Create and Use Candidate Pools

The objective of this guide is to create Candidate Pools.

Security Role

- Recruiter

Contents

Create Candidate Pool

1. Type "Create Candidate Pool" into the search box and select the task with this name.
2. Name your Candidate Pool – choose something that will make it recognizable to you (consider starting it with your agency abbreviation).
3. Choose a type. Static Pool is most common because it is a manual list that you maintain.
4. Decide whether you want this to be a private or public list by checking or unchecking the "Restricted View" box.
5. Assign the Candidate Pool Manager role – it will automatically default to you as its creator, but you can click the "pancake" (three bars) button next to your name to add other curators.

View Candidate Pool

1. To view a Candidate Pool, type "View Candidate Pool" in your search bar and select that report.
2. In the Candidate Pool selection box, the available Candidate Pools will be listed in alphabetical order.
   a. Search for your specific Candidate Pool, or
   b. Type part of the name of your Candidate Pool and click enter on your keyboard to narrow down your options.

Add Pool to Favorites

1. To easily find your Candidate Pool in the future, click the "pancake" (three bar) button next to the title of the Pool > Favorite > Add. It will then be in the favorites list of the Candidate Pool menu.

Add to Candidate Pool

From a Requisition

1. In a normal requisition, if you find Candidates that you wish to add to your Pool, do this …
   a. Click the box to the left of their name.
   b. Click related actions (three dots) button at the bottom of the screen and select "Add to Pool".
   c. Select the Candidate Pool name and click OK.
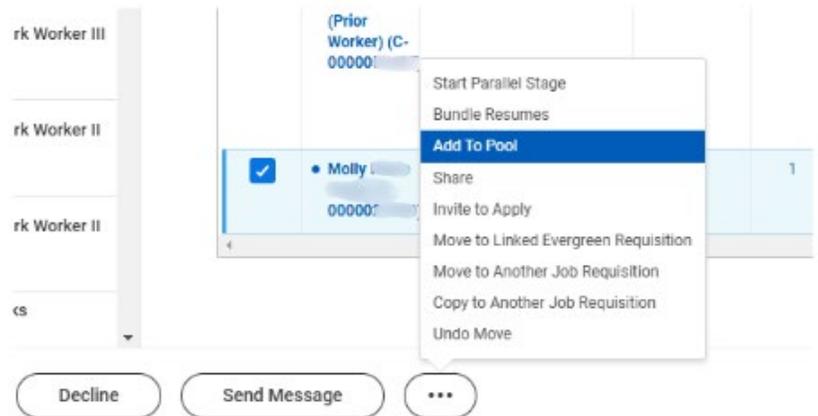
From Candidate Profile

1. Add a Candidate to a Pool from their Candidate profile.
   a. Click Actions in the blue menu > Candidate Actions > Add to Pool.
   b. Select the Candidate Pool name and click OK (screenshot below).
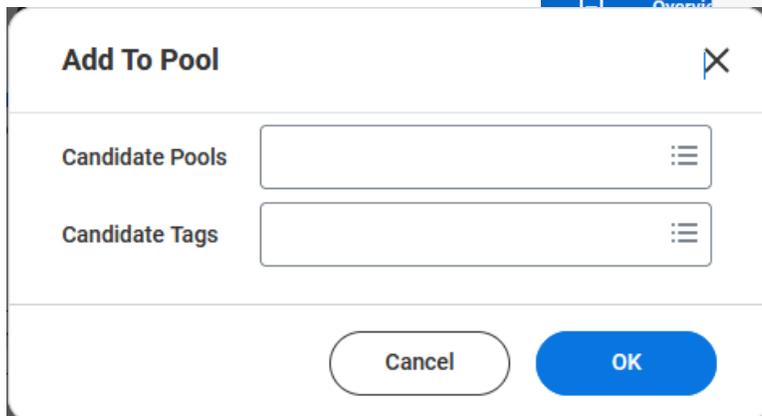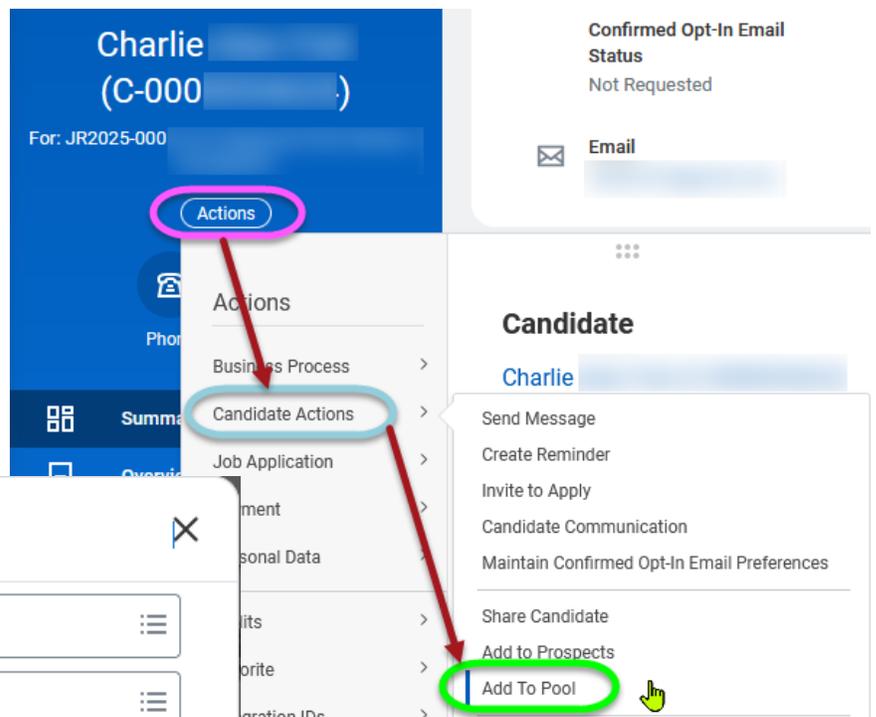
Add Tags to Candidate Pool from Candidate Profile

1. You can use Candidate tags which help remind you about the candidates' skills and can help with filtering your Candidate Pool list later.

View and Share and Message Candidates from the Pool

1. You can view and share Candidates from the Candidate Pool.
2. You can also message Candidates from the Pool.