

Contingent Talent Management

Workforce Portal Skills Checklists Feature

Overview

The Contingent Talent Management (CTM) Solution includes a new optional feature which enables applicants to complete Skills Checklists through Workforce Portal with a mobile friendly experience. The new Skills Checklist experience works well on all browsers and device screen sizes.

Prerequisites

1. Workforce Portal Skills Checklists 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
2. The Workforce Portal Skills Checklists feature must be enabled in your CTM site by contacting CTM Support. You can reach them at ctmsupport@healthcaresource.com

For Administrators: Review CTM System settings for Workforce Portal Skills Checklists

1. **For customers using the CTM Credentialing Solution (RSS):**
 - a. Review the following document for more information regarding the Skills Checklist migration process, used to migrate legacy Skills Checklists from the Credentialing Solution to the Staffing Solution and Workforce Portal:
https://media.healthcaresource.com/public/ContingentTalentManagement/Product/WorkforcePortal_CredentialMigrationManager.pdf
2. At the **Admin Tab > Workforce Portal Settings** screen:
 - a. On the **Temps** tab:
 - i. Set the **Auto-Assign New Hire Requirements** option based on your desired preference.
 1. If set to **Yes**, any Credentials set with an auto-assign process point of New Hire will be assigned automatically when the CTM Temp Profile is set to a **Worker** experience in Workforce Portal from the main Temp Profile screen.
 - b. On the **Notifications** tab:
 - i. Set the **Temp Assignment Reminder** values based on your desired preference. These settings will send automatic follow-up reminder emails to any Workforce Portal user who has not yet completed an assigned Skills Checklist.

3. At the **Admin Tab > Agency Compliance Settings > Credentials** screen:
 - a. Filter for the category of **Mobile Skills**.
 - b. Edit each of the Mobile Skills Checklists you intend to use and set the compliance requirements, such as Expiration Date, Requirements Completed Date, Documents, and Verification.
4. At the **Admin Tab > Agency Compliance Settings > Credential Requirements** screen:
 - a. Edit or Add Requirements for each Skills Checklist you intend to use in the Mobile Skills category.
 - b. If you'd like to Auto-Assign Skills Checklists as soon as new Applicants start an Online Application, edit the Credential Requirement and select the **Auto-Assign** value as **Application Start**.

For CTM Users: Manually assign a Skills Checklist to a Workforce Portal user

1. Skills Checklists can be manually assigned from the CTM Temp's **Credentials** screen if needed:
 - a. Open the **Select Credentials** link from the CTM Temp's Credentials page
 - b. Filter for the Category of **Mobile Skills**
 - c. Select the Skills Checklist which needs to be assigned
 - d. Save the page
 - e. At the bottom of the page, under the **Mobile Skills** category, the selected Skills Checklist row will be visible. Click the **Assign** link to manually assign a Skills Checklist.
 - i. This action will email the CTM Temp using their primary email address, notifying them that a Skills Checklist has been assigned. The link in the email will direct the user into Workforce Portal to complete their Skills Checklist
 - f. After the page is refreshed, the Skills Checklist will show in a status of **Assigned**.

Workforce Portal User Experience for Skills Checklists

1. Once a Skills Checklist is assigned to a Workforce Portal user, when the user logs into Workforce Portal they will see a **Skills** tile with an indicator that a Skills Checklist needs to be completed.
2. The user will complete each section of the Skills Checklist, navigating to the next page once each section is complete.
3. When all sections of the Skills Checklist have been completed, the **Complete** button will be available at the top left area of the screen.
4. When the user selects the **Complete** button, a PDF file will be generated and placed on file under the assigned Skills Checklist in the CTM Temp's Credentials screen, along with the requirement completed date.

For CTM Users: Notifications

1. At the **Main Tab** of CTM, at the top right of the page, navigate to the **User Alerts** screen.
2. Under the **Temp Credential Events** tab, various email notification subscriptions are available for CTM Users. 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.