

# Recruiter First Workflows/Pages

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## Recruiter First Workflows/Pages

Recruiter first workflows allow your recruiters to fill out and sign forms before they are sent to be completed by an employee via HRCenter. In these workflows the service rep who sends the workflow/page to the employee within Enterprise or Beyond will receive the document in [their own HRCenter web user account](#). Next, the service rep can interact with any form pages that have been created allowing the service rep to fill out/ signing a document first.

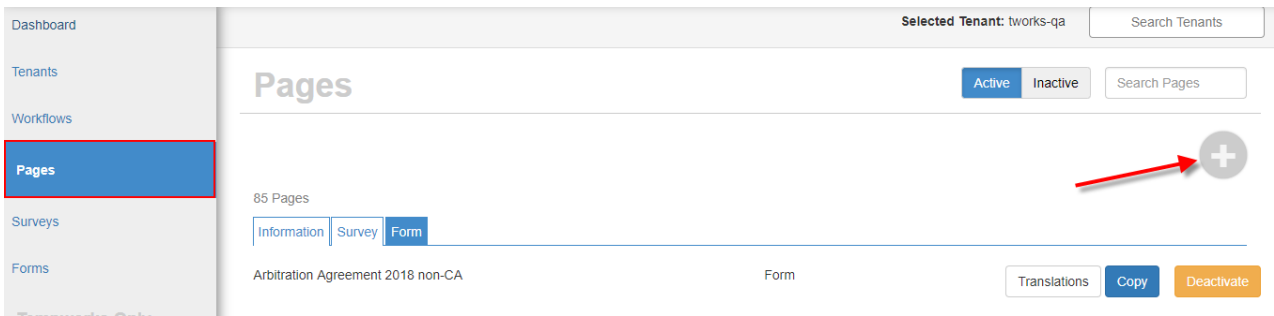
A great example of this might be an **offer letter template**. In this example the service rep will send the template to the employee, if set up correctly, the template will instead be initially sent to the services reps HRCenter. The service rep can then login and enter information in fields that may be empty and afterwards submit that offer to the employee to be reviewed and or signed.

If a single recruiter first page is part of a larger workflow, the individual page will have to be completed by the service rep before the employee will have access to the entirety of the workflow.

## Creating a Recruiter First Form Page

To create this type of form page you must first create the forms necessary for both the service rep and the employee. To determine whether or not a custom form will need to be developed, please see [When and When Not to Use the HRCenter Form Builder](#). If you have determined that a custom form is not necessary, please see the article for [HRCenter Form Builder](#).

Once you have created a form for both parties, create a form page using the 'Pages' section of HRCenter admin.



**\*Note\*** For more info on creating pages check out [How to Create Pages](#).

## Create Page

### Basic Settings

A page is where you decide how you want to present the information to your applicants. We support anything from html forms to survey question type pages.

#### Internal Name

Offer Letter 11.7.18

#### Display Name

Offer Letter

#### Page Type

- Information**  
Use a preset template to collect a set of information, such as personal info or work history. You can customize which questions are shown and required.
- Survey**  
Use a custom question-and-answer formatted block. These need to be created on the Surveys page first.
- Form**  
Upload an HTML file for the user to fill out. These should be self-contained and include any necessary javascript, styling, etc. inside the file.

Step 1



Select the correct forms for both the applicant and the service rep to use respectively. Take care to note the signer order, this is what will determine who will receive the form first.

The service rep should receive the document first and thus should have the "signer order" of '1'. The applicant/employee should have the "signer order" of '2':

Use Premade

Create Custom

## Premade Form

Select the form by name below.

Applicant

Hillview Offer Letter Employee form

Applicant Signer Order

2

Service Rep

Hillview Offer Letter Service Rep form

Service Rep Signer Order

1

Localizations: Applicant Service Rep

[add localization](#)

Step 2



The form page is now a "recruiter first form page" and may be configured like any other form page. This page can now be inserted into any workflow or sent as an individual page.

## Utilizing Recruiter First Form Pages

The Recruiter first form process can be broken into four simple steps:

1. Assigning the employee the form page or workflow in Enterprise or Beyond.
2. The service rep logs into HRCenter, completes the form, and submits it to the employee.
3. The employee logs into HRCenter, completes the form, and submits it for processing.
4. The onboarding processor reviews the page in Enterprise or Beyond.

A recruiter first form page that has been assigned to an employee will first appear in **the service rep that sent it's HRCenter**. The page can be assigned like any other page from within either Enterprise or Beyond.


### HRCenter as the Service Rep

Once assigned, the service rep may then sign into HRCenter with their web user account credentials. These credentials that belong to a service rep are **not the same** as their credentials that they use to login to Enterprise or Beyond. To learn more about creating login credentials for service reps please see: [Managing Service Rep Web User Accounts](#)



Welcome to tworks-qa

Apply Now

 [I have a username and password and want to log in»](#)  
[I need to register»](#)

Account Recovery

[Forgot Username](#) · [Forgot Password](#)



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**\*Note\*** This is the same portal the employee will login in to finish the form.



## Sign In

Please enter your information to log in.

Username

Alexander.swanson25

Password

.....|

Remember me?

Account Recovery

[Forgot Username](#) · [Forgot Password](#)

« back

Continue Application »



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Once signed in the service rep will have access to their "HRCenter Dashboard". This dashboard will present any workflows/additional pages belonging to employees the service rep has sent documentation to. Selecting the page or workflow will take the service rep into the form:

# QA HRCENTER

## Dashboard

Welcome to your Dashboard. Here you will be able to navigate to each of your current and completed workflows

### Secondary Workflows

Additional Pages (B.Adams@xip.xom) **Pages (Unstarted)**



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Now the document can be seen and interacted with just as an employee would interact with the document. Fields marked red are required to continue. Once completed the service rep can select 'Save and continue' to be pushed onto any additional pages:

**Pages**

Offer Letter  
Step Review

Exit
Previous **Save and Continue**

---

### Offer Letter

This field is required.

This field is required.

This field is required.

This field is required.

**EMPLOYMENT OFFER LETTER**

I am pleased to offer you a full-time position as a Welder with our company, effective [redacted]. This start date is flexible so please let me know if this date is not convenient for you. You will report to [redacted].

Compensation of \$ [redacted] per hour. Normal office hours are between 7am and 8pm. [redacted] will determine a set schedule between the above hours.

As a full-time employee, you will be eligible to participate in our full suite of employee benefits following a 60-day probationary period. These benefits include Health and Dental insurance as well as employer-paid premiums for our 401k and Health Savings account plans are also available immediately following the probationary period.

By signing this offer letter, you agree to the terms and conditions of employment and are subject to any pre-existing restrictive covenants (e.g. non-compete) that may be implicated by signing this offer letter. Further, you must successfully pass a criminal background check.

If a page includes a signature field the service rep will be prompted to sign the document:

QA HRCENTER Hello Alexander.swanson25 Log off

Pages

Exit Previous Save and Continue

## Offer Letter

I hereby confirm that I have read and understand all of the information included on "Offer Letter". All information is true and accurate to my knowledge.

Please enter your full name as your signature.

Upon completion, the document may be submitted to the employee for review and signature. If part of a workflow they will now be able to begin that workflow:

QA HRCENTER Hello Alexander.swanson25 Log off

Pages

✓ Offer Letter Step Review Exit Previous Submit

## Step Review

All questions have been answered in this step of the application.

You may still go back and fix any inaccurate information at this point.

When you are confident that all information on your application is correct, click the "Submit" button. By submitting, you are verifying that all information is complete and accurate. You will not be able to change any answers after it is submitted.

You may also review the documents that were generated with your signature to make sure they are accurate:

- Offer Letter

tempworks

Service reps will only see pending workflows within their dashboard:

QA HRCENTER Hello Alexander.swanson25 Log off

# QA HRCENTER

## Dashboard

Welcome to your Dashboard. Here you will be able to navigate to each of your current and completed workflows

Sorry, you currently have no workflows.

tempworks

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## HRCenter as the Employee

The employee will be notified via email once the page is available to review. After logging in, they will be able to complete and sign the document as normal:



## Dashboard

Welcome to your Dashboard. Here you will be able to navigate to each of your current and completed workflows

### Incomplete Workflows

<b>Additional Pages</b>	<a href="#">Continue</a>
<b>Pages</b> Incomplete	Started just now



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When interacting with the form any information entered by the service rep will persist and the employee will only need to interact with fields required of them:

QA HRCENTER
Hello B.Adams Log off

**Pages**

**Offer Letter**  
Step Review

Exit

Previous
Save and Continue

---

## Offer Letter

**EMPLOYMENT OFFER LETTER**

I am pleased to offer you a full-time position as a **Welder** with our company, effective **11/19/2018**. This start date is flexible so please let me know if this date is not convenient for you. You will report directly to **Harry Thompson**.

Compensation for this position will be a yearly salary of **\$ 36000.00**. Normal office hours are between 7am and 8pm. Once your training is complete, we will determine a set schedule between the above hours listed.

As a full-time employee, you will be eligible to participate in our full suite of employee benefits following a 60-day probationary period. The benefit packages include Health and Dental insurance as well as employer-paid premiums for life/AD&D, LTD and STD. Participation in our 401k and Health Savings account plans are also

The employee will sign the document normally:



CA HRCENTER Hello B.Adams Log off

Pages Offer Letter Step Review

Exit Previous Save and Continue

## Offer Letter

I hereby confirm that I have read and understand all of the information included on "Offer Letter". All information is true and accurate to my knowledge.

Please enter your full name as your signature.

Bryan Adams

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Finally, the document will be submitted for processing:

CA HRCENTER Hello B.Adams Log off

Pages Offer Letter Step Review

Exit Previous Submit

## Step Review

All questions have been answered in this step of the application.

You may still go back and fix any inaccurate information at this point.

When you are confident that all information on your application is correct, click the "Submit" button. By submitting, you are verifying that all information is complete and accurate. You will not be able to change any answers after it is submitted.

You may also review the documents that were generated with your signature to make sure they are accurate:

- Offer Letter

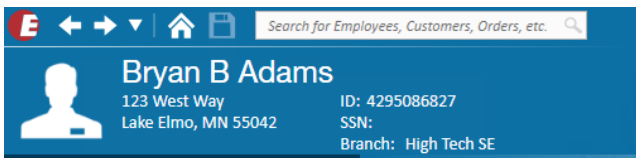
tempworks

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## Processing Pages

Any page or workflow completed by an employee must be processed. This can be performed in either Enterprise or Beyond within their respective processing area's for onboarding material.

Enterprise:


**Bryan B Adams**  
 123 West Way  
 Lake Elmo, MN 55042  
 ID: 4295086827  
 SSN:  
 Branch: High Tech SE

Search for Employees, Customers, Orders, etc.

ALEXANDER.SWANSON: High Tech Staffing

No tasks to display for your current filter settings

tasks appointments social email

**status**  
 Username: B.Adams  
 Workflow History: Additional Pages  
 Current Step: Pages

**details**  
 Workflow Created: 11/7/2018 4:40:46 PM  
 Workflow Completed:  
 Workflow Rejected:  
 Rejected Reason:  
 Step Status: Submitted  
 Step Started: 11/7/2018 4:42:12 PM  
 Step Submitted: 11/7/2018 4:46:41 PM  
 Step Completed:

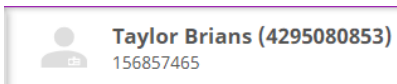
**Selected Workflow Steps**  
 Pages

Review Pages

No Records Found

Reject Unlock  There are no additional steps. Mark completed.

Beyond:


**Taylor Brians (4295080853)**  
 156857465

VISIFILE DETAILS DOCUMENTS MESSAGES ASSIGNMENTS STORY REFERENCES ...

Taylor Brians (4295080853) \ Onboarding \ Additional Pages \ Pages

Workflow: Additional Pages  
 Steps: 1 Pages (SELECTED)

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