



Reviewing Candidates in JazzHR

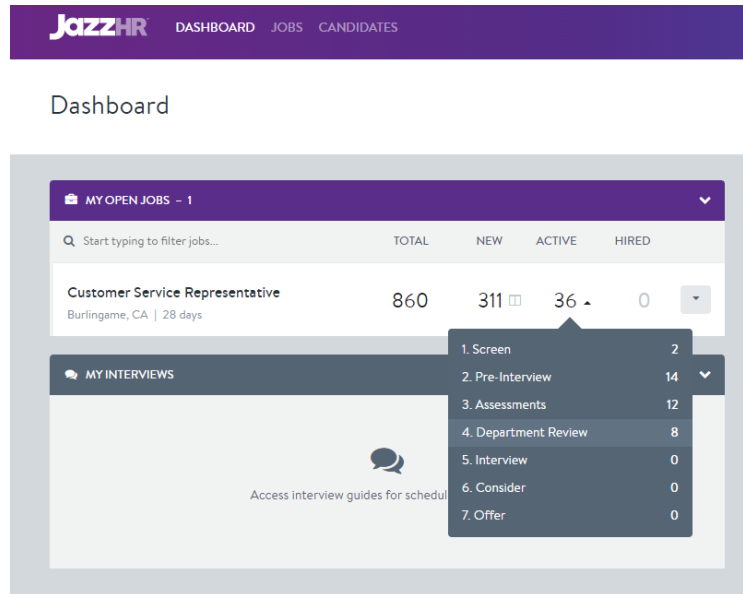
We've implemented an applicant tracking system that eliminates the need for creating Excel files and PDF documents, provides a secure environment for storage of candidate data and internal discussions, improves compliance with numerous federal and state laws, and makes the overall process much more efficient. 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.

Customer Service Representative ▾

APPROVALS CANDIDATES REFER ANALYZE Q + ACTIONS ▾

PREVIOUS CANDIDATE BACK TO LIST NEXT CANDIDATE ▾

Customer Service Representative ▾

Philadelphia, PA Burlington, CA

Customer Service Representative ▾

ADD TO JOB DEPARTMENT REVIEW

PROFILE INTERVIEWS DISCUSSION ASSESSMENTS EMAILS DOCUMENTS

Resume 1

UPDATE RESUME

Page 1 of 4

SUMMARY
Seasoned Customer and Administrative Support Professional with highly developed organizational, administrative, technical, and customer service skills. Capable of discreetly handling confidential information and effectively manage multiple priorities with specific attention to detail, while delivering results within tight deadlines. Key strengths: proactive, take-charge work style, skilled multitasker, able to work independently with little supervision, as well as with teams, with a proven reputation as the "go-to" person.

AREAS OF EXPERTISE

- Child and Payments Processing
- Database Management, Tracking & Querying
- Excellent Interpersonal Communication Skills
- Scheduling and Calendar Management
- Customer Service & Support Experience
- MS Office/365, Google Suites
- Zendesk, Intercom and Salesforce
- Type 50 WPM with 97% Accuracy
- Invoicing & Expense Reporting
- Project and Task Management

PROFESSIONAL EXPERIENCE

CONDIMENT - REMOTE 2021 - PRESENT
VIRTUAL CUSTOMER SERVICE REPRESENTATIVE
• Provide remote customer service support via phone for inbound calls to assist parents with creating prescription refills cards, scheduling and making cards and troubleshooting issues with cards and delivering insurance about the program.

INSPIRITREC - REMOTE JULY 2021 - PRESENT

Excel § Word § Outlook § Google Suites § Salesforce
Asana § Trello § Intercom § Quickbooks § Slack § Zendesk

COMMUNITY VOLUNTEER ACTIVITIES

- PAWS/PetSmart Cat Adoption (Washington Ave.)
- Alliance for Philadelphia's Animals
- Philabundance (Community Food Center, Fresh for All & Main Warehouse)
- Sunday Breakfast Rescue Mission

Cover Letter 5

Seasoned Customer and Administrative Support Professional with over 20 years of experience providing superior assistance to all levels of management and executives. I possess highly developed organizational, administrative, technical, and customer service skills! Capable of discreetly handling confidential information and effectively managing multiple priorities with specific attention to detail, while delivering results within tight deadlines. Key strengths: proactive, take-charge work style, skilled multitasker, able to work independently with little supervision, as well as with teams, with a proven reputation as the "go-to" person.

Since COVID I have been working remotely as a Virtual Assistant and Customer Service Representative in a variety of fields and industries, as well as HR coordinator and recruiting abilities. I am seeking alternative opportunities and would really desire to be employed with your organization to provide superior customer support and assist clients with their needs. Additional traits include:

- A consummate professional with a positive can-do mindset
- A reliable, responsible, and accountable team member
- Work with a sense of urgency, and are a resourceful problem solver
- Uncompromising in my ability to maintain strict confidentiality, exercise sound judgment and have the highest



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	6
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
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Other Interview Feedback

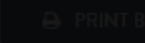
Customer Service Tier I	30 minutes	🔗 COPY LINK	🟢 LAUNCH
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OFFER ADD INTERVIEW GUIDE ▾


SHOW ALL WORKFLOW STAGES ⓘ

...good and bad service. They
...ed to talk about your spec





Kenny JazzHR 

Sample Job

 Pittsburgh, PA

...ne good customer service?

 Leah Wright, SHRM-CP

 hr@innwavemarketing.com

START INTERVIEW

The screenshot shows the JazHR interview interface. At the top, the JazHR logo is on the left, and a 'COMPLETE INTERVIEW' button is on the right. Below the logo, the candidate's name 'Kenny JazzHR' is displayed with a 'Sample Job' and location 'Pittsburgh, PA'. A 'VIEW RESUME' button is below this. To the right, the job title 'Customer Service Tier I' is shown with a 'Phone' icon and '30 mins' duration. A 'PRINT BLANK GUIDE' button is at the bottom right of this section. The main content area contains two questions: 'How would you define good customer service?' and 'What's the best customer service you've ever received? Why?'. Each question has a 'Notes...' text area and a 'SAVE' button. A 'Candidate Profile' section on the left lists contact information: '1-888-353-0887', 'kenny.jazhr@jazhr.com', and 'Pittsburgh, PA 15233'. A 'HELP & TIPS' icon with the number '6' is in the bottom left corner. On the far right, a yellow scratch pad area contains the text: 'Use this scratch pad to type your interview notes. These notes will be saved and you can review them later.'

- 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

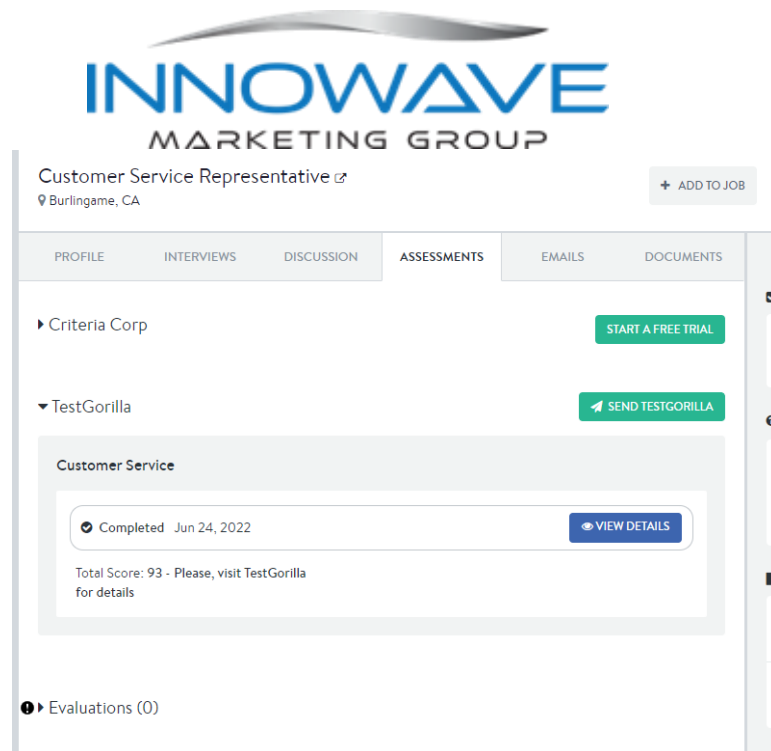
Strong answers

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.



- 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.



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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:

- 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.



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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**

- You can also assign categories to candidates as needed. Some basic categories have been set up, and HR can add 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

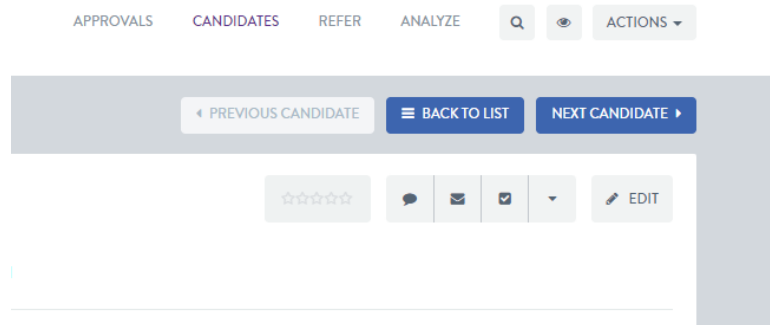
Schedule for 1st Interview

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.