Agenda

- Process Overview
- Candidate Submission
- Compliance
- CAI Screening Process
- PeopleFluent
- Time Entry
- Additional Information
- Questions

Please hold any questions until the completion of the presentation. Thank you.
Process Overview

1. Consult
   - CAI consults with Agency and qualifies need.

2. Create
   - Agency creates the order in the PeopleFluent® System.

3. Validate
   - CAI validates the requirement for completeness and submits to supplier network.

4. Submit
   - Suppliers submit candidates within 5 business day submittal window.

5. Qualify
   - Following closing of submittal window, CAI screens candidates' resumés and forwards qualified candidates to Agency within 3 business days.

6. Review
   - Agency reviews qualified candidates and selects interviewees.

7. Coordinate and Select
   - CAI coordinates the interview and on-boarding process. Agency selects candidate for engagement.

8. On-board
   - Supplier facilitates background checks, screenings, and signing of non-disclosure and other conditional documents. Reports sent to CAI.

9. Start Work
   - Candidate is engaged and begins assignment.

10. Evaluate
    - CAI consults with Agency to review resource work and completes evaluation in PeopleFluent® for Supplier feedback.
Candidate Submission

• All reqs are open for competition

• Educate your candidates on the process
  • Email critical job-specific details to candidate, so they are informed
  • Validation requirements (both ERTR and during screening call). We will not screen candidates that do not comply with validation requirements
    • Make sure candidate submits ERTR in timely manner
  • Instill sense of Urgency

• Provide accurate candidate contact information

• Candidate Profile Data Integrity
  • Skills
  • Resume

• Resumes should include req specific content in resume body, not just Technical Summary
Compliance

- For ALL candidate submissions, please use following naming convention
  - Use “true” first and last names, no shortened or nicknames (i.e. James changed to Jim etc.)
  - Include candidate’s middle initial in ALL candidate submissions

- Candidate profile name & supporting compliance documentation name MUST match exactly
  - First and Last Names should mirror legal documents (i.e. Driver’s License/Passport)
    - Middle initial can be used in lieu of legal middle name, but 1st and Last Names must be identical to legal documents
  - Name must also match name listed on certified payroll checks being collected for audits
Compliance (cont.)

- CAI will validate skills listed in resume and PeopleFluent candidate profile to ensure they are accurate and meet contract requirements.

- **Background Checks & Compliance Items**
  - Must be completed by 3rd party organization
    - Includes Education and Certification verifications
  - If Education is listed on the resume – it MUST be verified in Compliance documentation, regardless of req requirements.

- **Review Compliance tab in each req for agency/req specific compliance requirements**
  - Carefully review Compliance tab and ensure 3rd party company can accommodate ALL requirements for each req.

- **Contractual Compliance: ALL Candidates MUST have direct W2 or 1099 Relationship**
  - Sub-contract layering is not permitted
  - Important: Watch communications for upcoming audits.
CAI’s on site team conducts quality control for each req— all candidates are reviewed

- Validate the ERTR from the candidate is sent following proper protocol
- Call candidates meeting requirements to discuss availability and validate professional experience
  - Baseline information covered during call:
    - Validation of submitting firm
    - Location and availability for interview/start
    - Skills and communication validation
    - Current and prior experience
    - Position specific questions provided by the client
  - Screening starts during the 5 day submission window, and is completed within the 3 day SLA window CAI has to forward candidates to the client

- CAI forwards only the most qualified candidates for consideration
  - CAI will send a notification email via PeopleFluent for candidates who are forwarded to the client. If you do not receive a PeopleFluent notification, your candidate was not forwarded
CAI Screening Process (cont.) - E-RTR

CAI’s MSP Right to Represent Control Process

Supplier submits candidate in PeopleFluent® System.

Supplier emails candidate position details and E-RTR template.

Candidate updates template with position specifics (name, supplier name, req. name and number).

Candidate emails completed RTR to designated RTR mailbox from personal email address listed in PeopleFluent®.

If candidate is selected for screening, CAI AM checks RTR mailbox for email from candidate.

If RTR is in mailbox from candidate’s personal email address and is filled out correctly, CAI AM will phone screen candidate.

CAI forwards qualified candidates to Agency following phone screening.

If RTR is not in mailbox from candidate’s personal email address, or is not filled out correctly, CAI AM will reject candidate.

CAI AM uploads E-RTR emails from forwarded candidates into each candidate’s PeopleFluent® profile for secure storage.
PeopleFluent

- **Requirement Status**
  - Open, Interviews Occurring, Filled

- **Candidate Status**
  - New, Active, Schedule Interview, Engagement Requested
  - Keep candidates informed
  - Update candidate status as needed

- **Additional Information**
  - Bill Rate vs. Vendor Rate
  - Required/Desired Skills section must be completed accurately with candidate’s actual years of experience
All engaged resources must have access to the District’s PASS time entry system

- Candidates should contact his/her District PM and CAI Contract Manager if they do not have PASS access. Candidates should follow up with supervisor to make sure they have setup their User Maintenance so the candidate can access PASS

Engaged candidates must submit timesheets by **12:00 PM each Monday** in the District’s PASS time system

“Zero –hour” timesheets must be submitted in PASS if a candidate does not work a given week during their engagement tenure

Engaged candidates DO NOT need to submit timesheets in the PeopleFluent VMS system

- Timesheets will be uploaded from the District’s PASS time system into the PeopleFluent VMS system by close of business each Thursday
- If time is not showing in PeopleFluent, it was either not entered or approved in PASS
Engagements have a maximum duration of 12 months. If service needs to continue after one year, a new requirements is developed detailing that need for service and the requirement is opened for competition.

- No Extensions beyond the listed end date will be granted

- Pay attention to PeopleFluent notifications

- All communications are to be directed to CAI, not the PM’s. Infractions may result in corrective action
  - Email is best way to initiate communication with local CAI team
Questions