

GUIDE: Indeed Manager Access

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|--------------------------------------|------------|--------------------------------|---------|--------------------------------|-----------------|-----------------|---|
| <i>Original Implementation Date:</i> | 10/23/2020 | <i>Date Reviewed/ Revised:</i> | 7/13/21 | <i>Area of Responsibility:</i> | Human Resources | <i>Version:</i> | 4 |
|--------------------------------------|------------|--------------------------------|---------|--------------------------------|-----------------|-----------------|---|

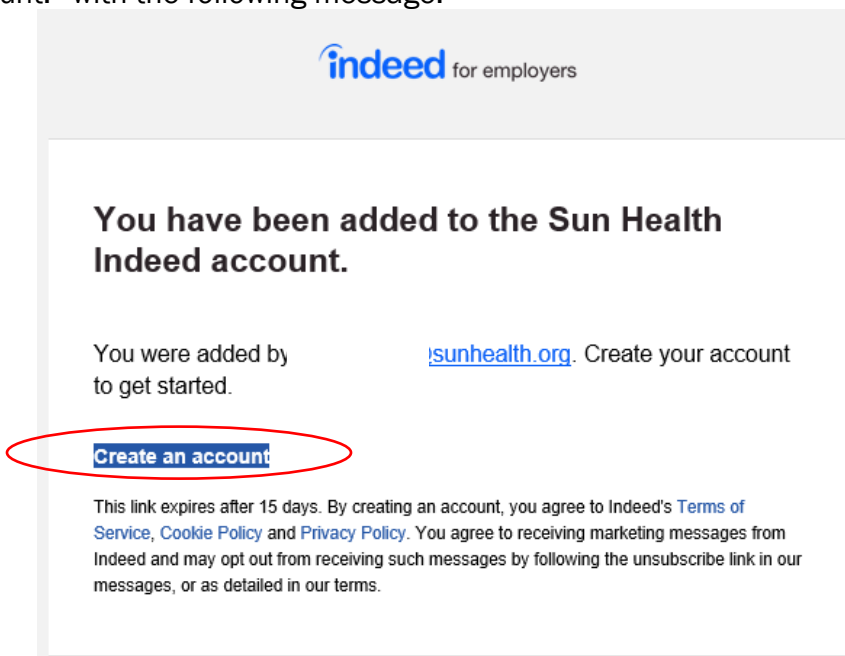
PURPOSE: The Indeed Manager Access Guide instructs those with Indeed “Candidate” manager access on how to:

1. Create/Reset an Account..... Page 1-3
2. Navigating Indeed access..... Page 4-5
Hiring Insights report..... Page 5
3. Job Post Dashboard, Candidate Review and Sorting..... Page 6-11
4. Individual Candidate Search, Profile and Communication ToolsPage 12-15
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Section 1: Create/Reset an Account:

Human Resources (HR) grants access: When setting up your first job post, human resources will set up access to Indeed. The following steps will need to be followed to be able to access the Indeed account:

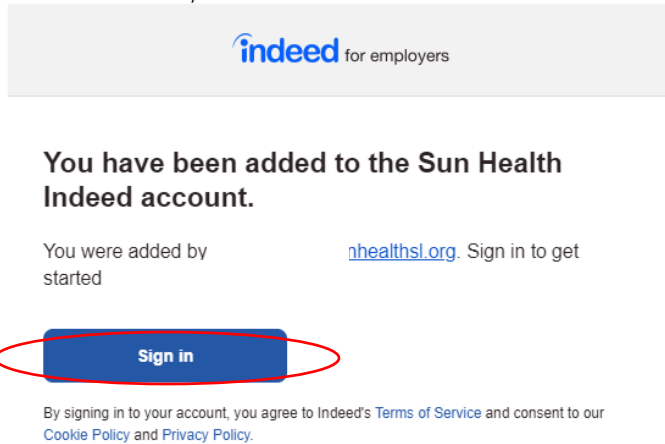
1. **Create an account:** Human Resources will create a user account on your behalf in which you will receive an email directly from Indeed saying “You have been added to the Sun Health Indeed account.” with the following message.



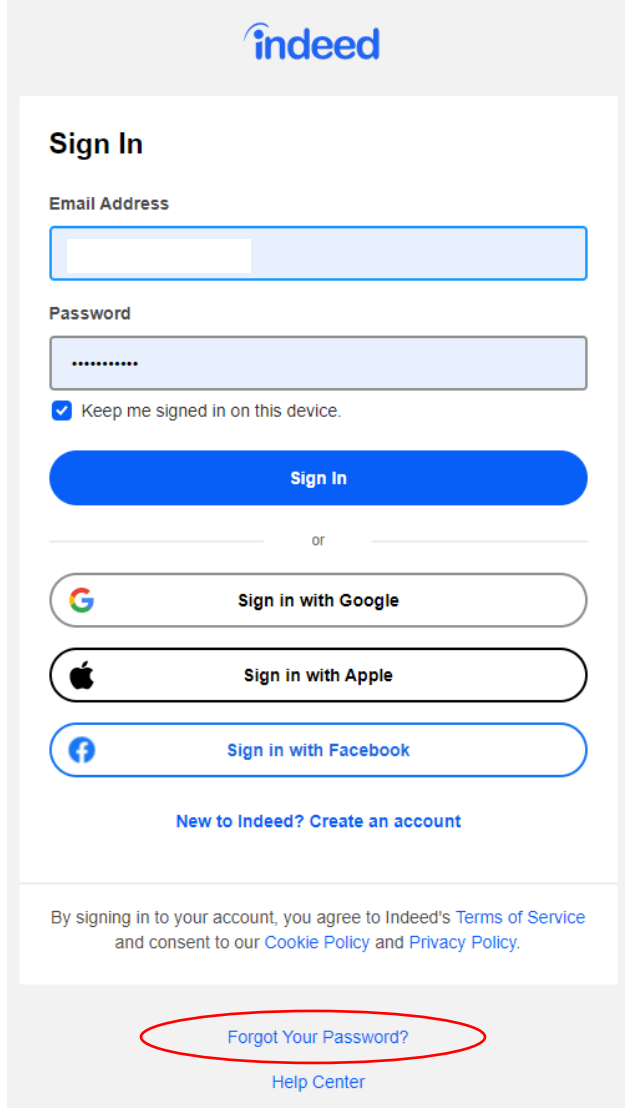
- a. Click on → **Create an account.**
 - i. If the account is not created within 15 days of the invitation being sent, the link will expire and will need to be reset by Human Resources.

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- b. **Reset account:** If you previously created an account and HR resets your login access the email reset will direct you to **Sign in** (rather than **Create an account**).



Once you click on the Sign in link you will be directed to the Indeed Employer Sign In page where you will click on **Forgot Your Password?**. From here you will be able to reset your password to login. Make sure you save your login information on your desktop.



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2. Once you accept the invitation it will bring you to the Indeed login page where you will need to click on **New to Indeed? Create an account**. When creating your account your Sun Health email address will be your login and you will create your own password (at least 8 characters long)
 - i. Make sure you complete the following to make future sign-in easier:
 1. Check the box next to **“Keep me signed in on this device.”** if you are logging on from your work designated computer used exclusively by you.
 2. Check the **“I am human”** box and complete the verification process if prompted.
 3. then click **→Create Account**
 4. Add the Indeed website to your browser Favorites for ease of future accessibility.

Create an Account (it's free)

Sign in with Google

Sign in with Apple

Sign in with Facebook

or

Email Address

Please enter your email address

Password

Please enter a password at least 8 characters long

Keep me signed in on this device.

I am human

hCaptcha
Privacy - Terms

Create Account

By creating an account, you agree to Indeed's [Terms of Service](#), [Cookie Policy](#) and [Privacy Policy](#). You consent to receiving marketing messages from Indeed and may opt out from receiving such messages by following the unsubscribe link in our messages, or as detailed in our terms.

- ii. The screen will say **“You have been successfully added to the employer account. Please wait while we redirect you further.”**
- iii. The next screen will ask **“What would you like to do for Sun Health?”**
 1. Click on the middle box **→Manage Candidates**. This will bring you to the main Indeed Dashboard page.

What would you like to do for Sun Health?

Post a job
Post jobs for free*, or pay to attract more candidates faster.

Indeed Resume Search
Search millions of resumes to find candidates across your industry and location.

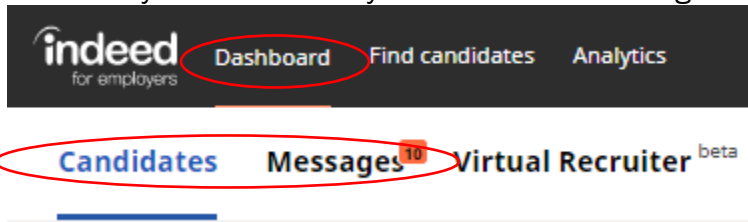
Manage Candidates
Review applications, schedule interview and view recommended candidates.

*Terms, conditions and usage limits apply.

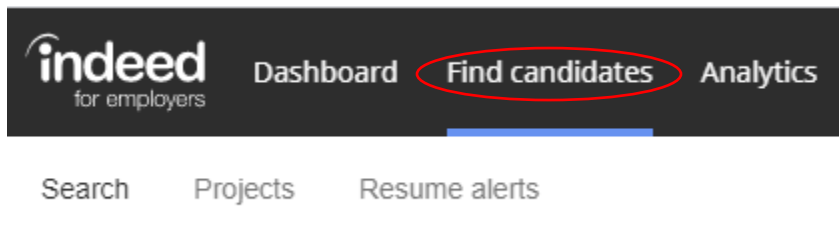
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Section 2: Navigating Indeed Access

1. Once you are logged into the main dashboard you will see the following main **Dashboard** page with the following options in the top left-hand corner:
 - a. Under the **Dashboard** tab there are 2 different sections:
 - i. **Candidates:** This section houses all candidates for all individual job posts on the company account.
 - ii. **Messages:** This section stores all the messages sent to candidates.
* For more information about reviewing and communicating with candidates see **Section 4: Individual Candidate Communication and Tools**
 - iii. **Virtual Recruiting Assistant:** *This is a product that is currently going through Beta testing with Indeed. This may or may not be a permanent Indeed product which is why the functionality is not covered in this guide.

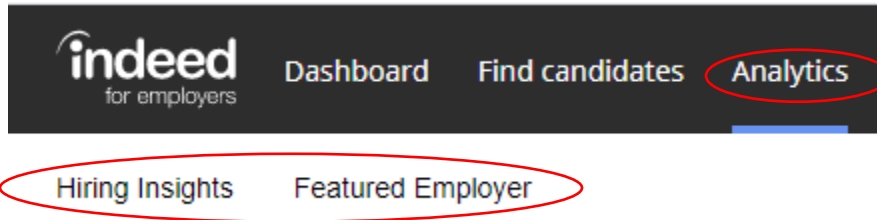


- b. **Find candidates:** This functionality is connected to a paid subscription called **Indeed Resume** which provides access to Indeed passive candidates who have resumes on the Indeed data base. These candidates can be filtered using advanced search options using job titles, skills, companies, and field of study.
*The subscription service availability is limited. Reach out to your Human Resources Business Partner and the Talent Acquisition Manager to initiate usage of this resource.

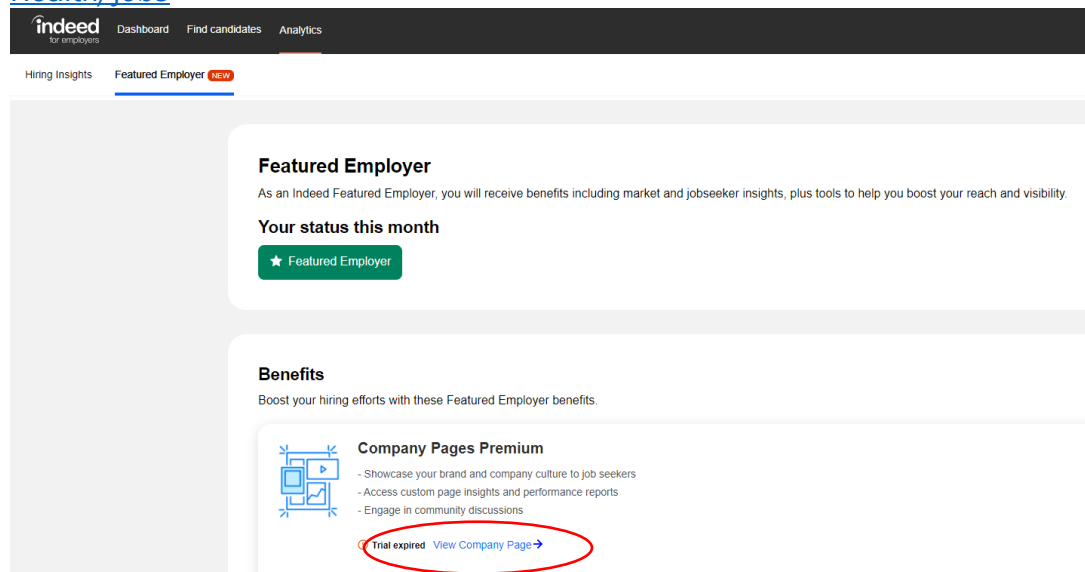


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- c. **Analytics:** In this tab our current account status allows all users to run **Hiring Insights reports**. The Hiring Insights reports gives Indeed data about active job postings from the previous month and is usually available the 2nd week into the current month.



- i. **Hiring Insights:** This section provides information about the local labor market in the previous month to help with optimizing job postings. The reports can be run by job title or occupational category and job location. These reports can also be customized and shared and include:
- Competition Score: How competitive the position compares to other job markets.
 - How many jobs are posted, and job seekers are available who have clicked on jobs in the job location.
 - Approximately how many job seekers per job and how the candidates are clicking on available jobs.
 - Average salary *This is on a national average and does NOT factor in local minimum wage requirements.
 - Employers with active jobs with this job title
 - Top search terms and employers by clicks
 - Resumes available with the job title and resumes added or updated in the past month data.
 - Reported years of experience and education levels.
 - Most common employers and common location of the employers.
- ii. **Featured Employer:** This section can connect you directly with the Sun Health Indeed Company page by clicking on **View Company Page**
Sun Health Company Page Direct Link: <https://www.indeed.com/cmp/Sun-Health>
Sun Health Company Jobs Direct Link: <https://www.indeed.com/cmp/Sun-Health/jobs>

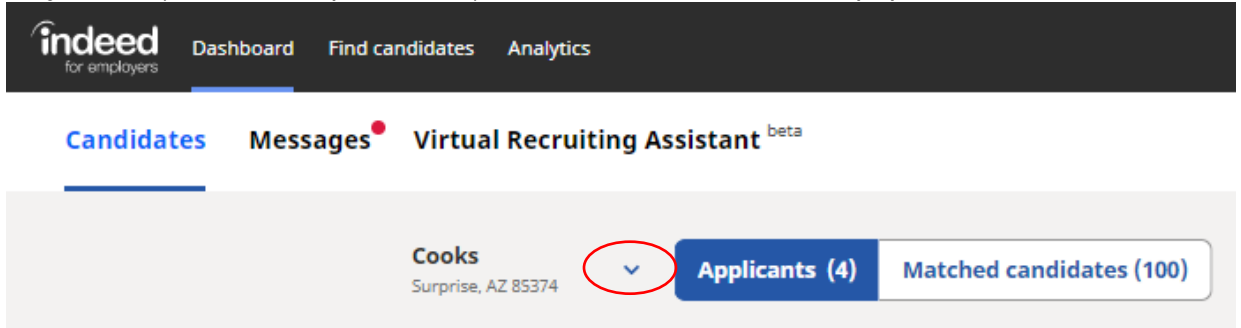


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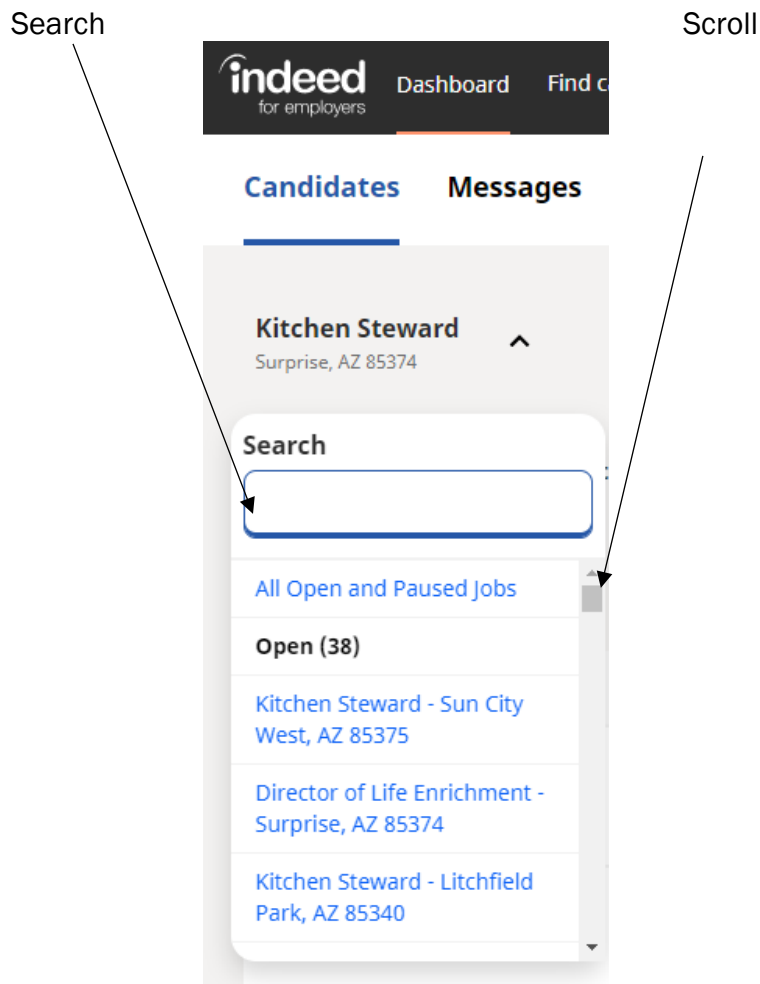
Section 3: Job Post Dashboard, Candidate Review and Sorting

1. Job Post Dashboard

- a. To view any open or paused job post:
- b. Navigate to Dashboard → Candidates → then click on the down arrow. You can also click on the job title (in this example “Cook”) and the search box should populate.



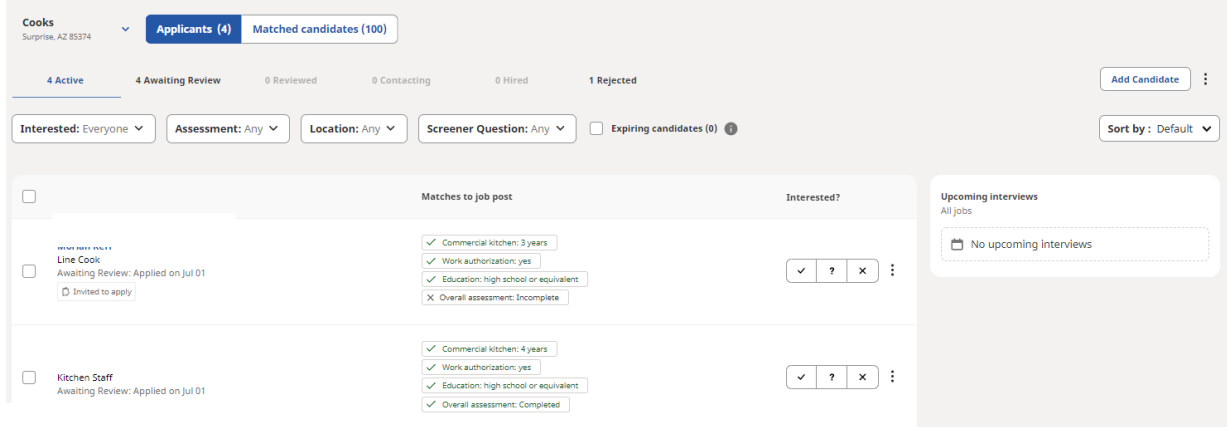
- c. Select the job you want to review candidates for by either typing the job title into the search box or scrolling through the listing:



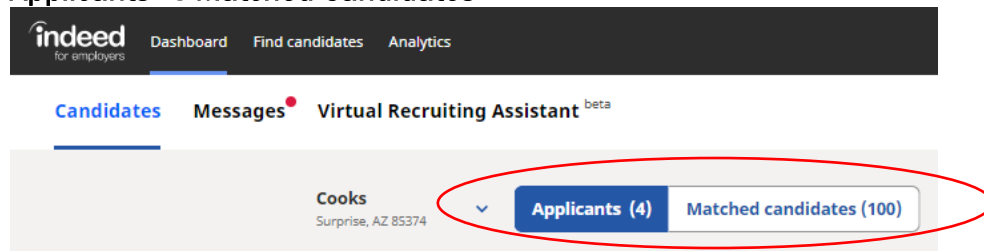
*Please note that you can see ALL the different open and paused job posts across the company account, so make sure you are in the correct job post for your specific campus.

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d. The candidates for the job post will populate on the screen with the following information:



i. Applicants vs Matched Candidates



1. **Applicants** are job seekers who actively applied to the Indeed job post.
2. **Matched Candidates** are candidates who have resumes within the Indeed platform who match the job post based off job titles, skills, or other background information matched through Indeed analytics and the content of the candidates resume. These candidates contact information are only available through the **Indeed Resume** subscription service referenced in Section 2. 1. b of this guide. Contact your Human Resources Business Partner and the Talent Acquisition Manager to initiate usage of this resource.

- ii. **Add candidate:** A candidate can be manually entered in Indeed (from a paper application from walk in candidates) by clicking on Add candidate and manually entering the Personal Information, Address, Employment Information, and Education. The resume can also be uploaded to the candidate profile.

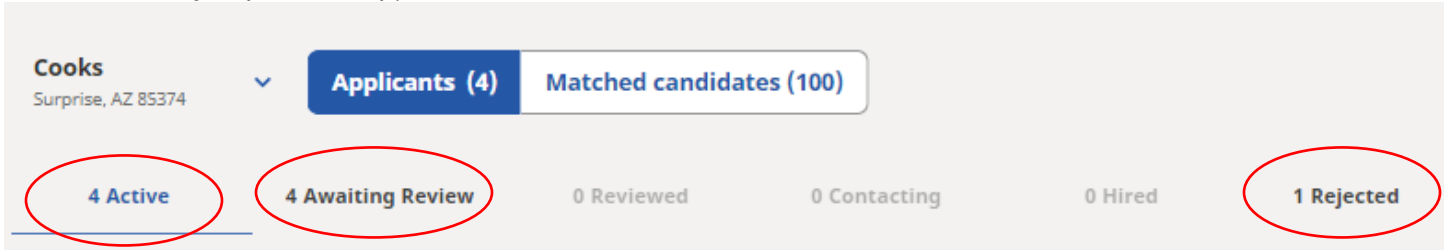
The screenshot shows the 'Add candidate' form in the Indeed Manager interface. At the top, there is a search bar labeled 'Search candidates' with a magnifying glass icon. Below the search bar is a 'Considered for' dropdown menu with 'Senior Accountant - Surprise, AZ 85374' selected. The form is divided into several sections: 'Personal Information' with fields for Name, Email, and Phone; 'Resume' with a 'Choose File' button and 'No file chosen' text; 'Address' with a 'Show' button; 'Employment Information' with a 'Show' button; and 'Education' with a 'Show' button. At the bottom, there is a blue 'Add candidate' button and a 'Cancel' button. The 'Add candidate' button is circled in red.

- iii. **Upcoming Interviews:** Will show all upcoming interviews scheduled through Indeed.

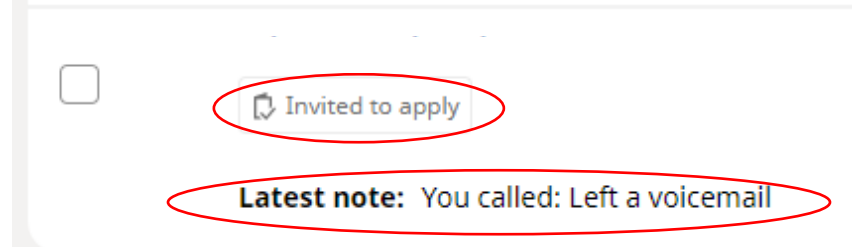
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2. Candidate Review

- a. **Status filtering bar:** The candidates listed on the screen are from the tab highlighted in blue in the status row. Candidates will be listed when the different status are selected (in this example Active, Awaiting Review and Rejected are options. Candidates are automatically filtered into Rejected if they answer unfavorably to questions that are “Required” during the job post set up).



- b. **Candidate Information:** Under the candidates name the following information will be provided:
 - i. **Candidate Highlighted Position-**Candidates can select a position they wish to highlight to the hiring manager when they apply.
 - ii. **Status of Candidate Review**
 - iii. **Apply date**
 - iv. **Invited to Apply-**If there is a label **Invited to Apply** under the candidates’ name, the candidate was targeted as a position match and messaged either when the job was posted or via Indeed Resume sourcing efforts. This candidate saw the sourcing messages and actively applied for the position.



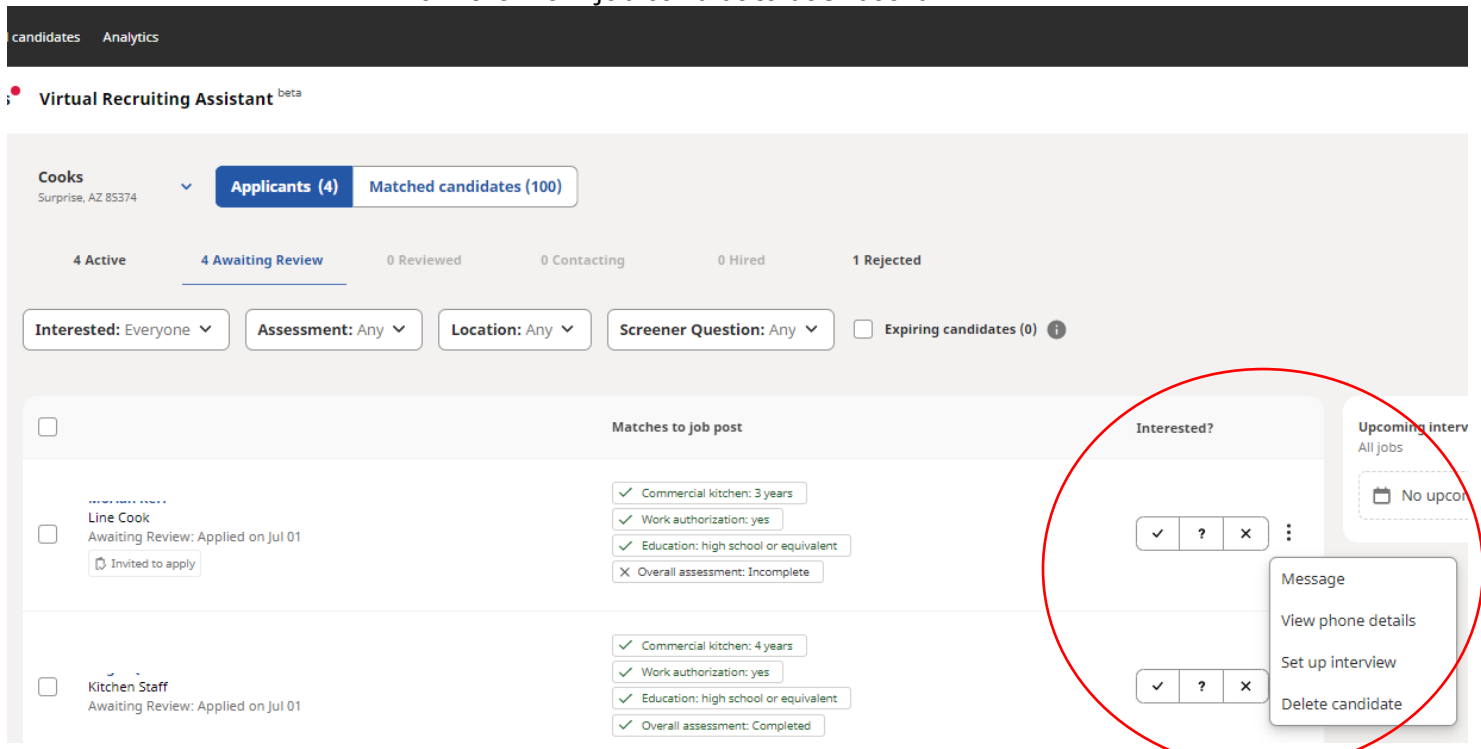
- v. **Candidate Notes:** If a note is made on a candidates profile the notes will appear under the candidates name in the job posting dashboard view.
- c. **Matches to job post:** This column will reflect how the candidate responded to the Applicant Qualifications Questions that were set up with the initial job post. *These are the preferred or required factors listed in the job description under Education and Experience.

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d. Interest:

i. Candidates can be marked by hiring manager in terms of interest in two different ways:

1. From the main job candidate dashboard



2. Or the individual candidate profile (See Section 4. 2. c. iii)

ii. Interested?:

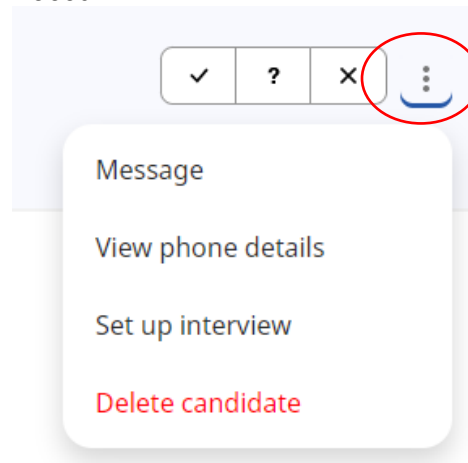
1. Managers can mark their level of interest in the candidate accordingly:

i. ✓= Interested

ii. ?= Maybe

iii. X= Will move candidate automatically to rejected

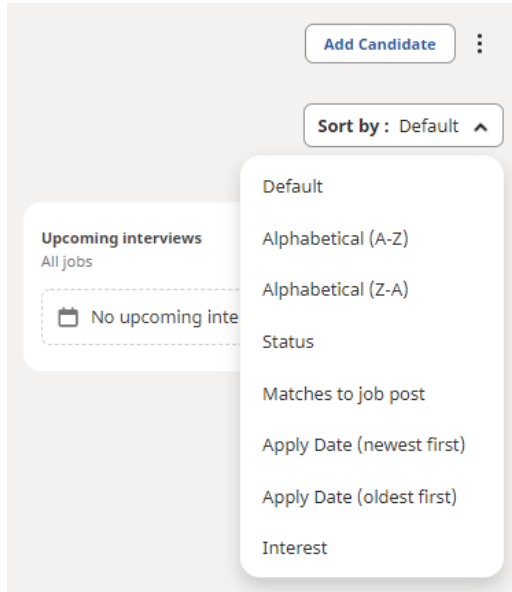
2. 3 vertical dot menu: Selecting anything in this menu will redirect you to the individual candidate profile where all the candidate specific information and resume can be viewed. This is also where candidate notes can be made, and messaging can occur.



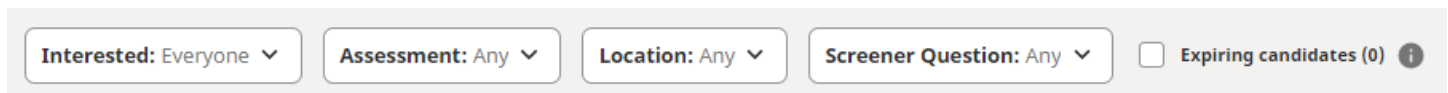
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3. Job Candidate Sorting/Filtering

- a. Sorting can be done by the Sort by menu in the top right-hand corner by
 - i. **Name:** Alphabetical (A-Z) or (Z-A)
 - ii. **Status**
 - iii. **Matches to job post** (individual or multiple criteria)
 - iv. **Apply Date** (newest first or oldest first)
 - v. **Interest**



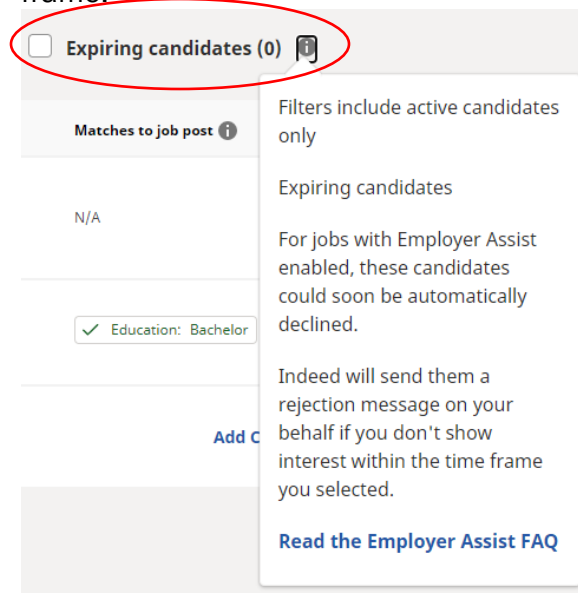
- b. Filtering can be done through the candidate filtering bar above the list of candidates according to the following criteria:



1. **Interested:** Candidates can be filtered by hiring manager candidate review ratings.
2. **Assessment:** Will filter those who completed the applicant screenings assigned when the job post was created.
 - a. If two screenings were assigned this can be filtered by the individual screening results.
3. **Location:** Candidates can be screened by what location is marked on the individual resume of where the candidate lives.
4. **Screener Question:** Will filter according to the education, experience, and credential requirements assigned (according to Preferred or Required details in the job description and additional details requested by hiring manager) when the job post was created.
 - a. If education, experience, or credentials are required for a position a candidate qualification question is set up when the job post is created. If the applicant answered unfavorably to the question the candidate is immediately filtered to the **Rejected** candidates. Keep in mind these preferred or required features need to be reflected in the job description.

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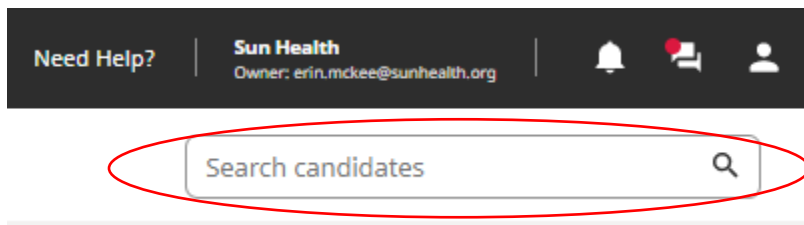
5. **Expiring candidates:** This is a filter based on an Indeed feature called Employer Assist which Sun Health does NOT currently utilize. This feature eliminates candidates automatically after a delegated timeframe if a manager does not address candidates within the Indeed platform within the time frame.



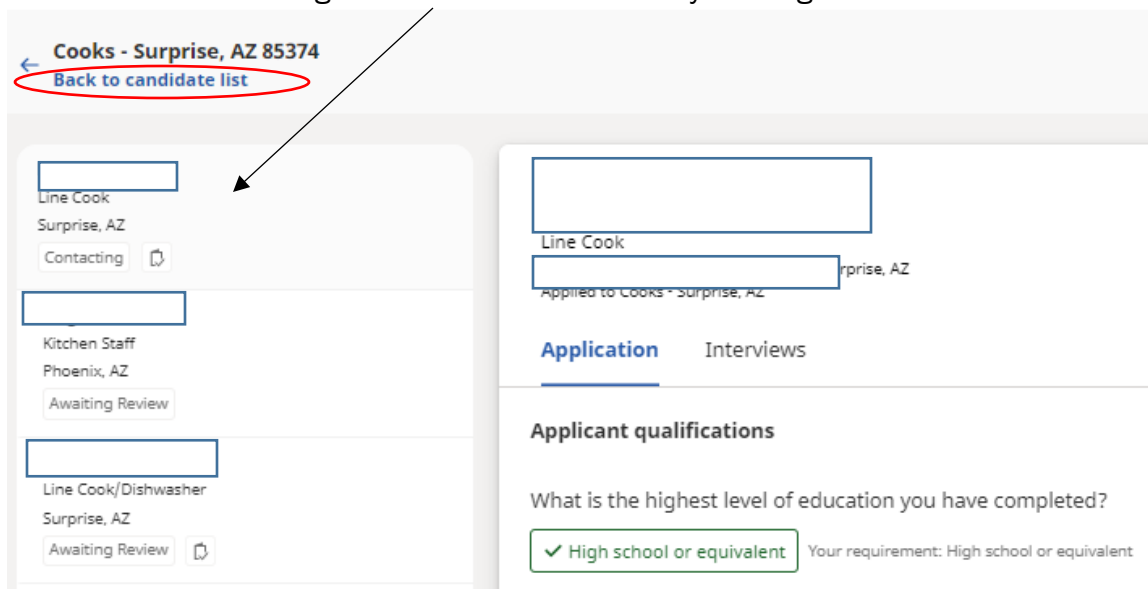
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Section 4: Individual Candidate Search, Profile and Communication Tools

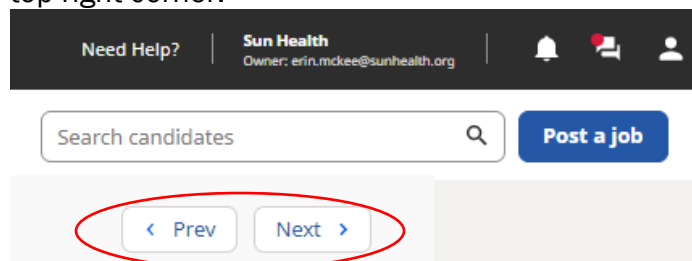
1. **Search candidates:** There is also the option for easy access to individual candidates who have applied for Sun Health positions. This search pulls all candidates from all jobs (open, paused and closed) within the Sun Health account.
 - a. In the top left corner, there is a search box with **Search candidates** in it. Simply type in the name of the candidate you wish to view then click on the magnifying glass or hit enter on your keyboard.



2. **Individual Candidate Profile:** From the Job Post Dashboard, the individual candidate profile can be accessed by clicking on the individual's name. This will redirect you to a new screen with all of the detailed individual candidate information.
 - a. **Navigate candidates:** In the candidate profile you can toggle through the different candidates by
 - i. navigating through the column on the left side of the screen without needing to go back to the Job Post Dashboard.
 1. You can go back to Job Dashboard by clicking on **Back to candidate list**



- ii. You can also navigate by clicking on the <Prev (Previous) and Next> options in the top right corner.



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b. Candidate Information

i. **Application** tab: This section allows you to view the individual candidates.

1. **Applicant qualification** are the responses to the applicant qualification questions asked of every candidate when they apply.

Applied to Cooks - Surprise, AZ

Application Interviews

Applicant qualifications

What is the highest level of education you have completed?

✓ High school or equivalent Your requirement: High school or equivalent

Do you have a valid AZ Level 1 Fingerprint Clearance Card or ability to obtain?

✓ Yes Your requirement: Yes

Do you have a valid ServSafe certification or ability to obtain?

✓ Yes Your requirement: Yes

Do you have a valid Maricopa County Food Handlers card or ability to obtain?

✓ Yes Your requirement: Yes

2. **Skills test/Assessments** results.

a. If the candidate did not complete the assessments, they can be sent again by **Copy Invite URL** and pasting it into a message or email.

Assessments

Overall rating level - Incomplete

 Caregiver fit - Incomplete

[Copy Invite URL](#)

3. **Resume** and Cover Letter (if available). If the resume does not automatically populate on the screen, you can **Download resume**.

Resume

[Download resume](#)

- ii. **Interviews** tab: Interviews can be scheduled directly through Indeed for phone, in-person, or video/virtual interviews (which can be done through a computer or mobile smartphone). See *GUIDE: Indeed Interview Options*

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- c. **Other Review Actions:** The column on the right side of the screen provides additional actions to address the candidate:

The screenshot displays the 'Other Review Actions' section of the Indeed Manager interface. At the top, there is a blue button labeled 'Schedule interview' with a calendar icon, and a white button labeled 'View number' with a phone icon. Below these is an 'Interested?' section with three buttons: a checkmark, a question mark, and an 'X', followed by a vertical ellipsis menu. A dropdown menu shows the current status as 'Contacting'. Underneath is a 'Notes' section with a text input field containing the placeholder 'Write your note here...' and a 'Save note' button. A date separator 'Jul 1' is followed by a notification: '[redacted] accepted your invitation to apply to Cooks'. Below this is a list of other jobs the candidate has applied to: 'Cook - Sun City West, AZ' (Applied Dec 5 2020, Status: Awaiting Review), 'Cook - Surprise, AZ' (Applied Dec 4 2020, Status: Rejected), 'Housekeeper/Laundry Attendant - Surprise, AZ' (Applied Dec 29 2020, Status: Awaiting Review), and 'Kitchen Steward - Surprise, AZ' (Applied Dec 1 2020, Status: Reviewed).

- i. Direct link to the **Schedule the interview** section.
- ii. View the candidates' phone number and note if they answered your call.

This screenshot shows a modal window for the 'View number' action. It features a blue header with a phone icon and the text 'View number'. The main content area has a light gray background and contains the text 'You can call this candidate at' followed by the phone number '+1 602-' and a text input field for the area code. Below this, it asks 'Did they answer your call?' with two buttons: 'Yes' and 'No'.

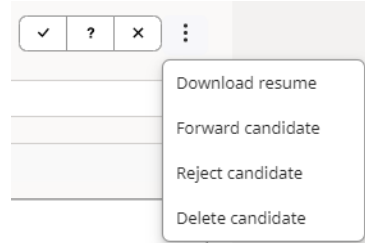
- iii. **Interest status:** This section allows you to address your interest in and the status of the candidate.

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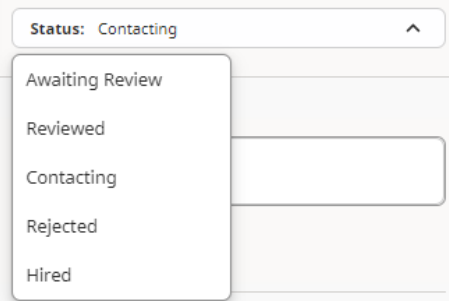
- i. ✓= Interested
- ii. ?= Maybe
- iii. X= Will move candidate automatically to rejected

iv.

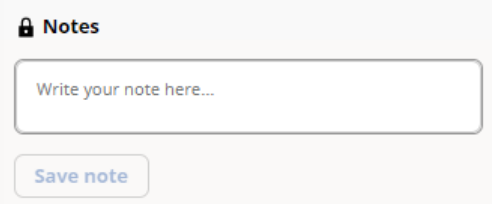
1. The 3 dot menu also allows you to complete the following actions:



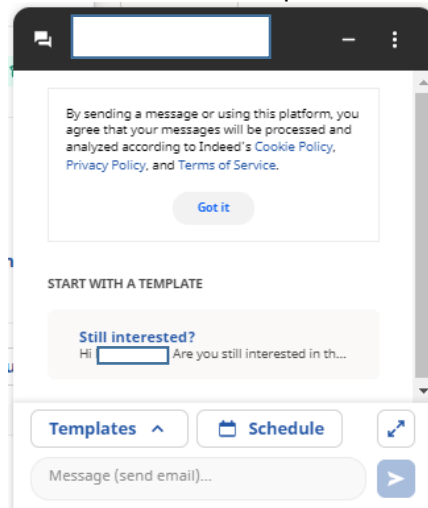
- v. **Status:** You are also able to update the candidate status



- vi. **Notes** *These can be seen by anyone with manager access to the Sun Health account. Appropriate use would be when the candidate was called, interviewed, no call no show, and other candidate notes about desired position details such as full-time/part-time, days and hours preferences.



- vii. **Previous application status:** This section shows if the candidate applied for any other positions, when, and what the candidate status was for each position applied for.
- viii. **Message:** This option allows direct messaging to candidates as an email with communication Templates.



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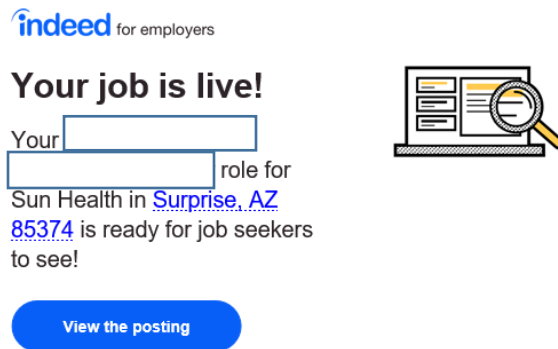
Section 5: Indeed Email Notifications:

Indeed will send notification emails for the following situations:

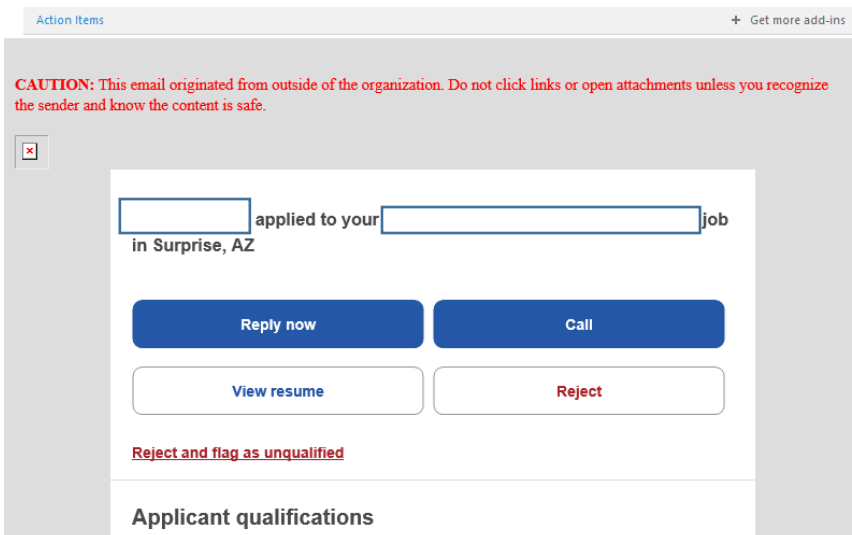
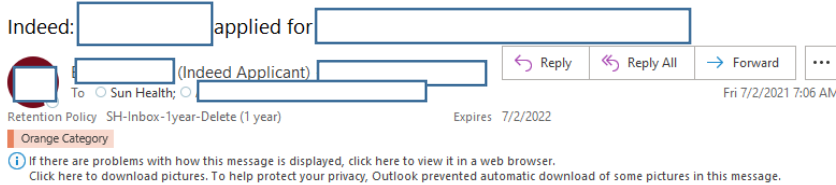
1. **Post is live on Indeed:** This email will notify the direct hiring manager assigned to the job post and the Talent Acquisition Manager that the post is live and the posting is available to view.
*Typically job posts take 3-5 hours to go live from the time it is completed by the Talent Acquisition Manager.



CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.



2. **Candidates Applied:** This email will be sent every time a candidate actively applies for a position. Resume Candidates and will all you to Reply, Call, View Resume and/or Reject



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- Candidates waiting for review:** These emails will notify when have candidates to be reviewed through the Indeed platform. A direct link can can be accessed by clicking on **Review new candidates**.

Candidate update: [redacted]

Indeed for Employers <employers-noreply@indeed.com> [Reply] [Reply All] [Forward] [More]

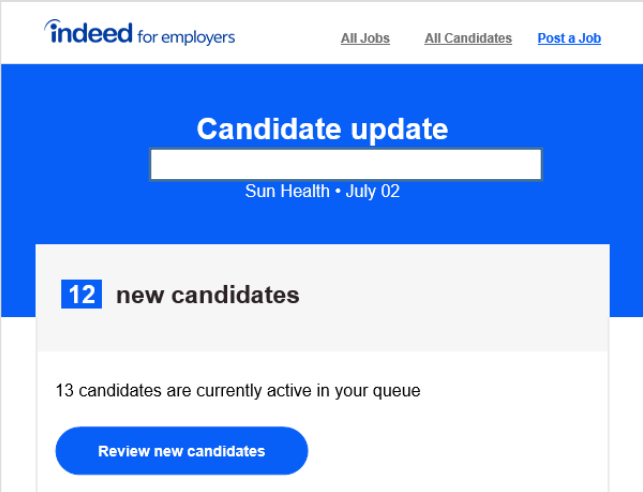
To Erin McKee Sat 7/3/2021 12:35 PM

Retention Policy SH-Inbox-1year-Delete (1 year) Expires 7/3/2022

Orange Category

If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.



indeed for employers All Jobs All Candidates Post a Job

Candidate update

[redacted]

Sun Health - July 02

12 new candidates

13 candidates are currently active in your queue

[Review new candidates](#)

- Candidate completed skill tests/assessments:**

See results for the assessments you sent to [redacted]

Indeed.com [redacted] <donotreply@indeed.com> [Reply] [Reply All] [Forward] [More]

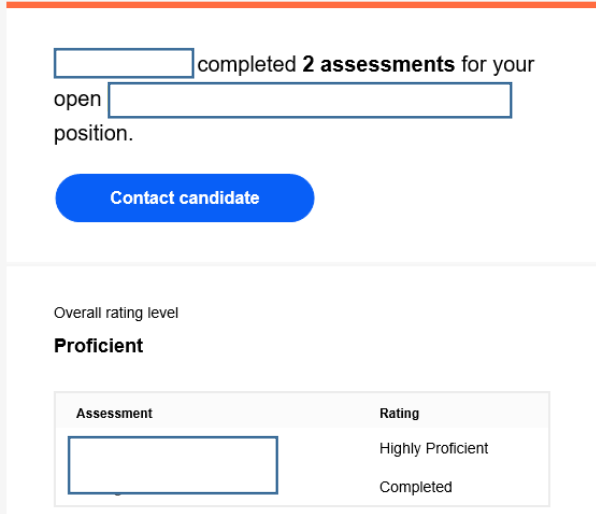
To Erin McKee Fri 7/2/2021 12:07 PM

Retention Policy SH-Inbox-1year-Delete (1 year) Expires 7/2/2022

If there are problems with how this message is displayed, click here to view it in a web browser.

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.



[redacted] completed **2 assessments** for your open [redacted] position.

[Contact candidate](#)

Overall rating level
Proficient

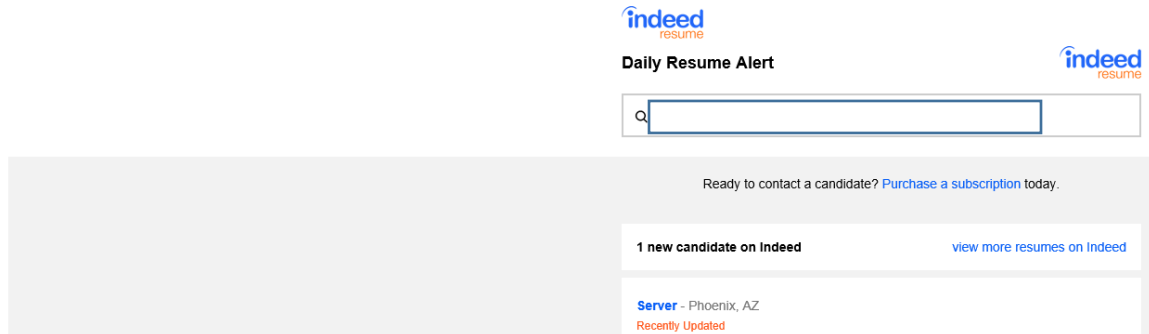
| Assessment | Rating |
|------------|-------------------|
| [redacted] | Highly Proficient |
| [redacted] | Completed |

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5. **Resume Candidates:** These are the types of emails received when there are candidates that match/communicate interest in job posts during sourcing efforts:
- Resume Alerts:** This type of email will be received when there are candidates within the Indeed platform that match the job post parameters. These candidates would need to be accessed through Indeed Resume and the Talent Acquisition Manager would need to be involved to reach out to candidates.

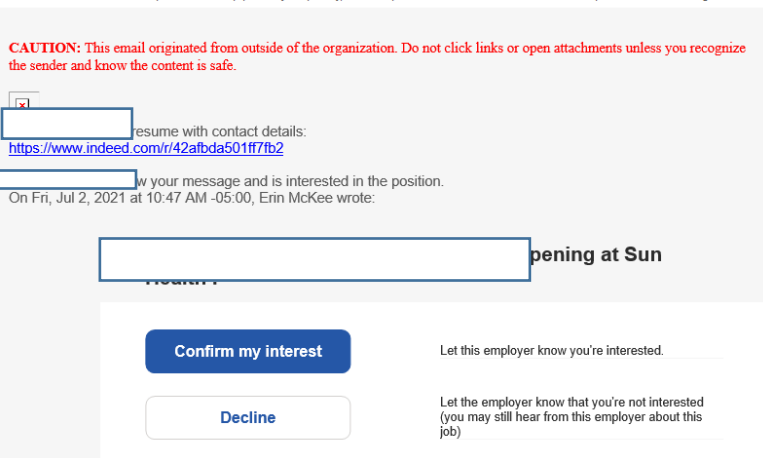
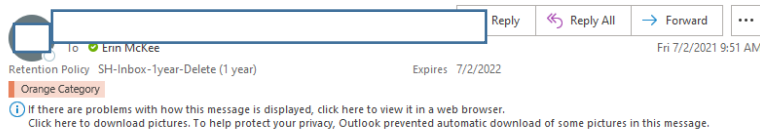
From: Indeed Resume Alert [mailto:alert@indeed.com]
Sent: Sunday, April 18, 2021 6:37 AM
To: [redacted]
Subject: 1 new server resume in litchfield park, az

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.



- Resume Sourcing Interest:** These candidates have been contacted through a Talent Acquisition Manager (TAM) sourcing project and have expressed interest in learning more about the position. The TAM only has one contact to reach out to these candidates so these candidates should be contacted urgently by the direct hiring manager to engage the candidate in regard to interest with the position. The TAM will directly email these candidate resumes to you when the project is set up.
 - *These candidates may have not technically applied, so encouragement to do so may be necessary to compare them to other candidates who have applied and have them complete the skills test/assessments requested of the position.

RE: Start a conversation with Sun Health



Section 6: RELATED RESOURCES: *GUIDE: Indeed Interview Options; June 2021 LEAD: Recruitment, Interview & Selection; RESOURCE: LEAD Recruitment, Interview and Selection Manager Overview and Resources*