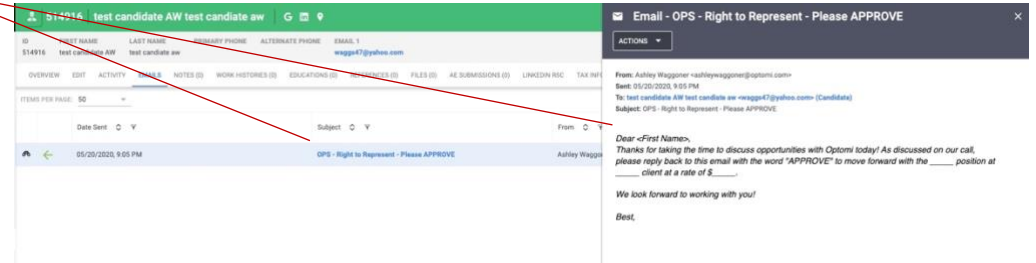
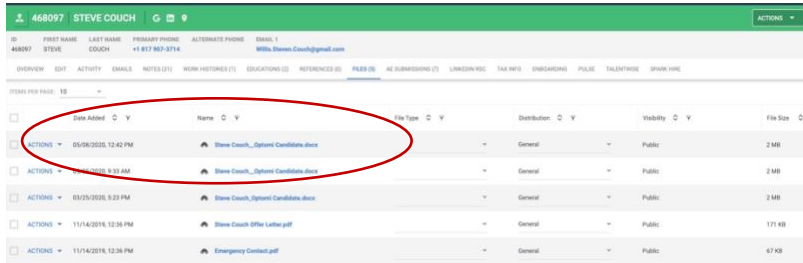


BULLHORN

AE Submission- Placement Requirements & Workflow

I. AE Submission - (Delivery)

Prior to any AE Submission Ensure the properly formatted Optomi Resume is uploaded into the candidate file with the appropriate naming convention, That the candidates most recent up to date resume is parsed into the main candidate record AND that there is the applicable right to represent email correspondence within the candidate record.



If entering from Job order Record - Enter your candidates name

If Entering from Candidate profile: enter the JOB

Pay Rate: Enter pay rate they are cleared at for the position you are submitting them for. ***

Salary: only enter if CTH OR Perm

From the Submission Template Drop down Choose: "AE Submission Template"

Insert all appropriate information: Inclusive of the Op2Vue, Spark Hire, Linked in URL etc.

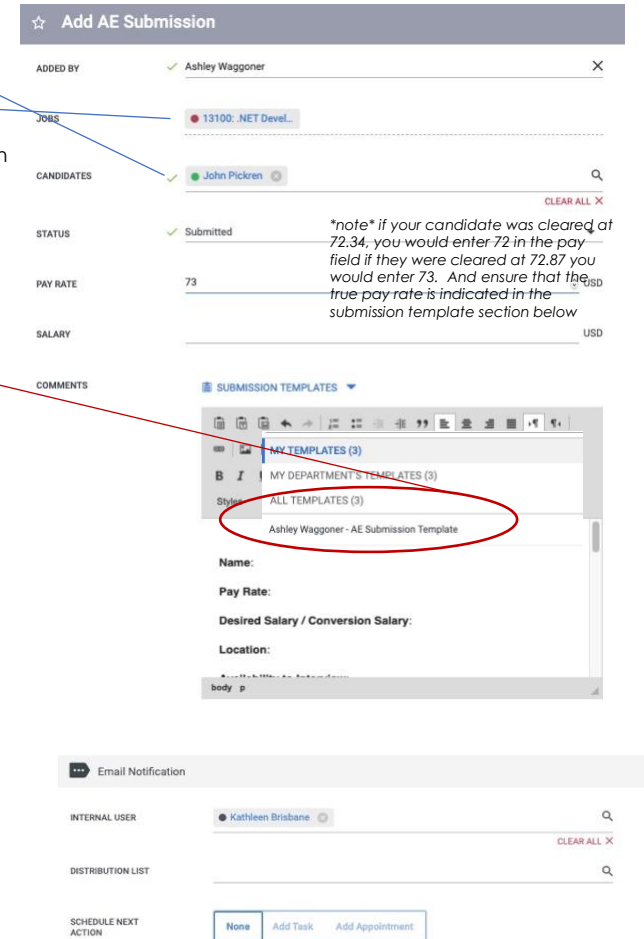
- Name
- Pay Rate
- Desired Salary/Conversion Salary
- Location:
- Availability to Interview:
- Availability to Start
- Work Authorization:
- Motivation for Search:
- Additional information:
- Culture Fit:
- Opt2Vue or LinkedIn Page:
- Core Client Criteria:
- Reference Quote:

PLEASE NOTE: if the AE submission is for a VMS Client add the REQ#; month/ year of birth AND or any other information required for submittal

Email Notification

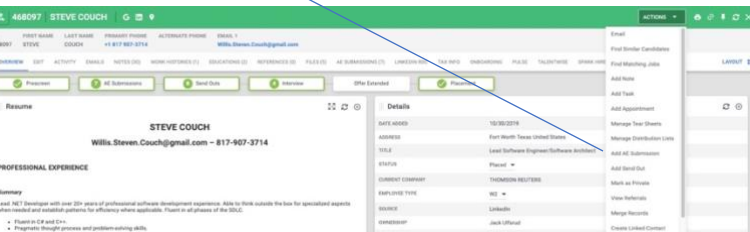
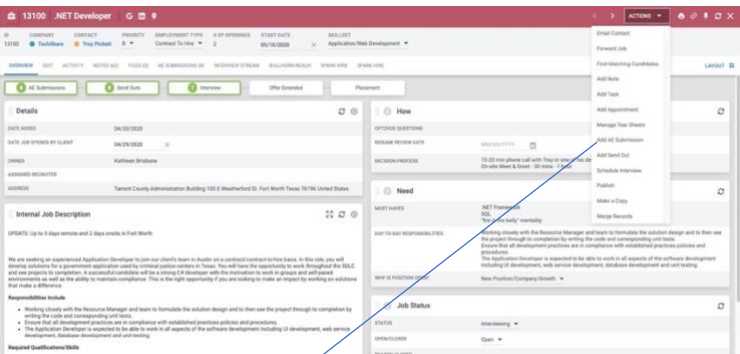
Automatically defaults to the "AE Job owner" **always add:**

- Your Delivery Lead
- The Sales leader for the respective AE.



note if your candidate was cleared at 72.34, you would enter 72 in the pay field if they were cleared at 72.87 you would enter 73. And ensure that the true pay rate is indicated in the submission template section below

An AE Submission can be added from two places: the Candidate profile record OR the Job order Record



BULLHORN

AE Submission /Rejection - Requirements & Workflow

II. AE Submission (Sales)

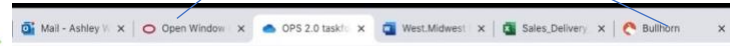
Candidate Submitted to Job #13088

From: Ashley Waggoner <ashleywaggoner@optima.com>
 Sent: Monday, May 4, 2020 5:28 PM
 To: Matt Robinson <mattrobinson@optima.com>; Ashley Waggoner <ashleywaggoner@optima.com>
 Subject: Candidate Submitted to Job #13088

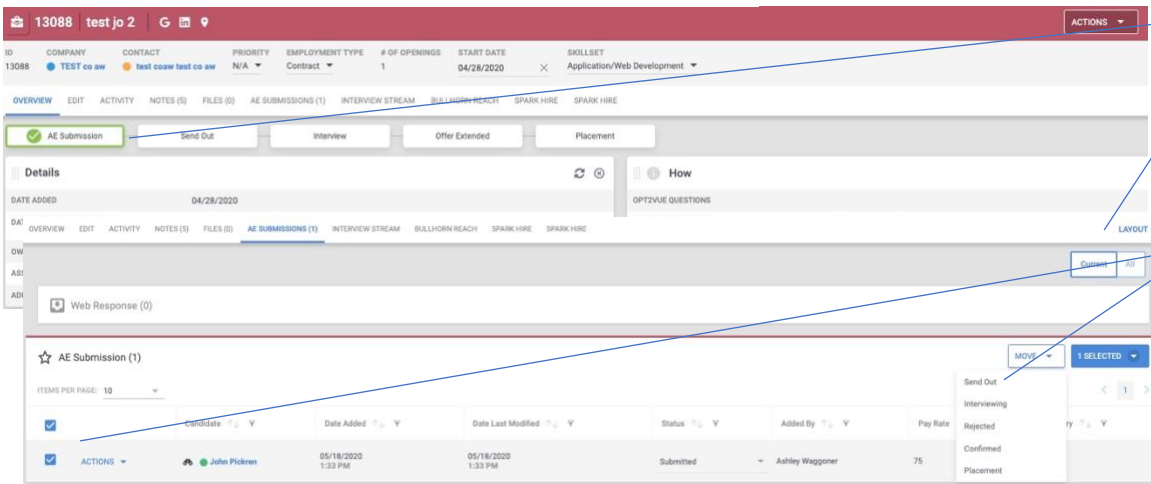
Ashley Waggoner has submitted the following Candidate(s) to Job #13088, test jo 2 (Company: TEST co, Inc.)

John Picken

AE Submission to Sendout - From your email, select the hyperlink for your JOB # (will take you to your open JO) OR click the hyperlink for the candidate (will take you to the candidate record). Once you click a new browser tab will open- once loaded go back to the main bullhorn application of the candidate or Job record. OR go into bullhorn under your Job order



Link successfully opened.
 You may now close this page and return to Bullhorn.



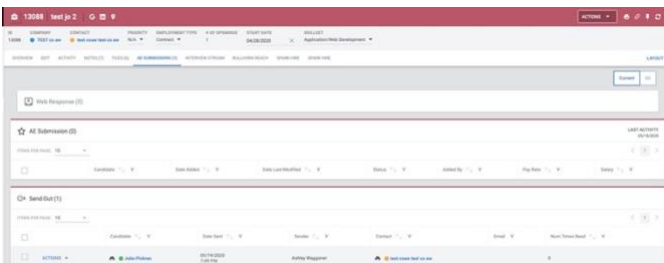
Under your Job order- select "AE Submission"

Make 100% sure your view in the upper right-hand corner is set to "Current" vs. "All".

To Quickly View the submitted candidates information (history, parsed resume, details, notes and prior submission history) you can utilize the binoculars view. For further details reference appendix XXX1 below.

If the candidate will be submitted to the client, select the appropriate candidate - under "move" select Send Out.

If you are NOT submitting the candidate to your job req. - please refer to section III below "AE rejection"

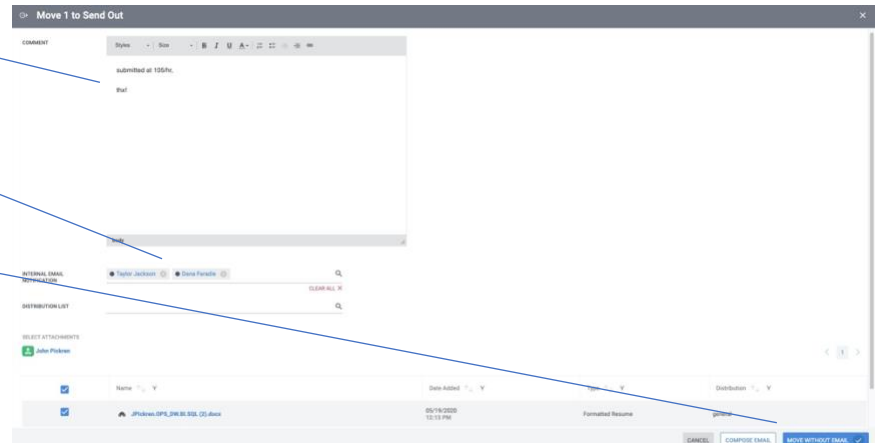


Upon selecting move to "Send Out" add the BILL rate in the COMMENT section and or the salary range you are submitting the candidate to your client at.

Under INTERNAL EMAIL NOTIFICATIONS tag the recruiter who submitted them to you.

Select "move without email"

When you email your client- always copy the associated recruiter/ delivery lead and any other relevant internal contacts.



Upon moving the candidate will show as "Send Out" under your Job Req.

Failure to submit any candidate outside of Bullhorn may result in loss of commission.

BULLHORN AE Submission /Rejection - Requirements & Workflow



III. Sales Rep Rejection- (Sales)

If you are NOT submitting the candidate to your job req

The screenshot shows the Bullhorn interface for job order 13088. The top navigation bar includes 'OVERVIEW', 'EDIT', 'ACTIVITY', 'NOTES (5)', 'FILES (0)', 'AE SUBMISSIONS (1)', 'INTERVIEW STREAM', 'BULLHORN REACH', 'SPARK HIRE', and 'SPARK HIRE'. The 'AE Submission (1)' section is active, showing a table with one entry:

Candidate	Date Added	Date Last Modified	Status	Added By	Pay Rate
John Pickens	05/19/2020 5:15 PM	05/19/2020 7:54 PM	Submitted	Ashley Waggoner	72

A 'MOVE' dropdown menu is open over the 'Submitted' status, with 'Rejected' selected.

Under your Job order- click "AE Submission"

Make 100% sure your view in the upper right-hand corner is set to "Current!" vs. "All".

If you are not submitting the candidate, select the appropriate candidate - under "move" select Rejected.

The screenshot shows the Bullhorn interface after the candidate has been moved to 'Rejected'. The 'Rejected (1)' section is active, showing a table with one entry:

Candidate	Date Added	Date Last Modified	Status	Added By	Pay Rate	Salary
John Pickens	05/19/2020 5:15 PM	05/20/2020 7:58 PM	Sales Rep Rejected	Ashley Waggoner	72	

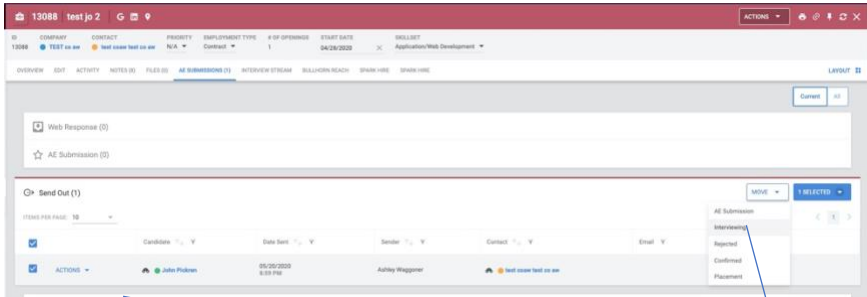
Upon moving the candidate will show as "Sales Rep Rejected" under your Job Req.

Upon selecting move to "**SALES REP REJECTED**" from the drop down -in the COMMENT section – add the reason why they will not be submitted

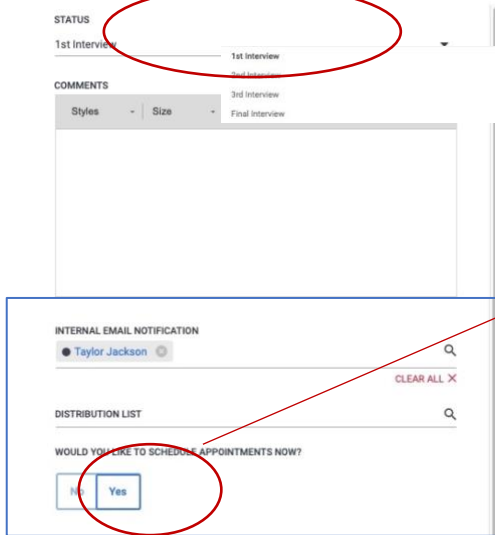
Under **INTERNAL EMAIL NOTIFICATION** tag the recruiter who submitted them to you. Select "**MOVE**"

The 'Move 1 to Rejected' dialog box is shown. It includes a 'STATUS' dropdown with 'Sales Rep Rejected' selected. The 'COMMENTS' section contains the text: 'candidate has not worked in last 6 months, candidate over the max pay rate.. (etc)'. The 'INTERNAL EMAIL NOTIFICATION' section has 'Taylor Jackson' and 'Ben Tucker' selected. At the bottom, there are 'CANCEL' and 'MOVE' buttons.

IV. Scheduling a Candidate Interview – (Delivery)



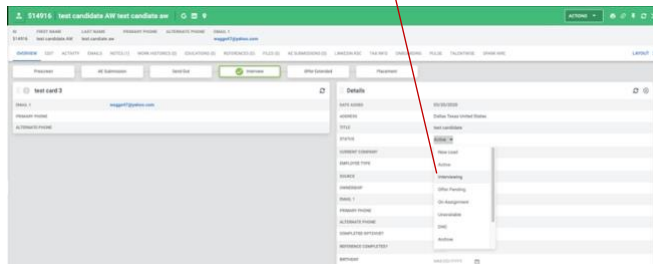
Move 1 to Interviewing



Under the appropriate Job order- select your candidates name, under **move** select **Interviewing**.

When the next screen pops up - Select the appropriate interview (1st, Final etc) scroll down and select **YES**, under "would you like to schedule an appointment now?"

Upon moving make sure you change the status of your candidate from "active" to "interviewing"



When the add appointment, screen opens up

You can schedule and send a full calendar invite to your candidate directly from BULL horn, including their formatted resume, by including your candidate in the ATTENDEES section

Under **TYPE** select **Interview**

Make sure Visibility is set to Public

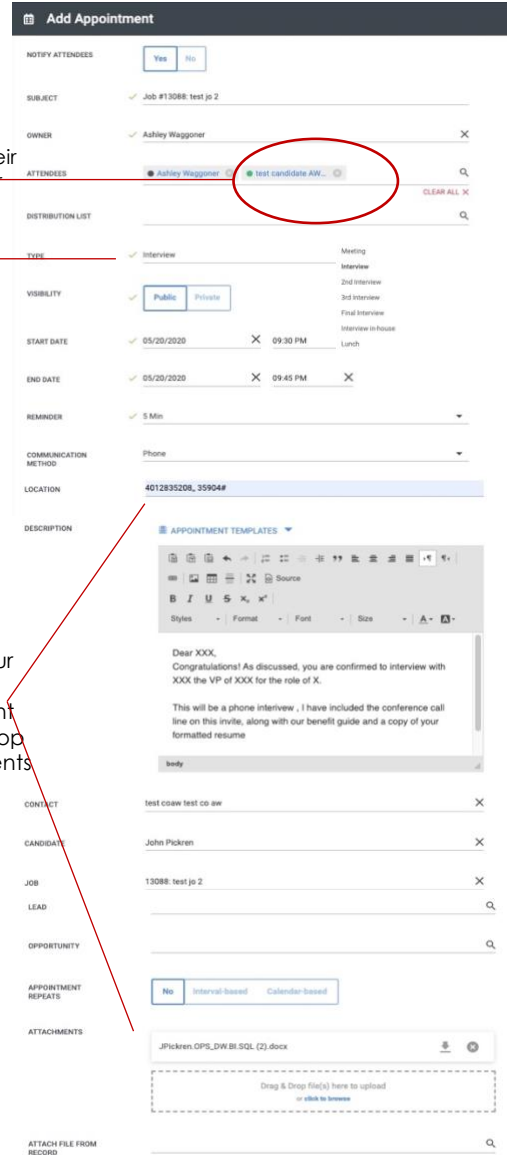
Enter the correct start /end date and times.

Under **communication method** select the appropriate method

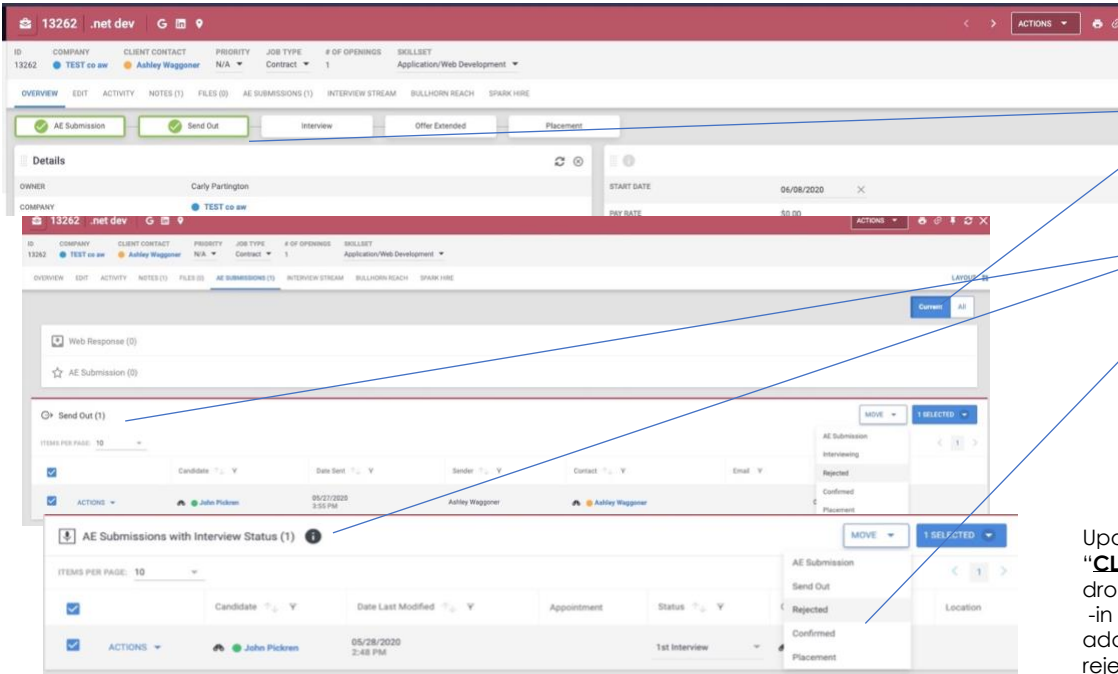
- Phone
- Onsite appointment
- Offsite appointment

Enter the location (conference bridge, address etc)

If you are sending the invite to your candidate through BH: include a note in the appointment section and you can drag and drop any attachments OR pull documents from any CO, Candidate or Job Record file (JD, Benefits etc)



V. Client Rejection – (after send-out, OR after a Client interview) - Sales

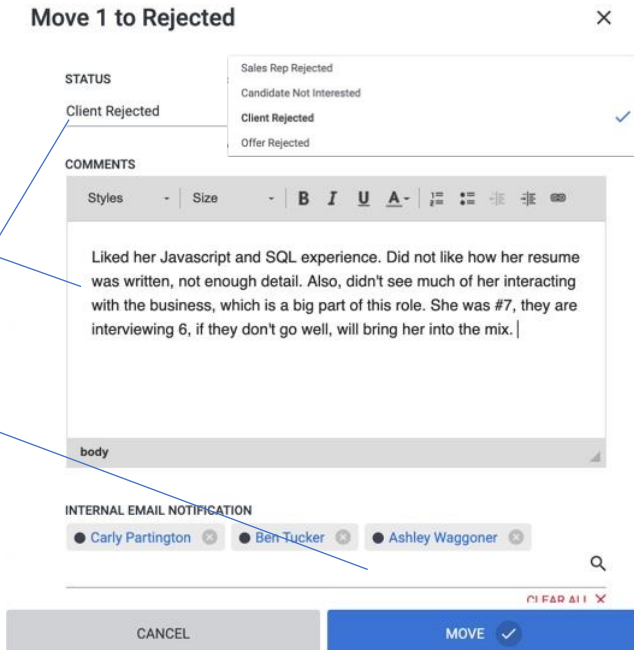


Under your Job order- click "AE Submission" or "Send Out"

Make 100% sure your view in the upper right-hand corner is set to "Current!" vs. "All".

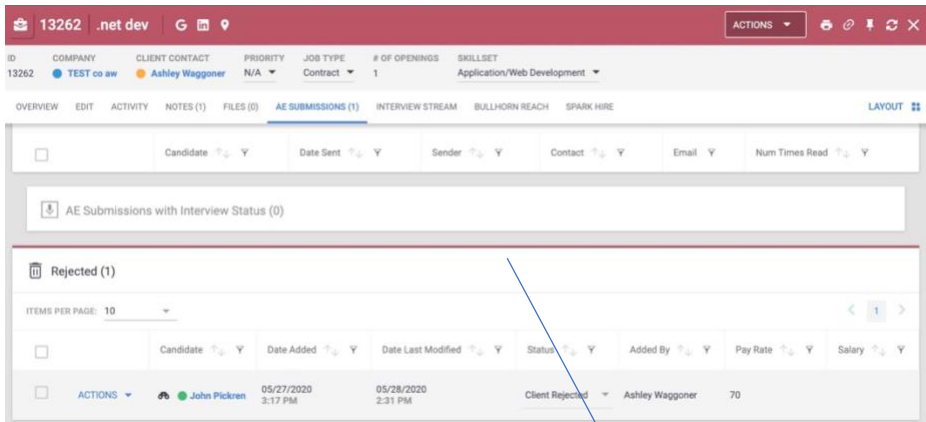
If a candidate is rejected by your client

After a Send out or after an interview- select the appropriate candidate - under "move" select **Rejected** from the drop down menu



Upon selecting move to "**CLIENT REJECTED**" from the drop down -in the COMMENT section – add the reason why they were rejected

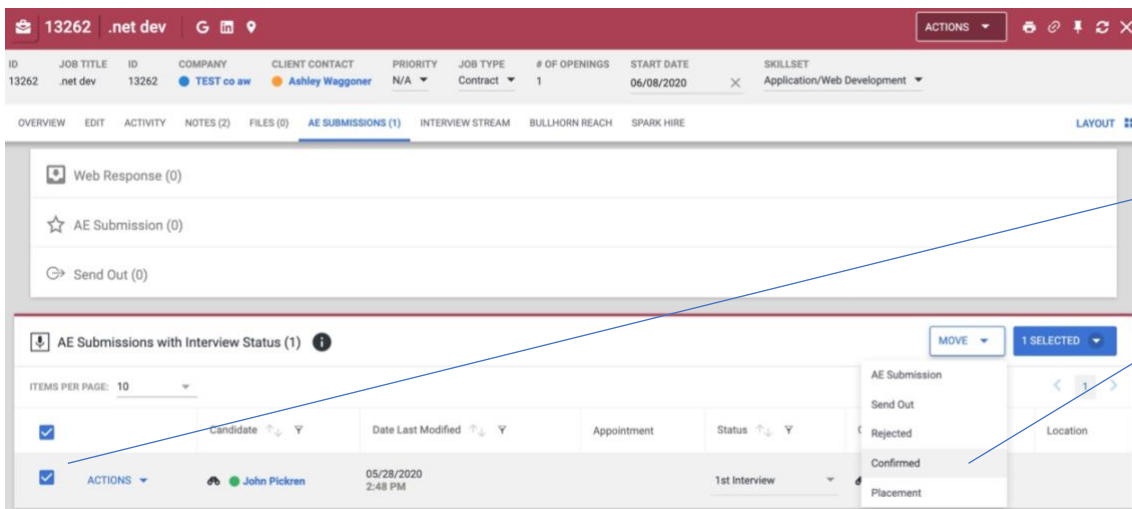
Under **INTERNAL EMAIL NOTIFICATION** tag the recruiter who submitted them to you. Select "**MOVE**"



Upon moving the candidate will show as "Client Rejected" under your Job Req.

BULLHORN AE Submission /Rejection - Requirements & Workflow

VI. Offer Extended – (Delivery)



Under the Job order- select "AE Submission"

Make 100% sure your view in the upper right-hand corner is set to "Current" vs. "All".

Under AE Submissions with Interview Status

Select your candidate

Under move select "Confirmed" from the drop-down menu.

Move 1 to Confirmed

STATUS

Offer Extended

COMMENTS

Styles - Size - **B** *I* U A -

offer extended at 72/hour
pending start date of 6/8/20

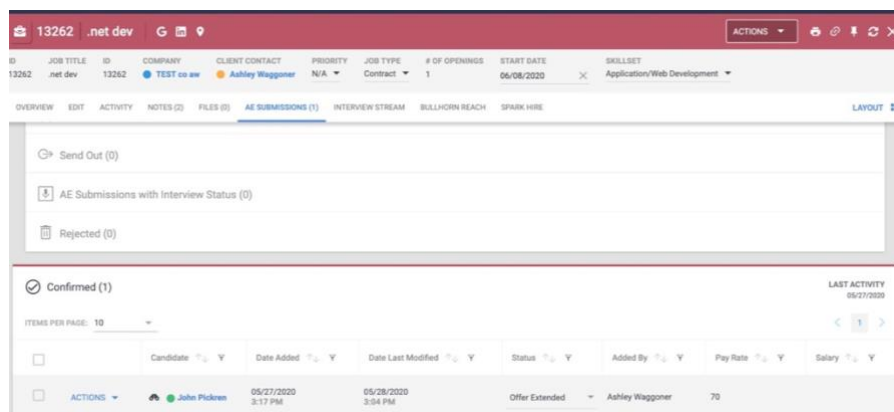
body

INTERNAL EMAIL NOTIFICATION

Ashley Waggoner

CLEAR ALL X

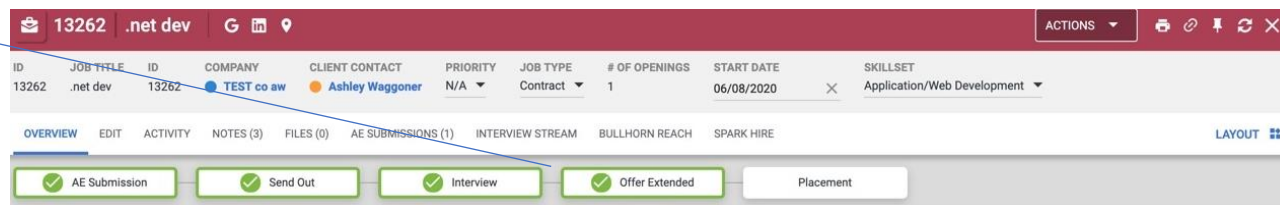
CANCEL MOVE ✓



Upon moving the candidate will show as "Offer Extended" under the Req and the Job Req will show it has an offer extended to a candidate

Upon selecting move to "Offer Extended" from the drop down -in the COMMENT section - Add the \$ amount offered to the candidate & any other information.

Under **INTERNAL EMAIL NOTIFICATION** tag the AE who submitted them to you. Select **"MOVE"**



Failure to submit any candidate outside of Bullhorn may result in loss of commission.

VII. Offer Extended/ Offer Rejected, (Delivery)
If your candidate turns down the offer

The screenshot shows the Bullhorn interface for job ID 13262. The 'AE SUBMISSIONS (1)' tab is active, showing one candidate in 'Confirmed' status. A 'MOVE' dropdown menu is open, with options: AE Submission, Send Out, Interviewing, Rejected, and Placement. The 'Rejected' option is highlighted.

Under the Job order- select "AE Submission"

Make 100% sure your view in the upper right-hand corner is set to "Current" vs. "All".

Under "Confirmed"
Select your candidate
From the MOVE drop down menu select "Rejected"

The screenshot shows the same Bullhorn interface, but the candidate's status is now 'Offer Rejected'. The 'Rejected' count in the top left of the table has increased to 1.

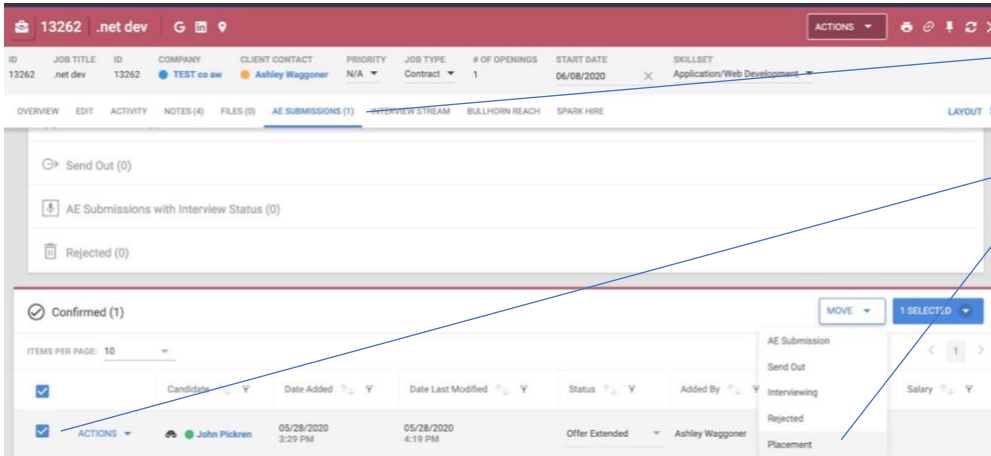
Upon moving the candidate will show as "Offer Rejected" under the Req

Select "**Offer Rejected**" from the drop down
-in the COMMENT section –
Make sure you put the reason(s) why it was rejected

Under **INTERNAL EMAIL NOTIFICATION** tag the AE & Select "**MOVE**"

The dialog box titled 'Move 1 to Rejected' shows the 'STATUS' set to 'Offer Rejected'. The 'COMMENTS' section contains the text: 'Candidate turned down the offer and is moving forward with another opportunity with XXX company. Ultimately it came down to \$\$, stability, tech stack etc'. The 'INTERNAL EMAIL NOTIFICATION' section shows 'Carly Partington' and 'Ashley Waggoner' selected. At the bottom, there are 'CANCEL' and 'MOVE' buttons.

VIII. Offer Accepted – Placement, (Delivery)
If/when your candidate accepts the offer



Under the Job order- select "AE Submission"

(Make 100% sure your view in the upper right-hand corner is set to "Current" vs. "All")

Under "Confirmed" - Select your candidate
From the MOVE drop down menu select **"Placement"**

Under **INTERNAL EMAIL NOTIFICATION** tag the AE, RVP and Delivery lead & Select **"MOVE"**

