Ability to Close Checkup Early and Reopen a Report

Introduction Description Configuration/Setup How to Close a Checkup Early? How to Reopen a report?

Introduction

Do you have scenarios where a candidate is not able to invite the required number of raters for the checkup or they do not have any prior experience hence do not have a manager or peer to invite to complete a checkup or any other situation due to which the checkup is not getting completed? Would you reach out to Checkster support to help close such checkups?

Do you have situations where a hiring manager is asking for more references for a specific candidate to get a better understanding about them, or would you prefer to have candidate get more raters to complete a checkup and want to reopen the report? Do you reach to Checkster support for completing this action?

Well, this is case for past now! 😄 You, as a Checkster user, can now have complete ownership of the checkup, when to start it, when to close a checkup early or even when reopen a report (for any aforesaid reasons) for a specific candidate.

Description

Complete Checkup Early - When a survey is added to an account, some conditions are set in background on when a checkup should be deemed as auto-complete. For eg.: for a survey to be auto completed, if the minimum requirement is set as 4 surveys to be completed out of 7. Once this condition is met, checkup would automatically get completed and a report will be generated. But if due to any reasons, a candidate might not be able to satisfy these minimum requirement - in this case recruiter/survey owner might want to close a checkup early so as have a report is generated.

Reopen Checkup - Once a report is generated for a completed checkup, recruiter/hiring manager might ask for more references and in such scenario, support would receive a request to reopen the checkup.

To cover both the scenarios above, a new permission level is being introduced which will give the control to the customer to Close Checkup early or reopen a checkup early. Advantage to of the permission would be that customer account admin can control who within their company should have this access.

Configuration/Setup

- Configuration/setup can only be done by user who has Admin access. If you do not have admin rights, please reach out to the Admin within your organisation and they can follow the steps below to grant you the right permissions.
- **() [For Internal Harver use only]** Anyone within Harver who is testing this capability, make sure to switch to Employer View when you log-in into Employer portal!

The customer account admin (system admin) can only grant this permission to a non-admin account user. To do so, they follow these steps:

1. On the Employer portal, go to Settings (1) tab, click on Permissions (2), and then Add Role (3). The default role "Employer Admin SubAccount" cannot be edited and hence cannot be used for this feature.

	home	start new	1 settings	dashboard	I	help
	Settings Portal Preferences Manage Users Manage Groups	Manage Permissions			3	Add Role
2	Permissions Employer Account Style Tailor Email Templates	Role Name	Role Des	scription	Actions	
	Tailor SMS Templates Tailor Surveys	Employer Admin SubAccount	Admin Su	ubAccount Role	<u>_</u> +	
	Tailor Online Shared Report Online Report Sharing Preferences Chart Preferences Address Book Data Usage Template Getting Started Templates Integrations Checkup Subjects Raters All Users Workflow Participant Search					

2. Once you click on "Add Role", it will open a new window. Give the role a name and in the Employer Permission section, for the permission "Checkup.ForceCloseandOpen" mission, assign "Perform any function" and save the role.

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Tailor Surveys Tailor Report Layout Tailor Online Shared Report								
Tailor Online Shared Report	Individual usors							
Report	Add individual users to	role				Company X Admin, Test	Tester	2
Report								
Online Report Sharing	- Employer Permis	sion						
Preferences							Destaur	
Daily Sourcing Email				No access	Read	Edit/remove	any	n
Preferences							functio	n
Chart Preferences	Account Manag	gement	4					
Address Book								
Data Usage Template	AccessRoles	las.		۲	0	0	0	
Getting Started	second to manage to							
Templates	Payment			۲	0	0	0	
Integrations	Allow to see/do ope	ration with payment						
Checkup Subjects	Survey				0	0	0	
Raters	Access to work with	surveys			0	0	0	
All Users	SurveyEraudMa	nagement		~		~	~	
Workflow	Manage employer s	urvey fraud recipient list		0	۲	0	0	
Participant Search								
	Surveys and Re	eports	4					
	Checkup			~	~	~	~	
	Access to work with	n checkups		۲	0	0	0	
	Total							
	Access to test resort	uroes		۲	0	0	0	
	Checkup.Batch Access to work with	h checkup batch processes		۲	0	0	0	
	Checkup.Force	CloseReopen		0	0	0	۲	٦

3. Now add this new role as a permission to the user. This can be done in few ways:

a. If you want to add this permission to select view people within your organisation, you can do so by going to the individual user (through Manage Users), find the user and click on it. In the user page, you can find the permission section at the bottom of the page. Click on drop down next to it, nd select the permission you just created. Remember to click on "Update User" once done.

home st	art new settings	dashboard	sourcing database	nei
Settings				
Portal Preferences	Manage Users			
Manage Users	- Login Details			
Manage Groups	Login becans			
Permissions	Email ID:	joe+test@checkster.com		
Employer Account Style	Password:	Change Password		
Tailor Email Templates	Locked:			
Tailor SMS Templates	Super User:	Restrictions (Modified)		
Tailor Surveys	Admin Bights:			
Tallor Report Layout	Surveys	Manage Survey View		
Report	,-			
Online Report Sharing	Cancel	to Lizer		
Preferences	Cancer	le ober		
Daily Sourcing Email				
Preferences				
Chart Preferences	— Personal Details ————————————————————————————————————			
Address Book	First Name:	Joe		
Data Usage Template				
Getting Started	Last Name:	Test		
Templates				
Integrations	Job Title:			
Checkup Subjects	Company:	Company X		
All Users				
Workflow	Phone:	1		
Participant Search				
	Gancel Upda	te User		
	- Groups	none		
	This user is a part of the fol	lowing		
	Team A	Add questions		
		Close and Reer	on Reports	
	- Personal Roles	Giose and Reop	ien Reports	
	Permission Role	- Employer Admir	n SubAccount	
	associated to this user		roub/locount	
		No Access		
	Cancel Upda	te Uso noneeeee		
		test permission		

b. If you want to assign multiple or all people this permission within your organisation, you can so by making use of Manage Groups. Go to "Manage Users", open an existing group (if you do not have a group, please create one). Add all the users who you want to have this newly created permission, and then in the "Group Roles" section, select the newly created role. Remember to Update the group.

Settings					
Portal Preferences	Manage Group				
Manage Users					
Manage Groups	Group Name Team A				
Permissions	Group ID 200				
Employer Account Style	Automatically exclude 🗸 ne	wly-cre	eated subaccounts		
Tailor Email Templates					
Tailor SMS Templates	- Select the accounts to inc	:lude/	exclude from your group	p	
Tailor Surveys	Include Accounts		Exclude Accounts		
Tailor Report Layout	Search		Search		
Tailor Online Shared	Deedra Bumgarner		Arlene Kennedy	Click on a name to move an	
Report			Chanel Nelson	account into the desired column.	
Online Report Sharing	Kara lest (Locked)		Cynthia TEST		
Preferences	Kayla Sims (Locked)	4	Demo User		
Daily Sourcing Email	Kim Possible (Locked)		Useda Osci		
Preferences	Test Test (Locked)		Hector Qualcoe		
			JAmes CHeckster		
nuuress book Data Lisana Templato			k test		
Gatting Started			kim test		
Templates					
Integrations	 Select all 				
Checkup Subjects					
Raters	- Select the surveys to visit	ne/ nic	Hiddon Sumous		
All Users	Sourch		Search		
Workflow	Search		Search		
Participant Search	Hourly Reference Check		KIM Confirmation of Employment - UK Ire	Click on a name to move an account into the	
			Manager 360	desired column.	
		4	Phys. Release & Authorization		
			testing KAB Nursing Copy		
			KIM TEST First Month Check-in		
			Hourly Reference		
	Select all				
	- Group Poles				
	none				
	Fmplover Admin Si	ibAcci	ount		
	Employer Carrier De		Cancel		
	Employer Super Us	er			
	Add questions		rights reserved.	Terms and Conditions Privacy P	olicy Contact U
	Close and Reopen	Repor	ts		
	No Access				
	noneeeeee				

4. User(s) should now be able to close a checkup early or reopen a check report.

How to Close a Checkup Early?

Once you have the right permissions, follow the steps below to close the checkup.

1. On the Employer home page, click on the status of the candidate you want to close the checkup early.

home	start new	settings	dashboard	sourcing	database	help
Tools	Active Ch	eckups			Search	
Search All Checkups PDF Batch job(s)	Individual	Checkup Owner	Туре	Status	Request	Notes
Frequently Used Reference Checkup General Reference	GDZG SFGSF	self	View Phys. Release & Authorization	Active 0/1]	⊠ <u>Enter Note</u>
Check KIM Confirmation of Employment - UK Ire Jen's General Reference	Dsgds Rfdhgd	kim test	<u>View KIM</u> <u>Confirmation Of</u> <u>Employment -</u> <u>UK Ire</u>	Waiting On Individual To Start Started 11/21/2024	△ <u>Send Reminder</u> Last Email: 11/25/2024 2 Email(s) sent	≌ <u>Enter Note</u>
Check Internal Mobility - Reference	Fghxtfdhggdz Gdgdzfgdfg	self	<u>View KIM</u> <u>Confirmation Of</u> <u>Employment -</u> <u>UK Ire</u>	• Waiting On Individual To Start Started 11/21/2024	 <u>○ Send Reminder</u> Last Email: 11/25/2024 2 Email(s) sent 	≝ <u>Enter Note</u>
Phys. Release & Authorization — Your Surveys	Test Test	self	<u>View KIM</u> <u>Confirmation Of</u> <u>Employment -</u> <u>UK Ire</u>	Active 0/1 Started 11/19/2024	A Send Reminder	⊠ <u>Enter Note</u>

2. This will open a Status portal. From the status portal, click on the Close Checkup Early button.

		CST Admin Survey Detail: 41628 Survey Template: 26 Created by: Company Owned by: Company	60 867 y X Admin (kara+test@test. X Admin (kara+test@test.c	.com) :om)
Participant List	Checkup Status		Checkup Details	
Show 5 v results		Search:		
Name	Relation Candidate vs Rater entered	Status	Entered by	
dfzgdzr fdzhbdrzhgbdz <kimberly.blasdel+fdsjzgndr(< td=""><td>/ ⊉harver.com></td><td>Invited on 11/19/2024 waiting on input</td><td>Candidate</td><td>Û</td></kimberly.blasdel+fdsjzgndr(<>	/ ⊉harver.com>	Invited on 11/19/2024 waiting on input	Candidate	Û
Showing 1 to 1 of 1 entries		First Previous	1 Next	Last
	Give Checkup Ownership Car	cel The Checkup	Complete Reques	st Early

3. Click "OK" on the confirmation window. This will now close the checkup early. You can now find the candidates report in the "Recent Reports" section in the Home page.



How to Reopen a report?

Once you have the right permissions, follow the steps below to close the checkup.

1. On the Home page, from the "Recent Reports" section, click on the candidates "Details" for whom you want to reopen the report.

Recent	Recent reports				
Show 5 ~	results		Search		
Individual	Checkup Owner	Detail	Report	Notes	Request
November12- 3 Test2	self	See Checkup Detail 1/1	View Phys. Release & Authorization	⊠ <u>Enter Note</u>	Share Report
Kim Test	self	See Checkup Detail 1/1	reportLink View KIM TEST First Month Check-In	⊠ Enter Note	Share Report
Jess Sejj Potential Fraud Alert	self	<u>See Checkup Detail 1/1</u>	View General Reference Check	⊠ <u>Enter Note</u>	Share Report
Shrey Jain Potential Fraud Alert	self	<u>See Checkup Detail 1/1</u>	View Management Reference Checkup	⊠ <u>Enter Note</u>	Share Report
Mike Test Candidate	Kara Test	See Checkup Detail 1/1	View Hourly Reference Check	⊠ <u>Enter Note</u>	Share Report

2. Click on Re-open Checkup button at the bottom of Details portal.

Re-open Checkup	×
Once you re-open this Checkup it wi new responses before you can comp	II need to receive the following amount of olete and view the report again: 1
Please save a copy of this individual	's existing report before continuing.
\Box Send the notification to the car	ndidate
	Re-Open Checkup Cancel

3. This should pop-up a confirmation window. Click on "Re-open Checkup" button again; this should now reopen the checkup for the candidate. By clicking on the check box, you can also chose to send a notification to the candidate that their checkup has been reopened.

