



User Guide

# Candidate Record Card



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## CONTENTS

	<i>Page</i>
1. Candidate Record Card Overview	2
2. Open a Candidate Record Card	2
3. Current Status Tab	3
4. Forms Tab	4
5. Files Tab	6
6. History Tab	7
7. Notes Tab	8
8. Additional Applications Tab	8

## 1. Candidate Record Card Overview

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

The Record Card allows the recruiter to:

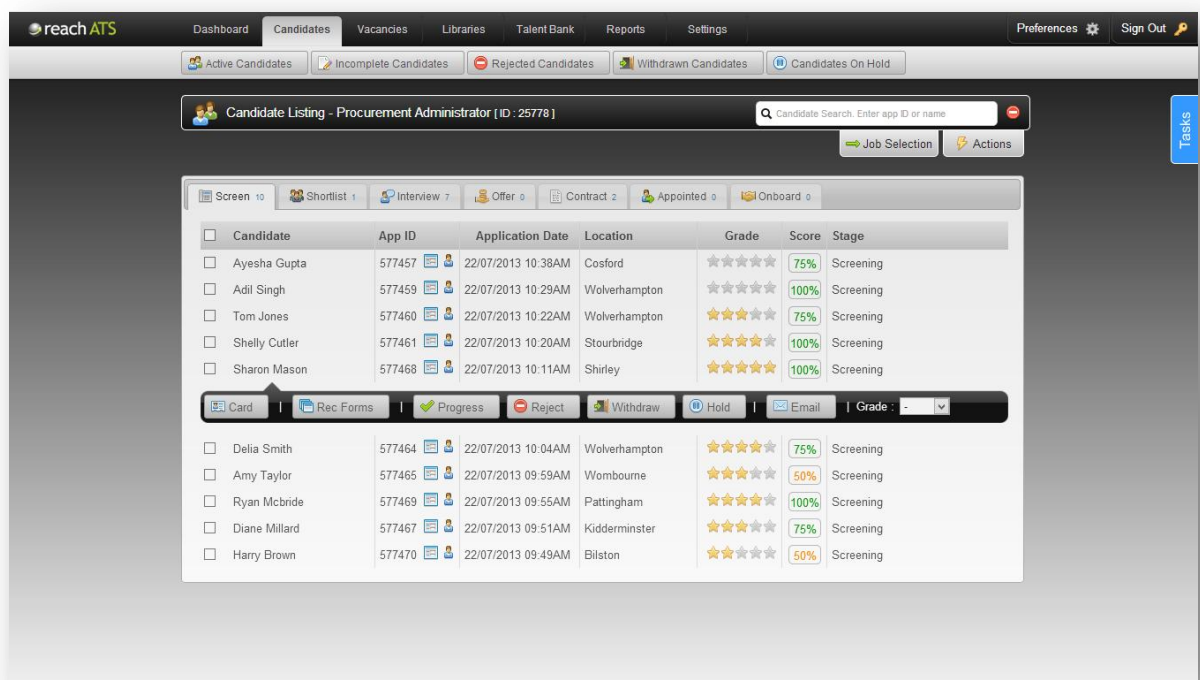
- Instantly view the candidate's current status and contact details
- View the completed online application form
- View additional forms including references
- Access candidate files (e.g. CV) and upload files related to the candidate
- View additional forms (inc referees)
- View the audit trail of the 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

**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

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.

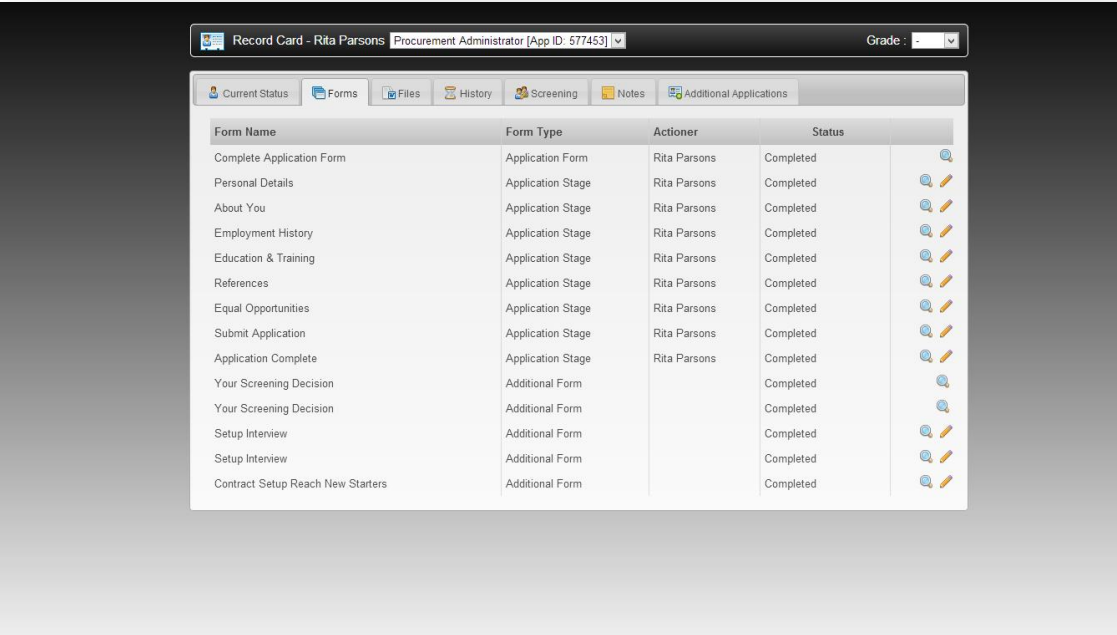
The tab also contains every additional online form that has been completed in relation to the candidate's application.

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.*)

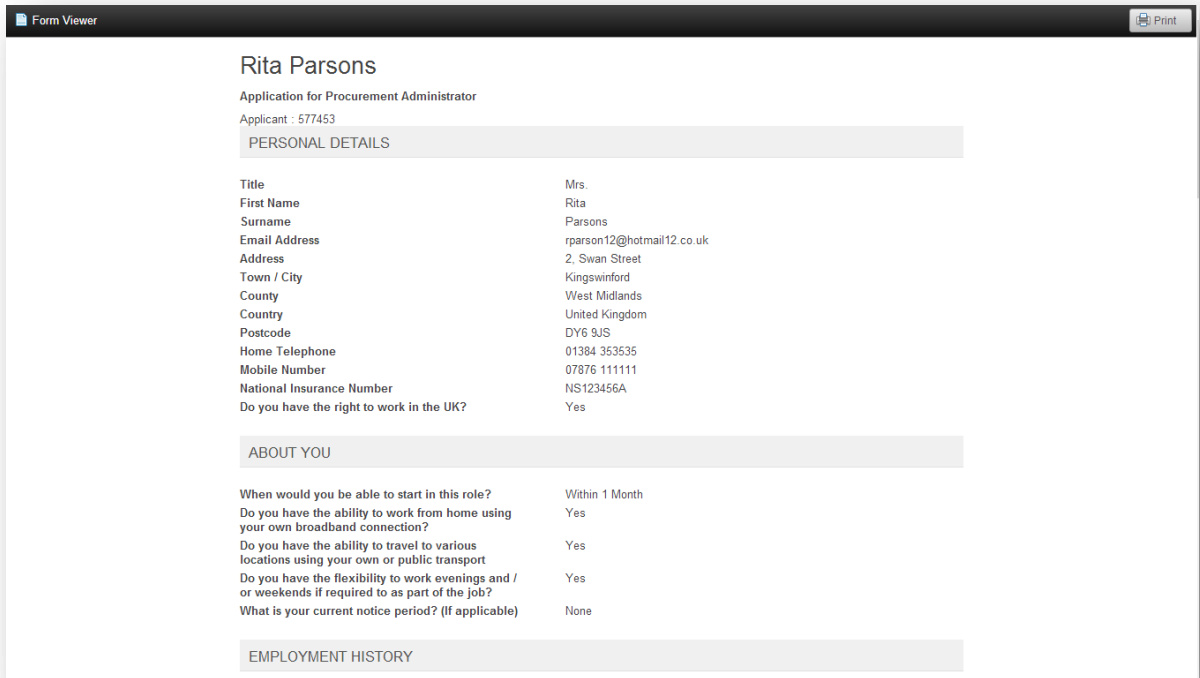
**Figure 3: Forms Tab**



Form Name	Form Type	Actioner	Status
Complete Application Form	Application Form	Rita Parsons	Completed
Personal Details	Application Stage	Rita Parsons	Completed
About You	Application Stage	Rita Parsons	Completed
Employment History	Application Stage	Rita Parsons	Completed
Education & Training	Application Stage	Rita Parsons	Completed
References	Application Stage	Rita Parsons	Completed
Equal Opportunities	Application Stage	Rita Parsons	Completed
Submit Application	Application Stage	Rita Parsons	Completed
Application Complete	Application Stage	Rita Parsons	Completed
Your Screening Decision	Additional Form		Completed
Your Screening Decision	Additional Form		Completed
Setup Interview	Additional Form		Completed
Setup Interview	Additional Form		Completed
Contract Setup Reach New Starters	Additional Form		Completed

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

**Figure 4:** Click the magnifying glass to view a form



**Form Viewer** Print

**Rita Parsons**  
Application for Procurement Administrator  
Applicant : 577453

**PERSONAL DETAILS**

Title	Mrs.
First Name	Rita
Surname	Parsons
Email Address	rparson12@hotmail12.co.uk
Address	2, Swan Street
Town / City	Kingswinford
Country	West Midlands
Country	United Kingdom
Postcode	DY6 9JS
Home Telephone	01384 353535
Mobile Number	07876 111111
National Insurance Number	NS123456A
Do you have the right to work in the UK?	Yes

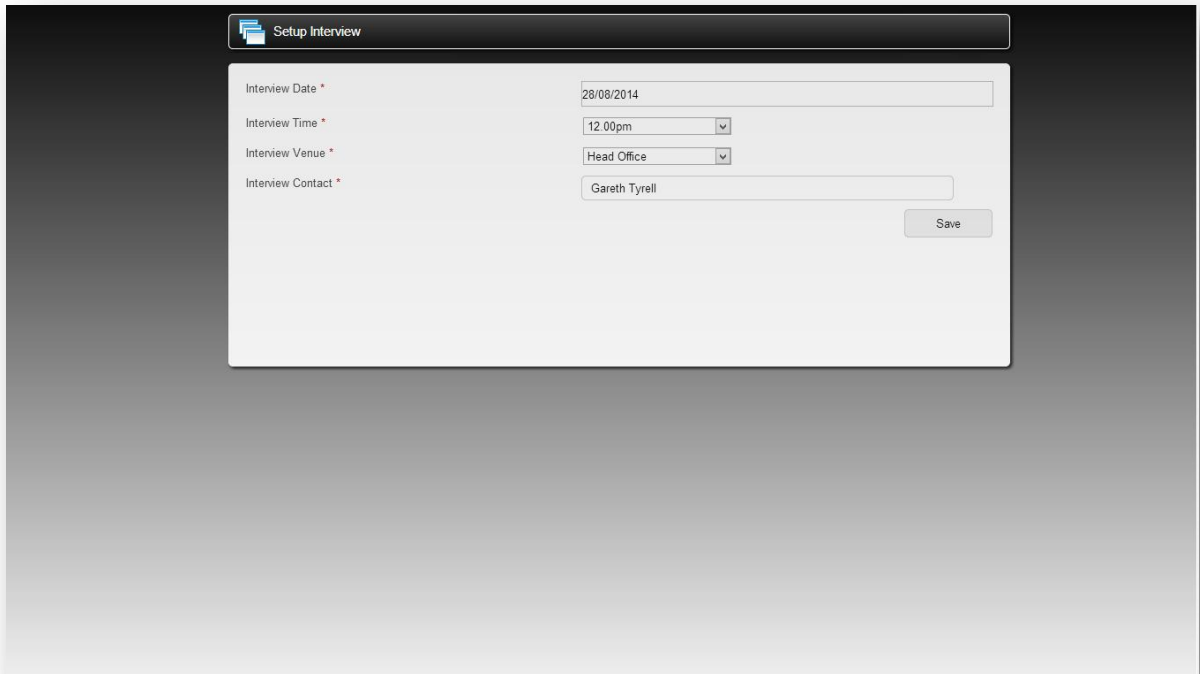
**ABOUT YOU**

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**

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 *	28/08/2014
Interview Time *	12.00pm
Interview Venue *	Head Office
Interview Contact *	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.*).

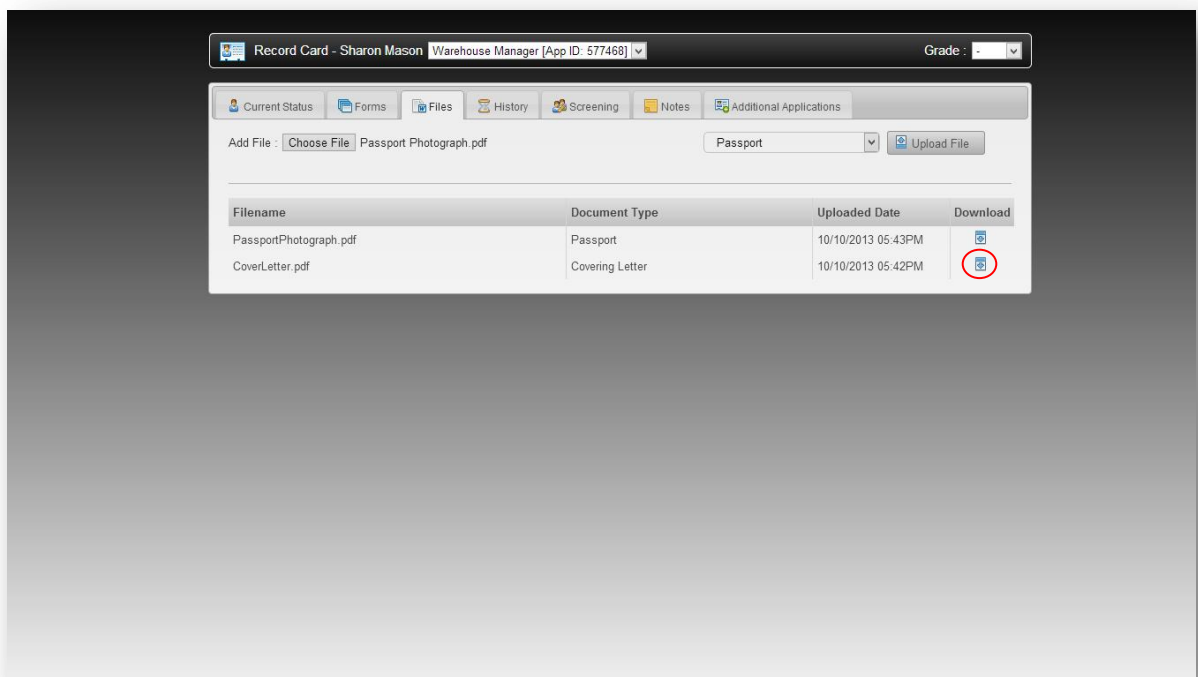
The files may also have been added by the HR recruiter during the recruitment process (e.g. *P45, P46 etc.*).

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.

**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

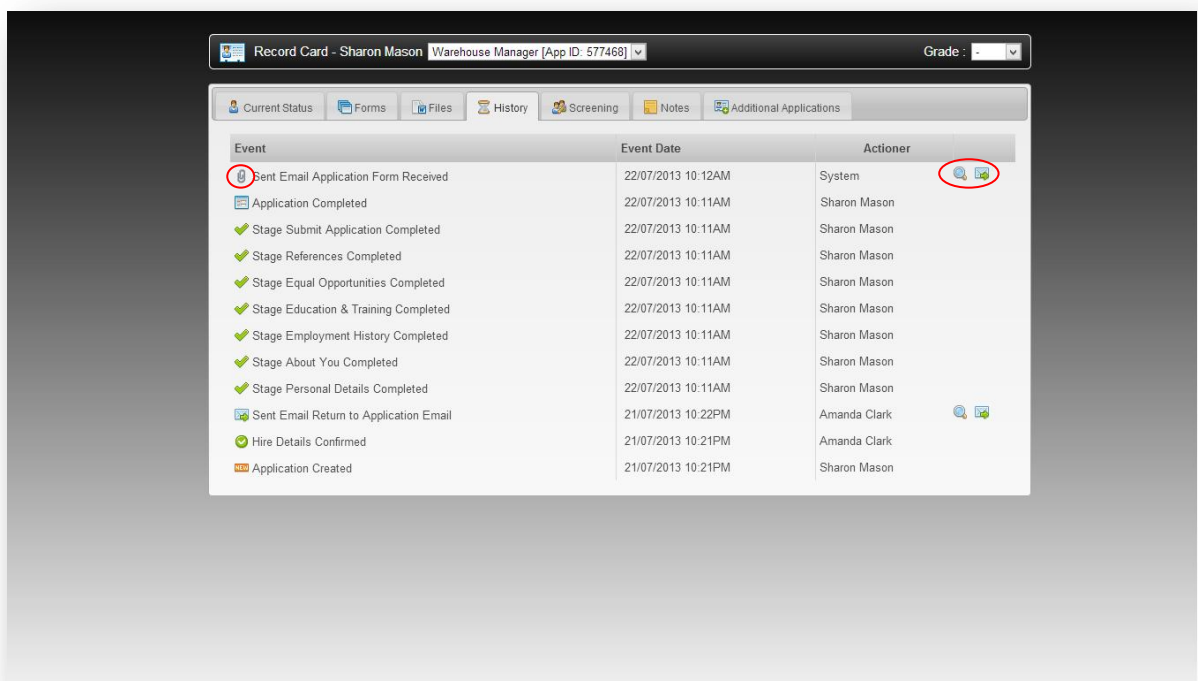
Every event associated with the candidate's progression through the recruitment process is recorded in a full audit trail. This is referred to as the candidate's **History**.

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**



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.

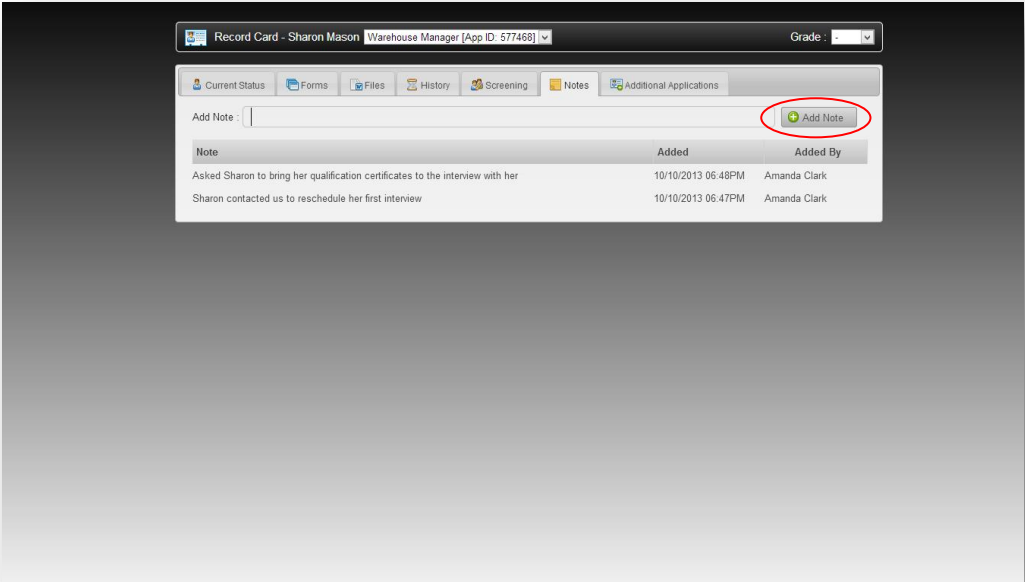
To resend an email at any time, click the resend envelope icon (*see figure 7*).

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**



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**

