



Sci.bio Recruiter Guide to Kortivity

Updated July 2021

Overview

Welcome to the Sci.bio Recruiter Guide to Kortivity! Sci.bio uses the ATS, [Kortivity](#), (historically also referred to as “Scibase”) to manage our candidate and client database. As a member of the recruiting team, you will use Kortivity to add and view potential candidates, change the candidates’ position in the recruitment process, add job listings, communicate with clients and candidates, and more!

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Logging in to Kortivity

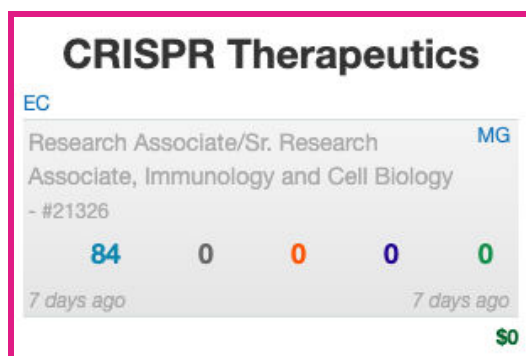
To log into Kortivity, go to the [Kortivity](#) website. Then, using the login information provided to you by a member of our administrative team, enter your username (i.e. your email) and your temporary password (this will be given to you via our team; you can then change it after successfully logging into Kortivity). The login screen will look like this:



Understanding the Home Screen

The Home Screen to Kortivity displays all companies Sci.bio is currently recruiting/consulting along with all open/drafted positions for each client. It will appear as such:

Each open/drafted role will have the position title, job number, a flowbar to indicate the recruiting stage, the recruiters' & account managers' initials, a time period of when the role was opened and the last time it was worked on/updated. The Account Manager's initials is displayed in the Upper Left-Hand corner of the company's box (CC: Carina Clingman). The Recruiter's Initials are displayed in the Upper Right-Hand corner of each Open Role (CC: Carina Clingman). Underneath the Hiring Manager section you will find a Numerical Flowbar, which denotes the number of candidates at each stage of the recruiting process.



Blue: **New and/or Contacted Leads**

Black: **Candidates Presented to Hiring Manager**

Orange: **Candidates Interviewing**

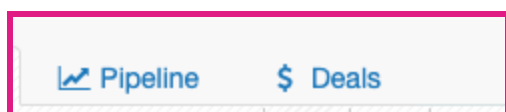
Purple: **Candidates Offer Extended**

Green: **Candidates Hired**

Underneath the Numerical Flowbar will be two sets of dates. The date to the left is when the job was opened. The date to the right when the job was last worked on/updated. If you see a position in the **Color Gray**, it means that the position is in "Draft Mode" (as seen in Crisper). If the position is clear (as seen in Tango), it means the position is in "Open Mode". The difference between these dwells with the marketing settings. When a position is left in "Draft Mode" you will not see it posted on our Sci.Bio website under Job Search. Leaving some positions in Draft Mode can be helpful if the company is doing a discreet search or if the Job Description is not complete but you wanted to begin sourcing. (Page 11)

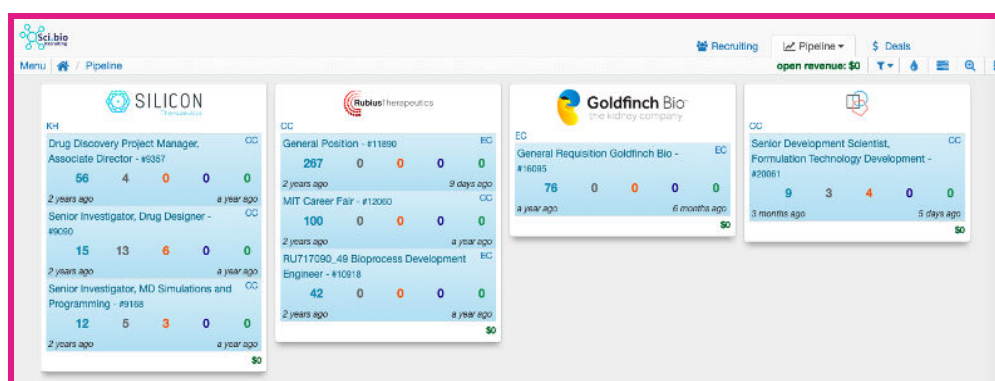
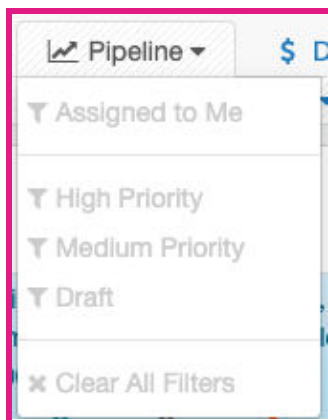
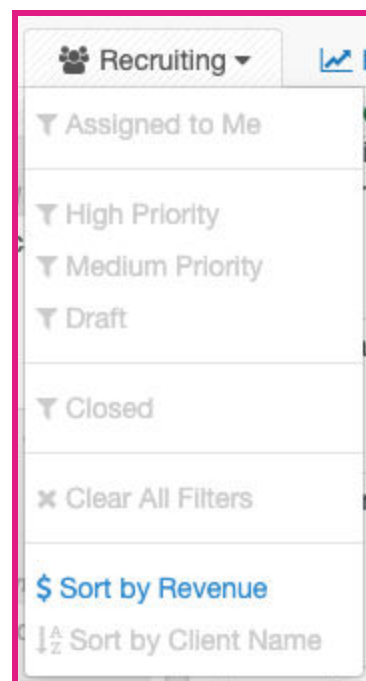
Tabs (Upper Right-Hand Corner)

The Three Tabs in the upper right-hand corner of the Home screen include the “Recruiting” Tab (the Home Screen - Page 2), a “Pipeline” Tab and a “\$ Deals” Tab. When you click the downward pointing arrow for the ‘Recruiting’ Tab, a dropdown menu will appear. This menu will allow you to alter the display of the home screen. You can filter roles by “Assigned to Me”, Priority, Draft, or Closed. After playing around, you can clear all filter set and return to the original home screen settings.



Next to the Recruiter Tab are the two other Tabs: “Pipeline” and “Deals”.

The Pipeline Tab allows you to view Open Positions that could be coming up from a Client, but we are not currently working on. This tab also has a Drop-Down Menu similar to that of the Recruiting Tab- enabling you to organize positions by Priority, Draft Mode, or Assignment.



Deals

The “Deals” Tab enables you to view the number of Deals that are in the pipeline between Sci.bio and their Clients. This is helpful from a Business Development perspective, and does not need to be consulted by recruiters in their day to day work. The Deal history with each client can also be seen on the “client” page.

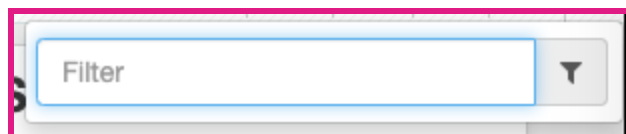
For Business Development team members, the Deals tabs should hold the pipeline of all the clients you are actively working to close. NOTE: This is for CLIENTS we are hoping to bring in, not CANDIDATES we are courting (those can be tracked through Planner tasks or Talent Pools).

As your client contact moves through the process from “not contacted”, please update the deal to show where they are in the process, until they become “Active Clients” and have open reqs on the home page.

Task Bar (Upper Right-Hand Corner)



The Task Bar in the Upper Right-Hand Corner of the home screen allows you to do multiple things relevant to organization. The **Open Revenue** box pertains to the “Deals” Tab, and can be ignored by



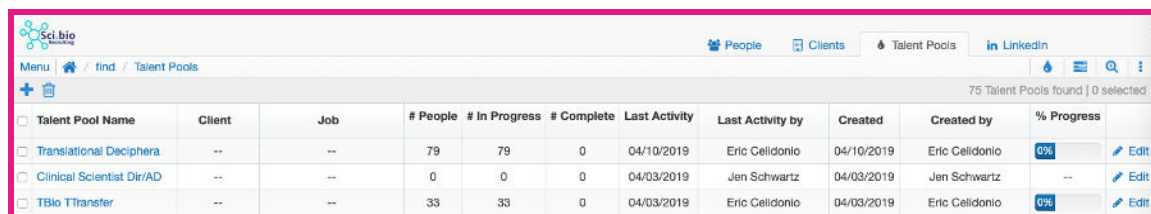
most recruiters. The **Blue Funnel** with the Downward Arrow is the “Filter this Page” Button. When you click this Button, a Drop-Down Fill in the Blank Box will pop up, enabling you to filter the Home Page based on which Client or Open Role you wish to view. The **Blue Water Droplet** Button allows you to “View All Talent Pools.” The **Blue Progress Bar** Button allows you to “Add Activity to Your Planner” and is there to help you organize your schedule. The **Blue Magnifying Glass** Button allows Recruiters to Search for anything in Kortivity. To do this, a Search Bar will appear underneath the button on the screen. This is helpful when searching for a role that’s been closed, a past client, a prospect or candidate. The final Button on the Task Bar is **Three Blue Vertical Dots** that allow you to Perform various Actions, Jump to Settings, What’s New, and the Planner, and view your Recent History.

Talent Pools

When you click this water droplet Button, it will bring you to all created 'Talent Pool(s)'. An overview of talent pools can be found here:

<https://kortivity.zendesk.com/hc/en-us/articles/360013090672-Talent-Pools-Overview>

Any user can create their own talent pools by clicking on the "+" button (left hand corner under Menu). Talent pools are helpful in various different ways. If a future client contacts you (the recruiter) looking for a high level profile type, you can create a talent pool and present it as a talent map in



The screenshot shows the Sci.bio Talent Pools interface. At the top, there's a navigation bar with 'People', 'Clients', 'Talent Pools', and 'LinkedIn'. Below this is a search bar and a 'Menu' button. The main content area displays a table of talent pools. The table has columns for 'Talent Pool Name', 'Client', 'Job', '# People', '# In Progress', '# Complete', 'Last Activity', 'Last Activity by', 'Created', 'Created by', and '% Progress'. There are three rows of data visible: 'Transitional Deciphera', 'Clinical Scientist Dir/AD', and 'TBio TTransfer'. Each row has a checkbox on the left and an 'Edit' button on the right.

Talent Pool Name	Client	Job	# People	# In Progress	# Complete	Last Activity	Last Activity by	Created	Created by	% Progress
<input type="checkbox"/> Transitional Deciphera	--	--	79	79	0	04/10/2019	Eric Celidonio	04/10/2019	Eric Celidonio	0%
<input type="checkbox"/> Clinical Scientist Dir/AD	--	--	0	0	0	04/03/2019	Jen Schwartz	04/03/2019	Jen Schwartz	--
<input type="checkbox"/> TBio TTransfer	--	--	33	33	0	04/03/2019	Eric Celidonio	04/03/2019	Eric Celidonio	0%

your initial meeting. You can use Talent Pools to collect candidates with a specific skill set, either for a confirmed upcoming need, or to look back on for future roles. Sourcers can collect potential candidates for open roles here, and connect the talent pool to the job so that the recruiter can review and offer feedback without cluttering the req itself with passive candidates who may not be a good fit. Once you've created your talent pool, you can send all leads to a specific job. After creating a talent pool you can compile a list of leads for either a specific upcoming job, current job or particular category.

There are a few different methods in adding people to a talent pool. One method is to click on the talent pool you created and click the "Add Person" button. This allows you to manually add people from our database. Another is to compile a CSV file and tell the system to add call prospects to a talent pool.

Settings

In settings, you are able to add in your email signature (please match the format in your sci.bio email) and edit account preferences.

Account Settings

First Name
Shereen

Last Name
De Assuncao

Email Address
shereen@sci.bio

Time Zone
US/Eastern

Account Preferences

Your initials for use as the code for MPC campaigns
SD

Initial landing page after login
Firm Recruiting Tab

Default Tab In Person Quick View
Profile

☐ Default all Scorecards to My Personal View
☐ Receive on all out-of-hour emails I send

eMail Signature

Type something

Planner

Planner is a great tool to help keep your tasks organized in one place. This is most helpful for calls and follow-ups that you need to schedule further out, i.e. a 1 month check in with a contractor, or when a client requests a call back “after year end”.

Click the “+” to add an activity and a box will pop up.

Menu: user: Shereen De Assuncao: planner

Dashboard Planner Activity Bookmarks Settings

0 activities found in 0.35 seconds | 0 selected

search activities by keyword Search

Summary	Created	Scheduled Date	Scheduled Start Time	Scheduled End Time	Completed Date	Person First Name	Person Last Name	Person Phone	Person eMail	Person Location	Job Title
There were no activities matching your filters! Please adjust your filters or create a new activity here											

Add New Activity

Assign to someone else

☐ Activity Summary

T
Task

P
Normal

Scheduled for

enter start time

enter end time

Link a person

Link a job

Link a client

Add a note

☐ schedule this activity on calendar
☐ add another activity just like this one

Cancel
Add Activity

Make sure you fill in as much information as you can.

- Detailed summary information
- What kind of task it is (call, task, etc)
- The date it is scheduled for
- Link at least to a person in Kortivity; ideally, also a client company and/or open job.
 - Planner activity is also visible on candidate application views from reqs, as well as on the relevant person records

After adding the task, it will appear on your screen in the list. Note that you can show/hide calls, tasks, all activity by clicking each of the icons. You can also set the date range or filter by priority/overdue.

Summary	Created	Scheduled Date	Scheduled Start Time	Scheduled End Time	Completed Date	Person First Name	Person Last Name	Person Phone	Person eMail	Person Location	Job Title
Meet with HM for more details	06/04/2021	06/07/2021				Allison	Ellsworth		allison@sci.bio		Test-RA

To **complete the task**, click on the title to open the activity and click the checkmark next to the summary to complete the activity. You can also create a follow up activity by selecting “create another task like this” at the bottom of the screen.



Clients

All current clients are displayed on the Home Screen. Each client has a number of open or drafted positions, all of which are found under their title. To further investigate each role, click either on the client's title or the specific role you wish to view.

Client	Open Positions	Drafted Positions	Completed Positions	Other	Time Ago
Translate Bio	74	1	0	0	2 months ago
Associate Director/Director, DMPK	209	0	1	0	2 months ago

If you click on the client's title (such as “Translate Bio”) it will lead you to all of Translate Bio's roles (as seen below).

Role	Type	Engagement	Hiring Manager	Client	Interview	Other	Total	Hired	ASAP	July	August	Months
Associate Director/Director Regulatory Affairs CMC	RPO	1	1	1	1	1	1	1	1	1	1	1

Click on the tabular button “Jobs” to have a different view of all jobs or click directly on the job to directly you wish to work on.

Open Jobs

If you click on the tabular “Jobs” the screen will appear as below. Here we see a different view of all open/drafted jobs for this client.

The screenshot shows the Sci.bio Jobs page. The top navigation bar includes 'Jobs', 'Snapshot', 'Hiring Forecast', and 'Client Info'. The 'Jobs' tab is selected. The page displays three job listings:

- Sr. Scientist/Sr Engineer Technical Transfer** (Job # 20384, 0 of 1 filled, 29 Hartwell Avenue, Lexington, MA, Full Time (Salaried)). Hiring Manager: Not Set. Status: 144 New, 1 First Contact, 1 On Hold, 0 Phone Screen, 0 Account Manager Review, 1 Hiring Manager Review, 0 Client Approved, 1 Interview, 0 Offer Extended, 5 Candidate Disqualified, 198 Declined, 0 Hired. 5 months ago.
- Sr. Scientist, Analytical CMC** (Job # 20386, 0 of 1 filled, 29 Hartwell Ave, Lexington, MA, Full Time (Salaried)). Hiring Manager: Not Set. Status: 51 New, 2 First Contact, 2 On Hold, 0 Phone Screen, 0 Account Manager Review, 0 Hiring Manager Review, 0 Client Approved, 0 Interview, 0 Offer Extended, 0 Candidate Disqualified, 0 Declined, 0 Hired. 5 months ago.
- Scientist/Engineer Technical Transfer** (Job # 20889, 0 of 1 filled, 29 Hartwell Ave Lexington, MA 02421, Full Time (Salaried)). Hiring Manager: Not Set. Status: 88 New, 0 First Contact, 0 On Hold, 0 Phone Screen, 0 Account Manager Review, 0 Hiring Manager Review, 0 Client Approved, 0 Interview, 0 Offer Extended, 0 Candidate Disqualified, 0 Declined, 0 Hired. 4 months ago.

You can select which job you'd like to view to see even more information about/update a role:

The screenshot shows the detailed view of the 'Sr. Scientist/Sr Engineer Technical Transfer' job (Job # 20384). The page includes a 'Filter' dropdown, 'Status', 'Application Date', 'Activity', 'Rating', and 'Name' tabs. The 'Application Date' tab is selected. The job details section shows the job title, location, and a list of candidates with their contact information and status. The 'Hiring Manager' section shows 'Not Set' for 'HR Contact' and 'Not Set' for 'Hiring Manager'. The 'Recent Activity' section shows a green plus icon and the text 'Add Activity'. The 'Talent Pools' section shows 'No talent pools'. The 'Attachments' section shows a link to 'Translate Bio Employee'.

By clicking on the job, you can directly see which prospects have been contacted and which ones have declined the opportunity. Whenever a prospect applies or is added to the job, he/she will appear as “New”. If a prospect has been contacted, you will manually update the prospect’s status to “First Contact”. If a prospect responds and a phone screen is set up, the candidate will be updated to “Phone Screen” - so on and so forth.

Let’s manipulate some of the information seen/hidden:

If you click on the “140 First contact”, it hides all the prospects that have (only) been contacted. You will now only see: New, On Hold, Phone Screen, Hiring Manager Review and Interview.

If you only want to see all the candidates that have been disqualified click on “New”, “First Contact”, “On Hold”, “Phone Screen”, “Hiring Manager Review” and “Interview” to hide all prospects logged into these sections. Now click on “Disqualified Candidate”. You will now only see the disqualified candidates:

If you want to see which candidates have applied and been disqualified click on the smiley face:

The screenshot displays the Kortivity interface for a job listing titled "Sr. Scientist/Sr Engineer Technical Transfer" (#20384 - Lexington, MA). The top navigation bar shows various status filters: New (3), First Contact (140), On Hold (2), Phone Screen (1), Account Manager Review (0), Hiring Manager Review (1), Client Approved (0), Interview (1), Offer Extended (0), Candidate Disqualified (5), and Hired (198). The "Candidate Disqualified" filter is currently selected, showing 5 candidates. Below the filters, a list of candidates is displayed, including Elma Ferić Bojic, Chris Ravin, Kameron Kilchrist, and Niranjana Ghimire. Each candidate profile includes their name, title, contact information, and a status indicator (e.g., "Prior Status: New"). The right sidebar contains sections for "Hiring Manager" (Not Set), "HR Contact" (Not Set), "Recent Activity" (Add Activity), "Talent Pools" (No talent pools), and "Attachments".

Here we now only see the candidates that have applied and been disqualified. If we click on the first candidate “Elma”. It will open to her profile in our database for this client:

Here we can see this candidate's current and previous positions, their number, email and

The screenshot displays the Sci.bio Recruiter interface for candidate Elma Ferić Bojic. The top navigation bar includes a menu, home icon, and breadcrumb trail: Translate Bio / Sr. Scientist/Sr Engineer Technical Transfer (20384) / candidates / Elma Ferić Bojic. The main content area is divided into sections: Candidate profile (with a placeholder image, name, location, and star rating), Current/Previous positions, Education, Open to, Work Auth, and Tags. Below this is the CONTACT INFO section with phone, email, and social media links. A timeline shows the hiring process from New Applicant to Hired. At the bottom, there are three buttons: Candidate On Hold, Candidate Declined, and Disqualify Candidate. On the right sidebar, there is a Recent Activity section with a note from KH on 05/29/2019, an Attachments section with resume and cover letter files, and a Commute section with a map showing the route from Arlington, Massac... to 29 Hartwell Ave, L... with a 19 min drive time.

LinkedIn profile. On the left side, under "Recent Activity" we can see Katja Helenius (KH) left a note on 05/20/2019 stating the candidate is "Not local, overqualified". To add more notes click the "+" button. (This note was likely from when Katja disqualified this candidate). Under "Attachments" we can find the candidates Resume. To see more, scroll further down to see how they applied and other information.

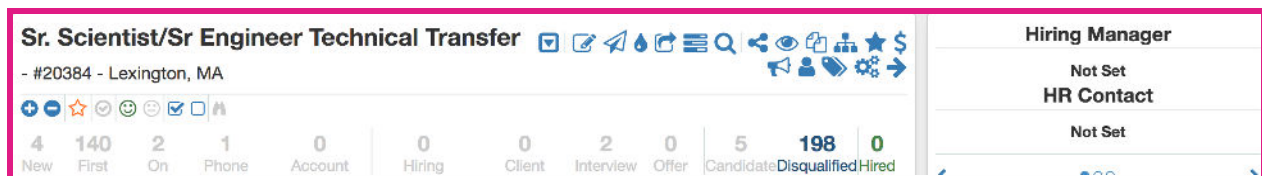
This screenshot shows the bottom portion of the Sci.bio Recruiter interface for candidate Elma Ferić Bojic. It features the same timeline and action buttons as the previous screenshot. Below the buttons, it displays the Reason: Other | Prior Status: New. The Applied section shows the date 06/17/2019 and Candidate Type: Active. The Submitted By section indicates Applied Online via translate.bio. The Elma's Recruiter is Katja Helenius, and the Job Recruiter is Danielle Matthews Cox. The Current Salary section shows Base: -- | Bonus: -- | Total: -- | Hourly: --. The Last Activity section shows 6 days ago and a Candidate Link: https://k7y.pl/c/uEITq. The Client Comments section is also visible at the bottom.

Job Marketing Settings and Job Details

Return to the role in order to view the job details and marketing settings.



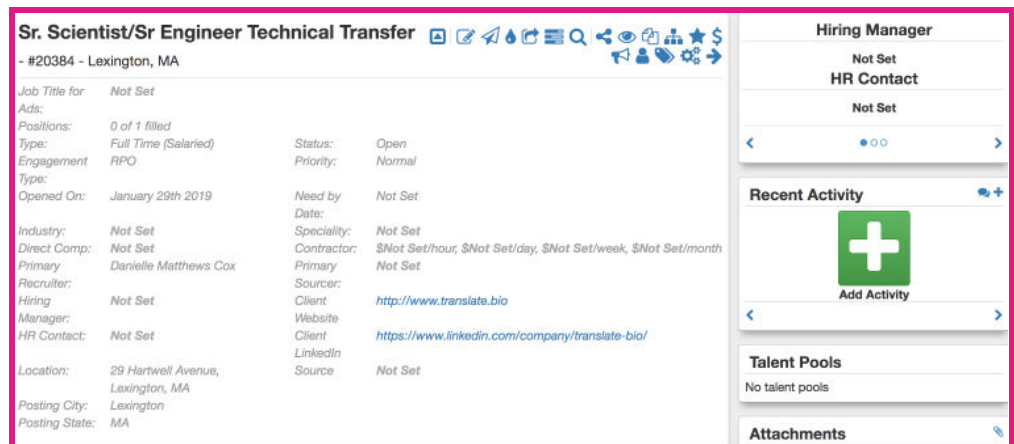
To then view the job description/details click the downward arrow:













You can then see the following drop-down menu to the right.

Here we can see the job details - when it was opened, the primary recruiter, location of the position, job summary, job responsibilities, etc.







Re-click the arrow to hide this information again.



To view the marketing settings of the position click the horn:

Sr. Scientist/Sr Engineer Technical Transfer          

- #20384 - Lexington, MA








     

4	140	2	1	0	0	0	2	0	5	198	0
New	First	On	Phone	Account	Hiring	Client	Interview	Offer	Candidate	Disqualified	Hired






Hiring Manager
Not Set
HR Contact
Not Set

Lexington, MA
Posting City: Lexington
Posting State: MA

Client Overview








      

—

Type something 0

Job Summary

—

The screenshot displays the 'Marketing Settings' for a job titled 'Sr. Scientist/Sr Engineer Technical Transfer' (#20384 - Lexington, MA). The settings are organized into three rows, each with a logo, a description, and an 'Enabled' button with a dropdown arrow.

Logo	Description	Status
Sci.bio	Your Scibase job feed that may be embedded within your corporate website.	Enabled ✓
Translate BIO	A Scibase job feed that may be embedded within your client's website.	Enabled ✓
indeed	Since 2004, Indeed has given job seekers free access to millions of jobs from thousands of company websites and job boards. As the leading pay-for-performance recruitment advertising network, Indeed drives millions of targeted applicants to jobs in every field and is the most cost-effective source of candidates for thousands of companies.	Enabled ✓

On the right side of the interface, there are several sections: 'Hiring Manager' (Not Set), 'HR Contact' (Not Set), 'Recent Activity' (Add Activity button), 'Talent Pools' (No talent pools), and 'Attachments' (Translate Bio Employment... 4 months ago).

The marketing settings show where the job has been posted through Kortivity. For this position it has been posted on our Sci.Bio job search website, Translate Bio's career website, Indeed and a couple different places. We can tell where the position has been posted by the green "Enabled" button. To disable the posting click the button and it will appear as "Disabled". Each company prefers different marketing settings depending on the contract and job type. **Please note that if the position is in "Draft Mode" the marketing settings are automatically disabled. Every other setting automatically posts to our website unless you make changes.**

Client Information Tab

Going back to the Client view, you will see other tabs with different information along the top right side. The far right is Client Information. This view provides an overview of all client information, including linked contacts, placements, and deals.

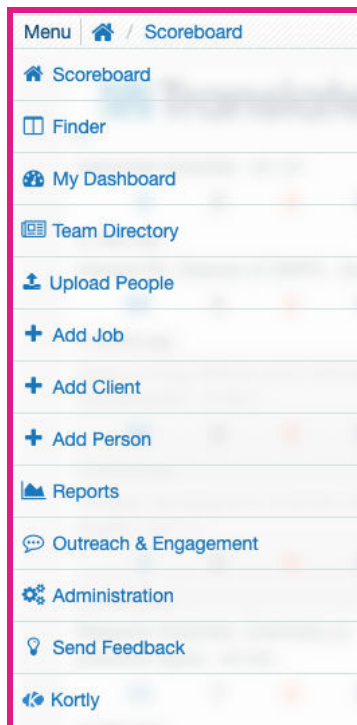
The screenshot shows the 'Client Information' tab for 'Translate Bio'. It displays a table with columns for Job Title, City, State, Engagement Type, Hiring Manager Review, Client Approval, Interview, Other Extended, Total Active, and Hiring Forecast. The hiring forecast is broken down by month (ASAP, July, August) and a total for the next 3 months.

Job Title	City	State	Engagement Type	Hiring Manager Review	Client Approval	Interview	Other Extended	Total Active	Hiring Forecast
Associate Director / Director	Lexington	MA	FPO	1	1	1	1	1	ASAP: 1, July: 1, August: 1, Total Next 3 Months: 3
Associate Director / Director	Lexington	MA	FPO	1	1	1	1	1	ASAP: 1, July: 1, August: 1, Total Next 3 Months: 3
Associate Scientist (PhD)	Lexington	MA	FPO	1	1	1	1	1	ASAP: 1, July: 1, August: 1, Total Next 3 Months: 3
Director / Bio Analyst	Lexington	MA	FPO	1	1	1	1	1	ASAP: 1, July: 1, August: 1, Total Next 3 Months: 3

Person Records

When you search for a person through the Finder feature, or click on their name from the candidate record, this brings you to the Person page. Similar to the Client record, this is an overview page that will show all the jobs and talent pools the candidate is attached to, all activity for that person, and all tags and attachments for this record.

Menu Sidebar (Upper Left-Hand Corner)



When you click the “Menu” Button in the upper left-hand corner of the screen, a Drop-Down Menu will appear.

Click **“Scoreboard”** to view the Home Screen with Clients and Open Roles.

Click **“Finder”** to search Kortivity for Applicants and Clients.

Click **“My Dashboard”** to view Applicant Pipeline, Interviews, & More

Click **“Team Directory”** to view the Sci.bio Team members.

Click **“Upload People”** to add Candidates.

Click **“Add Job”** to add a Role for your Company.

Click **“Add Client”** to add a Client to Kortivity.

Click **“Add Person”** to add an Employee to Kortivity.

Click **“Reports”** to view Applicant Pipeline Related Information.

Click **“Outreach & Engagement”** to view Reach & Contact

Click **“Administration”** to Manage Users, Questions, Tags, etc.

Click **“Send Feedback”** to Send Feedback about Kortivity

Click **“Kortivity”** to see Information about Kortivity

The “Scoreboard” Button

The “Scoreboard” Button is the screen you see when you initially log into Kortivity. As previously stated on Page 2 under “Understanding the Home Screen,” this is where you will see all active

Clients and their corresponding Open Roles. To read more, please go to “Understanding the Home Screen” Section.

The “Finder” Button

Using the “Finder” Button, you can search the Kortivity for any candidate or client user. When clicking this Button, this screen (shown above) will appear. The blue options listed at the top of the screen are categories to search by. To enter search information, click on the desired category and type in your search words and then press the **Blue Check Mark** to enter your

search word into the Query. Once your term is selected, you can choose to include or exclude that term in each search by changing the “Must Have” green check mark to “Should Have” or “Cannot Have.”

Once you have chosen what terms you want to include or exclude in your search, they will appear in the bottom left-hand corner of the screen. To remove a term, press the **Red X** next to the term. To run the search on Kortivity, press “**Run Query**” and the results will appear at the

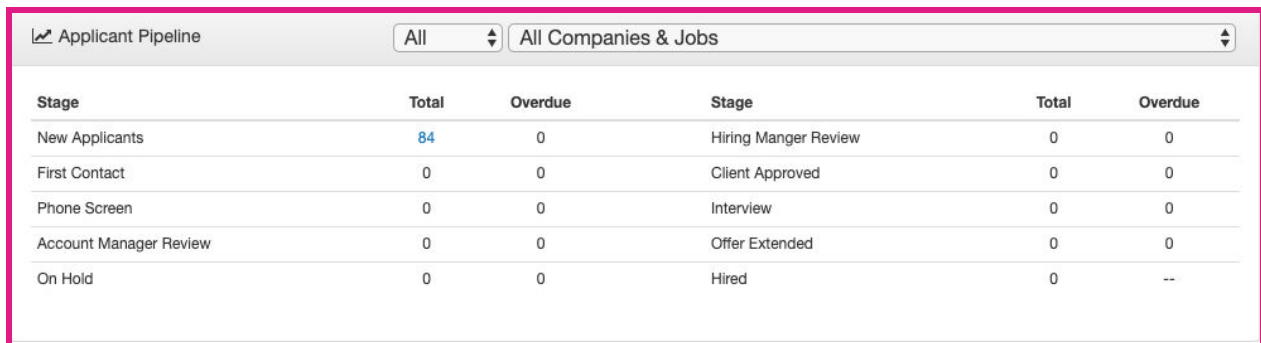
bottom of the Search screen. results can be saved using “**Save Query.**”

Old searches can be pulled up again with “Load Saved Query.” Additionally, you can reset a search with “Clear Filters.” To change the status of all search results, click the notepad and pencil tool located in the bottom left of the above image. To submit all search results to a job,

click the right arrow image located in the bottom left of the above image. Search results can also be manually selected and unselected.

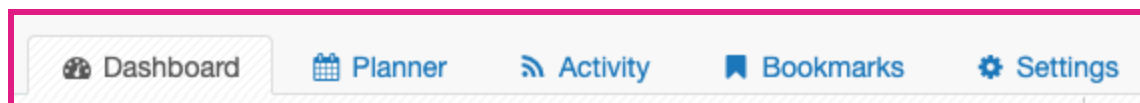
The “My Dashboard” Button

When you click the “My Dashboard” Button, you get a quick view of the Applicant Pipeline (pictured below). More specifically, this shows the number of Applicants at each stage of the Recruitment Process. At the top of the box is a Drop Down menu where you can sort Applicants by Company. This page also shows Upcoming Interviews scheduled, Active Candidates with Clients, and any Planner Activities that you have.

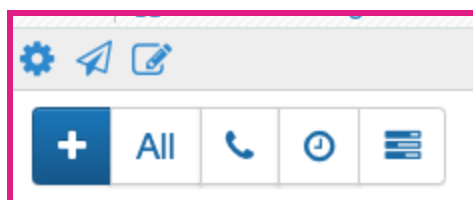


Applicant Pipeline					
		All	All Companies & Jobs		
Stage	Total	Overdue	Stage	Total	Overdue
New Applicants	84	0	Hiring Manger Review	0	0
First Contact	0	0	Client Approved	0	0
Phone Screen	0	0	Interview	0	0
Account Manager Review	0	0	Offer Extended	0	0
On Hold	0	0	Hired	0	--

In the Upper Right-Hand Corner of the Screen are a series of Tabs that include the “Dashboard” (as described above), “Planner,” “Activity,” “Bookmarks,” and “Settings.”



When you click the Blue “Planner” Tab, it shows you all Activities (Past and Present). You can



Sort and View Activities by Summary, Date Created, Scheduled Date, Scheduled Start Time, Scheduled End Time, Completed Date, Person’s First/Last Name, Phone Number, E-Mail, and Job Title. In the Upper Right-Hand Corner you will also find a series of Buttons. The Blue Gear

Button to the Left allows you to “Change Visible Columns.” The Blue Paper Airplane Button allows you to Send Bulk Emails and the Blue Pad with Pencil Button allows you to Update any Selected Activities. Below these three Buttons are a set of Five Buttons: the Blue Plus Sign allows you to add an Activity, the “All” Button allows you to view “All Activities,” the Blue Phone

Button allows you to organize activities based on Phone Calls, the **Blue Clock Button** allows you to sort Activities by “Appointments,” and the **Three Blue Horizontal Bars Button** allows you to sort Activities by “Task.” Next to this set of Buttons is a Search Bar that



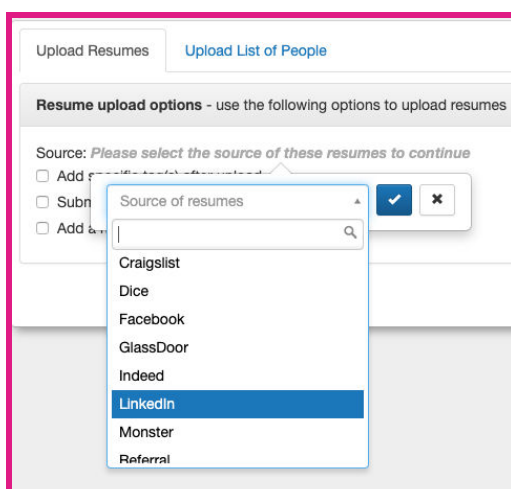
allows you to search Activities by Keyword. To the Right of the Screen is another set of Buttons that allow you to organize the Activities on your screen. The Three Buttons furthest to the Left allow you to sort Activities by Priority (the **Red Exclamation Point** sorts for “Top Priority,” the **Blue Bullseye** sorts for “Medium Priority,” and the **Green Downward Arrow** sorts for “Lowest Priority”). The Four Other Buttons to the Right of the screen also allow you to sort your Activities: the **Red Triangle** shows “Overdue” Activities, the **Blue Flag** shows “Planned” Activities, the **Green Circle with the Checkmark** shows “Completed” Activities, and the **Blue Filing Box** shows “Archived” Activities. When you click the “Select Period” Button, you can view Activities from a certain time period (i.e. Last Month, Last Week, Yesterday, or a Custom Range of Dates).

When you click the **Blue Activity Tab**, a screen with your recent activity will show up (i.e. email communications via Kortivity, Uploaded People, and any edits to Candidates’ statuses). The **Blue Bookmarks Tab** allows you to view any Applicants, Clients, or Open Positions that you have Bookmarked. The **Blue Settings Tab** allows you to change your Account Settings and Email Signature.

The “Team Directory” Button

The “Team Directory” button allows you to see all of the Sci.bio Team Members and their corresponding information. For example, you can view their Title, Sci.bio Email, Phone Number, Address, and their Online Status (i.e. when they were last online). The **Green Circle** next to their name indicates they are currently Online.

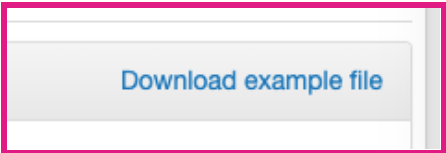
The “Upload People” Button

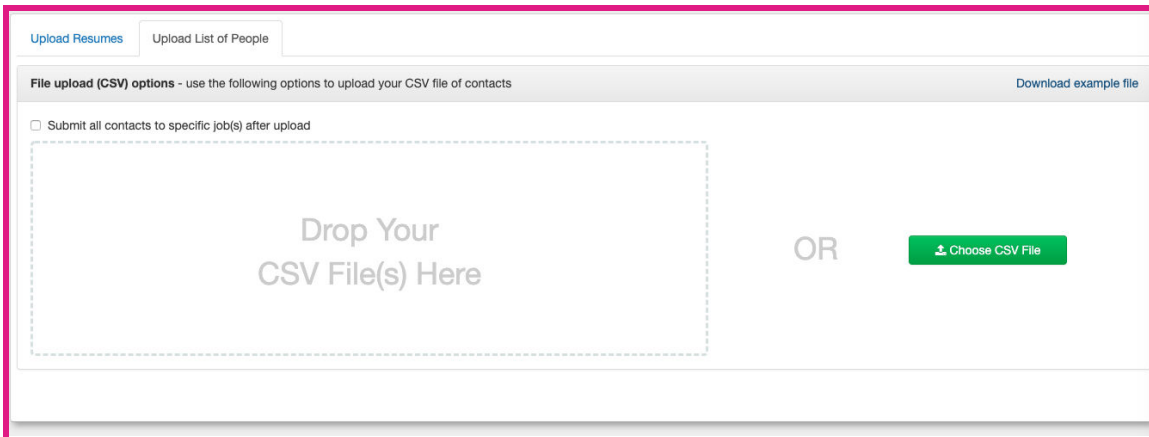


After selecting the “Upload People” Button from the Drop-Down Menu, three Tabs will appear.

Under the **“Upload Resumes”** Tab, input the Source of the Resume by clicking the line that says “Please select the source of these resumes to continue” and then select the source from the Drop-Down Menu (i.e. LinkedIn, Indeed, or Your Name). Below the Source of Resumes, you will see a list of Options. If you need to add any Specific Tags, submit the candidates to certain jobs, or add notes to the candidates, select those options **PRIOR** to uploading resumes. For example, if you want to add resumes to a particular job requisite, check-box “*Submit all to specific job(s) after upload*”. A drop box appears under and you fill out which job requisite you want all prospects sent to. Once you write the source and click the checkmark, a drag-and-drop box and green “Choose Resumes” button will appear. Add/Drag all resumes you wish uploaded. I always recommended double checking the system to ensure resumes were properly added.

Under the **“Upload List of People”** Tab, click the “Download Example File” document located in the top Right-Hand portion of the screen. A csv file will download. Once it is downloaded, click the file and it will open with Excel. In the Excel file will be the Example Applicant’s personal information (i.e. Full Name, Job Title, Contact Information).


 A rectangular button with a light gray background and a blue border. The text "Download example file" is centered in blue.


 The screenshot shows the 'Upload List of People' tab. At the top, there are two tabs: 'Upload Resumes' and 'Upload List of People'. Below the tabs, there is a header 'File upload (CSV) options - use the following options to upload your CSV file of contacts' and a link 'Download example file'. A checkbox labeled 'Submit all contacts to specific job(s) after upload' is present. Below this is a large dashed box with the text 'Drop Your CSV File(s) Here'. To the right of the box is the word 'OR' and a green button labeled 'Choose CSV File'.

The CSV file will appear as such:

A	B	C	D	E	F	G
Title	First Name	Last Name	Suffix	Job Title	Company	Email1
Mrs	Cynthia	Alvis		Airman	A.J. August Fashion Wear	cynthiaalvis@cuvox.de

By manually filling out all known information (leave all unknown information blank), you can add a mass amount of people at one time into a talent pool or requisite. If you want to submit all Candidates to a role, select that option **PRIOR** to uploading the CSV into the ATS by clicking the box labeled “Submit all contacts to specific job(s) after upload.” Once you have uploaded your CSV file with your Applicant’s information, they will be automatically entered into Kortivity.

Under the “**Upload List of Clients**” Tab, click the “Download Example File” document located in the top Right-Hand portion of the screen. A csv file will download. Once it is downloaded, click the file and it will open with Excel. In the Excel file will be the Example Applicant’s personal information (i.e. Full Name, Job Title, Contact Information).

The CSV file will appear as such:

A	B	C	D	E	F	G
Title	First Name	Last Name	Suffix	Job Title	Company	Email1
Mrs	Cynthia	Alvis		Airman	A.J. August Fashion Wear	cynthiajalvis@cuvox.de

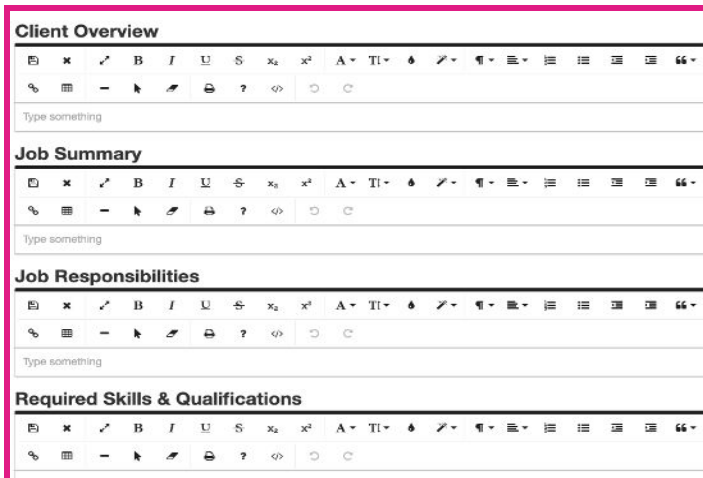
By manually filling out all known information (leave all unknown information blank), you can add a mass amount of clients at one time.

The “Add Job” Button

There are a couple ways to add a job, one way is to click this “Add Job” button. Another is to return to the home screen, click the client, click the tabular “Jobs” (Page 14).

Under the “Add Job” Button, you will be able to add a New Open Role for a Company. To add a New Open Role, it is **required** to fill out the following information: Client, Job Title, Job Title for Ads, Type, Engagement Type, Primary Recruiter, City, State, and Status.

In addition, please provide descriptions of the position under “Job Summary,” “Job

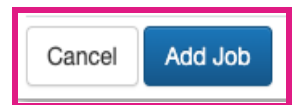


The screenshot shows a form with four sections, each with a rich text editor:

- Client Overview**: Includes a toolbar with icons for bold, italic, underline, strikethrough, text color, background color, link, unlink, list, and quote. The text area contains the placeholder "Type something".
- Job Summary**: Includes a toolbar with icons for bold, italic, underline, strikethrough, text color, background color, link, unlink, list, and quote. The text area contains the placeholder "Type something".
- Job Responsibilities**: Includes a toolbar with icons for bold, italic, underline, strikethrough, text color, background color, link, unlink, list, and quote. The text area contains the placeholder "Type something".
- Required Skills & Qualifications**: Includes a toolbar with icons for bold, italic, underline, strikethrough, text color, background color, link, unlink, list, and quote. The text area contains the placeholder "Type something".

Responsibilities,” and “Required Skills & Qualifications”. You may enter a “Client Overview” of the company and any specific instructions for other Sci.bio Recruiters.

Once you are done writing the required information for your



New Open Role, click “Add Job” Button in the bottom Right-Hand corner of the screen. Once you click “Add Job,” all information will

be saved and may be edited later.

To add a candidate to your job, click on the magnifying glass and add the candidate. They will then appear on the screen below.

Sr. Scientist/Sr Engineer Technical Transfer - #20384 - Lexington, MA

3 New, 140 First Contact, 2 On Hold, 1 Phone Screen, 0 Account Manager Review, 1 Hiring Manager Review, 0 Client Approved, 1 Interview, 0 Offer Extended, 5 Candidate Disqualified, 198 Declined, 0 Hired

5 months ago | total candidates: 351 | showing: 8 | selected: 8 | 9 hours ago

Anant Raina Sr. Scientist, Formulation Development Alcamni (AAI)Pharma Services Corp./ Cambridge Major Labo... Wilmington, North Carolina Area 06/23/2019	Moumita Bhattacharya Seeking Fulltime position in the field of D ata Science University of Delaware Philadelphia, PA 06/23/2019
Amit Gangar Formulation Scientist Novavax Inc. amitgangar@gmail.com (716) 319-0879 28 Myrtle Street Watertown MA 02472 06/23/2019	Gina Altaras Sr. Engineer Moderna Therapeutics Greater Boston Area 06/23/2019

Test- RA - #28200 - Boston, MA

1 New, 0 First Contact, 0 On Hold, 0 Phone Screen, 0 Account Manager Review, 0 Hiring Manager Review, 0 Client Approved, 0 Interview, 0 Offer Extended, 0 Candidate Disqualified, 0 Disqualified Candidate, 0 Hired

1 day/s ago | total candidates: 1 | showing: 1 | selected: 1 | 4 minutes ago

Test-Henry D.a 06/06/2021

Another way to add a job for a particular client is to go to this screen for the client.

Sci.bio Recruiting

Menu / Translate Bio / jobs | open revenue: \$0

Project Team:
 Eric-Lead, Executive roles
 Katja-Scientific
 Danielle-CMC
 Conor- Analytical
 Madeline-Sourcing

Sr. Scientist/Sr Engineer Technical Transfer Job #: 20384 Positions: 0 of 1 filled Location: 29 Hartwell Avenue, Lexington, MA Type: Full Time (Salaried) Hiring Manager Not Set 145 0 2 0 0 5 months ago a day ago	Sr. Scientist, Analytical CMC Job #: 20386 Positions: 0 of 1 filled Location: 29 Hartwell Ave, Lexington, MA Type: Full Time (Salaried) Hiring Manager Not Set 51 2 3 0 0 5 months ago 4 hours ago	Scientist/Engineer Technical Transfer Job #: 20889 Positions: 0 of 1 filled Location: 29 Hartwell Ave Lexington, MA 02421 Type: Full Time (Salaried) Hiring Manager Not Set 89 0 0 0 0 4 months ago 4 minutes ago
Scientist, CMC	Scientist, Analytical	

Click on the down arrow on the tabular “Jobs” and then click “Add Job”. It will open a screen displaying the screen below:

The screenshot shows the Sci.bio 'Add Job' form and a filter dropdown menu. The form is titled 'Translate Bio' and has a search bar. Below the search bar, there are fields for 'Job Title for Ads' (Not Set), 'Positions' (1), 'Type' (Full Time (Salaried)), 'Engagement Type' (Contingency), 'Status' (Draft), 'Priority' (Normal), 'Need by Date' (Not Set), 'Specialty' (Not Set), 'Contractor' (\$Not Set/hour, \$Not Set/day, \$Not Set/week, \$Not Set/month), 'Primary Recruiter' (Madeline Fisk), 'Direct Comp' (Not Set), 'Primary Source' (Not Set), 'Client Website' (Not Set), 'Client LinkedIn' (Not Set), 'Source' (Not Set), 'Location' (29 Hartwell Ave Lexington, MA 02421), 'Posting City' (Lexington), and 'Posting State' (MA). Below the form is a 'Client Overview' section with a table of client information. To the right of the form is a filter dropdown menu with options: 'Assigned to Me', 'High Priority', 'Medium Priority', 'Draft', 'Pipeline', 'Closed', 'Clear All Filters', and 'Add Job'.

Fill out the Job Title, Job Title for Ads, Type (RPO/Contingency), Primary Recruiter, Location & Status (Draft/Open/Closed). Proceed by filling out the job summary, responsibilities, qualifications and then click “Add Job”.

The “Add Client” Button

Using the “Add Client” Button, you can add Clients and their information directly into Kortivity. To add a Client, please fill out the following information: The Client’s Name, Account Manager, Location, and the Client Overview. The Client Overview will be provided by your Client or can be written up by Recruiters using the Company’s information from their Website. Once you are done, click “Add Client.”

To make an update to the client click into the section you are looking to update and you should be able to edit as needed.

The screenshot shows the 'Add Client' form. It has three main sections: 'General Client Information', 'Client Contact Information', and 'Client Overview'. The 'General Client Information' section includes fields for 'Client Name' (Client Name), 'Type' (Active), 'Source' (Not Set), 'Client Web Site' (Client Web Site), and 'Account Manager' (Primary Account Manager Unassigned). The 'Client Contact Information' section includes fields for 'Location' (Primary Location) and 'Phone' (Primary Phone Number). The 'Client Overview' section has a 'Not Set' field. At the bottom of the form are 'Cancel' and 'Add Client' buttons.

The “Add Person” Button

The screenshot shows the 'Add Person' form. It has a header section with a profile picture placeholder, 'Full Name', 'Current Title at Company Name', 'Primary Phone Number | Email Address', and 'Address City, State Zip'. Below the header is a 'Source' section with a 'Not Set' field. At the bottom of the form are fields for 'Type' (Not Set), 'Sourcer' (Ann Darda), 'Archived' (No), 'LinkedIn' (Not Set), 'Facebook' (Not Set), 'Years Experience' (Not Set), 'Primary Recruiter' (Ann Darda), 'Include in Bulk Emails' (Not Set), 'Other' (Not Set), and 'Twitter' (Not Set).

Using the “Add Person” Button, you can add Potential Candidates and their Information directly into Kortivity. To add an employee from a company, it is **required** to fill out the following information: Full Name, Current Title, Company Name, Phone Number and/or Email, Company Address, Source, and Type. You may fill in a “Summary of Experience,” “General Information,” and/or “Tags” (this is similar to the layout on the “Add Job” Page). Please note you can upload resumes on this page. When you click on the green **Upload Resume** button on the bottom right it will parse the resume and add the details. Once you click “Add Person”, all information will be saved and may be edited later.

Summary of Experience

Type something

General Information

Type something

Tags

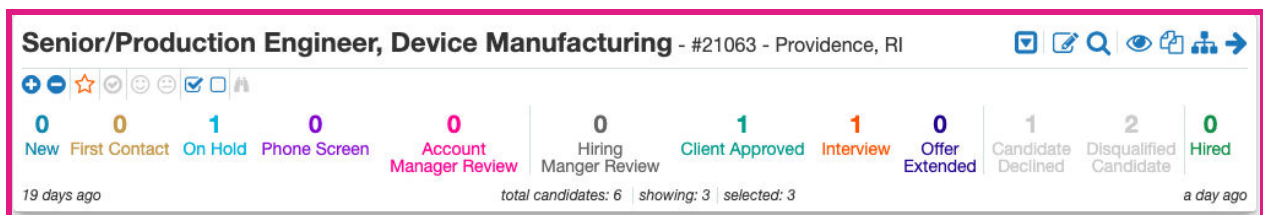
Search tags

Cancel Add Person

Expanding Open Roles

When you click on an Open Role (as seen on Page 2 under “Understanding the Home Screen”), Kortivity will take you to a new screen that details the Potential Candidates

for the Open Role. Another Numerical Flowbar will appear (very similar to the one under the Open Roles on the Home Screen), which denotes the number of candidates at each stage of the recruiting process.



Like the Numerical Flowbar on the Home Screen, the date in the bottom Left-Hand corner denotes when the Job was Opened, and the date in the








Update Multiple Candidates

You currently have 3 candidates that will be updated to the status below.

New Candidate Status:

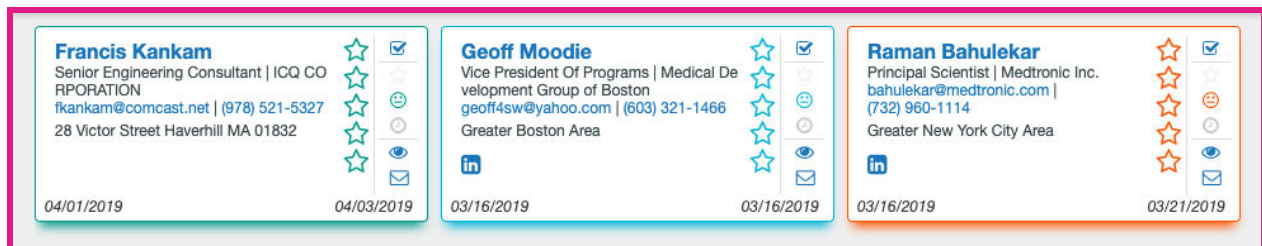
- ✓ New
- First Contact
- Phone Screen
- Client Approved
- Interview
- On Hold
- Candidate Declined
- Disqualified Candidate

☐ broadcast notifications to team

bottom Right-Hand Corner denotes when the last activity on the position occurred. The **Blue Symbols** in upper Right-Hand Corner enable you to do a variety of tasks. The **Blue Box with an Arrow Inside**  allows you to Expand or Collapse Job Details. The **Box and Pencil**  allows you to update Candidates' Status in the Application Process (i.e. how many are at which stage, as seen on the right). The **Magnifying Glass**  allows you to search for Potential Candidates. The **Eye**  allows you to show or hide the details of the Formatted Job Position. The **Two Pieces of Paper**  allows you to create a New Job from a Copy of this Open Position. The **Flow Boxes**  allows you to Manage Positions (i.e. Add an Opening, Close Selected Opportunities, and Remove Selected Opportunities). The **Blue Arrow**  allows you to Show or Hide the Menu to the Right. This Right-Hand Menu shows the Information of Hiring Manager, Human Resources Contact, the Sci.bio Recruiter, and the Kortivity Account Manager. Below this information you can see Recent Activity, any Attachments, and the Primary Job Location.

To Toggle between the Different Open Roles for your company, click the Arrows at the top Right-Hand Corner of the Page. When you click the Arrow and Move to Another Open Position, you will see the same Screen Format for your Other Open Positions.

Under the Numerical Flowbar you will find the Candidate Profiles, including their Name, Current Job Information, Contact Information, and LinkedIn Profiles.



Candidate Name	Title	Contact Info	Application Date
Francis Kankam	Senior Engineering Consultant ICQ CO RPORATION	fkankam@comcast.net (978) 521-5327 28 Victor Street Haverhill MA 01832	04/01/2019
Geoff Moodie	Vice President Of Programs Medical Development Group of Boston	geoff4sw@yahoo.com (603) 321-1466 Greater Boston Area	03/16/2019
Raman Bahulekar	Principal Scientist Medtronic Inc.	bahulekar@medtronic.com (732) 960-1114 Greater New York City Area	03/16/2019

If you wish to sort the Candidate Profiles by Application Date, Candidate Star Rating, or Name, you can use the Tool Bar next to the Arrows for Expanding Open Role Details. This Tool allows you to sort your Candidate Profiles by Status in the Application



Status **Application Date** Activity Rating Name 

Process, Application Date, Activity on their Profile, their Star Rating, and Name. The Symbol to the very Right allows you to Toggle between Ascending and Descending Order of Profiles.

Candidate **Resume**

Raman Bahulekar
Greater New York City Area

Current: Principal Scientist at Medtronic Inc.
Previous: Medtronic, Rutgers University, Rice University, Tsukuba, National Chemical Laboratory, TYRX Inc., Meiji Milk Products Co.
Education: Unknown
Open to: Unknown
Work Auth: Unknown

☆ ☆ ☆ ☆ ☆ ☆

CONTACT INFO

Phone: Cell: (732) 960-1114 Email: Work: bahulekar@medtronic.com Personal: raman.bahulekar@medtronic.com

Social/Web: <https://www.linkedin.com/in/rama...>

New Applicant First Contact Phone Screen Account Manager Review Hiring Manager Review Client Approved Interview Offer Extended Hired

Candidate On Hold **Candidate Declined** **Disqualify Candidate**

Client Comments
Client comments

Candidate Summary
Experienced Principal Scientist with a demonstrated history of working in the highly regulated medical device industry. Skilled in Polymer synthesis and characterization, Biomaterials, Implantable Drug delivery devices, Combination (Drug & Device) products. Experience in launching medical device products, Quality System Regulation (QSR) and Regulatory aspects of medical device products. Strong research / product development professional with a Ph.D. focused in Chemistry (Polymer) 1991 from University of Poona (Thesis work at National Chemical Laboratory, Pune).

Questionnaires & Assessments
Sci.bio Recruiting Overall Rating Set Rating

When you Click on a Candidate Profile, you will Expand their Information. There are Two Tabs to view their Profile in the Upper Left-Hand Corner via the Candidate View (shown to the Left) and Resume View (shown on the Next

Page). Under Candidate View, you can see the Candidate's Contact Information and a Summary of their Experience, along with Questionnaires and Assessments, and their Interview Schedule. You can also rate the Candidate out of Five Stars in the Upper Right-Hand Corner. In the Center of the Screen will be a Progress Bar that shows you where the Candidate is in the Application Process. You can select any Point in Application Process to place them at by clicking the appropriate Circle. You can also select if the Candidate is "On Hold," "Declined," or "Disqualified." In the Right Menu of the Screen, you can view Recent Activity on the Candidate's

Candidate **Resume**

Raman Bahulekar
Greater New York City Area

Current: Principal Scientist at Medtronic Inc.
Previous: Medtronic, Rutgers University, Rice University, Tsukuba, National Chemical Laboratory, TYRX Inc., Meiji Milk Products Co.
Education: Unknown
Open to: Unknown
Work Auth: Unknown

☆ ☆ ☆ ☆ ☆ ☆

CONTACT INFO

Phone: Cell: (732) 960-1114 Email: Work: bahulekar@medtronic.com Personal: raman.bahulekar@medtronic.com

Social/Web: <https://www.linkedin.com/in/rama...>

New Applicant First Contact Phone Screen Account Manager Review Hiring Manager Review Client Approved Interview Offer Extended Hired

Candidate On Hold **Candidate Declined** **Disqualify Candidate**

Word Online

RamanResume Accessibility Mode Download Save to OneDrive Print

Raman Bahulekar, Ph.D.

52 Providence Blvd., Kendall Park, NJ 08824
Home (732) 960 1114, Cell (732) 609 2802
raman.bahulekar@medtronic.com
ramanbahulekar21@gmail.com

Objective
Talented and accomplished scientist seeking a challenging Technical Managerial level position in an industry developing innovative medical devices, that utilizes my multidisciplinary technical background in polymer, biomaterials science, and drug/protein delivery area.

Profile
• Experience in an R&D environment and product development area within the medical device

Profile, any Attachments (i.e. the participant's CV and LinkedIn Profile), and their potential Commute to the Open Position.

Updating a Prospect

When a prospect, or candidate, is added into a req, they will appear as “New”, in blue. A bolder

The screenshot displays the Kortivity interface for a job requisition titled "Quality Control Engineer, Device Manufacturing" (#21395) in Providence, RI. The top navigation bar shows the breadcrumb: Menu / Semma Therapeutics / Quality Control Engineer, Device Manufacturing (21395). Below the title, there are several icons for actions like adding, editing, deleting, and viewing. A status bar shows the following counts: 12 New, 126 First Contact, 17 On Hold, 0 Phone Screen, 0 Account Manager Review, 0 Hiring Manager Review, 0 Client Approved, 1 Interview, 0 Offer Extended, 3 Candidate Declined, 15 Disqualified Candidate, and 0 Hired. Below the status bar, it indicates "3 months ago" and "total candidates: 174 showing: 156 selected: 156" with a "3 days ago" timestamp. Two candidate profiles are shown: Stephen Doyle (Senior Quality Engineer | Contract Manuf acturing, cobrad1@hotmail.com, Woburn, Massachusetts) and Roger Coughlin (Senior Quality Engineer | MicroGroup, rjc1124@gmail.com, Greater Boston Area). Both profiles include a LinkedIn icon and a date of 06/23/2019. To the right of each profile is a vertical bar with icons for selection (star), status (smiley face), and viewing (eye).

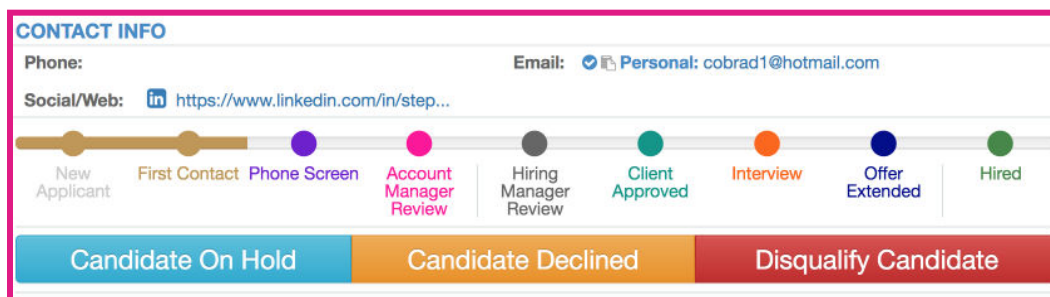
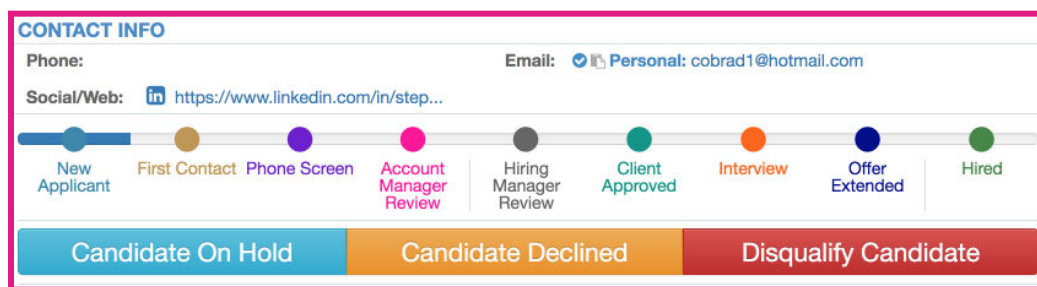
color outline indicates that this record has not yet been opened. There are several icons down the right side of each candidate's card. The check mark is to select them, for example, to bulk update status, or email more than one at a time.

The smiley face indicates whether the candidate is “Active” or “Passive”. Active is a smile, meaning the candidate applied for this role directly. A straight mouthed face means the candidate is Passive, and has been manually added to the req by a recruiter or sourcer. This candidate may not actually be interested in the role, so there is a different level of screening that would need to be done.

The eye icon opens their resume on the side of the screen, without navigating away from the main job req page.

Once you have contacted a prospect, make sure to update them to “First Contact”. You can do this by clicking on the prospects profile and updating the flow bar. Click on the “First Contact”

and the prospect will be updated. Be sure to do this for every step in the recruitment process, further details are below.



To make an update to the candidate record, click on the blue text and a box will populate to make changes.

Sci.bio Recruiting

Jobs Snapshot Hiring Forecast Client Info

Menu / Translate Bio / jobs open revenue: \$0

Project Team:
Eric-Lead, Executive roles
Katja-Scientific
Danielle-CMC
Conor- Analytical
Madeline-Sourcing

Sr. Scientist/Sr Engineer Technical Transfer DM

Job #: 20384
Positions: 0 of 1 filled
Location: 29 Hartwell Avenue, Lexington, MA
Type: Full Time (Salaried)

Hiring Manager

Not Set

145 0 2 0 0
5 months ago a day ago \$0

Sr. Scientist, Analytical CMC CS

Job #: 20386
Positions: 0 of 1 filled
Location: 29 Hartwell Ave, Lexington, MA
Type: Full Time (Salaried)

Hiring Manager

Not Set

51 2 3 0 0
5 months ago 4 hours ago \$0

Scientist/Engineer Technical Transfer DM

Job #: 20889
Positions: 0 of 1 filled
Location: 29 Hartwell Ave Lexington, MA 02421
Type: Full Time (Salaried)

Hiring Manager


Not Set

89 0 0 0 0
4 months ago 4 minutes ago \$0

Scientist, CMC KH

Scientist, Analytical CS

SUMMARY



Test-Henry D.a
 Address City, State Zip
 Current: RA at Sci.bio Recruiting
 Previous: Unknown
 Education: Unknown
 Open to: Unknown
 Work Auth: Unknown
 Tags: None

CONTACT INFO

Phone:

Email:

Home:

Address line 1

Address line 2

City, Province Zip


Work:


Address line 1


Address line 2

City, Province Zip

Social/Web:

 Not Set

 Not Set

 Not Set

Relocation Preferences:

+ Add

Salary:

Base: -- | Bonus: -- | Total: -- | Hourly: --

GENERAL INFORMATION

Type something

ADDITIONAL INFORMATION

Type:

Candidate

Work Authorization:

Not Set

Years Experience:

Not Set

Archived:

No

May send SMS:

Yes

Include in Bulk Emails:

Yes

Birthday:

Not Set

Wedding Anniversary:

Not Set

Middle Name:

Not Set

Nickname:

Not Set

Spouses Name:

Not Set

Status:

Placed by Us

Employment Preferences:

Not Set

Source:

Linkedin

Primary Account Manager:

Unassigned

Primary Recruiter:

Shereen De Assuncao

Sourcing Recruiter:

Record Created:

Record Last Updated:

Record Last Activity:

Record Last Activity Type:

Last Recruiter Interview:

Last Client Interview:

Moving a Candidate Through the Stages to Hire Stage

When a candidate is first entered on a job they will be in the “New Applicant” stage.

Sci.bio

Menu

Sci.bio Recruiting / Jobs / Test: RA (28208) / candidates / Test-Henry D.a

Candidate

Resume

Compensation

Test-Henry D.a

Current: at
 Previous: Unknown
 Education: Unknown
 Open to: Unknown
 Work Auth: Unknown
 Tags: None

CONTACT INFO

Phone:

Email:

Social/Web:

Search LinkedIn for Test-Henry D.a

New Applicant

First Contact

Phone Screen

Account Manager Review

Hiring Manager Review

Client Approved

Interview

Offer Extended

Hired

Candidate On Hold

Candidate Declined

Disqualify Candidate

Applied:

06/08/2021

Candidate Type:

Passive

Submitted By:

Shereen De Assuncao

Last Activity:

a few seconds ago

Candidate Link:

<https://k7y.pivc/zMvSE>

Once you have communicated with the candidate you can click on “First Contact” and you will see the candidate move through the stages.

Candidate Profile: Test-Henry D.a.

CONTACT INFO

Phone:
 Email:
 Social/Web: [Search LinkedIn for Test-Henry D.a](#)

STAGES: New Applicant → First Contact → Phone Screen → Account Manager Review → Hiring Manager Review → Client Approved → Interview → Offer Extended → Hired

STATUS BAR: Candidate On Hold | Candidate Declined | Disqualify Candidate

Applied: 06/08/2021
Candidate Type: Passive
Last Activity: a few seconds ago
Candidate Link: <https://k7y.pl/c2MMSE>

When you click on “Phone Screen” you will see the following screen.

Schedule Interview for Test-Henry D.a

Name: enter the name of the interview (e.g. Phone Screen)

Type: Recruiter Phone Screen

Company: Sci.bio Recruiting

Position: Test- RA

Date: enter date of the interview

Time: enter start time to enter end time

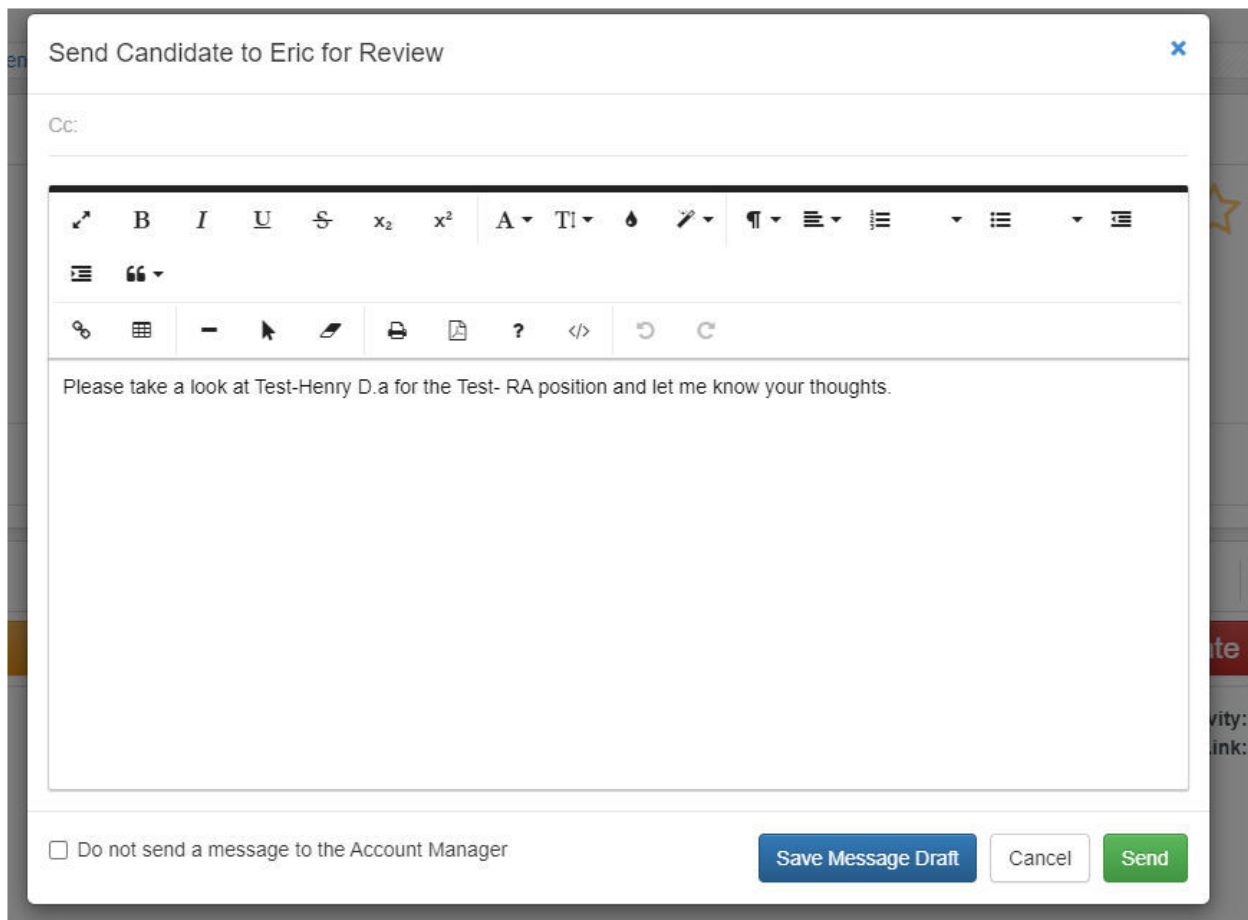
Time Zone: US/Eastern

Notes: enter any notes

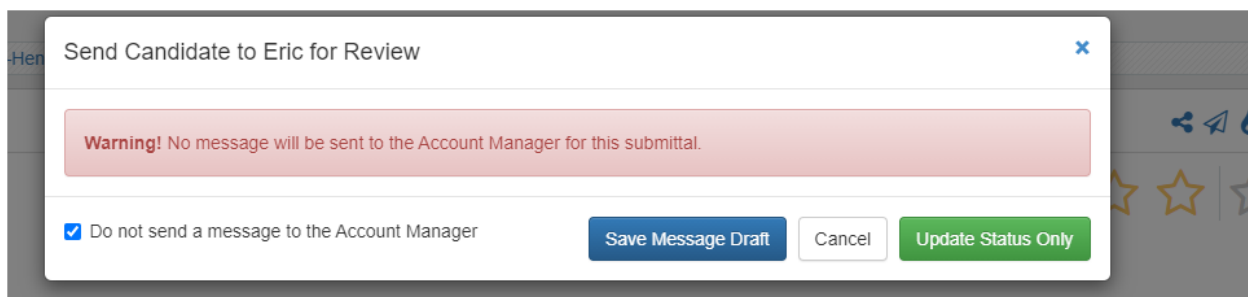
☐ schedule this interview on my calendar
☐ schedule this interview on my planner

Buttons: Skip, Save

When you click on Account Manager Review, an email template will appear. You also have the option to not send at the bottom of the screen.



To not send a message, confirm you will be updating the status only.



When you click on “Hiring Manager Review” an email template will appear to send. Edit as needed. Once again you have the option to not send a message at the bottom of the screen.

Submit Candidate to Hiring Manager

To:

Cc:

Bcc:

Subject: [Sci.bio Recruiting presents Test-Henry D.a for Test- RA at Sci.bio Recruiting](#)

From: Shereen De Assuncao (shereen@sci.bio)

Attachment(s):

Rich Text Editor:

Please take a look at Test-Henry D.a for the Test- RA position and let me know your thoughts.

☐ Do not send a message to the Hiring Manager

[Save Message Draft](#) [Cancel](#) [Send](#)

When you click on “Client Approved” no screen will populate and the candidate will be moved forward.

When you click on “Schedule Interview.” Enter relevant details. You will have the option below to add to your planner and calendar.

Schedule Interview for Test-Henry D.a

Name

enter the name of the interview (e.g. Phone Screen)

Type

Client Phone Interview

Company

Sci.bio Recruiting

Position

Test- RA

Date

enter date of the interview

Time

enter start time

to

enter end time

Time Zone

US/Eastern

Notes

enter any notes

☐ schedule this interview on my calendar

☐ schedule this interview on my planner

Skip

Save

When you click “Offer Extended” you will see additional information required. Enter relevant details.

Additional Information Required



Client Information

Name	Sci.bio Recruiting
Billing Contacts	
Payment Terms	Upon Receipt, NET 10, NET 30, etc.
Industry Sector	Technology, Manufacturing, etc.

Placement Information

Source	LinkedIn
Title	Test- RA
Start Date	June 23 2021
	<input type="checkbox"/> this is an estimated start date
Employment Type	Full Time (Salaried)
Annual Salary	\$ <input type="text"/>
	Bonus: <input checked="" type="radio"/> Percentage <input type="radio"/> Dollar
Annual Bonus	Bonus amount, 15%, 5,000, etc. %
Benefits	Medical, dental, paid time off, flex time, matching 401k, etc.

Placement Fees

[+ Add Fee](#) [Remove Selected](#)

Type	Amount	Retention	Additional Details
There are no contract fees configured for this job.			

Candidate Referred To Us By

First Name

Jane

Last Name

Smith

Email

jane.smith@gmail.com

Phone

(512) 867-5309

Address Line 1

123 Main St.

Address Line 2

Suite 200

City

Austin

State

TX

Zip

78701

Additional Information

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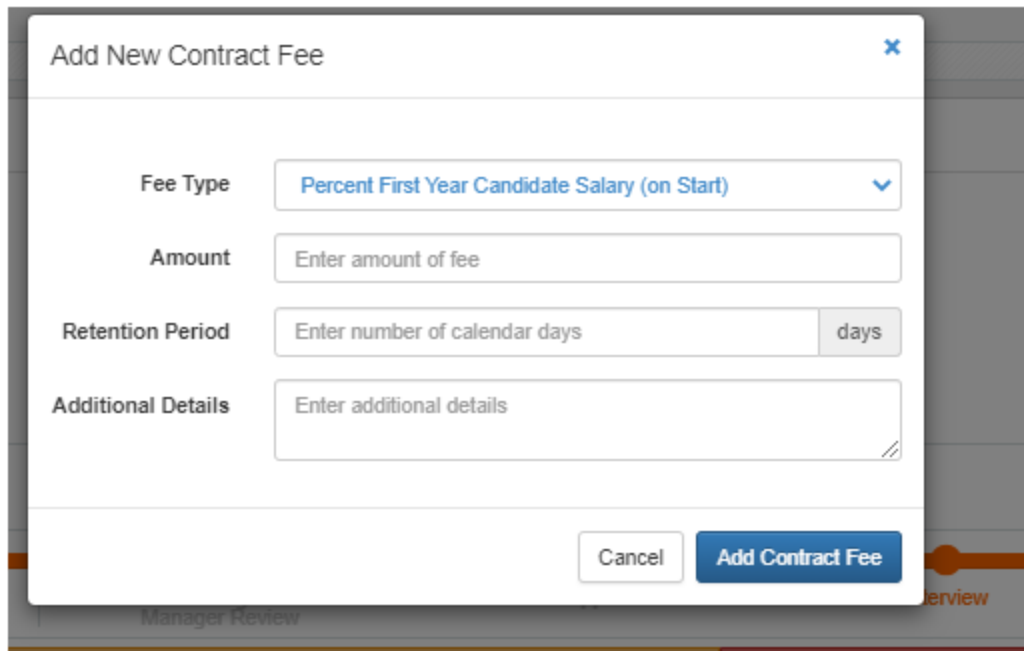
Type something

0

Cancel

Set Status to Offer Extended

Click Add fee to add details for the contract fee.



The screenshot shows a modal dialog box titled "Add New Contract Fee" with a close button (X) in the top right corner. The dialog contains four input fields: "Fee Type" with a dropdown menu showing "Percent First Year Candidate Salary (on Start)", "Amount" with a text input field containing the placeholder "Enter amount of fee", "Retention Period" with a text input field containing "Enter number of calendar days" and a "days" unit selector, and "Additional Details" with a text input field containing "Enter additional details" and a small edit icon. At the bottom right of the dialog are two buttons: "Cancel" and "Add Contract Fee". The background of the application window is dimmed, showing a "Manager Review" section.

The same screen will appear to confirm if there have been any changes. Confirm any changes. And click "Set to Hired"

Additional Information Required



Client Information

Name Sci.bio Recruiting

Billing Contacts

Payment Terms Upon Receipt, NET 10, NET 30, etc.

Industry Sector Technology, Manufacturing, etc.

Placement Information

Source LinkedIn

Title RA

Date Accepted June 09 2021



Start Date June 22 2021

☐ this is an estimated start date

Employment Type Full Time (Hourly)



Estimated Hours 40

Weekly



Hourly Rate \$ 35

Hourly

Bonus: ☒ Percentage ☐ Dollar

Annual Bonus 5%



Benefits Medical, dental, paid time off, flex time, matching 401k, etc.



Placement Fees

+ Add Fee

Remove Selected

Type	Amount	Retention	Additional Details
There are no contract fees configured for this job.			

Candidate Referred To Us By

First Name

Jane

Last Name

Smith

Email

jane.smith@gmail.com

Phone

(512) 867-5309

Address Line 1

123 Main St.

Address Line 2

Suite 200

City

Austin

State

TX

Zip

78701

Additional Information

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Type something

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Cancel

Set Status to Hired

The “Send Feedback” Button

The “Send Feedback” Button allows you to send Feedback to the Kortivity Developers and Programmers who work to improve the system. If you ever have any suggestions (i.e. a button or tool to make things easier) please write them in this box and click “Send.” This Kortivity Feature also allows you to upload Screenshots and other Files that may be helpful to program developers (up to Three Files).

Installing the Sci.bio Chrome Tool

The Sci.bio Chrome Tool will help you with Sourcing via LinkedIn. Specifically, it will allow you to upload Potential Candidates from LinkedIn to Kortivity without having to manually upload anything into the system.

To Download the Chrome Tool, you will need to download the file **the Chilca and Likor tool** from the Google Drive (this will be shared with you your first week of working for Sci.bio via Google Drive; if you have any problems finding this file, you can find it under the Google Drive “Team Folder” under the folder “Technology Tools”). Once this file is shared with you, click “download.” Once it is fully downloaded, open Google Chrome and in the Upper Right-Hand Corner of the Screen, click the Three Vertical Dots. Once you click the Three Vertical Dots Button, it will open a menu with options. Click “More Tools” and from there click “Extensions.” It will then bring you to the Google Chrome Extensions Page. Once you are on that page, click “Load Unpacked.” This will bring you to a screen where you should select the downloaded zip file wherever it has been saved to your computer. Once you click that and press “Select,” the Sci.bio Chrome Tool will appear in its own box on the Extensions page. Make sure to slide the Blue Circle in the Blue Bar to the Right so it is Blue and not Gray (this means it is visible on your Chrome Browser).

Questions and Contacts

If you experience any Technical Difficulties Accessing or Using Kortivity, please contact Shereen De Assuncao or Allison Ellsworth .