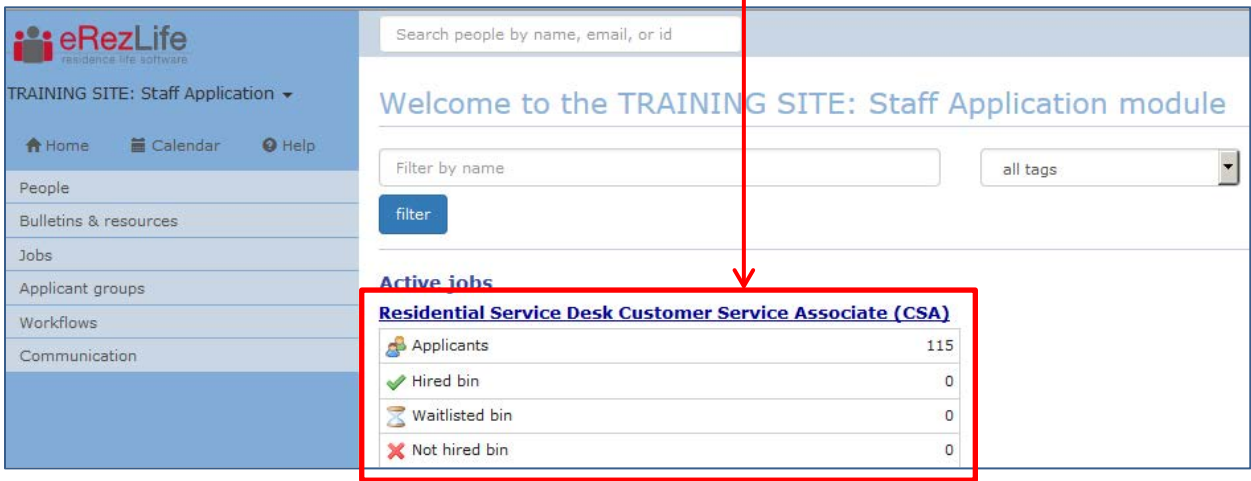


# eRezLife Search Manager Handout

Application Review	p.2	Create Interview Sessions	p.5
Email Applicants	p.3	Scoresheets	p.6
Move Applicants to Next Step	p. 4	Decisions and Offers	p.7

## Home Page

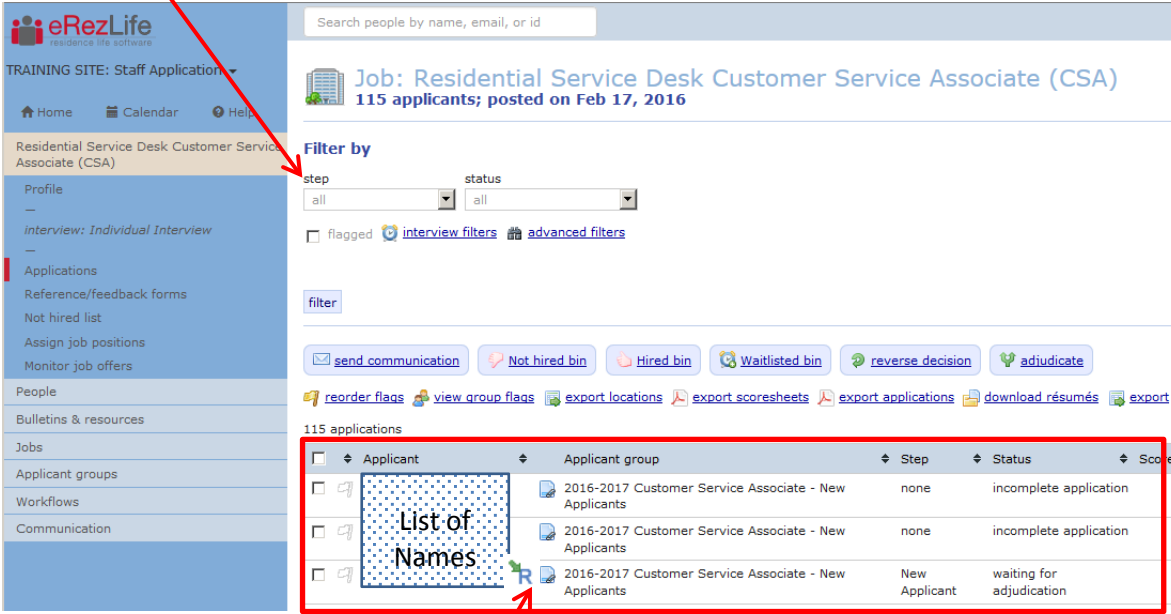
View a **snapshot** of the searches you can access. Click your **job title** to view more details.



## Job Applications Page

View each applicant's **application, step, and status.**

Use the **Filters** to view only applicants at a specific **step** or with a specific **status.**



**Steps**

- None**=application in progress
- New Applicant** = application submitted

**Status**

- Waiting for Adjudication** = ready for next step in workflow

**Review Applications** by clicking on the symbol to the right of the applicant's name.

**Review Resumes** by clicking the **R** symbol to the right of the applicant's name.

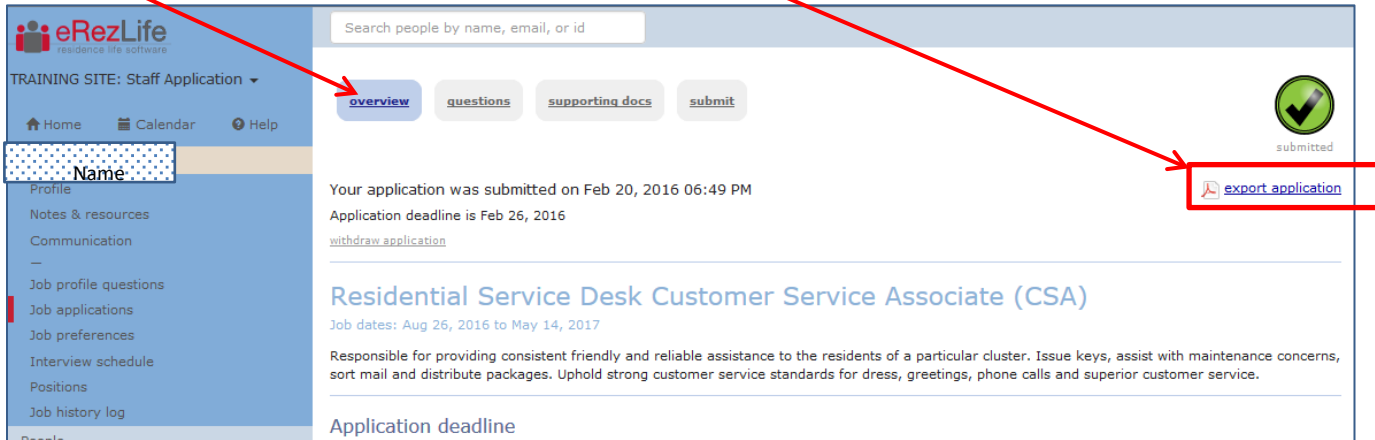
**Or** select one of the options above the list to **Export Scoresheets, Export Applications, Download Resumes, or Export** to place all in a spreadsheet.

**Communicate with Applicant(s)** by checking the  next to their name(s) and clicking

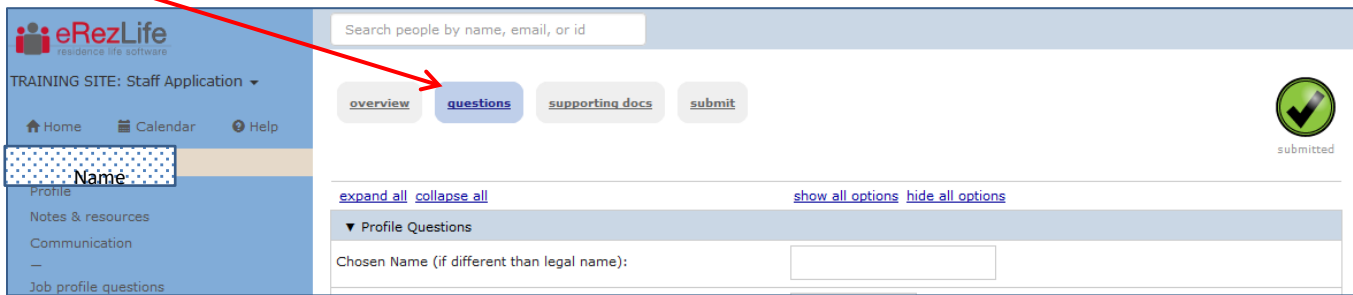
# Application Review

Each application may have several components, depending on what was asked of the applicants.

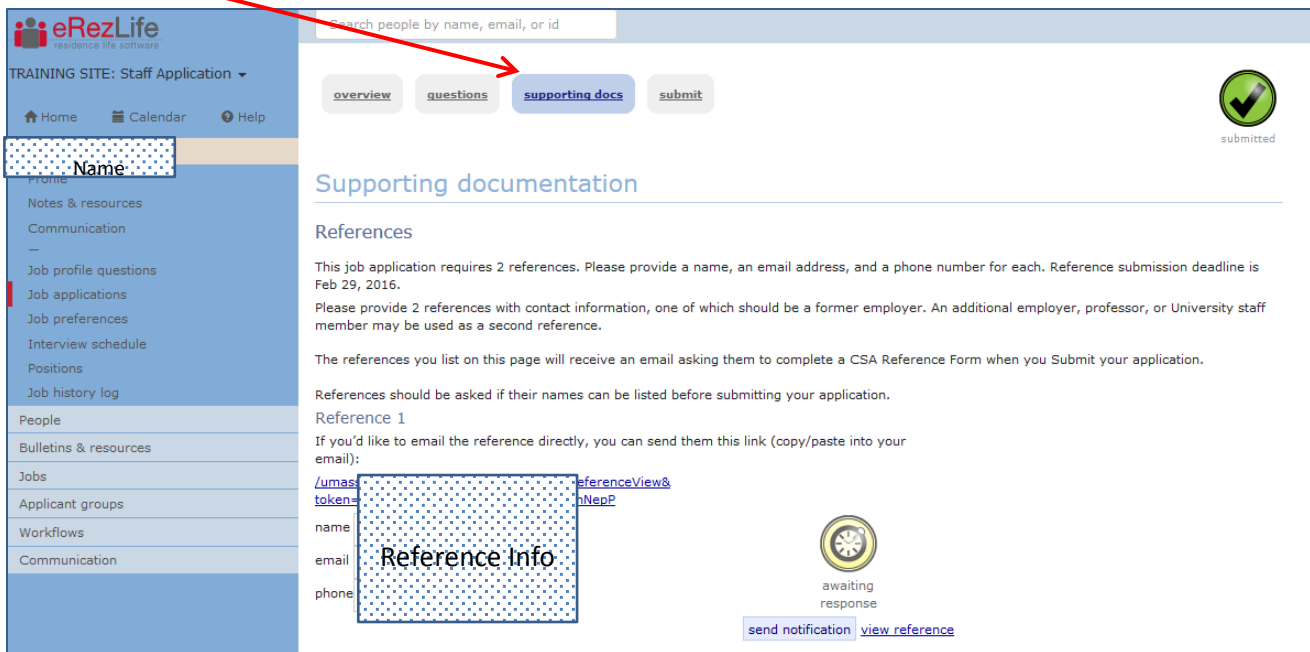
**Overview:** allows you to export a PDF version of the application.



**Questions:** review answers to questions by applicant.



**Supporting Docs:** review additional requested materials such as submitted references and uploaded resumes.



Use your browser back button or click  Home to get back to applicant list.

# Email Applicants

From the Applicant List, check the  next to the name(s) of applicants to email and click [send communication](#)

<input type="checkbox"/>	Applicant	Applicant group	Step	Status	Scores/Forms
<input checked="" type="checkbox"/>		2016-2017 Customer Service Associate - New Applicants	none	incomplete application	
<input checked="" type="checkbox"/>		2016-2017 Customer Service Associate - New Applicants	none	incomplete application	
<input type="checkbox"/>		2016-2017 Customer Service Associate - New Applicants	New Applicant	waiting for adjudication	=

In the Send Communication window:

**Communication Type**  
Email = create outgoing email  
Phone Call = log a phone interaction  
Edit the “reply-to” address if needed (e.g., change to main office email).

**Reply-to**  
Change the Reply to email address as needed.


**Template**  
Select your email template from the list.

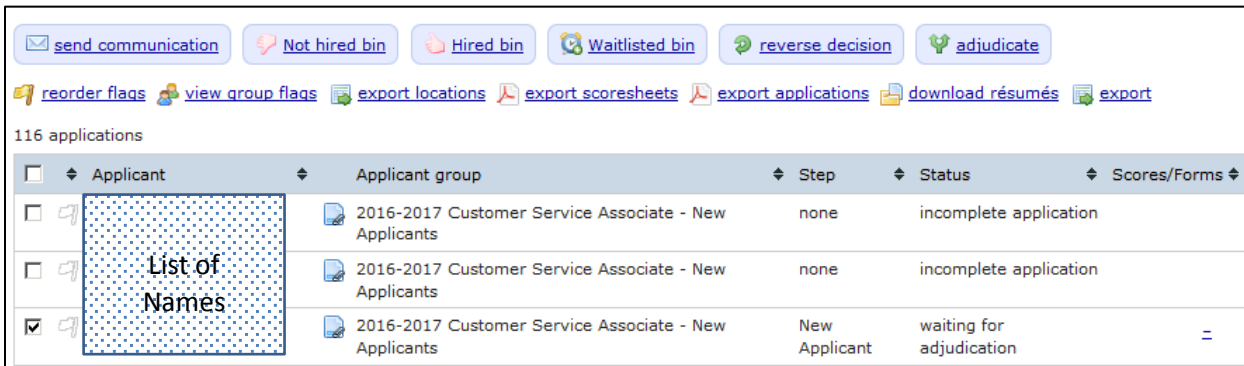
Edit your email text as needed.

Use the “**preview**” tab to see what your email will look like with the database fields pulled into the message.

Click [send and log](#) when ready to send.

## Move Applicants Forward in Process (Adjudicate)


From the Applicant List, check the  next to the name(s) of applicants to email and click 

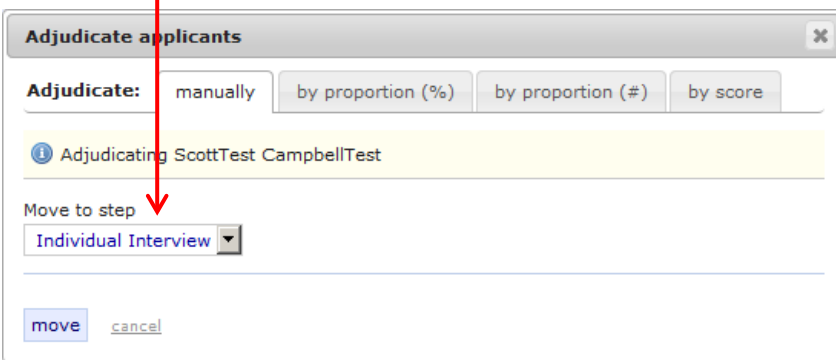


116 applications

<input type="checkbox"/>	Applicant	Applicant group	Step	Status	Scores/Forms
<input type="checkbox"/>		2016-2017 Customer Service Associate - New Applicants	none	incomplete application	
<input type="checkbox"/>		2016-2017 Customer Service Associate - New Applicants	none	incomplete application	
<input checked="" type="checkbox"/>		2016-2017 Customer Service Associate - New Applicants	New Applicant	waiting for adjudication	=

In the **Adjudicate Applicants** window, on the “manually” tab, select the step to move the applicant to in the

**Move to Step** drop down and click .





**Adjudicate applicants**

Adjudicate: manually | by proportion (%) | by proportion (#) | by score

Adjudicating ScottTest CampbellTest

Move to step  
Individual Interview

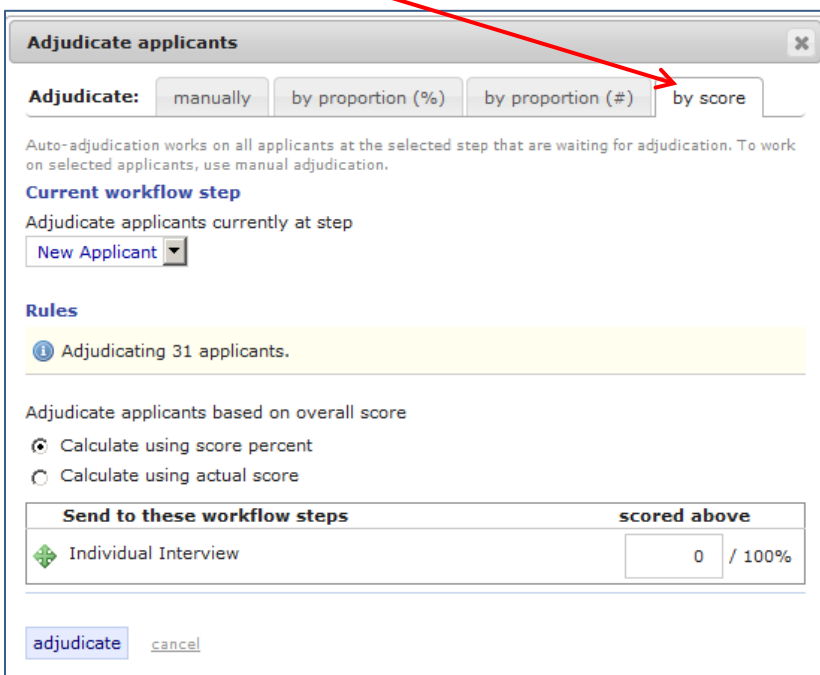
 

### Move to Step

Typically moving applicant either:

- To next step in workflow
- Back to a previous step in the workflow.

You can also use the “**by score**” tab to move everyone with a specific evaluation score to the next step.



**Adjudicate applicants**


Adjudicate: manually | by proportion (%) | by proportion (#) | **by score**

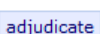

Auto-adjudication works on all applicants at the selected step that are waiting for adjudication. To work on selected applicants, use manual adjudication.

**Current workflow step**  
Adjudicate applicants currently at step  
New Applicant

**Rules**  
Adjudicating 31 applicants.

Adjudicate applicants based on overall score  
 Calculate using score percent  
 Calculate using actual score

Send to these workflow steps	scored above
 Individual Interview	0 / 100%

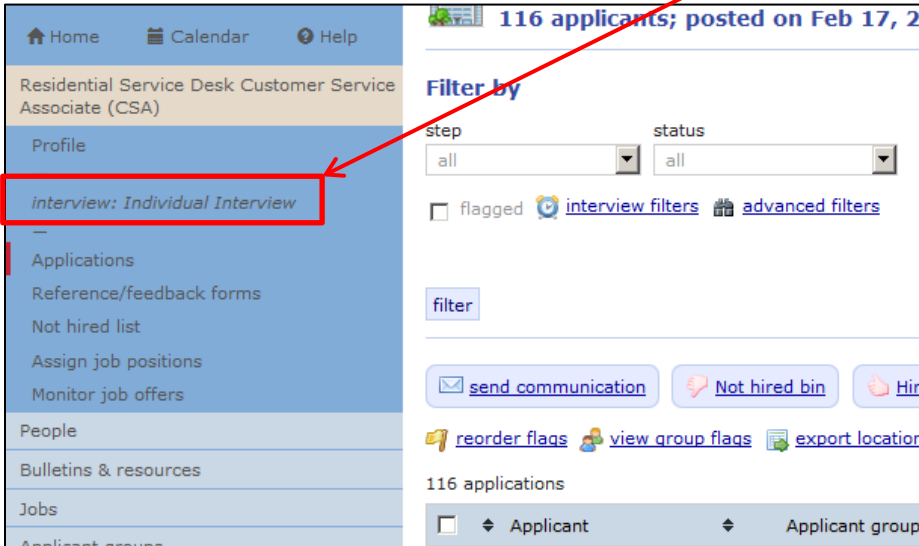
### NOTE

Once you move an applicant to an interview workflow step, the applicant will see an option to “Schedule an Interview” on their home screen.

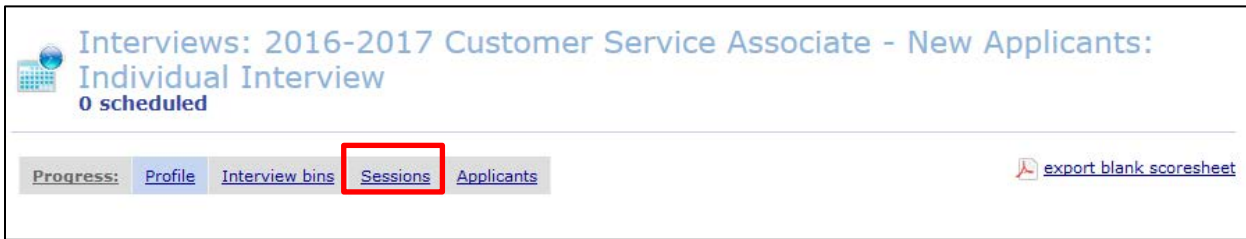
**Make sure you have added interview session times BEFORE moving applicants to a scheduling step.**

# Creating Interview Session Times in eRezLife

When looking at the Applicant List for your job, click the **Interview** step in the left hand navigation menu.

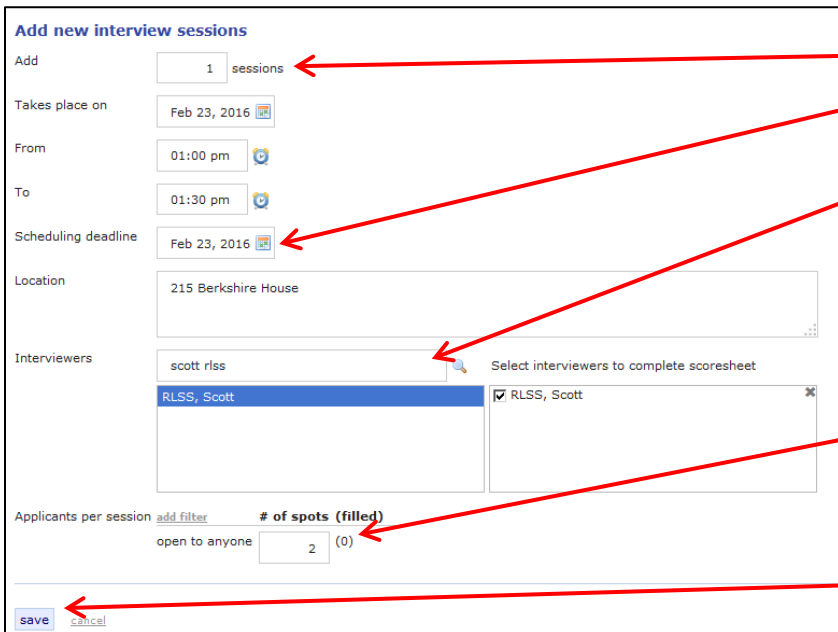


Click the “Sessions” tab to create new interview sessions.



At the bottom of the page, click [+ add sessions](#) to add one session at a time or [+ import sessions](#) to upload an entire spreadsheet worth of interview times all at once.

## Add Session



**Add** = number of sessions being added

**Scheduling Deadline** = last date an applicant can sign up for this session.

**Interviewers**

Type name and click to find.

Click staff name in left side box to include in right side box if the staff person will be completing a scoresheet for the interview.

**Applicants Per Session** = number of applicants that can attend the interview session.

Click [save](#)

## Score an Applicant (on Application Review or Interview)

When an applicant reaches a Workflow Step that has an evaluation/rating form, there will be a **link to the evaluation/rating form** in the **Step** column of the Applicant list with a **Status** of **pending**.

Applicant	Applicant group	Step	Status	Scores/Forms
<a href="#">CampbellTest, ScottTest</a>	2016-2017 Customer Service Associate - New Applicants	<a href="#">Individual Interview</a>	pending interview	=

For the Interviewer, **Upcoming Interviews** and **Interview Scoresheets** will show up on the **Home** page.

Applicant	Scoresheet	Interview date	Interview time
<a href="#">CampbellTest, ScottTest</a>	<a href="#">Individual Interview</a>	Feb 23, 2016	1:00 PM-1:30 PM

Date	Time	Location	Interviewers	Applicants
Feb 23, 2016	1:00 PM-1:30 PM	215 Berkshire House	RLSS, Scott	<a href="#">CampbellTest, ScottTest</a>

They can click the link for the provided **Scoresheet** to **submit their evaluation**.

This option will disappear once the scoresheet has been submitted.

## View Scoring Information

Once scoresheets are submitted, scores will show up on the applicant list in the **Scores/Forms** column.

Applicant	Applicant group	Step	Status	Scores/Forms
<a href="#">CampbellTest, ScottTest</a>	2016-2017 Customer Service Associate - New Applicants	<a href="#">Individual Interview</a>	waiting for adjudication	100

In addition, the applicant **Status** will change from **Pending Interview** to **Waiting for Adjudication**.

## Making Decisions and Offers

### Select Applicants to Hire, Not Hire, and Waitlist.

On the list of applicants, check those you want to act on and choose the appropriate **bin**.

The screenshot shows a toolbar with several action buttons: 'send communication', 'Not hired bin', 'Hired bin', 'Waitlisted bin', 'reverse decision', and 'adiudicate'. A red box highlights the 'Not hired bin', 'Hired bin', and 'Waitlisted bin' buttons, with a red arrow pointing to the 'Waitlisted bin' button. Below the toolbar, there are links for 'reorder flags', 'view group flags', 'export locations', 'export scoresheets', 'export applications', 'download résumés', and 'export'. A table below shows 116 applications with columns for Applicant, Applicant group, Step, Status, and Scores/Forms. The first row shows 'CampbellTest, ScottTest' in the '2016-2017 Customer Service Associate - New Applicants' group, with the step 'Individual Interview' and status 'waiting for adjudication'.

FOR THE CSA PROCESS, AND OTHERS WITH LOCATION ASSIGNMENT TO BE CONSIDERED, THIS ACTION WILL NOT NOTIFY THE APPLICANT.

### Assign Applicants to Locations (if needed)

From the Application List page, click **Assign job positions** in the left hand navigation menu.

The screenshot shows a navigation menu with options: Home, Calendar, Help, Residential Service Desk Customer Service Associate (CSA), Profile, interview: Individual Interview, Applications, Reference/feedback forms, Not hired list, **Assign job positions** (highlighted with a red box), and Monitor job offers.

On the Assign Job Positions page, **drag the applicants names** from the left column **into the position/location you want to place them**. You can move them around until you have made your final decision.

The screenshot shows the 'Assign Job Positions' page for the 'Residential Service Desk Customer Service Associate (CSA)' position. It features an 'Auto-assign' section and two main panels: 'Unassigned' and 'Assigned'. The 'Unassigned' panel shows a list of applicants: 'CampbellTest, ScottTest' and 'Scotticus, Umass'. The 'Assigned' panel shows three positions: 'CSA - Baker', 'CSA - Brett', and 'CSA - Cashin', each with '1 of 1 positions available' and an 'extend offers' link. A second 'Unassigned' panel at the bottom shows 'Scotticus, Umass' and an 'Assigned' panel showing 'CSA - Baker' with '0 of 1 positions available' and 'CampbellTest, ScottTest in consideration'. Red arrows indicate the movement of applicants from the top 'Unassigned' panel to the bottom 'Assigned' panel.

Once complete, click the **extend offers** option inside the position/location category.

## Extend Offers

On the extend offers page, **select the applicants** to whom you would like to extend an offer.

Job: Residential Service Desk Customer Service Associate (CSA)  
116 applicants; posted on Feb 17, 2016

- filter applicant group - [filter]

<input type="checkbox"/>	Applicant	Applicant group	Offer sent	Offer expires
<input checked="" type="checkbox"/>	CampbellTest, ScottTest	2016-2017 Customer Service Associate - New Applicants	Feb 23, 2016 1:27 PM	

**Offer expirations**

2016-2017 Customer Service Associate - New Applicants \* [Apr 04, 2016]

[extend offer] [extend offer & send communication]

Set the **offer expiration date** (the date by which the applicant must respond to keep the offer).

Click either

**extend offer**

= allows applicant to see offer on home page, but no email is sent.

or **extend offer & send communication** = allows you to choose from email templates or create a new email (see email applicants section of handout).

## Monitoring Job Offers

From the Application List page, click **Monitor job offers** in the left hand navigation menu.

Home Calendar Help

Residential Service Desk Customer Service Associate (CSA)

- Profile
- interview: Individual Interview
- Applications
- Reference/feedback forms
- Not hired list
- Assign job positions
- Monitor job offers**

**export offers**

Offers pending		2
Name	Location	Offer sent
CampbellTest, ScottTest	CSA - Baker	Feb 23, 2016
Scotticus, Umass	CSA - Brett	Feb 23, 2016

Accepted offers 0

Declined offers 0

Expired offers 0

Off-boarded 0

**Waitlisted bin**

Offers pending	0
Accepted offers	0
Declined offers	0
Expired offers	0