# Reviewing Candidates in JazzHR

We've implemented an applicant tracking system that eliminates the need for creating Excel files and PDF documents, provides a secure environment for storage of candidate data and internal discussions, improves compliance with numerous federal and state laws, and makes the overall process much more efficient. Please do not share your login to JazzHR with others. If someone else needs access to the system or visibility to candidates for a specific job, contact HR to have access added.

Basic steps for reviewing candidates:
1. Review candidates resume, pre-interview, and other materials.
2. Add quick notes to the candidate's file regarding their perceived fitness, whether they should be scheduled for an interview, why they are not a good fit, etc.
3. Notify HR when you have completed your reviews.
4. For each interview conducted, either make notes on the Interview tab (if you've provided your standard interview questions to HR) or upload your handwritten notes to the documents tab.
5. As interviews are completed, make notes on the Discussions tab for HR on how to proceed with each candidate, if they should be scheduled for a 2nd interview, if they'll be offered the job, why they were not a fit if they are being rejected, etc.
6. Notify HR when reviews/interviews are complete so they can take action on the candidates.
7. Notify HR when the final decision has been made and an offer should be made to a candidate.

Detailed steps for reviewing candidates:
1. Log in to JazzHR https://app.jazz.co/.

2. On the dashboard, find the job you wish to review. Click the number under Active, then select "Department Review". The candidates in this list have met all prescreening requirements and are considered to be the strongest candidates of the ones not rejected during prescreening.
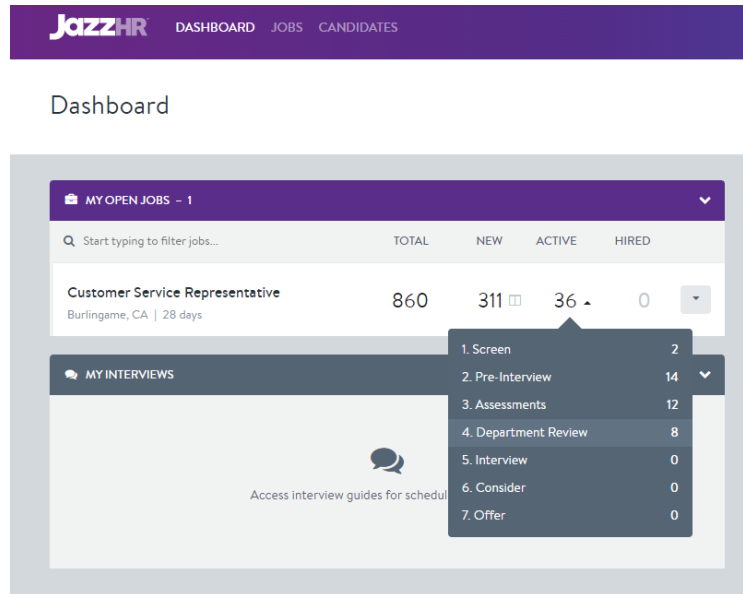
Please disregard all candidates under the New, Pre-Interview, Assessment, and Not Hired Status categories, or any other categories that may be added to the system later. These candidates are non-viable or have not completed all pre-screening requirements in order to become a viable candidate.

Candidates in the Holding status category have completed the Pre-Interview and Assessments and have not been rejected, but they have also have not been pulled forward for Department Review. This could be because there were other candidates who seemed stronger, or they completed the pre-screening requirements after the initial batch of candidates was sent to the department. Candidates in this status category can be reviewed by hiring managers if needed.

3. Click on the candidate's name to view their details.
   a) On the Profile tab, you'll find the following information:
      (1) Embedded PDF of the candidate's resume
      (2) Show button to rearrange the sections on the right sidebar
      (3) Pre-Interview completed by the candidate (click on the title to view their answers)
      (4) PDF extract of the candidate's assessment scores from TestGorilla, original resume file in .docx or .pdf form, and any other documents that have been added to the candidate's file.
      (5) Cover letter (under resume)

(6) Responses to pre-screening questions asked during the application process. Desired salary information will typically be located in this section. If salary was not captured during the application process, it may be noted on the Discussions tab.

What type of work environment do you find you thrive in?
1. One with clear direction and responsibilities with few interruptions or changes.
2. One that involves multitasking and a quick change of priorities.
3. A mixture of the two types. *

2

The regular shift for this position is typically Monday through Friday 8am-5pm Central. Are you able to work this schedule on a regular basis? *

Yes

This position sometimes requires working extended hours or weekends to accommodate peak demand? Are you able to work extended evening hours and/or weekends with advance notice, if needed?

Yes, with or without prior notice

Do you have a reliable high-speed internet connection of at least 100 mpbs?

Yes

Are you physically located in the United States (one of the 50 states or Washington DC)? *

Yes

This role is fully remote. Approximately how much experience do you have working or completing schooling using a fully remote or hybrid model? *

Between 12 months and 5 years total

If you learned about this job opening from a current employee, please provide their

—

b) Interviews tab – Click on the Launch button, confirm or enter your information, then click Start Interview to open the Interview form. If you've provided your list of questions to HR, you'll see your questions on this screen. Otherwise, you'll see a more generic form where you can add notes during or after the interview. Clicking Launch or Start Interview does not call or otherwise contact the candidate. If multiple people are involved in the interview, their notes are recorded separately.

Customer Service Representative ⤢
📍 Burlingame, CA

➕ ADD TO JOE

| PROFILE | **INTERVIEWS** | DISCUSSION | ASSESSMENTS | EMAILS | DOCUMENTS |

SCREEN

DEPARTMENT REVIEW | ADD INTERVIEW GUIDE ▼

INTERVIEW | ADD INTERVIEW GUIDE ▼

💬 CS 1st Interview

📅 Not Scheduled — Workflow Helper | ⊕ SCHEDULE

1   Customer Service Tier I   30 minutes

💬 Other Interview Feedback
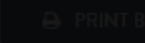
Customer Service Tier I   30 minutes   % COPY LINK   ⊕ LAUNCH

OFFER | ADD INTERVIEW GUIDE ▼

SHOW ALL WORKFLOW STAGES ❓

c) Discussions tab – You can view actions taken on the candidate's file and notes left by others who have reviewed the candidate.

Customer Service Representative ⤢
📍 Burlingame, CA

+ ADD TO JOB

| PROFILE | INTERVIEWS | **DISCUSSION** | ASSESSMENTS | EMAILS | DOCUMENTS |

💬 Discussion

> Leave a comment. Use @ to mention a team member. Use @team to notify everyone on the Hiring Team.

Leah Wright, SHRM-CP June 24, 2022

→ Moved to "Department Review"

Leah Wright, SHRM-CP June 24, 2022 Everyone

Strong answers

> Reply to this comment. Use @ to mention a team member.

Leah Wright, SHRM-CP June 24, 2022

→ Moved to "Assessments"

d) Assessments tab – You can view the candidate's Total Score on the TestGorilla assessments. This information is also visible on the TestGorilla PDF on the Profile tab. The View Details button is not currently functional for managers, but would show you the same information that is visible in the PDF, if it were functional.

Customer Service Representative ⬈
📍 Burlingame, CA

+ ADD TO JOB

| PROFILE | INTERVIEWS | DISCUSSION | **ASSESSMENTS** | EMAILS | DOCUMENTS |

▶ Criteria Corp

START A FREE TRIAL

▼ TestGorilla

✈ SEND TESTGORILLA

Customer Service

✔ Completed   Jun 24, 2022

👁 VIEW DETAILS

Total Score: 93 - Please, visit TestGorilla
for details

❶ ▶ Evaluations (0)
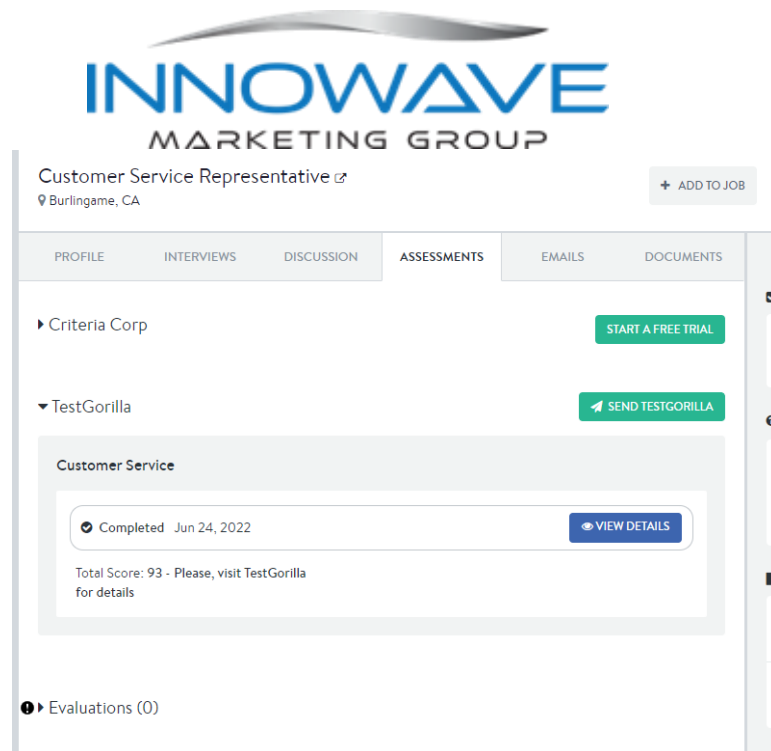
e) Emails tab – You can view all emails sent to or received from the candidate. Emails to the candidate can also be sent through this screen instead of using Outlook. Emails sent through Outlook should be uploaded to the candidate's profile in JazzHR by BCCing the email address at the bottom of the tab or forwarding the emails to the email address at the bottom of the tab.

If you would like to text with candidates, please contact HR about the possibility of adding texting to your JazzHR profile so that texts can be sent through JazzHR and attached to the candidate's profile. Texting is not automatically enabled for users.

INNOWAVE
MARKETING GROUP

Customer Service Representative ⬀
📍 Burlingame, CA

+ ADD TO JOB

| PROFILE | INTERVIEWS | DISCUSSION | ASSESSMENTS | **EMAILS** | DOCUMENTS |

✉ Emails   **+ NEW EMAIL**

TO	FROM	SUBJECT	DATE
Catherine Cremona	Innowave Marketi...	Your application has been sent to th...	Jun 24
Catherine Cremona	Leah Wright, SHR...	Customer Service Tier 1 Position	Jun 23
Catherine Cremona	Innowave Marketi...	Catherine, we've received your res...	Jun 12
Everyone	Catherine Cremona	Cover Letter	Jun 12

Candidate Email Address

If you want to store emails between you and this candidate in JazzHR, forward or BCC them to the following email address:

Candidate Email Address for Catherine Cremona:

prospect_20220612193959_OTL9KPHGQAFEY9KU@dropbox.jazz.co

f) Documents tab – You can view the same documents that are visible on the Details tab. After you've completed an interview with a candidate, scan your interview notes and upload them to this tab. Make any documents you upload visible to Everyone so they can be seen by everyone who might review the candidates. If you added your notes to the Interview tab as you conducted the interview, no uploads are necessary.

Under Federal Law, interview notes and any other documents or information pertaining to a candidate that were used in making a hiring decision must be retained by HR for a specific period of time after the position is filled. It is acceptable for your interview notes to be in shorthand or not clearly organized, but please make sure the uploaded notes pertain only to the candidate on the profile.

Customer Service Representative ☑
📍 Burlingame, CA

PROFILE	INTERVIEWS	DISCUSSION	ASSESSMENTS	EMAILS	DOCUMENTS

♀ SUBMIT FEEDBACK   **+ ADD DOCUMENT** ▾

Name	Type	Updated	Status	
TestGorilla Results ⬜ ...	📄 PDF	6/24/22	–	👁 VIEW ▾
⬜⬜⬜ ...	📄 DOCX	6/12/22	–	👁 VIEW ▾

4. After you've reviewed all of the candidate's details, please add your notes regarding the candidate to the Discussions tab. The notes could include review notes, notes to yourself or another person who will be reviewing the candidate, interview requests, rejection reasons. These notes are not visible to the candidate. Other users can be tagged in the note using @.

   a) For all candidates who are not selected to move forward, the note must include a short explanation as to why the candidate was not a fit. These notes are required by Federal Law and must not show discriminatory selection procedures. If you're unsure about whether a specific notation could be viewed as discriminatory, contact HR before entering the note.
   Examples of valid notes (not a complete list):

      (1) Please schedule first interview with Jane.
      (2) Not scheduling an interview yet, but keep file open.
      (3) Candidate does not have enough experience.
      (4) Candidate focus is wrong for role.
      (5) Stronger candidates selected to proceed.
      (6) Candidate did not show up for interview.
      (7) Candidate personality is not a fit for the role.
      (8) Candidate is not fluent in English/communication skills are not strong enough.

5. If needed, you can create and assign tasks on each candidate's profile. The task will display on the assignee's dashboard, and send a notification to the assignee, depending on their user preferences.

CREATE TASK ✕

Task

Contact candidate

Assigned To

Leah Test

Due Date (Optional)

📅 06-27-2022

Notes or Details

Please contact the candidate and determine their level of experience with developing alternate solutions when the product a client ordered is no longer available.

CANCEL   **CREATE TASK**

6. You can also assign categories to candidates as needed. Some basic categories have been set up, and HR can additional categories upon request. It is not necessary to use categories, but they can be tailored to your needs if you would like to use them.

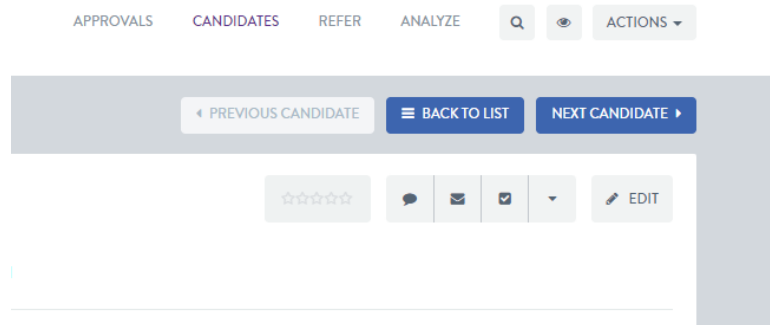SELECT CATEGORIES ✕

☐ Great Future Hire

☐ Schedule for 1st Interview

☐ Schedule for 2nd Interview

CANCEL   **MAKE SELECTION**

7. Once you've completed review of a candidate, click on Back to List or Next Candidate at the top right of the page to advance to the next candidate.

Important notes regarding the usage of JazzHR:

There are certain actions that should only be taken by Human Resources, even if your JazzHR login allows you to make them, unless explicitly approved by Human Resources. These actions could have legal considerations that HR should evaluate, or they could result in additional fees due on our account. These include:

1. Click the edit button and make changes to the candidate's profile.
2. Update the candidate's resume.
3. Send assessments.
4. Start free trials of services that integrate with JazzHR.
5. Email resumes outside of JazzHR. Please contact HR if someone needs access to the system to review candidates.
6. Add or import candidates.
7. Export candidate details.
8. Text candidates through any method other than through JazzHR.
9. Text candidates who have opted out of texting in JazzHR.