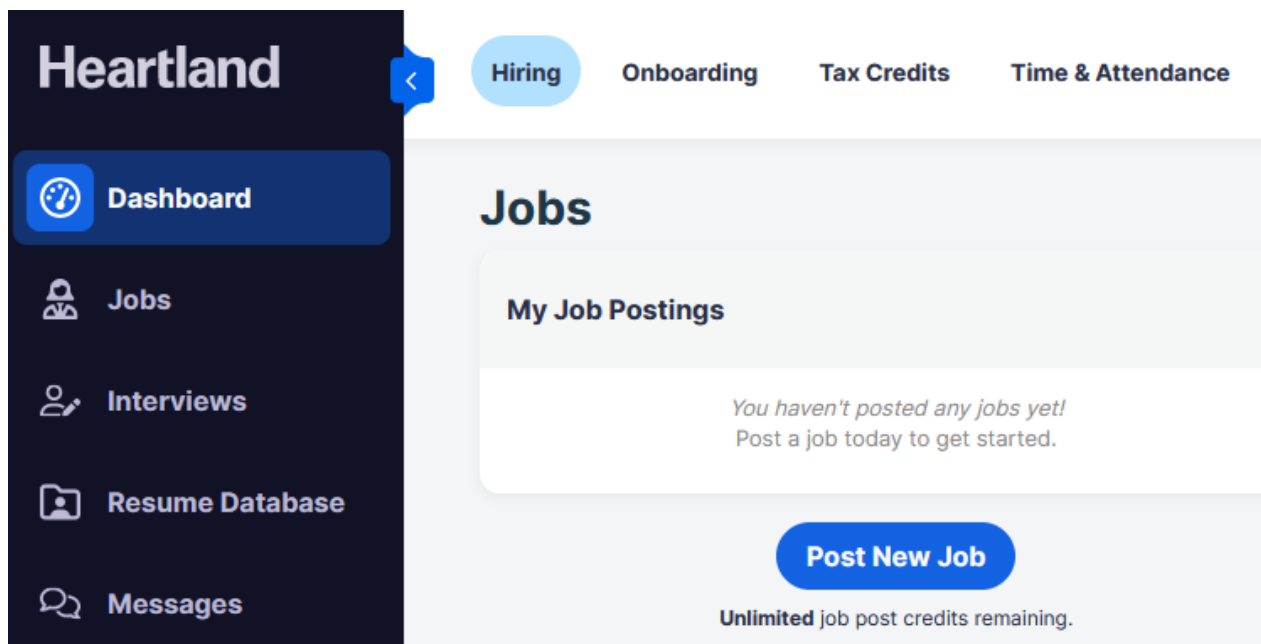


Hiring Quick Start Guide

Dashboard

When you log in to the site, you will see the dashboard. If you are not already on this tab, select **Hiring** from the menu on the top of the page.



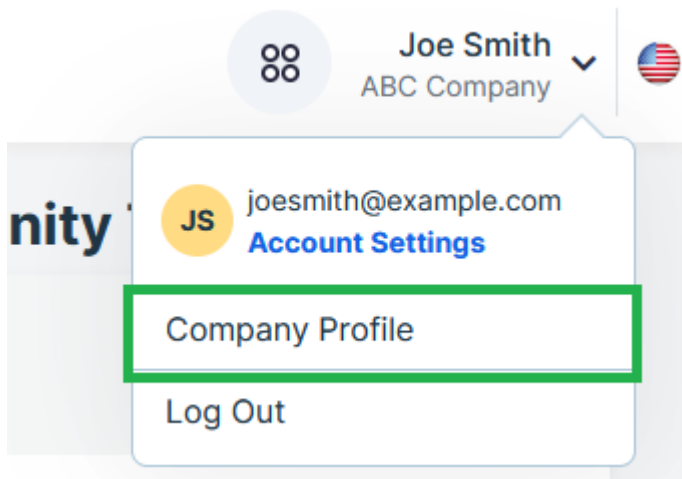
Here you can see a high-level overview of what you need to recruit and hire new employees.

To get started, complete the following steps in order.

Company Profile

First you will need to set up your company profile.

- 1) At the top right corner of the page, select the down arrow next to your user name, and then select **Company Profile**.



The Company Profile Information page opens.

A screenshot of the "Company Profile Information" page in the Heartland system. The left sidebar shows navigation options: "Company Profile" (selected), "Administrators / Team", "WOTC", "T&A SETUP", and "Billing" (with a sub-menu for "Billing Profile" and "Billing History"). The main content area has a header "Company Profile Information" and a form with the following fields:

- Company Id: 14531
- Company Name*: ABC Company (with a red "..." icon)
- Primary Line of Business*: Administrative/Office (with a dropdown arrow)
- Business Entity Type: Corporation (with a dropdown arrow)
- Website: @ (with a red "..." icon)
- Address: 1234 Test st
- An empty text input field.

- 2) Complete the required fields (indicated with an asterisk).

Tip: Complete as many of the social media fields (Twitter, Facebook, Instagram, LinkedIn) as possible, as this can help your job posts reach more candidates.

- 3) Select **Upload Logo** and then locate and select the company logo to upload.



Upload Logo

For best results when sharing on LinkedIn, Facebook and Twitter, please upload an image of dimensions 1200 x 628 pixels (width x height).

- 4) Select **Save**.

LinkedIn

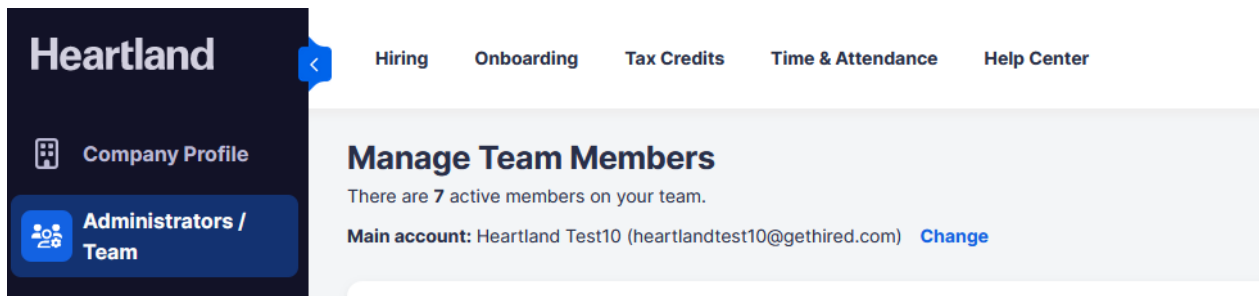


ABC Company

Cancel

Save

- 5) If you want to enable additional administrators or users to access your account:
 1. **Select Administrators/Team** to open the Manage Team Members page.



2. For each member you want to add and set privileges for, select Add Team Member to open the Add Team Member box, then enter the team member's details, and then select Add Member.

Add Team Member ✕

Complete the form below to create a new employer account that has the ability to post and manage onboarding on behalf of your company.
Note: A welcome email and login instructions will be emailed to the email address provided below.

First Name

Last Name

Email

Phone

This team member can download candidate's application form.

This team member can do onboarding.

This team member can do WOTC

- Sign POA
- Submit WOTC Order
- View Open Cases
- View Reports
- View Potential Tax Credits

Application Forms

To create an application form:

- 1) From the top menu, select **Hiring**, and then select **Administration - Application Forms** from the menu on the left.

Heartland

Hiring Onboarding Tax Credits Time & Attendance Help Center

Dashboard
Jobs
Interviews
Resume Database
Messages
Administration ▾
Application Forms
Candidate Actions
Careers Page
Customize Email Branding
EEO/OFCCP
Email Templates
Integrations

Application Forms Configuration

A job application lets you ask standardized questions to job seekers. Application responses will be available as a downloadable PDF in the applicant's profile (optional). You can also add pre- screening questions when you create your job post.

Application Builder On Off

Receive applicants with incomplete job application On Off

Name	Status	Action
Application Form	Active	✎
Application Form - COPY	Draft	✎
Job Form	Active	✎
Job Form - COPY	Draft	✎
New Form	Draft	✎
Sample Application Form	Draft	✎
Test Form 08/08	Draft	✎

[Manage Forms](#)

- 2) Create an application form either by copying an existing form or using the **Manage Forms** button:

Copy an existing form: From the forms listed, locate the one you want to copy, and then select its edit icon [✎](#) to open its editing page.

Manage Forms: Select this option to open the to open the Application forms page, and then:

1. Select Add New Form to open the Add New Form box.
 2. Enter your new form name, and then select Continue to open the new form's editing page.
- 3) Update or complete the required fields (indicated with an asterisk), and drag and drop form elements from the left side of the page into the form editing area.

Tip: Use one or two knockout questions that can quickly filter out unsuitable candidates and identify those that are qualified for the job.

4) As you build and complete your form, use the options at the bottom of the page:

Preview

Save As Draft (if the form Status is Draft)







Publish Form

Offer Letters

To create an offer letter:


1) From the main menu, select Hiring, and then select **Administration - Offer Letters**.

The screenshot shows the Heartland HR system interface. The sidebar menu on the left has 'Offer Letters' highlighted. The top navigation bar shows 'Hiring' selected. The main content area displays the 'Offer Letters' page with a table of offer letters and an 'Add New Template' button.

Name	Created By	Status	Actions
Default Offer	System	Draft	  
Default Offer	System	Active	  

2) Create an offer letter by selecting either:

The **Add New Template** option to create an offer letter from scratch.

An existing letter's copy icon  to copy and then edit and publish it as a new letter.

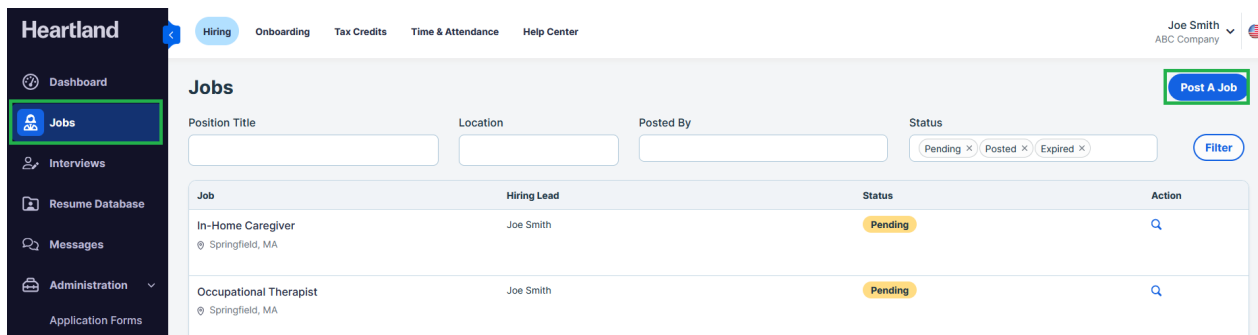
Job Posts

At the Jobs page, you can create and manage pending and active job posts, reassign posts to different admin users, and close out posts to remove them from all job sites.

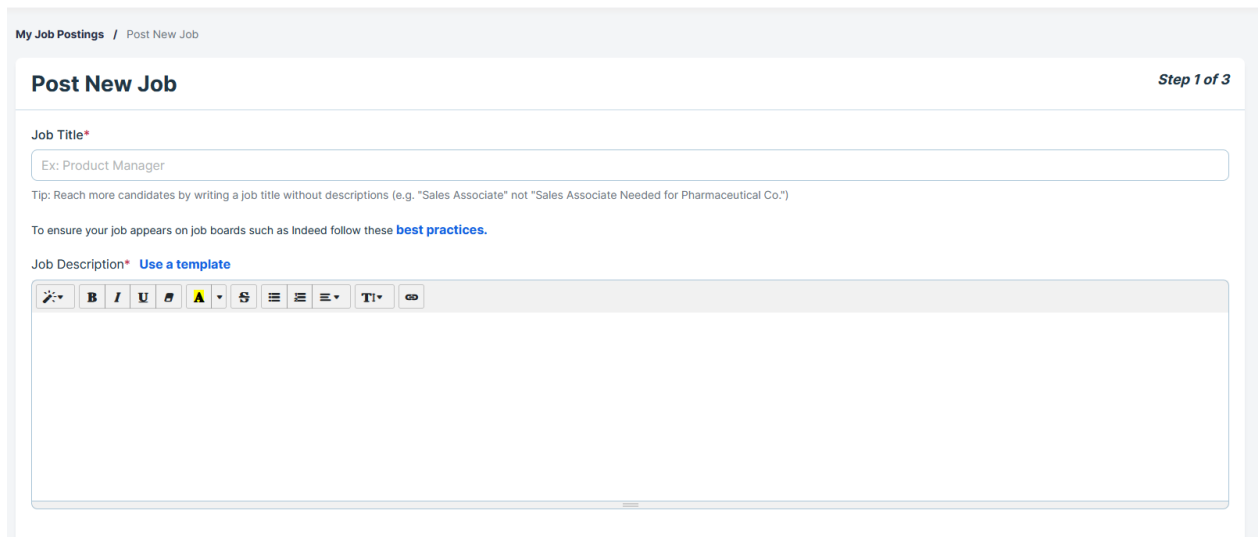
Note: A job post remains active for 30 days (unless it is closed out earlier), after which you can reactivate or repost it. Reposting a job might yield more applications than reactivating it, as the job board processes a reposted job as a new post.

To create a job post:

- 1) From the main **Hiring** menu, select **Jobs**, and then select **Post A Job**.



The **My Job Postings / Post New Job** page opens.



- 2) Complete the job information on each of the three step pages:

Step 1 of 3: Enter information regarding the position, the more the better.

Step 2 of 3: Select any existing or enter new pre-screening questions, and then select the option to allow candidates to answer via **Video (via Webcam)**, **Audio (via Phone)**, **Written Answer**, or **Multiple Choice**.

Step 3 of 3: Review your post, and if everything looks good, select **Publish This Job Post** to syndicate your job post to Indeed, Facebook Jobs, and more.

Interviews

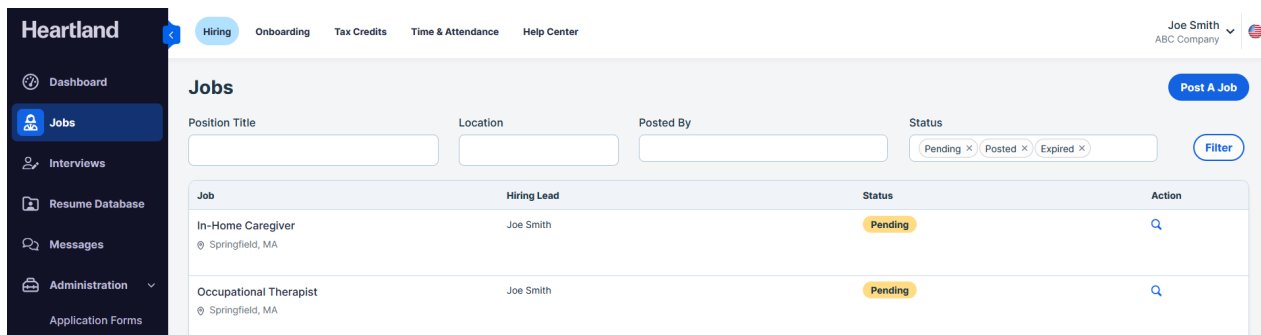
Set up interviews at the Jobs page, and manage interviews at the Interviews page.

Interview Setup

To set up an interview:

- 1) From the **Hiring** menu select **Jobs**.

The Jobs page opens.



- 2) From the jobs listed, locate the one you want to set up an interview for, and then in the **Action** column, select the view icon 🔍 to open the Jobs page for that job.

- 3) From the Applicant Tracker column on the left, select the applicant for whom you wish to schedule an interview to display their details.

The screenshot shows the Applicant Tracker interface. On the left, there is a list of applicants for the 'Kitchen Manager' position in Fontana, CA. The applicants are categorized by status: New (3), Promising (0), Maybe (1), Offer (0), Hired (0), and Declined (0). John Smith is highlighted in the list. On the right, the detailed view for John Smith is shown, including his profile picture (JS), name, location (Fontana, CA), and email (jsmith@example.com). A dropdown menu is open below the name, with 'Schedule Interview' selected. Below this, there is a 'Status' section with buttons for New, Promising, Maybe, Offer, Hired, and Declined. A 'Schedule Interview' modal is open, containing the following questions and options:

1. What type of interview would you like to schedule?
 - Virtual
 - Phone
 - In-person
2. How long should interview be scheduled for?
 - 30 min.
3. Review your schedule and add additional times if needed:
 - Date: [] 8 am [v] :00 [v] to 9 am [v] :00 [v] +

At the bottom of the modal, there are two buttons: 'Send Interview Request' and 'Cancel'.

- 4) Select Schedule Interview from the dropdown on the right just below their name.

The Schedule Interview panel opens.

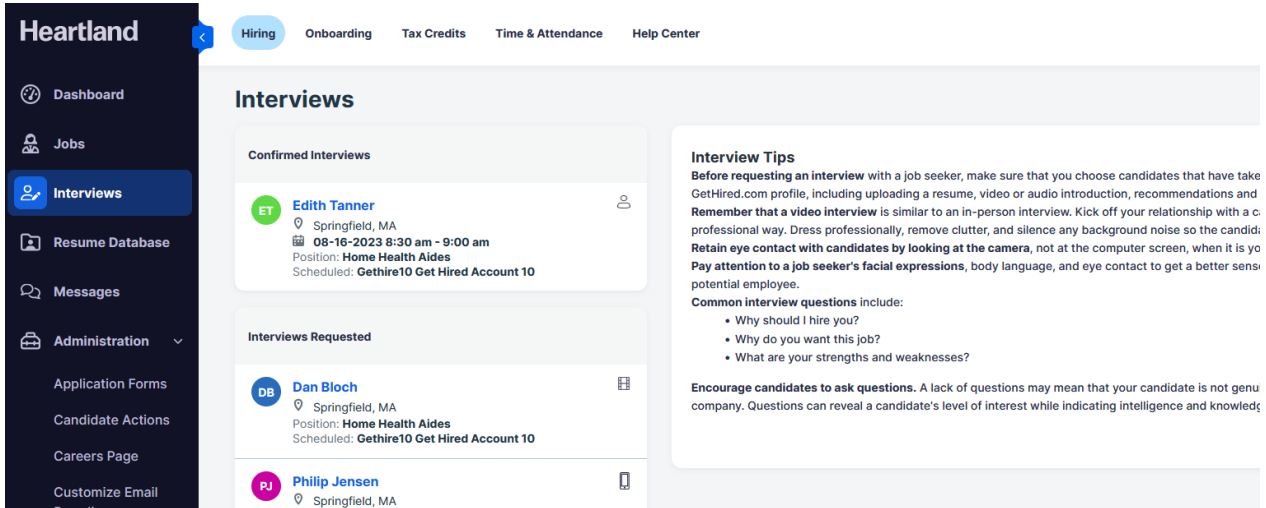
- 5) Complete the interview schedule details, and then select Send Interview Request to email the request to the applicant.

Once the applicant has responded to the request and selected their preferred date and time, you will receive an email confirming the interview, which you can sync with many calendar applications.

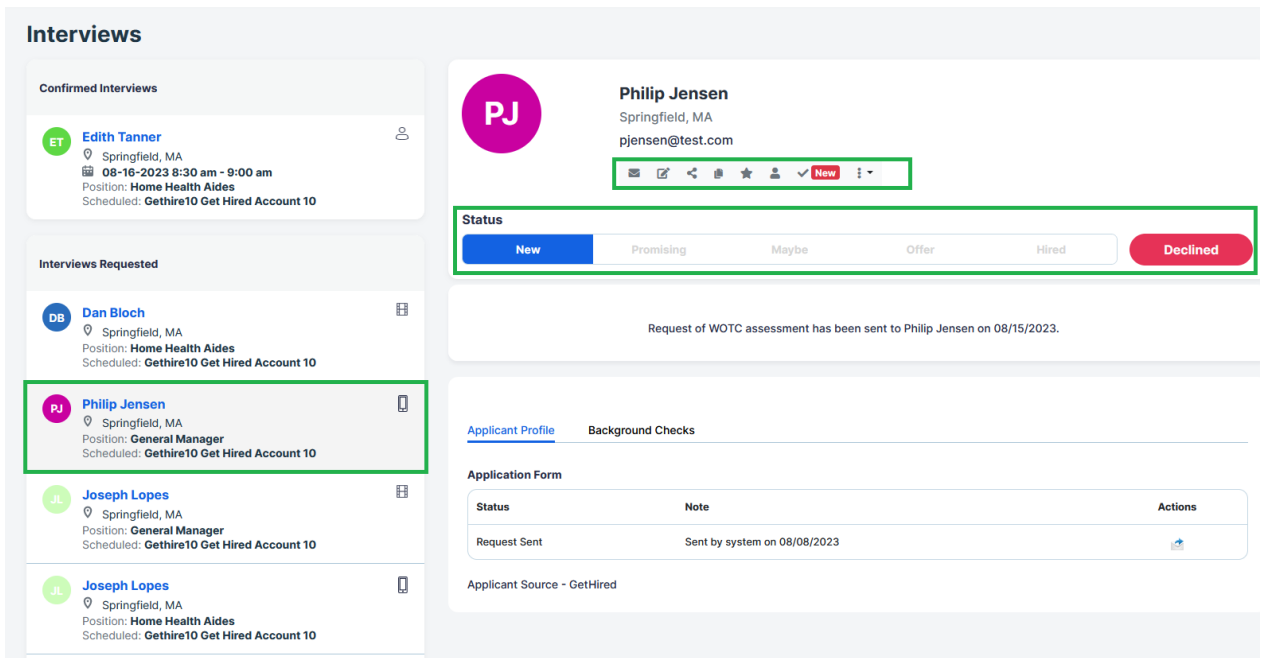
Manage Candidates and Schedule Interviews

At the Interviews page, you can manage all interviews.

- 1) From the **Hiring** menu, select **Interviews**.



2) From the interviews listed, select the one you want to view or manage.



3) Select the required option for the interview:

Add Notes: This becomes **View Notes** once a note is added to the interview.

Message Candidate: Send an email or text message directly to the candidate.

Note: Additional rates apply to opt-in for text messaging.

Schedule: This becomes **Reschedule** once the interview is scheduled.

View Resume: If available, this displays the candidate's resume as PDF.

Cancel Interview: If available, this enables you to cancel a scheduled interview and select a reason.

Share Candidate: Share the candidate's application with a colleague.

Rate Candidate: Apply 1-5 star ratings to the candidate for **Aptitude**, **Experience**, **Pre-screening response**, and **Overall Assessment**.

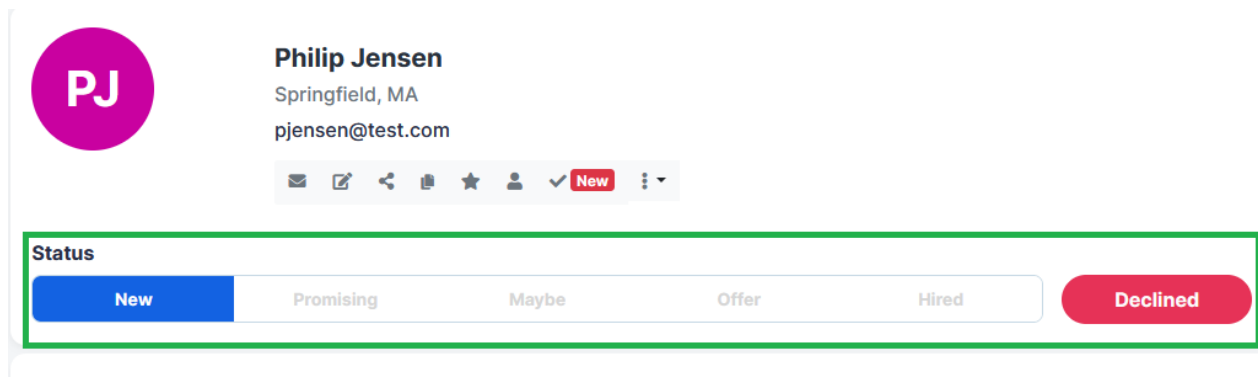
Copy/Move: Copy or move the candidate to another open position.

Begin Interview: Begin the interview process during which you can rate the candidate, make notes, and then end the interview.

4) Update the **Status** as required.

Applicant Status

When you are ready to take action with an applicant, update their **Status**.



Typical **Status** options you might select include:

- **Offer:** Opens the **Send Offer Letter** box where you can select an existing offer letter, complete the offer details, and then send it to the applicant.
- **Hire:** Opens the **Onboarding Request** box prompting you to verify whether to send an onboarding request to the applicant. If you select **Yes**, the Add Employee page opens prompting you to select an existing onboarding package (created in the Onboarding module) to send to the applicant.
- **Decline:** Reveals the **Candidate Decline Reason** details, where you can select or enter a reason to decline the applicant, and then select **Decline Candidate**.