Contracted agents or reps to come from an activity
- Recruiting related appointments made
- Recruiting related appointments kept
- Center of influence interviews or meetings
- Candidates coming from center of influence meetings
- Selection interviews (Total)
- Selection tests (Total)

In the bottom pane, the report lists total contracted Agents or Reps coming from different sources:

- Agent referrals
- Centers of influence
- Nominators
- Personal observation
- Internet
- Other

SmartRecruiting System Procedure

Step One: What Happens When You Receive a Candidate's Name?

1. Create a record for the candidate. Set the status as **Potential Candidate**.
2. Schedule a call activity in the Calendar some time in the next 30 days. This action is part of the **To Be Contacted** stage and the call should be linked to this action.
3. The candidate's name displays in the **Potential Candidates** column of the current month's page in the Monthly RAM Report©.
4. The qualifying information is recorded in the appropriate columns:
   - Nominator's Initial - If the candidate is nominated
   - How Secured - (Agnt) Agent Referral, (PO) Personal Observation, (Nom) Nominator (COI) Center of Influence (NET) Internet (O) Other
   - Age (Approximate)
   - Income (Approximate)
   - Occupation

Step Two: What Happens as They Are Contacted and Move Through the Process?

1. If the candidate shows no interest now or in the future when called, select the candidate record and then click the **Reject** button or manually change the status to Dead Filed Potential Candidate.
2. If the candidate cannot come in now but expresses interest, the call and results are recorded and a follow-up call should be scheduled some time in the next several months. Manually change the status to **Inactive Candidate**.
3. If the candidate agrees to an initial interview or to take the first selection test, then:
    * Mark the call linked to the action **Done**. Complete the **To Be Contacted** stage and advance the candidate to the next stage.
    * The next stage should include the interview or action corresponding to an interview or examination to be administered. Create an **appointment activity** and link it to the interview or action.
4. If the candidate passes the test or completes a satisfactory initial interview, the candidate status is changed from Potential Candidate to Candidate.
    * Mark the previous activity as **Done** and, when prompted, record the outcome (the interview or action can also be completed directly, which automatically marks the activity Done).
    * Change the status to Candidate.
    * Create an activity for the next interview or action and link it appropriately.
    * Use the case history notes to create a candidate file folder.
    * Ensure that the candidate file folder contains the date and results of the successful testing or interview, the date and purpose of the next meeting.
    * The actual test, results page and/or notes from the initial interview are also placed in the file.
5. For the second interview or test, repeat the previous process.
    * Record the details of the next interview or test in appropriate subsequent stages.
    * The name and date of the meeting is recorded in the corresponding Stage column of the current month's RAM Report page.
    * Update the case history notes accordingly.
    * The activities for upcoming interviews or actions are entered using the Calendar or Activity Log and are linked.

Step Three: How Are the Activity and Efficiency Points in the RAM Monthly Report Assigned?

1. When an event is complete, points are assigned immediately and are recorded in the right hand column of the RAM Report© Booklet.
2. Points are assigned for each of the following activities:
    * One point for a new name or **Potential Candidate.**
    * One point for completing a face-to-face interview or test with a Potential Candidate (or spouse).
    * One point for each face-to-face interview with a center of influence.

3. Although the statistics for each agency's results will vary and will depend in large part upon the sources of leads, industry research suggests that an average of 20-30 initial interviews are required to obtain a contracted agent.
   - Depending upon name sources, about 40 names a month are required to obtain 20 initial interviews (which would yield 60 points).
   - 15 initial tests add 15 additional points for a total of 75 points.
   - Ten in depth interviews add 10 more points for a total of 85 points.
   - The remaining points to reach a goal of 100 per month can be obtained by adding points for subsequent steps in the process with worthwhile candidates and contacts with centers of influence.
   - Based on the figures above, a 100-point month would create one to two contracts per month.
4. Only time and measurement will yield specific answers for a given agency, but this system allows for the ongoing collection of this critical data.

Step Four: What About Centers of Influence and Other Nominators?

1. When names of nominators or centers of influence are acquired, record them in the main contact section with a contact type of **Center Of Influence**.
2. If a nominator cannot or does not want to help when contacted, delete the contact record.
3. If the nominator seems receptive, schedule a face-to-face appointment in the Calendar.
4. After the first face to face appointment occurs, the following actions are taken:
   - Mark the appointment as **Done**.
   - Enter any new planned calls or appointments with the COI.
   - Create a file folder for the nominator/center of influence.
   - When the name of the nominator/center of influence displays in the **Activity Summary** section of the Monthly RAM Report©, one point is earned.
   - If new referrals were obtained, the number of new referrals obtained displays in the **Results** column.
   - Each referral is entered as a **Potential Candidate**, with **Centers Of Influence** selected in the **How Secured** field.
   - When the **Center of Influence** option is selected, a new field called **COI Interviews** becomes available. Click the hyperlink field title to open a list of COI interviews from the current and prior month. Select the appropriate interview so it will be properly referenced in the RAM Report. The selected name will display in the **Potential Candidates** column and will be worth one point.
   - COI interview candidates will also be recorded in the nominator/center of influence's case history notes, keeping a running record of all the candidates they have nominated.
5. All subsequent face-to-face contacts with these nominators or centers of influence are recorded by repeating Steps 3 and 4 and by updating their **case history notes**.
6. Additional telephone contacts with nominators or centers of influence are recorded in their case history notes.

Step Five: How Can Preparations for the Next Month Be Made?

Monthly Planning Sessions are held on the third Friday of each month, allowing the recruitment manager to set the recruiting activity plan for the next month. The goal is to design a clear, scheduled plan of recruiting activity, and to make sure that no contact with candidates is overlooked. The **RAM Year-To-Date Report** is an important tool to be used in this monthly planning session.

1. All of the Potential Candidates and Candidates for the upcoming month are identified. Select **Current** from the **Summary View** drop-down list on the **Candidate/Recruit Summary** toolbar to access this list.
2. The Calendar is then updated with activities for all future calls or contacts scheduled. These would include calls and appointments with candidates or centers of influence.
3. Any other recruiting activities are scheduled for the upcoming month at this time.

Additional Considerations

- SmartRecruiting is similar to the sales process so that agents moving into a management or recruiting role will immediately be familiar with the system. They track potential advisors rather than potential clients.
- SmartRecruiting tracks the critical recruiting data in an intuitive visual manner. This helps foster a clear understanding of the "science" of recruiting for a specific agency or manager, which answers vital questions such as, "How many Potential Candidates are required in order to produce a contracted agent?"
- SmartRecruiting allows a recruiting manager to determine how many centers of influence are required to produce a specific name flow.
- SmartRecruiting reproduces the trusted 'paper and pencil' visual tracking of activities and produces a clear, useful management report.

A key benefit of the RAM Report© is that both the manager and agent are accountable for their activity in the same way. Both must post and plan daily and work toward the monthly goal of 100 balanced points, which maintains a consistent culture at all levels.

Reviewing the Interviews and Actions for a Stage from the Interview Tab

1. To display the related interviews and actions for each stage of a position, tag or otherwise open the record for a candidate being considered for that position.
2. Click the **Interview** tab. The stages that comprise the position are displayed in the Stages spreadsheet. By default, the interviews and actions that are associated with the stage the candidate is currently in are displayed in the Interview and Actions spreadsheets, respectively.
3. Each row of the Stages section has a **Get Stage** button located under the **Select** column. Click this button to see the interviews and actions for the corresponding stage. The interviews and actions will display in their respective list sections.

Reviewing the Interviews and Actions for a Candidate

1. Open the candidate record to the **Interview** tab.
2. By default, the interviews and actions shown are for the stage the candidate is currently in. If necessary, the user opens the interview and actions and the appropriate stage by clicking the **Get Stage** button on the corresponding row of the Stages section.
3. In the Interview section, click the row item hyperlink under the **Interview** column to open the Interview Detail dialog box for that interview. If complete, the Completed check box will be marked. The completion date, interviewer and evaluation are displayed in the **Completion Date**, **Interviewer**, and **Evaluation** fields respectively. Close the dialog box by clicking the **Cancel** button.
4. In the Actions section, click the row item hyperlink under the **Actions** column to open the Action Detail dialog box for that action. If complete, the Completed check box will be marked. The completion date is displayed in the **Completion Date** field. To review the document associated with the action, click the hyperlink in the **Document:** field. Close the dialog box by clicking the **Cancel** button.

Linking an Interview or an Action to an Activity

1. Tag the interview or action.
2. Click the **Link Activity** button. If there are no pending unlinked activities, the Activity Detail dialog box will open, allowing the user to create an activity that will be linked. If there are pending unlinked activities, the Interview or Action Activity Link dialog box opens. See the passages on these dialog boxes in the Screens section.
3. The link can be confirmed by tagging the interview or action again. The **Link Activity** button will have toggled to **Unlink Activity**.

Completing and Entering the Results of Interviews and Actions Without an Activity Link

1. Click the **Interview** tab for the candidate for whom to enter the results of a completed interview or action. By default, the stage should be the current stage the candidate is in. If the interview or action is not in this stage, click the **Get Stage** button on the row of the Stages spreadsheet that corresponds to the appropriate stage. The interviews and actions for this stage display in their respective spreadsheets.
2. To enter the results of an interview or action, open the Interview or Action Detail dialog box. To do this, click the row item hyperlink under the **Interview** or **Action** column corresponding to the interview or action.
3. When the Interview or Action Detail dialog box opens, click the **Completed** check box. The **Complete Date** field displays today's date automatically. If a different date is to be entered, click the **Pick Date** button to open the Calendar tool and use it to enter the date. To enter the interviewer, click the **Interviewer** field label link. When the list of users opens, the user who interviewed the candidate is selected by clicking the hyperlink in the corresponding row under the **Login Name** column of the list. An evaluation is selected from the Evaluation drop-down list. Click **OK** to close the dialog box.

Completing and Entering the Results of Interviews and Actions with an Activity Link

This can be performed by either marking the linked activity Done or by using the same procedure that would be used if the interview or action were not linked.

If the activity linked is marked Done, the Interview or Action Detail dialog box will open automatically. If the activity was tracked, it will open after the user completes the Activity Outcome Wizard.

If the user marks the interview or action Completed from the **Interview** tab, the activity linked will be marked Done automatically. If the activity is tracked, the Activity Outcome Wizard will open first. When the user completes the wizard, the Interview or Action Detail dialog box will open.

Marking a Stage Completed

Once the interviews and actions have been completed, it is time to mark the stage completed for the candidate record.

1. Open the **Interview** tab of the candidate record for whom to close the stage.
2. In the Stages section, click the row item hyperlink under the **Stage** column. This opens the Stage Detail dialog box.
3. When the Stage Detail dialog box opens, click the Completed check box. By default, the system automatically enters today's date into the Complete Date field. If a different date is to be entered, click the **Pick Date** button to open the Calendar tool and use it to enter the date. (Entering a date will also automatically enter a check in the **Completed** check box.)
4. To enter the evaluator, click the **Evaluator** field label link. When the list of users opens, the select the user who interviewed the candidate by clicking the hyperlink in the corresponding row under the **Login Name** column of the list.
5. Select an evaluation from the Evaluation drop-down list.
6. The status that the candidate was in during the stage is displayed in the Stage Status field. If necessary, change the status to more accurately reflect what it was during the stage.
7. The status that the candidate is currently in is displayed in the Candidate Status field. If the status is to change as a result of completing the stage, select the new status from the Status drop-down list.
8. The user must select one of three options as to the disposition of the candidate at this point. By default, the **Advance to Next Stage** button is selected, but the user may also select the **Advance to Selected Stage** or the **Do Not Advance** buttons. If the **Advance to Selected Stage** option is selected, select the stage to place the candidate in from the adjacent drop-down list. If **Do Not Advance** is selected, the candidate is not placed in any new stage, even though the current stage he/she is in is closed.
9. If there was testing involved, and the test scores were not already entered, the test scores may be entered into the Score 1 and/or Score 2 fields. Click the **Pick Date** button to open the Date Finder tool to enter the testing date in the field adjacent to the appropriate score field.
10. Close the dialog box by clicking **OK**.

Checking the Results of Precontract Activities and Milestones

Open the candidate record to the **Precontract** tab. License preparation periods and precontract curricula can be tracked from beginning to end in their respective spreadsheets. Overall completion of licensing, certification, and appointment (milestones) can be entered with dates in the Precontract Summary section. If the milestone has been completed, there will be a check mark in the **Complete** column in the appropriate row. There will also be a completion date in the field adjacent to the check box.

Entering Licensing Preparation Period Start and Finish Information

Once licensing preparation records have been created by assigning license types from the Setup to a position using the Position Setup Wizard, they display on the License Preparation Periods spreadsheet of the **Precontract** tab. Once a preparation period is finished, the user can enter the start and finish dates (note that both dates must be entered at the same time) for each preparation that applies to the candidate as follows:

1. Open the candidate record to the **Precontract** tab for the candidate for whom to enter the start and finish date of a licensing preparation period.
2. In the Licensing Preparation Periods section, click the row item hyperlink under the **License Type** column for the appropriate licensing preparation record to open the License Preparation Detail dialog box.
3. When the dialog box opens, enter both the start and finish date by clicking the **Pick Date** buttons next to the appropriate fields. The Date Selection tool is used to enter the dates.
4. Click **OK** to save the entries and close the dialog box.

Entering Precontract Curriculum Start, Finish, and Test Score Information

Once precontract curriculum records have been created by assigning curriculum types from the Setup dialog box to a position using the Position Setup Wizard, they display on the Precontract Curricula spreadsheet of the **Precontract** tab. Once a preparation period is finished, the user can enter the start and finish dates (note that both dates must be entered at the same time) for each preparation that applies to the candidate as follows:

1. Open the candidate record to the **Precontract** tab for the candidate for whom to enter the start and finish date of a curriculum.
2. In the Precontract Curriculum section, click the row item hyperlink under the **Curriculum Type** column for the appropriate precontract curriculum record. This opens the Precontract Curriculum Detail dialog box.
3. When the dialog box opens, enter both the start and finish date by clicking the **Pick Date** buttons next to the appropriate fields. The Date Finder tool is used to enter the dates. If a test score was involved, enter the score in the Score field.
4. Click **OK** to save the entries and close the dialog box.

Entering Licensing, Certification, and Appointment Completion Information

1. Open the candidate record to the **Precontract** tab for the candidate for whom to enter the start and finish date of a milestone. If necessary, click the **Switch to Edit Mode** button.
2. In the Precontract Summary section, click the **Complete** check box for the appropriate row. By default, the system automatically enters today's date into the Completion Date field. If a different date is to be entered, click the **Pick Date** button to open the Calendar tool and use it to enter the date. (Entering a date will also automatically enter a check in the **Completed** check box.)
1. Click **Save**.