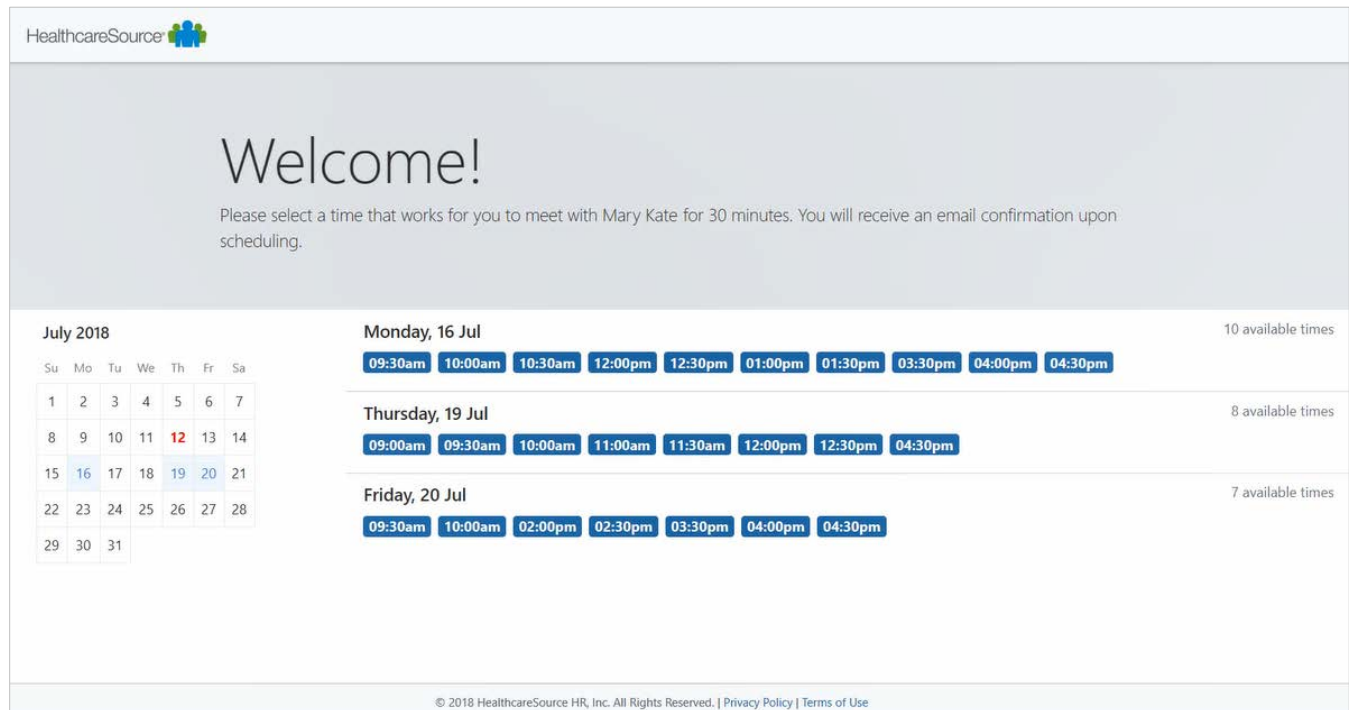



Feature Overview – Position Manager 11

Interview Self-Scheduling

Spare yourself from the tedious back-and-forth of interview coordination emails and save time for all your other to-dos by using Position Manager's Interview Self-Scheduling feature. Simply let the applicant know when you're available, they'll pick one of your pre-approved time slots, and just like that, your interview is booked.



HealthcareSource 

Welcome!

Please select a time that works for you to meet with Mary Kate for 30 minutes. You will receive an email confirmation upon scheduling.

July 2018

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Monday, 16 Jul 10 available times

09:30am 10:00am 10:30am 12:00pm 12:30pm 01:00pm 01:30pm 03:30pm 04:00pm 04:30pm

Thursday, 19 Jul 8 available times

09:00am 09:30am 10:00am 11:00am 11:30am 12:00pm 12:30pm 04:30pm

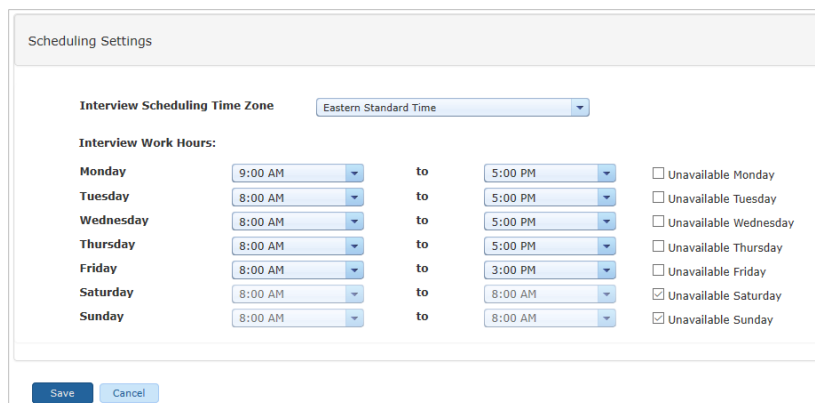
Friday, 20 Jul 7 available times

09:30am 10:00am 02:00pm 02:30pm 03:30pm 04:00pm 04:30pm

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Setting Up your Calendar

Before sending self-scheduling invitations, you may want to review your calendar settings and select the days and hours you want to be available to meet with applicants. Selecting the *Preferences* option from the user menu in the navigation bar opens the *Scheduling Settings* page. Here you can select your time zone, the days of the week you're available for interviews, and hours for each day.



Scheduling Settings

Interview Scheduling Time Zone Eastern Standard Time

Interview Work Hours:

Day	Start Time	to	End Time	Unavailable
Monday	9:00 AM	to	5:00 PM	<input type="checkbox"/> Unavailable Monday
Tuesday	8:00 AM	to	5:00 PM	<input type="checkbox"/> Unavailable Tuesday
Wednesday	8:00 AM	to	5:00 PM	<input type="checkbox"/> Unavailable Wednesday
Thursday	8:00 AM	to	5:00 PM	<input type="checkbox"/> Unavailable Thursday
Friday	8:00 AM	to	3:00 PM	<input type="checkbox"/> Unavailable Friday
Saturday	8:00 AM	to	8:00 AM	<input checked="" type="checkbox"/> Unavailable Saturday
Sunday	8:00 AM	to	8:00 AM	<input checked="" type="checkbox"/> Unavailable Sunday

Save **Cancel**

These settings work in conjunction with your corporate calendar to determine your available time slots for applicants to select when they receive an invitation.

Sending the Self-Scheduling Invitation

Selecting the *Send Self-Scheduling Invitation* option from in the **Take Action** drop-down menu on either the main *Applicants* or *Applicant Details* page opens a pop-up window with all the necessary fields to send an invitation.

The form allows you to select multiple **Attendees** to interview the applicant that are chosen from the available drop-down list. Setting the **Date Range** determines which days the applicant can select time slots from when scheduling their interview. There are also fields for determining the **Appointment Duration** and **Location** for the interview.

Selecting an email template automatically populates the **Subject** and **Body** fields for the notification that is sent to the applicant. Both fields can be edited as needed.

Once you have completed all the necessary fields on the form, selecting **Continue** finalizes the process and sends an email invitation to the applicant to schedule an interview time. After they complete the scheduling process, your calendar updates and the chosen block(s) of time are no longer selectable to other invitees.

Applicants Select a Time

Applicants schedule their own interview times after receiving the email invitation. This invitation contains a link providing access to the *Applicant Self Scheduling* page that displays a calendar showing all available dates and times that were pre-approved by selected attendees for their interview.

Upon selecting a block of time, a *Confirmation* page displays to reaffirm the

The screenshot shows a web form titled "Send Self-Scheduling Invitation". At the top right, it says "Current Status: Active - Interview". The form fields include:

- Applicant Name:** Ryan Fournier
- Update Status:** A dropdown menu set to "Active - Interview".
- Applicant:** ryan.fournier@healthcaresource.com
- Attendees:** A list box containing "Fitzhugh, Tony (CEO)" and "Incropera, Christine (Director)".
- Organizer:** Frank, Lisa
- Date Range:** 08/05/2019 to 08/09/2019
- Appointment Duration:** 2 Hours
- Location:** Woburn
- Select a Template:** Self Scheduling Interview Invitation
- Email Subject:** Invitation to Interview
- Email Body:** A rich text editor containing the text: "Hello Ryan Fournier, Thank you for your application to Zero Tolerance Office V at Pacific Heights Clinic. We are impressed by your background and would like to invite you in for an interview. Please use the link below to pick a time to meet that works with your schedule. We look forward to meeting you."

At the bottom right of the form are "Continue" and "Cancel" buttons.

The screenshot shows a "Welcome!" page for an applicant. It says: "Please select a time that works for you to meet with Mary Kate for 30 minutes. You will receive an email confirmation upon scheduling." Below this is a calendar for July 2018. The calendar shows three days with available time slots:

- Monday, 16 Jul:** 10 available times (09:30am, 10:00am, 10:30am, 12:00pm, 12:30pm, 01:00pm, 01:30pm, 03:30pm, 04:00pm, 04:30pm)
- Thursday, 19 Jul:** 8 available times (09:00am, 09:30am, 10:00am, 11:00am, 11:30am, 12:00pm, 12:30pm, 04:10pm)
- Friday, 20 Jul:** 7 available times (09:30am, 10:00am, 02:00pm, 02:30pm, 03:30pm, 04:00pm, 04:30pm)

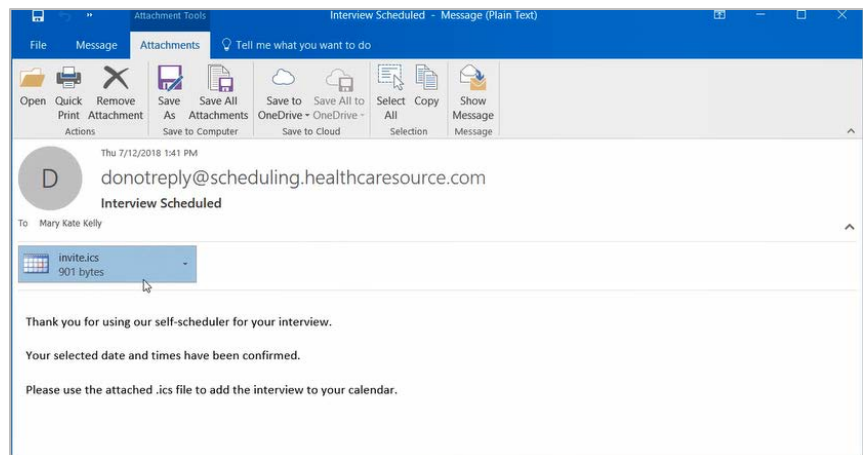
At the bottom, there is a footer: "© 2018 HealthcareSource HR, Inc. All Rights Reserved | Privacy Policy | Terms of Use"

selected date, time, and location with the applicant. Selecting **Confirm** finalizes the process by sending the details to the hiring manager and displaying a message the confirmation has been successfully sent. If needed, applicants can go back to the scheduling page to change their appointment.

Schedule Confirmation

A schedule confirmation email is sent to attendees when the applicant confirms their desired interview time. Attached to this email is an .ics file, which Outlook (or any other similar calendar app) uses to store the applicant's interview details in their calendar. After confirming these details, the time no longer displays for other applicants to schedule.

Once the interview details are saved in your own calendar, you can set up reminders, review meeting details, and work with it the same way as any other calendar appointment.



The Fine Print

Not much more here, just a few additional details to keep in mind when using this new feature.

- Permissions for this feature are granted by user role and are managed from the *User Role Detail* page accessed via the **Admin > User Roles** menu option. The **Send Self-Scheduling Invitation** permissions are located on the *User Role Detail* page, in the *Applicant Management* section under the **Position Manager** tab.
- The email address associated with an organization's system user is the address used to find the associated calendar. If you make a typo in the email address or try to use a "spoofed" address, the feature doesn't work because the system can't find a calendar using that address.
- Please contact pmsupport@healthcaresource.com if you need to update the email address associated with your organization's account.