

# BULLHORN CANDIDATE RECORD

## New Candidate, Post Pre-screen & AE Submission Candidate Ownership Requirements



### Add Candidate

FIRST NAME ● \_\_\_\_\_

MIDDLE NAME \_\_\_\_\_

LAST NAME ● \_\_\_\_\_

STATUS ● \_\_\_\_\_ ▼

TITLE ● \_\_\_\_\_

CANDIDATE EMPLOYMENT STATUS ● select the candiadtes current employment situation ▼

CURRENT COMPANY \_\_\_\_\_

EMPLOYEE TYPE \_\_\_\_\_ ▼

SOURCE ● \_\_\_\_\_ 🔍

REFERRED BY \_\_\_\_\_ 🔍

OWNERSHIP ✓ Ashley Waggoner ✕

#### General Information

EMPLOYMENT PREFERENCE \_\_\_\_\_ 🔍

CURRENT SALARY \_\_\_\_\_ USD

DESIRED SALARY \_\_\_\_\_ USD

CURRENT PAY RATE \_\_\_\_\_ USD

DESIRED PAY RATE \_\_\_\_\_ USD

DESIRED LOCATIONS \_\_\_\_\_ 🔍

DATE AVAILABLE \_\_\_\_\_ 📅

GENERAL CANDIDATE COMMENTS \_\_\_\_\_ ✍️

**FIRST NAME:** Required First name. (not an initial)

**LAST NAME:**

1. Not required to enter a new candidate
2. REQUIRED TO RETAIN CANDIDATE OWNERSHIP / CREDIT FOR A PS

**STATUS:**

- **New Lead** = newly added to the system have NOT communicated – NOT prescreened.
- **Active** = once a PS has occurred AND is actively engaged in JO reqs
- **Passive** = AFTER PS occurred – not actively engaged in Job/Req conversations
- **INTERVIEWING** = in the interview process with Optomi
- **Offer Pending** = mark if candidate is in Offer pending within OPS
- **ON ASSIGNMENT** = Candidate is on assignment with Optomi
- **UNAVAILABLE** =
- **DNC**: only to be marked by Delivery lead and above.
- **Archive** = Deceased/Retired/No Longer In industry etc.
- **Placed Perm**: Candidate has been placed in a perm role by optomi
- **Converted to Perm**: Candidate has converted to perm employee on a CTH engagement
- **Provalus-Sourcing**

**TITLE:** make sure this is accurate

**CANDIDATE EMPLOYMENT STATUS:** (On Contract, Full Time, Unemployed)

1. Not required to enter a new candidate
2. REQUIRED TO RETAIN CANDIDATE OWNERSHIP / CREDIT FOR A PS

**CURRENT COMPANY:**

**EMPLOYEE TYPE:** ( W2; 1099; C2C)

1. Not required to enter a new candidate
2. REQUIRED TO RETAIN CANDIDATE OWNERSHIP / CREDIT FOR A PS

**SOURCE:**

- **BULLHORN DATABASE:** Name/Buyer found on LI
- **Referral:** if referred from a candidate, mark and make sure the "REFERRED BY" Field below is filled out.
- **Reference Check:** New contact or newly made contact from checking a reference
- **Discover ORG:** candidate sourced from DiscoverOrg
- **DICE Resume Database:** New Contact as a result of a recruiter lead.
- **Corporate Website:**
- **LinkedIn:**
- **3rd Party**
- **Indeed.com**
- **Event**
- **Other**
- **Glassdoor**
- **Provalus-Sourcing:**

**REFERRED BY:** if the candidate was referred by someone please enter their name, this pulls from BH

**OWNERSHIP:** defaults upon entering, a new candiadt4e

**EMPLOYMENT PREFERENCE:** (Contract/Contract to Hire/Direct Hire); Choose ALL that are relevant.

**CURRENT SALARY / DESIRED SALARY:**

**CURRENT PAY RATE / DESIRED PAY RATE:**

**DESIRED LOCATIONS:**

**DATE AVAIL:** if candidate is on Contract or even CTH this is always a best practice to update.

**GENERAL CANDIDATE COMMENTS:**

# BULLHORN CANDIDATE RECORD

## New Candidate, Post Pre-screen & AE Submission Candidate Ownership Requirements



☰ Contact Information

EMAIL 1

BIRTHDAY

PRIMARY PHONE

ALTERNATE PHONE

REMOTE ONLY?

ADDRESS

Address  Address2

City  State  Zip

United States

☰ Category & Skills

SKILLSET

SKILLS

INDUSTRY

COMPLETED OPT2VUE?  Yes  No

REFERENCE COMPLETED?  Yes  No

SCHEDULE NEXT ACTION

None
Add Submission
Add Client Submission

ONBOARDING RECEIVED SENT

**EMAIL:**

- Not required to enter a new candidate
- **REQUIRED TO RETAIN CANDIDATE OWNERSHIP** along with documented email communication after a Pre-Screen (pls reference Figure 1 below)

**BIRTHDAY :**

**PRIMARY PHONE:**

- Not required to enter a new candidate
- **REQUIRED TO RETAIN CANDIDATE OWNERSHIP / CREDIT FOR A PS**

**ALTERNATE PHONE**

**REMOTE ONLY:**

- Not required to enter a new candidate
- **REQUIRED TO RETAIN CANDIDATE OWNERSHIP / CREDIT FOR A PS**

**ADDRESS**

- If entering a new candidate City and state is only requirement.
- **REQUIRED TO RETAIN CANDIDATE OWNERSHIP / CREDIT FOR A PS \*\***

**SKILLSET – REQUIRED TO ENTER A CANDIDATE**

you can choose multiple!! This is an extremely useful tool for targeted OTT's, matching candidates to contacts, JO's etc. Example, if you had an IT Director who hired or had a need for .Net Developers and or Web Dev's (application/web development/), QA, and Salesforce you could choose all 3. Similarly, if you had an Infrastructure manager who hired for or was over Infrastructure, Security & Helpdesk, you would choose, INFRASTRUCTURE, Cybersecurity, & Support.

- |                               |                           |
|-------------------------------|---------------------------|
| • Application/Web development | • QA                      |
| • App Dev - Java              | • Functional              |
| • Cybersecurity               | • UI/UX/Digital Marketing |
| • Data-BI                     | • DevOps/Cloud            |
| • Data-Database               | • ServiceNow              |
| • Infrastructure              | • EMR Analyst             |
| • Salesforce                  | • EMR Support/Trainer     |
| • Support                     | • App Dev – Healthcare    |

**SKILLS:**

1. Not required to enter a new candidate

**INDUSTRY:** very important that you list ALL industries this candidate has experience in.

1. Not required to enter a new candidate
2. **REQUIRED TO RETAIN CANDIDATE OWNERSHIP / CREDIT FOR A PS**

**COMPLETED Q2V?:** if yes check yes,

**REFERENCE COMPLETED?**

.

**BULLHORN CANDIDATE RECORD**  
 New Candidate, Post Pre-screen & AE Submission Candidate Ownership Requirements  
 REQUIRED FIELDS TO AE SUBMIT & Retain candidate Ownership



ID	FIRST NAME	LAST NAME	PRIMARY PHONE	ALTERNATE PHONE	EMAIL 1
468097	STEVE	COUCH	+1 817 907-3714		Willis.Steven.Couch@gmail.com

**STEVE COUCH**

**PROFESSIONAL EXPERIENCE**

**NCR** November 2019 – PRESENT  
 Contract Lead Software Engineer  
 • Technologies: Visual Studio 2019, C++, C#, SQL, Python, git, NUnit, BitBucket, XML.  
 • Worked on Aloha POS software for restaurants.

**THOMSON REUTERS** 1997 – October 2019  
 Lead Software Engineer/Software Architect 2013 – October 2019  
 • Technologies: Visual Studio 2013, .NET 4.6, C#, C++ MFC/ATL, T-SQL, PL/SQL, NUnit, WPF, MVC, RESTful Services, JSON, XML, NHibernate, JQuery, AngularJS.

**Details**

OWNERSHIP	Jack Ulfsrud
SKILLSET	Application Development
ADDRESS	Fort Worth Texas United States
TITLE	Lead Software Engineer/Software Architect
CURRENT COMPANY	THOMSON REUTERS
EMPLOYEE TYPE	W2
SOURCE	LinkedIn

**DESIRED LOCATIONS**

**EMPLOYMENT PREFERENCE** Direct Hire, Contract, Contract To Hire

**Card 1**

STATUS	Offer Pending
CANDIDATE EMPLOYMENT STATUS	Unemployed
DATE AVAILABLE	06/17/2020
SKILLSET	Application Development
SKILLS	.NET Automated Testing C++ Middleware Oracle <a href="#">+9 more</a>
INDUSTRY	Hi tech/Software/Product Dev Financial Services
CURRENT SALARY	
DESIRED SALARY	\$0.00
CURRENT PAY RATE	
DESIRED PAY RATE	\$0.00
REMOTE ONLY?	no

**Card 2**

COMPLETED OPT2VUE?	No
REFERENCE COMPLETED?	Yes

**FIRST & LAST NAME**

**PRIMARY PHONE:**

**EMAIL ADDRESS:**

must be current AND show that email correspondence \* (Please reference Figure 1 on next page)

**RESUME:** Current Resume Parsed in the main candidate record.

**OWNERSHIP:** Should be your name if you are submitting them ;)

**SKILLSET:**

**ADDRESS** For an AE submittal, City, State AND ZIP are required.

**TITLE**

**CURRENT COMPANY**

**EMPLOYEE TYPE:**

**SOURCE:**

**EMPLOYMENT Preference:** - must list all that apply

**STATUS:** - ( should be changed upon AE Submission, and throughout JO process)

**CANDIDATE EMPLOYMENT STATUS:** must be current upon submission

**Date Available:**

**SKILLSET:** must have

**SKILLS:**

**INDUSTRY:** very important that you list ALL industries this candidate has experience in.

**CURRENT & DESIRED SALARY** – Should match the AE Sub & your Prescreen

**CURRENT PAY & DESIRED Pay** – Should also Match the AE Sub, and your Pre Screen

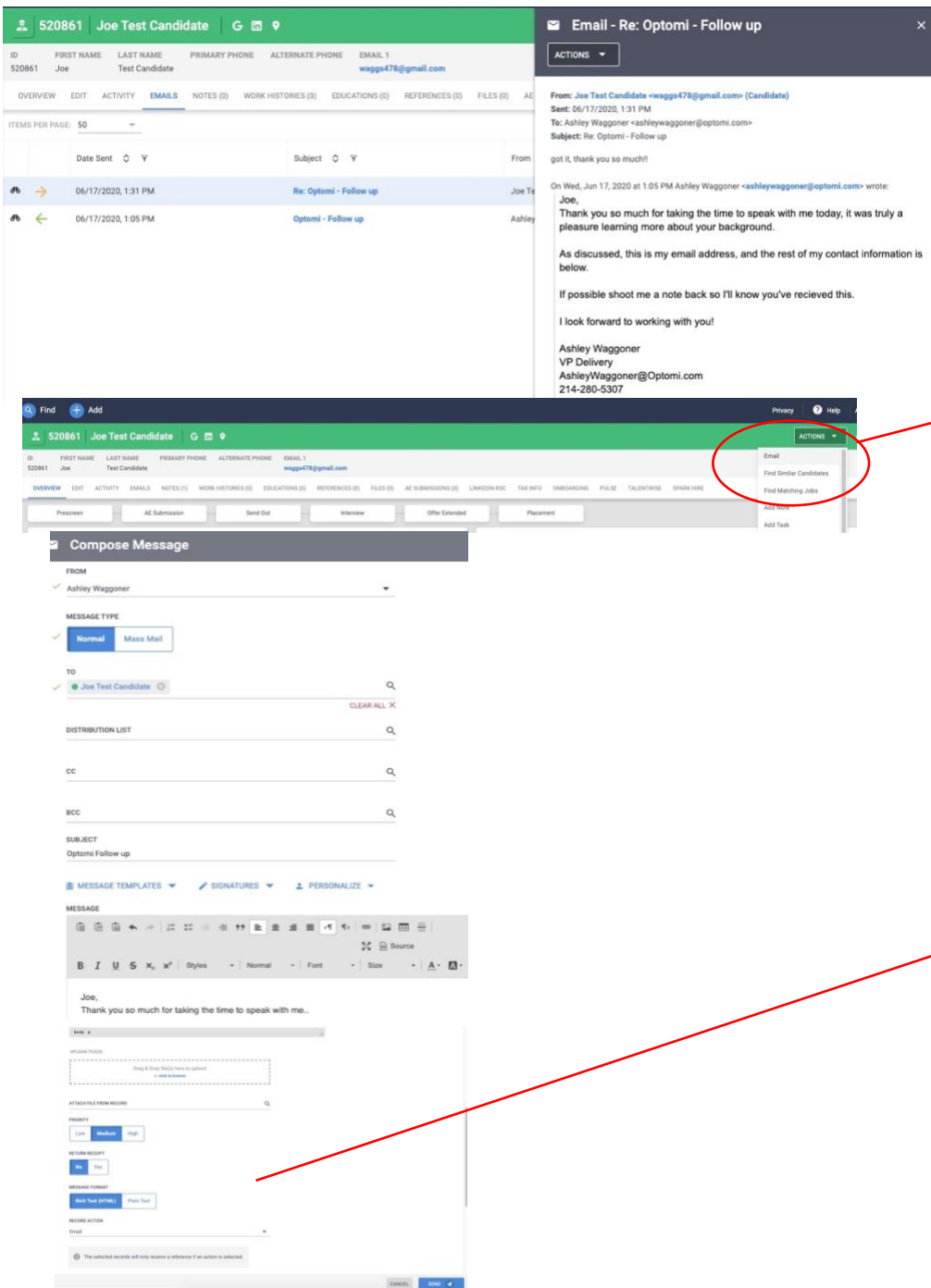
**COMPLETED O2V?:** if yes, and in the AE Sub mark yes

**REFERENCE COMPLETED?** check yes if in file

# BULLHORN CANDIDATE RECORD

## New Candidate, Post Pre-screen & AE Submission Candidate Ownership Requirements

FIGURE I.



### EMAIL CORRESPONDENCE (POST PRE-SCREEN)

- To retain candidate ownership, after a Pre-Screen you must show documented email communication. In addition - It's always a best practice to thank any consultant for taking the time to speak with you and share your contact information.

\*Before finalizing any pre-screen even if you didn't have the full candidate resume make sure you ask them for and verify their email address and contact information and let them know to be on the lookout for an email from you immediately following your conversation.\*

Emails can be quickly sent directly from a candidate record. ( as shown below) OR from your email, assuming that the candidate email address is within the file PRIOR to sending the email

From the Candidate Record  
**Actions:**  
**Email**

### Under Compose Message

Type your follow up message – below is an example

*Joe,  
 Thank you so much for taking the time to speak with me today, it was truly a pleasure learning more about your background.  
 As discussed, this is my email address, and the rest of my contact information is below.  
 If possible, shoot me a note back so I'll know you've received this.  
 I look forward to working with you!*

*Ashley Waggoner  
 VP Delivery  
[AshleyWaggoner@Optomi.com](mailto:AshleyWaggoner@Optomi.com)  
 214-280-5307*

### Select Record Action:

Choose "Email" from the drop down.

### Select Send.

Once the candidate replies the proper email communication will show within the candidate Record under "Emails" as shown in Figure I. Above,

# BULLHORN CANDIDATE RECORD

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### PRE AE-SUBMISSION WORKFLOW REQUIREMENTS



\*All AE Submissions are required to flow through Bull Horn on a real time basis, Failure to do so may result in the loss of commissions. \*

**FILES –**  
to AE Submit ANY candidate the Resume you submit needs to be included (AND NAMED PROPERLY) within the candidate Files. **UNFORMATTED RESUMES should include the Distribution type if INTERNAL vs. GENERAL**  
\*\*PLEASE NOTE, there are specific accounts/ clients that require various resume naming conventions AND specifics\*\* to confirm please reference the AE SUBMISSION Template within Bullhorn. IF there is no resume naming convention OR format required the **OPS Standard** should always be used (inclusive of Logo, Formatting, font etc)

#### RIGHT TO REPRESENT EMAILS\*

All AE Submissions need to have email correspondence with the candidate containing "Right to Represent" / Rate confirmation/ conversation follow up.

To quickly send RTR or Follow up from the candidate file see instructions below.  
When sending an email confirmation RTR to a candidate make sure:

1. You Record the Action as an EMAIL
2. You tag / Reference the Job Req that it pertains too
3. You Reference the candidate.

Once your candidate replies back with "approved" their candidate record will be similar to the below.

Date Added	Name	File Type	Distribution	Visibility	File Size
06/17/2020, 11:58 AM	Steve Couch_NCR Candidate.docx	Formatted Resume	General	Public	2 MB
05/08/2020, 12:42 PM	Steve Couch_Optimi Candidate.docx		General	Public	2 MB
05/05/2020, 9:33 AM	Steve Couch_Optimi Candidate.docx		General	Public	2 MB

Date Sent	Subject	From
06/17/2020, 1:55 PM	Re: OPS - Right to Represent - Please APPROVE	Joe Test Candidate
06/17/2020, 1:53 PM	OPS - Right to Represent - Please APPROVE	Ashley Waggoner
06/17/2020, 1:31 PM	Re: Optimi - Follow up	Joe Test Candidate

**RECORD ACTION**  
Email

**JOB REFERENCE**  
.NET Developer

**CANDIDATE REFERENCE**  
Joe Test Candidate

Dear Joe,  
Thanks for taking the time to discuss opportunities with Optimi today! As discussed on our call, please reply back to this email with the word "APPROVE" to move forward with the .NET Developer position at ABC at a rate of \$55.40 / hour.

I look forward to working with you!

Best,

**Email - Re: OPS - Right to Represent - Please APPROVE**

From: Joe Test Candidate <wagge478@gmail.com> (Candidate)  
Sent: 06/17/2020, 1:55 PM  
To: Ashley Waggoner <ashleywaggoner@optimi.com>  
Subject: Re: OPS - Right to Represent - Please APPROVE

approved,  
Thank you!

On Wed, Jun 17, 2020 at 1:53 PM Ashley Waggoner <ashleywaggoner@optimi.com> wrote:

Dear Joe,  
Thanks for taking the time to discuss opportunities with Optimi today! As discussed on our call, please reply back to this email with the word "APPROVE" to move forward with the .NET Developer position #13342 at ABC at a rate of \$55.40 / hour.

I look forward to working with you!

Best,

Ashley Waggoner  
VP of Delivery  
OPTIMI PROFESSIONAL SERVICES  
Mobile: 214.280.5307  
ashleywaggoner@optimi.com  
www.optimiservices.com