

## User Guide

# **Candidate Record Card**

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Strictly Commercial in Confidence





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#### 1. Candidate Record Card Overview

The Candidate Record Card contains comprehensive details of the candidate's application.

The Record Card allows the recruiter to:

- Instantly view the candidate's current status and contact details
- View the completed online application form
- View additional forms including references
- Access candidate files (e.g. CV) and upload files related to the candidate
- View additional forms (inc referees)
- View the audit trail of the application's history
- View & add application notes
- View any additional applications for other vacancies made by the candidate
- Progress a candidate to the next stage of the recruitment process
- Reject a candidate from the recruitment process

#### 2. Open a Candidate Record Card

To access the Record Card:

- 1. Click anywhere on the candidate's row to access the options bar
- 2. Click Card

reach ATS Dashboard Candidates Vacancies Libraries Talent Bank Preferences 👙 Sign Ou Reports 🚜 Active Candidates 🛛 🍃 Incomplete Candidates 🖉 🤤 Rejected Candidates 🛛 💐 Withdrawn Candidates 🖉 🖲 Candidates On Hold Sandidate Listing - Procurement Administrator [ID: 25778] Q Car Job Selection 🔚 Screen 10 🎎 Shortlist 1 🖉 Interview 7 👶 Offer 0 🖹 Contract 2 💩 Appointed 0 😂 Onboard 0 Candidate App ID Application Date Location Grade Score Stage 
 Ayesha Gupta
 577457 Im ≤
 2/207/2013 10.38AM
 Cosford
 ★★★★★
 75%
 Screening

 Adil Singh
 577459 Im ≤
 2/207/2013 10.29AM
 Wolverhampton
 ★★★★★
 100%
 Screening
 577460 🗐 🚨 22/07/2013 10:22AM Wolverhampton \*\*\* T5% Screening Tom Jones \*\*\*\* 100% Screening 577461 🗐 🖁 22/07/2013 10:20AM Stourbridge Shelly Cutler Sharon Mason 577468 🔄 🖁 22/07/2013 10:11AM Shirley \*\*\*\* 100% Screening 🖭 Card I 🖻 Rec Forms I 🛩 Progress 🤤 Reject 💁 Withdraw 💿 Hold I 🖂 Email I Grade : -Delia Smith 577464 🗐 🚨 22/07/2013 10:04AM Wolverhampton \*\*\* 75% Screening \*\*\* 50% Screening 577465 🗐 🚨 22/07/2013 09:59AM Wombourne Amy Taylor 577469 🗐 🚨 22/07/2013 09:55AM Pattingham Ryan Mcbride \*\*\*\* 100% Screening Diane Millard 577467 📃 🚨 22/07/2013 09:51AM Kidderminster \*\*\*\* 75% Screening ★★★★★ 50% Screening Harry Brown 577470 🗐 🚨 22/07/2013 09:49AM Bilston

Figure 1: Open the options bar to access the Card button

The record card will open in a new tab.



#### 3. Current Status Tab

The Current Status tab of the record card shows:

- The current stage of the candidate's application
- The next stage of the candidate's application
- A stage description of the required activity for the candidate's current stage
- The candidate's contact details (phone, mobile, email address)
- The candidate's location details (full postal address)
- A map to provide a general visual location of the candidate's city
- Stage actions to progress, reject or withdraw the candidate
- A link to recruiter forms which may be required depending on the current stage

#### Figure 2: Current Status Tab

Current Status	Forms 📑 Files 🔀 History 🧶 Screening	g 📘 Notes 🗒 Additional Applications
A Current Status		Stage Description
Current Stage Next Stage	Screening Screening Decision	Hiring Manager reviews the candidate's Application Form (and CV if supplied) and grades the candidate as "YES", 'NO' or 'MAYBE'. When each allocated Hiring Manager has screened the candidate, this actiom marks the stage as complete and moves the candidate to the ne stage – Screening Decision
Contact		F Stage Actions
Telephone Number Mobile Number Email Address	0121 444 5555 07876 111111 <u>smas0@yahoo123.com</u>	Progress     Reject     Withdraw     Hold     Recruiter Forms
Securition		<b>9</b> Мар
Address 1 Address 2	Flat 4, The Greenway	Dublin Leeds
Town/City County Postcode	Shirley West Midlands B90 3AU	Birminghama Bristol London Vetherlan
Country	United Kingdom	Coogle Map data @2013 GeoBasis-DE.BKG (@2003), Go

At the top of this tab is a dropdown that shows the job title and the candidate's application ID (see figure 3).

If the candidate has applied for other vacancies, their additional applications will be listed in this dropdown.

Switch the job title to load the record card details for that application.



#### 4. Forms Tab

This tab contains the initial application form that has been completed by the candidate.

The tab also contains every additional online form that has been completed in relation to the candidate's application.

Additional Forms are used to capture extra details and can be completed by different individuals including hiring managers, HR recruiters, referees and the candidate themselves.

The form types are:

- The complete original online application form
- Each individual form section of the original application form
- Screening feedback forms
- Recruiter forms (e.g. schedule interview, job offer details etc.)
- Hiring manager forms (e.g. interview feedback)
- Reference forms (one form per referee)
- Candidate additional forms (e.g. payroll details, uniform request etc.)

Figure 3: Forms Tab

Form Name	Form Type	Actioner	Status	
Complete Application Form	Application Form	Rita Parsons	Completed	e
Personal Details	Application Stage	Rita Parsons	Completed	Q 🌽
About You	Application Stage	Rita Parsons	Completed	Q 🥖
Employment History	Application Stage	Rita Parsons	Completed	Q 🌽
Education & Training	Application Stage	Rita Parsons	Completed	Q. 🥖
References	Application Stage	Rita Parsons	Completed	Q. 🥖
Equal Opportunities	Application Stage	Rita Parsons	Completed	Q. 🌶
Submit Application	Application Stage	Rita Parsons	Completed	Q 🌶
Application Complete	Application Stage	Rita Parsons	Completed	Q. 🤞
Your Screening Decision	Additional Form		Completed	0
Your Screening Decision	Additional Form		Completed	Q
Setup Interview	Additional Form		Completed	Q. 🌶
Setup Interview	Additional Form		Completed	Q. 🍐
Contract Setup Reach New Starters	Additional Form		Completed	Q. 🅖

To view a form, click the magnifying glass icon and the form will open in a new tab.

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Errm Viewer			😫 Print
	Rita Parsons		
	Application for Procurement Administrator		
	Applicant : 577453		
	PERSONAL DETAILS		
	Title First Name Surname Email Address Address Town / City County County Postcode Home Telephone Mobile Number	Mrs. Rita Parsons rparson12@hotmail12.co.uk 2, Swan Street Kingswinford West Midlands United Kingdom DY6 IJS 01384 35335 01384 35335	
	National Insurance Number Do you have the right to work in the UK?	NS123456A Yes	
	ABOUT YOU		
	When would you be able to start in this role?	Within 1 Month	
	Do you have the ability to work from home using your own broadband connection?	Yes	
	Do you have the ability to travel to various locations using your own or public transport	Yes	
	Do you have the flexibility to work evenings and / or weekends if required to as part of the job?	Yes	
	What is your current notice period? (If applicable)	None	
	EMPLOYMENT HISTORY		

Figure 4: Click the magnifying glass to view a form

To edit a form, click the edit (pencil) icon and the form will open in a new tab. Make the required amendment(s) and then save the form.

Figure 5: Click the pencil icon to edit a form

Setup Interview		
Interview Date * Interview Time * Interview Venue * Interview Contact *	28/08/2014 12 O0pm v Head Office v Gareth Tyrell Save	
		_

Please note that manager screening forms and references cannot be edited.



#### 5. Files Tab

This tab contains all of the files relating to the candidate's application that have been uploaded to the system.

The files may have been added by the candidate themselves during the initial application process (e.g. CV or Cover Letter) or later in the process (e.g. Proof of Identity, Exam Certificates, Driving Licence etc.).

The files may also have been added by the HR recruiter during the recruitment process (e.g. P45, P46 etc.).

The system may also add files automatically if the candidate's workflow includes merge documents (e.g. Offer Letter, Employment Contract etc.).

Files can be added to a candidate's application at any time by the **Candidate** themselves (e.g. CV, Photo etc) or by a **Recruiter** (e.g. Scanned copy of passport, Qualification Certificates etc).

Click the **Download** icon to open the file (see figure 6) or click the file name and click **Remove** to delete the file.

Document Type	Unloaded Date	Download
		Download
Covering Letter	10/10/2013 05:42PM	
	Passport Document Type Passport Covering Letter	Document Type Uploaded Date Passport 10/10/2013 05:43PM

Figure 6: Files tab

To upload a new file:

- 1. Click Choose File to locate the file
- 2. Set the Document Type in the dropdown selector
- 3. Click Upload File



#### 6. Application History

Every event associated with the candidate's progression through the recruitment process is recorded in a full audit trail. This is referred to as the candidate's **History**.

The history includes every activity performed by:

- The Candidate
- The Hiring Manager(s)
- The HR Recruiters
- The Referees
- The System

The date and time stamp for every event is recorded and shown.

Figure 7: Review the audit trail in the History tab

N	Event Date	Actioner
Bent Email Application Form Received	22/07/2013 10:12AM	System
Application Completed	22/07/2013 10:11AM	Sharon Mason
Stage Submit Application Completed	22/07/2013 10:11AM	Sharon Mason
Stage References Completed	22/07/2013 10:11AM	Sharon Mason
Stage Equal Opportunities Completed	22/07/2013 10:11AM	Sharon Mason
Stage Education & Training Completed	22/07/2013 10:11AM	Sharon Mason
Stage Employment History Completed	22/07/2013 10:11AM	Sharon Mason
🖉 Stage About You Completed	22/07/2013 10:11AM	Sharon Mason
Stage Personal Details Completed	22/07/2013 10:11AM	Sharon Mason
Sent Email Return to Application Email	21/07/2013 10:22PM	Amanda Clark
Hire Details Confirmed	21/07/2013 10:21PM	Amanda Clark
Application Created	21/07/2013 10:21PM	Sharon Mason

Every email that has been sent to the candidate will appear in this tab.

To read the email, click the magnifying glass icon (*see figure 7*). The email content will open in a new tab.

To resend an email at any time, click the resend envelope icon (see figure 7).

If any attachments were sent with the email, hover over the paperclip icon (*see figure 7*) to see the file names.



#### 7. Notes Tab

Recruiters can make notes about a candidate at any time. This tab shows the notes and allows the recruiter to add new notes.

Figure 8: View and add candidate notes

Current Status	Forms	Files	History	Screening	Notes	Additional Applications	
Add Note :							C Add Note
Note						Added	Added By
Asked Sharon to b	ring her qualific	ation certifica	ates to the inte	rview with her		10/10/2013 06:48PM	Amanda Clark
Sharon contacted	us to reschedu	le her first int	erview			10/10/2013 06:47PM	Amanda Clark

To add a New Note type into the text box and click Add Note.

#### 8. Additional Applications Tab

If the candidate has applied for other roles at any time, the details will be shown here.

Figure 9: View and add candidate notes

2 Current Status	🖻 Forms 🛛 🝺 Files 🛛 🔀 H	istory 🍰 Screening	🔁 Notes 🛛 🔀 Additional A	oplications
Job ID	Job Title	Applicatio	n ID Current Stag	lê
	Sh	naron Mason has no other	applications on record	