balance TRAK

Specifications Overview

What is BalanceTRAK?

For recruiters, Human Resource personnel, and hiring managers – tasked with attracting, screening, and hiring the right candidates for job openings – BalanceTRAK software provides recruiting-to-hiring support –

Dashboard

Design a dashboard, with notifications, saved views, and key metrics at your fingertips.

Manage Requisitions

Build job postings, with step-by-step tools:

- Save time with reusable Requisition templates
- Associate job descriptions with job titles
- Design and populate a branded Career page
- Post to popular job boards and social media
- Initiate or participate in an approval process
- Schedule interviews
- Set keywords to hone in on the right candidates

Review Job Seekers

- Search for candidates; view by keyword match percentage
- Review submitted resumés and documents
- Communicate with Job Seekers by email, text
- Set up Outlook Calendar events/interviews, and send Job Seeker information to colleagues
- Submit candidates for third-party background check, and hires for onboarding
- Assign status to applicants
- Review openings a Job Seeker has applied to

Reports

- Customize and output reports on Requisition and applicant tracking statistics
- Export Requisition and Job Seeker data

Job Seeker Experience

Integrated with your organization's Website, a Career page will attract and assist Job Seekers:

- Mobile-optimized job application, including an optional integration with *Indeed Apply*
- Search/sort postings, subscribe (in areas of interest), and send posting to friends

Implementation by Berkshire

Berkshire will implement settings to your organization's workflow, and for Federal contractors, install an applicant tracking system to support AA/EEO/VETS requirements:

- On-line prescreeners, applications, self-ID forms, assessments, and scoring schemes
- Unique Requisition approval processes
- Integrations with job boards and other vendors
- Notification preferences and email templates

On-line Access

- Compatible with Chrome, Firefox, Edge, and Internet Explorer
- Collaborate with an unlimited number of users from any location, at any time
- Product Support
- In-line Help documentation, video tutorials, and *Training Guide*
- Technical support by telephone and email, as long as a client account is maintained

Security

- 256-bit https on-line platform via Transport Layer Security (requires a current browser)
- Data are encrypted in transit.
- Password requirements include minimum length, complexity, version control, and expiration.
- Access to tasks and information is controlled by system roles and permissions
- 24/7-monitored data center with physical and network security is SSAE-16-certified and meets the PCI Data Security Standard

Software Tools

Module	Tools
Header, including Account Settings	**Update account information:** • Manage security (password, security questions and answers) • Customize settings for receiving notifications on Job Seeker/Requisition activity, time zone, and number of records per page (pages where applicable) View up to 10 last visited pages Interact with the Notifications Center for recent emails, texts, and system alerts (up to 20) Access on-line Help or submit a support request to Berkshire Switch to other balanceWORKS software
Home Page **All screens:** *Collapsible/expandable side navigation menu to access task areas*	**Personalize the Dashboard,** selecting from the following tile types: • Notifications (e.g., Requisitions requiring approval) • Saved Search and Quick Search • Counters (e.g., Job Seekers by Source, Requisitions Closing Soon) • Graphs (e.g., Job Seeker Location, Time to Fill, Percent Drop-off) • Lists (e.g., Calendar, “To Do”, New Job Seekers, Longest Open Requisitions)
Requisitions (Job Postings) *Take advantage of the dual List / Detail view, which keeps information handy* **List Features:** *Search, sort, filter & access job postings* *By requisition, quickly see status category and number of Job Seekers* *View alerts to ensure openings are posted & accepting applications* *Customize and save advanced searches* *Add a new Requisition (or enter a draft) from the header*	**Add a Requisition** to the system, using step-by-step navigational tools: • Generate numbering for each job opening • Enter required information for each job posting • Set start/end dates, including automatic internal/external posting sequence • Select an existing template, or copy one as the starting point for another • Develop/import the job description (or use the job title’s default description) • Associate forms with the Requisition, based on internal/external pathways • Configure an approval process, using drag-and-drop or advanced designer • Post job opening to Career page, social media, and on-line job boards (with third-party contracts) • (Optional) Set Job Seeker limit to trigger job posting to close (e.g., 50 applicants) **Facilitate the Requisition approval process:** • Initiate the approval process (and automatically move Requisition to “open”) ▪ Resubmit Requisition for approval, as necessary • Participate as an approver – via interactive email notifications, Dashboard, or Detail ▪ Comment on approval/disapproval **Interact with Detail tabs** to support HR processes: • Post Requisition internally or externally and to accept applicants • Assign category (e.g., pending, open), initiating “intuitive” tools, based on category • Update Requisition information; click a link to view current Career page • View Job Seeker breakdown, with one-click access to Job Seekers who applied • Add a new form, or edit an existing one; upload additional documents • Participate in the interview; store questions and document applicant responses • Track costs by job board; view Requisition history; and record/share notes

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Software Tools

Module	Tools

Job Seekers

Take advantage of the dual List / Detail view, which keeps information handy

List Features:

Manage, search, sort & access records

Filter Job Seekers by Requisition, Requisition status category, stage & disposition

Organize by flag, "new," keyword match score, stage/disposition & more

Customize and save advanced searches

Arrange the window in grid view for focused data work

Search resumés by keyword(s)

View pass/fail assessment results

Use Detail header tools to readily:

- Assign Job Seeker stage and disposition
- Flag a Job Seeker
- View internal/external candidate designation

Click through the Detail's tabs for tools to:

- Update a Job Seeker profile (e.g., password, subscriptions, eligibility for hire)
- View openings the Job Seeker has applied to
- Communicate with the Job Seeker by email, using a template or an original note
- Message the Job Seeker by text, for such alerts as a change in interview time
- Schedule an interview and invite attendees
- Access cover letter, resumé (with keyword matches), or other document
- Add a supplementary document to the Job Seeker's record
- Track system activities in, or add a note to, the Job Seeker record
- Arrange the background check (with external contract)
  - Begin by releasing the Background Check form to the Job Seeker
  - Review status of both form completion and the background investigation
- Send an Offer letter to the preferred candidate
- Submit the Job Seeker for onboarding (with external contract)

Perform Job Seeker-related actions:

- Send bulk emails to Job Seekers (using original text or an existing template)
- Forward Job Seeker information to colleagues
- Transmit a response letter to multiple Job Seekers
- Send a Self-Identification form to the Job Seeker for completion
- Invite a Job Seeker to apply
- Copy Job Seeker to another Requisition (or delete a Job Seeker)
- Develop and send an Offer letter to the proposed hire

Reports

Report Features:

Output to common file formats (PDF, Excel, Word, Rich Text)

Organize, filter & sort results to customize reporting content

Select from an array of built-in reports:

Executive Summaries	**Requisitions**	**EEO**
Job Seekers	Open Requisitions	Applicant Detail
Requisitions	Closed Requisitions	Applicant Summary
Open Requisitions	Requisition Detail	EEO Counts
Closed Requisitions	Drop Off Rates	Job Seeker Zip Code Analysis
Referral Source	**Job Seekers**	**History** (Administrator)
Referral Source Summary	Job Seekers by Requisition	Requisition History
Individuals with Disabilities	Hires	Job Seeker History
Veterans		User History
Applicant Status		Search History

Reports / Export Data

Export Requisition or Job Seeker data to Excel:

- Select a predefined export (e.g., Hires, AAP)
- Organize export by location (if applicable), date, Requisition status, and other fields
- Additionally customize the export of Job Seeker data, using filters on fields

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Administrative Settings

Module	Tools
Settings *Designated client-side Administrator only*	**Develop or edit Job Posting Web page,** using themes: • Includes branded content; a job openings table; links for the Job Seeker to log in/ complete the application; media options; social media links; and EEO language **Update existing libraries** in support of organizational workflow: • Reference tables (e.g., create new answers for a form question; import/save job descriptions by job title; edit menu of position types) • Questions, form templates, and scoring schemes • Requisition approval processes; email templates; and notifications • Default Home page Dashboard **Set default user account settings** for email notifications and time zone **Manage system settings for** Job Seeker ineligibility, location access values, requiring templates, login instructions, EEO statement, and kiosk mode **Manage data archiving,** including timing and export to conform with record-retention protocols or regulatory requirements
System Tools *Designated client-side Administrator only*	***Administer –*** **User Management,** including up to four levels of location permissions; view User report **Profile Management** to control user access to perform functions and view/edit data **Client-wide settings** (e.g., email delivery, allow Job Seeker information to be sent)
Personalized Implementation	
Software Environment *Implemented by Berkshire*	***Berkshire will build initial settings and libraries —*** Branded Career page(s): • Link Career page(s) to your corporate Website(s) • Customize layout or components (for additional fee) Job Seeker settings: • Determine when Job Seekers become visible to users • Define Applicant stage progression • Create separate forms for internal and external applicants Requisition settings: • Order Requisition fields; define Requisition progression; and define how the system will close Requisitions and assign Job Seeker status, when closed • Link with America's Job Exchange, Careerbuilder, Indeed, Monster, us.jobs, Google • Integrate with particular background screening and onboarding providers • Build Reference tables (e.g., applicant disposition codes) • Set up questions for inclusion in forms and form templates • Develop Requisition templates • Set up email templates for communications with Job Seekers and colleagues • Build Requisition approval processes

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