Glossary

Applicant
An applicant is a person who has applied to at least one requisition. Each applicant has a unique applicant ID generated when they begin an application process, are uploaded/referred, etc. Applicants may have a one-to-many relationship with requisitions in that a person can apply to more than one job with the same organization. No matter how many requisitions they apply to, they always have only one applicant ID.
The same applicant can, however, have multiple candidacies for different requisitions they apply to. For example, if a person applies to three requisitions with the same organization, that person will have one unique applicant ID and three unique candidate IDs. Certain data, such as race/ethnicity, gender, veteran status, and visa needs, are tracked at the applicant level.

ATS
Applicant Tracking System - This is software for recruiters and employers to track candidates throughout the recruiting and hiring process.

Authorized Users
Users that have been granted access to view requisitions by Recruiters via the Advanced Options section of a requisition.

Auto Response Template
The email written here will be sent to candidates who have applied via email or have been added to the system through an instant upload. You can use the macros above the email text to populate the candidate's first and last name when the response is sent out.

Bulk Reply Templates
Bulk reply templates are email templates used for communication through the system. You can create an email template for any email you may send frequently when replying to candidates or forwarding candidates to an email address.

Candidate
A candidate is an individual who has applied to a given requisition regardless of how many other requisitions they have applied to within the same organization. A unique candidate ID is created each time a requisition has been applied, meaning candidates always have a one-to-one relationship with requisitions. For example, if a person applies to three requisitions with the same organization, that person will have three unique candidate IDs.

Candidate Custom Field
You can create custom candidate fields appearing in the candidates' tear sheet. You can create two types of candidate custom fields: External fields: You can create questions that appear in the online profile process. These fields can be used to fully customize the online application process, ensuring you receive all the information you need about a candidate. Remember to ask questions through the online profile and/or screening questions.

Candidate Status
Candidates can be either active or inactive. An inactive candidate is a candidate who has been deleted from a requisition. An active candidate is a candidate who has not been deleted. The notion of active or inactive has nothing to do with whether or not someone has been placed in a workflow stage, and most organizations have plenty of active candidates who have never been placed in a workflow stage.

The logic underlying many of the reports analyzing candidate data in the Reporting Center has been built in such a way as only to consider active candidates. A report's description should indicate whether the report includes only active candidates.

Closed-Loop Email
Closed-loop email is a special feature that enables you to correspond with candidates through your regular email services, such as Gmail, Outlook, etc. With this feature, if the first email to a candidate is sent through ClearCompany, you can continue to correspond with that individual through an email service outside of ClearCompany. The correspondence will be tracked in the Candidate Notes section of a candidate's tear sheet. Email-related reports in the Reporting Center should state whether they include correspondence sent through closed-loop email.

Current Workflow Stage
A candidate's current workflow stage is the workflow stage that the candidate is in when a report is accessed.

Disposition
To disposition a candidate is the process of moving a candidate along in the hiring process or removing them from consideration. Dispositioning candidates should be completed in real-time for reporting purposes.

Document Library
Before adding a form to a New Hire Packet, upload it into the Document Library. This page can be found under Setup → Onboarding Setup → Document Library.

Email Upload
The email upload option allows you to submit an applicant's documents through email.

EEO Data
Information collected supporting Equal Employment Opportunity legislation is commonly known as EEO data and can be collected from applicants who apply for a job through ClearCompany. This information may be collected during the application phase using either system standard EEO forms attached to an application or through standard system questions built directly into the application. It is important to note that if you plan to use standard EEO reports available in the Reporting Center, you must use one of these two methods to collect EEO data. If you create your custom application questions asking about EEO data, these will **not** pull into standard reports. You may also collect EEO data as part of your onboarding process after an individual has accepted a position rather than during the application phase.

EEO data may include information about race/ethnicity, gender, veteran status, and disability status. ClearCompany allows you to collect some or all of this data appropriately for your organization. EEO data is tracked on the applicant level, which means that if an applicant has multiple candidacies (i.e., they have applied to more than one position), their most recent responses to EEO questions will be reflected in reports analyzing EEO data.

Grade
Grades may be assigned to candidates automatically upon creating a candidate record (a soft grade) and manually by a user (a hard grade). To ensure that all candidates start on the same foot, all candidates enter the system with a light-colored "soft A." The candidate's hard grade will be whatever grade the system assigns them based on the application's logic. Grades enable you to track the quality of your candidates easily and visually and readily identify the A-players who have applied to your organization.

Historical Workflow Stages
A candidate's historical workflow stages are all of the workflow stages they have ever been in, including the one they are in currently. In addition to the name of the workflow stage, it is also possible to report on the date a candidate was placed into a given workflow stage.

An important thing to note is that even if a candidate is accidentally placed into a workflow stage for a moment, that stage will still be part of their log of historical workflow stages and will impact reporting. If a candidate is put in the same workflow stage multiple times, they will have a date stamp for each time they were put in the workflow stage. For example, if a report is pulling in the names of candidates who were placed into a workflow stage called "Hired" within a specified time frame and a candidate was placed into the "Hired" workflow stage twice within the stipulated time frame, that candidate's name will appear twice in the report.

Similarly, if a report counts the number of candidates placed into a workflow stage called "Hired" within that same time frame, that candidate would be counted twice because they were placed into that workflow stage twice.

My Tasks
This is where you can find all onboarding forms from new hire packets assigned to you that require your approval. Each form will give you the option to either accept or reject.

Referral
A referral is an individual submitted to a requisition by someone already working at the organization in question. The ClearCompany employee referral tool is embedded on an internal career site and enables existing employees to refer people for post-requisitions. A user that has provided the referral will also be visible in the candidate profile; to learn more, see the Candidate Referrer.

ClearCompany's automatic feeds to Indeed, Glassdoor, SimplyHired, and LinkUp, referrals (if you are using our referral tool), external vendors, resume uploads, as well as any custom sources that you set up are tracked.

When viewing source reports, you may notice that some reports have two columns: one entitled "How Applied" and another entitled "Upload Source." "How Applied" refers to generalized types of sources that people may use to apply for jobs, such as "Company Job Board," "Custom Source," "Direct Upload," "Internal Career Site," "Job Board," and "Vendor." "Upload Source" refers to the specific source of an application, such as "Indeed," "Company Job Board," "University Career Fair" (this is an example of a custom source), "Instant/Bulk Upload," etc.

While source reports will track custom sources enabled on a per-requisition basis, standard source reports available in the Reporting Center do not track answers to any application questions that might be asked about a candidate's source. If your application process asks a question designed to collect a candidate's source, such as "How did you hear about opportunities with our organization?" answers to this question will **not** be reflected in a standard source report.

Requisition
A job requisition is a formal request recruiters or hiring managers fill out for their company's HR department to create a new position or to fill a job vacancy. A job requisition goes beyond just the job description and job title. A good job req also includes relevant information such as, hiring manager details.

Requisition Approval Process
When you create a new requisition, are certain people within your organization who must review and approve it before it can go live? If so, this section will be very useful to you! Instead of a traditional paper-based approval process that requires you to chase signatures all over the office, our electronic requisition approval process can accomplish the same goal paper-free! When you list someone as an approver, they will receive an email that gives them all the information they need and allows them to click through and approve or reject a requisition.

Requisition Custom Field
Requisition custom fields will appear on the requisition. When you create a new requisition, these fields will be present. You can choose whether or not to make the field required when creating the requisition.

Screening Questions
Screening questions may be used to learn more about candidates' qualifications quickly and easily. Screening questions are grouped by folders and enabled by requisition; you can choose which questions are asked for each position. Typically, screening questions are grouped by job functions such as administrative, sales, marketing, etc. This allows for targeted information to be collected depending on the nature of the position. If necessary, you can activate more than one group of questions on the requisition.

Search
Keyword Search will only search for candidates with the keyword(s) in their resume or other stored information.

Source
An applicant or candidate's source tells us how that individual applied for a job with your organization. Sources such as your company's job board,
Workflow (Recruiting)

The workflow feature allows you to easily organize all candidates based on their stage in the application process (such as phone screening, offer extended, or hiring). The workflow tab allows you to create, edit, and delete workflow stages for use in the system.

Workflow Stages

Workflow stages are a useful way to manage how far your candidates have progressed in the hiring process for a given requisition. While a candidate can only be in one workflow stage at a time, there is no limit on the number of different workflow stages they may be in throughout their candidacy for a position.