

Understanding the Submission Process

The *Submission* process is a series of variable steps to identify, evaluate and select a candidate for the Job. If no selection steps are need, Placements can be created directly.

In Bullhorn, the *Submission* steps are customized for your environment. However, there are core concepts that apply. This document uses core steps as the process example. While the names and number of steps in your local process may vary, the Submission process operates the same as described here.

The core *Submission* process options include:

- **Submit Candidate:** Ties the Candidate and Job together. This step may or may not include an internal review process.
- **Client Submission:** Candidate is put in front of Client for review and selection. This step may include one or more people at the client
- **Interview:** This step can include one or more client interviews

Filling the job may utilize any or none of these steps and can start at any point depending on agency process, type of job and client requirements. Each candidate associated to a job is ultimately Rejected for the position or placed on assignment (Placement)

Note: Because the screens and Workflow can be customized, screens may vary from those shown in this document

Submissions and Entities

The core Submission process displays as **Workflow Breadcrumbs** visible on the Job and can display on Company, Contact, and Candidate entities. Submissions can be made from and be managed from any of the entities, but typically the Submission process is managed from the Job or Candidate or the **Submissions** List View.

- **Manage the Submission from the Job or Candidate *Submission* tab.** Use the *Submissions Status* field to move through the process. The *Submissions Status* field is used note status with the stage, move to the next stage and track progress

ID	STATUS	ORDER TYPE	JOB TITLE	# OF OPENINGS	OPEN/CLOSED
3620	Active	Contract	New Test Job 1	1	Open

Candidate	Date Added	Date Last Modified	Status	Added By
Candidate Sample	08/14/2020 9:22 PM	08/14/2020 9:29 PM	Interview Scheduled	Nicole Graf-Training

Candidate	Date Sent	Sender	Contact	Email	Num Times Read
Candidate Sample	08/14/2020 9:27 PM	Nicole Graf-Training	Chris Stael		0

In this example, there is one Submission on the Job. The **Status** field options include four statuses (can be set manually) and the **Move To** options, which advance the Submission to various stages. This Submission has advanced to the Client Submission stage:

- Submission box **Status** = Client Submission
- Client Submission box indicates (1) Submission in the stage of Client Submission
- If this Submission advances to Interview, the Submission Status field changes and the Interview Appointment box increments to (1)

The screenshot shows the 'Chair Assembly' job page. The 'SUBMISSIONS (1)' tab is active. A table lists one submission: 'Stacy Testing' with a status of 'Client Submission'. A dropdown menu is open over the 'Client Submission' status, showing 'CHANGE STATUS' options (Internally Submitted, Candidate Interested, Client Feedback, Interview Feedback) and 'MOVE TO' options (Client Submission, Interviewing, Rejected, Confirmed, Placement). A yellow box highlights the 'Submission (1)' link, and another yellow box highlights the dropdown menu. A yellow arrow points from the 'Client Submission' status in the table to the 'Client Submission (1)' breadcrumb link below the table.

The **Workflow Breadcrumbs** on Job, Candidate, Contact and Company visually indicate if there are any Submissions and if any have moved to other stages. The Breadcrumbs can also be used to initiate or view various stages of the submission process.

The screenshot shows the 'Onboarding Coordinator' job page. The 'SUBMISSIONS (2)' tab is active. A breadcrumb trail is visible at the bottom: 'Submissions (2)' (highlighted with a red arrow), 'Client Submissions (2)', 'Interview (1)', 'Offer Extended', and 'Placement'. The 'Job Description' and 'Details' tabs are also visible.

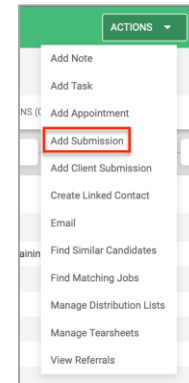
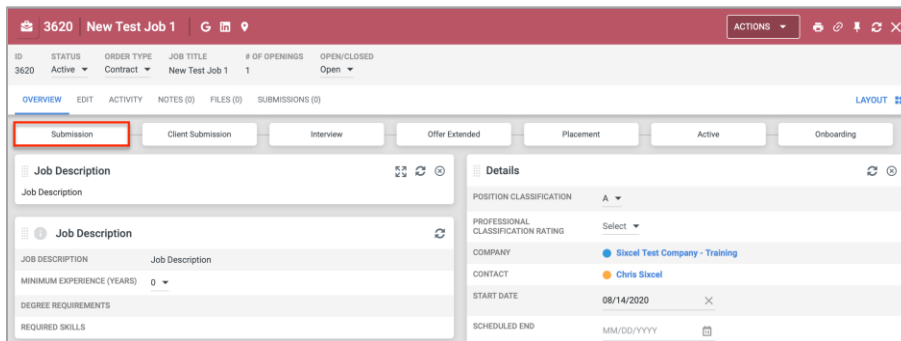
The Submission tab on each entity displays the items relevant to that entity.

- **Job:** Displays all Submission for the Job and indicates how many Submissions made it to each stage. Displays which Submission became Placements.
- **Candidate:** Displays the Submissions across all customers. Provides a quick view of how many times the candidate has been submitted, the number of times submitted to a client or interviews and which submissions became Placements.
- **Contact:** Displays Submission for all Jobs for which the Contact. Displays how many of the total submissions went to Client Submittal and/or Interview, as well as which became Placements.

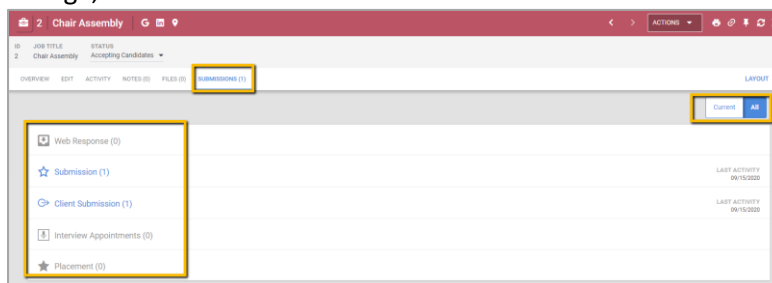
- **Company:** Displays total submission across all Jobs at the Company, how many were Client Submitted and/or had Interviews. Displays all Placements for the Company

Create and View Submissions

- **Workflow Breadcrumbs.** The first submittal from a Job, Candidate, Contact or Company can be added from the Workflow. Click **Submittal** and *Add Submission opens.*
 - After the initial submission, the Breadcrumb is a shortcut to *View Submissions.*
- **Actions.** Select **Add Submission** from the *Actions* dropdown on the Job or Candidate. This is the most common approach.

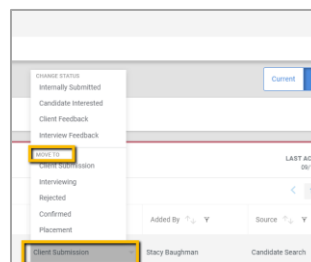


- **Submission tab.** Displays all the submissions for a Job or Candidate. Can update/advance the Submission from this tab
 - The view indicates how many Submissions in total, and how many have advanced to each stage, as well as the status of each Submission



Manage Submissions

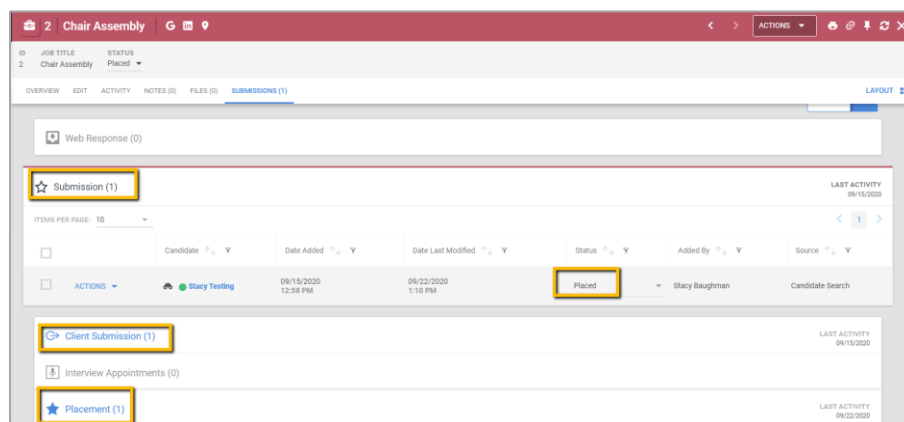
Use the **Status** field to move through stages of the Submission and/or to update status within a stage. (Please note statuses set automatically when Submission moves to a stage are not visible options in updating Status.) If at any point, the candidate or client decides to not move forward, select **Rejected** in Submission Status. *Move to Rejected* opens; select a reason and any details and click **Move**.



On screen, the Job Submission tab displays the four core Submission stages as well as Web Response:

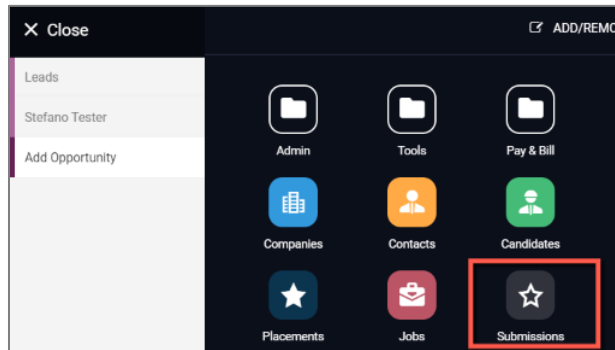
- **Web Response:** Candidates who have applied to the posted Job. Review these Candidates and determine if they should be moved to an active Submission or Rejected.
- **Submission:** This is the initial stage when the Submission record is created.
 - It is an internal stage that indicates the Candidate is being considered for the Job. Could be various statuses while still in this stage. In this stage there may be activity such as:
 - Review by Account Manage or Onsite
 - Internal screening process to confirm interest and / or fit
 - This record (section of the Submission tab) always displays the in progress or outcome of the submission process
 - When creating a Placement without any prior submittal process steps, a Submission record is automatically created. Every Placement has a companion Submission on the Job
 - **Submission/Confirmed:** When an offer is made to the candidate, move the Submission to Confirmed. This sets the Submission to *Offer Extended*.
- **Client Submission:** Used to share Candidate information with a Contact. When moving to the Client Submission stage, an email may be created or moved forward without an email if presenting the Candidate to the Contact by other means
- **Interviewing (interview Appointments):** Move to this stage if the client will interview the Candidate. An Appointment is created where an interview type is selected. A Candidate may remain in this stage for more than one interview. (Create additional Interview Appointments via Action)
- **Placement:** When the Candidate accepts the position and all pre-assignment requirements are met, move the Submission to Placement. This ends the Submission process and initiates a Placement record.

In this example, there was one Submission that went to Placement. In the Submission process, there was a Client Submission but no Interview.



Submissions List View

See all Submissions from the List View. From the **Menu**, select **Submissions**



From the List View see Submissions across Jobs, viewing for a particular Company (Job Client Company), in a particular Status or submitted by a specific User. The List View is particularly useful for managing Web Responses.

- Filter by Status to find all Web Responses. Navigate to the Candidate or Job as needed. Select Submissions and take Action as needed.

A screenshot of the 'Submissions' list view interface. It features a search bar, filter dropdowns for 'Columns', 'Users', and 'Favorites', and a 'Clear' button. Below is a table with columns: Id, Job Client Company, Job Status, Job, Status, Added By, and Candidate. A single row is visible with the following data: Id: 21908, Job Client Company: Ferrari Manufacturing, Job Status: Active, Job: maintenance technician, Status: Web Response, Added By: Unassigned User, Candidate: gffgfg fgfg.

<input type="checkbox"/>	Id	Job Client Company	Job Status	Job	Status	Added By	Candidate
<input type="checkbox"/>	21908	Ferrari Manufacturing	Active	maintenance technician	Web Response	Unassigned User	gffgfg fgfg