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Purpose

This job aid provides direction on how to create and manage interview schedules in TAM through the DaySmart Appointments integration. Users do not need DaySmart accounts to be able to create and use schedules through the integration with TAM.

Security Roles and Access

Role	Access	Description
WI_RECRUITER (Recruiter)	**Manage Job Opening > Interviews** **Interview Email Template** **Applicant Interviews**	Only users with this role can create, edit, and inactivate email templates
WI_RECRUITING_INTERVIEW (Interview Scheduler)	**Applicant Interviews**	Note this is only necessary for users that do not have access to the **Manage Job Opening** page

Navigation

Interview schedules can be created and accessed via the Applicant Interviews page or through the job opening.

Applicant Interviews Page

1. **Main Menu (NavBar)** > **Recruiting** > **Applicant Interviews**

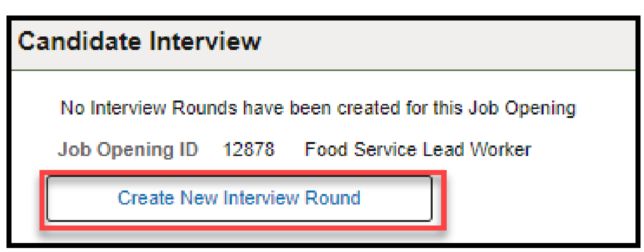
Through the Job Opening

1. **Recruiting Home Page** > **Recruiting Activities** > **Search Job Openings**
2. Enter the job ID into the Job Opening ID field
3. Select **Search**
4. Select the job opening title link to access the job opening
5. Select the **Interviews** tab

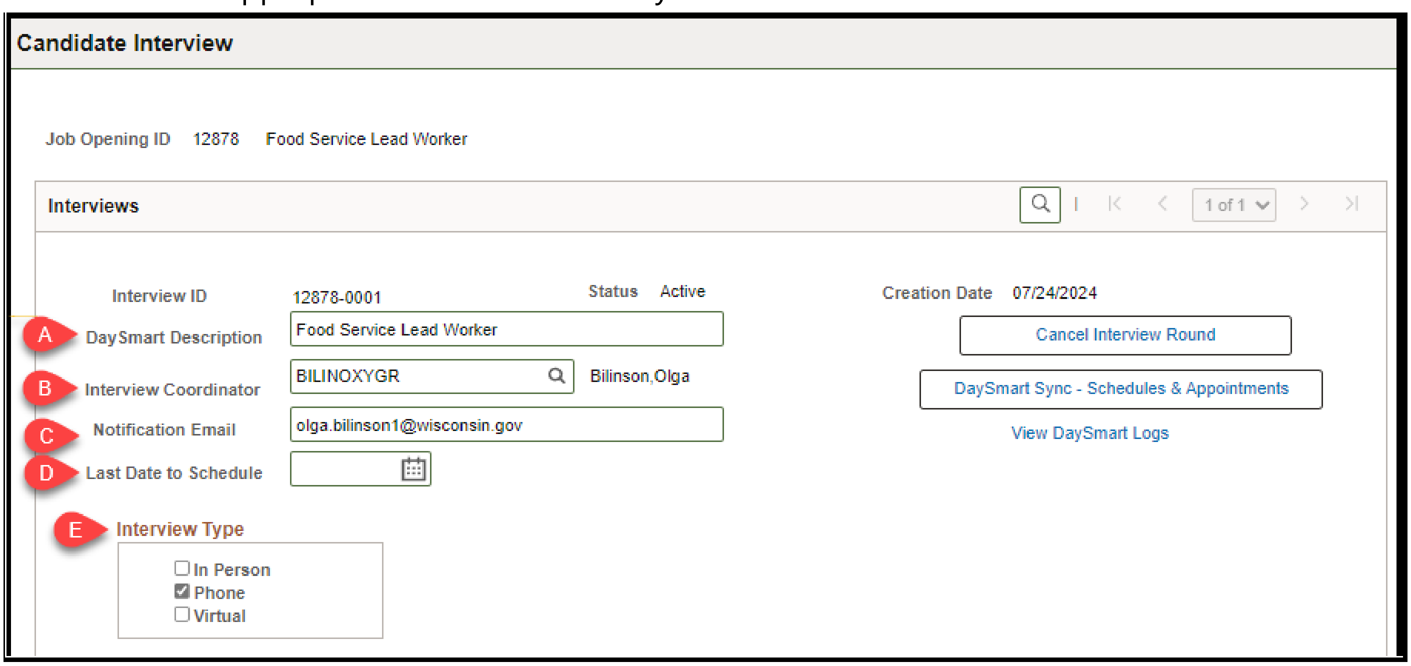
Creating a New Schedule

Interview schedules can be created using all applicants within a job opening or only certified applicants. Users also have the ability to select multiple interview types which allows applicants the flexibility to choose to attend an interview in person, virtually, or by phone.

1. Select **Create New Interview Round**



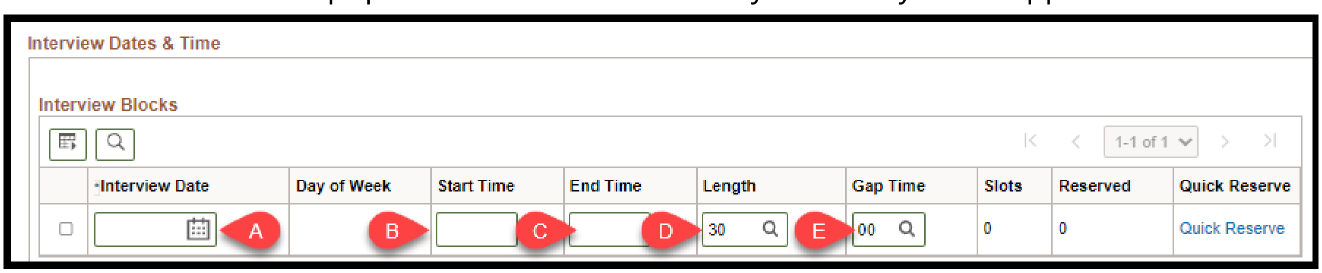
2. At the top of the Interviews section, enter or update values for the following fields:
   A. DaySmart Description: Defaults from the job posting title
   B. Interview Coordinator: Defaults to the IAM of the user who created the interview schedule
   C. Notification Email: Defaults to the business email address of the user who created the interview schedule
   D. Last Date to Schedule (optional): Can be set to a future date to limit how soon before an interview an applicant can reserve
   E. Interview Type: Select the appropriate interview type(s) for the round you're creating; you can select multiple types if you plan to allow applicants the flexibility to choose how they attend an interview
      i. In Person: Used when applicants are expected to be in person for an interview, exercise, or other appropriate recruitment activity
      ii. Phone: Used when applicants will be contacted by phone for phone screen or interview
      iii. Virtual: Used when applicants will be expected to be on camera using a virtual meeting platform (e.g. Teams, Zoom, etc.) for an interview, presentation, or other appropriate recruitment activity



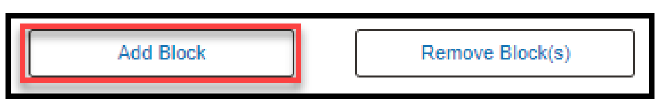
Select multiple interview types if you want to provide applicants with the option to select their preferred interview type. Example: Recruiter selects In Person and Virtual; the applicant can then choose In Person or Virtual as their preferred attendance method at the time of interview booking.

It is recommended that you save early and often.

3. At the top of the Interview Blocks section, enter or update values for the following fields:
   A. Interview Date: Select the first date interviews will be held
      i. Day of Week will populate after a date has been selected
      ii. You can have multiple interview blocks with the same date
         1. Example: Monday, 8/5/24, 8:00 AM – 11:00 AM and Monday, 8/5/24, 1:00 PM – 4:00 PM
   B. Start Time: Enter the first interview start time for the block
      i. Time format is HH:MM and "A" or "AM" for AM or "P" or "PM" for PM
         1. If blocks are held on the hour, you can enter HH and "A" or "AM" for AM or "P" or "PM" for PM
            a. Example: Enter "1P" for a Start Time of 1:00 PM for the block
      ii. You can have multiple interview blocks on the same date with different Start Times
         1. Example: Monday, 8/5/24, 8:**00** AM – 11:00 AM and Monday, 8/5/24, 12:**30** PM – 4:30 PM
   C. End Time: Enter the end time of the last interview for the block
      i. Time format is the same as that of Start Time
      ii. You will receive a system message that the "Interview End Time must be later than Start Time" if you do not specify AM or PM
   D. Length: Enter or select the max length of time, in increments of 5 minutes, for each interview to be conducted
      i. 30 minutes is the default
   E. Gap Time: Enter or select the length of time you want as a gap between interviews
      i. Slots will populate after the schedules syncs to DaySmart Appointments



4. Select **Add Block** to add additional interview blocks



5. Select **Save** after all interview blocks have been added

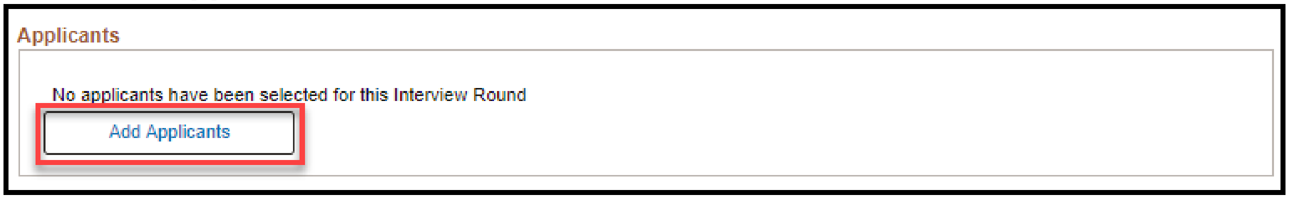
⚠ The first time you save after adding interview blocks, the schedule will need to sync with DaySmart Appointments. This may take up to 30 seconds if this is the first time you are saving after adding interview blocks.

Managing Applicants

Refer to the Sample Automated System Emails to Applicants section to view the emails applicants receive from the system after scheduling, rescheduling, or cancelling an interview themselves or when a Recruiter or Interview Scheduler acts on their behalf.

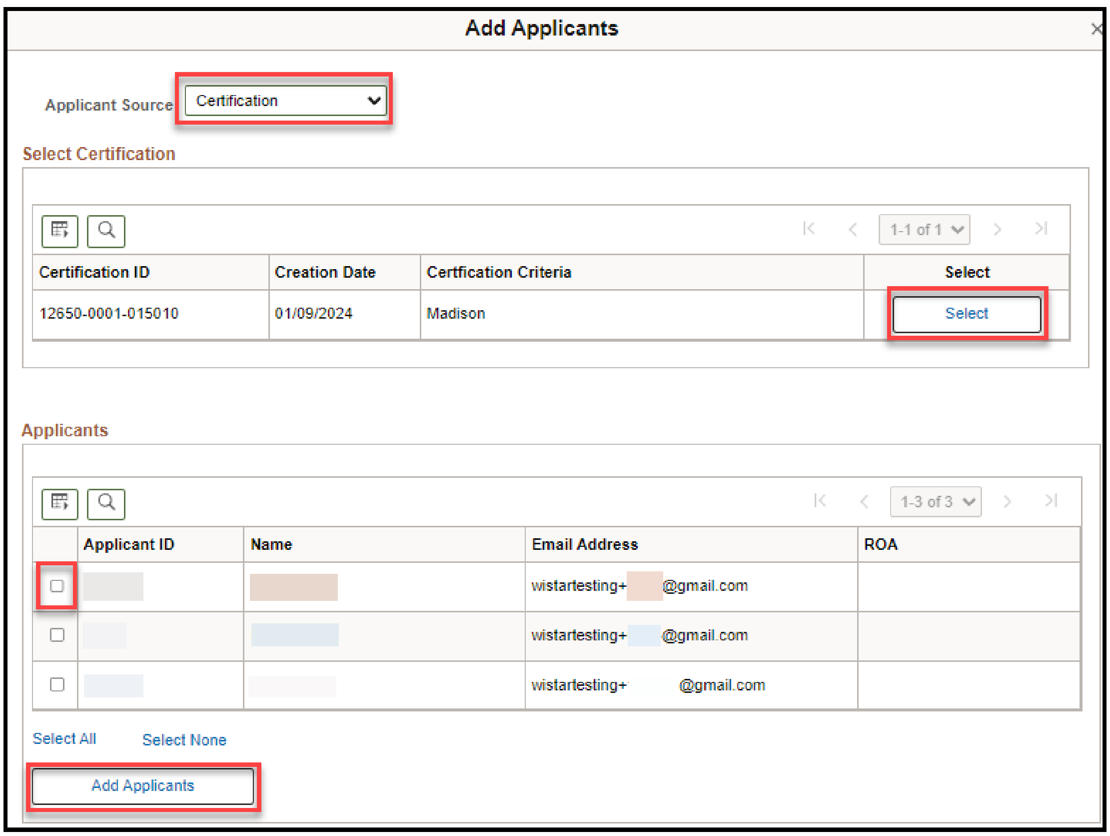
Adding Applicants to a Schedule

1. Select **Add Applicants**



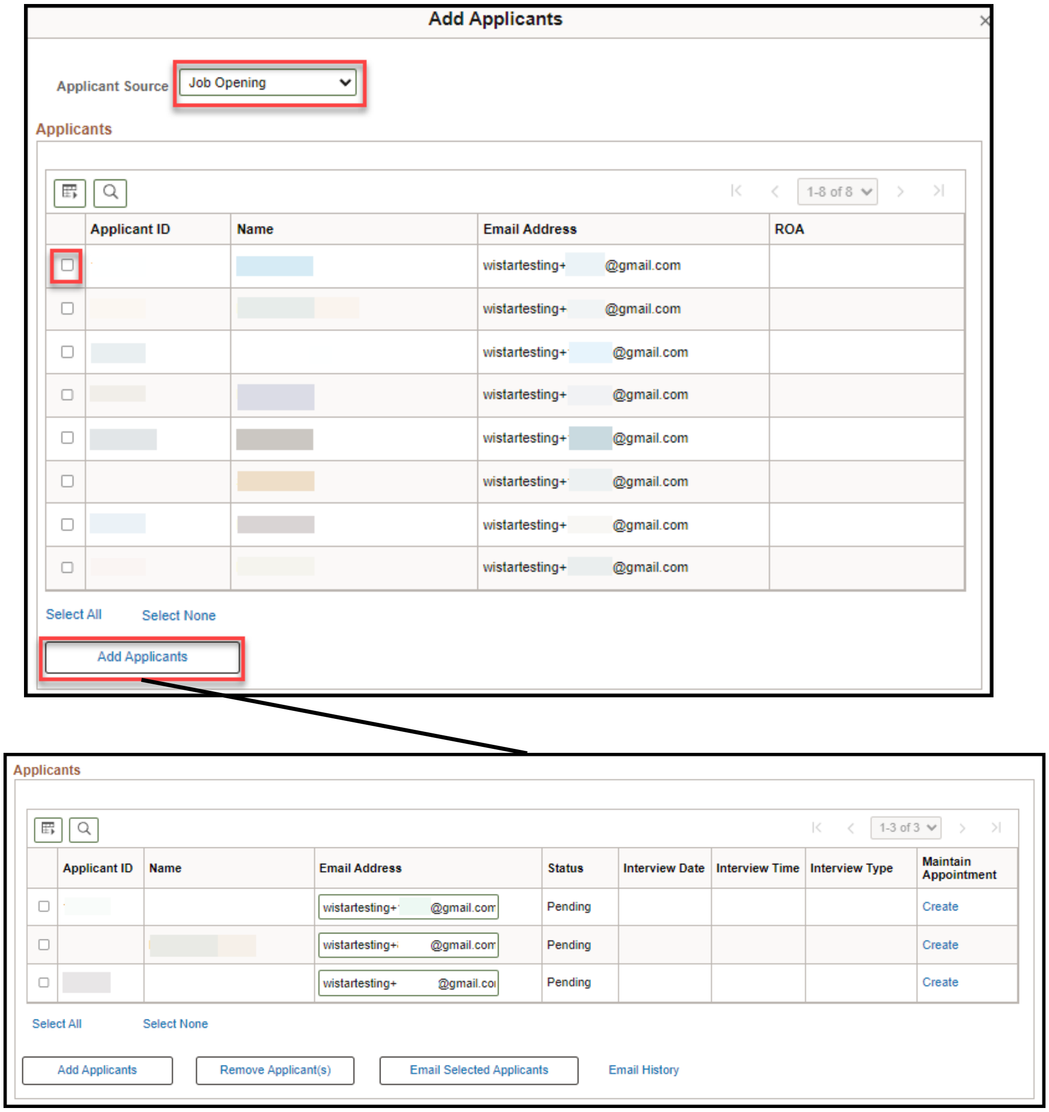
2. Select **Applicant Source**
    A. Certification: Select the certification ID to add applicants from that certification

If the job opening has multiple certifications, it is important to review the certification criteria to ensure you are selecting the correct one.



B. Job Opening: Default source; lists all applicants from the job opening regardless of their disposition

i. Click Select to select applicants from the desired certification



3. Select all applicants that will be invited to participate in the interview round

⚠ Select applicants carefully, making sure you are not adding applicants that have a disposition of Withdrawn or Reject. All applicants will be available to select regardless of their disposition, depending on the applicant source selected.

4. Select **Add Applicants**
   A. Selected applicants will now display under the Applicants section and should have a status of Pending
5. Select **Save**

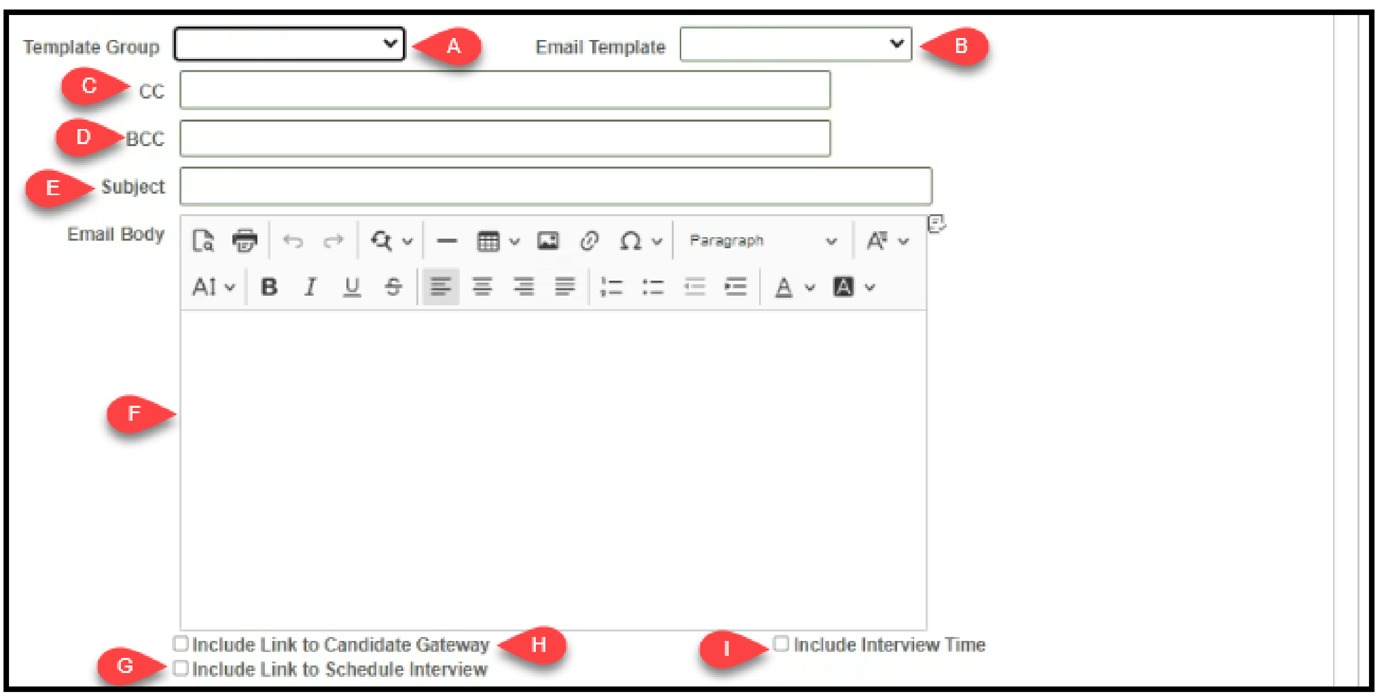
It is recommended that you sync the interview schedule with DaySmart after you create or modify interview blocks and times. It will otherwise sync periodically throughout the day.

Emailing Applicants

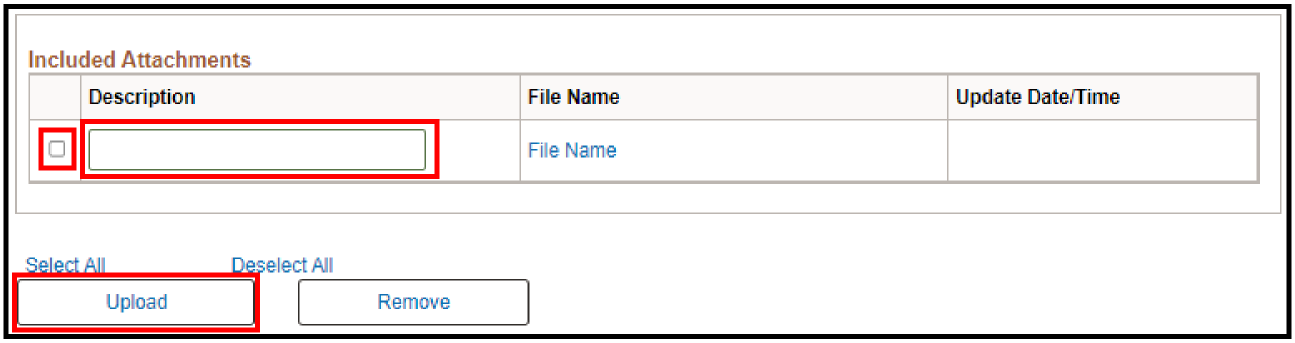
Users can use email templates that have been created for that region/agency or they can manually enter the information. If using an email template, you can further edit the email once selected but those changes will not permanently save to the original template. An email history can be viewed by clicking on the link at the bottom of the Applicants section.

See the Email Templates section for more information about creating, editing, and inactivating templates.

1. Select the checkbox next to the applicant(s) you want to email or click **Select All** to include all applicants
2. Select **Email Selected Applicants**
3. At the top of the page, enter or update values for the following fields:
    A. Template Group (optional): Select the template group
    B. Email Template (optional): Select the email template
    C. CC (optional): Enter an email address you want to receive a copy of the email – applicants will be able to see this email address
    D. BCC (optional): Enter an email address you want to receive a blind copy of the email – applicants will not be able to see this email address
    E. Subject: Enter a subject line that will tell recipients what the purpose of the email is
    F. Email body: Enter, or copy and paste from a Word document, the text of the email
    G. Include Link to Schedule Interview: Select the checkbox to include a link for applicants to schedule their interview
    H. Include Link to Candidate Gateway: Select the checkbox to include a link to Wisc.Jobs
    I. Include Interview Time: Select the checkbox to include the applicant's scheduled interview date and time



4. To add attachments, select **Upload** – the following attachment types are allowed: DOC, DOCX, ODT, PDF, RTF, and TXT
    A. Choose the file you want to attach
    B. Select **Upload**
    C. Enter a Description of the attachment
        i. There is limit of 30 characters, including spaces
    D. To remove an uploaded attachment, select the checkbox next to the applicable attachment and then select **Remove**



5. Select **Send Email**

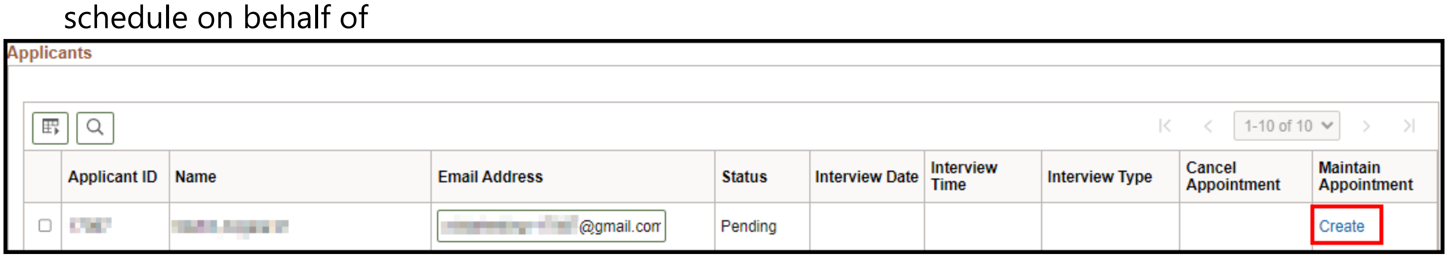
Removing Applicants from an Interview Round

If the applicant already has an interview scheduled, cancel the interview, then send the applicant an email explaining the reason for the cancellation and removal from the round. See [WI HR Handbook Chapter 212]() for additional guidance and steps required if the recruitment is being cancelled.

1. Select the checkbox next to the applicant(s) you want to remove
2. Select **Remove Applicant(s)**
3. Select **OK** to confirm removing the applicant from the interview round
4. Select **Save**

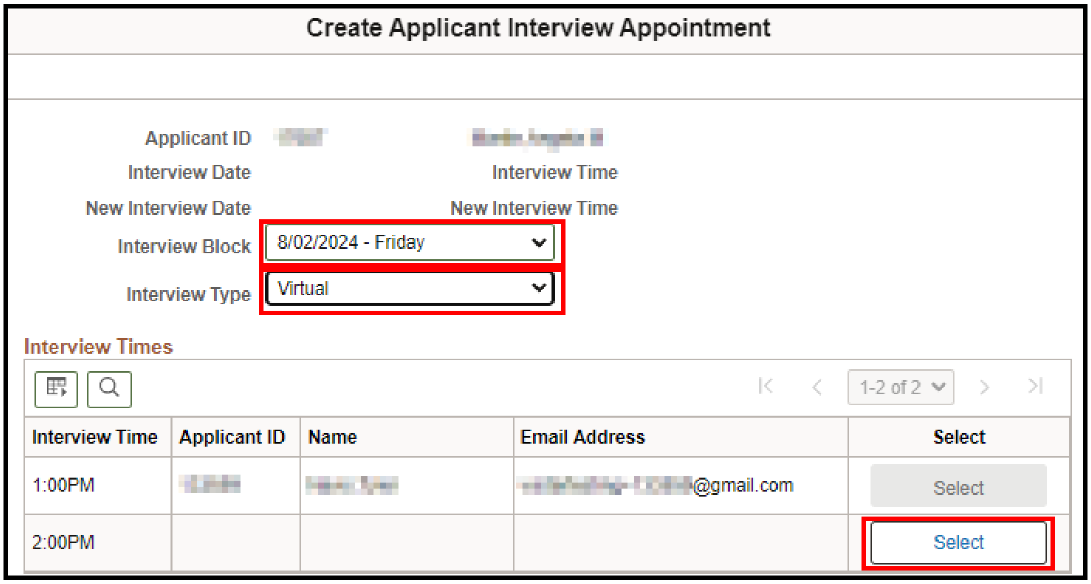
Scheduling on Behalf of an Applicant

1. Under the Applicant Section, click on the **Create** link next to the applicant you want to schedule on behalf of



2. Under Interview Block, select the desired date
3. Under the Interview Type, select the desired interview type (if applicable)

4. Select **Select** next to the desired interview time

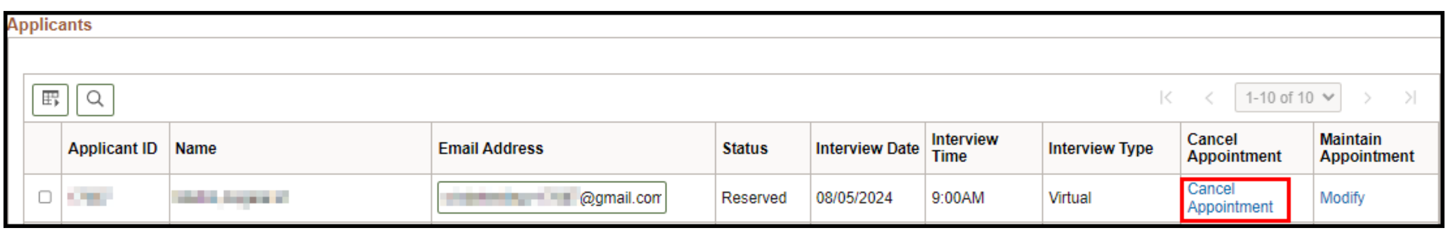


5. Select **Save & Return** to complete booking the interview
   A. Select **Cancel & Return** to cancel booking the interview and return to the Applicant Interviews page

The page will refresh, and the applicant's status will change to Reserved.

Cancelling on Behalf of an Applicant

1. Under the Applicant Section, click on the **Cancel Appointment** link next to the applicant you want to cancel on behalf of

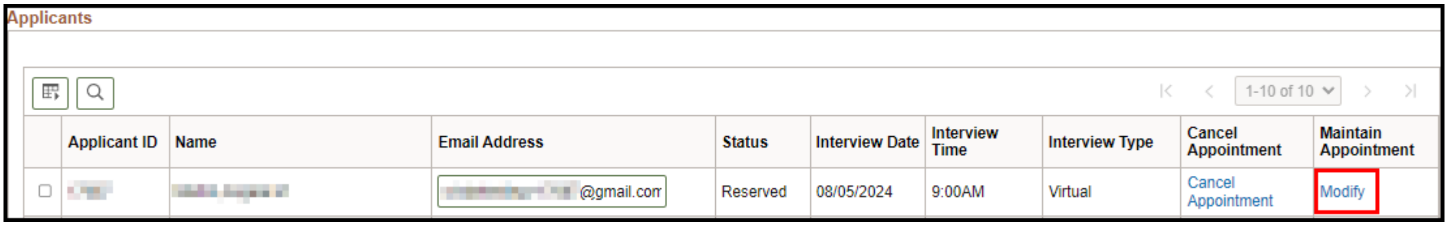


2. Select **OK** to confirm you want to cancel the applicant's interview
   A. Select **Cancel** to stop and return to the Applicant Interviews page

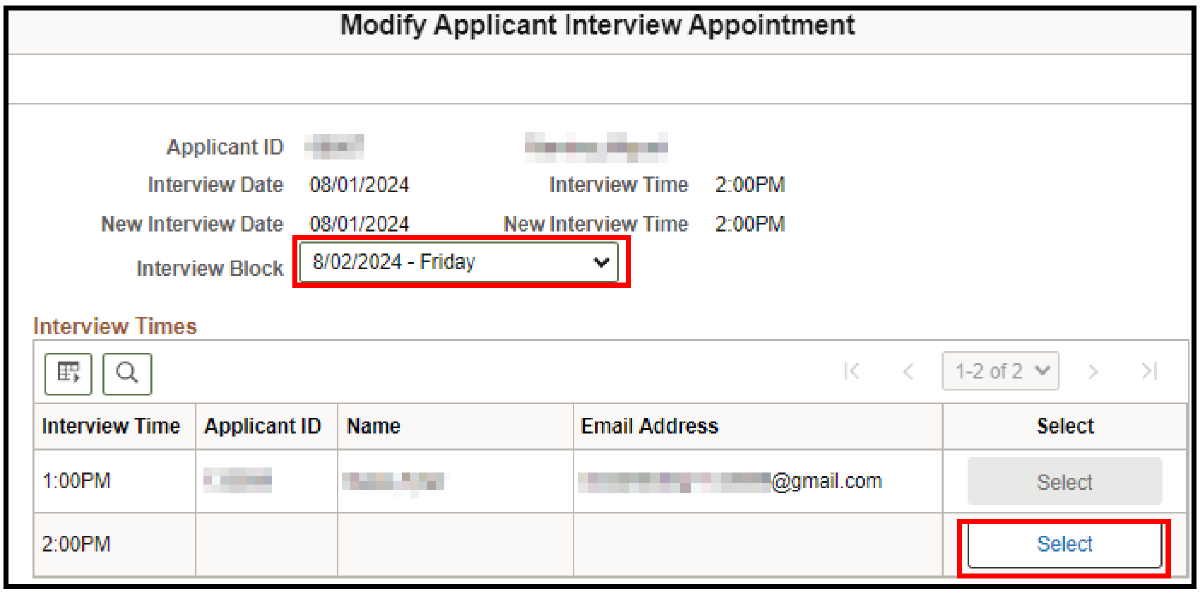
The page will refresh, and the applicant's status will change to Canceled.

Rescheduling on Behalf of an Applicant

1. Under the Applicant Section, click on the **Modify** link next to the applicant you want to reschedule on behalf of



2. Under Interview Block, select the desired date
3. Select **Select** next to the desired interview time



4. Select **Save & Return** to complete booking the interview
   a. Select **Cancel & Return** to cancel booking the interview and return to the Applicant Interviews page

The page will refresh, and the applicant's status will change to Reserved.

Frequently Asked Scheduling Questions

1. Does it matter if the case on the email address we have in TAM is different than what the applicant enters in when they schedule their interview? Example: The email address that was used to email the applicant was DOADPMBMRS@wisconsin.gov but they entered in doadpmBMRS@wisconsin.gov when they scheduled.

   Answer: No, the integration will ignore any mismatches in case and automatically match the emails.

2. What if an applicant books an interview time using a different email than what we used to invite them with?

   Answer: Unmatched appointment(s) will show below the Applicants section. Click on the link to view those applicants, then under **Map to Applicant**, select the applicant you want to map the email address to, then select **Save & Return**, and lastly select **DaySmart Sync – Schedules & Appointments** to update the schedule.

   Warning: 3 unmatched appointment(s)

3. What if an applicant has a link for a job posting that is no longer open for scheduling but they were able to get to a list of all jobs for my region/agency and they signed up for an interview block for a job they didn't apply for?

   Answer: Erroneous applicant(s) will show as an unmatched appointment below the Applicants section. From there you can cancel the appointment. It is recommended that you email the "applicant" to notify them why the appointment was cancelled.

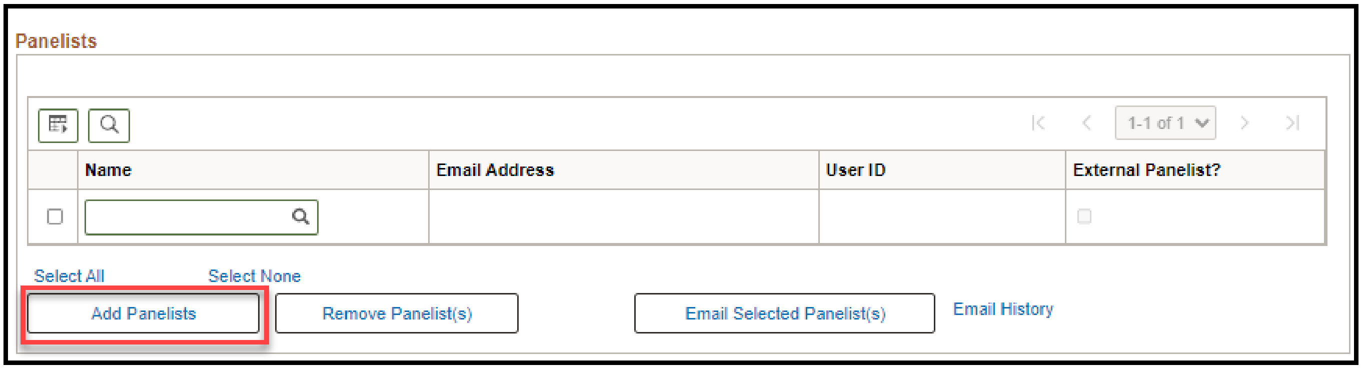
4. Applicants had the option to choose to attend their interview in person or virtually. What if an applicant wants to change their interview type after they scheduled? Example: They initially selected Virtual but now they can attend In Person.

   Answer: Recruiters and Interview Schedulers are unable to modify the interview type the applicant selected when they scheduled. They can either cancel and then reschedule their interview at which time they can have the type changed or you can keep track of it outside of the system and notify your panelists and applicant how they will actually plan to attend their interview. Modifying a scheduled appointment will not allow you to change the interview type.

Managing Panelists

Adding Panelists to a Schedule

1. Under the Panelists section, select the magnifying glass in the **Name** field to look up current state staff



   A. Check the **External Panelist?** box to manually enter in an external panelist's first and last name and contact email address

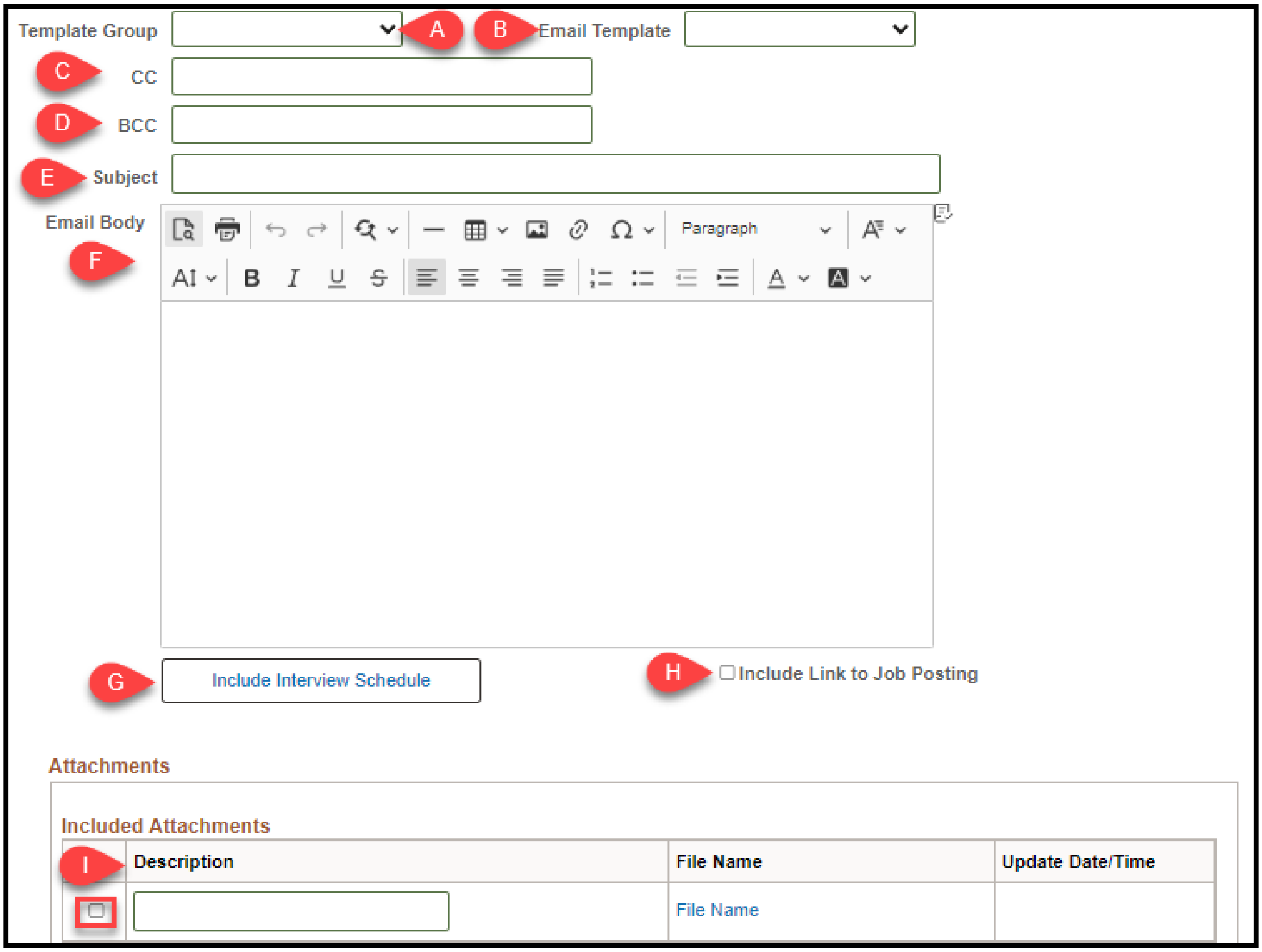
2. Select **Save** after all panelists have been added

Emailing Panelists

Users can use the system to email panelists drafted schedules, applicant attachments, and interview materials. An email history can be viewed by clicking on the link at the bottom of the Panelists section.

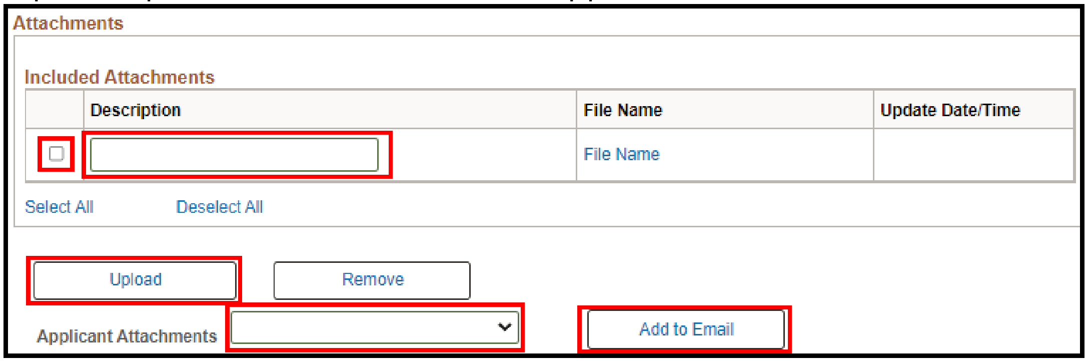
1. Select the checkbox next to the panelist(s) you want to email or click **Select All** to include all panelists
2. Select **Email Selected Panelist(s)**
3. At the top of the page, enter or update values for the following fields:
   A. Template Group (optional): Select the template group
   B. Email Template (optional): Select the template
   C. CC (optional): Enter an email address you want to receive a copy of the email – applicants will be able to see this email address
   D. BCC (optional): Enter an email address you want to receive a blind copy of the email – applicants will not be able to see this email address
   E. Subject: Enter a subject line that will tell recipients what the purpose of the email is
   F. Email body: Enter, or copy and paste from a Word document, the text of the email
   G. Include Interview Schedule: Select to add an Excel version of the interview schedule as an attachment to the email
   H. Include Link to Job Posting: Check the box to include a link to the job posting at the end of the email body

I. Description: If you selected to include the interview schedule, the description field will auto populate with that document information



4. To add additional attachments, select **Upload** – the following attachment types are allowed: DOC, DOCX, ODT, PDF, RTF, and TXT
   A. Choose the file you want to attach
   B. Select **Upload**
   C. Enter a Description of the attachment
      i. There is limit of 30 characters, including spaces
   D. To remove an uploaded attachment, select the checkbox next to the applicable attachment and then select **Remove**
5. To add attachments applicants uploaded to TAM as part of their application, select the attachment from the **Applicant Attachments** dropdown

6. Select **Add to Email**
   A. Repeat steps 5 and 6 to add additional applicant attachments



7. Select **Send Email**

Removing Panelists from an Interview Round

Refer to WI HR Handbook Chapter 176 for more information regarding interview process policies and procedures.

1. Select the checkbox next to the panelist(s) you want to remove
2. Select **Remove Panelist(s)**
3. Select **OK** to confirm the panelist removal

Managing Interview Schedules

Cancelling an Interview Round

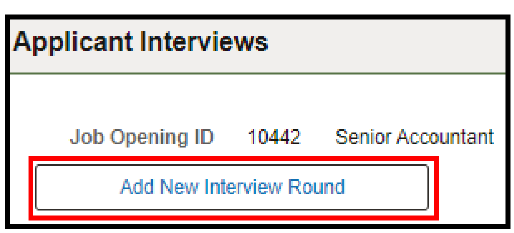
Use the following steps to cancel an interview round, this includes all dates and times. Don't forget to notify applicants as needed.

1. Select **Cancel Interview Round**
2. Select **OK** to confirm cancellation

Creating a New Interview Round

Create a new interview round if you are planning to hold 2nd or 3rd interviews with top candidates after the initial interview or phone screen. Additional rounds would also be created if the job opening has multiple certifications and different interview panels for different locations or certification criteria.

1. Select **Add New Interview Round**

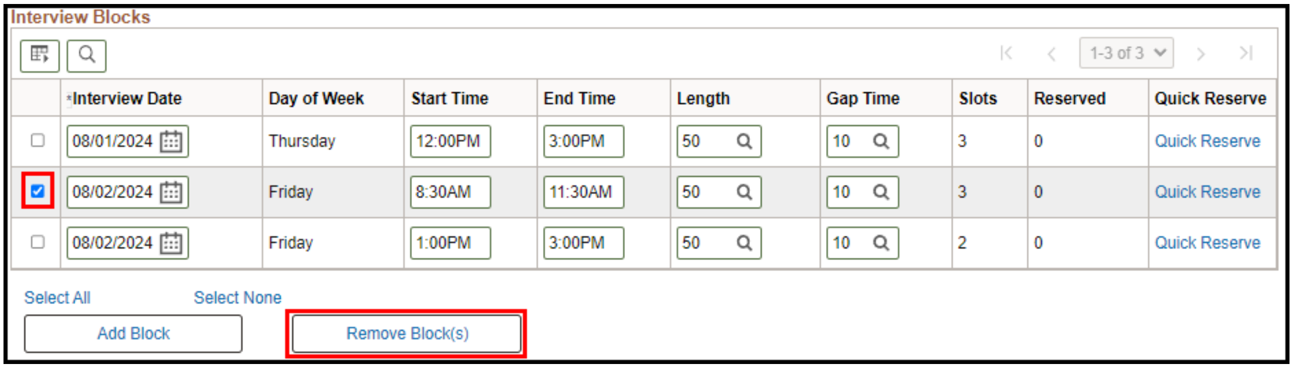


2. Use the arrow buttons at the top right of the Interviews section to navigate to the new round

3. Follow steps 2 through 5 of the [Creating a New Schedule](#) section

Removing Interview Blocks

1. Under the Interview Blocks section, select the checkbox next to the interview block you want to remove
2. Select **Remove Block(s)**



Interview Blocks

1-3 of 3

	*Interview Date	Day of Week	Start Time	End Time	Length	Gap Time	Slots	Reserved	Quick Reserve
☐	08/01/2024	Thursday	12:00PM	3:00PM	50	10	3	0	Quick Reserve
☑	08/02/2024	Friday	8:30AM	11:30AM	50	10	3	0	Quick Reserve
☐	08/02/2024	Friday	1:00PM	3:00PM	50	10	2	0	Quick Reserve

Select All Select None

Add Block Remove Block(s)

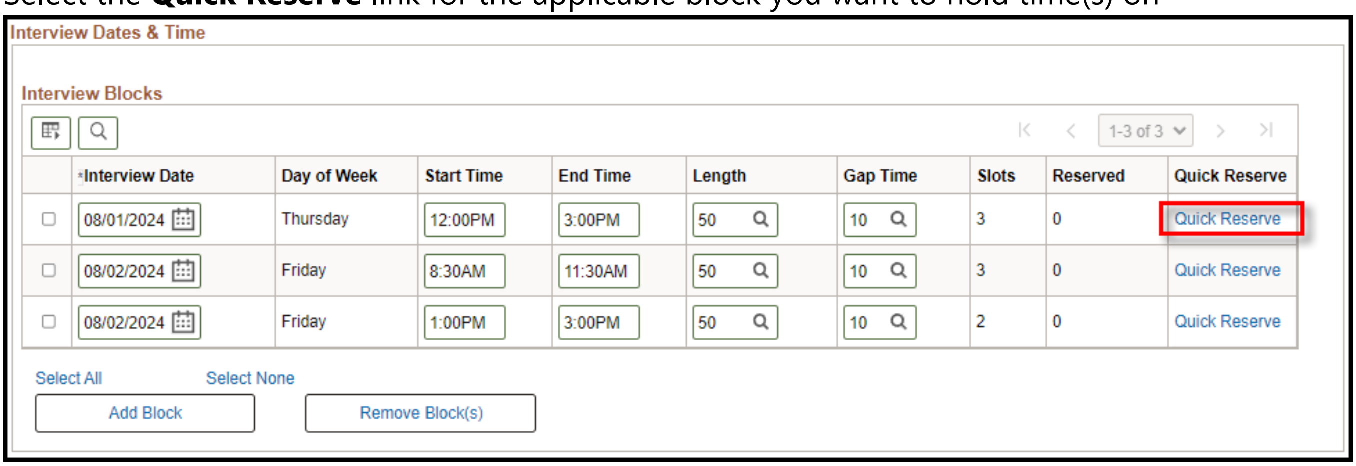
3. Select **DaySmart Sync – Schedules & Appointments**
4. Select **Save**

Quick Reserving Dates or Times

After the interview schedule has been synced with DaySmart, use the following steps to quickly reserve timeslots for panel breaks (i.e., lunch, appointments, etc.) or other times you don't want applicants to be able to select when scheduling.

> ⚠ You must sync the schedule with DaySmart before Quick Reserve functionality is available.

1. Select the **Quick Reserve** link for the applicable block you want to hold time(s) on



Interview Dates & Time

Interview Blocks

1-3 of 3

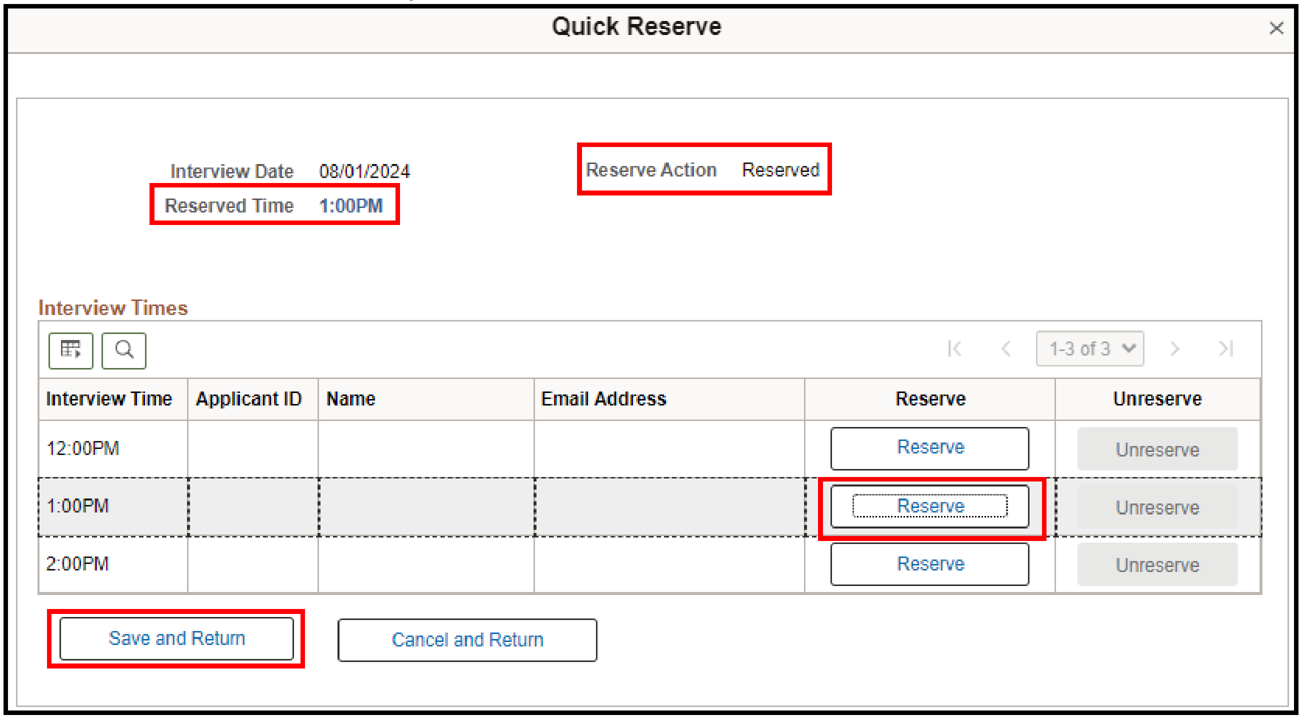
	*Interview Date	Day of Week	Start Time	End Time	Length	Gap Time	Slots	Reserved	Quick Reserve
☐	08/01/2024	Thursday	12:00PM	3:00PM	50	10	3	0	Quick Reserve
☐	08/02/2024	Friday	8:30AM	11:30AM	50	10	3	0	Quick Reserve
☐	08/02/2024	Friday	1:00PM	3:00PM	50	10	2	0	Quick Reserve

Select All Select None

Add Block Remove Block(s)

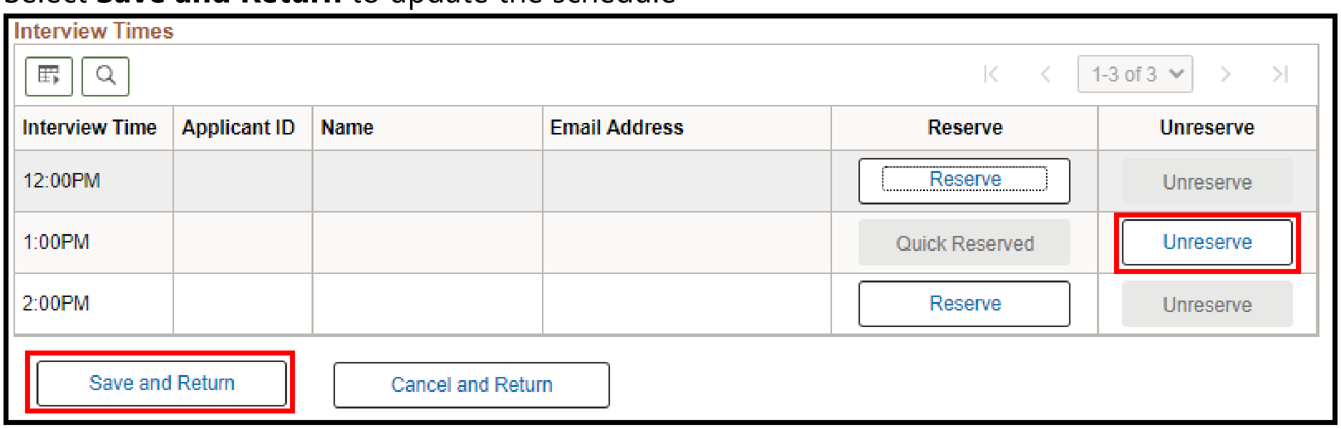
2. Select **Reserve** for the Interview Time you want to hold

3. Select **Save and Return** to update the available interview times



Removing Quick Reserved Times

1. Select the **Quick Reserve** link for the applicable block you want to remove the hold from
2. Select **Unreserve** for the time you want to release for scheduling
3. Select **Save and Return** to update the schedule



Email Templates

Only users with the WI_Recruiter security role will be able to create, edit, and inactivate email templates.

> ⚠ Coordinate with your agency or region's primary recruitment contact before creating a new template.

Navigation

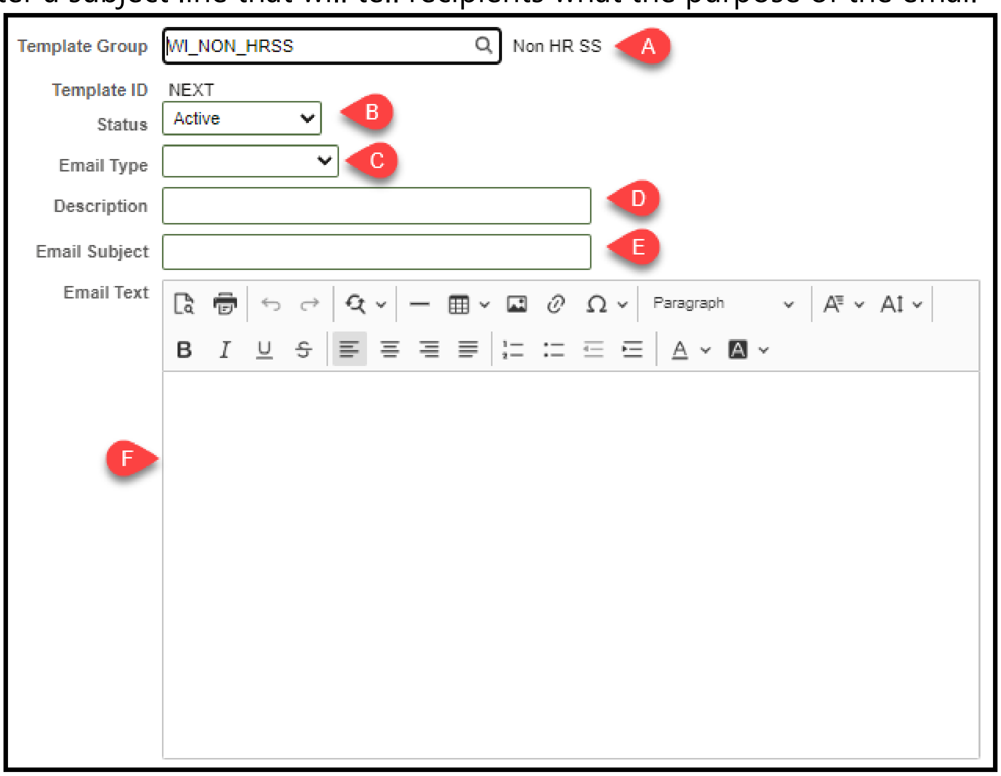
1. Navigate to **Recruiting > Administration > Interview Email Templates**

Adding an Email Template

1. Select **Add a New Value**
2. Select the appropriate template group, Region or Non-HRSS
3. Select **Add**
4. At the top of the page, enter or update values for the following fields:
   A. Template Group: Defaults from the Template Group initially selected
   B. Status: Select Active or Inactive, this determines whether the template is available to be selected when using the Email Applicant(s) or Email Panelist(s) functionality
   C. Email Type: Select Applicant or Panelists
   D. Description: Enter in the name of the template
      i. There is limit of 30 characters, including spaces

> ⚠ Agency specific templates must include a prefix for the agency. Example: ETF – Interview Invitation

   E. Email Subject: Enter a subject line that will tell recipients what the purpose of the email is
   F. Email Text: Enter, or copy and paste from a Word document, the text of the email



5. Select **Save**
    A. **Template ID** will populate after you save
6. To add additional templates, select **Add** in the bottom right-hand corner of the page and repeat steps 5 through 6

Editing an Email Template

1. Use the **Search By** field to find the applicable email template; you can search by Description, Email Template ID, Email Type, Status, or Template Group
    A. To use multiple search fields, select **Show More Options**

2. Select **Search**
3. Select the template you want to edit
4. Make your desired changes to the template fields
5. Select **Save**

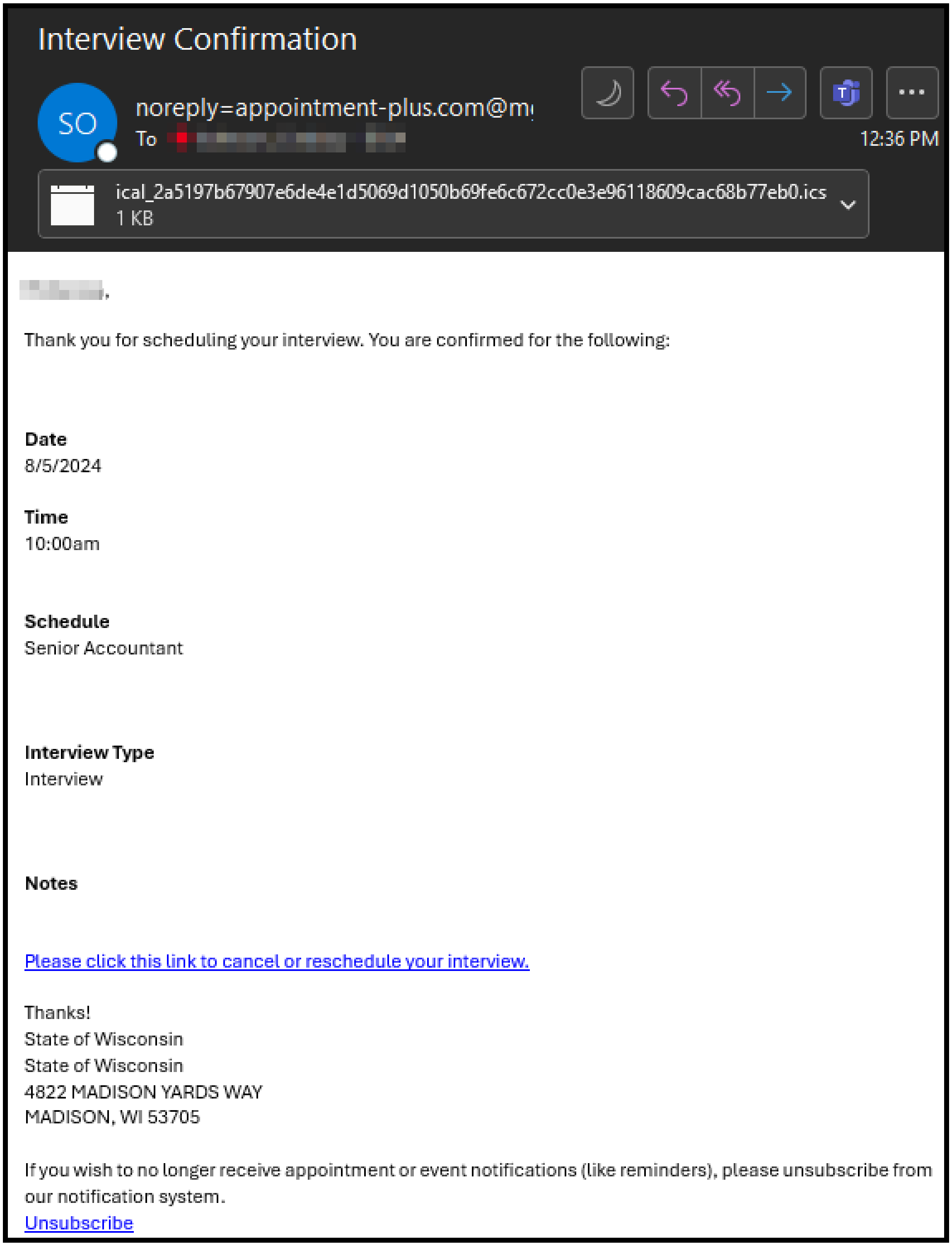
Inactivating an Email Template

1. Use the **Search By** field to find the applicable email template; you can search by Description, Email Template ID, Email Type, Status, or Template Group
    A. To use multiple search fields, select **Show More Options**
2. Select **Search**
3. Select **Inactive** under Status
4. Select **Save**

Sample Automated System Emails to Applicants

Interview Confirmation

Applicants will receive a message like the one shown below after scheduling or having an interview scheduled on their behalf.



Interview Confirmation

noreply=appointment-plus.com@m

To [redacted]

12:36 PM

ical_2a5197b67907e6de4e1d5069d1050b69fe6c672cc0e3e96118609cac68b77eb0.ics
1 KB

[redacted],

Thank you for scheduling your interview. You are confirmed for the following:

Date
8/5/2024

Time
10:00am

Schedule
Senior Accountant

Interview Type
Interview

Notes

Please click this link to cancel or reschedule your interview.

Thanks!
State of Wisconsin
State of Wisconsin
4822 MADISON YARDS WAY
MADISON, WI 53705

If you wish to no longer receive appointment or event notifications (like reminders), please unsubscribe from our notification system.
Unsubscribe

Interview Change Confirmation

Applicants will receive a message like the one shown below after rescheduling or having an interview rescheduled on their behalf.

Interview Change Confirmation

SO noreply=appointment-plus.com@

To [redacted]

12:48 PM

ical_2a5197b67907e6de4e1d5069d1050b69fe6c672cc0e3e96118609cac68b77eb0.ics
2 KB

[redacted],

This is a confirmation to let you know that your interview has been changed. The following is your updated interview information:

Date
8/5/2024

Time
2:00pm

Schedule
Senior Accountant

Interview Type
Interview

Notes

Please click this link to cancel or reschedule your interview.

Thanks!
State of Wisconsin
State of Wisconsin
4822 MADISON YARDS WAY
MADISON, WI 53705

If you wish to no longer receive appointment or event notifications (like reminders), please unsubscribe from our notification system.
Unsubscribe

Interview Cancellation Notification

Applicants will receive a message like the one shown below after cancelling or having an interview cancelled on their behalf.

Interview Cancellation Notification

SO noreply=appointment-plus.com@m
To [redacted]
12:33 PM

[redacted],

Thank you for letting us know that you would like to cancel your interview. Your interview has been cancelled.

Date
8/5/2024

Time
10:00am

Schedule
Senior Accountant

Interview Type
Interview

Notes

If you would like to reschedule your interview, please follow the instructions in the interview invite you received from the HR department.

Thanks,
State of Wisconsin
State of Wisconsin
4822 MADISON YARDS WAY
MADISON, WI 53705

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Unsubscribe