

## 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

Module	Tools
<p><b>Header, including Account Settings</b></p>	<p>Update account information:</p> <ul style="list-style-type: none"> <li>• Manage security (password, security questions and answers)</li> <li>• Customize settings for receiving notifications on Job Seeker/Requisition activity, time zone, and number of records per page (pages where applicable)</li> </ul> <p>View up to 10 last visited pages</p> <p>Interact with the Notifications Center for recent emails, texts, and system alerts (up to 20)</p> <p>Access on-line Help or submit a support request to Berkshire</p> <p>Switch to other BALANCEworks software</p>
<p><b>Home Page</b></p> <p><i>All pages:</i> Collapsible/expandable side navigation menu to access task areas</p>	<p><b>Personalize the Dashboard</b>, selecting from the following tile types:</p> <ul style="list-style-type: none"> <li>• Notifications (e.g., Requisitions requiring approval)</li> <li>• Saved Search and Quick Search</li> <li>• Counters (e.g., Job Seekers by Source, Requisitions Closing Soon)</li> <li>• Graphs (e.g., Job Seeker Location, Time to Fill, Percent Drop-off)</li> <li>• Lists (e.g., Calendar, “To Do”, New Job Seekers, Longest Open Requisitions)</li> </ul>
<p><b>Requisitions (Job Postings)</b></p> <p><i>Take advantage of the List / Detail view, which keeps information handy</i></p> <p><b>List Features:</b></p> <ul style="list-style-type: none"> <li><i>Search, sort, filter &amp; access job postings</i></li> <li><i>By requisition, quickly see status category and number of Job Seekers</i></li> <li><i>View alerts to ensure openings are posted &amp; accepting applications</i></li> <li><i>Customize and save advanced searches</i></li> <li><i>Add a new Requisition (or enter a draft) from the header</i></li> </ul>	<p><b>Add a Requisition</b> to the system, using step-by-step navigational tools:</p> <ul style="list-style-type: none"> <li>• Generate numbering for each job opening</li> <li>• Enter required information for each job posting</li> <li>• Set start/end dates, including automatic internal/external posting sequence</li> <li>• Select an existing template, or copy one as the starting point for another</li> <li>• Develop/import the job description (or use the job title’s default description)</li> <li>• Associate forms with the Requisition, based on internal/external pathways</li> <li>• Configure an approval process, using drag-and-drop or advanced designer</li> <li>• Post job opening to Career page, social media, and on-line job boards (with third-party contracts)</li> <li>• (Optional) Set Job Seeker limit to trigger job posting to close (e.g., 50 applicants)</li> </ul> <p><b>Facilitate the Requisition approval process:</b></p> <ul style="list-style-type: none"> <li>• Initiate the approval process (and automatically move Requisition to “open”) <ul style="list-style-type: none"> <li>▪ Resubmit Requisition for approval, as necessary</li> </ul> </li> <li>• Participate as an approver – via interactive email notifications, Dashboard, or Detail <ul style="list-style-type: none"> <li>▪ Comment on approval/disapproval</li> </ul> </li> </ul> <p><b>Interact with Detail tabs</b> to support HR processes:</p> <ul style="list-style-type: none"> <li>• Post Requisition internally or externally and to accept applicants</li> <li>• Assign category (e.g., pending, open), initiating “intuitive” tools, based on category</li> <li>• Update Requisition information; click a link to view current Career page</li> <li>• View Job Seeker breakdown, with one-click access to Job Seekers who applied</li> <li>• Add a new form, or edit an existing one; upload additional documents</li> <li>• Participate in the interview; store questions and document applicant responses</li> <li>• Track costs by job board; view Requisition history; and record/share notes</li> </ul>

Module	Tools			
<p><b>Job Seekers</b></p> <p><i>Take advantage of the List / Detail view, which keeps information handy</i></p> <p><b>List Features:</b></p> <ul style="list-style-type: none"> <li>Manage, search, sort &amp; access records</li> <li>Filter Job Seekers by Requisition, Requisition status category, disposition &amp; Job Seeker stage</li> <li>Organize list by flag, “new,” keyword match score &amp; more</li> <li>Search resumés by keyword(s)</li> <li>Customize and save advanced searches</li> <li>View pass/fail assessment results</li> </ul>	<p><b>Use Detail header tools to:</b></p> <ul style="list-style-type: none"> <li>Assign Job Seeker stage and disposition</li> <li>Flag a Job Seeker</li> <li>View internal/external candidate designation</li> </ul> <p><b>Click through the Detail’s tabs for tools to:</b></p> <ul style="list-style-type: none"> <li>Update Job Seeker profile (e.g., password, subscriptions, eligibility for hire)</li> <li>View openings the Job Seeker has applied to</li> <li>Communicate with the Job Seeker by email, using a template or an original note</li> <li>Message the Job Seeker by text, for such alerts as a change in interview time</li> <li>Schedule an interview and invite attendees</li> <li>Access the Job Seeker’s cover letter, resumé, or other document <ul style="list-style-type: none"> <li>View keyword matches in the resumé</li> </ul> </li> <li>Add a supplementary document to the Job Seeker’s record</li> <li>Track system activities in, or add a note to, the Job Seeker record</li> <li>Submit the Job Seeker for background check or onboarding (with external contract) <ul style="list-style-type: none"> <li>Review current status of background check or onboarding</li> </ul> </li> </ul> <p><b>Perform Job Seeker-related actions:</b></p> <ul style="list-style-type: none"> <li>Send bulk emails to Job Seekers (using original text or an existing template)</li> <li>Forward Job Seeker information to colleagues</li> <li>Send a form to the Job Seeker for completion</li> <li>Copy Job Seeker to another Requisition (or delete a Job Seeker)</li> <li>Invite a Job Seeker to apply</li> </ul>			
<p><b>Reports</b></p> <p><b>Report Features:</b></p> <ul style="list-style-type: none"> <li>Output to common file formats (PDF, Excel, Word, Rich Text)</li> <li>Organize, filter &amp; sort results to customize reporting content</li> </ul>	<p><b>Select from an array of built-in reports:</b></p> <table border="0"> <tr> <td> <p><b>Executive Summaries</b></p> <ul style="list-style-type: none"> <li>Job Seekers</li> <li>Requisitions</li> <li>Open Requisitions</li> <li>Closed Requisitions</li> </ul> <p><b>Referral Source</b></p> <ul style="list-style-type: none"> <li>Referral Source Summary</li> <li>Individuals with Disabilities</li> <li>Veterans</li> <li>Applicant Status</li> </ul> </td> <td> <p><b>Requisitions</b></p> <ul style="list-style-type: none"> <li>Open Requisitions</li> <li>Closed Requisitions</li> <li>Requisition Detail</li> <li>Drop Off Rates</li> </ul> <p><b>Job Seekers</b></p> <ul style="list-style-type: none"> <li>Job Seekers by Requisition</li> <li>Hires</li> </ul> </td> <td> <p><b>EEO</b></p> <ul style="list-style-type: none"> <li>Applicant Detail</li> <li>Applicant Summary</li> <li>EEO Counts</li> <li>Job Seeker Zip Code Analysis</li> </ul> <p><b>History (Administrator)</b></p> <ul style="list-style-type: none"> <li>Requisition History</li> <li>Job Seeker History</li> <li>User History</li> <li>Search History</li> </ul> </td> </tr> </table>	<p><b>Executive Summaries</b></p> <ul style="list-style-type: none"> <li>Job Seekers</li> <li>Requisitions</li> <li>Open Requisitions</li> <li>Closed Requisitions</li> </ul> <p><b>Referral Source</b></p> <ul style="list-style-type: none"> <li>Referral Source Summary</li> <li>Individuals with Disabilities</li> <li>Veterans</li> <li>Applicant Status</li> </ul>	<p><b>Requisitions</b></p> <ul style="list-style-type: none"> <li>Open Requisitions</li> <li>Closed Requisitions</li> <li>Requisition Detail</li> <li>Drop Off Rates</li> </ul> <p><b>Job Seekers</b></p> <ul style="list-style-type: none"> <li>Job Seekers by Requisition</li> <li>Hires</li> </ul>	<p><b>EEO</b></p> <ul style="list-style-type: none"> <li>Applicant Detail</li> <li>Applicant Summary</li> <li>EEO Counts</li> <li>Job Seeker Zip Code Analysis</li> </ul> <p><b>History (Administrator)</b></p> <ul style="list-style-type: none"> <li>Requisition History</li> <li>Job Seeker History</li> <li>User History</li> <li>Search History</li> </ul>
<p><b>Executive Summaries</b></p> <ul style="list-style-type: none"> <li>Job Seekers</li> <li>Requisitions</li> <li>Open Requisitions</li> <li>Closed Requisitions</li> </ul> <p><b>Referral Source</b></p> <ul style="list-style-type: none"> <li>Referral Source Summary</li> <li>Individuals with Disabilities</li> <li>Veterans</li> <li>Applicant Status</li> </ul>	<p><b>Requisitions</b></p> <ul style="list-style-type: none"> <li>Open Requisitions</li> <li>Closed Requisitions</li> <li>Requisition Detail</li> <li>Drop Off Rates</li> </ul> <p><b>Job Seekers</b></p> <ul style="list-style-type: none"> <li>Job Seekers by Requisition</li> <li>Hires</li> </ul>	<p><b>EEO</b></p> <ul style="list-style-type: none"> <li>Applicant Detail</li> <li>Applicant Summary</li> <li>EEO Counts</li> <li>Job Seeker Zip Code Analysis</li> </ul> <p><b>History (Administrator)</b></p> <ul style="list-style-type: none"> <li>Requisition History</li> <li>Job Seeker History</li> <li>User History</li> <li>Search History</li> </ul>		
<p><b>Reports / Export Data</b></p>	<p><b>Export Requisition or Job Seeker data to Excel:</b></p> <ul style="list-style-type: none"> <li>Select a predefined export (e.g., Hires, AAP)</li> <li>Organize export by location (if applicable), date, and Requisition status category</li> <li>Additionally customize the export of Job Seeker data, using filters for: Requisition, stage, disposition, form type, questions, and other Job Seeker fields</li> </ul>			

Module	Tools
<p><b>Settings</b> <i>Designated client-side Administrator only</i></p>	<p><b>Develop or edit Career Web page</b>, using themes:</p> <ul style="list-style-type: none"> <li>• Includes branded content; a job posting table; links for the Job Seeker to log in/complete the application; media; social media links, and EEO language</li> </ul> <p><b>Update existing libraries</b> in support of organizational workflow:</p> <ul style="list-style-type: none"> <li>• Reference tables (e.g., create new answers for a form question; import/save job descriptions by job title; edit menu of position types)</li> <li>• Questions, form templates, and scoring schemes</li> <li>• Requisition approval processes; email templates; and notifications</li> <li>• Default Home page Dashboard</li> </ul> <p><b>Set default user account settings</b> for email notifications and time zone</p> <p><b>Manage system settings</b> for Job Seeker ineligibility, location access values, requiring templates, login instructions, EEO statement, and kiosk mode</p> <p><b>Manage data archiving</b>, including timing and export to conform with record-retention protocols or regulatory requirements</p>
<p><b>System Tools</b> <i>Designated client-side Administrator only</i></p>	<p><b>Administer –</b></p> <p><b>User Management</b>, including up to four levels of location permissions; view User report</p> <p><b>Profile Management</b> to control user access to perform functions and view/edit data</p> <p><b>Client-wide settings</b> (e.g., email delivery, allow Job Seeker information to be sent)</p>
<p><b>Personalized Implementation</b></p>	
<p><b>Software Environment</b> <i>Implemented by Berkshire</i></p>	<p><b><u>Berkshire will build initial settings and libraries –</u></b></p> <p>Branded Career page(s):</p> <ul style="list-style-type: none"> <li>• Link Career page(s) to your corporate Website(s)</li> <li>• Customize layout or components (for additional fee)</li> </ul> <p>Job Seeker settings:</p> <ul style="list-style-type: none"> <li>• Determine when Job Seekers become visible to users</li> <li>• Define Applicant stage progression</li> <li>• Create separate forms for internal and external applicants</li> </ul> <p>Requisition settings:</p> <ul style="list-style-type: none"> <li>• Order Requisition fields; define Requisition progression; and define how the system will close Requisitions and assign Job Seeker status, when closed</li> <li>• Link with America’s Job Exchange, Careerbuilder, Indeed, Monster, us.jobs, Google</li> <li>• Integrate with particular background screening and onboarding providers</li> <li>• Build Reference tables (e.g., applicant disposition codes)</li> <li>• Set up questions for inclusion in forms and form templates</li> <li>• Develop Requisition templates</li> <li>• Set up email templates for communications with Job Seekers and colleagues</li> <li>• Build Requisition approval processes</li> </ul>