

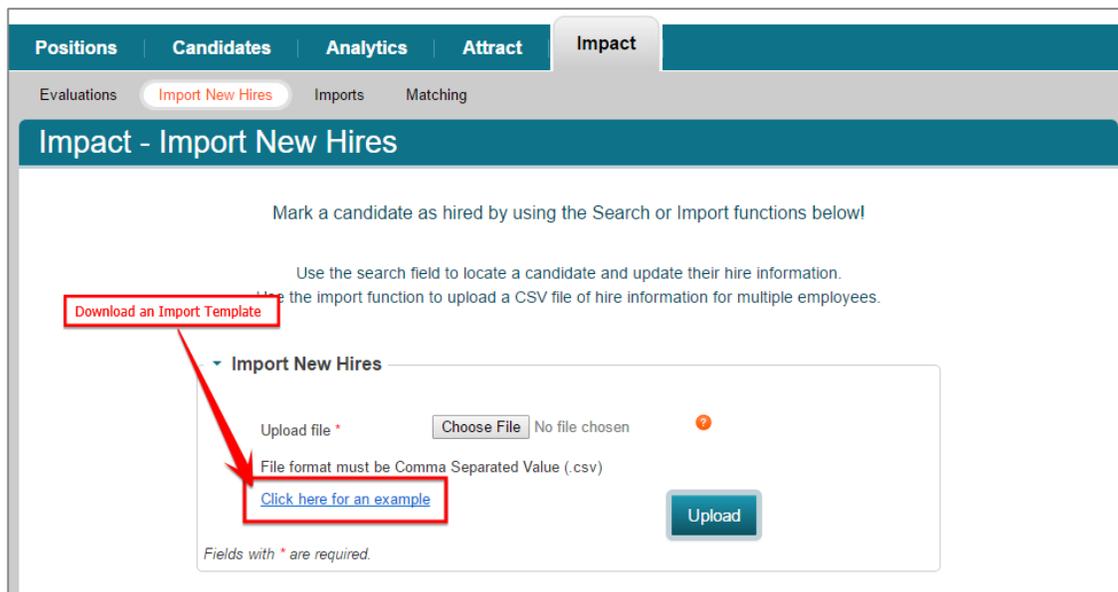
## Impact File Import Instructions

### Step One: Fill Out the Import Template

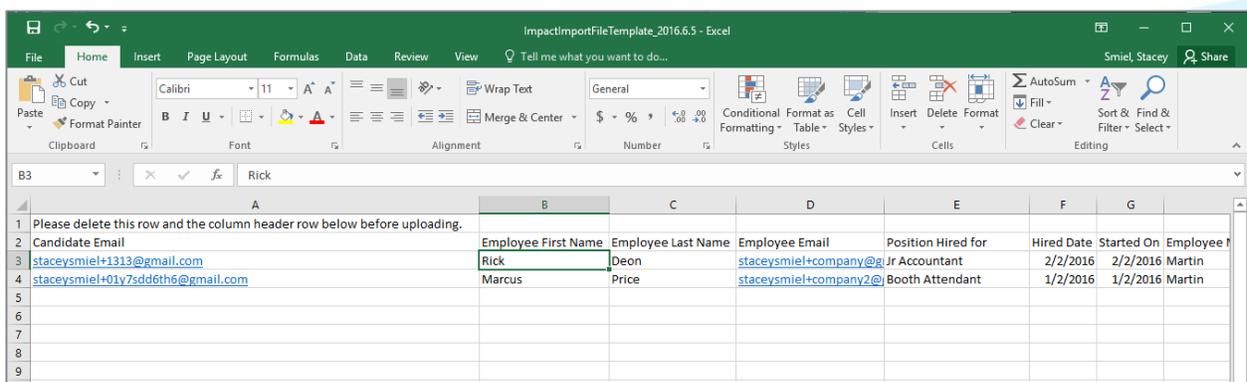
Utilize the Impact File Import template to place the required and optional information into the correct format.

Note: You can download a template directly from your account at any time by navigating to the Impact tab, clicking on the 'Import New Hires' sub-section, and then clicking on 'Click here for an example'.

*Download an Import Template from Within Your Account*



*Import Template Contains Sample Records*



Employee First Name	Employee Last Name	Employee Email	Position Hired for	Hired Date	Started On	Employee ID
Rick	Deon	staceysmiel+company@g	Jr Accountant	2/2/2016	2/2/2016	Martin
Marcus	Price	staceysmiel+company2@	Booth Attendant	1/2/2016	1/2/2016	Martin

The Import Template contains sample records which will be used as guidance for how to format the candidate information. Use the guidelines below to ensure that the Import Template is filled out correctly.

**Import Template Guidelines to follow:**

- **Do not add or move any of the column headers**
  
- **Place the applicable information into the appropriate columns**
  
- **The following fields are required:**
  - Candidate Email
  - Employee First Name
  - Employee Last Name
  - Employee Email (i.e. company email address)
  - Position Hired For
  - Hired Date
  - Started On
  - Employee Manager First Name
  - Employee Manager Last Name
  - Employee Manager Email Address
  
- **Ensure that Hired On Date is the same as or earlier than Started On Date**
  
- **Compensation is numerical only**
  - Do not use any symbols (i.e. \$ or ,) in the Compensation Field
  
- **Compensation Currency should match *exactly* one of the following terms:**
  - US Dollar (i.e. do not use “US” or any other form of the term)
  - Australian Dollar
  - Canadian Dollar
  - British Pound
  - Euro

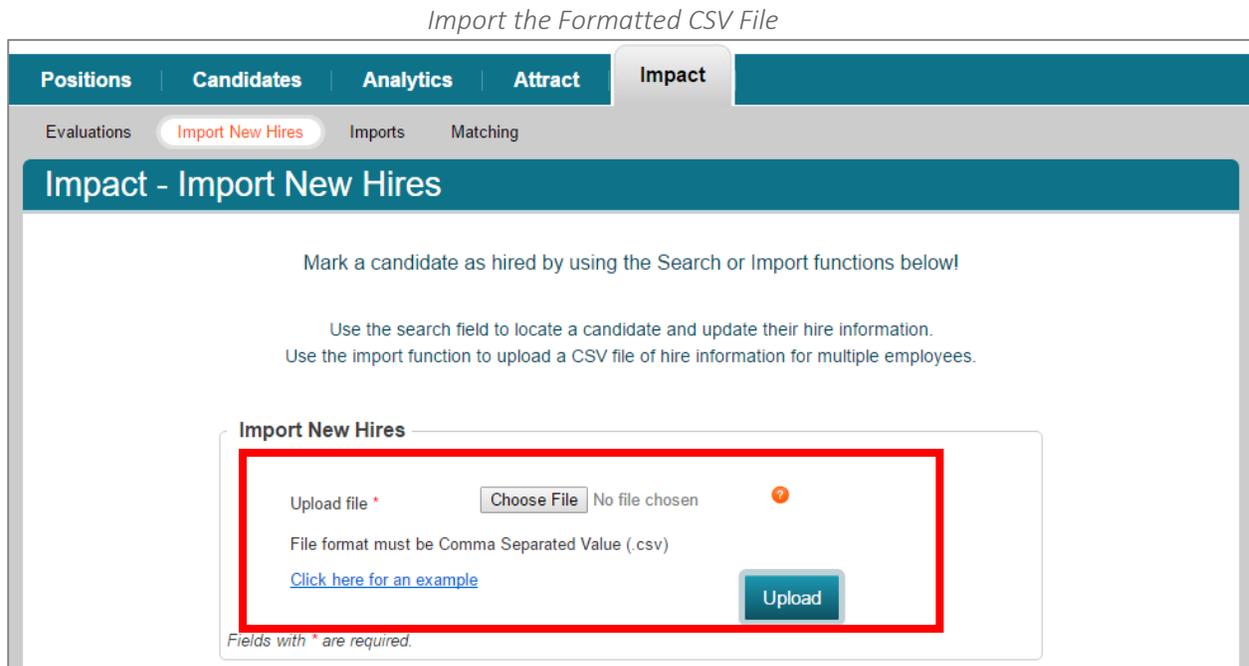
*Additional options exist. Please contact OutMatch for your exact currency terminology.*
  
- **Compensation Period should match *exactly* one of the following terms:**
  - Annually (i.e. do not use “annual” or any other form of the term)
  - Monthly
  
- **Delete the first row (directions) and the second row (column headers) before saving the final CSV file**

## Step Two: Upload the CSV File

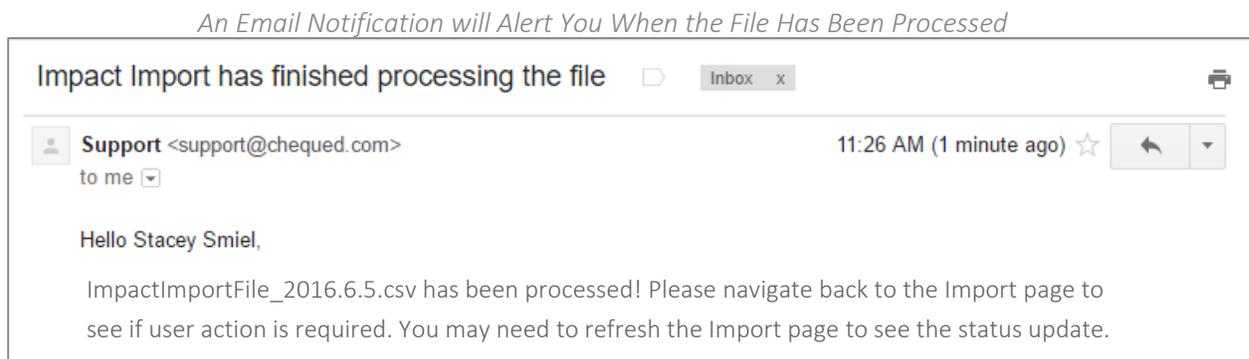
Within your account, click on the Impact tab then choose the 'Import New Hires' sub-section.

Click the 'Choose File' button and locate the CSV file of candidate information.

Click Upload.



The file may take some time to be processed by the system. You will receive an email once the file has been processed letting you know to check back and see if user action is required.



### Step Three: Confirm Whether User Action is Required

Within your account, click on the Impact tab then choose the 'Import New Hires' sub-section.

If you've kept this page open, you may need to refresh it after receiving your notification email to see that status change.

If the status is "User Action Required" then click on the pencil icon.

*If the File Status is 'User Action Required' then click on the Pencil Icon*

▼ **Past Imports**

File Name	Date	Status	
<a href="#">ImpactImportFileTemplate_2016.6.5-TEST.csv</a>	June 5, 2016	User Action Required	

[Show All Imports](#)

The system will walk you through the major steps of taking action.

In the **first stage**, you will be presented with **approximate matches**. In most cases, these are candidates that the system has located but there is a discrepancy in the name of the position that they're being hired for.

*Match the position names to ensure that the candidate record is accurate*

#### Impact - Import New Hires

**Upload Details** | **Step 1: Approximate Matches** | **Step 2: No Matches** | **Step 3: Review**

Listed below are candidates found in the import file whose position name does not match completely with the system records. Select the correct position name from the list and then click the Apply button. Please apply the change to one candidate record at a time.

Once you address all records, please click forward to Step 2

Filter by:  [Clear](#) 

Name	Email Address	Your Position	Chequed Position Name	
Marcus Price	staceysmiel+01y7sdd6th6@gmail.com	Booth Attendant	<input type="text" value="Match to Existing Chequed Job"/> <input type="text" value="Match to Existing Chequed Job"/> <input type="text" value="Booth Cashiers - Denver"/>	<input type="button" value="Apply"/>
Rick Deon	staceysmiel+1313@gmail.com	Jr Accountant	<input type="text" value="Match to Existing Chequed Job"/> <input type="checkbox"/> Save and Use this Position Matching 	<input type="button" value="Apply"/>

Use the drop down to choose the Chequed Position Name that matches the position name used in your import file.

To save this matching for future use, click the box next to 'Save and Use this Posiiton Matching'.

Click the Apply button.

Name	Email Address	Your Position	Chequed Position Name
Rick Deon	staceysmiel+1313@gmail.com	Jr Accountant	Junior Accountant - Denver <input checked="" type="checkbox"/> Save and Use this Position Matching

Once you work through all of the Approximate Matches, move to the **second stage: No Matches**.

Here you will find a list of the candidate records that have no matches in the Chequed system.

The system matches based upon candidate email address, candidate first and last name, and position.

What to do if there are candidate records with no match:

- It is possible that these are candidates that do not have information in the Chequed system, in which case you can ignore these records.
- It is also possible that the candidate email and candidate first/last name are different in your file than they are in the Chequed system. You can make note of these affected candidates and double-check the information you put in the Import file for them, make any applicable edits, then re-try the upload at a later time.
  - Click 'Export to CSV' to export a file of these affected candidates.

*Candidate records with no match may need to be edited and then uploaded again later.*

### Impact - Import New Hires

**Upload Details** | **Step 1: Approximate Matches** | **Step 2: No Matches** | **Step 3: Review**

Listed below are individuals that were included in the import and could not be located in our database. It is possible that these candidates used a different email address during the application process than the one included in the import. No further action can be performed against these individuals currently, please correct the information included in the import file and try to import these candidates again.

Filter by:  **Clear**

Name	Email Address	Your Position
Dana Markus	staceysmiel+nomatch@gmail.com	Manager

The final stage is Review.

This is a list that can be used to confirm which candidate records were successfully marked as hired within the Chequed System.

You can click 'Export to CSV' to export a file of these successfully updated candidate records for confirmation and for future reference.

**Impact - Import New Hires**

Upload Details | Step 1: Approximate Matches | Step 2: No Matches | Step 3: Review

This page contains a summary of individuals that the system was able to match successfully. These candidates have been marked as hired and no further action is required and you can log out at any time.

Filter by:  Clear ?

Name	Email Address	Your Position
Marcus Price	staceysmiel+01y7sdd6th6@gmail.com	Booth Cashiers
Rick Deon	staceysmiel+1313@gmail.com	Jr Accountant

Export to CSV

## That's It!

No further action is required on your part. You can log out at any time.

The system will launch out the surveys at the appropriate time.