Non-Posting Manager Process

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Introduction

This user guide explains the accessibility for the Non-Posting Manager role. This user has access to manage applicants within their assigned business unit(s) or assigned job listing(s). They do not have job posting abilities.

Home Page

You will be taken directly to your default homepage. Select the different icons across the top and in the **Gear icon** to navigate through the system.

Applicants

In this section you are able to **view, status, manually add, edit** and **add notes** to applications for jobs in your assigned department(s).

Search for applicants using the **All Applicants** tab or the **Applicants by Job** tab. Use the drop-down menus to filter which applicants you view or to determine how applicants are sorted. You can change any filter criteria and click **Filter** to update the results. Active, qualified Applicants for the last 90 days will show by default. By clicking the **Show Sent Emails** box, you can view which email templates have been sent to the applicants displayed. Status applicants individually, or en masse, from this screen.

Using the **Applicants by Job** tab allows you to review applicants by Job. Click **View** to open a dashboard for a specific job. Check the **Show Conversion Data** box to display conversion percentages for each job.

Click the Job Title or click the **View** button to the left of the job listing to view applicants. Use the dropdowns to filter which applicants you view or to determine how applicants are sorted. Use the **Add Applicant** option to manually add an applicant to the job, if you have been granted access to do so.

Click **Action**>**View** to go into an individual applicant record.

1. Applicant Filter:
Use this section to filter results, similar to filtering on the main applicant pages. Adjust the filters and click the **Filter** button.

2. Applicant Profile Information:
This section shows the applicant's contact information. Click **(edit)** to edit the applicant's profile information. This will change the information for EVERY application for this applicant.
If enabled, **choose a star to rate the applicant**

3. Application Information:
This area will look different, depending on the features enabled on your account.
Click on the tabs and labels to navigate through the application information.

If any integrations are enabled on your account, you will be able to click on the tabs and initiate other functions like background checks, assessments, onboarding, etc.

4. Action Buttons:

When viewing the application, you will find buttons at the upper right to do different tasks.

- **Follow:** This feature allows any user to "follow" an application. Users who follow an application receive an email notification whenever another user updates the status or makes notes on that application.
- **Send Message:** Text or Email the applicant.
- **Add Note:** Add a note on the application, or add a note and change a status simultaneously.
- **Print:** Print the application.
- **Action:** Includes a variety of other actions you can do with the application record, some features are optional.

5. Application Status:

You can status an individual application using the **Application Status** drop-down menu. If you hover over any given status, and if the status has an assigned description, the description will appear to help you determine the appropriate status selection.

6. Application Tags:

Application tags are a way to quickly see pertinent information about an application at a glance. Tags appear as colored bubbles and include Notes, Messages, specific Integrations, completing an App Invite, etc.

7. Timeline:

This area tracks any changes to the application, including notes, actions and emails/texts sent. There are 3 different views of Timeline/Other Applications. An Admin user can contact the Support Team to change the view for all users in the organization.

8. Other Applications:

This area displays any other applications this candidate has submitted.

9. Help Center:

There are 3 different ways to use the **Help Center** to quickly find answers to your questions.

- **Need Help?**: Begin typing any word or phrase to search our entire Help Center.
- **Common Questions**: Click this button to see a filtered list of commonly searched articles based on the page you're on.
- **Featured Articles**: Click any of the featured article buttons to see the most commonly searched articles based on the page you're on and your user type.

Review the **How do I process applicants? FAQ** for more information.

Link to Job Info

An arrow icon is displayed next to the Job Title within the application record. This enables you to quickly access details from the **Job Listing** and **Requisition** (if applicable).
Hover over the arrow icon to see basic details from the **Job Listing**.

Click the arrow icon to open a separate preview page with the **Career Site Description** and **Job Details**.
If the job listing is linked to a Requisition, an additional section called **Job Requisition Details** section is also displayed.

Loan Processor I - American Fork, UT

Career Site Description

Bank of Mt. Bankerton, one of Utah's premiere community banks, is hiring a Loan Processor in the American Fork office.

Responsibilities: Provide clerical and administrative support needed to process and close customer loans; prepare loan documents and book loans when signed and returned; file loan documents with appropriate agencies; process construction draw checks; follow-up with the loan officer to determine status.

Requirements: One to two years of similar or related experience.

We offer competitive pay based on experience, excellent full benefit package, paid time off and holiday pay.

Schedule: Monday-Friday, 8am – 5pm.

Equal Opportunity Employer Female/Minority/Disability/Veteran

Job Details

Job Location: American Fork, UT

Start Date: 08-Oct-2015   **End Date:** 08-Nov-2015   **Number of Positions:** 1

Pay Rate: Competitive   **Pay Type:** Hourly   **Benefits:** We offer competitive pay based on experience excellent full benefit package paid time off and holiday pay.

Department: Central Loan Processing   **Classification:** Pizza Party   **External Application Setup:** Main Application   **EEO Job Category:** Administrative Support Workers

Job Requistion Details

Hiring Requisition Form	
Addition to staff:	No
Replacement:	Yes
If yes, who is being replaced?	
Salary Range:	14.10 starting
Specific Work Schedule:	M-F 8-5
Can these requirements be assigned/performed by another area? Why/why not?	No, position requires preparation of loan documents.
Education Level:	High School Degree
Prior related experience:	Prior Loan experience preferred. See above description

Job Cost/Benefit Analysis	
Measurement Description #1 - Is a full-time or part-time employee needed?	Full-Time
Hours per week?	40
Measurement Description #2 - What job responsibilities/work load is required to justify the FTE in addition to cover peak time?	Growth of the Bank.
Measurement Description #3 - A. Review existing reports to measure current needs from past years trends. Have the needs of this current position increased or decreased and if so, how does that justify the hiring for the position? **(See sample measurement criteria for report information. Please hold the CTRL button and click here to open in a new window.)**	Analysis was completed and due to the increase in loan production it is recommended that we add to our department.

Increase in Staff Only	
Description of additional duties and outputs:	
Summarize benefit or advantage of this hire to your department and the bank.	
Costs:	
(One year salary, benefits, supplies, etc.)	
Estimated total annual cost:	

Jobs

In this section, you are able to view the job listings in your assigned **department(s).**

Click on the gray **Action** button to the left of the Job Title and select **View** to open the job description that applicants see when applying for jobs. You can also use the **Action** button to the left of the job listing to View Applicants, Manually Add Applicants (optional), or to run Source, Status or Job Questions Reports. Check the **Show Conversion Data** box to display conversion percentages for each job. Use the dropdowns to filter which applicants you view or to determine how applicants are sorted.

Use the **Add Applicant** option to manually add an applicant to the job, if you have been granted access to do so. You can also find mass update options at the bottom of the page. Click **Action** and **View** to open up an individual's application.

Click on the **All Applicants** tab to view and status a list of all applicants for all of the job postings in your assigned department(s). Use the dropdowns to filter which applicants you can view, click the refresh button to view these applicants.
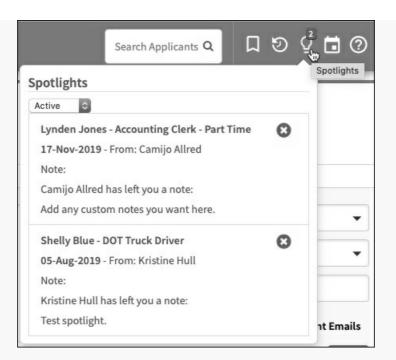
My Account

In this section, you are able to view and edit your account information. If you would like to update/change your username and/or password for the isolved Hire system you can type in the new username/password in the directed field(s) and then click on **Save Changes.**

You can also set your default landing page/s in this area. For more information, review the **Editing My Account/Profile** user guide.

My Spotlights (optional)

The **Lightbulb** icon will show any applicants that have been **spotlighted** for you by other users in your organization. You can view **active** and/or **inactive** spotlights by clicking the arrow next to **Active.** Click on each listed applicant to open their application. (If you do not have Spotlights turned on, but would like to try using them, contact your Admin and they can request that feature be turned on.)

Incomplete Apps Tab (optional)

Admin users can limit access to the **Incomplete Apps** tab for each manager. Assigned users do not have access to view the Incomplete Apps tab. If you have access to this tab, review the Incomplete Applicants Tab User Guide for more information.

Communication Inbox

Review the Communication Inbox user guide or video for information on this feature.

Requisitions (optional)

If you have Requisitions enabled on your account, refer to the Creating Requisitions user guide for additional information.

Common Questions

Why would I make a user a Non-Posting Manager?

Non-posting managers are the most common user type. They are often hiring managers who make input on hiring decisions, but do not post jobs or have access to do so. Managers have access to applications based on departments or job listings they have been assigned.

Can I restrict a manager to access by job listing instead of departments?

Yes. An Admin user can request this feature be enabled on your account. Refer to the user guide on Assign Managers by Job, Instead of by Business Unit for more information on this feature.

What is the difference between a Non-posting manager and an Assigned User?

Both non-posting managers and assigned users, as well as admins and posting managers, essentially have the same access to applications. Once they pull up an application you will see similar options in Actions, Timeline, and application information. A manager's access is different based on how many applications they have access to, as they are restricted based on department. An assigned user only gets access to applications they are specifically assigned.

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