



Account Customization Options

For use with Chequed.com

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The Chequed.com Mission

Chequed.com adapts to your business goals. Below you will read about the account configurations that are available to you within Chequed and how to utilize these tools available to you. You can choose to set these up prior to your account provisioning or address them after your account is up and running. Contact your Client Success Manager anytime for more information. We look forward to assisting you with your account.

User Rights

Chequed.com has created a hierarchy designed to simplify your companies' user accounts with the creation of two levels. Your Client Success Manager will ask at the time of provisioning to differentiate your account users.

-  **Regular Users:** general user account with restricted abilities
-  **Company Administrator:** higher-level user account with no restrictions

Regular User:

This general level provides basic user access rights within Chequed.com. This user has access to records only for the positions that they have been granted access to and/or created on their own. The Regular User may:

-  View candidate/reference records and reports in positions they have created and/or assigned
-  Invite candidates to assigned positions
-  Remind candidates in assigned positions
-  View company information on Analytics Page
-  Use the sourcing tool to look up candidates and/or references they have access to
-  Edit their own profile

Company Administrator:

This advanced level includes access rights to all records within your account. These functions are available within the Settings tab. A Company Administrator can perform the same actions as a Regular User with the inclusion of the following functions:

-  Adding/modifying other users
-  Assigning Regular Users to open positions they did not create
-  Change status of Positions (Open, Close, Archive)
-  View/Modify: Company Preferences and Email Templates

Candidate Account Activation Page

When a candidate enters their Chequed dashboard they are presented with simple instructions on how to proceed. Don't want to use these 'out-of-the-box' instructions? Have a specific message you want to convey to your candidates? No problem!

Via a very simple user interface located in **Settings – Company Templates** you will be able to make changes in minutes!



Welcome!

Thank you for your interest in **HERMES GPE!** Please fill out the information below to continue your application.

Candidate Dashboard

When a candidate enters their Chequed dashboard they are presented with simple instructions on how to proceed. Don't want to use these 'out-of-the-box' instructions? Have a specific message you want to convey to your candidates? No problem!

The simple **Candidate Dashboard** interface can be located in **Settings- Company Templates**.

Candidate Dashboard

Welcome! Scroll down to 'My Status' to view your application(s)

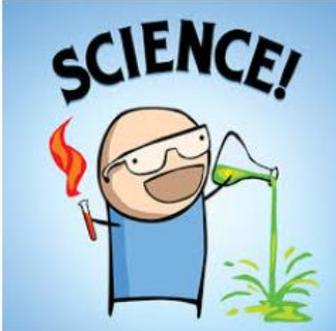
- You may be required to complete more than one step or assessment
- Click Start to begin each step
- Additional directions will be available once you click Start
- The status of each step is indicated below its name
- *You must complete all steps for your application to be considered completed!*

My Status

Default Dashboard

Candidate Dashboard

Welcome! Thank You for applying to Kramek Laboratories! The leader in all things.....



You must complete each module for your application to be COMPLETE.

Scroll down to 'My Status' to view your application(s)

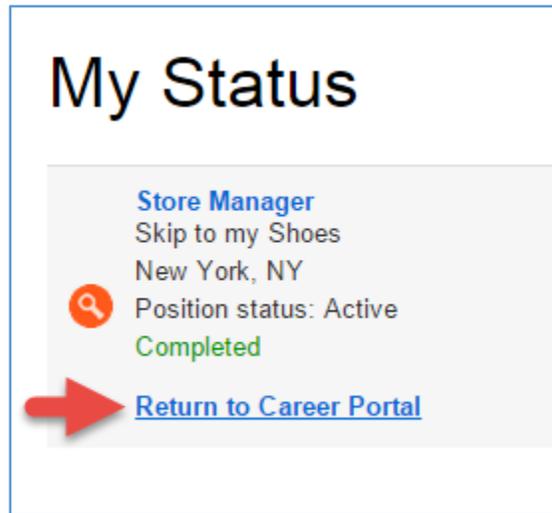
- Click Start to begin each step
- Additional directions will be available once you click Start
- The status of each step is indicated below its name

Customized Dashboard

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Career Portal

This feature allows you to add a website link into the Candidate Dashboard. When your candidate completes their assessment, **they can be redirected to your career portal**. *Contact your Client Success Manager to add this feature to your Chequed.com account.* We require the website link and the text provided to install this function.



Customized Email Templates

Chequed.com products use email templates that are pre-programmed to brand to your company within ours. We include substitution values to customize the candidate and reference experience. These templates are available for modification within your account: **Settings – Email Templates**. You can create personalized messages from your company to the candidate and include substitution values that can be added or deleted, depending on your preferences.

We recommend reviewing these templates and make alterations as needed. This area is open for you to make changes at any time, you can always contact us if you require support. Please see examples on following page.

Email Template Details

From **Manager**

To **Candidate**

Subject **{positionName} job at {companyName}**

 Edit

{candidateFirstName},

Thank you for your continued interest in {companyName}.

We use an online process for reference checking to keep things moving efficiently.

Please read the directions below to get an understanding of the reference checking process. After reading the directions, click the link at the end of this email to begin:

1. You may be asked to complete a self assessment with questions designed to understand your fit to the job and to understand some of the questions we'll be asking your references. It is important to answer honestly. Rating yourself artificially high will not help your candidacy as the answers, when combined, are compared against an underlying job profile.
2. Add the names and contact information for at least {numberOfReferences} professional references. Our system will send them an email (which you may edit if you like), with a link to some questions about you. Their answers will be reported anonymously. We will not be able to tell which reference gave which answers.

Example of Template with Substitution Values

Baker job at Christine's Bakery

1 message

Christine TEST <noreply@chequed.com>
Reply-To: noreply@chequed.com
To: vivian.vinett@gmail.com

Thu, Mar 27, 2014 at 3:30 PM

Vivian,

Thank you for your continued interest in Christine's Bakery.

We use an online process for reference checking to keep things moving efficiently.

Please read the directions below to get an understanding of the reference checking process. After reading the directions, click the link at the end of this email to begin:

1. You may be asked to complete a self assessment with questions designed to understand your fit to the job and to understand some of the questions we'll be asking your references. It is important to answer honestly. Rating yourself artificially high will not help your candidacy as the answers, when combined, are compared against an underlying job profile.
2. Add the names and contact information for at least 5 professional references. Our system will send them an email (which you may edit if you like), with a link to some questions about you. Their answers will be reported anonymously. We will not be able to tell which reference gave which answers.

Example of Template with Substitution Values Populated

Candidate Thank You Page (ChequedFit™ Only)

Increase sourcing and brand visibility by customizing your Candidate Thank You page. All of your candidates will land on this page after they have completed the required Chequed steps.

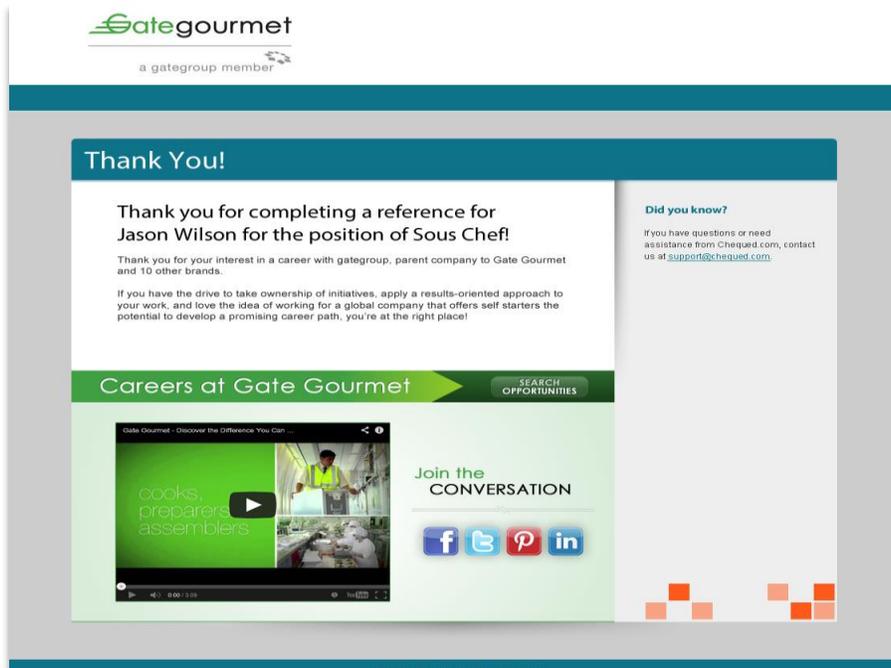
This is available in your account under **Settings – Company Templates**. Have a dedicated IT department? This feature includes the advanced ability to script a webpage within the Thank You page using HTML. Want to provide a basic message? Keep your message sweet and simple by using the formatting platform provided.



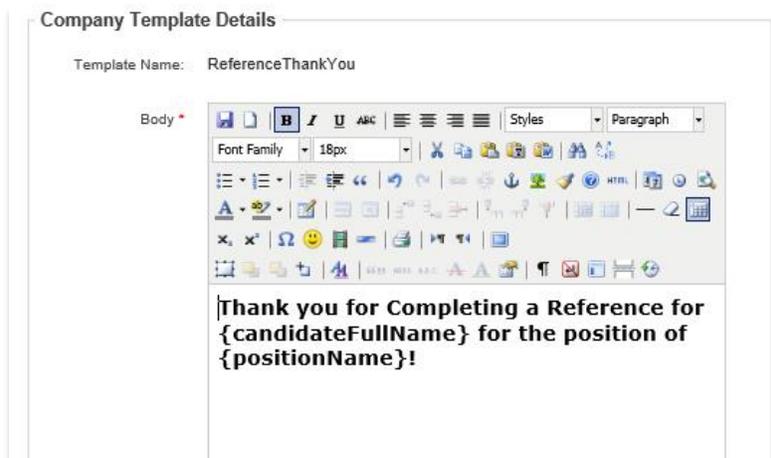
Candidate Thank You Page

Reference Thank You Page (ChequedReference™ Only)

Increase sourcing and brand visibility by customizing your Reference Thank You page. This is available in your account under **Settings – Company Templates**. Have a dedicated IT department? This feature includes the advanced ability to script a webpage within the Thank You page using HTML. Want to provide a basic message? Keep your message sweet and simple by using the formatting platform provided.



Interactive Website within the Reference Thank You Page (Courtesy of Gate Gourmet)



Easy to use formatting template available with substitution values

Release References (ChequedReference™ Only)

Once a candidate enters the required information on each of their references (including a valid email address), you have a choice as to *when* the email invitations are sent from the system to the references.

- 🎯 **Release Immediately:** The invitation emails will be sent to the reference as soon as the candidate enters the required information about the reference.
 - This option is best when ChequedReference™ is the only front-end Chequed assessment in use during the selection process.
- 🎯 **Hold for Later Release:** The reference information is stored in Chequed and the invitation emails will only be sent to the references when your recruiters or system users manually release them.
 - This option is useful for companies who use multiple front-end Chequed assessments and want to monitor ChequedFit™ scores for example and decide which candidate they will initiate a reference check for.



Number of References Requested (ChequedReference™ Only)

This is the minimum number of references that the candidate is asked to provide up-front. The default setting is to ask the candidate to provide five references. *It is recommended to ask for more references than required* because some reference providers may not complete the assessment.

Number of References Required to Generate a Report (ChequedReference™ Only)

This setting defines how many reference assessments must be completed before the system automatically generates a reference report on a candidate. The default setting is to require three completed reference assessments so that there is feedback captured from a reasonable number of different sources. Not all references may have the same experience with the candidate, so it is recommended to gather more than one point-of-view.

Reference Self-Assessment (ChequedReference™ Only)

You have the ability to require candidate to complete the same assessment as their references. This would be the first step in the candidate's ChequedReference™ process, followed by asking them to add all of the required information for their references. The self-assessment that the candidates take is *not* factored into their ChequedReference™ score, but it does provide you with an interesting point of comparison within the report as to how the candidate rates themselves versus how each of their references rates them. *It is highly recommended that this is disabled if other modules are used with ChequedReference™.*

Confidentiality (ChequedReference™ Only)

You can decide whether you want references' individual answers to be reported anonymously*. If you decide to enable confidentiality, individual responses will not be linked to the reference provider's name — they will simply be reported as "Reference 1", "Reference 2", etc.

- Ensuring anonymity of responses can give reference providers more confidence to be candid in their feedback.

1. Sam follows through on promises to others.						
	Well Below Average	Slightly Below Average	Average	Slightly Above Average	Well Above Average	Outstanding, One of the Best
Reference 1				✓		
Reference 2						✓
Reference 3					✓	
Reference 4						✓

A sample section of the ChequedReference™ Report when confidentiality is enabled

* Whether you choose to enable confidentiality or not, there is a separate section on the ChequedReference™ Report where you will have a list of the reference providers including their basic contact information and relationship to the candidate.