Recruitment Add-On Manual

1. Introduction

Welcome to StaffSavvy's Recruitment Add-On. This optional, additional-charge add-on module is designed to help you publicise, receive the best applications, shortlist fairly and effectively, manage interviews, and finally make job acceptance and onboarding easy.

As with all StaffSavvy tools, the recruitment add-on is designed to handle large workforces and keep administration to a minimum.

1.1. Enabling the Recruitment Add-On

As the recruitment add-on has an additional cost, only users with both finance and global configuration access can enable the add-on.

Go to the global configuration page under System > Configuration > Global Settings. Under the Features tab, scroll to the Add-On Modules section. Enable the add-on and click save. You should immediately see the Recruitment menu item appear in the main menu.

1.2. Access Levels

This add-on has several access levels. Each will be displayed in its own section under the Control Permissions page. We recommend you check these permissions to ensure the right levels have access.

Note: Staff members who will be shortlisting applications do not need to have access to the recruitment add-on. Once assigned as an application shortlister, the system will grant limited access to the associated applications.

This ensures the staff members can shortlist the applications and make decisions (based on their shortlisting role for that job position). It also ensures that these staff do not have access to further details of the applicants, including the unblinded application forms and private information.

1.3. Data Protection

The recruitment add-on has been built with data protection in mind, with full encrypted-at-rest protection and comprehensive blind shortlisting management.

Under the Global Settings, you also have the option to customise the data privacy statement provided to all applicants. We strongly recommend that you review this statement often and ensure that all of your activities concerning the application data are covered by your statement.

The add-on also has built-in data retention periods that will shred the data once these periods have expired. Please ensure they are suitable for your needs and match those stated in your privacy statement.

2. Recruitment Portal

This is the public part of the recruitment process that will list all of your open positions for potential applicants to apply to.

2.1. URL

By default, your portal is located at /apply from your main StaffSavvy login page.

For example, if your StaffSavvy login is **example.staffsavvy.me,** then your public recruitment portal is **example.staffsavvy.me/apply**

If desired, the portal can be configured to be a subdomain of your main website or a completely separate domain. For example, you might want to use jobs.example.com to access the portal.

Please contact StaffSavvy support for more details and options.

2.2. Options

Access the options for your portal under the Recruitment menu option, Recruitment > Settings > Portal Settings.

2.2.1. General Tab

The General tab is where you can build the introductory text that will be shown on the front of the recruitment site. The recruitment portal has a home page when you first access it, and this will be the text that appears on that first page. You can experiment with different text to see how this affects your homepage layout.

It also allows you to set the text that will come up before an interview begins.

The language option at the bottom of this tab allows you to set what the site should call each position. Ensure this is a singular word and capitalised so the site can use this in different situations. Recommended examples include Position, Role & Job.

2.2.2. Email Content Tab

This tab contains text that will be included in various emails sent from the site. You can bespoke the language to suit your organisation. This includes templates for the Rejection Email, Interview Email, and Offer Letter templates.

You can use the #position# text to mail-merge the title of the position the email relates to into the email content.

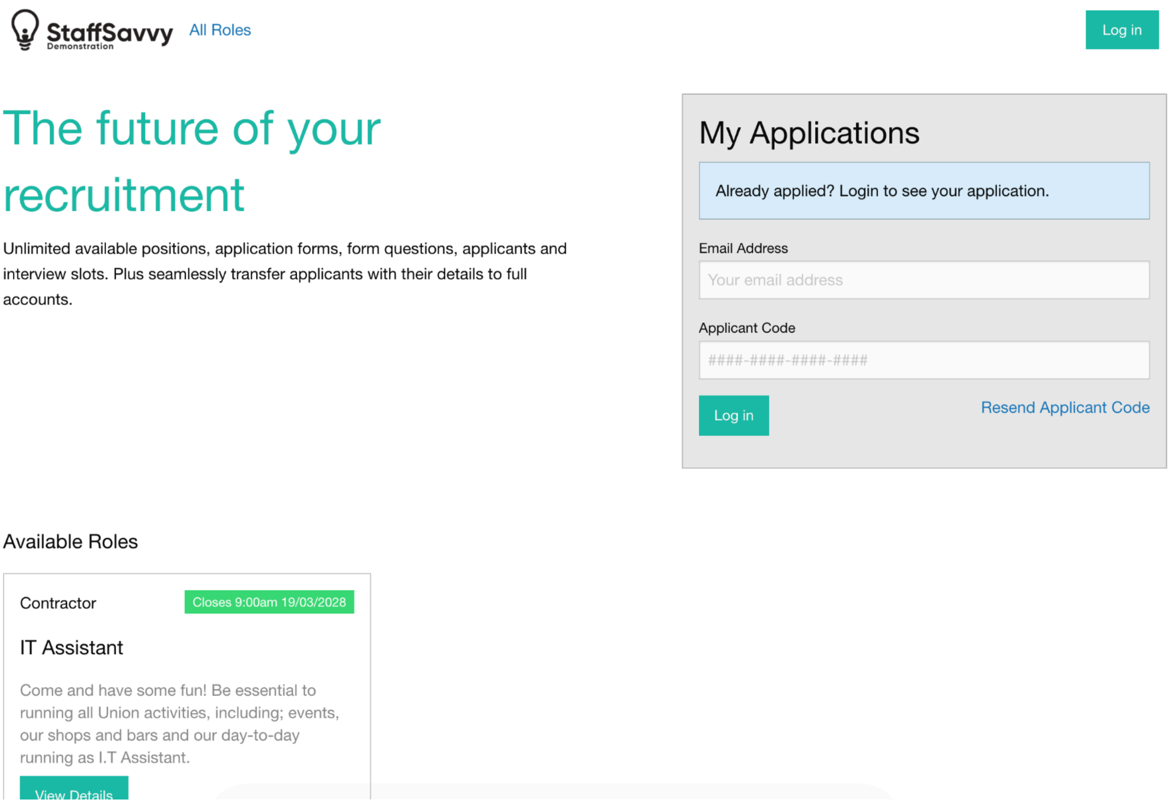
2.2.3. Design Tab

This tab allows you to set the colours you use throughout the front of the site. Simply click each colour and select the one you want to use. This will affect titles, headers, buttons and backgrounds.

If you have web programming skills or a staff member with those skills, they can also create your own CSS styles to use on the site. This gives you complete control over the colours and some layout within the portal.

Simply enter your CSS on this page and click Save to apply the CSS.

You can also edit the portal's HTML footer. This allows you to add your own content to the portal directly. Below is an example of how your home page might look once you have set up your details and design settings.



3. Application Forms

Application forms are the core of the application process. They are completely customisable and can feature any combination of questions, file requests or information blocks across any number of pages.

Each answer is individually encrypted and stored separately, ensuring the data is held securely.

3.1. Version Control

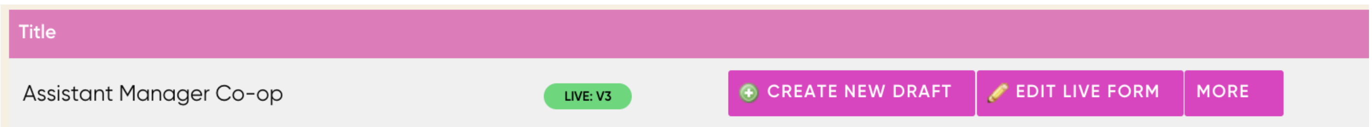
The application forms are version-controlled, ensuring a fair review for each applicant. The applicant's application is viewed alongside the exact questions asked when they completed the form.

When you create a new application form or edit an existing one, you are making changes to a draft. Once you have completed your changes, simply publish the draft to make them live and ensure applicants use this form.

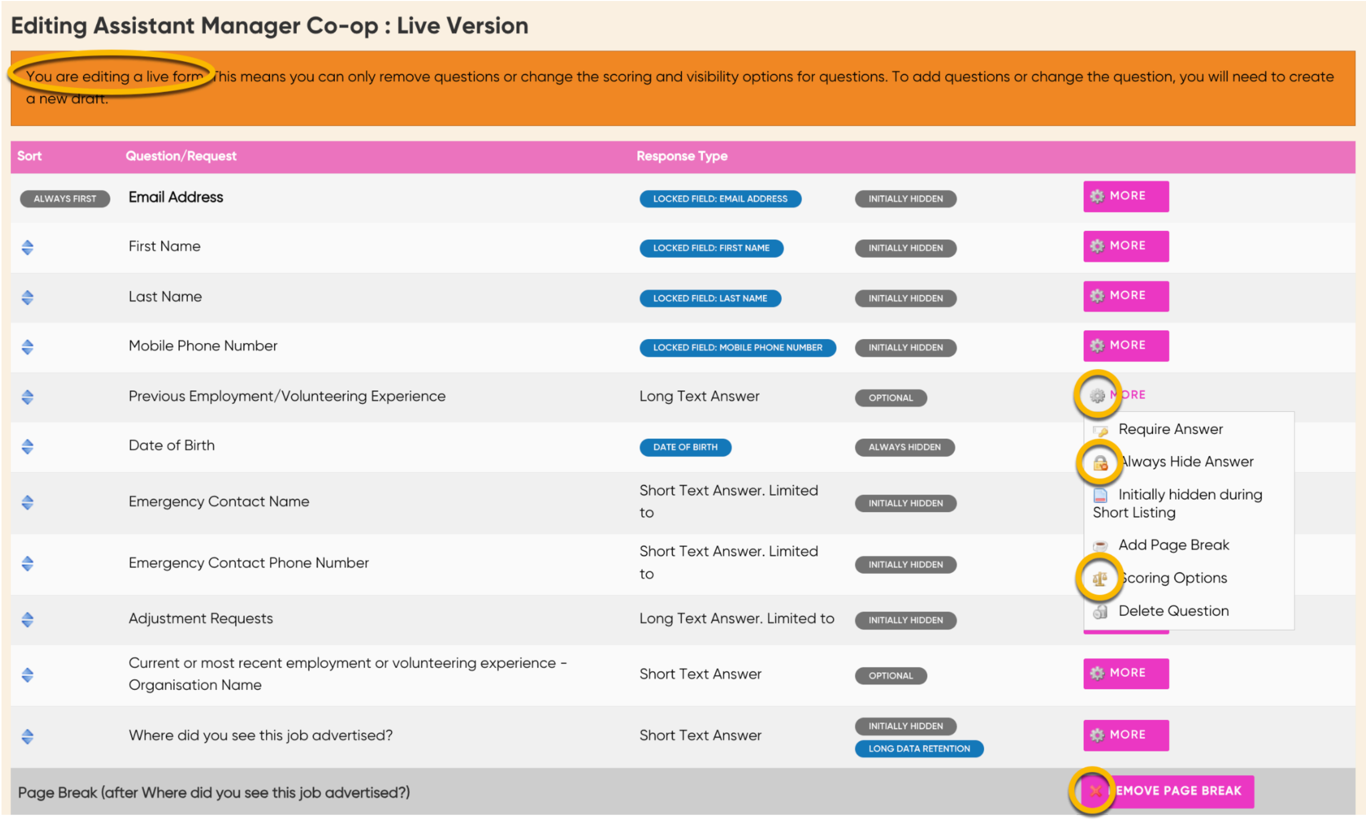
Any applicants who have already started the application form on an earlier version will complete their forms on that version and won't be moved to the latest version.

You can also edit the details of a live application form. For example, you can now edit the blinding/hidden options, page breaks, and scoring options and remove questions at any point in the application process.
To use this, go to Recruitment > Forms > Application Forms. You will see a list of forms that should be drafts or live forms. If a form is a draft and not live, you can edit every question and detail, but it must be live to be assigned to a position.

To edit a live form, first make sure that it is live. You can tell if a form is live because if it is not live, it should have a 'Publish Draft' button next to it. You should also see the option to 'Edit Live Form' if the form is active.



Click the edit button to take you to the page with all the editing options. You can now edit the blinding/hidden options, page breaks, and scoring options and remove questions at any point in the application process.



Once you have made your changes and saved the application form, it will be updated immediately.

3.2. Application Form Questions

You have complete control over the questions asked in your application form. You can easily match your existing forms or expand them with more detailed questions.

3.2.1. Before you start

We recommend that you create a “generic” application form that contains all of your standard questions. This will allow you to create specific application forms for certain roles (with detailed questions for that role) and simply include the generic application form as part of it. This means you don’t need to update all of the forms to make a change to your generic questions.

3.2.2. Email Address

We require an email address to be the first field on any form to ensure we can identify an applicant. This is to provide the applicant with a code to resume editing their application form.

3.2.3. Question Options

You can add any combination and quantity of the following answer types:

- **Short Text**
  A single line of text. You can set a limit in characters or words.

- **Long Text**
  Multiple lines of text with basic formatting. You can set a limit in characters or words.
- **Select One**
  Provide a list of options for the applicant to choose from.
- **Select One with Other**
  Provide a list of options for the applicant to choose from, along with an “other” option at the end, allowing the applicant to provide a single-line text answer.
- **Select Many**
  Provide a list of options for the applicant to choose from, where they can select as many as are applicable.
- **File Upload**
  Applicants can upload a file for shortlisters to review.
- **Data Field**
  If you have added custom field sets to StaffSavvy (these let you add extra data to your staff accounts for any purpose you desire), you are able to use the same questions within the application form. This allows you to collect the data when they apply, and it will be automatically copied over to their StaffSavvy account if they are successful in their application.
- **Special Field**
  There are several special fields to choose from. These are all personal data fields that staff are expected to type in. They are also standard StaffSavvy fields from the main site, which means that once submitted, they can be pulled through to create the staff member’s StaffSavvy account if the candidate is successful.
  - First name
  - Last name
  - Nickname
  - Mobile Phone Number
  - Date of Birth
- **Title and text**
  This allows you to add a title and a block of text within the application form. This is useful for providing information or context to the applicant about a series of questions.
- **Score Only**
  This is a special question type which doesn’t actually ask a question. These questions are not shown to the applicant at all and can be used to score the applicant against a job description or required skills.
  Simply enter the scoring point as the question, and this will appear during the shortlisting.
- **Sub Form**
  This allows you to include another application form in your current list of questions. It allows you to have standardised questions that you can include on all forms. Use the form at the top of your application to add questions. You can then edit, remove and reorder the questions as needed using the controls on the right.

3.2.3.1. Short & Long Text Answers

Short text answers will be displayed with a single-line text box and are designed for answers under 100 characters.

Long text answers are displayed in a self-expanding text area where applicants can add as much information as they allow. They can also use basic formatting on this text, including bold, italic, underlined and bullet lists.

Both long and short answers can contain a limit on the information provided. This can be a character limit or a word limit.

When marked as required, the answer must contain at least one character of text.

3.2.3.2. Select One & Select All Answers

These answer types allow you to enter as many options as you wish and order them as needed.

The ‘Select One’ answers force the applicant to select only one answer, whereas the' Select All That Apply' answers allow applicants to choose any combination of options.

When marked as required, the applicant must select at least one answer. If it’s an optional question, then they can leave all options unselected.

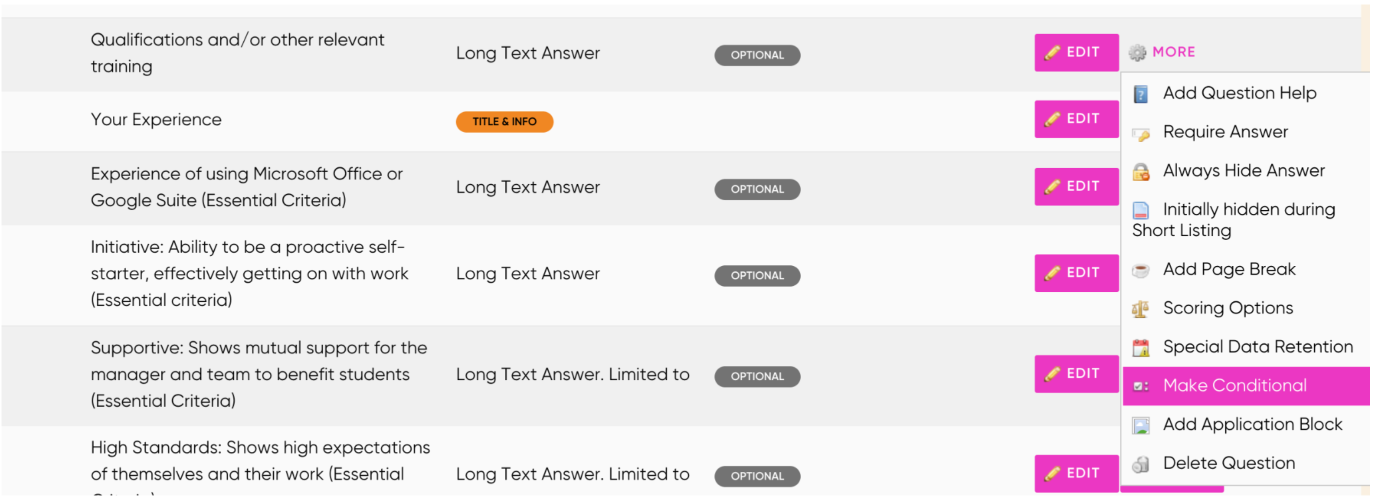
3.2.3.3. File Upload

File Request answers allow applicants to upload documents to their application. The file type must be selected from a list of staff document types. You can add new file types under System > HR Settings > Staff Member Document Types.

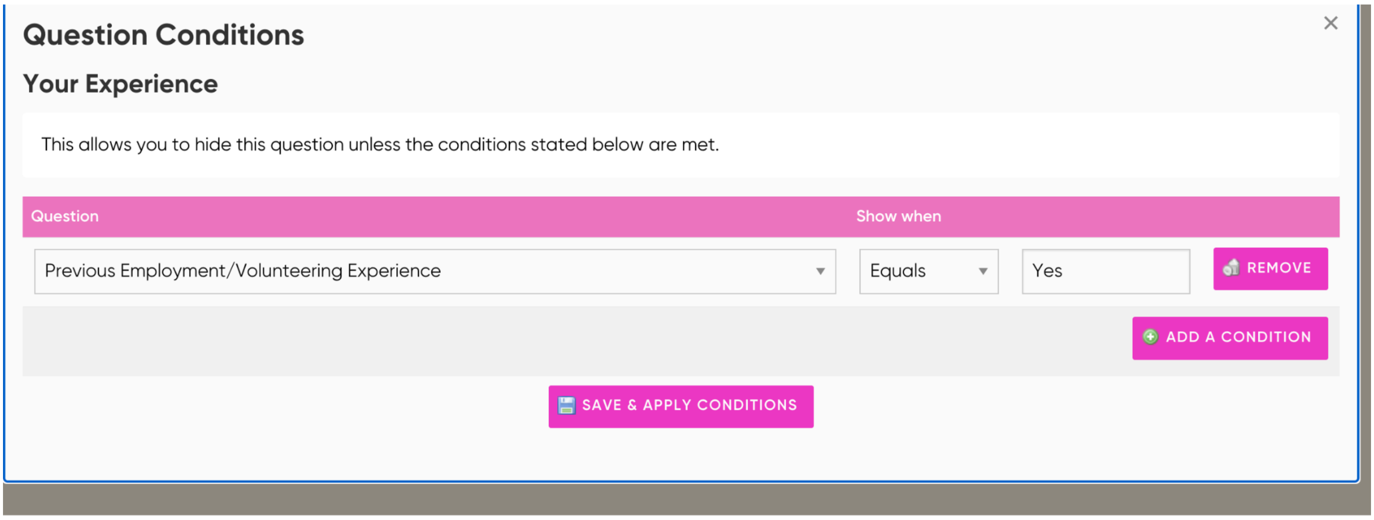
This is required so the system can correctly map the provided documents to staff accounts if the applicant is successful. When marked as required, the applicant must upload a document; otherwise, this can be left empty when applying.

3.3. Recruitment forms ‘required information’

Conditional questions allow you to ask for information only if required. This is useful when you have questions that might not be relevant to certain participants based on how they answered a previous question.



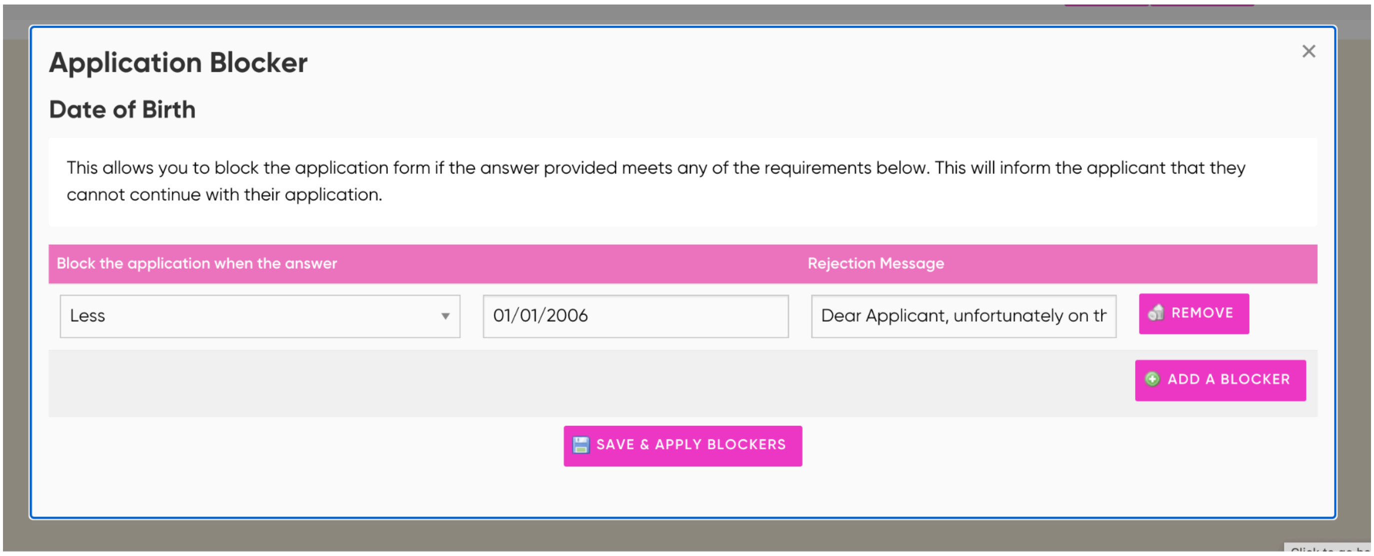
Rather than having them answer unnecessary questions, you can now set up conditional answers where some questions will only be visible to users who answer a certain way.



For example, suppose you are asking the respondent to give further details if they have a specific medical condition. There might be multiple questions about that one specific condition. If those questions only come up if the participant recorded 'yes' for whether or not they had the condition, this would make it easier and more streamlined for participants without the aforementioned condition.

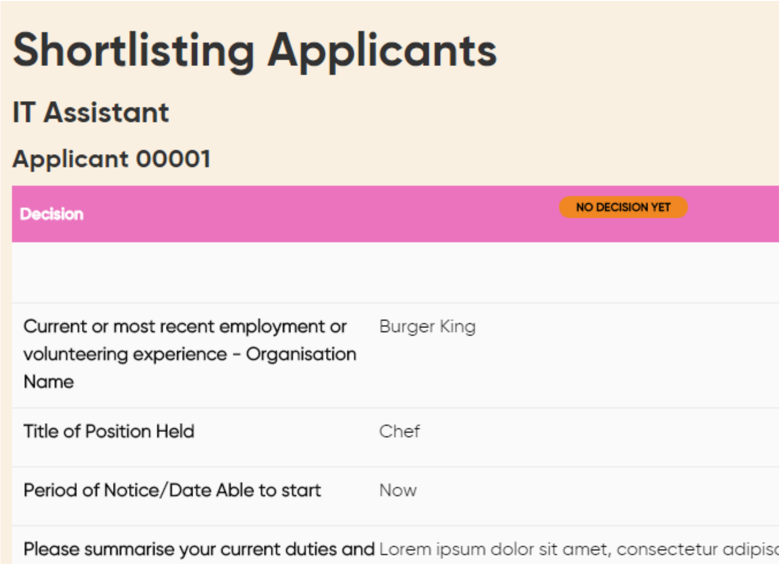
3.3.1. Application Blocks

You also have the option to block an applicant. This option comes up alongside the 'make question conditional' option. However, its purpose is to block an applicant entirely from proceeding.



This is especially useful if you have some prerequisites for applying that cannot be ignored, thereby saving both you and the applicant a significant amount of time. This might be relevant if the applicant is under eighteen and the position involves serving alcohol to customers.

3.4. Blind for Shortlisting vs Hidden Answer



By default, all answers are visible to recruitment managers and shortlisters throughout the application process.

You can mark any answer (including email, names, etc.) as either “initially hidden” or “always hidden.”

Initially hidden, the answer is effectively blinded during shortlisting. Specifically, it will hide the answer from anyone assigned as a shortlistee for that position until the applicant has been offered an interview. Then, the answer will be visible during the interview and final decision phases. Recruitment managers can see the answer throughout the process unless they themselves are set as shortlisters, and then the shortlister rules apply.

Always hidden will hide the answer from anyone who is assigned as a shortlisted for that position throughout the process. It will never display the information to them. Again, recruitment managers can see the answer throughout unless they themselves are shortlisters.

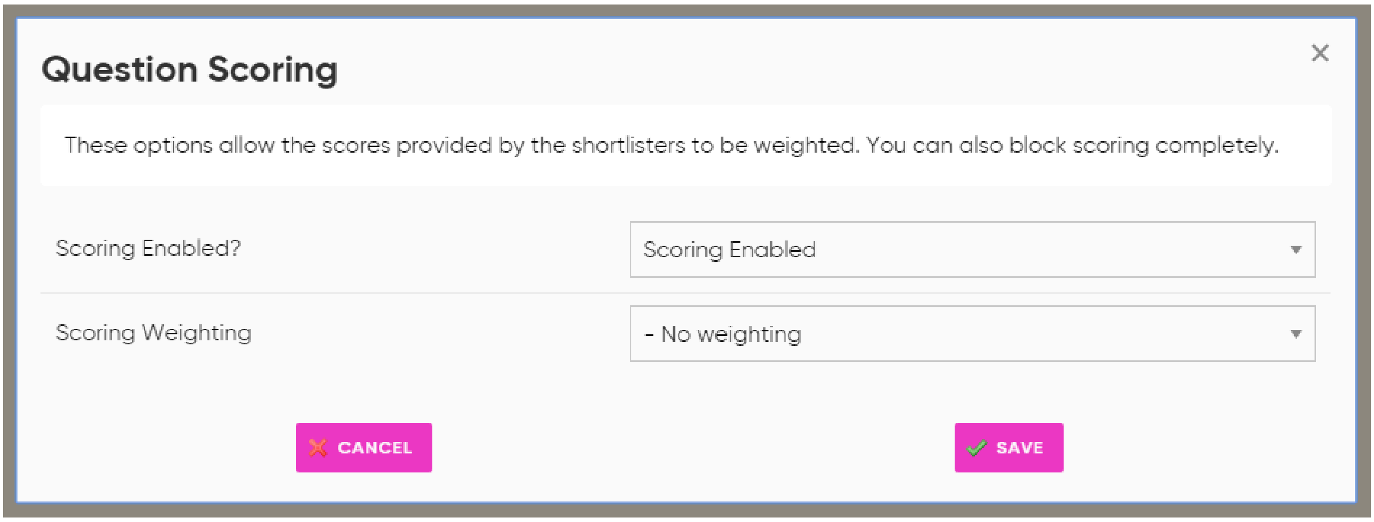
3.5. Scoring and Weighting

You can configure each question to be either scorable or not. This is only used if you are using scoring as a short-listing method.

When the question is scorable, the short-listers are asked to score it from 0 to 5.

You can also apply a weighting to the scores. This can multiply or divide the score to affect the overall score assigned to the application.

To change the scoring settings, click the 'More' button on the question field and choose Scoring Options.



3.6. Sub Forms

Subforms are one of the more powerful features of application forms. It allows you to have a standard set of questions that are always asked and enables you to include them easily on every application form.

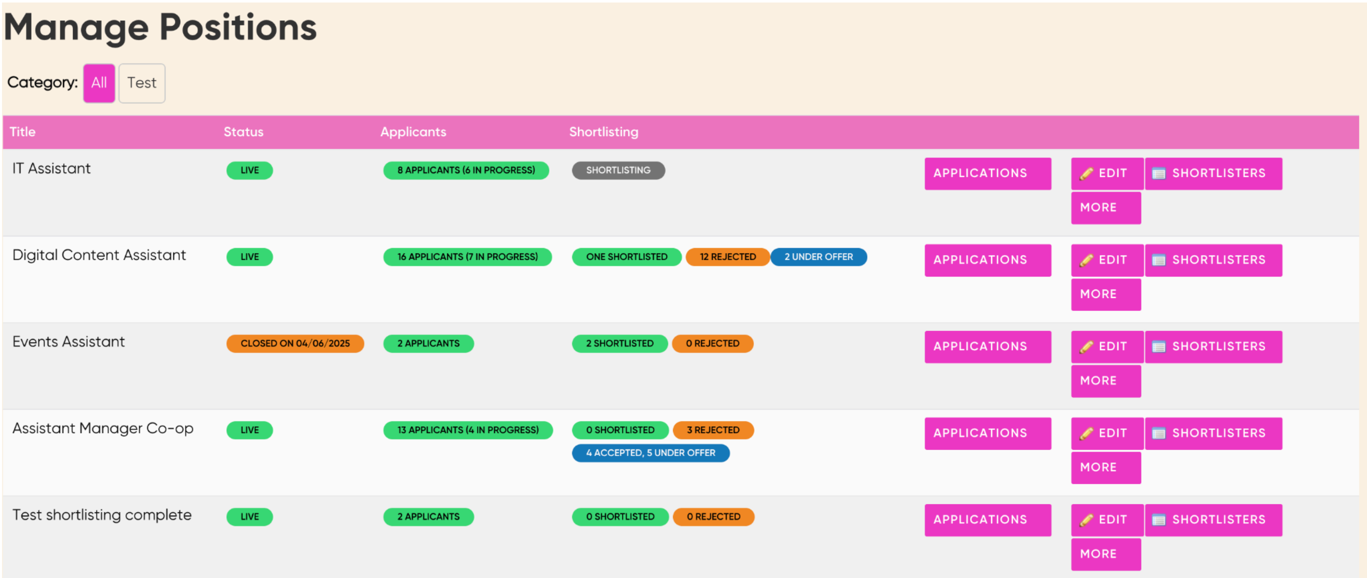
Subforms are simply other application forms. They can be used on their own or included in other application forms, and no limit exists to the number of subforms that can be included in an application form.

Please note: only one level of subforms can be included, so you cannot include a subform that includes further subforms. Further sub-forms will be ignored.

To prevent fragmentation of answers provided by applicants, the sub-forms are copied when the main form is published. Changes to any sub-forms won't affect the main application form until it is next published. This ensures that all applicants are providing answers to the same questions unless you explicitly change the form.

4. Positions

Positions are the job openings that applicants are applying to. These contain all the public information about the roles and details on what should happen to successful applicants for that position. You can view all active positions under the Manage Positions page. It will also give you information about application statuses, including shortlisted applicants and the number of pending and accepted offers. Then to create a new position select create new position from the actions menu.



Note: We strongly recommend making a new position each time the role is advertised. Reusing a position will retain all of the previous applicants. You can duplicate the position to create a new one and separate the previous applicants from the new one.

4.1. General settings

This tab is where you set up the basic information for a position. You can edit this information at any time, but be aware that applicants will not be informed of any changes.

4.1.1. General settings

Under our general settings, you will need to include details such as the number of available positions, opening and closing dates, job location and a reference code if you wish to display this information to applicants.

4.1.2. Indeed integration

We have now set up the option to link your recruitment process with Indeed. When recruiting, you can now post new positions via Indeed. Then, any applications submitted via Indeed will be pulled through into your StaffSavvy recruitment portal, seamlessly integrating with your current system while allowing you to reach a wider audience when recruiting. Additionally, once you have added a new position that you have added to your Indeed portal you can view this under manage positions.

It is important to note that the integration does not allow conditional questions when creating an Indeed application. Every question requires an answer, so please keep that in mind when requesting personal information. Under this section, there are certain details that must be input for the position to work with Indeed. These include:

- **Remuneration type** - How frequently will staff be paid, by hour, by week, or by month
- **Starting or fixed value** - How much is the base salary for the job
- **Maximum value** - what is the maximum salary offered for the position
  Job type - Is the position part-time, full-time, casual or freelance
- **Location** - Location including town/city, postal code and country code
- **Display publicly** - Do you want to display on Indeed or flag as internal
- **Use Indeed Apply** - If enabled, this allows applicants to apply directly via Indeed with a single click. Complex conditional questions and additional file upload requests are not supported

There are also additional source and detail tracking for applications delivered automatically from Indeed. The Indeed tracking notes include how the applicant found the job when you view an application. They will also include information such as sponsorships or searches. To see this, go to Manage Positions and view your Applications. This information will only appear for roles that were used via Indeed.

4.1.3. Applications, Shortlisting and Interviews

This tab allows you to set the duration for which the position will be open to new applications. It is also where you can set details such as whether the application will be hosted on your recruitment portal, or if there will be a limit on the number of applicants, and whether applicants can edit their form once submitted.

You can also add an application form you have created here. To learn more about creating an application form to attach to a position, go to our section on Application Forms.
This page also allows you to set the shortlisting method for reviewing and ranking your applicants. Refer to the Shortlisting section for more details.

In addition to this, you can also add a scoring form to be included in the interview process.

4.2. Successful Applicants

This tab allows you to configure what should happen to successful applicants. You can select the level of access they will have within the system, the roles/skills they should be assigned to, and any training programs they should be assigned to from the start.

Under the successful applicants tab, you are also able to assign jobs to the position you are hiring for when making an offer for positions. There are also other options to consider, including whether or not jobs can be changed by those making hiring decisions.
Hiring managers can also assign new positions to a specific squad under the skills tab, allowing them to organise their team structure as early as the recruitment process.

When an applicant is offered and accepts the role, StaffSavvy will create a staff account within your main site. It will copy over all fixed answers (name, email address, phone, DOB, etc.) plus any documents they have uploaded.

4.3. Email Content

Under the email content tab, you can set up a default email that will be sent out at different stages in the process, including a Rejection email, an Interview email, and a Post-Interview rejection email. To learn more about setting this up, visit our section on contacting applicants.
This is an excellent feature if you are interviewing a large number of candidates for similar positions across the year. Templates are great for saving time and can also be set within the portal settings under 'Email Content' rather than just on a position.
To set up a response for successful candidates, navigate to our "Successful Applicants" tab.

4.3. Position details page

This details page is where you can inform all potential applicants about the position, what they should expect when working with you and any information they should know about the application process.

You can provide any amount of text and images to create your page. On larger screens, the page is formatted into two columns: one wide column followed by a narrower column. The main column is designed for the bulk of your content, whereas the side column is perfect for organisation information, file downloads, and more.

You can create complete bespoke content for the entire page, or you can use template blocks to insert pre-written text and images into your page.

4.3.1. Template Blocks

Template blocks are reusable blocks of text and images that you can include in the details pages of any of your positions.

They allow you to write the content once and reuse it in multiple places. Updating the template block will update the content for all the places it's used. This is perfect for information about policies or the application process, so you don't need to rewrite this every time.

Template blocks are also where you can add documents for download. You can add and edit blocks under Recruitment > Settings > Template Blocks.

To add a block to your page, use the Template Blocks icon in the editor menu and choose which block you want to include. This will insert a code into your page, such as *##block-example##*

Do not edit this content, or the block will not be displayed. You can remove the block by deleting the whole text, including the four #'s.

4.4. Archive Positions

From the Position list page, you can archive completed/filled positions. Simply find the option under the More button. This will keep your position list small and relevant.

You can access the Archived Positions from the Actions menu. From this list, you can reinstate the positions or duplicate them for further use.

5. Accepting Applications

5.1. Public Site

The public site is always accessible and displays all available positions to visitors. This site also allows applicants to log in and view their past applications, as well as the status of any recent applications.

5.2. Applicant Code

To access their existing applications, applicants need to enter their email address and applicant code.

The code is emailed to them the first time they provide their email address. They can also re-request their code from the login page at any time.

Once an applicant has a code, they will be required to log in whenever they apply to a position. This is to ensure all applications are in the same place and applicants don’t need to log into different accounts to see different applications.

5.3. Automatic Save

The application forms automatically check and save all validated answers as they are provided. As soon as a green tick is shown next to the answer, the details will be successfully checked, encrypted, and saved.

5.4. Submitting Applications

An application is only accepted if the person completes all required questions and clicks the submit application on the summary page at the end of the form.

If the application is not submitted, then it will not appear for shortlisting.

If allowed, applications can be amended. Their application remains submitted, but any changes are accepted on the application and stored as they are made. No further action is needed to submit the application if it is being amended after being submitted.

The system will automatically email a reminder to all applicants who have not submitted their application forms 24 hours before the closing date/time.

6. Shortlisting

This is the normally dreaded process of reviewing all applications and creating a shorter list of applicants you would like to meet for an interview.

The tools here have been created to help minimise the administration and organisation required to successfully and fairly shortlist your applicants.

6.1. Creating Shortlisters

The shortlisters are critical to your application process. These are the staff members who will review the blinded application forms, provide feedback, and make decisions.

The way these shortlisters will shortlist the application forms is set within the position details.

When adding a shortlister to a position, you can choose their role within the process. This includes options to let them be advisors only or actual decision-makers.

6.2. Shortlisting Options

The method of shortlisting is set within the position details. Depending on how you wish to shortlist the applications, there are various options.

6.2.1. Simple/Draft

This is the most basic option. It allows each application to be marked with a draft decision before making the final decision.

Only one draft decision is allowed per application, but this can be changed as often as needed. No decision is communicated until the final decision is set.

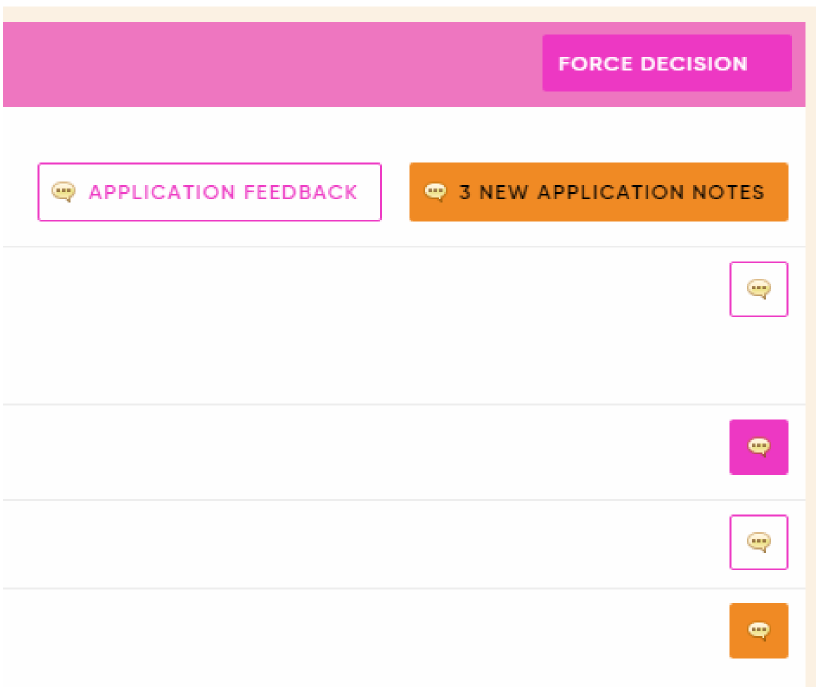
6.2.2. Score

This method allows the shortlisters to provide a score for each answer within each blinded application.
You can choose a scoring method of 0-5 or 0-10.

Using the scoring options on the questions, you can see which questions are scorable and also include weightings on them.

Once the whole application is scored, the shortlisters can submit (or “lock”) their scores. When all scores for an application are received and locked, then an average score is displayed. Applications can then be ordered with the highest score at the top, and this allows you to make decisions based on feedback from all shortlisters.

The scores can be calculated and displayed in two methods: either an average score per question per shortlister (e.g., a score of 0-5 or 0-10, based on how you are scoring the questions) or a total score, which is the total of the averaged scores for the questions. This will be a larger number.



6.3. Shortlisting & Applicant Status

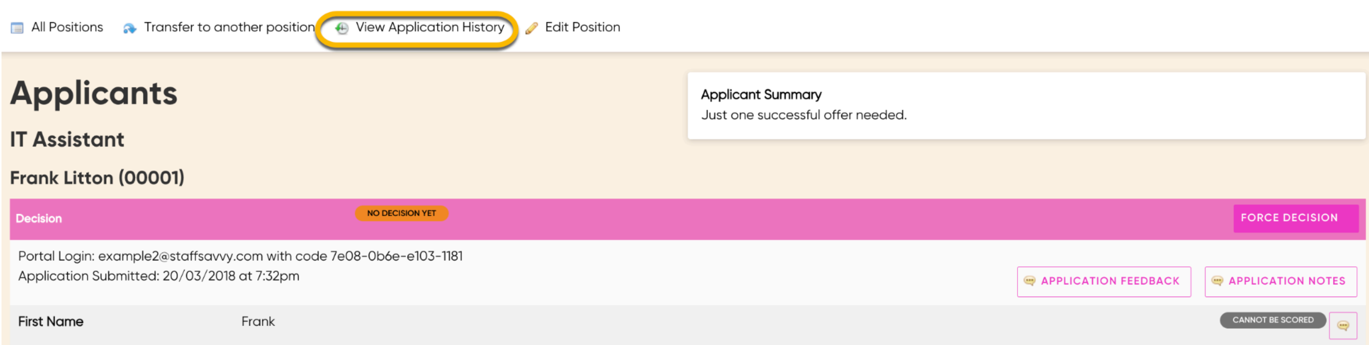
At the top of each application, you will see an Applicant Summary box. This will provide information on both the position in general and the specific applicant you are currently viewing.

The first line will display how many positions you are looking to fill; it will display how many you are looking for, and how many have been offered and accepted.

You will also receive notifications if the applicant has applied to other positions in the system. The status of their other applications will also be displayed, and if you have access, links will be provided to view those other applications.

6.4. Applicant History

During the application process, you also have the ability to see an applicant's history, including custom messages that have been sent to them.



To do this, go to the position page, click to view the applicants who have applied for the position you are interested in and click 'View Application'. From here, you should be able to see a button to view application history in the action bar, which will take you to a page listing all the developments with the application, including whether they have been invited for an interview, email transcripts and whether the applicant's application has been transferred to another position.

6.4.1. Answer memory

The system will now remember previously answered questions from the same applicant and automatically pre-fill their application forms with the same details. The question titles must match exactly for the answers to be copied.

This works well with subforms, too. This will happen automatically once you transfer an applicant, whether you clear scores or comments when transferring the application.

6.4.2. Applicants that are existing staff members

In addition to viewing the history of an application you can also see if the applicant is an existing employee (based on their email address) of your company when viewing applications.

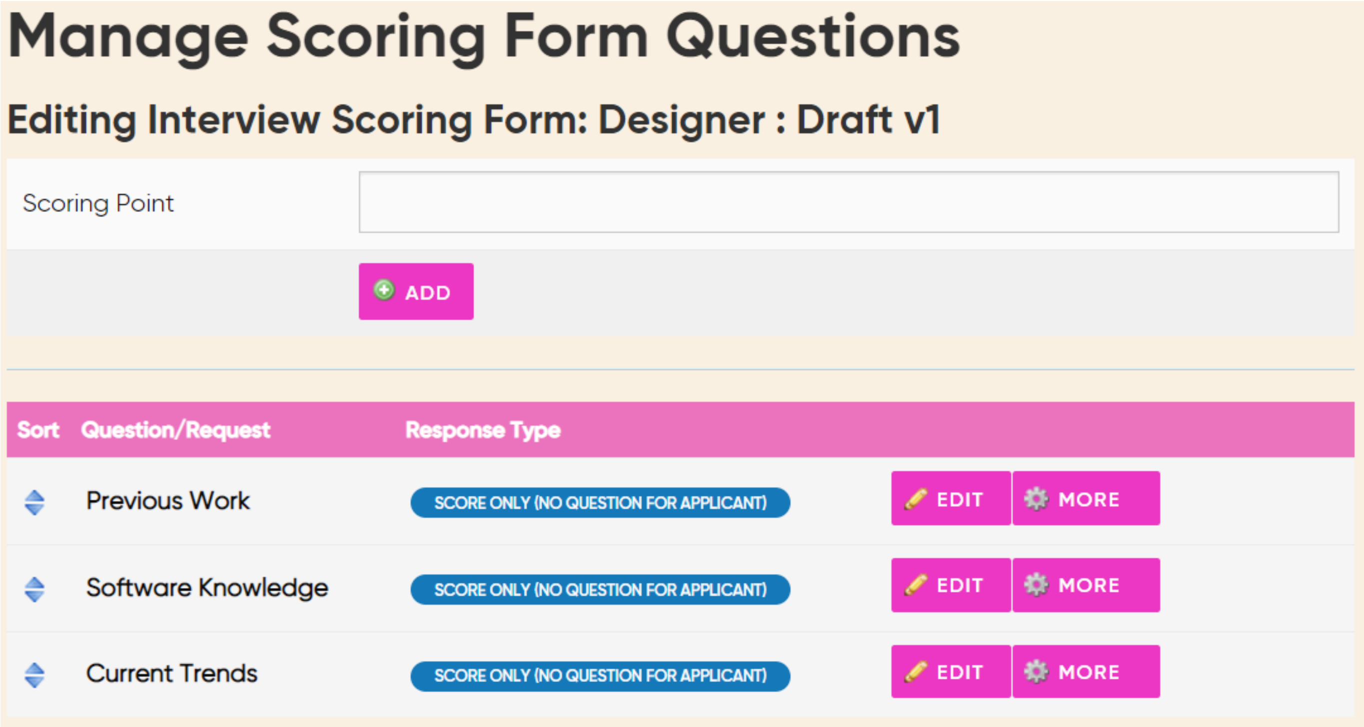
If they are, or were a member of staff you will be able to see whether they are a current staff member, a link to their staff profile and any onboarding steps they have completed will appear.It is important to note that this option is only viewable when you are not part of the shortlisting process.To use: Go to Recruitment > Manage positions > Click to view all applicants on the position you are reviewing. Then click to view a specific application. Below the decision box where you can find portal login information, there is also information about whether they have been or are a staff member.

7. Interview and Scoring Forms

Scoring forms allow for more specificity in the recruitment process in the shortlisting stage. You can create your scoring form separately and assign it to the position at any time before you start scoring your applicants.

You can assign different scoring forms for the interview process and unlimited scoring rounds to match the number of interview rounds you conduct. See these under Recruitment > Forms > Scoring Forms.

This removes the requirement for our application forms to have scoring schemes assigned before opening the position to applicants. It also means you can separate the scoring of application forms, interview sessions and more. Interview sessions can then be separated from application forms.



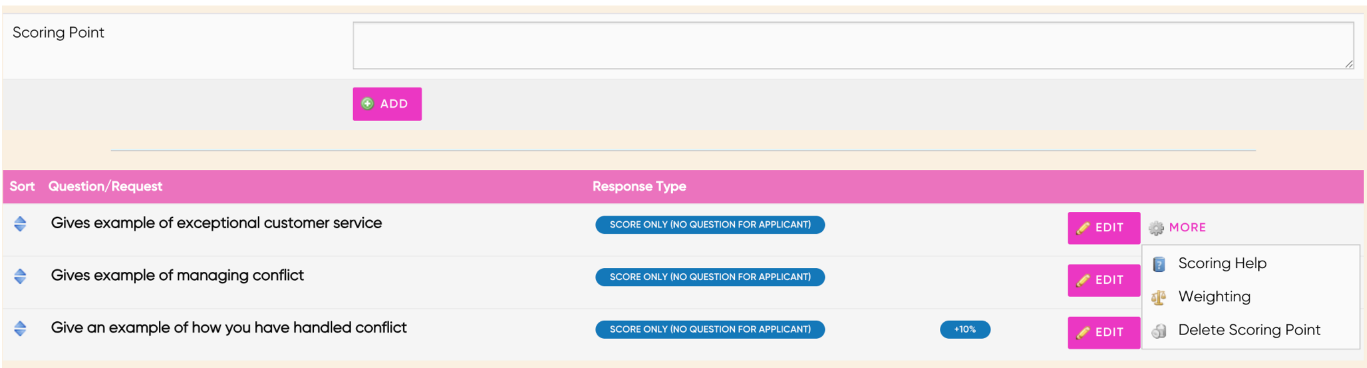
Forms can be used for both interview and scoring questions (i.e. additional practical questions not included in the application). The advantage of these forms is that applicants do not see them, only the scorer, so the scorer can mark them on questions that they don't want the applicant to see and also add interview questions that the scorer will need to mark them on.

7.1. Creating Scoring Forms

To create a new Scoring form, navigate to Recruitment > Forms > Application forms.

You can first create the title and details for the scoring form. Then you can add scoring points, which are your form questions. You can leave instructions for how each scoring point should be scored.

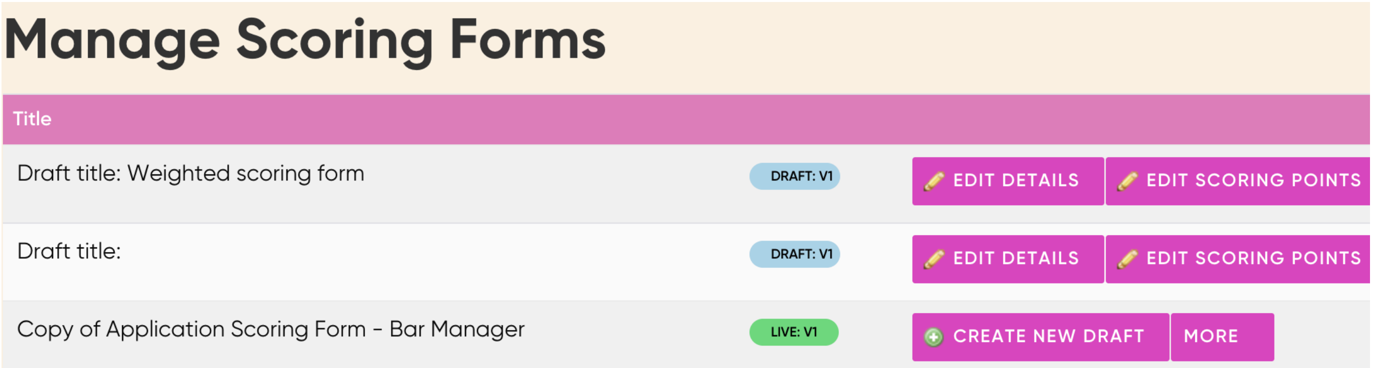
Additionally, scoring forms now support weighting against each scoring point. By applying weighting to specific scoring points, you can prioritise certain responses over others. This functionality is particularly effective for prioritising essential job requirements or key criteria that should carry more influence in the overall assessment.



Click the ‘Scoring Help’ button under the cog icon to leave information for the recruitment shortlist on how to score or if there is additional detail about what this question means.

7.2. Manage Scoring forms

Points are saved automatically and you can go back to the managed scoring forms page to review and publish your forms



Once you are happy, you can publish your draft and the scoring form will become live. To make changes to the form, you will need to create a new draft. You are able to remove different draft versions of scoring forms (found under the more button) if a draft was made in error.

To use: Go to Recruitment > Forms > Scoring forms. Under Manage scoring forms, create a new draft. Then under more, there is the option to Remove the current draft.

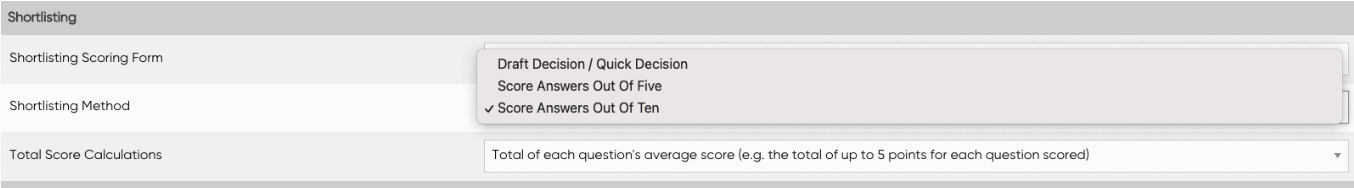
Additionally, if you click the ‘more’ button under the Manage Scoring Forms page, you can set a category for your form and create a copy of the form that has been created.

7.3. Assigning Scoring forms

To integrate Scoring forms into the application, go to Recruitment > Manage Positions. Here, you will see a list of the currently available positions being recruited. To add a scoring form, go to ‘Edit’ and go to Short Listing. From here, you can add a shortlisting form. There are three options to score the form, these are;

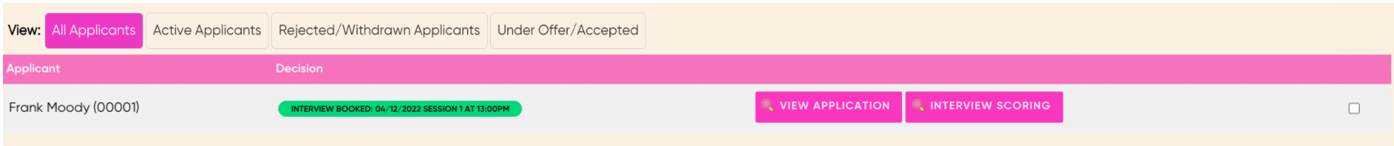
- Score Answers out of Three
- Score Answers out of Five
- Score Answers out of Ten
- Draft Decision/Quick Decision

Make sure you choose answers out of 3, 5 or out of 10 to enable the scoring forms. Choose Draft/Quick decision if you do not wish to use a scoring form



Below this, you can add an Interview Scoring Form under Interviews.

Then, from here, the Scoring Forms will appear when you view your applications, at the bottom of the application. The 'Interview Scoring' will only appear once an interview has a booked date.



By clicking on View Application/Interview Scoring, you can score answers based on the scoring system you set up in the application settings, i.e., out of five.

8. Comments

Comments can be added to an application at any time. They can be added to the application as a whole or to any of the answers within the application.

The system will track when you have seen each of the comments and will alert you to new comments with an orange icon next to each application. Once in the application, you will see where the comment has been hidden based on the orange button colour.

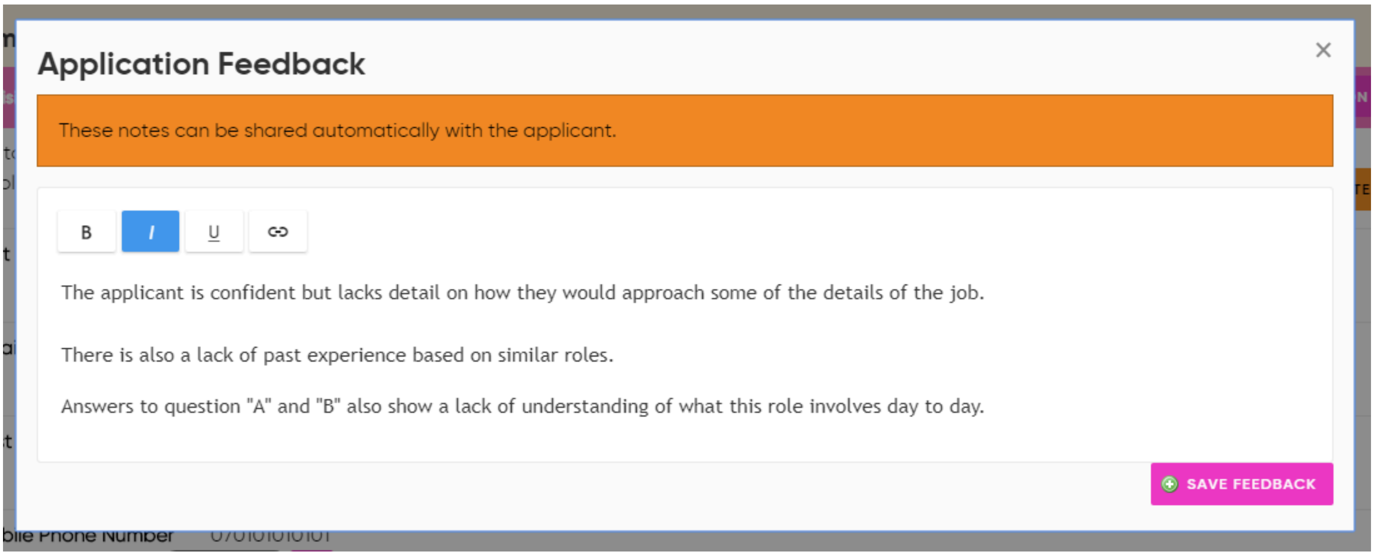
Once read, the comments buttons will turn blue. If there are no comments, then the button will be grey.

Comments are often used throughout the application process and can also be used to hold comments on the interview.

They can be used to provide feedback to rejected applicants on request.

9. Application Feedback

This allows shortlisters to add notes to an application as decisions are being made. Feedback notes can be added to the application detail page at any time during the shortlisting process. The button is next to the Application Notes button at the top of the application.



This will open a window displaying the notes currently stored in the application. This is only one set of notes per application, so all shortlisters or managers with access to the application can view and edit.

It's important to note that the application feedback can be set to be emailed automatically to any unsuccessful applicants.

9.1. Including notes within rejection emails

If allowed, the system will automatically include these notes in the rejection email content. This helps to provide feedback to applicants automatically rather than requiring them to get in touch.

To include the notes on the rejection email, simply include the text "#feedback#" in the email template, either on the portal template or within the new position email template. This will also include some text so that the email will show a blank space if there is no feedback.

If feedback has been provided on that application by shortlisters during the application process, then it will turn into the following:

"We're sorry that you have been rejected from this position.
#feedback#"

Into:

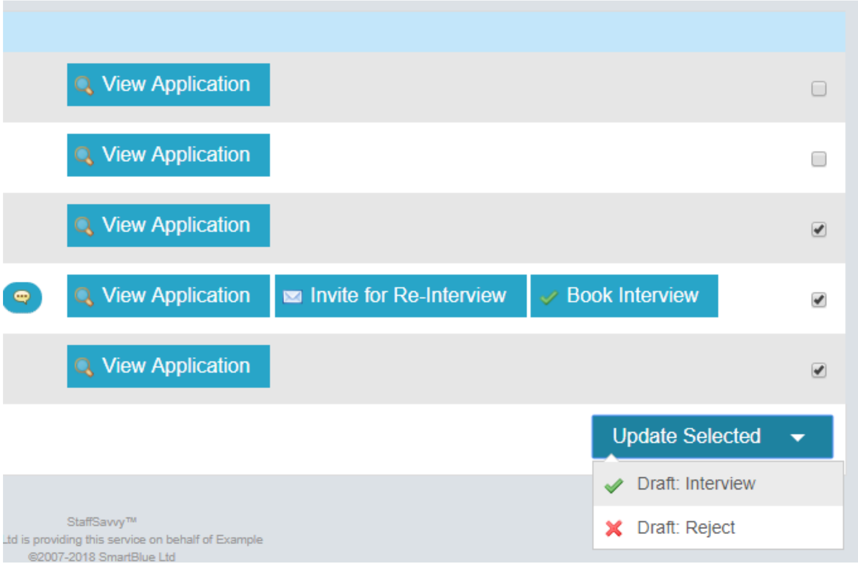
“We’re sorry that you have been rejected from this position.

Feedback on your application:
It could have been better if…”

10. Draft and Final Decisions

Regardless of the shortlisting type, shortlisters will need to make decisions on each application.

Draft decisions allow shortlisters to indicate decisions while reviewing all applications before making confirmed decisions. A draft decision is only shown internally and never to the applicants. You are also able to remove draft decisions and set them back to a ‘No draft decision’, if a draft decision has been made in error. This applies to scorers or decision makers.



There are two ways to record a draft or final decision on an applicant: at the top of the application form or in bulk from the list of applications. Use the selection boxes on the right side of the page to select the applicants you wish to update.

An update box will appear at the bottom to allow you to either choose to create a new draft or make a final decision. The Offer Employment step is the only decision that cannot be completed in bulk. This is currently only available within an application.

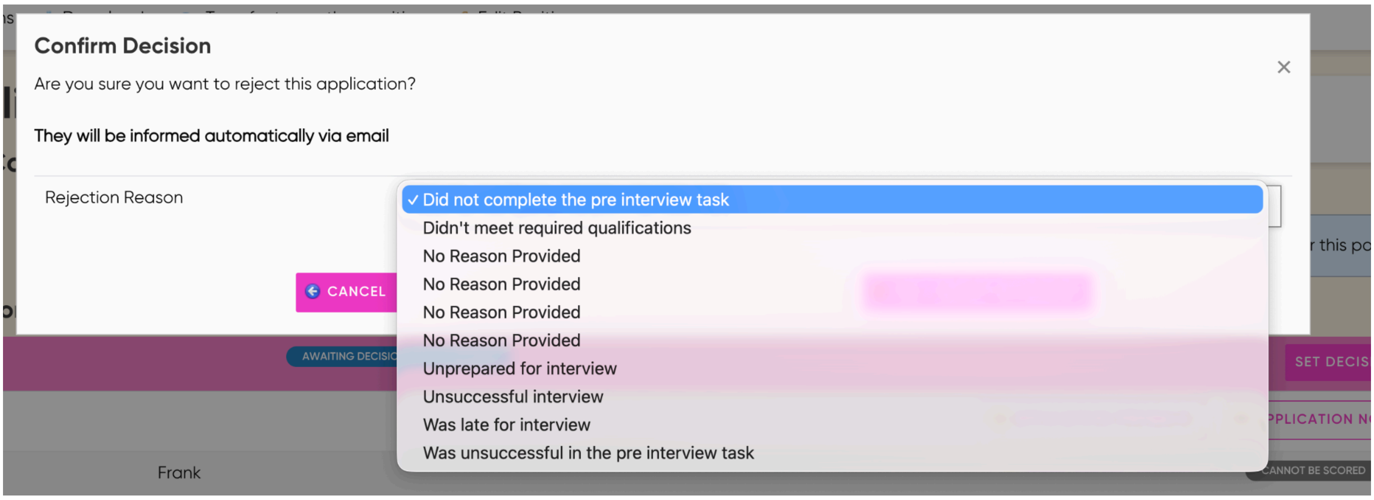
10.1. Reject Process

By default, any rejected application will automatically receive a rejection email with your messaging. You can set default messages for the whole recruitment portal under the portal settings. You can then override this on the position and include more specific details for that role.

Using the application notes, you can also include feedback to the applicant on why they were rejected.

10.1.1. Rejection reasons

When you reject an application, you will be able to add a rejection reason. You are able to create a set of reasons which you can choose from. This helps standardise rejection reporting.



To create a rejection reason go to Recruitment > Settings > Recruitment reasons and create a new reason.

10.1.2. Silent Rejection

There are occasions where it might be insensitive to email the applicant about their rejection. This might be due to personal circumstances or communications with the applicant outside of the portal.

A silent rejection option is available to recruitment managers (not shortlisters) who can silently reject the application. This will not email the applicant.

10.2. Unreject / Restore Applications

It might be necessary to restore applications that have been rejected. This might be due to an error in rejecting the application, or when all of the shortlisted applications are not suitable, and you need to widen the shortlisting process.

On a rejected application, you have the option to unreject it. This will restore the application to the submitted state.

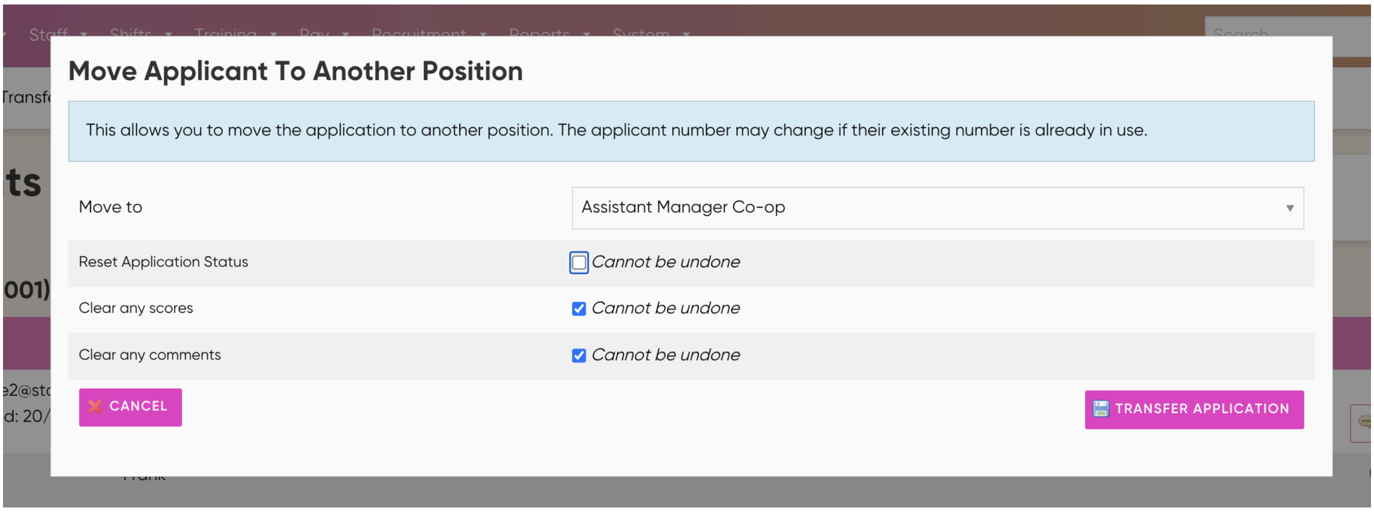
By default, we'll inform the applicant that their application has been restored. However, you have the option to restore silently. This will restore the application to its original state, but it will not send an email to the applicant.

Please be aware that if the applicant logs into their recruitment portal account, the application will appear as active rather than rejected.

10.3. Transfer Applicant

If required, you can transfer the application to a different position within the system. This allows applicants who have applied for one position but are more suitable for another position to be transferred.

This will simply change the position the applicant has applied to; their application form will remain unchanged, and they won't be asked to complete any other questions. This applies unless you are transferring a candidate to another position. Then you can choose to reset the application status and application scores.
To transfer them, view their application and see the 'Transfer Application' option in the Actions menu.



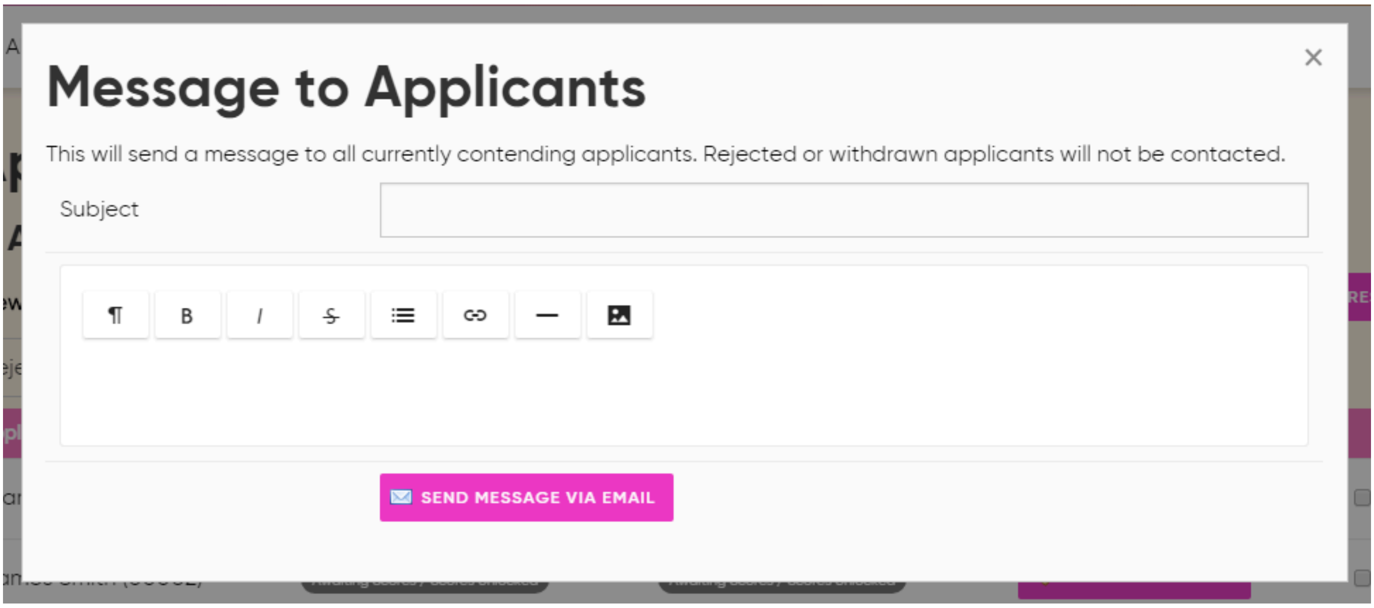
You can do this by viewing an application and clicking the 'transfer to another position' button in the action bar.

You can then choose what you would like to keep and what you would like to reset, including scores and application status. You also have the option to remove comments that shortlisted applicants or those reviewing applications may have included if they are irrelevant to the other position.

11. Contact Applicants

You can contact the applicants directly via email whenever you need. This option is in the actions menu at the top of the page.

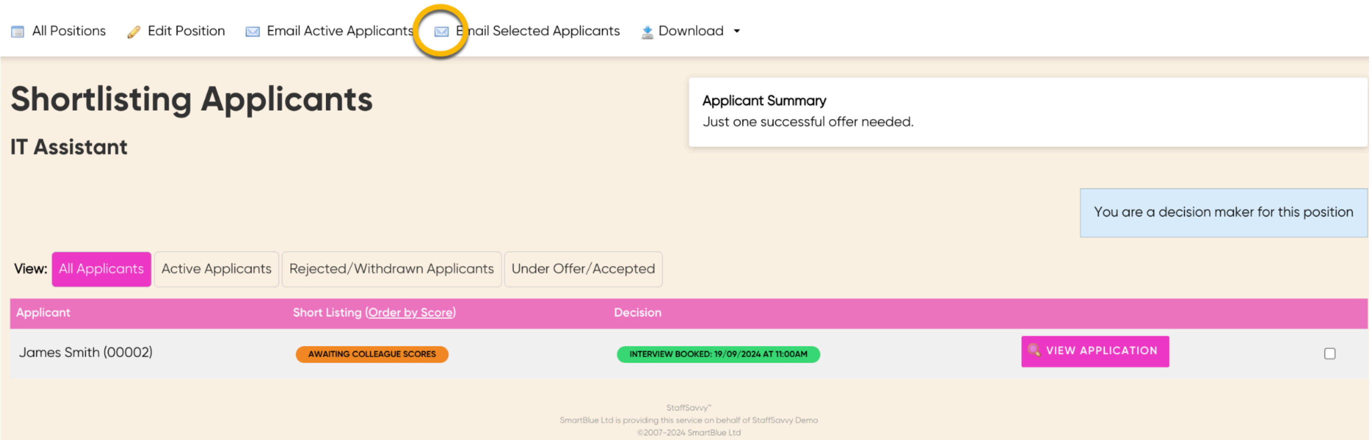
Simply add the subject line and email content. The message will be dispatched almost immediately and a full history of all emails sent is recorded in the system.



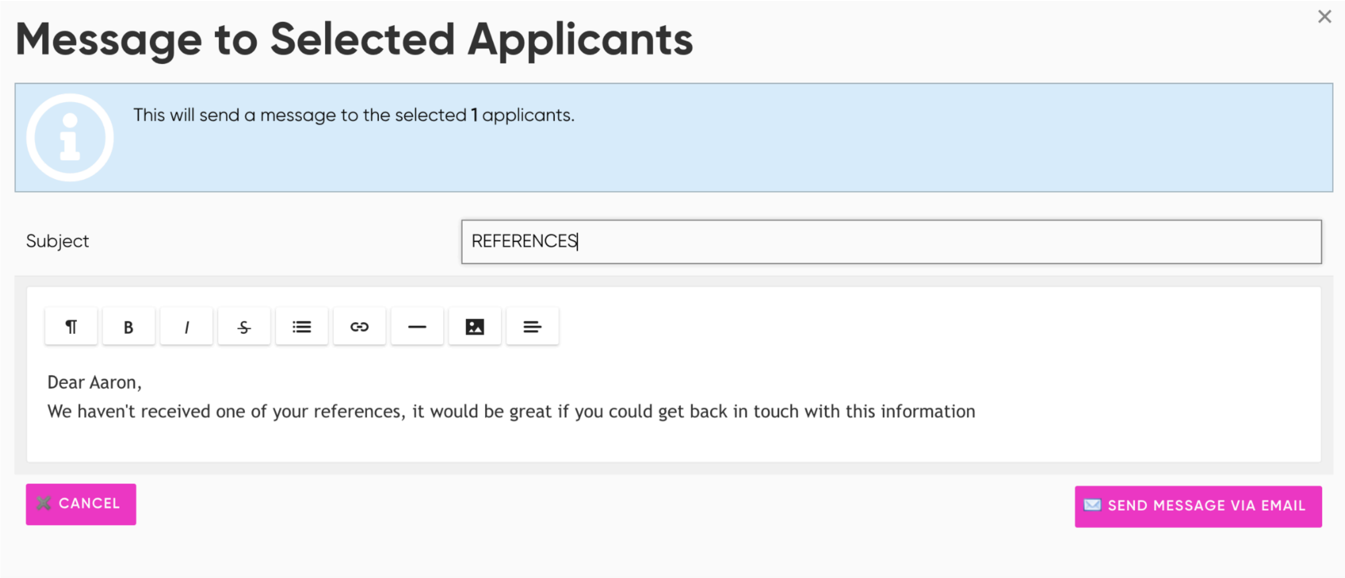
11.1. Email Selected Applicants

This new option allows you to email an applicant about specifics you would not want to send to all applicants, for example, if you were waiting for some missing information in their application.

First, you need to view all applications. Then, use the checkboxes down the right side of the page to select the applicants you wish to email. Then click the Email Selected Applicants button in the Actions menu at the top.



You must write out your email subject and content before finally sending the email to selected applicants.

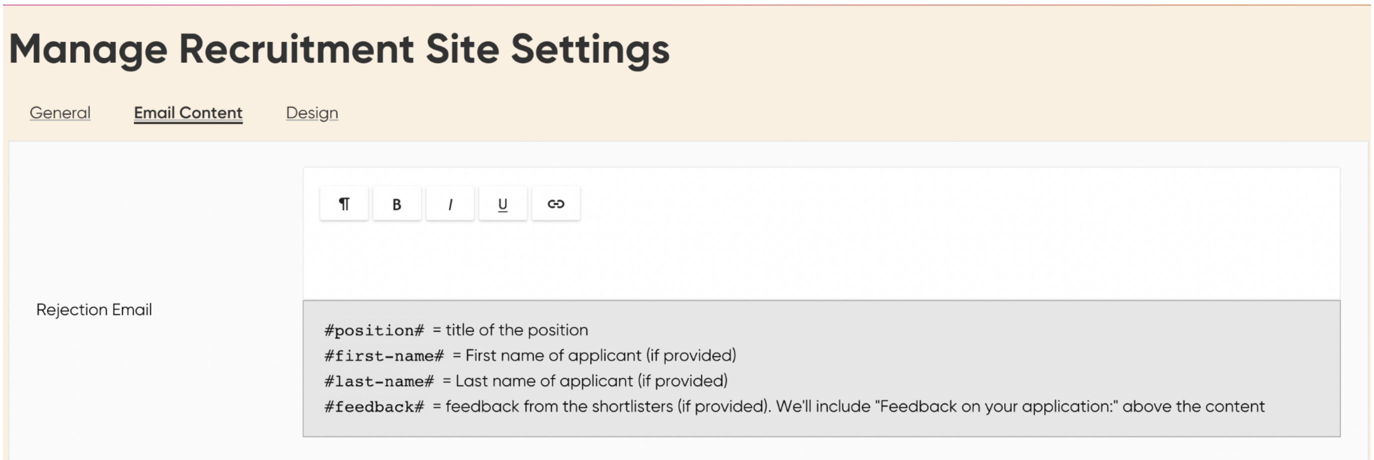


12. Set a default post-interview rejection email

Another option you have is to set up a default post-interview rejection email. This is a great feature if you are interviewing a large number of candidates for similar positions across the year.
Templates are great for saving time and can now be set within the portal settings under 'Email Content' rather than just on a position.

This rejection email template includes dynamic formatting options to create titles in your emails, including;

- Position
- First Name
- Last Name
- Feedback



Additionally, post-interview Rejection email templates can now be set within the portal settings rather than just on a position. Set this default template under the Portal Settings within the Recruitment menu.

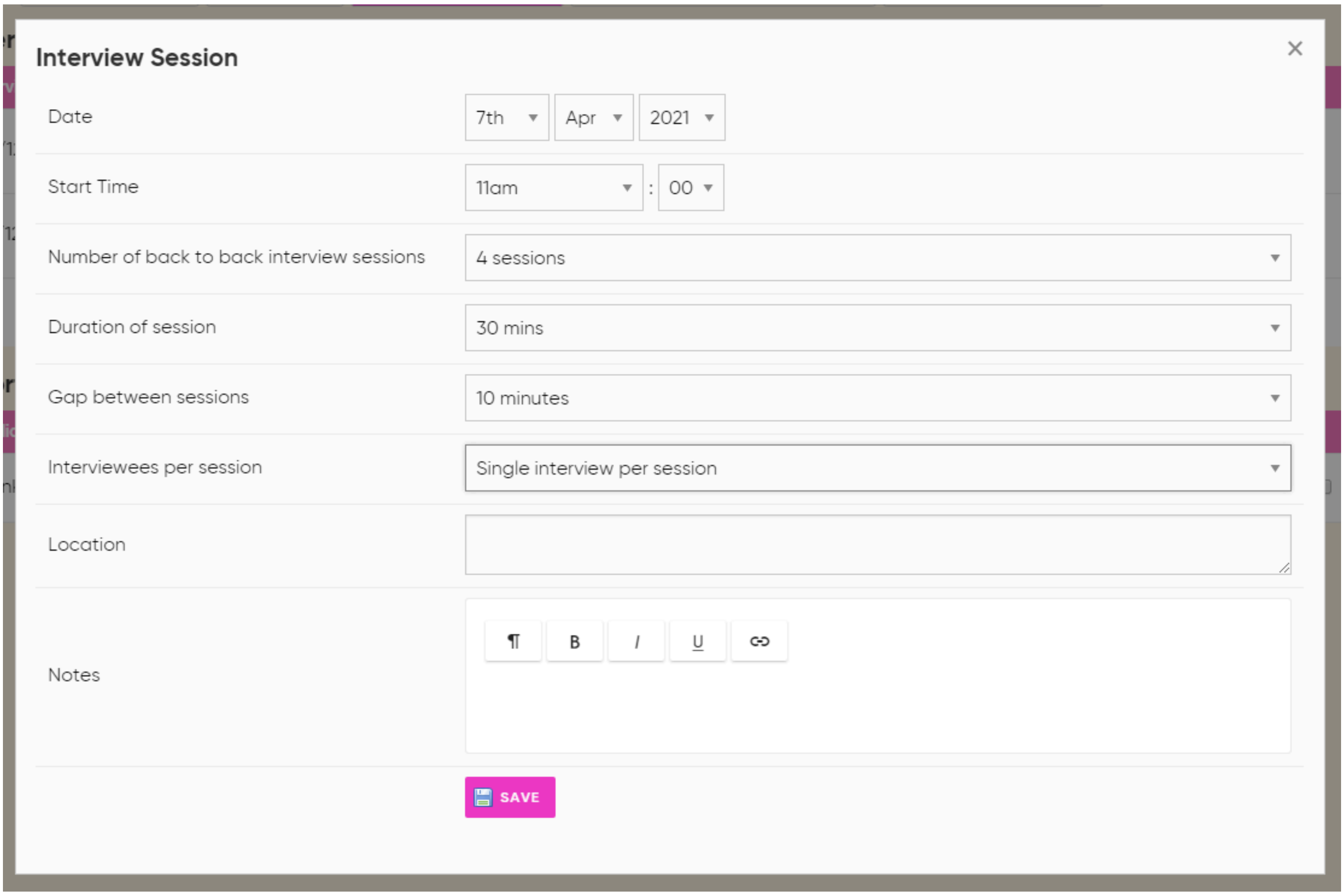
13. Interviews

One of the more exciting parts of the recruitment process is that we've tried to make it easy and simple or organise interviews for many potential employees simultaneously.

13.1. Create Interview Slots

An interview slot is a fixed time and date when one or more applicants are expected to be interviewed.

When creating a slot, you will be asked for the date and start time of the first slot. You will then be asked how many slots you want in that session, how long each slot is, and if you wish to have a gap between slots. You also set how many applicants will be interviewed in each slot.



The system will automatically create the slots based on the durations and gaps requested. For example, three slots of 1 hour long interviews, with a 15-minute gap between them, starting at 9am, will then create the following:

- 9am - 10am
- 10:15am to 11:15am
- 11:30am to 12:30pm

If you wish to have a longer break (for lunch, for example), then simply limit the slots for the morning session and add another new interview slot after lunch. You can enter the location of the interview and long-form notes for each slot. The notes will be displayed once the applicant has selected an interview slot.

Once you have saved these details, you can edit the interview details throughout the process, even once slots have been booked. Simply go to your active applicants and click edit details.
Once the changes are saved, all applicants will receive an email update with all the changes to the interview details.

13.1.1. Blocking out Time Slots

You can also block out an individual time slot within a whole run of interviews that can be set aside for breaks. So, if, for example, you are running six back-to-back interviews that are 30 minutes each and there is no gap between each interview, you can now block a slot so that that period of time remains empty.

This can be helpful if you are running back-to-back interviews but want to create a specific period of time for a break. To use it, go to your active applications, click the details on one of your sets of interview slots, and choose the time period you want to be blocked.

Interview Slots

Date	10/09/2024
Location	HR Office
Notes	One HR personnel to be present for all interviews.
Duration per slot	40 mins
Gap after interviews	None

Time	Number of spaces	Available	Booked?
08:15am	1	SLOT AVAILABLE	Block Slot
08:55am	1	SLOT AVAILABLE	Block Slot
09:35am	1	SLOT BLOCKED	Unblock Slot
10:15am	1	SLOT AVAILABLE	Block Slot

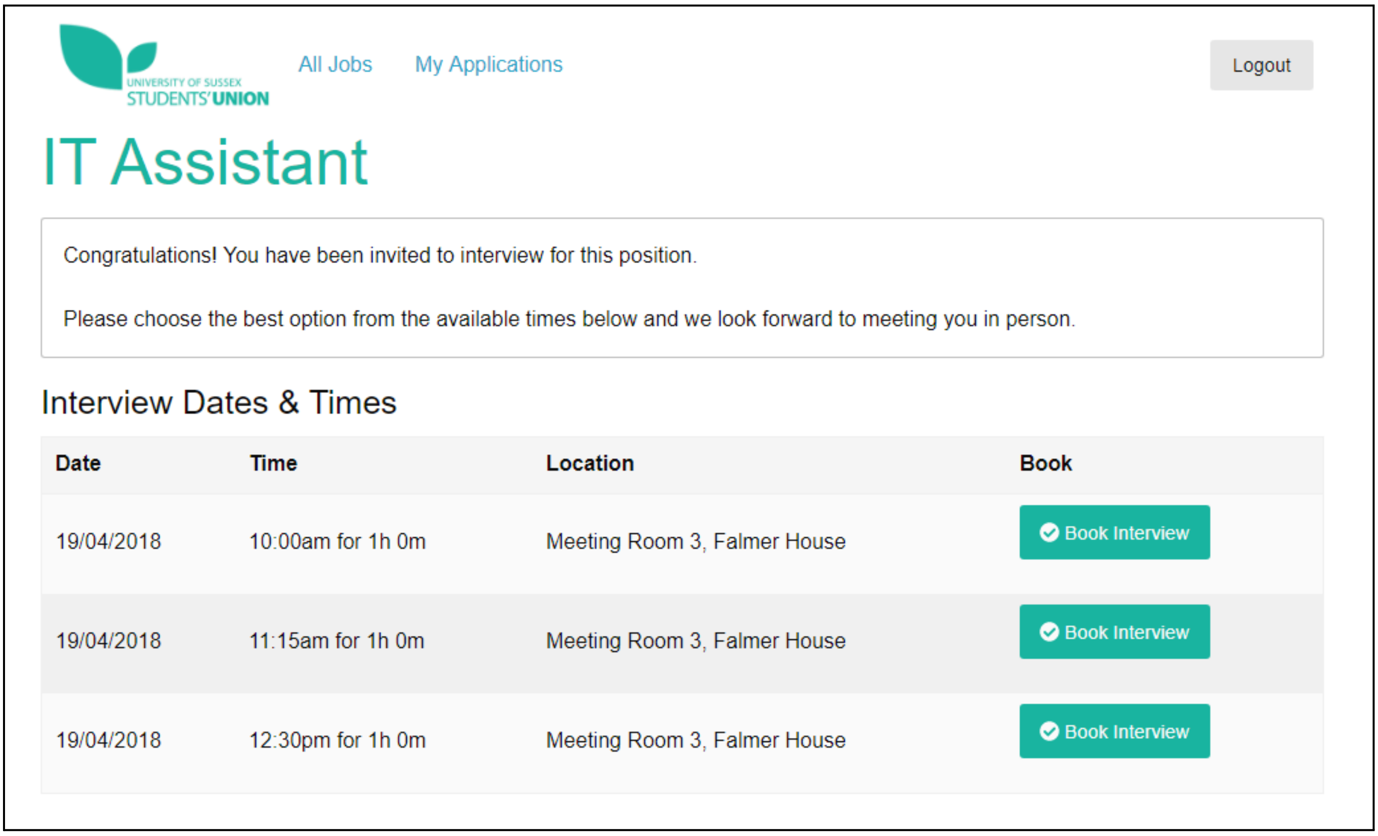
13.2. Invite to Interview

You can invite applicants to interview individually or in bulk. The bulk option will send invitations to all eligible applicants if their draft status is 'Suggested Interview' (e.g. they have an individual invite button next to their application).

This will email the applicant to invite them to select an interview slot. You can edit the text of the interview email under the Portal Settings page.

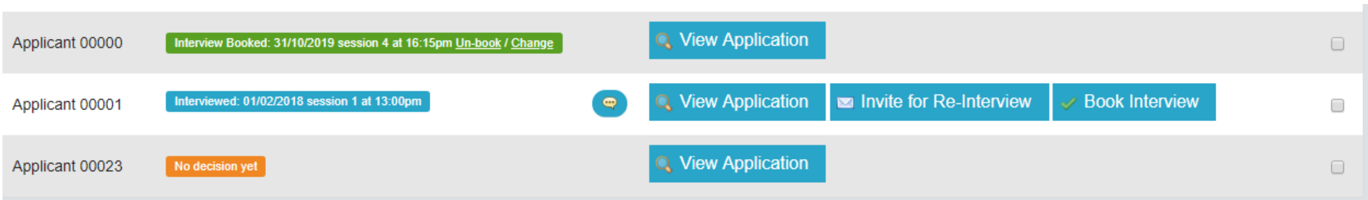
The applicant will need to log in with their email address and unique applicant code (they can re-request this if they have lost it). They will then be shown all of the available interview slots and will be asked to confirm which they can attend.
When choosing an interview slot, the applicant can now withdraw their application rather than making a choice.

Once selected, the system will display a confirmation pop-up with all of the available information: date, time, location, and notes section. Once confirmed, the applicant's slot will be shown on your shortlist dashboard, and we'll email the applicant their interview details.

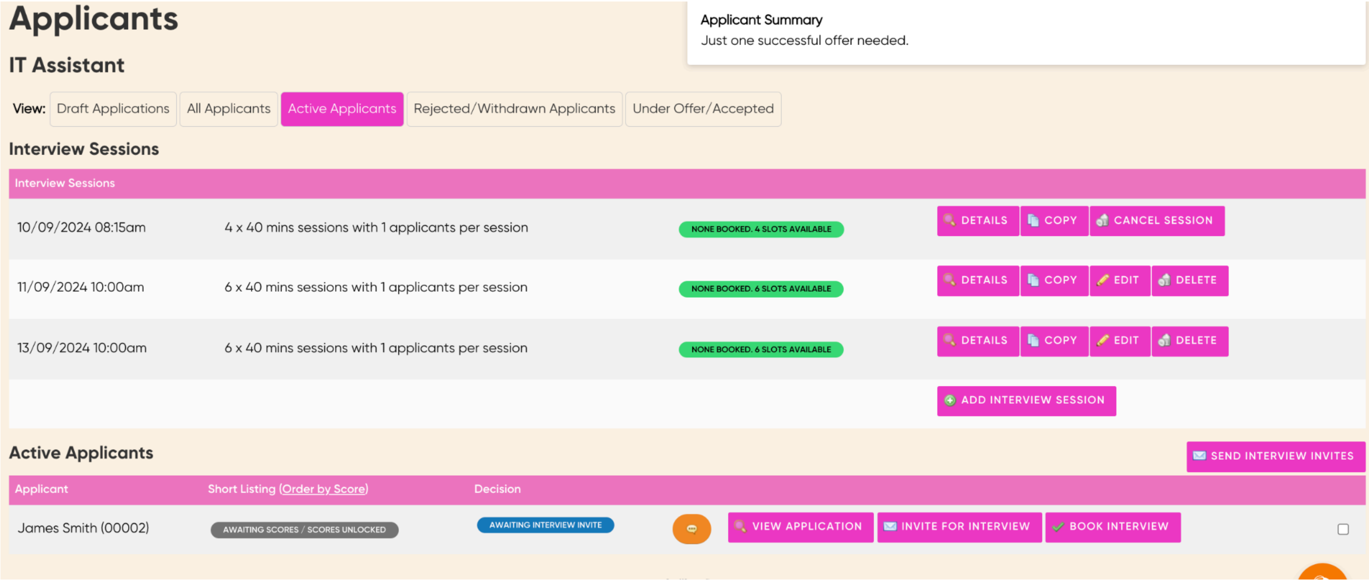


13.2.1. Manage Interview Booking

Once invited to interview, a manager can also choose the interview slot for the applicant. This is shown as 'Book Interview' next to the 'Invite to Interview' button. The example below also illustrates a re-interview process.



Once an interview is booked, you can unbook it (so the applicant can book a new slot) or pick a new slot for them. Both of these actions will email the applicant immediately with either the rebooking instructions or the interview details.



13.2.1.1. Missed interview

If an applicant misses an interview you are able to mark this to help create clarity in your interview process. Once they have been marked as having missed an interview, the application decision becomes a missed interview and they will no longer be an active applicant unless you re- invite the applicant for an interview.To implement this will click to view a specific applicant's application, then under the decision button there is an option to select Missed interview.

13.2.1.2. Exporting interview application

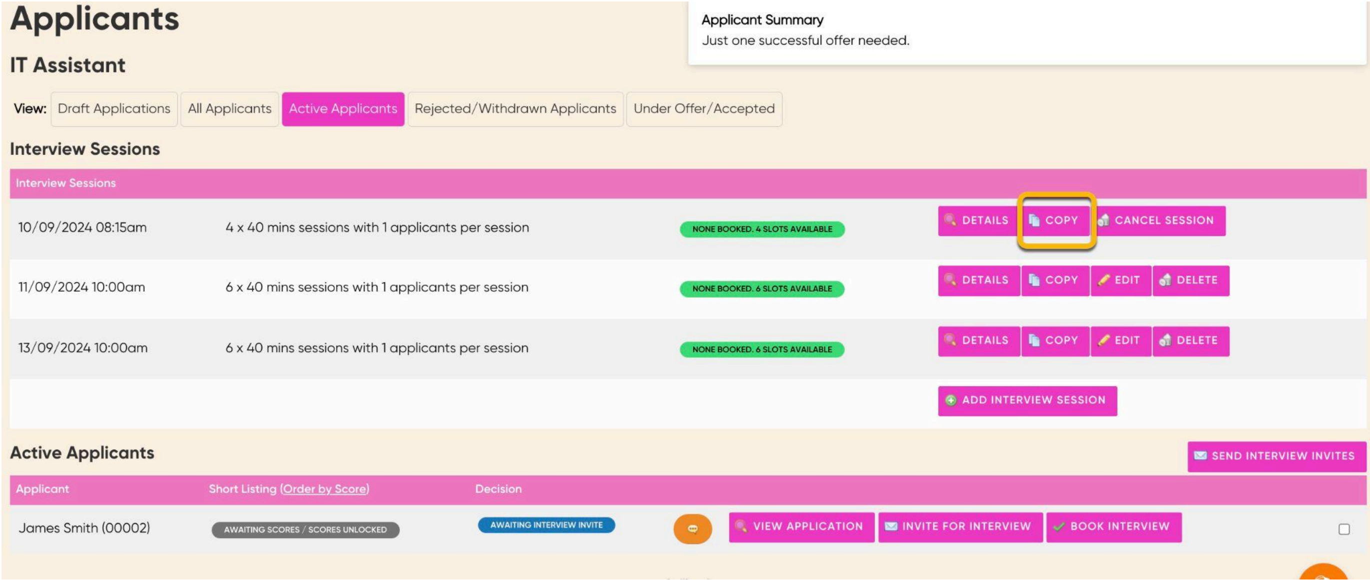
You also have the ability to export all application forms for an interview session to PDF. Once downloaded you will be able to see relevant information about the applicants.

13.3. Reinterview

If desired, you can request an applicant re-interview. Simply add new interview slots and then send the re-interview email. This button will be shown next to the applicant after their booked interview date.

13.4. Copy Interview Slots

If proceedings or the calendar change, you can quickly copy interview slot details to another day. To do this, you will see all the interview slots created under your active applications. Then, click to copy the application.



Click to copy the application. You will then see all the details from the interview slot that has already been created. You can then choose an alternative date, and a new set of interviews will be scheduled. This can also be useful if you have more applicants and simply want to create another day of interviews with the same details, reducing admin time.
You can also delete the other interview slot dates if you no longer need them. The applicant will be emailed about rebooking their interview slot. It is worth noting that you cannot copy to the same date, as the system will assume that these slots already exist.

14. Job Offer

Once the interviews (and re-interviews) are complete, you can then make your final decisions.

If you choose to offer the job to an applicant, they will be emailed the good news and will be requested to login to accept or reject the offer. When an applicant is offered and accepts the role, StaffSavvy will create a staff account within your main site. It will copy over all fixed answers (name, email address, phone, DOB, etc.) plus any documents they have uploaded.

You can edit the content of the offer under the position details, which can include mail-merged information. If you have selected a contract to be assigned under the position's successful applicants tab, you can include salary information, start dates, and expiry dates. Note that salary information is only available to be set if the contract allows salary as its remuneration.

You also have the option to delay staff member access to the account for the new hire until the start date. This option will create the staff account as normal, but they will not be granted access to their account until their start date. To use this option, select it when offering a position to a staff member.

There are different options on how much access applicants might receive, including giving immediate access as soon as the offer is sent or giving hires access to the account only on their start date. Other options are not giving hires automatic access to their account, but allowing new hires to be given access later by their manager.

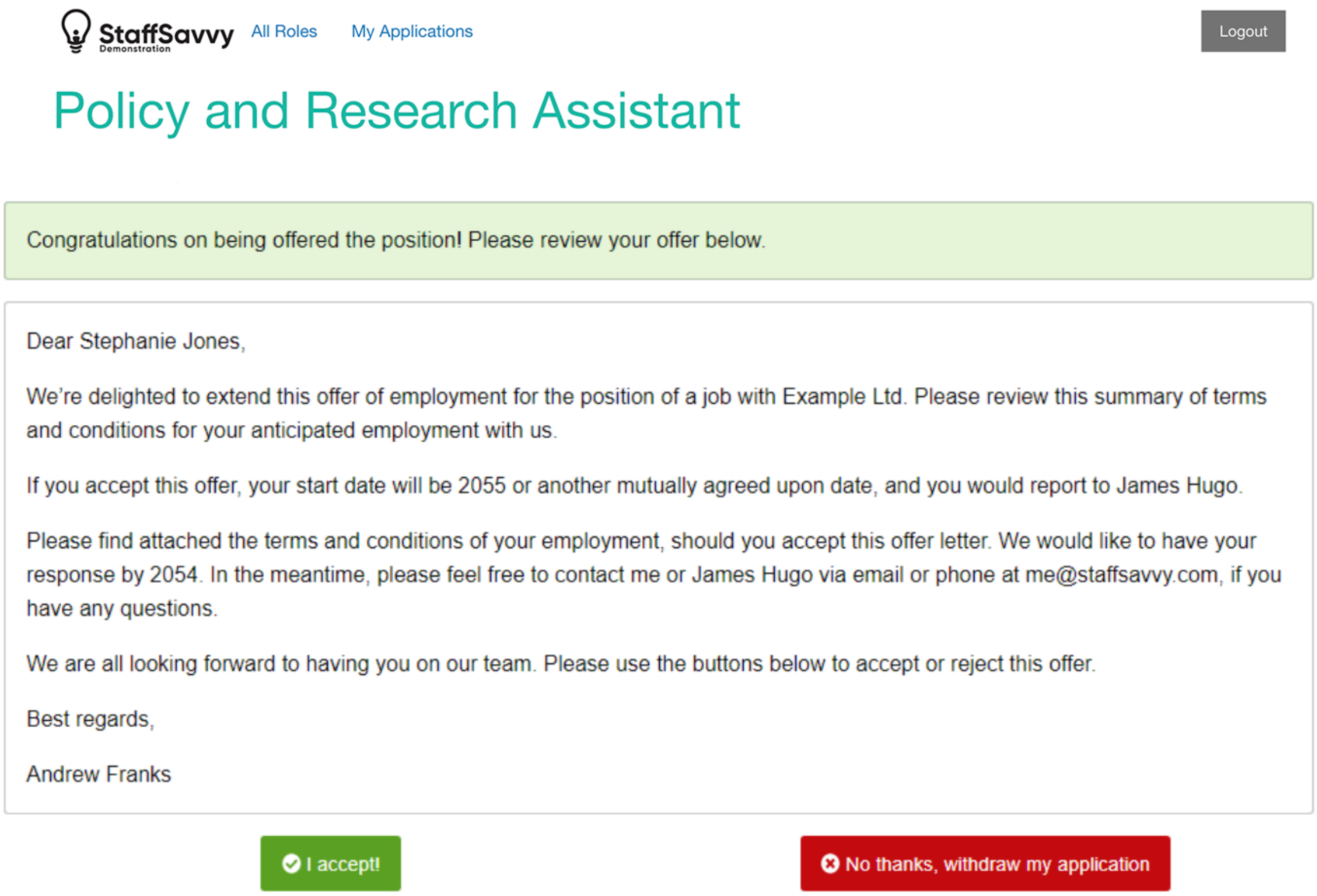
- **Create a new account and give instant access or update their existing StaffSavvy account**
- **Create a new account and provide access on their start date**
- **Create a new account, but do not provide access automatically**
- **Automatically accept the offer, create an account, but do not send the invite automatically**
- **Do not create or update StaffSavvy account**

Depending on the option you use, once given access, the staff member will be emailed a welcome link and temporary password to launch them into your main StaffSavvy site. They will then start your normal onboarding steps and any requirements set for their required roles. No further authorisation is needed for the account.

If you choose the option to grant access on their start date, the system will automatically send them a welcome email on their continuous employment start date. Once the applicant accepts the position, their account will be created within the main StaffSavvy site, and their induction/onboarding will begin.
If you do not wish for the new staff member to have immediate access to the system, when offering a position under the Create/update StaffSavvy Account option, you will see the option not automatically grant access to their account.

The applicant's decision will be displayed within your position shortlist. You can also set an expiration on a job offer, so that an applicant must accept or decline a position within a certain time period. This means that the applicant will have a certain amount of time to accept a position before the offer will be automatically rejected. You can set a date and time for the expiry.

If you reject the applicant, they will be informed via email. They can also reject your job offer or withdraw their application at any time, which will remove them from your shortlist.



StaffSavvy Demonstration All Roles My Applications Logout

Policy and Research Assistant

Congratulations on being offered the position! Please review your offer below.

Dear Stephanie Jones,

We're delighted to extend this offer of employment for the position of a job with Example Ltd. Please review this summary of terms and conditions for your anticipated employment with us.

If you accept this offer, your start date will be 2055 or another mutually agreed upon date, and you would report to James Hugo.

Please find attached the terms and conditions of your employment, should you accept this offer letter. We would like to have your response by 2054. In the meantime, please feel free to contact me or James Hugo via email or phone at me@staffsavvy.com, if you have any questions.

We are all looking forward to having you on our team. Please use the buttons below to accept or reject this offer.

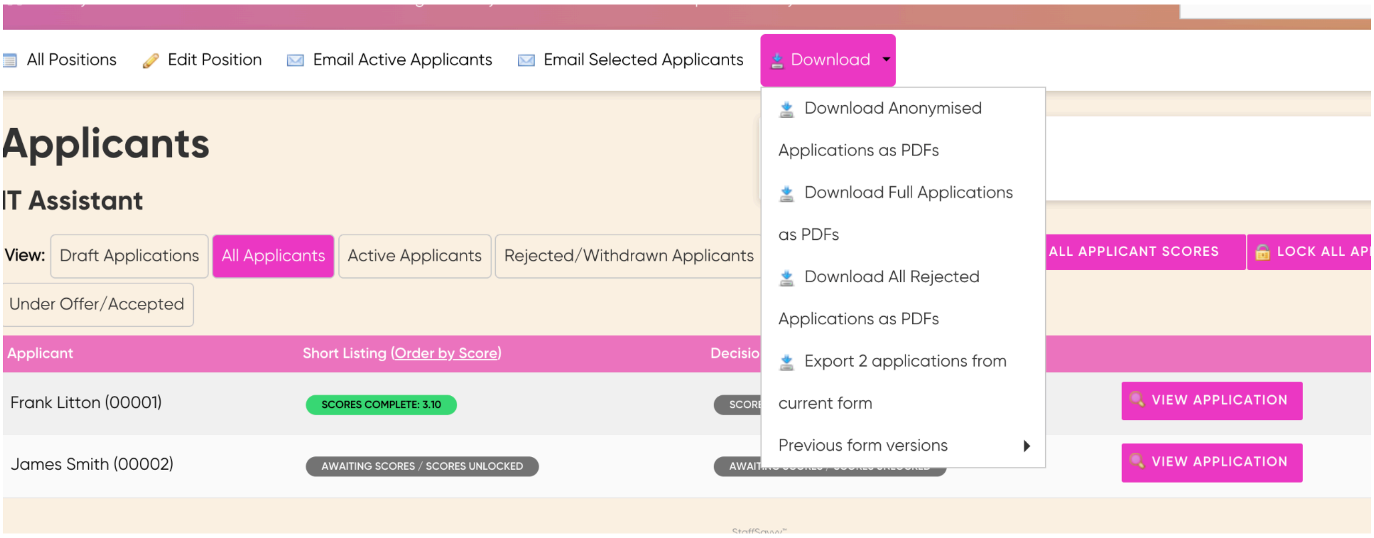
Best regards,

Andrew Franks

I accept! No thanks, withdraw my application

15. Exports, Downloads & Reports

These are all available under the Downloads button when viewing the applications.



15.1. PDF Exports of Applications

You can export either the full, unblinded application forms or the automatically-blinded application forms when viewing the applications for a position.

This will generate PDF versions of all of the applications for you within a downloadable zip folder. Please note that any uploaded documents cannot be included in the export, so it's best suitable for fully-digital forms.

You have several download options available, including downloading an anonymised version of all applicants, all applications or all rejected applications. If you select the option to download the full application this will include the date of the employment offer and a date of decision by the applicant.

If you select the View Application button next to a single application, you are also able to download a single application. Rather than downloading all the applications simultaneously, you can view a single application in PDF format, which is helpful if you want to view an application from a specific applicant.

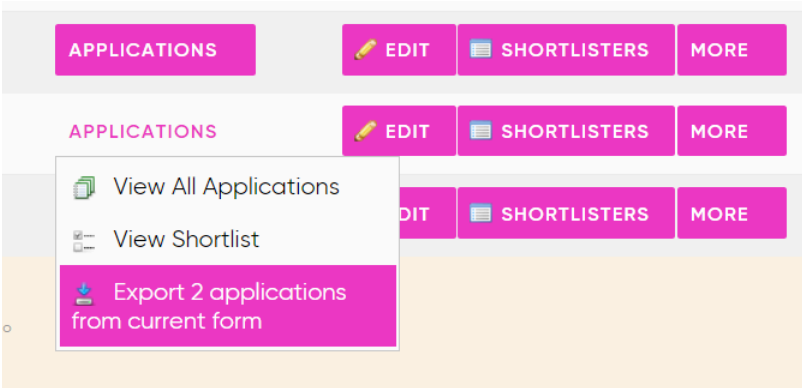
15.2. Excel Export of Applications

Under each position on the main position management page is the option to export the applications.
This will create an Excel formatted file with all of the applications and answers to all questions (blinded and hidden included).

It is designed for use only in data analysis and not for any shortlisting purposes. Please ensure that any data you export is correctly protected and stored in accordance with your data privacy statement.

The exported file will include the current status of the application and a column on how far through the process the applicants have reached. The final status might be rejected, but their application might have reached the 'interview requested' stage as their highest status.

If you have made changes to the application form during the application period, then you might have applicants answering different versions of the form. The export option will export these applications into different files so that questions and answers accurately match those at the time of application.



15.3. Recruitment reports

In addition to being able to download your application data, you can also create reports, so you are able to get a summary of everything you have been managing in recruitment. You can quickly see summarised data of candidates which can be helpful for HR to keep track of. Currently, two types of recruitment reports are available. You can set these up by creating a new custom report, choosing "Recruitment Applications/Positions" as the report type, and selecting the appropriate data fields and columns.

- **Recruitment (Positions)**
  Displays positions that the company is currently recruiting for. Columns can be added to show the number of spaces available for each skill and how the recruitment process is progressing.
- **Recruitment (Applications)**
  Display applicants that the company is currently recruiting. Columns can be added from the application including adding dates relevant to the application, and also the applicant's details, including their name, the current status and the Position Applied For.

16. Settings

In addition to creating scoring and application forms, there are other settings that can be created in advance of creating a position.

16.1. Rejection reasons

You can now create a series of standardised rejection reasons and select them when rejecting an application. Once created, they will automatically come up as options to choose when rejecting an applicant. This is to help standardise rejection reporting.

16.2. Locations

You can also create locations. These might be a series of locations of various offices you manage and hire for. You can create these locations and once created, you can select from a drop down when creating a position. Then, once the position has gone live, the location will appear at the top of the position page in the recruitment portal. Optionally you can display these with a filter option on the public portal. This helps standardise Indeed integration too.

If you have any feedback or require additional help, please contact us directly at support@staffsavvy.com

