



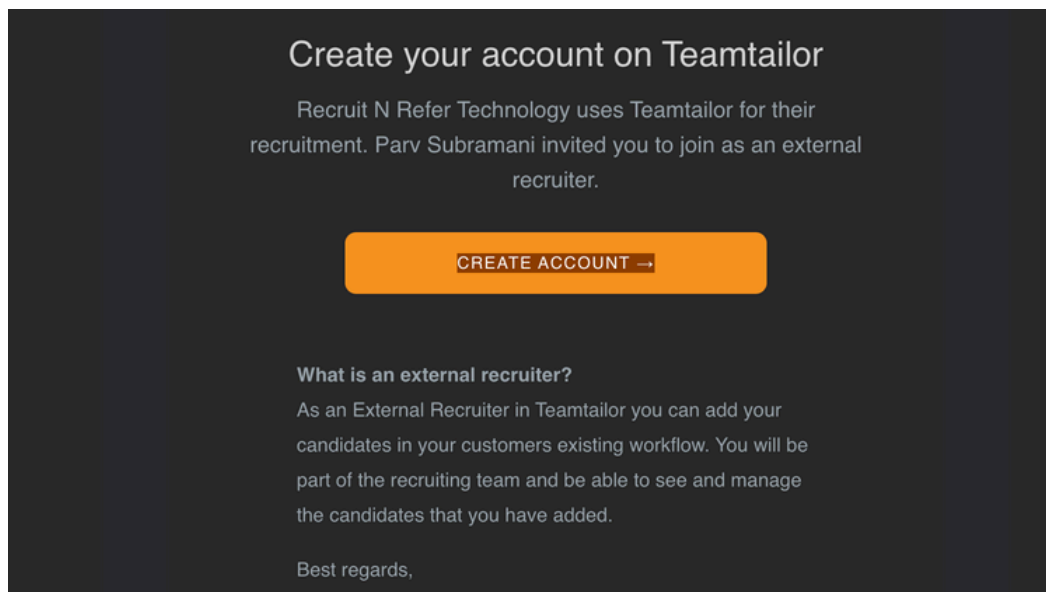
Access RNR's ATS

Let's get you set-up on RNR's ATS and start accessing CPA resumes and LinkedIn Recruiter projects all in one place! You will have access to:

1. **Your own personal ATS** - to store all your RNR candidates + access CPA resumes and CPA targeted LinkedIn Recruiter projects!
2. **Assigned RNR jobs** - RNR jobs you are sourcing for assigned to you, making it easy for you to move your accepted candidates on RNR. Get feedback ASAP!

Invite

RNR will send an invite to your RNR talent email. You will be prompted to create an account.



Personal ATS - Process

We'll assign you your own ATS, to make it easy for us to track your progress on assigned CPA resumes and LinkedIn profiles access. Please move these candidates throughout the pipeline stages.

As you start adding your own candidates, we'd like for you to follow these processes:

1. **Candidate Tags** - please tag your candidates based on:
 - a. **Level:** Senior/ Manager or Senior Manager
 - b. **Experience:** Audit (public/ private), Non-Audit (Private enterprise) or Tax (CAD/ US/ Cross Border)
 - c. **CPA or Non-CPA**

2. Set location - set the location on where a candidate is located when uploading candidates:

- a. **Ontario:** Toronto, GTA, Burlington and Hamilton
- b. **British Columbia:** Vancouver and Surrey
- c. **Alberta:** Calgary and Edmonton
- d. **USA:** San Diego, San Jose, New York, New Jersey, Chicago, Atlanta, etc.

3. Add Comments

a. Add any comments/ relevant information on the candidate that isn't highlighted in their resume

4. Check To-do

a. RNR Account Managers will assign you any tasks for scheduling interviews, asking additional questions, pitching different firms/ companies, etc. to your candidates once you've added these CPA's to relevant jobs.

(Only accepted submissions get moved to assigned jobs!)

5. Use the Screening Kits

a. We've set up Screening Call templates under the Interviews tab, please fill this template out as you phone screen candidates.

6. Send Emails

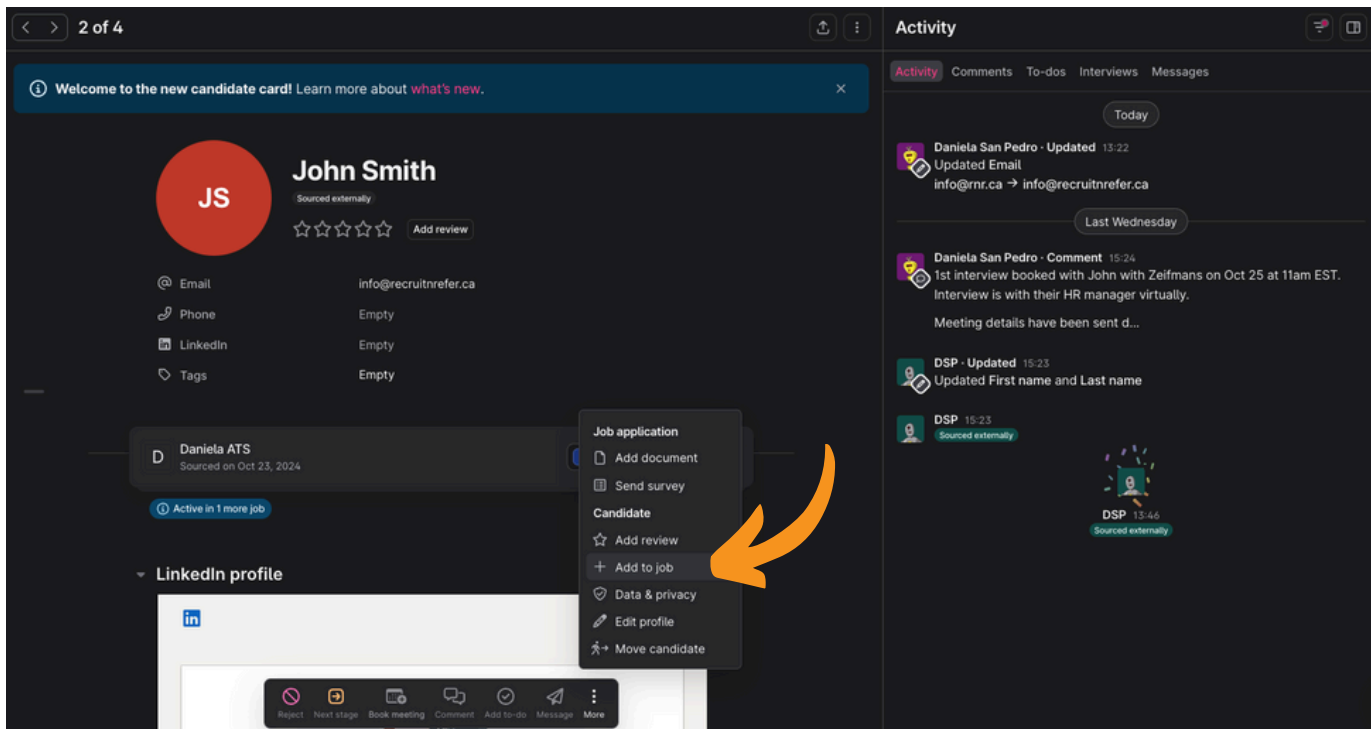
a. the Messages tab allows you to email candidates directly on the platform.

The screenshot displays a candidate profile for John Smith. The profile includes a red circular avatar with 'JS', contact details (Email: info@recruitrefer.ca, Phone: Empty, LinkedIn: Empty, Tags: Empty), and a 'Tags' section with a circled '1.'. Below the profile is a card for Daniela ATS, sourced on Oct 23, 2024, with 'Inbox' and 'Reject' buttons. The right sidebar shows an 'Activity' feed with four items: 'Updated Email' (13:22), 'Comment' (15:24), 'Updated First name and Last name' (15:23), and 'Sourced externally' (15:23). The top navigation bar has tabs for Activity, Comments, To-dos, Interviews, and Messages, with steps 3, 4, 5, and 6 highlighted in orange circles.

Assigned Jobs - Process

We will assign you a few jobs to focus on sourcing for RNR, once you have submitted these candidates on RNR and submission has been accepted, you will need to:

- Move these candidate(s) to the appropriate RNR jobs assigned to you



- **Check comments tab** - all updates from RNR's AM's on these candidates can be found in the candidate profile you have created and moved to an RNR job.
- **Check to-do tab** - AM's may assign you to-do tasks like getting a candidate's availability, any additional questions an Employer has, etc.

TIPS

1. **Use Apollo.io:** (sign-up for free with your RNR Talent email!) and send automated email campaigns to CPA resumes assigned to you
 - a. [Apollo PDF guide here](#)
2. **Use the ATS' browser extension**
 - a. Download and use their browser extension to add candidates without having to leave the current page you're on.