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Settings

Add Users

As an HR Administrator you may have other team members who need to create jobs, post job and manage candidates. We refer to those users as Recruiting Staff.

1. To add Recruiting Staff click the Settings options in the Recruiting file menu.

2. By default, you will be on the Add Users tab. To add recruiting staff, click the + Add Recruiting Staff link.

   NOTE: If the Add Users tab is not visible, you may not have the necessary permissions.

3. Click into the Search Employees box and begin typing the name of the recruiter you want to add or use the Search Employees drop down menu. This data is pulled from all active employees in Web Pay.
4. Select employee to be added and to confirm click the **Add** button.

5. Once added you will see the new individual in the Recruiting staff list.

6. Click the **X** in the **Remove** column to delete users – to confirm deletion click **Confirm Remove**.

**NOTE**: If you delete a user that is assigned to a job, the system will notify you of the jobs they are assigned to and when you confirm deleting, those individuals will be removed from the jobs.
Admin Security Groups

As an HR Admin you may have other team members who need to have Admin rights in the Recruiting module (but not in Web Pay). This access gives the ability to manage recruiting staff permissions, HR Admin permissions (in Web Pay) and to create jobs, post jobs and manage candidates. We refer to these users as HR Admin.

NOTE: By default, the Company Admin is automatically listed as the Recruiting Administrator.

Permissions levels that have access to Admin Security Group are:

- Service Bureau
- HR Admins

1. To add HR Admin Staff, click the Settings options in the Recruiting file menu.

2. Click the Admin Security Groups option on the left hand side.

3. Click on Employees in Set to determine which employees are included in the applicable Web Pay Security Group.

4. Toggle ON/OFF in Administrator Permissions to enable Recruiting Admin security rights. Clicking ON will automatically add employee(s) under Recruiting Administrators at the top of the page.
NOTE: Once toggled on the users will see the Recruiting module in Web Pay and have full HR Admin rights ONLY in the Recruiting module, not in Web Pay.

NOTE: Recruiting Admin are added based on their security group in WP. The entire group must be added as individual users cannot be added as Recruiting Admin.
Application

Configuring the Job Application

This gives an Admin more flexibility when configuring the job application page to include what they would like to receive from job seekers.

1. From Settings, click Application from the left hand navigation bar.

   NOTE: The Setting options at the top of the page are global for every job within the module. It is not customizable or configurable by individual jobs.

2. Toggle ON/OFF the Require Resume field.

   a. Toggle ON if you only want applicants applying who have a resume to upload.
      i. If toggled ON, job seekers will get a popup stating to upload their resume and Web Recruiting will automatically fill out their application.
      ii. Click Upload Resume button. This will validate if any information is missing.
   b. Toggle OFF if you do not require a resume from applicants.

      NOTE: Applicants still have the ability to upload a resume and have it parsed, even though not required.

3. Toggle ON/OFF the Preview Application Before Submission

   a. Toggle ON to allow applicants an opportunity to preview their application before submitting.
      i. Applicants can select the pencil icon to edit their application.
   b. Toggle OFF if you do not want applicants to preview their application before submitting.

4. Toggle ON/OFF Display EEO, Disability & Veteran on Candidate Dashboard

   a. Toggle ON to display the view of EEO & OFCCP data (e.g., Gender, Military Service and Racial or Ethnic Group, of job applicants from those who view candidates)

      NOTE: This displays data to recruiters, hiring managers and team members on the Candidate Profile page.

   b. Toggle OFF to hide the view of EEO & OFCCP data.

5. In the Edit Application section, users can configure by sections which information is needed from the applicant based on their company needs.

6. Select the collapse (A) or expand (v) icon to hide or display the sections as needed – Information, Work History, Education History, References, and EEO, OFCCP, E-Verify, Acknowledgement.

7. Once expanded, choose to Include or Exclude the field from the job application.

   NOTE: Introduction text fields appear within every section.
8. Click on the Include icon in the Include column to display selected questions from that section on the application.

9. Once included, click the Required field to require the applicant to answer before submitting.

10. Click Save Application to save or Discard Changes to reject changes.
Custom Design

How to brand job seeker pages

Most companies that use an Applicant Tracking System (ATS) use the ATS to host their open positions on their corporate website. Below are instructions to brand the pages so the theme looks similar to your corporate website.

Permission levels that have access to Custom Design:
- Service Bureau
- HR Admins
- Recruiting Staff

1. To configure the branding, click the Settings options in the Recruiting file menu.

2. Click the Custom Design option.

3. Make the following changes if desired to match your corporate theme:
   a. Upload a logo
      i. Crop to specific dimensions, if necessary.
      ii. Only .jpg, .gif, & .png files are accepted.
      iii. Select Remove Logo to remove an uploaded logo.
   b. Change the font
      i. Use the Font drop down to customize the font.
   c. Select Edit to customize the background color, button color, and link color.
i. Click the palette to choose a color or enter a specific six-digit hex code (e.g., #FFFFFF for white) for an exact color.

4. Instantly see a Live Preview of your changes on the right hand side of the screen.

5. Click Save to save all design changes or Discard Changes to revert to default branding.
6. Listing page with new theme:

**Network Virtualization Engineer**
Arlington Heights, IL - 08/08/16 - Position Overview: At Paylocity, we are committed to...

**Software Engineer**
Arlington Heights, IL - 08/08/16 - Delivering one-of-a-kind cloud technology. acco...

**Quality Assurance Engineer**
Lake Mary, FL - 08/08/16 - COMPANY PROFILE: Global leader in credit informatio...

**.NET Developer**
Arlington Heights, IL - 08/04/16 - Job Responsibilities of the .NET Developer / Sof...

1 - 4 of 4 Items
Integrations

Navigate to Integrations to give you a quick glance into our recruiting partners and to assist you in setting up seamless integration.

1. To setup integrations with our recruiting partners, click the Settings options in the Recruiting file menu.

2. Click the Integrations option.

Learn more about our recruiting partners:

- **Checkr**
  - Provides compliant background checks for global enterprises and startups.

- **Indeed**
  - Automatically list public jobs to Indeed.com.

  NOTE: Indeed pulls jobs every 4-6 hours.

- **JobTarget**
  - Through a single platform, create, distribute and manage your job posts across a network of 20,000 job sites.

3. Click the Setup box to launch integration setup.
Automated Email Reply

On the **Settings** page you have the ability to customize and enable an automatic email notification which is emailed to every job seeker after they have applied to a position.

1. Select **Automated Email Reply**.

2. Enter text for required **Email Subject**.

3. Toggle the **Automated Email Reply** switch to Enabled or Disabled.

   Once Enabled, Web Recruiting will automatically generate an email response each time a candidate submits an application. This is sent using a no-reply email address and delivered to the email address supplied by the candidate in their job application.

   **NOTE:** This is disabled by default.

4. Create a custom email within the **Email Body Copy (required)** field.

5. Select rich text formatting options, such as **Bold**, **Italics**, **Underline**, **Bullets** or **Numbered Lists** as needed for your email.
6. Select a drop down from **Insert Placeholder** to auto-insert Candidate First Name, Candidate Full Name, Company Name, Job Description URL, and Job Title within the **Email Body Copy (required)** field.

   NOTE: When the email is generated, Web Recruiting will automatically update these placeholders with candidate and job specific data providing a more personalized response.

   Edits can be made directly in editor or paste text into **Email Body Copy**.

7. When complete, click **Save Email Reply** to save email.

8. Select **Discard Changes** or **Reset to Default**, if necessary.

9. Click **Feedback or Questions?** to provide insight on the page and/or pose a question.
Templates

Email Templates

Streamline and standardize communication to candidates that can be sent to candidates at various stages in the recruiting process. Requests for additional information, scheduling interviews and extending job offers are a few examples of how email templates can be used.

Email Templates can be used in two ways:

- Sent Automatically – when assigned to a Custom Workflow step, the email will be sent automatically when applicants are assigned to that workflow step.
- Sent Manually – from the Candidate Profile page the recruiting team can select an email template, modify it if necessary and send it.

From the Settings page you will have the ability to create unlimited custom email templates that can be selected and used from the candidate dashboard page.

The feature includes the following options:
- Create unlimited Email Templates
- 5 default email templates provided which can be edited to reflect your company’s brand
- Allow job seekers to reply to the Users email address or a No Reply email address (for Rejection Emails)
- Compose emails from the Candidate’s profile page

1. From the Settings page, create a new email template or edit/copy one of the 5 default email templates provided.
To create a new email template:

1. Click + Create Email Template.

2. Enter unique name in **Email Template Name (required)** to make it easily identifiable to recruiters and hiring managers.

3. In the **From** field drop down, select the default behavior of the address the email is being sent from.
   a. **If Work Email** is selected the system will use the sender’s work email address allowing job seekers to reply to that email address.

   **NOTE:** If no user email address exists in Web Pay, the From Work Email option will not be displayed, only the No Reply email option.

   b. **If No Reply** is selected any replies will be directed to a dead email address.

4. Enter text for **Email Subject (required)**.

5. Enter email text in **Email Body (required)** box.

6. Use built in rich text editing tools to add formatting, such as **Bold**, **Italics**, **Underline**, Bulleted List or Numbered List.

7. Select a drop down from **Insert Placeholder** to auto-insert Candidate First Name, Candidate Full Name, Company Name, Job Description URL, Job Title and User Name within the **Email Body (required)** field.
8. To add attachments, click on **Select file(s) from computer** to navigate to the location of the files on your computer.

   **NOTE:** Limit of 10 files, 4MB per file and 20MB total can be attached.

9. Once configured, click **Save Email Template** to save or **Cancel** to discard email template.

10. Select one of five preloaded email templates or previously created templates to **edit**, **duplicate** or **delete** as necessary.
Manage custom email templates

Use email templates to quickly correspond with candidates. Assign custom email templates in workflows to automatically send when a candidate has been assigned to a specific stage in the hiring process.

<table>
<thead>
<tr>
<th>Create Email Template</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Arrange a call</strong></td>
</tr>
<tr>
<td><strong>Arrange an interview</strong></td>
</tr>
<tr>
<td><strong>New job opportunity</strong></td>
</tr>
<tr>
<td><strong>Offer letter</strong></td>
</tr>
<tr>
<td><strong>Rejection</strong></td>
</tr>
<tr>
<td><strong>Rejection, Post Interview</strong></td>
</tr>
</tbody>
</table>

**Arrange a call**
Dear [Candidate Name],
Thanks for your interest in our organization! We'd like to set up a call with you to discuss the [Job Title] opportunity. Can you please provide your availability for the next few days so that we can make arrangements?

**Arrange an interview**
Dear [Candidate Name],
We're excited to inform you that we would like to bring you in for an interview for the [Job Title] opportunity! Please reply with your availability over the next few days to do so in person. Our team is looking forward to meeting with you.

**New job opportunity**
Dear [Candidate Name],
We have started hiring for a newly opened position, [Job Title], which we think you may be interested in. You can read the full job description and apply today at [link].

**Offer letter**
Dear [Candidate Name],
First, congratulations! We are very excited to formally offer you the position of [Job Title]. This offer is valid for 30 days. If you accept our offer, please reply and we will provide a formal contract.

**Rejection**
Dear [Candidate Name],
Thank you for your interest in our organization. Unfortunately, we have decided not to pursue your application at this time. We wish you the best of luck in your job search.

**Rejection, Post Interview**
Dear [Candidate Name],
I would like to thank you for taking the time to discuss the [Job Title] opportunity with us. We regret to inform you that we have decided not to pursue your application at this time. We wish you the best of luck in your job search.
Workflows

As a recruiter or HR administrator you will want custom workflows that reflect the specific workflow of the type of job being applied for.

For example, for Software Engineers you may have the following workflow:
- Phone screen
- In-person interview
- Group Interview
- Test
- Rejected
- Hired

But for a Customer Service Representative you may have the following workflow:
- Phone screen
- In-person interview
- In-person interview
- Rejected
- Hired

This feature allows you to create an unlimited number of custom workflows that align with your company’s unique hiring process and assign them to the job level, making it easier and faster to manage your job candidates.

Permission levels that have access to Custom Workflows:
- Service Bureau
- HR Admins
- Recruiting Staff

1. To customize a workflow, click Settings in the Recruiting file menu.

2. Select the Workflows option.

To Create a Workflow from Scratch:

3. Click +Create Workflow from Scratch
NOTE: The 1st workflow item, **New Applications**, and last workflow item, **Offered**, are standard for all workflows and cannot be edited.

4. Enter a **Workflow Title (required)**.

   **TIP:** Naming the workflow the job title or category will make it easier when assigning.

5. Click the **+ Add Workflow Stage** link

   **TIP:** A stage can have any number of steps. Think of stages as categories. For example: you might have a Stage called Phone Screen, with the follow up steps within that stage.

   **TIP:** A Workflow can only have six total stages. Since the **New Applications** Stage and **Offered Stage** are included by default, you can only add four additional stages.

   - **Example Stage**
     - Phone Screen
• **Example Steps**
  - Schedule Phone Screen
  - Phone Screen Scheduled
  - Phone Screen Completed
  - Awaiting Phone Screen Results

6. Enter a **Stage Title** (required).

7. Click **Delete Stage** if you want to delete the stage in its entirety.

8. Enter name of step in the **Step Title** (required) field.
9. If desired, select a template from the **Automatically Send Email Template** dropdown to assign an email template to the step.

10. Click **+ Add Step** to add additional steps to the stage.

11. Rearrange the order of the steps by clicking the **handle** icon.

12. Select the **X** icon to delete any unnecessary steps.
13. Click **Save** or **Cancel** to save or reject the changes.

14. Select the collapse (Λ) or expand icon (v) to hide or display the steps.

15. Click the **handle** icon adjacent to the stage’s name and drag to desired location to re-arrange order of the stages.

16. To edit a stage, click the **pencil** icon.

17. Once the workflow is fully configured, click **Save and Close Workflow**.
## Create Workflow

### CS Rep Preview

<table>
<thead>
<tr>
<th>New Applications</th>
<th>Phone Screen</th>
<th>In Person Interview</th>
<th>Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Step</td>
<td>4 Steps</td>
<td>2 Steps</td>
<td>3 Steps</td>
</tr>
</tbody>
</table>

### Workflow Title (required)

CS Rep

### Edit Workflow Stages and Steps

Select a workflow below to edit its stages. Drag and drop stages to rearrange their order and even delete and add your own stages and steps.

#### New Applications

New Application

#### Phone Screen

- Schedule Phone Screen
- Phone Screen Scheduled
- Phone Screen Completed
- Awaiting Results

#### In Person Interview

- Interview Scheduled
- Interview Completed - Awaiting Results

#### Offered

- Offer Extended
- Offer Accepted
- Hired

---

**Add Workflow Stage**

---

### Save and Close Workflow
18. You can choose to **Copy**, **edit**, or **delete** your custom workflows as needed by selecting the appropriate icon.

   **NOTE:** Only Workflows that have never received applicants can be edited. If a Workflow was assigned to a job, and an applicant applied to that job with that workflow, that workflow can no longer be edited.

19. The number of **Active Jobs** tied to the workflow is shown to the right of the **Workflow Title**.

![Workflow Settings](images/WorkflowSettings.jpg)

20. Hover your cursor over the number of steps for each workflow’s stages to see a list of the **Step Titles**.

**Important Notes**

- Each workflow is comprised of stages and steps. Every workflow contains New Applications and Offered stages and can contain up to four additional stages. Each stage can contain an unlimited number of steps tailored to your hiring process.

- When choosing to **Update Workflow from Scratch**, Workflow Preview is displayed on top of page. As you add stages/steps the preview is updated in real time.

- Each stage should have a unique name and must contain at least one step.

- Custom Workflows display all previously created workflows including the default workflow.

Users can also create workflows from a Default Template:

1. To customize a default workflow, click **Settings** in the Recruiting file menu.

2. Select the **Workflows** option.

3. Click **Create Workflow from Default Template**.
NOTE: The number of steps in each stage will show in the Default Workflow Preview.

4. Enter a **Workflow Title** (required).

5. Select the **collapse (Λ)** or **expand icon (v)** to hide or display the steps.

6. Click the **handle** icon adjacent to the stage’s name and drag to desired location to re-arrange order of the stages.

7. Click the **pencil icon** next to the stage’s name to edit the Workflow Stage/Steps.

8. Enter a stage **Name**.

9. Click **Delete Stage** if you want to delete the stage in its entirety.

10. Update the steps by arranging the order (click the handle **icon**), updating the **Workflow Step Title**, if desired, selecting from the **Automatically Send Email Template** dropdown, delete the step (**click the X**), or opt to **+ Add Step**.
11. Click **Save** or **Cancel** to save or reject changes.

12. Once the workflow is fully configured, click **Save and Close Workflow**.
Screener Questions

Screener Questions allows you to identify top candidates early in the screening process by offering yes, no, multiple choice or short answer questions. Screener questions can also help prepare candidates for what will happen after an application is submitted; such as, pre-employment skill tests, background checks or drug screening and can help set expectations early on in the hiring process.

On the Settings page you will have the ability to create custom Screener Questions that can be selected and used from the Create New Job page.

The feature includes the following options:

- Create unlimited customer Screener Templates
- Adding unlimited Questions/Answers to a Template
- Assigning a Screener to a job posting
- Applicants will see the questions on the Application page
- Applicant’s answers will appear on the applications Candidate Dashboard profile

1. From the Settings page, click Screener Questions from the left hand navigation bar.

2. Click + Create Screener.

3. Add a Screener Title, then add as many questions of each question type you want to appear on a job application page. Drag and drop your question type into the Screener Preview section.
4. When adding questions to the **Screener Preview** section, you will be able to add any questions and answers and select which questions are required.

5. To add Multiple Choice questions:

   a. Drag **Multiple Choice** question type to the preview area.
   b. Enter in **Question** text.
   c. Enter text for **Answers** options.
   d. By default, the multiple choice answers include 4 answer fields. To add more answers, select **Add Answer** and additional answer fields will appear.
   e. To remove unwanted answers click the **X** icon.
   f. Optionally, check the **Required** box to make the question required. Applicants will not be able to submit an application unless all required questions have been answered.
   g. Click **Save** or **Cancel** to save or reject.
6. To add Text questions:

   a. Drag Text question type to the preview area.
   b. Enter in Question text.
   c. Choose Single Line or Paragraph in the Text Box Length field to adjust the available space for applicant’s to respond to the question.
   d. Optionally, check the Required box to make the question required. Applicants will not be able to submit an application unless all required questions have been answered.
   e. Click Save or Cancel to save or reject question.
7. Once saved, you can change the order in which questions appear on the job application by clicking the handle icon adjacent to the question and dragging it to the desired location.

8. Click the X icon to remove the question.

9. To reopen the set for editing click the pencil icon.

10. Once configured, scroll to the bottom of the page and click Save and Close Screener.
11. When on the **Create New Job** screen, users will see an option in the navigation for Screener Questions. On this screen you can use the drop down in the **Select Screener** field to choose the screener templates you want added to the job.
12. Once a **Screener Template** is selected, you will get a preview of the questions that will appear on the **Application**.

13. When the applicant is completing the **Application** form, the question will appear for them to answer.
My Settings

Setting Applicant Notifications

This feature allows notifications to be set up by the Recruiting Admin or Recruiter. These notifications will be sent to designated Recruiters and/or Hiring Managers when job seekers apply to jobs.

A Recruiting Admin or Recruiter can go into their Settings page and globally turn on this feature to receive updates on when job seekers apply.

1. From the header menu select Settings.
2. Select Notifications from the left side panel.
3. Enable On/Off in the Notification field to either receive an email notification for newly submitted applications for all published jobs or not.
4. Once toggled to On, select one of three options in the Frequency field drop:
   - Selecting Immediately after each new application will send an email to the assigned Recruiting Admin, Recruiter or Hiring Manager every time a candidate applies.
   - Selecting Daily, at beginning of each day will send to the assigned Recruiting Admin, Recruiter or Hiring Manager a daily summary of applicant totals.
   - Selecting Weekly, Friday morning of each week will send to the assigned Recruiting Admin, Recruiter or Hiring Manager a weekly summary of applicant totals.

NOTE: This is a global setting so for every job you are assigned to you will receive a notification based on the option selected.
5. Once enabled, the user will receive an email based on the frequency selected. 

NOTE: Email is sent to the account listed in Web Pay.
Recruiters Setting Notifications

Recruiters may want to set notifications for the hiring manager as well as themselves to receive updates on specific candidates and be notified when actions are taken with those candidates.

Notifications will continue until the candidate is entered in Onboarding or Web Pay or until notifications are stopped.

There are six actions that trigger a notification:

- Change in Status
- Editing Profile
- Emailing Candidate
- Moving Candidate
- Adding Notes
- Background Check Initiated

1. Select Jobs from the main header menu.

2. To find out who is already assigned to receive notifications for a particular job, select the ellipsis in the Action column for the position you want to set up a notification.


4. Select Hiring Process from the left hand panel to display Hiring Team assigned (Recruiters and Hiring Managers).

   NOTE: Team Members are not eligible to receive notifications.
5. Return to Jobs by selecting Jobs on the menu header.

6. Click on Title [ID] of job needing notifications.

7. Click the ellipsis icon following applicant’s name.

8. Select Set Notifications. This will display any Recruiter(s) or Hiring Manager(s) who are assigned to the job.

NOTE: Assigned Team Members will not appear as they cannot receive notifications.
9. Check the checkbox adjacent to the name of anyone who is to be notified of any changes.

10. Click **Save** to save selections.

![Assign Candidate Notifications](image)

11. Once saved, applicant will have a bell icon indicating that you are following the applicant.

![Customer Service Rep](image)

To display all the applicants you are following:

1. Click **Settings** on the menu header.

2. Select **Notifications** in the left hand panel.

In the **Activity Notifications** section, everyone you are following will be displayed.
3. Click the bell icon to remove following.

![Settings](image)

**What actions will send out notifications:**

- Change in Status – Select **Change Status**
- Editing Profile – Click the ellipsis icon and select **Edit Job**
- Emailing Candidate – Select **Email** to email candidate within the platform
- Moving Candidate – Check **checkbox** of applicant in left hand panel to move to another job
- Adding Notes – Select **Feed** to add a public note (not private)
- Background Check Initiated – Select **Background Check**

**NOTE:** Notifications are only sent to people who are listed as following a candidate with the exception of the one who initiated the action.

4. Email will be sent to your designated email address.

![Email](image)

**Sample of email:** Displays who took the action and what the change was.
ATS Recruiter just changed Charles Smith’s Status,

From: New Application
To: Scheduled Phone Screen

View Charles’s profile by accessing Recruiting from Paylocity’s application menu upon logging in.

Log In

To view and unsubscribe from notifications, log into Web Recruiting and view your notifications settings under Settings > Notifications
Following Notifications

This feature allows Hiring Managers to set their own notifications to follow candidates through the hiring process. Once set, this follow notification will trigger emails for the same actions as if it were set up by the Recruiter.

There are six actions that trigger a notification:

- Change in Status
- Editing Profile
- Emailing Candidate
- Moving Candidate
- Adding Notes
- Background Check Initiated

To setup following notifications:

1. Click on Jobs on the main header.
2. Click on Title [ID] of position.
3. Click the ellipsis icon following the candidates name.
4. Select Follow from dropdown.
   
   NOTE: If you are currently following candidate, Unfollow will appear in dropdown instead of Follow.

5. A bell icon will appear next to candidates name in left hand panel to indicate that you are following the applicant.
To remove following notifications:

1. Click on Jobs on the main header.

2. Click on Title [ID] of position.

3. Click the ellipsis icon following the candidates name.

4. Select UnFollow from dropdown.

To view all the applicants you are following:

1. Select Settings from main header bar.

2. Select Notifications from the left hand panel.

3. All applicants that have been set up for following will display in the Activity Notifications section.

4. If needed, remove following an applicant by clicking the slashed bell icon.
Settings

New Candidate Notification
Receive an email notification for newly submitted applications for all published jobs
Notification | Frequency
--- | ---
off | Immediately after each new application
On

Activity Notifications

<table>
<thead>
<tr>
<th>Candidate, Job</th>
<th>Status</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charles Smith</td>
<td>Customer Service Rep</td>
<td>New Application</td>
</tr>
</tbody>
</table>
Candidates

Search Candidates

This feature displays a listing of all candidates, date and job applied for and status.

Permission levels that have access to View Candidates:

- Service Bureau
- HR Admins
- Recruiting Staff

1. If you have HR Admin or Recruiting Staff permission, you will see a menu tab that reads Candidates.

2. When clicking the Candidates menu option you will see a list of all candidates who have applied to any job for your company.

3. Use the Search Name, Job or Status section to expand or limit the display of information.

4. Clicking on any column header title will sort the column’s information.

5. When clicking on applicant’s Name you will be directed to their candidate profile page.

6. Click on Job [ID] to display all candidates in the New Application stage who have applied for the position.

<table>
<thead>
<tr>
<th>Applied</th>
<th>Name</th>
<th>Job [ID]</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/27/17</td>
<td>Annette Leman</td>
<td>Administrative Assistant</td>
<td>New Application</td>
</tr>
<tr>
<td>06/26/17</td>
<td>Dan Sullivan</td>
<td>Administrative Assistant</td>
<td>New Application</td>
</tr>
<tr>
<td>06/26/17</td>
<td>Harold Young</td>
<td>Administrative Assistant</td>
<td>New Application</td>
</tr>
<tr>
<td>06/22/17</td>
<td>Julie Silver</td>
<td>Administrative Assistant</td>
<td>New Application</td>
</tr>
</tbody>
</table>
Candidates Dashboard

The Candidates Dashboard screen allows recruiters and hiring managers to review candidates who have applied for a position and manage them through the customized recruiting workflow for each job.

The Candidates Dashboard is comprised of three panels:

- Top panel displays each of the stages in the recruiting workflow that has been associated with the job.
- The panel on the left displays a list of candidates within the selected stage. This section will also allow you to manage multiple candidates.
- The main panel contains candidate details.

Top Panel Display:

1. Click the applicable link to access candidates in different stages of the process.

   ![Candidate Dashboard](image)

   As a Recruiter, HR Admin, Hiring Manager, you may have sourced your candidates from LinkedIn or received a resume by email. Users can manually add a candidate to a job from the Candidate Dashboard page.

To Manually Add a Candidate:

1. Select + Add Candidate to manually add a candidate to the job.

2. Upload Resume by clicking Select File to Upload and browsing out to stored location.

3. If you check the Fill out application with my resume checkbox, the system will do its best to parse the resume and automatically fill in all the fields.

   NOTE: First and Last names are the only required fields.

4. Enter Contact Information, Work History, Education, as applicable.

5. Click Save Profile or Cancel to save or discard changes. Users will be returned to the Candidate Dashboard and the manually added candidate’s profile will now be added to the New Application workflow stage.
Multiple Candidate Management

1. In the left hand panel, users have the ability to select multiple candidates at once by checking the check box adjacent to the candidate(s) name.

2. Once a checkbox is selected, Select All and Deselect All will be displayed.

3. Click Select All to automatically check all candidates listed in left hand panel. Deselect All will uncheck any selected candidates.
4. Once candidate(s) are selected, users have the ability to:

a. Move single or multiple candidates to a new status by selecting status in **Change Status** dropdown. Example: Rejecting all applicants if you found a hire for the position. Emails can also be automatically sent if an Email Template is assigned to the rejection workflow step.

b. Move single or multiple candidates to a new position by selecting job in **Move to Another Job** dropdown.

   NOTE: If you navigate to the new job you moved the candidate to, and view the Candidate Dashboard for that job, the moved candidate will now be in the New Application stage of the job.

c. Email single or multiple candidates at once by selecting **Email All Candidates**.

d. **Compose Email** screen will allow users to create an email or select a previously created email template and **Send Email** once complete.
Main Panel Display:

1. Click the applicant’s name from the left hand panel to open the candidate’s individual profile.

2. Candidate’s name, phone(s), email address and address is displayed.

3. Select the ellipsis icon next to the applicant’s name to Edit Candidate information, Share Candidate, Follow or Set Notifications.
   - Once updated, click the Save Profile or Cancel button to save or discard changes.

4. Select a status from the Change Status drop down to update status or move candidate to the next step in the recruiting process. Click desired next step for candidate.
   
   NOTE: The Change Status drop down menu displays each of the stages and steps within the workflow for that position.

5. By default, the Feed section displays to add or edit notes about the candidate. Create notes of next steps taken and impressions of applicants.

6. Enter note text in Add Note field.

7. Select from the Visible To dropdown either Everyone, Recruiting Staff or Only Me.
   
   NOTE: By default, the note can be viewed by Everyone.

   NOTE: Keep in mind, Recruiting Admin will have access to view any notes added to the feed.
   - If Recruiting Staff is selected, only Recruiters will have access to the notes, not hiring managers or team members.
   - Select Only Me to avoid having other members of the recruiting team to have access.
   
   NOTE: When you print the application, only those designated to view the note along with the HR Admin will see the note.

8. Click Add Note to save note or Clear Note to discard notation.
9. Select **Information** to review or print the candidate’s documents (Application, Resume or Cover Letter) including Personal Information, Work History, Education.

10. Select **Email** to send an email to the candidate, then select + **Compose Email**.

   NOTE: Compose email by either writing one from scratch or selecting a template.

**To select a template:**

1. Select desired **Email Template** from the dropdown menu. Email will populate based on template setup.
2. Select in the **From** field drop down the default behavior of the address the email is being sent from.
3. If **Work Email** is selected, the system will use the sender’s work email address allowing job seekers to reply to that email address.
   
   NOTE: If the recruiter does not have an email on file in Web Pay, then the only option that will appear is Work Email.
4. If **No Reply** is selected, any replies will be directed to a dead email address.
5. Edit **Email Subject (required)** field as necessary.
6. Enter changes as needed within the **Email Body (required)** field.
7. Select rich text formatting options, such as **Bold, Italics, Underline, Bullets or Numbered Lists** as needed for your email.
8. Select a drop down from **Insert Placeholder** to auto-insert Candidate First Name, Candidate Full Name, Company Name, Job Description URL, Job Title and User Name within the **Email Body (required)** field.
9. To add attachments, click on **Select file(s) from computer** to navigate to the location of the files on your computer.
   
   NOTE: Limit of 10 files, 4MB per file and 20MB total can be attached.
10. Once configured, click **Send Email** to send or **Cancel** to discard email template.

**To manually compose email:**

1. Select **None** for **Email Template** from the dropdown menu.
2. Select in the **From** field drop down the default behavior of the address the email is being sent from.
3. If **Work Email** is selected, the system will use the sender’s work email address allowing job seekers to reply to that email address.
   
   NOTE: If the recruiter does not have an email on file in Web Pay, then the only option that will appear is Work Email.
4. If **No Reply** is selected, any replies will be directed to a dead email address.
5. Enter **Email Subject (required)**.
6. Compose email within **Email Body (required)** field.
7. Select rich text formatting options, such as Bold, Italics, Underline, Bullets or Numbered Lists as needed for your email.

8. Select a drop down from Insert Placeholder to auto-insert Candidate First Name, Candidate Full Name, Company Name, Job Description URL, Job Title and User Name within the Email Body (required) field.

9. To add attachments, click on Select file(s) from computer to navigate to the location of the files on your computer.

   NOTE: Limit of 10 files, 4MB per file and 20MB total can be attached.

10. Once configured, click Send Email to send or Cancel to discard email template.

1. Select Background Check to sign up with Checkr, our recruiting partner.

   NOTE: Integration with Checkr will only occur once an account is setup.

   NOTE: All Recruiting Admin have access to setup or edit their Checkr integration.

2. Click Learn More at Checkr to be directed to the Checkr website.

3. Click the Connect button to be redirected to a Checkr/Paylocity page (opens in new tab called Checkr Partners and is a Checkr website). There you can sign up for an account on Checkr.com, complete the Checkr onboarding process, account creation and package selections for your company.

4. To create an account enter the following information:

   • Full Name
   • Company Name
   • Email Address
   • Phone
   • Create a Password – must be 8 or more characters, with at least 1 uppercase, 1 lowercase and 1 number.
   • Select from the Estimated Monthly Volume field drop down approximately how many background checks you expect to run each month.
   • Click Continue button.

5. Payment Information screen displays different packages available and pricing.

6. Fill out payment information.

7. Click Continue button.

8. Verification screen displays additional information needed.

   • Legal Business Name
   • Select from the Industry field drop down your company’s industry.
   • Doing Business As (DBA)
   • Tax ID/EIN
   • Select Number of Employees from drop down
• Select State of Incorporation from drop down
• Company Website
• Select Tax Classification from drop down.
• Select Purpose from drop down.
• Complete Address information – Street, City, Zip Code
• Select State from drop down
• Phone Number

9. Click **Submit** button.

Checkr will notify you in 1-3 business days so that you can begin ordering background checks.

To remove integration or edit your Checkr account:

1. Click **Settings**, if you are a Recruiting Admin.

2. Select **Integrations** from the left hand panel.

3. Click **Edit Integration**. This will open a drawer to edit Checkr.

4. Select one of the following buttons to take you to login to Checkr and update your profile:
   - Edit Account in Checkr under **Edit Checkr Account**.
   - Contact Checkr to add packages under **Edit Background Check Packages**.
   - Under Remove Checkr select **Remove Checkr** button.

To run background check on applicant who already has email address in their applicant profile:

1. Click **Jobs** from main header menu.

2. Select **Title [ID]**.

3. Click **Candidates Name** on left hand panel to display candidate information.

4. Click **Background Check** link.

   NOTE: Background Check link only displays if Checkr integration is connected.

5. Select **Package** using drop down on Background Check popup. Package drop down shows all packages that are attached to your account.

6. Click **Order** button or **Cancel**. Once order is selected it will show what background checks are included in the package and status.

Once Recruiter runs the background check, Checkr will take that information and email the job seeker. The job seeker will receive an email, review the information, fill out additional information and digitally sign to give approval to run the background check.
Once digitally approved by job seeker, Checkr will run the requested background check.

7. Once background check is complete, Checkr will email the Admin on the account to indicate background check results for applicant is complete. This email will provide a link to review the details.

NOTE: To get detailed results click View Results in your Checkr Dashboard.

8. The Candidates Dashboard page under Background Checks will also show new status.

NOTE: Only the user who has Checkr login credentials can login and view the results.

To run background check on applicant who does NOT have an email address in their applicant profile:

NOTE: This could occur when candidate is manually added or is a referral. Checkr requires an email address so a candidate can sign off on approval to get a background check run.

1. Click Order Background Check.

2. Popup displays stating candidate does not have an email address.

3. Enter in email address.

4. Click Order or Cancel.

5. Email address will be save to the candidate’s profile.

6. Continue to select Background Check Package.
My Jobs

Jobs Dashboard

Select Jobs from the header menu to be directed to the Jobs Dashboard. The Jobs Dashboard displays a real-time dashboard reflecting all jobs whether published, drafts, or closed.

1. Select Published Jobs, Drafts & Closed Jobs, or All Jobs to show the number of jobs currently available with details of those jobs appearing in the table below.

2. Use the Search Jobs section to expand or limit the display of information.

3. Click on the Title [ID], Location to view the Candidate Dashboard page for selected job.

4. Click the quantity displaying in the New column to view the Candidate Dashboard page for the selected job.

5. Select the ellipsis (・・・) in the "Action" column to Get Job URL, Refresh Posting Date, Edit Job, Duplicate Job, Close Job or Delete Job (only available if there are no candidates who have applied for the job).

6. Download Excel Job Reports files to get information on your applicants and hires.

7. This Week's Applicants display a weekly breakdown of where applicants are applying from.

8. Click Public Careers Page to display all job opportunities currently published. The Public Careers Page is also the URL that users will use as a link from their Corporate website.
Create a New Job Posting

As a recruiter you will need to post jobs, both to your corporate website and to job boards. Below is how you create a new job posting.

Permissions levels that have access to + Create New Job:

- HR Admins
- Recruiting Staff
- Recruiters (separate from Recruiting Staff)
- Hiring Managers

1. Select Jobs from the menu tab.

2. Click + Create New Job to launch the job creation wizard.

The job creation wizard contains five sections:

- Job Information
- Screener Questions
- Hiring Process
- Job Preview and Status
- Advertise Job

NOTE: The Advertise Job section can be turned off by going to Settings > Integrations > Job Target > Setup – Disable JobTarget Integration.

To support upcoming features, the Create Job page is a wizard type view.

Job Information

The first page of the wizard is the Job Information screen.

If you have two or more companies assigned to the same Web Recruiting module you must select which company the job is assigned to.

1. Select the company to which the job is assigned to from Company drop down. If you only have one company, or you selected a company, you can select a Position Template and Work Location from Web Pay. These are optional selections. Only a Job Title and Job Description are required to publish a job.

2. Select a position from the Position Template drop down to automatically fill in Internal Position Details, Job Title, Job Description and Job Requirements fields. If Position Template is not selected, manually enter the required fields for Job Title and Job Description.
3. Use built-in tools to edit rich text formatting to make any adjustments to the **Job Description** and **Job Requirements** sections.

   **NOTE:** Position templates are managed within Web Pay and users with appropriate permissions can navigate to Web Pay and create or edit position templates.
4. Select a pre-configured **Work Location** from the drop down menu to automatically fill in location information, or click on the Location section to manually enter in work Location Name, Address 1 & 2, City, State, and Zip. Click the expand icon to view Location details.

**NOTE:** Work Locations are managed in Web Pay. Users with the appropriate permission can navigate to Web Pay and manage work locations.

<table>
<thead>
<tr>
<th>Location</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location</strong></td>
<td></td>
</tr>
<tr>
<td>Manually enter a location, or choose a Work Location above</td>
<td></td>
</tr>
<tr>
<td>Location Name</td>
<td>Metro City Name</td>
</tr>
<tr>
<td>Address 1</td>
<td>City</td>
</tr>
<tr>
<td>Address 2</td>
<td>State</td>
</tr>
</tbody>
</table>

**City & State required for posting on Indeed**

5. Click the expand icon to view **Internal Position Details**.

6. Select an internal position template to view the internal data: **Pay Grade, Workers Compensation Code, EEO Class**, and **Supervisor Position**.

**NOTE:** These Internal Position Details are not displayed on the public posting.

7. Select or updated your cost centers from the drop down.

**NOTE:** These updates do not affect what is in Web Pay, just for the job posting.
On the bottom of the Job Information page is additional information that can be completed. These fields are visible to Recruiters, Recruiting Admin and Hiring Managers.

1. Enter **Job ID** (used only in recruiting), **Hiring Department** (used on public jobs page), **Number of available jobs** (required) and **Salary Description**, if needed.

2. Click **Next: Screener Questions** to save changes and navigate to the next step.
Screener Questions

Optionally add customized screener questions to appear on the job applications page. Responses can be viewed by the recruiting team.

1. Choose screener questions from the Select Screener drop down.

2. Click the X Remove Screener icon to remove selected screener questions.

3. Screener Preview will display how it will appear on job application once the Select Screener drop down is populated.

4. Click Next: Hiring Process to save and continue.

5. Click Previous: Job Information to return to the previous page for any necessary editing.

Hiring Process

On the Hiring Process page of the wizard, you can select your hiring workflow and designate the members of the hiring team that will be associated with the job.

1. Select pre-configured workflows from the Select Workflow drop down or Create from Default or Create From Scratch.

   NOTE: When using either Create from Default or Create from Scratch, the system will navigate to the workflow management page. Once completed, you can return to this step in the job creation wizard without losing your work.
To use a pre-existing workflow:

1. Choose a pre-configured workflow from the Select Workflow drop down.

2. **Workflow Preview** will display allowing you to verify that the workflow stages and steps are correct. Hover over the stage to see the step details.

3. Select a **Recruiter(s)** from the drop down to be associated with this job.

   NOTE: Recruiters can manage, edit and add candidates, along with being able to edit and close this job. Any users designated as a recruiter on a job, that is not part of the Recruiting Admin team or Recruiter Staff team, will only see jobs they are assigned to.

   NOTE: You can assign one or multiple Recruiters.

4. To select additional **Recruiters**, click into the field and make another selection.

5. Select a **Hiring Manager(s)** to be associated with this job by clicking into the field and making the selection.

   NOTE: Hiring Managers will have access to manage, edit and add candidates, in addition to editing and closing this job. Hiring Managers will only have access to the specific jobs that they have been assigned to.

   NOTE: You can assign one or multiple Hiring Managers.

6. To select additional **Hiring Managers**, click into the field and make another selection.

7. Select a **Team Member(s)** to be associated with this job by clicking into the field and making the selection.

   NOTE: Team Members will have access to provide feedback on candidates, but cannot edit the job. Team Members will only have access to the specific jobs that they have been assigned to.

   NOTE: You can assign one or multiple Team Members.

8. To select additional **Team Members**, click into the field and make another selection.

   NOTE: Once the job setup is complete, each of the users added to any of these roles will receive an email notification that includes instructions on how to access the job in the Web Recruiting module.

9. Click **Next: Job Preview and Status** to continue.

10. Click **Previous: Screener Questions** to return to the previous page for any necessary editing.
To Create a workflow from the default:

1. Click Create from Default. Copy of Default Workflow Preview will display allowing you to view the workflow stages and steps.

2. Enter the required Workflow Title.

3. Click the handle icon adjacent to the stage’s name and drag to desired location to re-arrange order of the stages.

4. Click the pencil icon to edit Workflow Stage and Steps.

5. Select the collapse or expand ^ icon to hide or display the steps.

6. Click Return to Job when complete to save changes and return to the Hiring Process main page.

7. Select Recruiter(s), Hiring Managers(s) and Team Member(s) as needed.

8. Click Next: Job Preview and Status to continue.

9. Click Previous: Screener Questions to return to the previous page for any necessary editing.
To Create a workflow from scratch:

1. Click **Create from Scratch**.
   
   NOTE: Workflow Preview is displayed on top of the page. As you add stages/steps the preview is updated in real time.

2. Enter **Workflow Title** (required).

3. Click **+ Add Workflow Stage** to add first stage.

4. Enter the name of the stage within the required **Stage Title** field.
   
   NOTE: Each stage should have a unique name and contain at least one step.

5. Enter name of the step within the required **Workflow Step Title** field.

6. If desired, select a template from the **Automatically Send Email Template** drop down.

7. Click **+ Add Step** to add additional steps to the stage.
   
   NOTE: An unlimited amount of steps can be added.

8. Click the **handle** icon adjacent to the step’s name and drag to desired location to re-arrange order of the steps.

9. Select the **X** icon to delete any unnecessary steps.

10. Select the **collapse or expand** ^ icon to hide or display the steps.

11. Click **Delete Stage** to remove added stage.

12. Click **Cancel** to discard changes.

13. Once stage is configured, click **Save**. Completed stage name will display along with steps within the stage.

14. Click the **handle** icon adjacent to the step’s name and drag to desired location to re-arrange order of the steps.

15. To edit or delete stage, click the **pencil** icon. Once in edit mode, click the **X** icon adjacent to the stage name to delete the stage.

16. Select the **collapse or expand** ^ icon to hide or display the steps.

17. Click **+ Add Workflow Stage** to add additional stages to workflow.
18. Click Return to Job when complete to save changes return to Hiring Process main page.

19. Click Next: Job Preview and Status to continue.

20. Click Previous: Screener Questions to return to the previous page for any necessary editing.

Job Preview and Status

If JobTarget has been disabled, the last screen of the wizard is the Job Preview and Status screen. This screen allows you to preview exactly how the job will appear on your public and internal career pages once published.

1. Review the job directly in the Preview Job Posting window or open the job application in a new tab by selecting Open Preview in New Tab.
2. Check box under Internal Position to **Make visible to internal candidates only.**

   NOTE: This will hide the job posting on the Public Careers Page and allow internal candidates to access the job posting through the Self Service Portal.

3. If no additional changes are needed, click **Publish Job** to have your job posting go live. Click **Save as Draft** to save the draft, but not publish. Click **Discard Job** to remove job and return to the **My Jobs** page.

   NOTE: Once published, the job is immediately visible on the public and/or internal career pages.

   NOTE: All published, public jobs are posted to **Indeed.com.** to opt-out visit Settings > Integrations.

4. Click **Delete Job** to remove the job posting.

5. Click **Delete** to confirm deletion on popup displayed and return to the **My Jobs** page.

6. Once published, click **Next: Advertise Job.**

7. Click **Previous: Hiring Process** to return to the previous page for any necessary editing.

### Advertise Job

When on the **Create New Job** page, after publishing a job you will have the option to post the job to over 20,000 job boards using our job distribution partner, JobTarget.

The feature includes the following options:

- Post jobs to over 20,000 Job Boards in the US.
- Free job boards require a small inventory fee.
- Pay for job boards with a credit card (if you want to be invoiced you can contact JobTarget).
- If you have a subscription with a job board, you can send us the credentials and we can link your subscription so you can post using your subscription credits.
- JobTarget also recommends job boards based on Keywords, Location and Industry.
- Analytics are provided by job board.

When creating a job there is an option to Advertise Job. After publishing your job, the **Next: Advertise Job** button will become active.
Once your Web Recruiting solution is assigned to your company, it takes about a week or two to link your account with JobTarget. You will see a page with messaging about the delay.
Once your JobTarget account is linked with your Paylocity account, the button to **Post to Job Boards with JobTarget** will become active.

When clicking the **Post to Job Boards with JobTarget**, the JobTarget website will open in a new tab. Your user information, Job Title, Job Description and Job Requirements fields will be copied to your JobTarget account.

You can search for job boards to post to using a search box for Keyword, Location and Industry. You can find many job boards that you may never have heard of but might provide great results.
Once you receive your job board results, you can add the job board to your cart. For free job boards there is a small inventory fee.
Once your job boards are selected and added to your cart, you can input your credit card to buy the job postings.
After your job has been posted for any amount of time you can click in to edit your job and see your job board analytics.
1. Click **Return to All Jobs** to navigate back to the **My Jobs** page.

2. Click **Previous: Job Preview and Status** to return to the previous page for any necessary editing.
Job Board Distribution and Posting Options

Post Jobs to my Corporate Website

Most companies that use an Applicant Tracking System (ATS) use the ATS to host their open positions on their corporate website. Below are instructions to post the branded pages.

Permissions levels that have access to View All Published Jobs:
- Service Bureau
- HR Admins
- Recruiting Staff
- Recruiters
- Hiring Managers

1. To post all your jobs to your corporate website, select Jobs on the header menu and click Public Careers Page.

2. The Public Careers Page will open in a new tab in your browser. Copy the URL for that page and send it to your IT team to add it to the Careers button on your corporate website or a ‘Search all jobs’ link on the Careers Page - however you want job seekers to get to the listing of all your published jobs.
3. Once IT adds the URL, when job seekers select that button on their corporate website they will be taken to the Jobs List page in a new tab in their browser.

NOTE: In the Self Service Portal there is a career link (Open Positions) that will take a company’s internal employees directly to their recruiting public jobs page. This needs to be configured by the HR Admin on the Portal Configuration page in order to display.

4. Once the portal is configured, users can make a job as **Make visible to internal candidates only** and publish it.

5. When your employees click the **Open Positions** link on the Career tile in the Portal, when configured, the internal and external jobs will appear on the **My Jobs** page.
When your employees click to apply to the position, the application will be pre-populated with their Web Pay personal information, saving them time when filling out the application.
Post Jobs to Job Boards

As a recruiter or HR Admin you will most likely need to post a job to a Job Board (such as Monster.com or Careerbuilder.com). Most job boards provide an option to add an ‘Apply Now’ URL. When this URL is added and applicants click the ‘Apply Now’ button they will be taken to the URL you provided.

We provide three options so you can send job seekers to All Published Jobs, Job Description or Application page. Tip: Since the job description is already on the job board, most people use the Job Application URL.

Permissions levels that have access to Share URL:
• Service Bureau
• HR Admins
• Recruiting Staff

1. From the My Jobs page click the ellipsis icon for the desired job.
2. Select the Get Job URL icon.
3. Once the Share Job screen appears, select the URL you want to use as your ‘Apply Now’ URL and click the Copy URL button.
4. Paste the URL into the job board field required.