SmartRecruiting
User Guide

Smart Office®

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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 enables management to always know the status of candidates so that none are 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.

- Straightforwardness, cost-effectiveness, and ease of reporting.

SmartRecruiting Setup

Conceptual Framework

SmartRecruiting is extremely adaptable to a wide variety of recruiting scenarios from small single-office operations to enterprise-wide campaigns for large corporations. Before beginning the actual setup, take some time to consider all the components of your recruiting process and the kind of reporting that will need to be performed. This will help make the best use of the available setup options.

The conceptual framework of SmartRecruiting is based on modularity and interoperability. With this in mind, let it be clearly understood that although there are sometimes predefined elements of the recruiting process provided as samples by E-Z Data, you are in no obligation whatsoever to use them. You may use any such positions in their entirety, copy and modify them to suit your needs, or create new positions that use some, all, or none of their constituent elements. If needed, your setup may be composed 100% of elements uniquely created by you or your company. The system allows a generous number of elements that may be in a position, and number of positions that may be created.
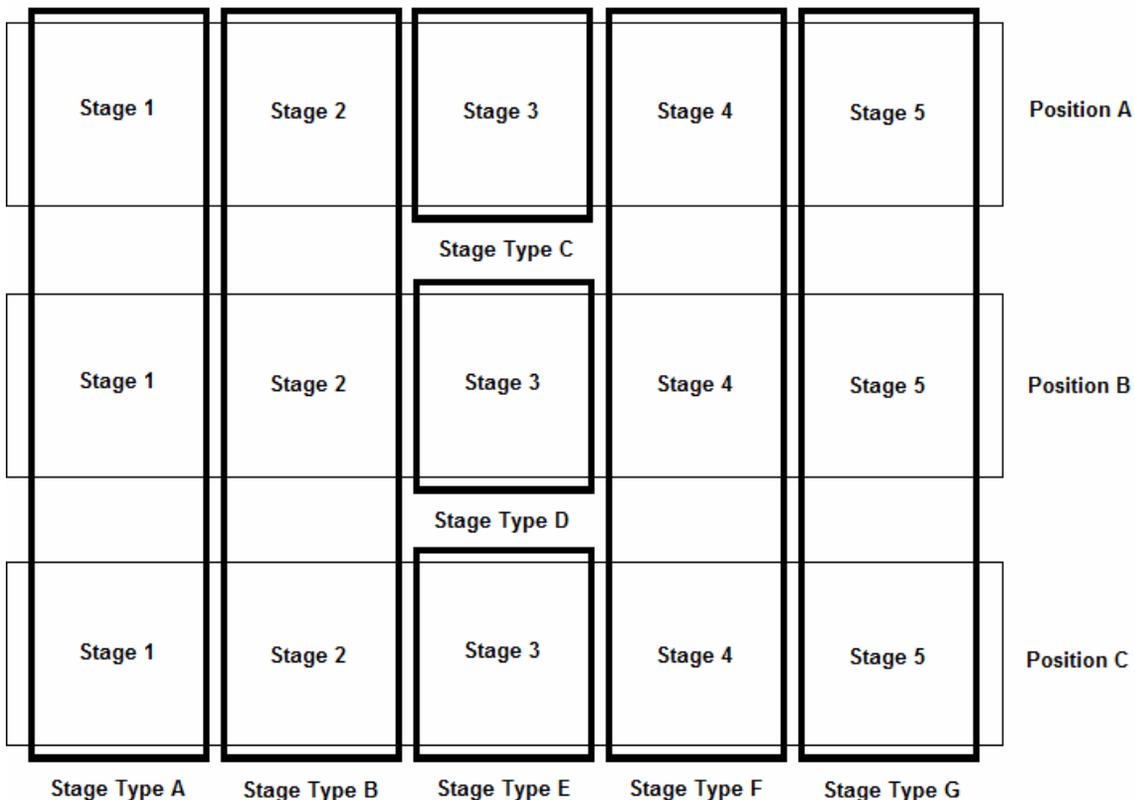
Positions

The primary unit of organization is the position. The position record contains the definition of the overall process of recruiting candidates for the position to be filled. Positions are subdivided into stages, and within each stage are actions and interviews that must be completed. Additionally, a position may also include a list for tracking of license preparations periods (usually referred to simply as licenses) and precontract curricula that must be completed. When defining a position, the user draws from a list of stage types, action types, and interview types that were previously defined.

Stages

The stage is the secondary unit of organization, and as stated, is drawn from a pre-existing list of stage types. The reason for this subtle differentiation is that positions that have stages drawn from the same stage type enable the user to run reports on the number of candidates in those particular stages (drawn from the common stage type) without interference from the positions. In other words, this allows for "unified pipeline" reporting within SmartOffice's Dynamic Report system across positions.

To further illustrate this concept, assume that your company is recruiting for three positions, A, B, and C. Management wants unified numbers on stages 1, 2, 4, and 5 of each position as these are the beginning and ending stages, but the 3rd stage of each has such unique requirements that management does not want the numbers on these stages combined. Stages 1, 2, 4, and 5 can therefore be based on common stage types. For example, Stage 1 of each position can be based on Stage Type A, Stage 2 can be based on Stage Type B, etc. Stage 3 in each, however, is drawn from stage types that are not used in any other position. The image below illustrates this setup.


A stage cannot be drawn from a stage type more than once per position.

Interviews and Actions

Interviews and actions are the most basic elements of the position workflow. As with stages, the interviews and actions are drawn from predefined interview and action types. The reason for this is that many interviews and actions are common occurrences that are repeated in other stages and/or positions, so it makes sense to define each only once.

Each stage has a unique assignment of interviews and actions within it, even if a stage in another position is drawn from the same stage type. An interview or action can be drawn once per stage in all positions. The way that interviews and actions are contained within the stages of a position is illustrated below.
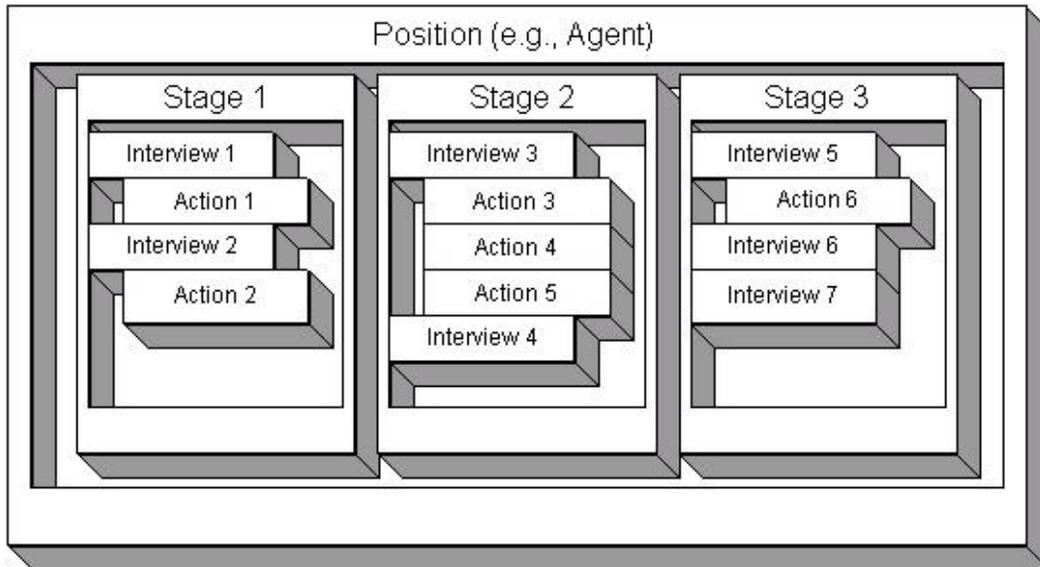

Notes for Enterprise View/Office Hierarchy Users

The main position workflows and their components will generally be created at the Home Office by Home Office personnel, but these workflows and components can also be created at intermediate 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. Home and intermediate office position workflows can also be copied and then customized at the individual office level, if there is such a need. If such 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

SmartRecruiting eases the tracking of the recruitment process by providing the SmartRecruiting Setup dialog box where all the prerequisites for a position can be defined. These are Positions, Stages, Interviews, Actions, Licenses, and Curriculums.

The SmartRecruiting Setup dialog box is available from the Recruitment Tracking side menu if the user has the Recruiter Setup Administrator role.
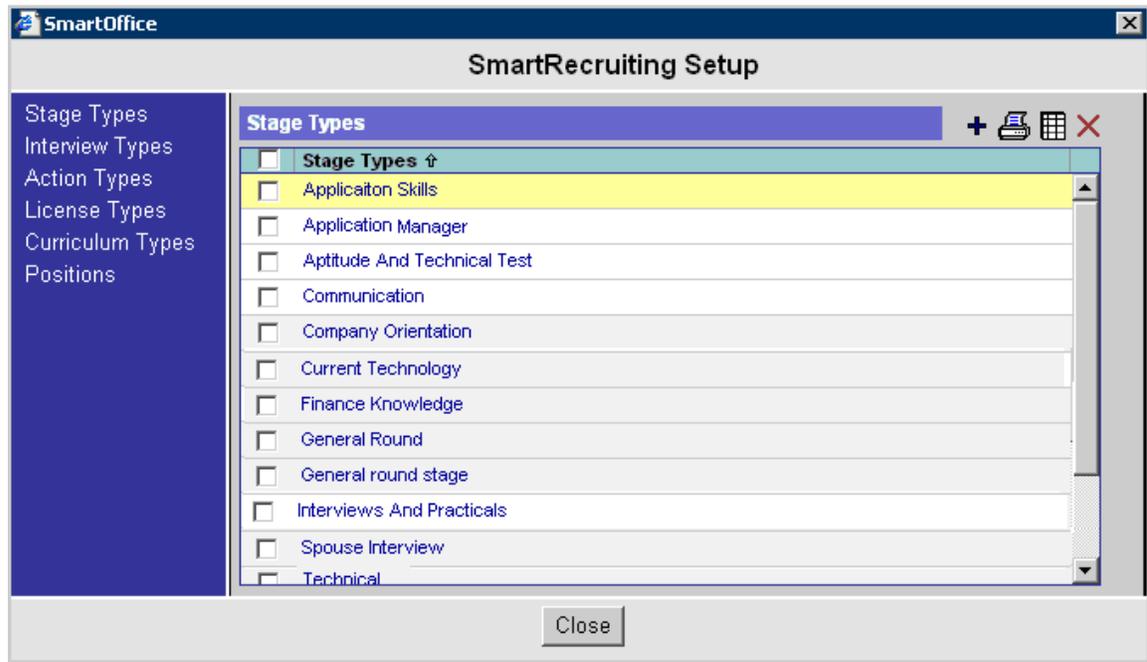
The dialog box consists of the following spreadsheets:

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.

Setup Procedure

1. Select **Setup** from the expanded **Recruitment Tracking** menu.
2. When the Setup dialog box opens, select **Stage Types** from its side menu if not already selected.

3. Click the **Add** button to add a stage type record. When the Stage Type - New dialog box opens, enter the name of the stage type into the Stage Name field and then click the **OK** button. Repeat this step until all needed stage types are added.
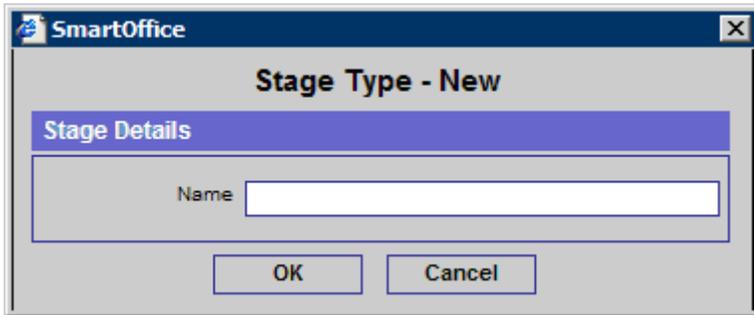
4. Select **Interview Types** from the Setup dialog box's side menu.
5. Click the **Add** button to add an interview type record. When the Interview Type - New dialog box opens, enter the name of the interview type into the Name field and then click the **OK** button. Repeat this step until all needed interview types are added.

6. Select **Action Types** from the Setup dialog box's side menu.

7. Click the **Add** button to add an action type record. When the Action Type - New dialog box opens, enter the name of the Action Type into the Name field and then click the **OK** button.

   Action Document section:

   - The default setting under the Action Document section is **Do not link a document**, but if the Action involves a document, select another document link option as appropriate.

   - To specify the path of the document stored locally, select the **Link with a document on the local file system** option and then click the **Browse** button to open the Choose File dialog box. Select the appropriate file and then click the **Open** button.

   - To embed a document, select the **Upload the document to the server** button and then click the **Browse** button.

   - If the document can be accessed from the Internet or intranet using HTTP (the Web), select the **Save a link to an Internet/Intranet document** option and then enter the URL in the accompanying field. When the Choose File dialog box opens, locate and select the document and then click the **Open** button. In all cases, click the **OK** button to save the action type. This step is repeated until all needed action types are added.

   - If new documents are attached to the existing Actions, this is reflected for the existing candidates as well.

8. Select **License Types** from the Setup dialog box's side menu.

9. Click the **Add** button on the License Types toolbar to add a license type record. When the License Type - New dialog box opens, enter the name of the license type in the License Type field and then click the **OK** button. Repeat this step until all needed license types are added.
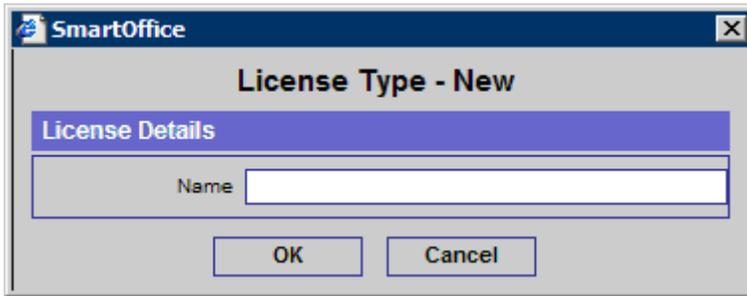
10. Select **Curriculum Types** from the Setup dialog box's side menu.

11. Click the **Add** button to add a curriculum type record. When the Curriculum Type - New dialog box opens, enter the name of the curriculum type into the Curriculum field and then click the **OK** button. Repeat this step until all needed curriculum types are added.
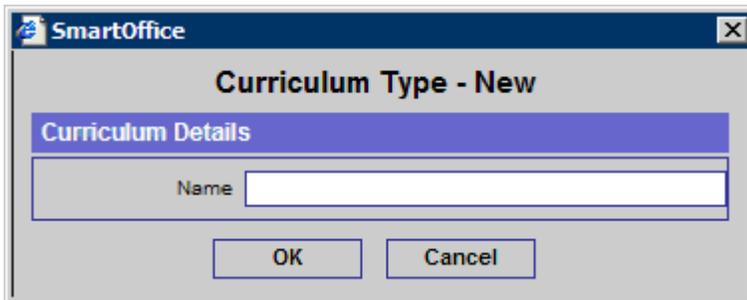
12. In the Setup dialog box, select **Positions**.

13. Click the **Add** button 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 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.

The Position Setup Wizard contains four main steps:

a. Select Position – Step 1 of 4

b. Select and Order Stages for the [Position Name] Position – Step 2 of 4

c. Select Interviews and Actions for Each Stage – Step 3 of 4

- Step 3 of 4 consists of two additional dialog boxes that open when the first column hyperlink is selected in the Relationships section and then the Switch to Edit Mode button is clicked.

d. Select License Types and Curricula for the [Position Name] Position – Step 4 of 4

Position Setup Wizard Procedure

1. Click the **Add** button on the Positions spreadsheet to open the Position Setup Wizard.

2. Enter the name of the position into the Name field of the Select Position dialog box. Enter a short description of the purpose of the position workflow in the Description field. 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 adding a Candidate into this position workflow. When the candidate is hired, the contact type will change to Manager or Staff as selected. Click the **Next** button.

3. When the Select Stages in Order screen opens, the stage types previously added are displayed in the Stages Available column.

4. Select the first stage to be used in the position from the Stages Available column and then click the **Right Arrow** button to move it to the Stages Selected column. Continue in a similar manner until all of the stages have been selected. A stage cannot be selected more than once per position. The stages will be placed in the order selected from top to bottom. A stage's order may be changed by selecting it and then using the Up and Down arrow buttons to change the order if necessary. Click the **Next** button.

5. Step 3 of 4 displays a list with four default columns: Stage, Interview, Action, and Goal (Days).
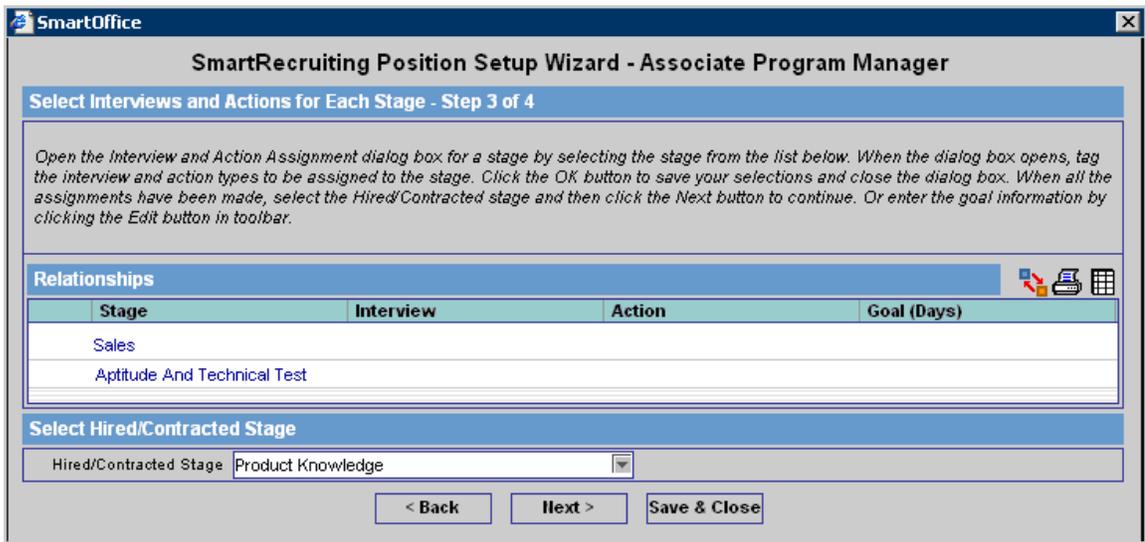
6. The spreadsheet is populated with rows representing the stages selected in the previous step. Click the row hyperlink under the stage column to add interviews or actions to the stage if needed. (Note: It is not required to add interviews or actions to any stage, but not doing so may severely diminish the functionality the module provides.) This will open the Interview and Action Assignment dialog box for the selected Stage.
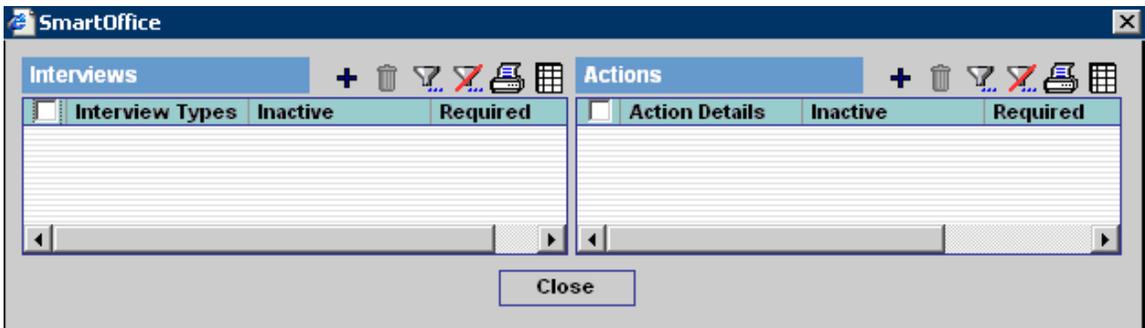
7. The Interview and Action Assignment dialog box consists of two spreadsheet lists, Interviews and Actions. Assign an interview by clicking the **Add** button to open the Interview Types dialog box.
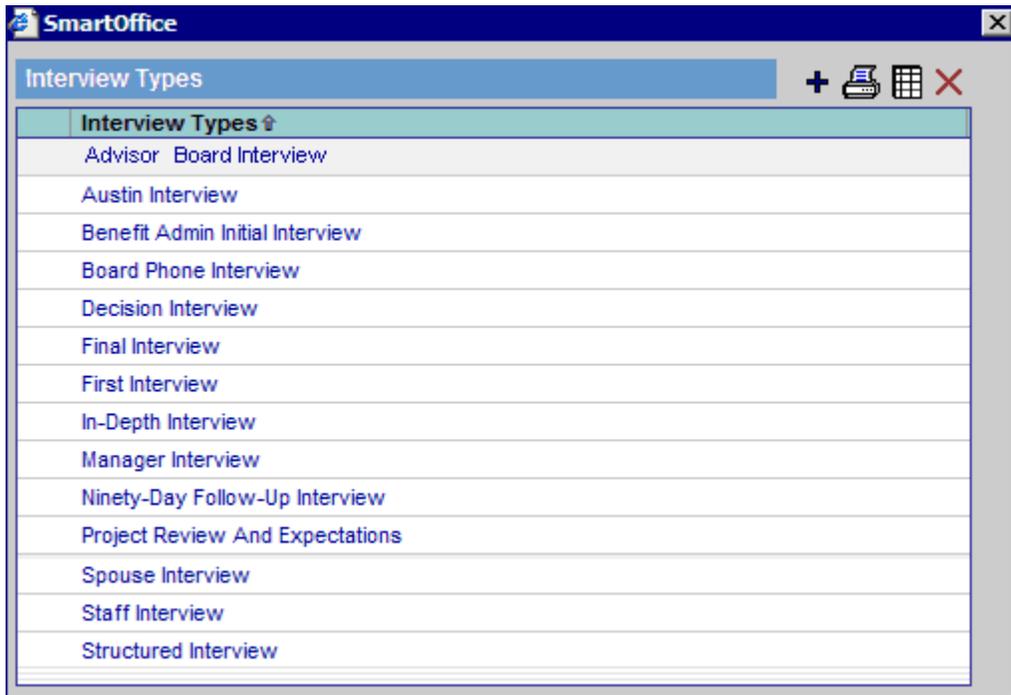
8. The spreadsheet displays all of the interview types that have been previously created. Select an interview to be included in this stage by clicking on the corresponding hyperlink. This will close the Interview Types dialog box and open the Interview Details dialog box, displaying the name of the selected interview.
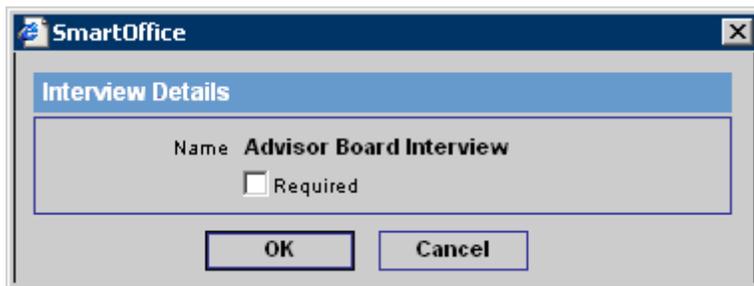
9. Select the **Required** option if this interview is a required step of the stage. A required interview means that the stage will not be able to be completed unless the interview is marked as Completed. Click the **OK** button to finalize the selection.

10. Repeat Step 4 as needed for each stage, and apply the same process to adding actions.
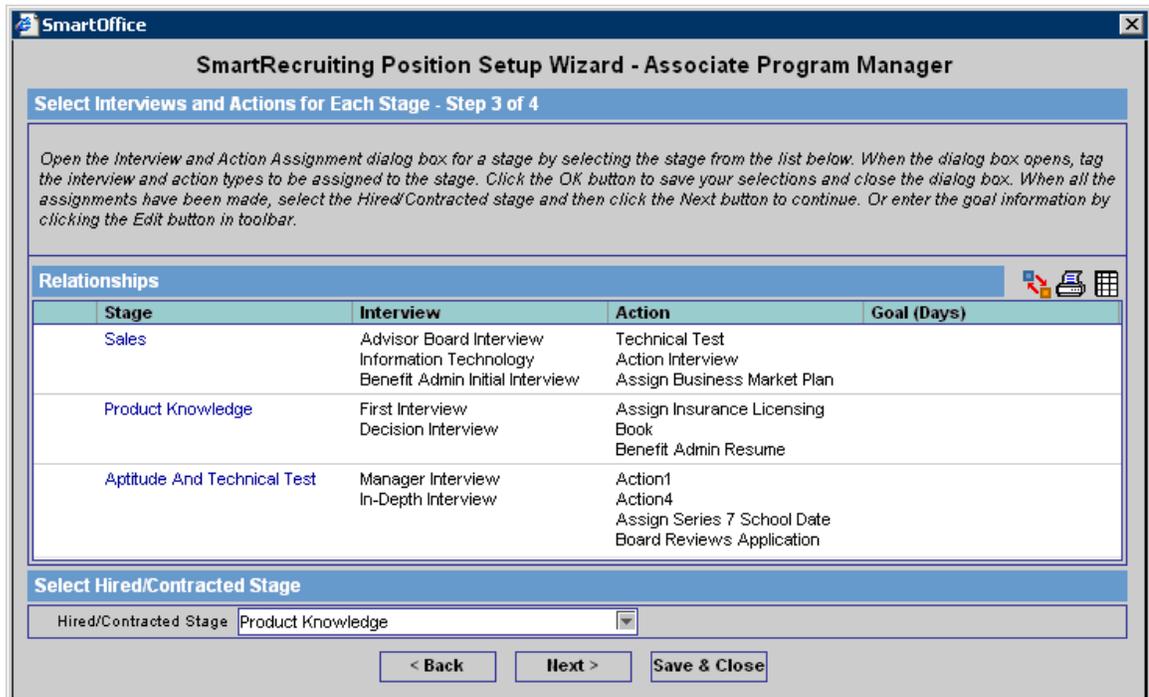
11. Once the Interviews and Actions are selected for all stages of the position, click the **Switch to Edit Mode** button to open the Goals dialog box that displays all of the stages with their respective interviews and actions.
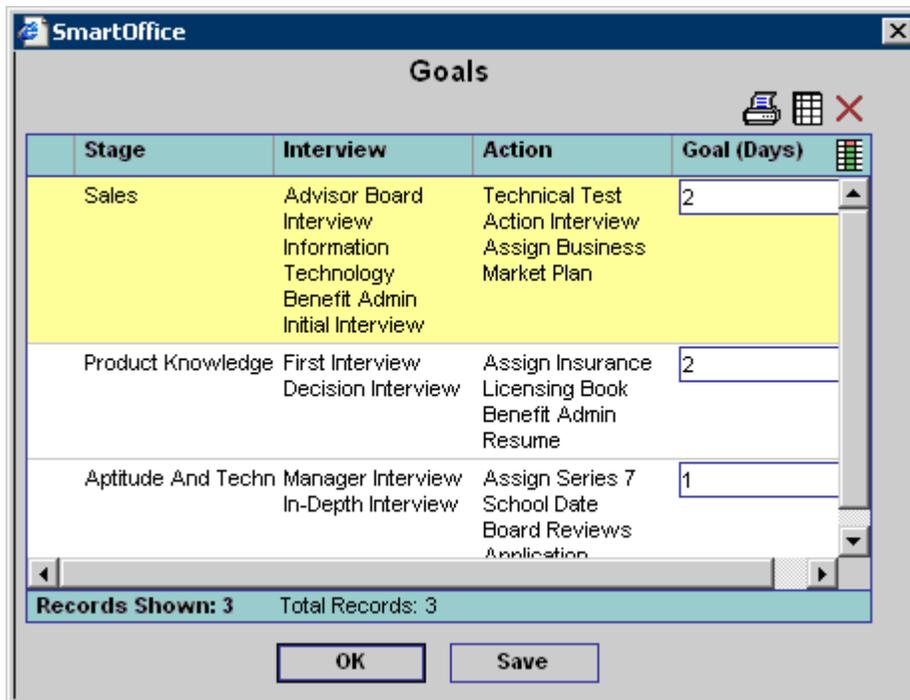
12. Enter the value in the editable Goal field to specify the days in which each stage needs to be completed and then click the **OK** button.

13. The result of setting the Goals is displayed on the Interview/Action tab of the candidate in the Goal Achieved column as shown in the image below. If the Goal is achieved within time, it displays Yes; otherwise, is displays No.

Stages		
☐	**Stage**	**Goal Achieved**
☐	Sales	Yes
☐	Product Knowledge	No

14. Click the **Next** button to open the Step 4 of 4 dialog box.
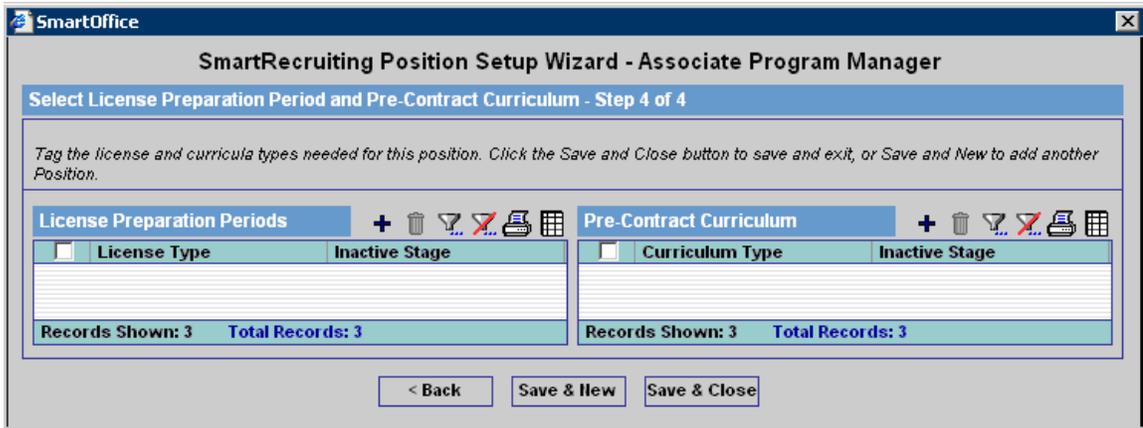
15. Step 4 of 4 consists of two spreadsheet lists, License Preparation Periods and Pre-Contract Curriculum. If any license preparation periods or curricula need to be associated with the position, add them here. Periods and curricula added here are displayed on the Precontract tab of those Candidates in this Position. To add, click the **Add** button in the appropriate toolbar. In the case of License Preparation Periods, this opens the License Types dialog box.
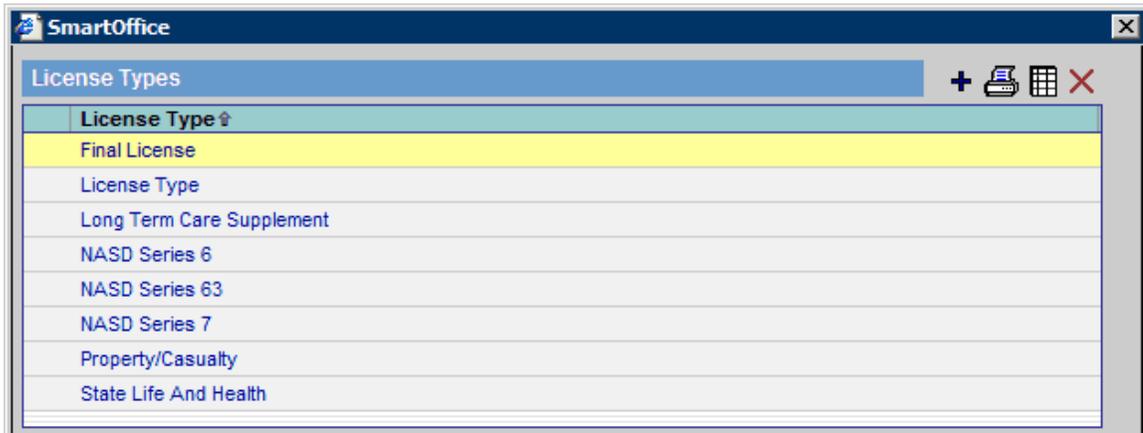
16. Select a License Type. This will close the dialog box and the selected License Type will be added to the list. Perform the same steps for adding Curriculum Types.
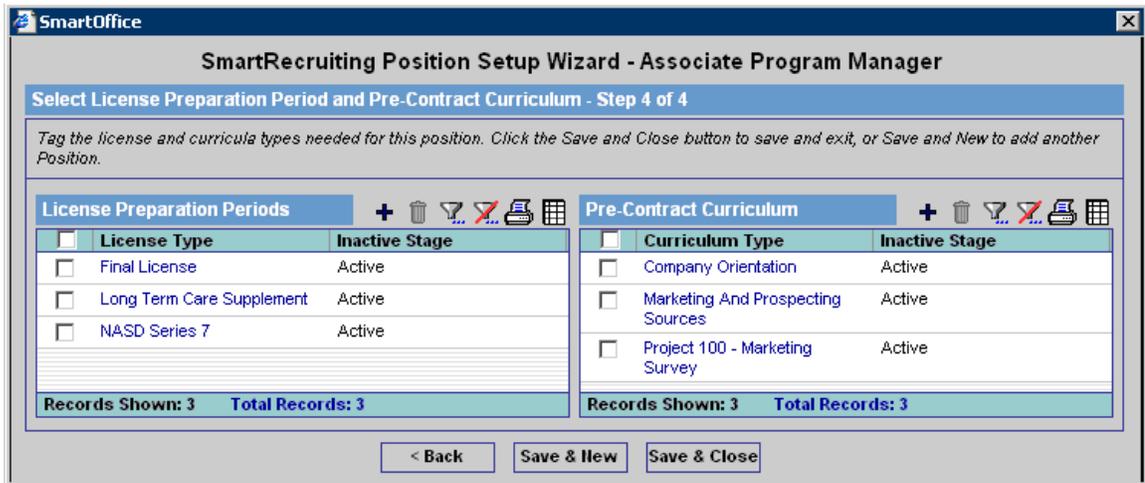
17. Click the **Save & Close** button to save these relationships for this position; or, click the **Save & New** button to return to Step 1 of 4 to repeat the process for another position.

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 either added as Advisors with a Candidate status, or as Contacts as determined by the position workflow assigned to them at that time. However, Candidates have their own Search, Summary, and Detail sections when SmartRecruiting is present. Select **Candidate Search** from the expanded **Recruitment Tracking** menu to open the Candidate/Recruit Search dialog box.
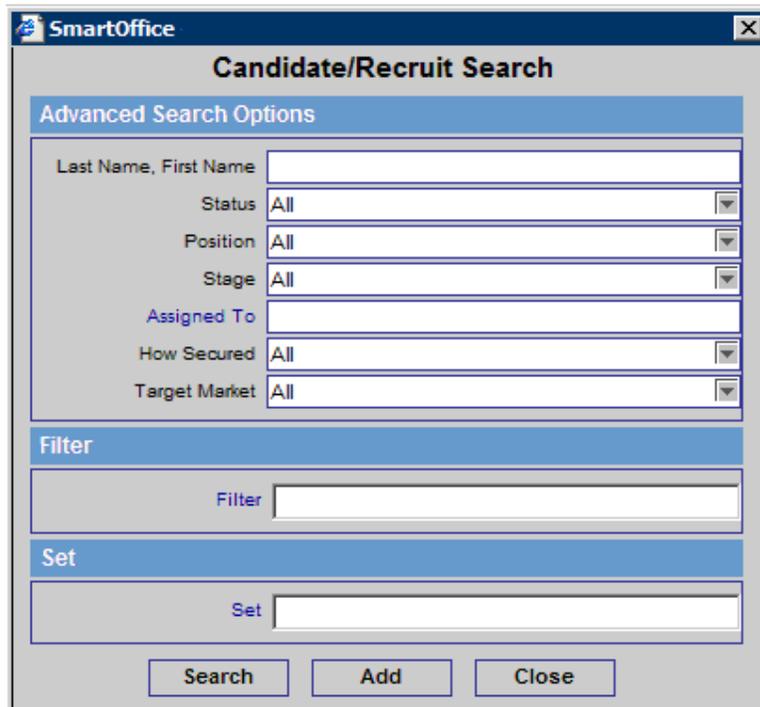
The interface for candidate records is similar to the interface for individual contact records, but with a significant difference: a position must be selected for each candidate record being added.

The candidate is automatically placed in the first stage of the position when added. The Interview/Action tab 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, mark stages as complete, and e-mail the documents/URLs attached to Actions.

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 completed automatically and all required actions and interviews are completed. The status of the advisor or contact record then automatically changes to Active.

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 to identify if enough recruiting time is being booked.

RAM Monthly Report

Recruiting Activity Management (RAM) Report for the Month of May for Position

Month/Year 05/23/2004 [←] [→]   [Print]

			Potential Candidates							Recruiting Activity										Activity Summary						
No.	Date	Name	Nominator	How Secured	Age	Income [000]	Occupation	To Be Contacted		Stage 1		Stage 2		Hired/Contracted				Date	Appts Made	Appts Kept	COI Interviews		Cand.	Interv.	Tot. Pts.	
								Date	Name	Date	Name	Date	Name	Date	Name	How Secured				Name	Result				
1	25	Smith, M.	Agent Referrals	<1				25	Smith, M.	24	Smith, M.	24	*Kerry, O.	25	Kerry, O.	Agent Referrals	1							0
2	25	Kerry, O.	Agent Referrals	<1				25	Kerry, O.	24	Kerry, O.	25	*Narezhnaya	25	Narezhnaya,	Agent Referrals	2							0
3	25	Harvey, G.	Agent Referrals	<1				25	Harvey, G.	24	Narezhnaya,	25	*Smith, M.				3							0
4	25	Ignacio, E.	Agent Referrals	<1				25	*Ignacio, E	24	Patel, E.	25	*Patel, E.				4							0
5	25	Gonzales, U	Agent Referrals	<1				25	*Gonzales,	25	*Harvey, G.						5							0
6	25	Chong, T.	Agent Referrals	<1				25	Chong, T.	25	*Chong, T.						6							0
7	25	Valdez, L.	Agent Referrals	<1				25	Valdez, L.	25	*Valdez, L.						7							0
8	25	Narezhnaya,	Agent Referrals	<1				25	Narezhnaya,								8							0
9	25	Patel, E.	Agent Referrals	<1				25	Patel, E.								9							0
10	25	Dinkins, O.	Agent Referrals	<1				25	*Dinkins, O								10							0
11																	11							0
12																	12							0
13																	13							0
14																	14							0
15																	15							0
16																	16							0
17																	17							0
18																	18							0
19																	19							0
20																	20							0
21																	21			Benjamin	0			1
22																	22							0
23																	23							0
24																	24						10	10
25																	25							0
26																	26							0
27																	27							0
28																	28							0
29																	29							0
30																	30							0
31																	31							0
Tot.							10	Tot.	10	Tot.	7	Tot.	4	Tot.		2	Tot.	0	0		1	0	10	0	11

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
    - A center of influence interview displays on the Monthly RAM Report if the COI name is selected for the Nominator field while adding a candidate and COI Date specified.
- 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.

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.

The RAM Year to Date Report

Recruiting Activity Management (RAM) Report
Year-To-Date Summary for the Advisor Position

Activity Category	YTD Total	Monthly Avg.
Potential Candidates	37	12.333333
To Be Contacted	38	12.666667
First Interview	27	9.0
In-Depth Interview	21	7.0
Career Interview	16	8.0
Spouse Interview	11	5.5
Final Interview	9	4.5
Offer	6	6.0
Hired/Contracted	3	3.0
Contracts/Hires	5	5.0
Appointments Made	59	14.75
Appointments Kept	56	14.0
Center Of Influence Interviews	0	0.0
Candidates from COI Interviews	4	1.3333334
Total # of Selection Interviews	61	15.25

Sources Of Contracts/Hires	YTD Total
Agent Referrals	1
Centers Of Influence	1
Nominators	1
Internet	0
Personal Observation	0
Other Sources	0
Unknown	2

Print   Close

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)

In the bottom pane, the report lists the 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?

- Create a record for the candidate. Set the status as **Potential Candidate**.
- Schedule a call activity in the Calendar some time in the next 30 days. This action is part of the first stage and the call should be linked to this action.
- Actions can be mass assigned using the Mass Action Assignment button. To Do activities are created automatically for the actions after user assignment for each action is performed. However, if these To Do activities are not required, then at anytime they can be unlinked from the Actions.
- The candidate's name displays in the Potential Candidates column of the current month's page in the Monthly RAM Report©.
- The qualifying information is recorded in the appropriate columns:
  o Nominator's Initial - If the candidate is nominated
  o How Secured - (Agnt) Agent Referral, (PO) Personal Observation, (Nom) Nominator (COI) Center of Influence (NET) Internet (O) Other
  o Occupation

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

- 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**.
- 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**.
- If the candidate agrees to an initial interview or to take the first selection test, then:
  o Mark the call linked to the action as **Done**. Complete the first stage and advance the candidate to the next stage.
  o The next stage should include the interview or action corresponding to an interview or examination to be administered. Create an appointment activity and then link it to the interview or action.

- If the candidate passes the test or completes a satisfactory initial interview, the candidate status is manually changed from Potential Candidate to Candidate.
  - o 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). Note that the To Do activities linked to Actions do not open any outcome wizard.
  - o Change the status to **Candidate**.
  - o Create an activity for the next interview or action and link it appropriately.
  - o The actual test, results page, and/or notes from the initial interview are also placed in the file.
- For the second interview or test, repeat the previous process.
  - o Record the details of the next interview or test in appropriate subsequent stages.
  - o The name and date of the meeting is recorded in the corresponding Stage column of the current month's RAM Report page.
  - o 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?

- When an event is complete, points are assigned immediately and are recorded in the right hand column of the RAM Report© Booklet.
- Points are assigned for each of the following activities:
  - o One point for a new name or Potential Candidate.
  - o One point for completing a face-to-face interview or test with a Potential Candidate.
  - o One point for each face-to-face interview with a center of influence.
- 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.
  - o Depending upon name sources, about 40 names a month are required to obtain 20 initial interviews (which would yield 60 points).
  - o 15 initial tests add 15 additional points for a total of 75 points.
  - o Ten in depth interviews add 10 more points for a total of 85 points.
  - o 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.
  - o Based on the figures above, a 100-point month would create one to two contracts per month.
- 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?

Adding candidate records obtained from COI Interviews:

When names of centers of influences are acquired, record them in the Individual Contact section.

1. Each referral is entered as a Potential Candidate, with **Centers Of Influence** selected in the How Secured field.

2. When the **Center of Influence** option is selected, the COI Interviews and Nominator fields are displayed.

3. Click the **Nominator** hyperlink to open a list of Individual Contacts from where the COI name earlier entered in the Contact section can be selected. Select the appropriate COI name so it will be properly referenced in the RAM Report. Click the COI Interviews field **Pick Date** button and then select the Interview Date. The selected name will display in the Potential Candidates column on the specified COI Interviews Date and will be worth one point. Note that the point for the added candidate will be displayed on the date that the candidate is added.

Points for COI

1. When the name of the nominator/center of influence displays in the Activity Summary section of the Monthly RAM Report©, one point is earned.

2. If new referrals were obtained, the number of new referrals obtained displays in the Results column.

All subsequent face-to-face contacts with these COIs are recorded by repeating Steps 3 and 4.

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

Monthly Planning Sessions are held on the third Friday of each month, enabling 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. Identify all of the Potential Candidates and Candidates for the upcoming month.
2. Select **Current** from the Summary View drop-down list on the Candidate/Recruit Summary toolbar to access this list.
3. Update the Calendar with activities for all future calls or contacts scheduled. These include calls and appointments with candidates or centers of influence.
4. Schedule any other recruiting activities 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 enables 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.
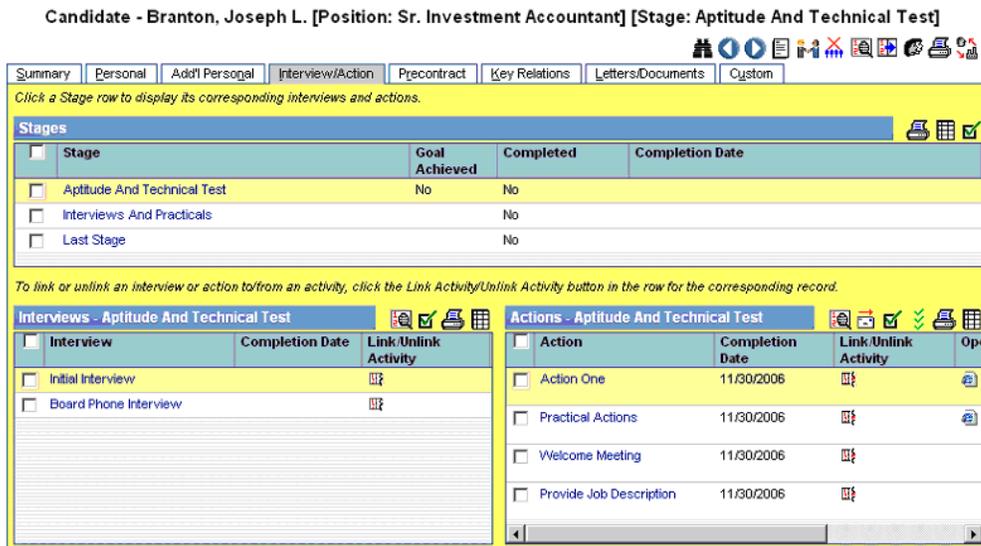
Reviewing the Interviews and Actions for a Stage from the Interview/Action Tab

The Interviews and Actions can be completed by selecting the Completed option in the Interview and Action dialog box.

Another option to complete the interviews and actions is to select the record to be completed and then click the **Mark Done** button. This will complete the interview or action selected.

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/Action** 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 sections, respectively.

3. Click the Stage row to see the interviews and actions for the corresponding stage. The interviews and actions of the stage will display in their respective list sections.

Reviewing the Interviews and Actions for a Candidate

1. Open the candidate record to the **Interview/Action** tab.
2. By default, the interviews and actions shown are for the stage the candidate is currently in.
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 option 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.
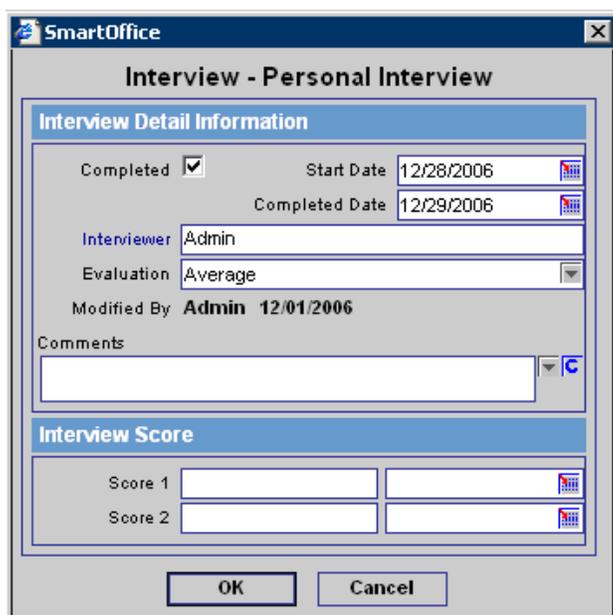
4. In the Actions section, click the row item hyperlink under the Actions column to open the Action Detail dialog box for that action. If complete, the Completed option will be marked. The completion date is displayed in the Completion Date field. To review the document associated with the action, click the **Open** hyperlink in the Open Document: field. Close the dialog box by clicking the **Cancel** button.

Sending Mail

Select the Action to which the document/URL is attached and then click the **Send Mail** button in the Actions section. E-mail will be sent to the e-mail address specified for the candidate.

Mass Action Assignment

Actions can be mass assigned by clicking the **Mass Action Assignment** button in the Actions section. This opens the Mass Action Assignment dialog box displaying all Actions that are not complete.
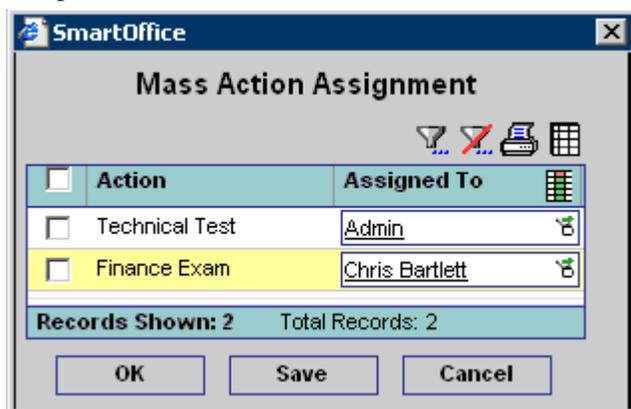
1. Click the hyperlink in the Assigned To field to open the Available users dialog box listing the users in the office.
2. Select the appropriate user hyperlink to populate the selected user name in the Assigned To field.
3. Click the **OK** button to close the Mass Action Assignment dialog box and automatically create and link a To Do activity for the Action for which the assignment was made.

Linking an Interview or an Action to an Activity

1. Open the Interview/Action tab of the candidate for whom you have activities you want to link to an interview or action. Make sure the tab is displaying the interviews and actions for the correct stage by the row of the stage in the Stages spreadsheet.

2. Click the **Link Activity** button. If there are no pending unlinked activities, the Activity Detail dialog box will open, enabling 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.

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/Action** 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 **Stage** row on 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 Detail dialog box opens, select the **Completed** option. The Start Date and Completed Date fields automatically display today's date. 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. The current user name is automatically displayed in the Interviewer field when the Completed option is selected. To enter another interviewer, clear the Interviewer field and then click the **Interviewer** field hyperlink. 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. Select an evaluation from the Evaluation drop-down list. Click the **OK** button to close the dialog box.

   Similar is the process for completing an Action; the only difference is that instead of an Interviewer field, there is an Assigned To field in the Action Detail 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 as 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 as 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 as Completed from the Interview/Action tab, the linked activity will be marked as 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 as Completed

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

1. Open the **Interview/Action** tab of the candidate record for whom to close the stage.

2. There are two ways to mark a stage complete.

   - One is to select a stage and then click the **Mark Done** button. This does not require that the interviews and actions be completed before doing this. On the other hand, it automatically completes the interviews and actions when a stage is completed.

- The second way is to complete a stage as follows:

    a. In the Stages section, click the row item hyperlink under the Stage column to open the Stage Detail dialog box.

    b. Select the Completed option. By default, the system automatically enters today's date into the Start Date and Completed Date fields. 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 select the Completed option.)

3. The current user name is selected automatically when the Completed option is selected. To enter another evaluator, clear the Evaluator field and then click the **Evaluator** field hyperlink. When the list of users opens, select the user who interviewed the candidate by clicking the hyperlink in the corresponding row under the Login Name column.

4. Select an evaluation from the Evaluation drop-down list.

5. 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.

6. The status that the candidate is currently in is displayed in the Candidate Status field. If the status is to change because of completing the stage, select the new status from the Status drop-down list.

7. 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 completed.

8. 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 Selection tool to enter the testing date in the field adjacent to the appropriate score field.

9. Close the dialog box by clicking the **OK** button.

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 fields adjacent to the checkboxes.

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, 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 column for the appropriate licensing preparation record to open the License Preparation dialog box.

3. 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. Select an evaluation, evaluator, and test scores and dates if necessary.
5. Click the **OK** button 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 column for the appropriate precontract curriculum record to open the Curriculum dialog box.

3. 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. If a test score was involved, enter the score in the Score field.

4. Click the **OK** button 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, select the **Complete** option 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 Date Selection tool and use it to enter the date. (Entering a date will also automatically select the Completed option.)

3. Click the **Save** button.

Adding a Reason and Follow-ups when Rejecting a Candidate or Converting a Candidate to a Contact

A follow-up activity is created and a record is maintained listing the reasons for which the candidate was rejected in the SmartPad.

1. Select a candidate and then click the **Reject** button to open the following dialog box.
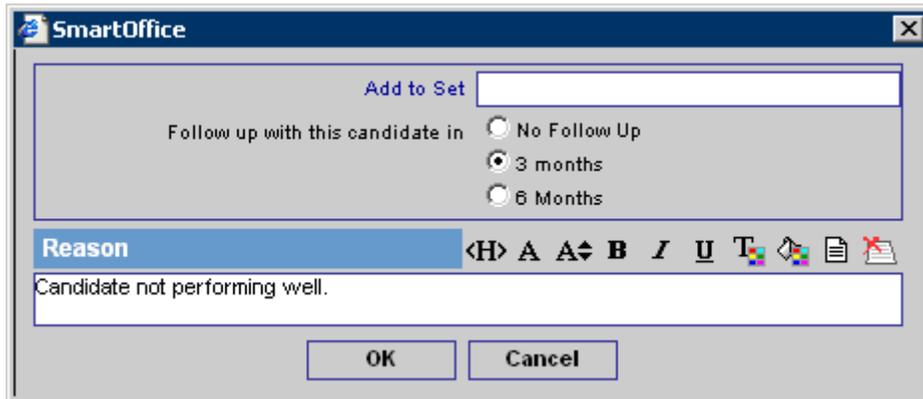
- The rejected candidate can be added to the Candidate set.
- A follow-up activity can be created by selecting the 3 or 6 Months options.

2. Add the Reason for the rejection and then click the **OK** button. The activity and reason are available in the SmartPad of the rejected candidate. The activities can be seen from the Activity Log of the candidate.

	Memo Date↓	Memo Time	Type	Open Link	Notes
☐	01/16/2007	06:14PM	Notes		Candidate not performing well.
☐	01/16/2007	06:14PM	Activity	📧	Call was scheduled for 04/16/2007 (Active)

Similar functionality is available when converting a candidate to a contact. The only difference being that the Set type is Contact.

Converting a Candidate to a Contact and Vice-versa

A candidate can be converted to a contact record instead of maintaining it in the Candidate Summary.

1. Select a Candidate and then click the **Convert to Contact** button to open a Confirmation dialog box.
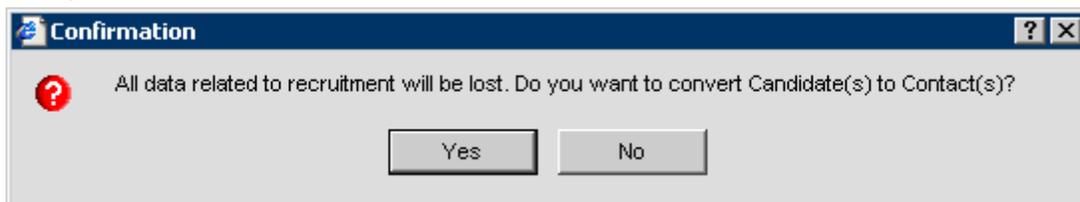
2. Click the **Yes** button.
3. Enter the Follow-up details and then click the **OK** button.

Convert a Contact to a Candidate

1. From the Contact Summary, select a contact and then click the **Convert to Candidate** button to open the Convert Contact to Candidate dialog box.

2. Select the contact name from the contact name section and then enter the assignment in the Assigned To field. Change the selections for Position, Status, and How Secured according to the requirement.
3. Click the **OK** button to open a Confirmation dialog box.
4. Click the **Yes** button to convert the Contact to a Candidate.