

# Contingent Talent Management

## Workforce Portal Apply Feature

### Overview

The Contingent Talent Management (CTM) Solution includes an optional feature which enables applicants to apply through Workforce Portal with a mobile friendly experience. Workforce Portal and the Apply feature are a responsive web application, which optimizes the user experience on all browsers and device screen sizes.

### Prerequisites

1. Workforce Portal Apply requires Workforce Portal to be enabled in your CTM site.
  - a. If you have not yet enabled Workforce Portal:
    - i. Please review the various help documents and videos located in the CTM > Support section, under the 'Workforce Portal' tab.
    - ii. The Workforce Portal feature must be enabled in your CTM site by contacting CTM Support. You can reach them at [ctmsupport@healthcaresource.com](mailto:ctmsupport@healthcaresource.com)
2. The Workforce Portal Apply feature must be enabled in your CTM site by contacting CTM Support. You can reach them at [ctmsupport@healthcaresource.com](mailto:ctmsupport@healthcaresource.com)

### For Administrators: Review CTM System settings for Workforce Portal Apply

1. At the Admin Tab > Regions screen, select or create a Region to designate as the default Region for new Applicants.
  - a. *If a new Region is created, ensure that the appropriate CTM users working with new Applicants have permission to access the Region.*
2. At the Admin Tab > Lines of Business screen, review and add appropriate Lines of Business to align with your areas of Staffing, such as Nursing, Allied Health, Rehab, Pharmacy, etc. The 'Default' Line of Business will not display in Workforce Portal Apply because the term is not recognizable by new Applicants. You can rename the line of business named **Default** to something else if desired, which will enable it to display. You can also add new Lines of Business as necessary.
  - a. *If new Lines of Business are added, ensure that the appropriate CTM users working with new Applicants in each Line of Business have permission to access the Line of Business.*

3. At the Admin Tab > Certifications screen, map the appropriate Certifications to the Line of Business.

Certification ✕

\* indicates required field

<b>Certification Name *</b>	<input type="text" value="RN"/> <small>Please contact Support to modify name.</small>
<b>Abbreviation *</b>	<input type="text" value="RN"/>
<b>LOB *</b>	<input type="text" value="Nursing"/>
<b>Mapped Specialties</b>	<input type="checkbox"/> ER <input type="checkbox"/> ICU <input type="checkbox"/> Med/Surg <input type="checkbox"/> Emergency Medicine <input type="checkbox"/> NICU <input type="checkbox"/> FNP <input type="checkbox"/> CNS
<b>Display in Credentialing *</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<b>Credentialing Alias</b>	<input type="text" value="Registered Nurse"/>
<b>Status</b>	<input checked="" type="checkbox"/> Active <input type="checkbox"/> Disabled <small>2167 Temp(s) using this Certification 2685 Order(s) using this Certification</small>

Select a Line of Business mapping for each Certification which needs to display in the Workforce Portal Apply screen

Map each applicable specialty to the Certification. This will control which Specialties display in Workforce Portal Apply when the applicant chooses the Certification.

If you would like to display a longer version of the Certification name in Workforce Portal Apply, such as 'Registered Nurse', change this value

4. At the Admin Tab > Workforce Portal Settings screen:

a. On the **Application** tab:

- i. Set the **Default Application Region** as the desired Region for new Applicants. As new applicants create a record in CTM, they will be created in this Region.
- ii. Set the **Number of Required Professional References** as the number of references required during your application process.
- iii. Set the **Display Referral Fields** as desired.
- iv. Set the **Legal Question Display** to reflect which legal questions should be displayed to new Applicants.
- v. Set the **Application Acknowledgement Statement** as the language which will display at the end of the application process, just before the Applicant signs the application.
- vi. Set the **Post Statement** as informational text to display after the application has been completed.
- vii. Set the **Application Notification Email** as the email address which should receive notifications when new Applicants have completed the application. We recommend using an email distribution group for this field.
- viii. Set the **Primary Discipline Instructions** and **Primary Specialty Instructions** text fields if you'd like to update the default values. These labels will display as contextual help labels when the applicant is completing the initial quick apply page in Workforce Portal.
- ix. Set the **Number of Additional Certs allowed** and **Number of Additional Specs allowed** settings. These settings will limit the number of additional values which can be selected when new applicants apply.

- b. On the **Form Fields** tab:
  - i. For each section (**Personal, Preferences, and Experience**), review the available question fields. Display of each application question is controlled by setting the **Display Field On Form** option as desired. To make the question required as part of the application, set the **Is Field Mandatory** value to **Yes**.
5. If you would like the signed applications for new applicants to be mapped to a CTM credential, ensure that you have configured an Online Application credential. Use the following steps to configure an Application credential in CTM:
  - a. At the CTM Admin Tab, choose **Agency Compliance Settings**.
  - b. If you need a new Credential Category for the Online Application:
    - i. Navigate to the **Credential Categories** administration screen
    - ii. create the desired Credential Category
  - c. From the CTM **Agency Compliance Settings** administration screen, navigate to the **Credentials** administration screen.
  - d. Filter to the desired Credential Category where the Online Application credential should exist.
  - e. If a new credential needs to be created, create the Online Application credential under the desired category by filling out the last open row for the desired Credential Category.
    - i. Ensure that the credential is set to **Always Display**.
    - ii. Choose the **Add** action to create the credential.
  - f. Navigate to the CTM Admin Tab and choose **Agency Compliance Settings** again.
  - g. Navigate to the **Set ARS Application Credential** screen.
  - h. In the dropdown, select the Online Application credential you created or identified previously and click **Save**.

## For Administrators: Directing Applicants to the Workforce Portal Apply page

Applicants can reach the Workforce Portal Apply area in a few different ways. The application URL supports the following workflow options:

1. Existing Workforce Portal users can share the Workforce Portal login page with anyone they would like to refer to your company. The 'Apply Now' button is visible on this page using the following url pattern:
  - a. Your **Training** site:  
[https://ctmscs.contingenttalentmanagement.com/YOURSITENAME\\_training/WorkforcePortal](https://ctmscs.contingenttalentmanagement.com/YOURSITENAME_training/WorkforcePortal)
    - i. **Example:** with a sitename of **dallasinnovation**, the training url is  
[https://ctmscs.contingenttalentmanagement.com/dallasinnovation\\_training/workforceportal](https://ctmscs.contingenttalentmanagement.com/dallasinnovation_training/workforceportal)
  - b. Your **Production** site:  
<https://ctms.contingenttalentmanagement.com/YOURSITENAME/WorkforcePortal>
    - i. **Example:** with a sitename of **dallasinnovation**, the production url is  
<https://ctms.contingenttalentmanagement.com/dallasinnovation/workforceportal>
2. There is a shorter Quick Apply url which will route Applicants directly into the first step of the application process, skipping the initial Workforce Portal Login screen. This uses the following url pattern:
  - a. Your **Training** site:  
[https://ctmscs.contingenttalentmanagement.com/YOURSITENAME\\_training/quickapply](https://ctmscs.contingenttalentmanagement.com/YOURSITENAME_training/quickapply)
    - i. **Example:** with a sitename of **dallasinnovation**, the training url is  
[https://ctmscs.contingenttalentmanagement.com/dallasinnovation\\_training/quickapply](https://ctmscs.contingenttalentmanagement.com/dallasinnovation_training/quickapply)
  - b. Your **Production** site: <https://ctms.contingenttalentmanagement.com/YOURSITENAME/quickapply>
    - i. **Example:** with a sitename of **dallasinnovation**, the production url is  
<https://ctms.contingenttalentmanagement.com/dallasinnovation/quickapply>
3. You can place a direct link to the Workforce Portal Apply process on various websites, job boards, and more. The links also support the ability to track the various locations and job postings which are driving applicants into CTM. To do this, add tags to the end of the URL, **after a question mark**, using a pattern of **tagName=tagValue**. Add multiple tags separated by the ampersand as needed to track the URL referrals.
  - a. **TIP: One of the unique tags will enable a new applicant to be placed into a specific CTM Region, rather than defaulting to the standard region for new applicants. This tag is used by including the region=regionID pattern, where the regionID is equal to the CTM Region ID. CTM Region IDs can be found in CTM > Admin Tab > Regions.**
4. Examples of usage:
  - a. [https://ctmscs.contingenttalentmanagement.com/dallasinnovation\\_training/quickapply?referredBy=LinkedIn](https://ctmscs.contingenttalentmanagement.com/dallasinnovation_training/quickapply?referredBy=LinkedIn)
  - b. (Add applicant to a specific CTM Region.)
    - i. [https://ctmscs.contingenttalentmanagement.com/dallasinnovation\\_training/quickapply?region=4](https://ctmscs.contingenttalentmanagement.com/dallasinnovation_training/quickapply?region=4)
  - c. [https://ctmscs.contingenttalentmanagement.com/dallasinnovation\\_training/WorkforcePortal/quickapply?jobid=12345&referredBy=glassdoor](https://ctmscs.contingenttalentmanagement.com/dallasinnovation_training/WorkforcePortal/quickapply?jobid=12345&referredBy=glassdoor)
  - d. [https://ctmscs.contingenttalentmanagement.com/dallasinnovation\\_training/WorkforcePortal/quickapply?jobid=12345&referredBy=yourCompanyWebsiteApplyNowButton](https://ctmscs.contingenttalentmanagement.com/dallasinnovation_training/WorkforcePortal/quickapply?jobid=12345&referredBy=yourCompanyWebsiteApplyNowButton)

## Applicant Experience

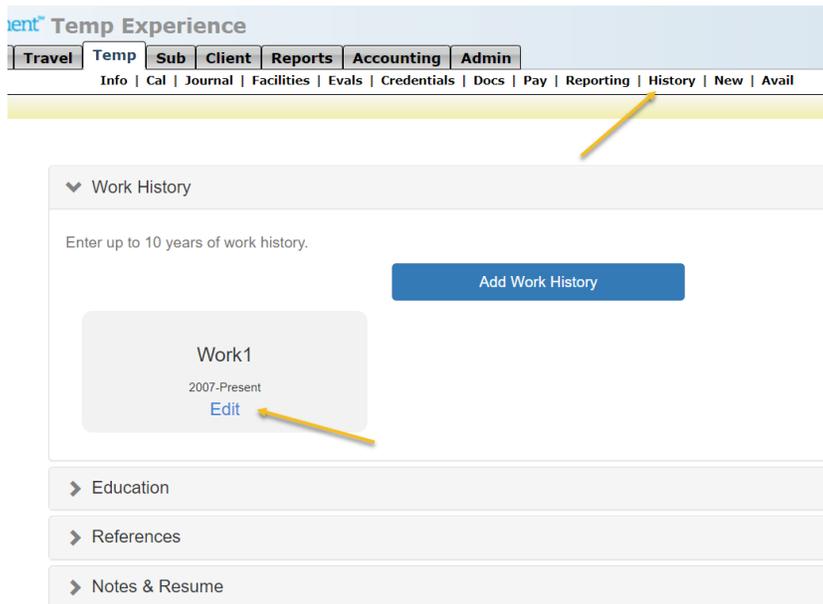
1. The first step of the process asks the applicant for their email address. CTM will search for the email entered by the applicant and attempt to match it with an existing CTM Temp Profile.
  - a. The following rules are followed when a matching email is found in CTM:
    - i. If the CTM Temp Profile is in a status of **Active**, they will see a message that they already have information on file in CTM and they will need to contact their representative. This is to ensure that Active workers do not inadvertently apply again.
    - ii. If the CTM Temp Profile is in a status of **Terminated**, they will see a message that they will need to contact their representative. This is to ensure that **Terminated** status workers do not apply again.
    - iii. If the CTM Temp Profile is found to already have an existing login to Workforce Portal, they will see a message that a login was already found and that they should visit the login page to access their account.
2. Once the applicant has logged into Workforce Portal, the Applicant workflow will be displayed. The applicant will see various sections which need to be completed, including:
  - a. Personal Info
  - b. Work Preference
  - c. Credentials
  - d. Experience
    - i. Work History
    - ii. References
    - iii. Resume Upload
3. The application provides navigation options to proceed to the next section and previous sections if desired. Each of the required fields in these sections must be completed by the applicant.
4. Once the applicant has completed each required field, they will see the **Acknowledge** section. This section will display the selected legal questions and configured Acknowledge text. The applicant must complete each question and then sign the Application.
5. If an Online Application credential is configured as described in the **Review CTM System Settings** section above, then then a PDF file containing all answered application questions and signature will be generated and placed on file in the applicable CTM Temp Profile Credential. If no Online Application credential is configured, then the signed PDF will be placed on file in the CTM Temp Profile **Documents** screen.

## For CTM Users: Review progress, verify Work History and References

As the applicant is completing their application, the CTM Temp Profile will be updated immediately.

### Work History

1. If you'd like to verify Work History, open the CTM Temp Profile and navigate to the **History** section.
2. **Edit** the Work History entry



**Temp Experience**

Travel | Temp | Sub | Client | Reports | Accounting | Admin

Info | Cal | Journal | Facilities | Evals | Credentials | Docs | Pay | Reporting | History | New | Avail

Work History

Enter up to 10 years of work history.

Add Work History

Work1  
2007-Present  
[Edit](#)

Education

References

Notes & Resume

3. Enter an **Evaluation Date** and **Save** the Work History Entry.



Postal Code  
75001

Job Title \*  
RN

Rate  
Rate

Jnit  
Unit

Jnit Level  
Job Title

Jnit Beds

Comments

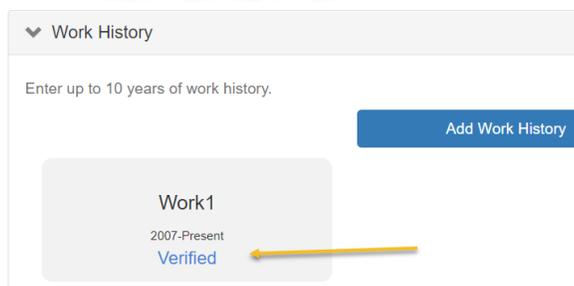
Evaluator's Name  
Evaluator's Name

Evaluation Date  
mm/dd/yyyy

A value here will prevent the worker from editing this record in WorkforcePortal.

Close Save changes

4. The Work History entry will display as **Verified**. Verified Work History will be set as Read-Only, and the Applicant will no longer be able to edit the entry.



Work History

Enter up to 10 years of work history.

Add Work History

Work1  
2007-Present  
Verified

## References

1. If you'd like to verify References in CTM, open the CTM Temp Profile and navigate to the **History** section.
2. **Edit** the Reference entry
3. Complete the reference notes or evaluation as needed
4. Enter either **Verbal** or **Written** for the Reference Check **Method** and **Save** the Reference Entry.
5. The Reference entry will display as **Verified**. Verified References will be set as Read-Only, and the Applicant will no longer be able to edit the entry.

## For CTM Users: Notifications

1. As new applicants apply through Workforce Portal, CTM will send an email notification to the address listed in the Admin Tab > Workforce Portal Settings > Application > **Application Notification Email** field.
2. At the **Main Tab** of CTM, at the top right of the page, navigate to the **User Alerts** screen.
3. Under the **Temp Profile Events** tab, various email notification subscriptions are available for CTM Users. The relevant events for the Workforce Portal Apply process are the **Application Started** and **Application Completed** events. If the CTM User is associated to the CTM Temp Profile as their **Recruiter, Staffing Specialist, or Compliance Manager**, then they can subscribe to these events and will be notified by email when they occur. Use the following steps to subscribe to an event:
  - a. Select the **Edit** link near any **Inactive** event in the tab
  - b. Select the **From** value of **Staffing** and **Save**
  - c. The Event should change from **Inactive** to **Active**. This indicates that the CTM user is now subscribed to receive email alerts when this event occurs.