knowledge services

Vendor Get Started Guide

Contents

Activate your Account

To activate your account, your company Administrator 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 additional 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
    a. *If password is unknown, follow the **Reset Password** steps*

For further assistance, contact the Support Team at Knowledge Services

Reset Password

1. From the login screen, click the **Forgot Password?** hyperlink
2. Enter your **Username**
    a. *If username is unknown, click the **Forgot Username?** hyperlink*
3. **Select** a reset option:
    a. **Reset via SMS**: A text will be sent to the SMS phone number on file
    b. **Reset via Email**: An email is sent with a link
    When resetting your password, be sure to select the VMS link
4. **Click the link** in the email or SMS text received
5. **Answer** your security question
6. Click **Reset Password**
7. Type a **New Password**
8. Repeat Password
9. Click **Reset Password**

For further assistance, contact the Support Team at Knowledge Services

Tenant Access

You may have access to multiple tenants (separate databases of information). If this is the case, you will need to ensure that the correct tenant has been selected before you view and perform actions in the system

Once logged in, you will see the name of tenant you are logged into in the upper right corner after the Welcome to dotStaff message. By default, you will start out on the Commercial tenant

1. If switching tenants is required, select the **gear icon** in the upper right corner of the screen
2. Select **Change Tenant**. *This will display a pop-up box*
3. Select from the **drop down** the tenant of desire
4. Click the **OK** button

Add a New User or Resource

A Vendor Administrator may add a dotStaff User or Resource. A Vendor User may only add a dotStaff resource. A Vendor User might be a Recruiter, an Account Representative, or an Accounts Receivable Representative

If someone needs access to multiple or a certain tenant, a Vendor Administrator of the specific tenant will need to add the individual

Create a New Account

1. Navigate to **Records Management**
2. Select **View Users**
3. Click the **Add** button
4. Select the correct **Account Type**
    a. If you are a Vendor Administrator, you can select User or Resource
    b. If you are a Vendor User, you will only be able to select Resource
5. Complete the **Account Information** fields
    a. All fields are required except Username on this screen

    Pro Tip: It is recommended that you do create a username for the user on this page as it is a required field on the next page

    b. The **email entered** is where the account activation email containing the User's activation link will be sent
6. Click the **right orange arrow** to move to the next page
7. Click the **Send Activation Notification** box if desired
    a. If selected, the user will receive an email notification requesting activation of their account in dotStaff
    b. If unselected, the user will not receive an activation email
        i. If unselected, you may re-send the account activation notification later
        ii. See below for instructions on **Resend Account Activation Notification**
8. Verify the User Information is correct. Click **Complete**

9. *A pop-up box appears asking if you want to save.* Click **OK**

Adding a Vendor User to Additional Tenants

If it is required for a Vendor User to access multiple tenants, a Vendor Administrator must add them as a Vendor User for each tenant required

Before beginning these steps, you must confirm you are in the correct tenant

1. Navigate to **Records Management**
2. Select **View Users**
3. Click the **Add** button
4. Select the **User** option
5. Type in the **name** of the Vendor User previously created. *The account of the user will display below in the search results*
6. Click the **circle** next to the individual's name
7. Click the **right orange arrow** to move to the next page
8. Click the **Send Activation Notification** box, if desired (*The Send Activation Notification will be unavailable to users who have previously activated their account)*
9. If selected, the user will receive an email notification requesting activation of their account in dotStaff
10. If unselected, the user will not receive an activation email
    a. If unselected, you may re-send the account activation notification later
    b. See below for instructions on Resend Account Activation Notification
11. Click **Complete**
12. A pop-up box appears asking if you want to save. Click **OK**

Confirm, Review, and Edit an Account

After creating a new account, the User List will appear with the newly added user included

1. Navigate to **Records Management**
2. Select **View Users**
3. Locate the **User** of interest
4. **Double click** on the correct line item to open the account and edit the account details
5. Click the **Edit** button and update the necessary information
6. Click **Save**

Adding the Unique ID (SSN) to an Existing Resource Account

If a partial Social Security Number has not previously been entered for the existing user, enter the Resource's partial Social Security Number based on the program specific requirements following the steps below.

1. Log into dotStaff™ as the Vendor Administrator or Vendor User

2. Navigate to Records Management > View Users
3. Locate the Resource's line item, and double click
4. On the About tab, click Edit
5. Enter the Resource’s partial SSN based on the program specific requirements
    - For example, it may be required to provide the full SSN or last 5 digits of the SSN
    - If a portion of the SSN is required, the entry would look like the following: 111-1X-XXXX
6. Enter your company’s phone number in the cell field
7. Click Save

Assign Candidate Profile Editing Rights

The following steps should only be taken by the Vendor Administrator. The Vendor Administrator must assign permission for any other user to edit the candidate profile

1. Navigate to **Company Settings**
2. Select **Resume Preferences**
3. **Check the box** next to the users who need to be assigned resume editing rights 4. Click **Save**

Reviewing Postings

1. Select **Opportunity Management** from the navigation tool in the upper left-hand corner
2. Click **View Postings**
3. **Locate the Posting** you wish to view
4. **Double click** on the line item to open and thoroughly review the Posting details

Submitting a Candidate

There are multiple position types. Follow the steps below for the type of posting you are submitting a candidate

Staff Augmentation

1. Select **Opportunity Management** from the navigation tool in the upper left-hand corner
2. Click **View Postings**
3. Locate the **Posting** you wish to submit the candidate
4. Double click on the **line item** to open the Posting
5. Click **Add Bid** in the upper right-hand corner
   After clicking Add Bid, it will move you into creating or confirming the user account for submission
6. Complete the **Account Information** fields

Reminder: One account is permitted per resource. Creating a new account for a resource who already has an account will result in an error.

All fields are required except Username on this screen. This will search for ***existing users. If a user exists, results will populate in the Search Results below. If results do not populate, this means a user does not exist, and you will be moving forward with creating a new user***

Pro Tip: It is recommended that you do create a username for a new user on this page as it is a required field on the next page

7. **If an existing user appears, click the circle associated with the resource with whom you wish to submit.** ***If results do not appear, skip this step***
8. Click the **right orange arrow** to move to the next page
    a. If a Unique ID (SSN) has not previously been entered for the existing user, enter the Resource's SSN based on the program specific requirements.
    For example:
        - It may be required to provide the full SSN or last 5 digits of the SSN
        - If a portion of the SSN is required, the entry would look like the following: 111-1X-XXXX

    b. If the Social Security Number box is not appearing***, skip this step***
9. Click the **Send Activation Notification** box, if desired
    a. If selected, the User will receive an email notification requesting activation of their account in dotStaff. *The* ***email entered*** *previously is where the account activation email containing the User's activation link will be sent. You will not be able to do this step if the account has been previously activated*
    b. If unselected, the user will not receive an activation email
        i. If unselected, you may re-send the account activation notification later
        ii. See below for instructions on **Resend Account Activation Notification**
10. Verify the User Information is correct. If so, click the **orange arrow** on the right
11. If documents are required, Identify the File Category
    a. **Resume** – candidate's resume
    b. **Other** – any other documents
12. Click **Select**
13. Locate the desired file on your computer
    Repeat steps 11-13 for as many documents desired
14. When all files have been specified, click **Upload**
15. Newly uploaded files will appear under Currently Attached Files. *If the resource was an existing user, it will also display documents previously uploaded*
16. After documents have been uploaded, it is important to identify which documents should be included with your bid submission. To do so, you will want to place a **checkmark** in any document from the **Currently Attached Files list**. *Any document that was newly uploaded will already be checked, and will not have the option to unselect*
17. Click the **orange arrow** on the right

If opting to not include attachments, a confirmation will appear. Click OK to continue with not uploading files

18. Enter the **Bill Rate** in the Rate Field
    This is the amount of dollars the Client will be billed per hour/unit
19. Type any **Comments** if desired. *The comments are visible to the MSP and Client*
20. Click the **orange arrow** on the right
21. **Verify** the information for the bid is correct
22. If correct, click **Submit Bid**
    Once clicked, you are redirected to the ***Bids*** *tab where your successfully submitted candidate will be listed*

Markup

1. Select **Opportunity Management** from the navigation tool in the upper left-hand corner
2. Click **View Postings**
3. **Locate the Posting** you wish to submit the candidate
4. **Double click** on the line item to open the Posting
5. Click **Add Bid** in the upper right-hand corner
   After you click Add Bid, it will move you into creating or confirming the user account you will be submitting
6. Complete the **Account Information** fields

Reminder: <u>One</u> account is permitted per resource. Creating a new account for a resource who already has an account will result in an error.

All fields are required except Username on this screen. This will search for ***existing users. If a user exists, results will populate in the Search Results below. If results do not populate, this means a user does not exist, and you will be moving forward with creating a new user***

Pro Tip: It is recommended that you do create a username for a new user on this page as it is a required field on the next page

7. **If an existing user appears, click the circle associated with the resource with whom you wish to submit. If results did not appear, skip this step**
8. Click the **right orange arrow** to move to the next page
   a. If a Unique ID (SSN) has not previously been entered for the existing user, enter the Resource's SSN based on the program specific requirements.
      For example:
      - It may be required to provide the full SSN or last 5 digits of the SSN
      - If a portion of the SSN is required, the entry would look like the following: 111-1X-XXXX
   b. If the Social Security Number box is not appearing**, *skip this step***
9. Click the **Send Activation Notification** box, if desired

   a. If selected, the User will receive an email notification requesting activation of their account in dotStaff. *The **email entered** previously is where the account activation email containing the User's activation link will be sent. You will not be able to do this step if the account has been previously activated*
   b. If unselected, the user will not receive an activation email
      i. If unselected, you may re-send the account activation notification later
      ii. See below for instructions on **Resend Account Activation Notification**
10. Verify the User Information is correct. If so, click the **orange arrow** on the right
11. If documents are required, Identify the File Category
    a. **Resume** – candidate's resume
    b. **Other** – any other documents
12. Click **Select**
13. Locate the desired file on your computer

    Repeat steps 11-13 for as many documents desired
14. When all files have been specified, click **Upload**
15. Newly uploaded files will appear under Currently Attached Files. *If the resource was an existing user, it will also display documents previously uploaded*
16. After documents have been uploaded, it is important to identify which documents should be included with your bid submission. To do so, you will want to place a **checkmark** in any document from the **Currently Attached Files list**. *Any document that was newly uploaded will already be checked, and will not have the option to unselect*
17. Click the **orange arrow** on the right

    If opting to not include attachments, a confirmation will appear. Click OK to continue with not uploading files
18. Enter the **Pay Rate.** *This is the amount the contractor will be paid per hour/unit*
19. Enter the **Markup Percentage**. Not to exceed the Max Markup Percentage listed
20. The **Bill Rate** will auto-populate after entering the Pay Rate and Markup Percentage
21. Type any **Comments**, if desired. *The comments are visible to the MSP and Client*
22. Click the **orange arrow** on the right
23. **Verify** the information for the bid is correct
24. If correct, click **Submit Bid**

    *Once clicked, you are redirected to the **Bids** tab where your successfully submitted candidate will be listed*

Contract to Hire

1. Select **Opportunity Management** from the navigation tool in the upper left-hand corner
2. Click **View Postings**
3. **Locate the Posting** you wish to submit the candidate
4. **Double click** on the line item to open the Posting
5. Click **Add Bid** in the upper right-hand corner

After you click Add Bid, it will move you into creating or confirming the user account you will be submitting

6. Complete the **Account Information** fields

Reminder: One account is permitted per resource. Creating a new account for a resource who already has an account will result in an error.

*All fields are required except Username on this screen. This will search for **existing users. If a user exists, results will populate in the Search Results below. If results do not populate, this means a user does not exist, and you will be moving forward with creating a new user***

Pro Tip: It is recommended that you do create a username for a new user on this page as it is a required field on the next page

7. **If an existing user appears, click the circle associated with the resource with whom you wish to submit. If results did not appear, skip this step**
8. Click the **right orange arrow** to move to the next page
    a. If a Unique ID (SSN) has not previously been entered for the existing user, enter the Resource's SSN based on the program specific requirements.
    For example:
        - It may be required to provide the full SSN or last 5 digits of the SSN
        - If a portion of the SSN is required, the entry would look like the following: 111-1X-XXXX

    b. If the Social Security Number box is not appearing***, skip this step***
9. Click the **Send Activation Notification** box, if desired
    a. If selected, the User will receive an email notification requesting activation of their account in dotStaff. *The **email entered** previously is where the account activation email containing the User's activation link will be sent. You will not be able to do this step if the account has been previously activated*
    b. If unselected, the user will not receive an activation email
        i. If unselected, you may re-send the account activation notification later
        ii. See below for instructions on **Resend Account Activation Notification**
10. Verify the User Information is correct. If so, click the **orange arrow** on the right
11. If documents are required, Identify the File Category
    a. **Resume** – candidate's resume
    b. **Other** – any other documents
12. Click **Select**
13. Locate the desired file on your computer
    Repeat steps 11-13 for as many documents desired
14. When all files have been specified, click **Upload**
15. Newly uploaded files will appear under Currently Attached Files. *If the resource was an existing user, it will also display documents previously uploaded*

16. After documents have been uploaded, it is important to identify which documents should be included with your bid submission. To do so, you will want to place a **checkmark** in any document from the **Currently Attached Files list**. *Any document that was newly uploaded will already be checked, and will not have the option to unselect*
17. Click the **orange arrow** on the right

    If opting to not include attachments, a confirmation will appear. Click OK to continue with not uploading files
18. Enter the bill rate in the **Hourly Rate** Field
19. Enter the expected salary in the **Salary** field
20. Select **Percentage** or **Flat Fee** for the commission type:
    a. Select **Percentage** to have the commission amount applied against the candidate's salary and invoiced to the Client
    b. Select **Flat Fee** to have the commission amount invoiced to the Client

       The dotStaff fee will be deducted from either the percentage or flat fee amount
21. Enter the commission amount in the **Percentage/Fee** field. *Do not include % or $ symbols*
22. Type any **Comments** if desired. *The comments are visible to the MSP and Client*
23. Click **the orange arrow on the right**
24. **Verify** the information for the bid is correct
25. If correct, click **Submit Bid**

    *You will be redirected to the **Bids** tab where your successfully submitted candidate will be listed*

Direct Hire

1. Select **Opportunity Management** from the navigation tool in the upper left-hand corner
2. Click **View Postings**
3. **Locate the Posting** you wish to submit the candidate
4. **Double click** on the line item to open the Posting
5. Click **Add Bid** in the upper right-hand corner

   After you click Add Bid, it will move you into creating or confirming the user account you will be submitting
6. Complete the **Account Information** fields

Reminder: One account is permitted per resource. Creating a new account for a resource who already has an account will result in an error.

*All fields are required except Username on this screen. This will search for **existing users. If a user exists, results will populate in the Search Results below. If results do not populate, this means a user does not exist, and you will be moving forward with creating a new user***

Pro Tip: It is recommended that you do create a username for a new user on this page as it is a required field on the next page

7. **If an existing user appears, click the circle associated with the resource with whom you wish to submit. If results did not appear, skip this step**
8. Click the **right orange arrow** to move to the next page
    a. If a Unique ID (SSN) has not previously been entered for the existing user, enter the Resource's SSN based on the program specific requirements.
    For example:
        - It may be required to provide the full SSN or last 5 digits of the SSN
        - If a portion of the SSN is required, the entry would look like the following: 111-1X-XXXX

    b. If the Social Security Number box is not appearing***, skip this step***
9. Click the **Send Activation Notification** box, if desired
    a. If selected, the User will receive an email notification requesting activation of their account in dotStaff. *The **email entered** previously is where the account activation email containing the User's activation link will be sent. You will not be able to do this step if the account has been previously activated*
    b. If unselected, the user will not receive an activation email
        i. If unselected, you may re-send the account activation notification later
        ii. See below for instructions on **Resend Account Activation Notification**
10. Verify the User Information is correct. If so, click the **orange arrow** on the right
11. If documents are required, Identify the File Category
    a. **Resume** – candidate's resume
    b. **Other** – any other documents
12. Click **Select**
13. Locate the desired file on your computer
    Repeat steps 11-13 for as many documents desired
14. When all files have been specified, click **Upload**
15. Newly uploaded files will appear under Currently Attached Files. *If the resource was an existing user, it will also display documents previously uploaded*
16. After documents have been uploaded, it is important to identify which documents should be included with your bid submission. To do so, you will want to place a **checkmark** in any document from the **Currently Attached Files list**. *Any document that was newly uploaded will already be checked, and will not have the option to unselect*
17. Click the **orange arrow** on the right
    If opting to not include attachments, a confirmation will appear. Click OK to continue with not uploading files
18. Enter the expected salary in the **Salary** field
19. Select **Percentage** or **Flat Fee** for the commission type:
    a. Select **Percentage** to have the commission amount applied against the candidate's salary and invoiced to the Client

b. Select **Flat Fee** to have the commission amount invoiced to the Client
The dotStaff fee will be deducted from either the percentage or flat fee amount

20. Enter the commission amount in the **Percentage/Fee** field. *Do not include % or $ symbols*
21. Type any **Comments** if desired. *The comments are visible to the MSP and Client*
22. Click the **orange arrow** on the right
23. **Verify** the information for the bid is correct
    a. If correct, click **Submit Bid**
    *You will be redirected to the **Bids** tab where your successfully submitted candidate will be listed*

Build a Candidate Profile

The Vendor must first create a dotStaff account for the candidate. Separate instructions are available in the section titled **"Add a New User or Resource."** The Vendor Administrator for the Vendor Company must assign editing rights for all Vendor Users who wish to build a candidate Profile. Separate instructions are available in the section titled **"Assign Candidate Profile Editing Rights"**

Parse/Process a Resume File

You may do this step for a Resource who has data prefilled in, if desired, however, it will only retain the most recent information. This will cause previous information to be overwritten, but if information was previously filled in by Processing a Resume initially, the document will remain in the Attachments section

1. Navigate to **Records Management**
2. Select **View Users**
3. Locate the **Resource's line item**, and double click
4. Select the **Professional** tab
5. Click the **Edit** button
6. Click on **Process Resume**
7. Select **Browse** to find the resume on your computer
8. Click **Process Resume**
9. Wait for the screen to refresh
    a. Once the system processes the file content, information will be displayed in the various resume fields
    b. The parsed resume will automatically be attached to the profile and be displayed in the **Attachments** section
10. Click **Save**

Describe Candidate Objectives

In the **Resume Overview** section, complete the fields including Career Objective, Comments, Career Level, and Desired Position Type

Add Skills

1. Click the **green plus sign** to open the **Skills** area
2. Mark each relevant skills category
3. Click the **Next** button
4. Select the button for **Listed** or **Non-Listed** to filter for the desired Skill Type
    a. In **Listed Skill Type**, the Skills Master List displays subcategories and skills within each category selected on the previous screen
    b. In **Non-Listed Skill Type**, drop-down lists are provided for a category and a subcategory as well as an area to name the non-listed skill being added
5. After checking the Category, Subcategory, and Skill for a Listed Skill, or providing a name for a Non-Listed skill, click the **down arrow** to add the skill
    - Your screen will refresh
6. Use the dropdowns available in each column under the **Added Skills** section to add additional details to each selected skill, including:
    a. Years of experience
    b. Career level
    c. When the skill was last used
    d. If the skill is required or desired
7. Scroll up and click **Save** in the upper right-hand corner

Specify Experience

1. Click the **green plus sign** to open the **Experience** area
2. Identify the **Company** at which the experience was gained
3. Include the **Job Title** held at the time of the experience
4. Define the length of the engagement using the **Start** and **End** fields
5. In the **Key Sills Used** and **Roles and Responsibilities** fields, type any relevant information
6. Repeat steps 1-5 to add additional work experience to the resume
7. Click **Save**

List Education

1. Click the **green plus sign** to open the **Education** area
2. Enter the name of the school attended in the **School Name** field
3. From the **Degree** dropdown, select the type of degree earned
4. Identify the focus of study in the **Major/Minor** field
5. Enter the school's location using the **City, State,** and **Country** fields
6. Repeat steps 1-5 to add additional degrees or schools to the resume
7. Click **Save**

Add Relevant Certifications

1. Click the **green plus sign** to open the **Certifications** area
2. Identify the certifying organization
3. Enter the **Title** of the certification
4. Use the **calendar icon** to specify the **date** on which the certification was attained
5. Repeat steps 1-4 to add additional certifications to the resume
6. Click **Save**

Provide References

1. Click the **green plus sign** to open the **References** area
2. In the **Name** field, enter the name of the reference
3. In the **Title** field, add the reference's professional job title
4. Add a current **phone number** for the reference in the **Phone** field
5. Repeat steps 1-4 to add additional references to the resume
6. Click **Save**

Attach Files

1. Navigate to **Records Management**
2. Select **View Users**
3. **Double click** on the line item for the correct resource
4. Select the **Professional** tab at the top
5. Click the **Edit** button
6. Click the **green plus sign** to open the **Attachments** area
7. Select from the drop down the correct posting to map your documents
   *If document should not be mapped to a posting or if you have not yet submitted your resource to a posting, select N/A. If looking to map documents to a posting after the fact, please see **Mapping Attachments Already Uploaded** below*
8. Identify the File Category
   a. **Resume** – candidate's resume
   b. **Other** – any other documents
9. Click **Select**
10. Locate the desired file on your computer
    Repeat steps 7-10 for as many documents desired
11. When all files have been specified, click **Upload**
12. Newly uploaded files will appear under Currently Attached Files. *If the resource was an existing user, it will also display documents previously uploaded*
13. Click **Save**
14. Click **Save** again

Mapping Attachments Already Uploaded

1. Navigate to **Records Management**
2. Select **View Users**
3. **Double click** on the line item for the correct resource
4. Select the **Professional** tab at the top
5. Click the **Edit** button
6. Click the **green plus sign** to open the **Attachments** area
7. Select from the drop down the correct posting to map your documents
8. Scroll to **Currently Attached Files** and place a **checkmark** in any document(s) desired
9. Click **Save**
10. Click **Save** again

Unmapping Attachments

1. Navigate to **Records Management**
2. Select **View Users**
3. **Double click** on the line item for the correct resource
4. Select the **Professional** tab at the top
5. Click the **Edit** button
6. Click the **green plus sign** to open the **Attachments** area
7. Select from the drop down the posting you wish to un-map your documents
8. Scroll to **Currently Attached Files** and **uncheck** in any document(s) desired
9. Click **Save**
10. Click **Save** again

Delete Files

1. Navigate to **Records Management**
2. Select **View Users**
3. **Double click** on the line item for the correct resource
4. Select the **Professional** tab at the top
5. Click the **Edit** button
6. Click the **green plus sign** to open the **Attachments** area
7. Select from the drop down the correct posting or N/A
8. Scroll to **Currently Attached Files** and place a **checkmark** in any document(s) desired
9. Select the **Permanently Delete Selected Files** button

   *It is not required to delete documents unless you wish to do so. If looking to not have a document associated with a posting, please see steps for **Unmapping Attachments** above*

10. Click **Save**
11. Click **Save** again

Attaching Documents to a Candidate Profile

Many programs require specific compliance documents including drug or background screenings, certifications, and references. Compliance documents may be attached to a resource's profile after the resource has been submitted into dotStaff and is cleared to work. Be sure to only create one dotStaff account per user/resource and avoid uploading compliance documents to the wrong account

Check with your MSP to verify your specific compliance requirements and to determine at what point the documents need to be submitted in dotStaff. Follow the steps below to attach a document to a resource's profile

1. Navigate to **Records Management**
2. Select **View Users**
3. Use the filters to locate the correct resource profile. *Set the date range accordingly*
4. **Double click** on the appropriate resource
5. Click on the **Professional** tab at the top
6. Select the **Edit** button at the top of the window
7. Scroll to the bottom and click on the **green plus sign** in the Attachments area
8. Select from the drop down the correct posting to map your documents
9. Identify the File Category
    a. **Resume** – candidate's resume
    b. **Other** – any other documents
10. Click **Select**
11. Locate the desired file on your computer
    Repeat steps 8-11 for as many documents desired
12. When all files have been specified, click **Upload**
13. Newly uploaded files will appear under Currently Attached Files. *If the resource was an existing user, it will also display documents previously uploaded*
14. Click **Save**
15. Click **Save** again

Modify a Bid

After a bid has been submitted, it can be modified or withdrawn. Follow these steps to modify or withdraw the bid
Note: If a bid is withdrawn, the bid still counts against the maximum allowed bid submittals per vendor per posting

1. Navigate to **Opportunity Management**
2. Select **View Postings**
3. Locate the correct posting associated with the bid

4. **Double click** on the posting line item
5. Click the **Bids** button
6. **Locate the Resource** whose bid you wish to modify or withdraw
7. **Double click** on the line item to open the resource's bid
8. On the Bid Information page, edit the bid as is needed
9. Click **Submit** or **Withdraw**
10. A popup box appears asking you to confirm. Click **OK**

Candidate Status

Bid Statuses

Pending MSP Review:

When the Vendor submits a candidate to a posting, the bid status will automatically read 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 the 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

Interviews

After the period to submit bids to a posting has closed, the client will request an interview with the candidate(s). If the candidate you submit is selected for an interview, you will receive an email notification from dotStaff. If an attachment is included on the interview request, it will be indicated by this email. Review the interview email request information and reach out to the candidate to coordinate the interview. It is the vendor's responsibility to relay the interview information to the candidate

Accept Interview

1. Select **Opportunity Management** from the navigation bar
2. Click on **Approve Interviews**
3. **Double click** on the requested interview to review the 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. Select the button next to the date/time
5. Provide the **Candidate Number** and/or **Candidate Email** for your candidate *if applicable The **Candidate Number** and **Email** is for the Client to see, and not for automatic emails to be sent about information regarding the interview*
6. Click **Accept Interview**
7. A message appears asking if you wish to proceed. Click **Yes**
   Upon clicking Yes, an email is sent to the client informing them the interview has been confirmed. You will also receive an email with a calendar invite containing the interview details

   *If an interview is accepted but has no meeting link, when one is added after accepting, a **Notification Email** will be sent with details that show the posting title, the steps to get there, and what was added or missing. It will also include an updated calendar invite*

Decline Interview

1. Select **Opportunity Management** from the navigation bar
2. Click on **Approve Interviews**
3. **Double click** on the requested interview to review the 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 **Decline Interview**
5. Use the dropdown to select the **Reason** for declining the interview request
6. Click **Save**

   Upon clicking Save, an email is sent to the client informing them the interview has been declined

Adding Attachments

1. Select **Opportunity Management** from the navigation bar
2. Click on **Approve Interviews**
3. **Double click** on the Requested Interview to review the 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 **Browse**
5. Select your attachment and upload

Propose New Time for the Interview

1. Select **Opportunity Management** from the navigation bar
2. Click on **Approve Interviews**
3. **Double click** on the Requested or the Confirmed Interview to review the 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 client informing them the interview has been requested to be rescheduled and can take action to confirm/decline the request

   If the interview is accepted by the client, you will receive an email with a calendar invite containing the interview details

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 ***Approve Interviews*** *page by* *selecting the filter option **Missing Details**. Once the client modifies the interview to include the missing details, you will be sent an email with an updated calendar invite. **Please pay special attention to note all information in the new calendar invite***

Important to Note:** The client can edit an interview when the interview status is Interview Requested, Interview Reschedule Requested, and Interview Confirmed. They can adjust meeting URL, meeting instructions, and **time zone.** If the time zone is altered in an Interview Confirmed status, it will **not** change status. If an edit is made, you will receive an email with updated information. **Please pay special attention to note all information in the new calendar invite

Best and Final Offer Submittal

An email is generated once the Client or MSP requests a best and final offer. Follow these steps to submit the best and final offer

1. Select **Opportunity Management** > **View Bids**
2. Locate the Bid you wish to submit a best and final offer
3. **Double click** to open the bid
4. Enter the best and final offer amount in the **BAFO Rate** column (right-hand corner)
5. Click **Submit Best Offer** (upper right-hand corner)
6. A success message appears. Click **OK**
7. An email is generated to the Client and MSP indicating the offer amount

Engagement Request

Once the bid has been accepted *(candidate selected)*, the bid status will change to **Engagement Request.** The Vendor must **Accept** or **Reject** the request in dotStaff

1. Select **Opportunity Management**
2. Click **View Bids**
3. Locate the Bid that needs to be accepted or rejected. **Check the box** for that bid
4. Click **Accept** or **Reject**
    a. If **Reject** is selected, a reason must also be selected
    b. Select applicable reason from drop down
    c. Click **Reject** to confirm selection

Onboarding

Onboarding tasks are used as a checklist to validate all documents, licenses, and steps have been completed before a Resource starts working

Once a candidate is selected for a position and moves to **Onboarding Status**, the Vendor and MSP work back and forth until all tasks are checked off

1. Select **View Bids** from the navigation tool
2. Locate the **Candidate's** bid. *Set the date range as necessary*

3. **Double click** to open
4. Click **Edit**
5. Under the Onboarding Category section, place a **check** in the box for the item that is completed
6. Provide an **expiration date** *(if applicable)*
7. Click the **paperclip icon** to upload an attachment *(if applicable)*

Follow steps 6-8 to mark any additional tasks complete

8. Click **Save**

Once all tasks have been checked off by the Vendor and MSP, the contract is created and the status updates to **Cleared**

Resend Account Activation Notification

To activate a new account, a user or resource must have an activation code. The activation code is emailed when an account is created or manually resent. Both Vendor Administrators and Vendor Users can resend the Account Activation Email containing the Activation code

1. Navigate to **Records Management**
2. Select **View Users**
3. Use the filters to locate the resource who will receive the account activation notification and code. *Set the date range if necessary*
4. **Check the box** beside the name of the resource
5. Click **Resend**
   - If you initially opted out of sending the activation email in account setup, this will also serve to send out the initial invitation
6. A popup message will appear stating the **"Activation email was successfully resent".** Click **OK**

Time Entry

A vendor has the ability to enter time on behalf of any resource working for their company that has a contract and project in dotStaff

1. Navigate to **Time/Projects**
2. Select **Add Time**
3. Use the **Calendar Icon** to select the week you wish to enter time for
4. Use the dropdown to select the **Resource** you wish to enter time for
5. Use the dropdown to select the **Contract** you wish to enter time for
6. Use the dropdown to select the **Project** you wish to enter time for
   If the field is unavailable, the resource is not tied to a Project. Contact the Managed Service Provider for further assistance
7. Use the dropdown to select the **Category**

8. Type any **Comments** *(if applicable)*
9. Enter **Time In**. *This is the time the resource started working*
10. Enter **Break Out** *(if applicable). This is the time the resource left to go on a break* 11. Enter **Break In** *(if applicable)*

    This is the time the resource came back from break and began to work again

12. Enter **Time Out**

    This is the time the resource stopped working. Pay close attention to AM and PM on the timesheet. Make sure the total hours worked each day calculate properly

13. After all the time is entered, click **Submit for Approval**.

    If you save the time in draft status, the Manager is unable to see the timesheet to approve

Once submitted, the status reads **"Awaiting Approval,"** and has been sent to the Manager for approval

View Time

1. Navigate to **Time/Projects**
2. Select **View Time**
3. Use the filter to **locate the correct timesheet** you wish to view
4. Expand a specific timesheet to view more details
    a. Click the **black arrow** next to the timesheet to view the individual time entries for the entire week
    b. For even great detail, **double click** on the weekly entry to view the Duration, Status History, and Approval History
    c. Use the **View Rate sheet** button to see rate types and rate amounts associated with each category type including Regular, Shift, OT, Shift + OT
5. Click **Export** to create a copy of the displayed results

Expense Entry

The Managed Service Provider must assign a resource as an **Expense Submitter** first. Please reach out to the MSP Team for assistance if needed

1. Navigate to **Time/Projects**
2. Select **Add Expense**
3. Use the **Calendar Icon** to select the day of the expense
4. Use the dropdown to select the **Resource** you wish to enter an expense for
5. Use the dropdown to select the **Project** you wish to enter an expense for
6. Use the dropdown to select the **Project Category** for the expense *This is the type of expense*
7. Type a **Description** *(if applicable)*
8. Click **Browse** to upload any attachments

Use the **Expense Items** section to itemize the expense and provide the amount of each expense

9. Select the **Date** of the expense
10. Use the dropdown to select the **Type** of expense
11. Type the **Amount** of the expense
12. Click **Browse** to upload any attachments

Continue adding additional expense items by clicking **Add Expense** and following steps 10-13

13. Click **Submit for Approval**
14. A success message appears. Click **OK**

View Expenses

1. Navigate to **Time/Projects**
2. Select **View Expenses**
3. Use the filter to **locate the correct expense** you wish to view
4. **Double click** on the line item to view the details of the expense
5. Click **Edit** to make any necessary changes

Disputing Time

A time entry that has been entered incorrectly and moved to the status of **Invoiced**, **Paid**, or **Complete**, must be disputed before any changes can be made. *If in **approved** status, reach out to the Managed Service Provider for assistance in getting corrections made*

1. Navigate to **Time/Projects**
2. Select **View Time**
3. Use the filter to **locate the timesheet** you wish to dispute
4. Place a **check in the box** for that timesheet
5. Click **Mark Disputed**
6. A box will appear. Use the dropdown to select the **Reason** for disputing the time entry
7. Type any **Comments** if desired
8. Click **Save**

Contact the Managed Service Provider to inform them of the dispute. Once they accept the dispute, the time entry will be credited, and a new entry can be submitted

Disputing an Expense

An expense entry that has been entered incorrectly and moved to the status of **Invoiced**, **Paid**, or **Complete**, must be disputed before any changes can be made

1. Navigate to **Time/Projects**
2. Select **View Expenses**

3. Use the filter to **locate the expense** you wish to dispute
4. Place a **check in the box** for that timesheet
5. Click **Mark Disputed**
6. A box will appear. Use the dropdown to select the **Reason** for disputing the expense entry
7. Type any **Comments** if desired
8. Click **Save**

Contact the Managed Service Provider to inform them of the dispute. Once they accept the dispute, the expense entry will be credited, and a new entry can be submitted

Tie Out Payment

To determine payment information from a payment sent by Knowledge Services, follow these steps

1. Navigate to **Receivables Center**
2. Select **Vendor Remittance**
3. In the Vendor Payment search field, enter the **Payment Number** you are searching for
    a. A minimum of 3 digits must be entered in the search field
4. Click **Search**
5. Use the filters to locate the correct payment
6. **Check the box** next to the payment entry and click **Rate Sheet** to see the rate sheet details for the entry
7. Click the **Expand** arrow button to view more information for the line item 8. Use the **Search** button to locate another payment

Contact your MSP for further assistance. MSP contact information is available by clicking the **mail icon**

Notification Preferences

Notifications are sent directly from dotStaff regarding a specific action taken, or an action that needs to be taken. These notifications ensure our users are aware of activity taking place in the Product

There are two types of notifications:

1. **In Product Notification** = Sent directly in the Product utilizing the **Bell Icon in the upper right-hand corner**
2. **Email Notification** = Sent directly to the **notification email** associated to the user’s account

Verify the Notification Email

Users MUST verify their notification email in order to receive notifications

Follow these steps to verify the notification email

1. **Click on the text** in the yellow bar at the top of the screen upon logging in
2. **Confirm** the notification email listed is correct
    a If not, click **Update** in blue to update the email address
3. Click **Send Email**
4. **Locate** the email that was sent to the confirmed address
5. Click the **personal link** provided within the email. A Success message will appear

Manage Notifications

Users can manage which notifications they wish to receive and those they do not wish to receive. Follow these steps to regulate notification preferences

1. Click **My Account**
2. Select **Notification Preferences**
3. There are columns for **Email** and **Feed**. Select to turn on and off notifications by **clicking the icon**
    a. **On** = Green check mark
    b. **Off** = Red slash
4. When finished, click **Save**

Turn Posting Notifications On or Off

Upon logging in to a new account, the user is prompted to select **OK** or **Cancel**

- By **selecting OK**, the user will receive Posting notifications
    - By selecting **Cancel**, the user will not receive Posting notifications

Follow these steps to turn Posting notifications on or off:

1. Click **My Account**
2. Select **Personal Account**
3. Be sure the **About** tab is open and click **Edit**
4. Use the dropdown for **Posting Notifications** to select:
    a. **Yes** = User will receive Posting notifications
    b. **No** = User will not receive Posting notifications
5. Click **Save**