

knowledge services

Getting Started

Client Guide - Posting Requestor/Time Approver

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Activate Your Account

To activate your account, the MSP must first create it

Once created an activation email is sent with a link to activate the account

1. Click the secure **link** provided in the email
2. **Complete the form** entirely and click **Activate**
3. A success message appears. Click **OK**
4. **Login** utilizing the newly created credentials

For assistance, contact the Support Team at Knowledge Services

Retrieve Username

1. From the login screen, click the **Forgot Username?** hyperlink
2. Enter your **email address**
3. Select **Submit**. A message for review appears, click **OK**. Upon clicking ok, an automated email request is sent
4. Locate email with provided username and **click the link** to login
5. Type in provided username and your password
*If password is unknown, follow the **Reset Password** steps*

For assistance, contact the Support Team at Knowledge Services

Unlock Account

1. From the login screen, click the **Unlock Account?** Hyperlink
2. Enter your Username
3. Select an unlock option:
 - a. **Unlock via Email:** An email is sent with a code
*If **Unlock via Email** is selected, then you will click **Send me an email***
 - b. **Unlock via Phone:** An SMS code will be sent to the number on file
*If **Unlock via Phone** is selected, then you will click **Receive a code via SMS***
Note: *If you have not setup SMS verification, no code will be sent*
4. Enter the provided code into the box and select **Verify**
5. Answer your **Security Question**
6. Enter your **Password**
7. Click **Verify**

For assistance, contact the Support Team at Knowledge Services

Reset Password

1. From the login screen, enter your **Username**
2. Click **Next**
3. Press the **Forgot Password?** Hyperlink 4. Select a reset option:
 - a. **Reset via Email:** An email is sent with a code
*If **Reset via Email** is selected, then you will click **Send me an email***
 - b. **Reset via Phone:** An SMS code will be sent to the number on file
*If **Reset via Phone** is selected, then you will click **Receive a code via SMS***
Note: *If you have not setup SMS verification then this option will not appear*
5. Enter the provided code into the box and select **Verify**

6. Answer your **Security Question**
7. Enter your **New Password** and then **Re-enter** it
8. Click **Reset Password**

For assistance, contact the Support Team at Knowledge Services

Create a Posting

These steps are for Staff Augmentation and Pre-Identified (EOR) positions only. Statement of Work/Milestone (SOW) Postings are created differently.

Adding/Viewing Postings

1. Utilize the navigation menu by selecting the **hamburger icon** in the upper left-hand corner.
To pin the menu to “always open,” click the pushpin icon.
2. Select **Postings** from the menu.
3. Click on **View Postings**
4. A list of current postings created within the last 30 days will appear
 - a. Use the **date selection zone** to bring forward postings of interest
 - b. Results can further be filtered by entering the relevant search term in the related column, clicking the dropdown button, and choosing the appropriate filter parameter (e.g. Contains, Starts With, Equal To, etc.)
 - i. *If entering a date such as “05/21/2022,” choose the “Equal To” filter*
 - ii. *If entering a status, such as “Active,” choose the “Contains” filter*
 - c. For even greater detail, **double click** on the posting to access full posting information
 - d. **Export** displayed results by selecting the “Export” option
5. Click the orange **Add button** in the upper left-hand corner to add a Posting 6. Select an option based on the type of position you need filled:
 - a. **Staffing Based:** Outsourced contract labor through competitive bidding
 - b. **From a Template:** Program created templates to choose from. Template is recommended for all Pre-Identified Candidates/EOR
 - i. *If selected, locate the template, and double click to open*
 - ii. *If the position is for a pre-identified candidate/EOR, locate the template titled “Pre-Identified Candidate / EOR” and double click to open*
 - c. **From Existing:** Create a Posting from one that already exists.
 - i. *If selected, locate the Posting you wish to use, and double click to open*
 - d. **Milestone Based / SOW:** Do not select this option.

Position Overview

Position Overview is a required section. Because all fields in this section are required, for those fields that do not apply to your job posting, enter N/A into the text box.

Please reach out to the Managed Service Provider if additional fields need to be added or for more information regarding additional fields

1. **Position Title** will auto-populate as fields are selected below in the form
2. Use the **Posting Status** dropdown to select the status of the Posting
 - a. **Draft:** Not visible or available to the Vendors
 - i. *Use this option when drafting a posting before setting it to “Active”*
 - b. **Forecast:** Visible and available to the Vendors

i. This status lets the Vendors know the position is for a future position and is not needed right away

3. Use the **Urgent** dropdown to select Yes or No
4. Set the **Closing Date & Time** and use the dropdown to select the **Time Zone**
 - Upon the selected date and time, the posting will automatically update to a status of “**No Longer Accepting Proposals**”
5. Use the **Time Zone** dropdown to select the appropriate zone for the closing date and time
 - By leaving the time zone marked **N/A**, the posting will stay active until 12:01am on the **Posting Expiration Date**
6. Select a **Posting Expiration Date**
 - Upon selected date at 12:01am, the posting will automatically update to a status of **Expired** and no longer be visible to the Vendors
7. Select the **Position Category**
 - a. **No Billing for OT**: not eligible for billable overtime
 - b. **Eligible to Bill OT**: eligible for billable overtime
8. Use the **Job Title** dropdown to select the appropriate job title
9. Use the **City** dropdown to select the appropriate city
10. Use the **State** dropdown to select the state
11. Use the **Category** dropdown to select the category
 - Labor categories include Admin, IT, Medical, or Statement of Work
12. Use the dropdown to select **Competition Type**
13. Complete **all other fields** as required. *Type or select N/A for fields that do not apply*
14. **Freetext** is a required text field. *Utilize the field to type the working job title*

Position Information

1. In the **Hours/Week** field, enter the expected hours worked per week for the position Only whole numbers are allowed
2. Use the **Shift** dropdown to select the shift type
 - a. **Day**: The position is for daytime shifts (ex. 7:30am – 4:00pm)
 - b. **Evening**: The position is for evening shifts (ex. 12:30pm – 9:00pm)
 - c. **Night**: The position is for night shifts (ex. 9:30pm – 6:00am)
 - d. **Multiple**: Varying shifts will be worked
3. Use the **Weekend** dropdown to identify if work will be performed on Saturday and/or Sunday
 - a. **None**: Position does not require work to be performed on the weekend
 - b. **Every**: Position does require work to be performed every weekend
 - c. **Every other**: Position does require work to be performed every other weekend
 - d. **Varied**: Varying shifts will be worked on the weekend
4. Use the **Start Time** dropdown to select the time the shift will start
5. Click the calendar icon to select the **Projected Start Date**
6. Use the **End Time** dropdown to select the expected shift end time
7. Use the **Project End Date/Duration** dropdown to select when the position will end
 - a. **Set Date**: Select this option if you know the expected date the position will end
 - i. Use the **calendar icon** to select the date*
 - b. **Set Time Period**: Select this option if you know the expected amount of time the position will last

- i. Enter the **quantity** and then use the dropdown to select the **type** (hours, days, weeks, months, or years)
 - c. **No Set End Date**: Select this option if there is not an expected end date in mind
 - i. Enter a **quantity** and then use the dropdown to select the **type** (hours, days, weeks, months, or years) to indicate at least how long the position will last
- 8. In the **Number of Positions** field, type the number of positions that need to be filled
- 9. Use the **Minimum Education** dropdown to select the minimum education requirement for the position
- 10. Use the **Job Type** dropdown to select an option:
 - a. **Staff Augmentation (recommended)**: Contract position with no intent to hire within
 - b. **Contract To Hire**: Contract position with the intent to hire within a pre-identified amount of time
 - c. **Direct Hire**: Utilized a preferred Vendor to obtain and hire within. No contract labor involved.
- 11. Use the **Desired Career Level** dropdown to select the appropriate experience level required for the position
- 12. Use the **Bill Type** dropdown and select one of the following bill types:
 - a. **Hourly**: The client will be billed per hour for the time worked
 - b. **Daily**: The client will be billed per unit for the time worked
- 13. Use the **Bid Limit Per Vendor** dropdown to select the number of candidates the Vendor is allowed to submit to the posting

Position Description

If you are creating a Pre-Identified Candidate posting, the position description box will be pre-populated with questions determined during implementation. If creating a Staff Augmentation posting, the Position Description section is blank but still a required free text box. For a Staff Augmentation posting, use this field to add any additional information about the posting including:

1. Job Description
2. Expected duties and job functions
3. Maximum allowable bill rate
4. Skills, education, and/or experience requirements
5. Potential for temp to hire
6. Overtime billable
7. Estimated length of the assignment
8. Security checks, licenses, forms, background checks, screenings etc. required for the position
9. Travel requirements
10. Date and time resumes will be reviewed

User Defined Field

Content included in the User Defined Field section is configured based on individual Program preferences and is used differently per Program. It is possible the User Defined Field section will not be used at all. Please reach out to the Program Manager for more information on these additional fields.

Internal Notes

The Internal Notes section is not visible to Vendors; this section is only visible to the MSP and Client. Use this section to keep track of internal posting information.

1. Use the **Requester** dropdown to select the Client Manager who requested the position
2. Type a **Budgeted Hourly Rate** field, enter an hourly rate if applicable
3. In the **Maximum Hourly Rate** field, enter a maximum hourly rate if applicable
 - If a vendor submits a candidate above this amount, they will receive a warning message indicating the submitted rate is above the maximum allowed bill rate. Please note, the vendor can still submit above the maximum hourly rate.
4. In the **Comments** field, type any additional information you would like to include in posting

Security Checks

1. In the **Security Checks Required** section, select **Yes** or **No** if security checks are required for the position
2. Use the Onboarding Category dropdown to select the onboarding package required for this position.
3. In the Security Comments field, type any additional comments if applicable
4. Complete any additional **Security Comments** if necessary
 - This information will auto-populate based on the standard security requirements predetermined by the Program during implementation

Manager Information

In most Programs, the Hiring Manager information is that of the MSP. This is done so Vendors will reach out to the MSP instead of the Client if they need assistance or have questions about the Position.

1. In the **Hiring Manager Name** field, type the hiring manager or MSP's name
2. In the **Hiring Manager Phone** field, type the hiring manager or MSP's phone number
3. In the **Hiring Manager Email** field, type the hiring manager or MSP's email address

Location

When completing this section, use the address to which the Resource will be reporting when on assignment.

1. Type the street **Address**
2. Use the dropdown to select the **State**
3. Type the **City**
4. Type the **Zip Code**

Travel

1. In the **Travel** section, select **Yes** or **No** to indicate if travel is required for the position
2. In the **Travel Comments** box, type any necessary travel comments

Resume Ranking

It is not suggested that this information be edited.

Skills Profile

It is not suggested that this information be edited.

Attachments

The Attachment section should be used to add any additional relevant documents such as a Job Description, Client Forms, or Reference Documents to the posting.

1. Click the **plus sign** next to the Attachments section
2. In the **File Name** field, type a name for the file you would like to attach
 - This does not have to be the exact name of the file you wish to upload
3. Click **Select**
4. Locate and select the file you wish to attach
5. Click **Upload**
6. Click **Save**
7. Repeat steps 2 – 6 to upload additional attachments

Posting Vendor List

It is not suggested that this information be edited.

Approvers

The Approvers section is only utilized by programs with Posting Approval Workflows. Only add approvers if instructed to do so.

Form Access

Use the Form Access section to add Client Users to the posting. By doing this, the Client User will have access to view the posting and all related bids will appear in the View Bids portal.

1. Click the **plus sign** next to **Form Access**
2. Use the filter to locate the Client User you wish to add
3. Select the check box
4. In the **Posting Access Selected** list, click the **single down arrow** to move individuals into the list 5. Click **Save**

Can allow the user to have edit rights, by checking the associated box under Form Access.

Saving the Posting

After all required fields in the posting form have been completed, the job posting needs to be saved.

1. Scroll to the top of the form and click **Save**
 - A posting ID# will be created and can be used to reference the posting in the future

Referencing the Posting

Once all required fields are completed and the posting has been saved, it is possible to create a posting template for future use to save time when creating a similar Staff Augmentation posting. To utilize the template for future positions, select the type “From a Template” when creating the posting. Do not create a template for Pre-Identified (EOR) postings.

1. Click **Save as Template**
2. Enter a **Title** for the template
3. Type a template **description** if applicable
4. Make the template **Private** or **Public** by checking the appropriate box
 - a. **Private:** Only you will have access to the template
 - b. **Public:** All Users will have access to the template

5. Select **Yes**, to make the template Active
6. Click **Save**

*Only changes to the **Posting Status** field will generate a notification to Vendors of any updates or changes. All edits outside of the status field should be relayed to the MSP, who in turn informs the Vendors.*

Reviewing and Selecting a Candidate

Review Candidates

1. Click **Postings** in the navigation tool in the upper left-hand corner
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed.*
4. **Double click** to open the Posting
5. Click the **Bids** tab
6. All bids for that Posting appear. Click the **Comments** box (*if applicable*) to review any comments left by the Vendor regarding the candidate.
7. Click the **Attachment Icon** to review the attachments. The Document Previewer will appear.
 - **Preview** each document by clicking on it in the document library on the left.
 - **Download** a document by clicking the download icon.
 - **Print** a document by clicking the print icon.
 - **Search** the document for key words such as job requirements, skills, experience by typing words in the binocular field.

Reject Uninterested Candidates

1. Click **Postings** in the navigation tool on the left
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed*
4. **Double click** to open the Posting
5. Click the **Bids** tab
6. **Check the box** for any candidate that is of no interest
7. Click the red **Reject button above**
8. Provide a **reason** and any **comments** for the rejection
9. Click **Reject**.

Upon clicking reject, an automated email is sent to the Vendor and the status of the bid updates to "Rejected by Client"

Interviewing

Initiate the Interview

1. Click **Postings** in the navigation tool on the left
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed*
4. **Double click** to open the Posting
5. Click the **Bids** tab
6. Locate the **candidate(s)** with whom you wish to initiate an interview and **click the box(es)** associated with the line item(s)
7. Click the **Interview** button

8. If desired, toggle the buttons for phone number and email to enable them as required
 - a. *Phone Number: If toggled on (orange), the vendor will be required to enter the candidate phone number*
 - b. *Email Address: If toggled on (orange), the vendor will be required to enter the candidate email address*
 - c. *Attachment: If toggled on (orange), the vendor will be required to add an attachment*

9. A candidate(s) may be removed mid process from scheduling an interview by selecting the black minus sign next to the name

10. Complete the **Interview Details**

Include any required information for the interview along with any important meeting instructions such as location, virtual meeting links or a direct phone number to share with the candidate

*If desired, you can leave the meeting instructions blank initially. If moving forward with blank meeting instructions, the interview will be considered to have missing details. Those with missing details will be signified by an orange caution symbol found in the second column of the **View Interviews** page. Interviews missing details can be filtered on the **View Interviews** page by selecting the filter option **Missing Details**. If electing to proceed with this option, it will be important to return and add in those details later*

- If desired, include additional **interview confirmation recipient(s)** from the drop- down selection

11. Select the interview length, time zone, and time(s)/date(s)

Note: If more than one candidate is selected for interviewing, the times given will be available to all candidates on a first come first served basis.

- **Client Attachments:** Click the **Browse** button to add attachments to the interview request
- **Interview Length:** Select the **Interview Length** drop down to select the overall length of time for the interview(s)
- **Time Zone:** Choose the appropriate **Time Zone** the interview will take place to prepare the interviewee(s)
- **Date Picker:** Click the desired **date** from the calendar box.

If the desired month is not shown; select the orange arrow to advance to the next month

- **Time Picker:** Once the desired day is selected, click the **Start Time** box and auto populated time will appear for selection. Depending on the interview length, the End Time will be set automatically

For as many candidates you select, you must have an equal amount of times/dates for candidates to select from, i.e. if you have five candidates selected, you must have five times/dates selected. Upon confirmation of an interview, the selected date/time will no longer be available

12. Click the **Schedule** button.

Upon clicking Schedule, an automated email request is sent to the Vendor(s) and the status of the bid(s) updates to "Interviewing"

Check the Status of Interviews

1. Select **Postings** from the navigation tool
2. Click on **View Interviews**

3. Use the filter to locate the **Posting** of interest

The Vendor will coordinate the interview with the candidate and act upon the request. An email is sent indicating what action is taken and the status of the bid updates to one of the following:

- **Interview Requested** = The request has been sent, but no action has been taken
- **Interview Confirmed** = The interview has been confirmed. *Double click to see confirmed date and time of the interview along with the resource phone number if applicable*
- **Interview Declined** = The interview has been declined
- **Interview Reschedule Requested** = The candidate is requesting to reschedule at a different date/time. *Double click to confirm or decline the requested date/time*

*If an interview has missing details, it will be signified by an orange caution symbol found in the second column of the page. Interviews missing details can be filtered on the **View Interviews** page by selecting the filter option **Missing Details***

Editing an Interview

This action is intended to be used when details need to be adjusted on the interview such as time zone, meeting URL, meeting instructions, etc.

1. Select **Postings** from the navigation bar
2. Click on **View Interviews**
3. **Double click** on the line item of interview requiring adjustment
4. Click **Edit**
5. **Update** field(s) requiring adjustment
6. Once complete, select **Submit**
7. A message appears asking if you wish to proceed. Click **Yes**

Upon clicking yes, an automated email is sent to the Vendor with the update information. If an interview with a status of Interview Confirmed is edited, an updated calendar invite is sent out

Cancelling an Interview Request

This action is intended to be used when a reason is not needed to be included from the specified drop down

1. Select **Postings** from the navigation bar
2. Click on **View Interviews**
3. **Double click** on the requested interview
4. Click **Cancel Interview**
5. A message appears asking if you wish to proceed. Click **Yes**.

Upon clicking Yes, an email is sent to the vendor informing them the interview has been cancelled

- If necessary, the bid of the resource can now be **rejected** by navigating to View Bids and following the **Rejecting Bids and Closing the Posting** steps

Propose New Time for the Interview

1. Select **Postings** from the navigation bar
2. Click on **View Interviews**
3. **Double click** on the requested interview or the confirmed interview to review request details
 - Pay attention to time zone, location, and instructions such as providing the candidate's phone number or virtual meeting links and information provided
4. Click **Propose New Time**

5. Use the **calendar** and **clock** icons to indicate a date and time of availability
 - You must submit at least **one** date and time to reschedule an interview
6. Type an **explanation** for requesting to reschedule
7. Click **Propose New Time**
8. A message appears asking if you wish to proceed. Click **Yes**

Upon clicking Yes, an email is sent to the vendor requesting the interview be rescheduled and asking that action be taken to confirm/decline the request

Declining an Interview Request

This action is intended to be used when a reason must be selected when removing an interview request

1. Select **Postings** from the navigation bar
2. Click on **View Interviews**
3. **Double click** on the requested interview
4. Click **Decline Interview**
5. **Select** the decline reason. Click **Save**

Upon clicking Save, an email is sent to the vendor informing them the interview has been declined with the specified reason selected

- If necessary, the bid of the resource can now be **rejected** by navigating to View Bids and following the **Rejecting Bids and Closing the Posting** steps

Complete Interview Actions

1. **Double Click** to open the interview details
2. Complete any available actions by clicking the **associated** button

Before confirming a request to re-schedule, confirm the time by selecting one of the available interview date and time options

3. Once confirmed, open the confirmation email, and **download** the attached calendar invite to your calendar
4. When an interview is completed, mark it complete by placing a **check in the box** associated with your candidate and select the **Mark Complete** button in the top right-hand corner

Schedule Follow Up Interviews

Once an initial interview has been completed, follow up interviews can be scheduled if desired. To proceed with scheduling a follow up interview, the following steps should be taken from View Interviews (Follow up interviews are not able to be scheduled from View Postings or View Bids):

1. Select **Postings** in the navigation tool on the left
2. Click on **View Interviews**
3. Locate the **candidate(s)** with whom you wish to initiate a follow up interview and **click the box(es)** associated with the line item(s)

*Please ensure that you are selecting the most recent interview number associated with your candidate and posting ID. You will **not** be able to schedule a follow up interview if you do not select the most recent interview number. Also, the bid must be in an interviewing status, and the interview selected must be in an interview completed status*

4. Click on **Schedule Follow-Up**
5. Complete the **Interview Details**

Be sure to include any required information for the interview along with any important meeting instructions such as location, virtual meeting links or a direct phone number to share with the candidate. For further instruction on completing this form, please refer to steps 8-11 in the **Initiating an Interview** section

If desired, you can leave the meeting instructions blank initially. If moving forward with blank meeting instructions, the interview will be considered to have missing details. Those with missing details will be signified by an orange caution symbol found in the second column of the **View Interviews** page. Interviews missing details can be filtered on the **View Interviews** page by selecting the filter option **Missing Details**. If electing to proceed with this option, it will be important to return and add in those details later

6. Click the **Schedule** button

Upon clicking *Schedule*, an automated email request is sent to the Vendor and the status of the bid updates to "Interviewing"

7. Repeat the steps for **Check the Status of Interviews** and **Complete Interview Actions**

8. Repeat the steps for **Schedule Follow Up Interviews** as necessary

Any changes required outside of dotStaff will be handled by the MSP as needed

Bid History

1. Click **Postings** in the navigation tool on the left

2. Select **View Postings**

3. **Locate** the Posting of interest. *Set the date range if needed*

4. **Double click** to open the Posting

5. Click the **Bids** tab

6. Locate the **candidate** for whom you wish to review the Bid History and **double click** the candidate's line item

7. Select **View Bid History** to populate information regarding the status change break down

- The information provided is organized from bottom to top with the most recent status found on the top line

Bid Rejection Reason

1. Click **Postings** in the navigation tool on the left

2. Select **View Postings**

3. **Locate** the Posting of interest. *Set the date range if needed*

4. **Double click** to open the Posting

5. Click the **Bids** tab

6. By default, bids will be set to filter out those bids in a status of Rejected by MSP. To display those hidden bids, select **Show Rejected** button.

7. Locate the **candidate** for whom you wish to review the Bid Rejection Reason and **double click** the candidate's line item

The **Bid Rejection reason** can be found under the Vendor's Bid Information section

Best and Final Offer Request

1. Click **Postings** in the navigation tool on the left

2. Select **View Postings**

3. **Locate** the Posting of interest. *Set the date range if needed*
4. **Double click** to open the Posting
5. Click the **Bids** tab
6. Locate the **candidate**
7. **Check the box for the candidate you wish to request a best and final offer**
8. Click **BAFO request**
9. An email is sent to the vendor requesting a best and final offer and the status of BAFO updates **Requested**
10. Once a best and final offer is submitted by the vendor, the status of BAFO updates to **Submitted**

Accept a Candidate for a Position

Upon selecting a candidate to fill a position, it is necessary for the Client to accept the bid

1. Click **Postings** in the navigation tool on the left
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed*
4. **Double click** to open the Posting
5. Click the **Bids** tab
6. Locate the **candidate**
7. **Check the box for the candidate you wish to select for the position**
8. Click **Accept**
9. Select a **Reason** and provide any applicable **comments**
13. Click **Accept**
14. A success message appears. Click **OK**.

Upon clicking ok, an automated email is sent to the MSP and Vendor and the status of the bid updates to "Engagement Request"

The MSP will contact the Client to discuss the Onboarding Process and next steps

Candidate Status

Bid Statuses

By default, bids will be set to filter out those bids in a status of Rejected by MSP. To display those hidden bids, select Show Rejected button.

Pending MSP Review:

When the Vendor submits a candidate to a posting, the bid status will display Pending MSP Review

Pending Client Review:

When the MSP Team pushes the candidate submission to the Manager's view, the bid status will change to **Pending Client Review**

Engagement Request:

Once the bid is accepted (*candidate selected*), the bid status will change to **Engagement**

Request. The Vendor must login to dotStaff and **Accept** or **Reject** the engagement request **Onboarding:**

After a candidate has accepted the position, and the Vendor has accepted the engagement request, onboarding compliance will begin. The candidate's status will be **Onboarding** until all onboarding compliance is complete.

Cleared:

The MSP Team will verify all onboarding requirements have been completed. At that time, the status will change to **Cleared**. The MSP will let the Manager know and coordinate start date details

Started:

The Resource has entered time and started working on assignment **Rejected:**

The candidate has been rejected and will not be moving forward

Interview Statuses

Interview Requested:

An Interview has been requested by the Client

Interview Confirmed:

An Interview has been confirmed and is scheduled

Interview Reschedule Requested:

An Interview has been requested by the Vendor to be rescheduled by the Client

Interview Declined:

An Interview has been declined by the Vendor

Interview Cancelled:

An Interview has been cancelled and is no longer scheduled

Interview Complete:

An Interview has been completed

Interview Completed – Round #:

A Follow up Interview has been completed, and the round number indicates the number of interviews completed

Rejecting Bids and Closing the Posting

It is necessary to close the Posting when the position has been filled or there is no longer a need to fill the position. All bids on the posting must be rejected and/or in cleared status

1. Click **Postings** in the navigation tool on the left
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed*
4. **Double click** to open the Posting
5. Click the **Bids** tab
6. Place a **check in each box** for those candidates not being selected for the position
7. Click **Reject**
8. Use the dropdown to select a **Reason** for the rejection
9. Provide any **comments** if applicable
10. Click **Reject**
11. You are taken to the Posting tab. Click **Edit**
12. Use the dropdown to select the **Posting Status** of **Position Filled**.

If the position is closing for another reason, select that reason in the dropdown

If a posting is cancelled, there are reasons that the MSP team will select accordingly. You will be able to see these reasons, but they are un-editable

Time and Expense Approval

The Client is responsible for approving time and expense entries. The Client will be sent an invoice for the approved entries.

Client Users can only view, approve, or deny entries for their relevant contractors or Projects. Client Administrators can view, approve, or deny all entries.

Time Approval

A Timesheet in Draft status is not visible to the Client Manager. The timesheet must be submitted for approval in order for the Client Manager to see the entry to approve it.

1. Select **Time/Projects**
2. Click **Approve Time**
*Only timesheets in **Awaiting Approval** status will appear.*
3. Carefully **review** the time entries before choosing to approve or deny:
 - a. Click the **Arrow** be provided with an expanded view of the week, showing individual entries
 - b. For even greater detail, **double click** on the weekly entry to view the Time Summary, Status History, and Approval History
4. **Check the box** associated with the Time Entry to approve or deny
5. If desired, you may **leave a performance rating** for that specified time entry for MSP review
 - a. **Star ratings:** You can leave ratings in increments of full or half star ratings by
 - b. **selecting the star** on the left side for a half rating or the right side for a full rating
 - c. **Feedback box:** This is an additional option to leave further feedback in addition to the star rating (*you must leave a star rating to enable this function*). You can do so by **selecting the comment box** and then typing in your comment
6. Click the **Approve** or **Deny** Button
 - a. **Approve:** Confirm the action by clicking **Yes** in response to the question "Are you sure you want to approve?"
 - b. **Deny:** Select the reason from the dropdown menu. Type any comments (if applicable). Click **Save** to complete the action

The timesheet will drop off the list after being approved or denied

Expense Approval

Expenses approved by the Client are not subject to the dotStaff Fee. Expenses are reimbursed 100% to the Vendor.

1. Select **Time/Projects**
2. Click **Approve Expenses**
*Only Expenses in **Awaiting Approval** status will appear*
3. Carefully **review** the expense entries before choosing to approve or deny:
 - **Double Click** to see further details of the expense and download attachments
4. **Check the box** associated with the Expenses to approve or deny
5. Click the **Approve** or **Deny** button

- a. **Approve:** Confirm the action by clicking **Yes** in response to the question “Are you sure you want to approve?”
- b. **Deny:** Select the reason from the dropdown menu. Type any comments (if applicable). Click **Save** to complete the action

The Expense will drop off the list after being approved or denied

Approve or Deny Milestones

The Client is responsible for approving time and expense entries. The Client will be sent an invoice for the approved entries.

1. Navigate to **Time\Project > Approve Milestones**.
2. Carefully review the entries with a status of Awaiting Approval.
 - a. Click the **“Arrow”** button to expand an entry to view the Date, Resource, Vendor, Milestone, and the Amount.
 - b. Access greater detail by **double clicking** on the expanded line entry.
 - c. Make certain to note those which should not be approved as action must be taken on these entries as well.
3. **Select the check box** associated with the entry to approve or deny.
4. Click the **“Approve”** or **“Deny”** button on the action bar.
 - a. If **Approving**, *the Milestone will drop off the list after being approved.*
 - b. If **Denying**, select the reason from the Reason dropdown menu. If none of the reasons apply, select **“Other”** and type the reason in the Comments box. Click the **Save** button to complete the action. *The Milestone will drop off the list after being denied.*

Invoicing

An invoice, also called a bill, is a document charging the client for services provided. The invoice lists all the information and details about the transaction, including:

- The quantity of services provided
- The rate charged
- The total cost
- A description of the transaction
- When and how the client should pay

Invoice Recipient

An invoice recipient is the individual(s) working for the client who receives the invoice. The recipient is responsible for ensuring a payment is made to Knowledge Services for the work performed for the client.

The invoice recipient(s) contact information needs to be provided to the MSP before the first invoice cycle runs. The information must be provided to the MSP Team no later than 10am on the day invoicing is scheduled or the invoice will not be sent until the following invoicing cycle. If the invoice recipient(s) contact information needs to be updated, please contact the MSP.

Sending the Invoice

Invoicing occurs on a weekly, bi-weekly, or monthly basis. The frequency of invoicing is determined by the client. An auto-generated invoice will be created for any Time, Expense, or Milestone entry (*not*

including the current week) that has moved to “Approved” status before 4:00pm EST on the invoicing date. The invoice is sent from dotStaff by Knowledge Services via email to the invoice recipient(s).

Separate invoices are sent for Time, Expense, Milestone, and Direct Hire. This means a resource could enter a timesheet and an expense in the same week and the client will receive two separate invoices - one for the timesheet and one for the expense.

Knowledge Services can choose to delay invoicing if necessary and will communicate any delays in invoicing via the Product News Page in dotStaff.

Anatomy of an Invoice

Invoices are broken into three sections. It is important that you review each section.

1. Cover Page

- The cover page is the first page of the invoice and is a high-level overview outlining what the client is being billed for
- Separate invoices will always be sent for Time, Expense, Milestone, or Direct Hire

2. Summary

- The Summary Page(s), *if applicable*, show all charges broken out by the categories listed below
 - i. Cost Center: total charges per cost center
 - ii. Manager: total charges per manager
 - iii. Company: total charges per vendor company
 - iv. Resource: total charge per resource

3. Detail

- The Detail Page(s) provides additional information about all charges and can be used to review specific information as necessary

View Invoices

If you have deleted or misplaced the invoice email sent from Knowledge Services, utilize **View Time**, **View Expenses**, or **View Milestones** portal in dotStaff to locate the invoice number. Once you identify the invoice number, reach out to your Managed Service Provider for a copy of the Invoice.

Invoice Statuses

The status of a Timesheet, Expense, or Milestone entry will indicate what phase of the billing cycle the entry is in. All entry statuses are available in dotStaff in the View Time, View Expenses, and View Milestones portals. Invoicing statuses are listed below:

1. **Draft:** The time entry has been saved as a draft
 - a. Clients cannot see time in draft status to approve
 - b. Expenses and Milestones cannot be saved as draft
2. **Awaiting Approval:** The Time, Expense, or Milestone entry has been submitted to the client for approval
3. **Denied:** The Time, Expense, or Milestone entry has been denied by the client
4. **Approved:** The Time, Expense, or Milestone entry has been approved by the client
5. **Invoiced:** An invoice has been sent to the client for payment
6. **Paid:** Knowledge Services has received payment from the client
7. **Complete:** Knowledge Services has remitted the payment minus any fees to the vendor

Resource Contract Renewal

You may have access to the Resource Contract Renewal page. This page is intended to enable data collection for PO updates nearing their end dates in addition to other details as needed to comply with necessary information to continue a candidate's employment. An email will be received notifying of upcoming expiring contracts

1. Select **Records Management**
2. Click Resource Contract Renewal
3. Locate the candidate of interest and select the Renewal Form button
Candidates are displayed in a list starting with the oldest contract at the top. To further filter results, click on the search button in the upper right hand corner, if desired
4. You will be redirected to the dotStaff forms website. Complete the fields for the form 5. Once finished, hit Submit