



Effective date: 8/17/2020

HireResources Candidate Ownership Rules

Important: Any candidates in the ATS system (Zoho) without SAVED NOTES are open to any other member to engage and take ownership. Make sure you add notes when adding candidates to Zoho! The different ways you can claim ownership of candidates:

- Uploading the Resume into Zoho:
 - **We allow resumes to be uploaded from: LinkedIn, Indeed, Zip, etc. in PDF, or Microsoft Word files if you have a valid email address.**
- Adding a Note into Zoho.
 - 4-day hold: Your note can be short. Examples: Reached out to candidate waiting for response or left a voice message or scheduled interview for 7/12 at 2pm, etc.
 - Full 90-day ownership: Notes must be somewhat detailed, Example: Details on their situation, why they're looking, interest level in our job, about their strengths, why a good fit or not a match etc.
- Only one Member can own a candidate at one time.
- Splits are allowed but the Member with the ownership will need to approve any splits when submitting their invoice to HireResources.

We have three ownership types:

1. **Candidate ownership:** 3-month ownership if you talk with the candidate and save a detailed note of your interview with the candidate.
2. **Candidate Hold:** Four (4) business day ownership hold (banking Holidays do extend the hold period) You must have, at a minimum, an email address to enter a candidate into Zoho. Definition: To secure a candidate hold, it's required to upload a resume or a profile from LinkedIn (PDF), Zip Recruiter/Indeed, etc., enter it into Zoho as a new candidate and add a simple note of your actions, **this is required to be entered**. If you fail to enter a note, you forfeit your candidate hold. You cannot extend a candidate hold.
3. **Candidate ownership extension;** extend your ownership for another 30 days from your last note entry. This can be continual to keep your ownership. You will need to add a note that you have made contact with the candidate in Zoho.

Explanation of ownership types:

When adding a new candidate into Zoho:

New Candidate, Ownership:

- You upload a new resume that did **not** exist in Zoho prior.
 - When adding a new candidate into Zoho you must check for any duplicates. Zoho does not allow duplicate candidates into the system with the **same** email. If you add a duplicate candidate into Zoho that conflicts with another Member, HireResources Management will review the date stamps to determine ownership.
- You entered detailed dialog notes of your interview with the candidate.

New Candidate “hold”

- You upload a new resume that did not exist in Zoho prior.
- You leave a voice message for the candidate or send an email asking for a time to schedule a call, this **MUST** be logged in notes to hold the candidate ownership.
Failure to add any note will forfeit your ownership hold rights.

Extensions

- You can extend ownership for one month after your last logged activity entry.
 - Acceptable entries include:
 - Phone conversations with some notes
 - Emails entries with some notes
 - In person meetings with some notes

If/when discrepancies do occur Sr. Management at HireResources will decide on the ownership and it could include splitting up ownership to multiple Members.

When claiming ownership of an existing candidate in Zoho:

- When ownership has elapsed Member can claim ownership by:
 - Member can Log a new call with detailed notes.
 - Member can put a “hold” by either leaving a voice message or sending the candidate an email about a job opening and adding intent notes as outlined above in candidate Hold notes. If you do not have a job to discuss with the candidate, you can’t put a hold on the candidate.
 - Member can also upload an updated version of the candidates resume and add notes to the candidates profile to claim ownership. If the candidate is not owned by someone else already.

If you find a candidate that is owned by another Member for a job that they are not submitted to already, we do encourage you to call the Member with ownership and discuss the role you would like to present to the candidate. If it is a match, we strongly encourage and recommend a 50/50 candidate side split.

A candidate split would be to the sole discretion of the Member holding ownership. We encourage Members to split the candidate ownership in these circumstances. At the time of placement, the candidate owner will need to inform HireResources and sign off on this upon sending for invoicing/payment to be made.

If you should have any questions about this policy, please let Sr. Management know. Thank you.