

# Managing recruitment with Coolcare

## recruitment section

Coolcare allows you to manage your recruitment process within the system, keeping track of job vacancies and potential candidates. Similar to Coolcare's enquiries, you can track a candidate's progress through the recruitment process, and if hired, can create a new staff record using the information from the vacancy and candidate.

To open the recruitment section:

- Log in to Coolcare
- Expand the **Care Home** section on the left-hand side
- Select **Recruitment**

## managing vacancies

When you open the recruitment section, you will see the *Vacancies* tab. This is where you can create new job vacancies and manage the ones you have open. It will display any current open vacancies on the screen.

The screenshot shows the 'Recruitment' section with the 'Vacancies' tab selected. A '+ New Vacancy' button is in the top left. A toggle switch in the top right allows switching between 'Active Vacancies' (selected) and 'All Vacancies'. The table below lists two active vacancies:

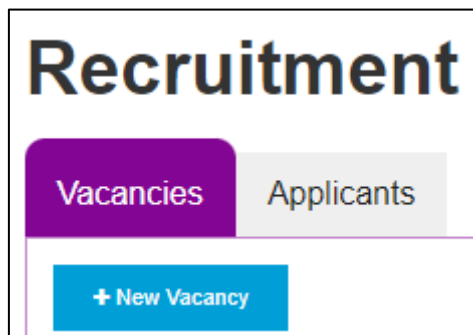
Vacancy Title	New	Screened	Interviewed	Offered	Rejected	Total
<b>Care Assistant</b> Care Assistant Active	1	0	0	0	0	1
<b>Team Leader</b> Senior Carer Active	0	0	0	0	0	1

At the bottom, there are pagination controls showing '1 / 1 (2)'.

Each vacancy displayed will display a breakdown of how many applicants it has at each stage; *New*, *Screened*, *Interviewed*, *Offered* and *Rejected*, as well a total number of applicants. You can also toggle the switch in the top right corner from *Active Vacancies* to *All Vacancies*, this will display any vacancies that are inactive, due to the position being filled or the vacancy closed.

## creating a new vacancy

If you wish to create a new vacancy on Coolcare, navigate to the recruitment section and select the **+New Vacancy** button at the top of the page.



This will open up a new page where you can input the vacancy details such as the position the vacancy is for, potential pay and hours, and any extra detail you wish to add.

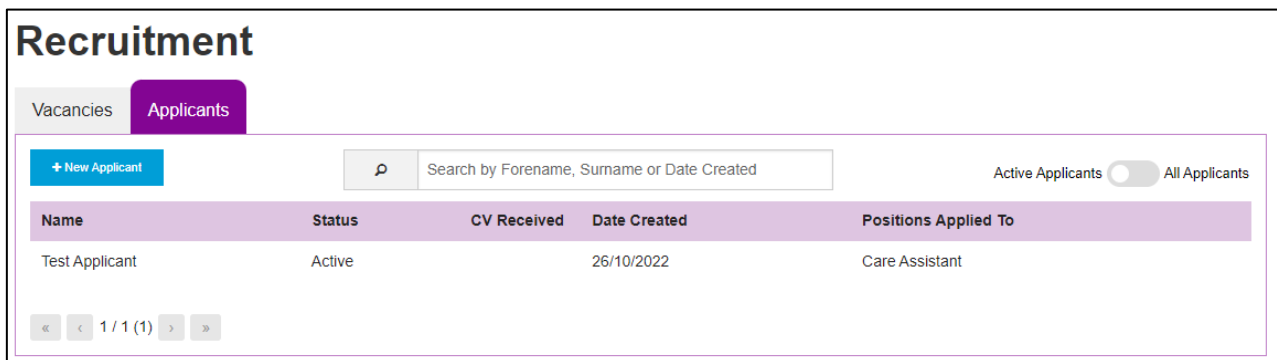
A screenshot of the 'Vacancy' creation form. The form has a title 'Vacancy' at the top left. It contains several input fields: 'Vacancy Name' (with a 'Required' label) containing 'Home Maintenance Technician', 'Publish Date' (with a 'Required' label and a blue 'x' icon), 'Pay' (containing '£15/hour'), 'Position' (with a 'Required' label and a dropdown menu showing 'Maintenance'), and 'Status' (with a 'Required' label and a dropdown menu showing 'Draft'). There is also an 'Hours' field containing '28' and a 'Notes' field with a character count '0/3500'. At the bottom of the form are two blue buttons: 'Back' with a left arrow and 'Save' with a floppy disk icon.

The required information is *Vacancy Name*, *Position*, and *Status*. The position list will feature all staff positions that are created on Coolcare via the *Group Positions* section. For more information, see our *Getting Set Up* guides. The status is the stage the vacancy is currently at; *Active*, *Hired*, *Closed*, *Draft*, or *On Hold*. For creating a new vacancy, you would want the vacancy to be either *Active* or *Draft*, depending on if the vacancy is already open or just a placeholder.

Once you have filled out all the information you need, select **Save** to create the vacancy. Once created, you can amend the vacancy details if required.

## managing applicants

The second tab on the recruitment section is for applicants, where you can create records for those applying for your vacancies and keep track of them.

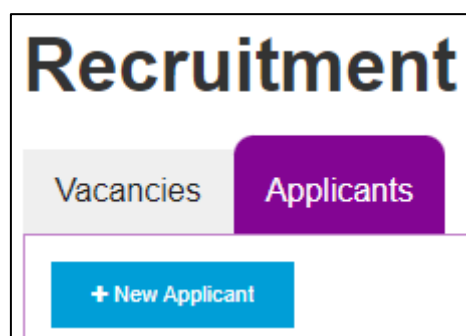


The screenshot shows the 'Recruitment' section with the 'Applicants' tab selected. At the top left is a '+ New Applicant' button. To its right is a search bar with a magnifying glass icon and the text 'Search by Forename, Surname or Date Created'. Further right is a toggle switch labeled 'Active Applicants' (which is currently turned on) and 'All Applicants'. Below these elements is a table with the following columns: Name, Status, CV Received, Date Created, and Positions Applied To. The table contains one row for 'Test Applicant' with status 'Active', 'CV Received' as an empty field, 'Date Created' as '26/10/2022', and 'Positions Applied To' as 'Care Assistant'. At the bottom left of the table is a pagination control showing '1 / 1 (1)' with navigation arrows.

This page will display any active applicants you have in Coolcare, as well as some basic details on each one, including if you have received their CV and which vacancies they have applied for. You can also toggle the switch at the top right from *Active Applicants* to *All Applicants*, which will also include any *Hired* or *Inactive* applicants.

## creating a new applicant

If you wish to add a new applicant to Coolcare, navigate to the recruitment section, open the *Applicants* tab and select **+New Applicant** at the top of the page.



This screenshot shows a portion of the 'Recruitment' page, specifically the 'Applicants' tab which is highlighted in purple. Below the tab is a blue button with a white plus icon and the text '+ New Applicant'.

This will open a new page where you can input the details of the applicant. The only required information is the applicant's name, but you can include additional information such as address and contact details, where they saw/heard about the vacancy, and if they have included a CV with their application.

# Applicant

Personal Details	Status
<p>Title Mr</p> <p>Forename <small>Required</small> James</p> <p>Surname <small>Required</small> Tucker</p> <p>Date of Birth 16/07/1998</p> <p>Sex Male</p> <p>Gender </p> <p>Ethnicity White British</p>	<p>Status Active</p>
Other Details	Contact Details
<p>Source Job Site</p> <p><input checked="" type="checkbox"/> CV Received</p>	<p>Address Search WF10 5GP</p> <p>29 Morris Road, Castleford, West Yorkshire</p> <p>Address 1 29 Morris Road</p> <p>Address 2 Castleford</p> <p>Address 3 </p> <p>Address 4 West Yorkshire</p> <p>Postcode WF10 5GP</p> <p>Phone </p> <p>Mobile 07239847234</p>

Once you have filled out all the details you require, select the **Save** button at the bottom of the page to create the applicant. Once created, you can still amend the applicant's details if you need to.

## attaching a CV to an applicant

Once created, you can attach a CV to an applicant. Select the applicant from your applicant list to open their record. On the right-hand side of the page there is the *Documents* section where you can attach external documents to the applicant. Select the **+Insert** button and select the file from your computer to attach it to the applicant.

## Documents

**+ Insert**

**i** Info - No Documents for Applicant

## adding an applicant to a vacancy

Once you have created a vacancy and applicants, you can add applicants to the vacancy to track each applicant's progress through the application and hiring process for this specific vacancy. In order to do so, navigate to the recruitment section and select the vacancy you wish to add applicants to.

### Recruitment

Vacancies

Applicants

+ New Vacancy

Active Vacancies ☐ All Vacancies

<b>Care Assistant</b> Care Assistant Active	1 New	0 Screened	0 Interviewed	0 Offered	0 Rejected	1 Total
<b>Home Maintenance Techni...</b> Maintenance Active	0 New	0 Screened	0 Interviewed	0 Offered	0 Rejected	0 Total
<b>Team Leader</b> Senior Carer Active	0 New	0 Screened	0 Interviewed	0 Offered	0 Rejected	1 Total

« < 1 / 1 (3) > »

On the vacancy you can amend any details if they have changed since the vacancy was created, and you can view applications on the right-hand side of the page. To add an application to the vacancy, select the **Manage Applications** button.

### Vacancy

Vacancy Name Required  
Home Maintenance Technician

Publish Date \*

Pay  
£15/hour

Position Required  
Maintenance

Status Required  
Active

Hours  
28

Notes  
0/3500

#### Applications

+ Manage Applications

*i* Info - No Applications Available

This will open up a list of active applicants where you can select which applicants you wish to add to this vacancy. Select them from the list on the left-hand side to add them to the list on the right and then click **+Add Applicants** to save.

### Add applicants to vacancy

Select from active applicants:

Applicants to be added to vacancy:


Name	Date Created	Applicant Name	Applicant Status	Date Applied	
Test Applicant	26/10/2022	James Tucker	New	01/11/2022	<b>x</b>


+ Add Applicants

## managing application progress


Once an applicant is added to a vacancy you can manage their progress through the application process. The applicant will appear in the *Applications* section of the vacancy, including their application date and status.

**Applications**




Name	Status	Date Applied	Hire
James Tucker	New	01/11/2022	

There are 6 statuses that reflect different stages of the application process. You can select the drop down to choose which stage each applicant is at; *New*, *Screened*, *Interviewed*, *Offered*, *Rejected* or *Hired*. Once you've changed a status don't forget to save using the button at the bottom of the vacancy to update each application's progress.

Name	Status	Date Applied	Hire
James Tucker	<div>Interviewed</div> <div>New</div> <div>Screened</div> <div>Interviewed</div> <div>Offered</div> <div>Rejected</div> <div>Hired</div>	01/11/2022	

## hiring an applicant

If an application reaches the end of the process and is hired, you can mark them as hired on the vacancy and create a new staff record from their application. Select the yellow button next to their *Date Applied* in the *Application* section of the vacancy.

Name	Status	Date Applied	Hire
James Tucker	Hired	01/11/2022	

This will open the *New Staff Member* page in Coolcare where you can create their staff record, with information from the application already filled in.

**Important tip:** Any documents added to the applicant will NOT transfer across when they are moved to staff and hired. All documents will need to be added to the new staff record manually.

# New Staff Member

GENERAL / ELIGIBILITY / EMPLOYMENT DETAILS

## General

### Personal

Forename Required

James

Date of Birth Required

16/07/1998



Surname Required

Tucker

Ethnic Origin

White British