APRIL 30, 2024

BULLHORN PARTNER USER GUIDE

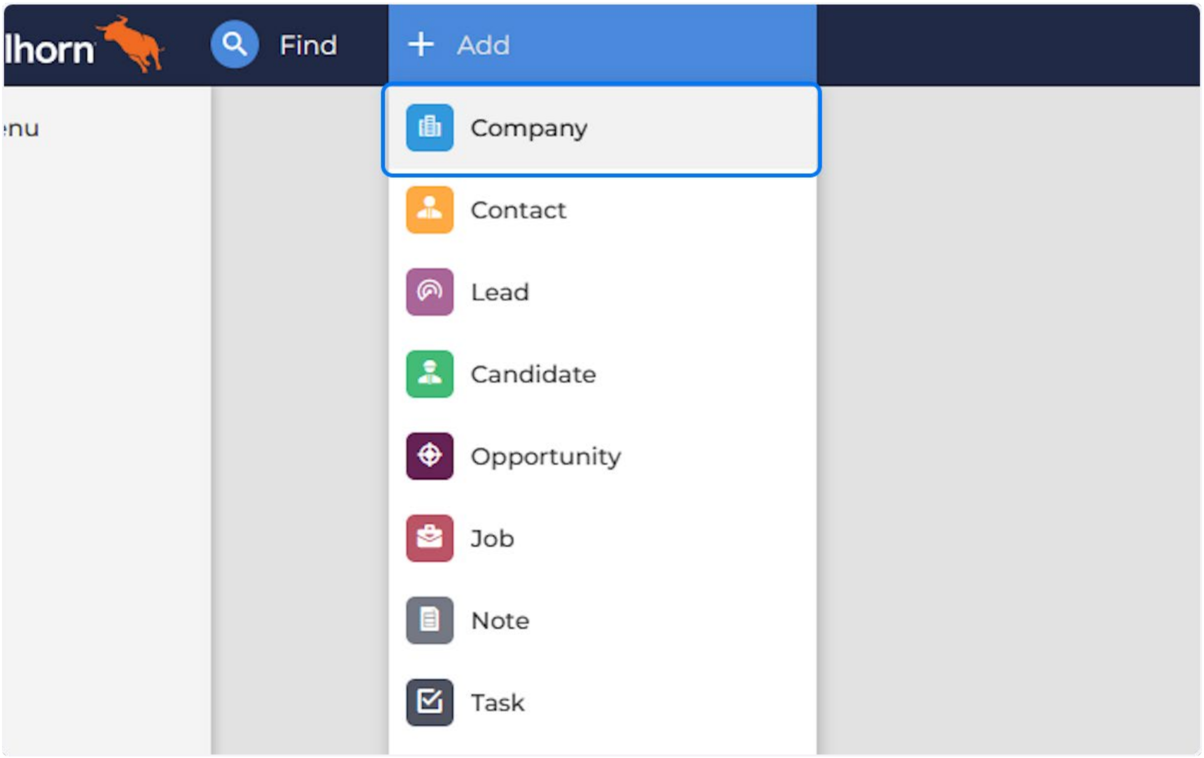
STAFFING MANAGEMENT GROUP: PARTNER PROGRAM

TECHNOLOGY DEPARTMENT
STAFFING MANAGEMENT GROUP

Table of Contents

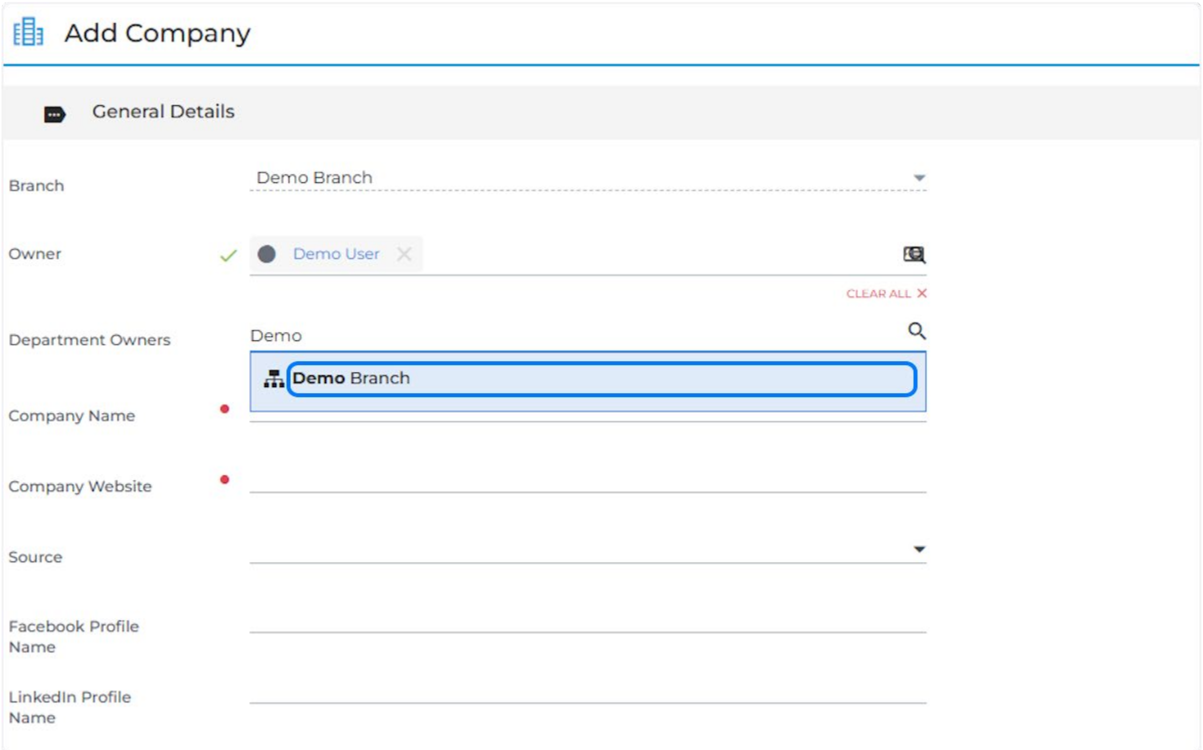
Customer Creation

1. Click on Add > Company from the dropdown.

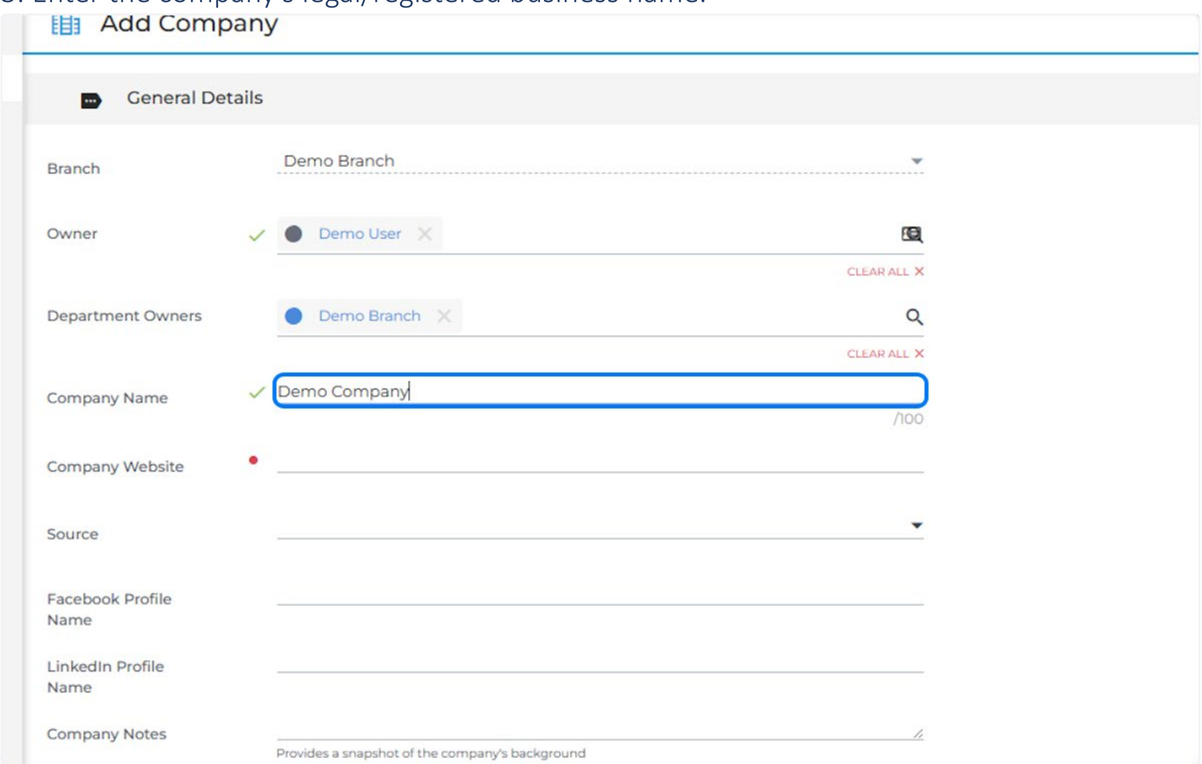


2. Search for your company/branch name in the Department Owners field and select the proper option.

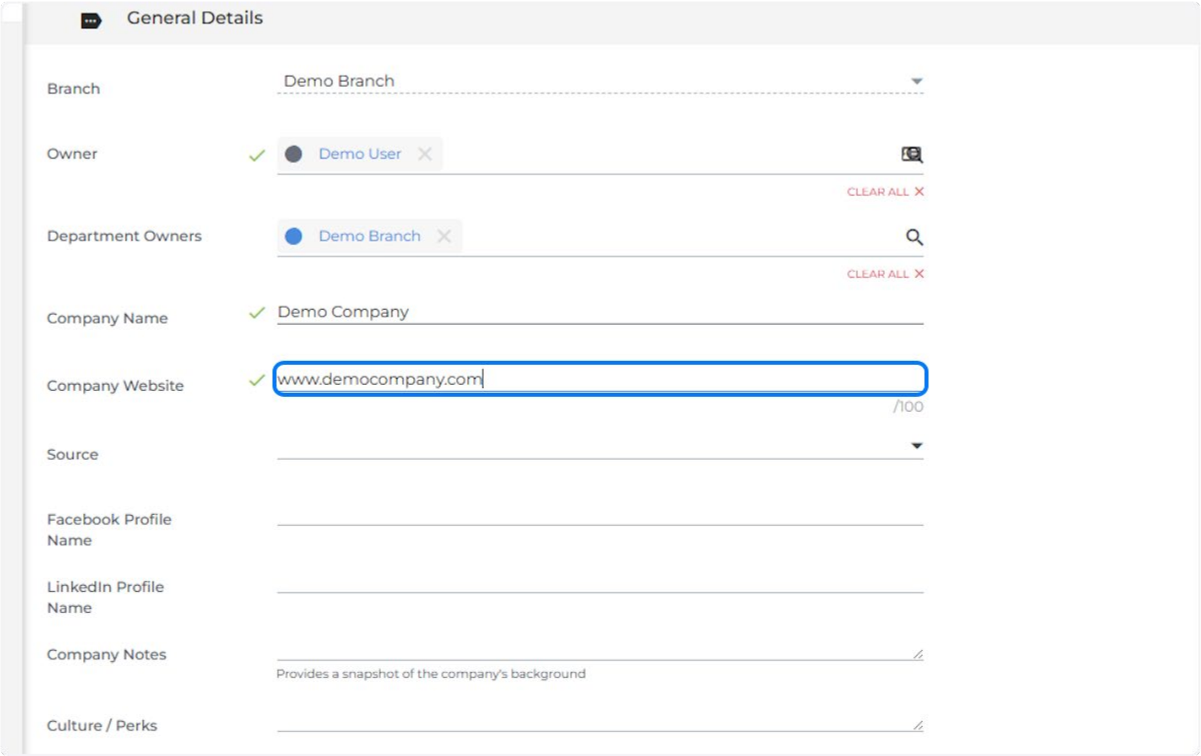
Note: This field will allow all users under your department to have access to the company record. Otherwise, they will not be able to see this record. Other departments may display; **DO NOT** select them unless you are trying to share this record with another partner.



3. Enter the company's legal/registered business name.

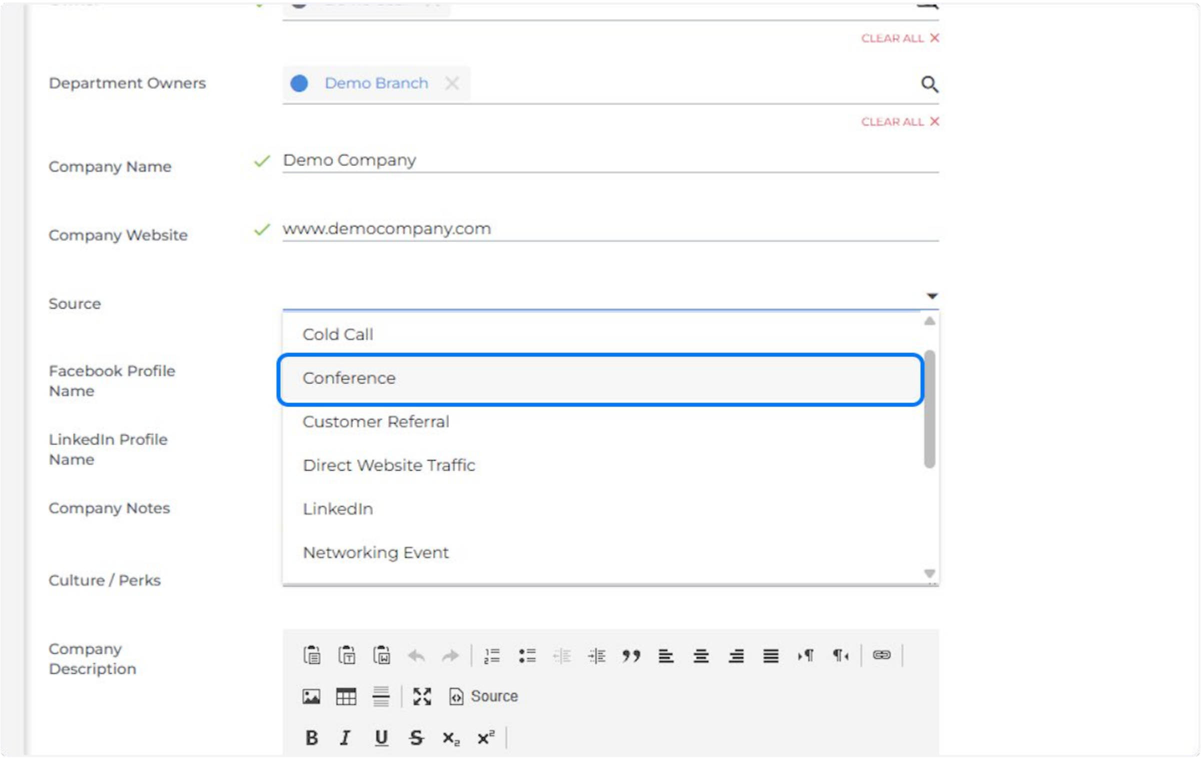


4. Enter the company's website URL address.



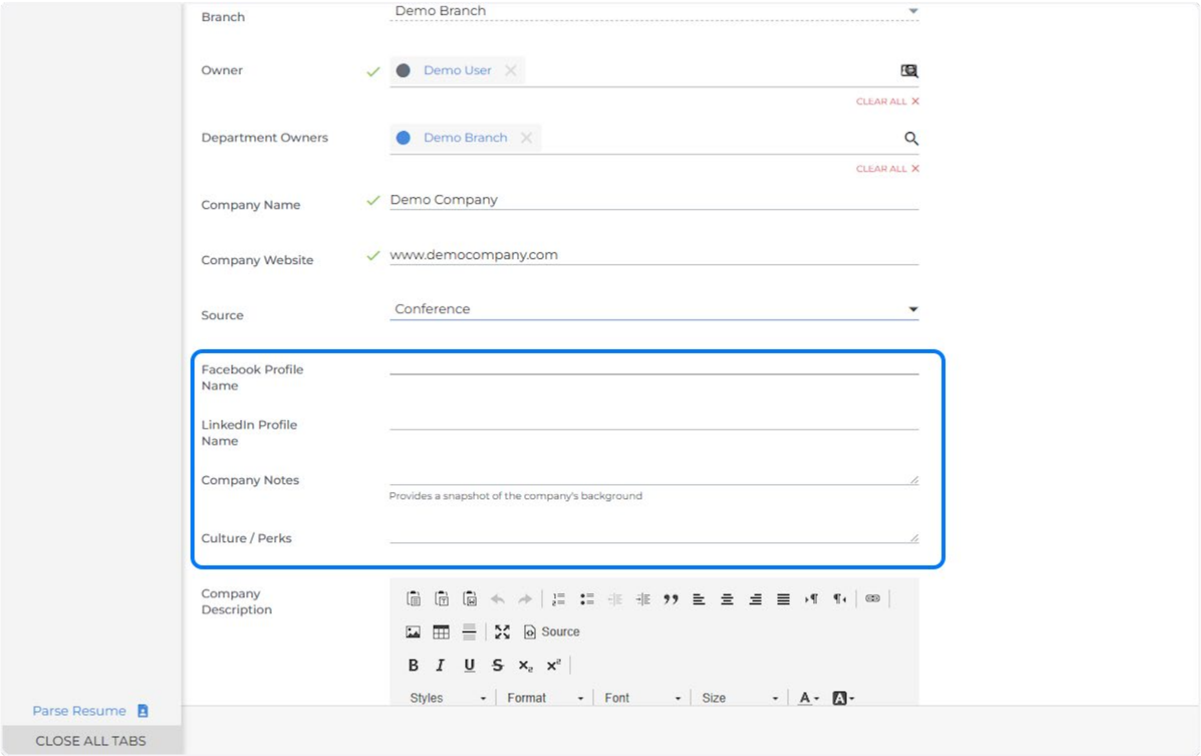
5. Optional: Add a source type from the Source field dropdown menu.

Note: This can be useful for reporting and analytical purposes down the road.



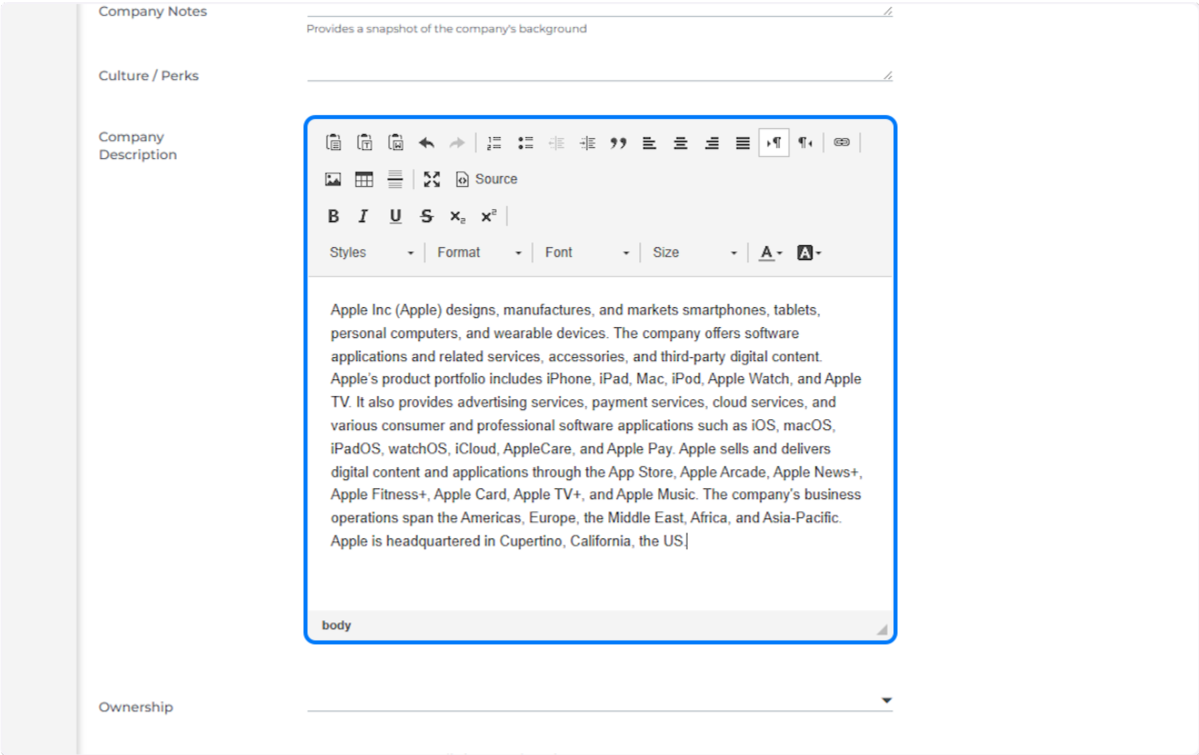
6. Optional: Enter the company social media URLs, Company Notes and Culture/Perks.

Note: This information may be useful to another team member.

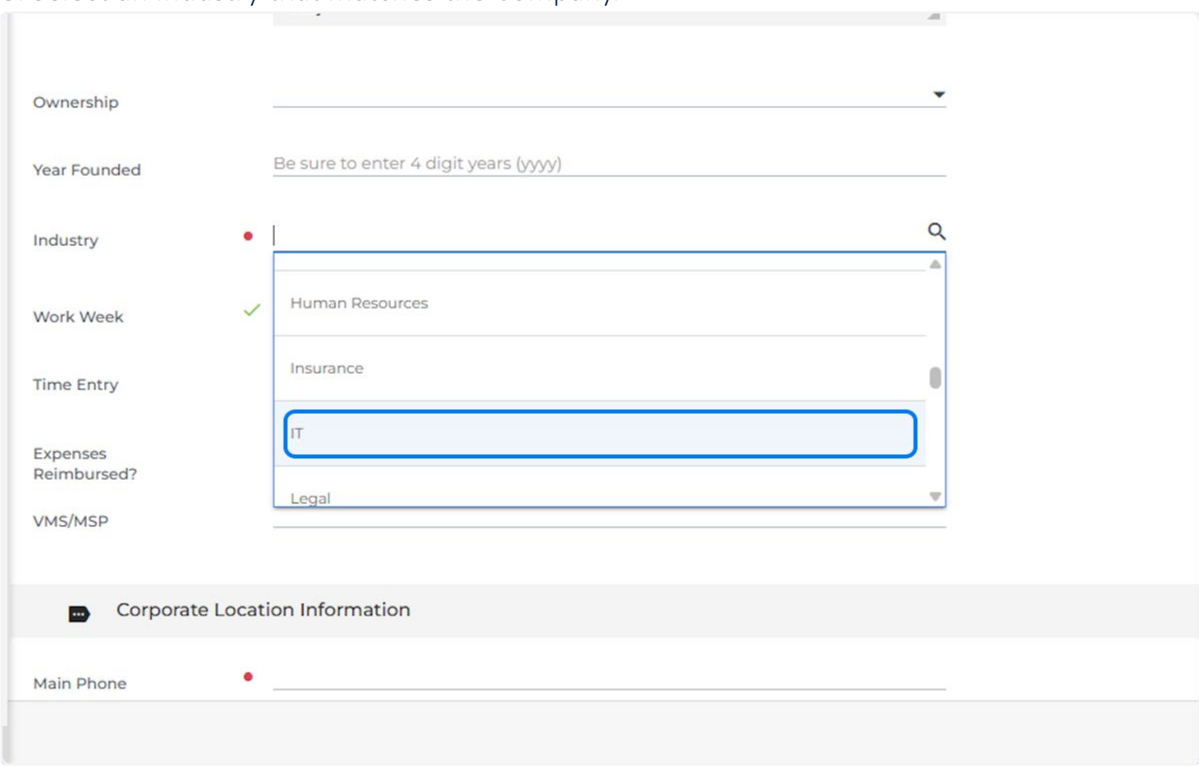


7. Optional: Add a company description into the Company Description field,

Similar to the description used for Apple below.

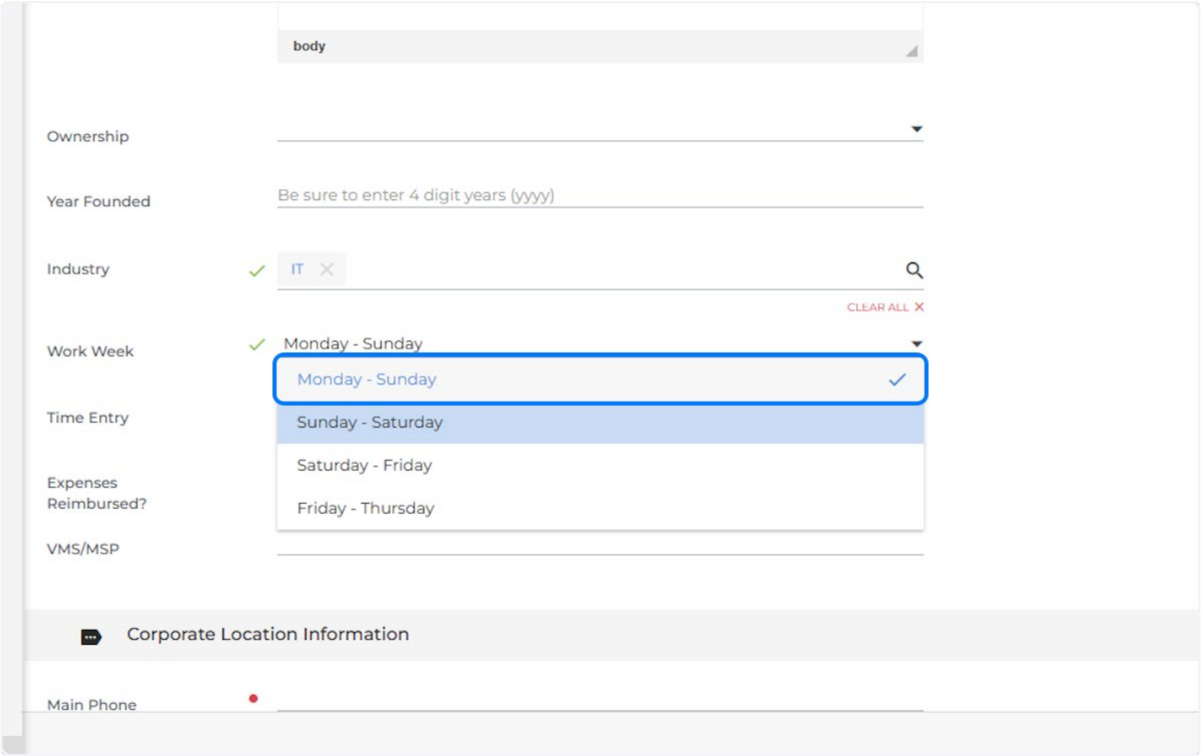


8. Select an Industry that matches the Company.

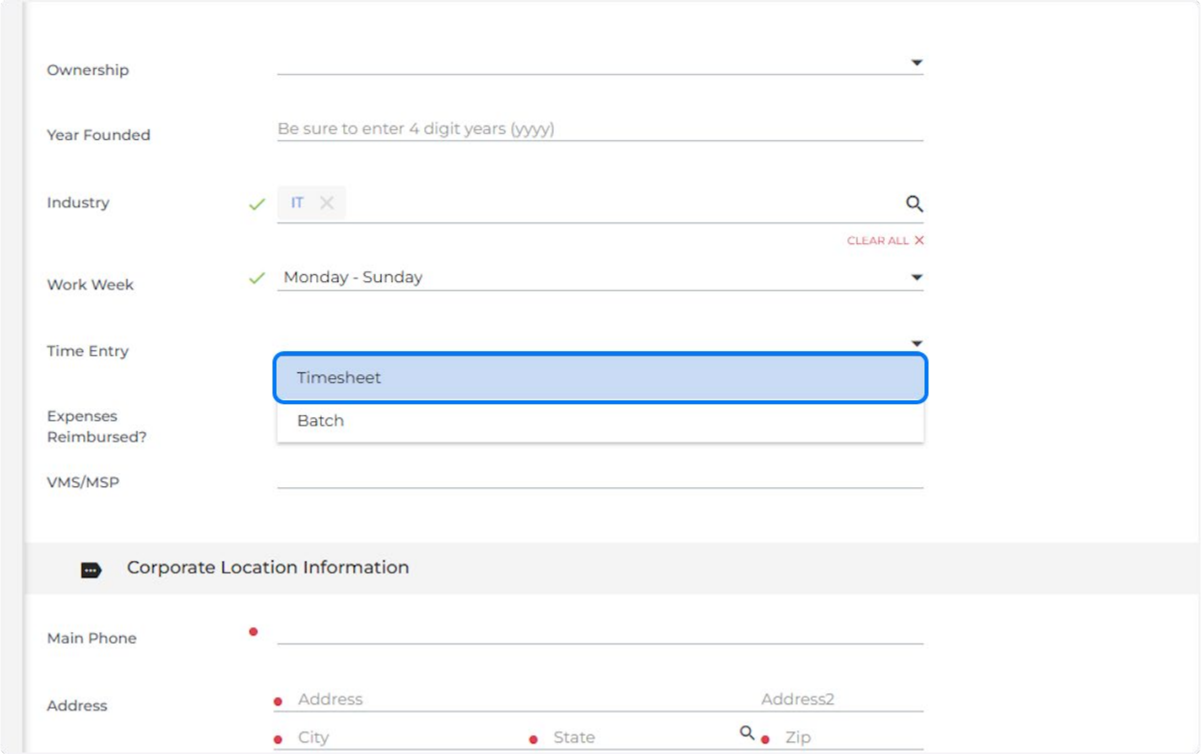


9. If known when creating the record, select the 7-day range when the company work week occurs.

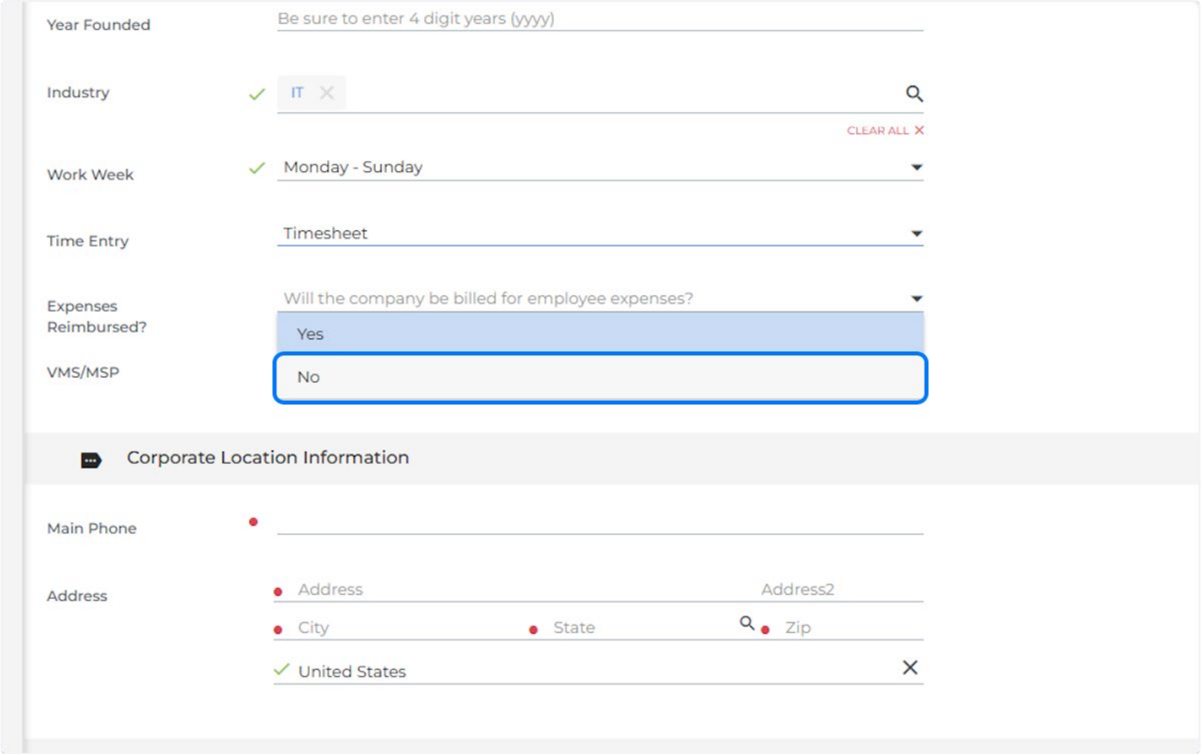
Important Note: This field can be entered later after agreements are signed but is crucial to be in place when jobs are being created. This is a correlated field and carries over to Jobs > Placements.



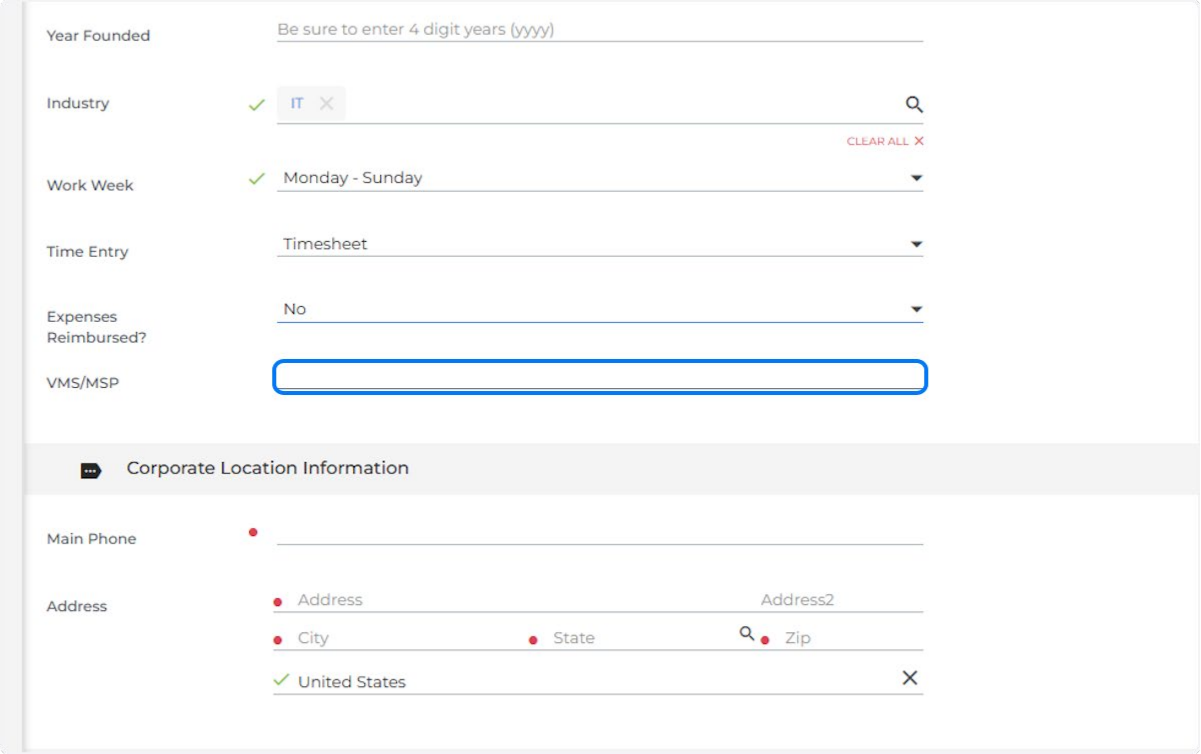
10. If known when creating the record, select the Time Entry method that will be used for the company. Timesheet= Web Time Entry within our system. Batch= Paper timecards, reports provided by the customer, or any other time entry system not provided by our system.



11. Optional: Adding an answer for this field will signal whether the company allows for expense reimbursements.



12. Enter the full name of the VMS/MSP that is associated with the company. This is an optional field but is mandatory if applicable to the customer.



The Corporate Location Information section review in the next steps is strictly used for credit approval purposes. This should be the main address that is used by the company and may differ from a branch location and/or worksite location.

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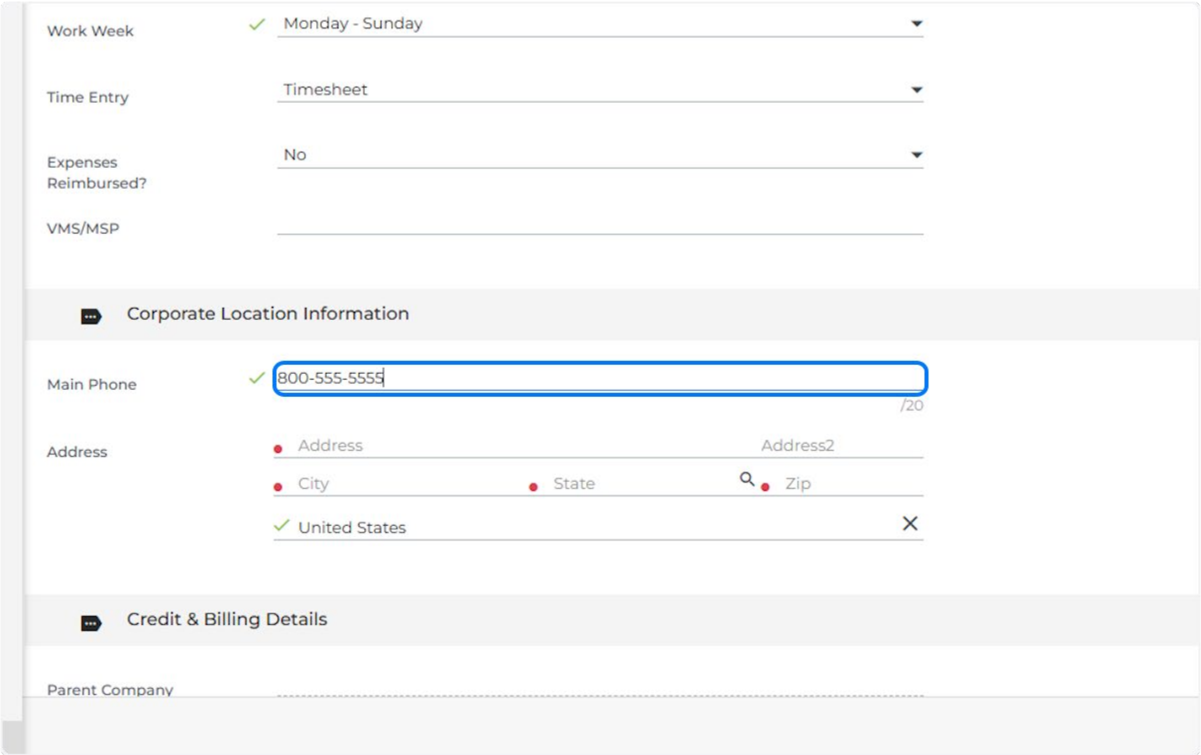
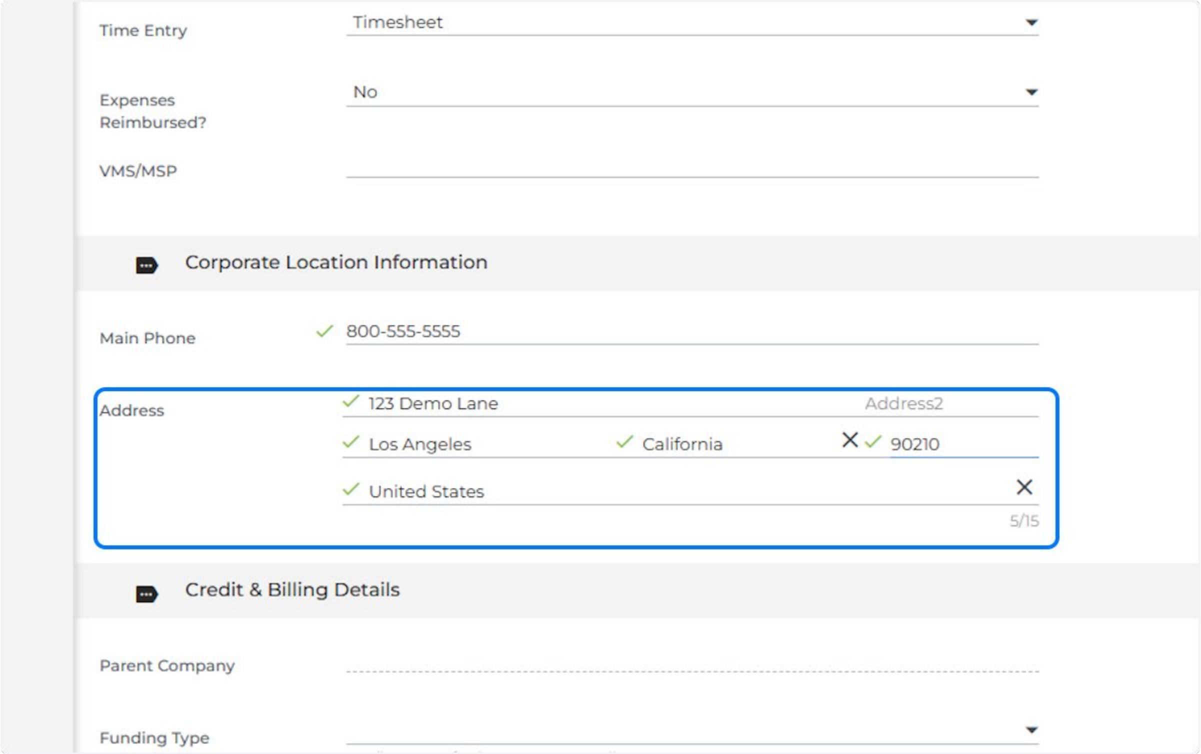
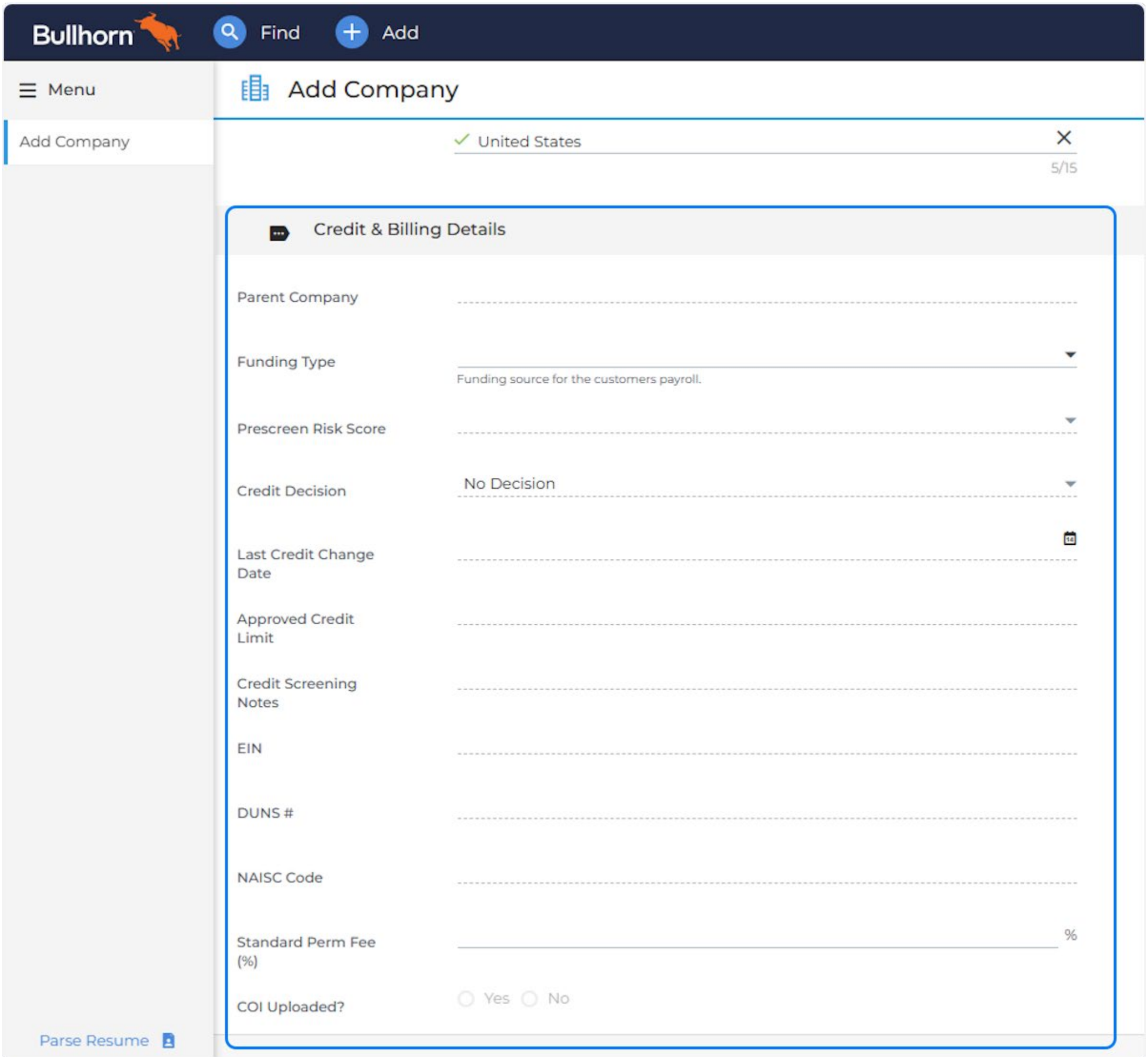
13. Enter the corporate phone number.



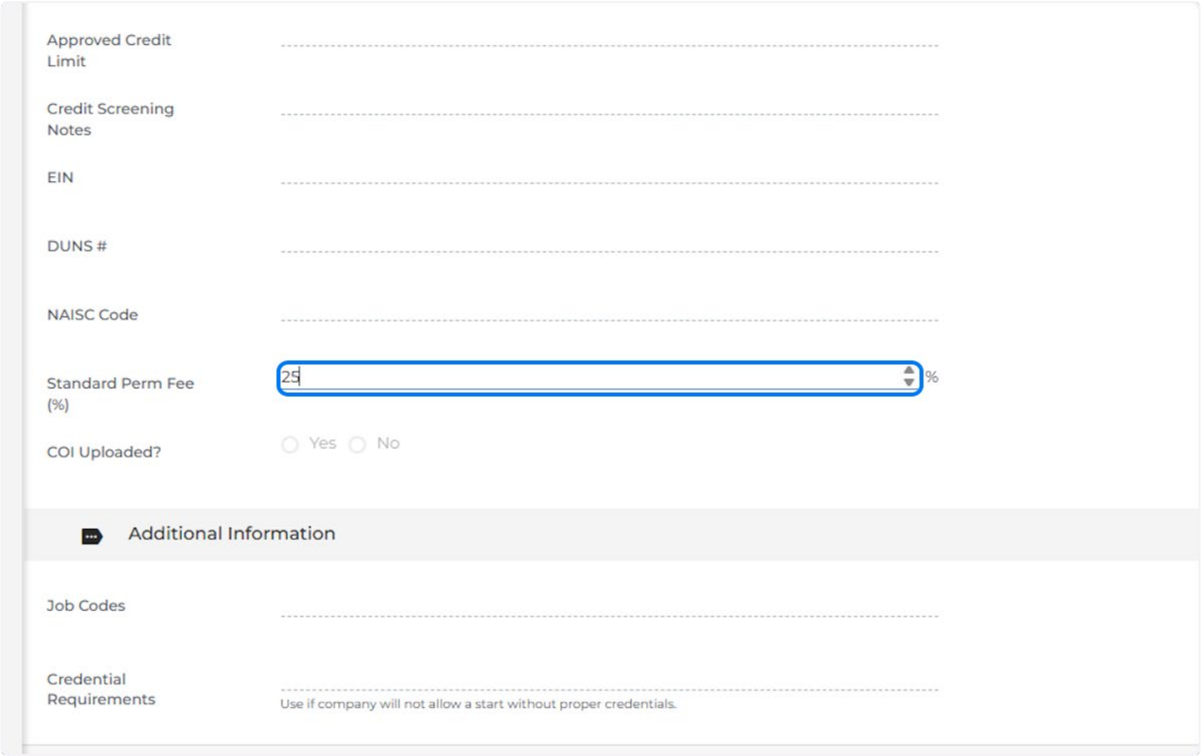
14. Complete the corporate address information with proper and full spelling, no abbreviations.



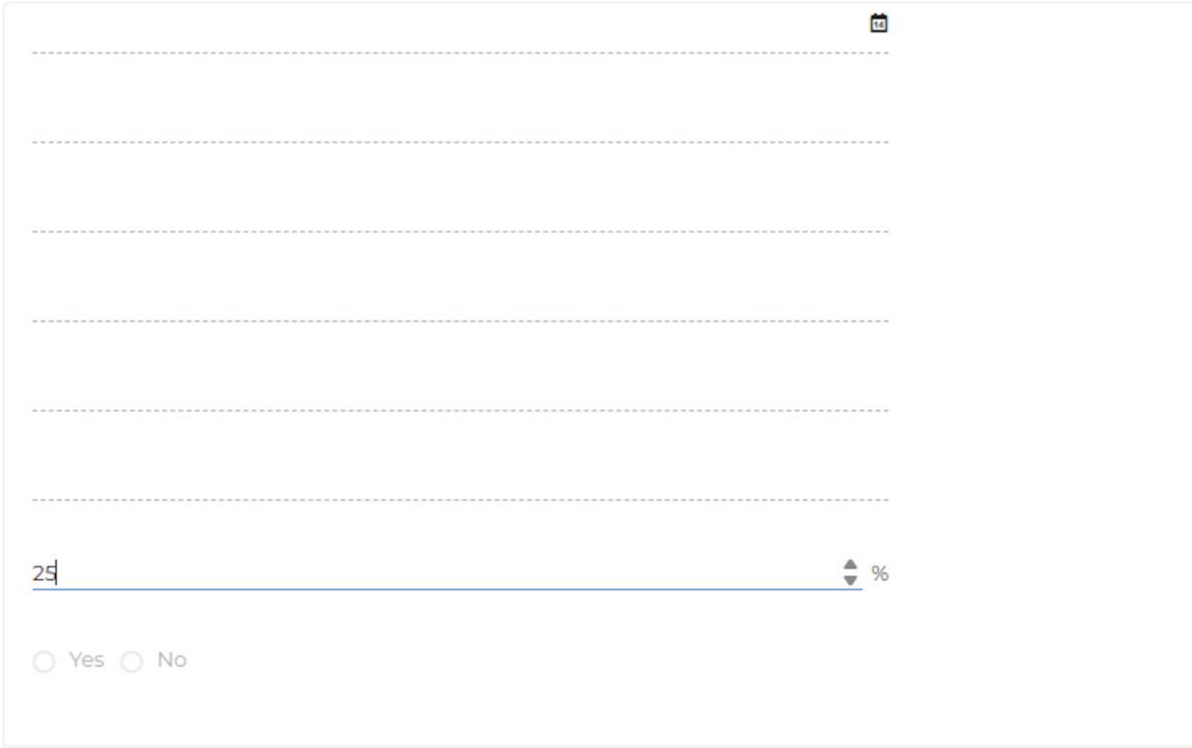
15. The Credit & Billing Details section is used for the back-office team to complete. These fields will be viewing only access for you, except for the Standard Per Fee (%) field.



16. Optional: Enter a standard perm fee percentage amount that will be blanketed for all Direct Hire/Perm placements.



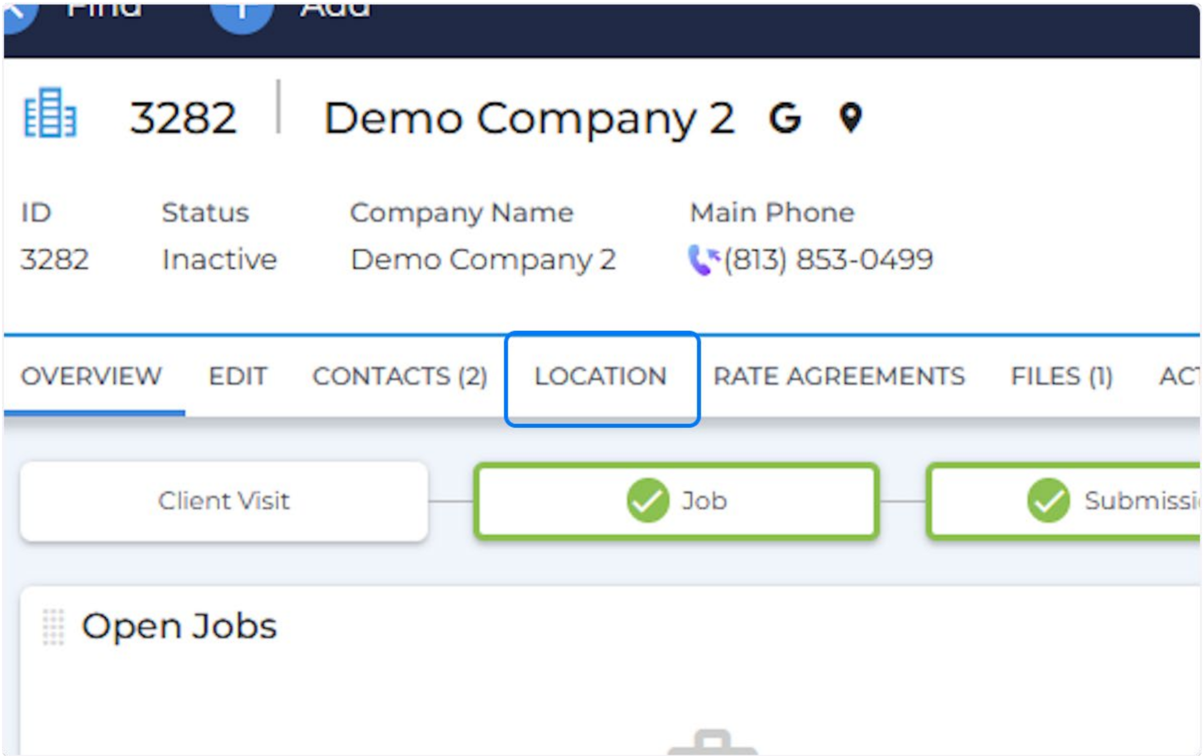
17. Click SAVE to complete the initial company setup.



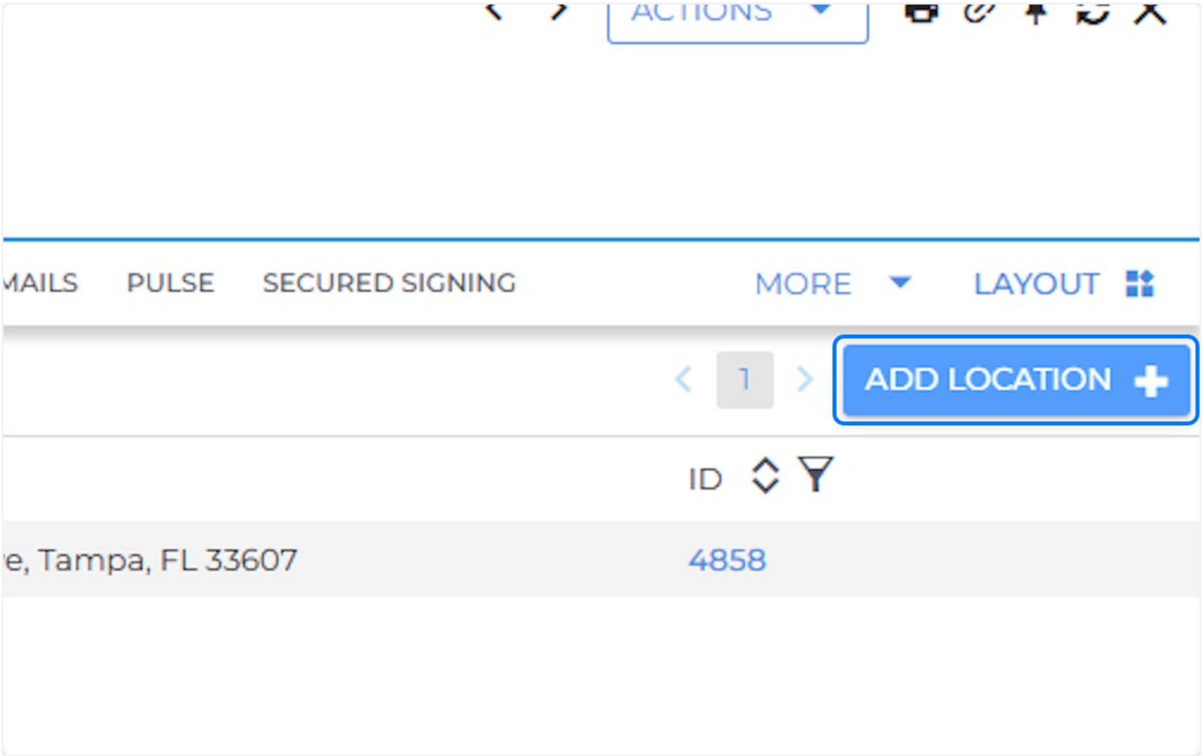
Creating a Location Record

Creating a location record is required prior to creating a job order or setting up a billing profile. This should be the next step after creating the company record initially. The corporate address on the Edit tab of a company record does not have any operation use in Bullhorn and is just for viewing purposes.

1. On the company record, click on the LOCATION tab.

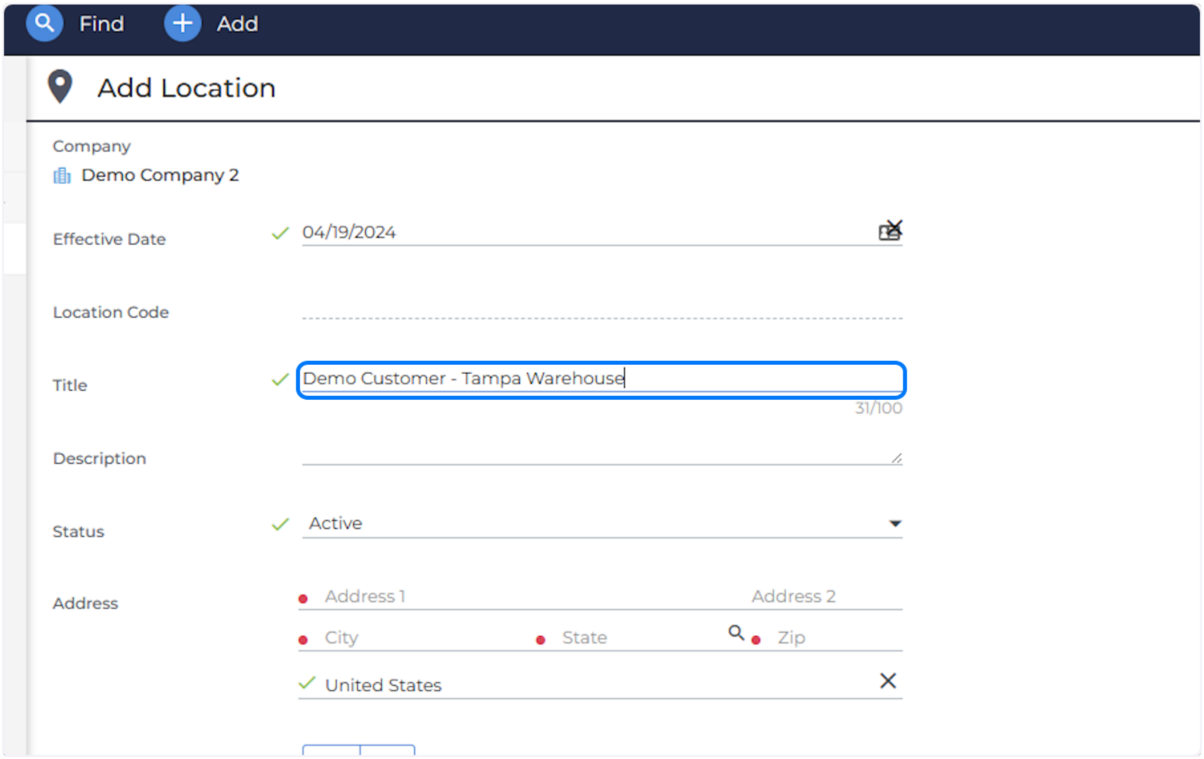


2. Click on ADD LOCATION.

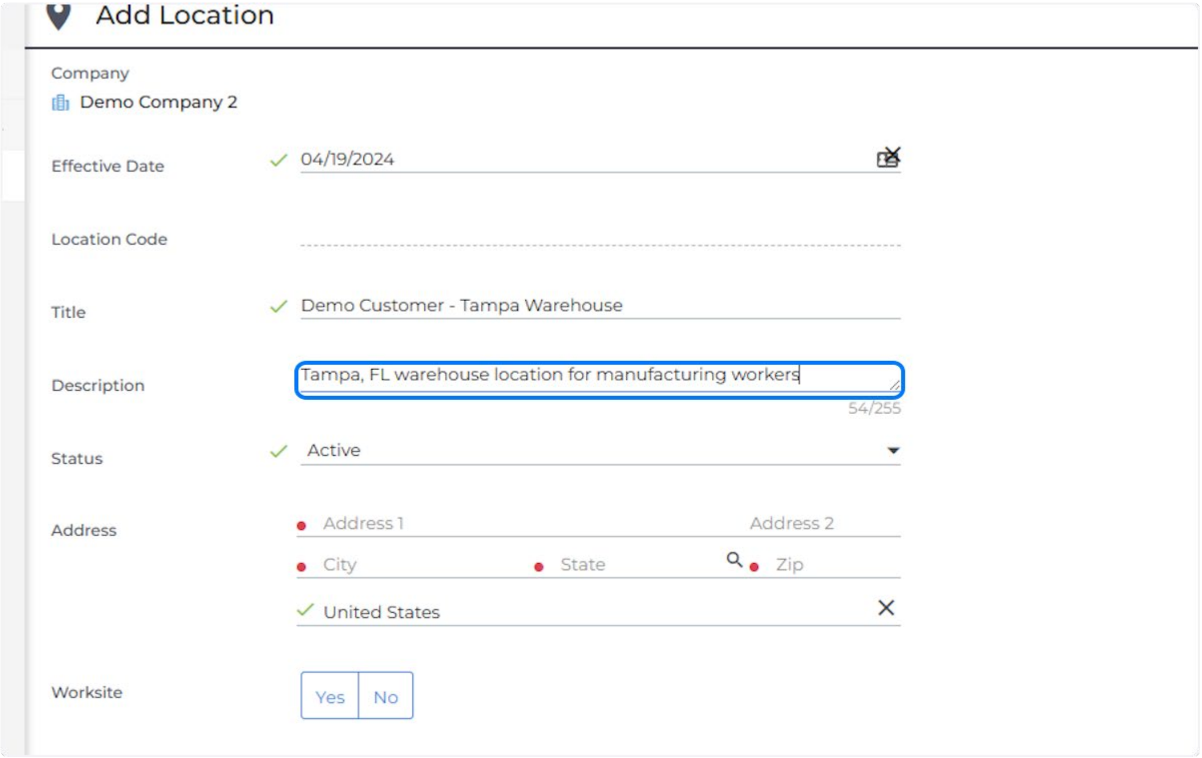


3. Enter a location title.

Note: It's best practice to add company name first, then hyphenate with a describing location such as "Corporate" or "City Warehouse" etc.

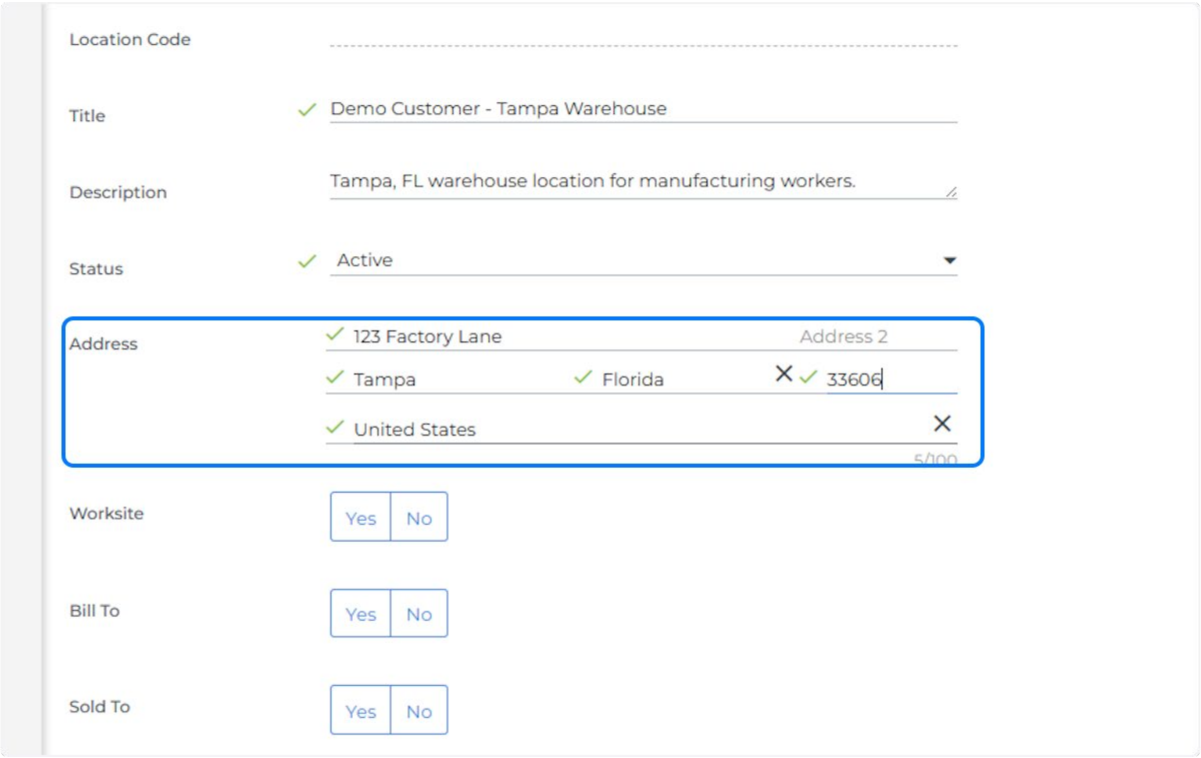


4. Enter a location description for team awareness/reference.



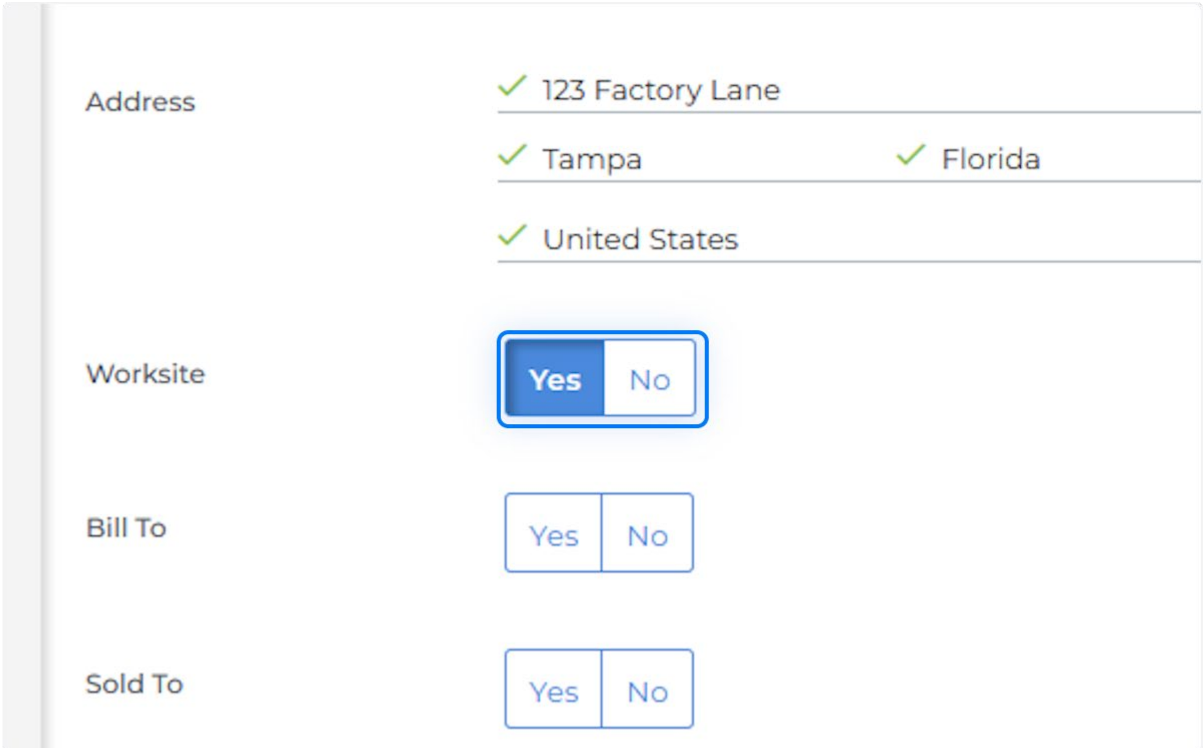
5. Enter the full address information in without abbreviations.

Important Note: This must be the full and correct address without abbreviations otherwise the geocoding process can fail for payroll.



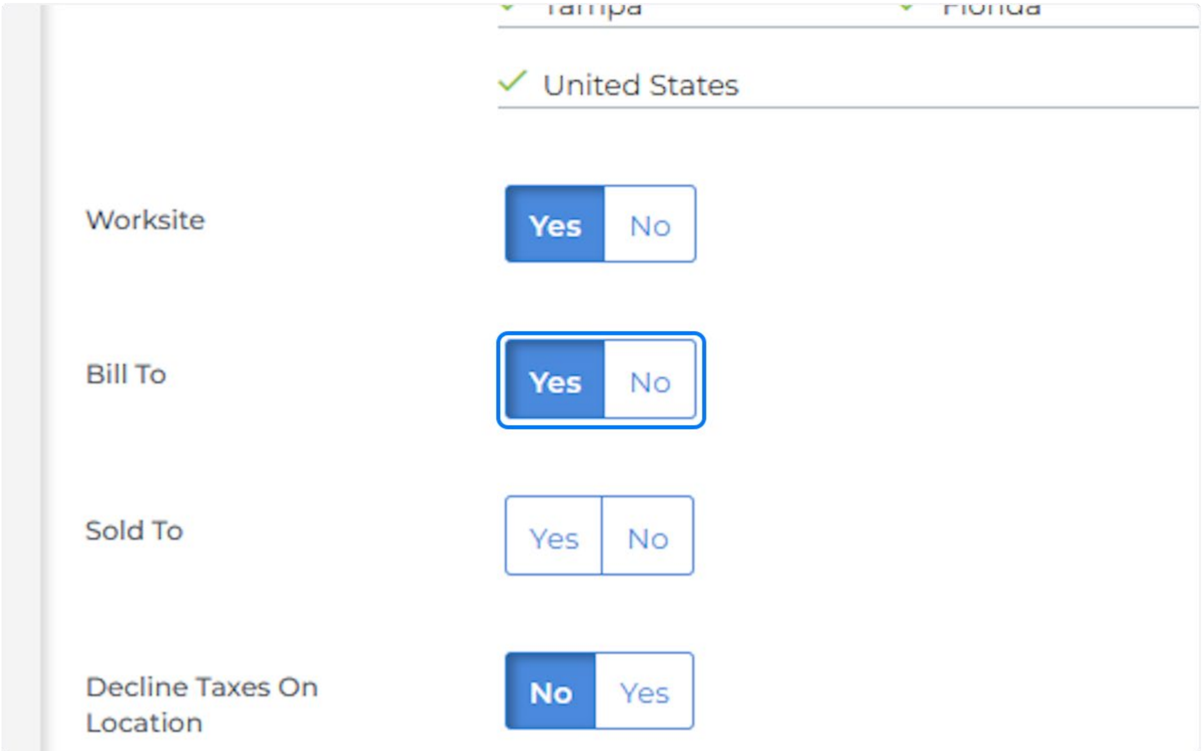
6. Select whether the location entered is a worksite address or not.

Note: If "No" is selected for Worksite, then this address will not populate as an available location when creating a job order.

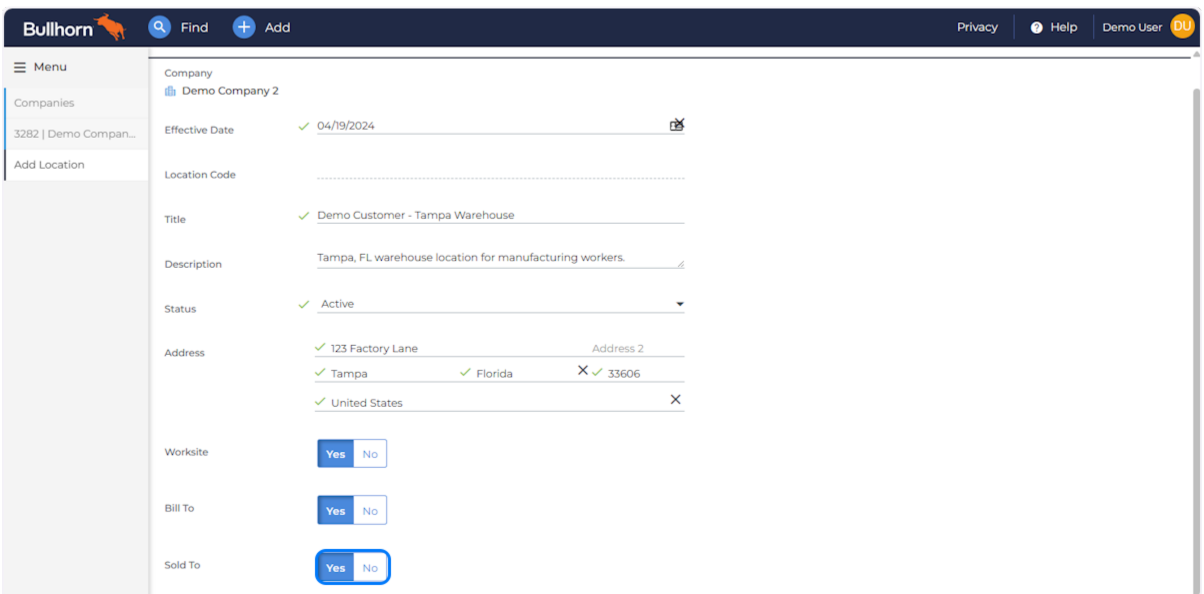


7. Select whether this location is also a location that will have invoices sent to them.

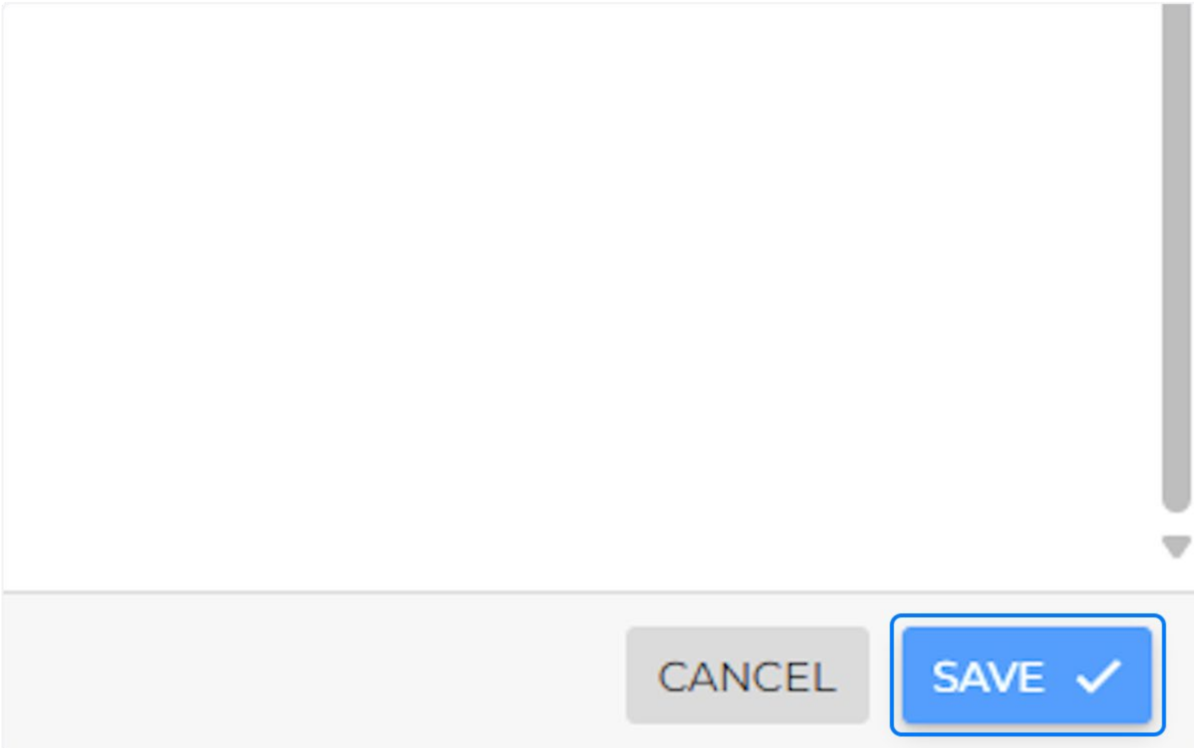
Note: A location can be a worksite and billing location. However, if it is a satellite location, that is strictly a worksite only and billing is sent to the corporate office, then this should be marked as "No" to avoid confusion.



8. Optional: Mark whether or not this location was a location where the sales process occurred and was closed.



9. Click on SAVE



The location will now be created. If you need to update the address in the future, follow the step below.

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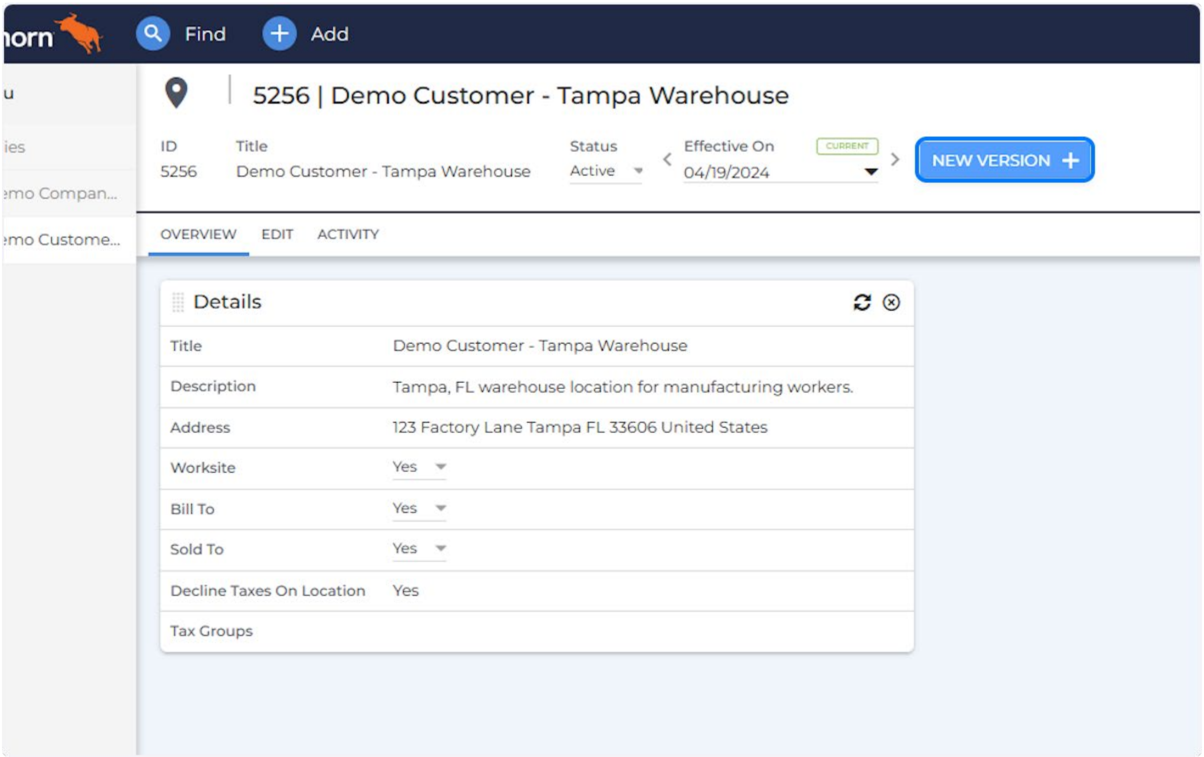
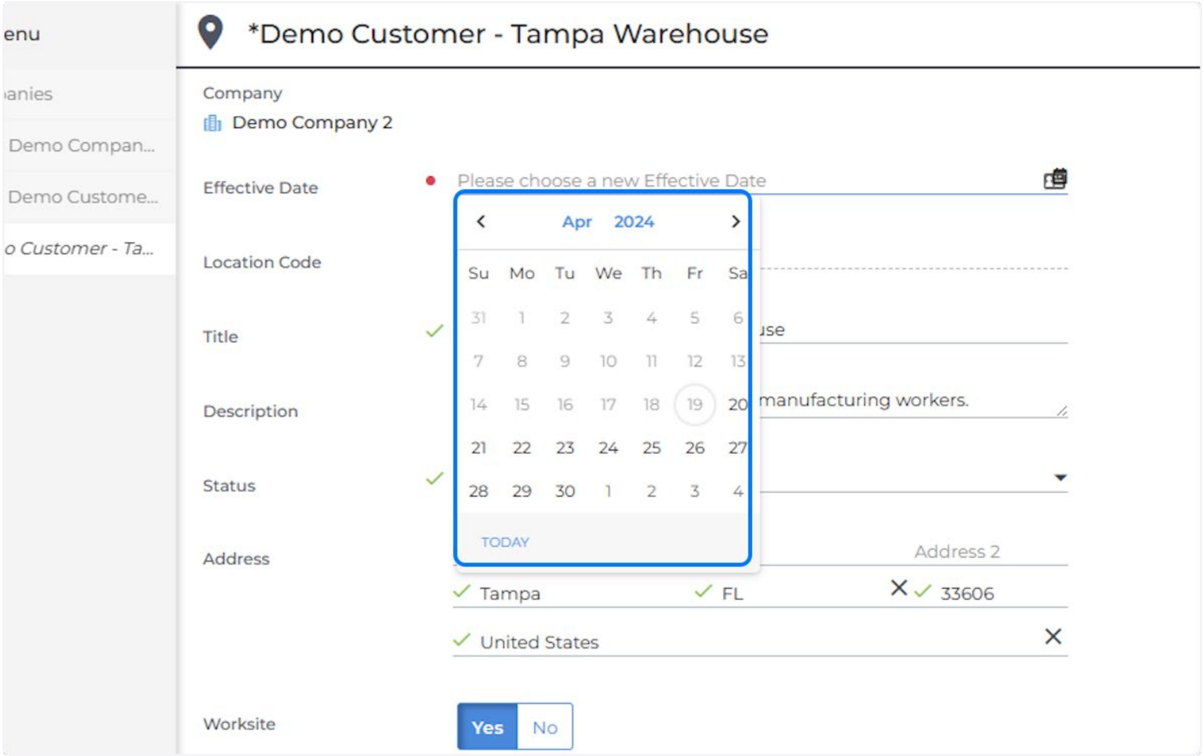
10. Click on NEW VERSION +.

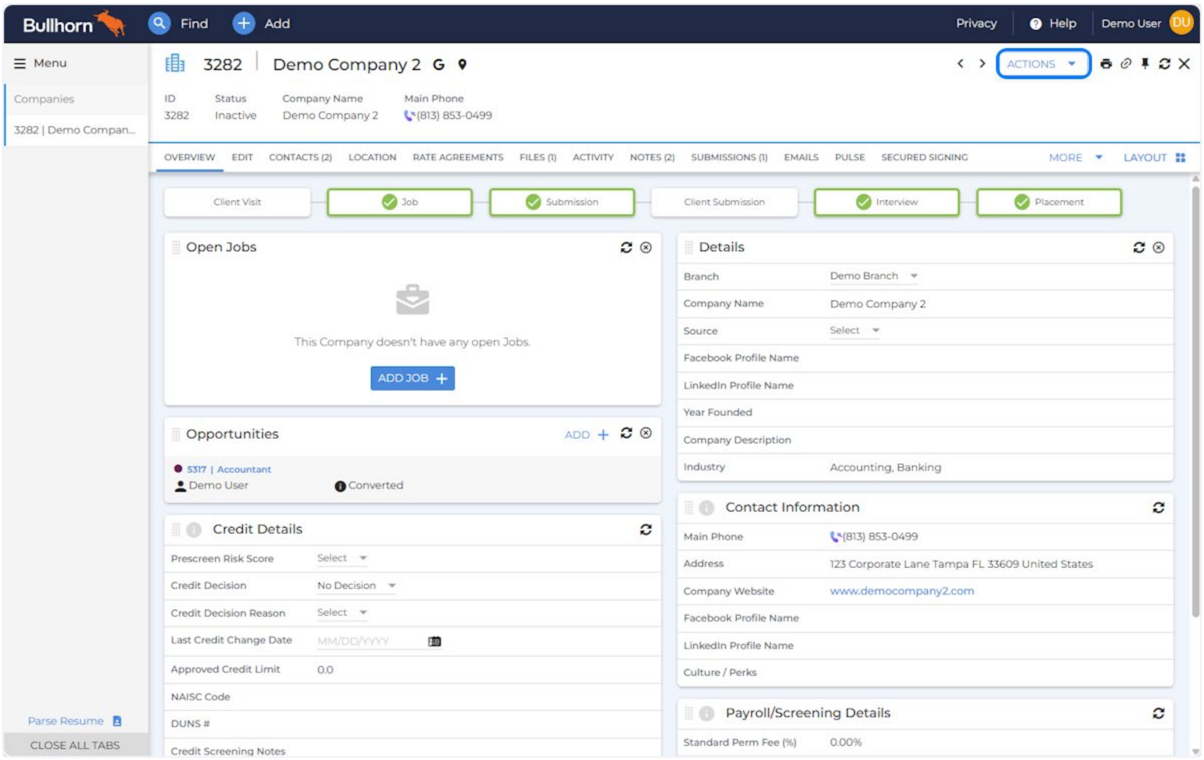


11. Click on Please choose a new Effective Date and select the effective date when the changes should go into effect.

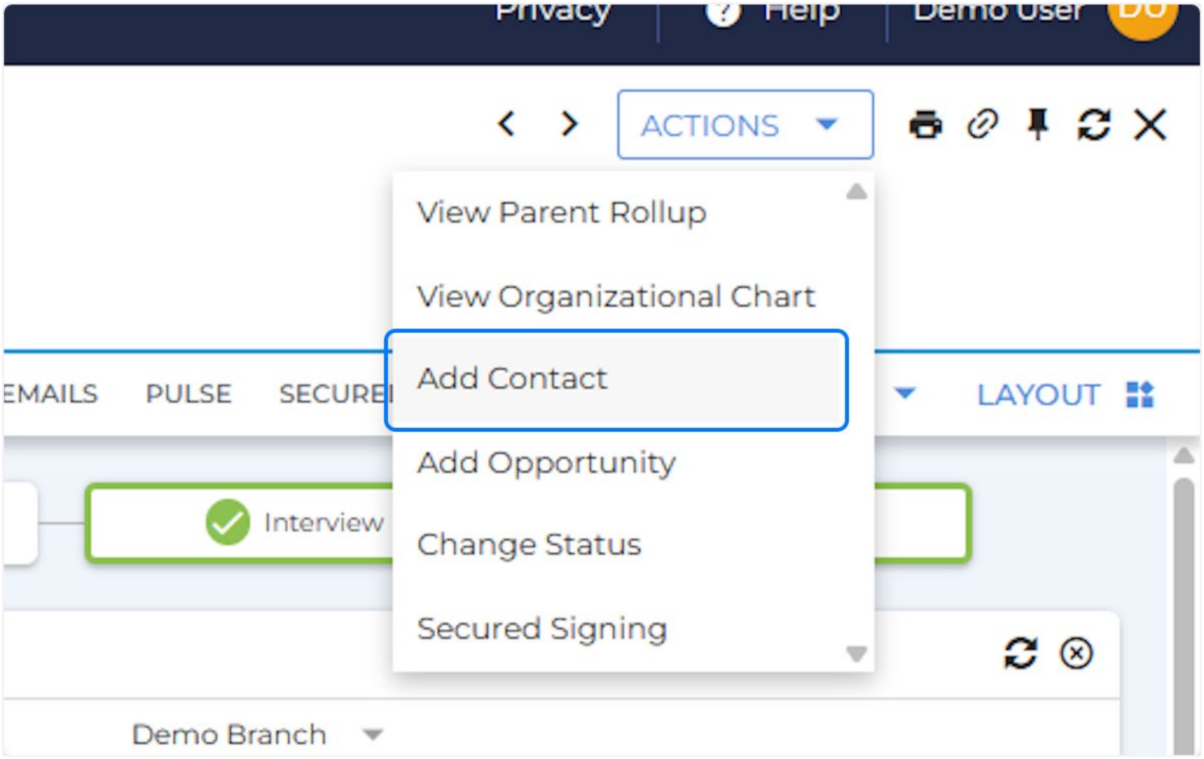


Creating a Contact Record

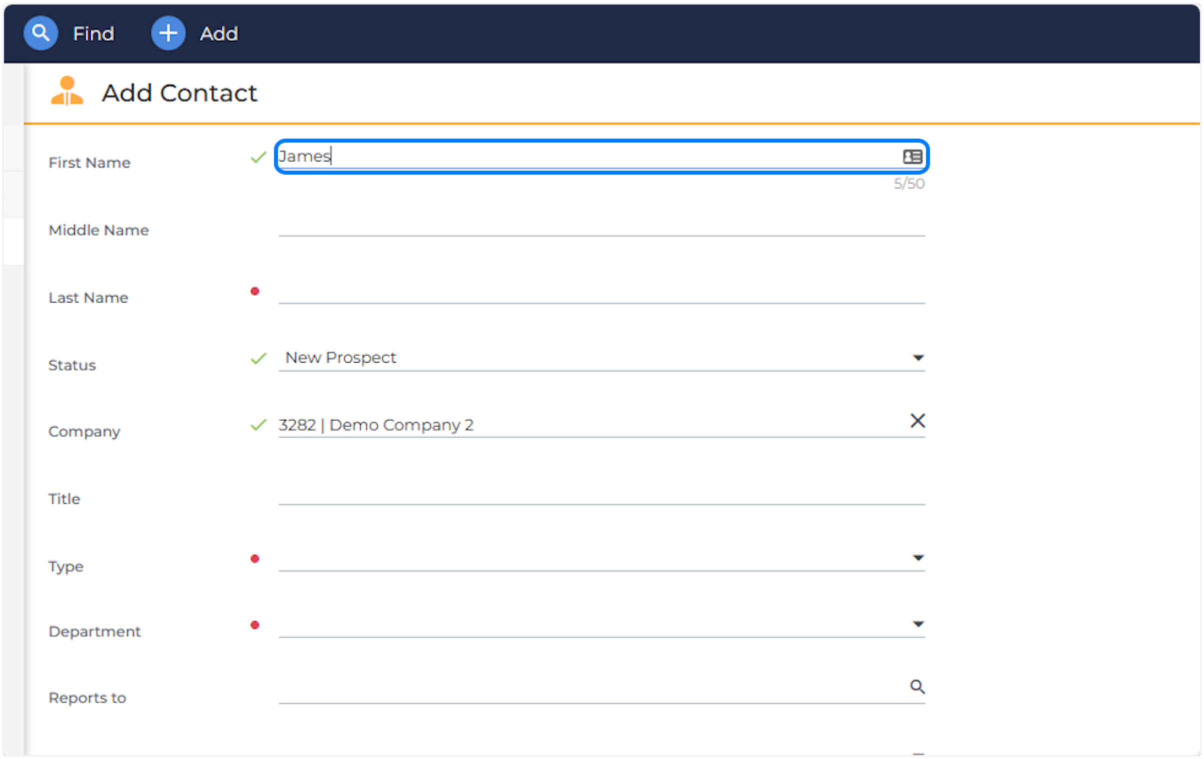
1. From the company record, click on ACTIONS.



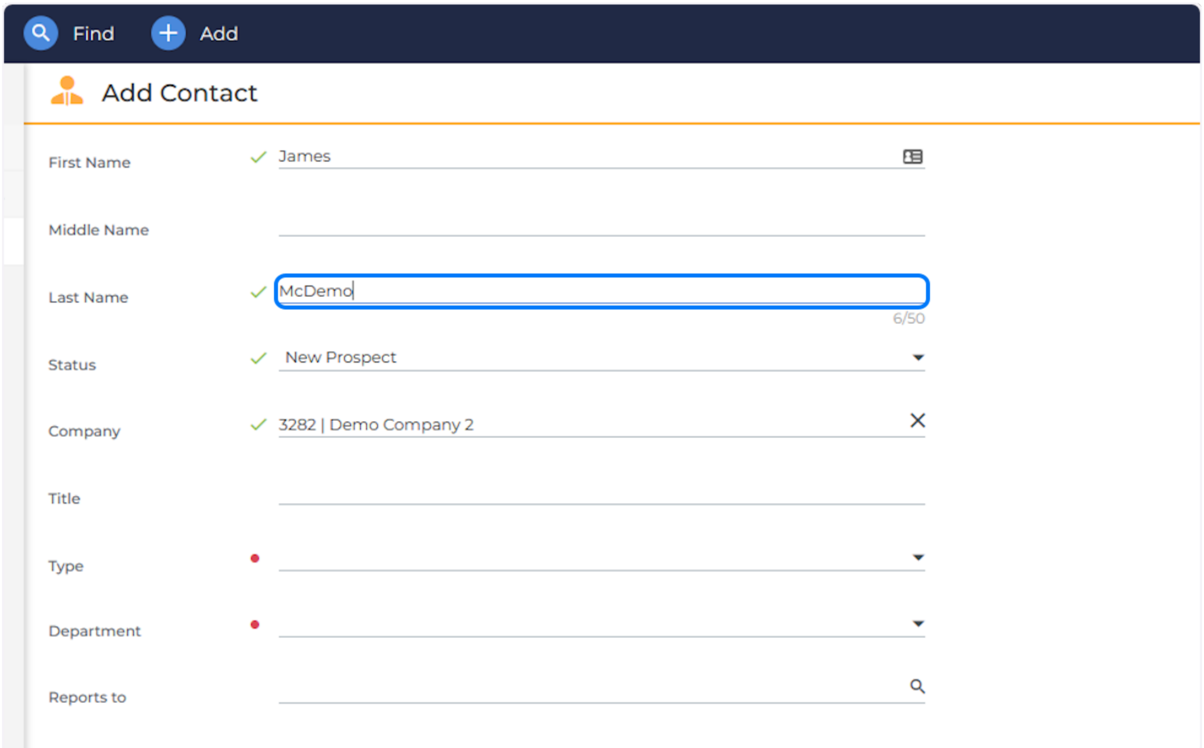
2. From the dropdown, click on Add Contact.



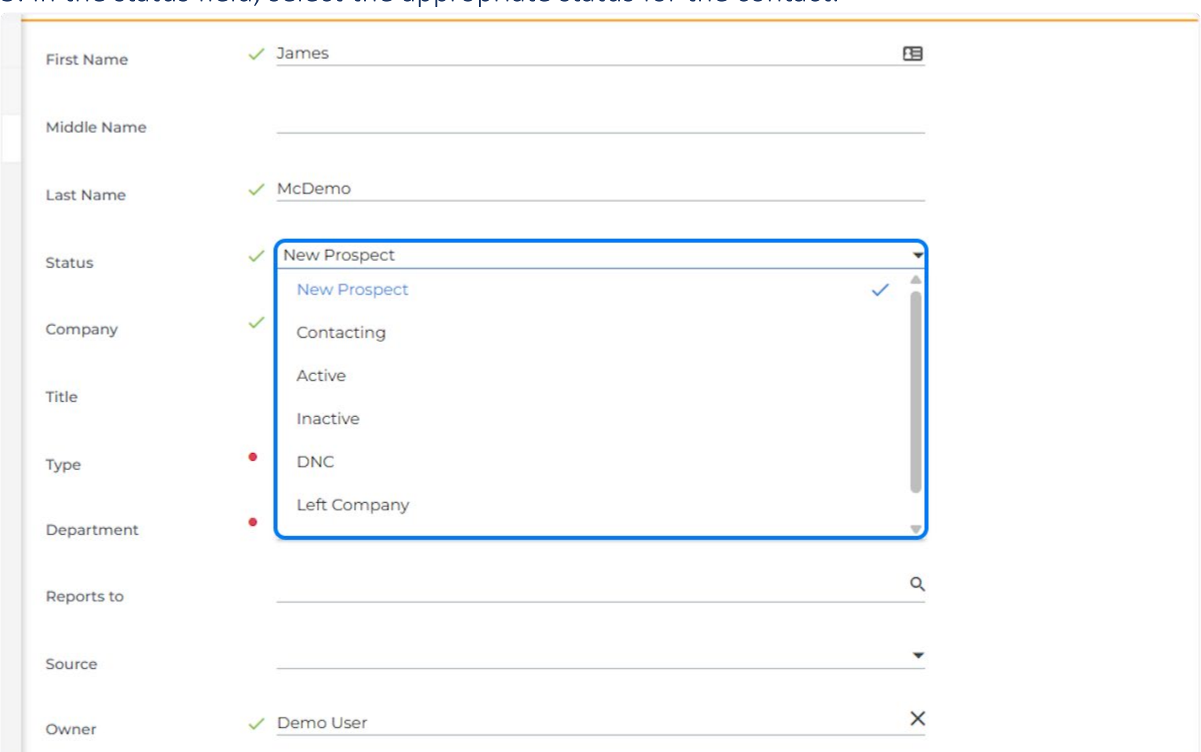
3. Enter the contact's first name.



4. Enter the contact's last name.

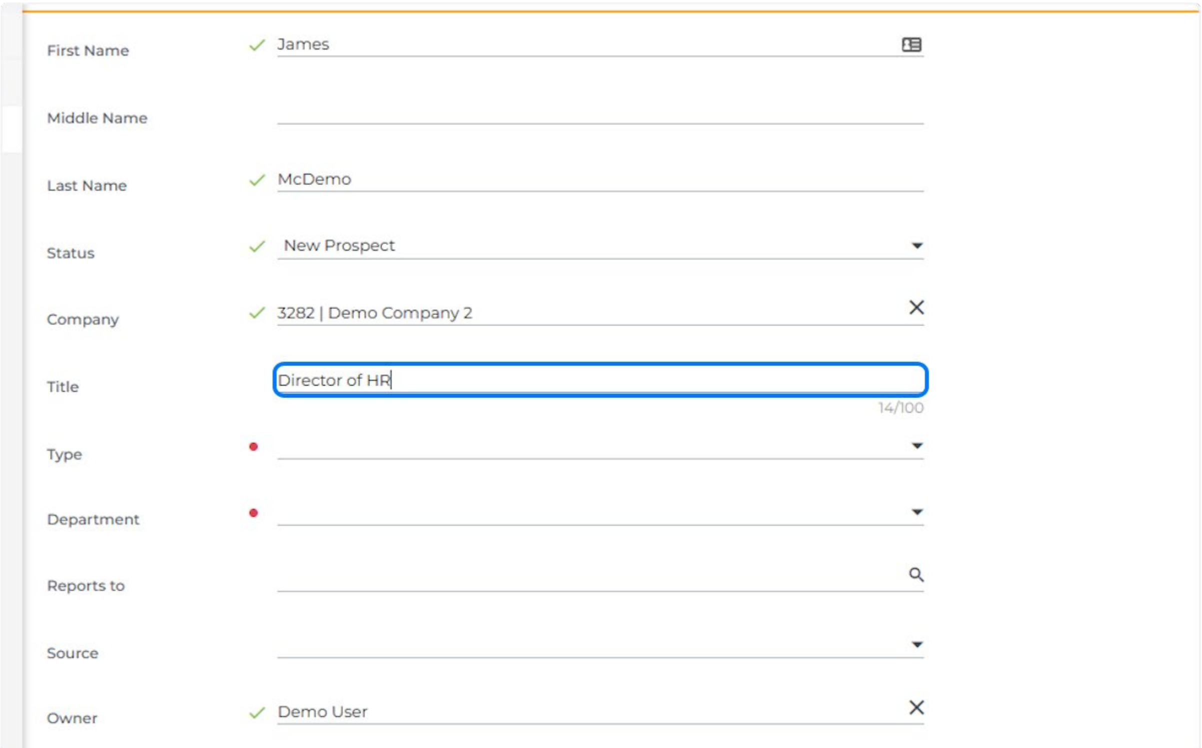


5. In the status field, select the appropriate status for the contact.

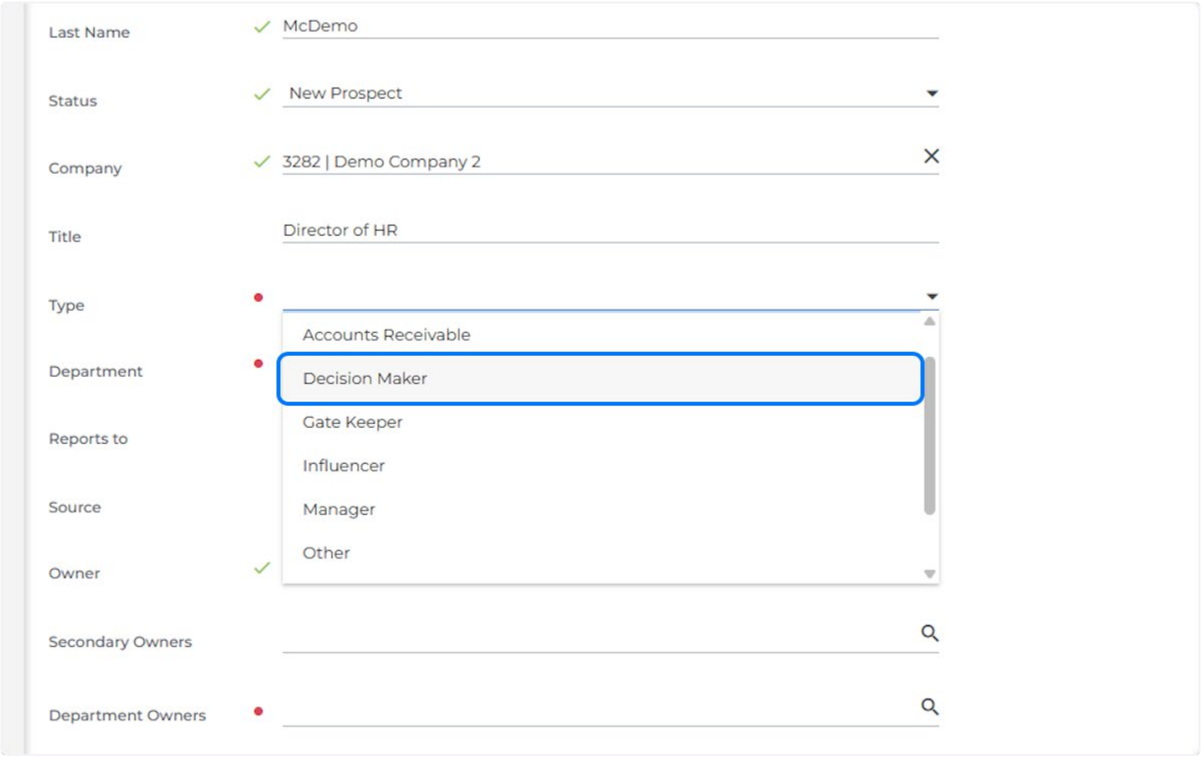


6. Enter a job title for the contact, if known.

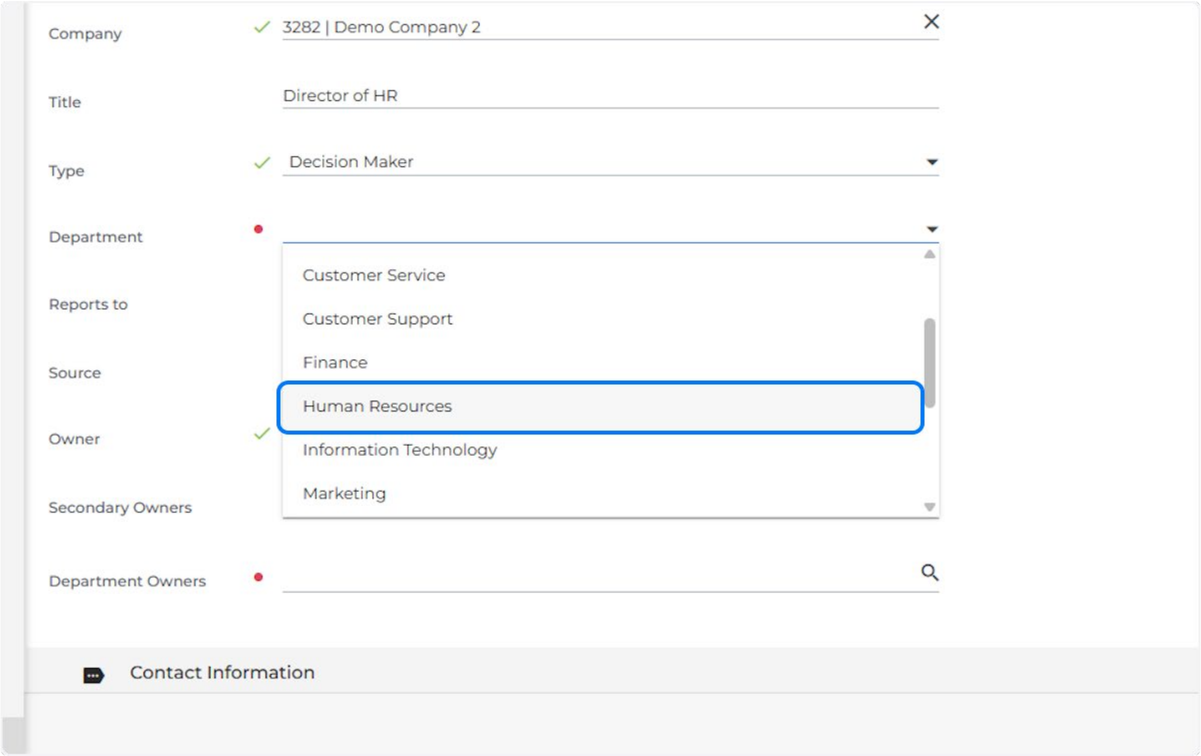
Note: You can always update the fields later.



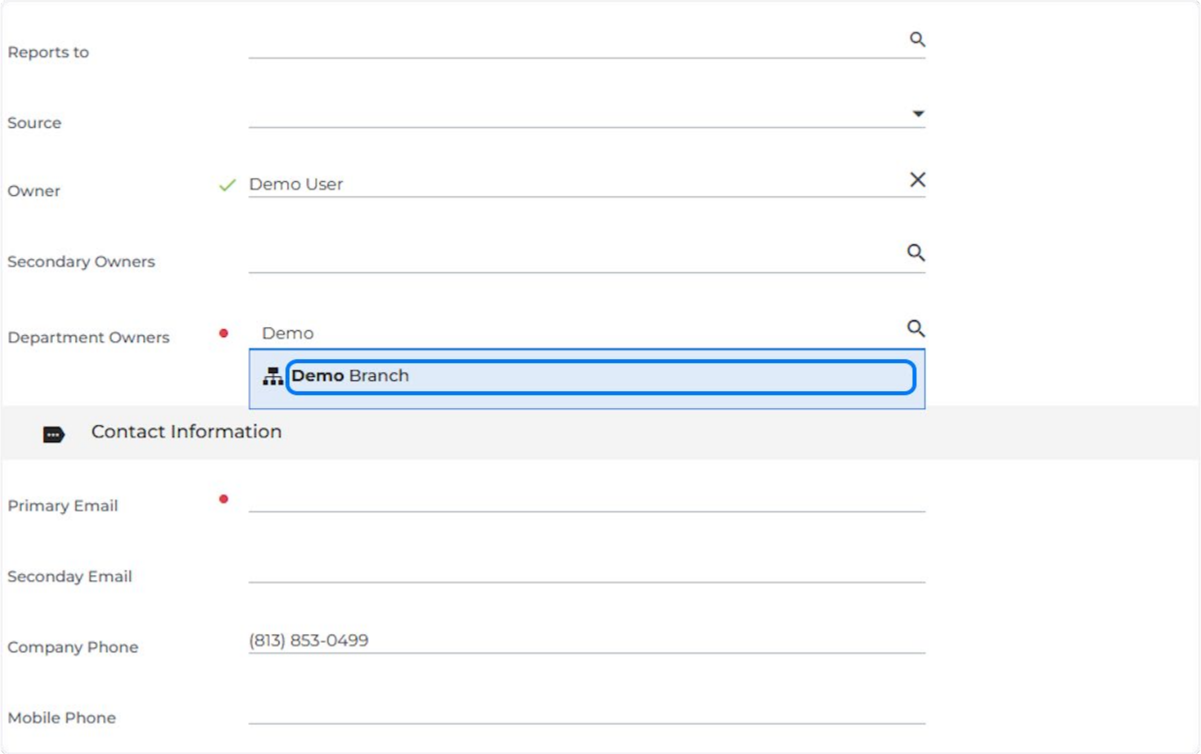
7. Select the dropdown from the Type field and select the contact type that applies.



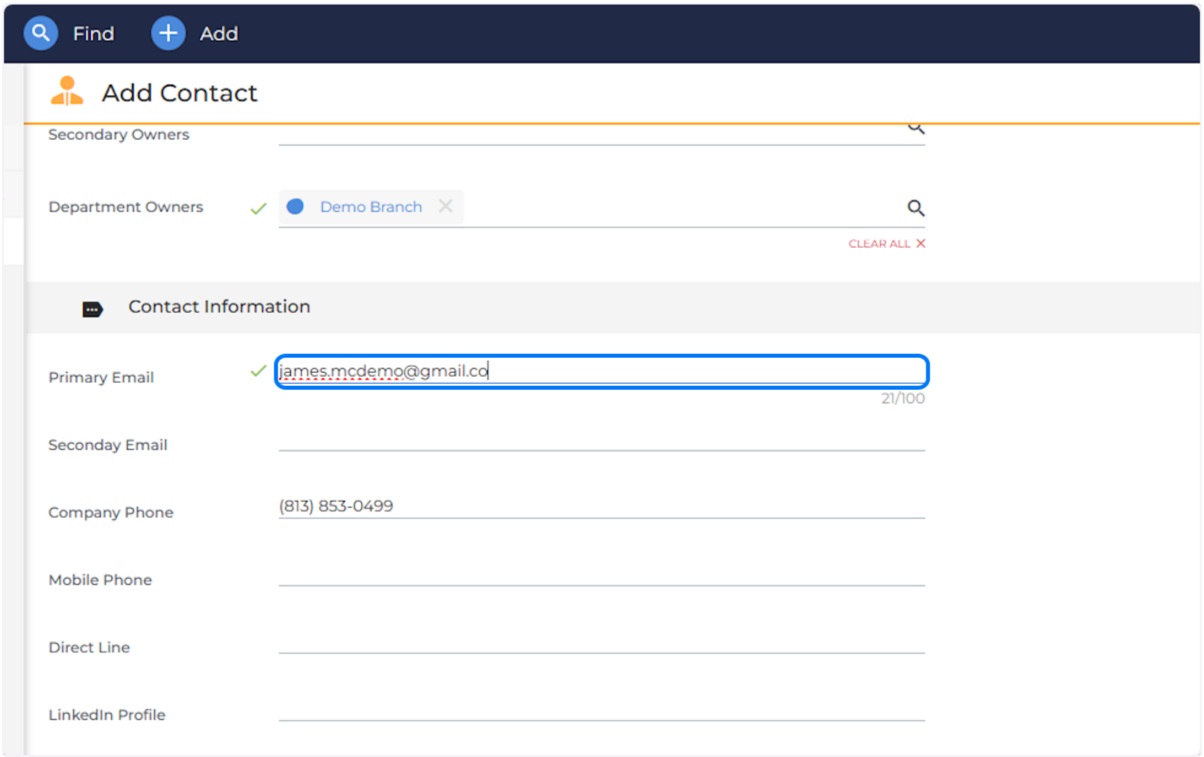
8. Select the dropdown from the Department field and select the department that this contact works in at the company.



9. You can add secondary owner(s) if you wish to share this contact record with specific people, however if you want to share with your entire team, then search for your Department/Branch name and select the option.

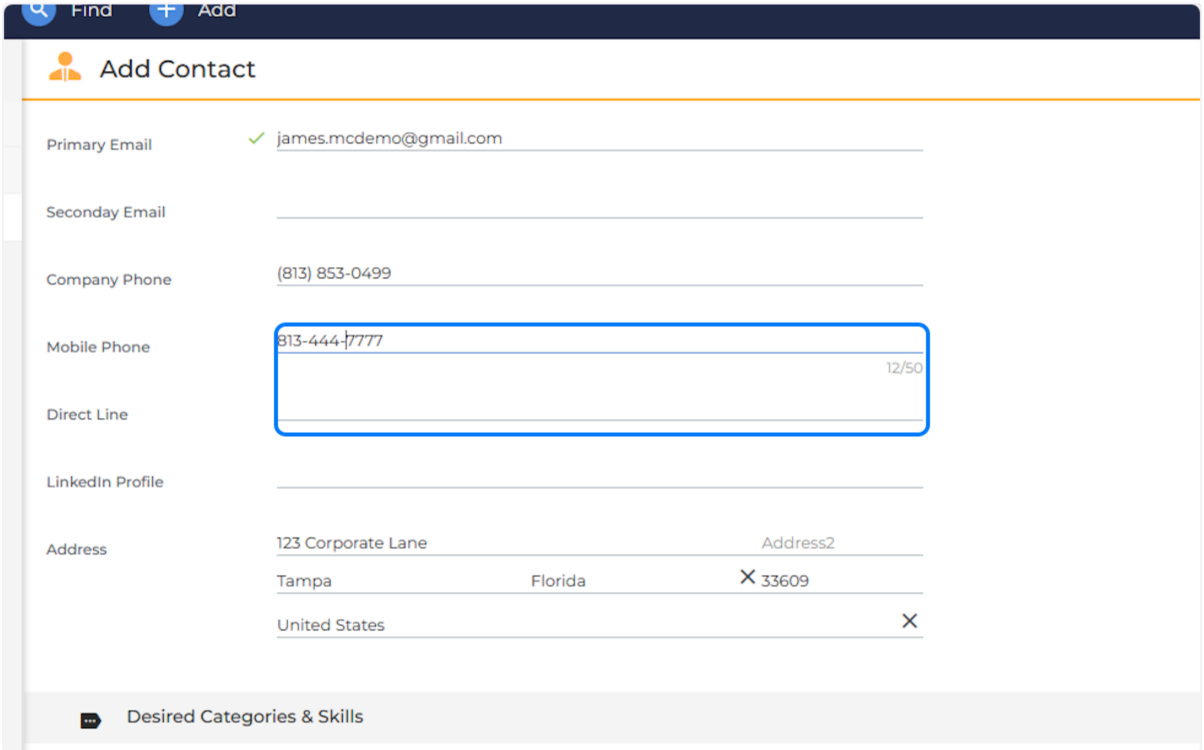


10. Enter the contacts email address.

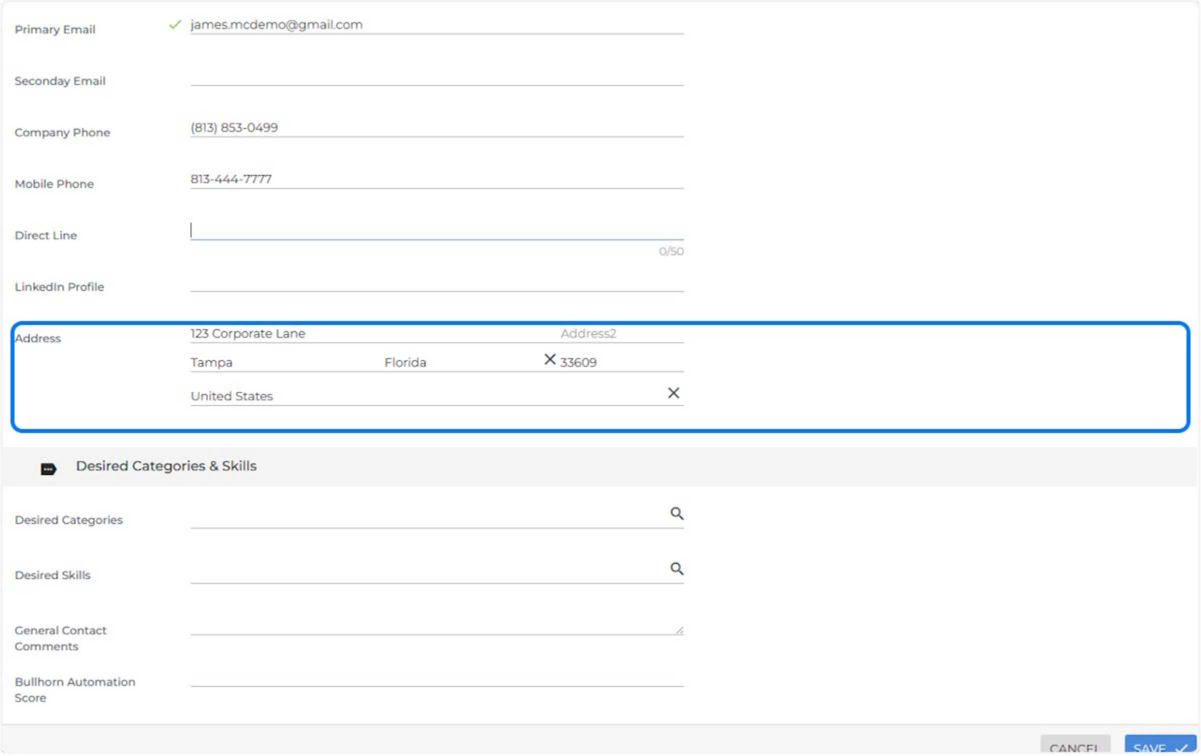


11. By default, the company main number will assign to the "Company Phone" field. You will need to update with the "Mobile Phone" or "Direct Line" field with the contacts phone number used.

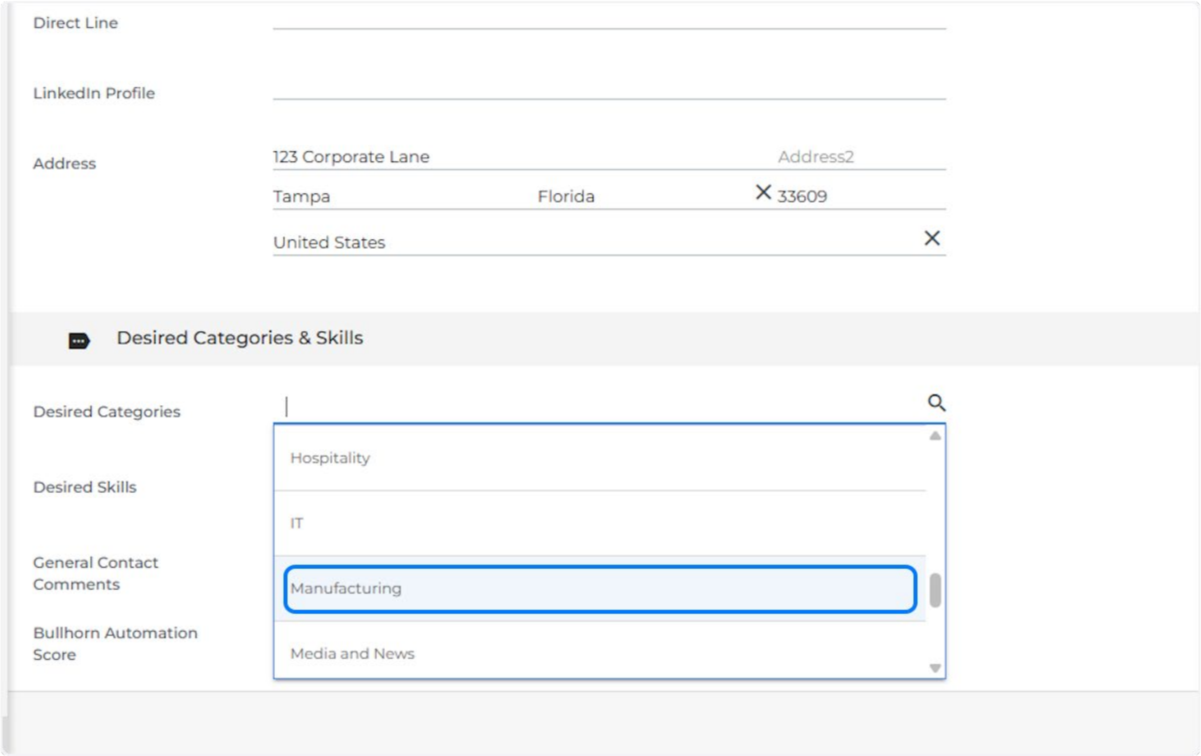
Note: Mobile Phones can be used with the Bullhorn Texting integration.


Find
Add
Add Contact
Primary Email
james.mcdemo@gmail.com
Seconday Email
Company Phone
(813) 853-0499
Mobile Phone
813-444-7777
12/50
Direct Line
LinkedIn Profile
Address
123 Corporate Lane
Address2
Tampa
Florida
33609
United States
Desired Categories & Skills

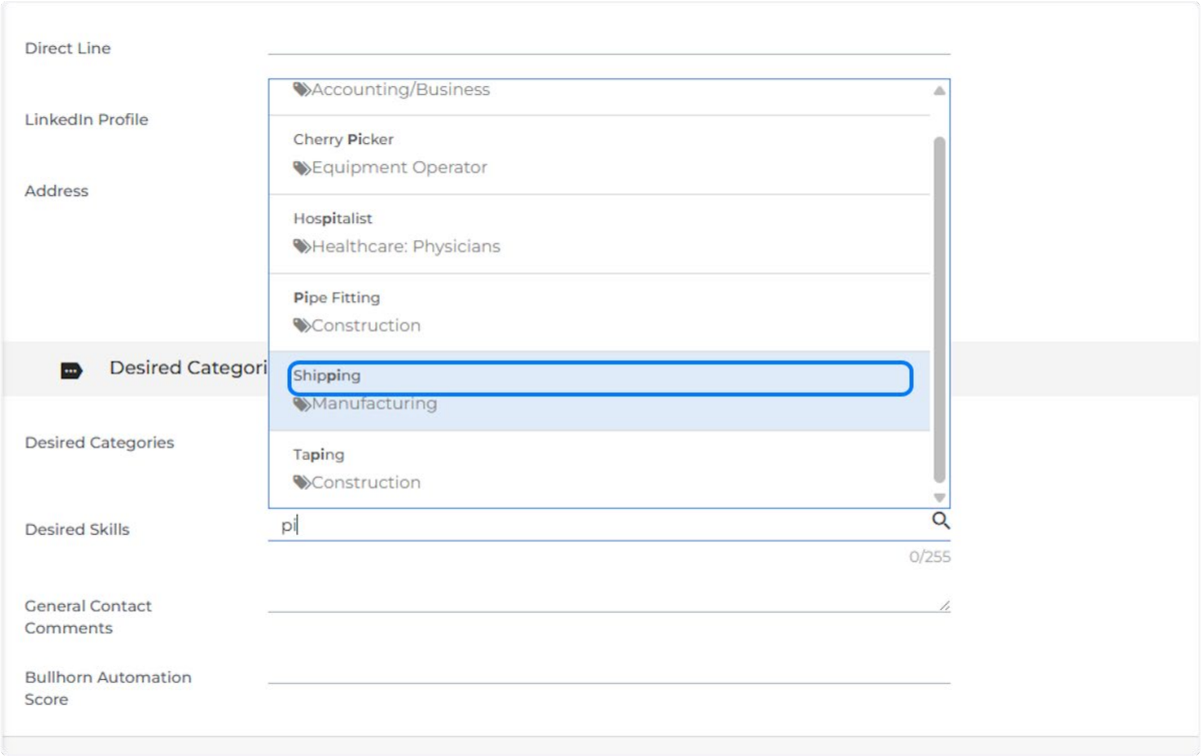
12. By default, the address will carry over from the company corporate address used when creating the company. Make sure to update these fields if they different from the corporate address.



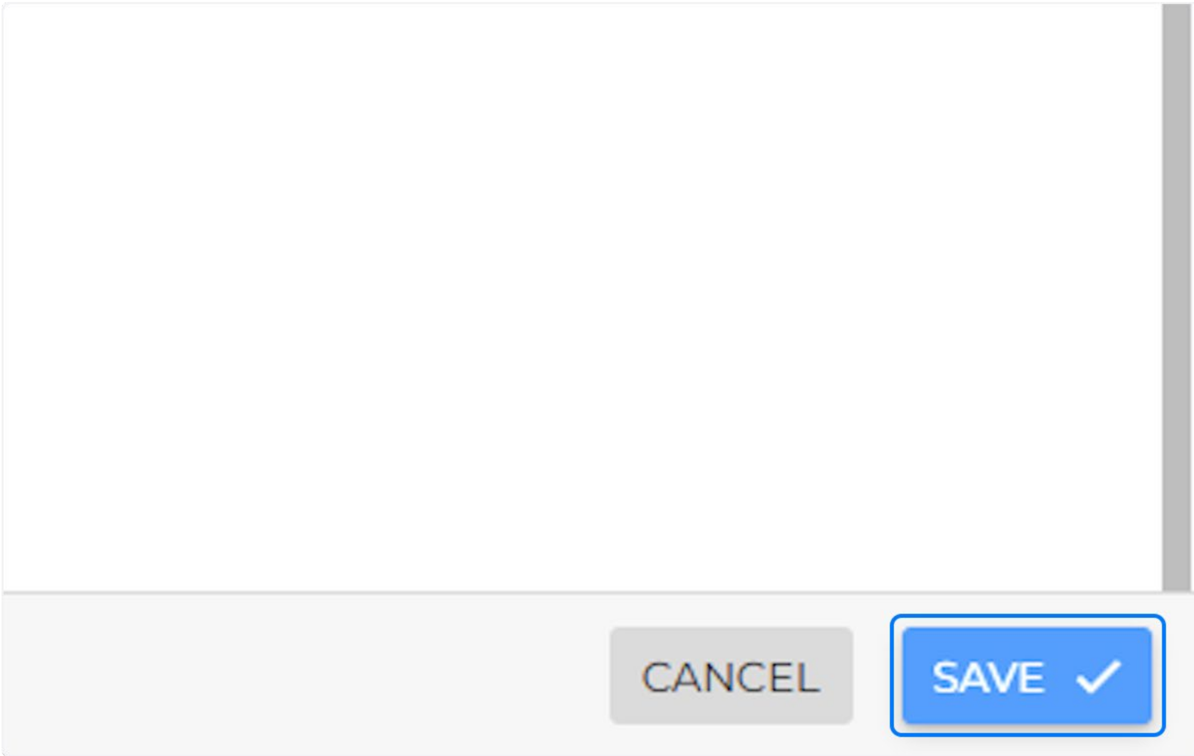
13. Enter any candidate/job categories that may apply to this contact. This can assist with auto-matching candidates.



14. Enter any candidate/job skills that may apply to this contact. This can assist with auto-matching candidates.

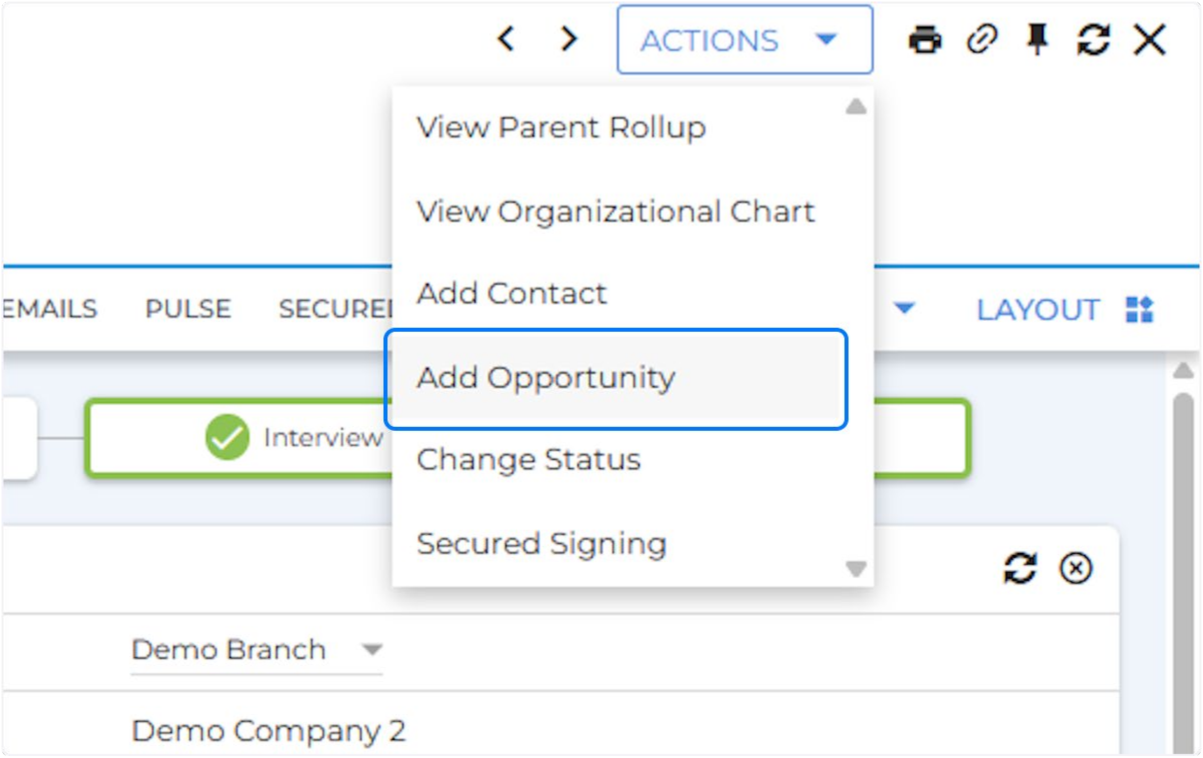


15. Click on SAVE



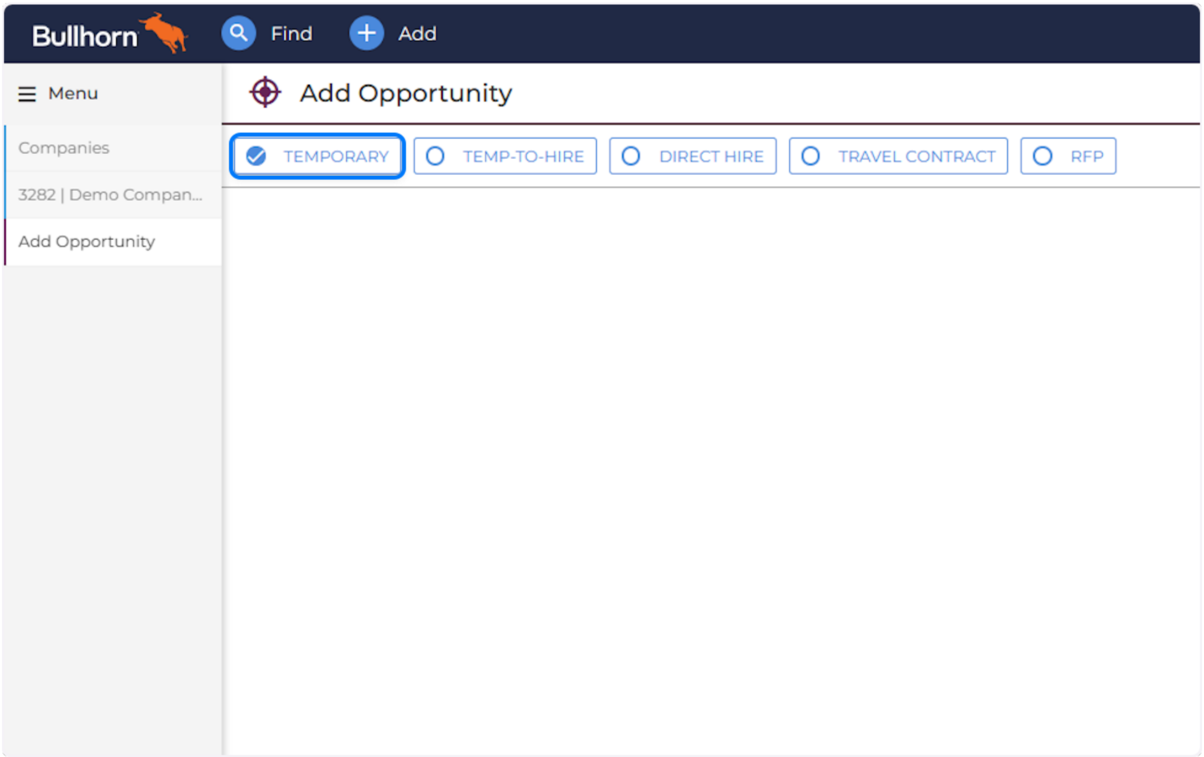
Creating Opportunities for Customers

1. On the customer record, Click on ACTIONS then click on Add Opportunity from the dropdown menu.



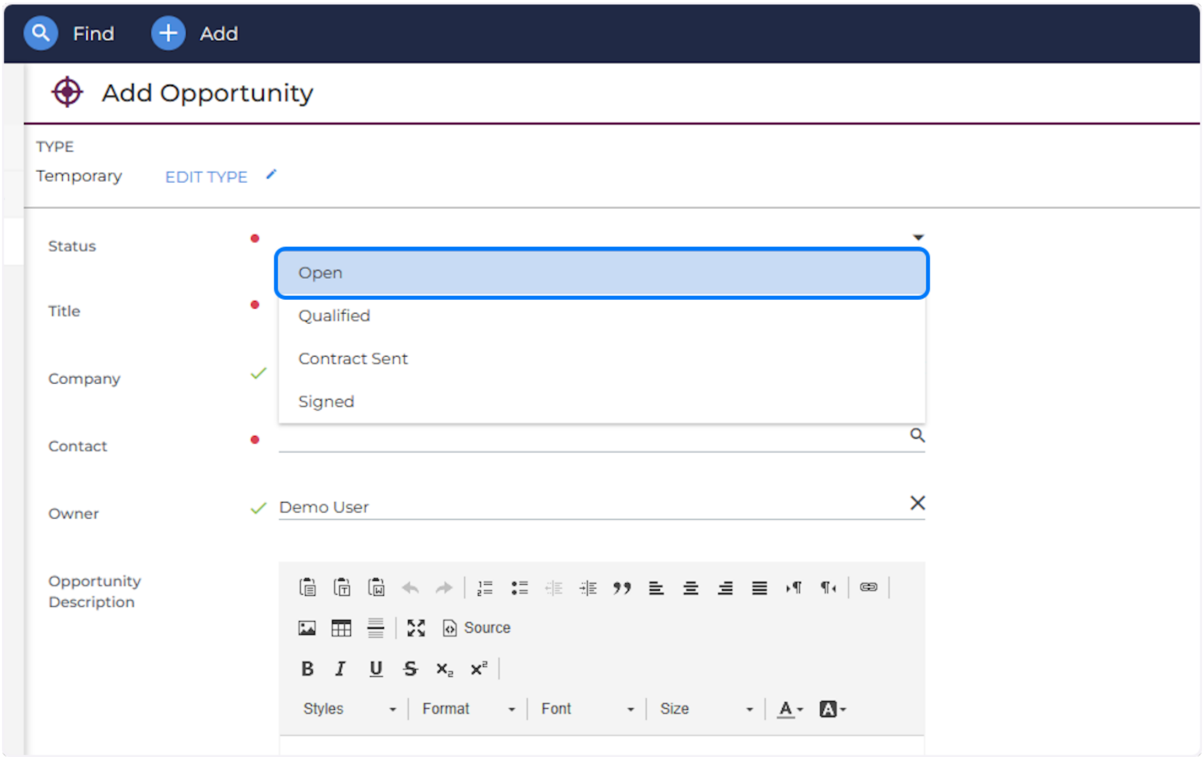
2. Once the opportunity opens up, you will be opted to select a job type from the following option.

Note: If this is a proposal for a large opportunity with multiple jobs and locations, you can use the RFP (Request for Proposal) option.



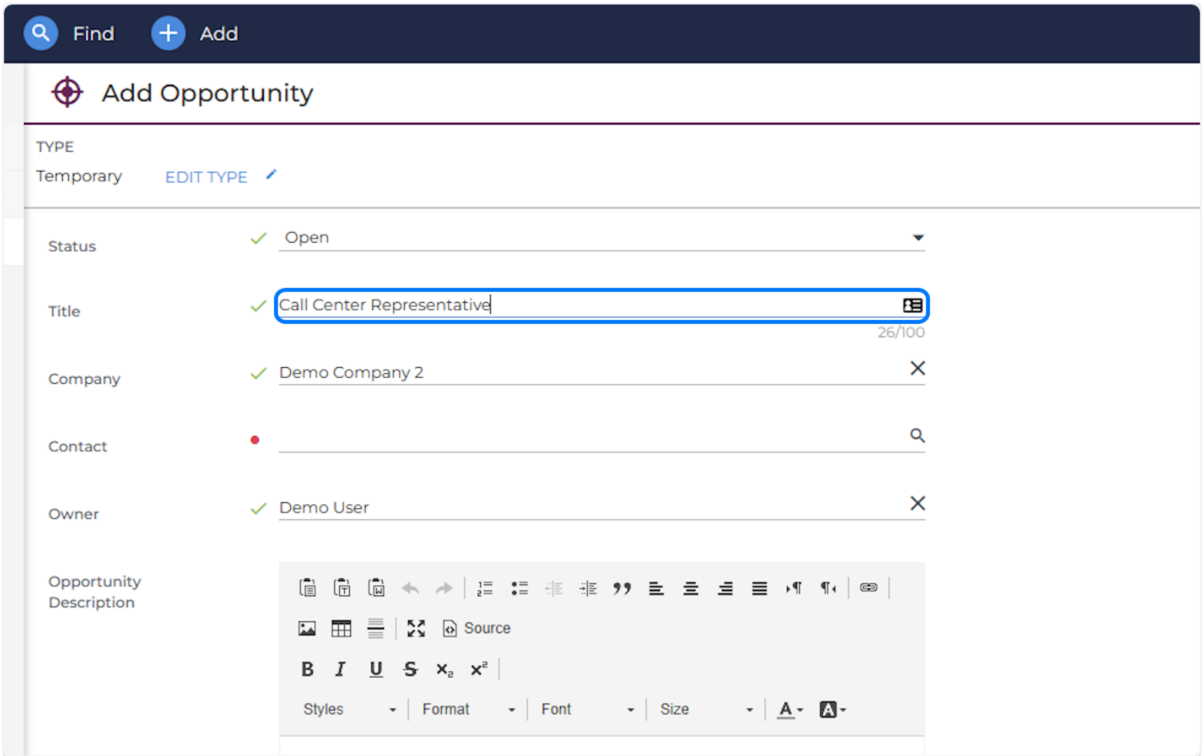
3. Set the opportunity status to "Open".

Note: All opportunities start at Open, unless you are creating one retroactively.



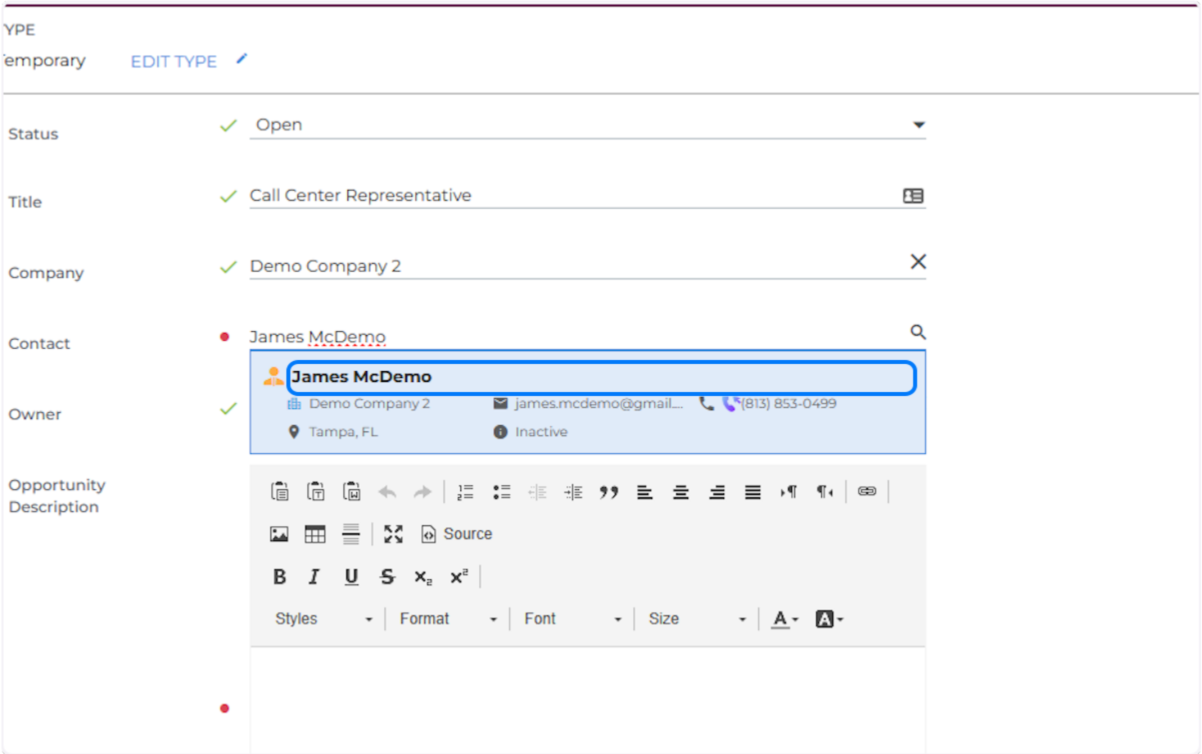
4. Enter the opportunity title. This can either be a job title or a standard title for the opportunity such as a specific department of the business.

Note: Opportunities can be converted to Jobs and will pickup information such as the title and description (as job description).

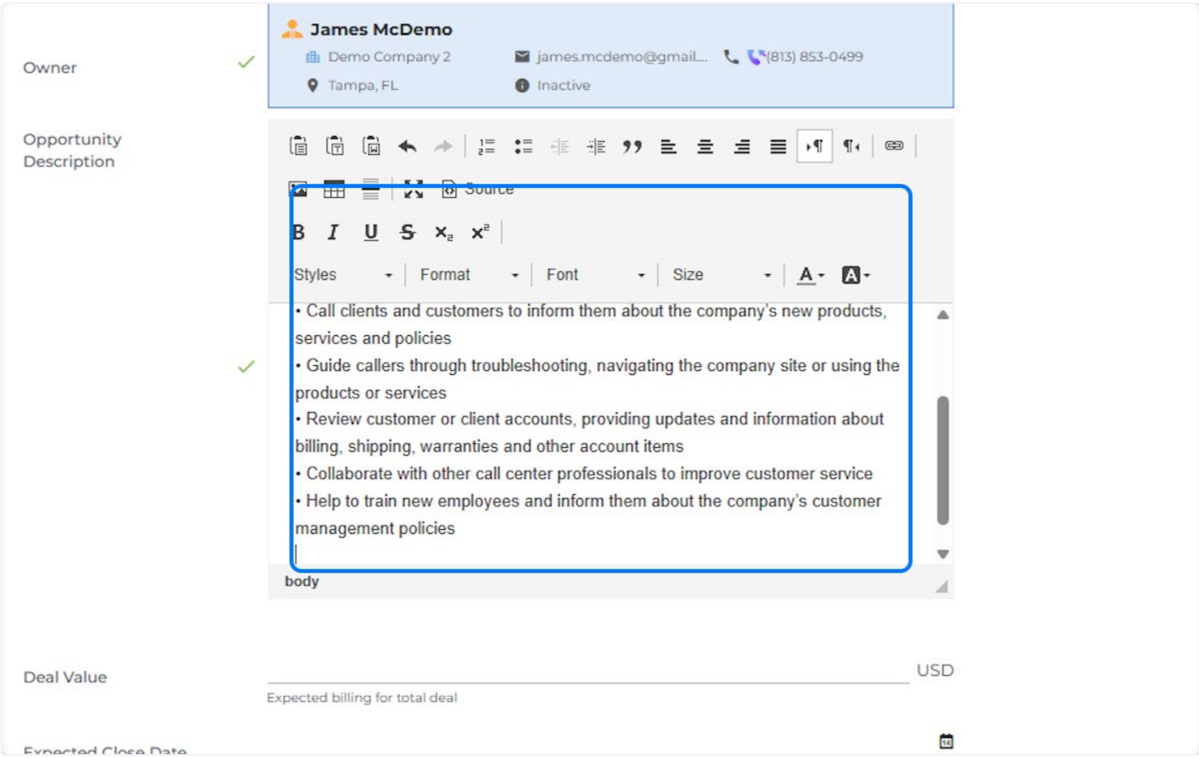


5. Associate a sales contact with the record.

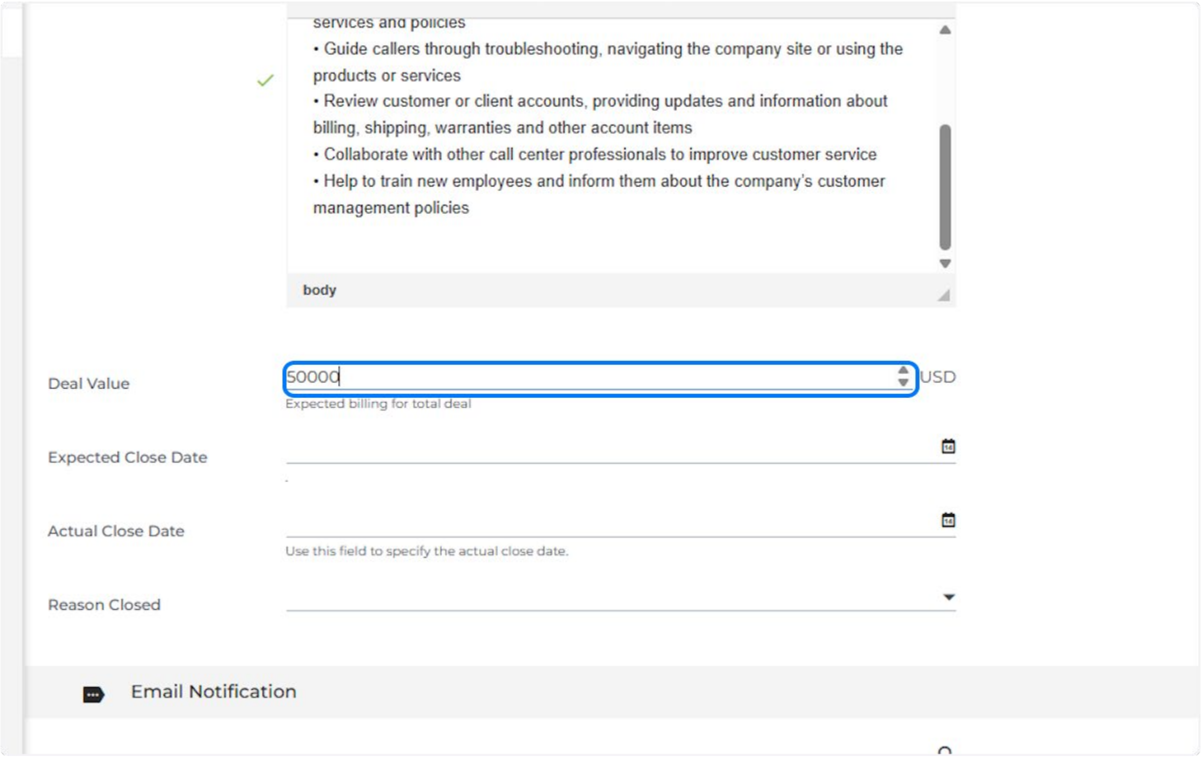
Note: You must search for the first 3 letters of a first and last name for a record to appear in the search bar.



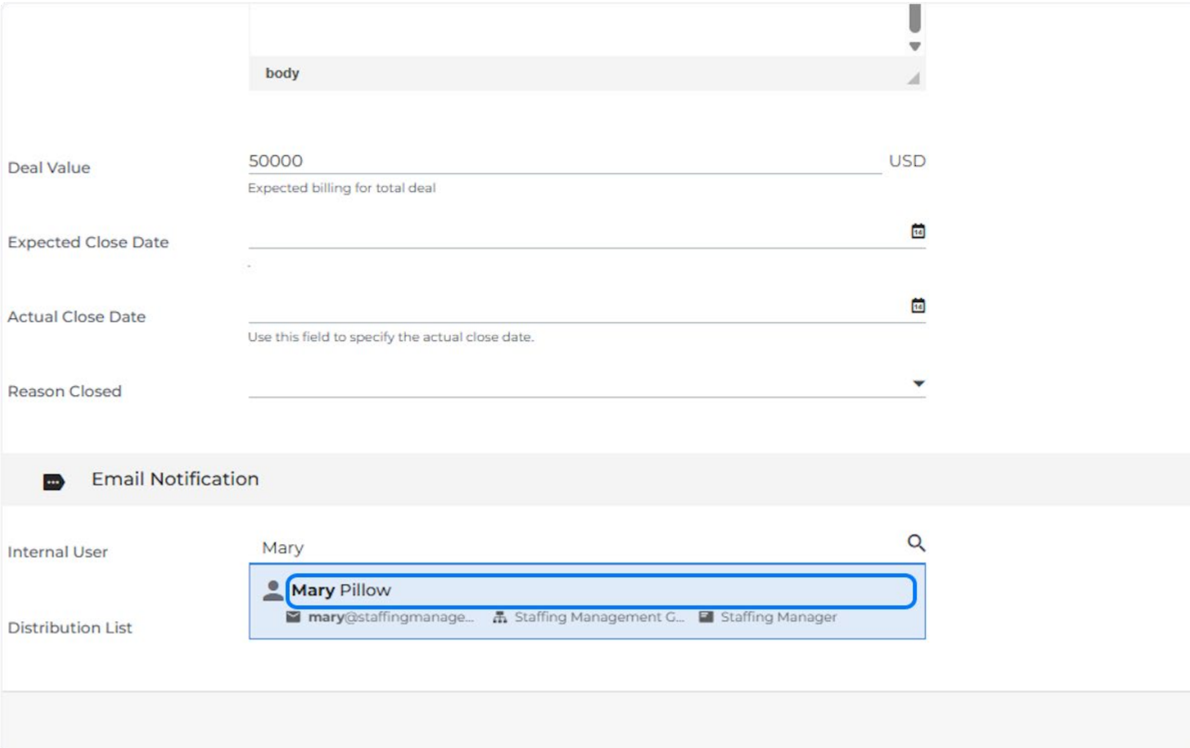
6. Enter a detailed job description for the opportunity. This can be a detailed overview of the opportunity or a job description to use when converting to a job order.



7. Enter the expected billing amount in the Deal Value field.

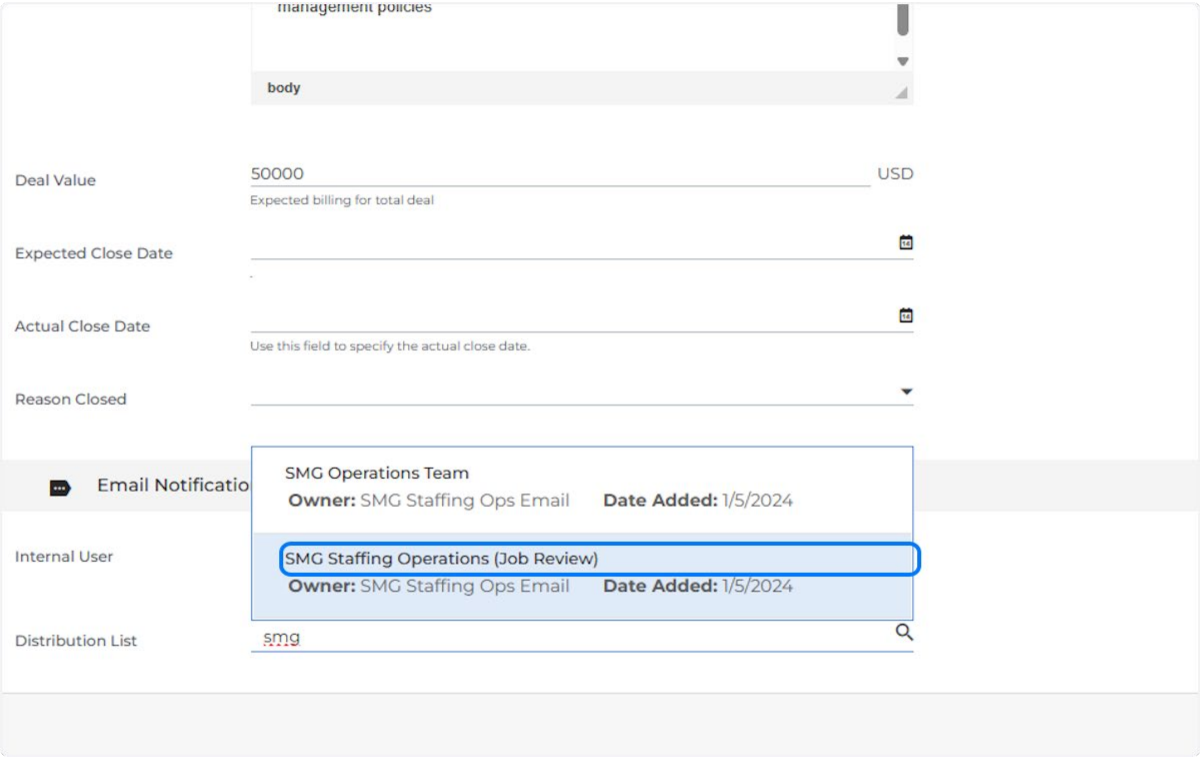


8. Creating an opportunity will not automatically notify an SMG back office team member. Make sure to add your Staffing Manager as the internal user in the Email Notifications section.

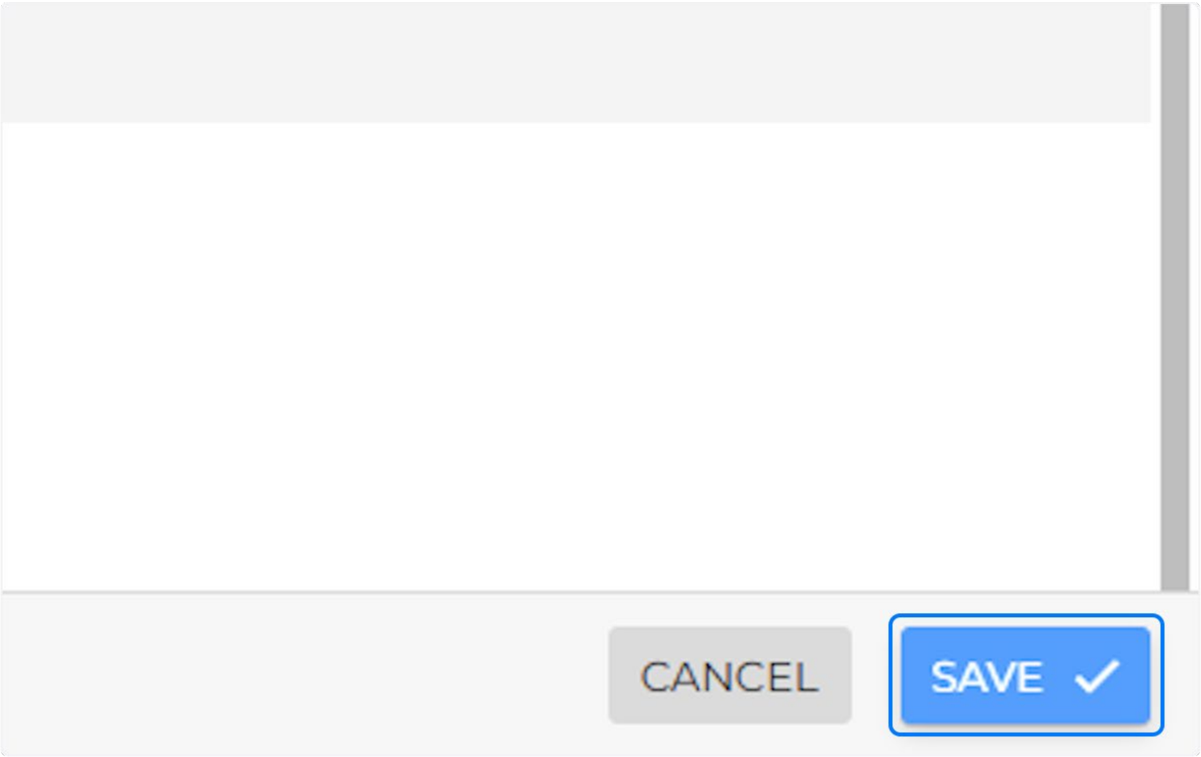


9. Enter and select SMG Staffing Operations (Job Review) for the Distribution List to notify.

Note: This will notify all back office team members. If you create your own distribution list, you can notify others as well, such as your own team.



10. Click on SAVE

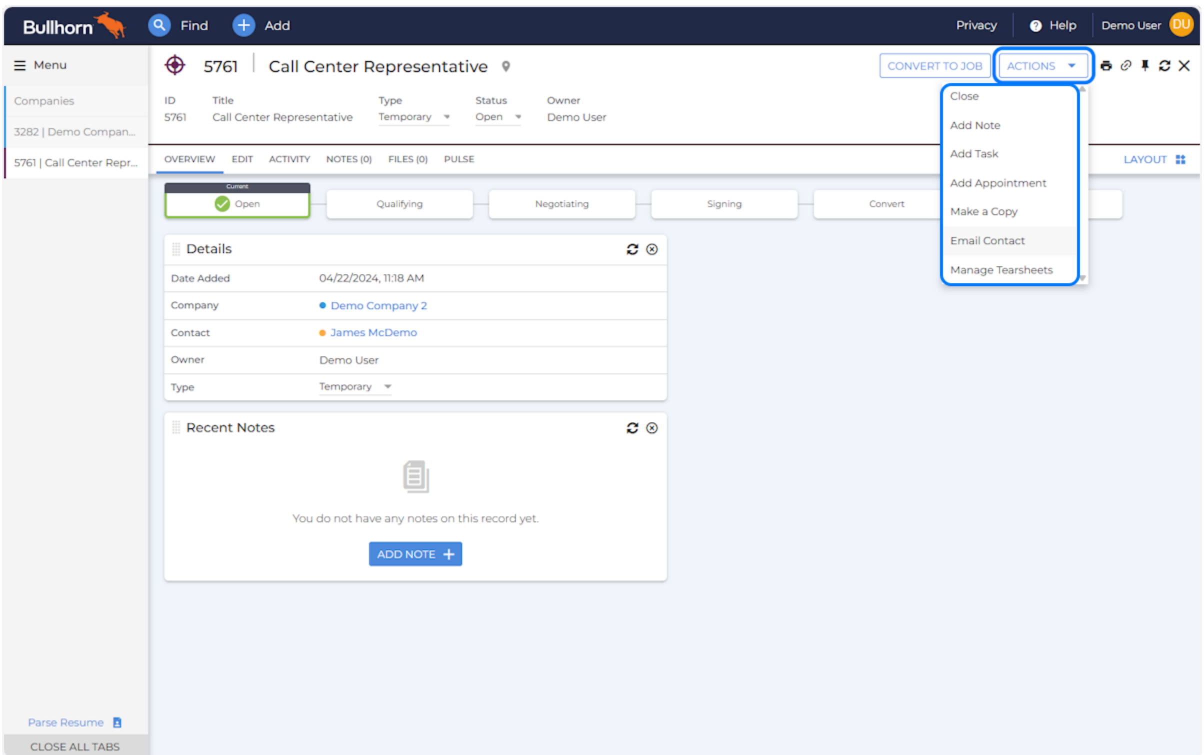


Adding opportunity headcount and job description details.

Once an opportunity is created, you may need to add more information about the opportunity, such as headcount/volume, estimated pay & bill rates, upload more job descriptions etc. Using notes is the best way to communicate and track updates with our team members.

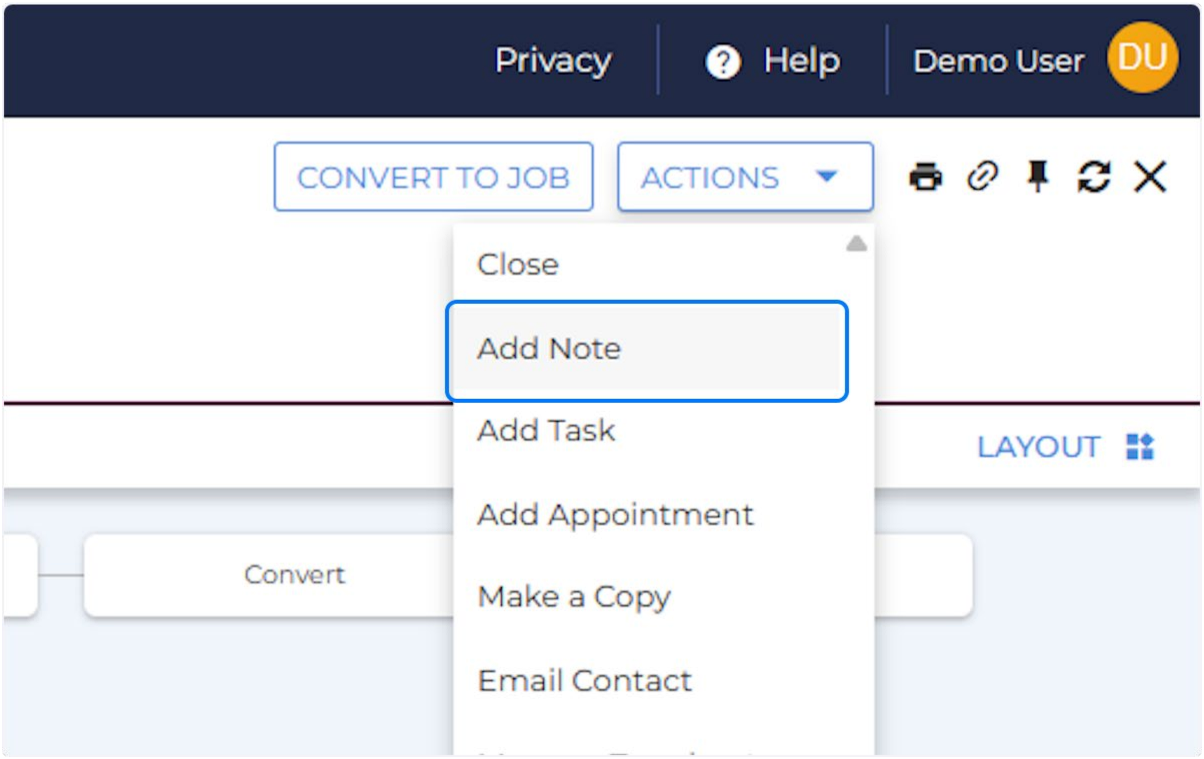
11. From the overview page > Actions button, you can add notes, create tasks, email the sales contact, create appointment/meetings etc.

Note: It is important to send emails for an opportunity from the opportunity record as they will be logged and associated with the opportunity record so you can easily track your historical communication. Ultimately the communication logs will then store on the company record in the activity tabs.

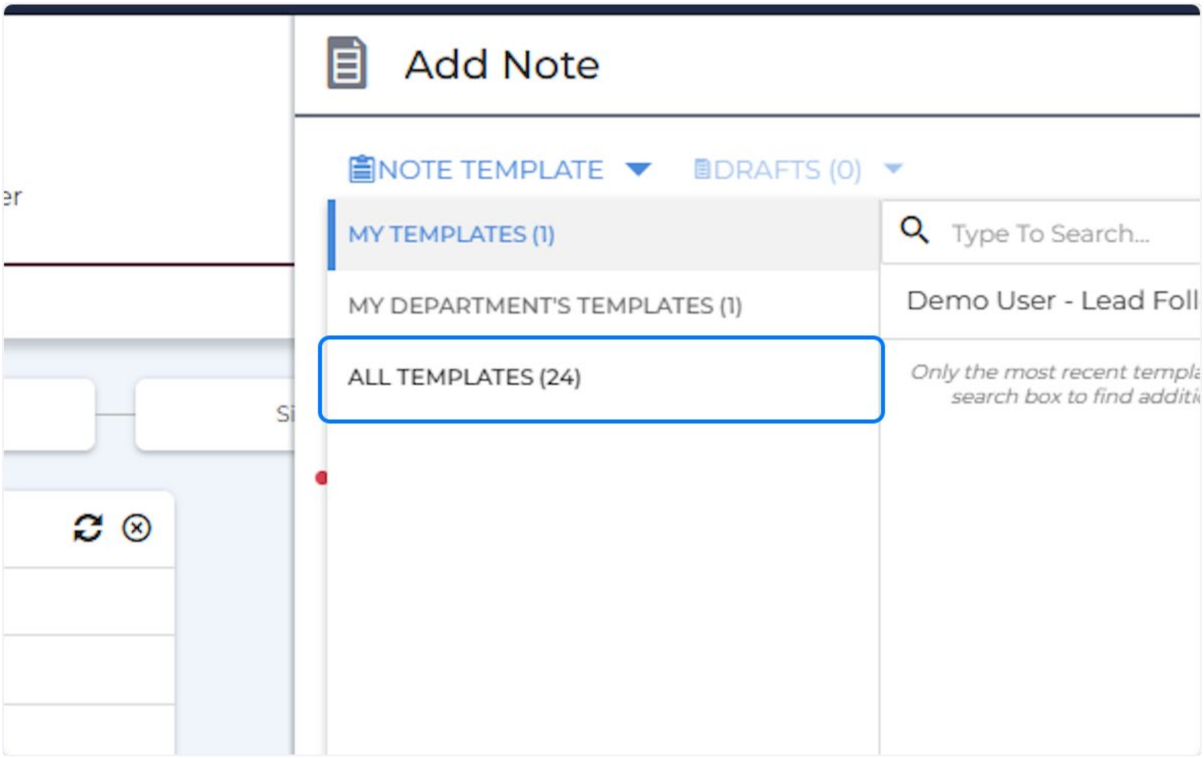


Requesting an Opportunity to Be Reviewed

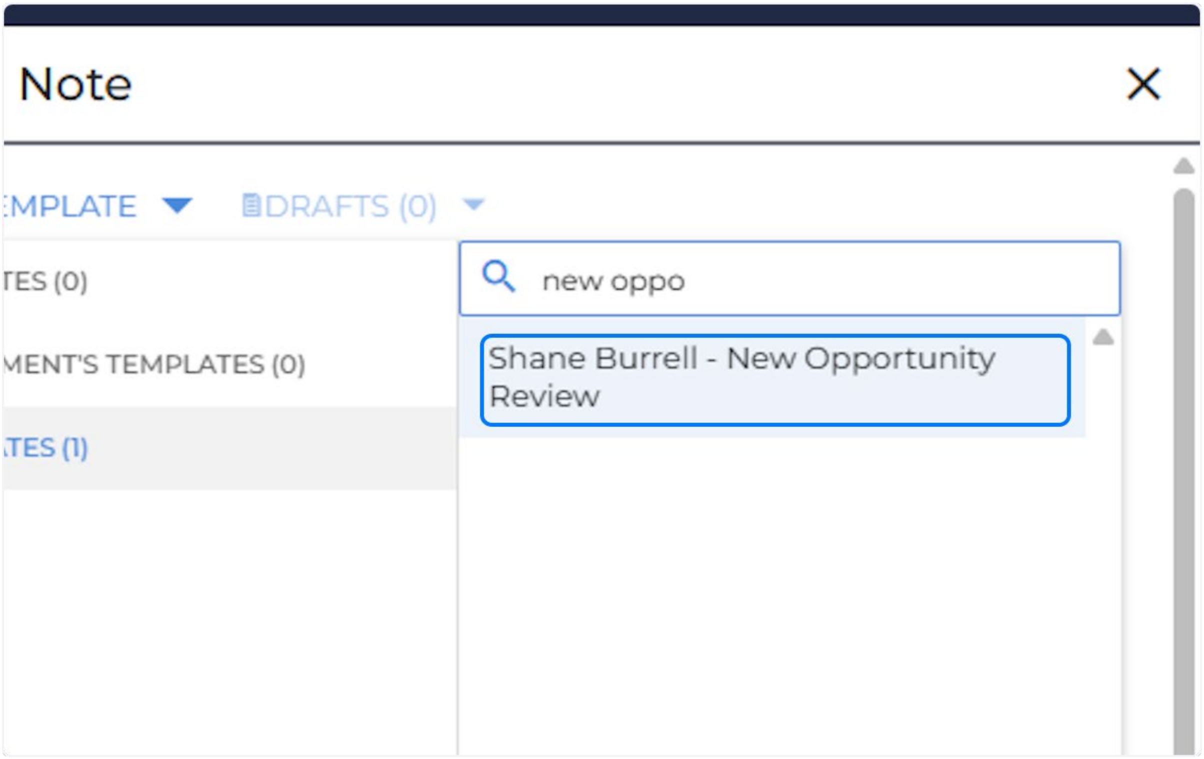
12. From the Actions dropdown button, click on Add Note



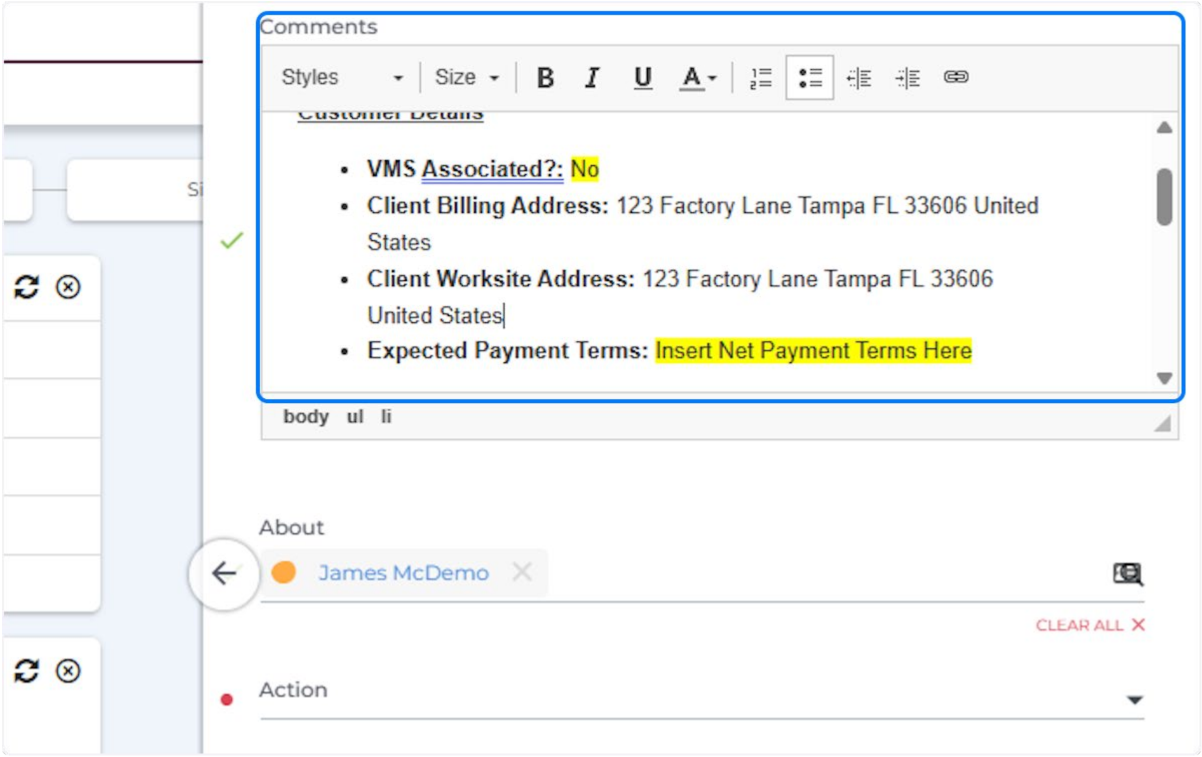
13. Click on NOTE TEMPLATE then ALL TEMPLATES.



14. Search for New Opportunity and select the "New Opportunity Review" template.

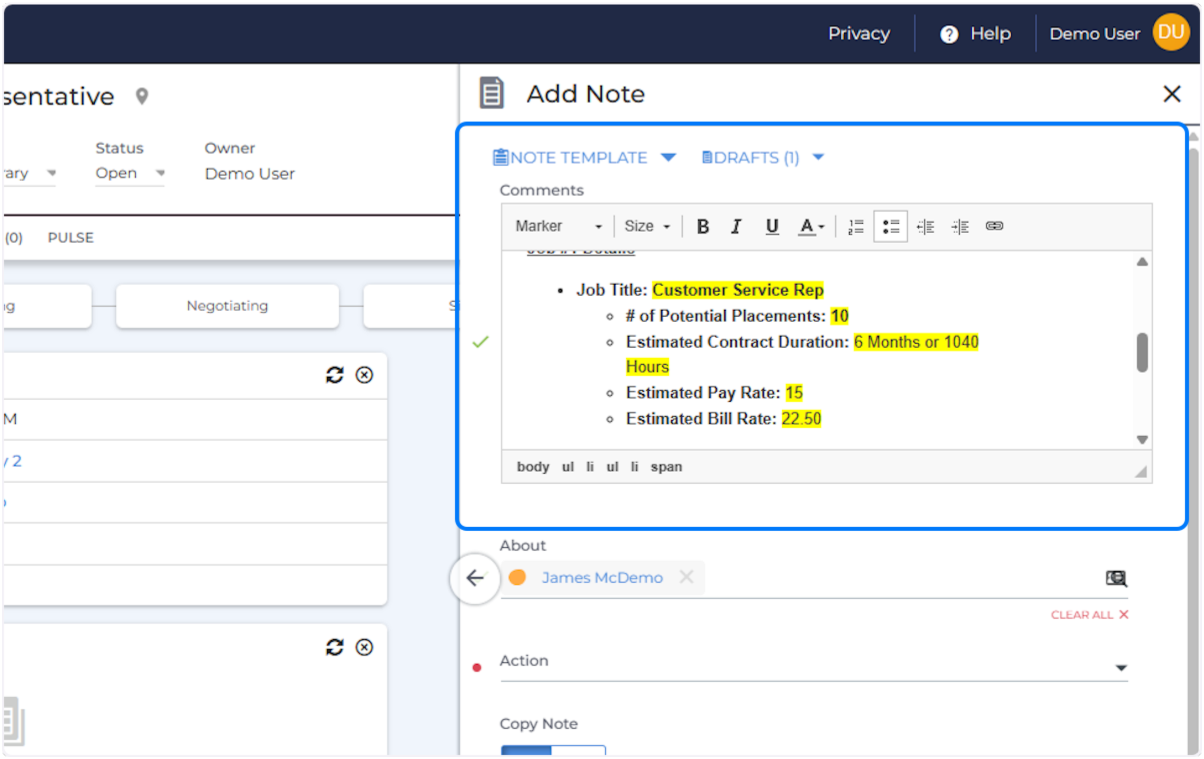


15. A template will populate with bulleted items and highlighted areas, which should be completed.

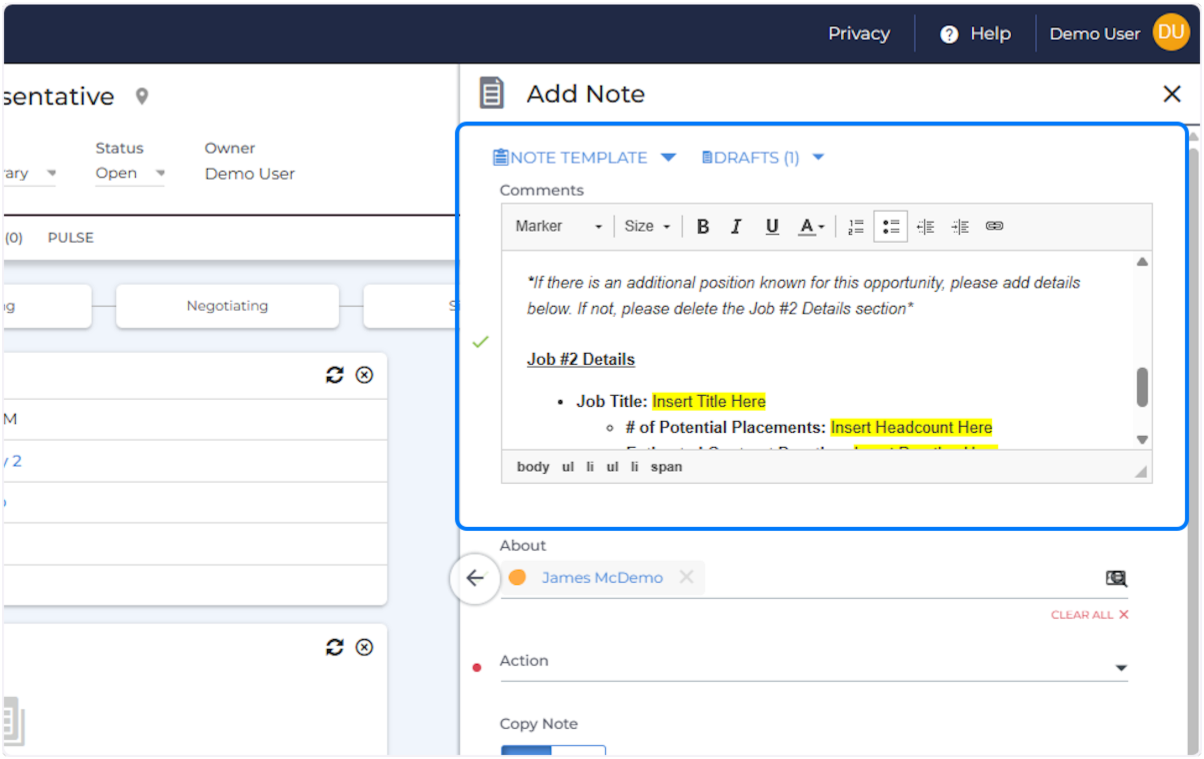


16. Fill in the job title information such as headcount, contract duration and estimated pay/bill rates.

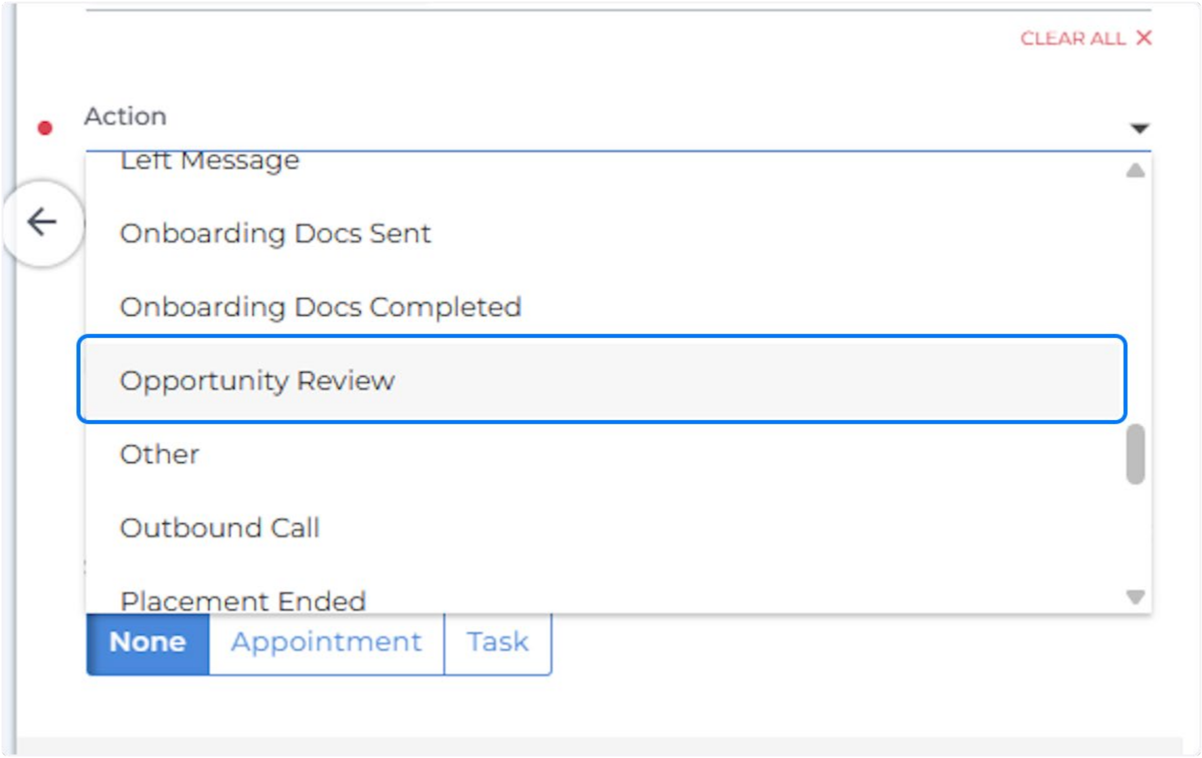
Notes: Even if it's just an estimate, the team needs this ifnroamtion to calculate the required credit coverage needed to fund the customer.



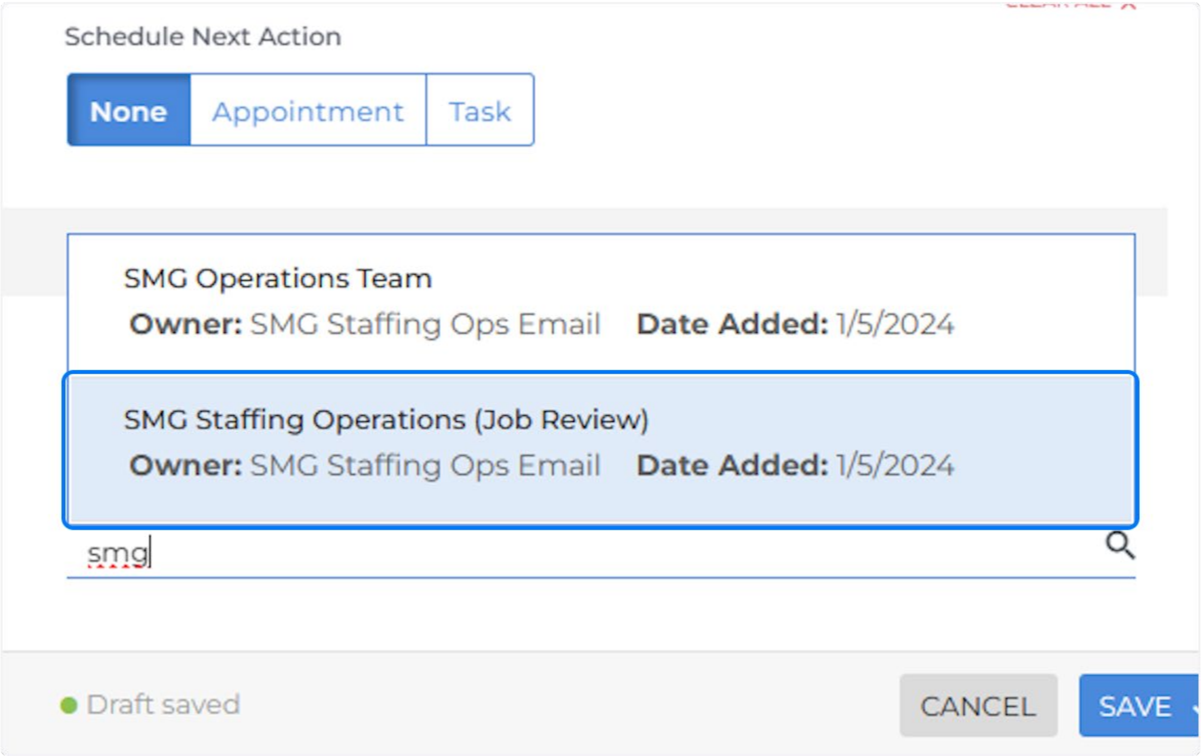
17. If there's a second job to add, complete the Job #2 Details section or erase if there isn't.



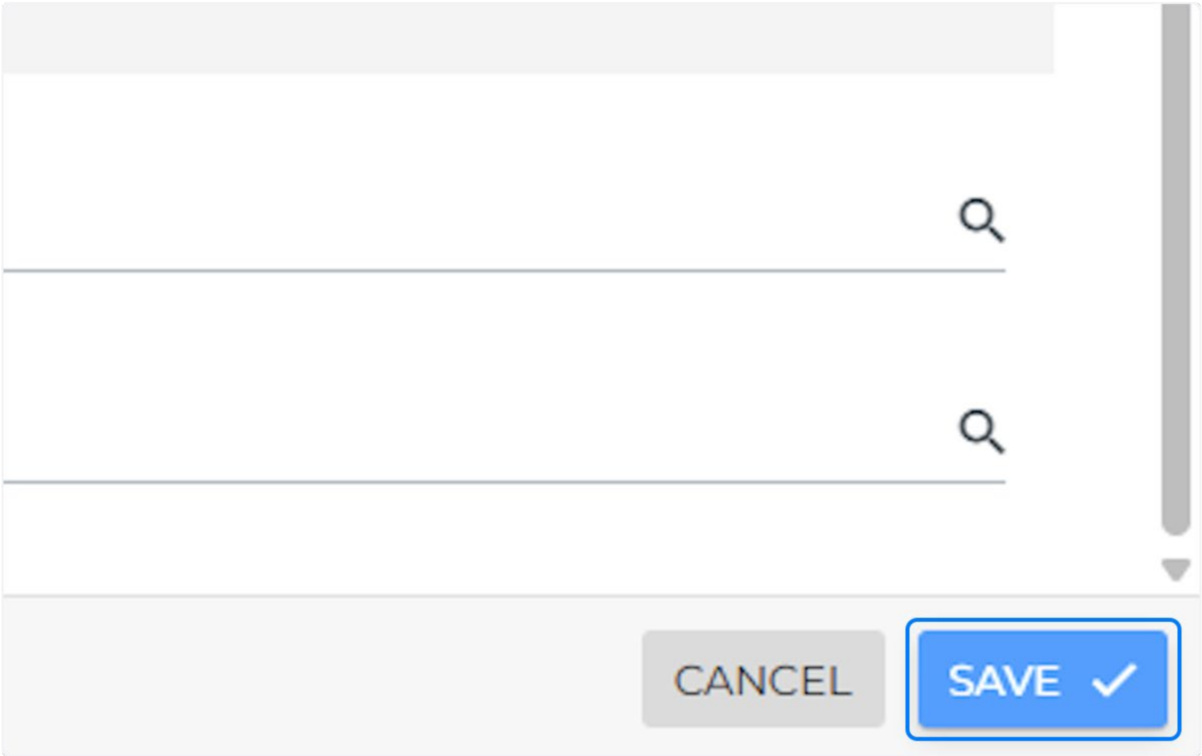
18. Click on the Action dropdown field and select "Opportunity Review".



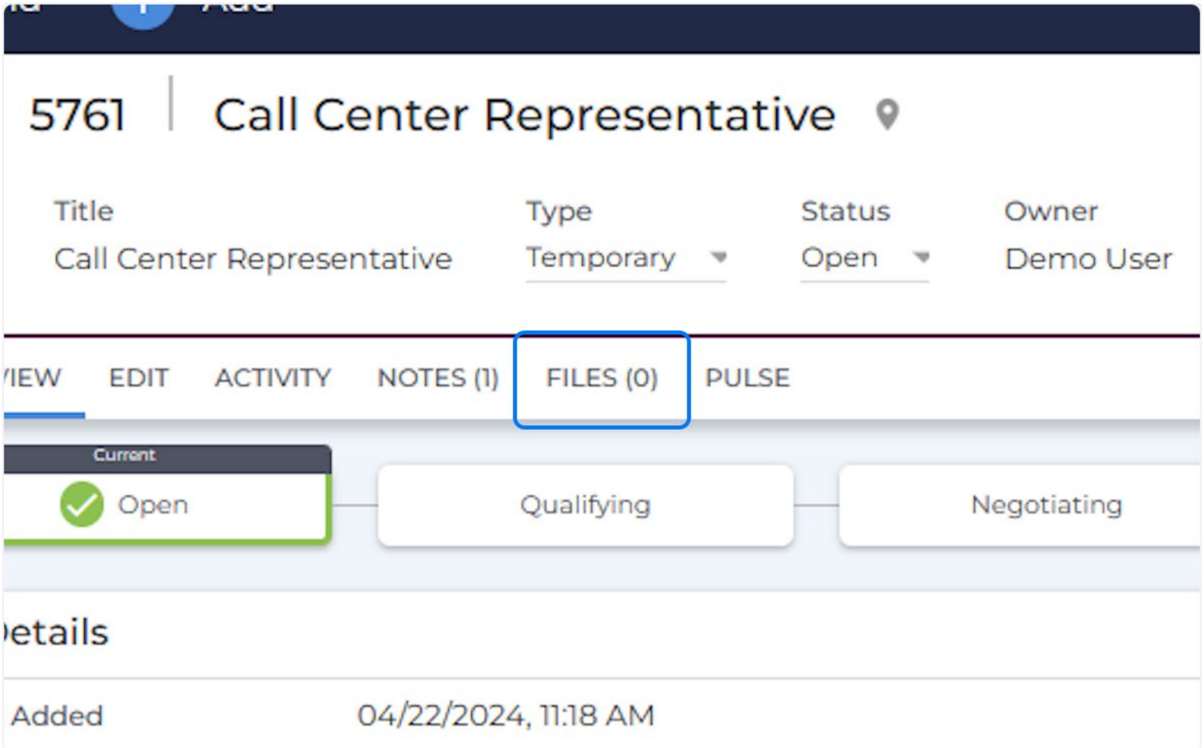
19. Enter your Staffing Manager in the Internal user field and the SMG Staffing Operations (Job Review) in the Distribution field of the Email Notifications section.



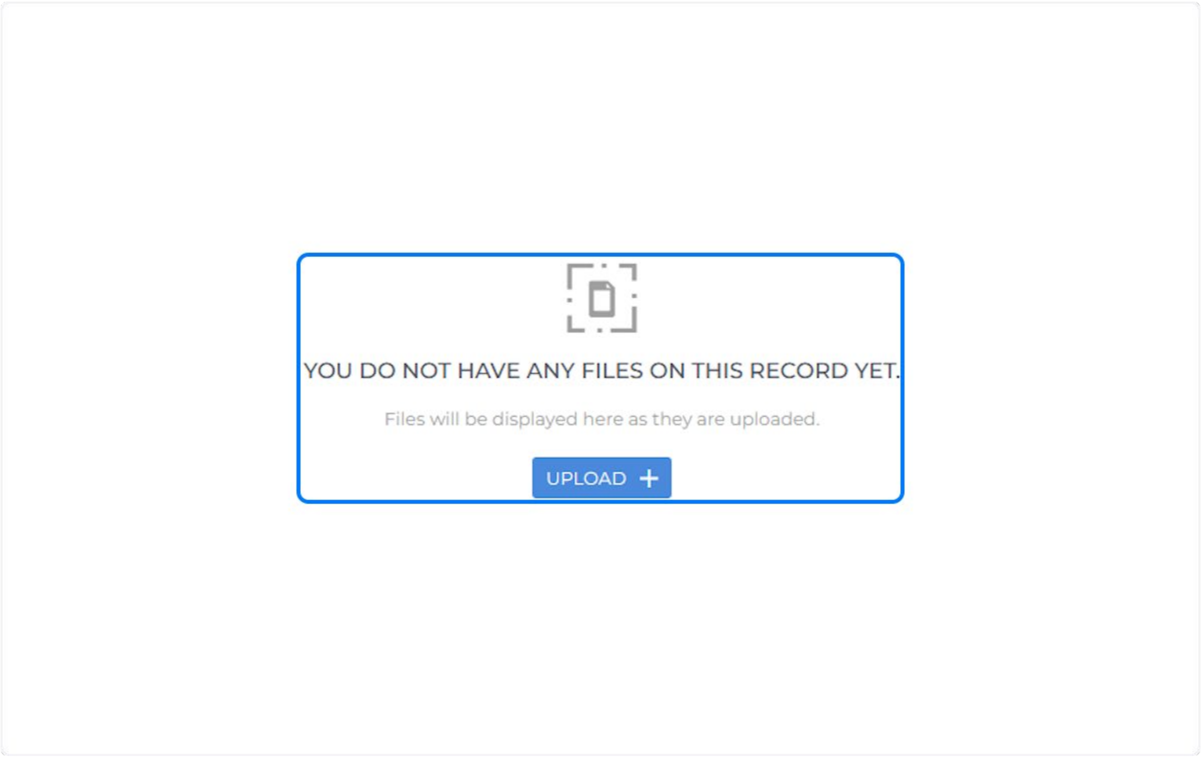
20. Click on SAVE.



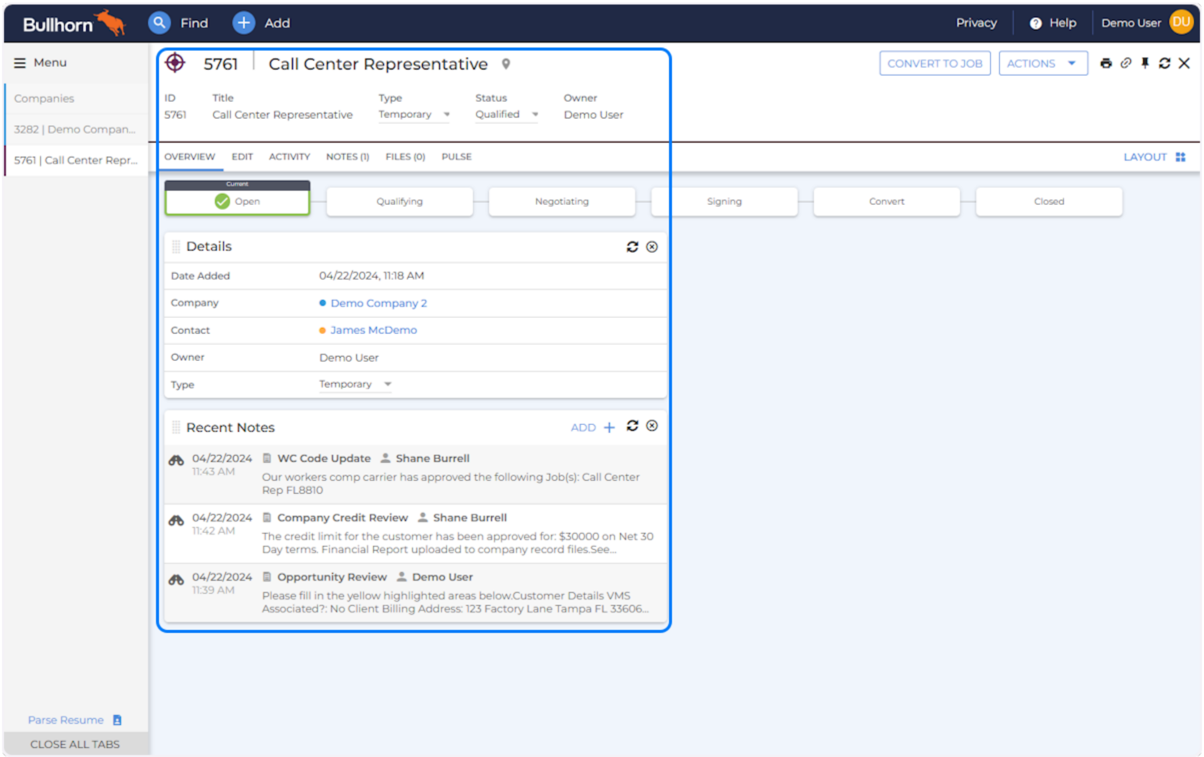
21. If you are adding multiple jobs, you can either create a new note with the job description or add a job description document by clicking on FILES.



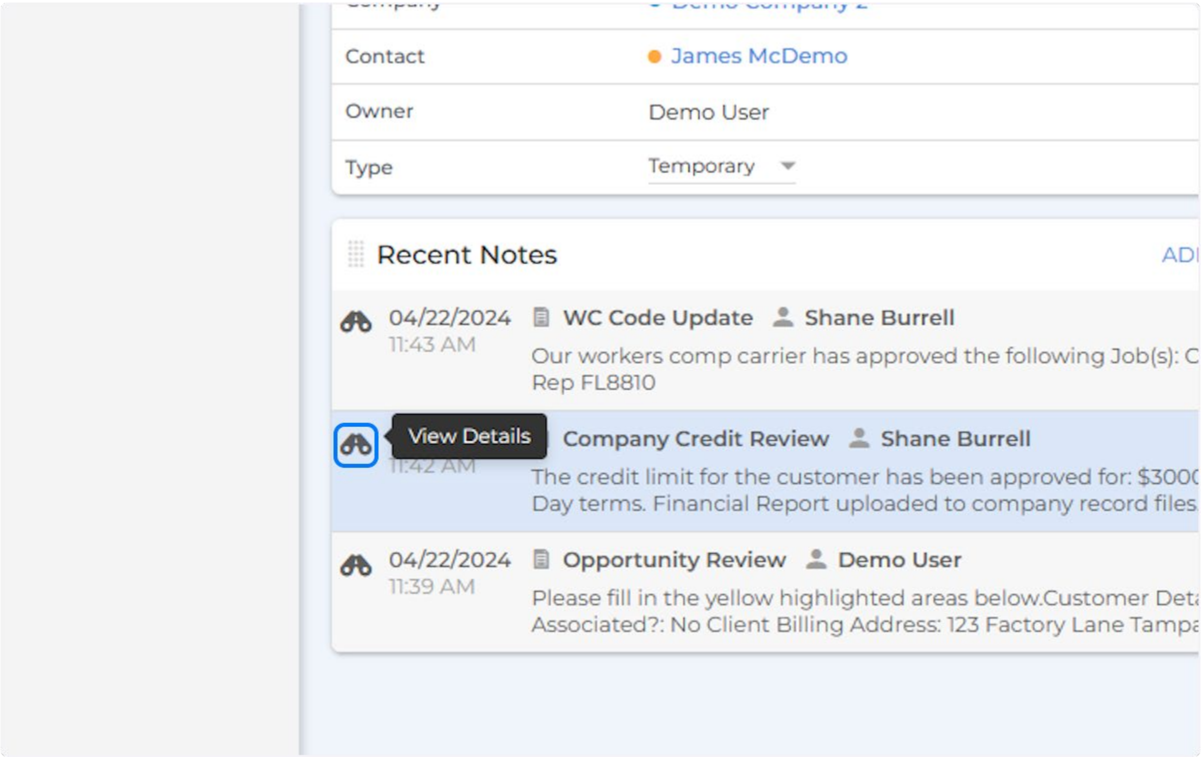
22. Click Upload + to add the file and label as a Job Description for the file type.



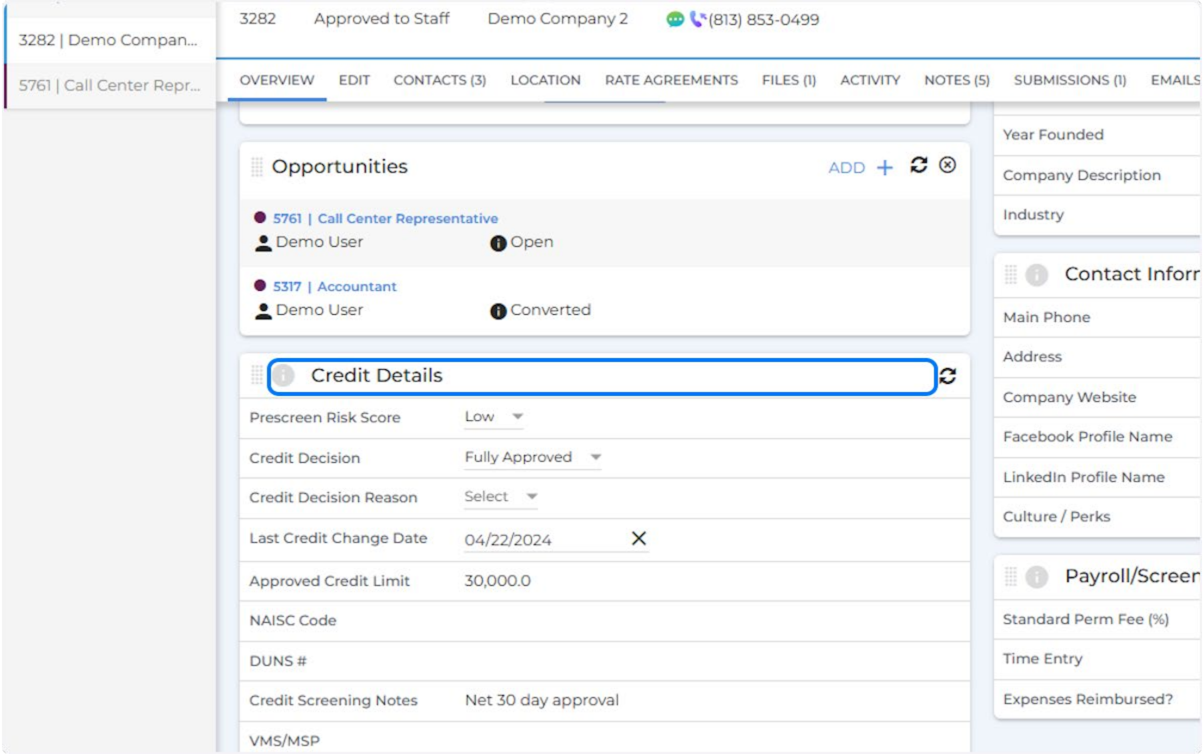
23. Once you submit for review, the back office team will review the details and update the opportunity with 2 notes: WC Review and Credit Review.



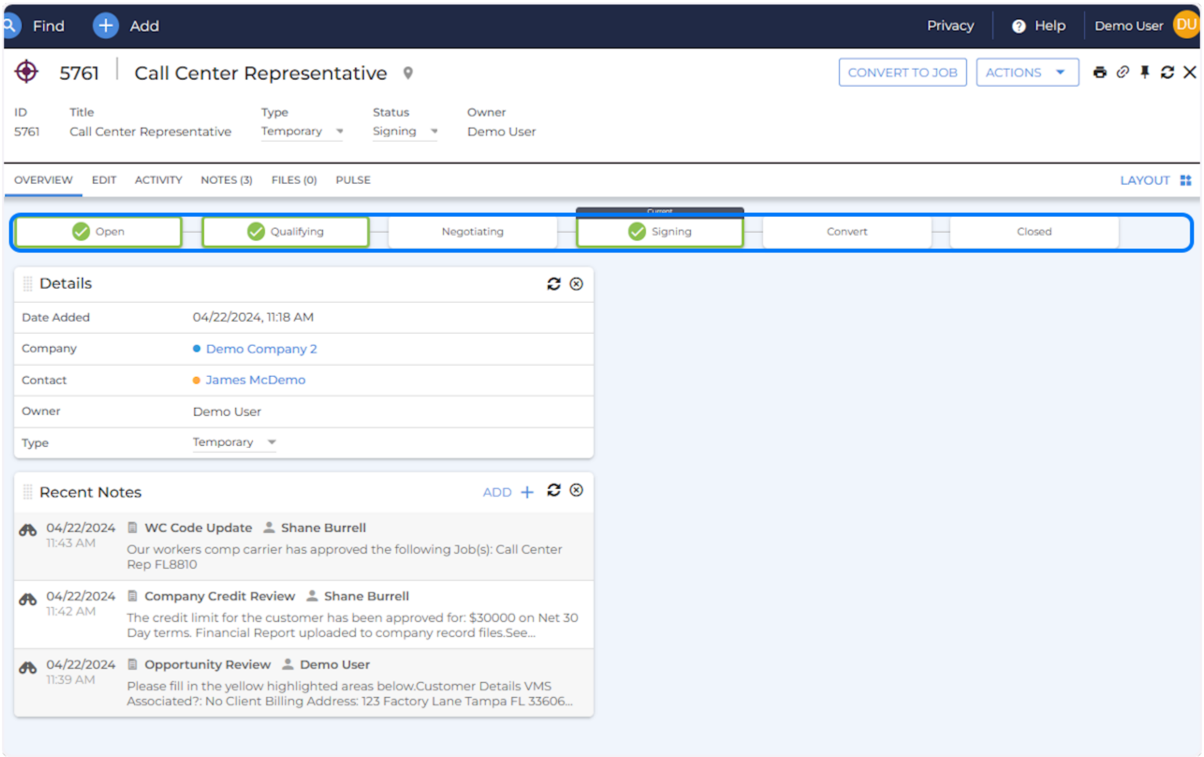
24. View the details of the note by clicking the binocular icon from the recent notes section.



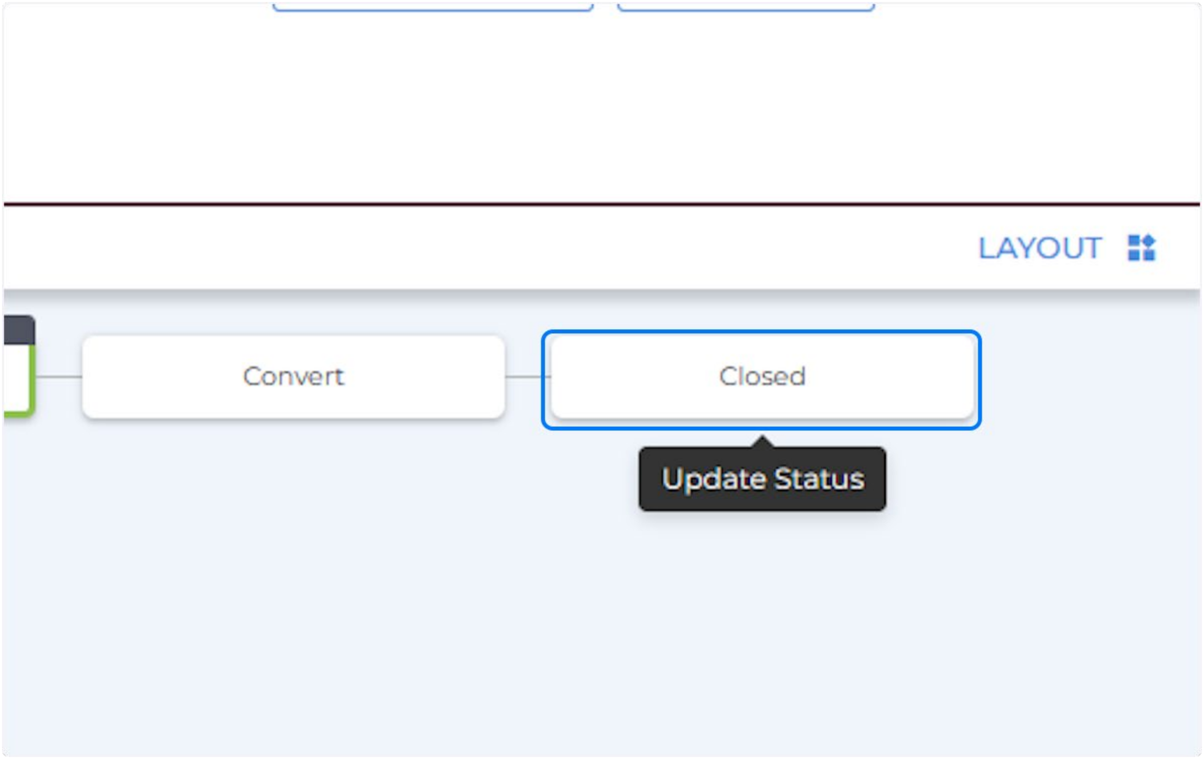
25. Open up the company record, and the status of the company should be changed by the team and the credit details section will be updated.



26. Once the opportunity is approved, you can move the sales process forward by using the pipeline stages shown below.

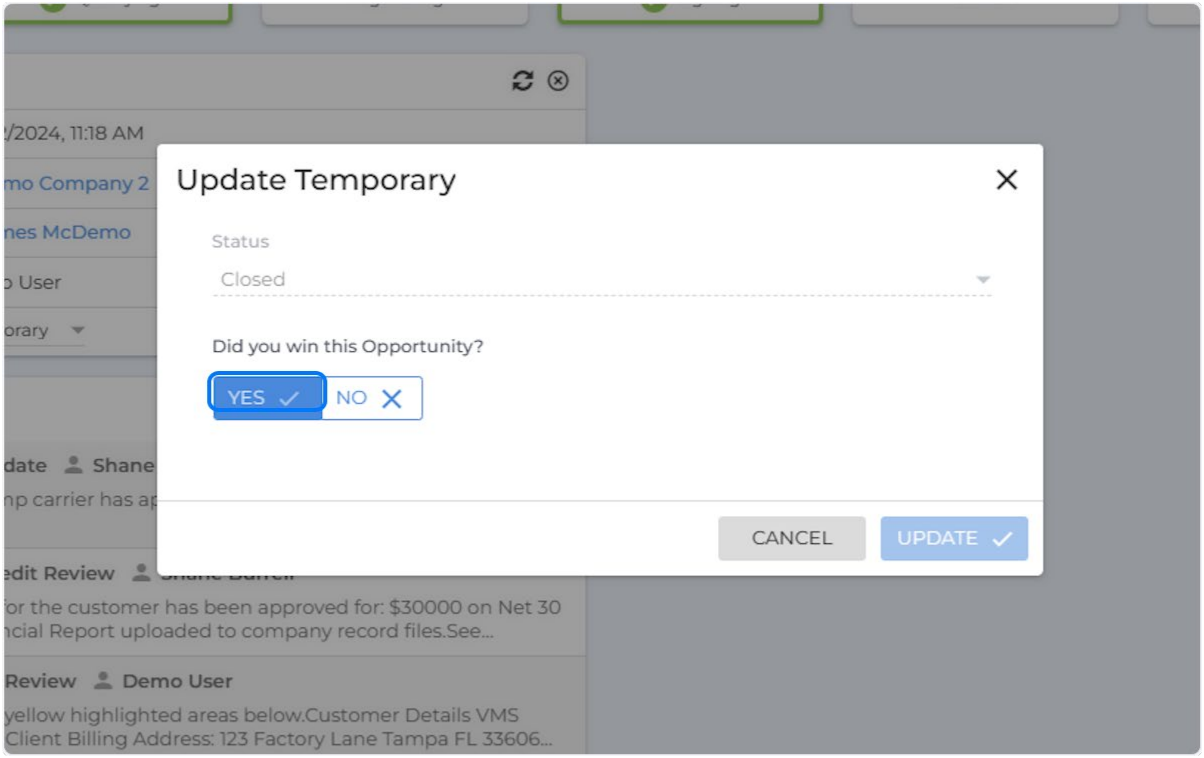


27. To close the opportunity, click on Closed

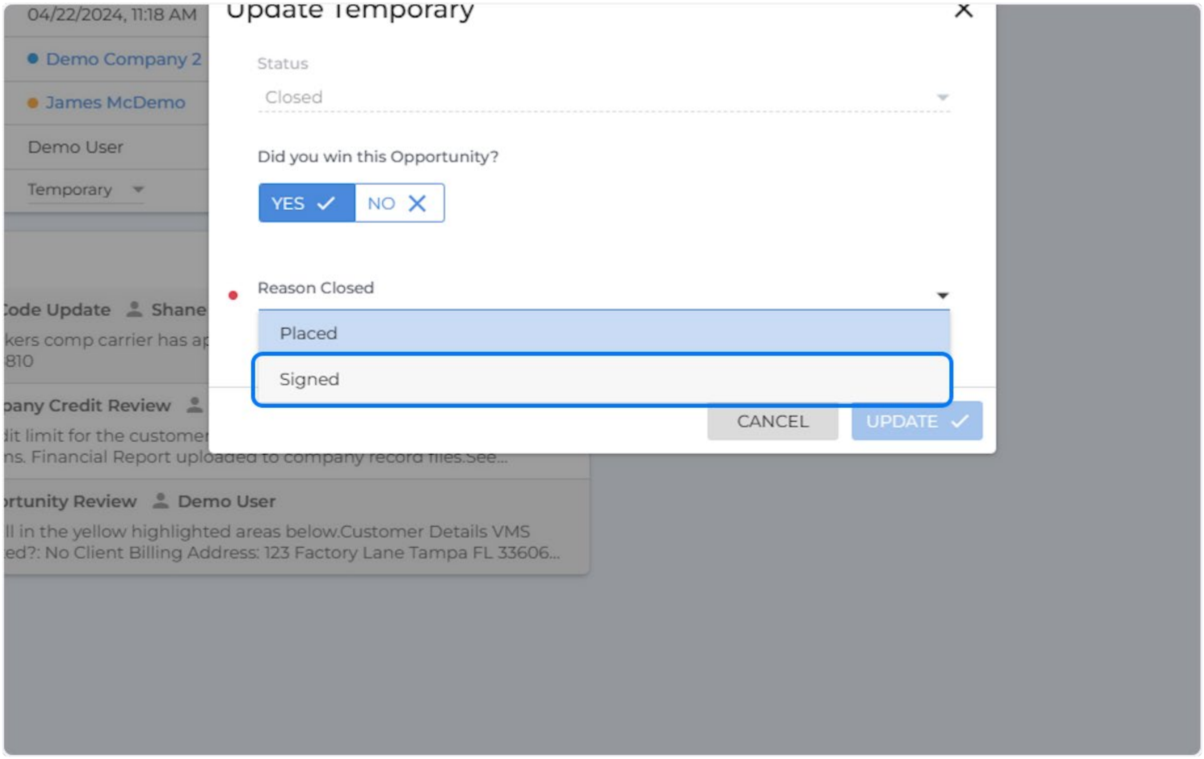


28. Select "YES" if you won the opportunity or select "No" if you lost.

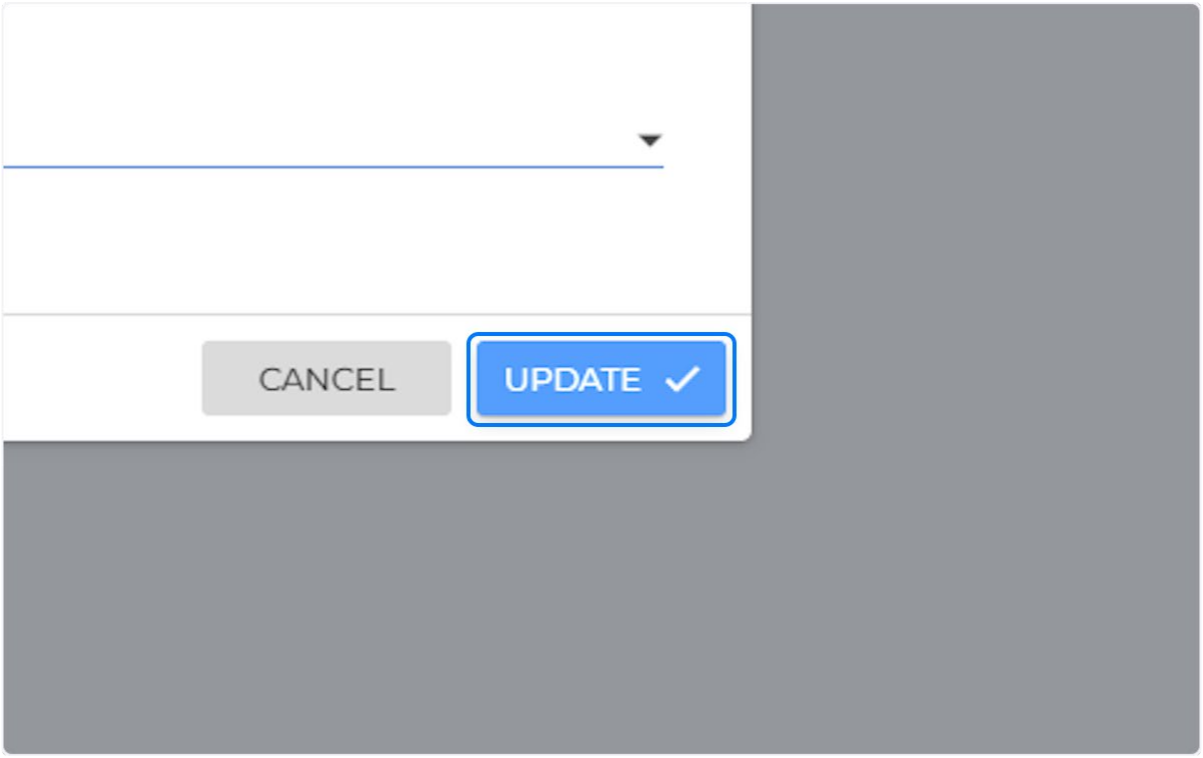
Note: Closing out an opportunity is important to remove the opportunity from your open opportunities in the pipeline.



29. Select one of the following reasons for why the deal is being closed.



30. Click on UPDATE.



You can convert an opportunity to a job at any time, which allows you to track the number of jobs created from that opportunity and will cut some time by automatically pulling over information such as job title, contacts and job descriptions.

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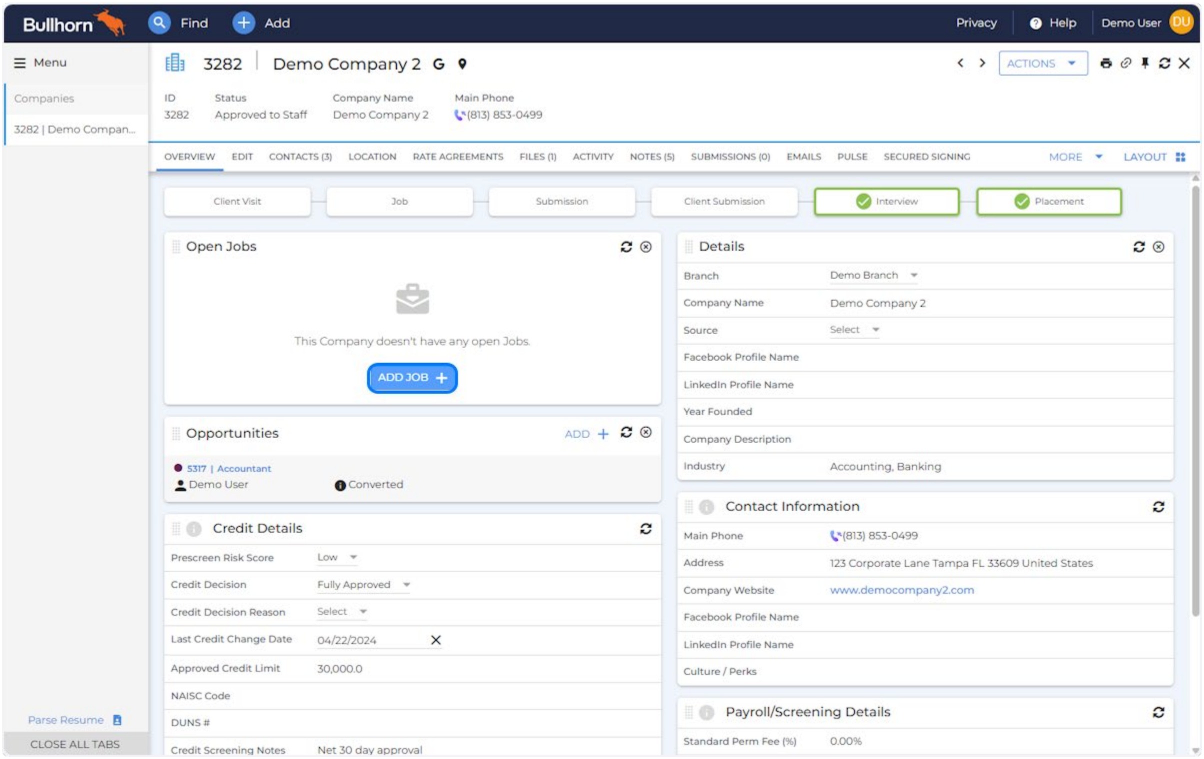
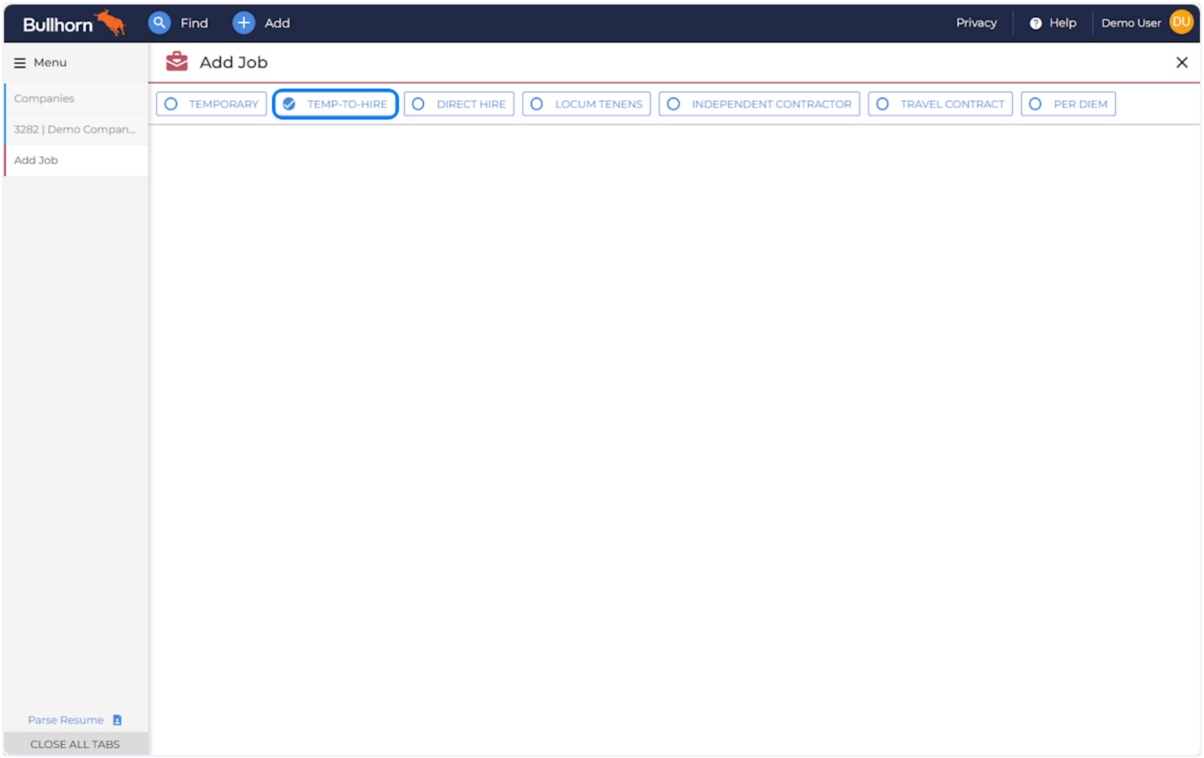
31. Click on CONVERT TO JOB.

Creating a Job in Bullhorn

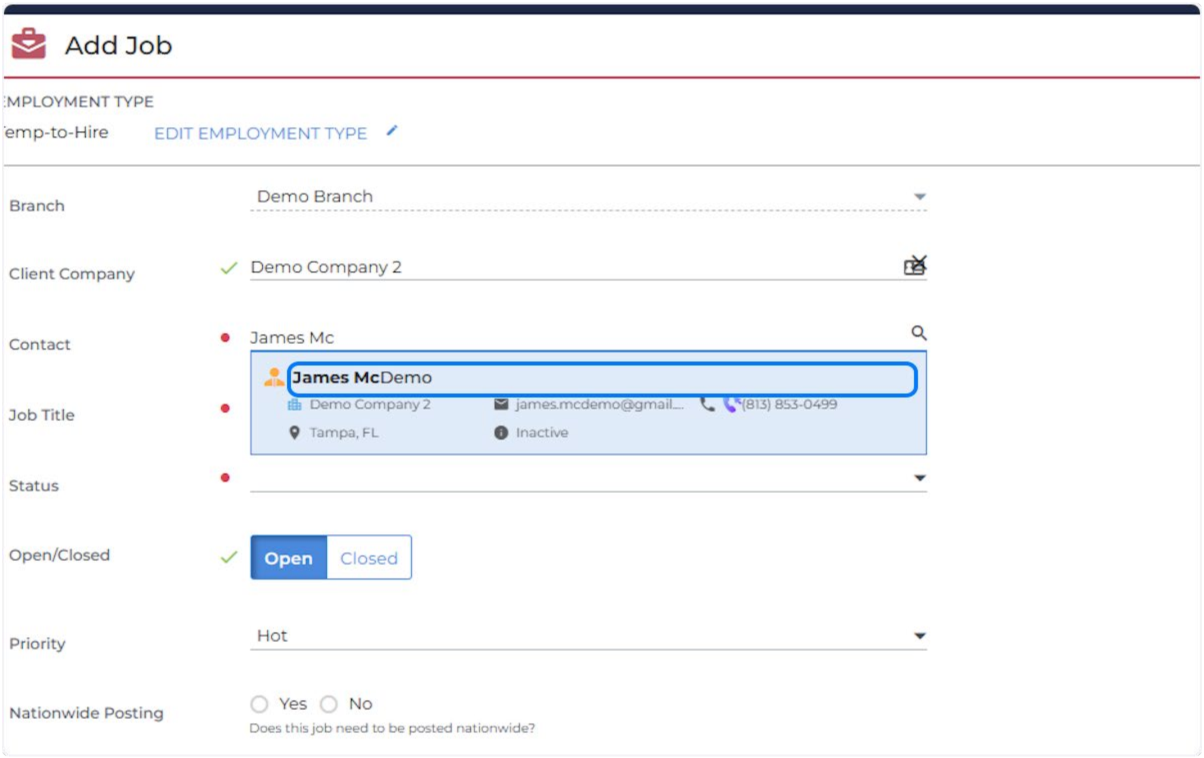
1. From the company record, click on ADD JOB.



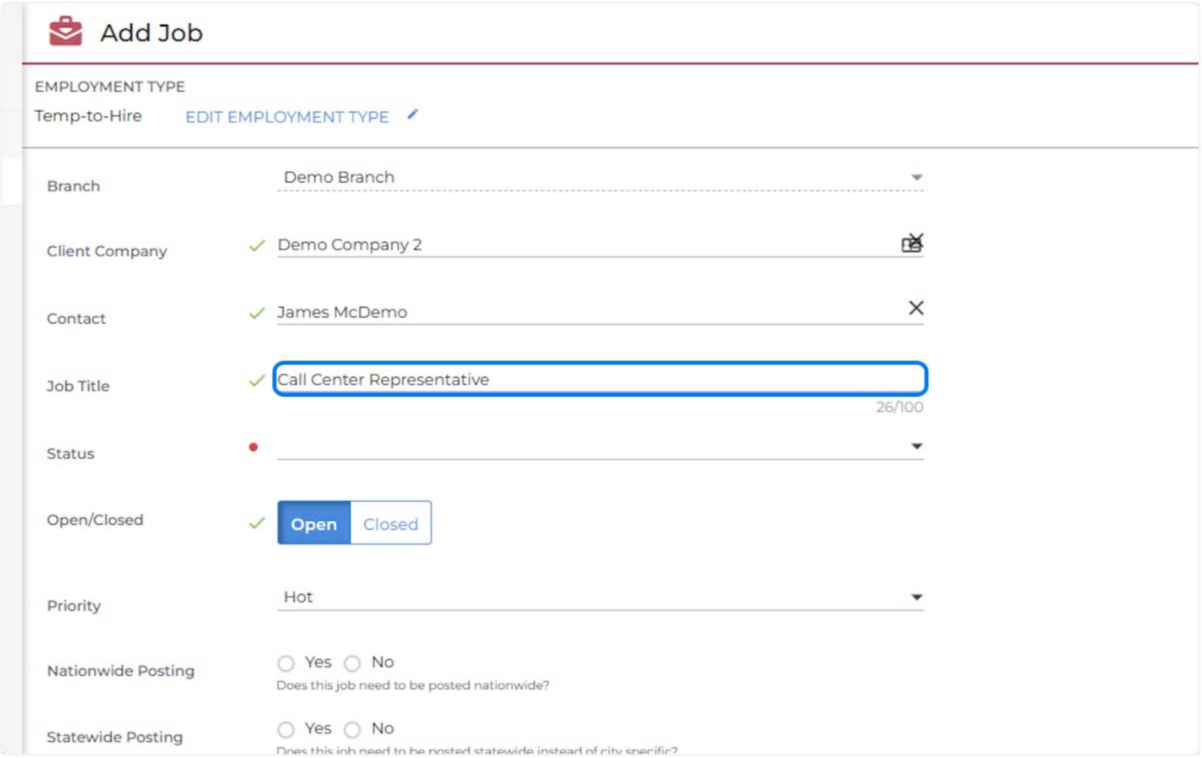
2. Select the type of job you are creating. This will change the layout of the fields.



3. Enter and select the sales contact name.

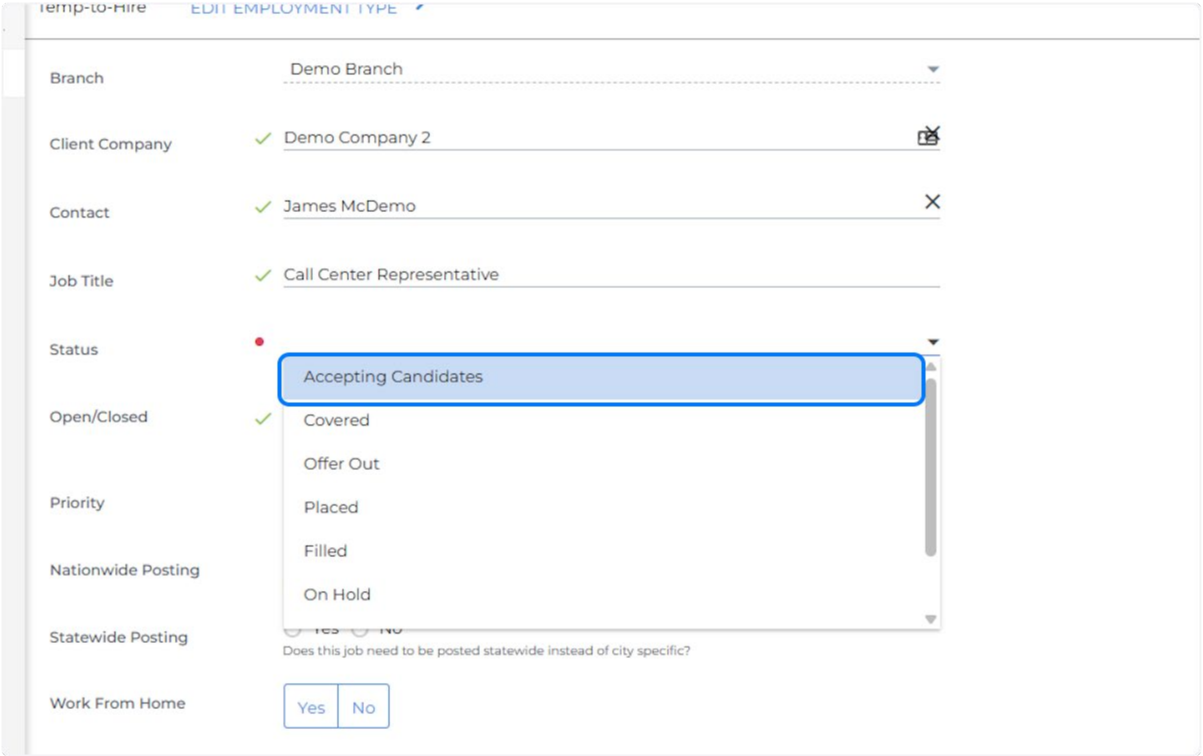


4. Enter the job title.



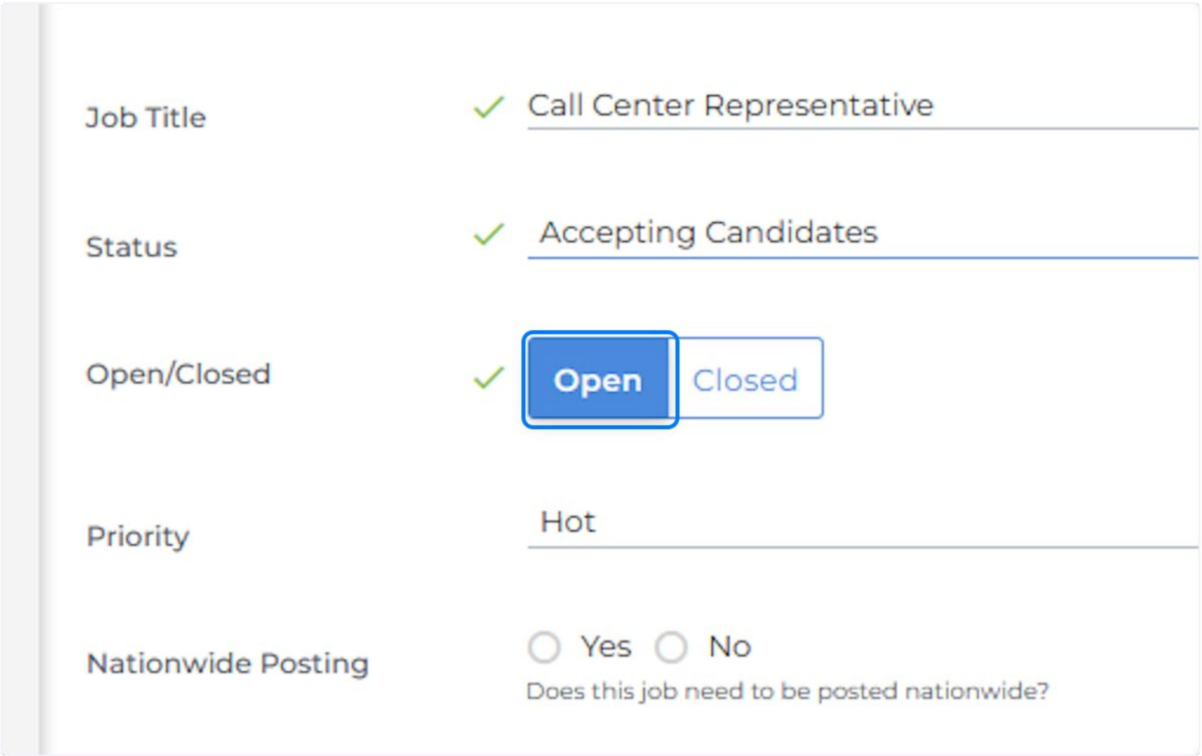
5. Click on

Important Note: Having the status as Accepting Candidates and the job Open will automatically post the job to the job boards on our brands websites. If it is not set to these criteria's, then it will not post. From their, a Staffing Manager can assist with posting the jobs out further to boards such as Indeed, Zip Recruiter etc. via [Distribte.io]

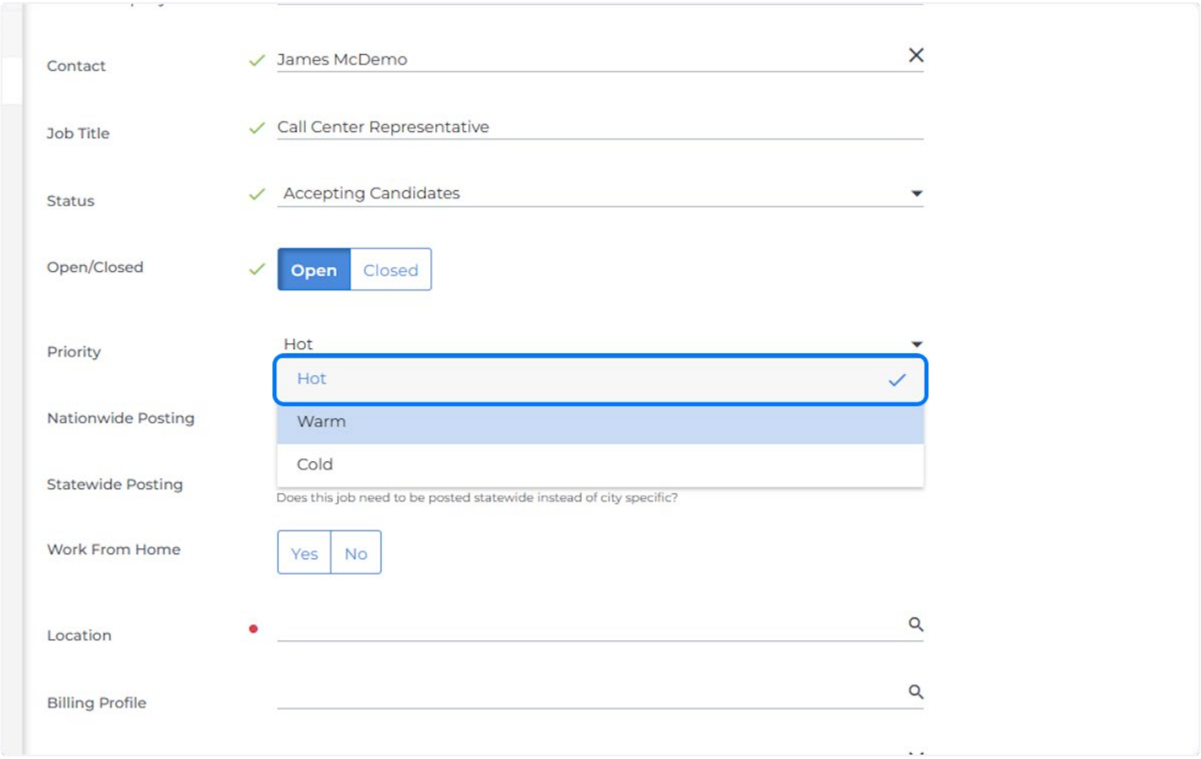


6. Click on Open.

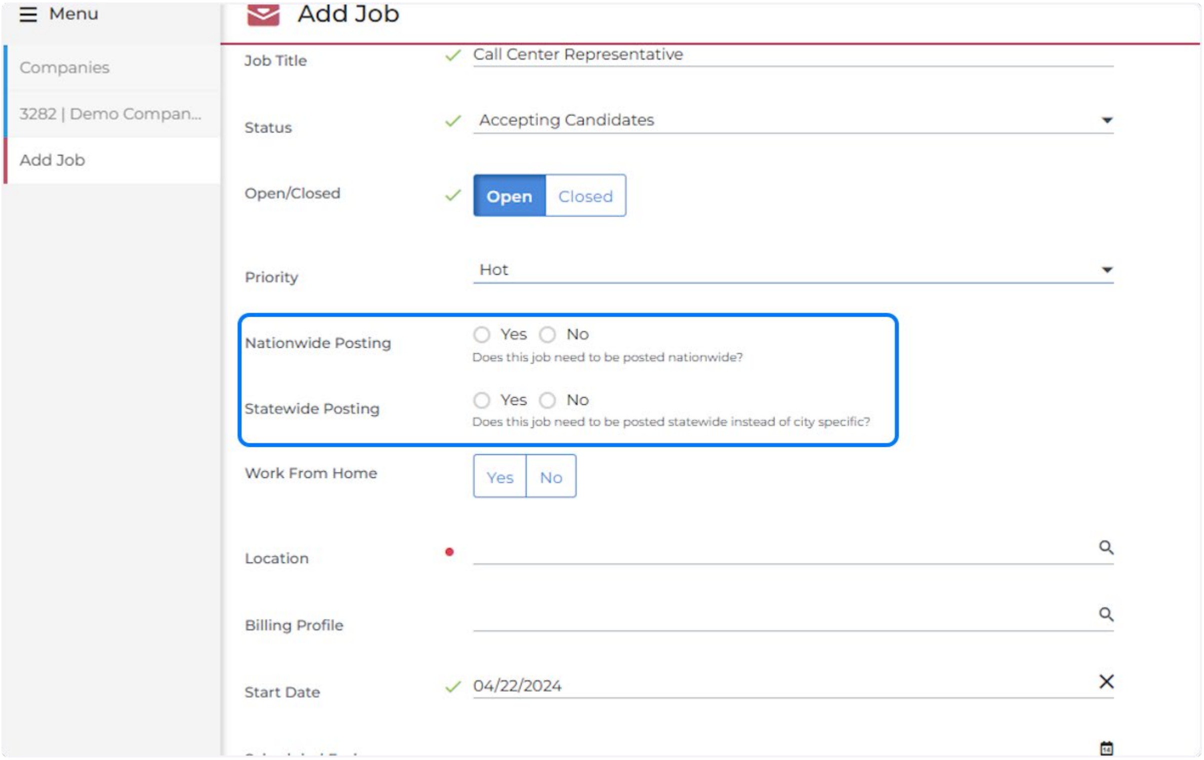
Note: Make sure to close the job out once finished with recruiting for the openings.



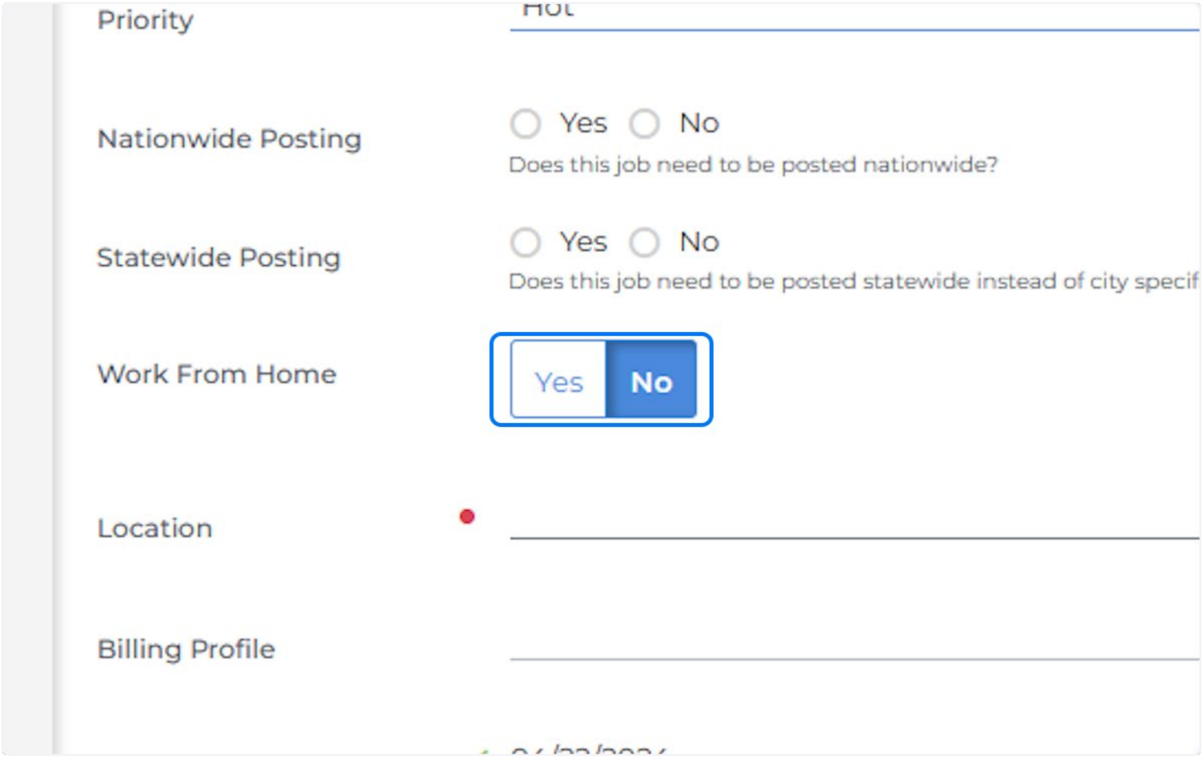
7. Select a priority of the job.



8. If posting this job on our job board and would like this job to be searchable for the USA or all across the state without a specific city attached, then select from the radio options.

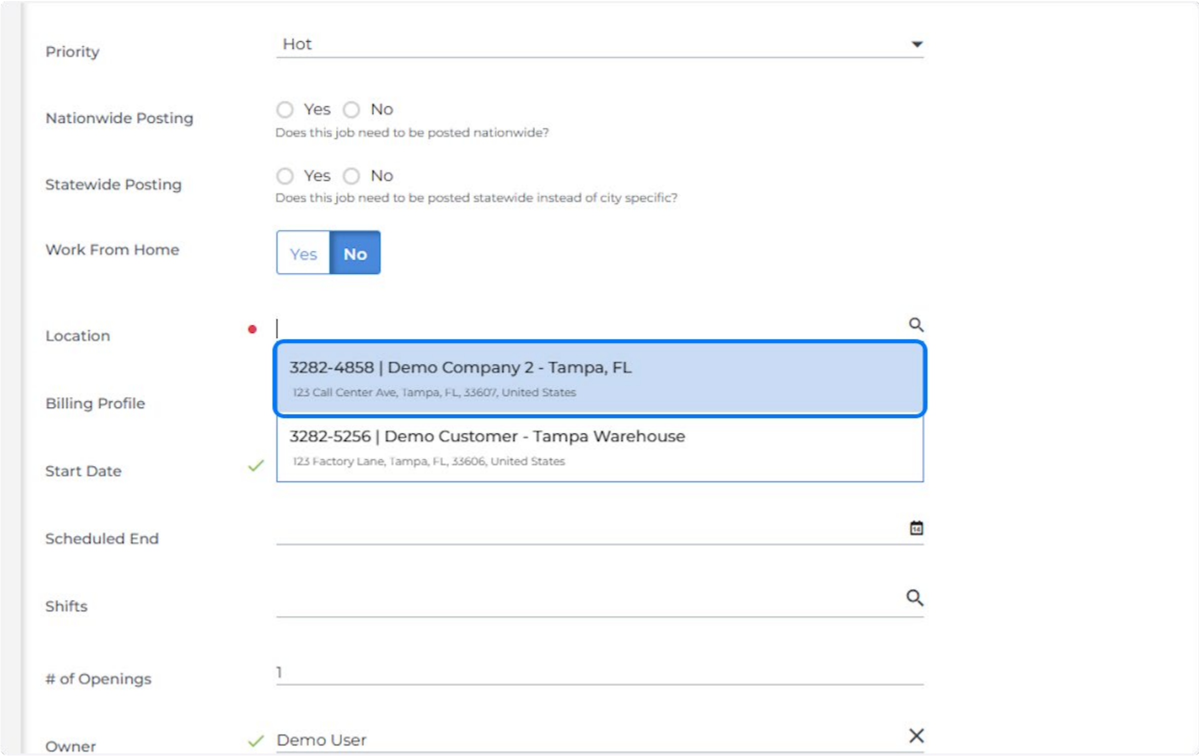


9. Here you can add when the job is a remote role or not.

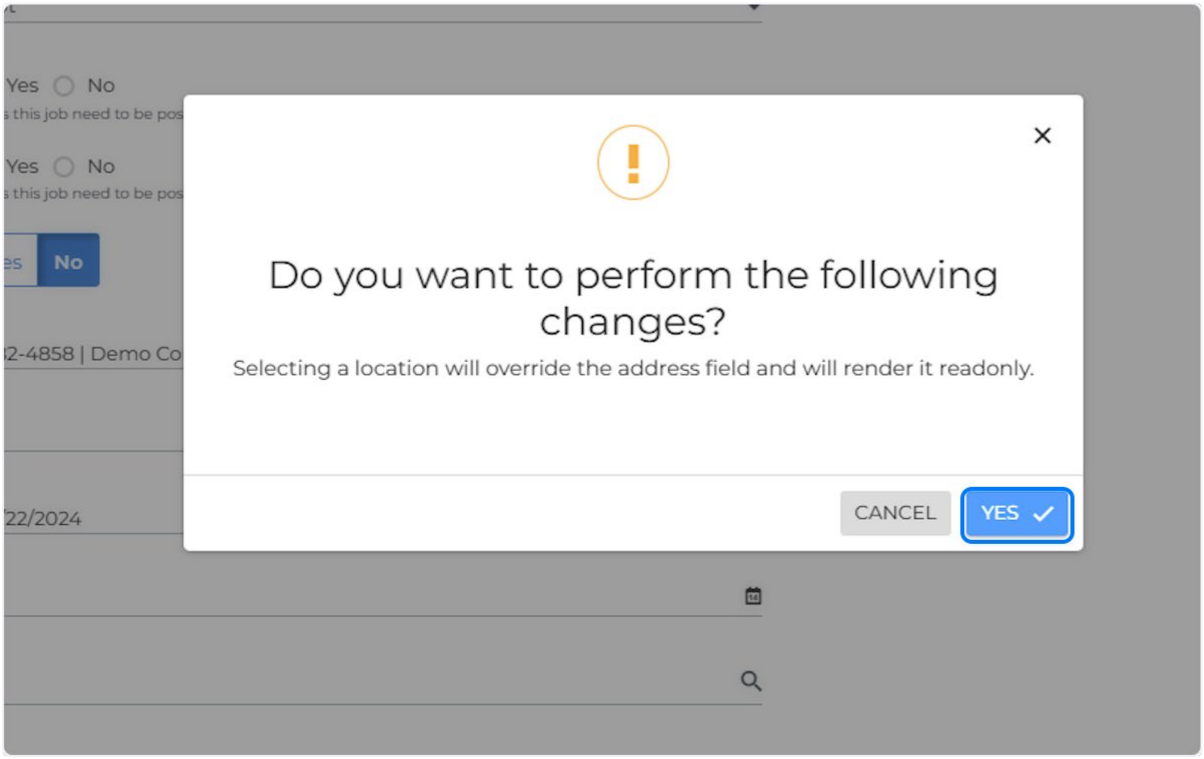


10. Select a worksite location for the job. If there's several locations, then a new job must be created per location.

Note: In earlier steps, we created a location during the company setup process. A location will only appear from this list if it is set as a worksite location.

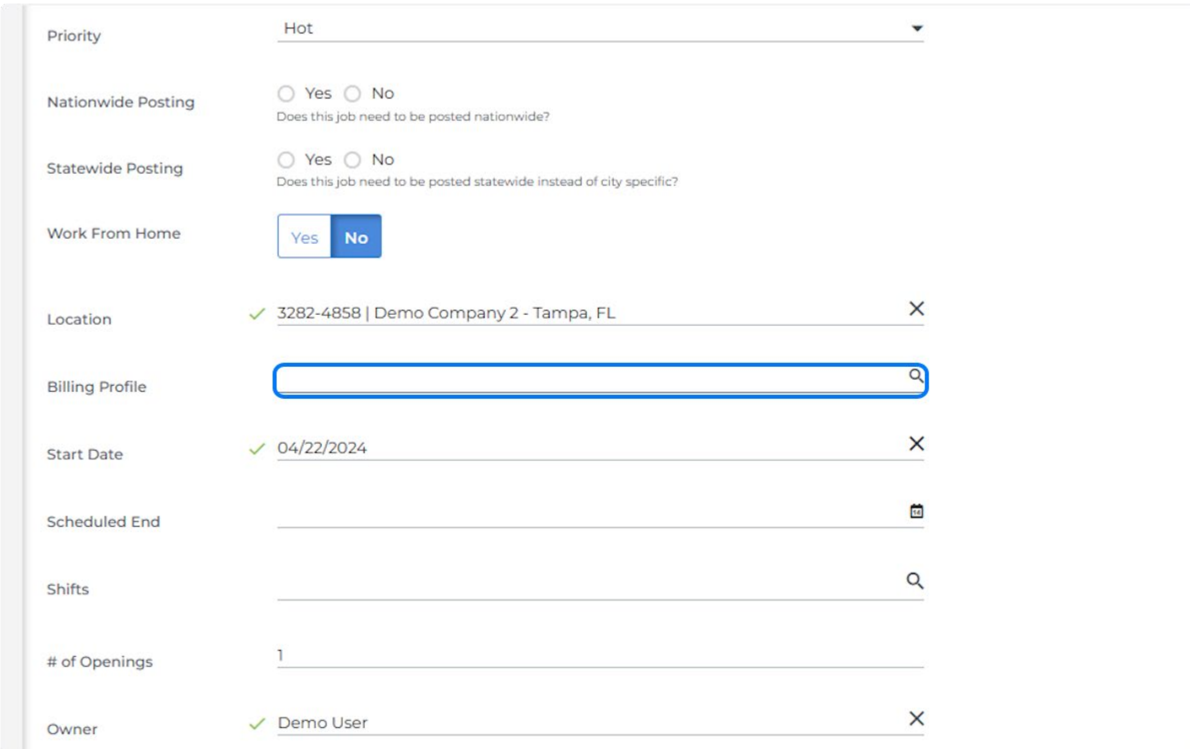


11. Click on YES when this message appears.



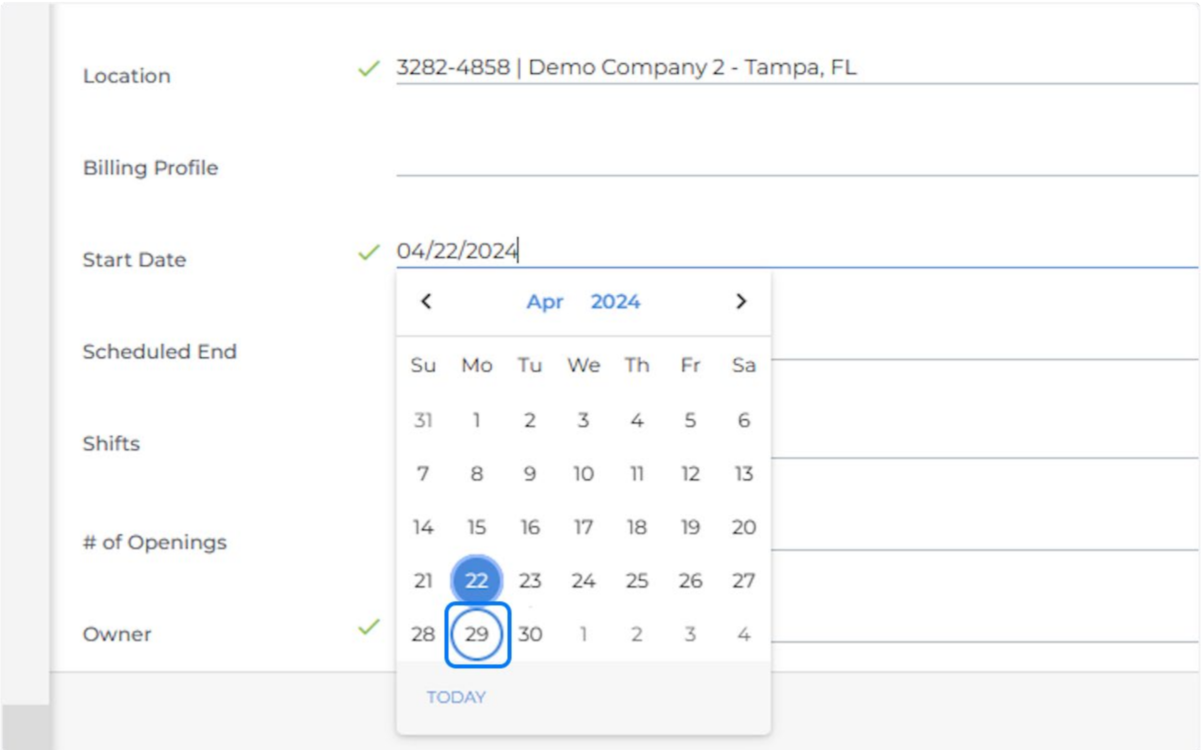
12. Add a billing profile if available.

Note: Billing Profile is not a required field on a job record but will be required when setting up placements. Adding it onto the job record make it much easier to setup placements in the future.



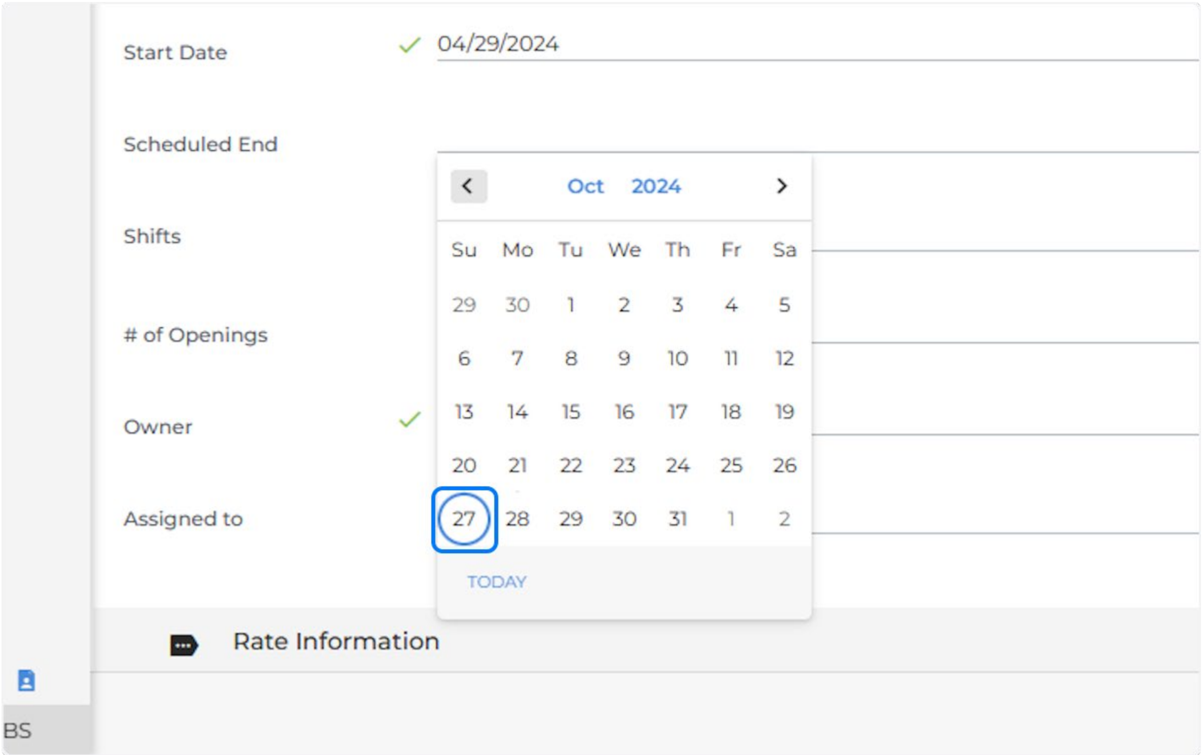
13. Select the start date of the job from date selector.

Note: This start date is just an estimate and does not restrict from placements with future dates.

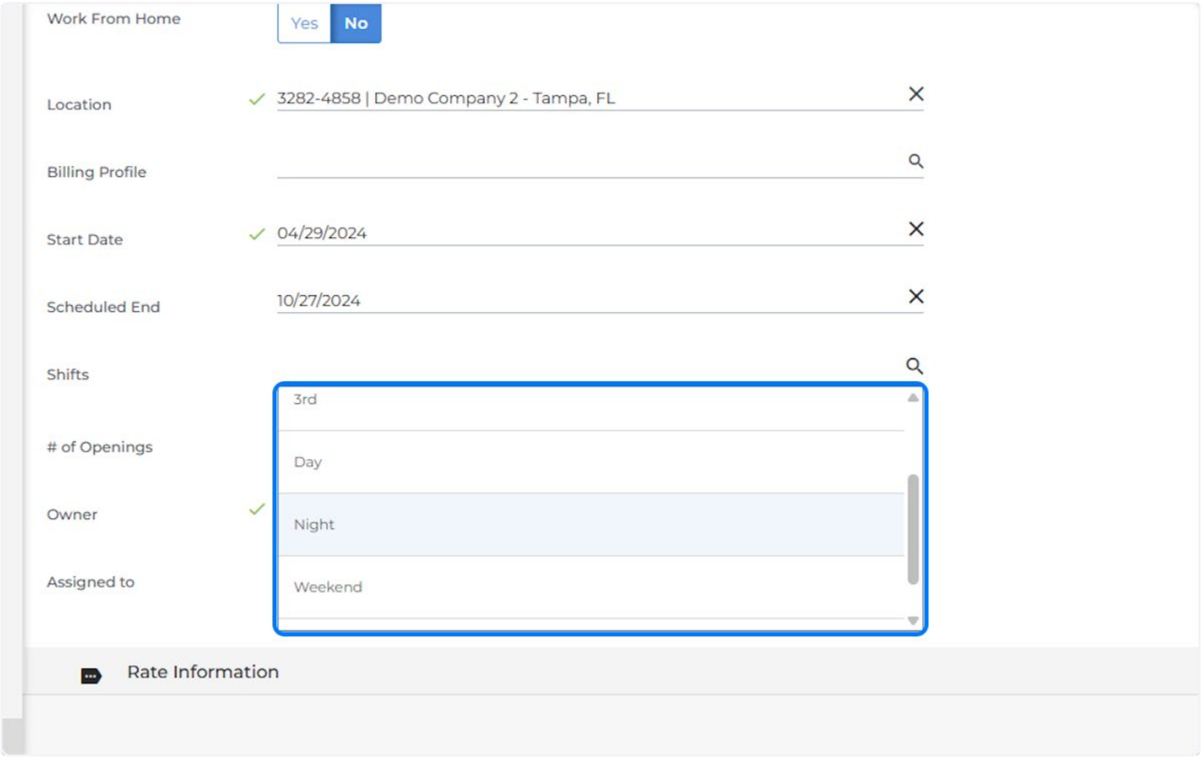


14. Select an end date for the job, if known.

Note: Bullhorn Analytics pulls it's data for job orders such as profitability only if there is a known start date and end date. If the job order or placement is left open ended, there will not be a calculation for temp orders.

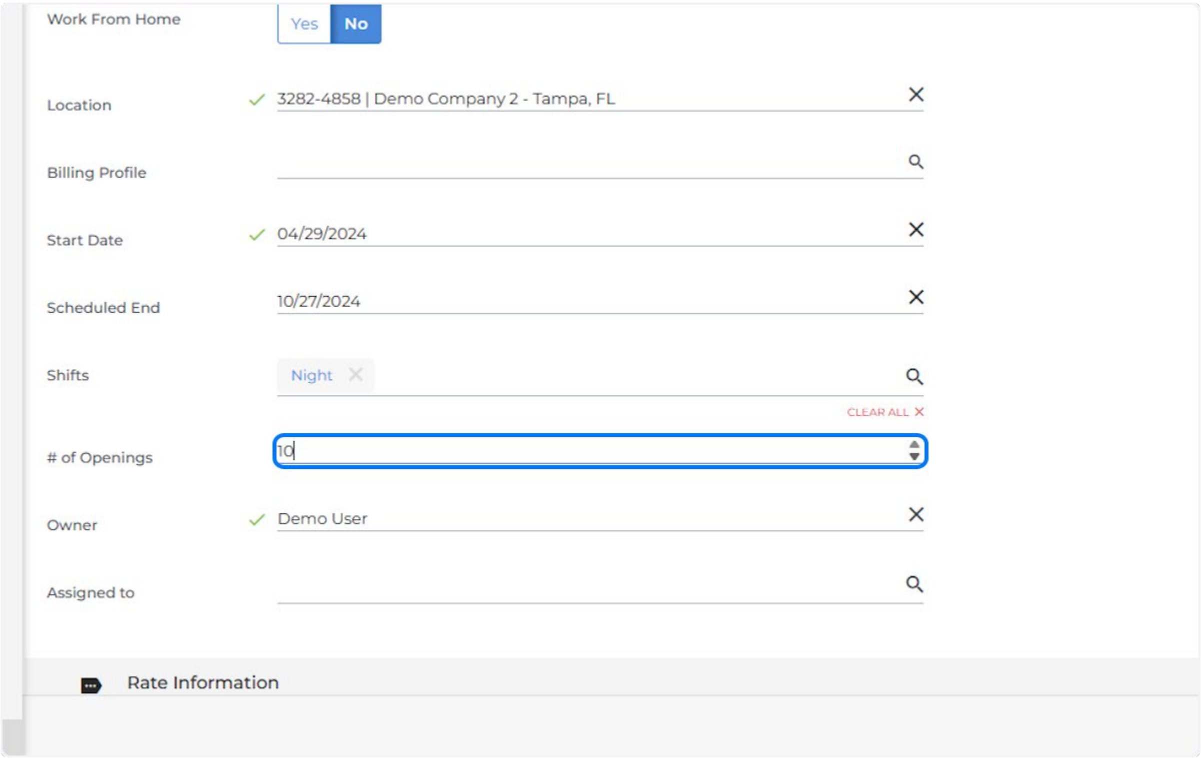


15. If applicable, for recruiting or filtering purposes, add a shift type.

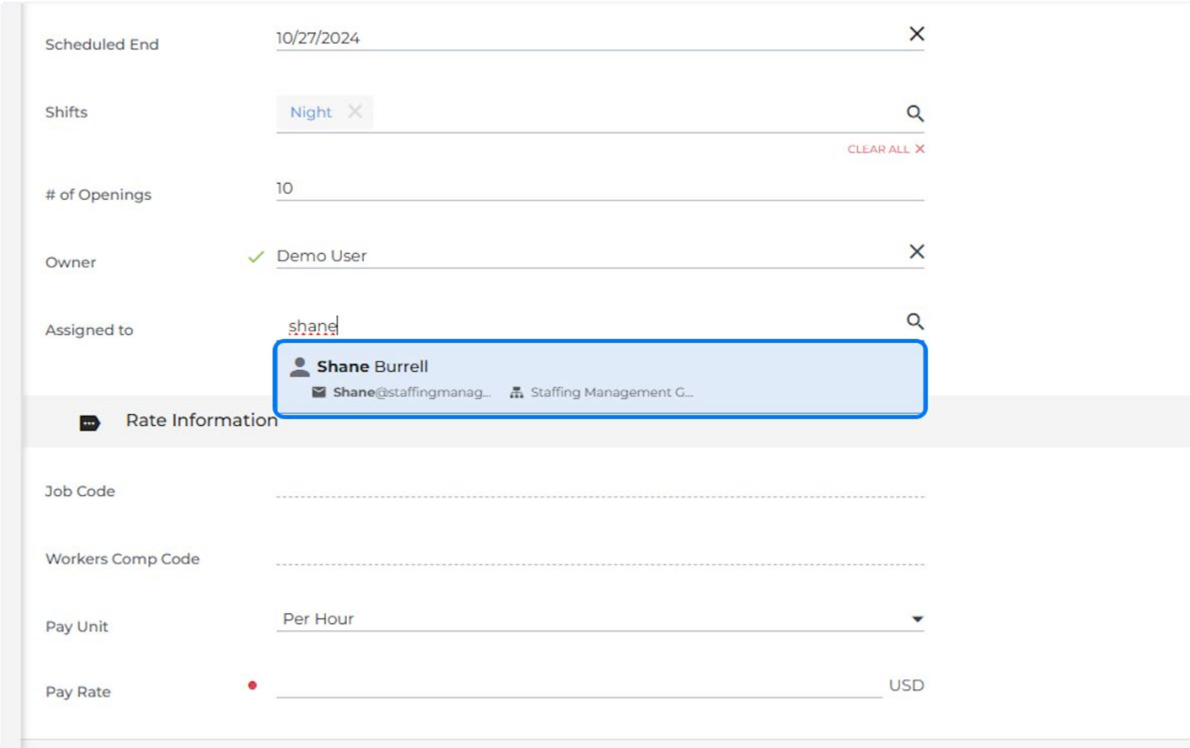


16. Enter the number of open positions for the job order.

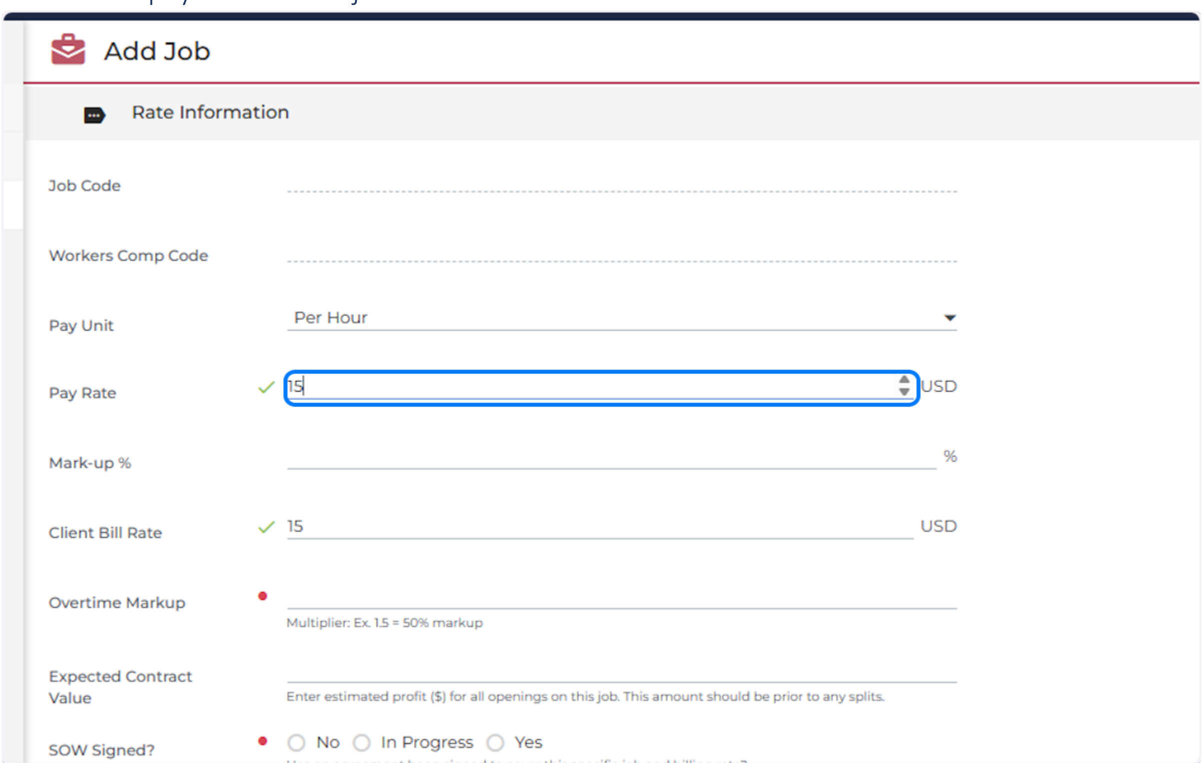
Note: You can exceed this limit without any issues, if necessary.



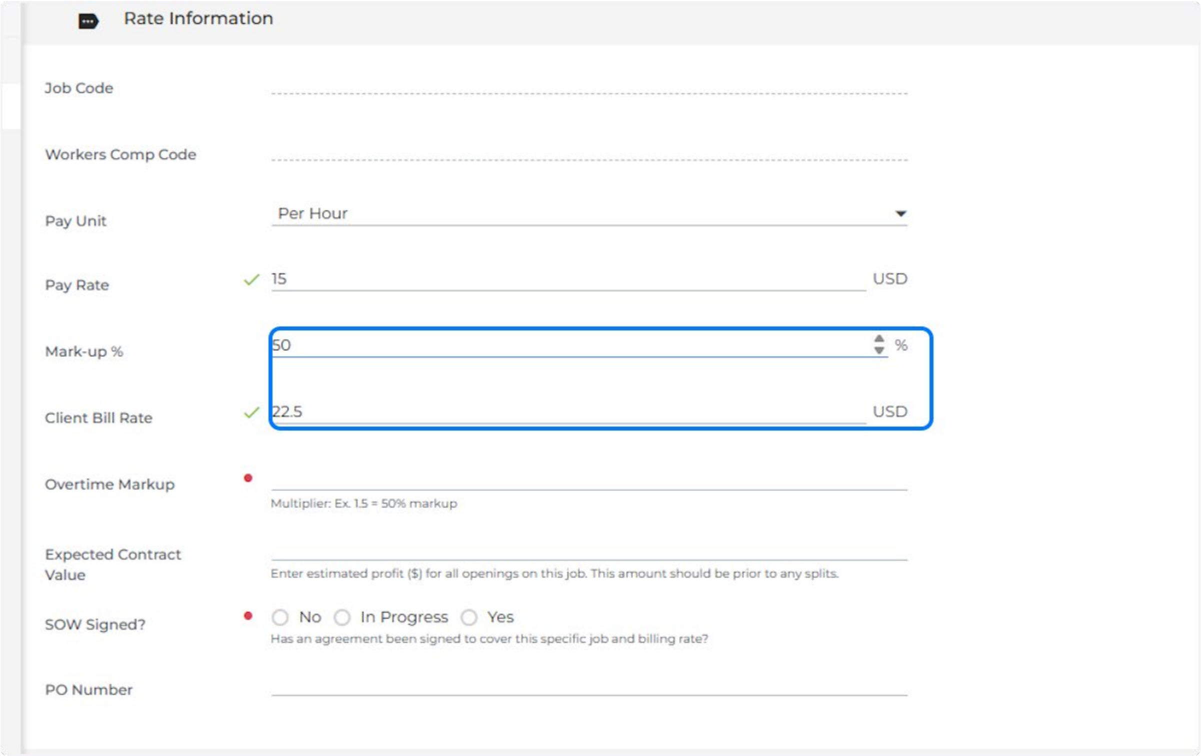
17. You can assign a job to another user from your team, if necessary.



18. Enter a pay rate for the job.

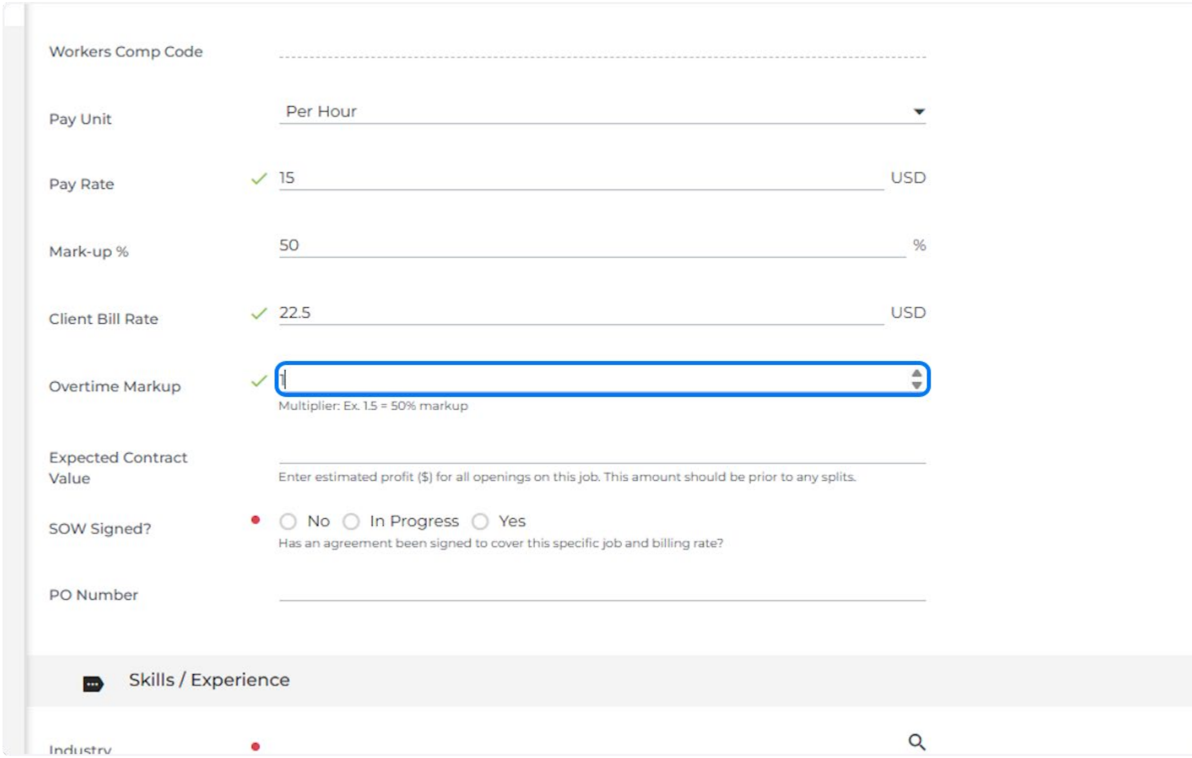


19. Enter either a mark-up % (which will automatically calculate the bill rate) or enter a bill rate $ amount.

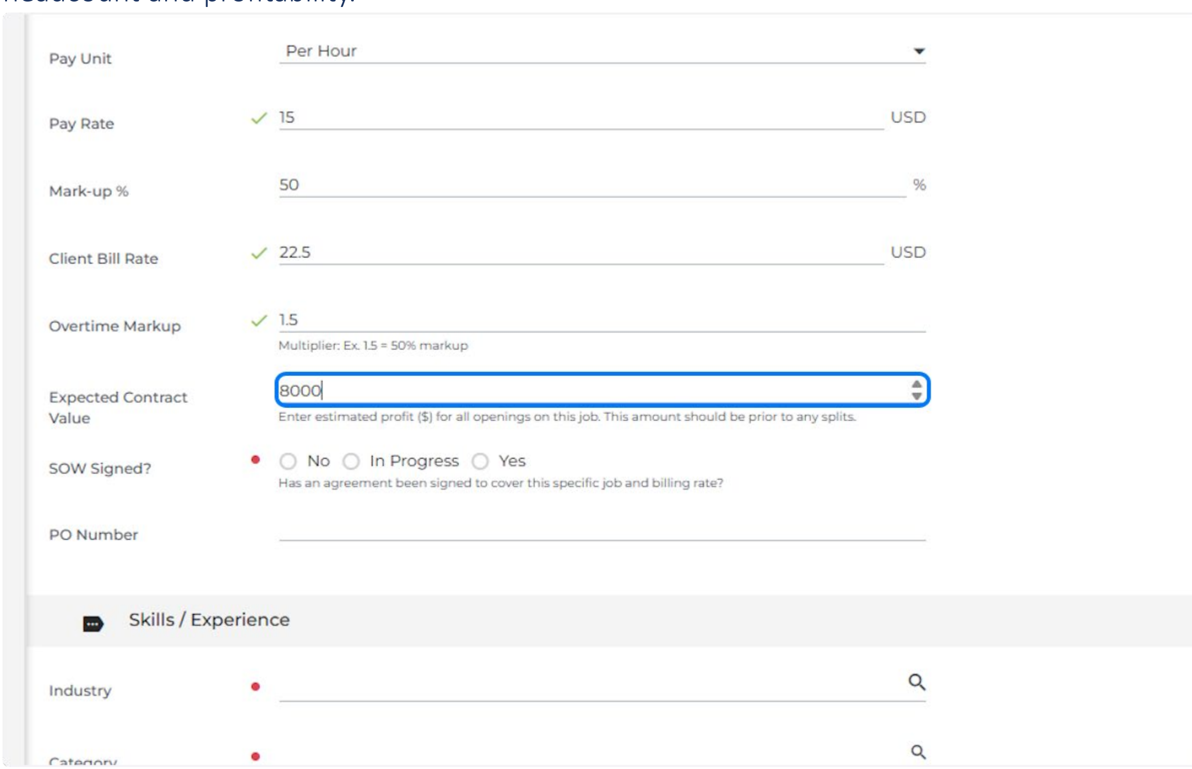


20. Enter this pay overtime multiplier amount.

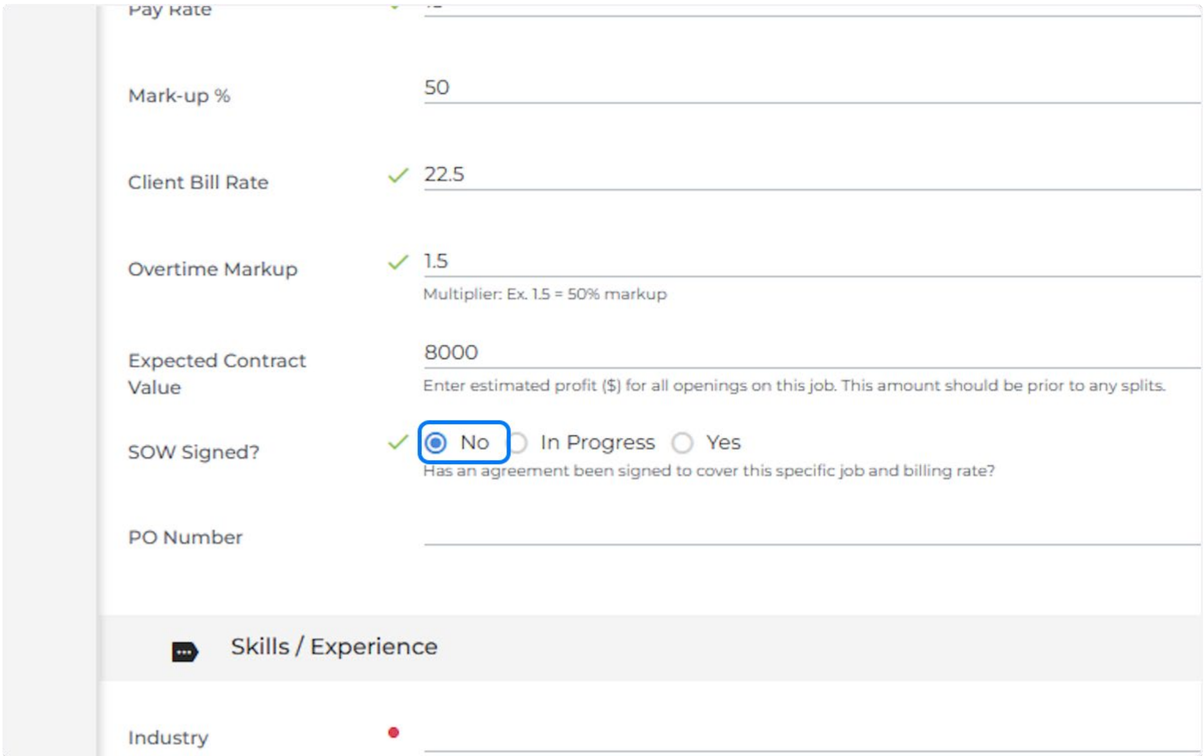
Note: This will most likely always be 1.5



21. Enter the amount you expect or would like to profit for the job order, based on the estimated headcount and profitability.

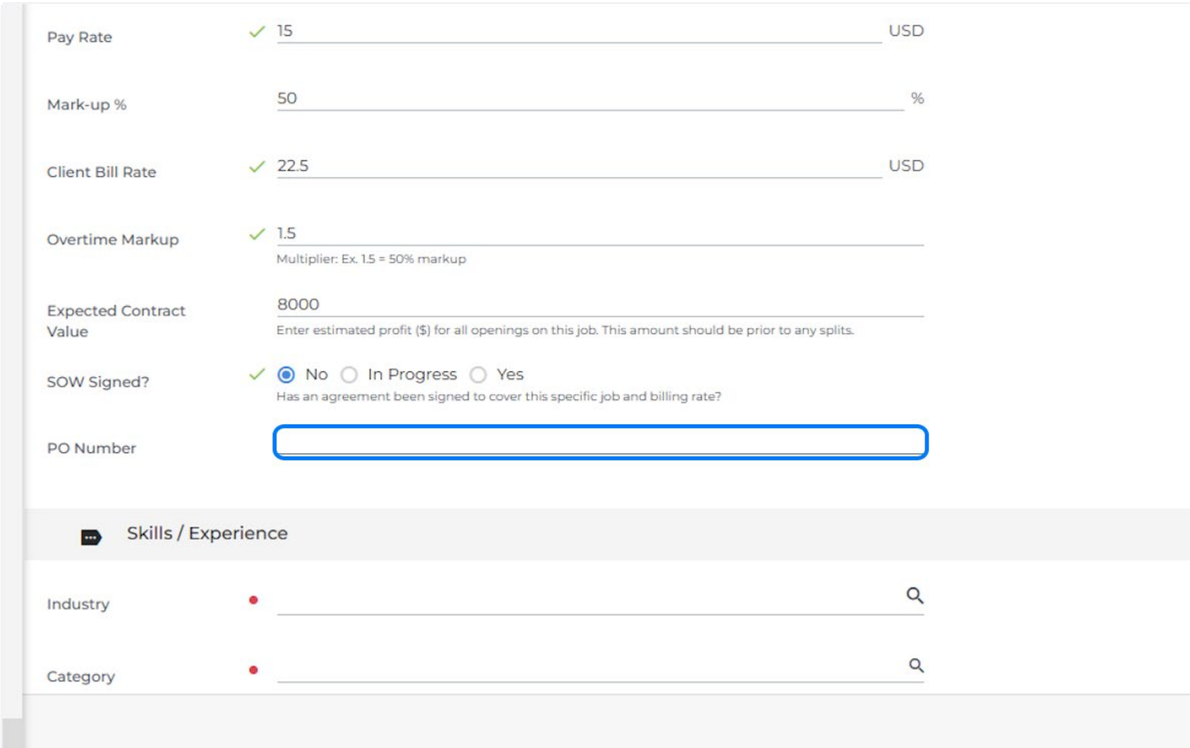


22. Select whether an SOW has been signed for the role.

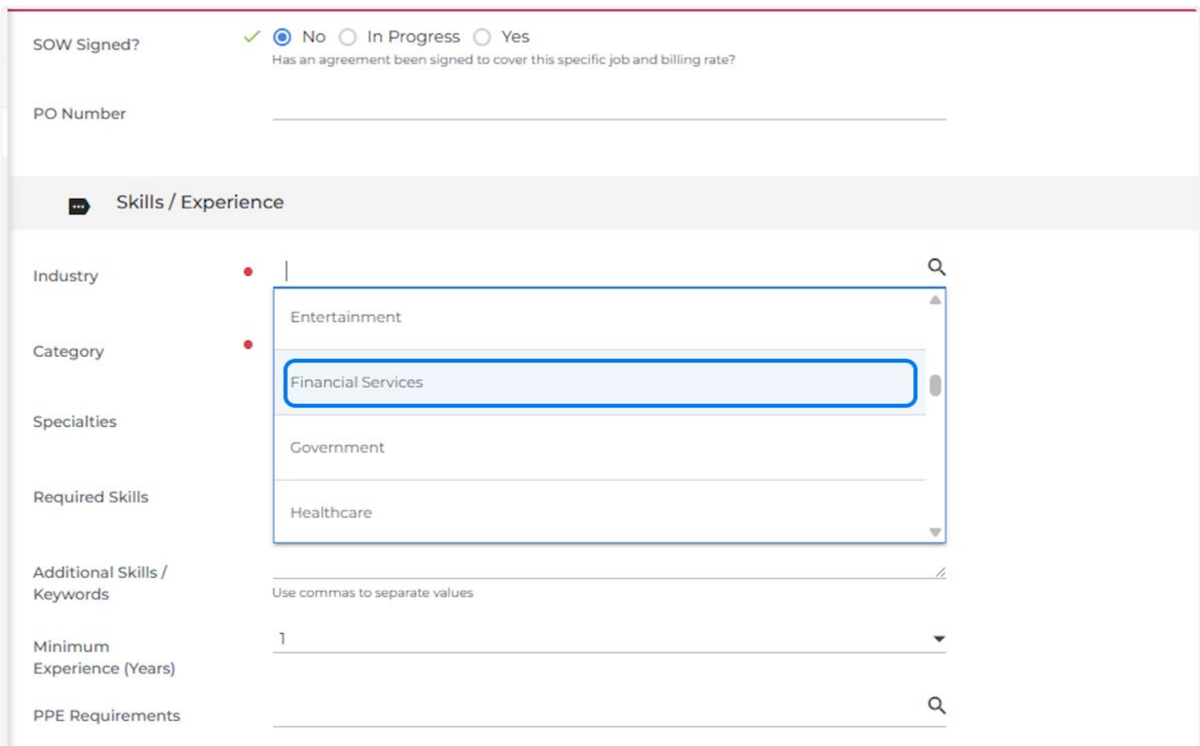


23. Enter a PO Number, if applicable.

Note: The PO # on a job order will carry over to the placements PO # field, but can be added to the placement individually as well.

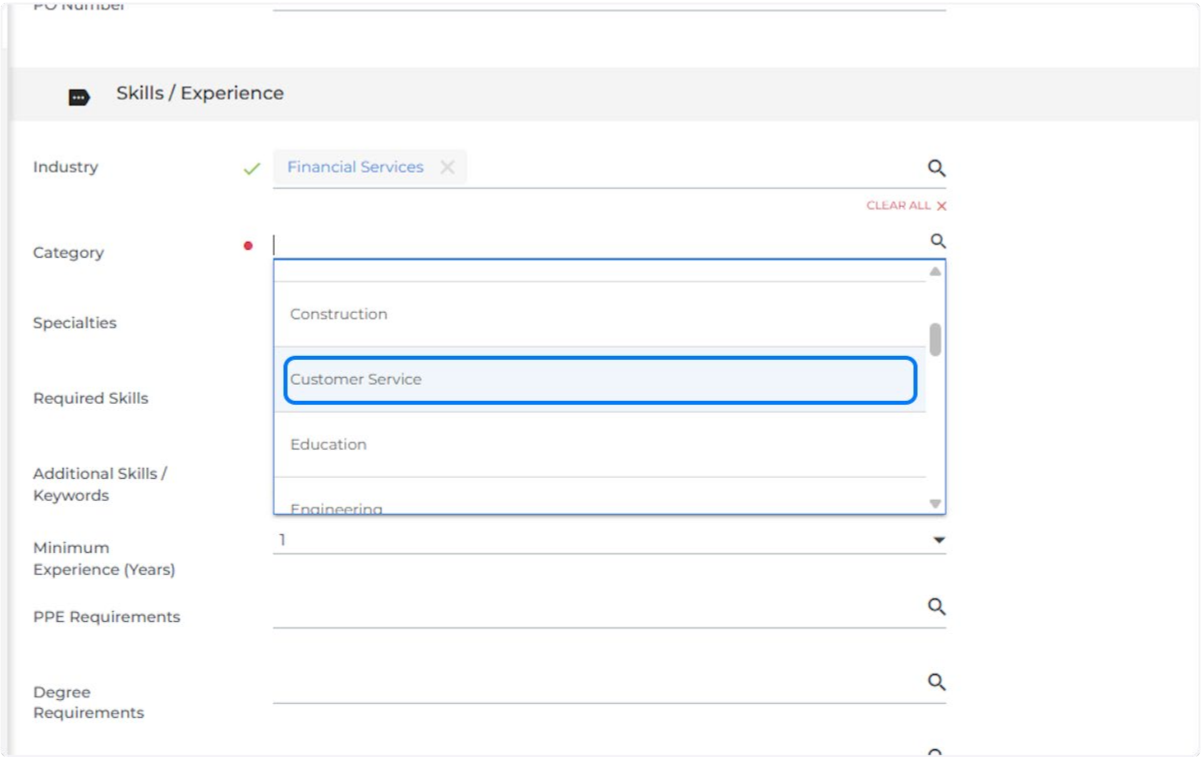


24. Select an Industry that this job applies to.



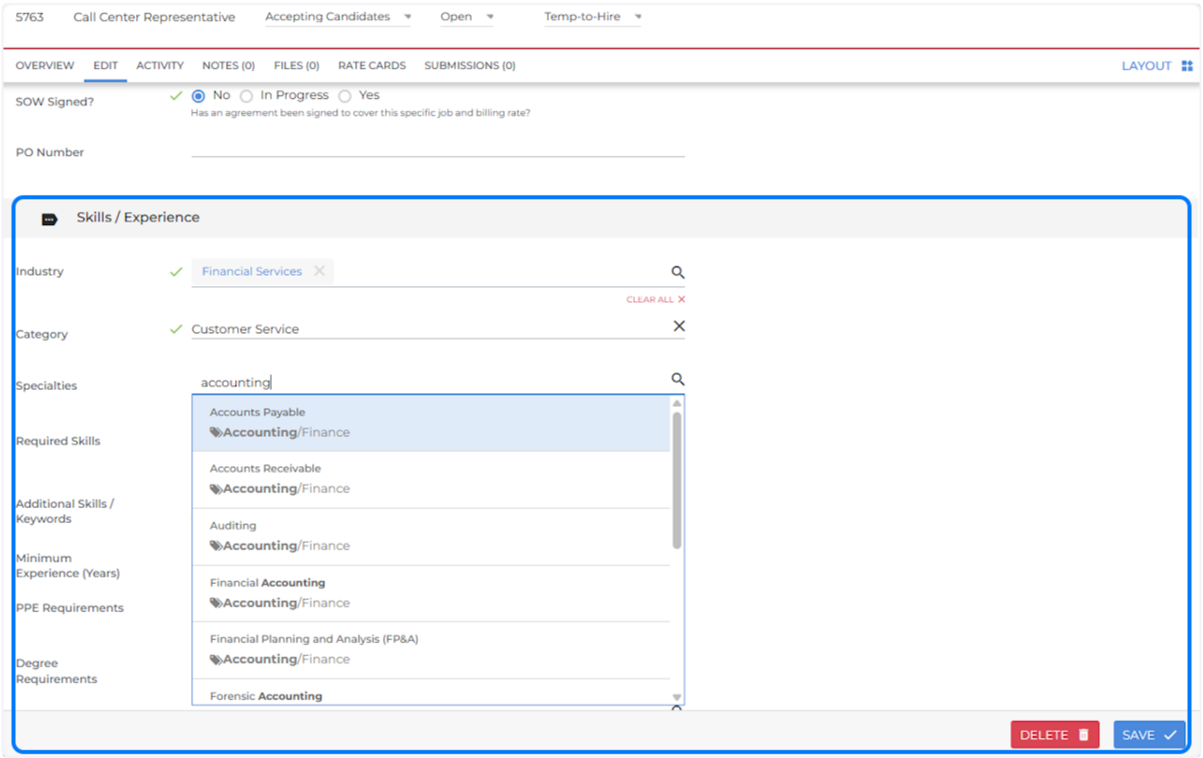
25. Select any categories that this job applies to.

Note: If you do not see a category that you need to use but is not available, please contact our IT support team.



26. Select any specialties that may apply to the job.

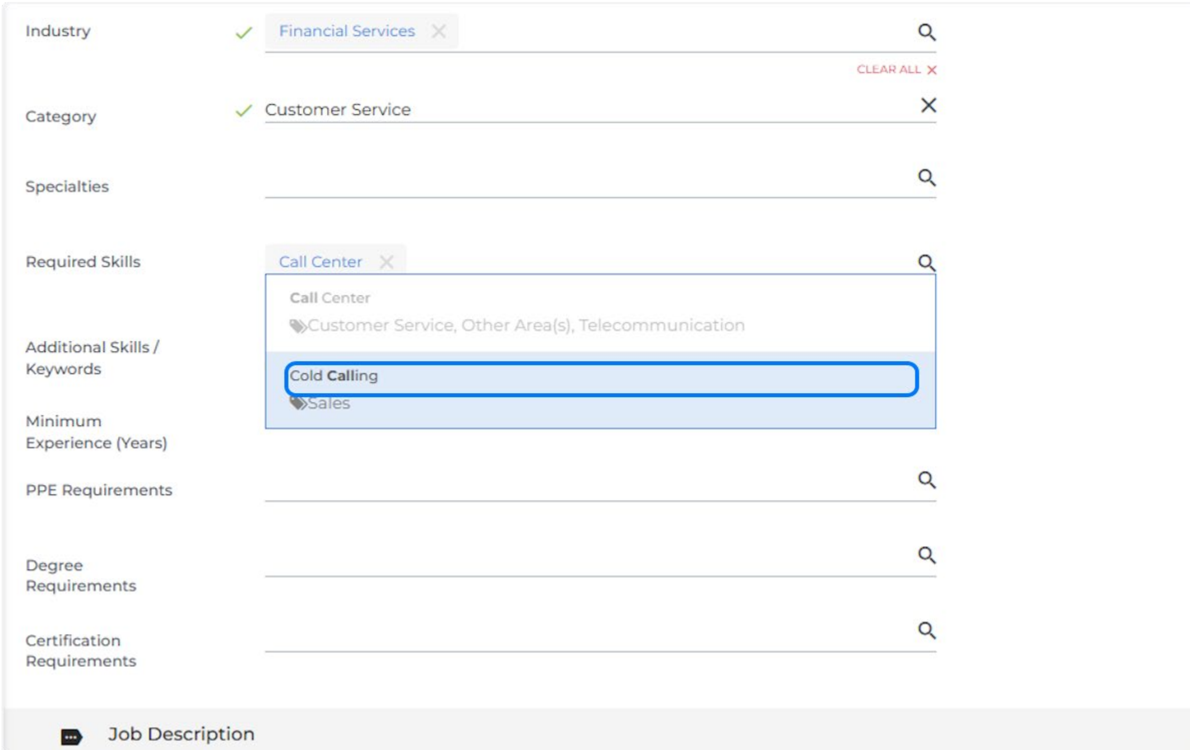
Note: Specialties are related to the category and can be searched easily by entering the category name in the specialties field. This will populate all specialty associated with the category. If you do not see a specialty that you need to use, please contact our IT support team.



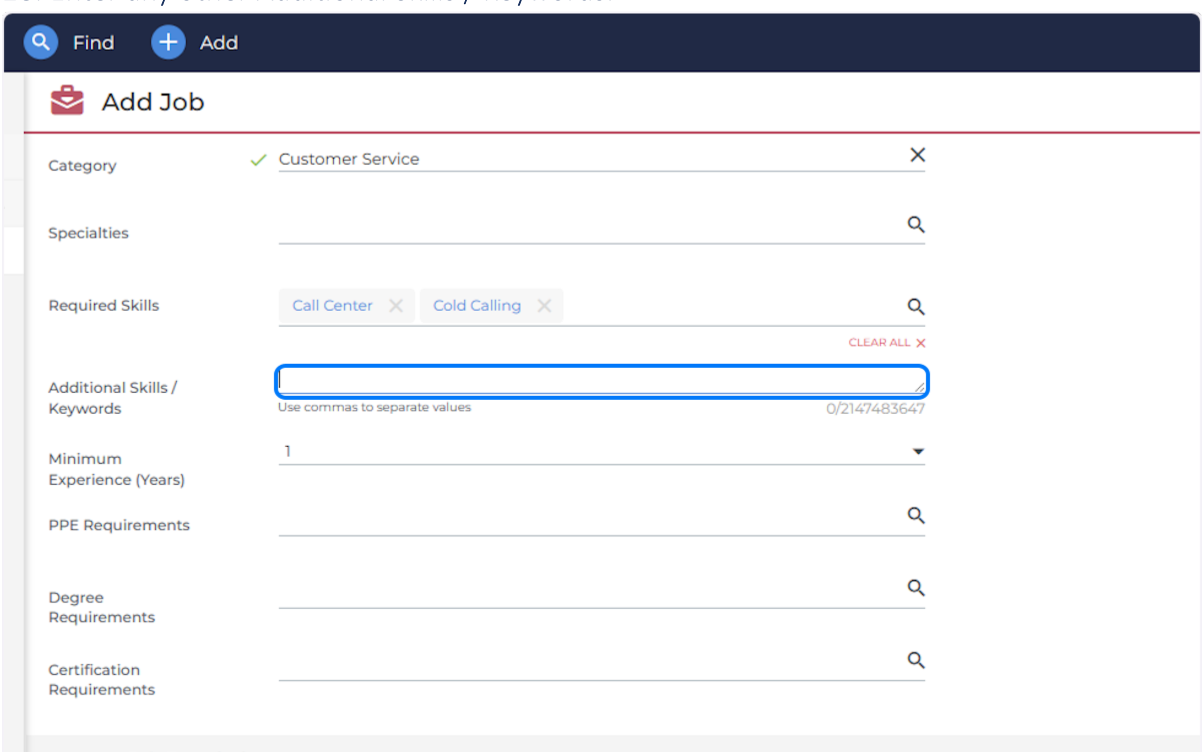
27. Select any skills that apply to the job order and are required for a candidate to have.

Note: Similar to Specialties, skill are related to the category and can be searched easily by entering the category name in the skills field. This will populate all specialty associated with the category. If you do not see a specialty that you need to use, please contact our IT support team.

Having skills included on the job order will allow for custom automations, Ai, and auto-matching to occur within the systems. You can also use those fields to do an advanced search within your candidate databased. Otherwise, you will need to do a lot more manual searching.

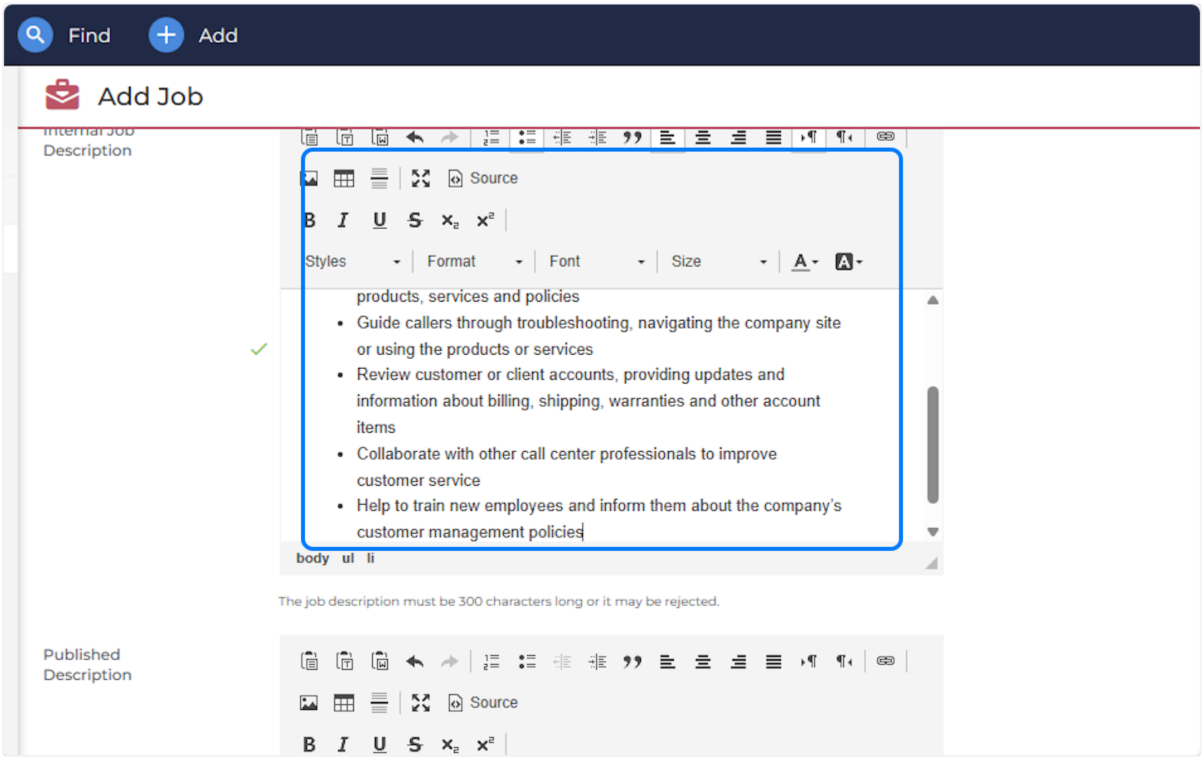


28. Enter any other Additional Skills / Keywords.

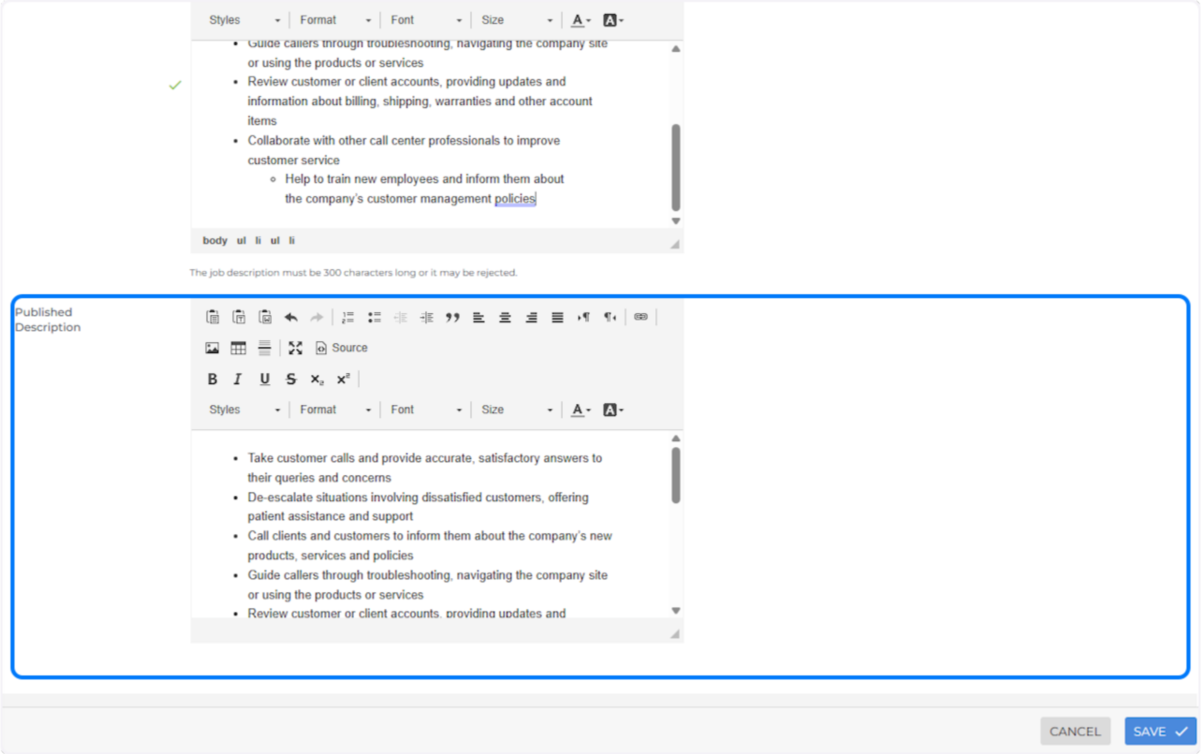


29. Enter a detailed job description in the Internal Job description section.

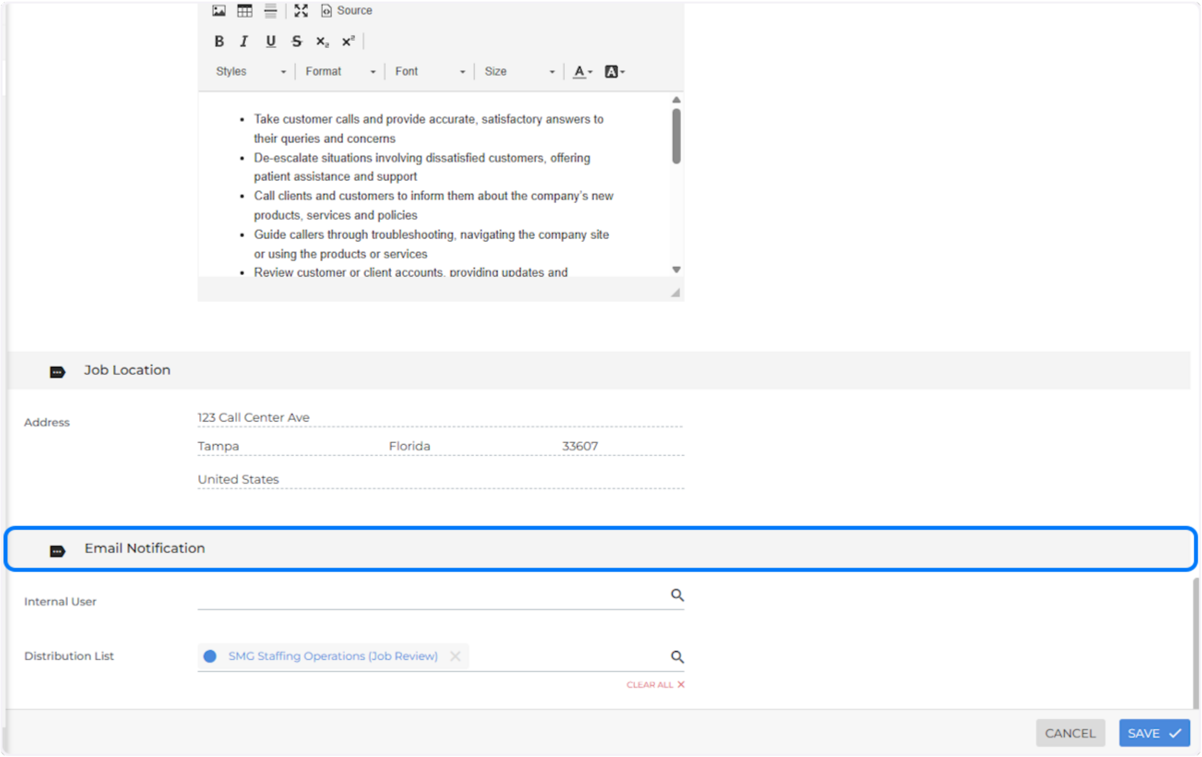
Note: Having a descriptive job description with keywords, skills and at least 300 characters will allow you to take advantage of Bullhorns auto matching capabilities and casts a much larger net to target audiences.



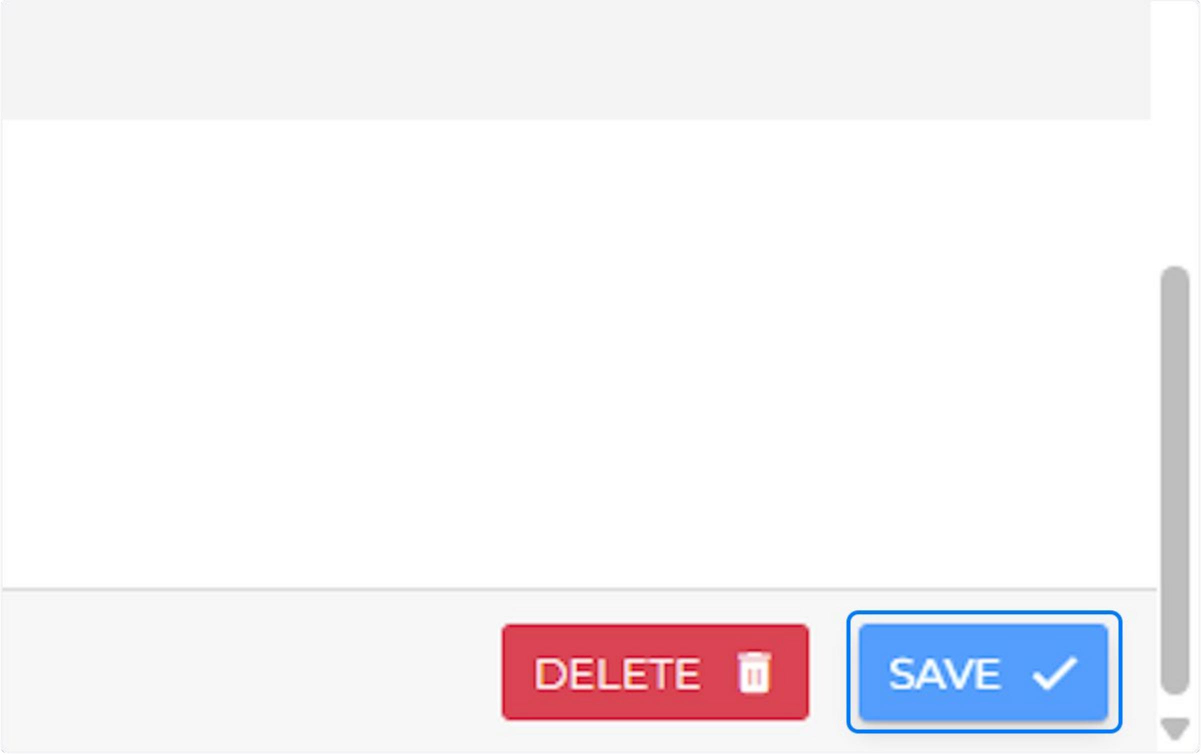
30. Remove any unwanted wording in the Published Description, which will automatically generate once an Internal Job Description is created. This is the job descriptions that will be posted to the public job boards.



31. Add any specific users to receive an Email Notification in the internal users field.



32. Click on SAVE



Now a back office team member will need to review the job order and make sure a worker's comp code is properly added, otherwise a placement will not be able to be made from the job.

Adding a Rate Card

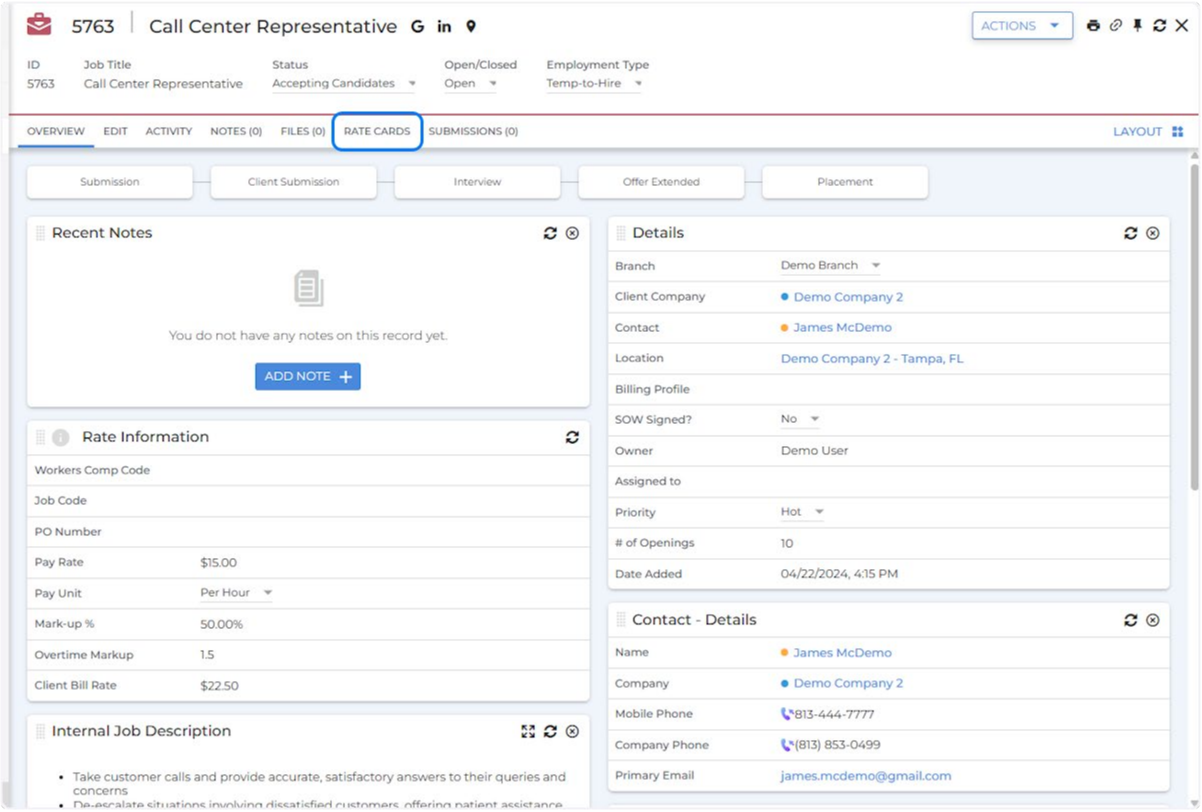
Rate cards can be added under the *Job Rate Card* tab. Each Job can have only one rate card.

Jobs that do not have a rate card yet will show a blank state when looking at the *Rate Card* tab.

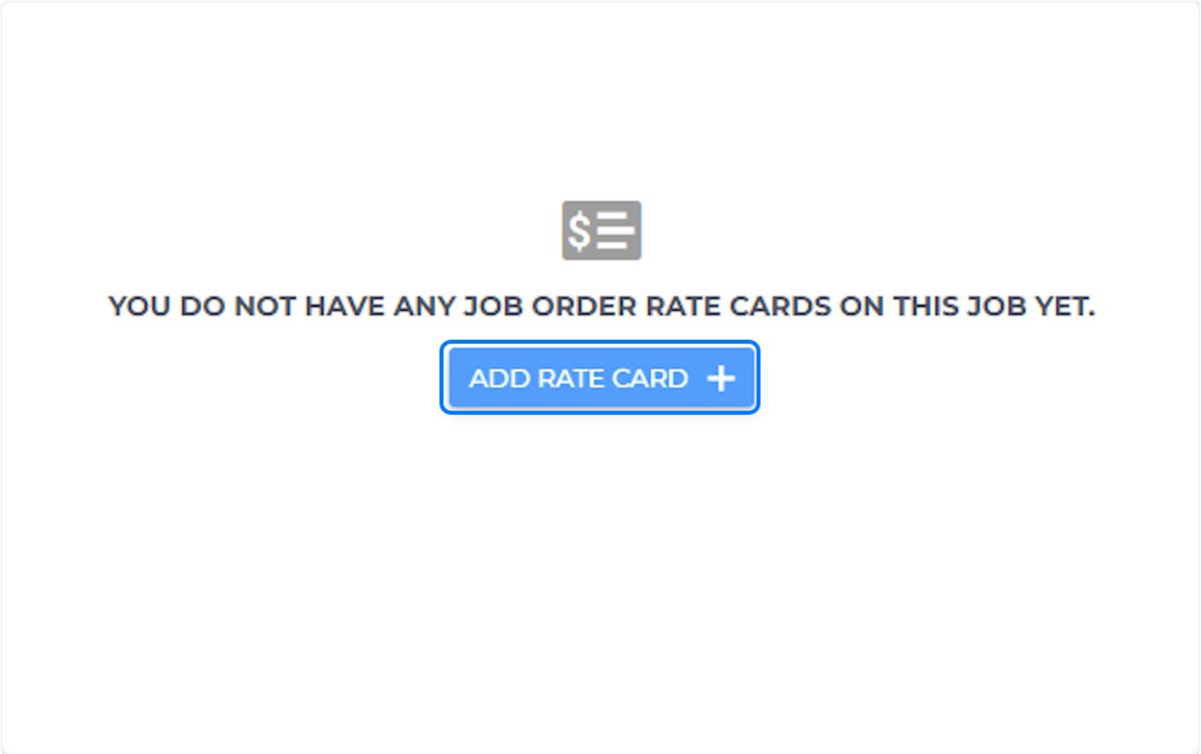
When adding a job rate card:

- No fields are required.
- Each earn code can be used only once per job rate card version.
- If the system setting *defaultEarnCodeGroup* is populated with a reference to an earn code group, the system will automatically populate the first rate card line group and appropriate rate card lines based on the default earn code. This setting is optional and users can manually enter all rate card lines.
- If you select an earn code that is associated with an earn code group that accrues overtime, two additional rate lines will appear, populated with the overtime and double time earn codes. You must enter all 3 rates.

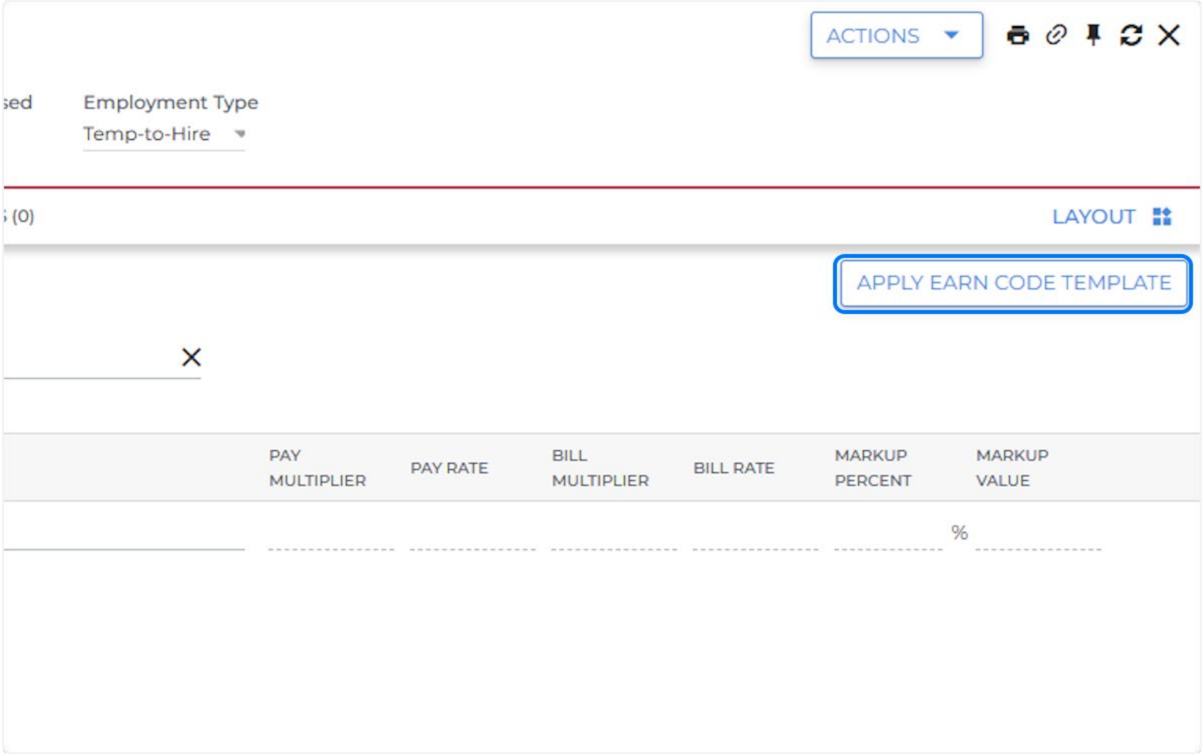
33. Click on RATE CARDS tab on a job order.



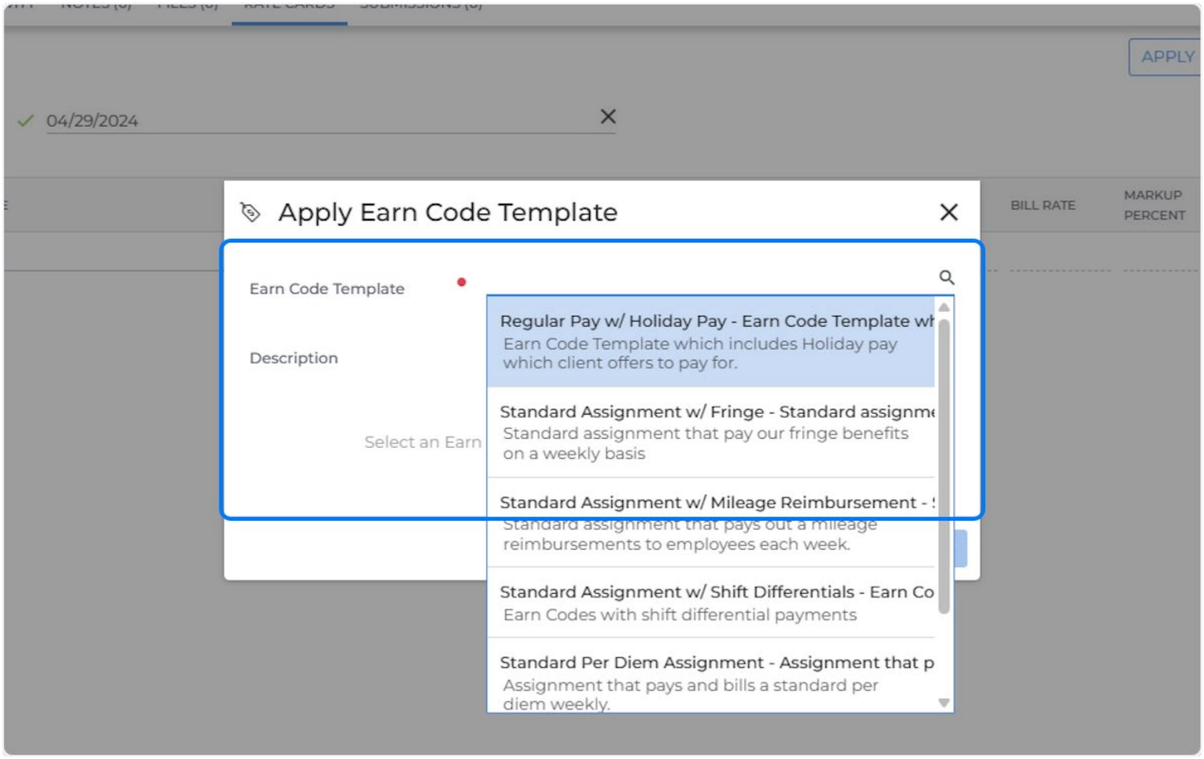
34. Click on ADD RATE CARD +.



35. You can use a template to setup a group of earn codes (Pay Code) for the job such as a travel assignment. Click on APPLY EARN CODE TEMPLATE.



36. Select an option from the drop down menu.



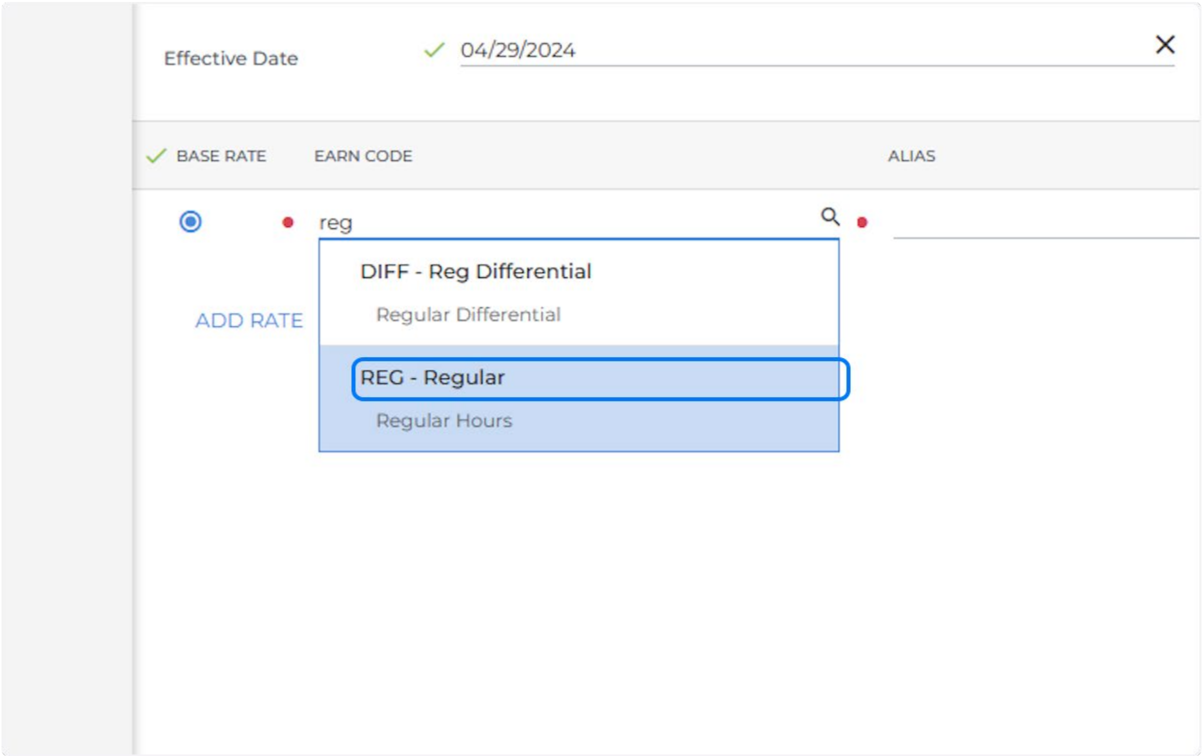
37. The primary option is to manually add the earn code manually. In the Earn Code field, search for "REG" and select the REG- Regular option.

Note: This will populate the following options.

Regular

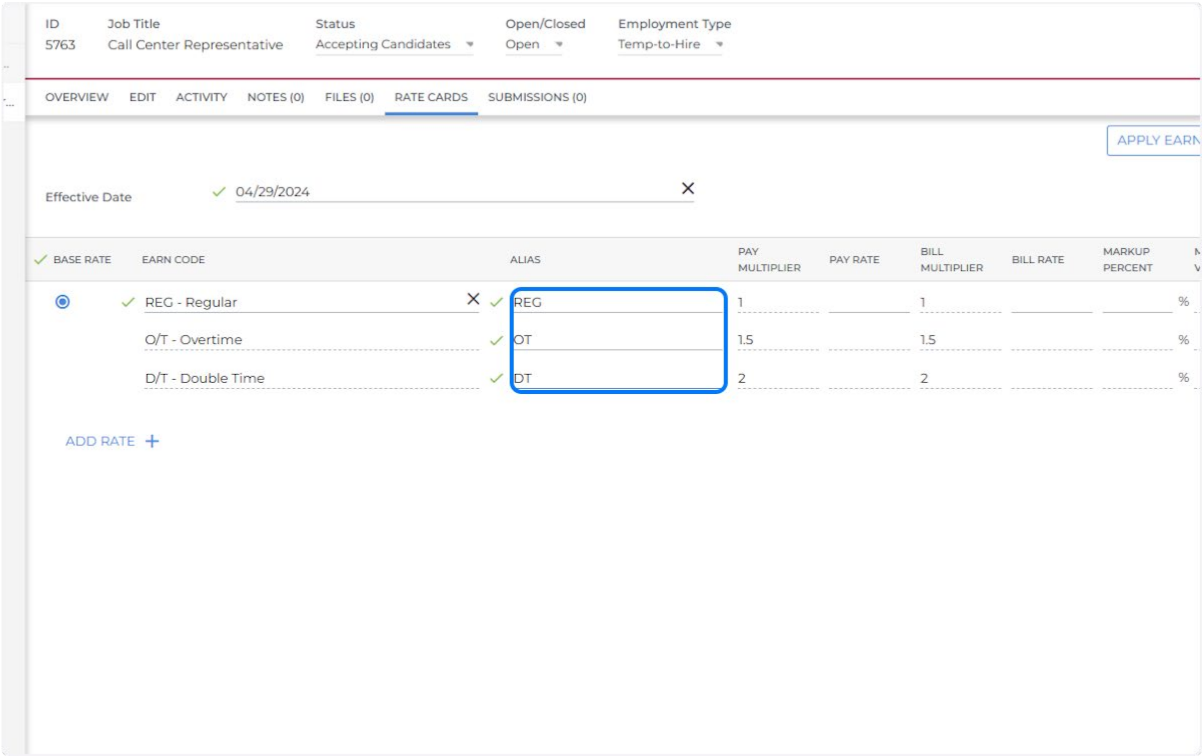
Overtime

Double Time

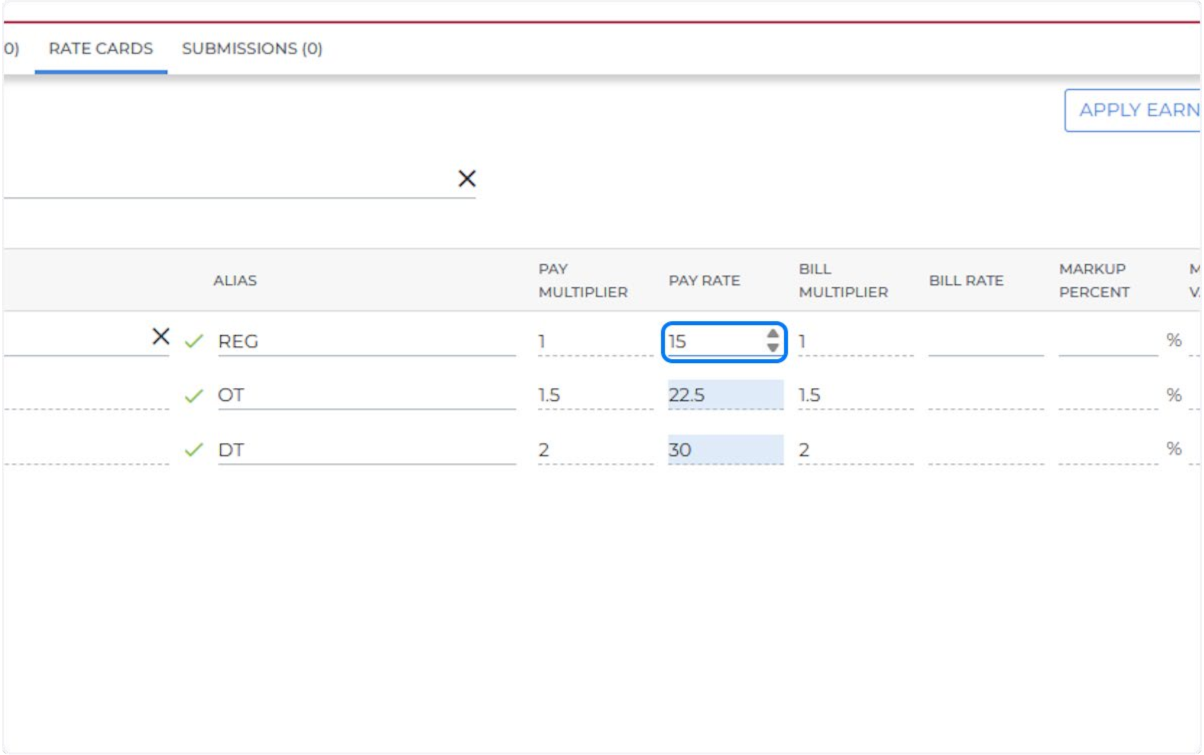


38. Enter an alias for the earn codes.

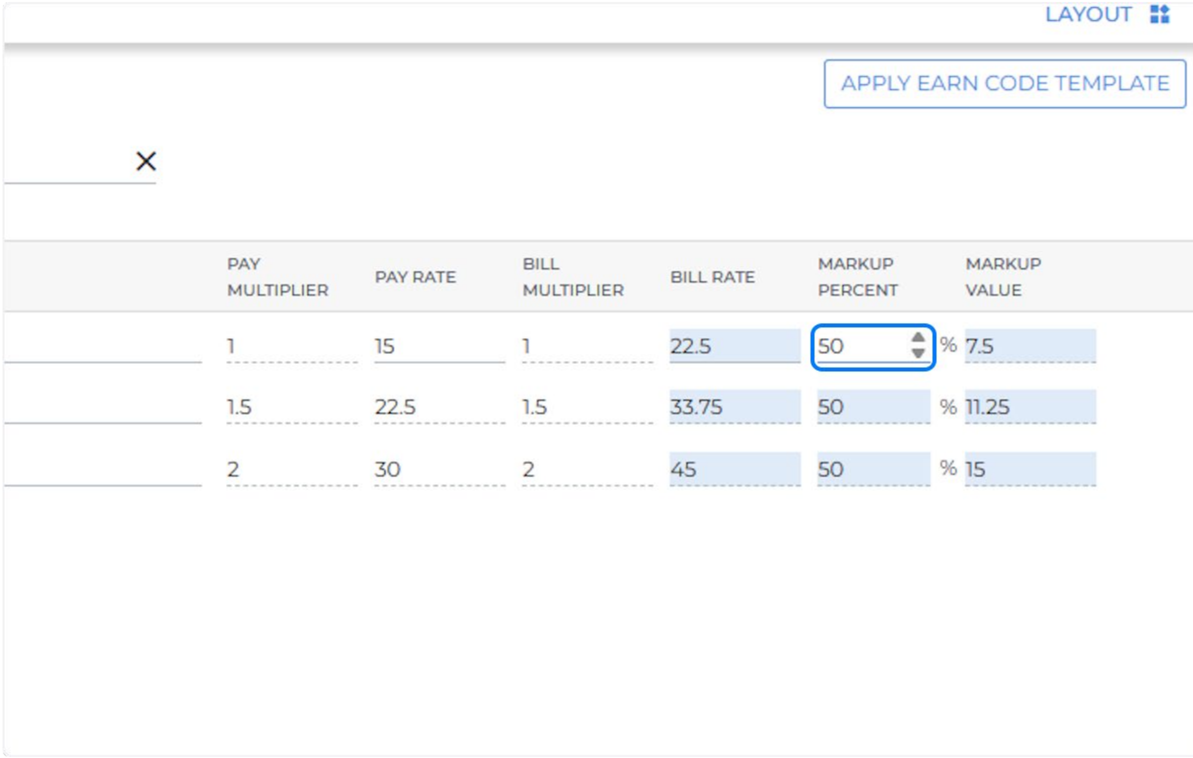
Note: An alias can be used on the time entry portal or on invoices to accommodate for client display requests.



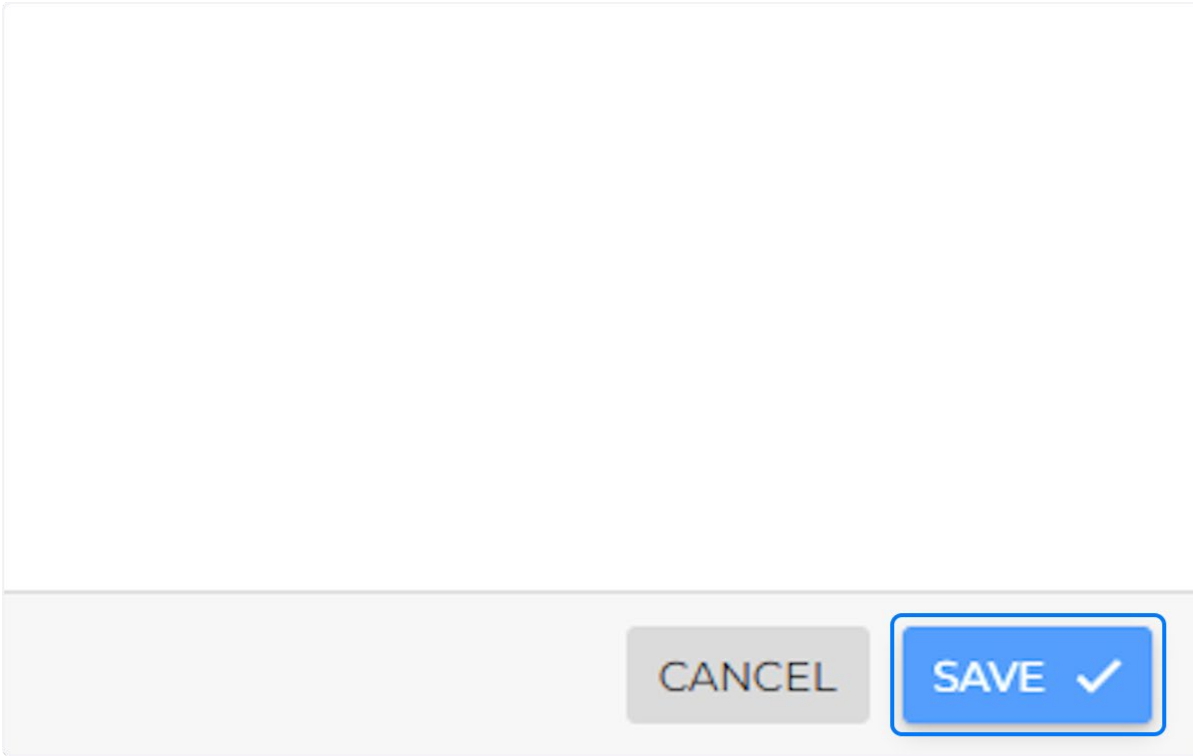
39. Enter the pay rate for the regular earn code.



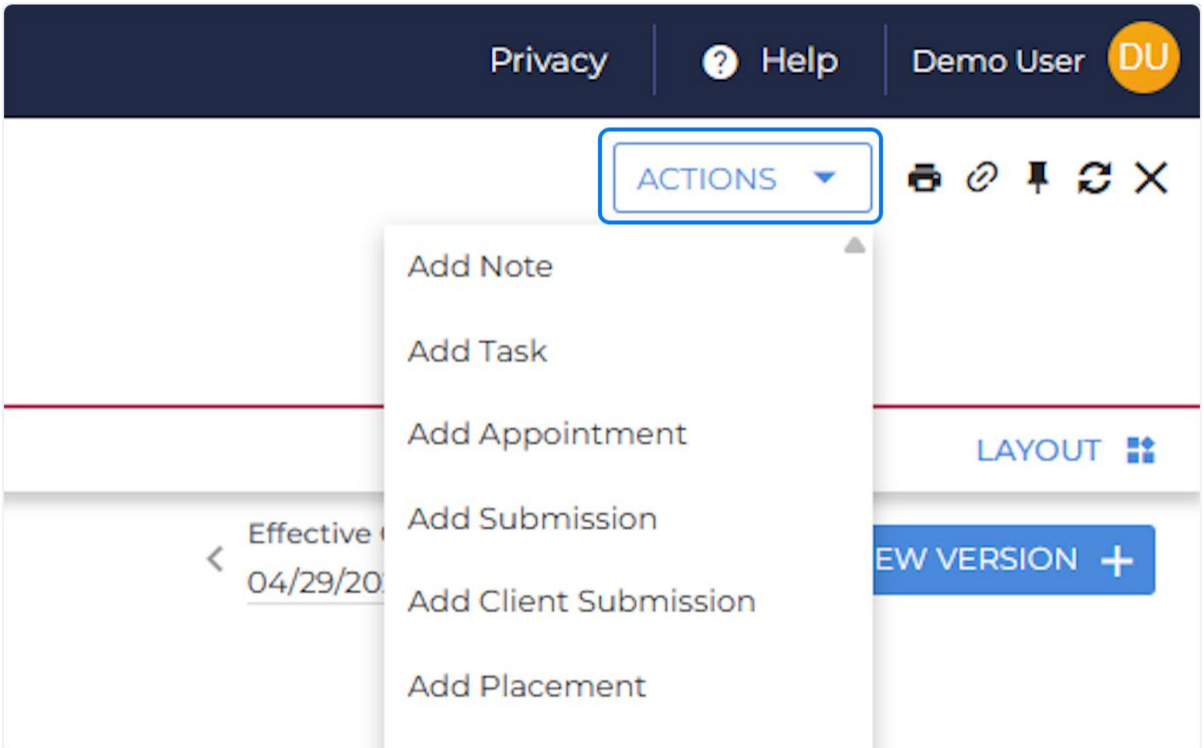
40. Enter the markup percentage (%) or manually enter the bill rates ($).

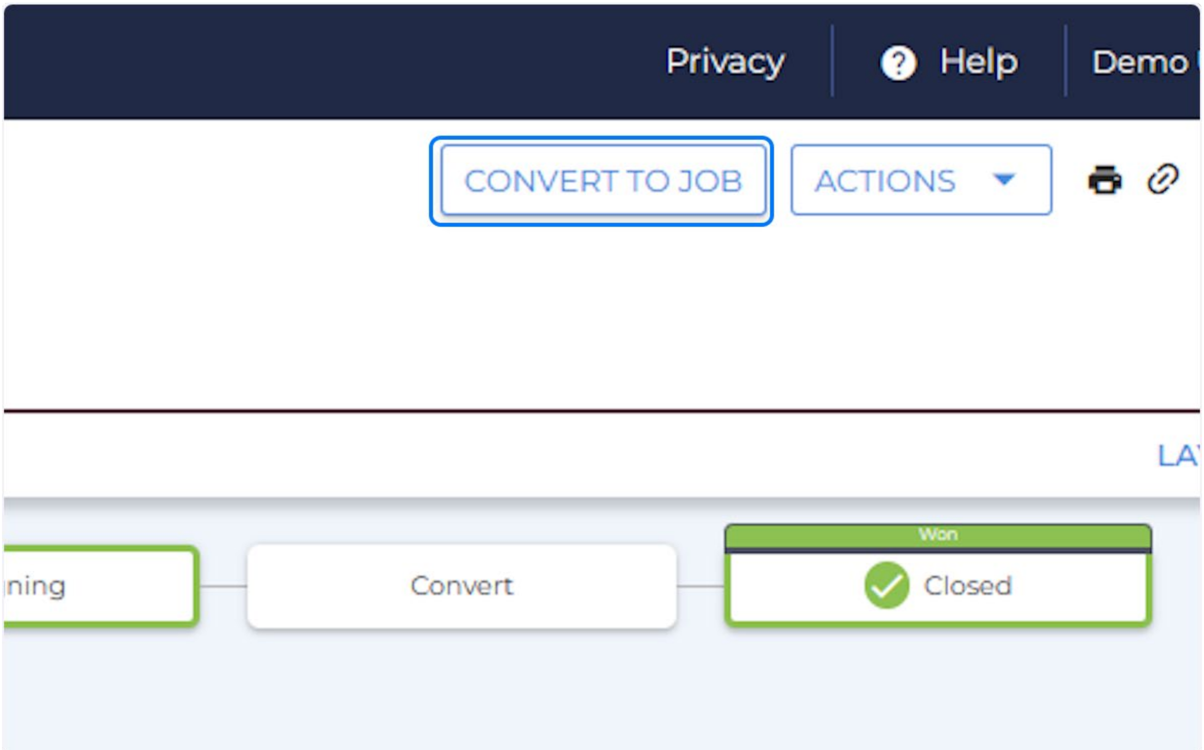


41. Click on SAVE



42. Click on the ACTIONS button and then you can take multiple actions such as adding Notes, Tasks, scheduling interviews, submitting candidates etc.

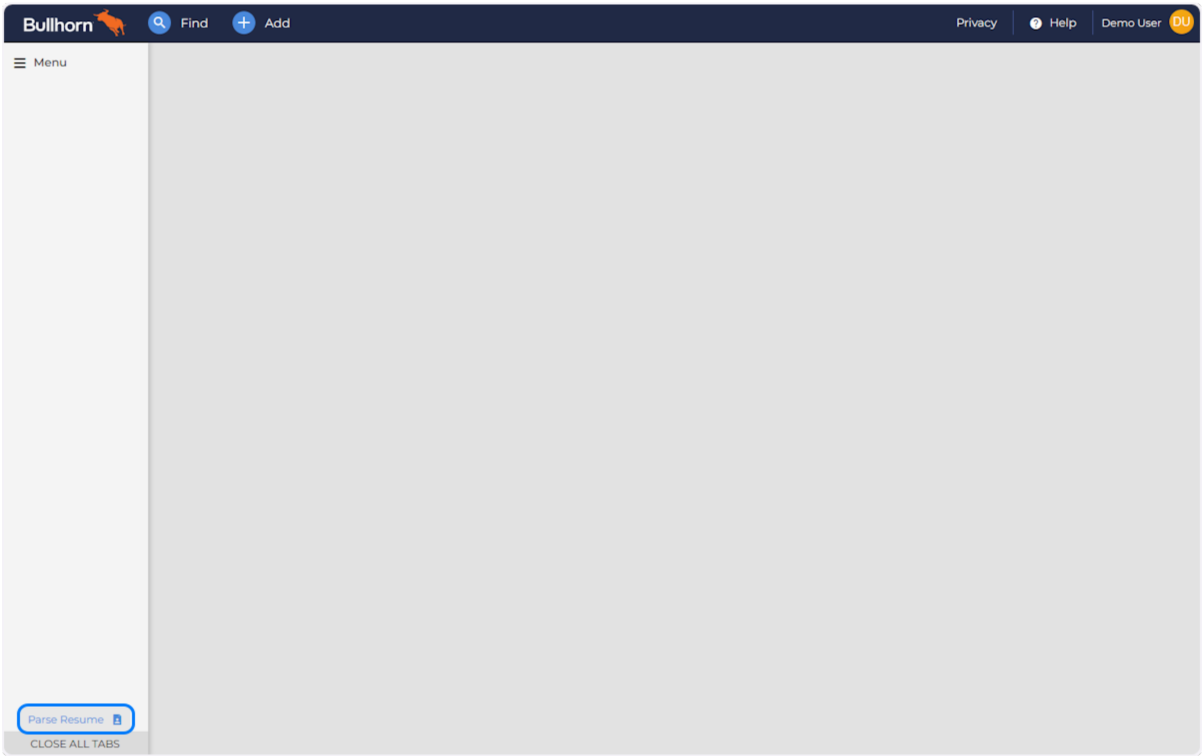



Privacy
Help
Demo
CONVERT TO JOB
ACTIONS
Convert
Won
Closed

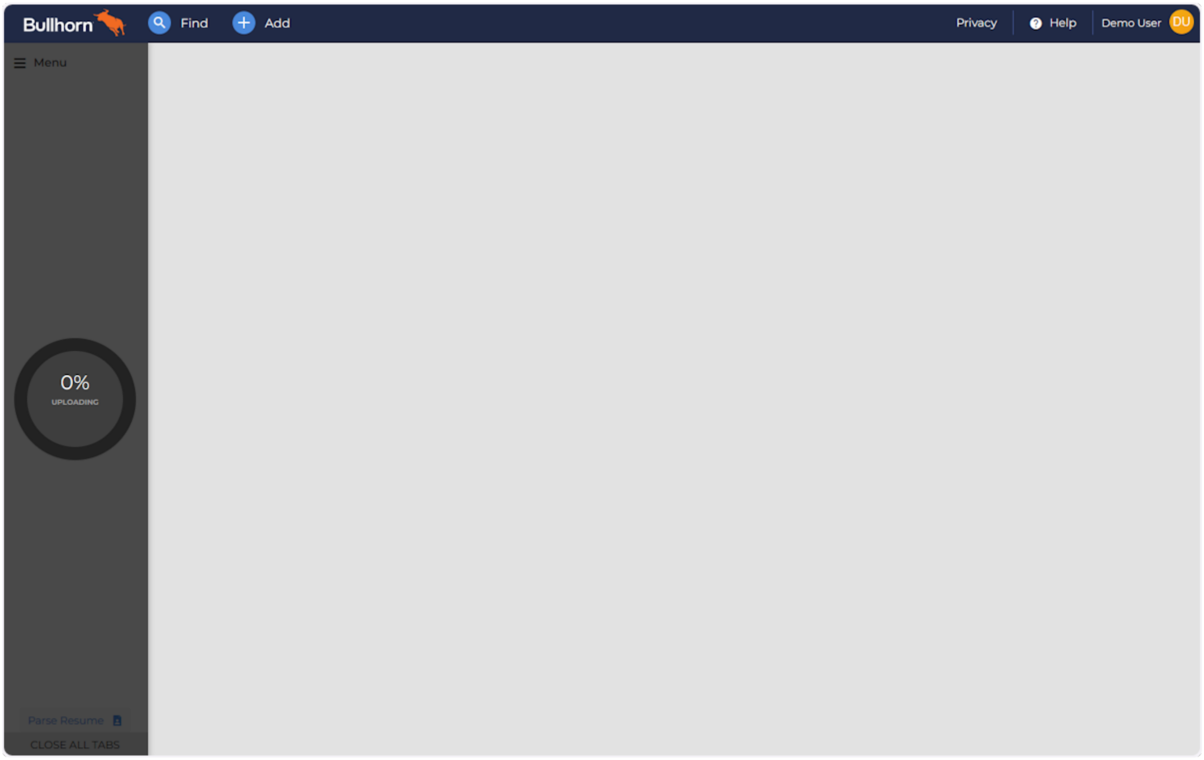
Adding a Candidate into Bullhorn

Candidates can be added into Bullhorn several ways: By parsing a resume, job board applies, added manually, orLinkedIn Recruiter integration (must have a seat under SMG's account).

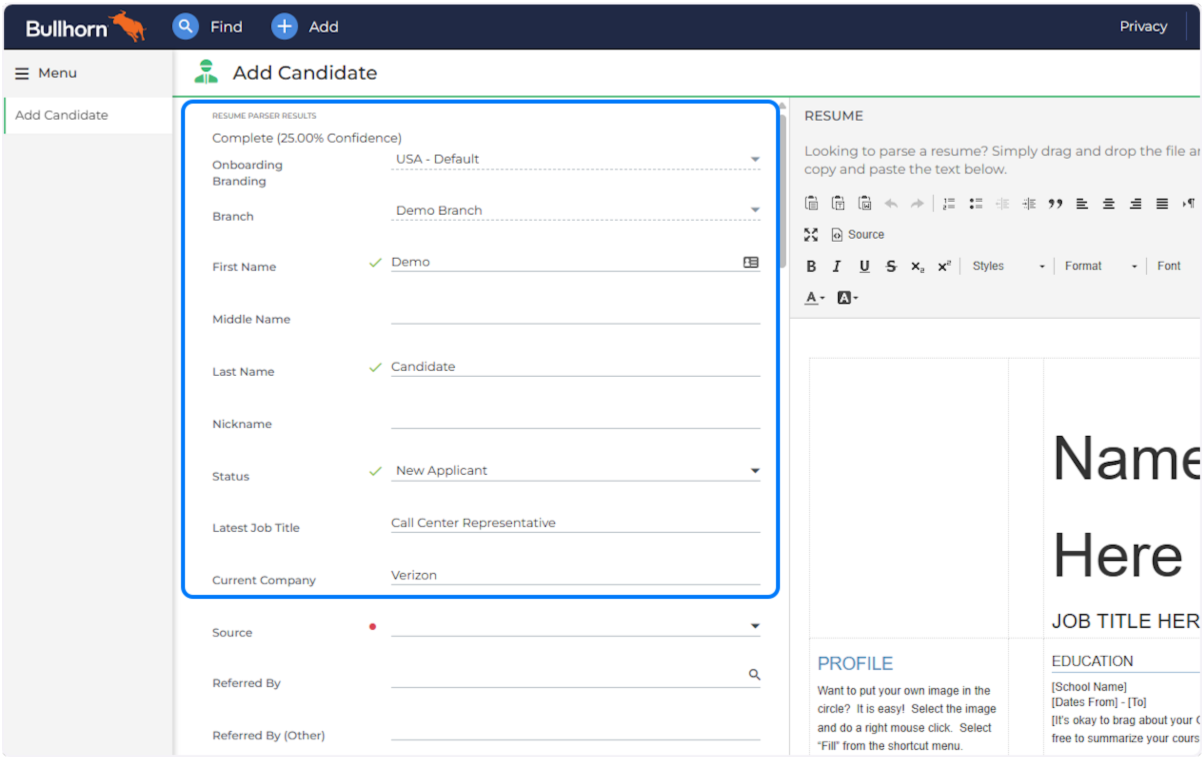
1. Click on Parse Resume



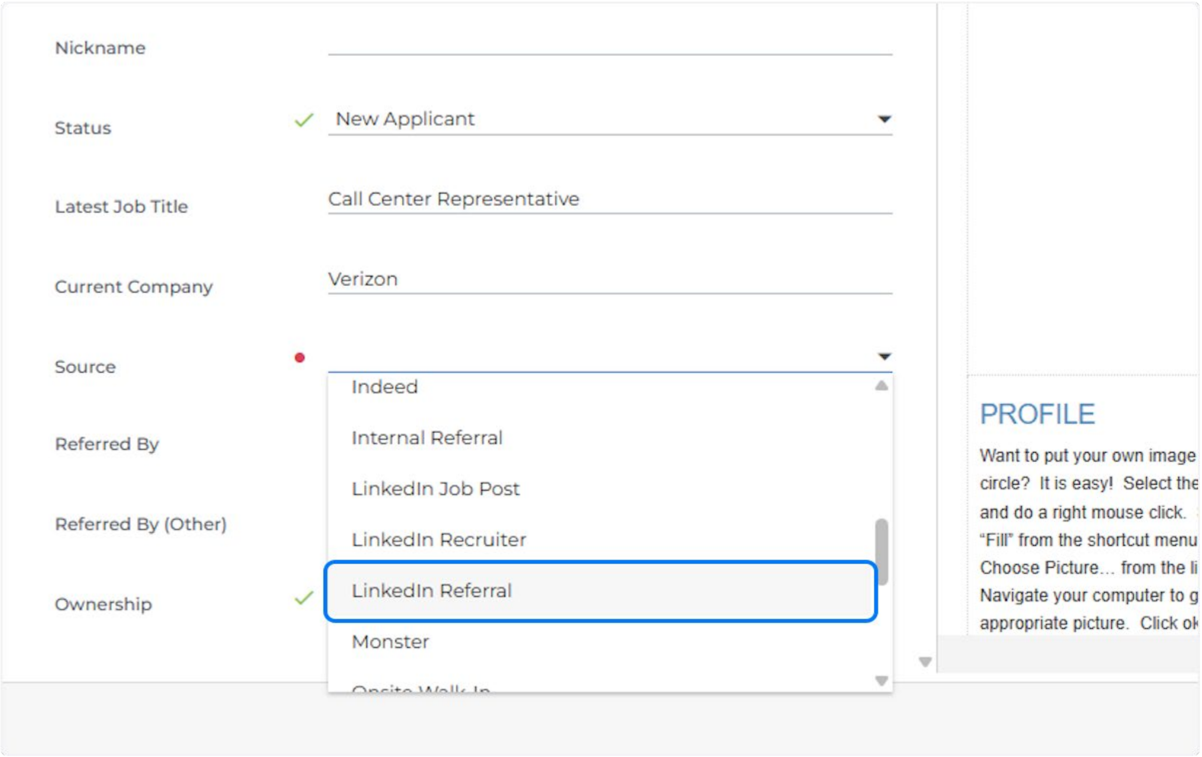
2. Select a resume file (word document or pdf) from your file explorer.



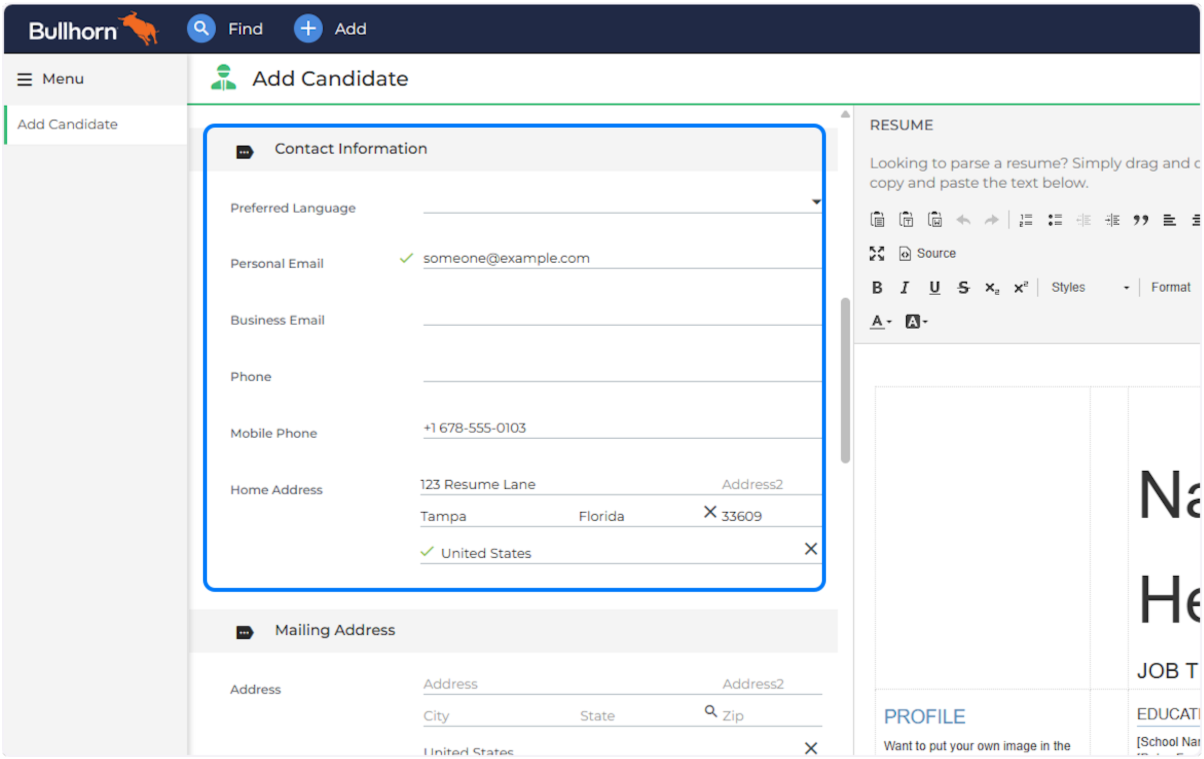
3. Depending on the resume layout, a lot of fields should be auto-filled. Complete the remaining required fields.



4. Select a source for the candidate.



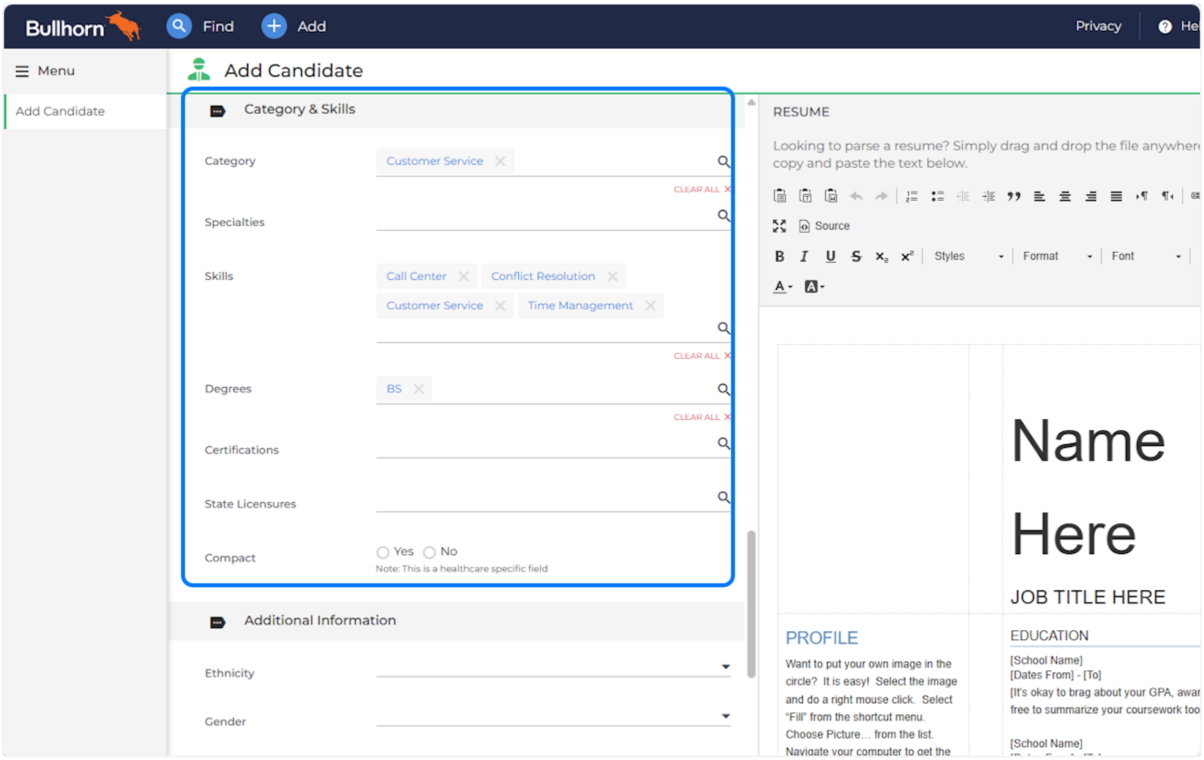
5. Confirm the contact information is completed. Requires at least a personal email address.



6. Category & Skills will auto-fill from the resume if formatted properly and they match the terms used in the system.

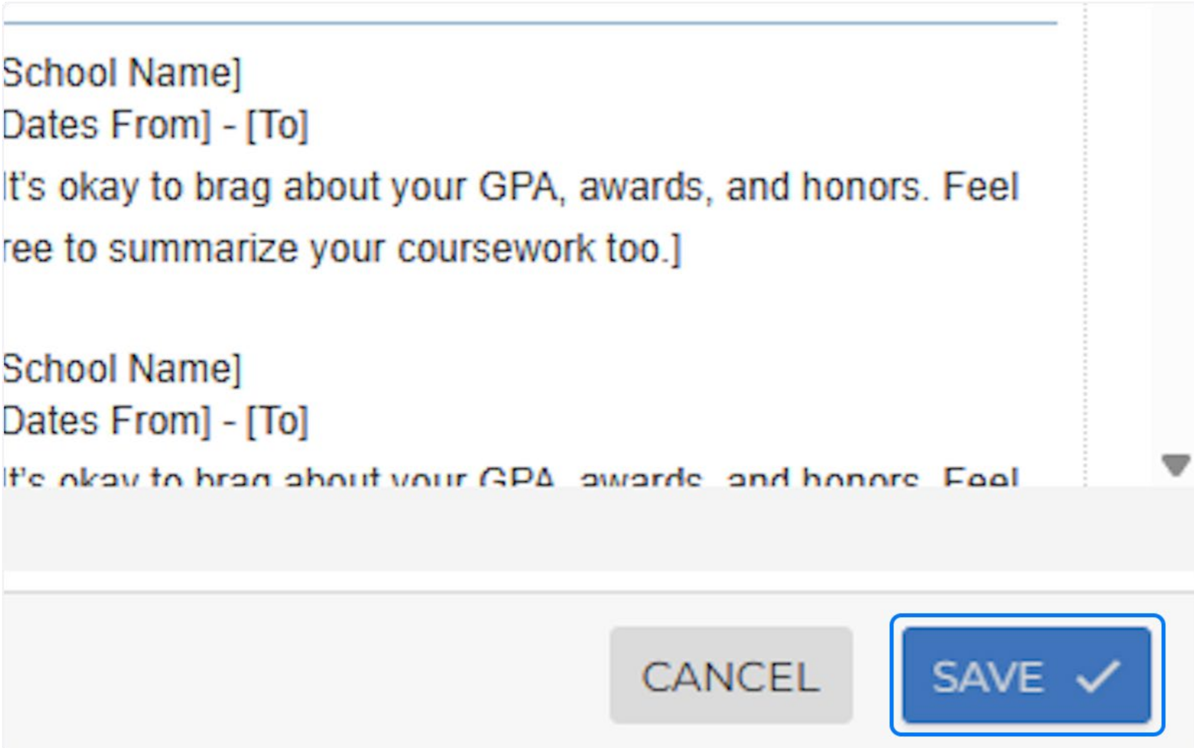
Note: If these fields are not populated from the parse, it is recommended to add the following fields for better auto-match to jobs and advanced searching.

- Categories
- Specialties
- Skills
- Certifications



A lot of these additional information/personal information fields will be completed during onboarding and are required for placements to be successful.

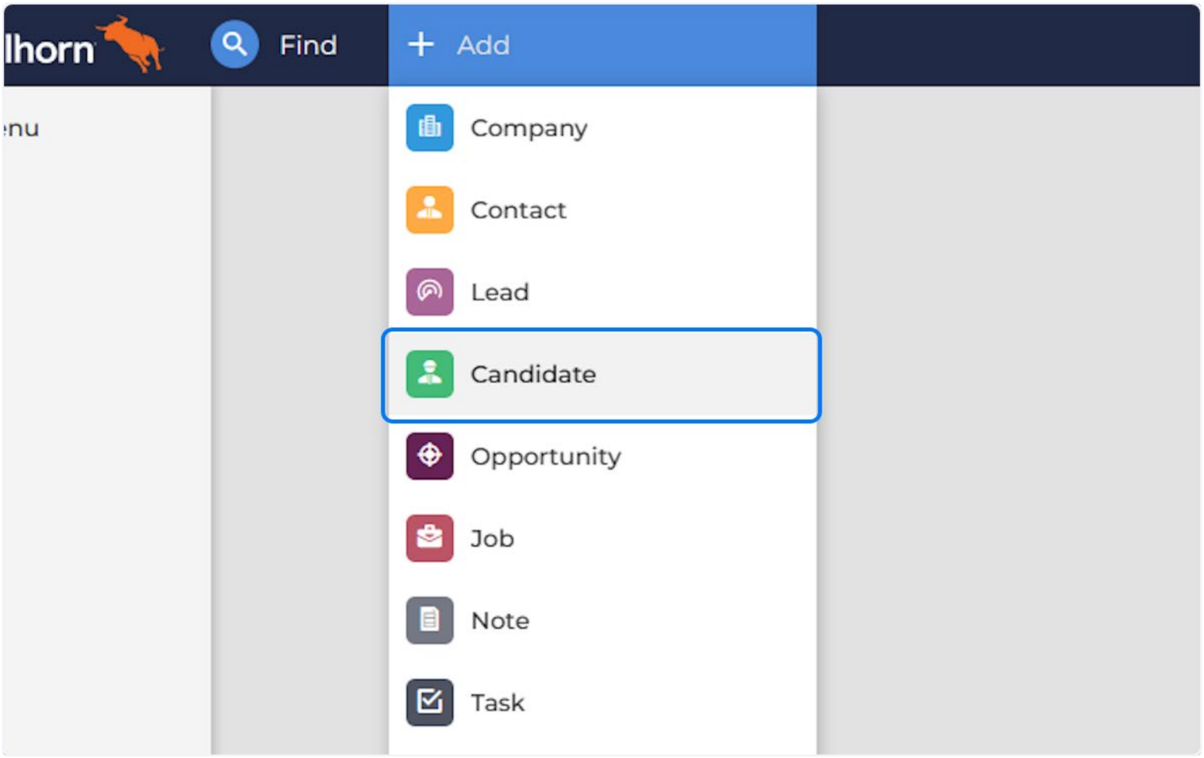
7. Click SAVE.



Manually importing a candidate

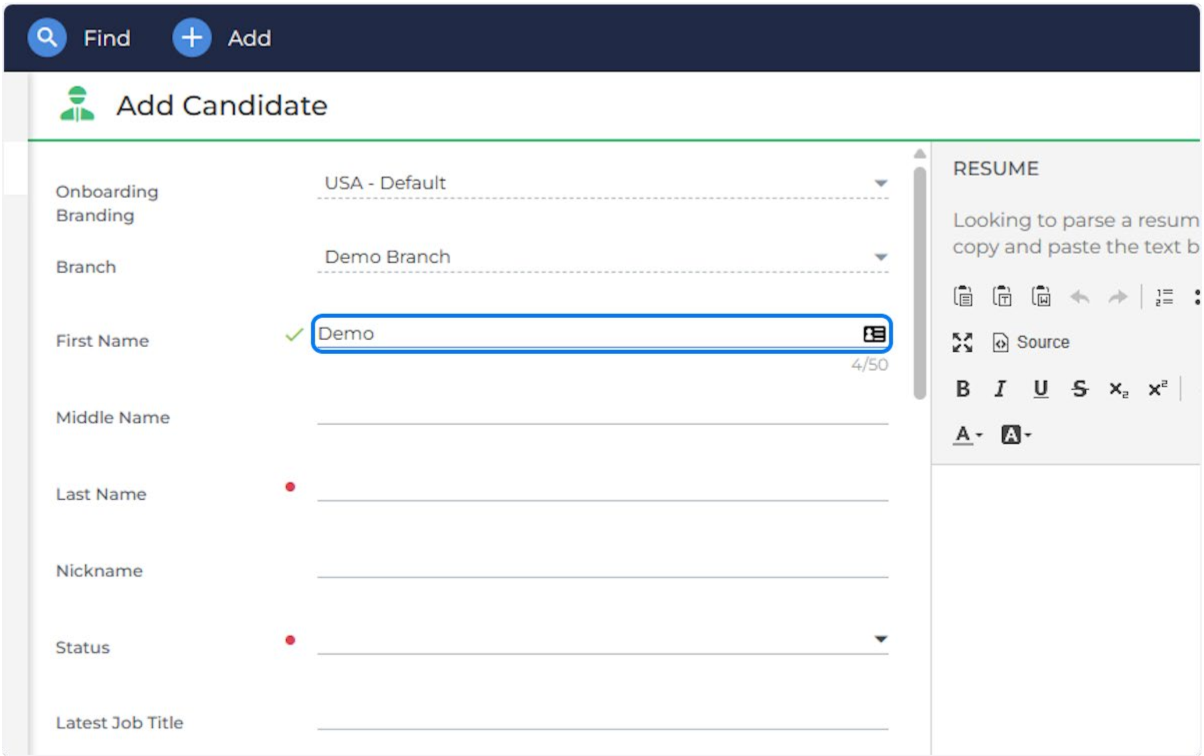
If you have a large list of candidates from another database, you can provide IT support with a CSV file to easily import those records into the system.

8. Click on + Add then Candidate.

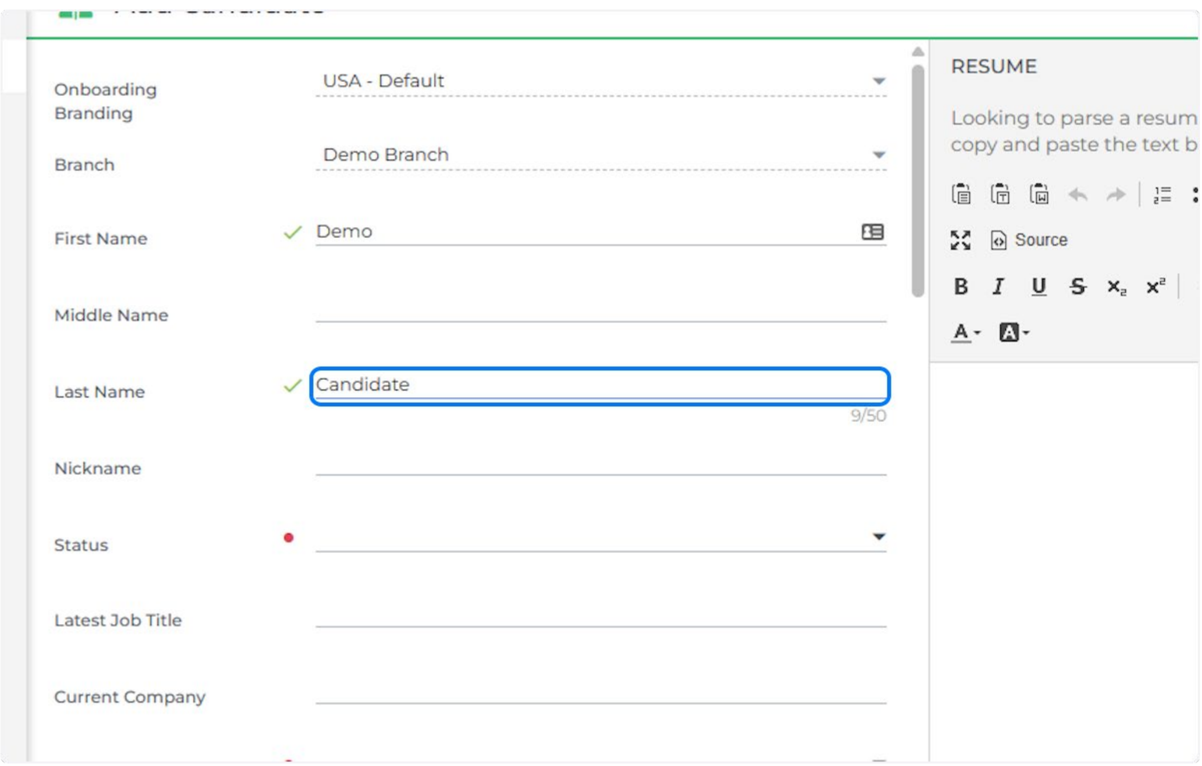


Onboarding Branding is used for branding in the onboarding portal and restricts certain documents from being viewed by internal users. Branch is used for reporting purposes to easily sort and filter which branch a record belongs to. These fields are automated by our system and can only be change by SMG team members.

9. Add a first name.

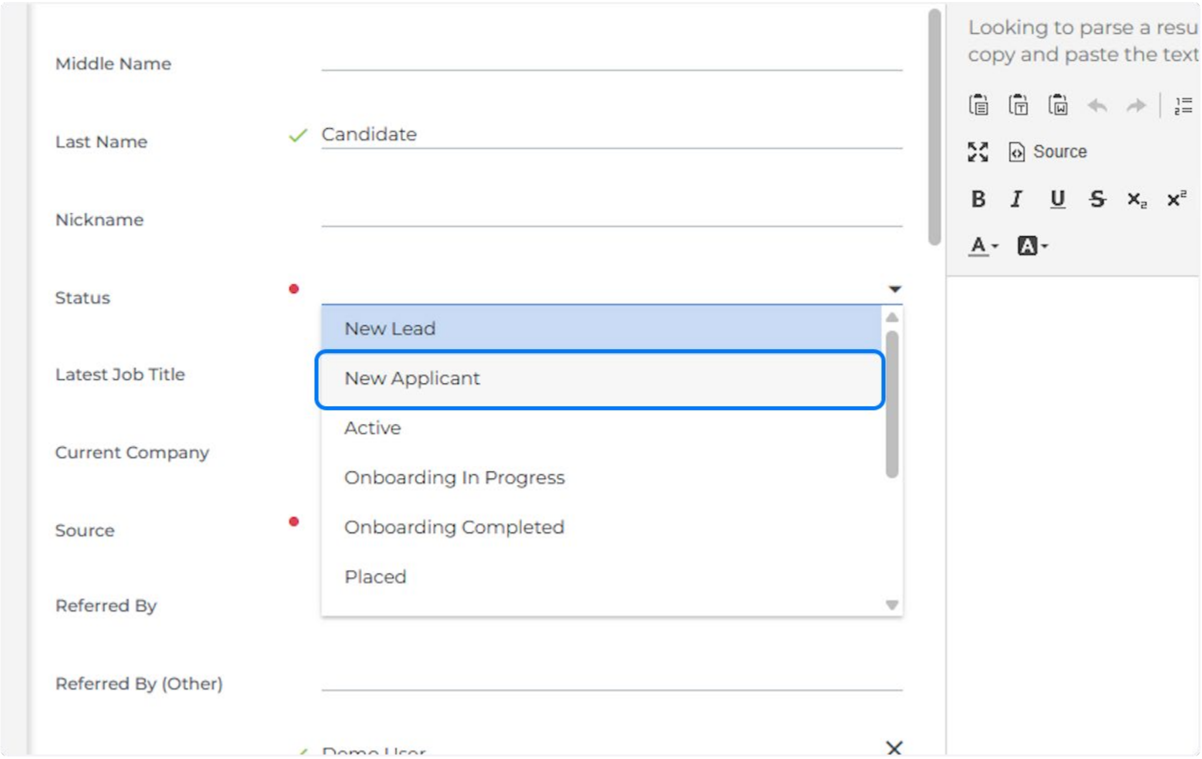


10. Add a last name.

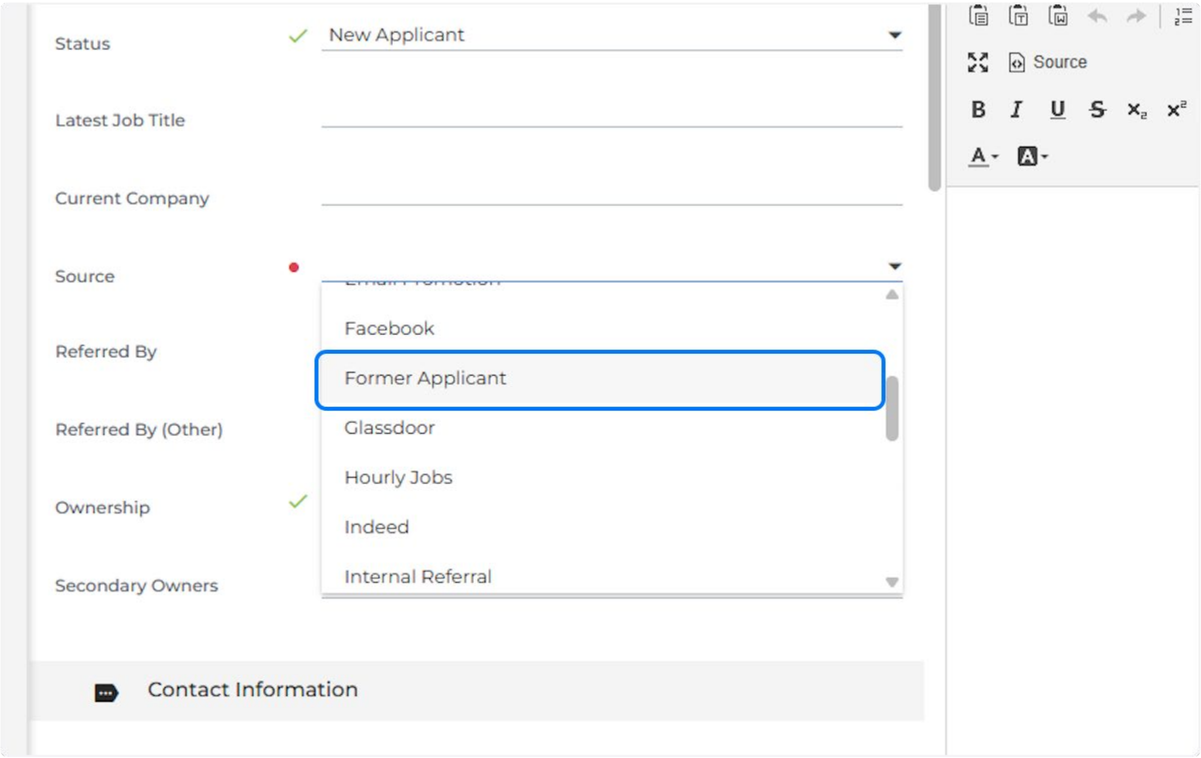


11. Set a status for the candidate.

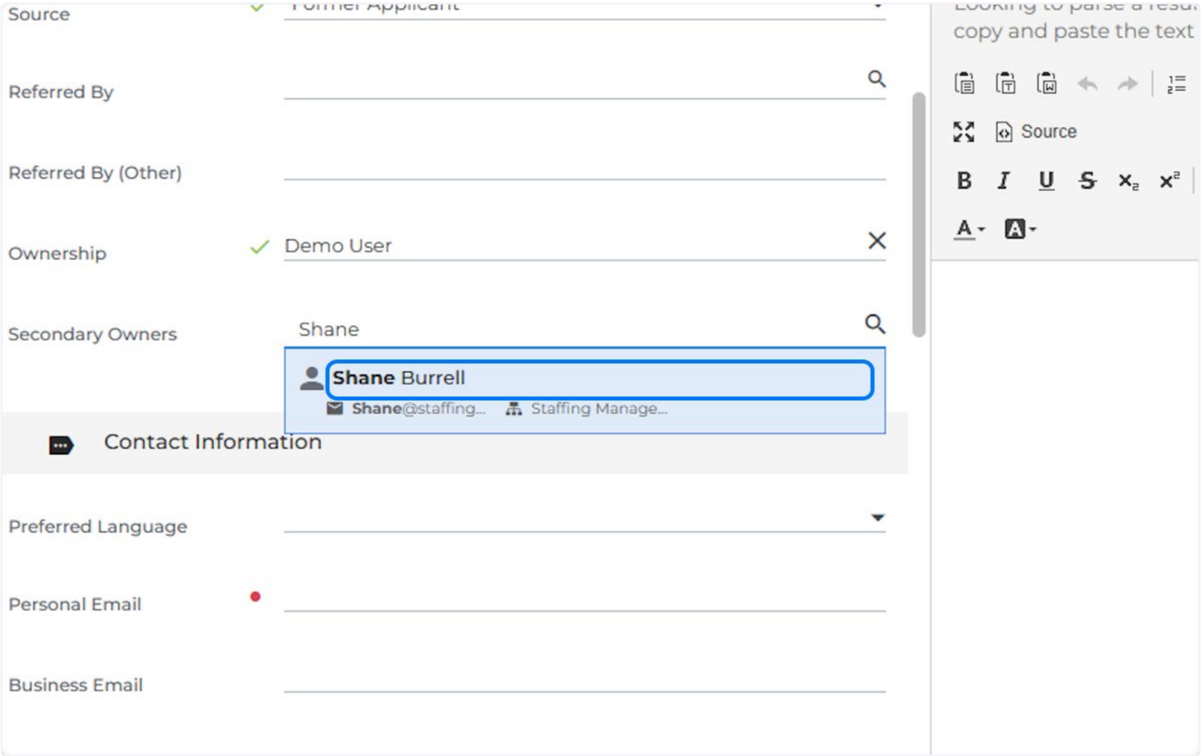
Note: New Lead will be automatically generated by web responses/job board applicants, New Applicant is the standard status for new candidates, Active means the candidate is being communicated with or actively responding to job postings, Onboarding In Progress and Onboarding Completed are automated during the Onboarding Process, Placed is automatically set when a candidate is on assignment.



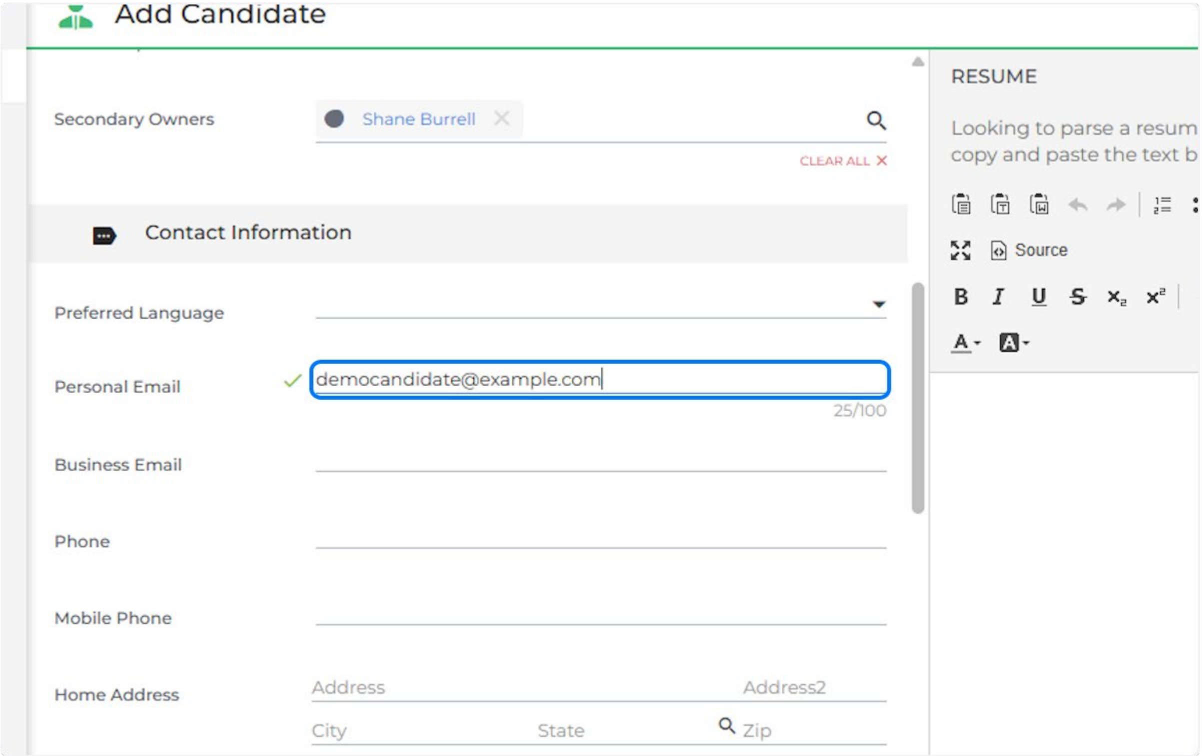
12. Select a Source.



13. All users within the same Department/Branch of your organization will have access to candidate records, however you can add additional users to ownership of the candidate by using the Secondary Owners field.

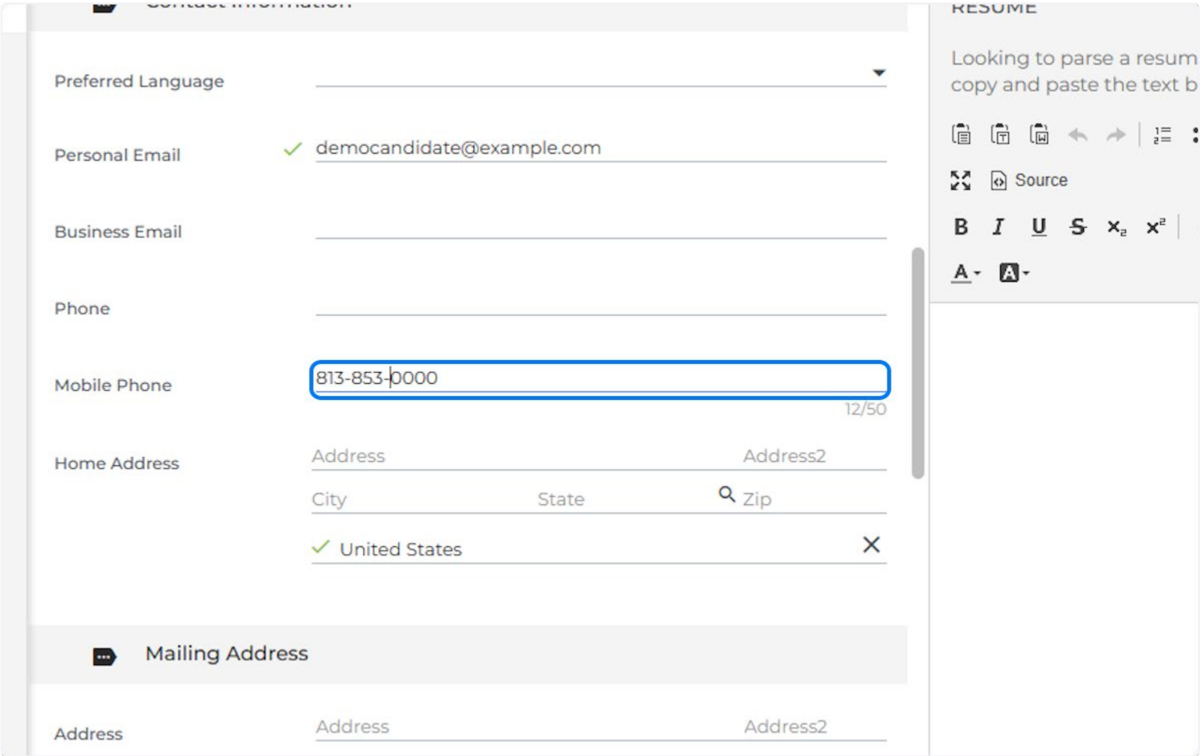


14. Enter an email address for the candidate.



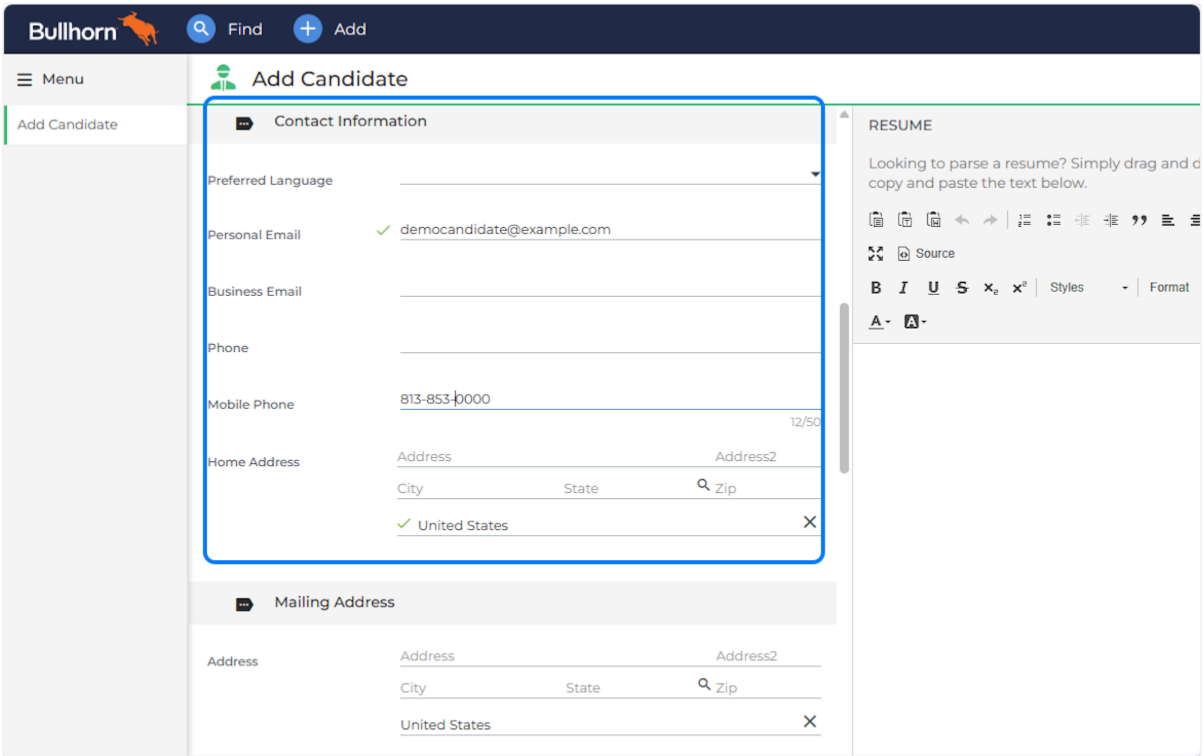
15. If available, enter a Phone Number or Mobile Number.

Note: Mobile phones can be used to communicate with via the Bullhorn Texting integration.

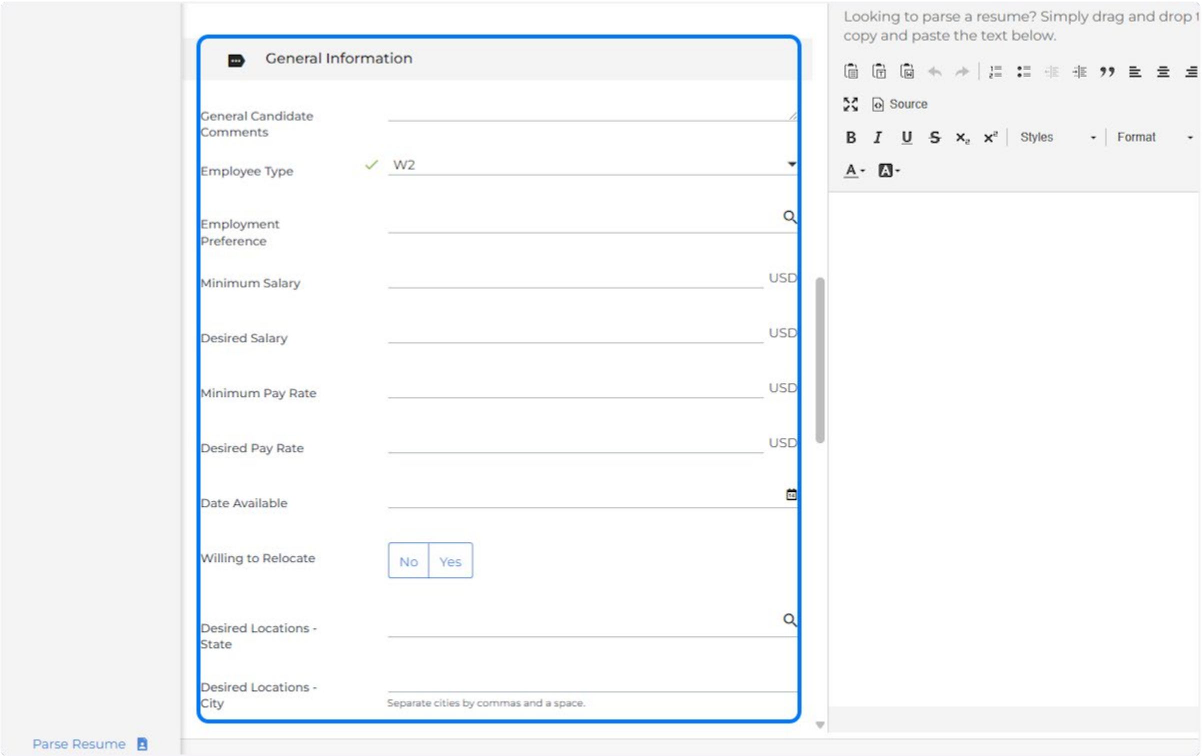


16. Complete any of the remaining information from the Contact Information section, if known.

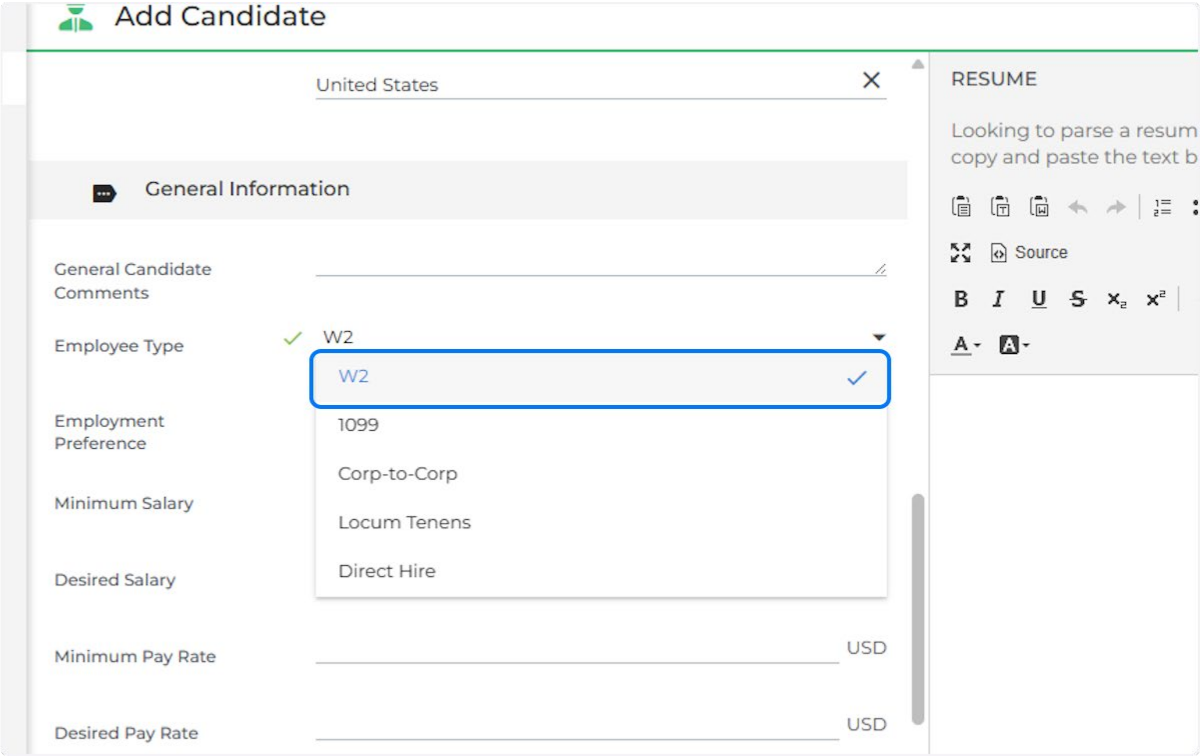
Note: If you know the State and/or city of the candidate, having this information added will be useful for searching your database. If not, the candidate can complete this during their onboarding process.



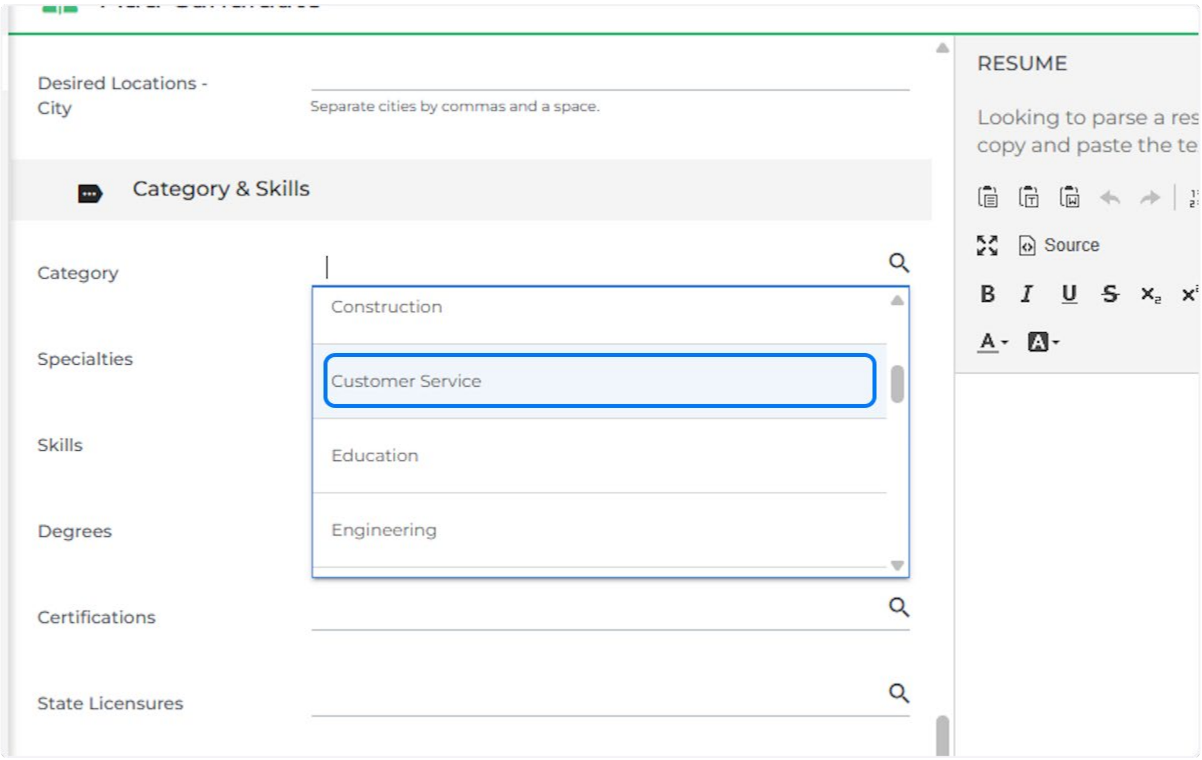
17. Fill in any of the applicable or known information in the General Information section. Otherwise, this is typically completed during the prescreening stage.



18. Selecting an Employee Type or Employment Preference can be useful for database searching to find a candidate for a specific job type.

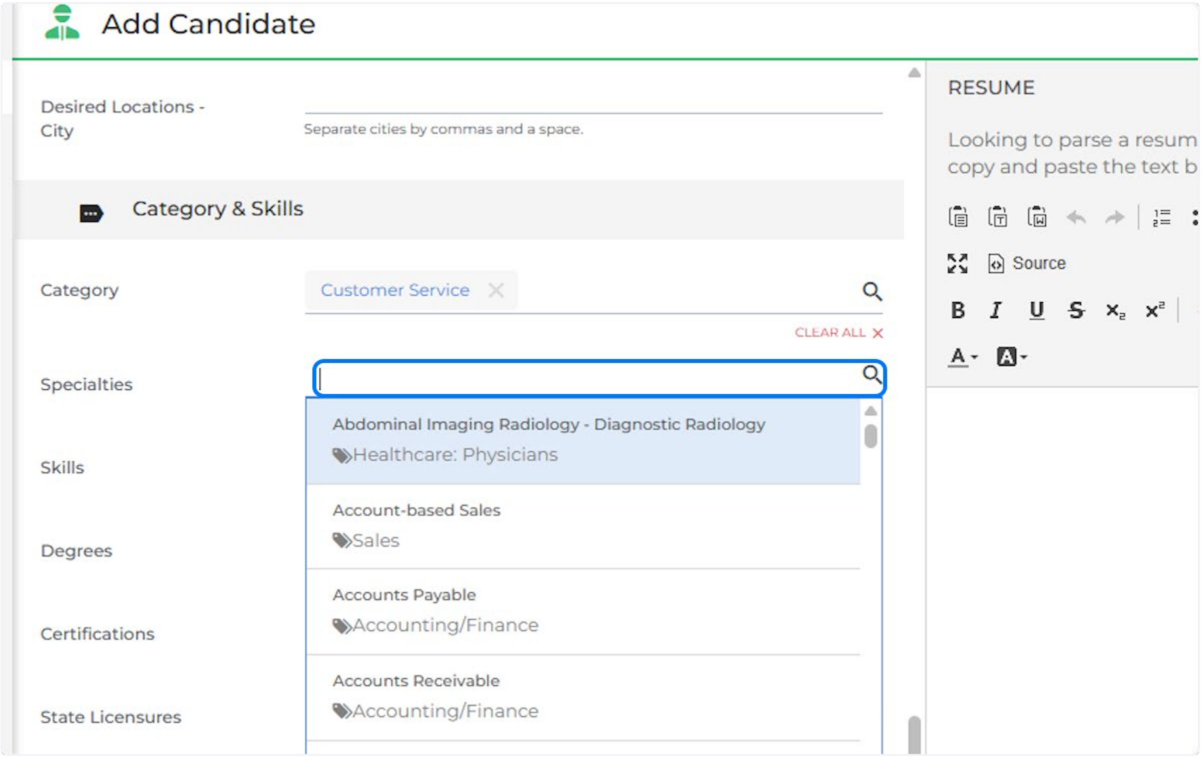


19. Select any applicable categories.



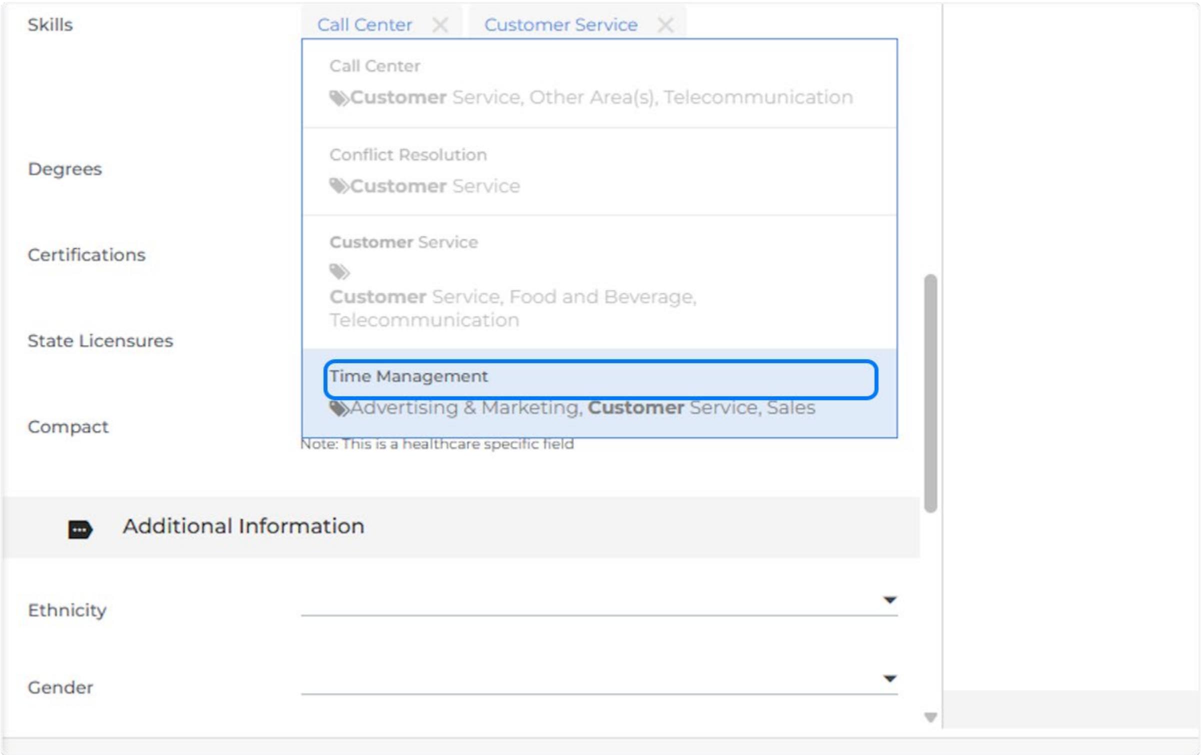
20. Select any applicable specialties.

Note: You can search a category in the Specialties field, and it will populate all specialties associated with that category. If not available, you can request to be added by contacting IT Support.



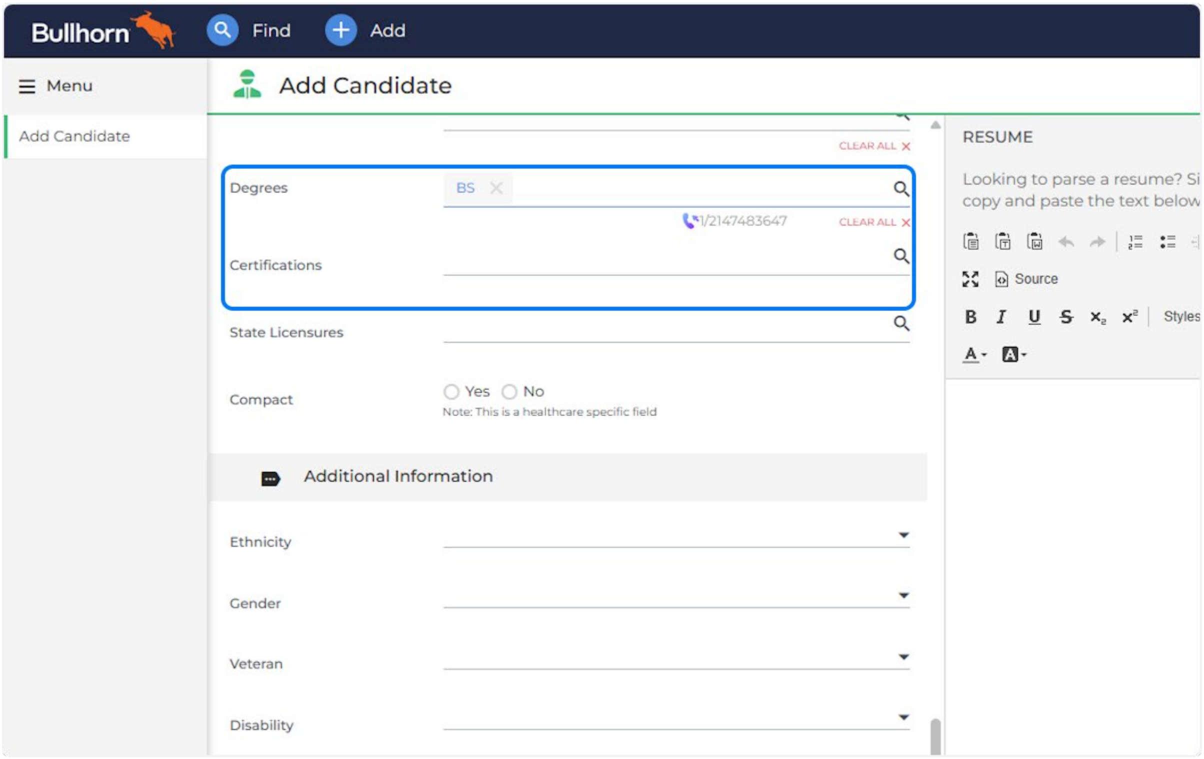
21. Select any applicable skills.

Note: You can search a category in the skills field, and it will populate all specialties associated with that category. If not available, you can request to be added by contacting IT Support.

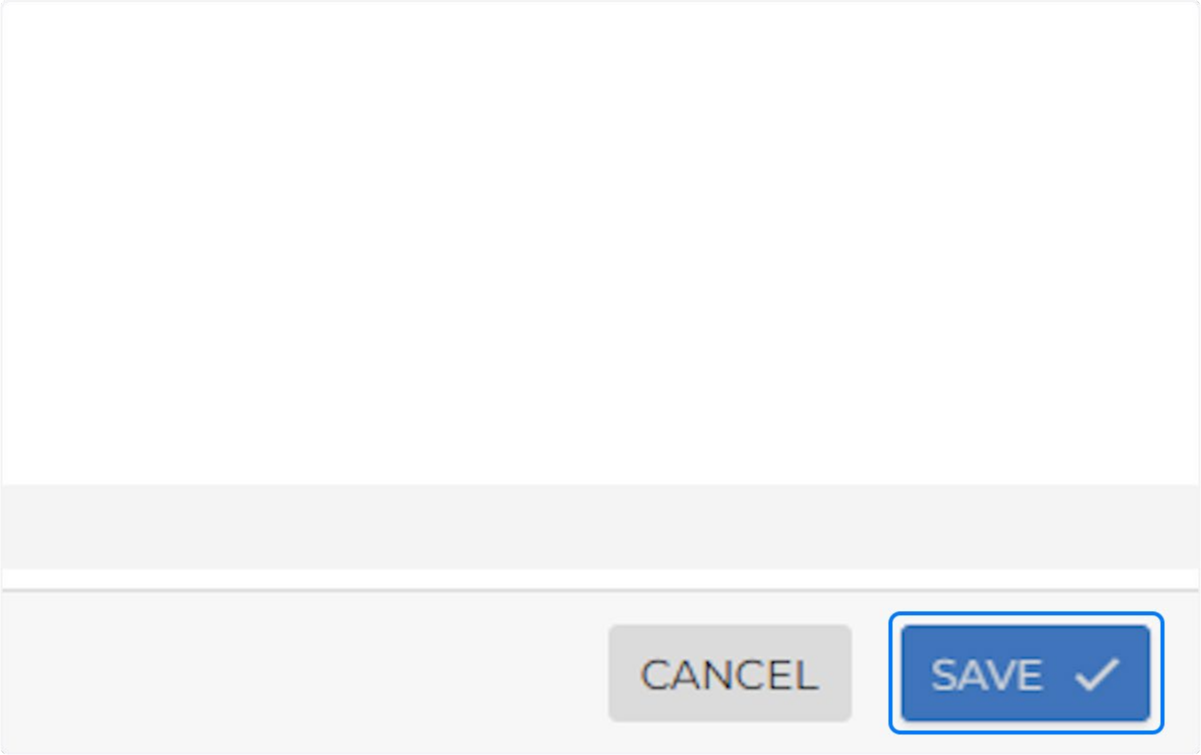


22. If you wish to track Degrees or Certifications the candidate states they have, you can add these as well.

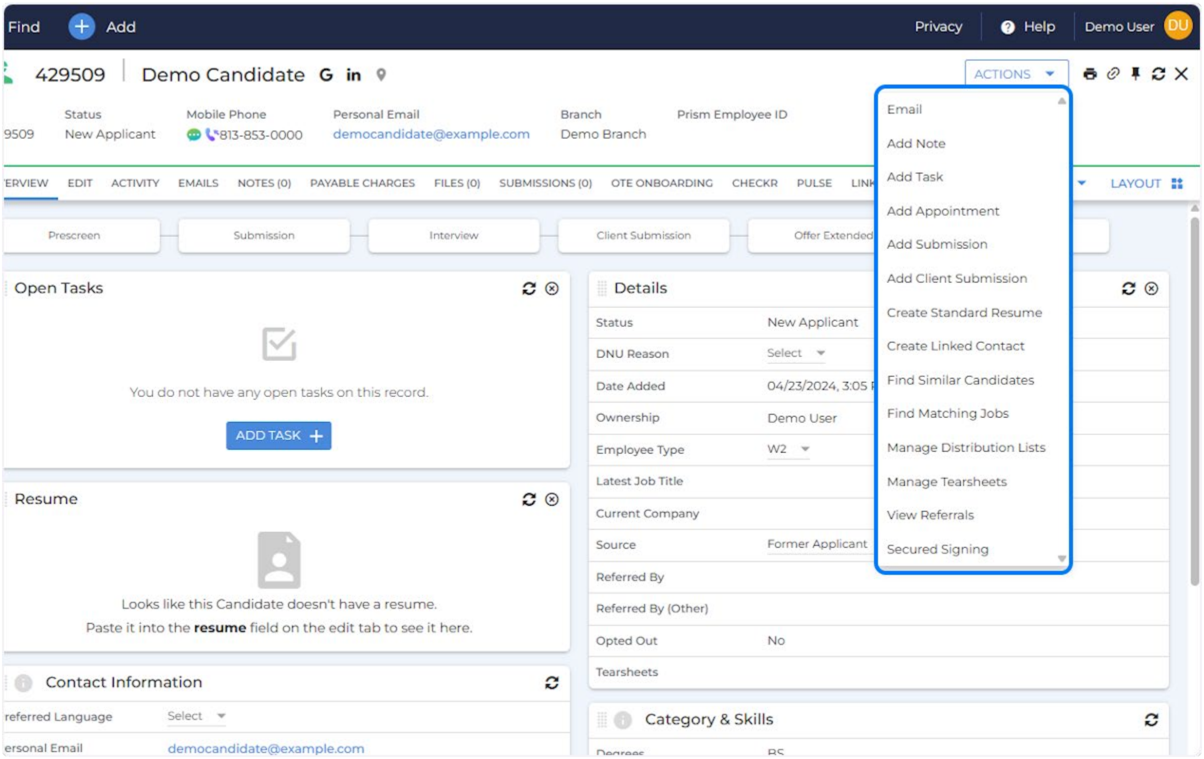
Note: There is a different Certification tab on the candidate record that will allow you to manage and track certifications for the candidate and their current statuses.



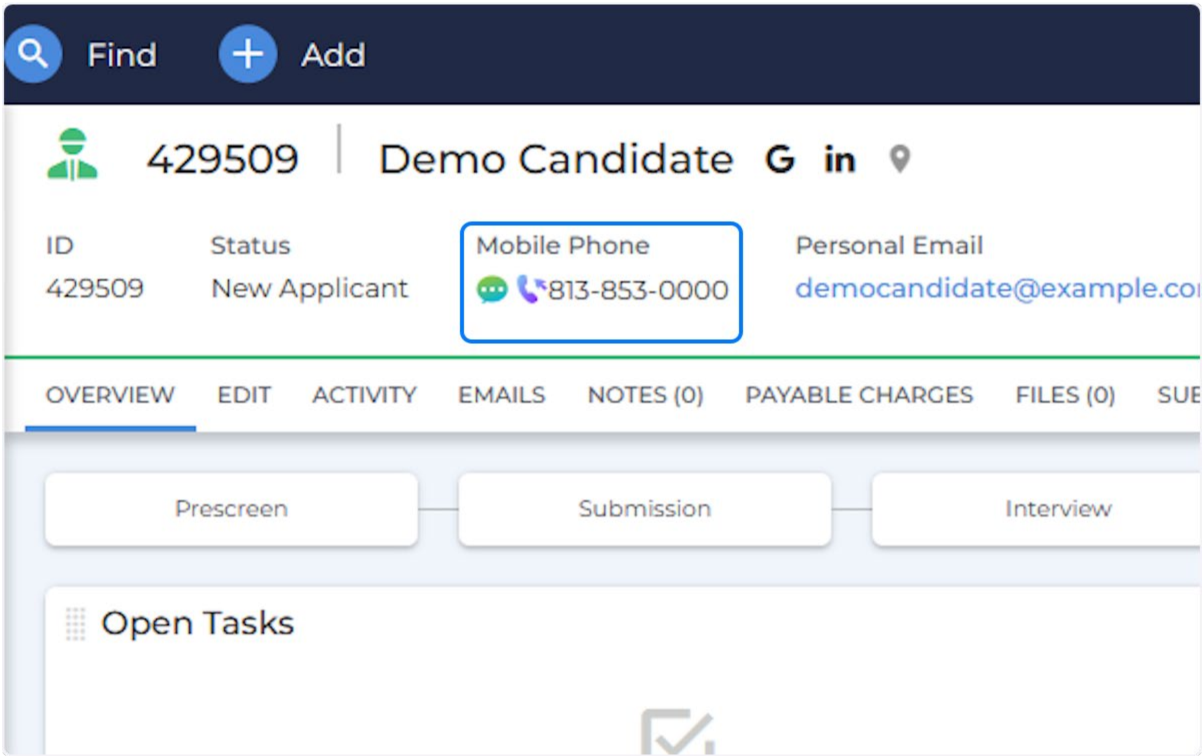
23. Click SAVE.



24. Now that the record is created, you can email the candidate, add notes, add tasks, create meetings/appointments, create submissions etc. all from the Actions dropdown.

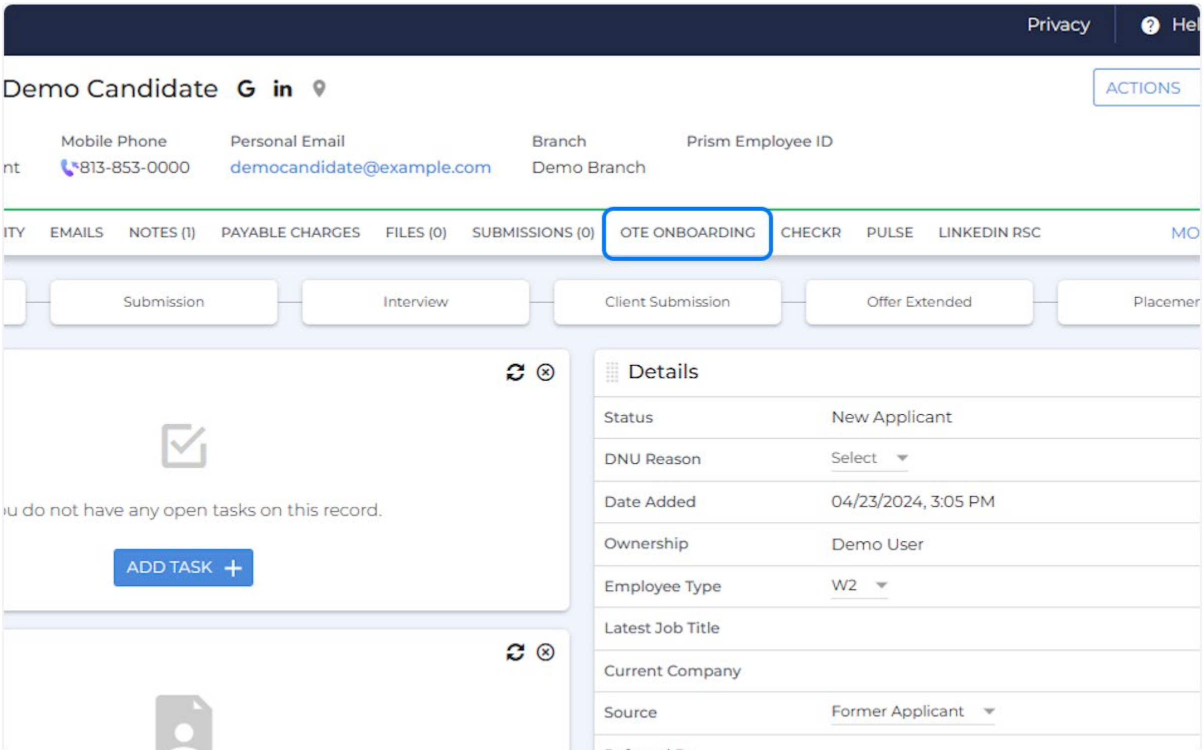


25. If you are utilizing the Bullhorn Texting integration, you will click on the texting bubble next to the Mobile Phone to open the TextUs flyout window. If you don't have the integration but wish to, contact IT Support.



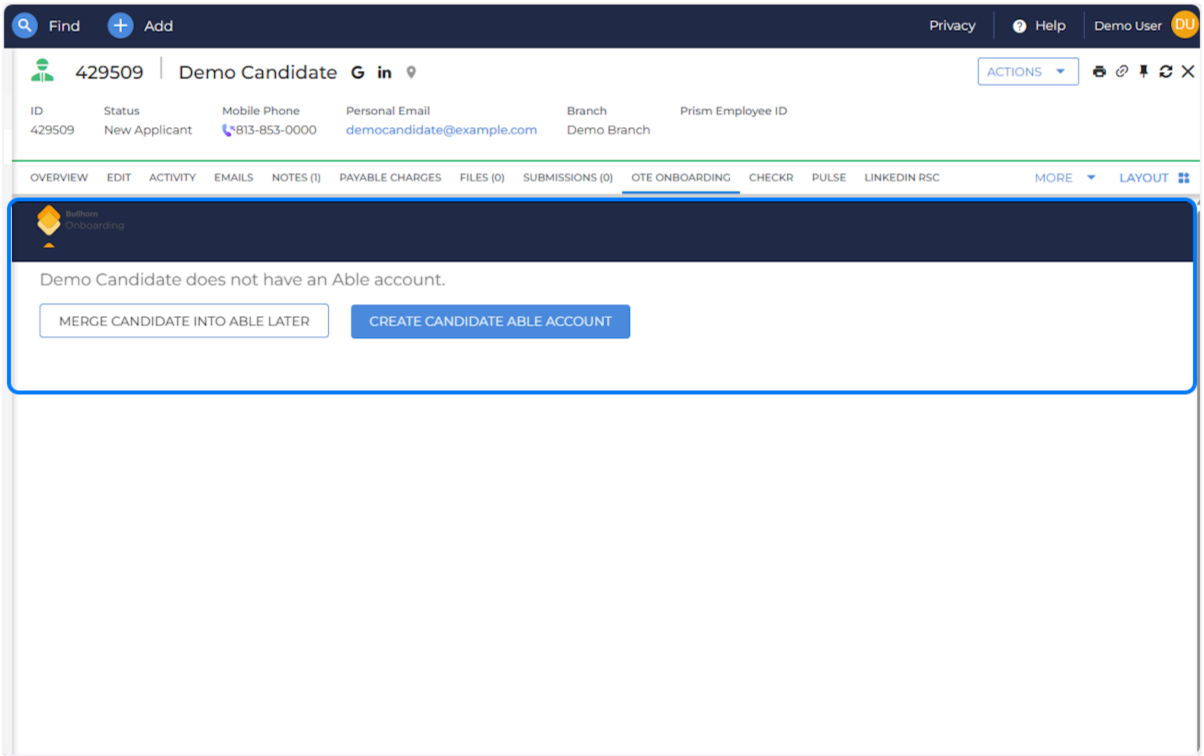
Sending & Managing Onboarding for Candidates

1. On the candidate profile, click on the OTE ONBOARDING tab.

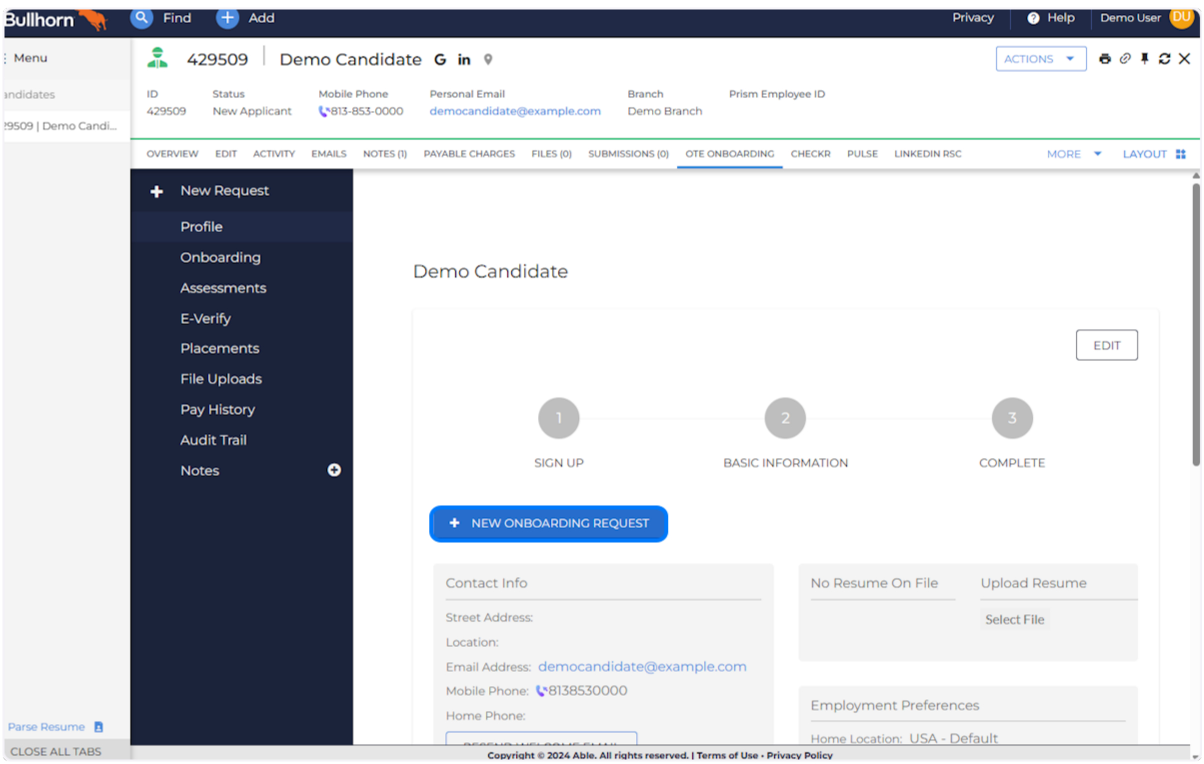


2. Click on the CREATE CANDIDATE ABLE ACCOUNT button. Allow the portal to load and you will be redirected to the Onboarding Dashboard.

Note: This will initiate a registration email to the candidate with their auto-generate username. They will need to setup their password.



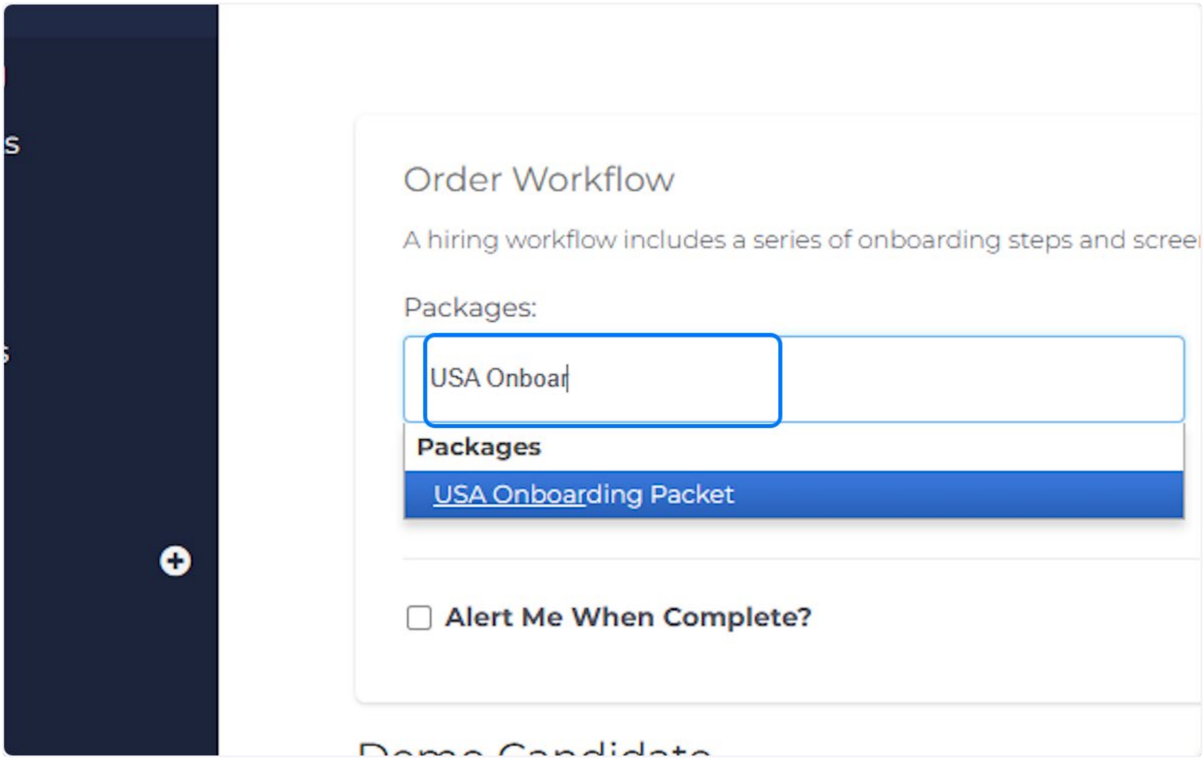
3. Click on the + NEW ONBOARDING REQUEST button.



4. If sending out initial onboarding paperwork, type either "USA Onboarding Packet" or "Everest Onboarding Packet", depending on the brand you are with and then select the packet.

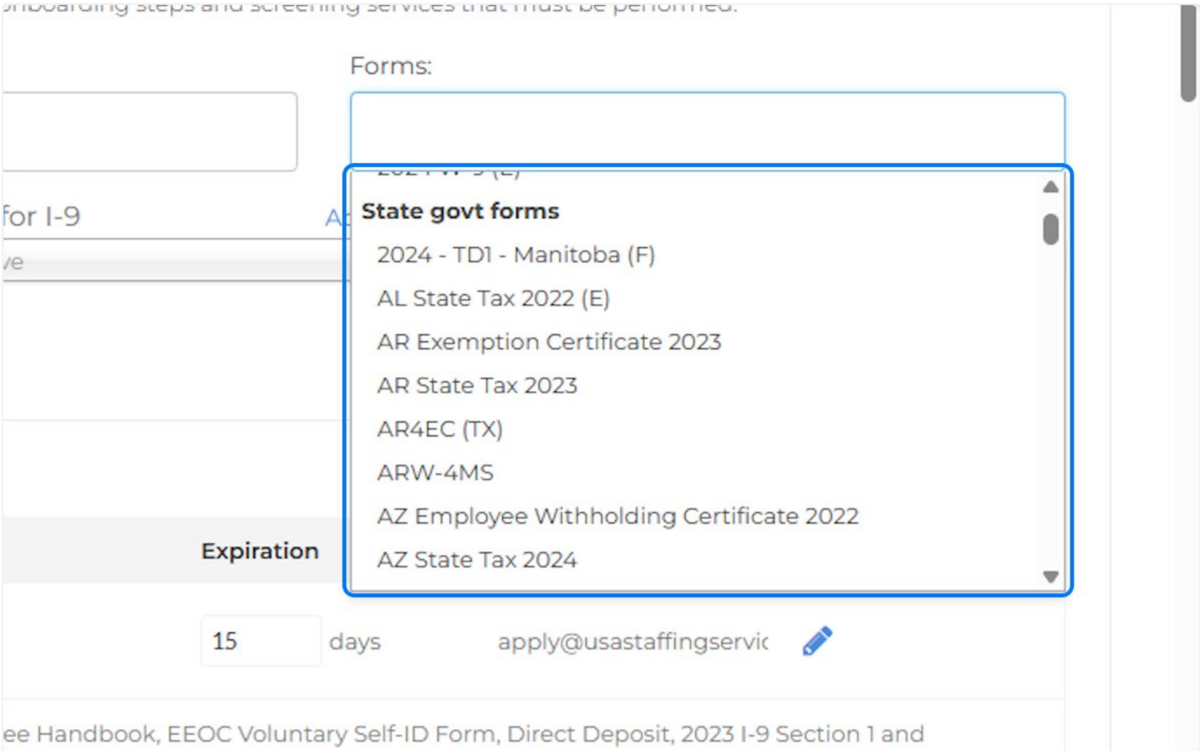
Important Note: This packet will include the following items

- Field Employee Handbook
- W4
- I9
- Employee Support Docs Upload Task
- EEOC Form
- WOTC Form
- Healthcare Benefits Enrollment Form
- Direct Deposit



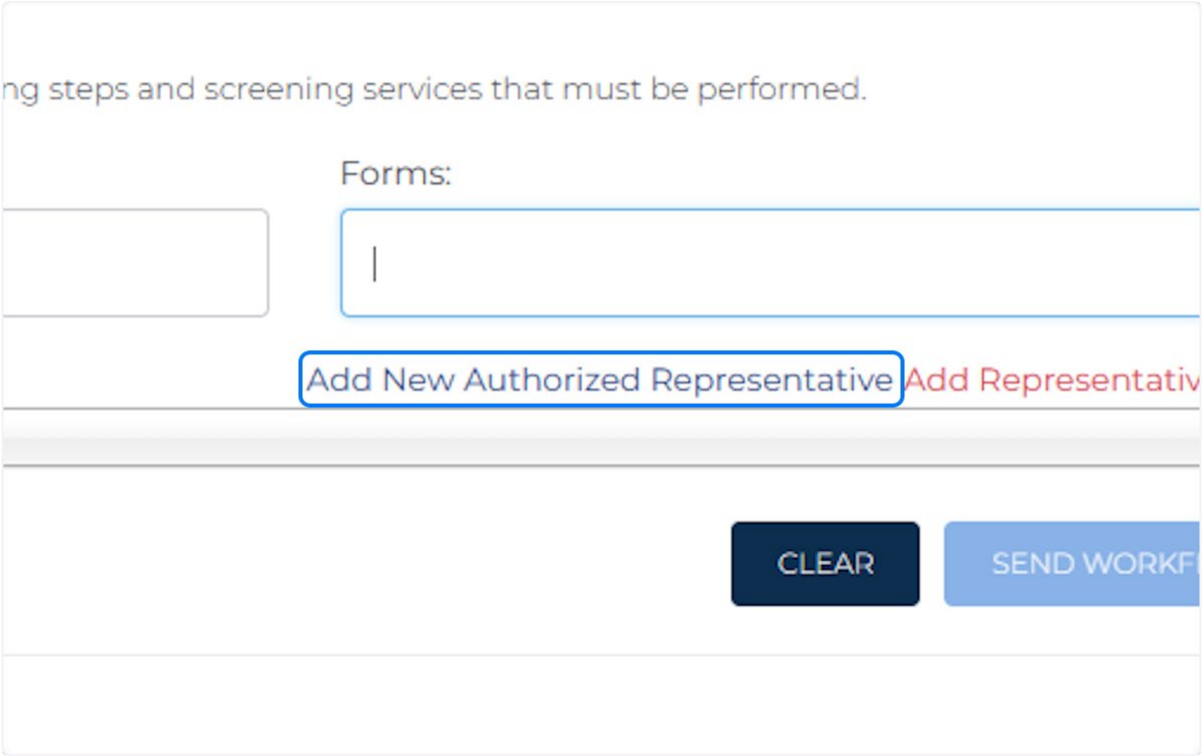
5. If you need to send a state specific document/form or an a la carte form, then select the Forms drop down and choose the appropriate document.

Important Note: You need to send out state specific tax forms in addition to the standard onboarding packet. If you have any questions, you can reach out to your Staffing Manager or the Payroll/HR Department.



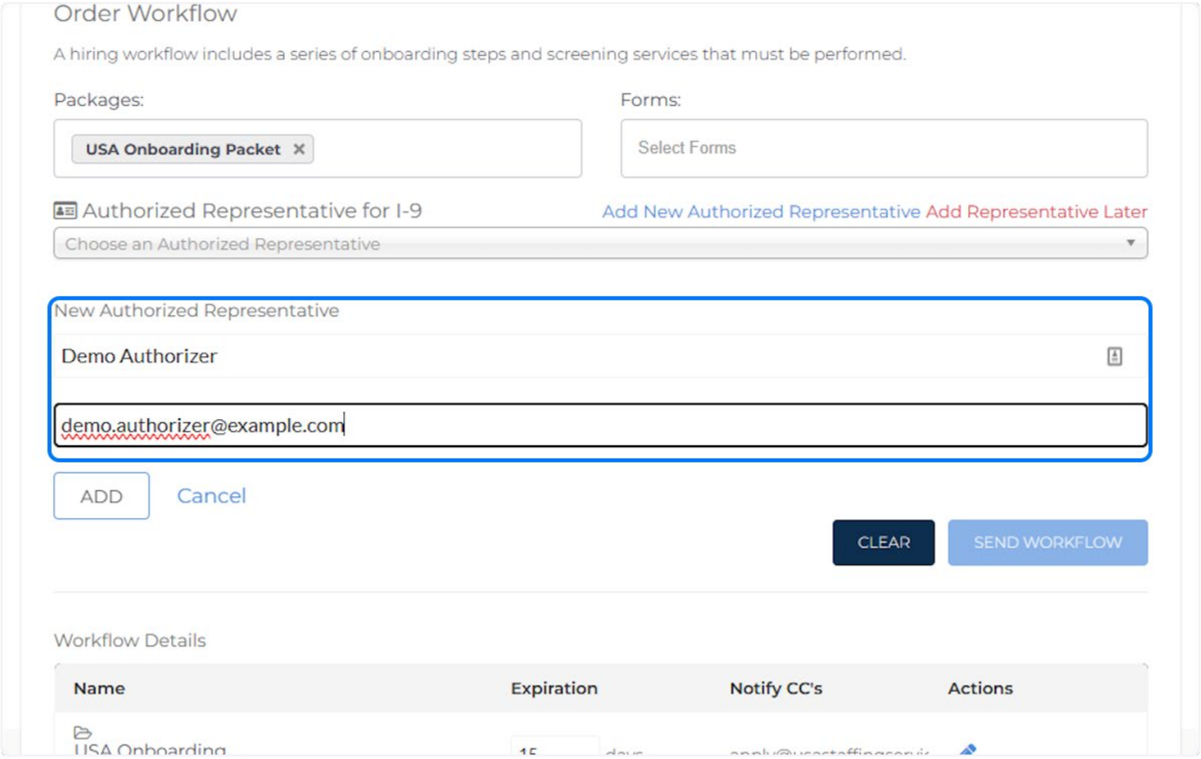
6. Click on Add New Authorized Representative to add a new representative to complete section 2 of the I9.

Note: You will only need to add the new rep once, afterwards you can select from the menu options.

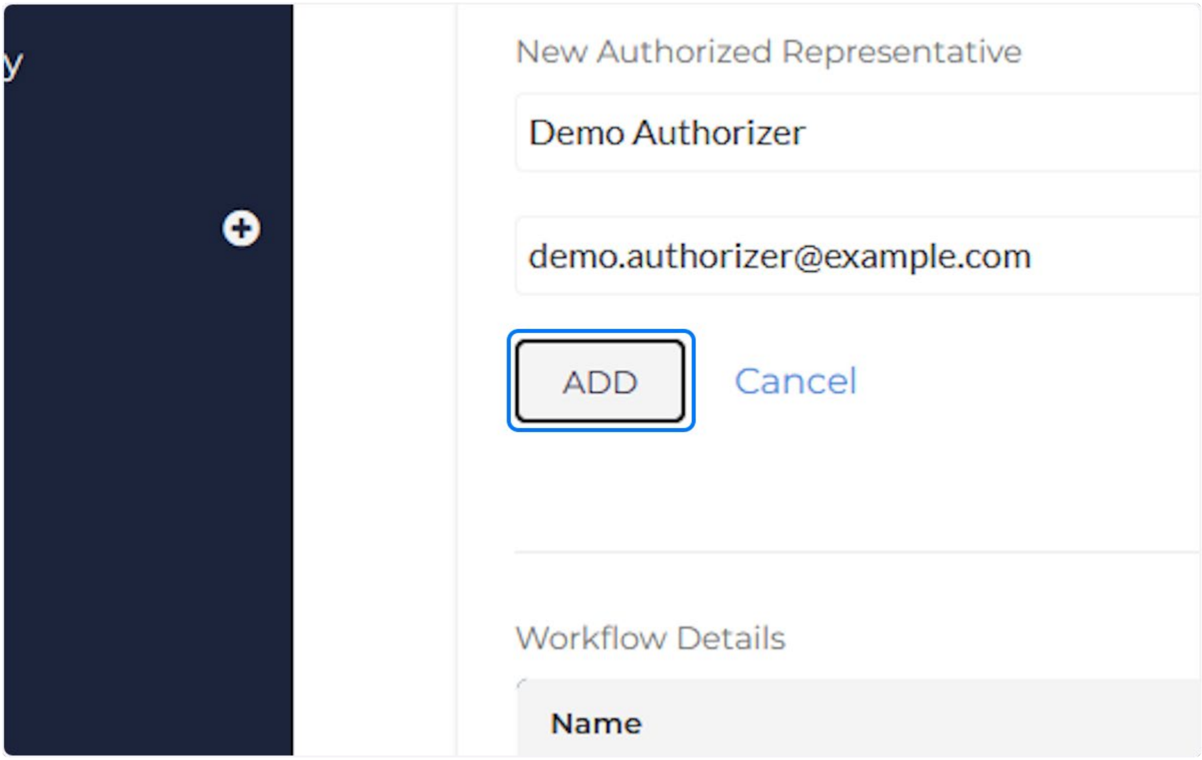


7. Enter the representatives (typically yourself) full name and email address.

Note: They will recieve an email once the section 2 is needed to be complete.

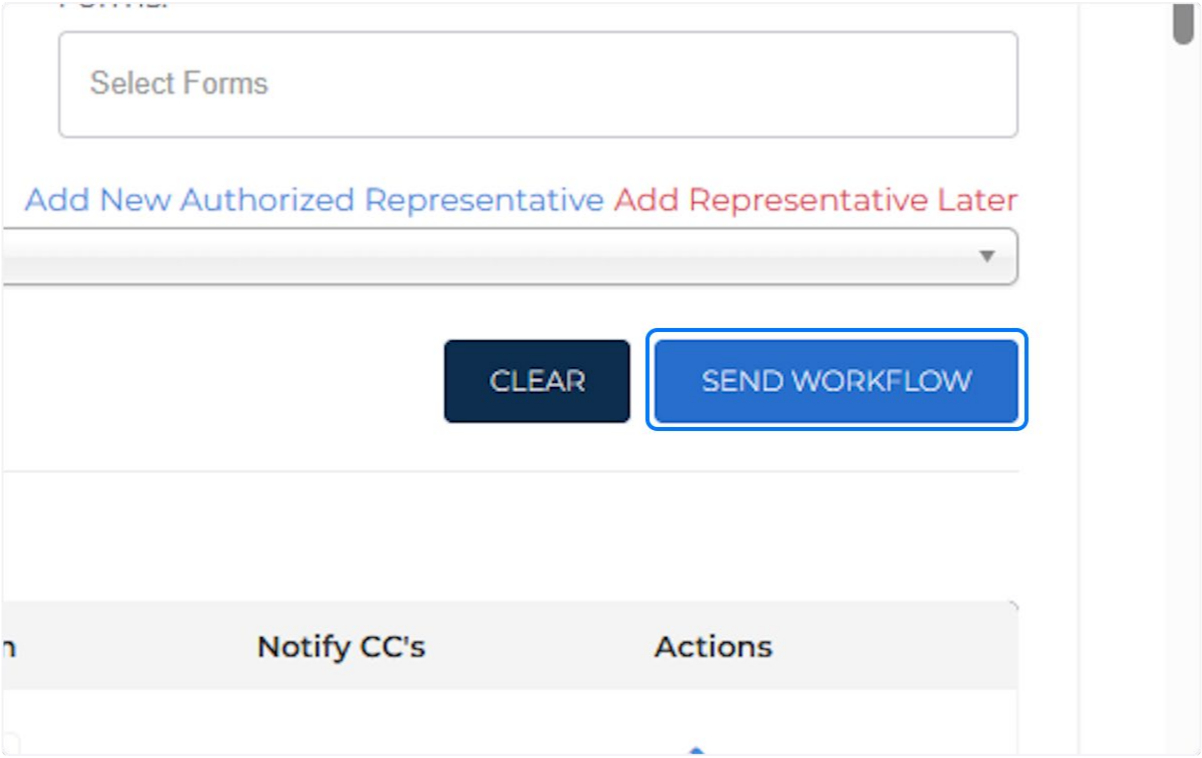


8. Click on ADD.



9. Click on SEND WORKFLOW.

Note: Once you click SEND WORKFLOW, then the employee will receive an email advising they have tasks to be completed. The email will come from **alerts@ableteams.com**. If the candidate cannot find the email, they may need to check their junk/spam folder.



Onboarding has now been sent. The next steps will cover managing the onboarding process and documents.

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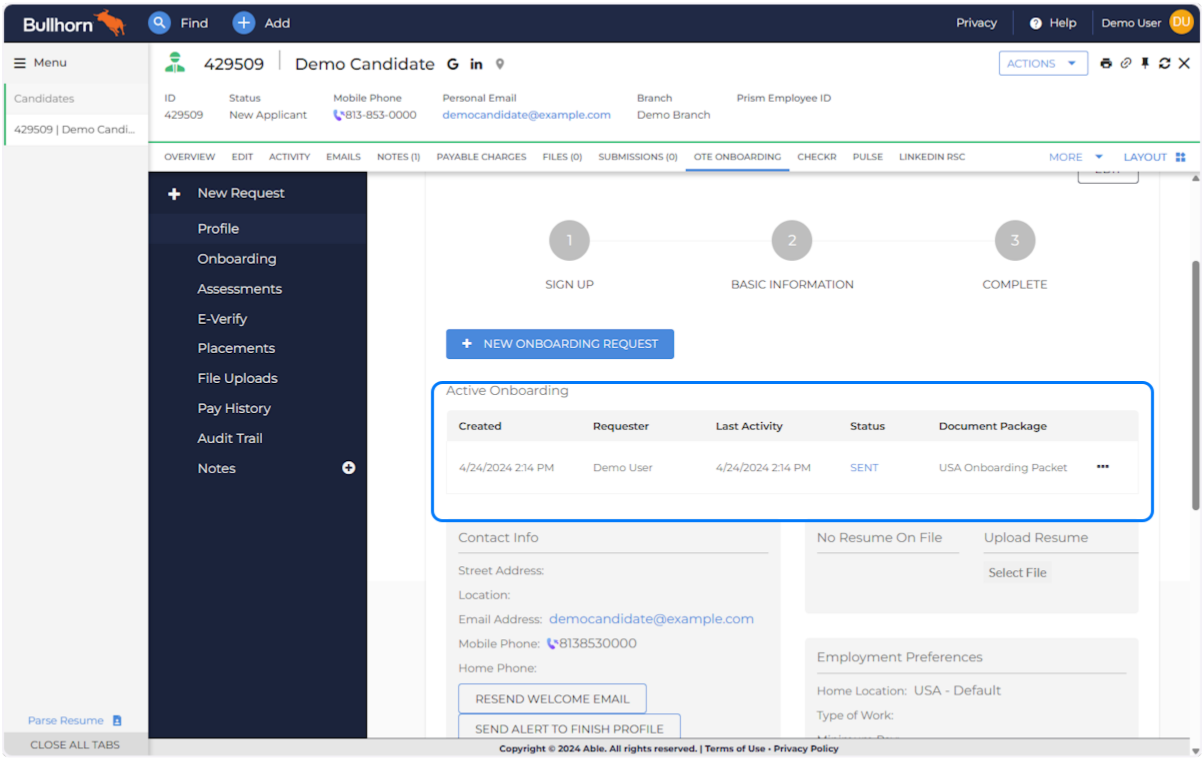
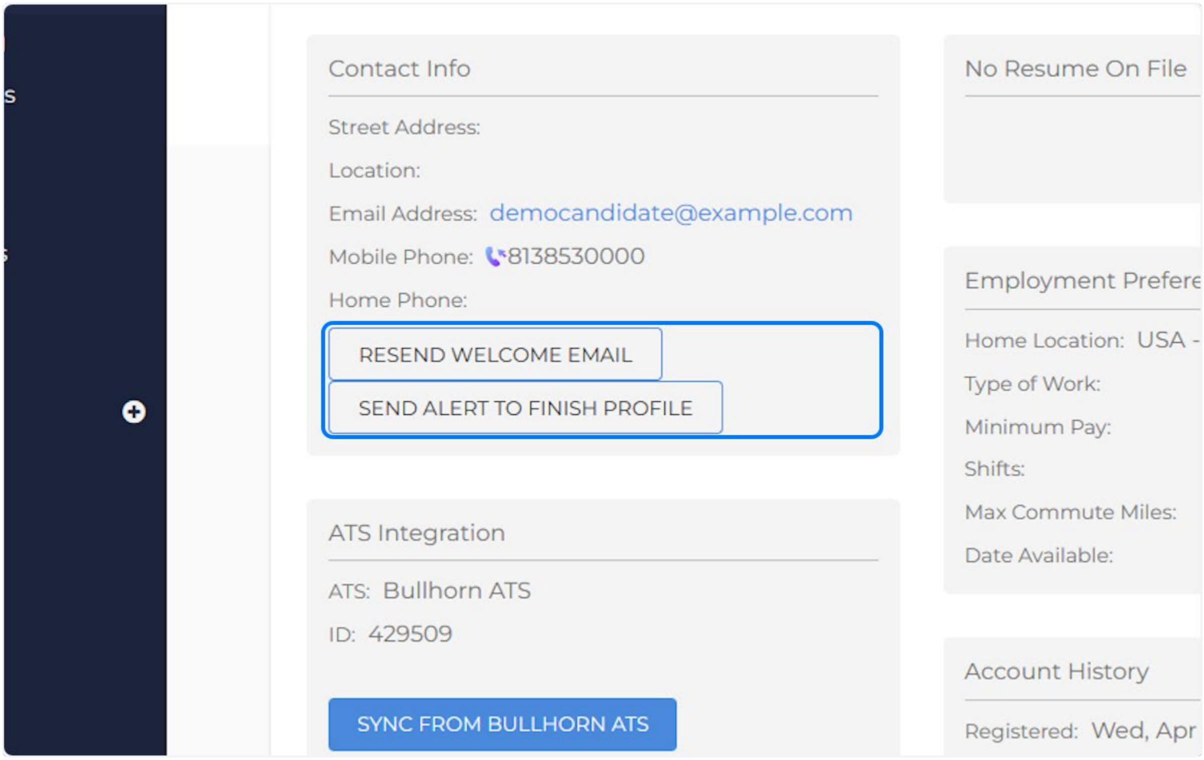
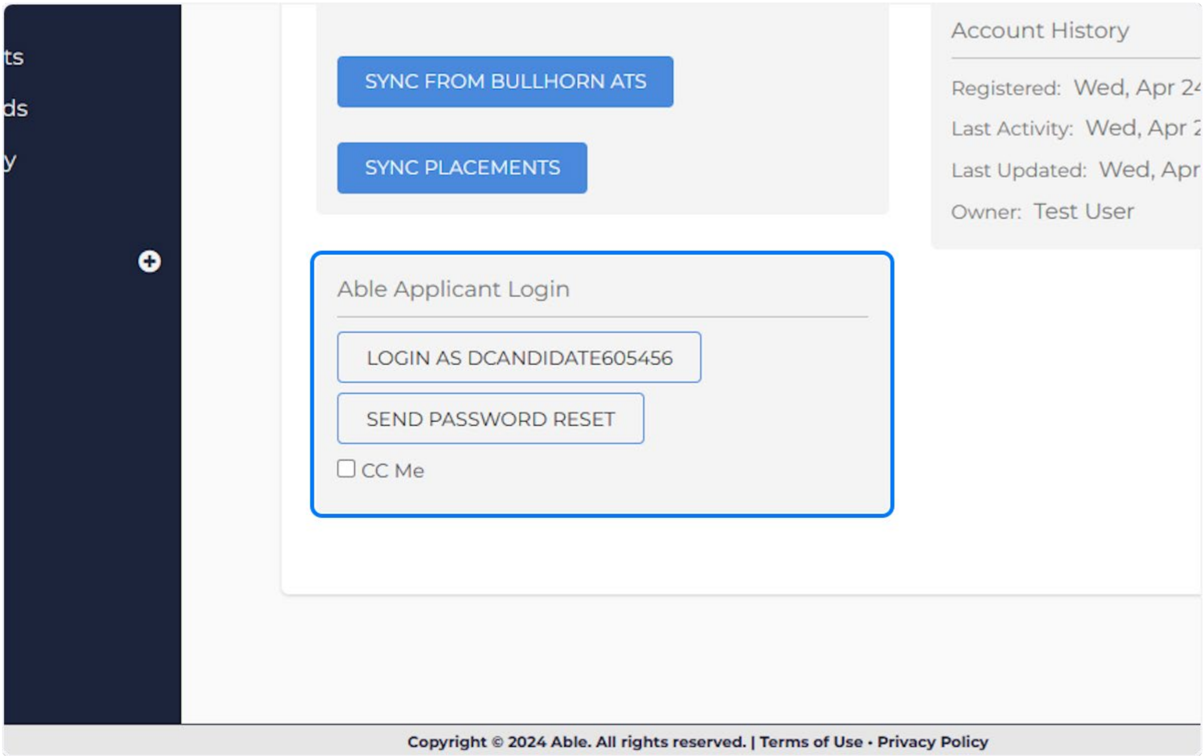
10. Once sent, a package will appear under the Active Onboarding section.



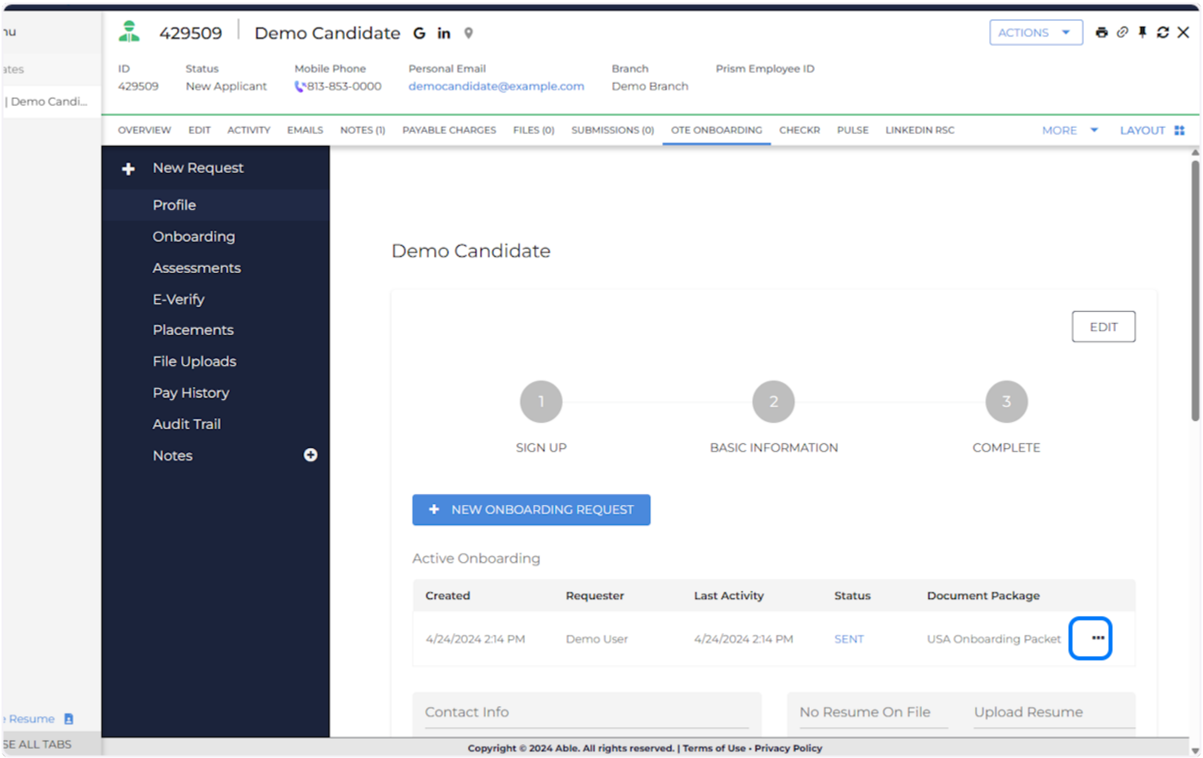
11. If you scroll down the Profile page, you can assist the candidate by resending their welcome email or sending alerts for them to finish setting up their initial profile registration.



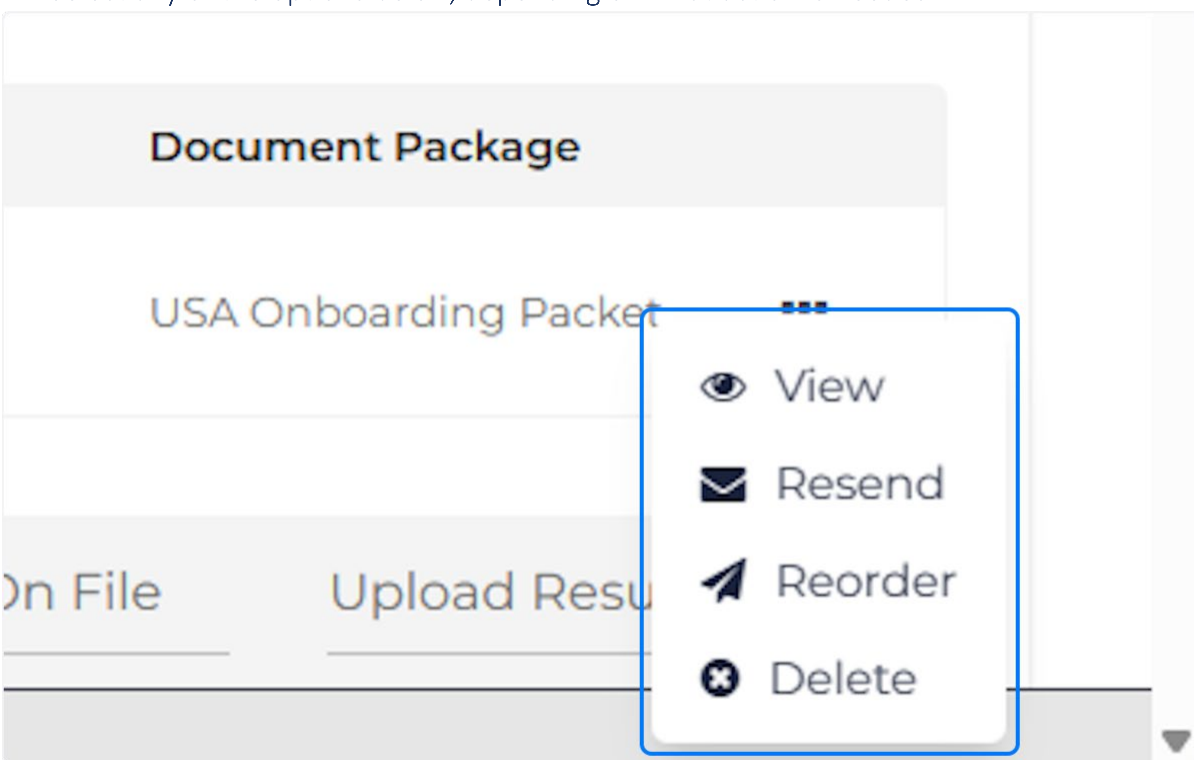
12. Scroll further to assist with resetting their password, or even Login as the candidate to assist with onboarding documents or troubleshooting issues they are running into.



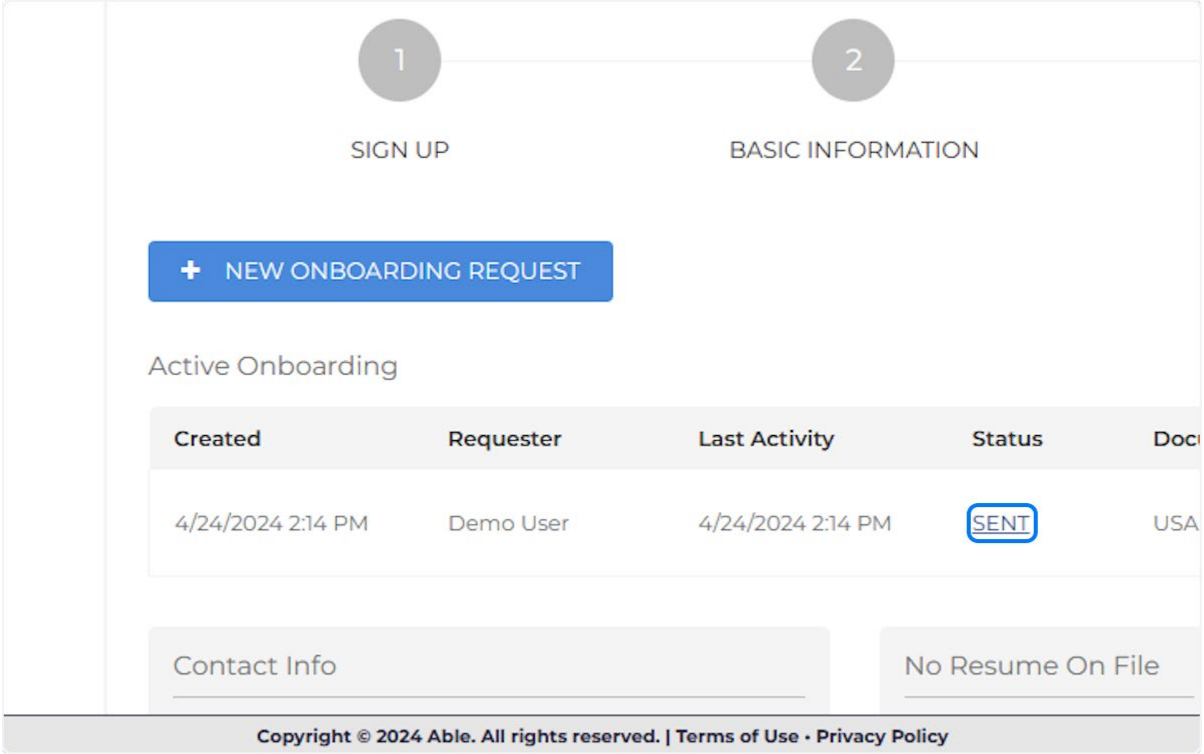
13. To edit an onboarding packet, click the "...".



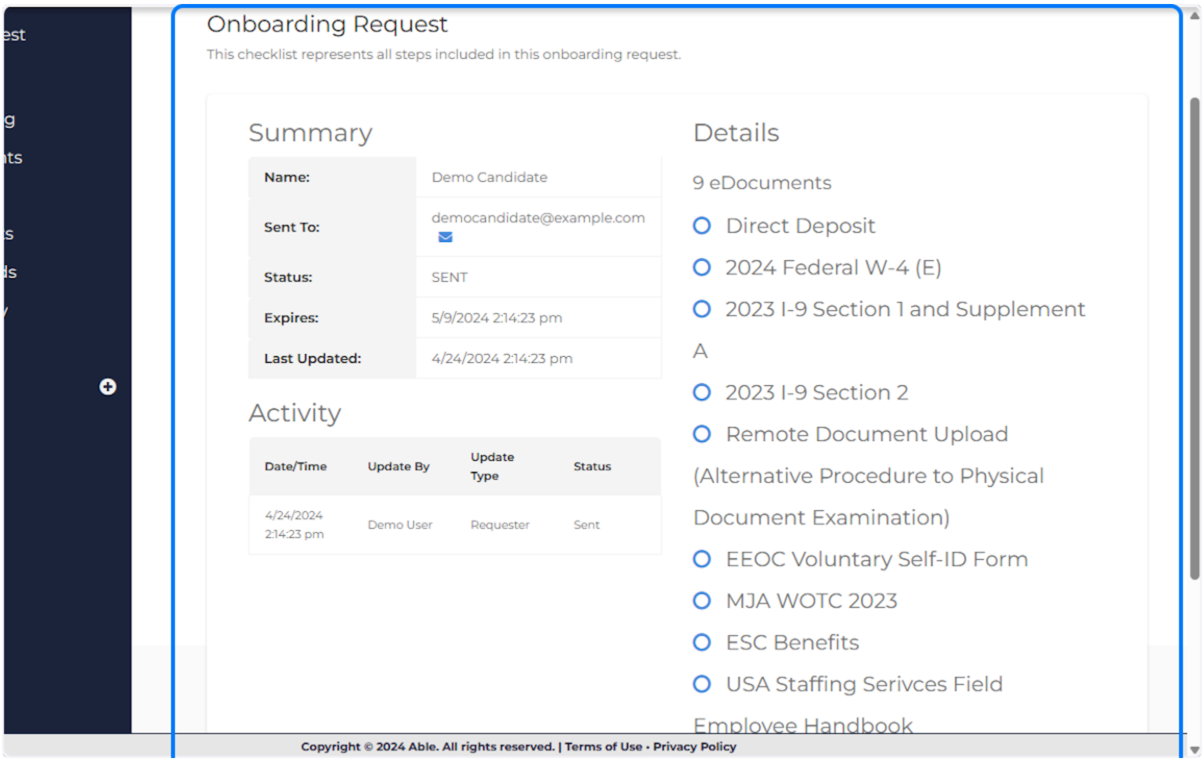
14. Select any of the options below, depending on what action is needed.



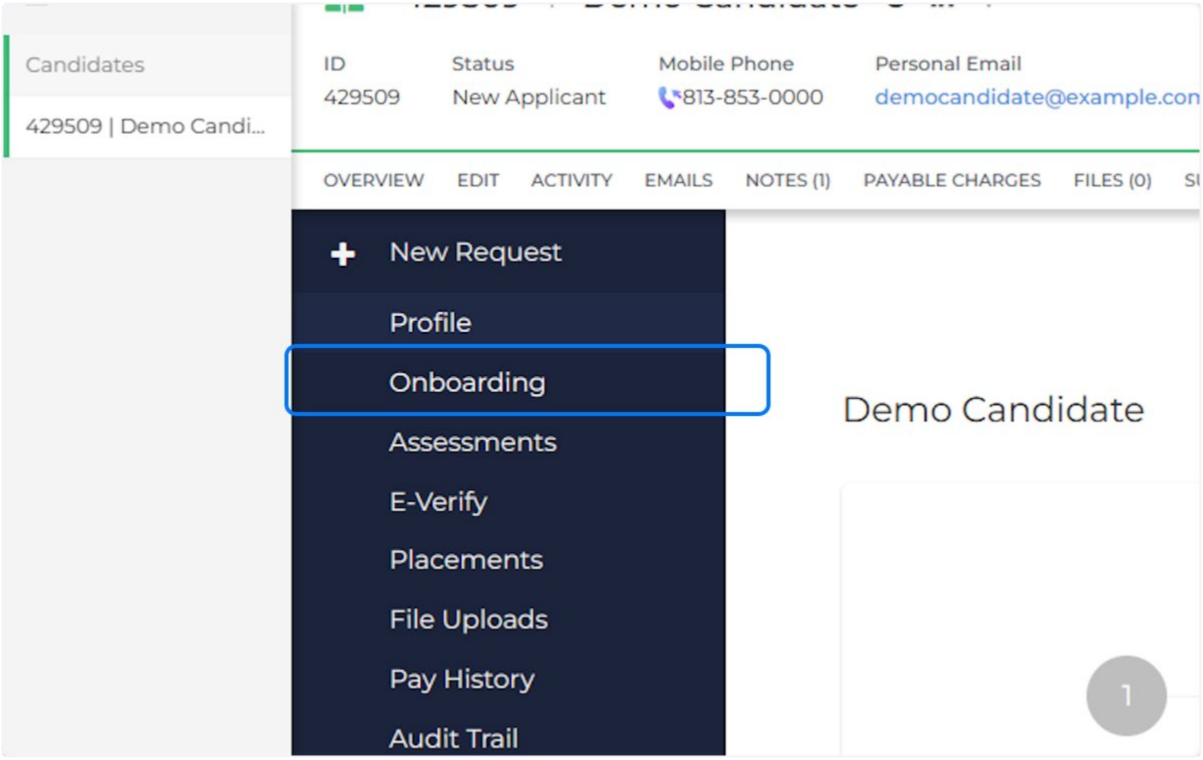
15. To view what documents are included in a packet, click on the SENT link in the Status column of Active Onboardings.



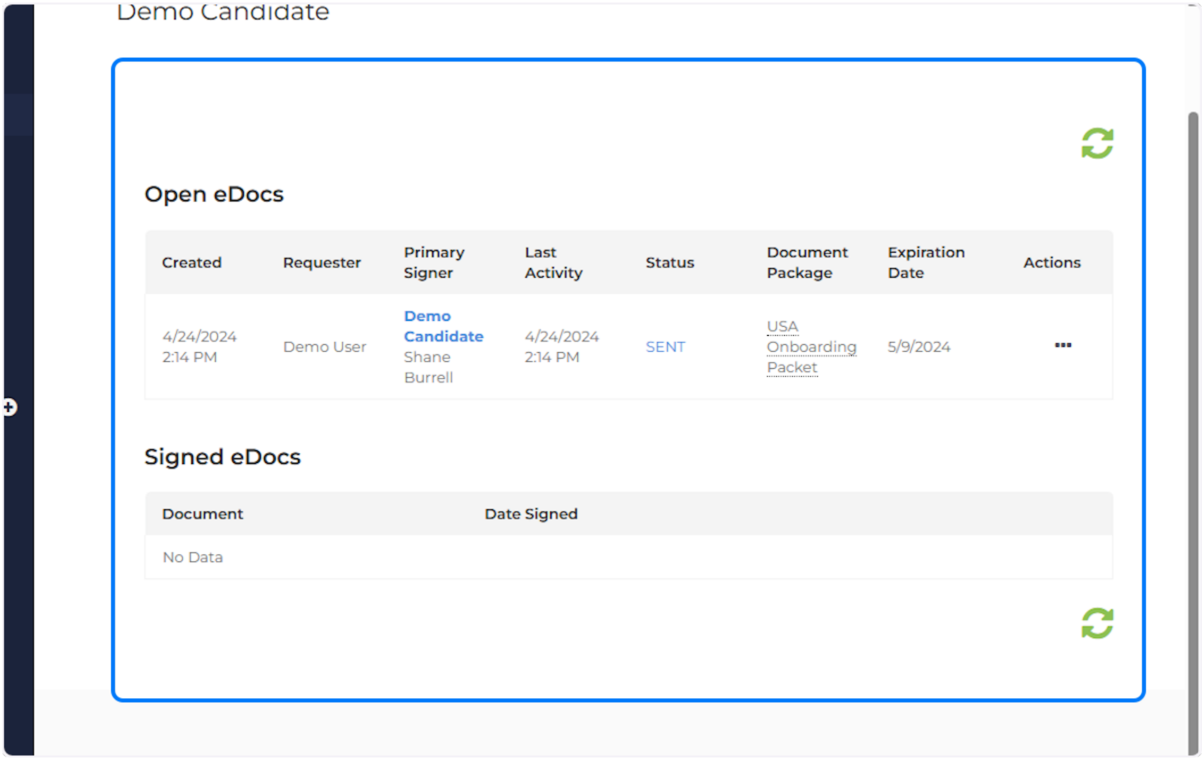
16. Here you can view the active onboardings and see which items have been completed or not.



17. To see further details for onboarding docs/packets, select the Onboarding tab in the dark blue menu.



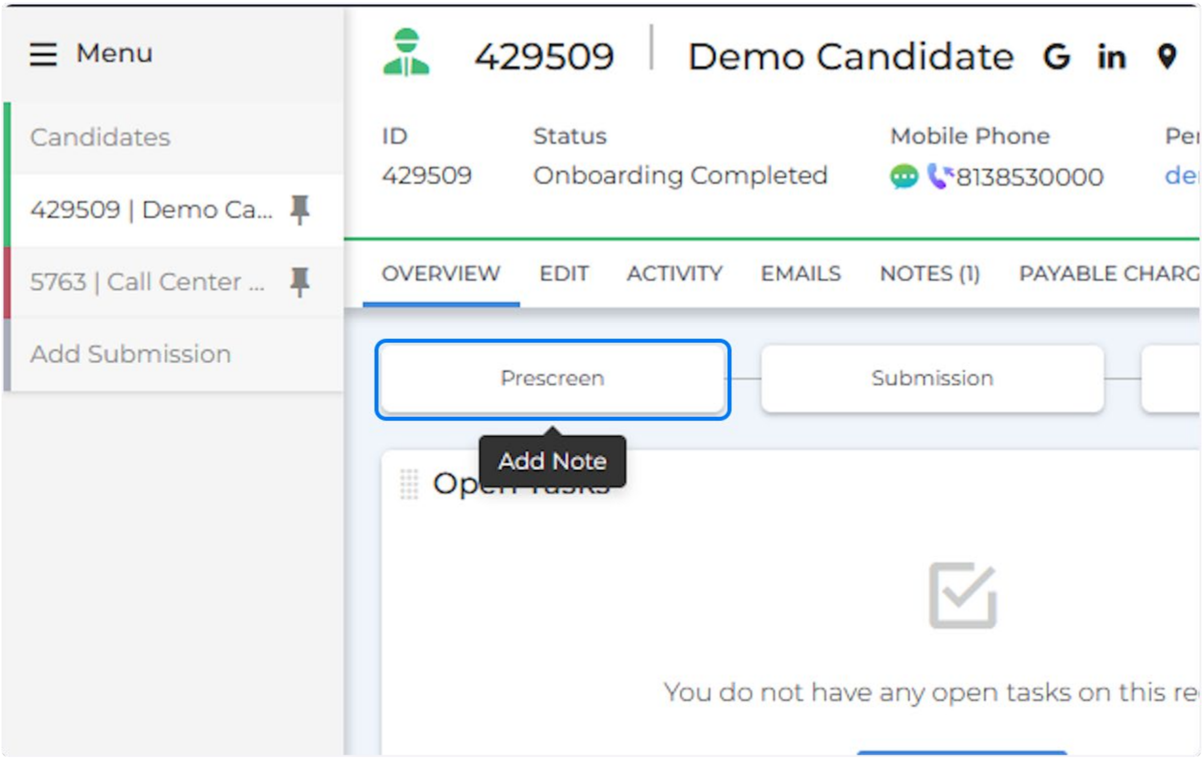
18. You will have a view like below to see statuses of documents and which are open still or have been completed.



Candidate Submission Process

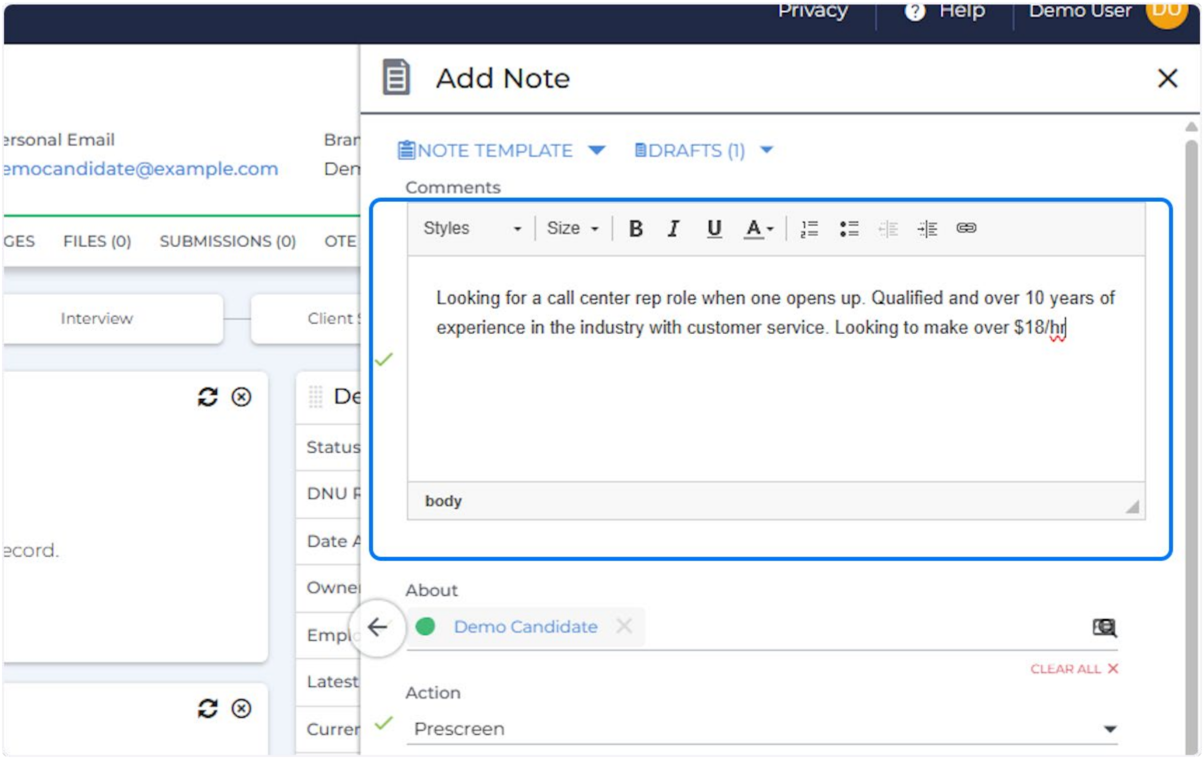
On the candidate record, you can use the Prescreen action stage to create a note type called "Presceen". This is used if you are not submitting the candidate to a job order yet and are just doing a general prescreen to take notes.

1. On the candidate record, click on the Prescreen stage of the pipeline.

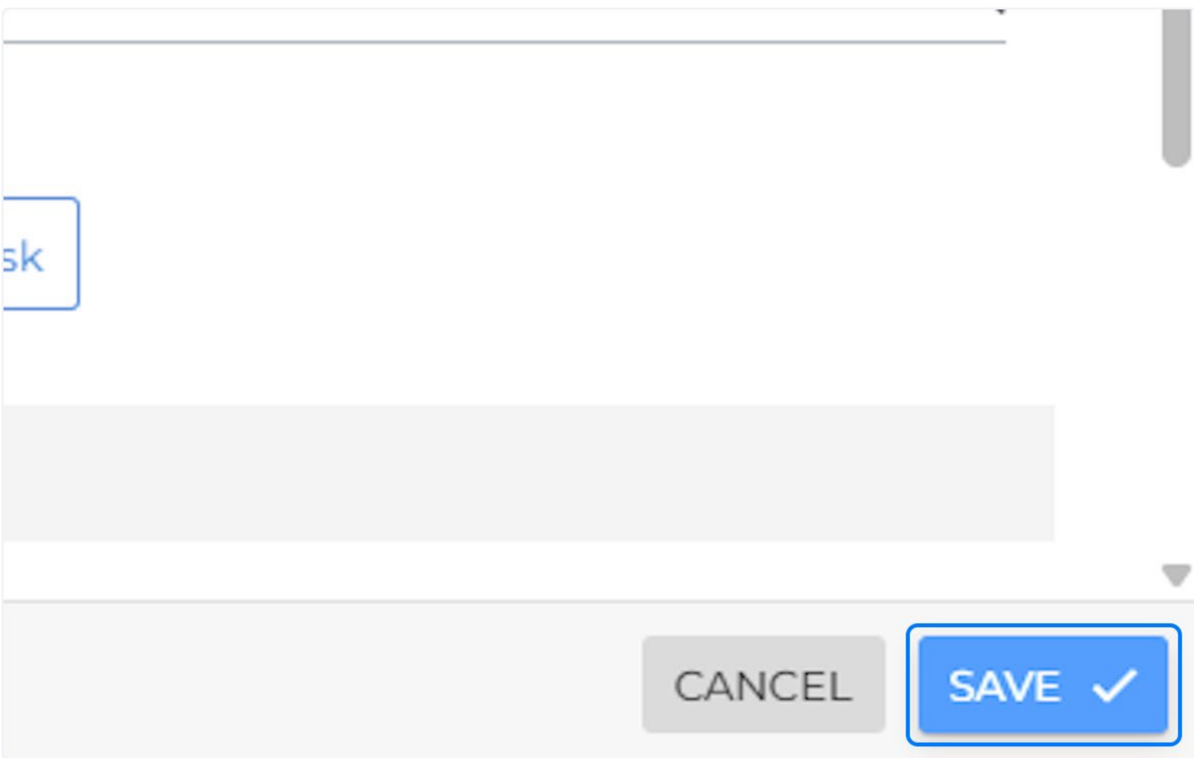


2. Click on Comments…

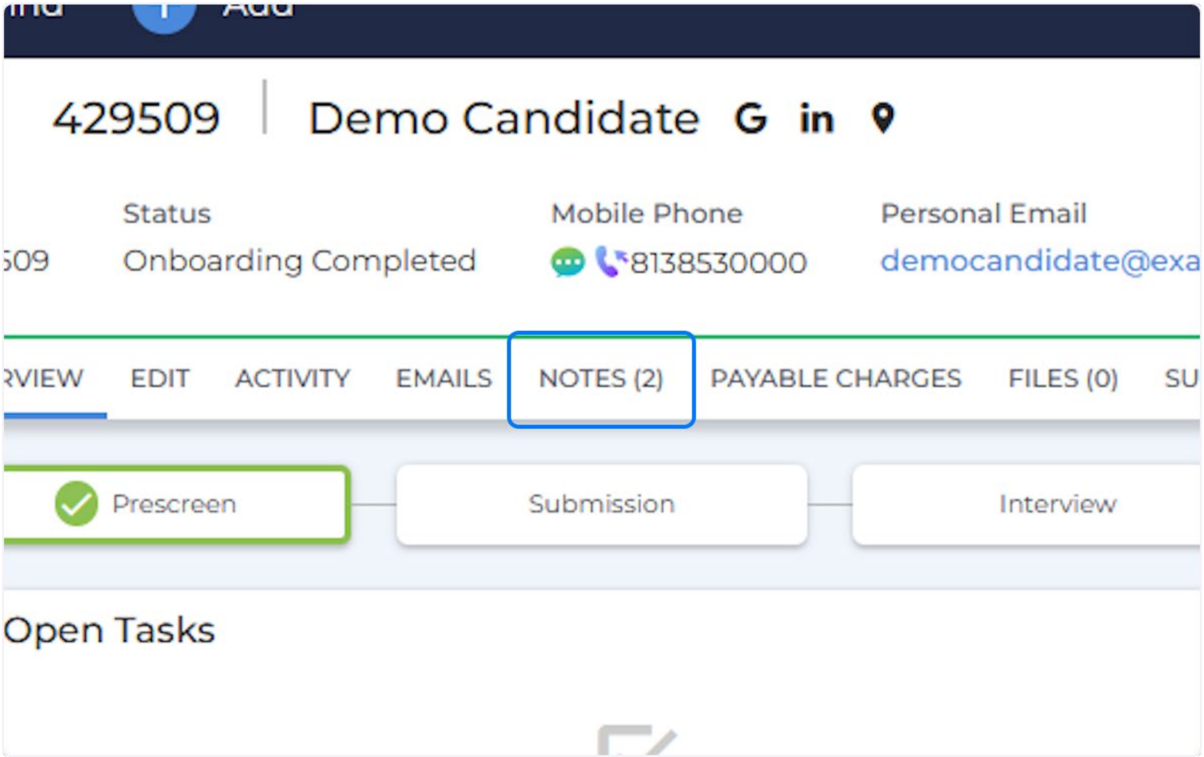
Note: If you would like to log a job order in the comments section to associate this note with other jobs that may be a potential fit, use the Hashtag symbol and enter the job title, then a list of jobs, will appear to choose from. **Ex. #Custmer service rep**



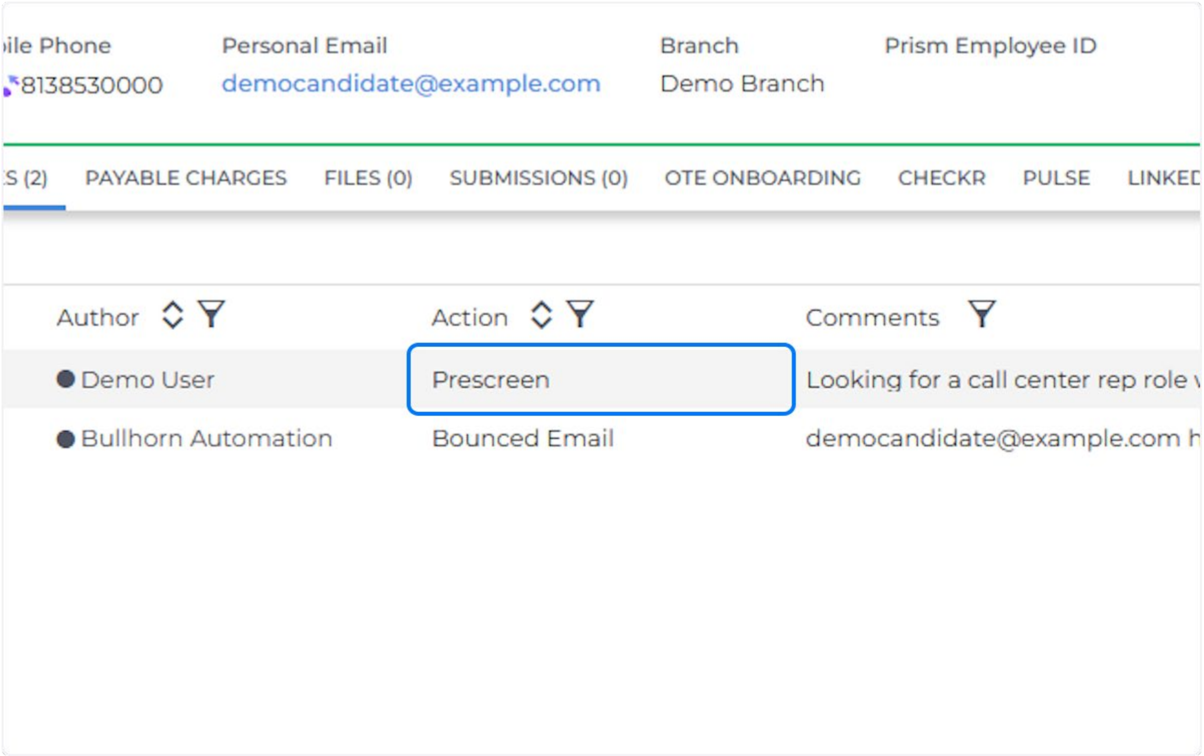
3. Click on SAVE



4. The Presceen note will now appear on the Notes tab on the candidate record. It will also appear on the job notes tab, if you tagged any jobs in the comments section.

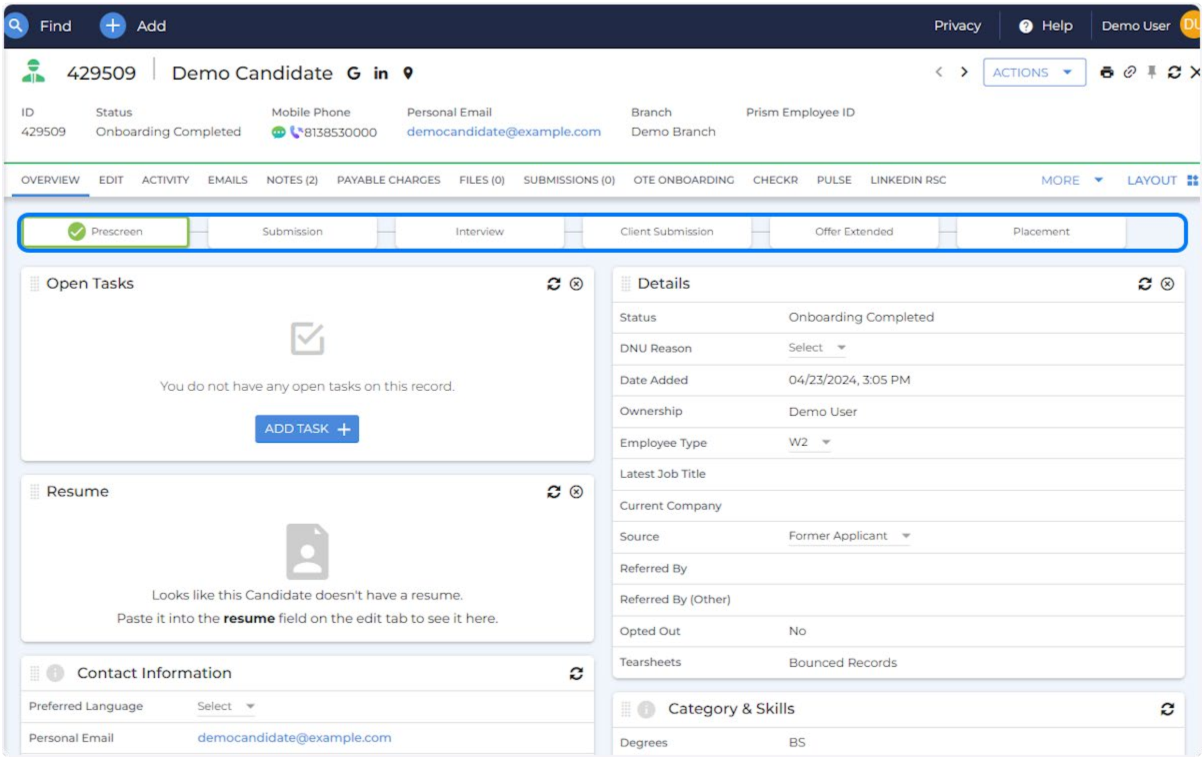


5. Click on Prescreen



6. As you go through the submission process, you will notice that the pipeline with stages for the submission process display a green checkmark as you go through the process.

Note: Each submission stage has their own statuses that can be worked through until you move a candidate to the next stage.



Next steps will cover creating a submission which is the first step in the process, this will begin with pipelining. On this example, we will use a job record to process the submissions. However, they can be created on a candidate record as well.

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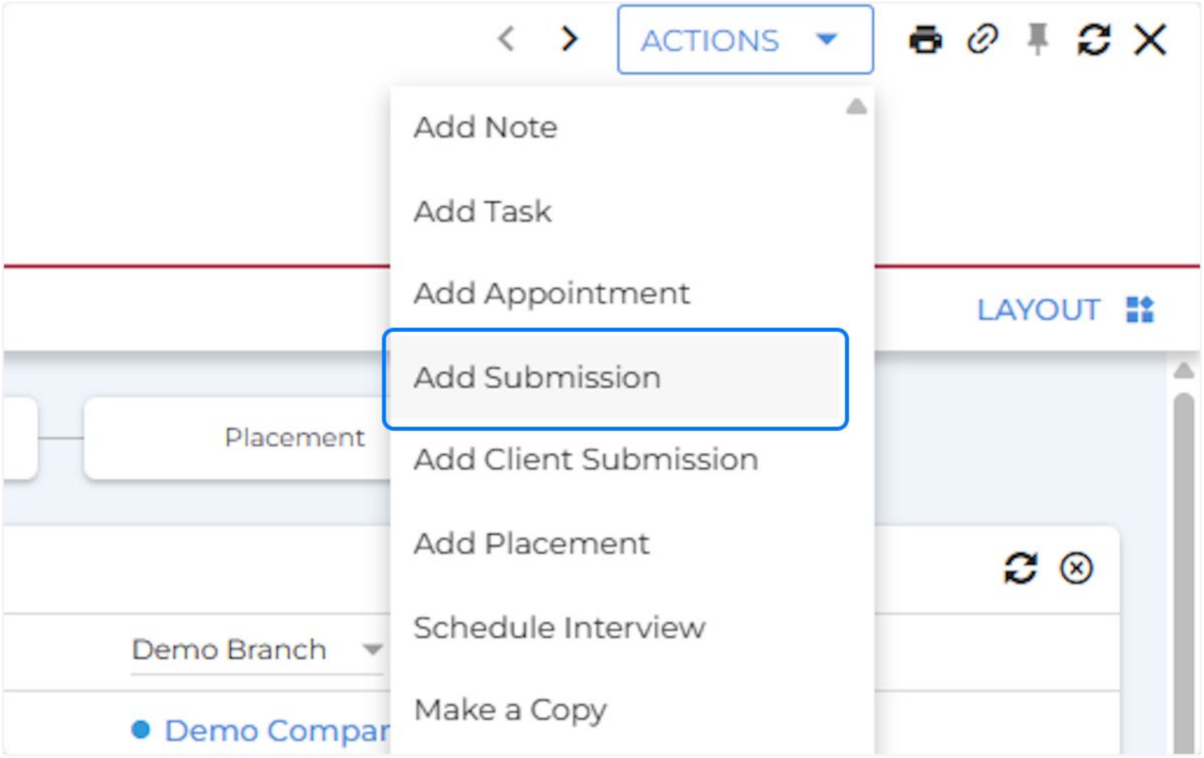
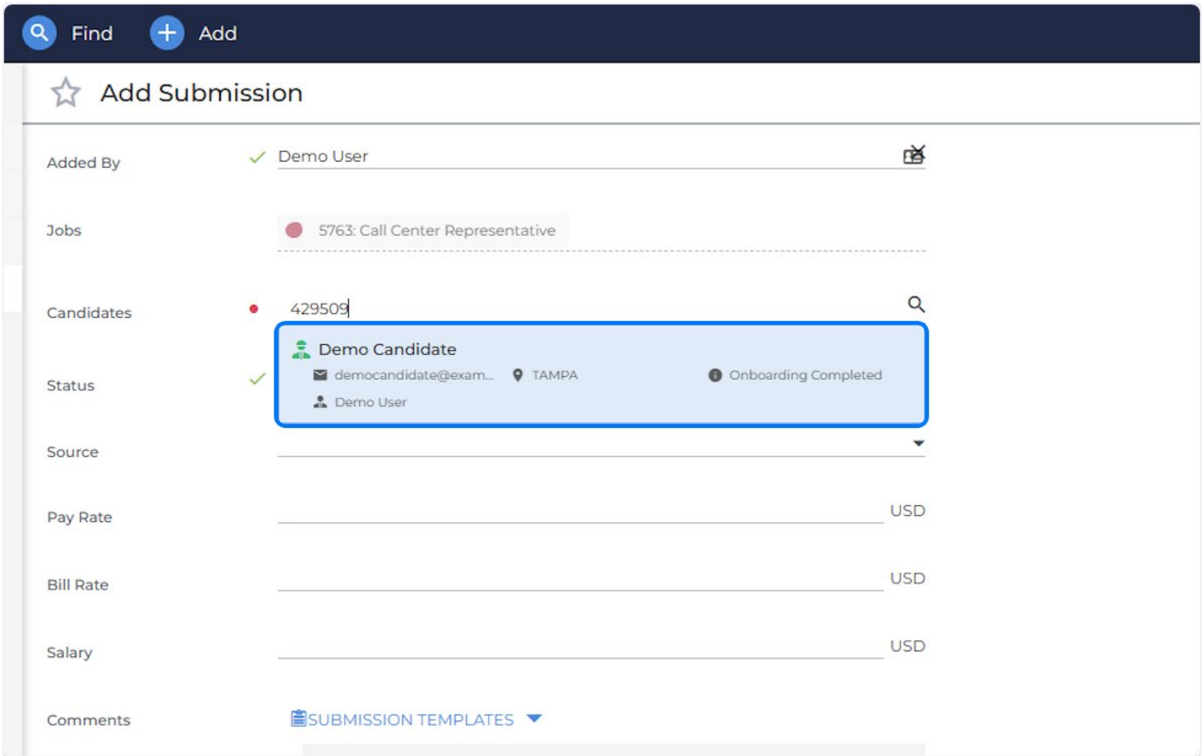
7. Click on the ACTIONS dropdown button and then select Add Submission.



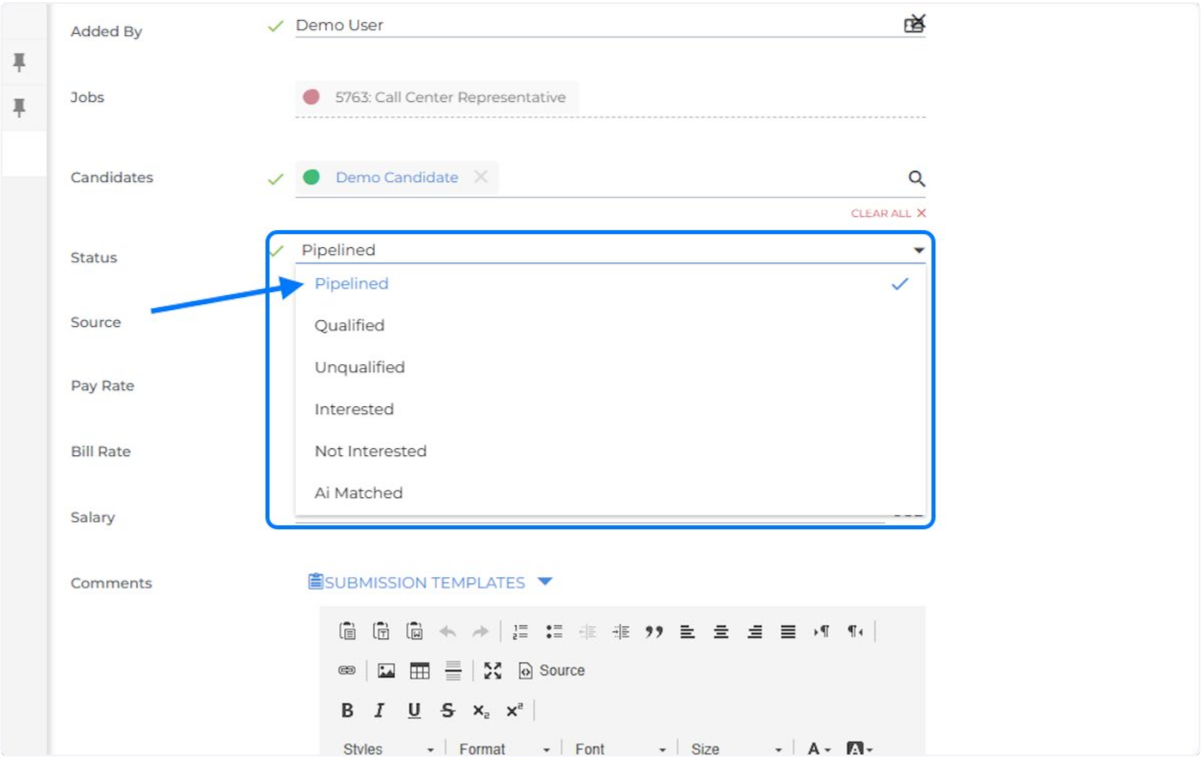
8. Search for the candidate(s) you wish to add to the submission. You can search by using the candidates full name or their candidate id number.

Note: You can add multiple candidates or jobs to a submission at one time.

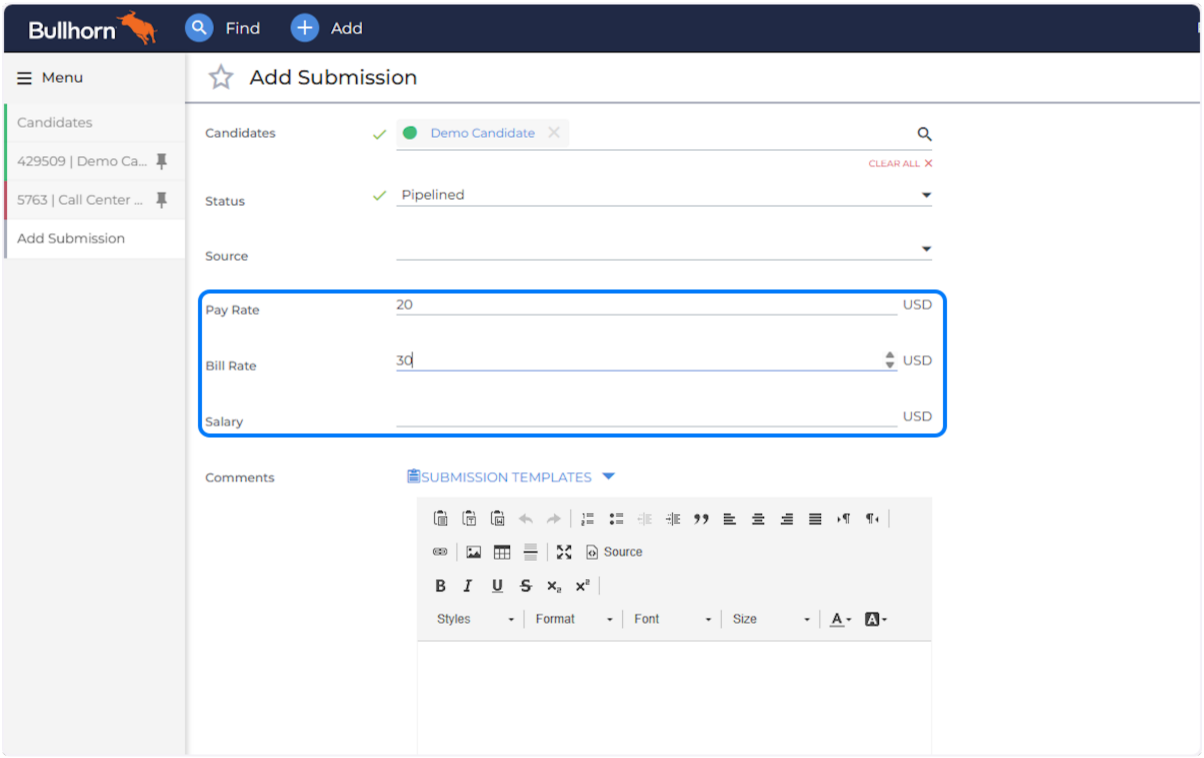


9. Click on the Status dropdown and choose the proper status for this stage in the process.

Note: Regardless of the stage set here, the submission will be listed as an "Internal Submission" in Bullhorn Analytics. It will not distinguish by the status.

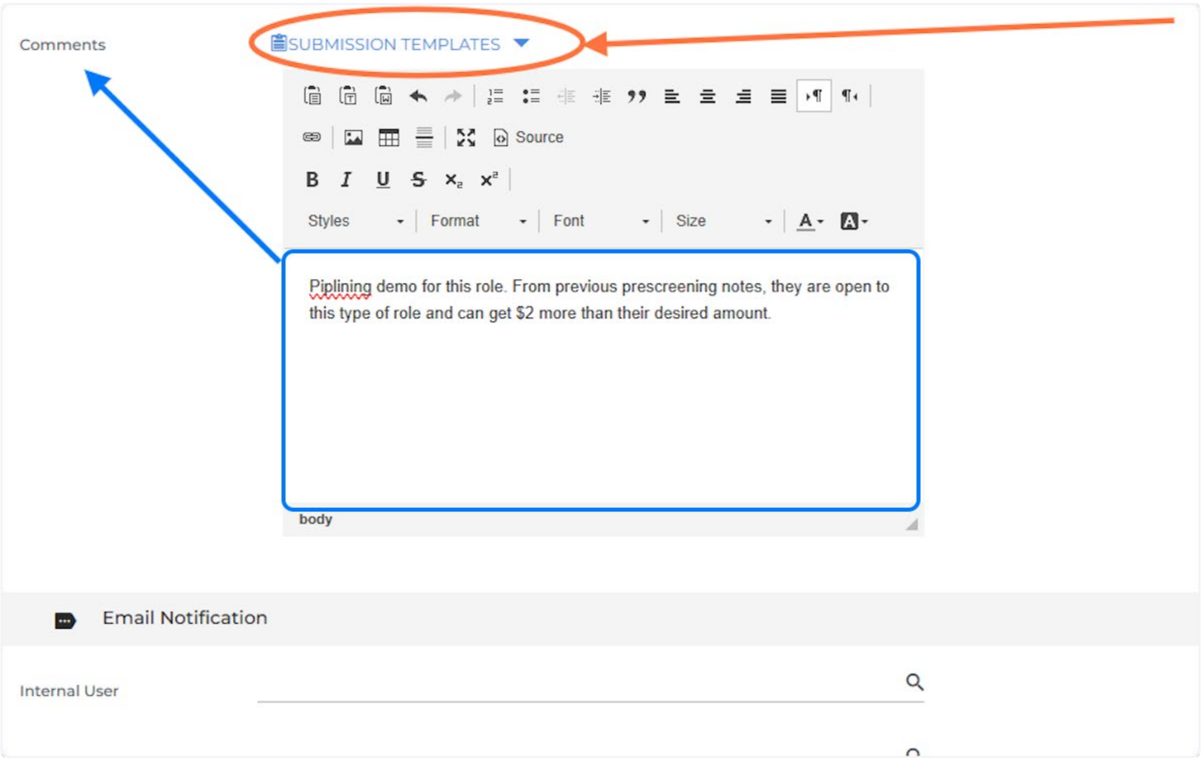


10. If you would like to track the rates discussed with the candidate, you can enter the pay, bill rate and/or salary for each submission.

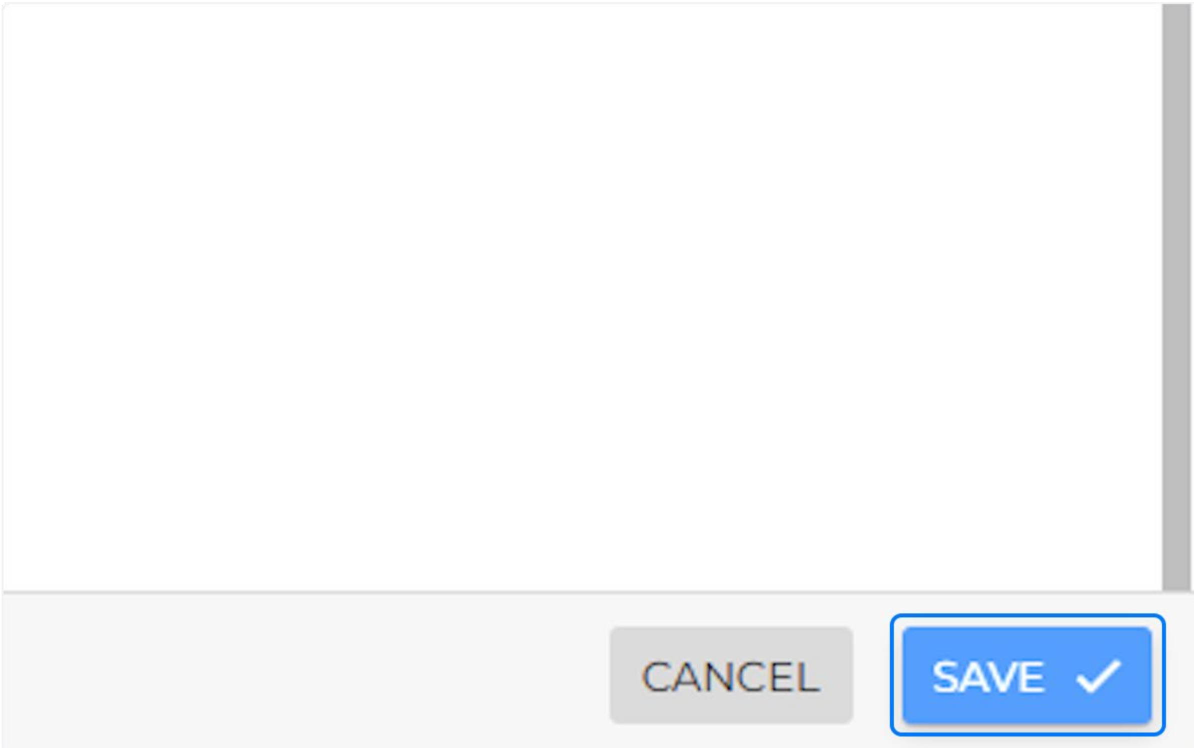


11. The comments section is the body or notes section of the submission and is used to log and notes, feedback or details that are important for the submission.

Note: You can create templates to shorten the process and create a streamlined logging process by using the Submission Templates link. (Circled in orange)

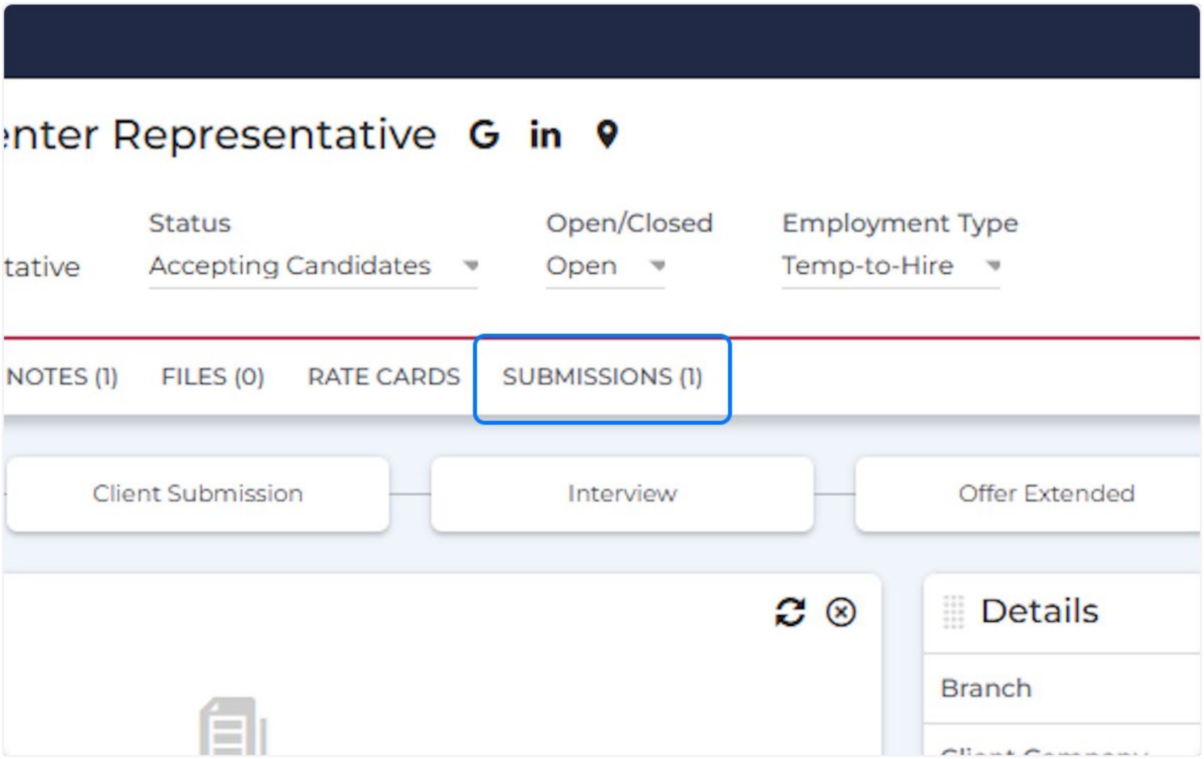


12. Click on SAVE



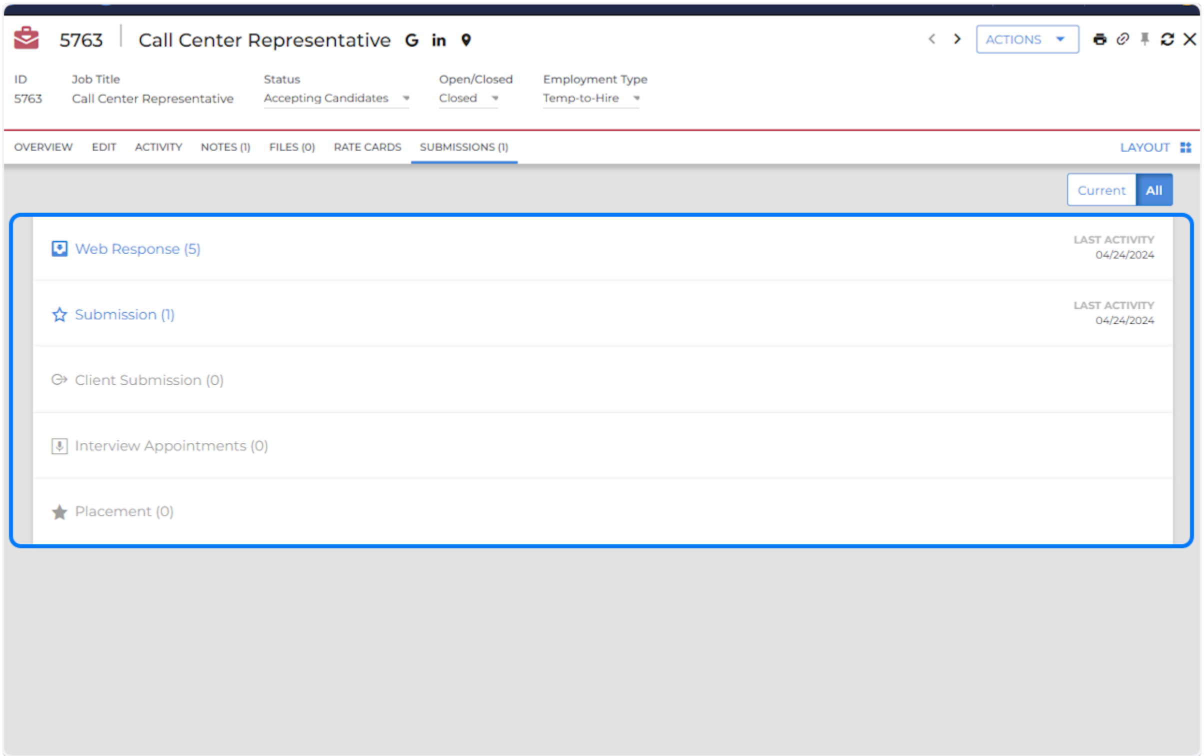
Next you will navigate tp the submissions tab where you can view all submissions within the stages.

13. Click on the SUBMISSIONS tab.



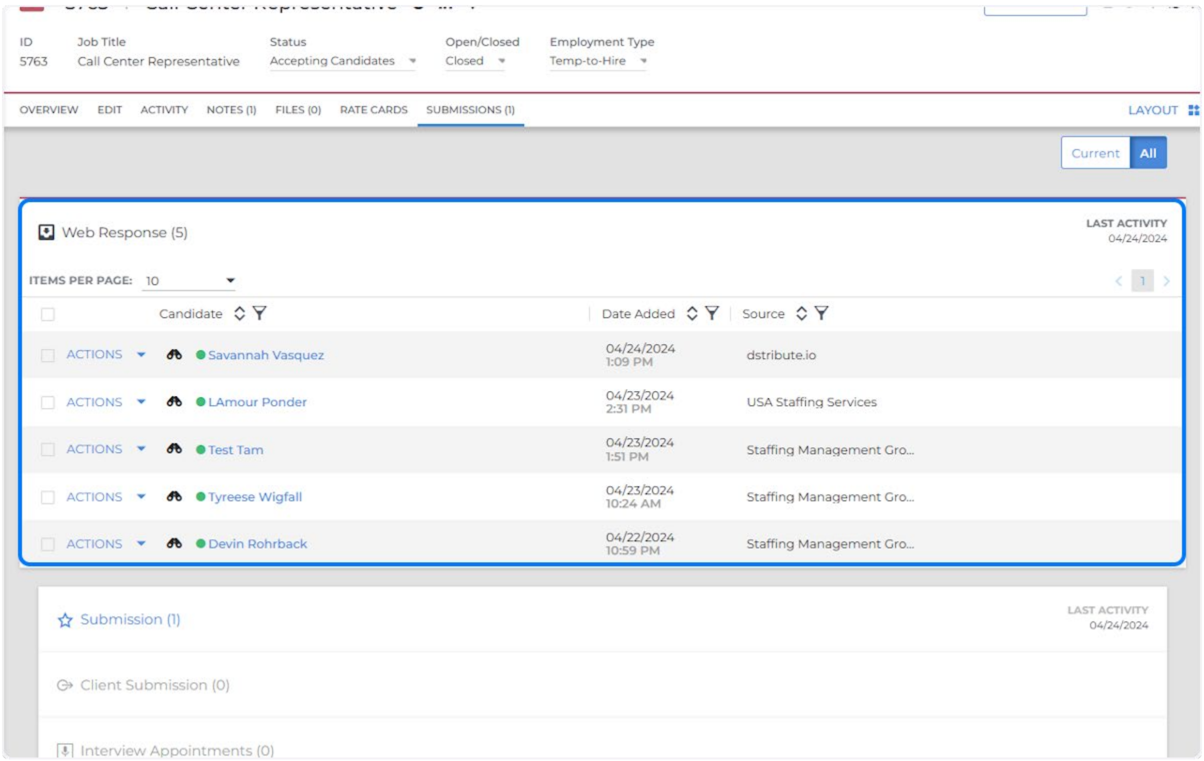
14. You will see a list of different phases of the submission process and can expand each section.

Note: Web Response = Web Application Submission

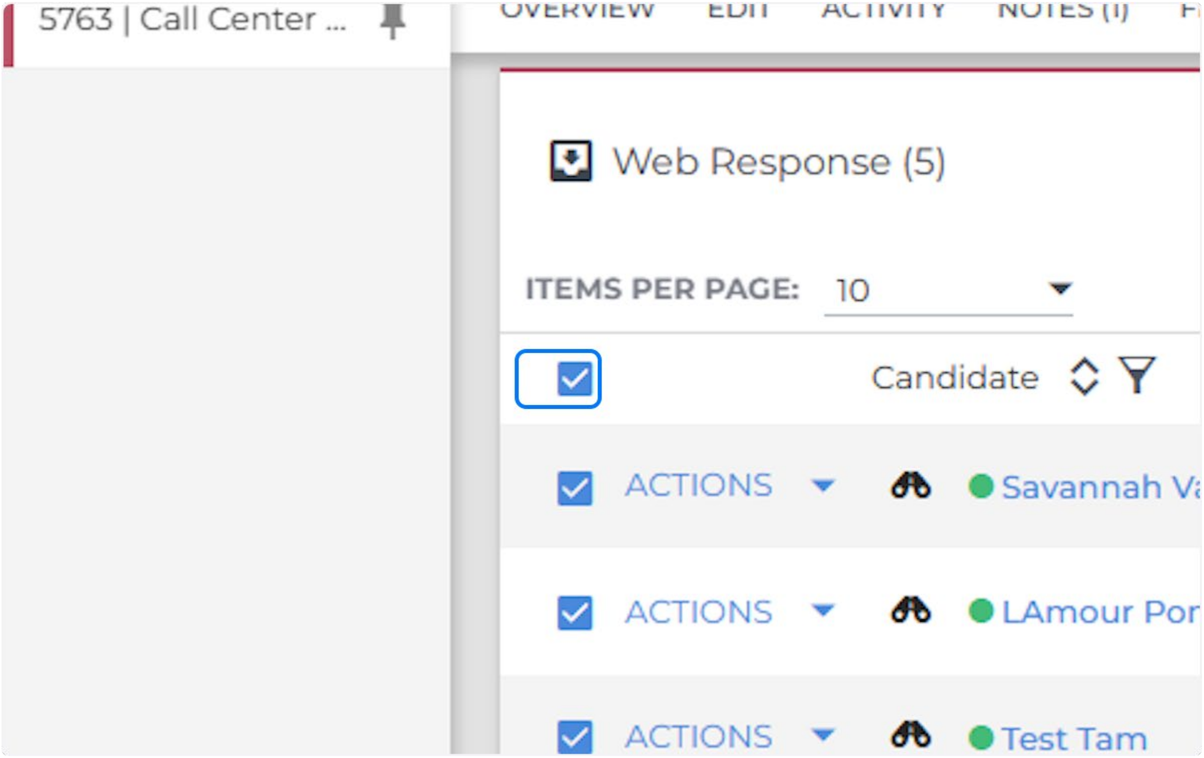


15. Click on the Web Response section to expand the current applicants who are still sitting in the untouched Web Response section.

Note: You will want to make a web response to a submission and mark them to an appropriate status so you can keep your web response data updated and accurate.

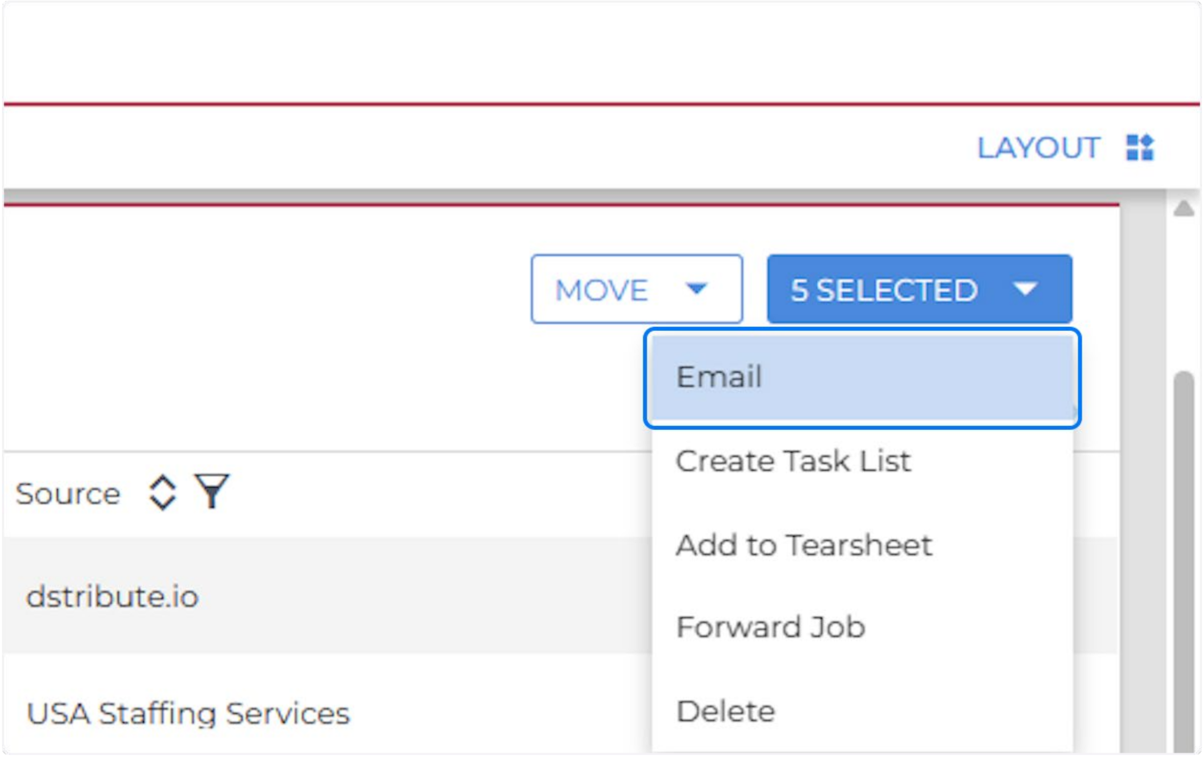


16. To take mass action for all records, select the checkbox in the top left of the candidate list.

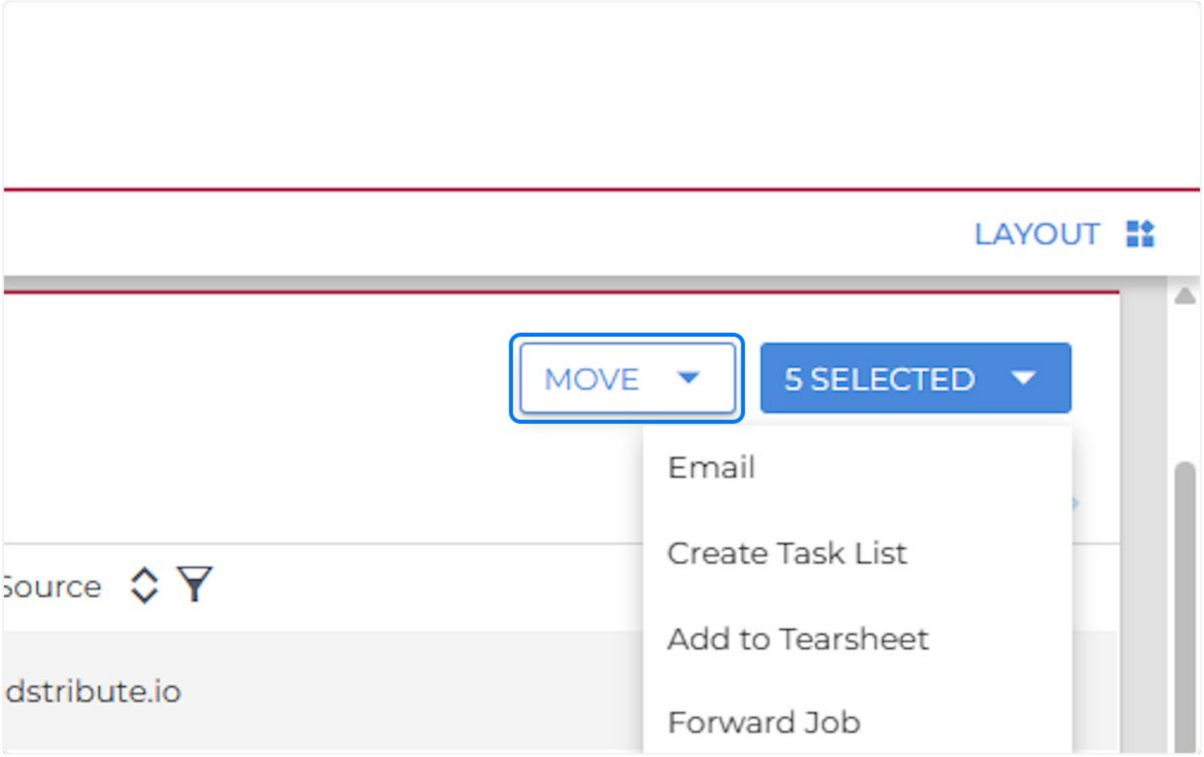


17. Then click the SELECTED button and choose any of the mass action items.

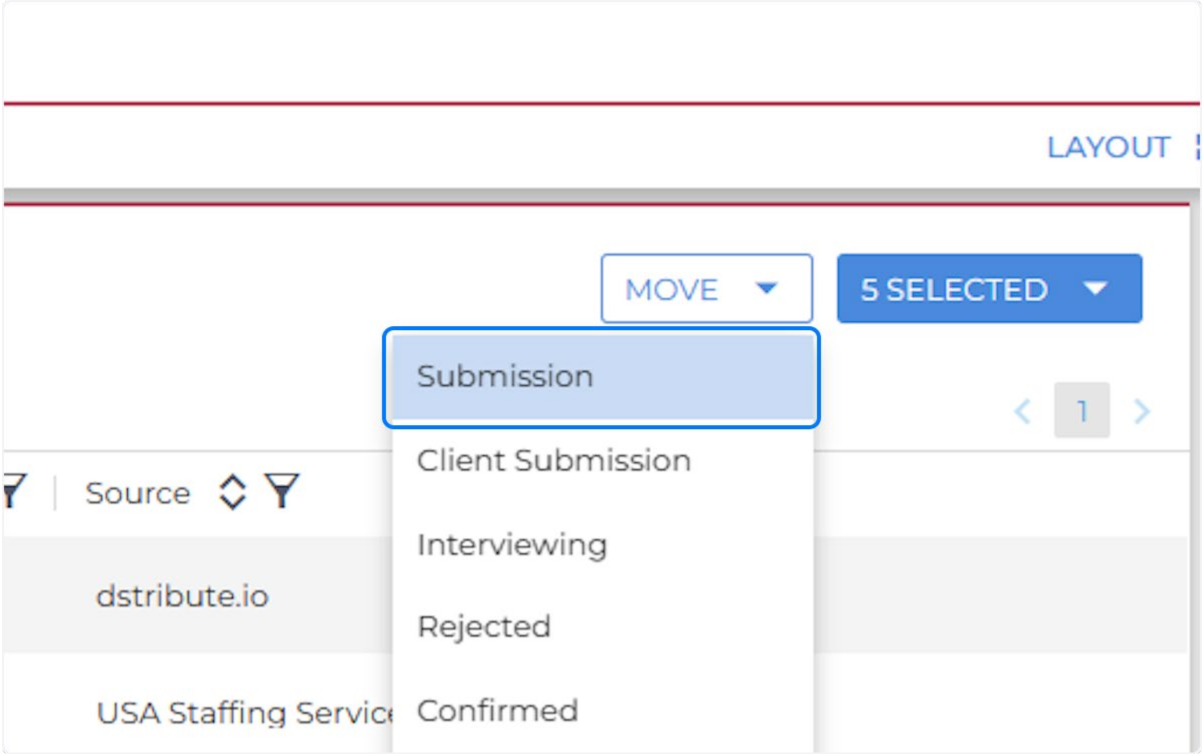
Note: Selecting Delete from the list will not delete the candidate record. It will remove them from the web response list.



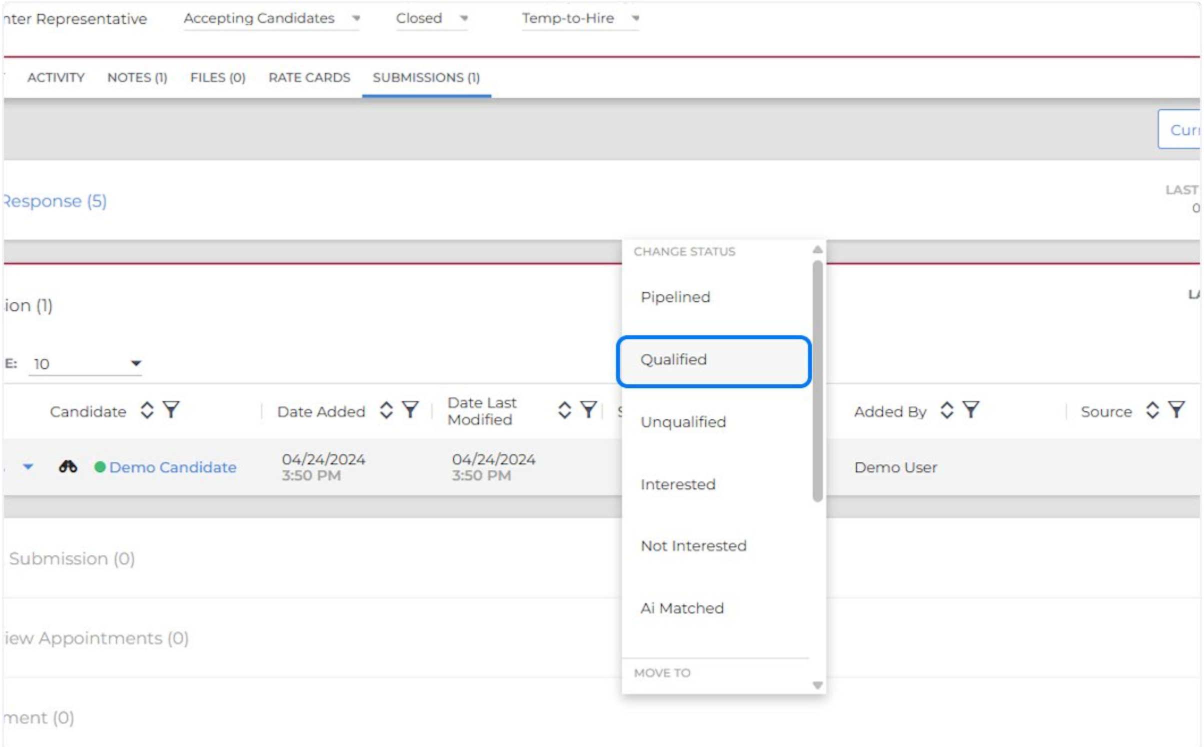
18. To move the candidate(s) to a submission status, click the MOVE button.



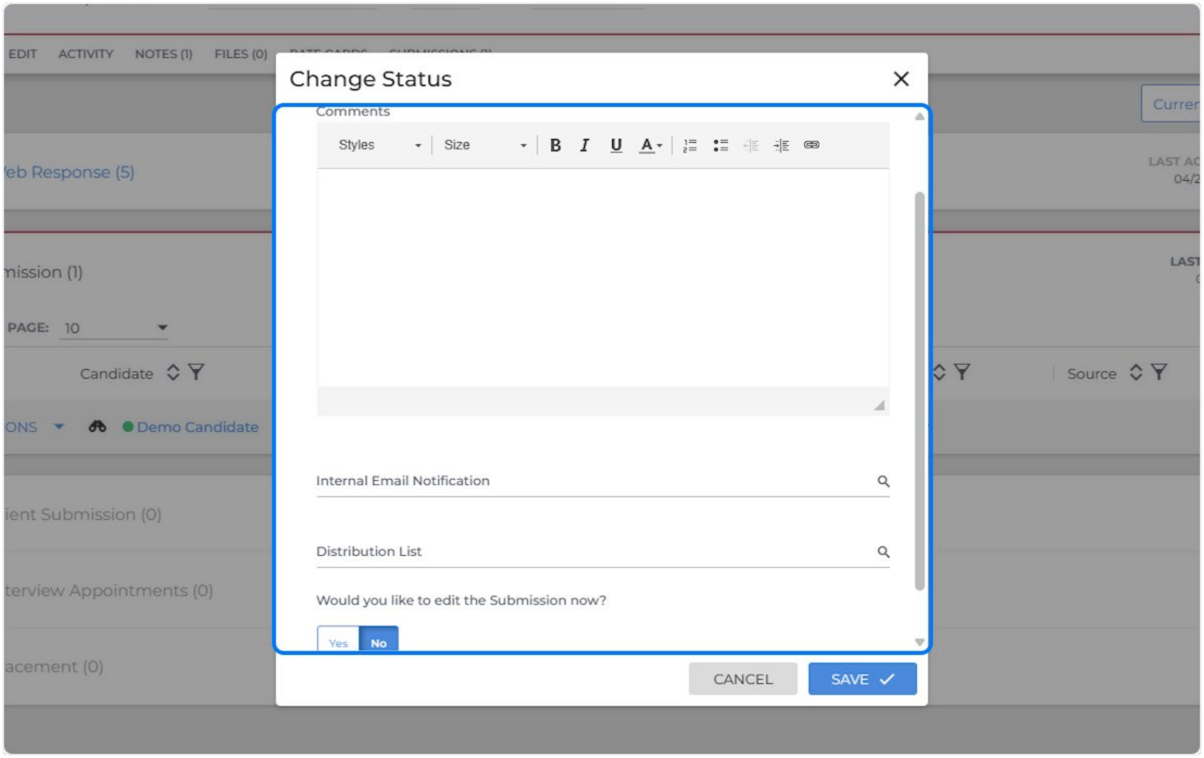
19. Then click on Submission. This will default the submission status to Pipelined.



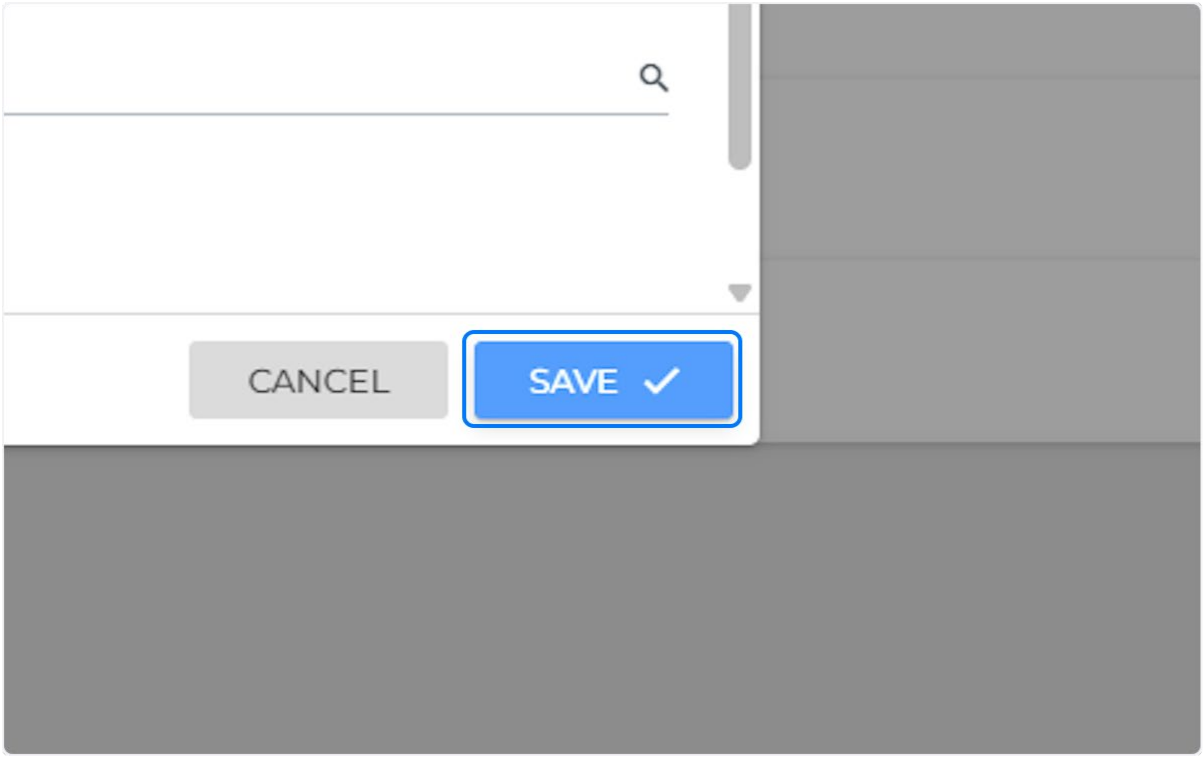
20. Now that the candidate is in the Submissions section, you can take them through the proper statuses within this stage. Click on the Status column and change the status accordingly.



21. Leave any comments necessary and choose to update the submission information such as Pay,Bill Rate or Salary.

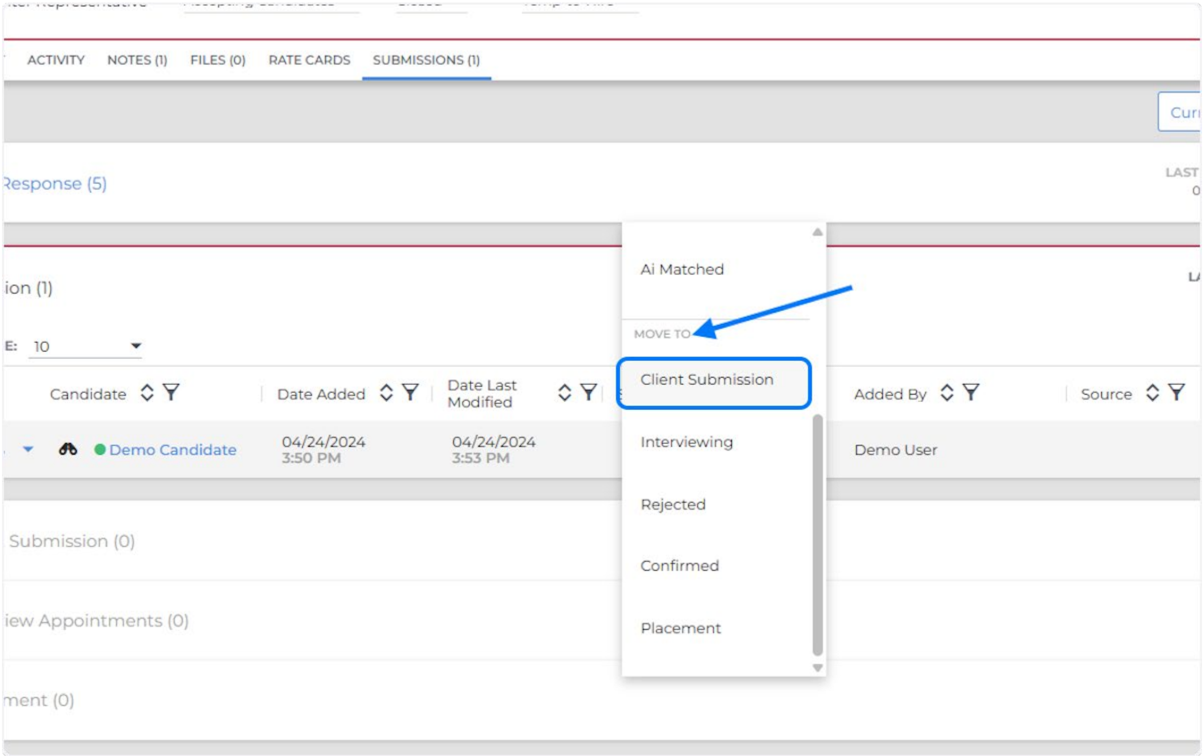


22. Click on SAVE.

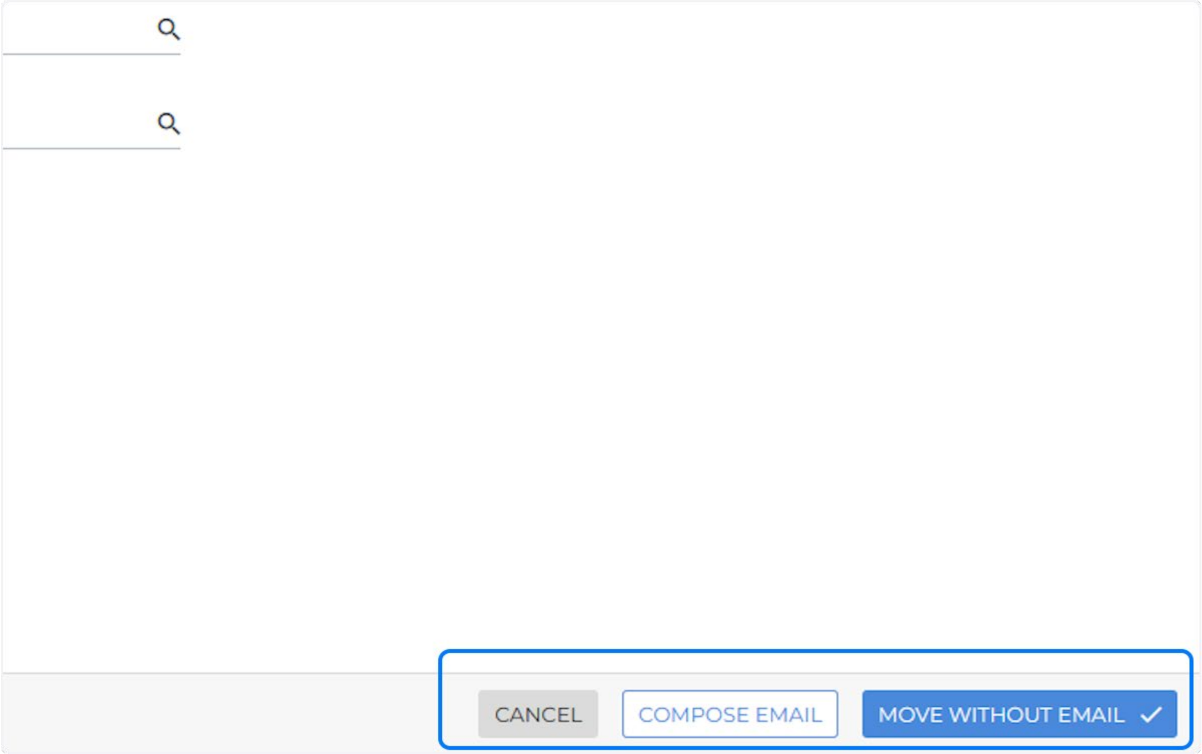


The remaining steps in the submission process are dependent on your workflow. However, the most common next step is either Client Submission or Interviewing.

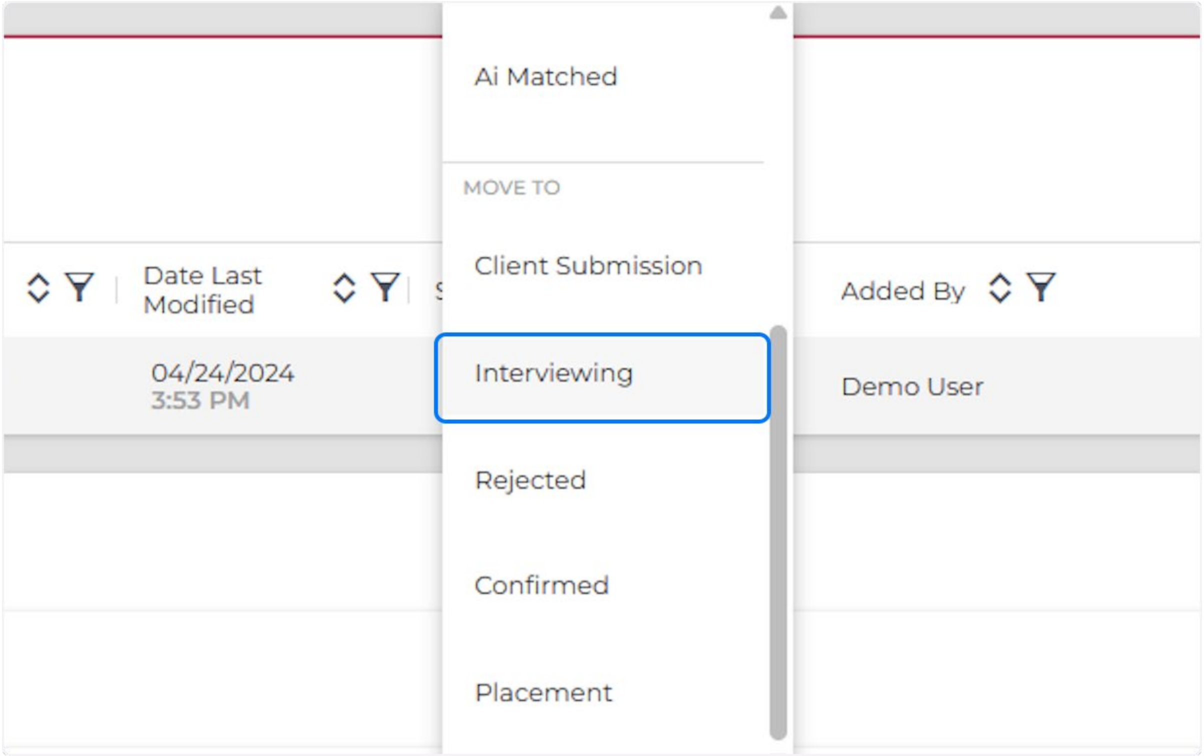
23. From the Submission section, click on the status and scroll down the list past the "Move To" section and select Client Submission.



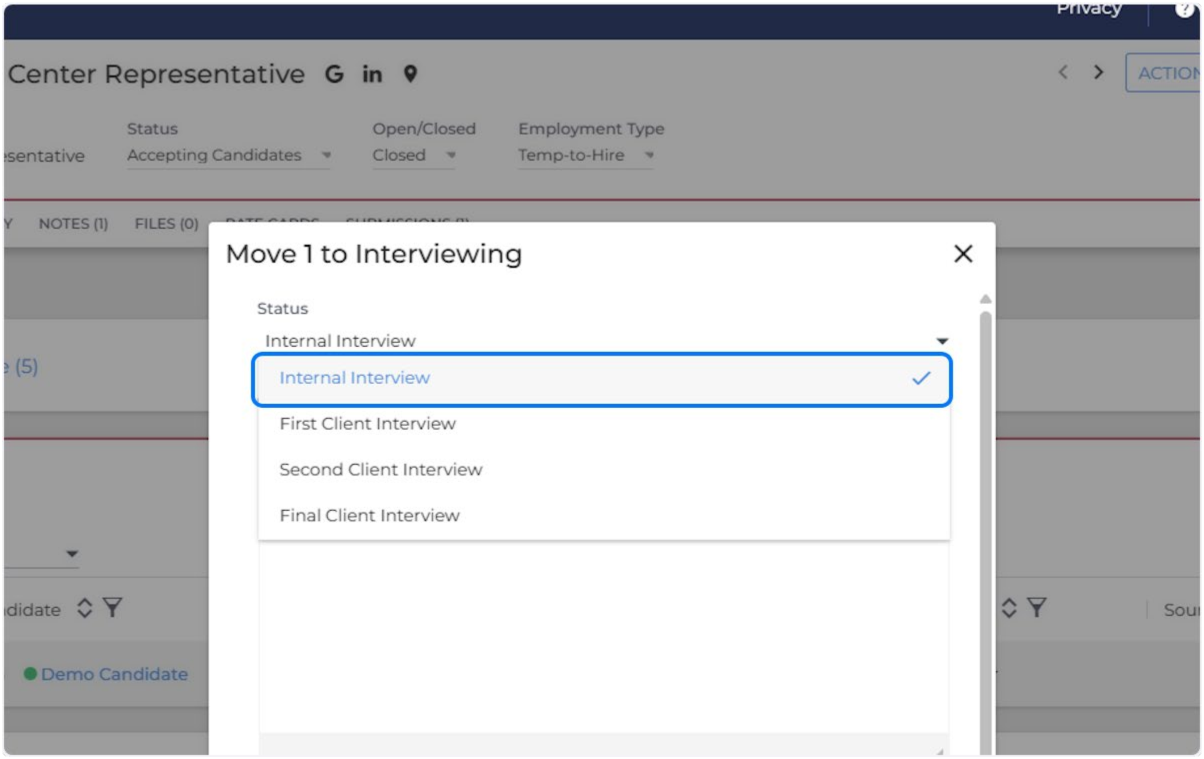
24. When creating a Client Submission, you have 2 actionable steps: Move to this stage without sending the contact an email or compose an email to send the client contact their resume.



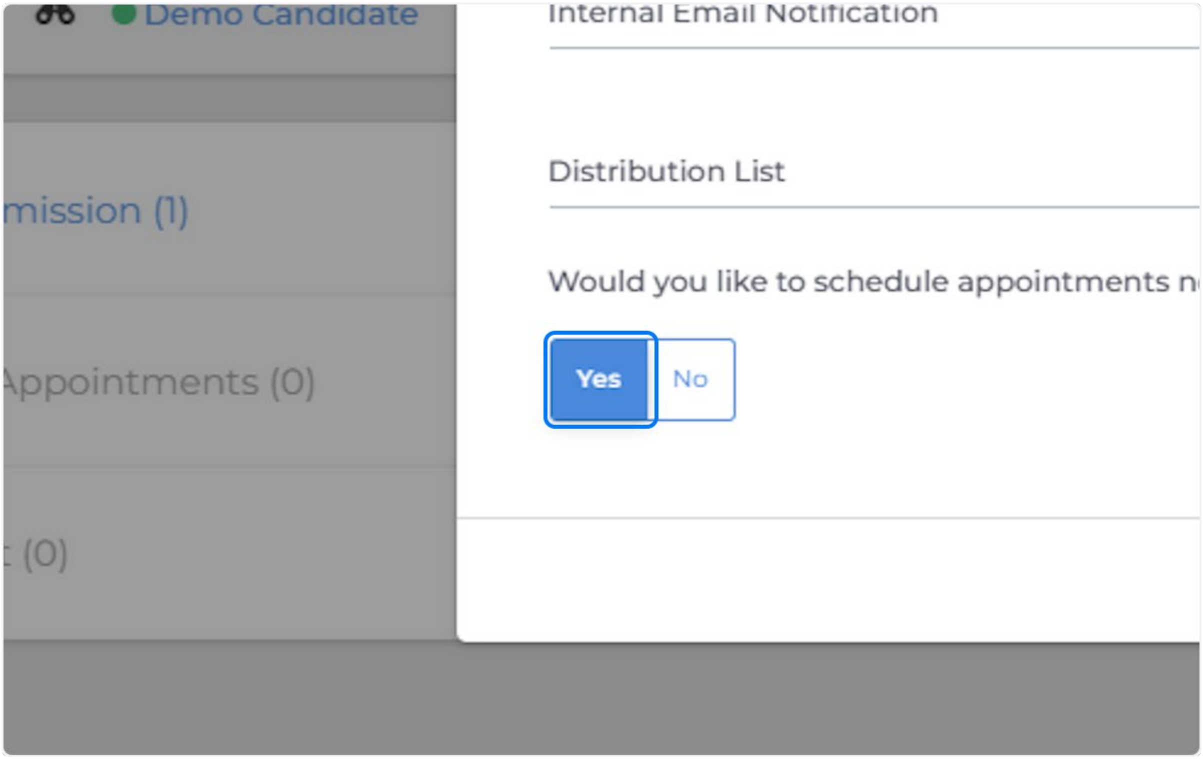
25. Once you move a submission to the Interviewing stage, you will be able to schedule an interview meeting directly in Bullhorn.



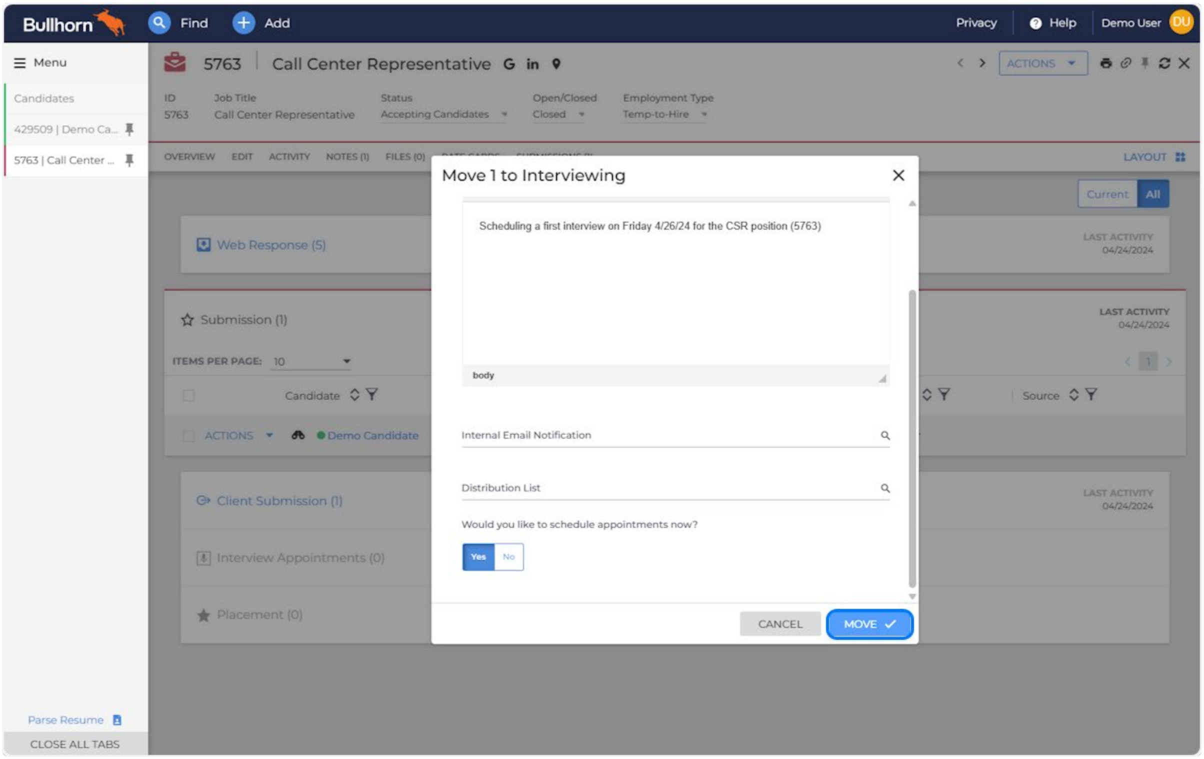
26. Choose whether the status of this stage is an Internal Interview with your company, or one of the 3 interview options with the client directly.



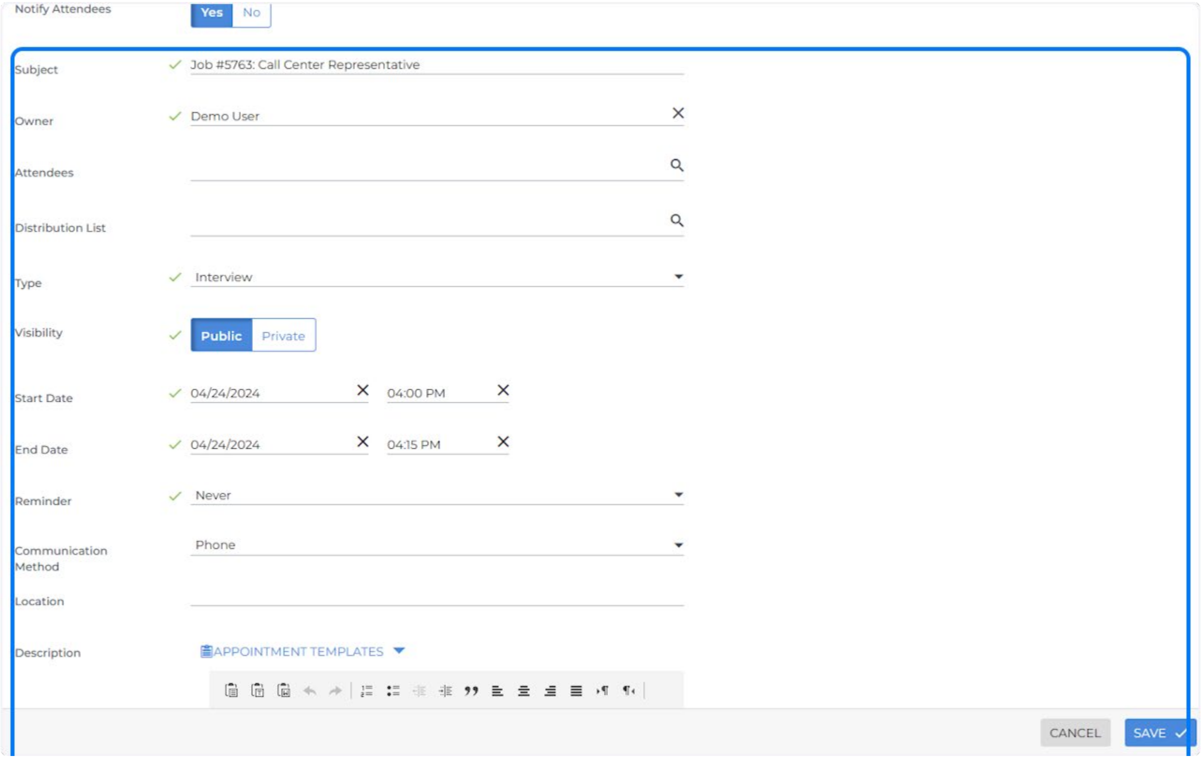
27. Click on Yes to schedule the calendar meeting. If you do not want to schedule a meeting and wish to just update the submission, select No.



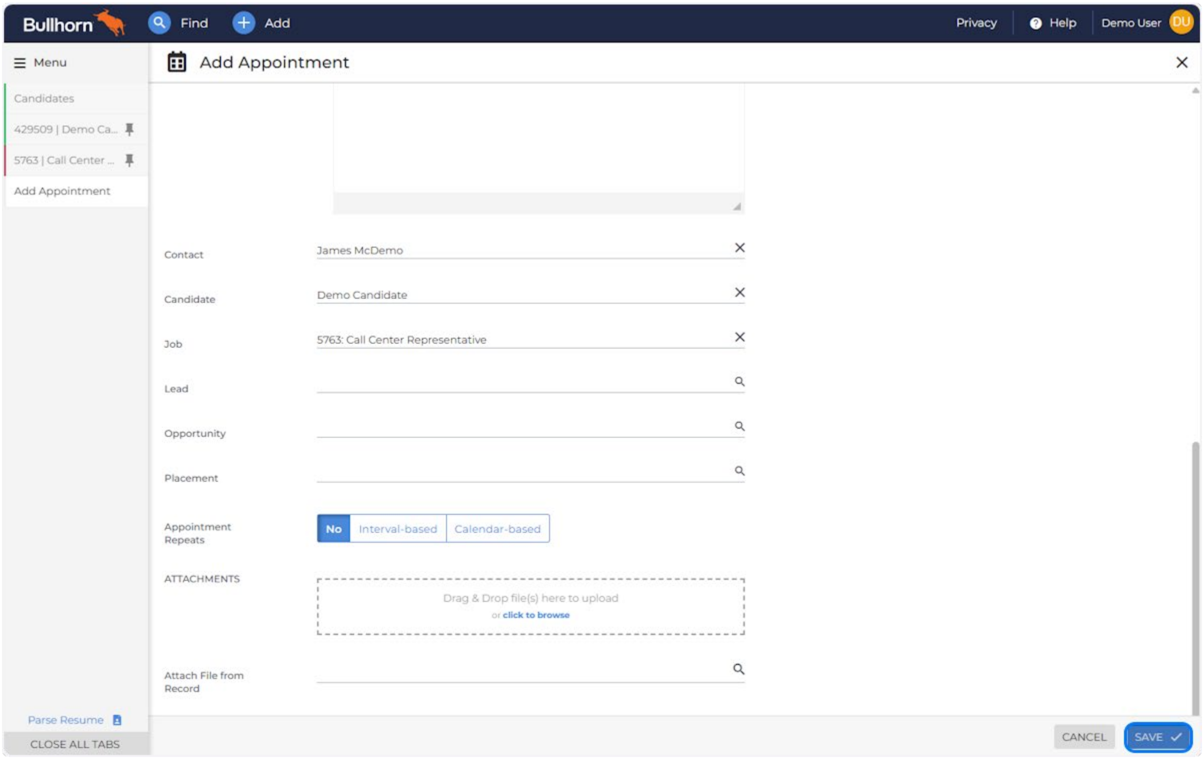
28. Once finished, select MOVE.



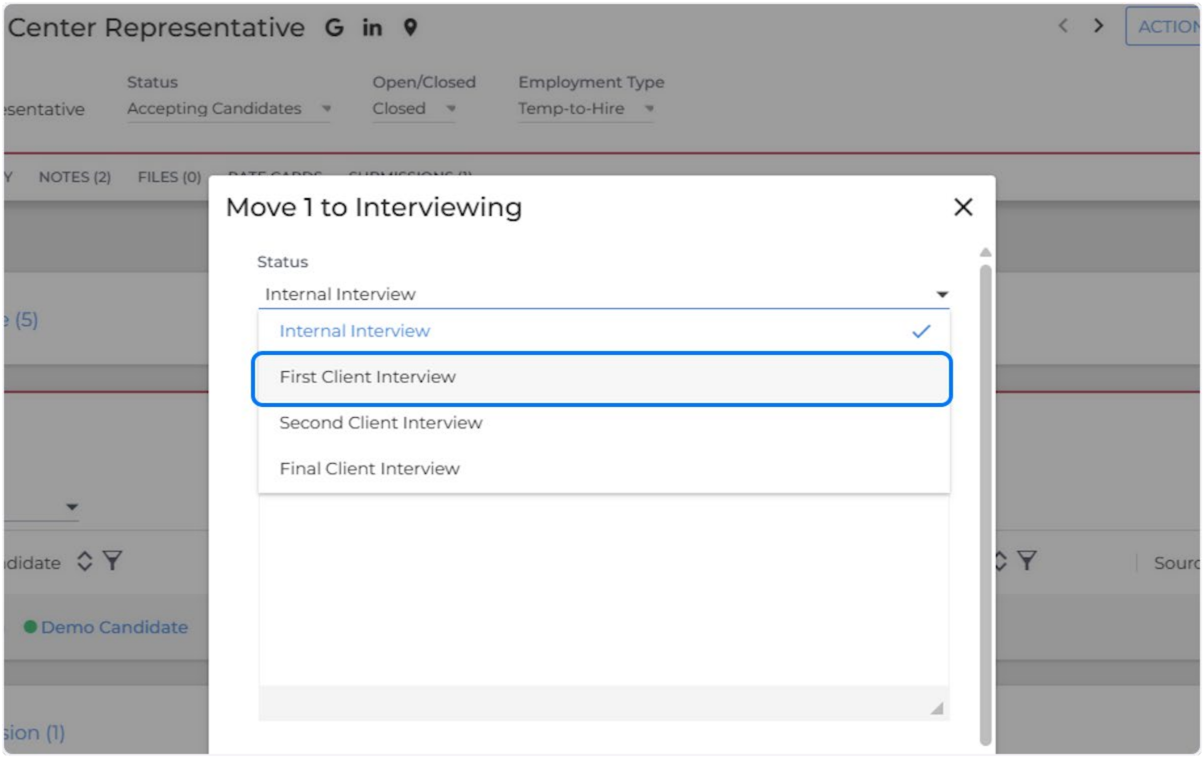
29. If you selected to schedule an interview, then the appointment creator page will open up automatically. This will sync with your Outlook calendar.



30. Click SAVE once you finished setting up the meeting.



31. If you wish to log both, an internal interview with the recruiter and an interview with the client, then change the status of Internal Interview to First Client Interview.



The next step is to extend an offer or a rejection, followed by the placement. Placements will be reviewed in a different process of steps.

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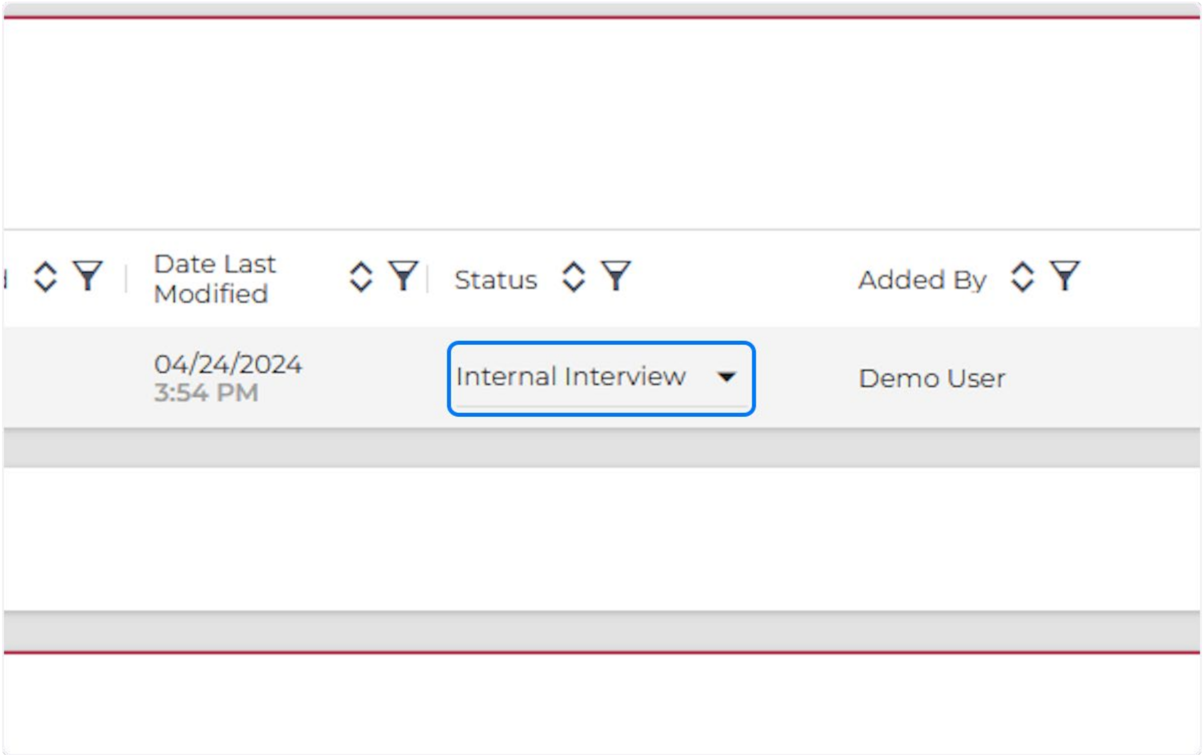
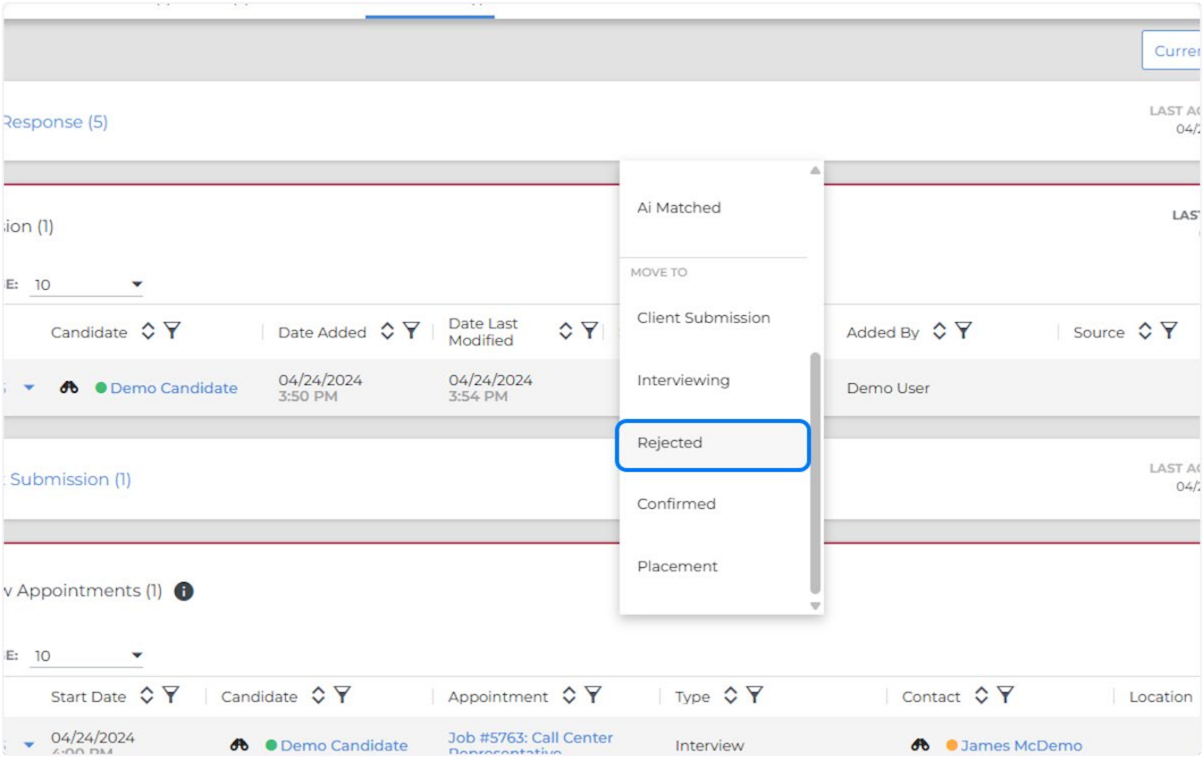
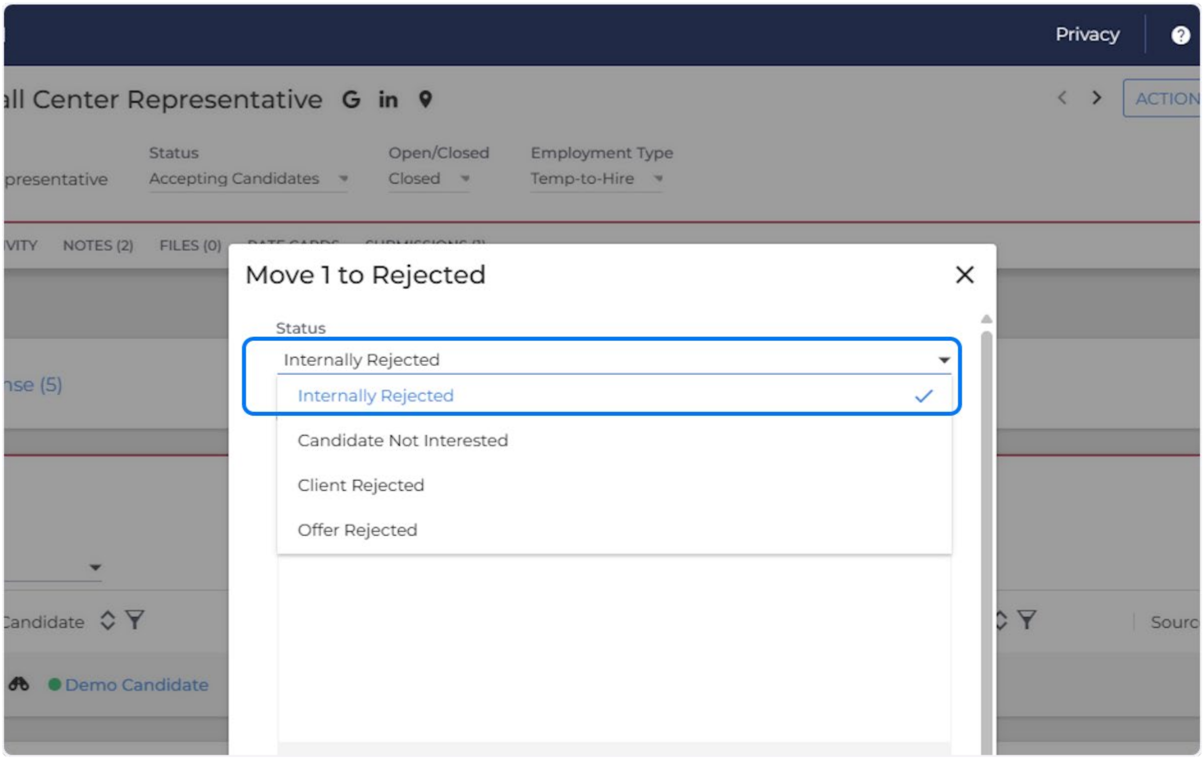
32. Click on the submission status.



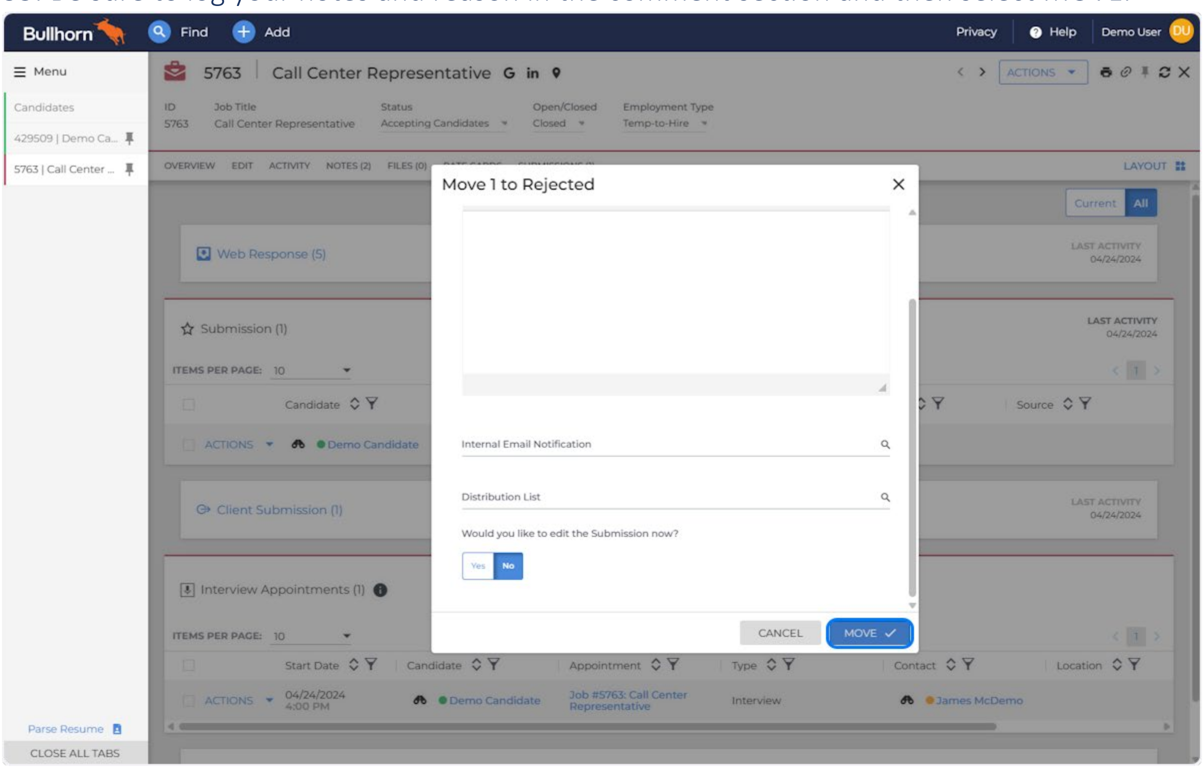
33. Move the status to Rejected, then select the status for this stage.



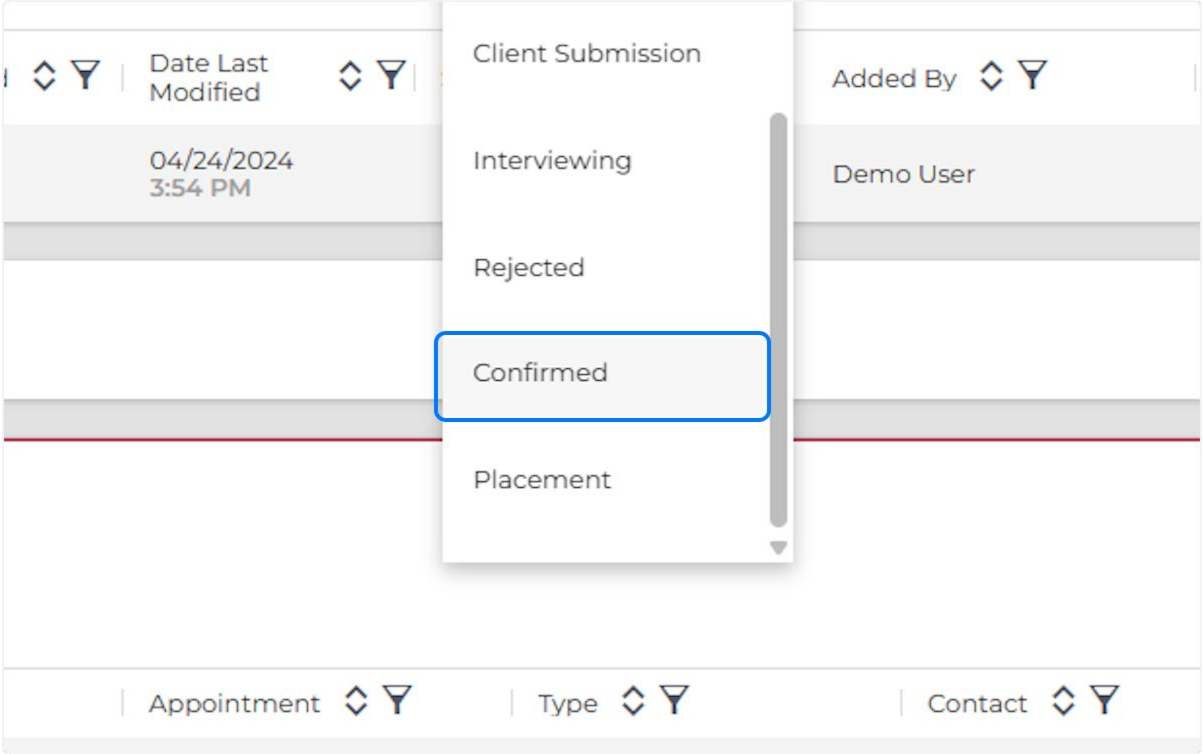
34. Click on the appropriate status from the list show below.



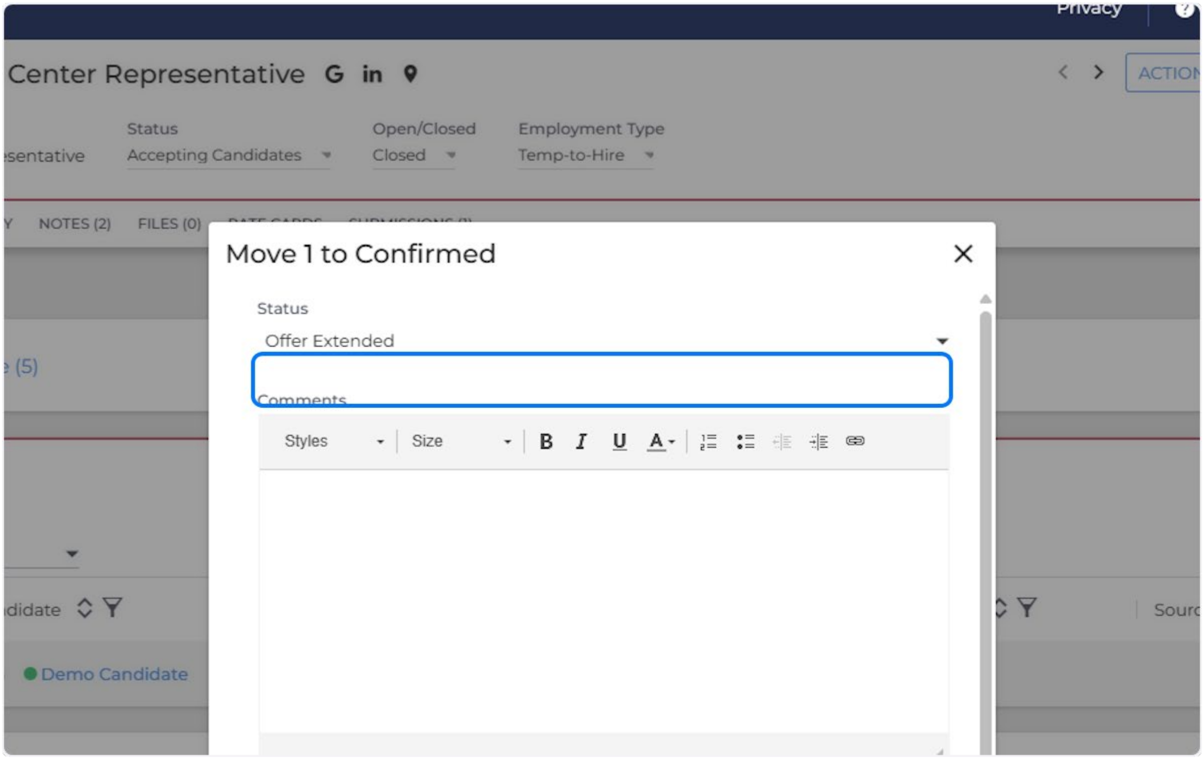
35. Be sure to log your notes and reason in the comment section and then select MOVE.



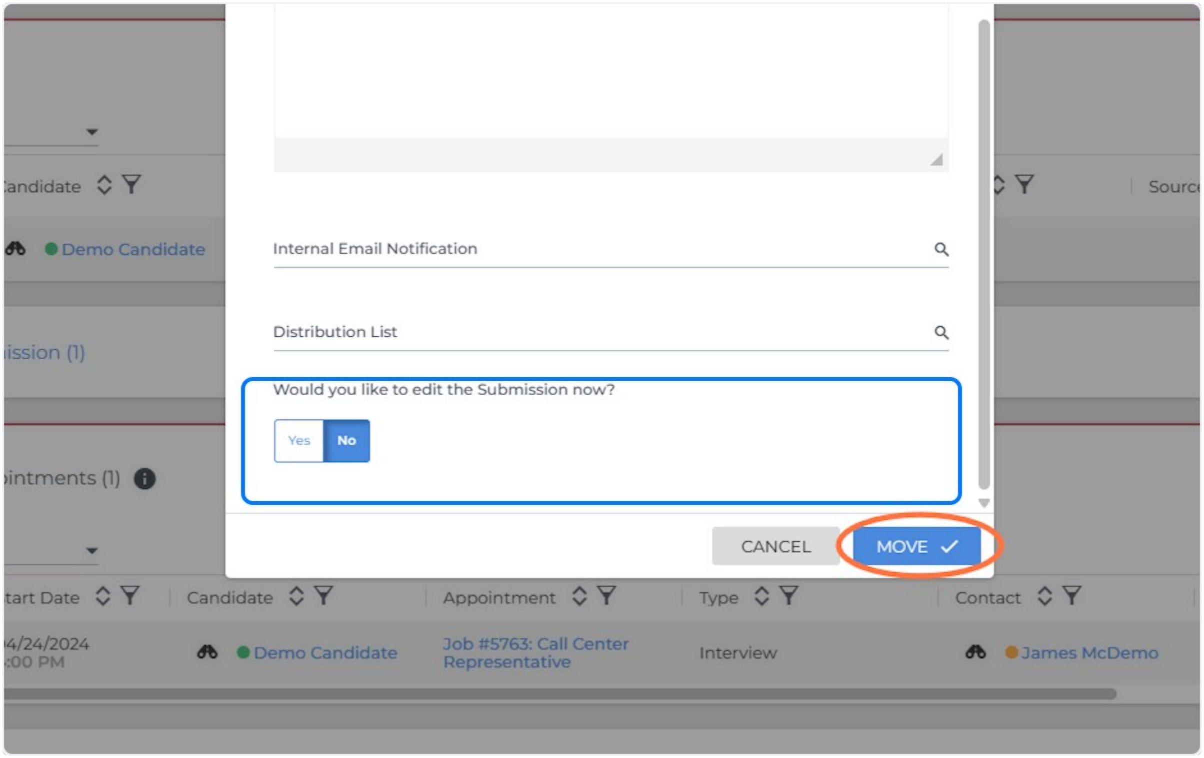
36. If extending an offer to the candidate, then select the status dropdown and click on Confirmed.



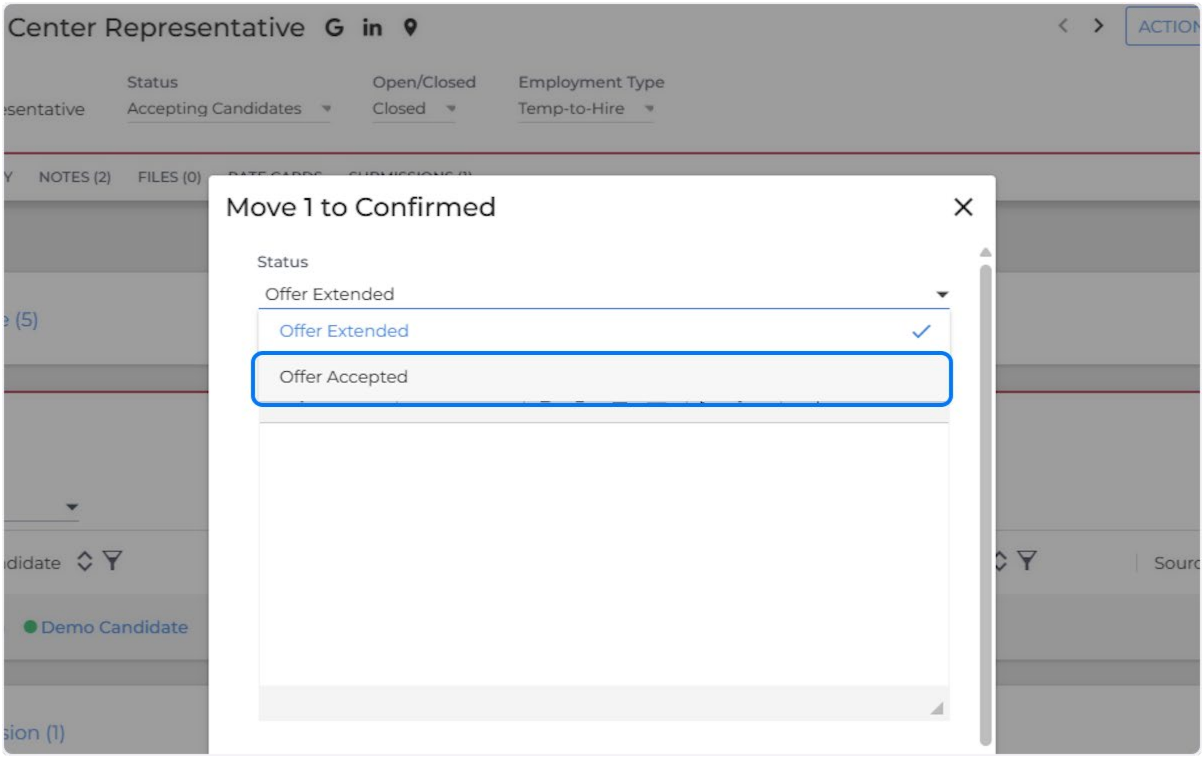
37. Click on Offer Extended as the status.



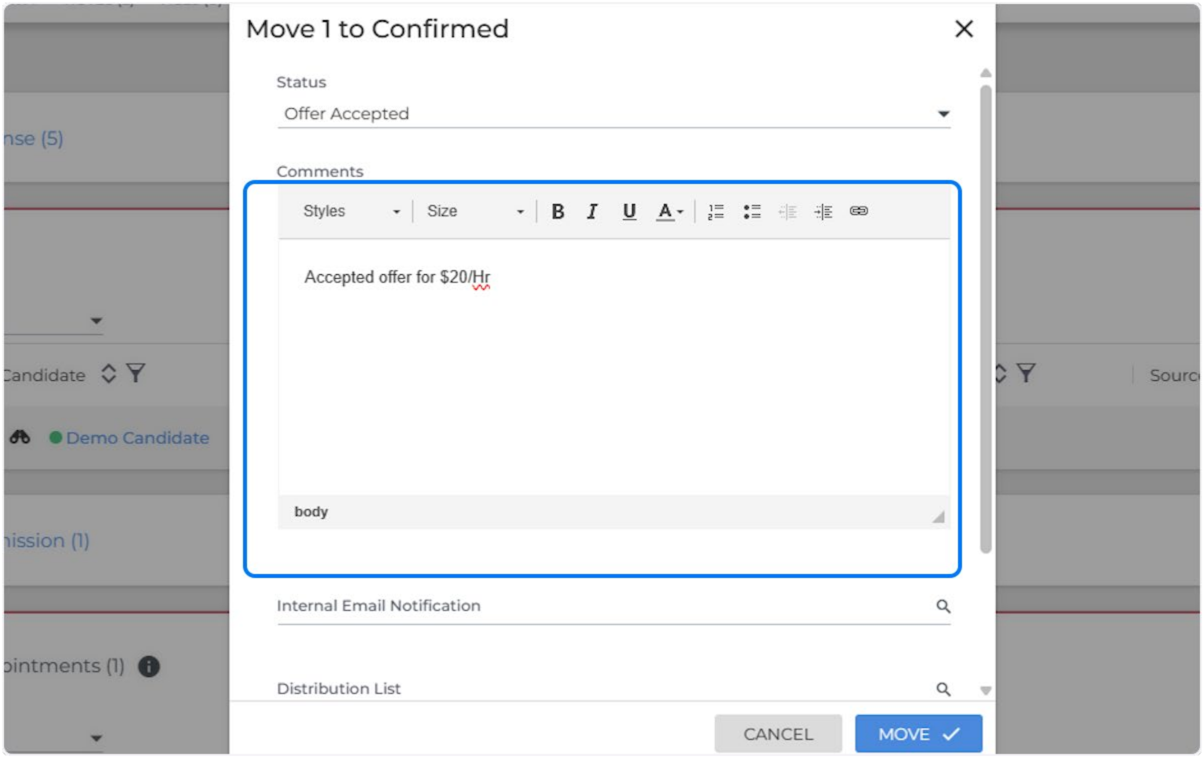
38. Update the submission if would you like to edit the pay rates and bill rates for tracking purposes. Then click MOVE.



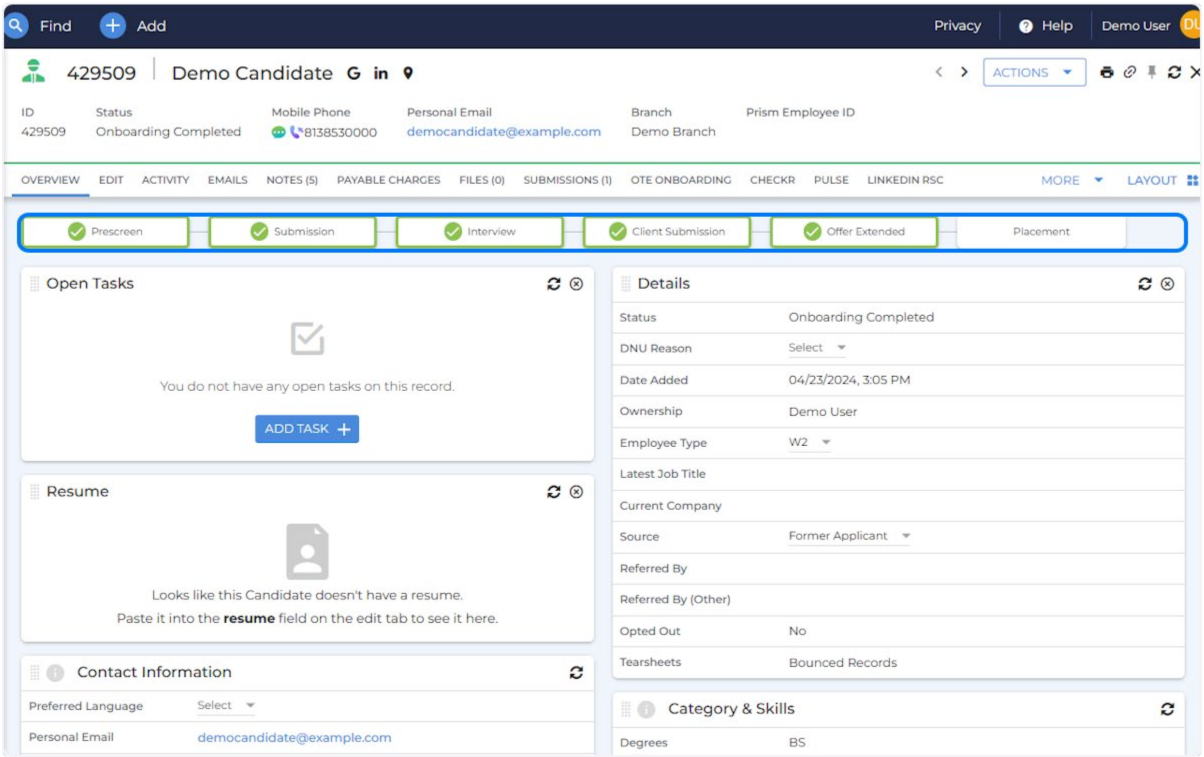
39. To track the offer being accepted, follow the previous steps for extending the offer, then select Offer Accepted as the status.



40. Add any notes into the Comment section.



41. You will now notice that all stages in the pipeline have moved to a green checkmark, meaning they have been completed.



Viewing Submissions in Mass via Lists

You view and update submissions in mass by viewing them from the Submissions tab on a candidate, company,job record or the Submission list view.

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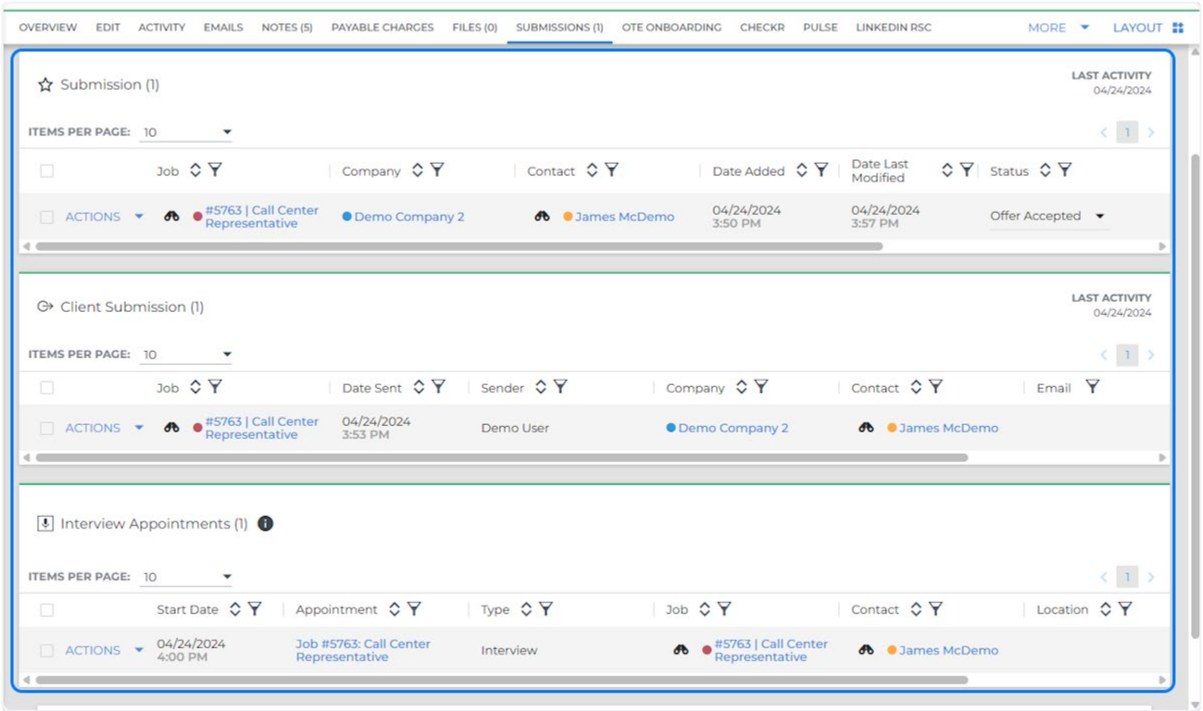
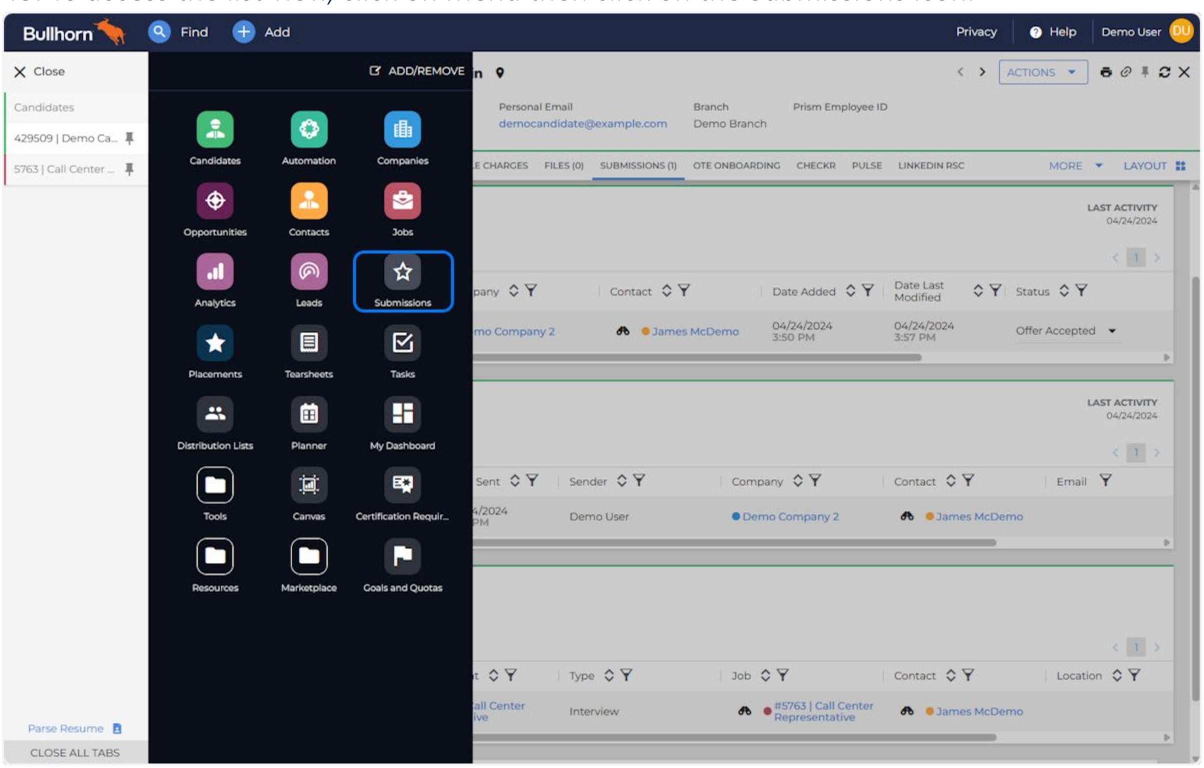
42. View from a records Submissions tab.



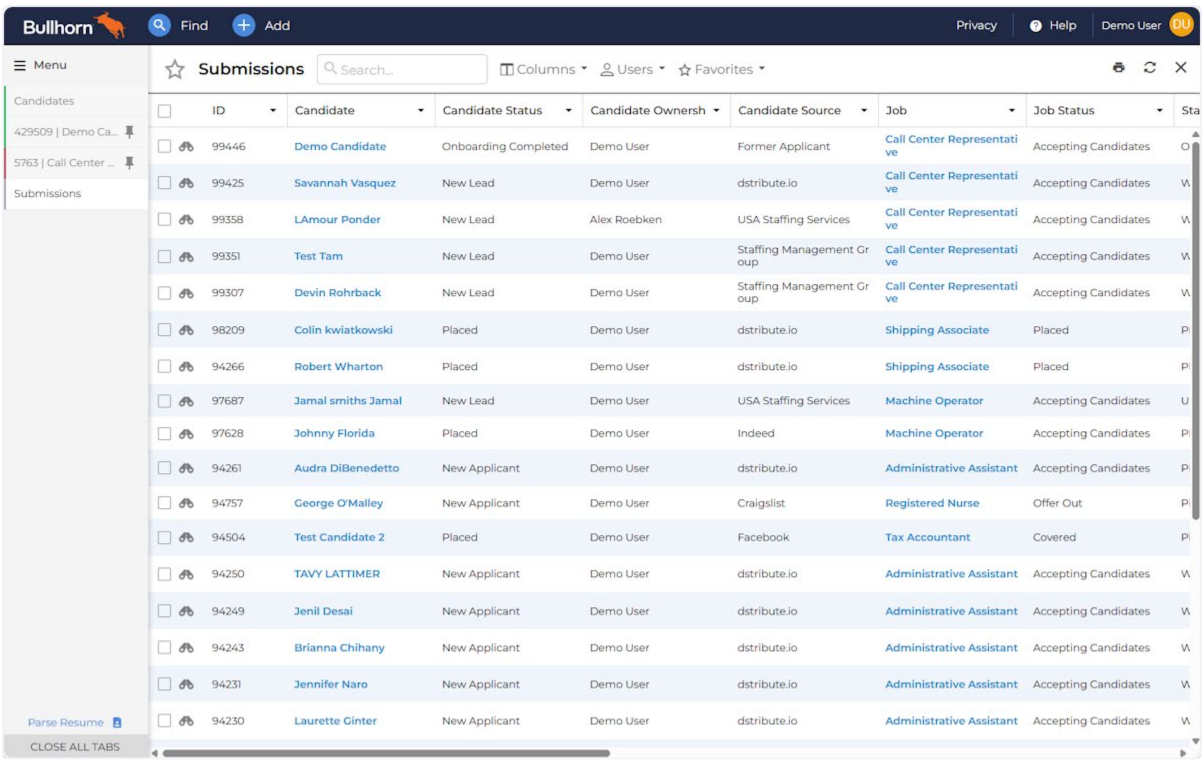
43. To access the list view, click on Menu then click on the Submissions icon.



44. You will now see all of your submissions from a list view and can sort, filter and save specific views to your favorites list. See notes below.

Notes: [See how to save a favorites list here]

- **Status vs Candidate Status**: Is the list view, you will notice there's a column called **Status**, which is referring to the status of the submission. Not to be confused with **Candidate Status**, which refers to the status of the candidate.
- **Web Response** = Web Applies/Applicants. It is suggested to create a favorite list that is specifically for Web Responses and show candidates within the Last 7 Days by using the Date Added column.
    - If you are the job owner, you will receive a daily email from Bullhorn automations for web applies.



Setting Up Placements/Assignments in Bullhorn

There are 2 ways to create a placement in Bullhorn: From the submission or from the job record. There is currently no way in Bullhorns system to create multiple placements at one time. Only 1 placement can be created at time.

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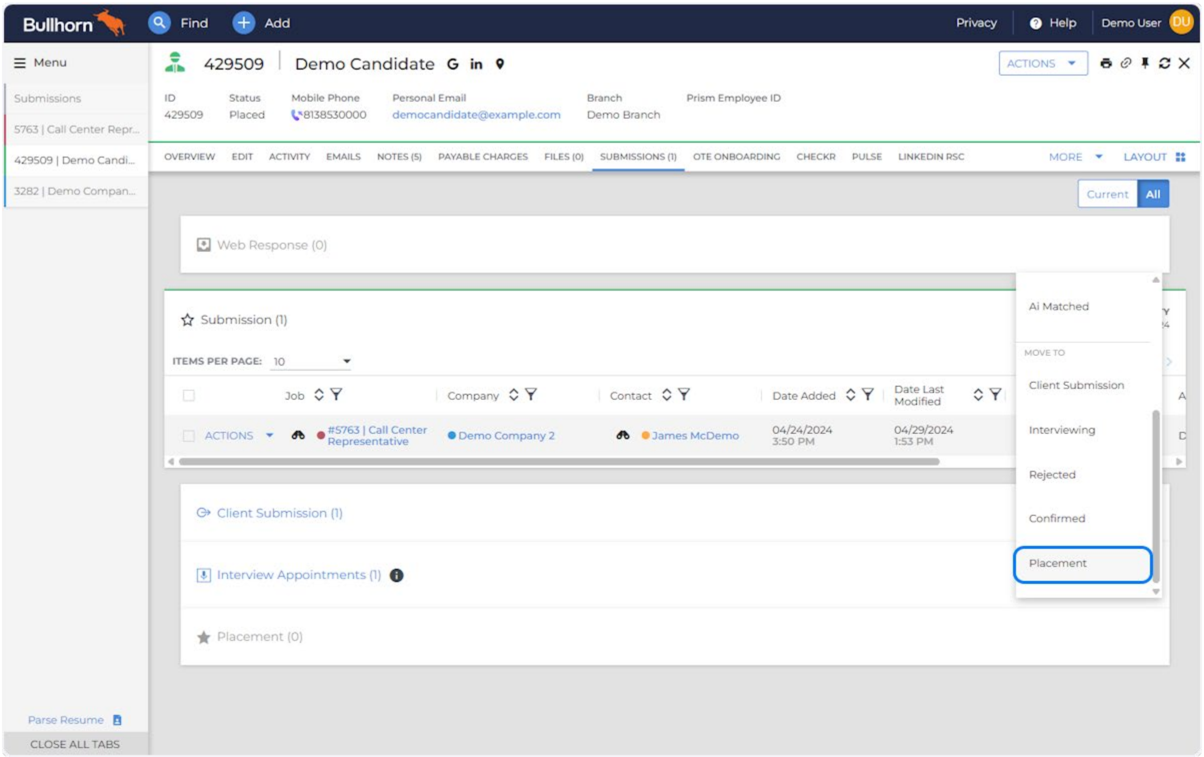
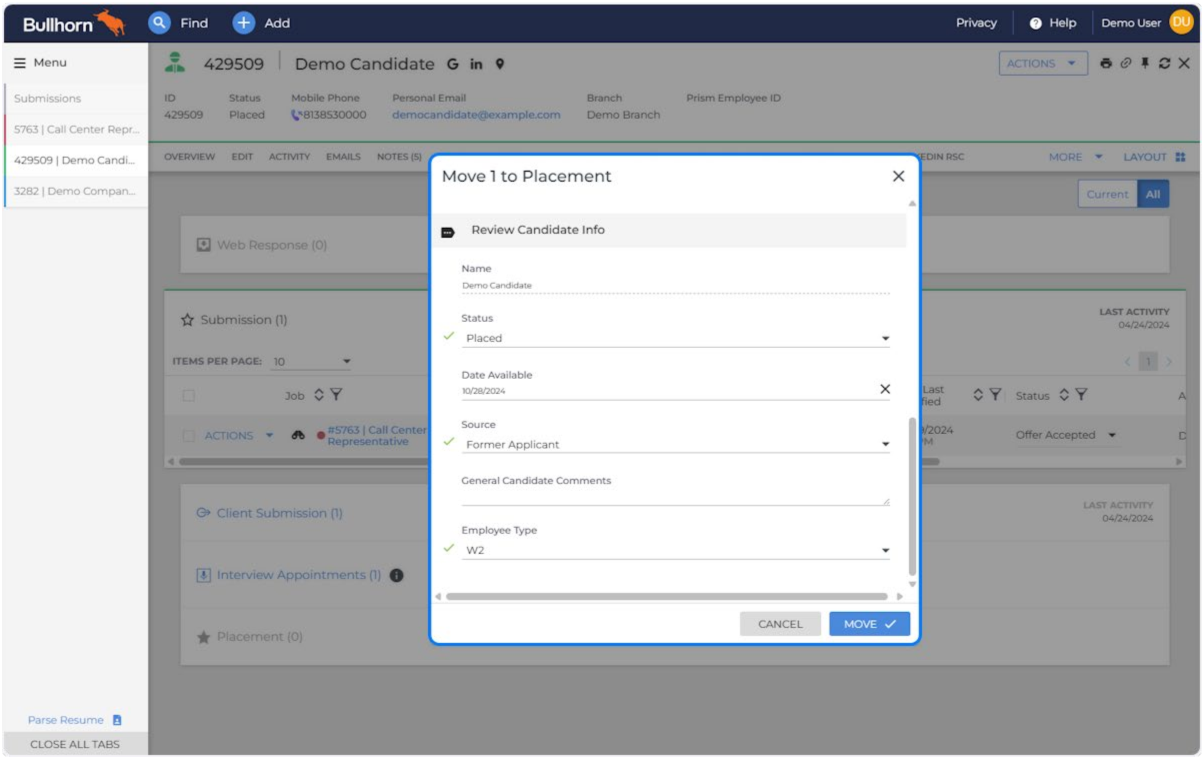
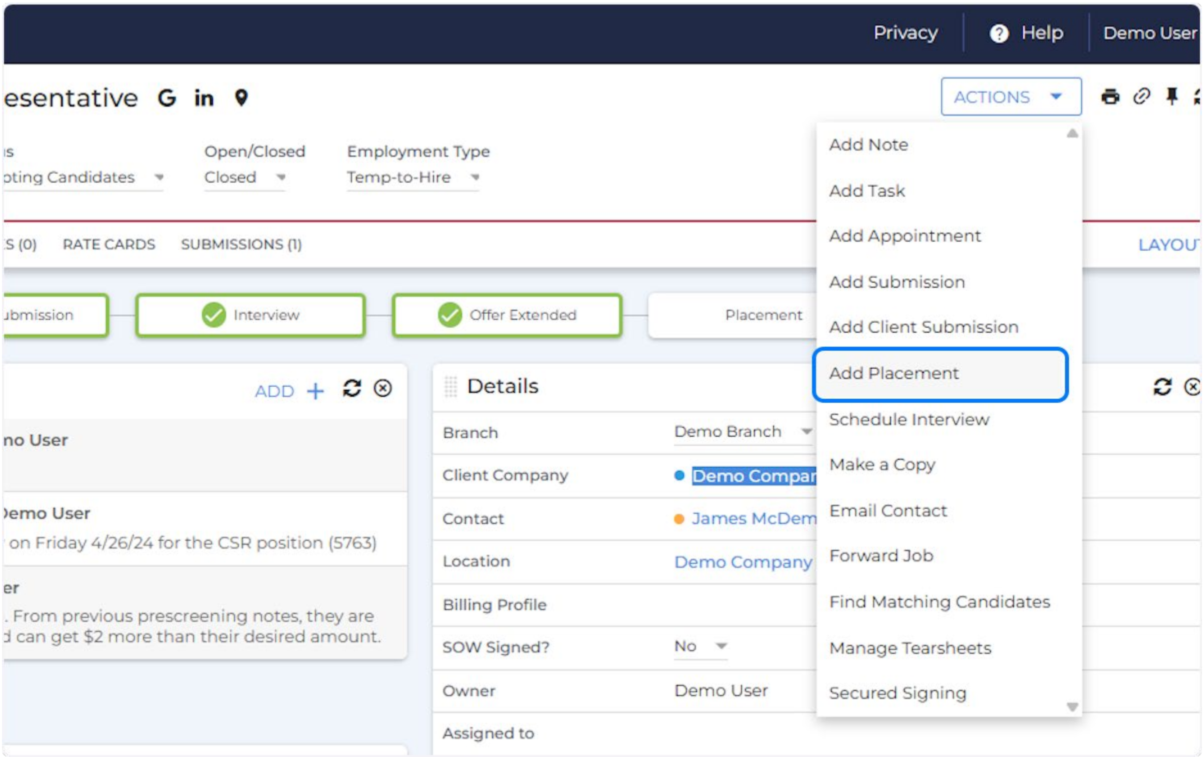
1. If making a placement from a submission, click on the submission status and move the status to Placement. If you are making a placement from the job record, skip to step 3.



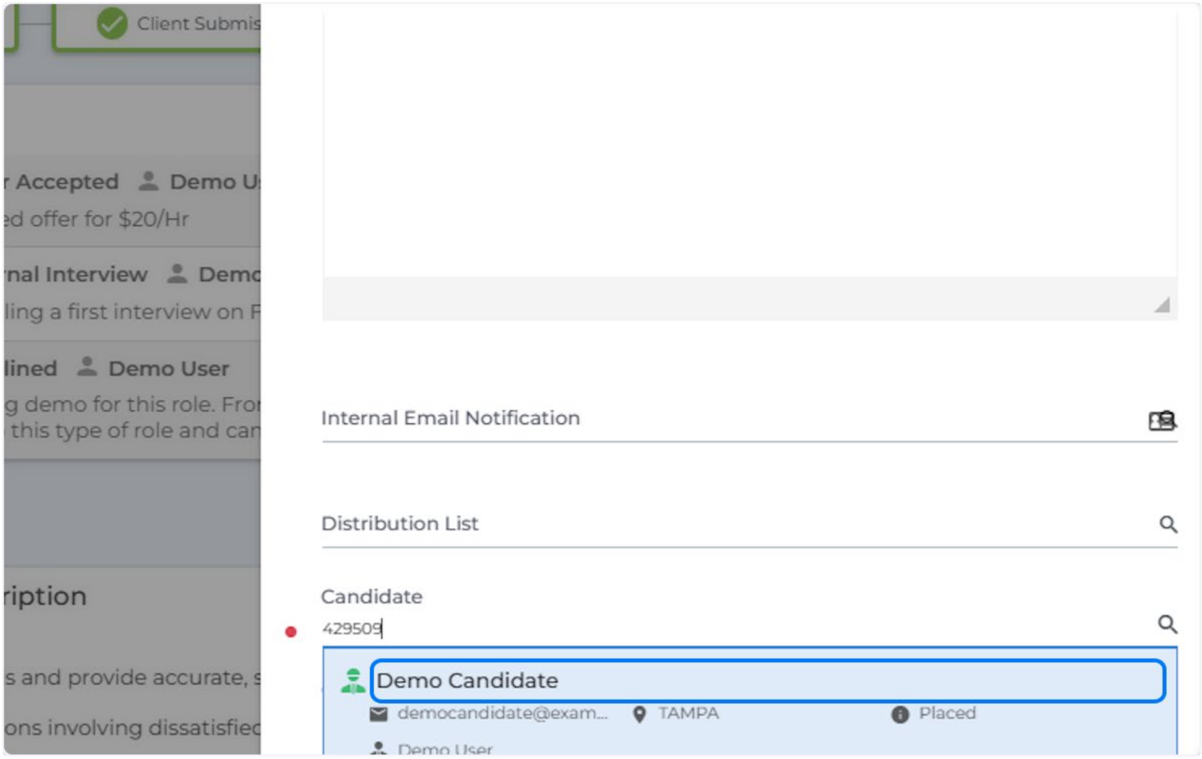
2. You will be prompted to begin setting up the placement. For further instruction with this method, please skip to step 5.



3. To add a placement from a job record, select the ACTIONS button and then select Add Placement.

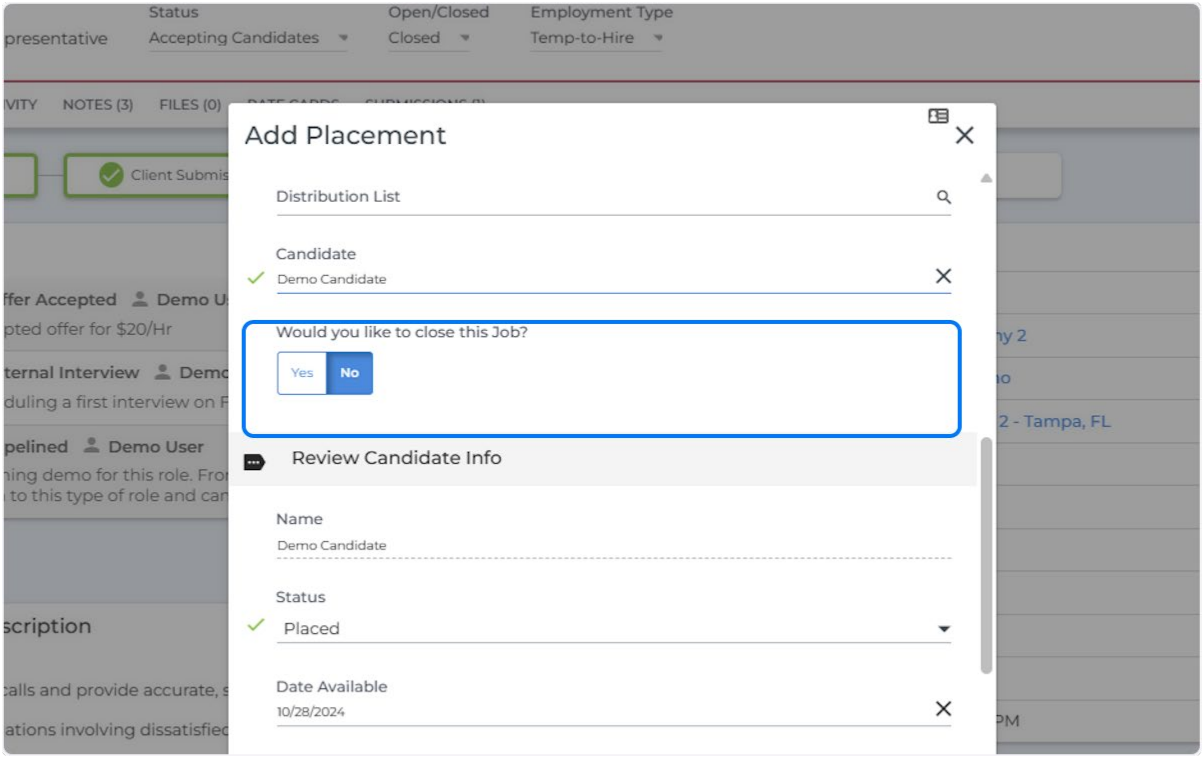


4. Enter the candidates ID or full name.

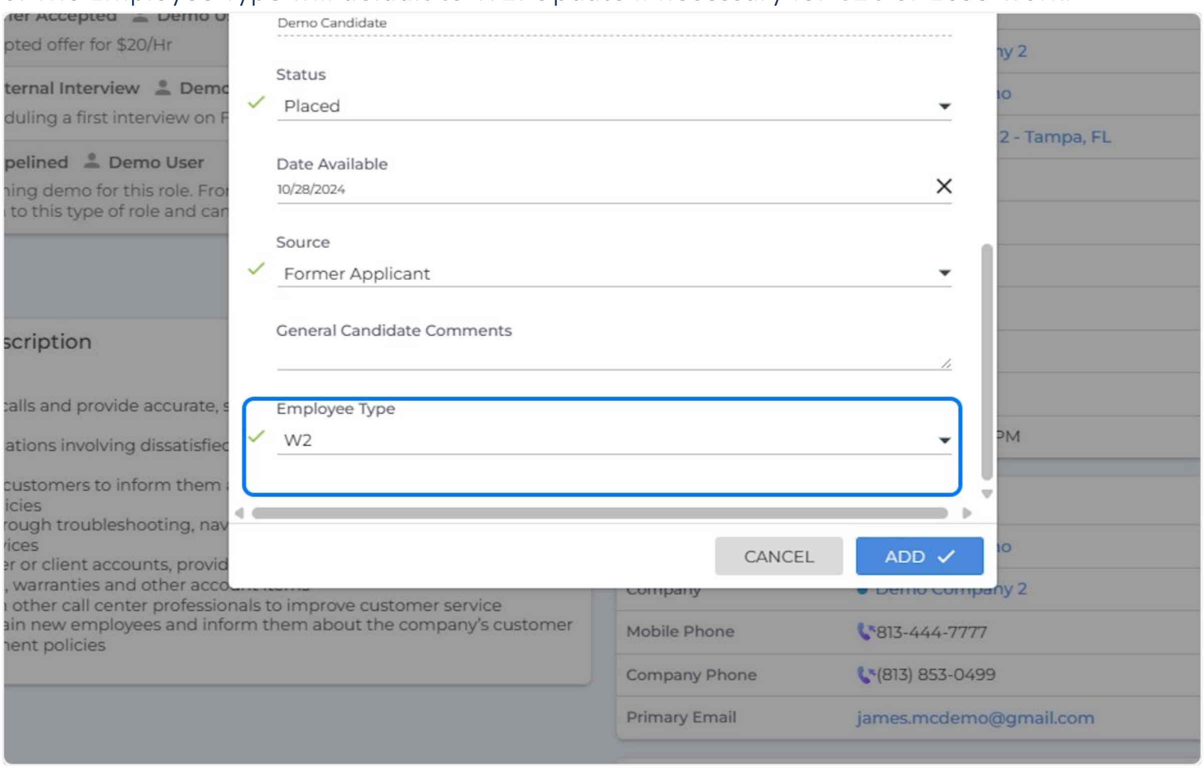


5. Choose whether or not you want to close out the chose order.

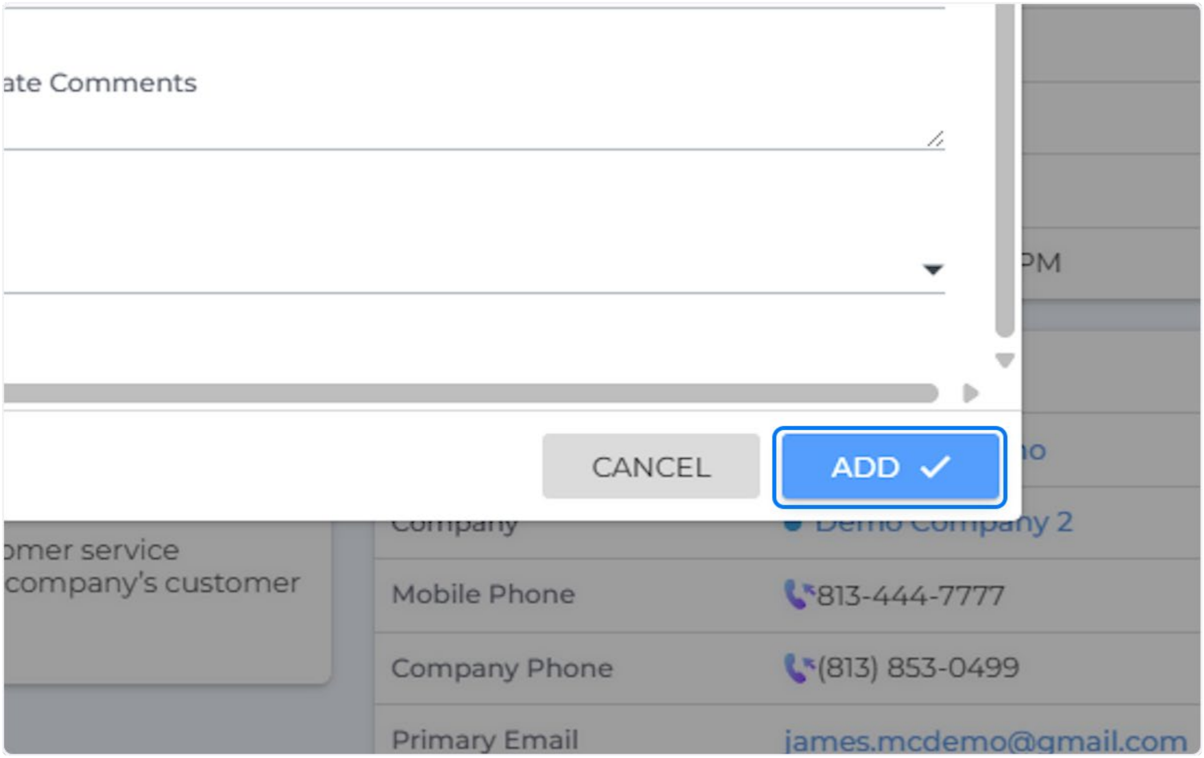
Note: You will want to update the job status accordingly as well. Reminder that for a job to stay posted on the job board, it must stay as an Open Job with the status **Accepting Candidates**.



6. The Employee Type will default to W2. Update if necessary for C2C or 1099 work.

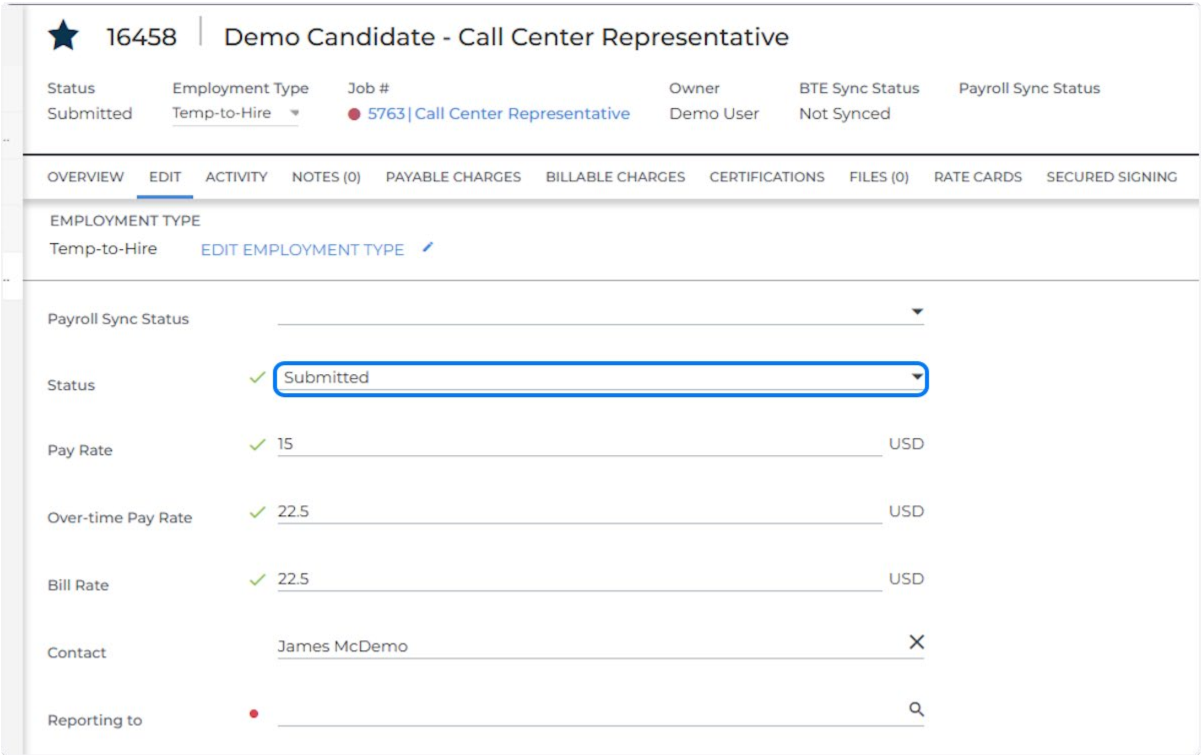


7. Click the ADD button.

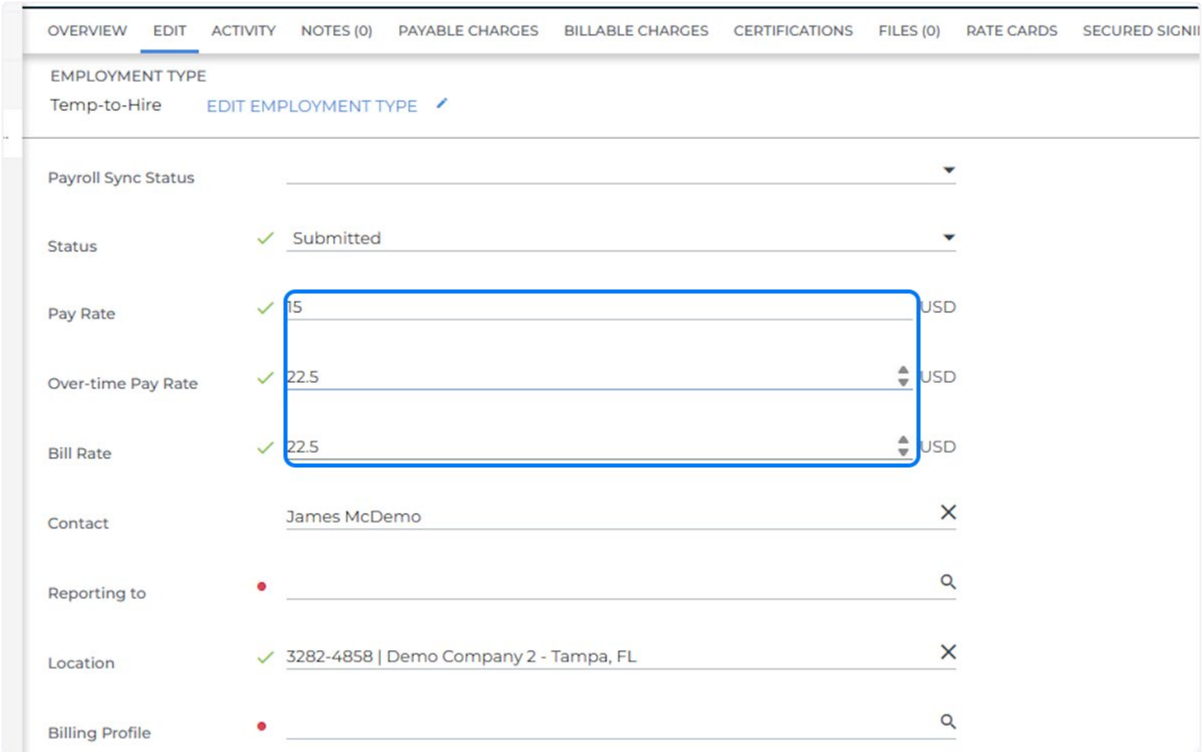


8. The placement status should stay at Submitted. An SMG team member will move it to Approved once reviewed and setup.

Note: A placement with an Approved status = Active Placement. This status is necessary for time entry and payroll to sync properly.

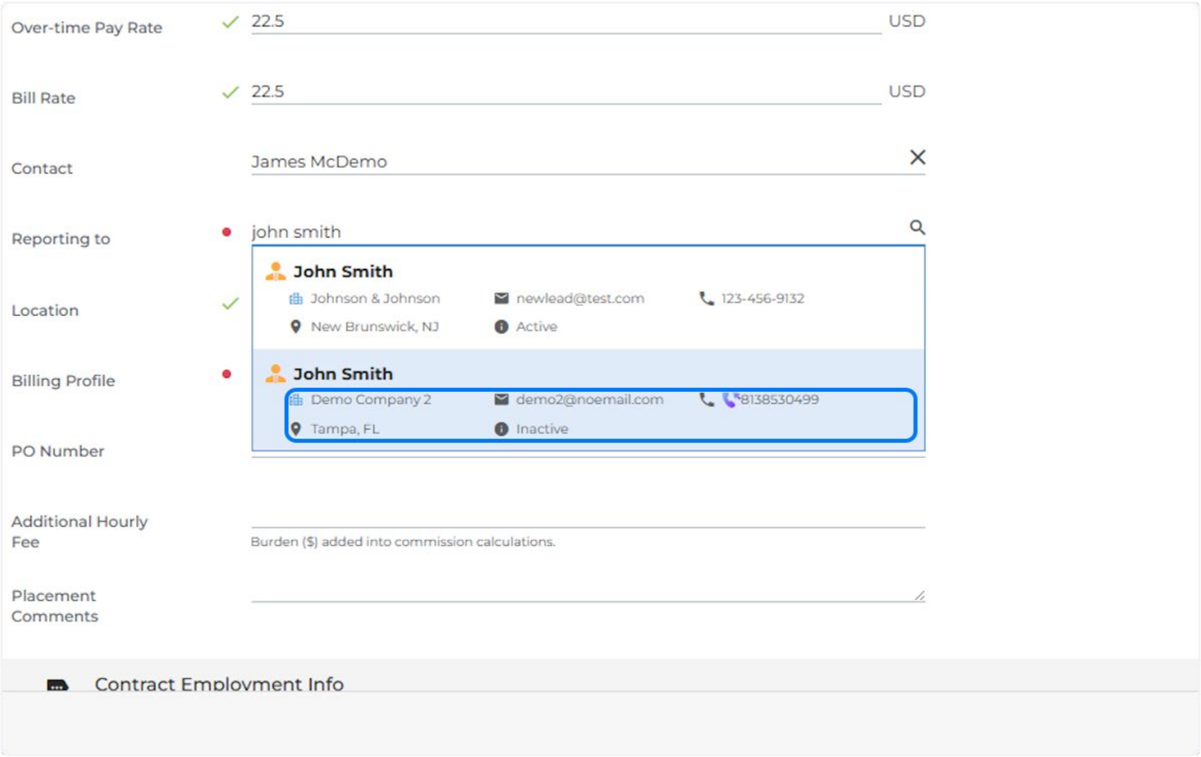


9. The Pay Rate, OT Pay Rate and Bill Rate will default to the rates set on the Job order. Change if they are different as these fields are used for Analytics and the native commission calculator.

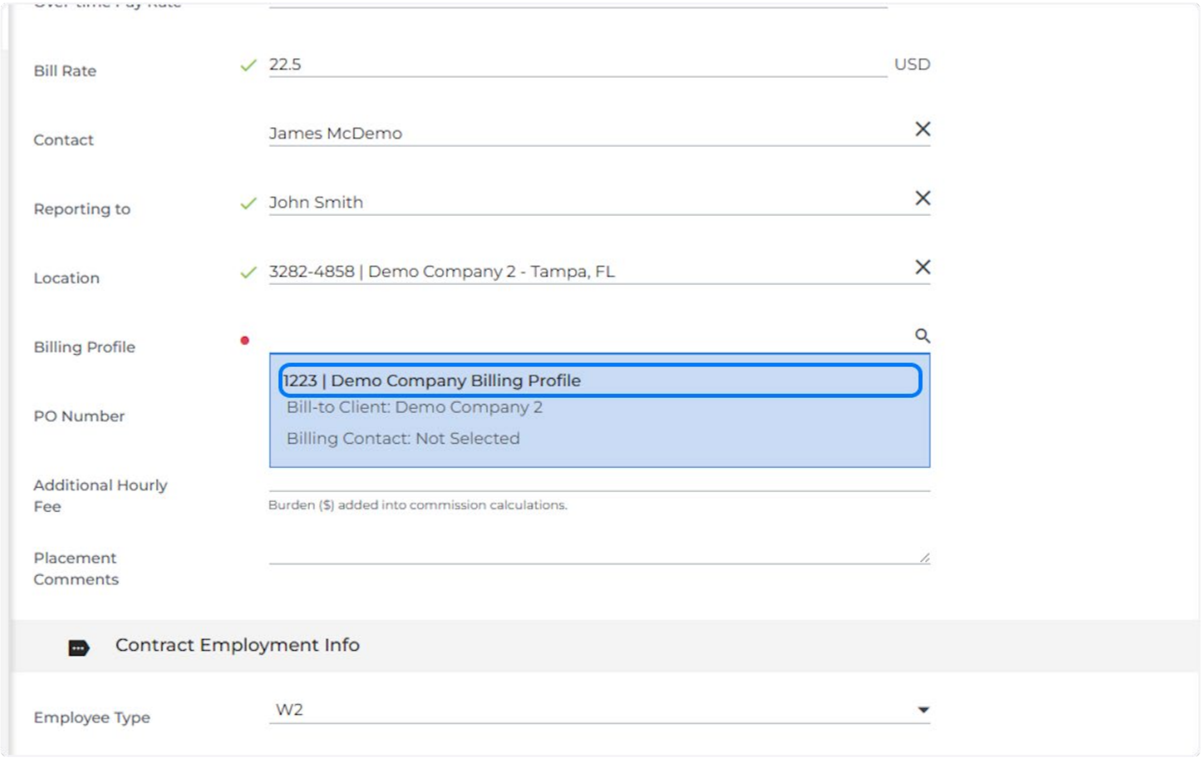


10. Enter the name of the Reporting To contact (Supervisor) and select them from the drop down. This may differ from the Sales contact and/or time approver.

Note: The time approver will be entered later in this process.

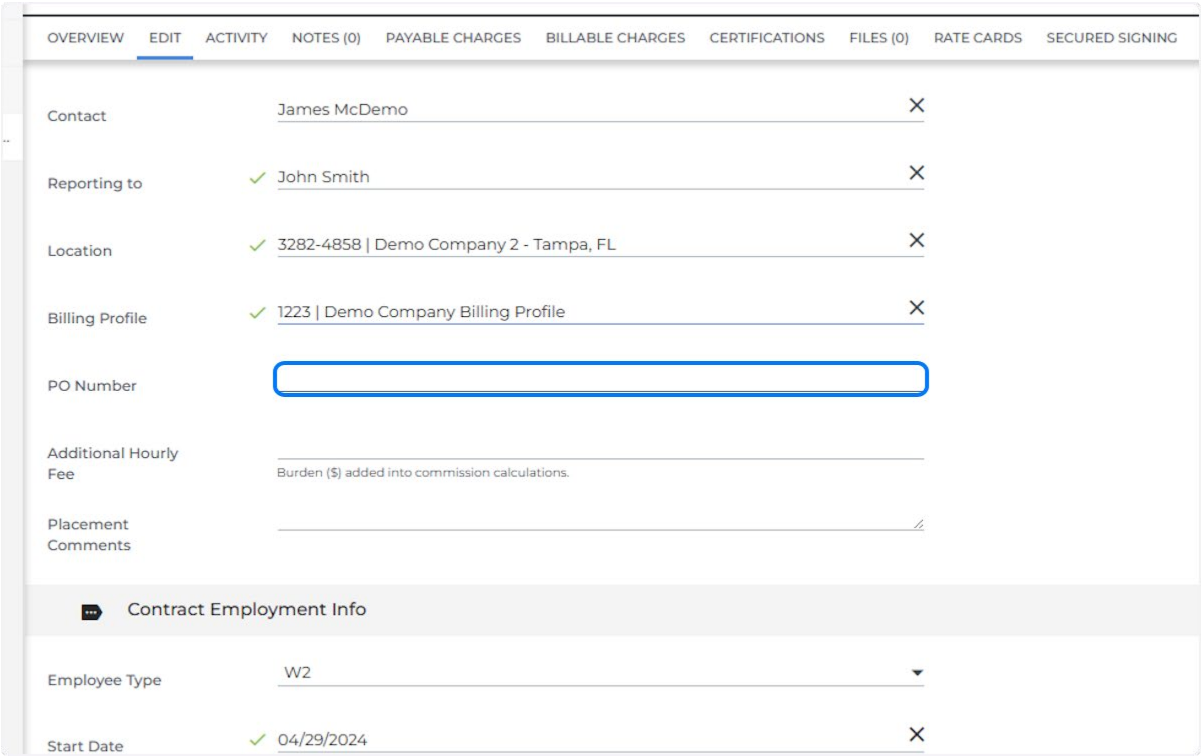


11. Enter the proper Billing Profile if it was not included in the job order.

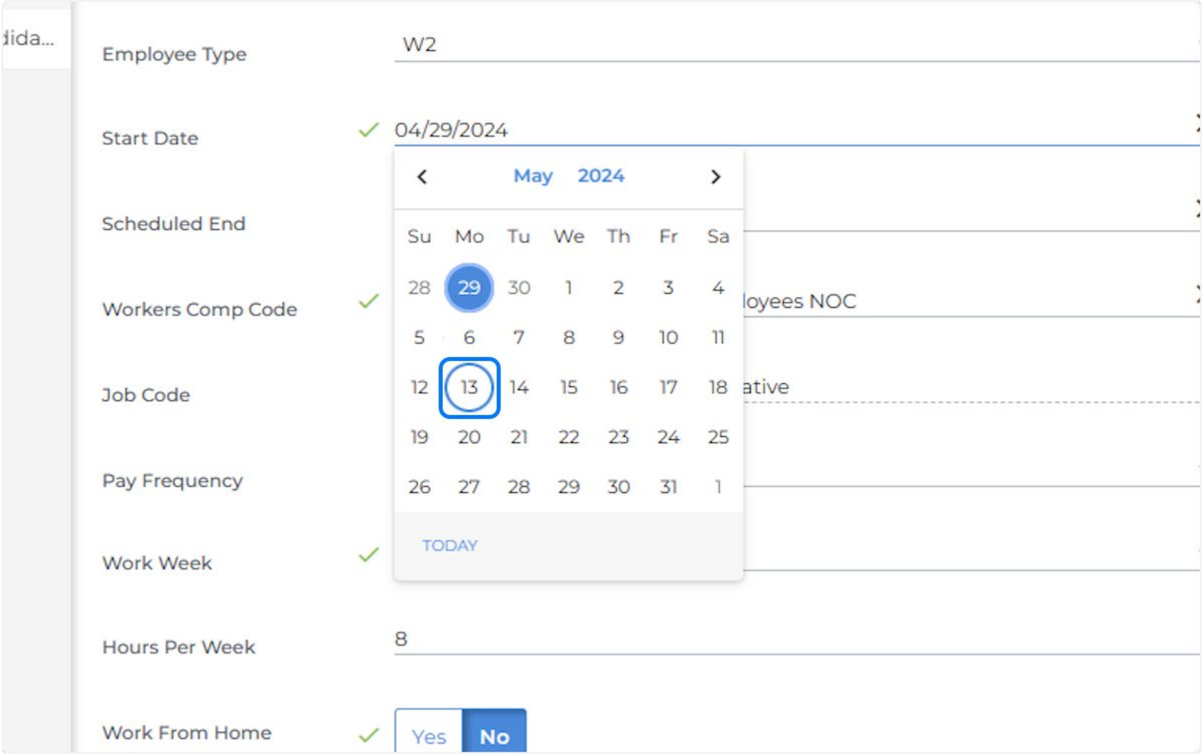


12. Enter the PO Number, if applicable.

Note: The PO # will transfer over from a job order. It must match every character exactly if it is manually entered.

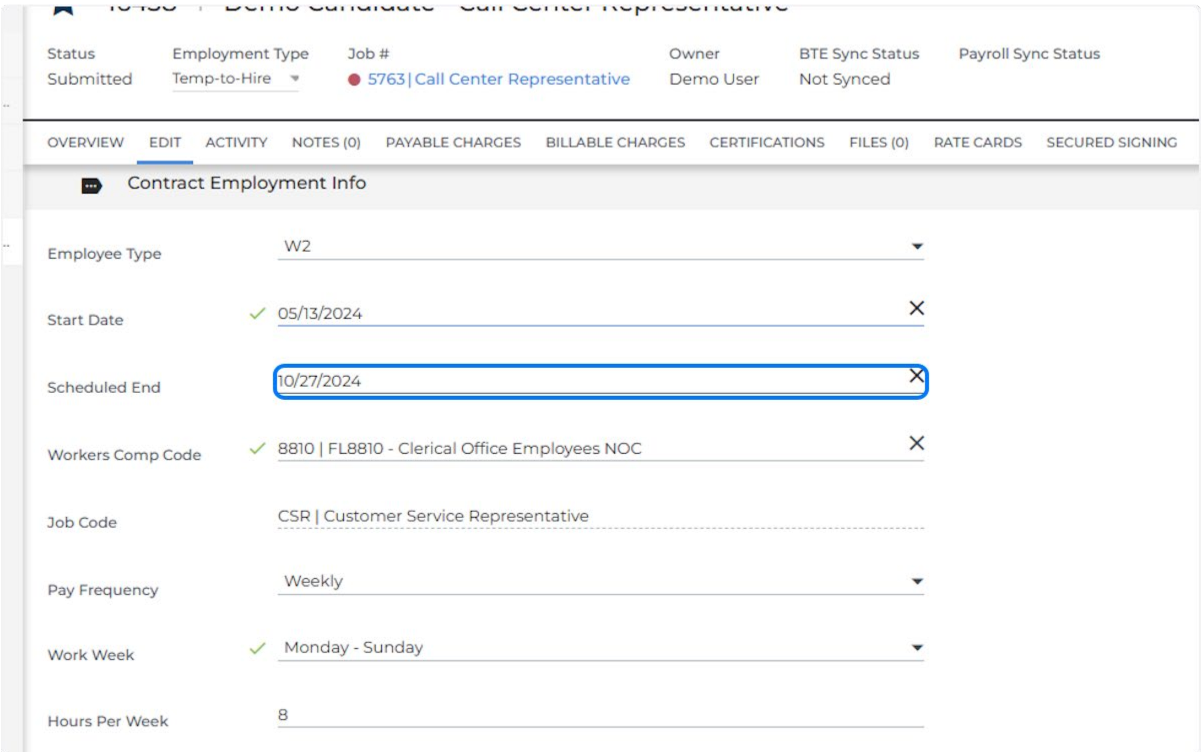


13. If necessary, update the start date using the date picker.



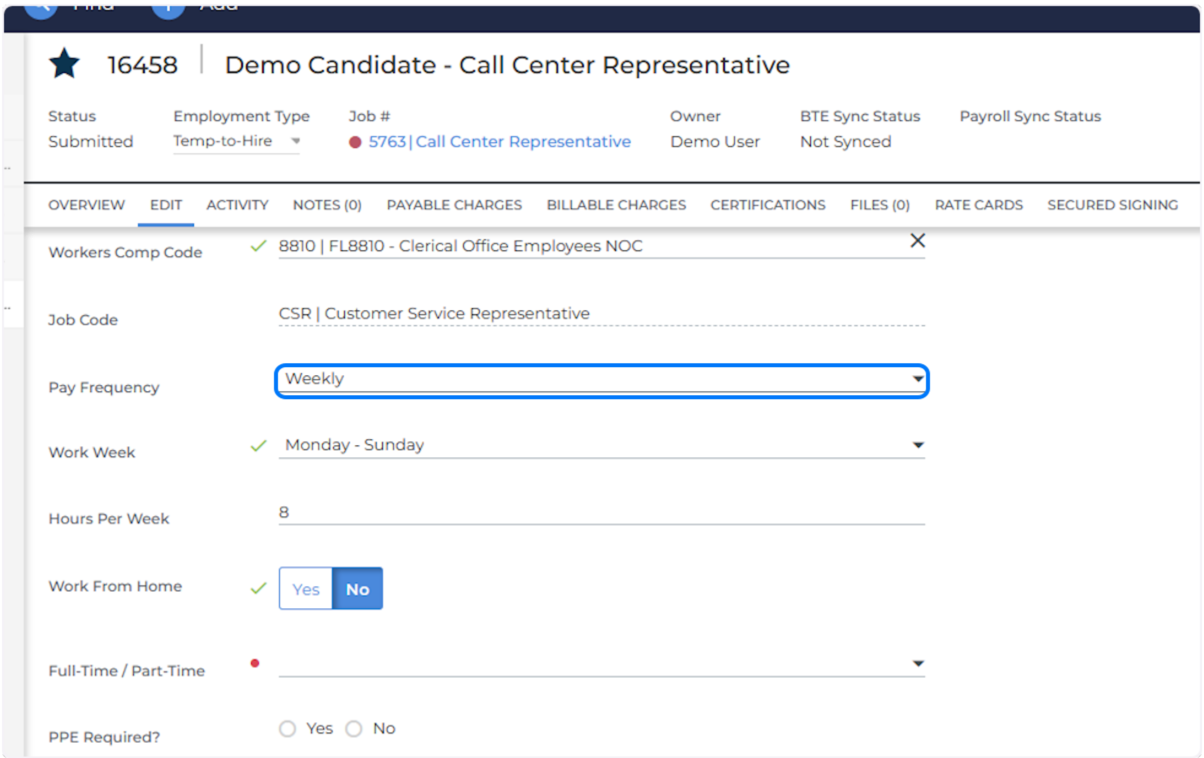
14. If necessary, update the end date using the date picker.

Note: If you do not put an end date, Bullhorn Analytics will not pick up the proper projections.

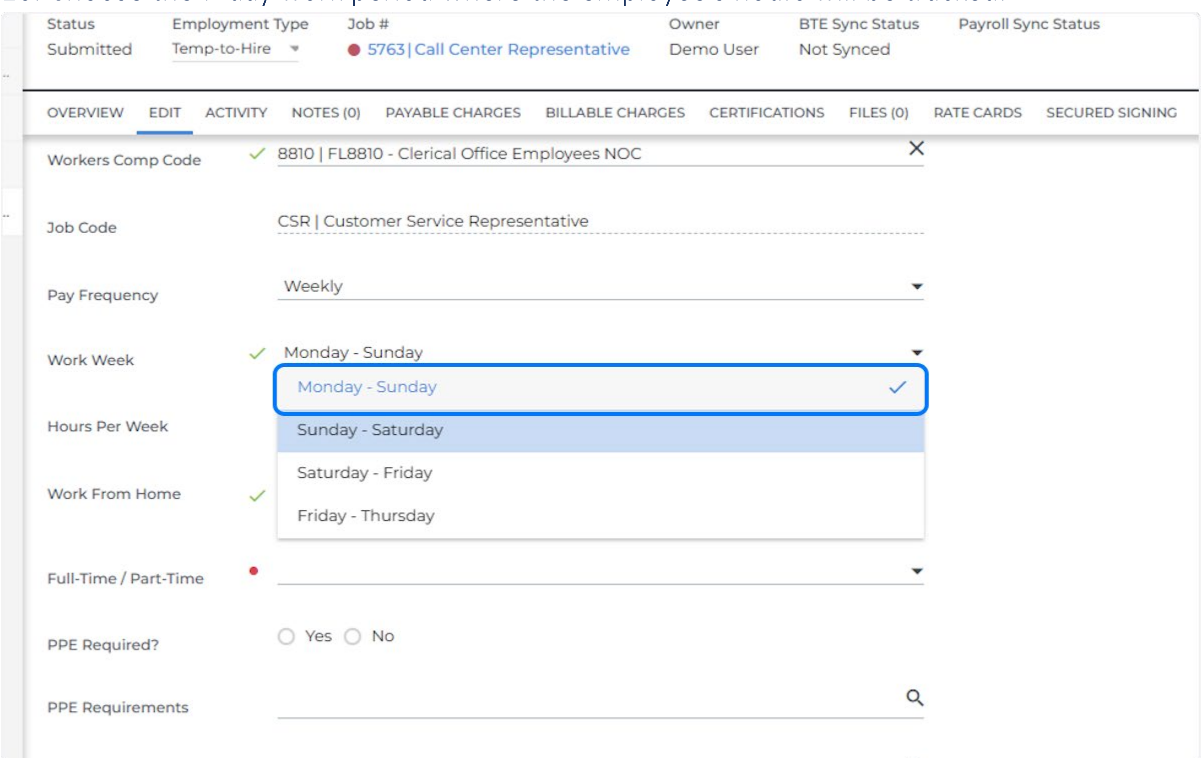


15. Defaulted to Weekly, however if you need to pay on a Bi-Weekly basis, you can change on this field.

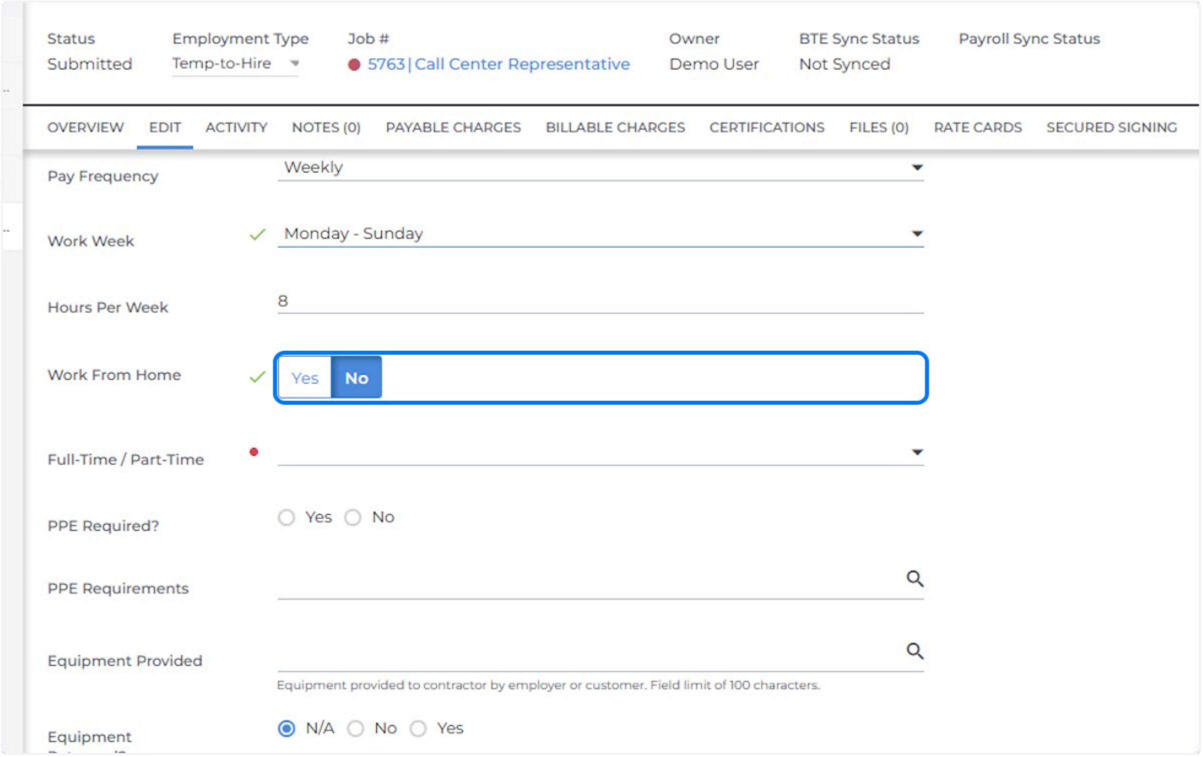
Important Note: If setting up Bi-Weekly, the Payroll department needs to be made aware of to adjust certain required settings.



16. Choose the 7-day work period where the employee's hours will be tracked.

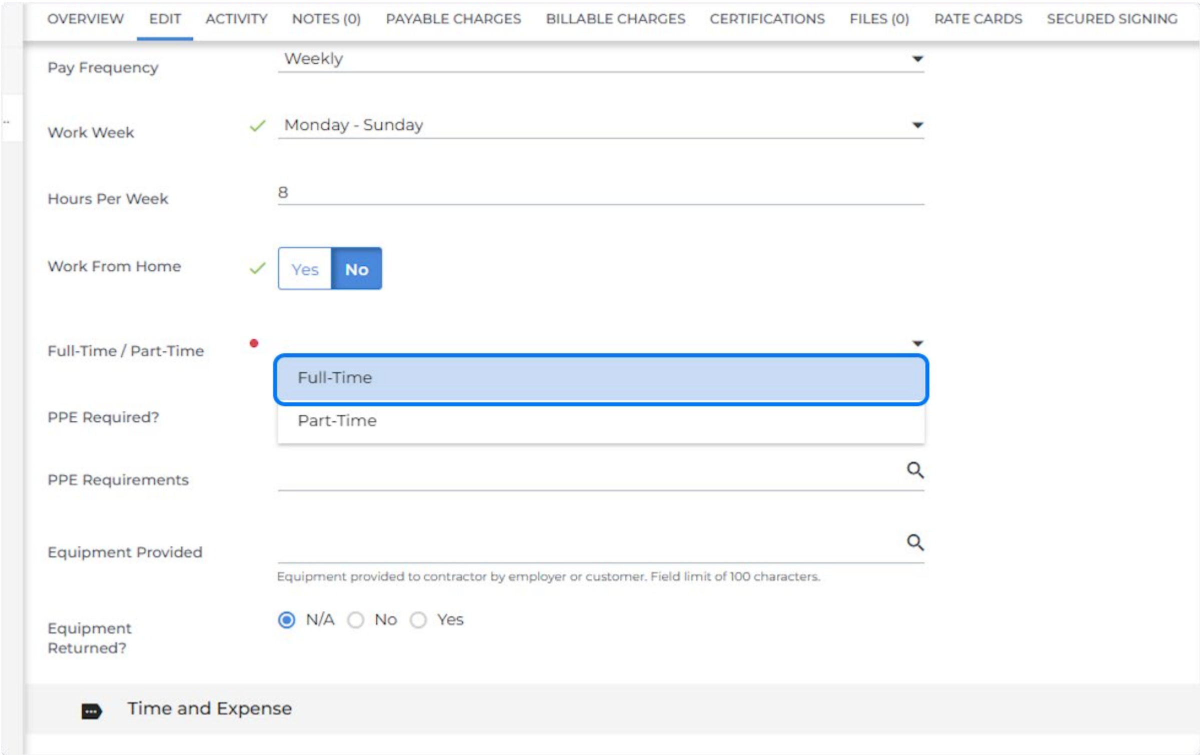


17. Select whether or not this is a remote/work from home role.

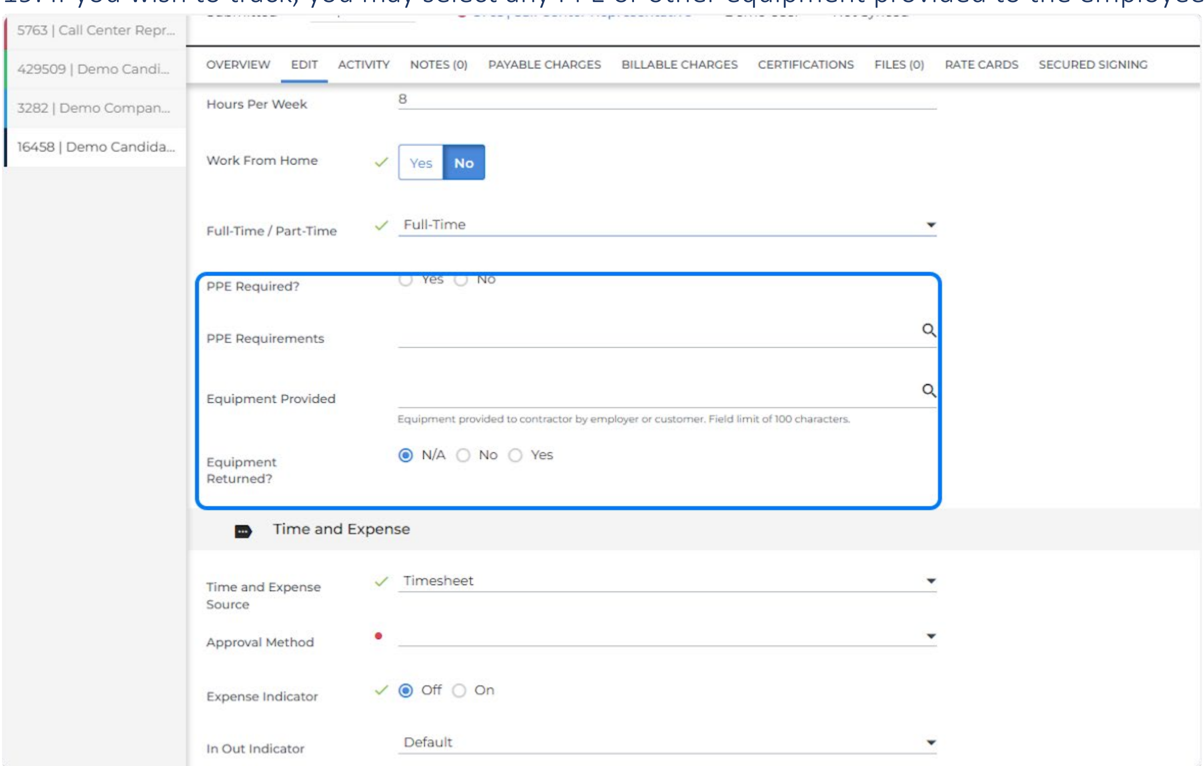


18. Select if this is a Full-Time or Part-Time role.

Note: This field will affect benefits enrollment entitlements.



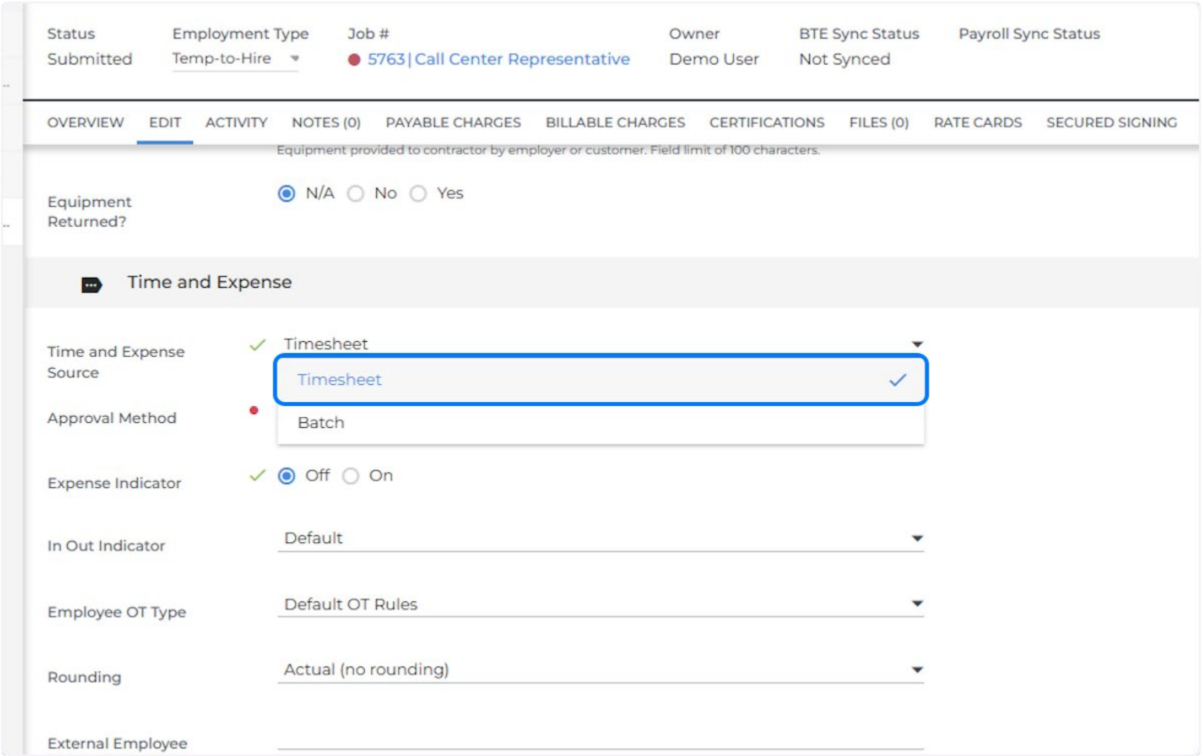
19. If you wish to track, you may select any PPE or other equipment provided to the employee.



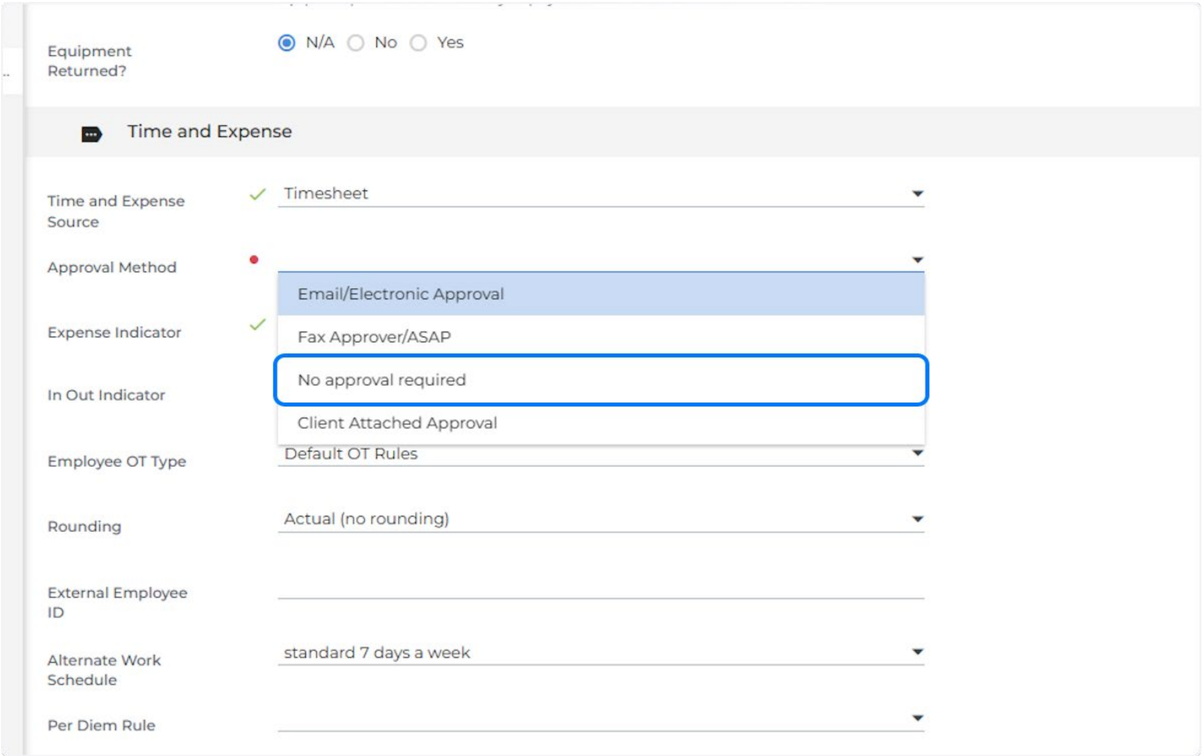
20. Select the time capture method: Timesheet or Batch

Note:

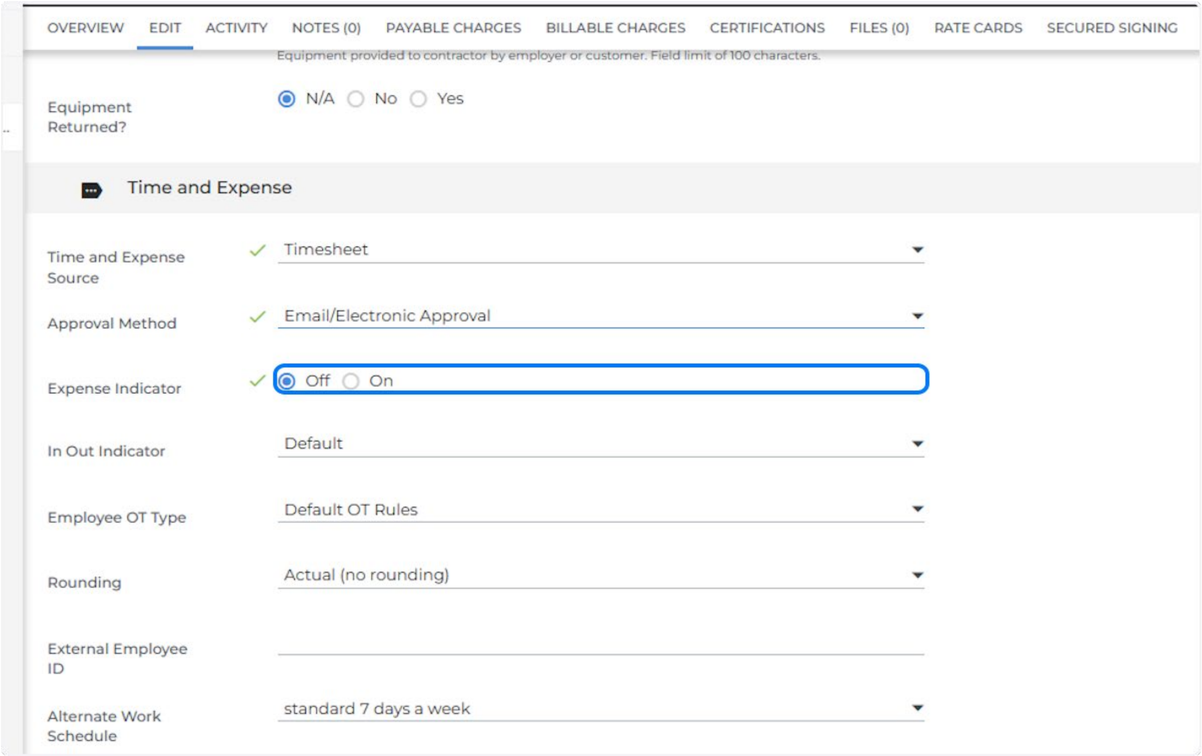
- Timesheet = Electronic time capture via SMG's portal
- Batch = Time provided to our team via another system, spreadsheet, paper timecards etc.



21. If the Time & Expense Source is Timesheet, then the Approval Method should be Email/Electronic Approval. If The source is Batch then No approval required.



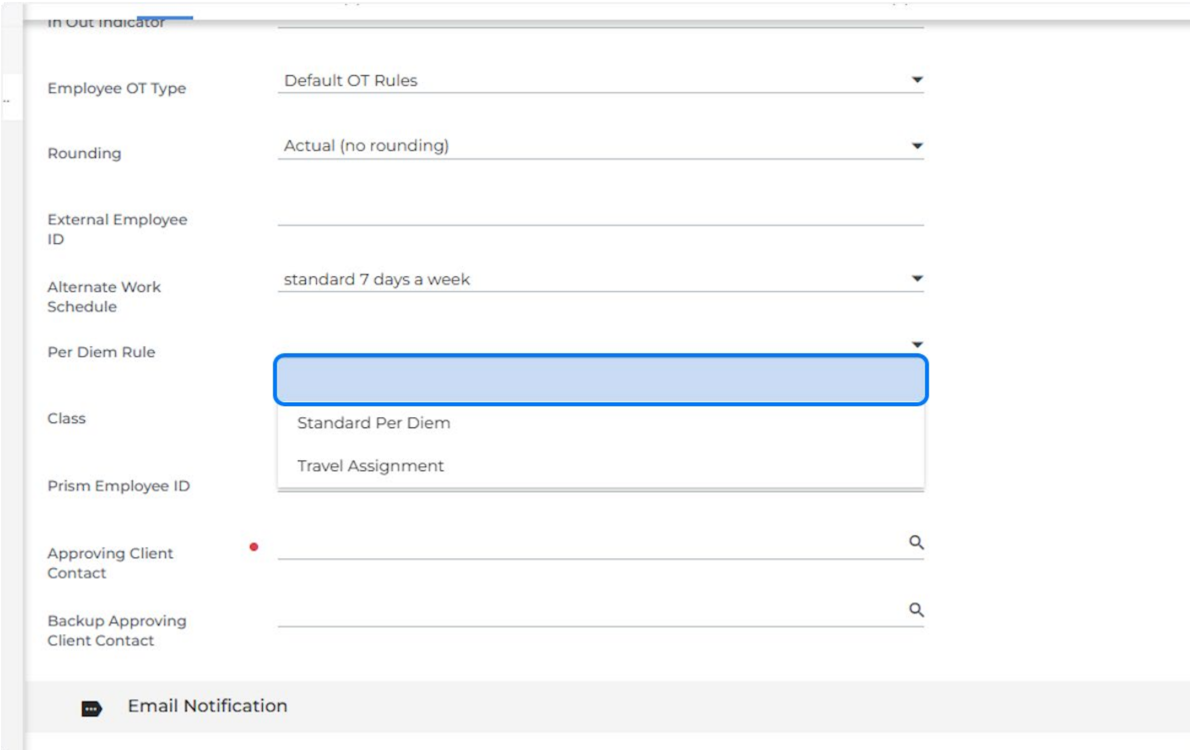
22. Toggling Off or On the Expense Indicator will allow an employee to upload their expenses via the Time & Expense Portal for the client to approval.



23. Per Diem Rules will allow for certain expense related earn codes to automatically be applied for each day worked.

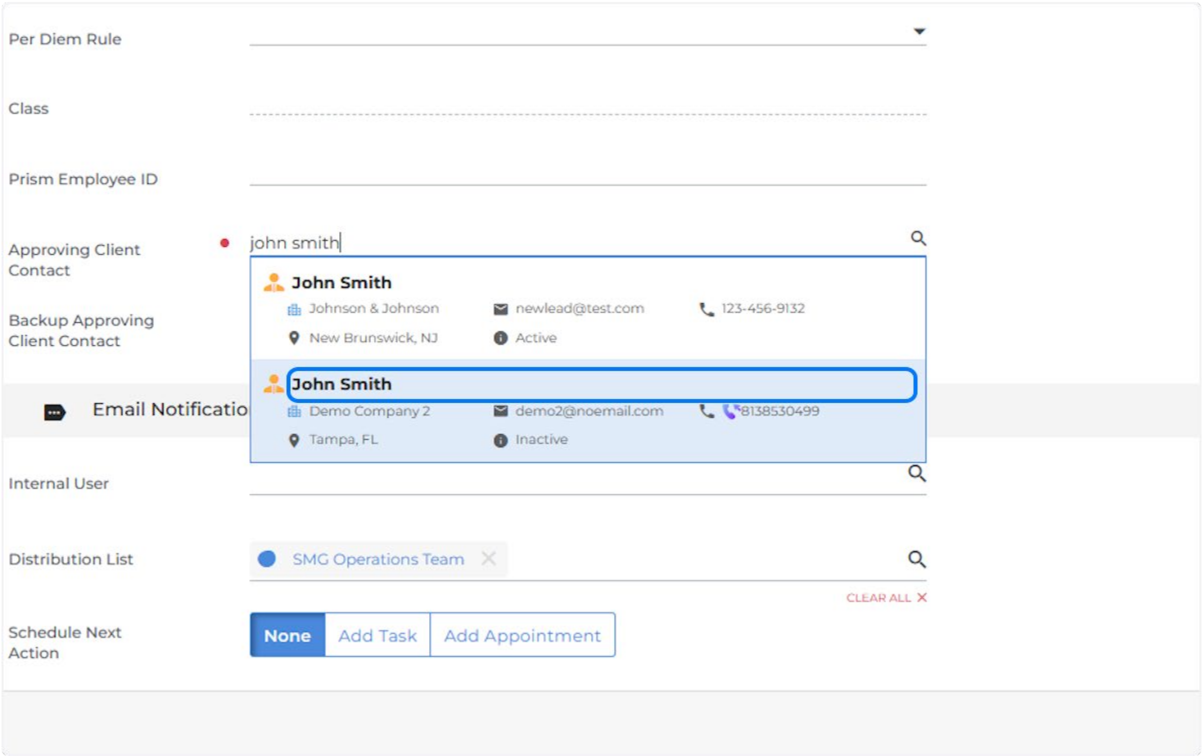
Note:

- **Standard Per Diem**: Will calculate 1 Per Diem unit per 4+ hours worked per day and 0.5 for 0.1 - 3.9 hours worked per day.
- **Travel Assignment**: Will calculate 1 unit of Housing Allowance per day on assignment and 1 unit of M&IE per day worked on assignment.

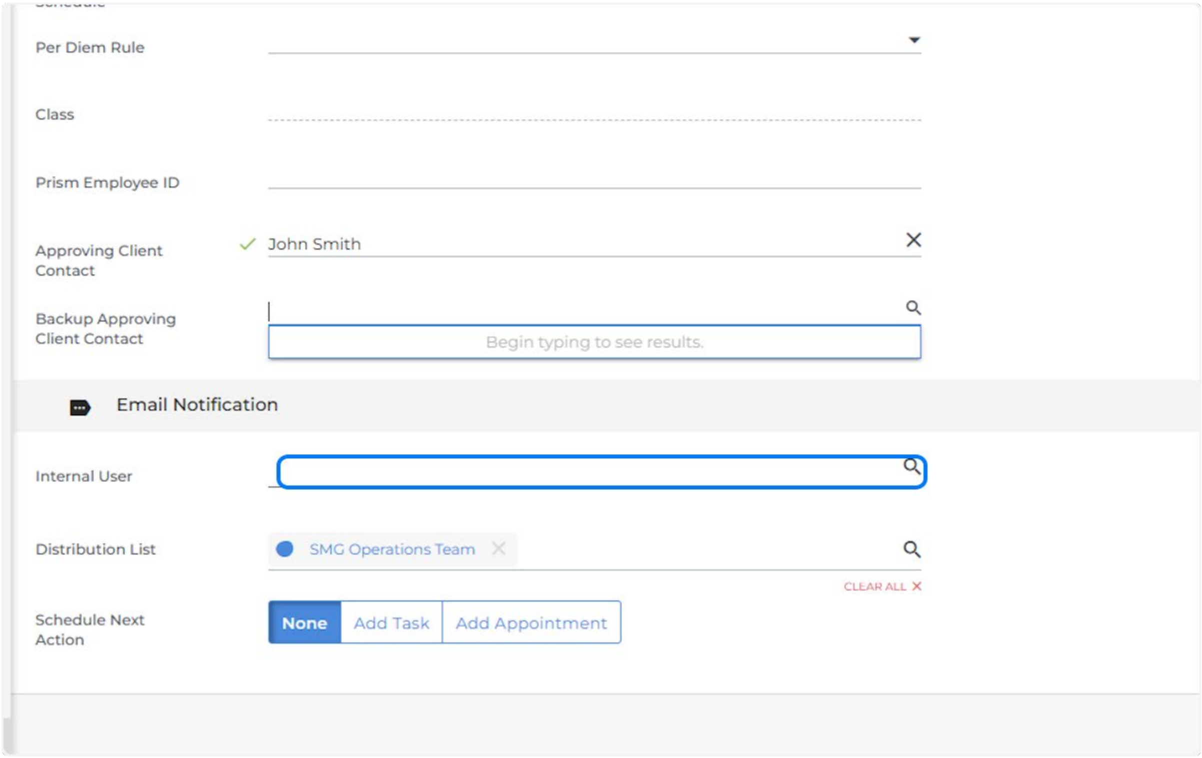


24. Search and enter the Time approver for the assignment. A backup time approver can be enter in the Backup Approving Clietn Contact field.

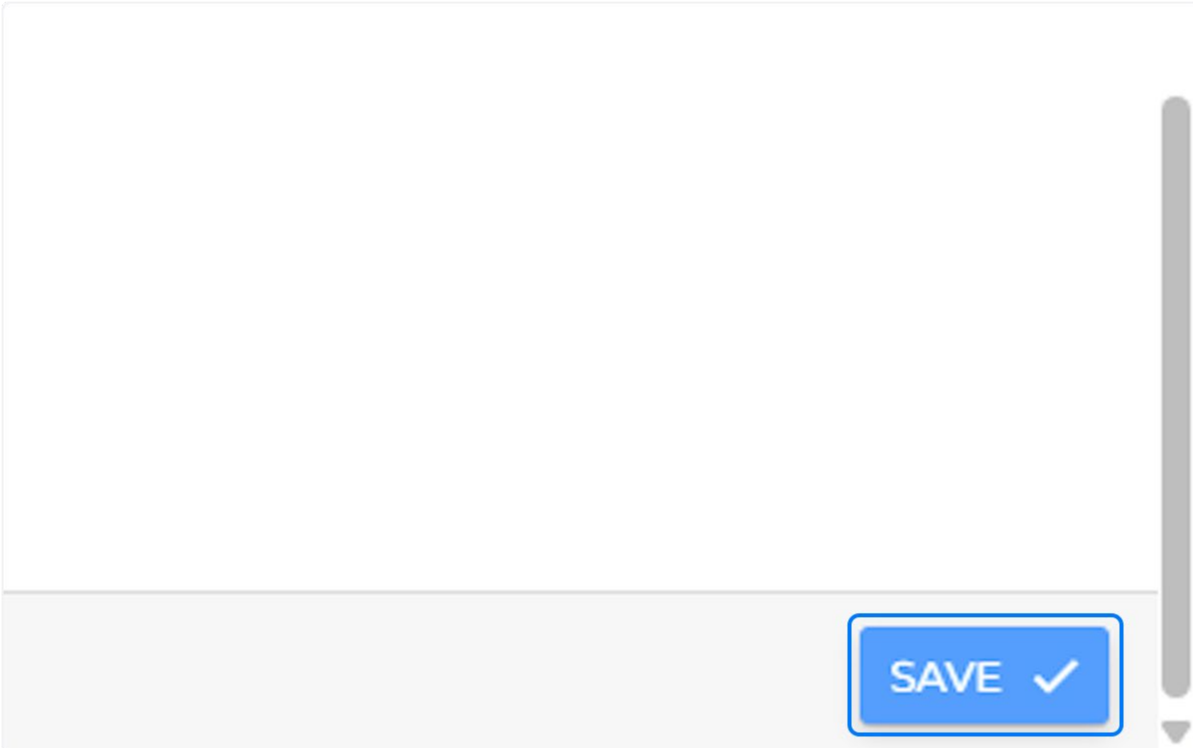
Note: If you need more than one backup, a Staffing Manger will need to assist with setting them up in the Time Entry portal.



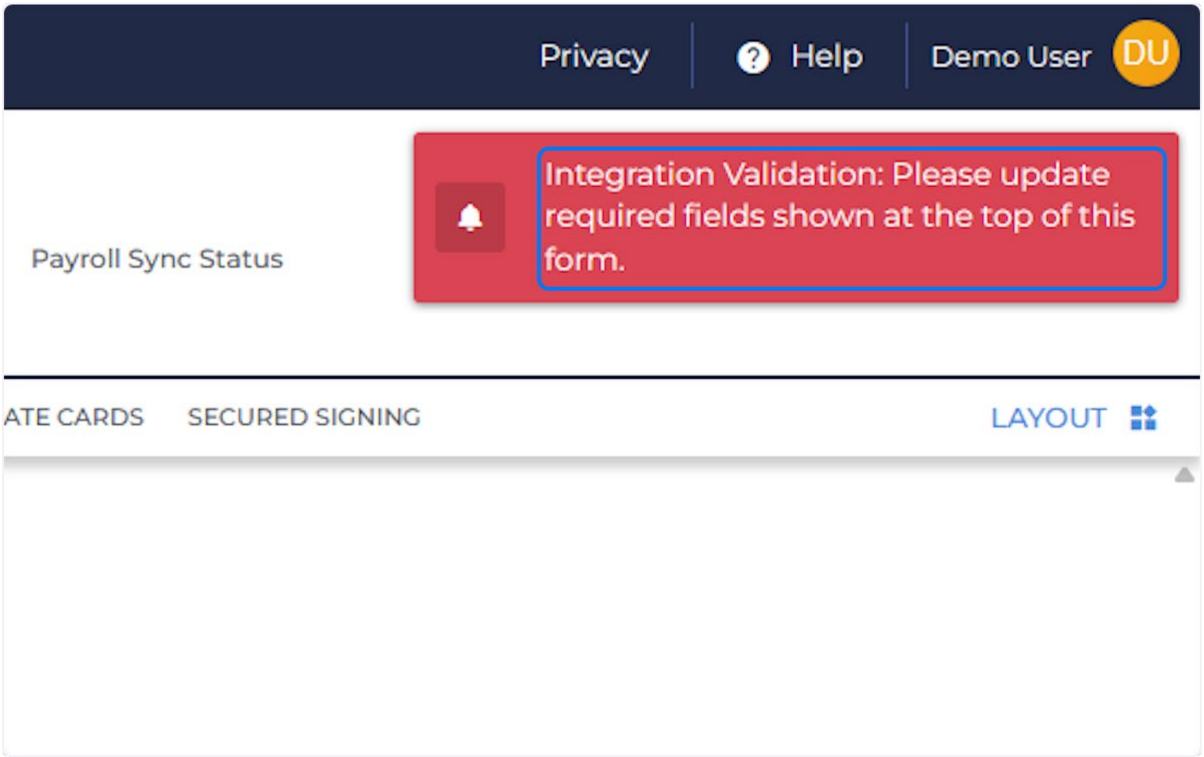
25. Enter your direct Staffing Manager to be notified as they need to review and approve the placement for it to become active.



26. Click on SAVE.

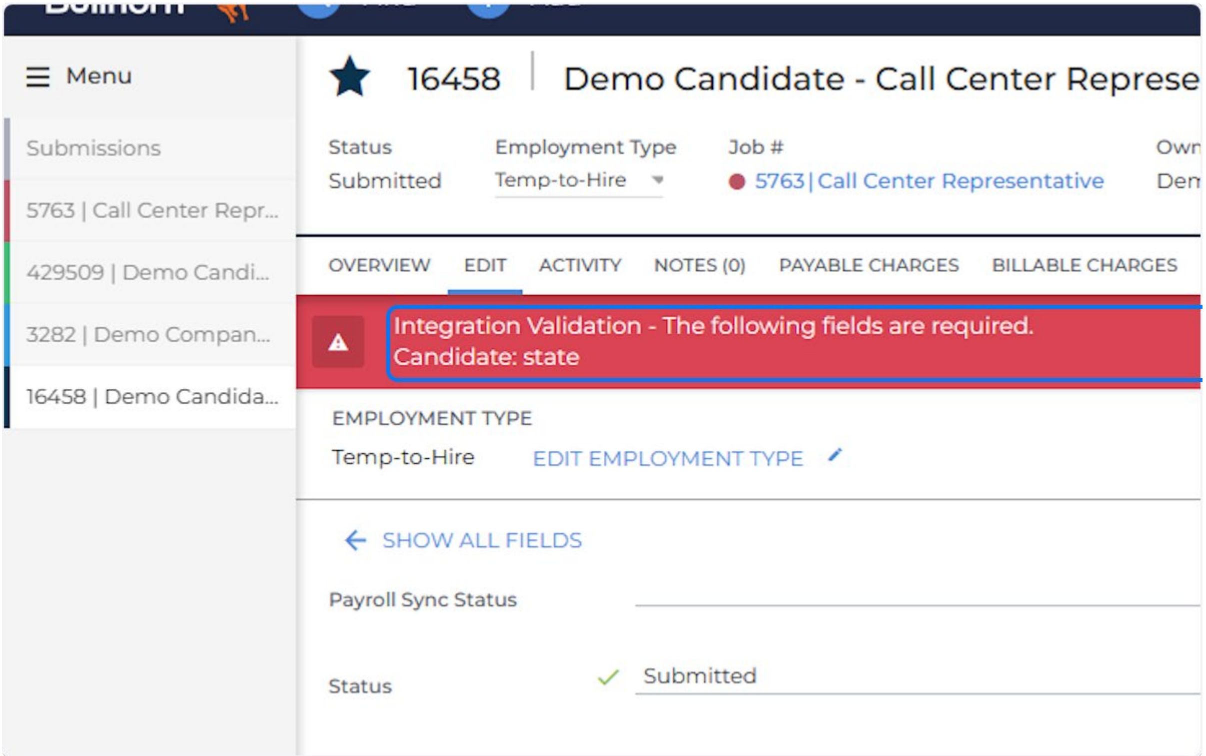


27. If there is an issue with fields that are required for the integration Validation, a red notification will appear.

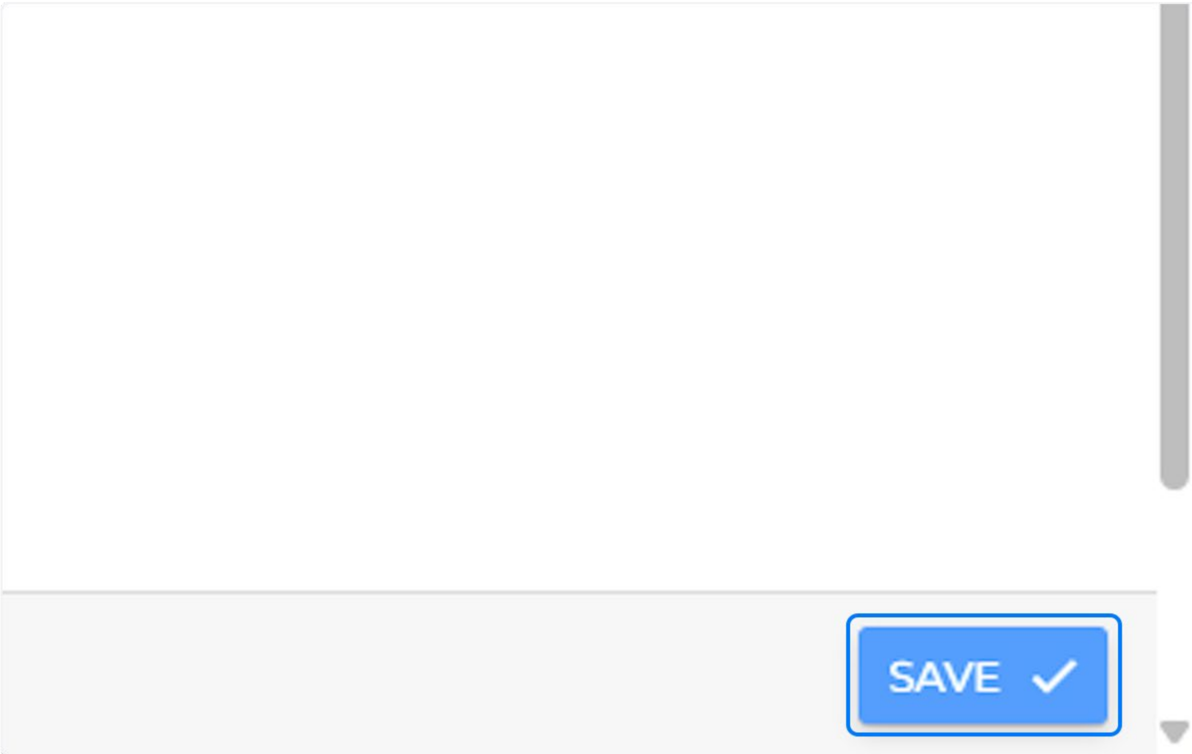


28. Scroll up further on the placement for details on the missing or incorrect field(s).

Note: You can keep the placement editor open while you adjust the correction on the candidate record instead of starting over from scratch.



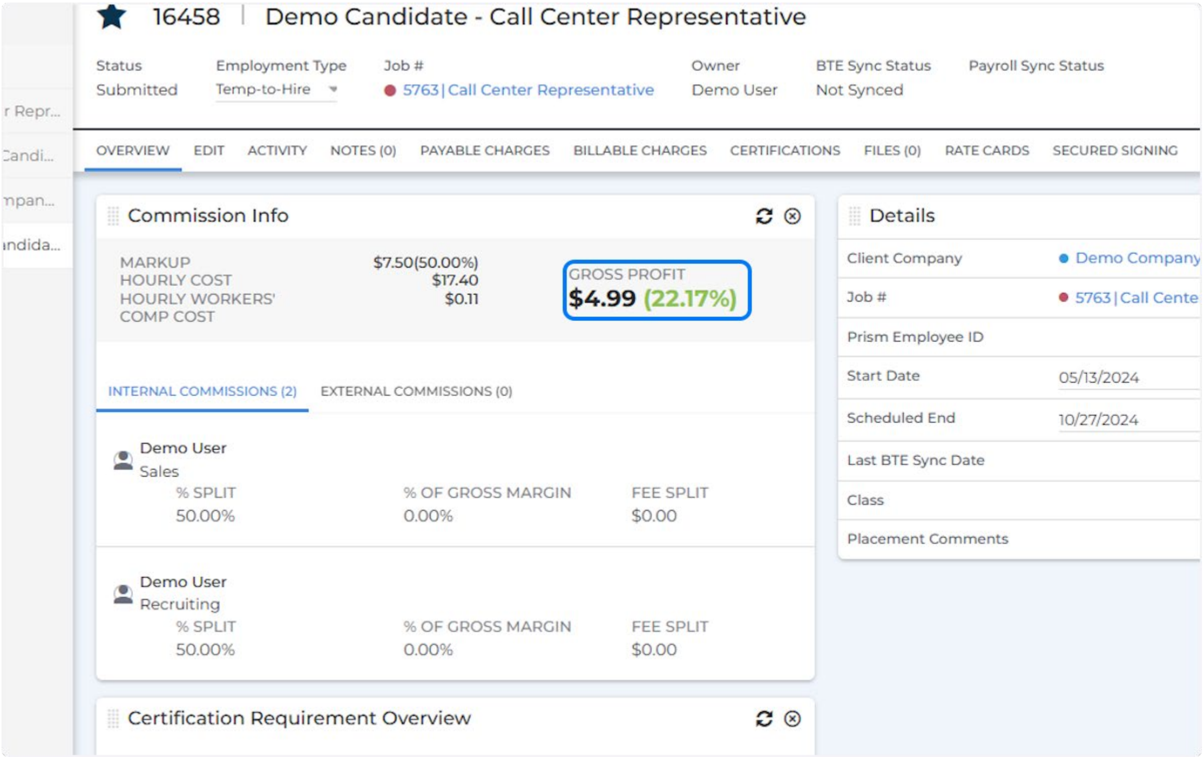
29. Click on SAVE



30. Once created. you can see an estimated Gross Profit for the placement.

Note: This GP included a 16% payroll burden, which may vary depending on the state.

Link to how commission are calculated: [ATS: How are placement commissions calculated? (bullhorn.com)]



Next step, you will need to add or adjust the placement rate card, if it was not setup on the job order or differs from the job order rate card.

Placement Change Requests in Bullhorn

Requesting a change request on a placement in different than a rate card change request. This is used to end assignments, change time approvers, work weeks or any other field found on the edit section of the placement. The reason for a change request is for an SMG team member to review before any changes go into effect.

Creation Date: Apr 30, 2024

Created By: Shane Burrell

View most recent version

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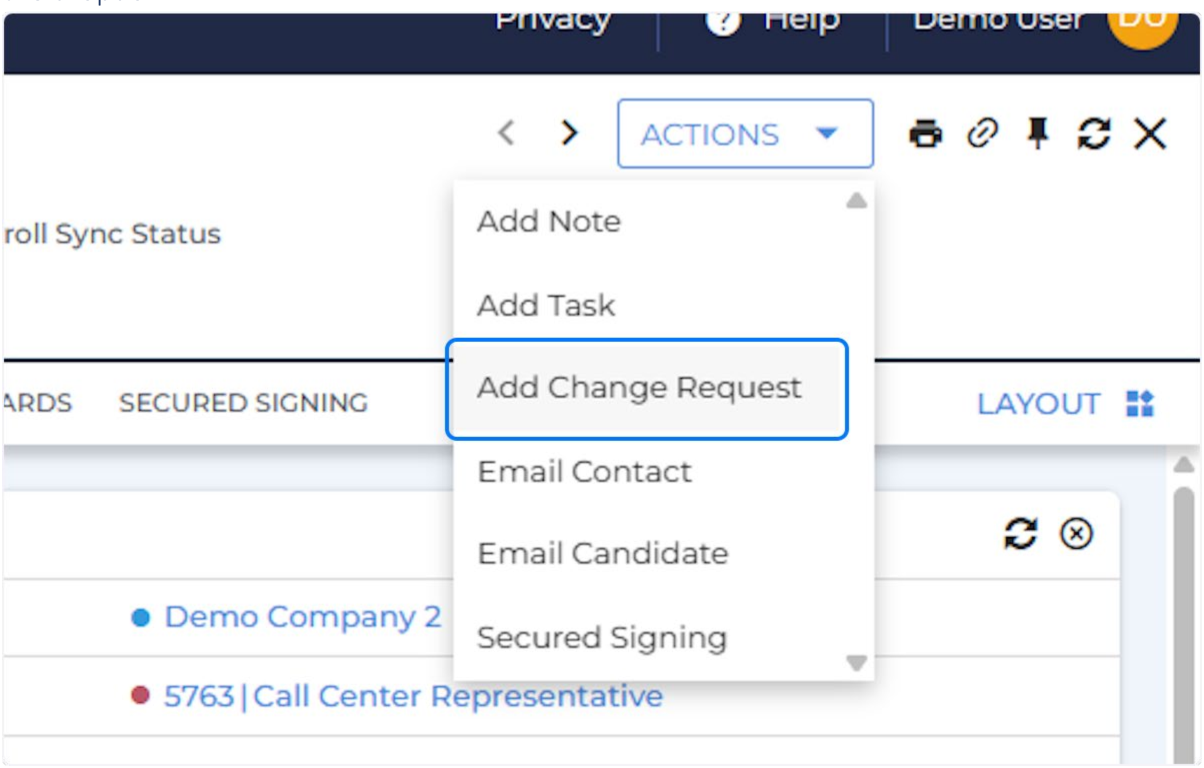
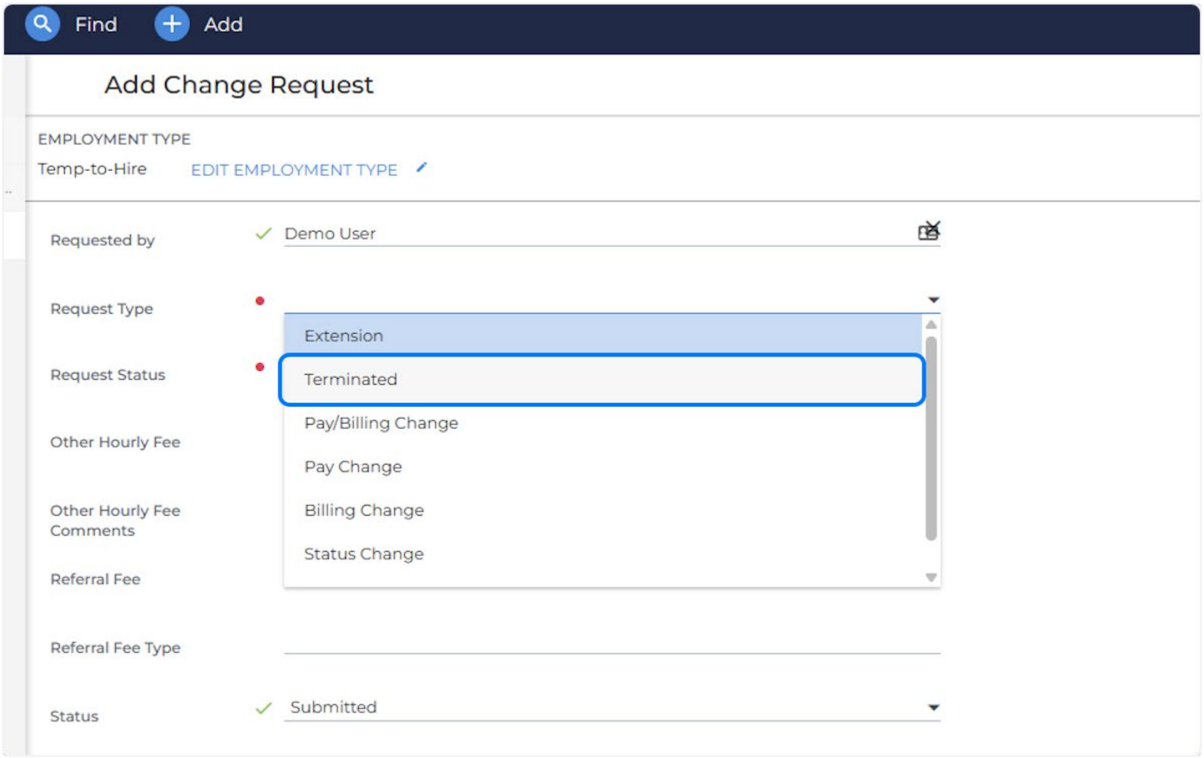
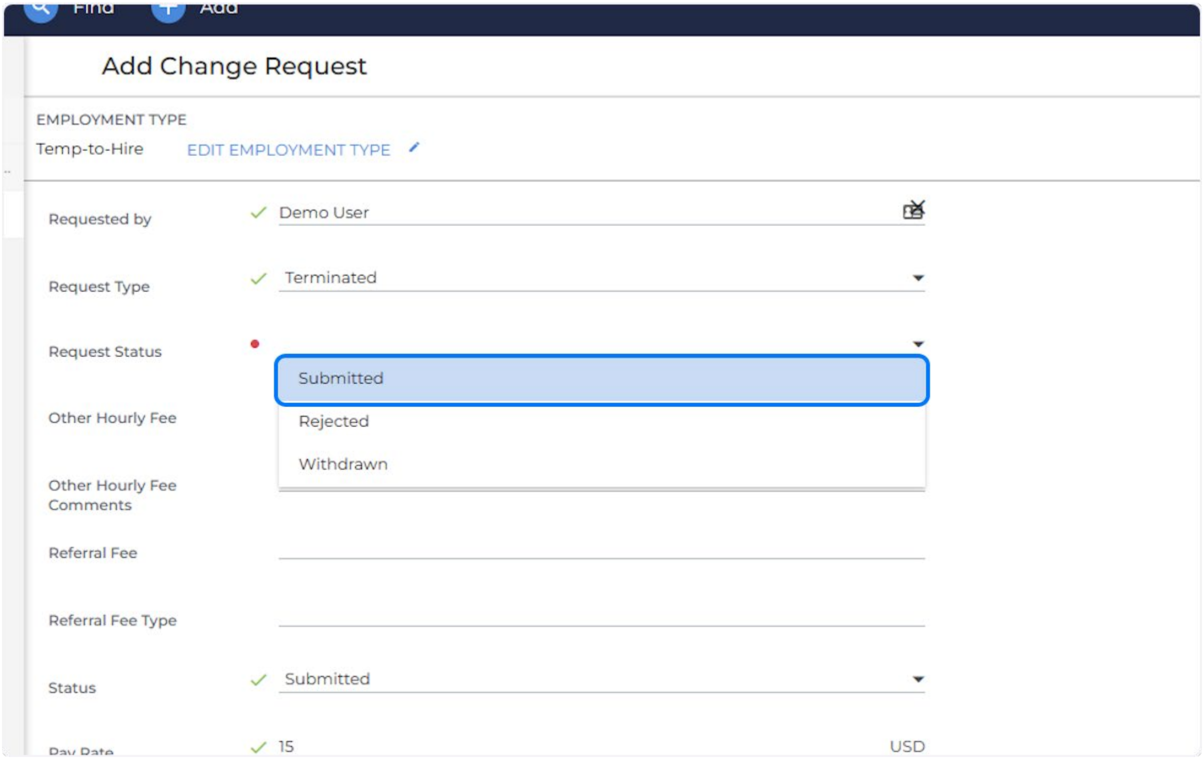
1. On the placement record, click on the ACTIONS button and select Add Change Request from the dropdown.



2. Select the request type that needs to be processed by the SMG team.



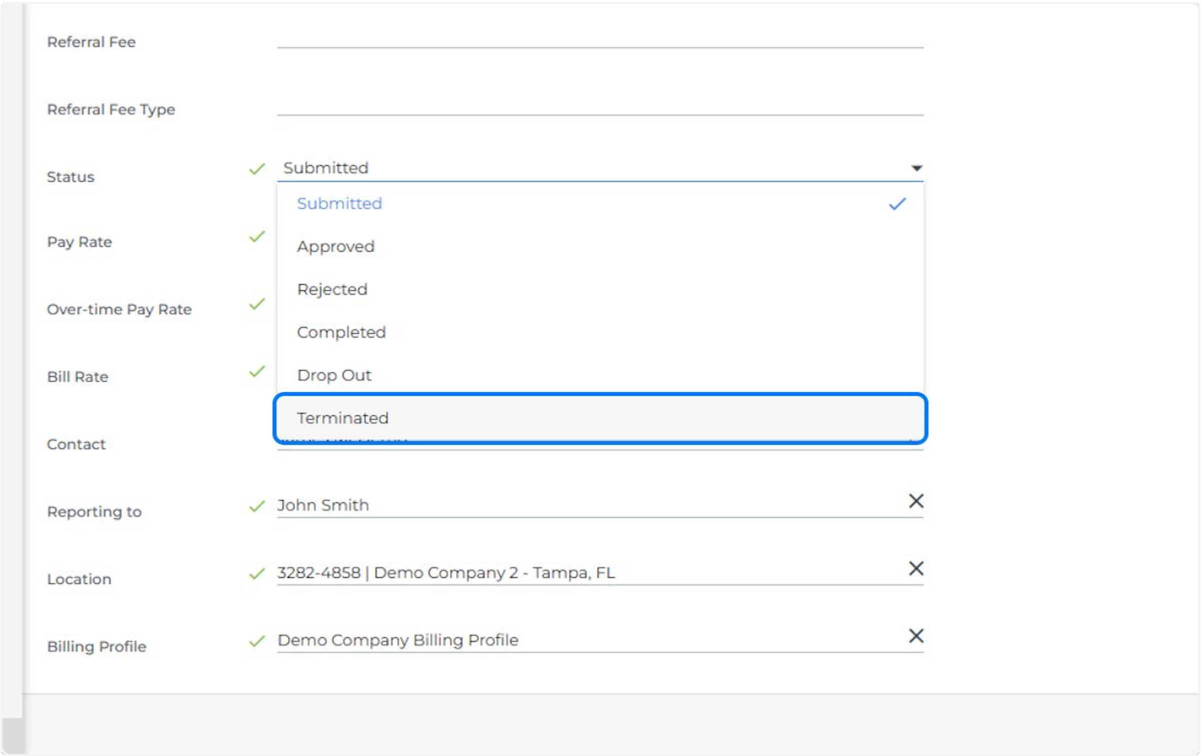
3. Set the request type to Submitted, unless you are updating an old change request that hasn't been approved yet.



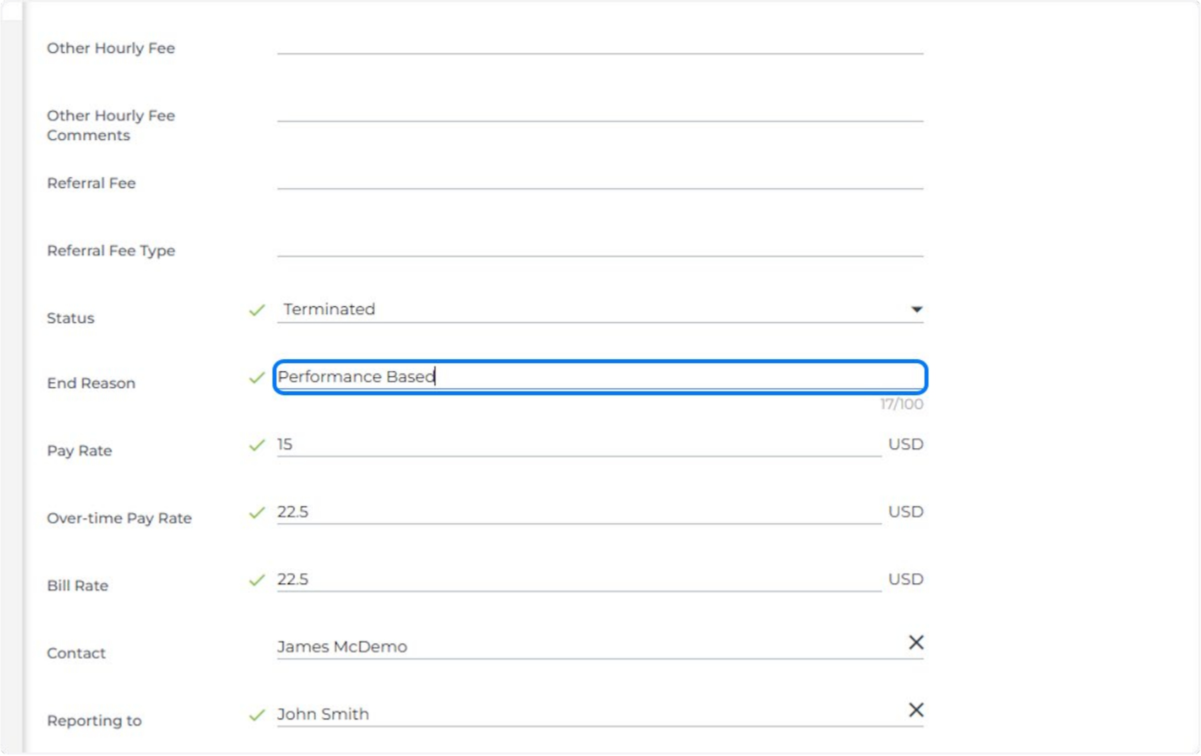
4. If ending the assignment, change the Status field to either Terminated, Drop Out or Completed.

Note:

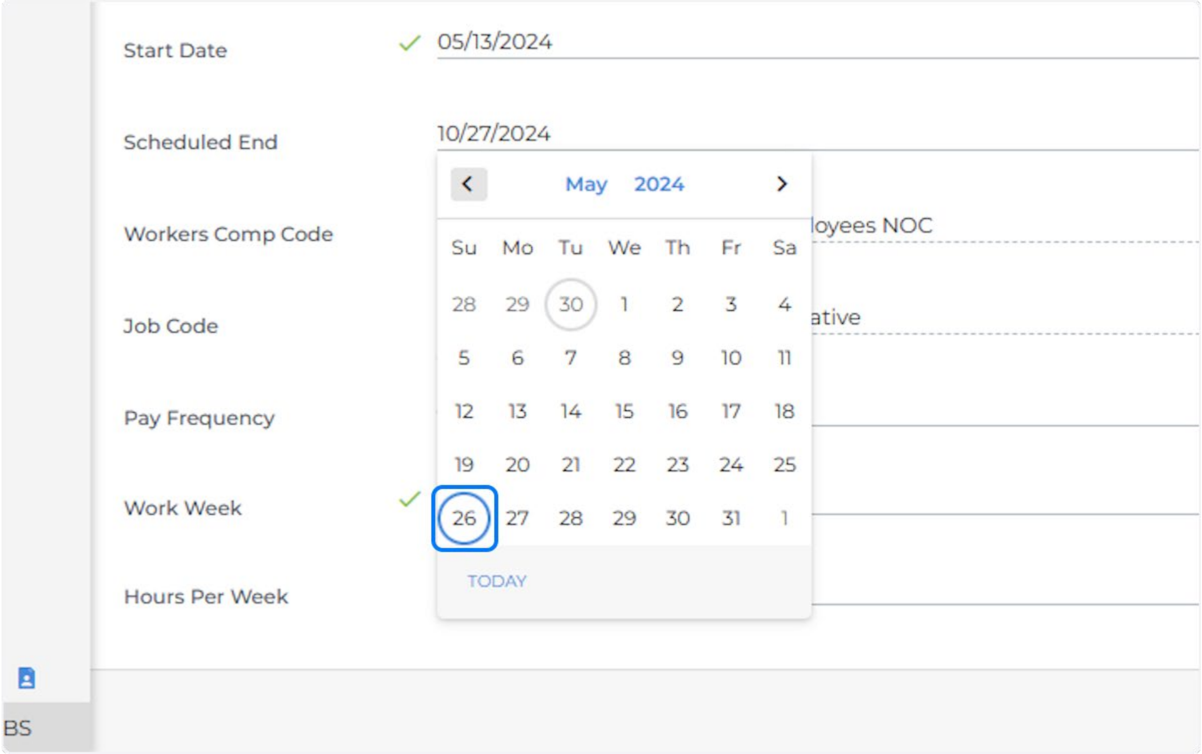
- Terminated: The employee was let go by the end user customer or staffing firm.
- Drop Out: The employee quit or No call, no showed.
- Completed: The assignment has come to an end without any terminations or quitting.



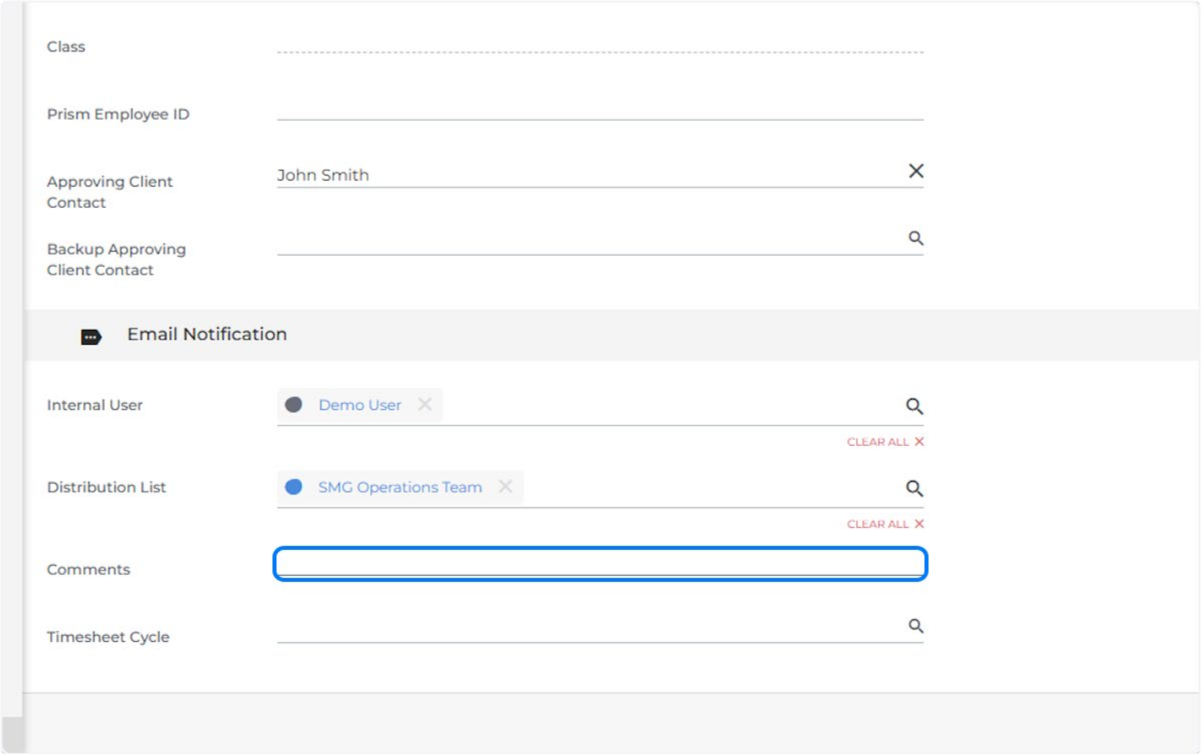
5. If you select Terminated, Drop Out or Completed, then the End Reason field will populate and require a reason.



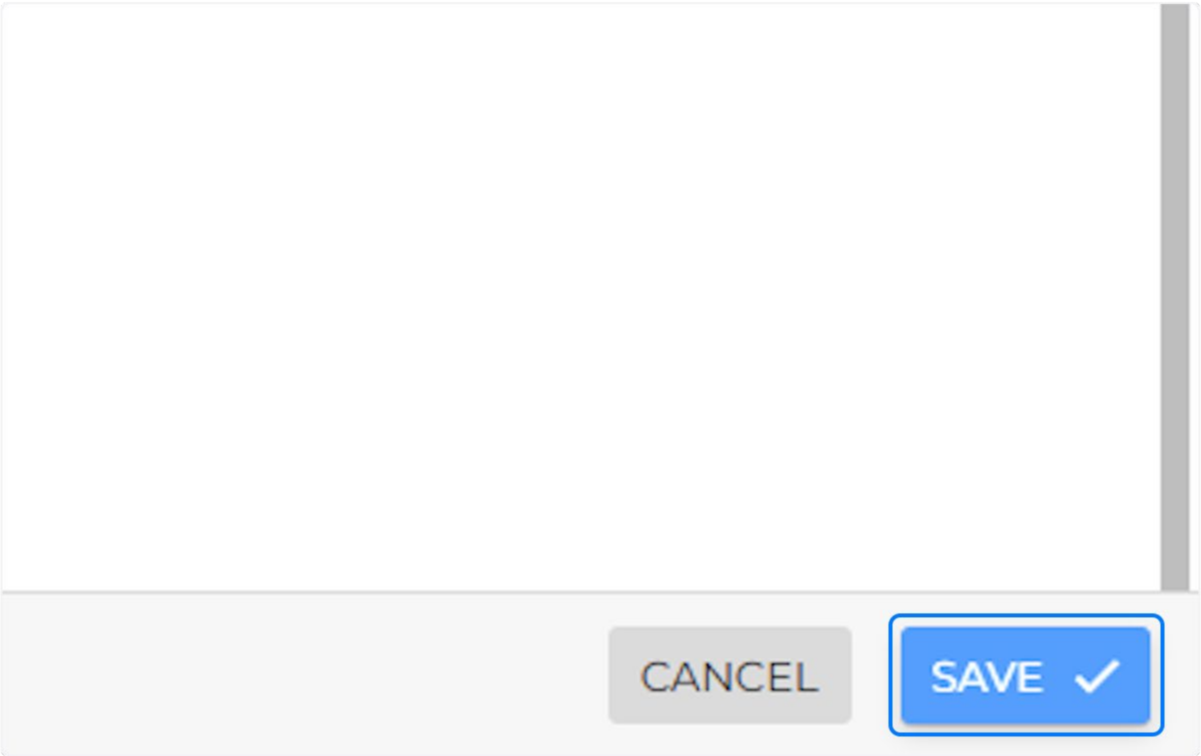
6. If the assignment is ending, then select an end date for the assignment to close out by using the Scheduled End date picker.



7. Add any Comments that need to be mentioned to the SMG team.

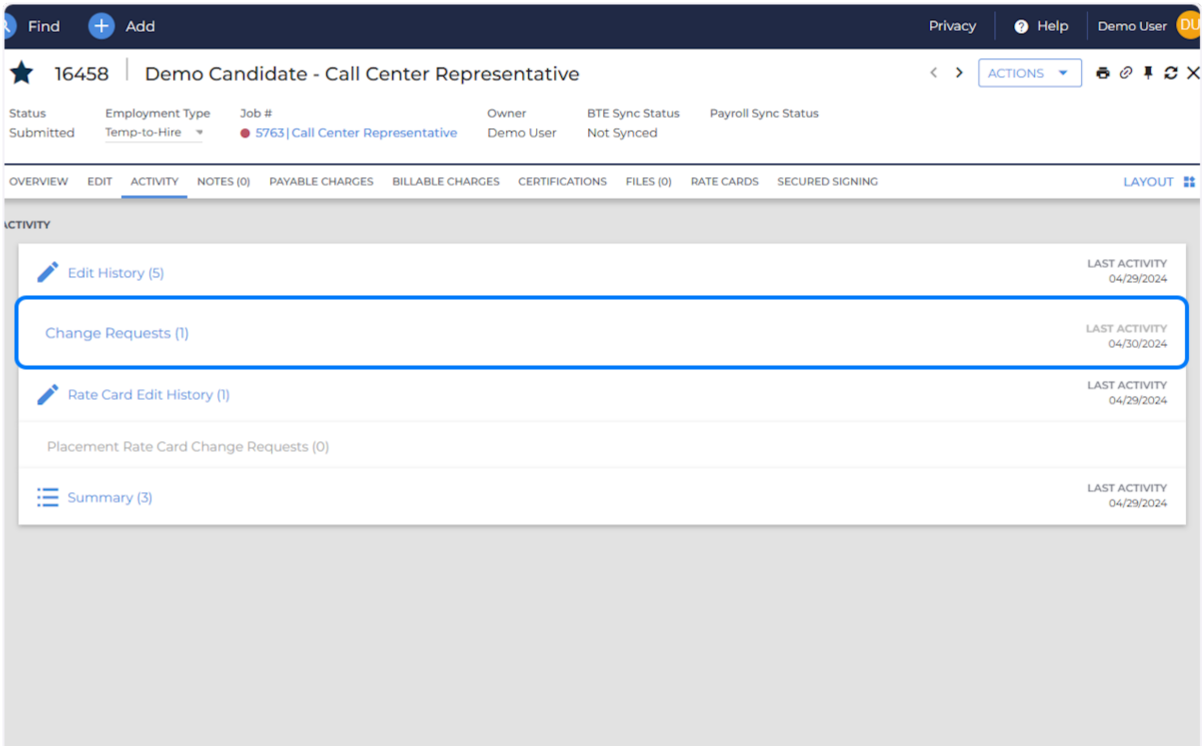


8. Click on SAVE

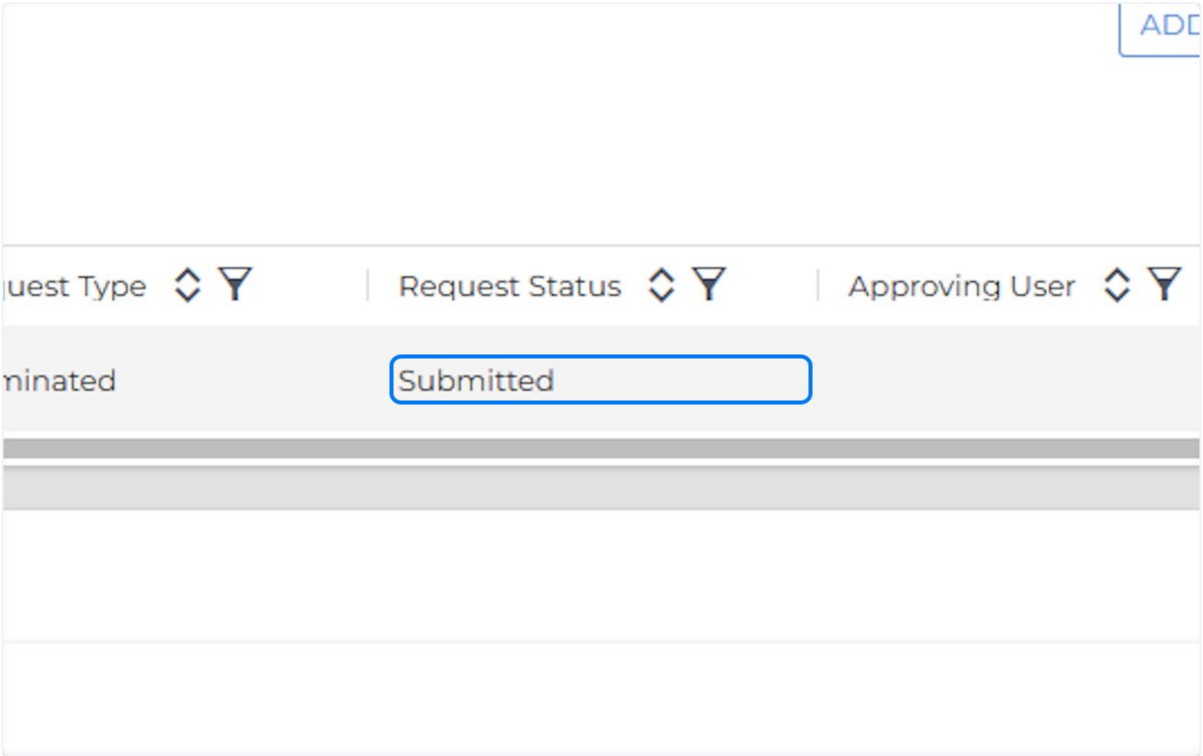


An email will be sent to the team and any internal users included in the email notifications section.

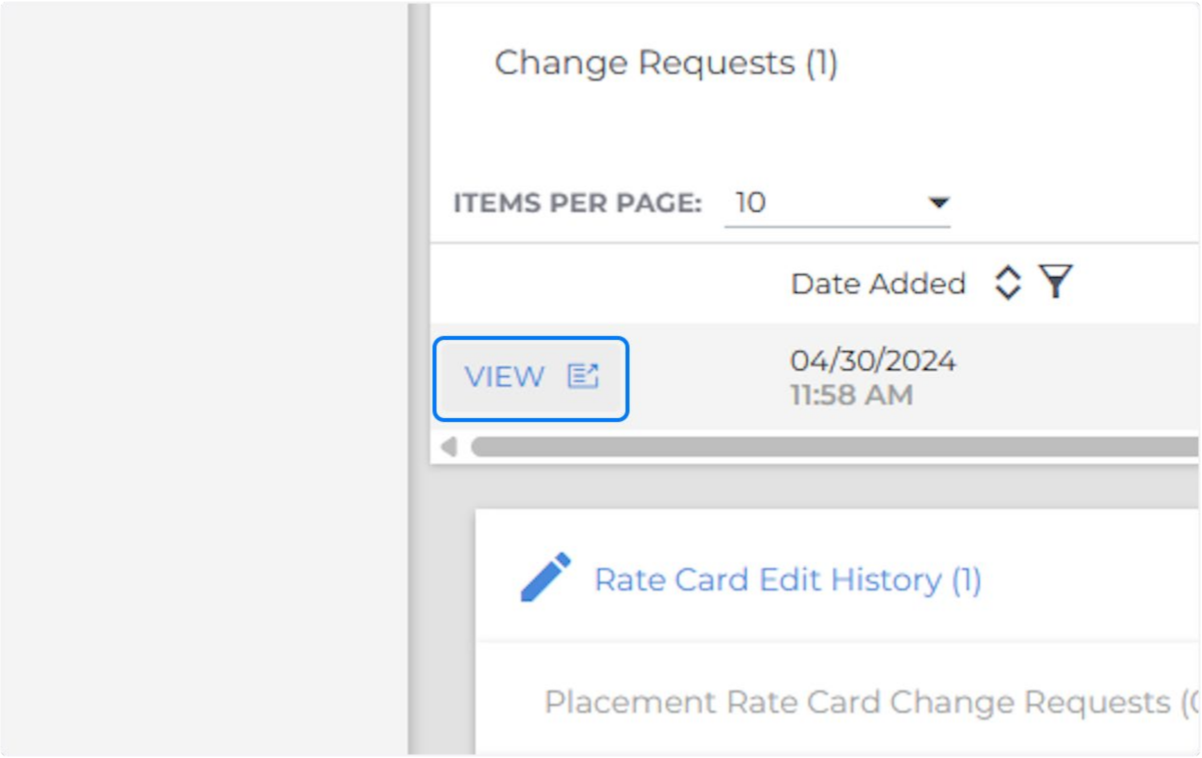
9. To review the status of your change request, navigate to the Activity Tab then Change Request section.



10. You will be able to see the current status of the request in the Request Status column.



11. Click on VIEW to see the details of the change request or to make any edits necessary.



12. From this view, you can see the changes that you requested and also select the EDIT button to make any additional adjustments, if it has not been approved yet.