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Forward Together.
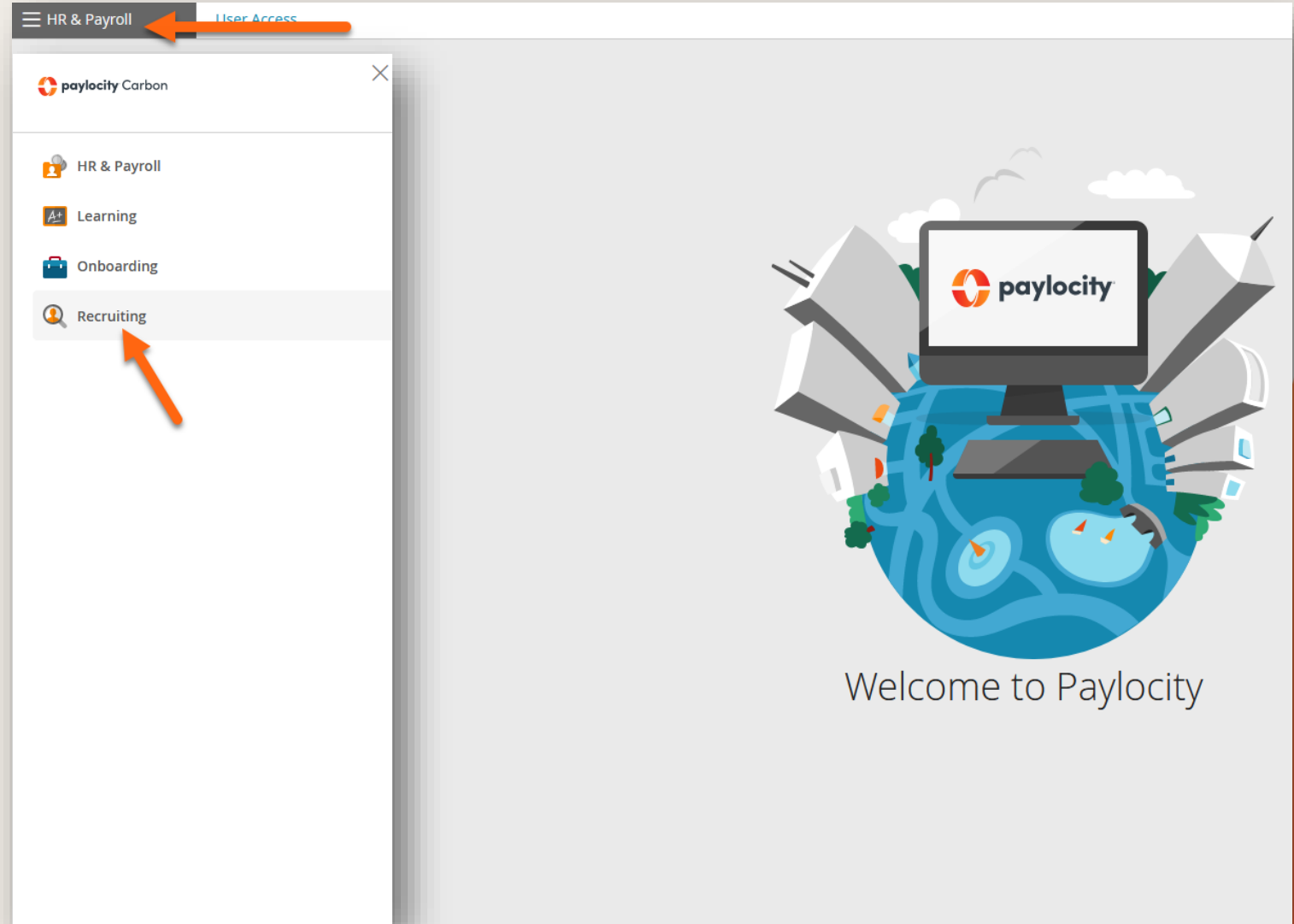
Recruiting Module User Guide

Navigating to Recruiting Module

Recruiting Module

- Click on App Switcher in the top left-hand corner of your screen to open the Apps Menu

- Click On Recruiting Link

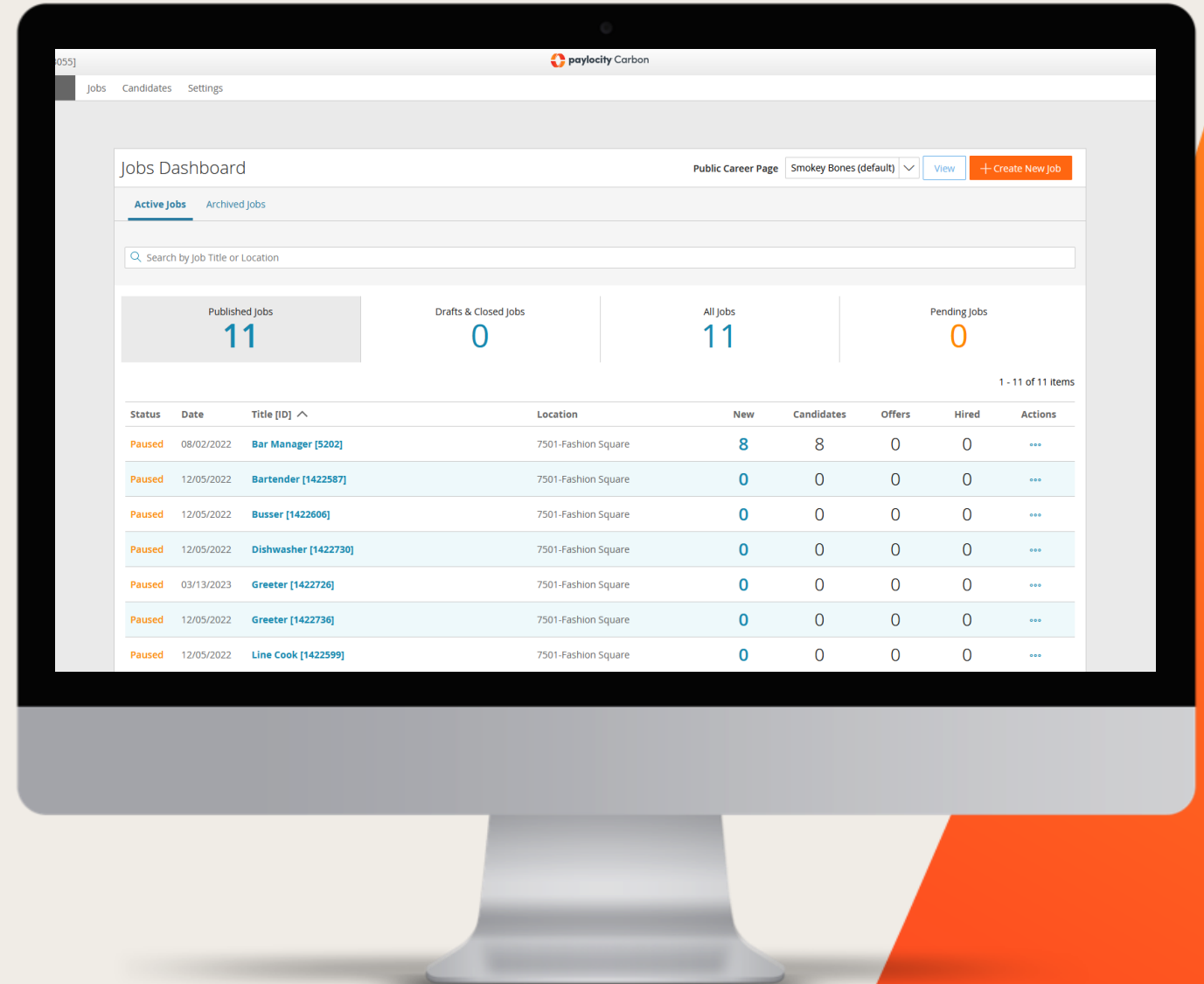- You will automatically be redirect you to the **Job Dashboard**

Navigating the Recruiting Module

Recruiting Module

Navigating the Jobs Dashboard

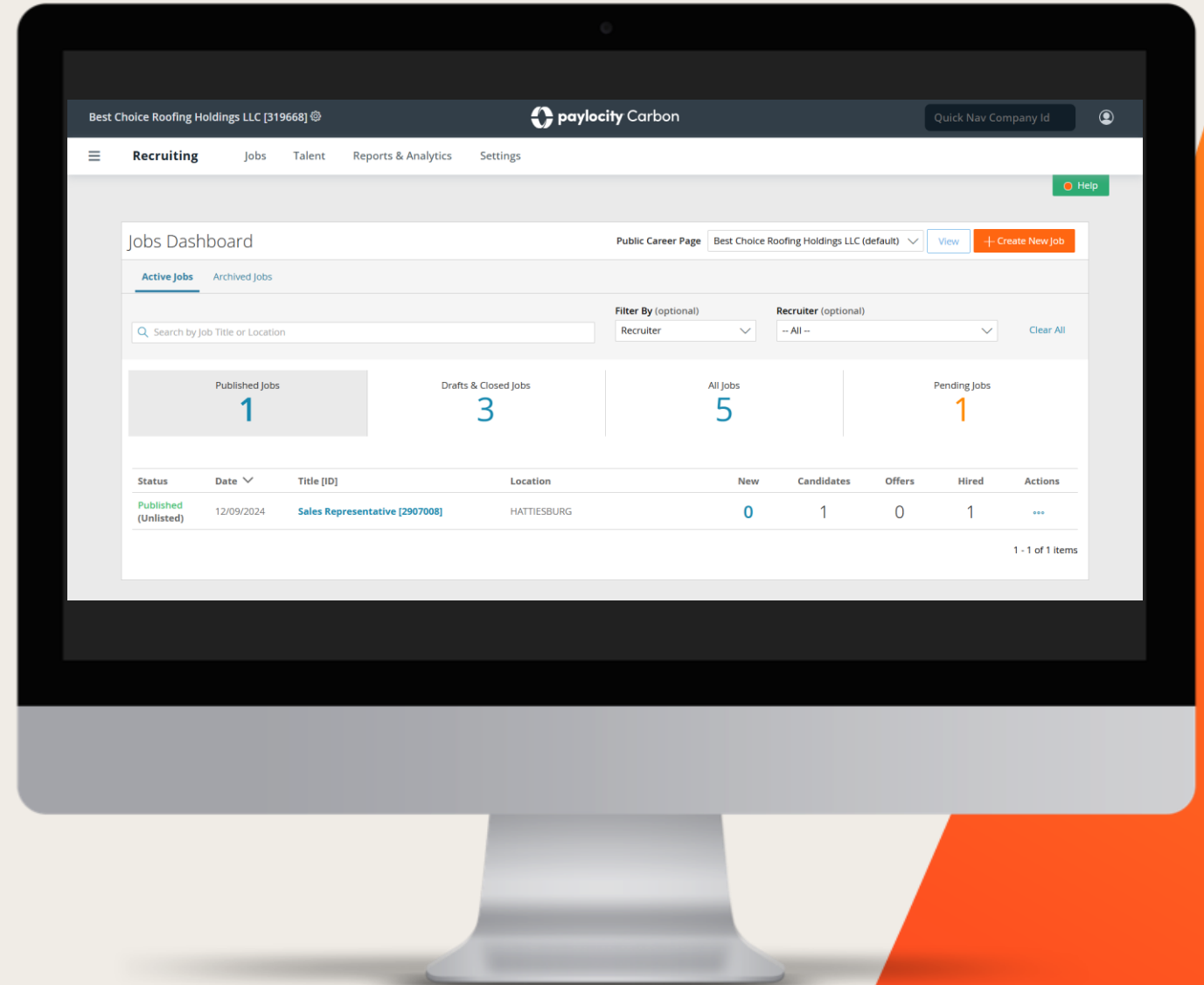- The Jobs Dashboard is your landing page as soon as you navigate into the Recruiting Module

Navigating the Recruiting Module

Recruiting Module

Navigating the Jobs Dashboard

- Click onto the Job Title hyperlink to drill into the details of the requisition.

- You will be able to:
  - view new and current candidate(s)
  - manage candidate(s)
  - schedule interviews with candidate(s)
  - reject candidate(s)
  - hire candidate(s)
  - send candidate(s) to Onboarding

Navigating the Recruiting Module

Recruiting Module

Navigating the Jobs Dashboard

- Click on the ellipses under the far-right Action column to open the Menu.

- You will be able to Pause or Un-Pause the job, refresh the posting date, and make edits to the job.

- Any edits to a job requisition will need to be approved by Corporate HR Department before the post goes live.

Create New Job

Recruiting Module

- Select **+Create New Job**

Create New Job

Recruiting Module

Job Information

- Use "**Position**" templates for automation of Description and Requirements

- Use "**Work Location**" templates for automation of Location

- Use the "**Internal Position Details**" so that when Employee is moved to Onboarding, the cost centers will follow them.

Create New Job

Recruiting Module

Job Information Continued

- **Job ID** is not necessary
  - *Default ID will be used if no other ID is provided*

- Enter in **Hiring Department** if you would like candidate to know
  - This is an optional field

- Add Job Type

- Add Salary – if applicable

- Add Job Slots – Number of openings
  - Add if applicable

Create New Job

Recruiting Module

Application & Screener Questions

- There is only one application for use

- Select the screener questions if necessary

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‹ Create New Job

33% Complete

✓ Job Information
Complete

✓ Hiring Process
Complete

● Application and Screener Questions
Incomplete

● Setup Approvals
Incomplete

● Job Preview and Status
Incomplete

● Advertise Job
Incomplete

Step 1: Select an Application (required)

Select Application (required)

CL2397 (Default)   ▾

CL2397

Accountant   Step 1 of 2

in f X ✉

Select Resume to Upload   ☑ Fill out application with my resume

Information

First Name (required)   Email Address (required)

Last Name (required)   Mobile Number
⤢ Open Preview in New Tab
For international numbers, start with a + and then

Step 2: Add Screener to Application (optional)

Select Screener

**Teacher Screener Questions   ▾   ✕ Remove Screener

Are you a fully initiated Catholic in the communion of the Catholic Church and intentionally living out the five precepts of the Church (CCC2041-2043)? (required)
○ Yes
○ No

Create New Job

Recruiting Module

Job Requisition Approvals

- Job Requisitions do not require approvals so click **Next: Job Preview and Status**

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Create New Job

Recruiting Module

Job Preview and Status

- Select the appropriate Job Visibility
  - External Careers Page
    - Will be published to public job boards, Company Website and Self-Service Portal
  - Internal Careers Page
    - Will only be post to the Employee Self Service Portal for existing employees
  - Unlisted
    - Will not be visible outside of the Recruiting platform. You must individually share this job to potential candidates if selecting this option

- **Publish Job**

---

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‹ Create New Job

66% Complete

✓ Job Information Complete

✓ Hiring Process Complete

✓ Application and Screener Questions Complete

✓ Setup Approvals Complete

▣ Job Preview and Status Incomplete

▣ Advertise Job Incomplete

Job Status

Post Job To
DOCMASTER (Default) ▾

Current Status
Draft

Job Visibility
● External Careers Page   ○ Internal Careers Page
○ Unlisted

Job will be posted on public career site visible to anyone. All published, public jobs are posted to Indeed.com, to opt-out visit Settings, Integration.

[Publish Job]   [Save as Draft]   [Discard Job]

Preview Job Posting

Accountant

CL2397

Accountant   [Apply]

Description
Job Description for Accountant:

We are seeking an experienced Accountant to join our team. The ideal candidate should possess strong analytical skills, attention to detail, and knowledge of current accounting principles and regulations. As an Accountant, you will play a key role in maintaining our financial records, ensuring compliance with tax laws, and providing financial analysis to support business decisions.
Responsibilities:
- Prepare financial statements and reports, including balance sheets, income statements, and cash flow statements. - Ensure accuracy and completeness of financial records, including reconciling

⧉ Open Preview in New Tab

Managing the Candidate

Recruiting Module

View Candidates Application, Resume, and other information

- Click onto the **Job Title** link to drill into the details of the requisition

- You will land on the **New Applications** stage

- Here you will be able to see all new applicants that have applied

Managing the Candidate

Recruiting Module

View Candidates Application, Resume, and other information

- Click onto employee's name

- Click onto the **Application** Link

- Here you will be able to see the Candidate's **Resume**, Application (Details), and answers to the Screener Questions

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Peyton Davis (He/Him/His)

Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com

Edit Tags

Actions ⌄

Sales Representative [5806521] ⓘ

Chicago • Published

Current Status: New Application

Reject   Change Status ⌄

⌄ 1 More Job

Most Recent Notes

Add Note

| Application | Activity Feed | Messaging | Interviews | Evaluations | Offer Letter |

📄 Resume   ☰ Details   ❓ Screener (100%)

⌃ Resume

Page 1 / 1   🔍 100% 🔍   ⬇ 🖨

Peyton Davis

123 South St. Manhattan, NY
805.555.0123
peyton@example.com
LinkedIn Profile
www.interestingsite.com

ABOUT ME

I am a highly motivated and results-driven sales professional seeking a challenging opportunity to leverage my skills and experience in a dynamic sales environment.

Managing the Candidate

Recruiting Module

View Candidates Application, Resume, and other information

- Click onto employee's name

- Click onto the **Application** Link

- Here you will be able to see the Candidate's Resume, Application (**Details**), and answers to the Screener Questions

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Edit Tags

Actions ⌄

Sales Representative [5806521] ⓘ

Chicago • Published

Current Status: New Application

Reject   Change Status ⌄

⌄ 1 More Job

Most Recent Notes

Add Note

| Application | Activity Feed | Messaging | Interviews | Evaluations | Offer Letter |

📄 Resume   ☰ Details   ❓ Screener (100%)

⌃ Application Details

First Name: Peyton
Last Name: Davis
Do you give us permission to text you?: Yes
Has Applied Before?: No
Source: Paylocity
Available to Start: 01/06/2025
How did you hear about us?: Company Website
Skills: Problem solving, Flexibility, Communication, Organization, Critical thinking, Collaboration
Has Worked Here Before?: No
Work Authorization: Yes

⌃ Work History

Account manager

VanArsdel, Ltd.

January 2019 - Present

Currently Working Here? Yes

Managed and grew key accounts by developing strong relationships, identifying opportunities, and implementing effective sales strategies

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Managing the Candidate

Recruiting Module

View Candidates Application, Resume, and other information

- Click onto employee's name

- Click onto the **Application** Link

- Here you will be able to see the Candidate's Resume, Application (Details), and answers to the **Screener Questions**

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David Miller
7890 Oak Avenue, Washington, DC, 20002
M: (202) 555-4321 • david.miller@email.com
Edit Tags

Actions ⌄

TEACHER [5931863] ⓘ
Saint Holy Parish and School • Published
Applied 02/10/2025

Current Status: New Application
Reject   Change Status ⌄

Application | Activity Feed | Messaging | Interviews | Evaluations | Offer Letter

📄 Resume   ☰ Details   ❓ Screener

**Teacher Screener Questions

Show all Screener Options ⬤

Are you a fully initiated Catholic in the communion of the Catholic Church and intentionally living out the five precepts of the Church (CCC2041-2043)?

🔵 No

⌃ No Additional Jobs
📋 Move or Add to Job

Most Recent Notes   View All
Add Note

Managing the Candidate

Recruiting Module

View Candidate's Activity

- Activity Feed will display any movement, communications, notes, etc. that has occurred on this candidate's profile for you to review

Managing the Candidate

Recruiting Module

Communicate with the Candidate

- Messaging will all you to communicate with the candidate via email and text message*
    - *Candidate must opt into text messaging during the application process in order to text them

Managing the Candidates

Recruiting Module

Schedule Interviews

- Here in Interviews, you will be able set up interviews with candidates

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Edit Tags

Actions ▾

Sales Representative [5806521] ⓘ

Chicago • Published

Current Status: New Application

Reject   Change Status ▾

Application   Activity Feed   Messaging   **Interviews**   Evaluations   Offer Letter

Create an interview, or let your candidate select a time slot based on your teams' availability.

Create Interview

▾ 1 More Job

Most Recent Notes

Add Note

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Managing the Candidates

Recruiting Module

Offer Letters

- Here in Offer Letter, you will be able set up and send an offer letter to a candidate. This is optional if you would like to start using this feature within Paylocity.

TEACHER [5931863] ℹ

Saint Holy Parish and School · Published

Applied 02/10/2025

Current Status: New Application

Reject   Change Status ⌄

Application   Activity Feed   Messaging   Interviews   Evaluations   **Offer Letter**

Managing the Candidate

Ready to hire this candidate? Generate and send an Offer Letter.

Create Offer Letter

⌃ No Additional Jobs

💼 Move or Add to Job

Most Recent Notes   View All

Add Note

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Managing the Candidate

Recruiting Module

Be sure to add notes as regularly as possible to keep everyone updated on the candidate's status.

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Edit Tags

Actions ∨

Sales Representative [5806521] ⓘ

Chicago • Published

Current Status: New Application

Reject   Change Status ∨

Application   Activity Feed   Messaging   **Interviews**   Evaluations   Offer Letter

Create an interview, or let your candidate select a time slot based on your teams' availability.

Create Interview

∨   1 More Job

Most Recent Notes

Add Note

Managing the Candidate

Recruiting Module

As you are reviewing candidates, you will move them through the different statuses in your workflow. Use the <u>Change Status</u> option to select a new status for this candidate as they progress through the stages

Managing the Candidate

Recruiting Module

Should you come across an individual that you feel is not a good fit, please use the Reject button

Schedule Interview with Candidate

Recruiting Module

Connect your Calendar

- Navigate to **Settings**

- Click **Interview Scheduling**

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Recruiting   Jobs   Talent Search   Settings **1**

Help

Settings

Templates ^
   Message Templates
   Workflows
   Screener Questions

My Settings ^
   Notifications
   Interview Scheduling **2**

Interview Scheduling

Time Zone

Set your preferred default time zone when scheduling interviews.

Interview Scheduling Default Time Zone
My Current Time Zone
Current time zone as recognized by your location

Edit Default Time Zone

Add favorite time zones to quickly access them at the top of the interview scheduling time zone dropdown.

Add Favorite Time Zone

Calendar Connection

Connect your Outlook, Exchange, Google, Office 365, or iCloud calendar so team members can view your availability when scheduling meetings in Recruiting.

Schedule Interview with Candidate

Recruiting

Connect your Calendar

- Scroll down to **Calendar Connections** and open the drop down menu to select your calendar provider

- Click **Connect Calendar**

- A new tab will open in browser

- Follow guided prompts to complete the connection

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Schedule Interview

Recruiting Module

Setup Interview Round

- When on the candidate record in Recruiting, Navigate to the **Interviews** tab
- Click **Create Interview** button

Schedule Interview

Recruiting Moduel

Setup Interview Round

- **Click Add Meeting**

Schedule Interview

Recruiting Module

Setup Interview Round

- Click **Continue**

Schedule Interview

Recruiting Module

Setup Interview Round

- Click **Create Hiring Team Invitation** button

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Job Details	Candidate	Recruiter(s)	Hiring Manager(s)	Team Member(s)
Sales Representative [5806521] , Chicago - IL	Peyton Davis	—	DAVID ROSE	—

Invitation to Hiring Team

Create Hiring Team Invitation

Invitation to Candidate

Email Notification

Create Candidate Invitation

SMS Invitation

Create SMS Invitation

Reminder emails and text messages will be sent to the candidate 24 hours before and 1 hour before the scheduled interview.
* Text message will only be sent if candidate opts-in when scheduling.

View Reminder

Previous: Schedule Interviews   Create Interview Round

Schedule Interview

Recruiting Module

Setup Interview Round

- Subject Line and Email Message pre populate for you

- Add any additional notes or reminders for yourself into message

- Click **Create Invitation**

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Select Email Template

-None-

Email Subject

Insert placeholder

Interview with {Candidate Preferred First Name} {Candidate Last Name} for {Job Title}

Email body

B *I* U | 🔗 | Insert placeholder

You are scheduled to interview {Candidate Preferred First Name} {Candidate Last Name} for {Job Title} role. {Interview Schedule}

☐ Make Event Private

⚪ Attach Candidate's Resume

Add Additional Attachments

Select File(s)

Limit of 10 files, 10MB per file and 20MB total can be attached to this email

Cancel   **Create Invitation**

Schedule Interview

Recruiting Module

Setup Interview Round

- Click **Create Candidate Invitation** button

Invitation to Hiring Team

Recipients   Delete   Edit

DR   View Info

Interview with Peyton Davis for Sales Representative

You are scheduled to interview Peyton Davis for Sales Representative role.
Schedule:
1/2/2025
8:00 AM - 9:00 AM (EST America/New_York) with DAVID ROSE at (407) 572-1060

Invitation to Candidate

Email Notification

Create Candidate Invitation

SMS Invitation

Create SMS Invitation

Reminder emails and text messages will be sent to the candidate 24 hours before and 1 hour before the scheduled interview.
* Text message will only be sent if candidate opts-in when scheduling.

View Reminder

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Schedule Interview

Recruiting Module

Setup Interview Round

- Email with Calendar Invitation (.ics) will be preselected automatically for you

- Choose whether or not candidate may reply back to your work email or just message center

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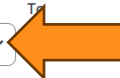**Invitation to Candidate**

Email Notification

Candidate Invitation Options:

☷ **Email with Calendar Invitation (.ics)** ✓
Removes CC, BCC functionality and creates calendar invitation.

with Email Only
ends email to candidate.

Reply To

Work Email ⌄

Invite Optional Interview Attendees ⓘ

Select an Employee ⌄

☐ Send email notification to inform teammates without inviting them ⓘ

Select Email Template

-None- ⌄

Email Subject

Insert placeholder ⌄

You're scheduled for an interview with {Company Name}

Email Body

Schedule Interview

Recruiting Module

Setup Interview Round

- Subject Line and Email Message pre populate for you

- Add any additional notes or reminders for candidate into message

- Click **Create Invitation**

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Select Email Template

-None-

Email Subject

Insert placeholder

You're scheduled for an interview with {Company Name}

Email Body

B *I* <u>U</u> ☰ ☰ 🔗   Insert placeholder

Hi {Candidate Preferred First Name} , You're scheduled to interview with {Company Name} :
{Interview Schedule}
Sincerely, {User Name}

☐ Make Event Private

Add Additional Attachments

Select File(s)

Limit of 10 files, 10MB per file and 20MB total can be attached to this email

Cancel   Create Invitation

SMS Invitation

Schedule Interview

Recruiting Module

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Forward Together.

Setup Interview Round

- Once both invitations have been created, click **Create and Send Invitation**

- This will send a calendar reminder and invite to both you, the Hiring Manager and the Candidate

---

Invitation to Candidate

Email Notification

Recipient
dvache@paylocity.com

Delete   Edit

You're scheduled for an interview with TRAINIC60

Hi Peyton, You're scheduled to interview with TRAINIC60:
Schedule:
1/2/2025
8:00 AM - 9:00 AM (EST America/New_York) with DAVID ROSE at (407) 572-1060

Sincerely, DAVID ROSE

SMS Invitation

Create SMS Invitation

Reminder emails and text messages will be sent to the candidate 24 hours before and 1 hour before the scheduled interview.
* Text message will only be sent if candidate opts-in when scheduling.

View Reminder

Previous: Schedule Interviews   Create and Send Invitations

Schedule Interview

Recruiting Module

Setup Interview Round

- Repeat steps as many times as necessary for additional interview rounds

Extending an Offer

Recruiting Module

Peyton Davis (He/Him/His)

Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com

Edit Tags

Actions ⌄

Sales Representative [5806521] ⓘ

Chicago • Published

Current Status: New Application

Reject   Change Status ⌄

Application   Activity Feed   Messaging   Interviews   Evaluations   **Offer Letter**

Ready to hire this candidate? Generate
and send an Offer Letter.

Create Offer Letter

⌄ 1 More Job

Most Recent Notes

Add Note

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Extending an Offer

Recruiting Module

- Choose the Offer Letter Template

- Please review auto-populated fields.

- Fill out required fields which may include **Start Date**, **Hiring Manager**, and **Compensation**.

- Click **"Next: Compose Offer Letter"**.

**Please type into the data fields. These are not dropdown menus.

‹ Send Offer Letter

0% Complete

- Select Offer Letter Template
  In Progress
- Compose Offer Letter
  Incomplete
- Compose Email
  Incomplete
- Setup Approvals
  Incomplete
- Preview & Send
  Incomplete

Select Offer Letter Template

Select Offer Letter Template to Begin (required)

Default Offer Letter Template   ⌃   Preview Offer Letter Template

Custom Placeholders

Enter offer information to prepopulate the Offer Letter

Company Name (required)   **Job Title** (required)

AoD Training   TEACHER

Candidate Full Name (required)   **User Name** (required)

David Miller   Emily Alba

Compensation (required)   **Exemption Status** (required)

Compensation   Exemption Status

Start Date (required)

Start Date

☑ Sync with Onboarding

Next: Compose Offer Letter

Extending an Offer

Recruiting Module

- Please type in Entity Address in the top right-hand box.

- Please read through the body of the Offer Letter to ensure the data points entered from the previous page populate appropriately.

- Click "**Next: Compose Email**".

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‹ Send Offer Letter

20% Complete

✓ Select Offer Letter Template
Complete

👍 Compose Offer Letter
In Progress

✉ Compose Email
Incomplete

📋 Setup Approvals
Incomplete

👁 Preview & Send
Incomplete

Offer Letter Header

This header will append across the top of all offer letter pages and can be used for company logo and address.

Your Career Page Logo   **Company Address**

☐ Include in Offer Letter Header

Offer Letter

Letter Body (required)

B I U ✎   ☰ ☰   Extending an Offer

Dear David Miller,

We are pleased to offer you the position of TEACHER. Your skills and experience will be an ideal fit for AoD Training.

As we discussed, your starting date will be 04/01/2025. The starting salary is 1000 and this is a exempt role.

If you choose to accept this job offer, please sign a copy of this letter and return it to me at your earliest convenience.

When your acknowledgment is received, we will send you additional benefit and documentation items. We look forward to welcoming you to the AoD Training team.

Previous: Select Offer Letter Template   Next: Compose Email

Extending an Offer

Recruiting Module

- Confirm candidate's email address is correct.

- Select the desired **"Reply To"** in the event that the candidate sends a reply email.

- Enter any additional contacts in the CC or BCC areas. This will allow them to see the Offer Letter.

- Compose Email to candidate.

- Click **"Next: Setup Approvals"**.

Extending an Offer

Recruiting Module

- Approvals will be disabled/not required

- Click "**Next: Preview & Send**".

Extending an Offer

Recruiting Module

- Preview page will contain a preview of your email and the attached Offer Letter.

- Please review all sections for accuracy.

- "Send Offer Letter".

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Send Offer Letter

80% Complete

✓ Select Offer Letter Template
Complete

✓ Compose Offer Letter
Complete

✓ Compose Email
Complete

✓ Setup Approvals
Complete

👁 Preview & Send
In Progress

Preview Email

DAVID ROSE (Messaging Tab) to **Peyton Davis** (dvache@paylocity.com)   December 26, 2024, 1:57 pm

TEST

Preview Offer Letter

View Offer Letter

Send Offer Letter

Previous: Setup Approvals

Extending an Offer

Recruiting Module

- Once Offer Letter has been sent the Candidate's Status automatically changes to **Offer Extended** and you will see a **Pending Signature** flag.

Edit and Resend an Offer

Recruiting Module

- If you ever need to edit an already launched Offer Letter, click the white "**Edit and Resend**" button.

- You will be asked to confirm your selection.

- You will be brought back to the beginning of the Send Offer Letter process.

Rescind an Offer

Recruiting Module

- If you ever need to rescind an offer letter, click the white "**Rescind**" button.

- You will be asked to enter in a reason.

- Click the orange "**Rescind**" button.

Send to Onboarding

Recruiting Module

When you are ready to hire your candidate and send their profile to the Onboarding Module, please use the status of "Hired".

A **Ready to Onboard?** Banner will populate

- Click **Select Onboarding Event** if ready to launch the onboarding event now
- Click **Send to Onboarding** if you will be launching the event at a later time

Send to Onboarding

Recruiting Module

Select Onboarding Event

- For new hires, the New Hire box will be checked.

- For rehires, the Rehire box will be checked

- Click **Next**

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Send to Onboarding

Recruiting Module

Select Onboarding Event

- Select the Onboarding Event Packet.

- Enter Employee's Expected Start Date.

- Verify the employee's information.

- Click **Launch** to send Candidates information from Recruiting to Onboarding.

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