What is BALANCE*trak*?

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

Home page Dashboard

Key notifications, saved views, and graphical objects (Requisition status and recent Job Seekers) are at your fingertips.

Manage Requisitions

Build job postings, with intuitive tools to:

- Develop, save, and reuse job descriptions
- Initiate or participate in an approval process
- Post to branded Career page and job boards
- Communicate with colleagues
- View Job Seekers who applied, with quick links to Job Seeker tools

Review Job Seekers

- Search for candidates; review resumés
- Review and communicate with Job Seekers
- Set up Calendar events, and send Job Seeker information to others
- Submit candidates for third-party background check, and hires for onboarding
- Assign status to applicants
- Review openings a Job Seeker has applied to
- Submit or approve a candidate for hire

Reports

Customize and output reports on key Requisition and applicant tracking statistics.

Job Seeker Experience

Integrated with your organization's Website, a Career page will display custom content, job postings, and tools to assist Job Seekers.

- Mobile-optimized job application, including an available integration with *Indeed Apply*

Custom Implementation by Berkshire

Berkshire's Implementation team will align 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/hiring approval processes
- Integrations with job boards and other vendors
- Notification preferences and email templates

On-line Access

- Compatible with Internet Explorer/Edge, Firefox, and Chrome. (For up-to-date information on browser compatibility, see: www.berkshireassociates.com/ browsersupport.aspx)
- 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 is included as long as a client account is maintained.

Security

- 256-bit https on-line platform via Transport Layer Security, data are encrypted in transit (For best safety, use a current browser.)
- 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
Account Settings	Customize defaults for: • Task-area home-page views • Receipt of notifications on Job Seeker/Requisition activity • Time zone
Home Page ***All pages:*** *Side navigation menu to access task areas*	**Dashboard** features include: • Pie Chart (Current Requisitions) • Graph (Recent Job Seekers) • Calendar of upcoming events (including "send to" Outlook) • Notifications (Requisitions/Job Seekers requiring approval) • Saved Views list (most-used searches and filters)
Requisitions (Job Postings) ***Special List Features:*** *Search, sort, filter, and access job postings* *View Requisitions by status, such as accepting applications* *Customize and save views for future use, based on sort and filter settings*	Add Requisitions to the system: • Auto-generate Requisition numbering or enter for each job opening • Enter or select required information for each job posting, and set start/end dates Requisition information menu and toolbar: • Update Requisition information • Send emails to colleagues about Requisition matters • Assign status, which initiates "intuitive" tools at each stage until Requisition is closed • Copy a Requisition as the starting point for another one • View number of applicants; jump to Job Seekers list for the Requisition Build and use the Requisition: • Develop or import the job description (or use the job title's default description) • Post job opening to the branded Career page and on-line job boards (with third-party contracts), and track costs by posting • Start or participate in the Requisition approval process, using automatic email notifications, tools, and a comment field; resubmit for approval, as necessary. • Upload associated documents • Keep track of Requisition Calendar events, such as interviews • View Requisition history, and keep a record of (and share) related notes • Export Requisition data Review Job Seekers who have applied: • See resumés, application responses, and test scores • Review current status, as well as status of background check and hiring approval, as applicable • Access the full Job Seeker record

Module	Tools

Job Seekers

Special List Features:

Manage, search, sort, filter, and access candidate records

View Job Seekers by requisition and category, such as recent or not reviewed

Search resumés

Customize and save views for future use, based on sort and filter settings

Toolbar buttons are available to:

- Open Job Seeker documents and forms
- Assign applicant status
- Send Bulk emails (using original text or existing templates) to Job Seekers
- Forward Job Seeker information and documents to colleagues
- Flag and review a group of Job Seekers at the same time
- Import a resumé to add or update Job Seeker data

Use the Review Job Seeker detail:

- Update Job Seeker information, including password security functions
- View openings the Job Seeker has applied to, along with submitted forms (and test scores, if applicable)
- Access the most recent cover letter or resumé
- Add a supplementary document to the Job Seeker's record
- Track system activities in, or add a note to, the Job Seeker record

Perform Job Seeker-related actions:

- Send a form to the Job Seeker for completion
- Copy the Job Seeker to another Requisition
- Add a calendar event, and send Job Seeker information to colleagues
- Submit Job Seeker for background check (with external contract)
- Initiate or participate in the hiring approval process, with automatic email notifications and tools; view approval status and history
- Submit the hired applicant for third-party onboarding (with external contract)
- Export Job Seeker data (including to BALANCE*aap*)

Reports

Special Features:

Determine export settings for report results

Organize, filter, and sort results to customize reporting content

Select from a list of built-in reports:

Executive Summaries
Job Seekers
Requisitions
Open Requisitions
Closed Requisitions

Referral Source
Referral Source Summary
Individuals with
    Disabilities
Veterans
Applicant Status

Requisitions
Open Requisitions
Closed Requisitions
Requisition Detail
Drop Off Rates

Job Seekers
Job Seekers by
Requisition
Hires

EEO
Applicant Detail
Applicant Summary
EEO Counts
Job Seeker Zip Code
    Analysis

History (Administrator)
Requisition History
Job Seeker History
User History
Search History

Module	Tools
Administrative Settings *Designated client-side Administrator only*	Update and add to existing libraries (see below) in support of workflow changes: • Reference tables (e.g., create new answers for a form question; import/save job descriptions by job title; create menu of position types for Requisitions) • Questions, form templates (prescreener, application, self-id, background check, assessment), and scoring schemes • Approval process for Requisitions and candidate hiring • Email templates and notifications
Custom Implementation	**Berkshire will build initial settings and libraries —**
Client Settings *Customized by Berkshire for client workflow*	User list, with system permissions: • Functional Profiles to control access to task areas by role (e.g., Recruiter, HR Administrator, Hiring Manager) • Data Profiles to control data access levels (e.g., Read-write, read only) • Access to Requisitions by business unit Default Account settings *(which can be changed by the individual user later)*: • Select task-area home-page views • Set how and when to receive email notifications on Job Seeker/Requisition activity • Select time zone Branded Career page on the Web: • Includes custom content; a job postings table, with necessary links for the Job Seeker to log in and complete the job application; plus EEO language • Will allow Job Seekers to search, sort, subscribe to job postings in areas of interest, and send job postings to friends Job Seeker settings: • Determine when Job Seekers become visible to users • Define Applicant Stage and Applicant Status • Option to create separate application paths for internal and external applicants Requisition settings: • Order Requisition fields; define Requisition statuses; and define how the system will close Requisitions and assign Job Seeker status, when closed • Integrate with America's Job Exchange, Careerbuilder, Indeed, Monster, us.jobs • Integrate with particular background screening and onboarding providers • Option to limit the number of Job Seekers Reference tables (Determine specific menu values; e.g., applicant disposition codes) Templates: • Set up questions, forms, assessments, and scoring schemes for screening Job Seekers (e.g., exempt, non-exempt) • Set up email templates for communications with Job Seekers and colleagues Approval processes for Requisitions and hiring