RECRUITING & HR

BUSINESS MODEL SOFTWARE TRAINING

HealthTrust
SOFTWARE

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BUSINESS MODEL SOFTWARE

Recruiting & HR: Recommended Training Course Agenda

Course Purpose: We recommend using the following training outline to ensure that training participants receive clear instructions on how to efficiently manage the recruiting and HR functions in the software. The sequence of courses can be changed based on training needs; however the content of each course should remain as stated.

Recommended Course Attendees: Owners, Upper Management, HR, Clinical Staff

Estimated Duration: 1 hour 30 minutes

TOPIC	DESCRIPTION	
Adding a New Applicant	How to add new applicant and grant access to applicant portal	5 Minutes
Create a New Job	How to create a new job title in the system	5 Minutes
Creating a Recruiting Campaign	How to create a recruiting campaign for a specific position	10 Minutes
Adding a Job Board to Your Website	How to add a job board to your website using the system	5 Minutes
Receiving Applicants by Resume Upload	How to review resumes received via upload to website/system	5 Minutes
Receiving Applicants by Resume Email	How to review resumes received via email to website/system	5 Minutes
Receiving Applicants by Web Form	How to review applicants received via web form to website	5 Minutes
Receiving Applicants by Full Application	How to review applicants via full application to website/system	10 Minutes
Create a Lead Manually	How to create a lead manually	5 Minutes
Screening Leads	How to use the system to screen the most promising leads	5 Minutes
Converting Leads to Applicants	How to grant applicant portal access to leads	5 Minutes
Applicant Portal	How to use the system's applicant portal	5 Minutes
Hiring an Applicant	How to hire an applicant in the system	10 Minutes
Entering Payrates	How to enter payrates for employees	10 Minutes
Tracking Employee Docs	How to track employee HR documents	10 Minutes

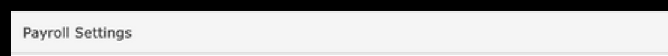
Create a New Job

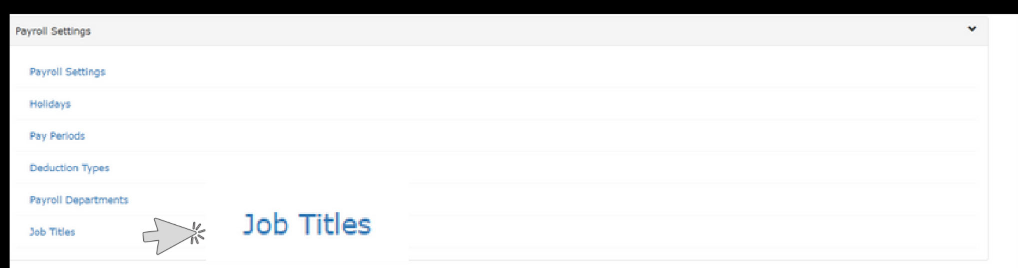
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.

2 Select Payroll Settings

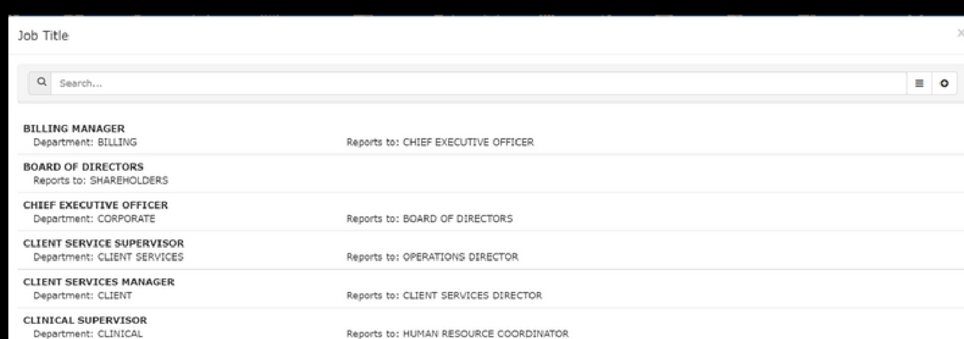
- Click on "Payroll Settings" and a drop down menu will open.
- Click on "Job Titles".





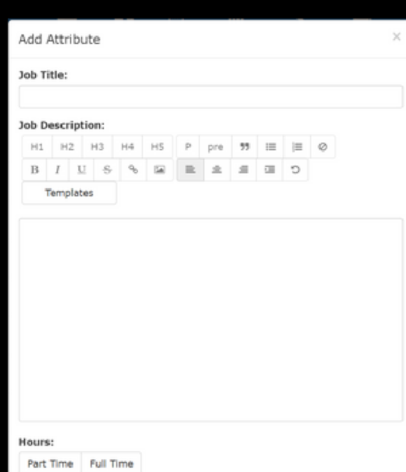
3 Add a New Job Title

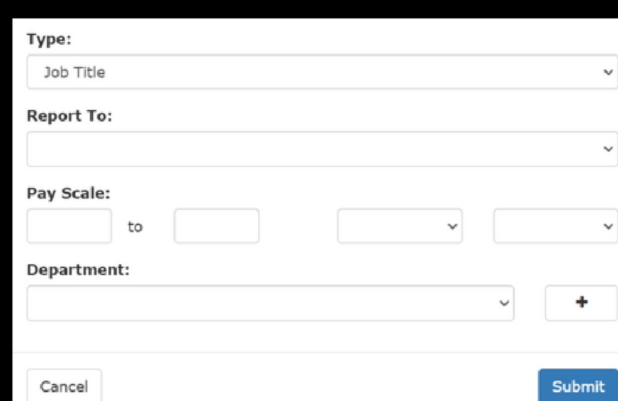
- Click the '+' icon on the far right to the search bar.
- A form page will open up.



4 Complete the Form

- Fill out the required fields.
- Don't forget to click 'Submit' on the bottom right of the form.

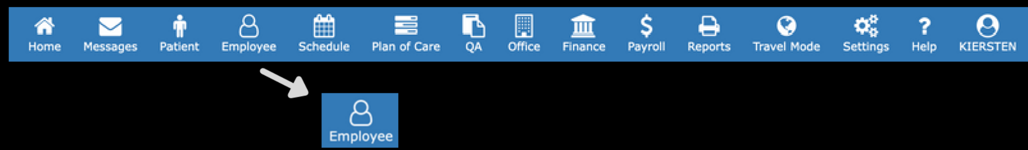




Adding a New Applicant

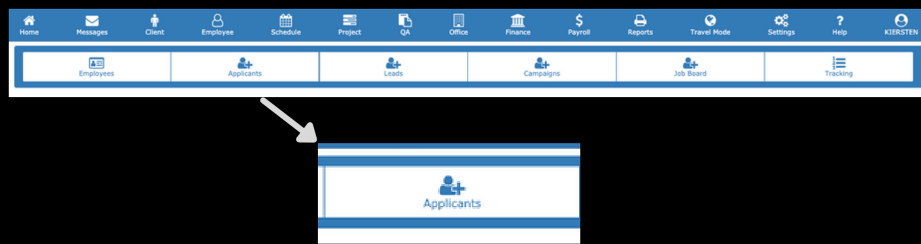
1 Go to 'Employee' Tab

- On your home page, click the 'Employee' tab at the top tool bar.



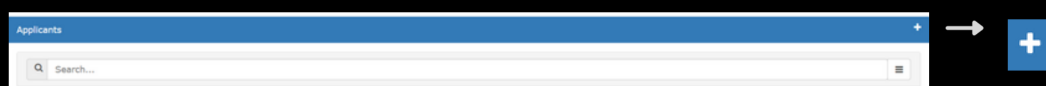
2 Go to Applicants Section

- Click "Applicants" in the sub-menu bar.



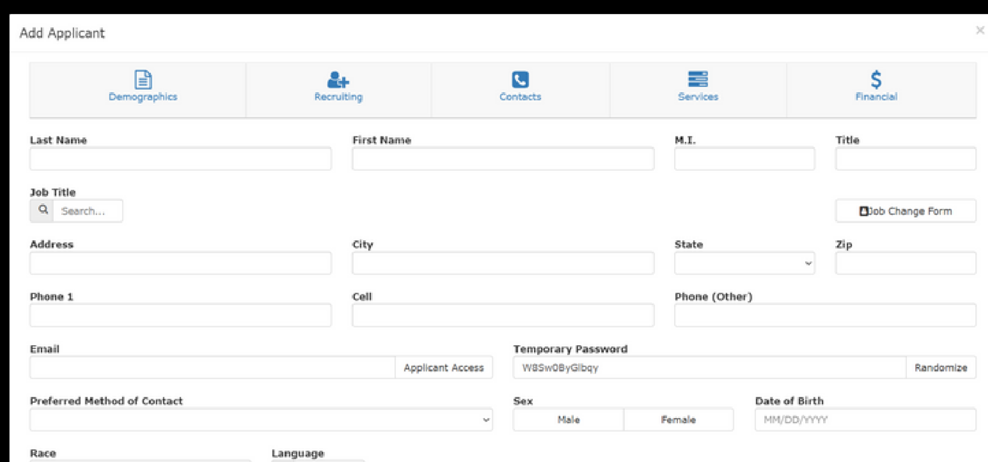
3 Add a New Applicant

- Click the '+' icon on the far right above the search bar.
- A form will open up.



4 Complete the Form

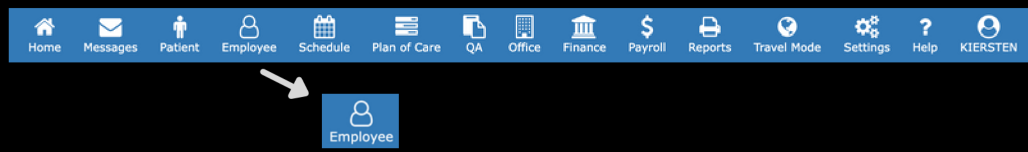
- Fill out the required fields with the Applicant's information.
- Don't forget to click 'Save' on the bottom right of the form.



Creating a Recruiting Campaign

1 **Go to 'Employee' Tab**

- On your home page, click the 'Employee' tab at the top tool bar.



2 **Go to Campaigns Section**

- Click "Campaigns" in the sub-menu bar.

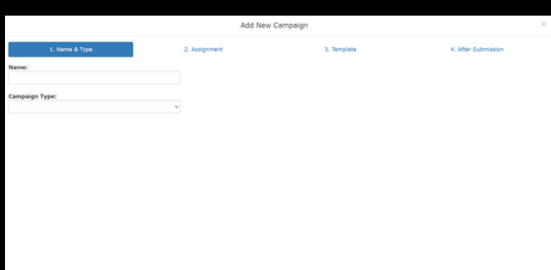
3 **Add a New Campaign**

- Click the '+' icon on the far right above the search bar.
- A form will open up.

4 **Complete the Form**

1. Name the Campaign and select the 'Campaign Type'. Press the 'Next Step' button on the bottom right of the screen.
2. In the 'Assignment' page, enter the Status and assign to Employee/Team or add a Status Attribute Default/Job Title. Press the 'Next Step' button.
3. Fill out the information in the 'Template' screen. Press the 'Next Step' button.
4. Select information in the 'After Submission' screen. Press the 'Save' button.

1.



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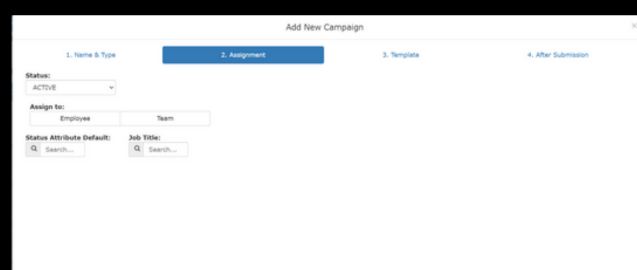

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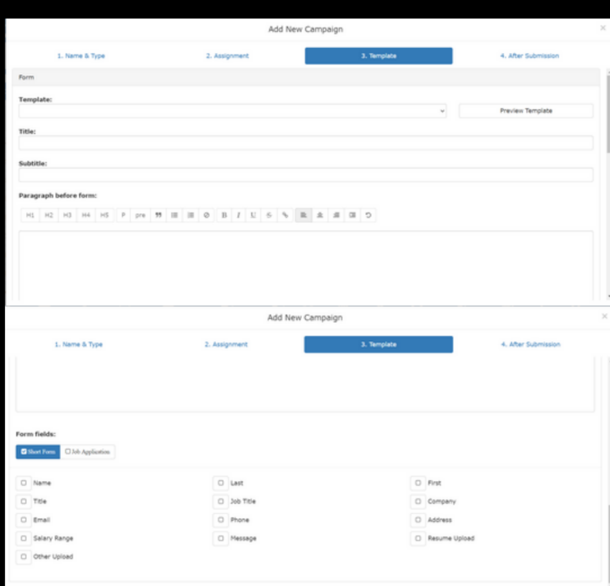

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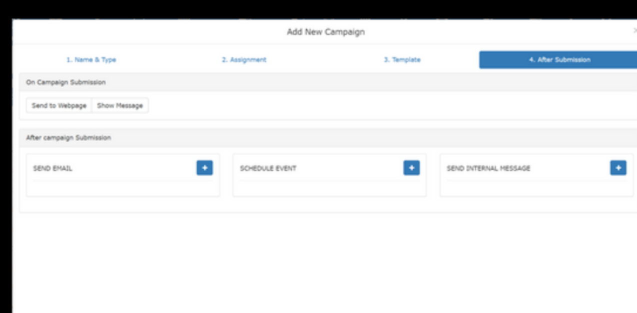


Adding a Job Board to Your Website

1

Go to 'Employee' Tab

- On your home page, click the 'Employee' tab at the top tool bar.

2

Go to Campaigns Section

- Click "Campaigns" in the sub-menu bar.

3

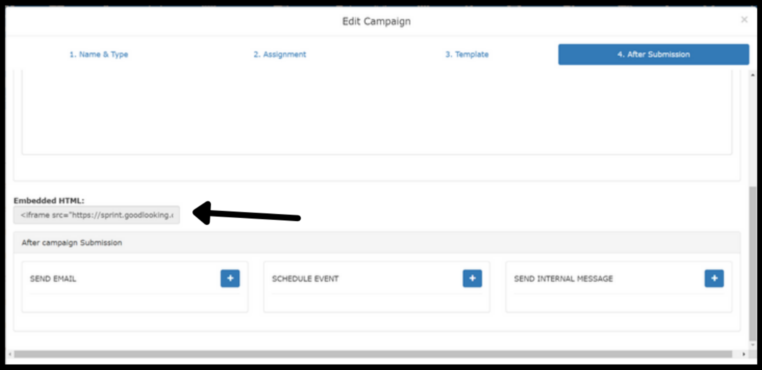
Add a New Campaign

- Click the '+' icon on the far right to the search bar.
- A form will open up. Complete the form to create the campaign.
- NOTE: Remember to create the job title in the system before creating a campaign.

4

Select the Campaign

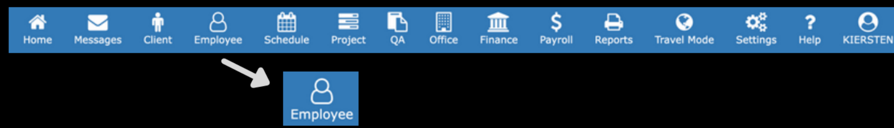
- In the 'Edit Campaign' screen, go to the 'Campaign Type' drop down menu.
- Select 'Embedded' from the 'Campaign Type' drop down menu.
- In the 'After Submission' screen, you will see the Embedded HTML link under 'Embedded HTML'.
- Copy and paste the Embedded HTML into your company website.



Receiving Applicants by Resume Upload

1 **Go to 'Employee' Tab**

- On your home page, click the 'Employee' tab at the top tool bar.

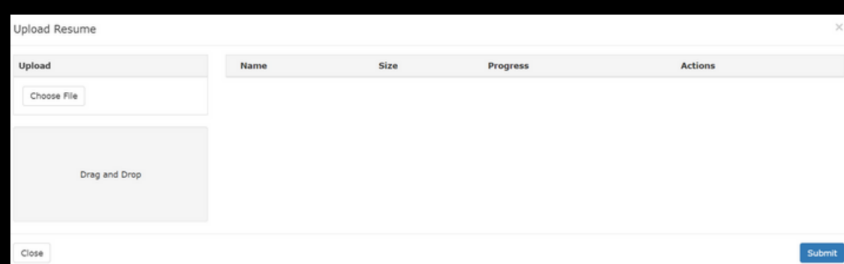


2 **Go to Leads Section**

- Click "Leads" in the sub-menu bar.

3 **Upload Resume**

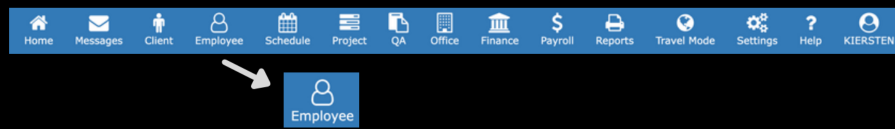
- Click the upload icon to the far right of the search bar so a form opens up.
- From there, you will have the option to drag the file from your computer into the "Drag and Drop' box on the left or you can manually search for the file simply by clicking 'Choose File.' The file will appear in the list and you will click 'Submit' to upload the resume.



Receiving Applicants by Resume Email

1 **Go to 'Employee' Tab**

- On your home page, click the 'Employee' tab at the top tool bar



2 **Go to Campaigns Section**

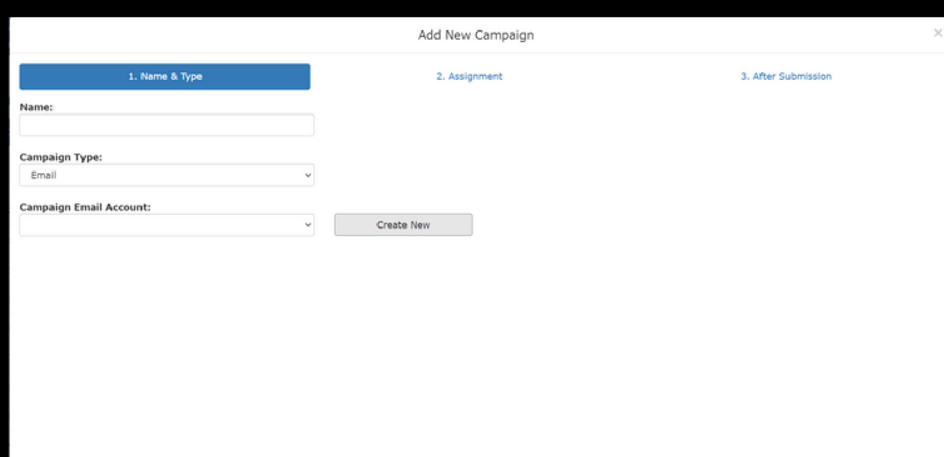
- Click "Campaigns" in the sub-menu bar.

3 **Add a New Campaign**

- Click the '+' icon on the far right to the search bar.
- A form will open up. Complete the form to create the campaign.
- NOTE: Remember to create the job title in the system before creating a campaign.

4 **Select the Campaign**

- In the 'Edit Campaign' screen, go to the 'Campaign Type' drop down menu.
- Assign the 'Campaign Email Account' to either an existing email address by selecting the drop down menu or create a new email address by selecting the 'Create New' button to the right of the 'Campaign Email Account'.
- Select 'Email' from the 'Campaign Type' drop down menu.
- Resumes sent via email will be received by the Campaign Email Account.



Receiving Applicants by Web Form

1 Go to 'Employee' Tab

- On your home page, click the 'Employee' tab at the top tool bar.

2 Go to Campaigns Section

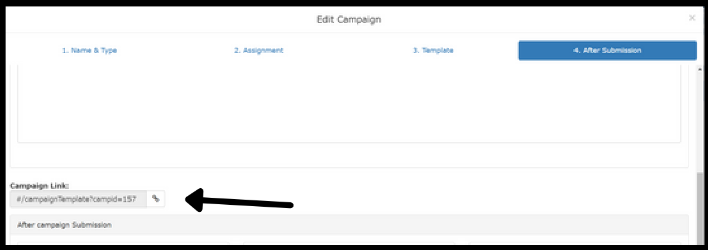
- Click "Campaigns" in the sub-menu bar.

3 Add a New Campaign

- Click the '+' icon on the far right to the search bar.
- A form will open up. Complete the form to create the campaign.
- NOTE: Remember to create the job title in the system before creating a campaign.

4 Select the Campaign

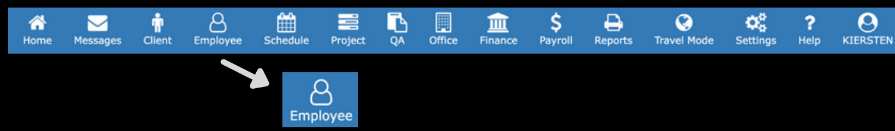
- In the 'Edit Campaign' screen, go to the 'Campaign Type' drop down menu.
- Select 'Landing Page' in the 'Campaign Type' dropdown menu.
- A 'Campaign Link' will be created and can be seen in the 'After Submission' screen.
- Copy and paste the Campaign Link into your company website.
- When the Campaign Link is selected, a landing page will open and applicants will be able to input their application information.



Receiving Applicants by Full Application

1 **Go to 'Employee' Tab**

- On your home page, click the 'Employee' tab at the top tool bar



2 **Go to Campaigns Section**

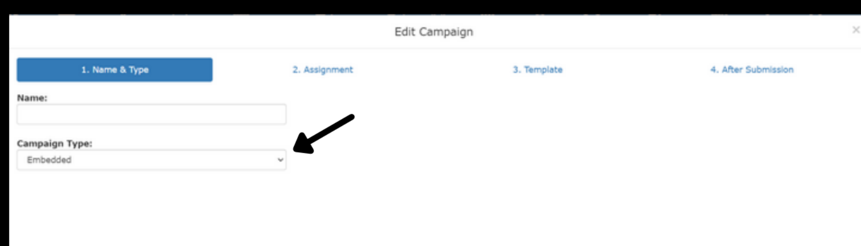
- Click "Campaigns" in the sub-menu bar.

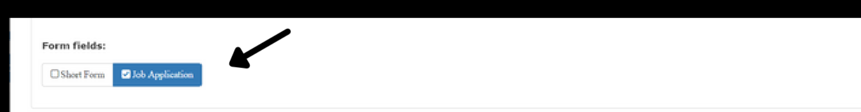
3 **Add a New Campaign**

- Click the '+' icon on the far right to the search bar.
- A form will open up. Complete the form to create the campaign.
- NOTE: Remember to create the job title in the system before creating a campaign.

4 **Select the Campaign**

- In the 'Name & Type' screen, go to the 'Campaign Type' drop down menu.
- Select 'Embedded' from the 'Campaign Type' drop down menu.
- In the 'Template' screen, scroll down and select the checkbox next to 'Job Application'.





Screening Leads

1 **Go to 'Employee' Tab**

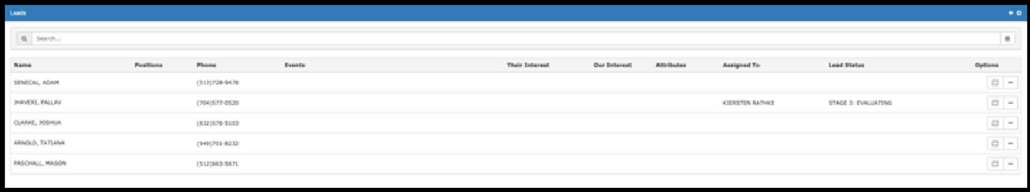
- On your home page, click the 'Employee' tab at the top tool bar.

2 **Go to Leads Section**

- Click "Leads" in the sub-menu bar.

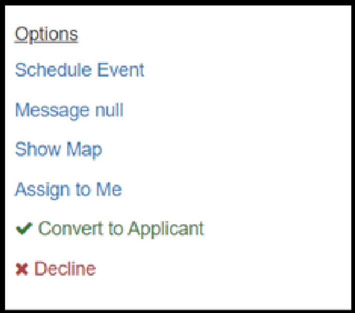
3 **Select the Lead**

- Within the list of leads, select the candidate you would like to screen.
- Click the option button (three dots) on the fair right.



4 **Select Lead Option**

- The lead's options menu will appear.
- Click on the desired option.



Convert Leads to Applicants

1

Go to 'Employee' Tab

- On your home page, click the 'Employee' tab at the top tool bar.

2

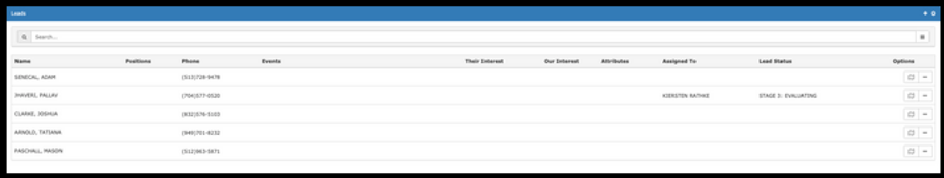
Go to Leads Section

- Click "Leads" in the sub-menu bar.

3

Select the Lead

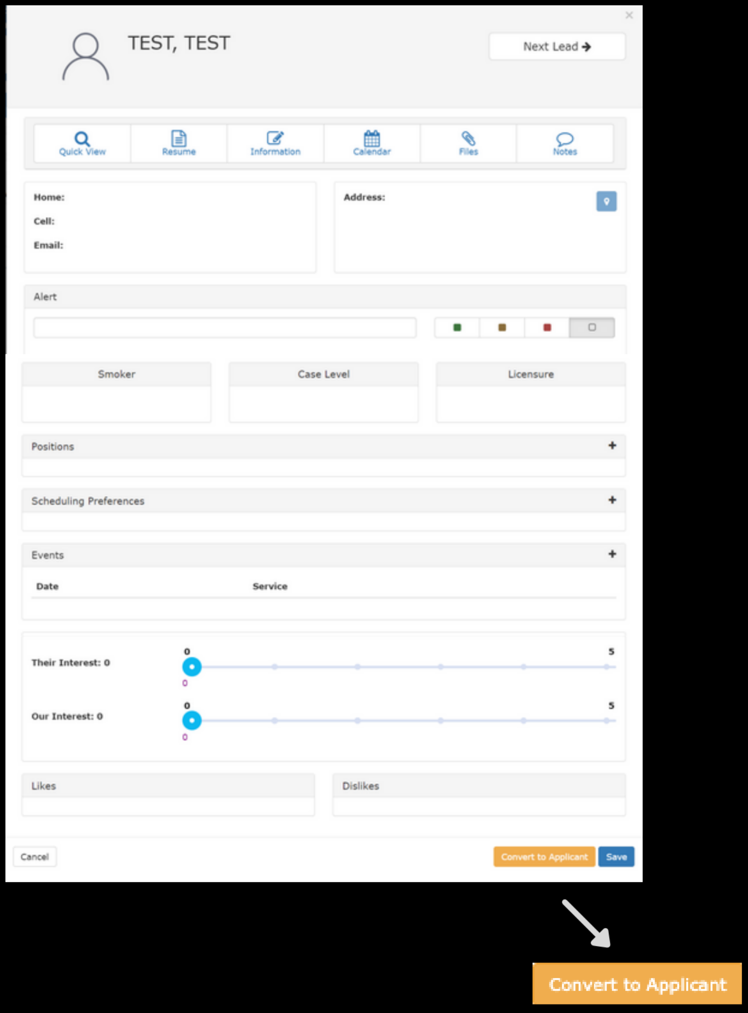
- Within the list of leads, select the candidate you would like to convert to an applicant.



4

Convert to Applicant

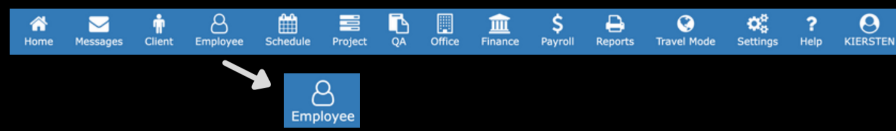
- The lead's form will open up.
- Scroll down to the bottom of the form and click the yellow "Convert to Applicant" button.



Give an Applicant Portal Access

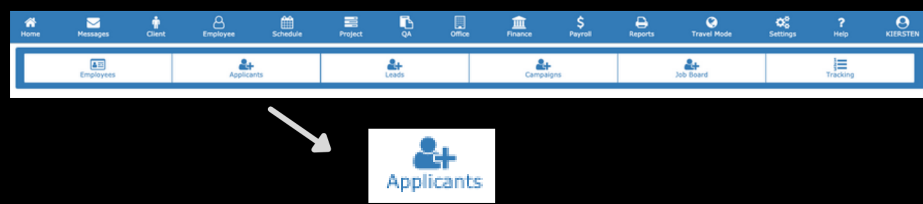
1 **Go to 'Employee' Tab**

- On your home page, click the 'Employee' tab at the top tool bar.



2 **Go to Applicants Section**

- Click "Applicants" in the sub-menu bar.

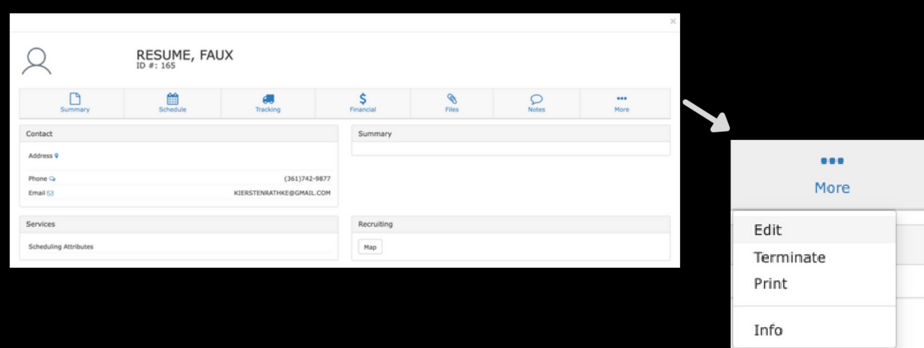


3 **Select the Applicant**

- Within the list of applicants, select the candidate you would like to give access to the portal.

4 **Edit the Applicant Profile**

- When the Applicant Information form opens up, click on the "More" option to the far right so a drop down opens. Click on 'Edit.'



5 **Give Applicant Access**

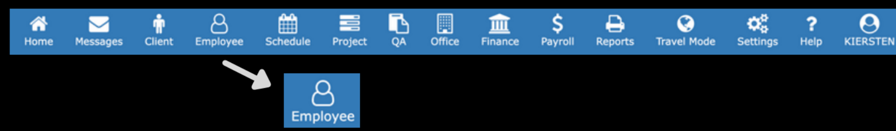
- The 'Edit Employee' form will open. Next to the email field has an 'Applicant Access' button. Click that so it is highlighted in the platform's default color.

*** Always remember to click 'Save'.***

Hiring an Applicant

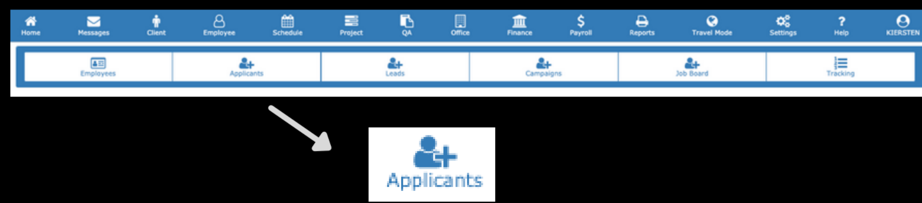
1 **Go to 'Employee' Tab**

- On your home page, click the 'Employee' tab at the top tool bar.



2 **Go to Applicants Section**

- Click "Applicants" in the sub-menu bar.

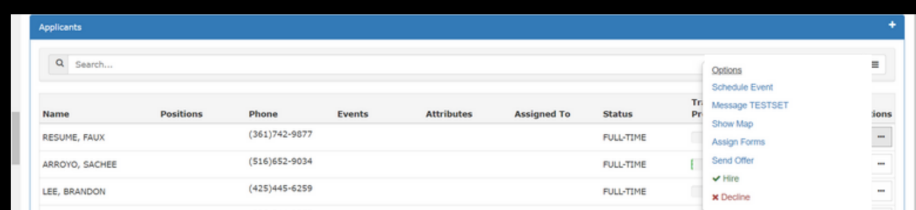


3 **Select the Applicant**

- Within the list of applicants, select the candidate you would like to give access to the portal.
- Click on the options button (three dots) on the fair right of the chosen applicant.

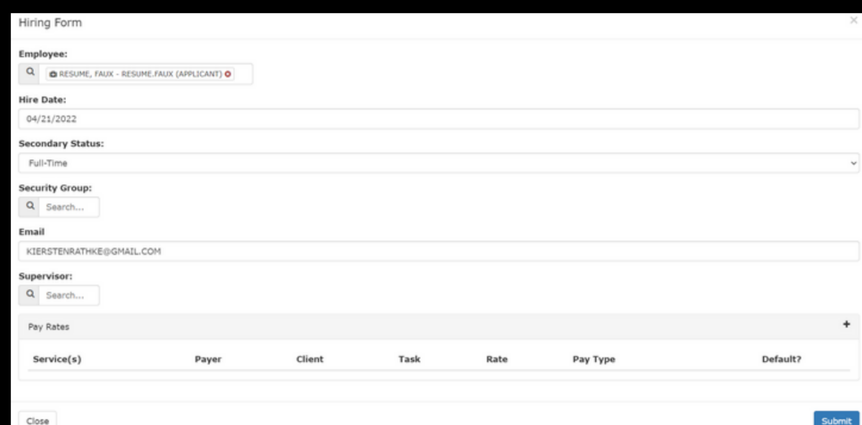
4 **Select Hire from Options Menu**

- The applicant options menu will appear.
- Click on 'Hire'.



5 **Complete the Hiring Form**

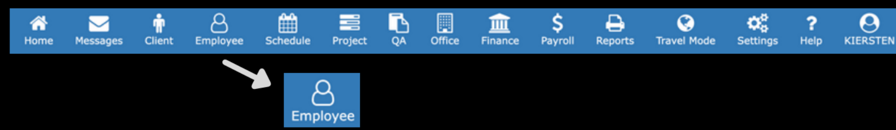
- The Hiring Form will open. Complete all the open fields and assign the new hire to a security group.
- Press submit.



Entering Payrates

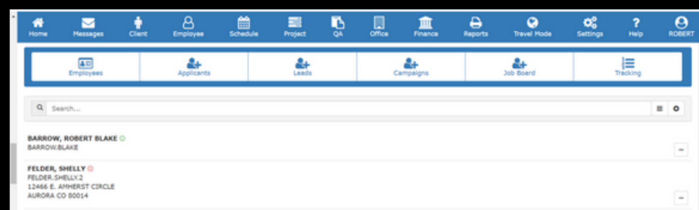
1 Go to 'Employee' Tab

- On your home page, click the 'Employee' tab at the top tool bar.



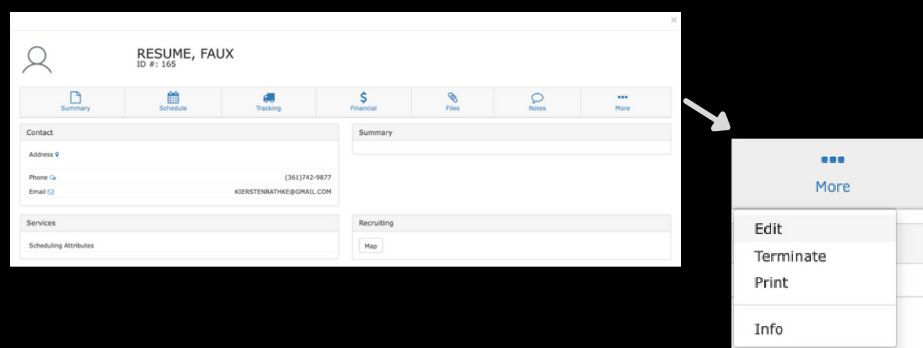
2 Select the Employee

- Click the employee's name.



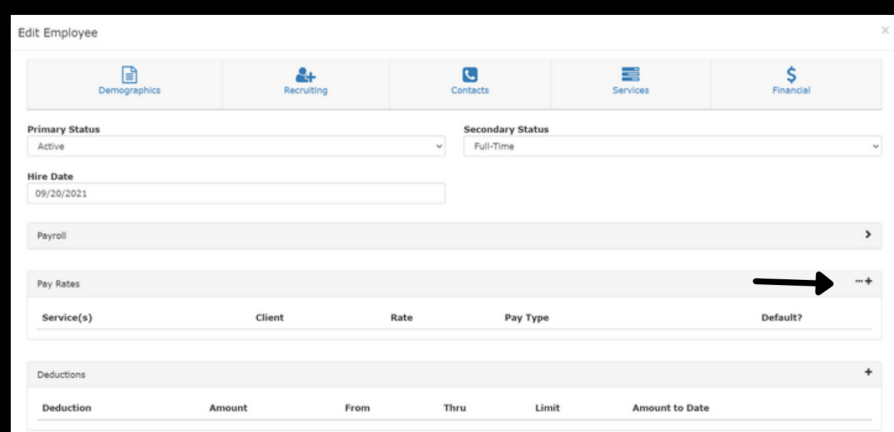
3 Edit the Employee Profile

- When the Employee Information form opens up, click on the "More" option to the far right so a drop down opens. Click on 'Edit.'



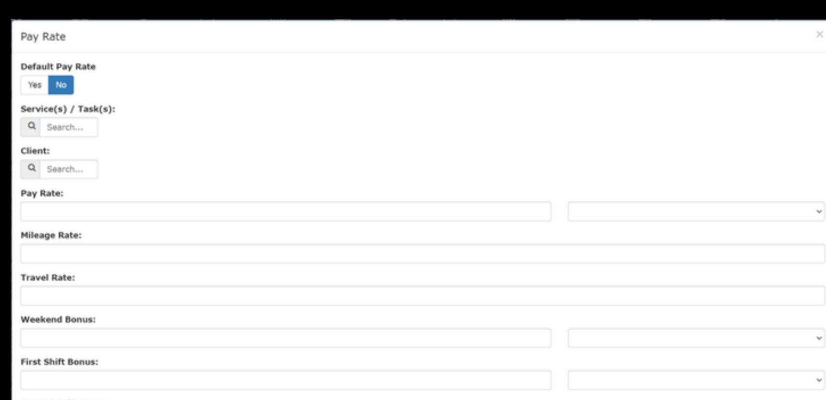
4 Select the Financial Tab

- Select the Financial Tab in the 'Edit Employee' Form.
- Then select the "+" button to the far right of the 'Pay Rates' section.



5 Complete Pay Rate Form

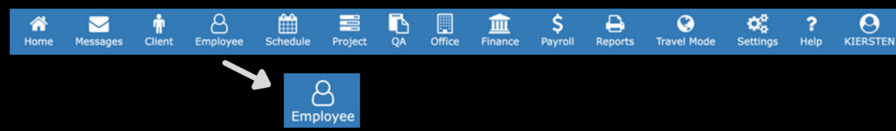
- Complete all of the open fields in the 'Pay Rate' Form.
- Press 'Submit' button on bottom right when finished.



Tracking Employee Documents

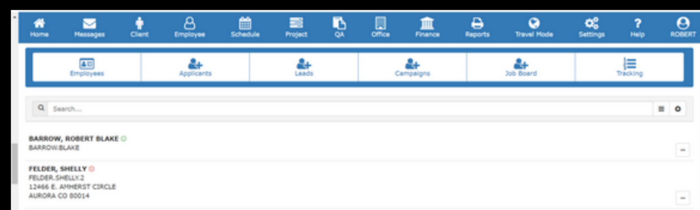
1 **Go to 'Employee' Tab**

- On your home page, click the 'Employee' tab at the top tool bar.



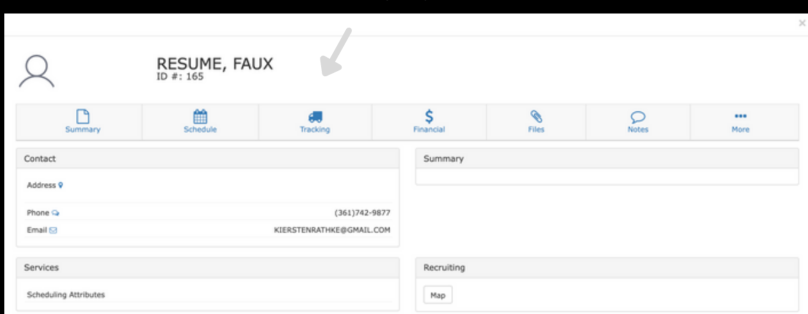
2 **Select the Employee**

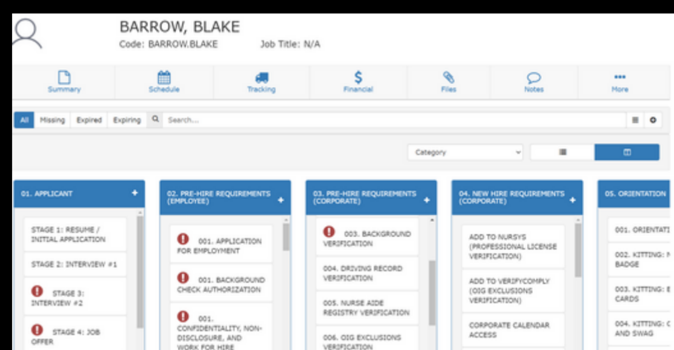
- Click the employee's name.



3 **Select Tracking Tab**

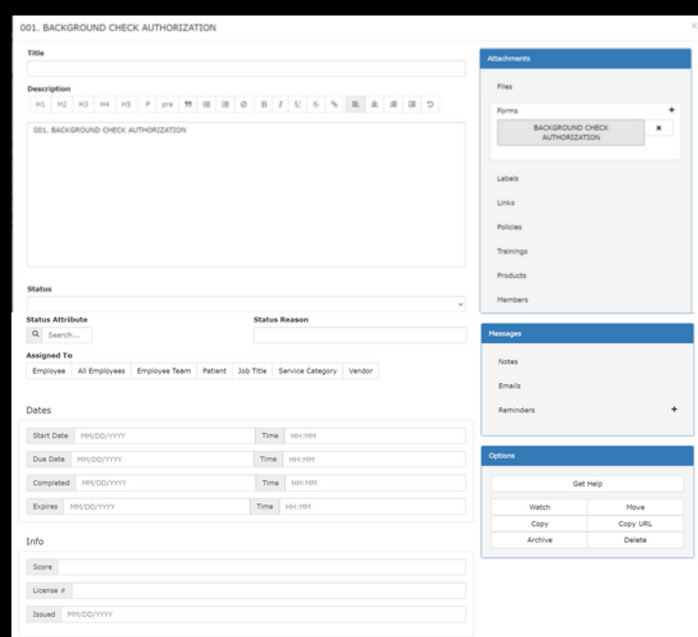
- Select the 'Tracking' tab to review employee documents.
- Use the 'All', 'Missing', 'Expired' and 'Expiring' buttons to the left of the search bar to narrow down employee documents.





4 **Select a Tracking Item**

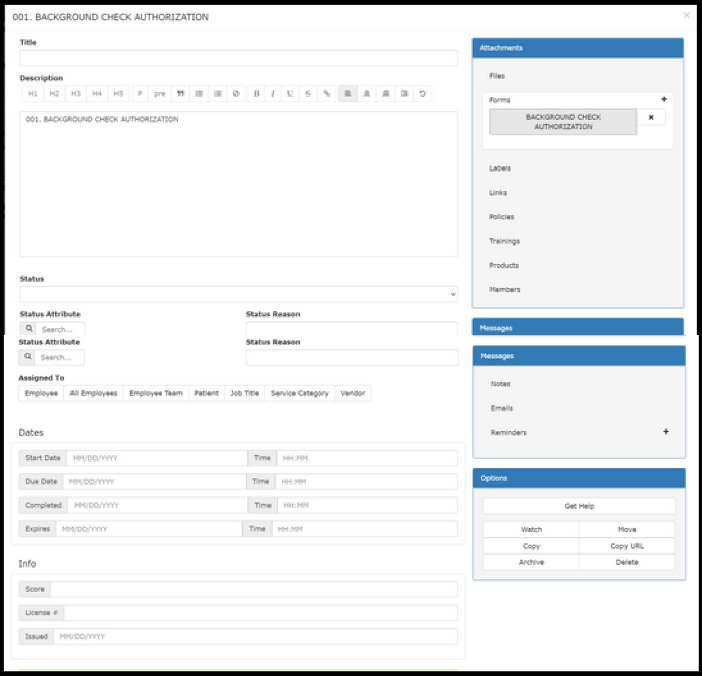
- Select the tracking item/document you would like to edit/review for the employee.
- This will bring up the tracking item page.

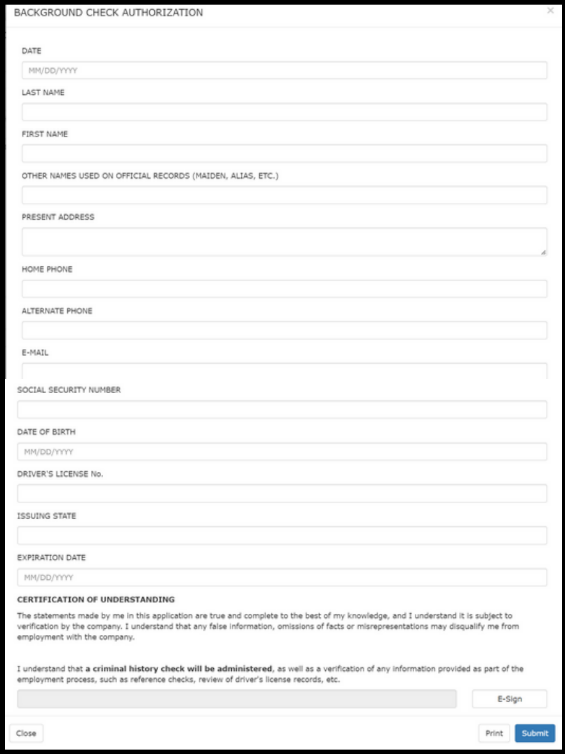


Tracking Employee Documents Continued

5 **Select the Form**

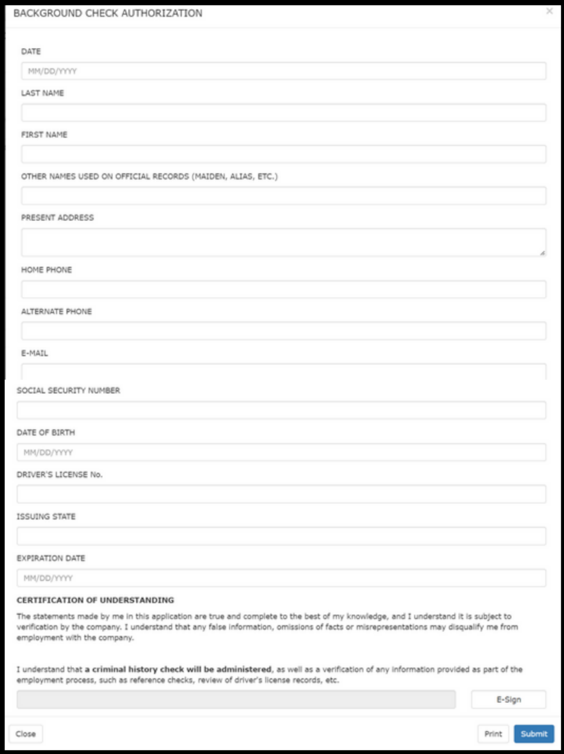
- Select the attached form on the right.
- This will bring up the form page.





6 **Review/Edit the Form**

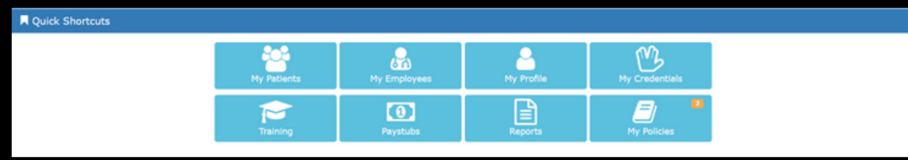
- Use the form page to review/edit the employee's form.
- You can use the buttons at the bottom of the form to close the form, print the form, and/or submit any changes to the form.



Quick Shortcuts: Training

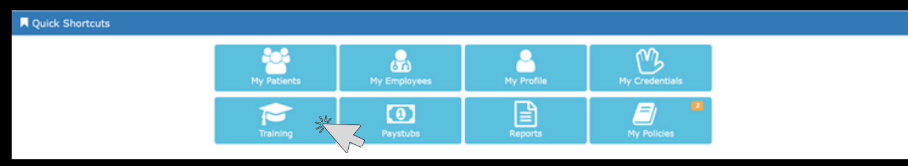
1 Go to Quick Shortcuts

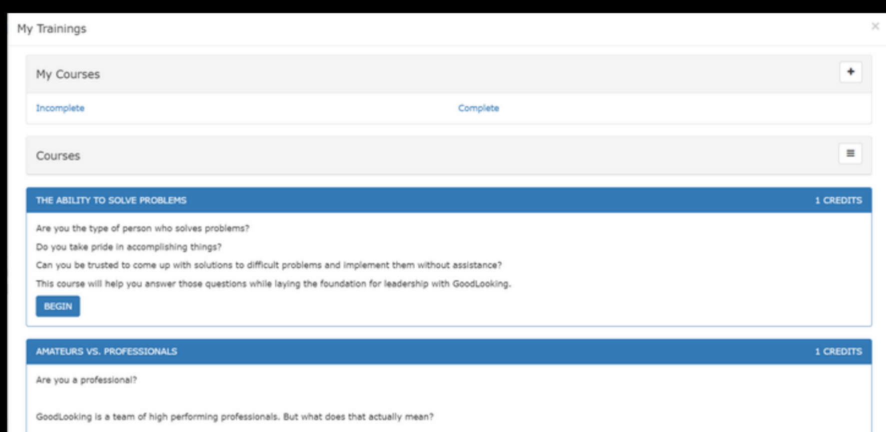
- On the home page, scroll down all the way to the bottom.
- You will find the 'Quick Shortcuts' section.



2 Select My Trainings

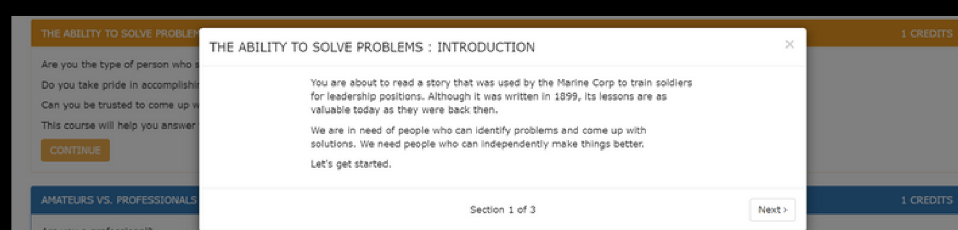
- Select the 'Training' tab.
- A list of your assigned training courses will open.
- You can select between Incomplete and Complete courses under the 'My Courses' section.





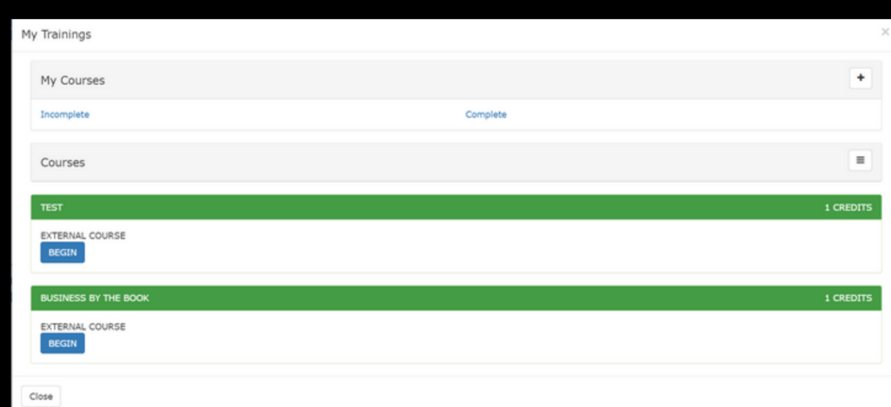
3 Select a Course

- Select a training course and select the 'Begin' button to start the selected training.
- The selected training course will open.



4 Take a Test

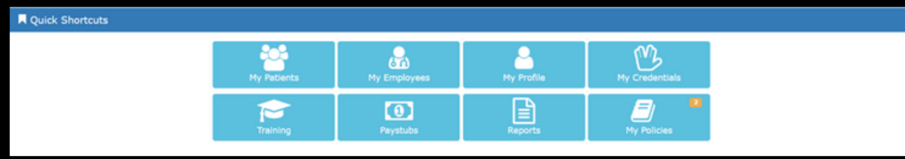
- Selecting the 'Complete' button under 'My Courses' will open a list of the training courses you have finished but have not taken the tests for.
- Select a test and select the 'Begin' button under the test title.
- The test will open.



Quick Shortcuts: My Crendentials

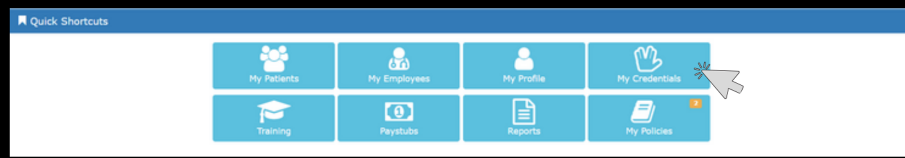
1 Go to Quick Shortcuts

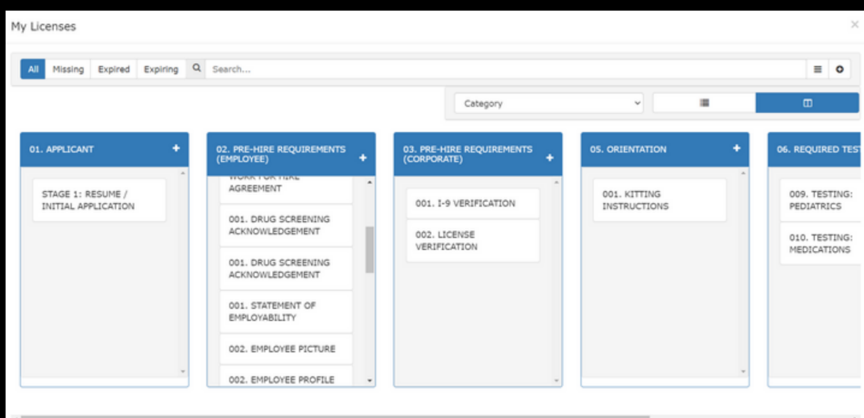
- On the home page, scroll down all the way to the bottom.
- You will find the 'Quick Shortcuts' section.



2 Select My Credentials

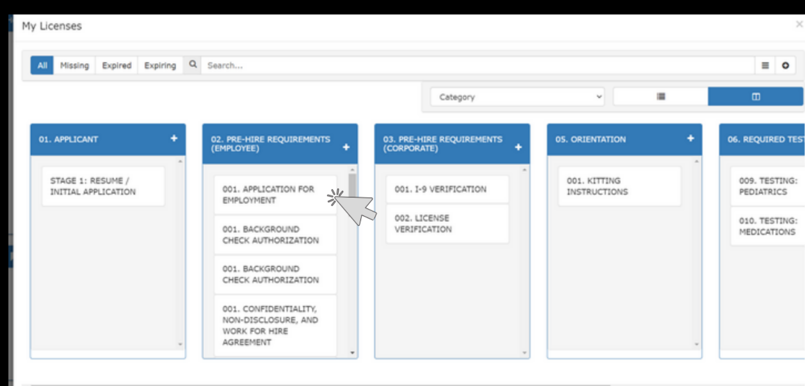
- Select the 'My Credentials' tab.
- A list of your assigned HR documents will open under 'My Licenses'.





3 Select a Document

- Choose an item by selecting the item tab.
- The selected item will open.



4 Complete the Form/Upload File

- Once the item has opened, you may open the embedded form by selecting the Form under 'Forms', upload a file, assign to an employee, or write a note.