



# **Recruitment Add-On Manual**

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# 1. Introduction

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

As with all StaffSavvy tools, the recruitment add-on is designed to cope with large workforces and keep administration down 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. Simply enable the add on and click save.

You should immediately see the Recuitment menu item appear in the main menu.

## 1.2. Access Levels

There are several access levels associated with this add-on. They will be displayed under the Control Permissions page in their own section.

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 short list 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 un-blinded 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 changed so that it is 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 > Settings > Portal Settings.

#### 2.2.1. General Tab

These are the basic text that will be shown on the front of the site. Experiment with different text to see how this affects your homepage layout.

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 the text that will be included with various emails sent from the site. You can bespoke the language to suit your organisation.

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 your own colours used throughout the front of the site. Simply click each of the colours and choose the relevant colour you want to use.

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 upload a social media image to be used as the main image when sharing links. This allows a customised image to be uploaded which should be used on social media networks when sharing that link. Go to the Design tab and scroll down to the Social Media Images section.

You are also able to edit the portal's HTML footer. This allows you to add your own content to the portal directly.



All Roles

Login

# The future of your recruitment

Unlimited available positions, application forms, form questions, applicants and interview slots. Plus seamlessly transfer applicants with their details to full accounts.

## My Applications

Email Address

Applicant Code

Log In

## Available Roles

Contract

Closes 19/03/2025

### Policy and Research Assistant

We're looking for a Sussex graduate or a Sussex student on a gap year/seeking an industry placement to join our Campaigns and Representation Department.

View & Apply

Contract

Closes 19/03/2028

### IT Assistant

Come and have some fun! Be essential to running all Union activities, including; events, our shops and bars and our day-to-day running as I.T Assistant.

View & Apply

Contract

Closes 19/03/2025

### Digital Content Assistant

Come and help us communicate with students online and via social media.

View & Apply

# 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; this ensures a fair review for each applicant as their application is viewed alongside the exact questions asked when they completed their form.

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

## 3.2. Application Form Questions

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

### 3.2.1. Before your 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

To ensure we can identify an applicant, we require an email address to be the first field on any form. 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**  
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 one of.

- **Select One with Other**

Provide a list of options for the applicant to choose one of plus an “other” option at the end where the applicant can provide a single line of text answer.

- **Select Many**

Provide a list of options for the applicant to choose as many as are applicable.

- **File Upload**

Applicants can upload a file for review by the shortlisters.

- **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.

- **Date Data Field**

They can also contain Date Data Fields. This means you can request date field information within your application form. To use: Simply update your application forms and choose the date data field you wish to collect.

- **Special Field**

One of the standard StaffSavvy fields from the main site. These will be used to create the staff member’s StaffSavvy account if they are successful.

- First name
- Last name
- Nick name
- 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. It is useful to provide 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 into your current list of questions. It allows you to have standardised questions that you included 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 you allow. They can also use basic formatting on this text including bold, italic, underline 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

Both of these answer types allow you to enter as many options as you wish and to order them as needed.

Select One answers will force the applicant to only select one answer whereas the Select All That Apply answers will 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 through 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. 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 is effectively blinding the answer during shortlisting. Specifically it will hide the answer from anyone who is assigned as a shortlisted for that position until the applicant has been offered an interview. Then the answer will be visible for 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.

### Shortlisting Applicants

IT Assistant

Applicant 00001

Decision	NO DECISION YET
Current or most recent employment or volunteering experience – Organisation Name	Burger King
Title of Position Held	Chef
Period of Notice/Date Able to start	Now
Please summarise your current duties and <small> Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. </small>	

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. Recruitment managers can see the answer throughout the process unless they themselves are listed as shortlisters and then the shortlister rules apply.

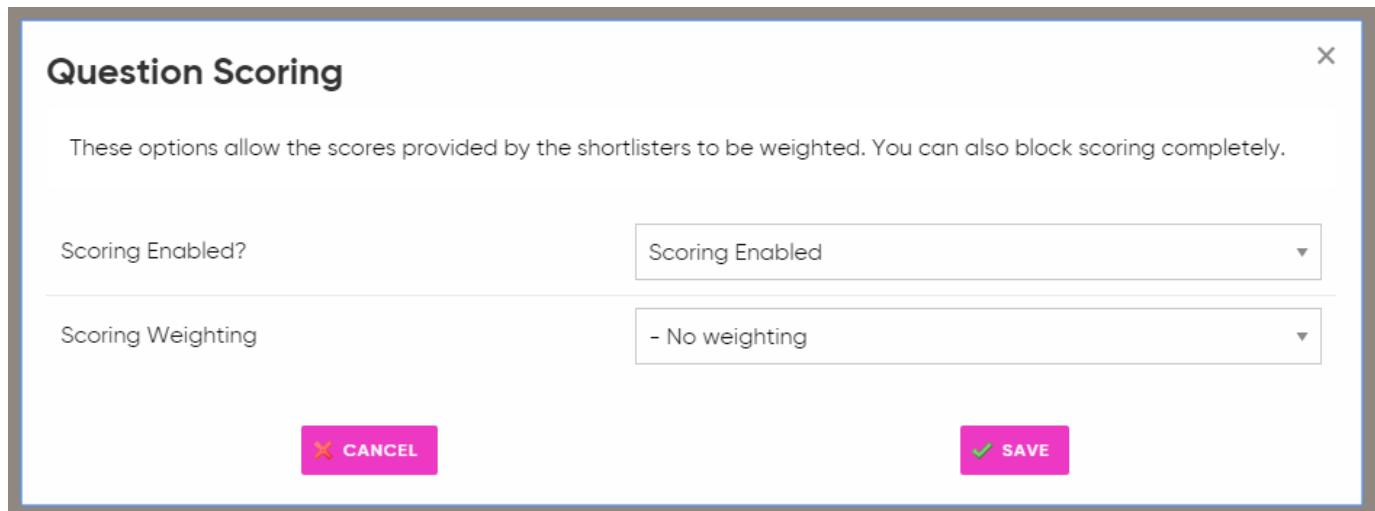
## 3.4. Scoring and Weighting

You can configure each question to either be 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 one the question field and choose Scoring Options.



The dialog box is titled "Question Scoring". It contains the following text: "These options allow the scores provided by the shortlisters to be weighted. You can also block scoring completely." Below this are two dropdown menus. The first dropdown, labeled "Scoring Enabled?", has the option "Scoring Enabled" selected. The second dropdown, labeled "Scoring Weighting", has the option "- No weighting" selected. At the bottom left is a pink "CANCEL" button with a white "X" icon. At the bottom right is a pink "SAVE" button with a white checkmark icon.

## 3.5. Sub Forms

Sub Forms is one of the more powerful features within the application forms. It allows you to have a standard set of questions that are always asked and include these easily on every application form.

Sub Forms are simply other application forms. They can be used on their own or included in other application forms. There are no limits to how many subforms can be included in an application form.

Please note: only one level of subforms can be included so you cannot include a sub-form that includes further sub-forms. 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 of the public information about the roles plus details on what should happen to successful applicants to that position.

**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 simply duplicate the position to create a new position and separate the previous applicants from the new.

Manage Positions						
Title	Status	Applicants	Shortlisting	Applications	Edit	Shortlisters
Assistant Manager Co-op	CLOSED ON 23/03/2018	ONE INCOMPLETE	Awaiting Shortlisting	APPLICATIONS		
Digital Content Assistant	LIVE	No applicants	Awaiting Shortlisting	APPLICATIONS		
Events Assistant	CLOSED ON 19/03/2018	No applicants	Awaiting Shortlisting	APPLICATIONS		
IT Assistant	LIVE	2 APPLICANTS	Awaiting Shortlisting	APPLICATIONS		
Policy and Research Assistant	LIVE	ONE APPLICANT	ONE SHORTLISTED 0 REJECTED	APPLICATIONS		

## 4.1. Basic Information

The basic information on a position includes details such as the number of available positions, opening and closing dates and a reference code if you wish to show that to applicants.

This page also allows you to set the shortlisting method that you will use to review and rank all of your applicants. See the [Shortlisting](#) section for more details.

You can edit this information at any time but be aware that applicants will not be informed of any changes.

## 4.2. 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. The page is formatted into two columns on larger screens, 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. Template Blocks

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

They allow you to write the content once and then reuse it in multiple places. Updating the template block will update the content for all of the places where 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. 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 plus any training programs that they should be assigned to from the start.

When an applicant is offered, and accepts the position, 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.

The staff member will then be emailed with a welcome link and temporary password which will launch them into your main StaffSavvy site.

They will then start your normal on-boarding steps and any requirements set on their required roles. No further authorisation is needed for the account.

## 4.5. 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 are able to reinstate the positions or duplicate them for further use.

# 5. Accepting Applications

## 5.1. Public Site

The public site is always accessible and will show visitors all available positions. This site also allows applicants to login to see their past applications and 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 any time.

Once an applicant has a code then they will be required to be logged in whenever they apply to a position. This is to ensure all of the 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 then the details have been 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 amend their application. 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.

### 5.4.1. Force Submit Application

Occasionally you may have an excellent candidate who has completed their application form but has not submitted the application for review. You are able to view draft applications if you are not listed as a shortlister on the position. They are shown as the first tab when viewing all applicants on a position.

You can view the answers submitted along with their portal login details.

On this Draft Applications page, you can also Force Submit their application. This will act like they have reviewed and confirmed their application for your role. This should only be completed with the applicant's expressed permission. They will receive email confirmation that their application has been received.

Please be aware that this bypasses all required answers so an application can be forcibly submitted without being completed.

### 5.4.2. Clear Draft Application

You also have another option which will clear their application details completely. This option will shred all data relating to their application and allow them to start from scratch. When they start a new application, they will be using the latest version of the application form. This option is useful if you need to make radical changes to your application form and want the applicants to start again.

## 6. Shortlisting

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

The tools here have been created to help minimise the administration and organisation required to successfully and fairly short list 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 and provide feedback and make decisions.

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

When adding a short lister 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. There are various options based on how you wish to shortlist the applications.

## 6.2.1. Simple/Draft

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

Only one draft decision is allowed per application but this can be changed as many times 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 too.

Once the whole application is scored, the shortlisted 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 a total of the averaged scores for the questions. This will be a larger number.

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## 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.

**Applicant Summary**

Just one successful offer needed.

! Applicant has accepted 1 other positions recently (Policy and Research Assistant)

## 6.4. Block Staff Applying for in-House Positions from Viewing Applications

Under Recruitment: you can now use the Shortlister Manager page to block a staff member who would normally have access to the recruitment area from seeing a position. This allows them to apply to a position but not have access to any of the notes, comments or progress of applicants in that position.

*To use: Manage the Short listers for the position and restrict access with the option 'Access Blocked (Overrides Admin Access)'.*

All Positions     Edit Position Details

### Shortlisting Team

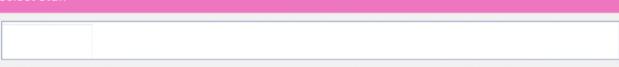
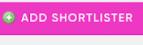
**IT Assistant**

These staff are permitted to view the applicant's blinded forms.

Staff Member	Access
Alex Huntley	-- Access Blocked (overrides admin access and prevents them viewing applicants) View Applications Only Can Score Applications Only Can Score Applications and Suggest Decisions ✓ Can Score, Suggest and is a final Decision Maker

Select Staff    Access

 Can Score, Suggest and is a final Decision Maker 

StaffSavvy™  
SmartBlue Ltd is providing this service on behalf of StaffSavvy Demo

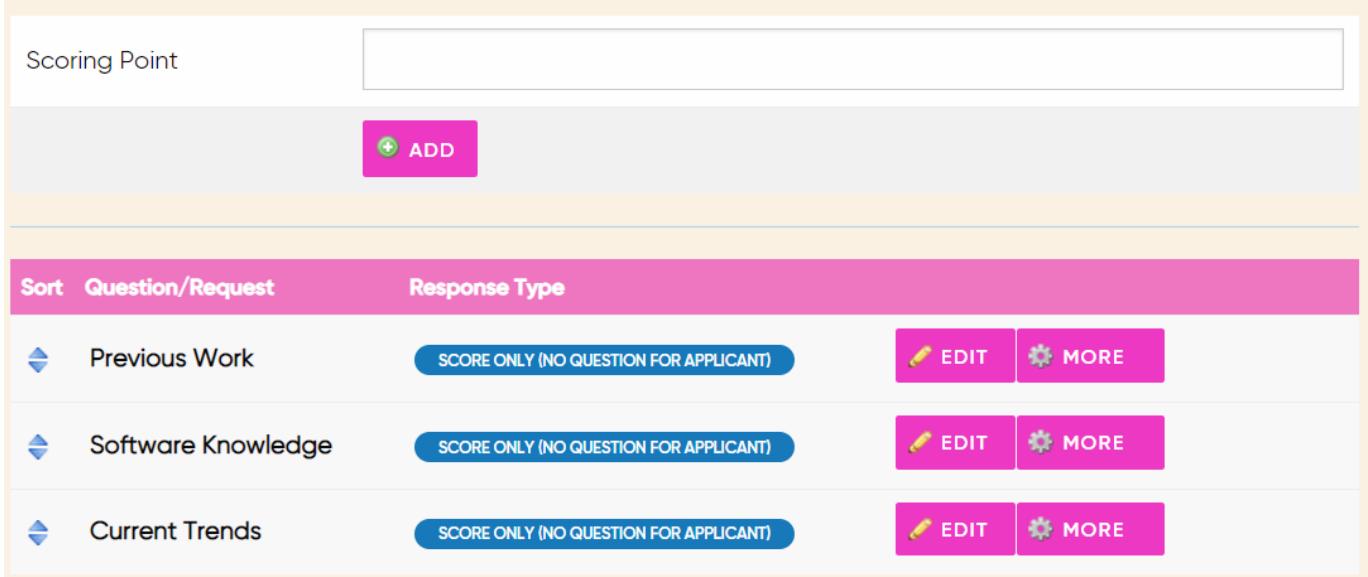
## 7. Interview and Scoring Forms

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

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

### Manage Scoring Form Questions

#### Editing Interview Scoring Form: Designer : Draft v1



The screenshot shows a user interface for managing scoring form questions. At the top, there is a text input field labeled "Scoring Point" with a placeholder "Scoring Point". Below it is a pink "ADD" button with a plus sign icon. The main area is a table with three columns: "Sort", "Question/Request", and "Response Type". The "Sort" column contains arrows indicating sorting. The "Question/Request" column lists three items: "Previous Work", "Software Knowledge", and "Current Trends". The "Response Type" column for each item shows a blue button with the text "SCORE ONLY (NO QUESTION FOR APPLICANT)". To the right of each row are "EDIT" and "MORE" buttons. The entire interface has a light orange background.

Sort	Question/Request	Response Type	
◆	Previous Work	SCORE ONLY (NO QUESTION FOR APPLICANT)	 EDIT  MORE
◆	Software Knowledge	SCORE ONLY (NO QUESTION FOR APPLICANT)	 EDIT  MORE
◆	Current Trends	SCORE ONLY (NO QUESTION FOR APPLICANT)	 EDIT  MORE

This removes the requirement of our application forms to have scoring schemes assigned before opening the position to applicants. It also means that 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 they are not seen by applicants, only the scorer, so the scorer can mark them on questions that they don't want the applicant to see and also to add interview questions that the scorer will need to mark them on.

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

## Edit Scoring Form

Scoring Form Version V1 DRAFT YOU WILL NEED TO PUBLISH THIS DRAFT BEFORE IT IS SHOWN TO APPLICANTS.

Scoring Form Title

 SAVE SCORING FORM

Click the 'Scoring Help' button under the cog icon  to leave information for recruitment shortlisters on how to score/if there is additional detail about what this question means.

By clicking 'more' 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.

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

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

Make sure you choose answers out of 5 or answers out of 10 to enable the scoring forms.

Shortlisting

Shortlisting Scoring Form	Draft Decision / Quick Decision Score Answers Out Of Five <input checked="" type="checkbox"/> Score Answers Out Of Ten
Shortlisting Method	
Total Score Calculations	Total of each question's average score (e.g. the total of up to 5 points for each question scored)

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

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

View:  All Applicants  Shortlisted Applicants  Rejected/Withdrawn Applicants  Under Offer/Accepted

Applicant	Decision
Frank Moody (00001)	INTERVIEW BOOKED: 04/12/2022 SESSION 1 AT 13:00PM
	 VIEW APPLICATION  INTERVIEW SCORING

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



Scoring Form

Scoring Point  
Did the applicant complete the applications in under 30 minutes?

Scoring Point  
Did the applicant Score highly on team building exercises

## 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.

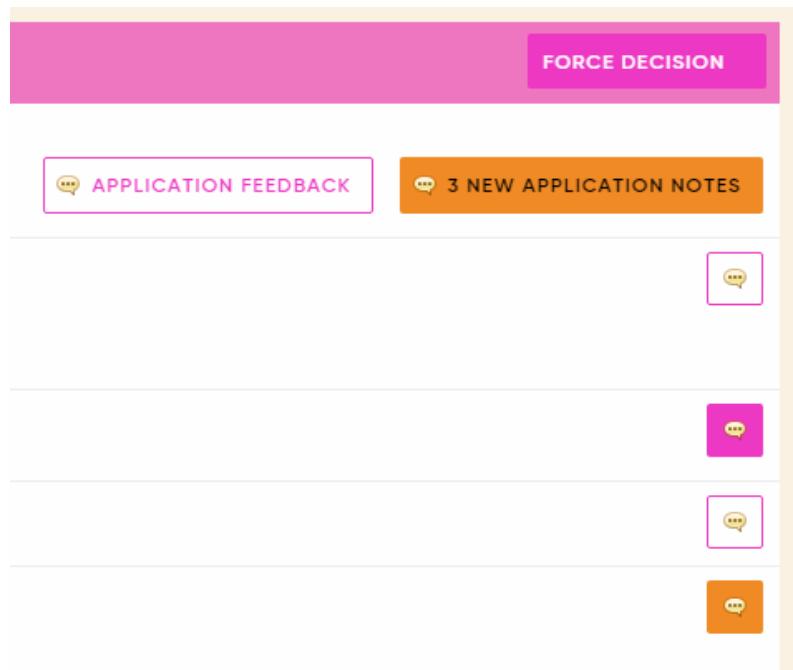
The system will track when you have seen each of the comments and will alert you to new comments with an orange icon next to each application. Once in the application, you will see where the comment has been hidden based on the orange button colour.

Once read, the comments buttons will turn blue.

If there are no comments then the button will be grey.

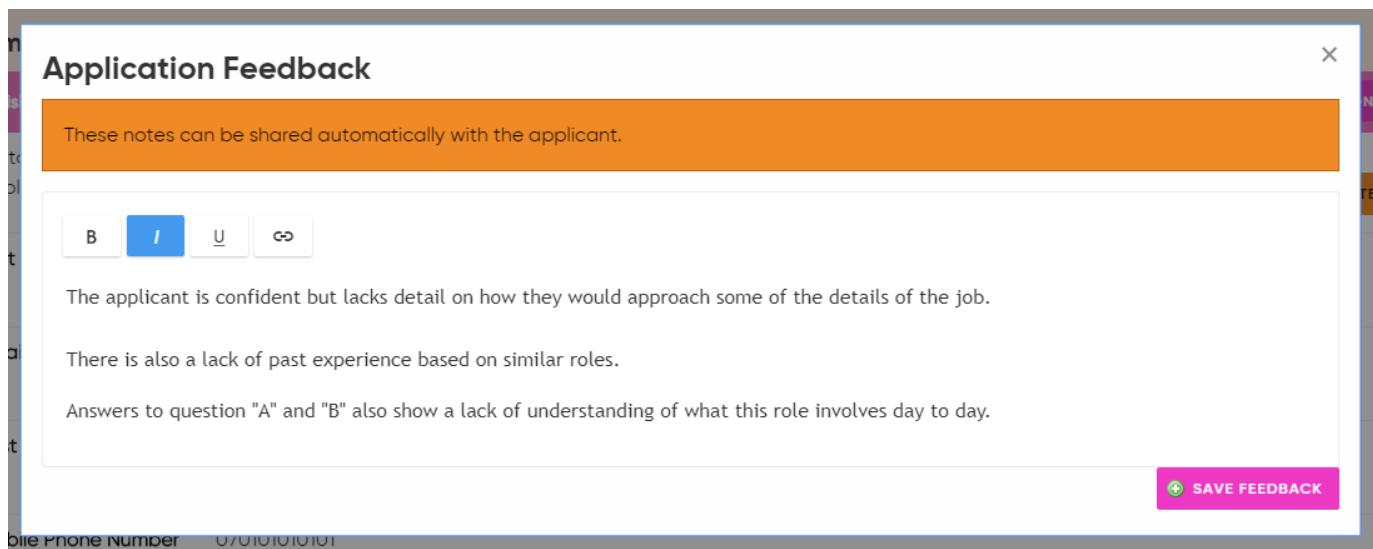
Comments are often used throughout the application process and can also be used to hold comments on their interview.

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



## 9. Application Feedback

This allows for shortlisters to add notes to an application as decisions are being made. The feedback notes can be added on 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 containing the notes currently on 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 automatically be emailed through 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 if there is no feedback then the email will show a blank space.

If feedback has been provided on that application then it will turn

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

#feedback#"

To

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

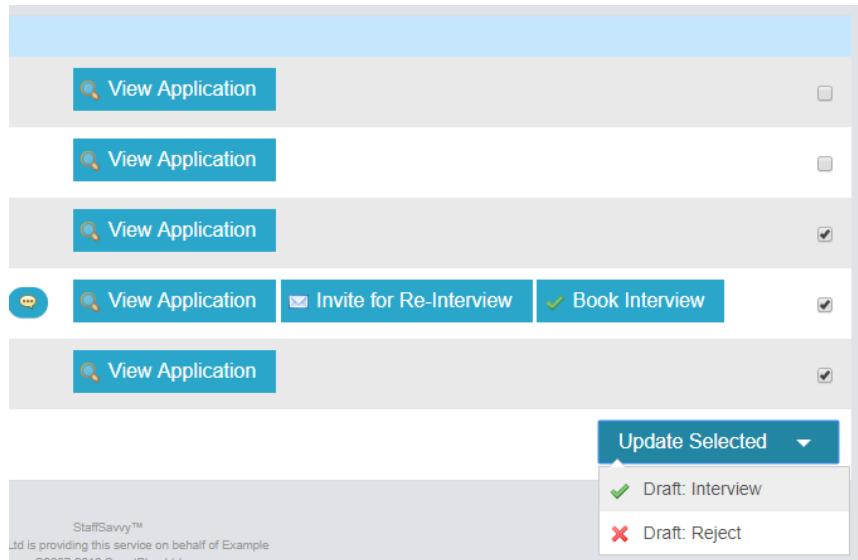
Feedback on your application:  
It could have been better (for example)"

# 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.

There are two ways to record a draft or final decision on an applicant. Either at the top of the application form or in bulk from the list of the 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 choose the new draft or final decision.



The only decision that cannot be completed in bulk is the Offer Employment step. This is currently only available within an application.

## 10.1. Reject Process

By default, any application who is rejected will automatically receive a rejected email with your messaging. You can set default messages for the whole recruitment portal under the portal settings. You can then also 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. 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.

There is a silent rejection option 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 required to restore applications that have been rejected. This might be due to an error made when 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 Un-Reject 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 email the applicant.

Please be aware that if the applicant logs into their recruitment portal account, it will show the application 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.

To transfer them, view their application and you will see the Transfer Application option in the Actions menu.

They currently will not be informed automatically about this change.

### Move Applicant To Another Position

This allows you to move the application to another position. The applicant number may change if their existing number is already in use.

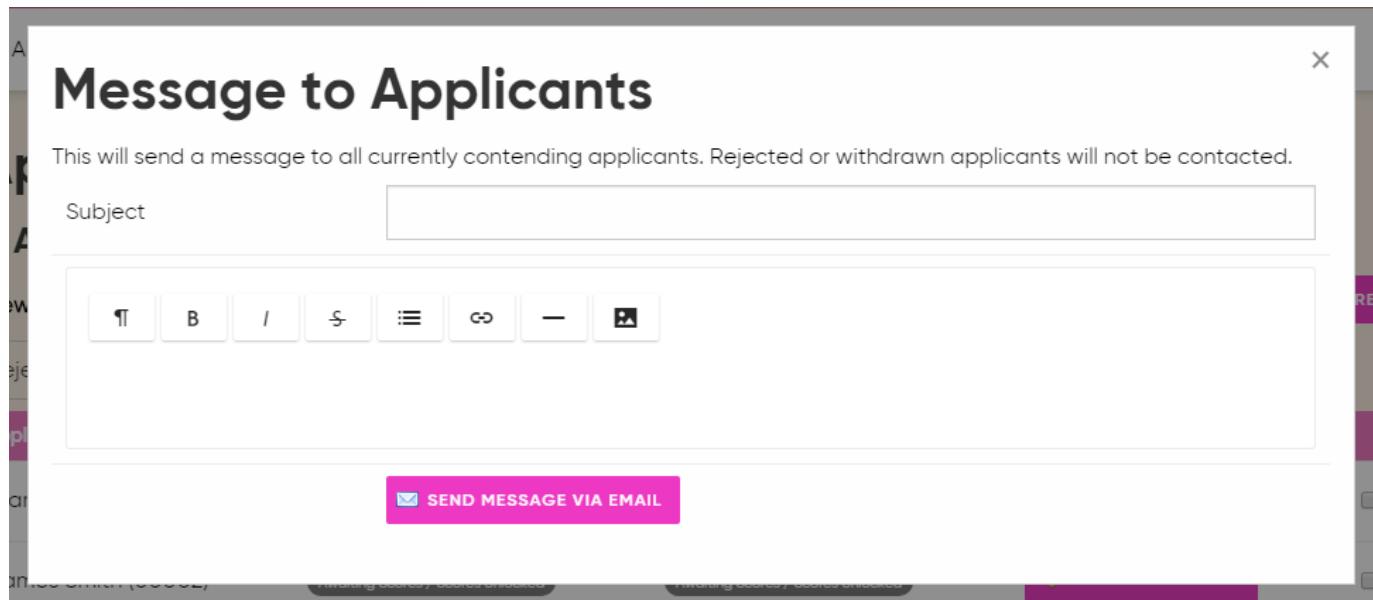
Move to

 CANCEL  TRANSFER APPLICATION

# 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.



# 12. Interviews

One of the more exciting parts of the recruitment process, we've tried to make it easy and simple to organise interviews for lots of potential employees at once.

## 12.1. Create Interview Slots

An interview slot is a fixed time and date that 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 to have in that session, how long each slot is and if you wish a gap between slots. You also set how many applicants will be interviewed in each slot.

**Interview Session**

Date	7th	Apr	2021
Start Time	11am	:	00
Number of back to back interview sessions	4 sessions		
Duration of session	30 mins		
Gap between sessions	10 minutes		
Interviewees per session	Single interview per session		
Location			
Notes	<span style="border: 1px solid #ccc; padding: 2px;">T</span> <span style="border: 1px solid #ccc; padding: 2px;">B</span> <span style="border: 1px solid #ccc; padding: 2px;">I</span> <span style="border: 1px solid #ccc; padding: 2px;">U</span> <span style="border: 1px solid #ccc; padding: 2px;">∞</span>		
<input style="background-color: #ff66cc; color: white; padding: 5px; width: 100px; margin-left: auto; margin-right: 0;" type="button" value="SAVE"/>			

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

For each slot you can enter the location of the interview and a long form notes. The notes will be displayed to the applicant once they have selected the interview slot.

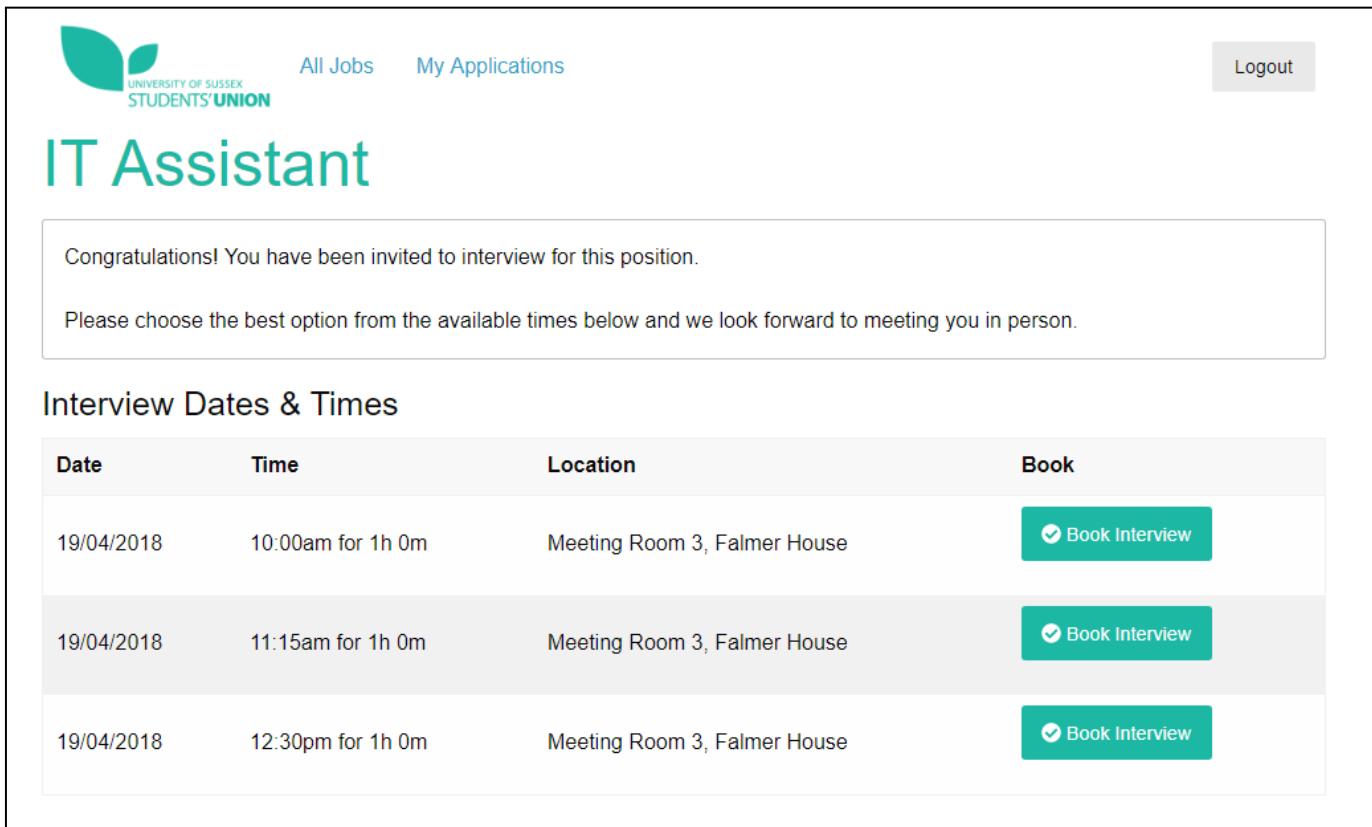
## 12.2. Invite to Interview

You can invite applicants to interview individually or in bulk. The bulk option will send invites 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.

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

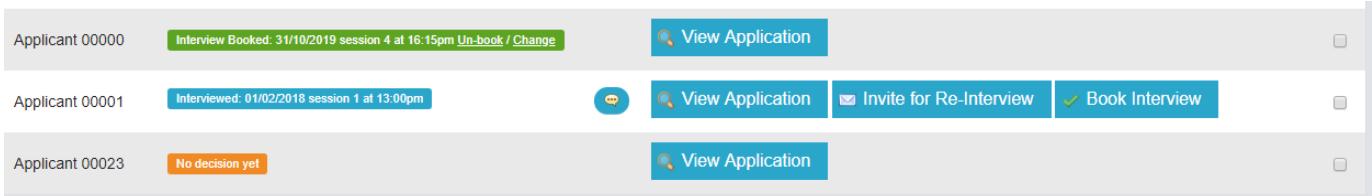


The screenshot shows a web-based application for managing interview bookings. At the top, there's a header with the University of Sussex Students' Union logo, navigation links for 'All Jobs' and 'My Applications', and a 'Logout' button. The main title 'IT Assistant' is displayed prominently. Below the title, a message congratulates the user on being invited to interview and asks them to choose a slot. A table lists three interview options with 'Book' buttons next to each. The table columns are 'Date', 'Time', 'Location', and 'Book'. The rows represent different interview times on April 19, 2018.

Date	Time	Location	Book
19/04/2018	10:00am for 1h 0m	Meeting Room 3, Falmer House	<input checked="" type="button"/> Book Interview
19/04/2018	11:15am for 1h 0m	Meeting Room 3, Falmer House	<input checked="" type="button"/> Book Interview
19/04/2018	12:30pm for 1h 0m	Meeting Room 3, Falmer House	<input checked="" type="button"/> Book Interview

### 12.2.1. 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 email. The example below shows a re-interview process too.



The screenshot shows a list of applicants on the shortlist dashboard. Each applicant row includes their name, a status message, and several action buttons. The first applicant has an interview booked for session 4 at 16:15pm. The second applicant has an interview booked for session 1 at 13:00pm. The third applicant has no decision yet.

Applicant 00000	Interview Booked: 31/10/2019 session 4 at 16:15pm <a href="#">Un-book / Change</a>	<a href="#">View Application</a>	<input type="checkbox"/>		
Applicant 00001	Interviewed: 01/02/2018 session 1 at 13:00pm	<a href="#">View Application</a>	<a href="#">Invite for Re-Interview</a>	<input checked="" type="checkbox"/> Book Interview	<input type="checkbox"/>
Applicant 00023	No decision yet	<a href="#">View Application</a>			<input type="checkbox"/>

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

# Applicants

## Policy and Research Assistant

View: Draft Applications All Applicants Shortlisted Applicants Rejected/Withdrawn Applicants Under Offer/Accepted

### Interview Sessions

#### Interview Sessions

04/12/2020 13:00pm	4 x 20 mins sessions with 1 applicants per session	NONE BOOKED, 4 SLOTS AVAILABLE	 DETAILS  EDIT  DELETE
07/12/2020 18:00pm	3 x 20 mins sessions with 1 applicants per session	NONE BOOKED, 3 SLOTS AVAILABLE	 DETAILS  EDIT  DELETE

 ADD INTERVIEW SESSION

### Shortlisted Applicants

Applicant	Decision	
Frank Moody (00001)	<a href="#">Invited to Interview</a> <a href="#">Manually Book</a>	 VIEW APPLICATION 

## 12.3. Reinterview

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

# 13. Job Offer

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

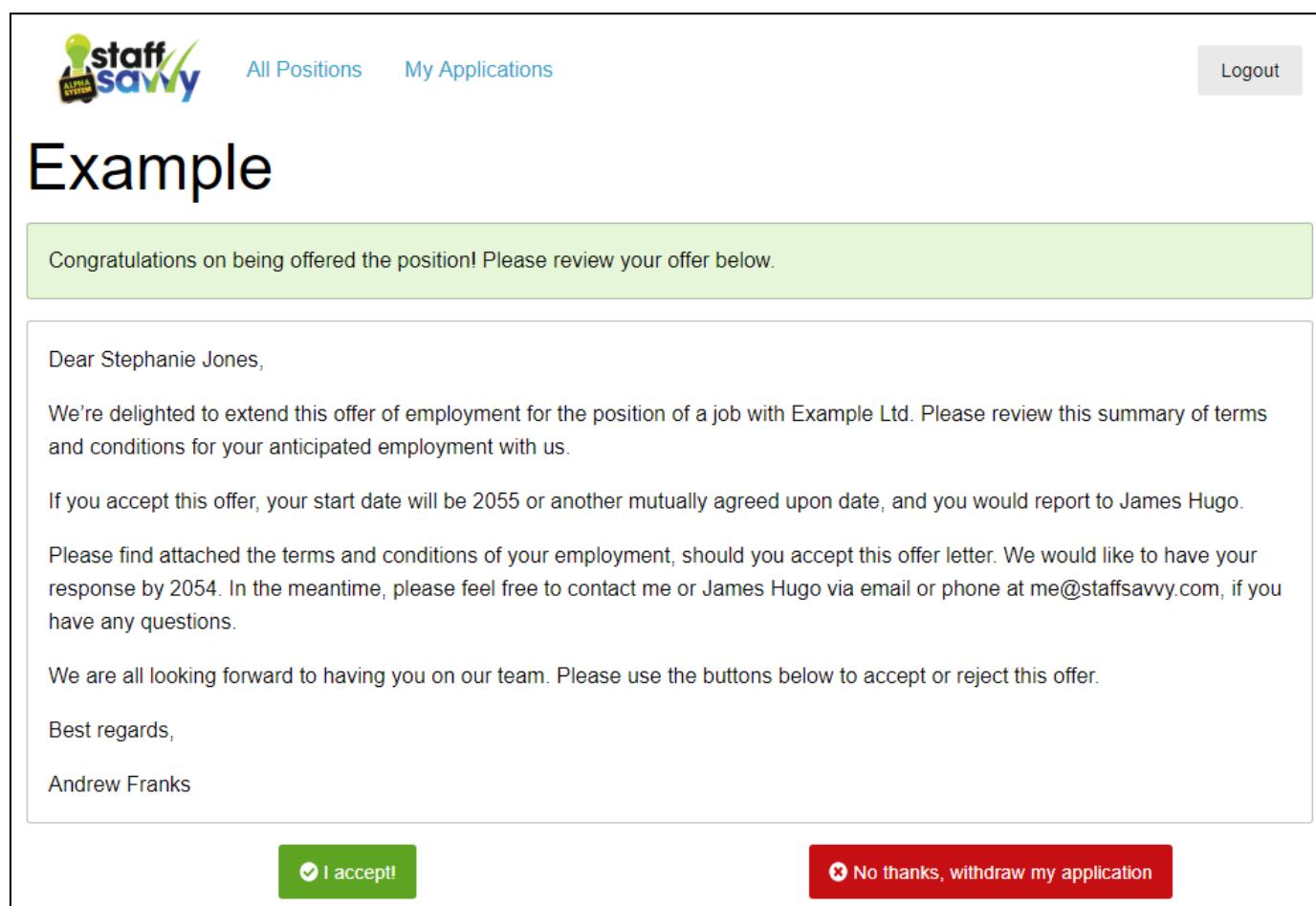
If you choose to offer the job to an applicant, they will be emailed the good news and will be requested to login to accept or reject the offer.

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

Once the applicant accepts then they will be created within the main StaffSavvy site and their induction/on boarding will begin.

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

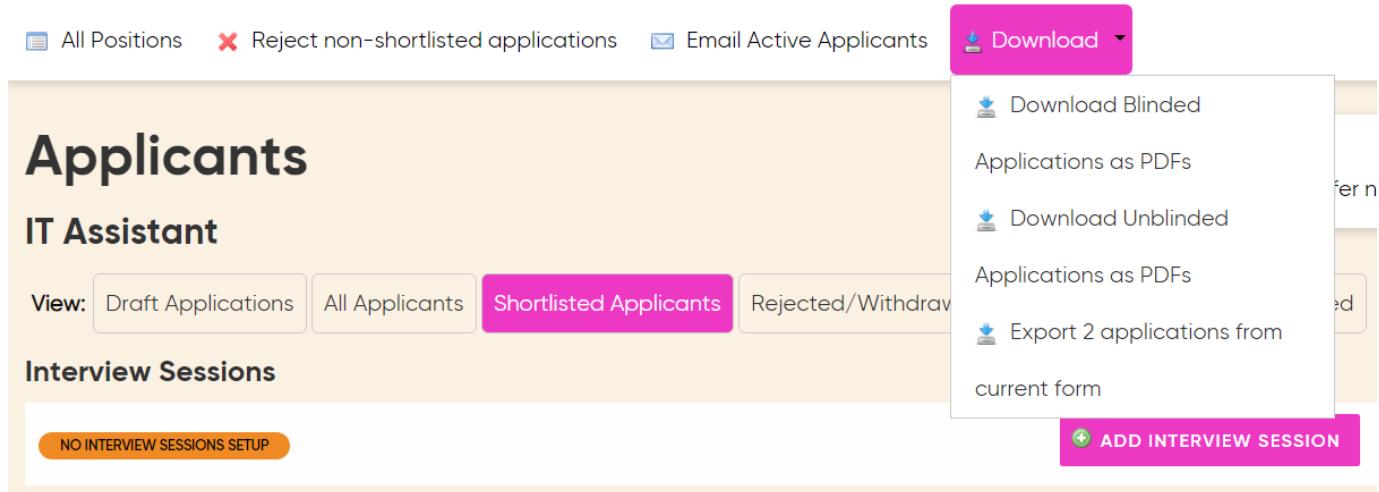
The applicant's decision will be displayed within your position shortlist.



The screenshot shows a simulated job offer email from StaffSavvy. At the top, there is a navigation bar with the StaffSavvy logo, 'All Positions', 'My Applications', and a 'Logout' button. The main content starts with a green header bar containing the message: 'Congratulations on being offered the position! Please review your offer below.' Below this, the body of the email begins with 'Dear Stephanie Jones,' followed by a paragraph about the offer of employment. It then asks the recipient to accept the offer, mentioning a start date of 2055 and reporting to James Hugo. It encourages the recipient to contact James Hugo for any questions. The email concludes with a note of thanks and the signature 'Andrew Franks'. At the bottom, there are two buttons: a green 'I accept!' button and a red 'No thanks, withdraw my application' button.

# 14. Exports and Downloads

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



The screenshot shows the 'Applicants' section for an 'IT Assistant' position. The 'View' filter is set to 'Shortlisted Applicants'. A pink 'Download' button is highlighted, and a dropdown menu is open, listing options: 'Download Blinded', 'Applications as PDFs', 'Download Unblinded', 'Applications as PDFs', and 'Export 2 applications from current form'. Other buttons visible include 'Draft Applications', 'All Applicants', 'Rejected/Withdrawn', 'NO INTERVIEW SESSIONS SETUP', and 'ADD INTERVIEW SESSION'.

## 14.1. 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.

## 14.2. Excel Export of Applications

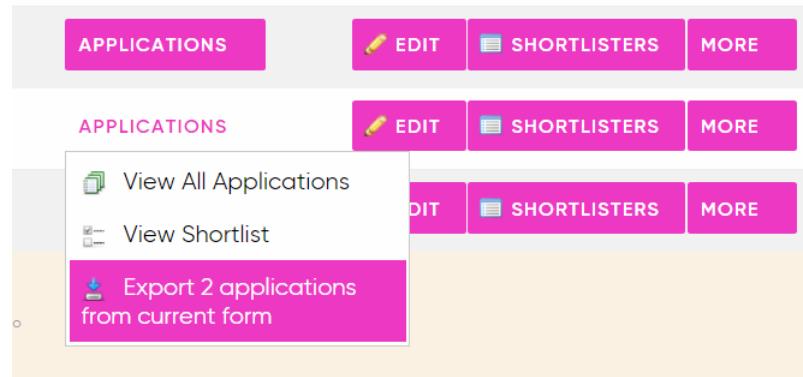
Under each position on the main position management page is the option to export the applications.

This will create an Excel formatted file with all of the applications and answers to all questions (blinded and hidden included).

It is designed to be used only for data analysis and not for any shortlisting purposes. Please ensure that any data you export is correctly protected and is only stored in line 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 interview requested 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.



If you have any feedback or require additional help then please contact us directly

[support@staffsavvy.com](mailto:support@staffsavvy.com)