Ability to Close Checkup Early and 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.

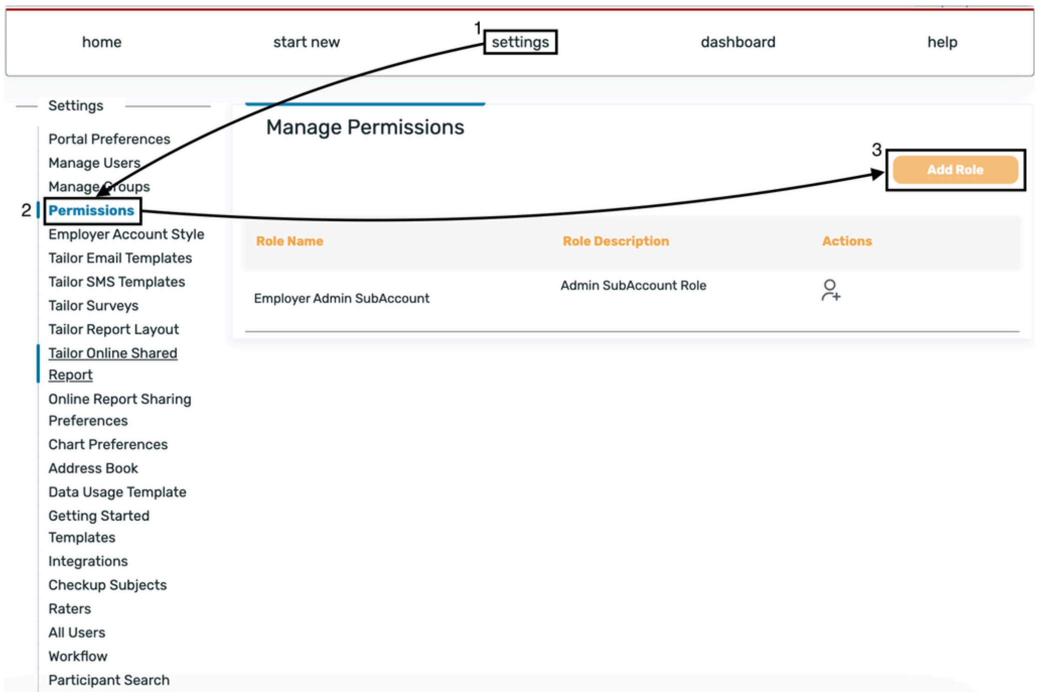
Configuration/Setup

> ℹ 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.

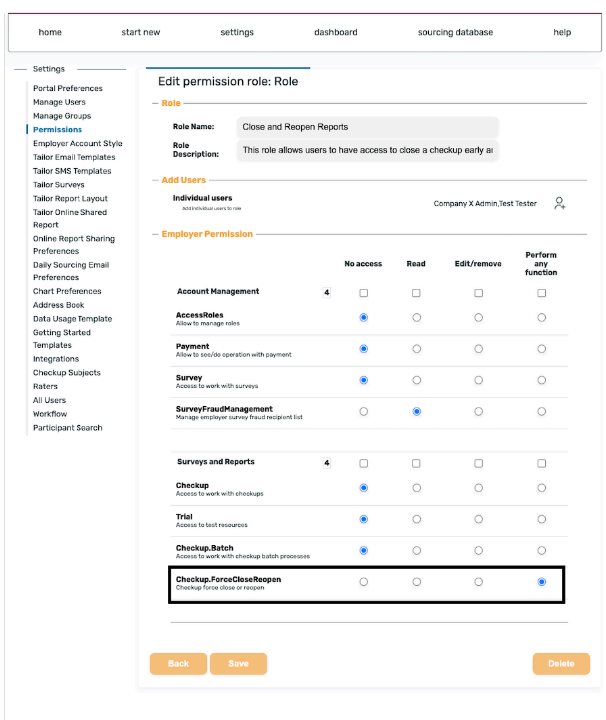
> ℹ **[For Internal Harver use only]** Anyone within Harver who is testing this capability, make sure to switch to Employer View when you log-in into Employer portal!

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.

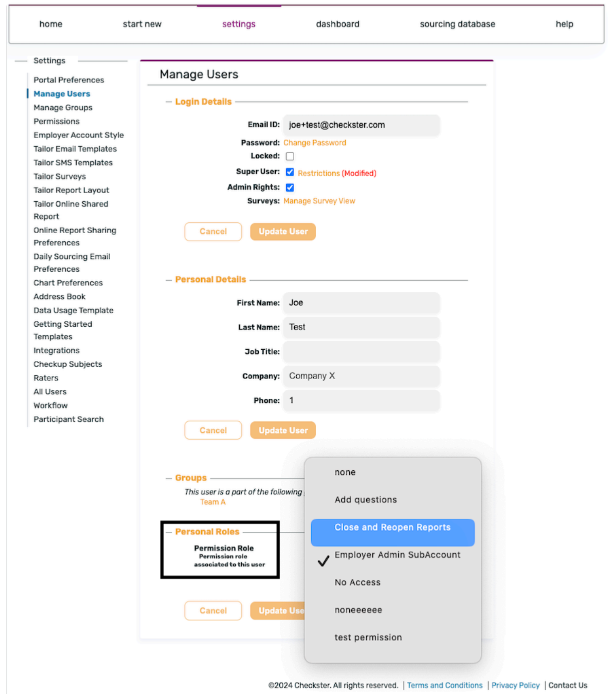


2. Once you click on “Add Role“, it will open a new window. Give the role a name and in the Employer Permission section, for the permission “Checkup.ForceCloseandOpen“ mission, assign “Perform any function“ and save the role.

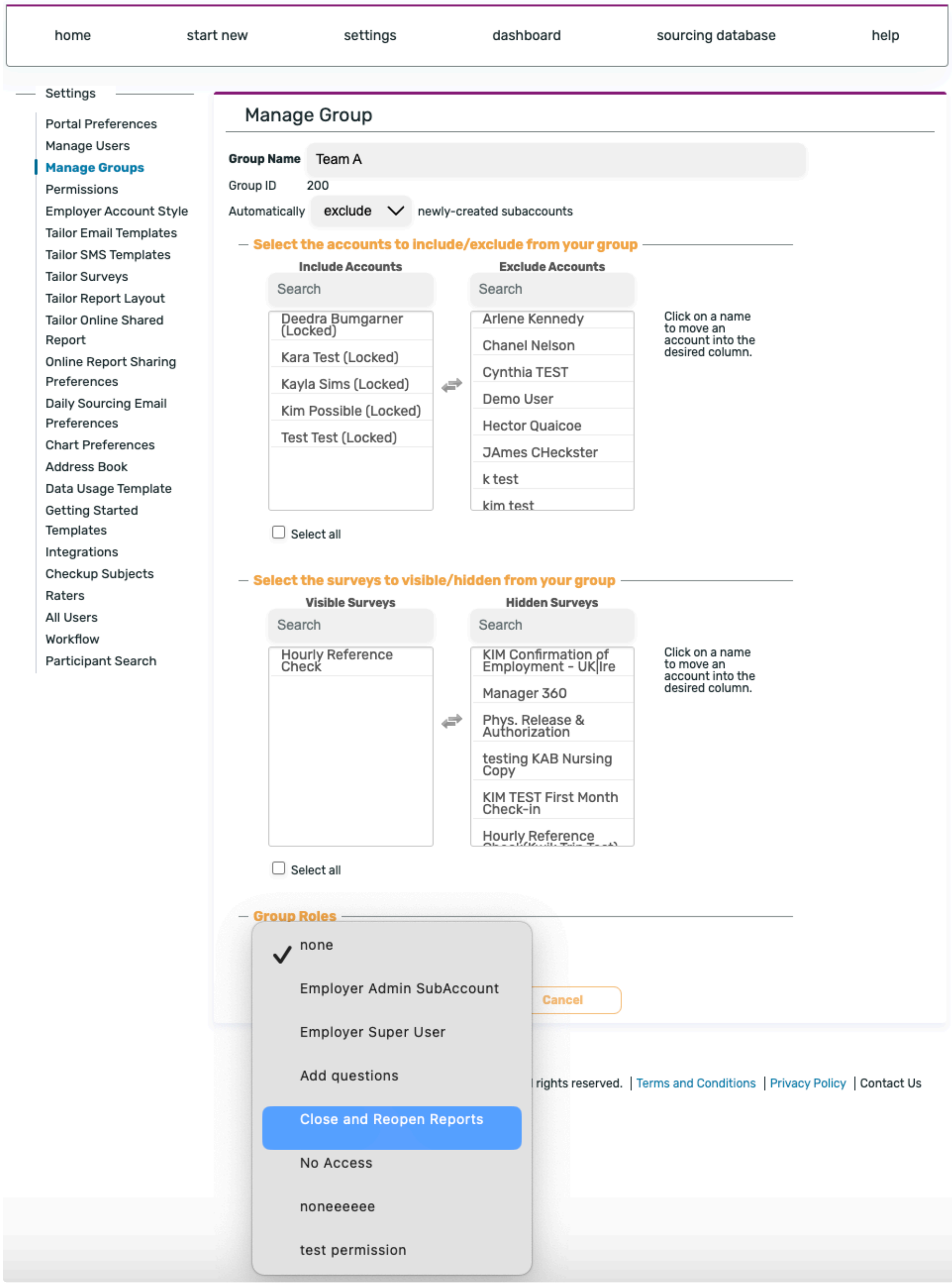


3. Now add this new role as a permission to the user. This can be done in few ways:

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.



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.

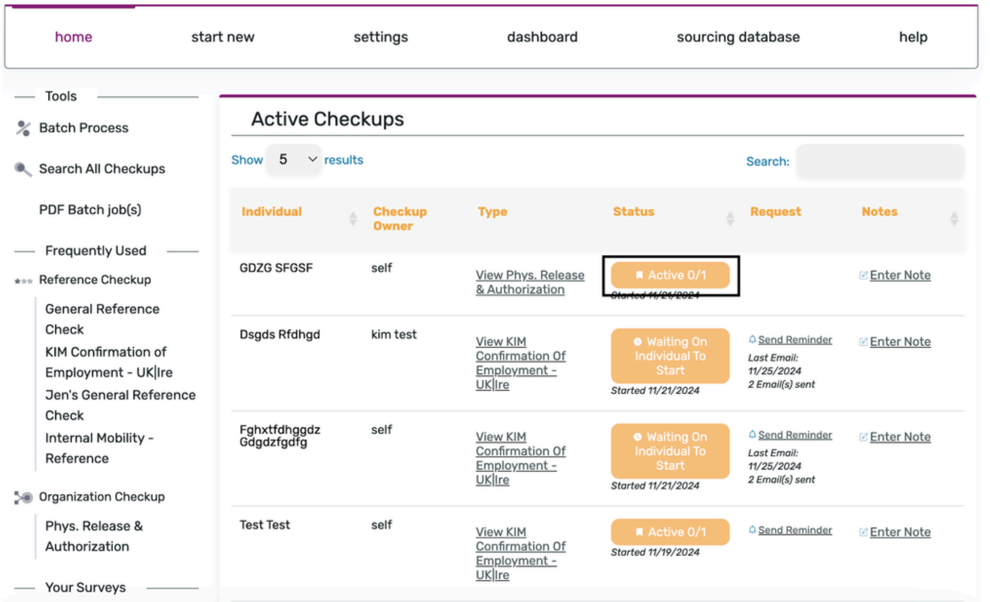


4. User(s) should now be able to close a checkup early or reopen a check report.

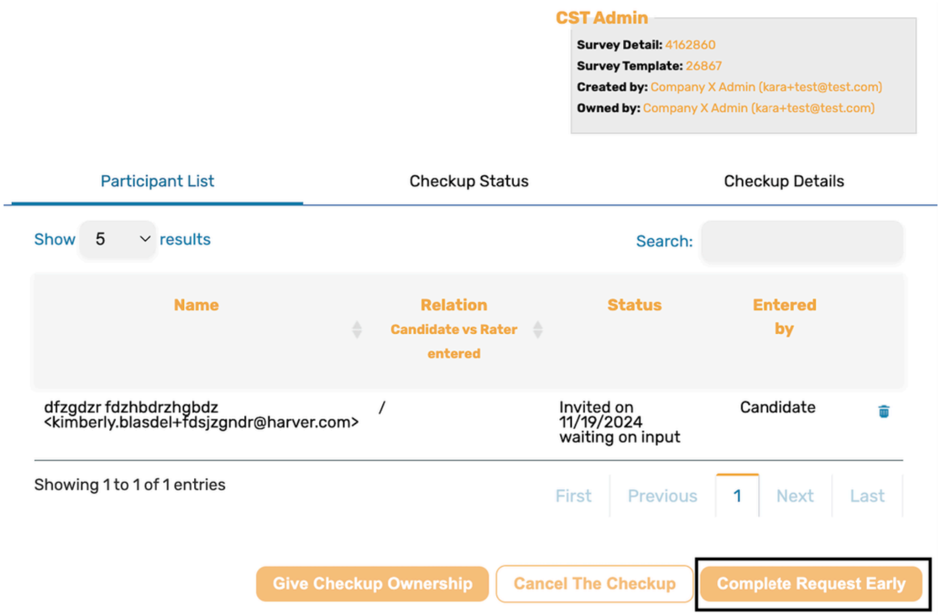
How to Close a Checkup Early?

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

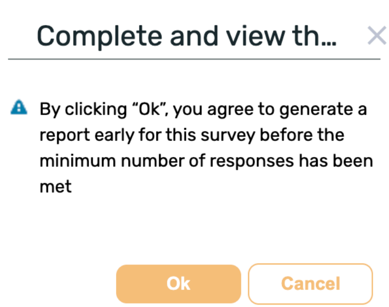
1. On the Employer home page, click on the status of the candidate you want to close the checkup early.



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



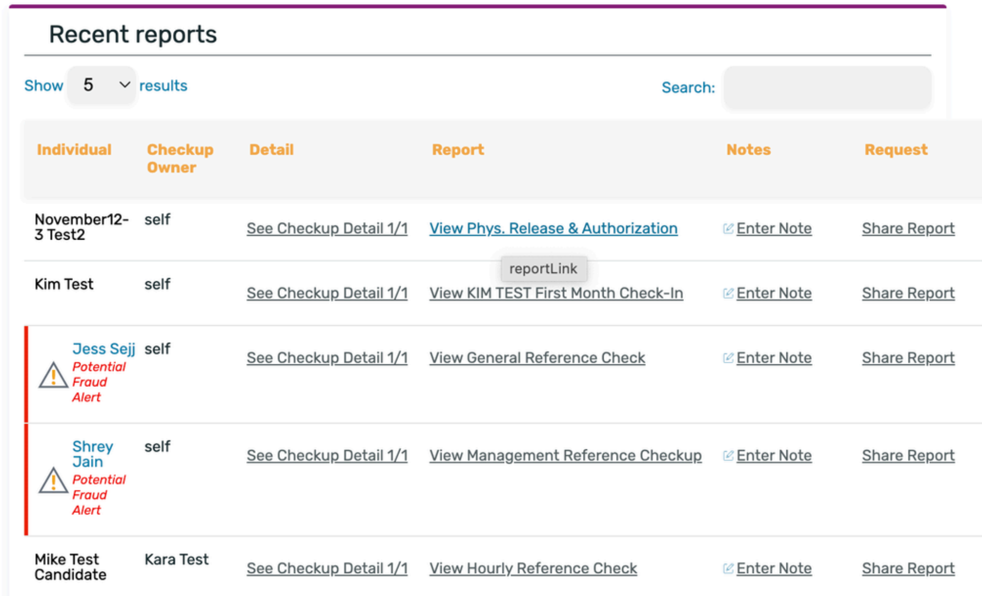
3. Click “OK” on the confirmation window. This will now close the checkup early. You can now find the candidates report in the “Recent Reports“ section in the Home page.



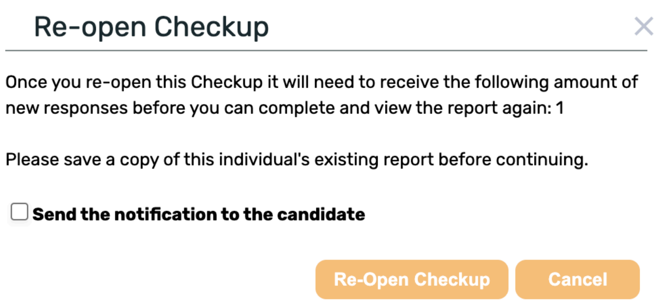
How to Reopen a report?

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.



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



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.