



a member of THE FEDCAP GROUP

**Partner's Portal Guide**

[portal.reserveinc.org](http://portal.reserveinc.org)

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*For additional support, contact us at [info@reserveinc.org](mailto:info@reserveinc.org) or 877-290-6145.*

# Change Your Contact Info

After logging in, you will be directed to your profile page.

All fields can be changed except your email address.

(To change your email address, contact ReServe.)

RE<sup>+</sup>SERVE<sub>crm</sub>

HOME • ADD STAFF • ORGANIZATION PROFILE • POSITIONS •

David Somerset  
ORGANIZATION STAFF

Home • Organization • Staff

You are logged in

Organization staff: test **David Somerset**

Organization: Universal Exports

My Profile  
Change password

**BIO information**

First name: David  
Last name: Somerset  
Title: test

**Contact Information**

Work phone  
Mobile phone: 123-123-1231  
Email: orgtest@orgtest.com

**Address Information**

To edit any field:

1

Click on the field

2

Edit the text

3

Click  to save the change

# Change Your Password

After logging in, you will be directed to your profile page.

① Click **Change password** on the left side of the page.

HOME • ADD STAFF • ORGANIZATION PROFILE • POSITIONS

Home • Organization • Staff

You are logged in

Organization staff: test **David Somerset**

Organization: *Universal Exports*

My Profile

**Change password**

BIO information

First name: David

Last name: Somerset

② On the next page, put in your old password, and your new password twice. Then, click **CHANGE PASSWORD** to save the change.

Old password

.....

New password

.....

Password confirmation

.....|

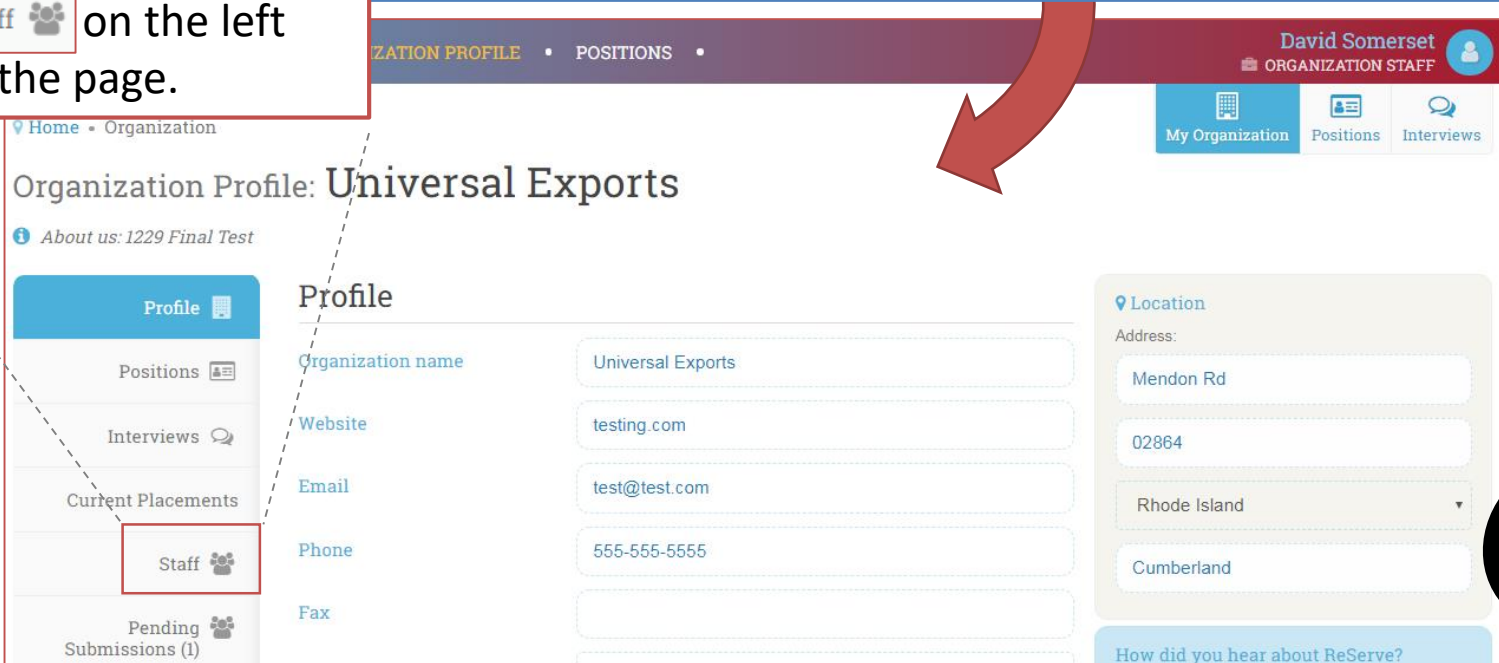
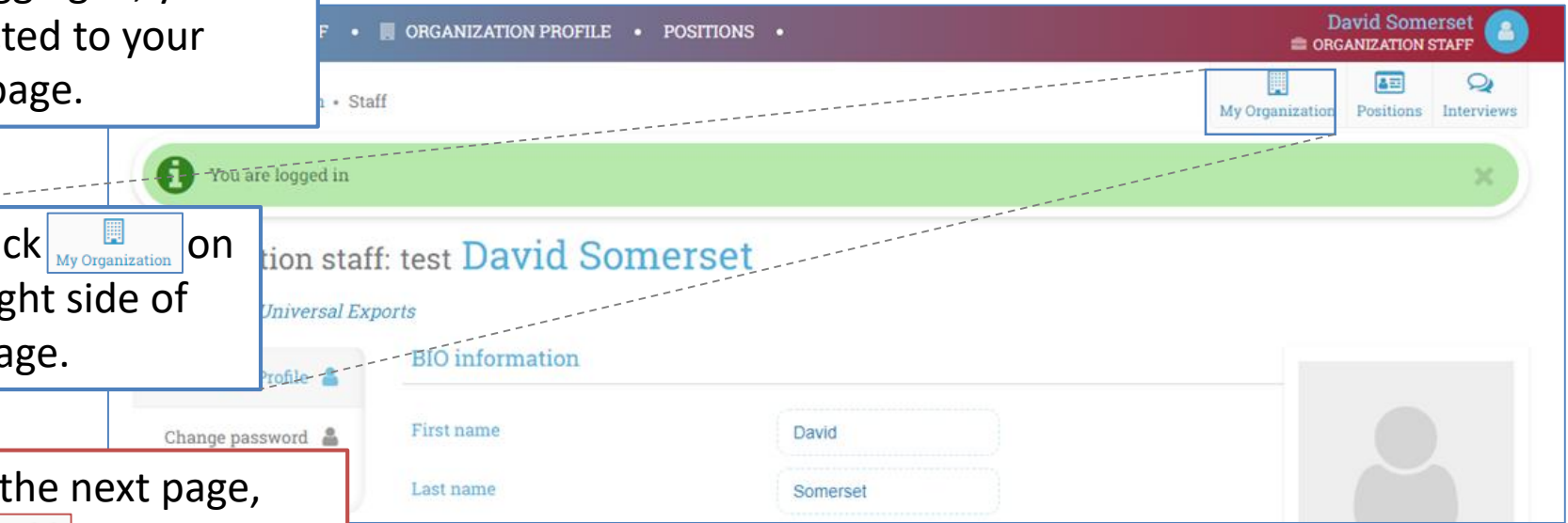
**CHANGE PASSWORD**

# Add a Co-worker to the Portal (1/3)

After logging in, you will be directed to your profile page.

① Click **My Organization** on the right side of the page.

② On the next page, click **Staff** on the left side of the page.



Continued  
in Part 2

# Add a Co-worker to the Portal (2/3)

③ You will see a list of all of the staff that ReServe has in our database for your organization.

Name	Position	Action
John Black	test	
David Somerset	test	
Richard Sterling	test	GRANT ACCESS

At the bottom of the list are two buttons.

④ Click **INVITE NEW** if you want to invite your co-worker to create a password so they can log in to the ReServe Portal.

You will need their name and email address.

**OR**

④ Click **ADD NEW W/O PORTAL ACCESS** if you want to add your co-worker to our database without inviting them to create a password in the ReServe Portal.

You will need their name, title, email address, work phone, and office address.

Continued  
in Part 3

# Add a Co-worker to the Portal (3/3)

## Send invitation to staff member for **Universal Exports**

First Name\*

James

Last Name\*

Stock

Email\*

jstock@unitedexports.com

SEND

⑤ If you clicked **INVITE NEW**, fill out the form with your co-worker's name and email address and click **SEND**. They will receive an email from ReServe with a link they can use to set a password for the ReServe Portal.

# OR

## Organization staff member registration

BIO Information

PRE James SR.

Stock

Preferred name

Journalist

Contact Information

555-555-5555

Mobile phone

jstock@universalexports.com

123 Main Street

New York

New York

10001

REGISTER

⑤ If you clicked **ADD NEW W/O PORTAL ACCESS**, fill out the form with your co-worker's information as indicated, then click **REGISTER** to add them to ReServe's database.

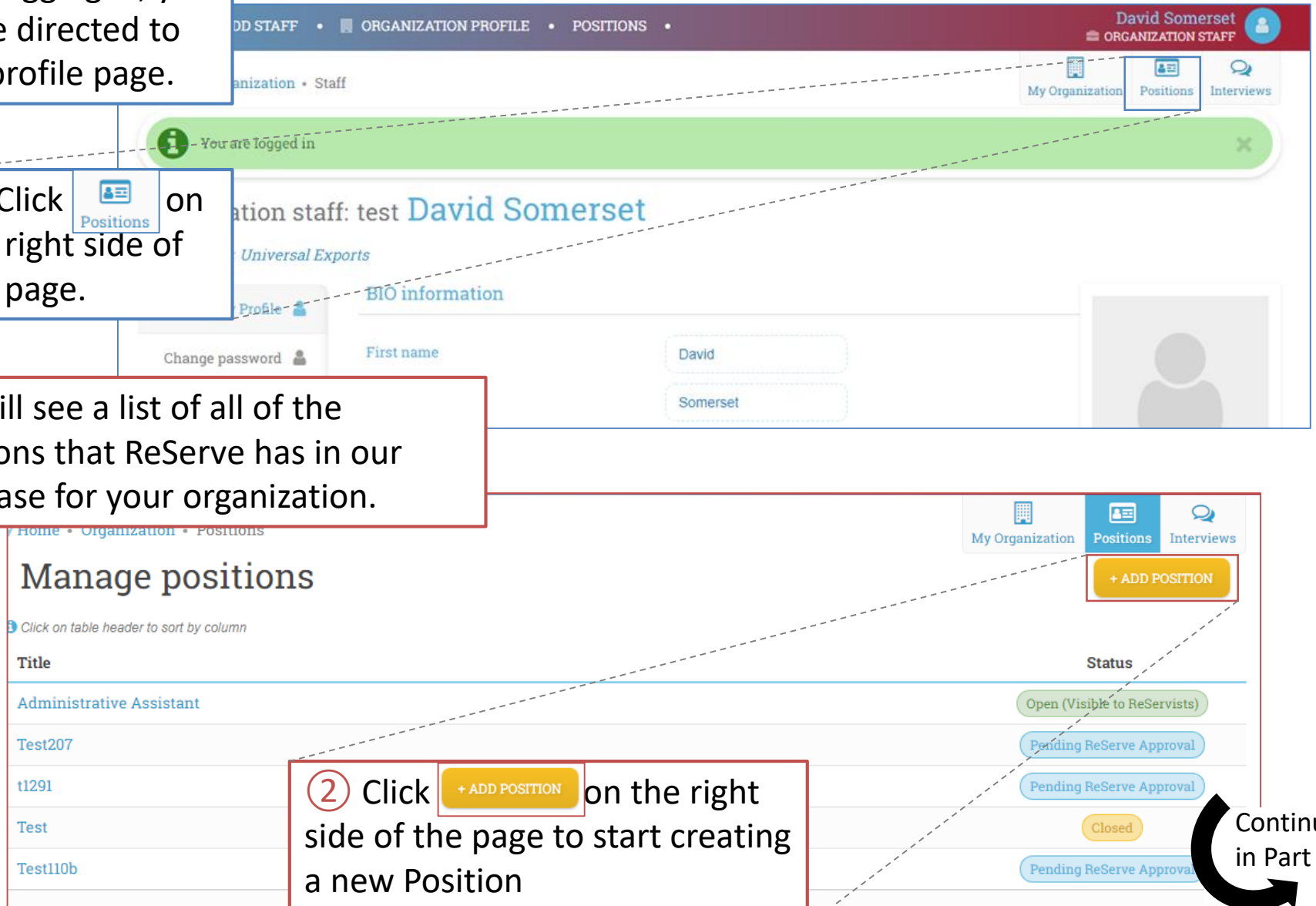
# List a Position with ReServe (1/3)

After logging in, you will be directed to your profile page.

① Click  on the right side of the page.

You will see a list of all of the positions that ReServe has in our database for your organization.

② Click  on the right side of the page to start creating a new Position



The screenshot displays the ReServe user interface. At the top, a navigation bar includes 'ADD STAFF', 'ORGANIZATION PROFILE', and 'POSITIONS'. The user's name 'David Somerset' and 'ORGANIZATION STAFF' are visible in the top right. Below the navigation bar, a green banner indicates 'You are logged in'. The main content area shows the user's profile for 'test David Somerset' at 'Universal Exports'. A 'Positions' menu item is highlighted in the top right. Below the profile, there are input fields for 'First name' (David) and 'Somerset'. The 'Manage positions' section is visible, featuring a table with columns for 'Title' and 'Status'. A '+ ADD POSITION' button is highlighted in a yellow box. The table lists several positions, including 'Administrative Assistant' and 'Test207', with various status indicators like 'Open (Visible to ReServists)', 'Pending ReServe Approval', and 'Closed'.

Title	Status
Administrative Assistant	Open (Visible to ReServists)
Test207	Pending ReServe Approval
t1291	Pending ReServe Approval
Test	Closed
Test110b	Pending ReServe Approval

Continued  
in Part 2



# List a Position with ReServe (2/3)

③ You will be taken to the “create new Position” form. Required fields are marked with \*.

Create new Position Pending

Please complete the following information about the Position you would like to fill with ReServe. Once you submit the Position, ReServe will review it. During this time, ReServe may reach out if additional information is needed. Once ReServe approves the Position, we will begin the searching for ideal ReServists to refer to you.

### Basic Info

Position Title\*

Department

Expected Duration (months) Expected Hours / Week

Expected Indefinite Duration (or over 2 years)

### Location of position

Work-site: Street Address\*

Work-site: City\*

-- State\* --

Work-site: ZIP\*

Work from Home

Nearby Public Transit Options (if any)

Parking Available

### Description\*

Using 300 characters or less, provide a short description of the Position, including what the Position will entail day-to-day. This description will be the first sense ReServists have of your Position.

Quick Description\* (300 char)

Describe the workplace culture.

Workplace Culture\*

-- Dress Code\* --

### Education



Indicate the minimum level of education the ReServist must have.

If there is a specific degree the Position requires (such as an MBA or MSW), please list it here.

### Skill Requirements\*

Add skill +

Choose which of the following skills the ReServist will need in this Position. If you would like, you may also indicate the minimum number of years of experience the ReServist should have.

Some sections have the  symbol. Clicking this allows you to create more space in the job for additional requirements. The  symbol allows you to remove the extra space you have added.

# List a Position with ReServe (3/3)

④ The last step is to choose the Designated Staff Contacts for this position. You can choose from among the organization staff who are already in the ReServe database, or you can click [Add Staff](#) to add a new person to the database. You will need their name, title, email address, work phone, and office address.

## Designated Staff Contacts

[Add Staff](#)

*Contact information from the Primary and Secondary Supervisors will be shared with the Employer of Record, NextSource, and it will be the Supervisors' responsibility to approve ReServist timesheets. If someone besides the Primary Supervisor is reviewing candidates, please designate them as the 'Other Resume Approver'.*

Primary Supervisor:\*

Secondary Supervisor:\*

Other Resume Approver:

-- Choose Primary Supervisor --


-- Choose Secondary Supervisor --

-- Choose Other Resume Approver --

⑤ Once all information about the Position has been completed, click [CREATE POSITION](#) at the bottom of the page.

[CREATE POSITION](#)

When your position is submitted to ReServe, you will be taken to the position page and you will see this message:

 Position saved. Wait for approval.

ReServe will review your position; you will be alerted if we choose to open your position and begin searching for a placement.

# Edit a Position with ReServe (1/2)

After logging in, you will be directed to your profile page.

① Click  on the right side of the page.



Organization • Staff

David Somerset  
ORGANIZATION STAFF

My Organization Positions Interviews

You are logged in

Organization staff: test David Somerset

Universal Exports

BIO information

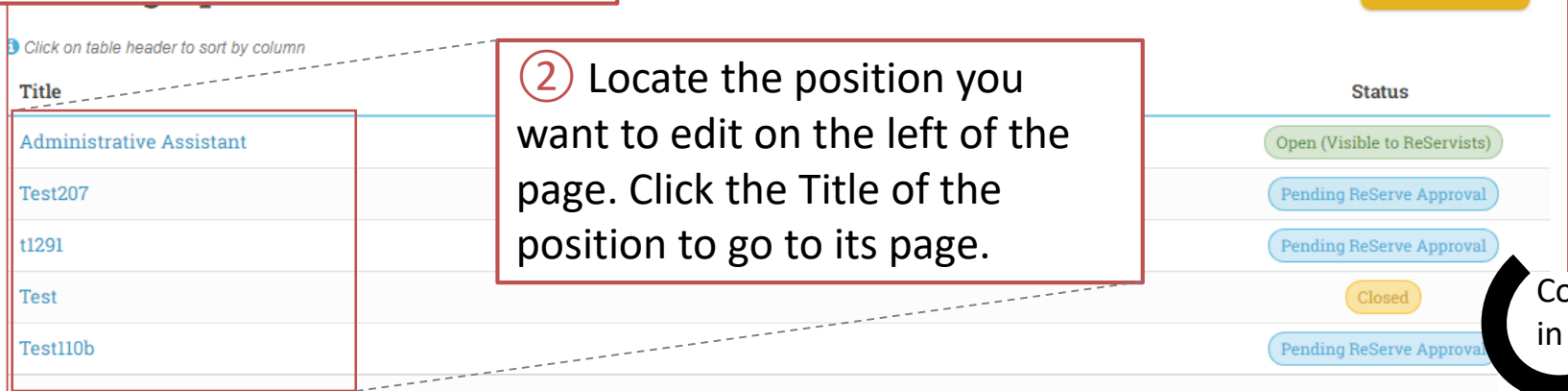
Change password

First name David

Last name Somerset

You will see a list of all of the positions that ReServe has in our database for your organization.

② Locate the position you want to edit on the left of the page. Click the Title of the position to go to its page.



Click on table header to sort by column

Title	Status
Administrative Assistant	Open (Visible to ReServists)
Test207	Pending ReServe Approval
t1291	Pending ReServe Approval
Test	Closed
Test110b	Pending ReServe Approval

+ ADD POSITION

Continued  
in Part 2

# Edit a Position with ReServe (2/2)

③ From the Position page, click **EDIT** to edit the position details.

Home • Organization • Positions • 8670

## Position: Administrative Assistant (Id: 8670)

Department: test  
Organization: Universal Exports

Information  
Submission  
Interview

Expected hours per week: 10  
Expected Duration (months): 10

Work from home

Description  
t  
Workplace Culture: t

EDIT

## Edit position Position

### Basic Info

Administrative Assistant

test

### Description

t

Location of position


Work from Home

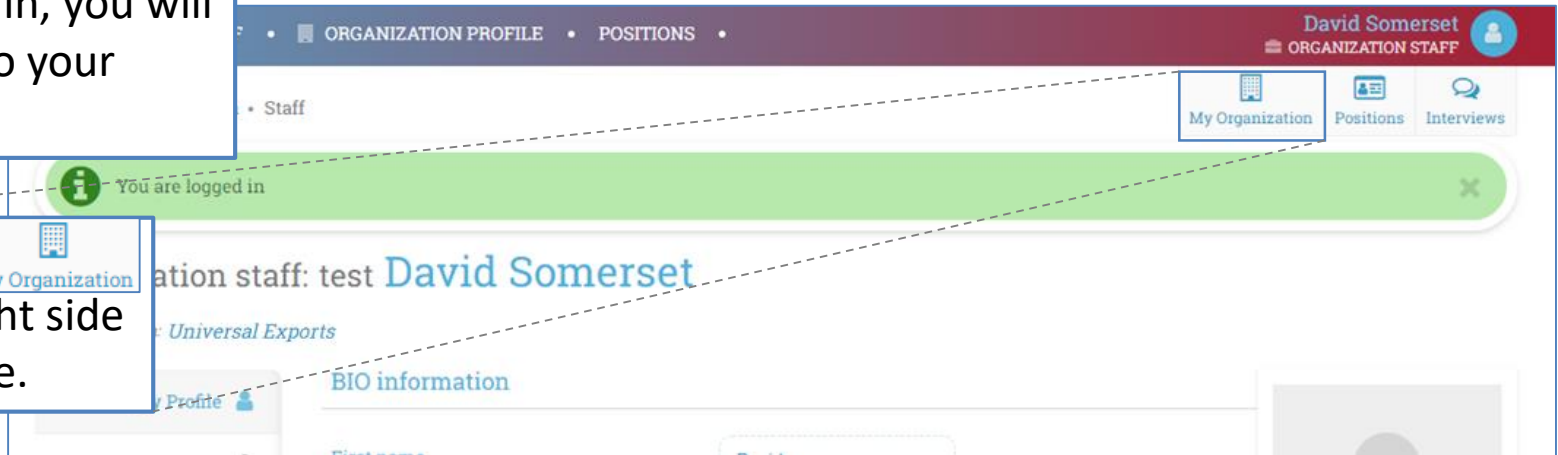
④ Replace the existing information to edit the position. Once you are finished, click **UPDATE POSITION** at the bottom of the page.


ReServe will review your position; you will be alerted if we choose to open your position and begin searching for a placement.

# Review Reservists (Resumes) (1/4)

After logging in, you will be directed to your profile page.

① Click  on the right side of the page.



② On the next page, click  on the left side of the page



# Review Reservists (Resumes) (2/4)

Organization Profile: Universal Exports

*About us: 1229 Final Test*

- Profile
- Positions
- Interviews
- Current Placements
- Staff
- Pending Submissions (2)

Pending submissions for position

- Administrative Assistant
- HR Consultant

③ Next, select your position from the list that appears.

## Position: Administrative Assistant (Id: 8670)

Open (Visible to ReServists)

EDIT

Department: test  
Organization: Universal Exports

Information

Submission

Interview

### Submission list

*Please check all submission users before sending to ReServe Staff*

Primary supervisor:  
David Somerset

Jean A. - **NEED ACTION** submitted on: 05/29/2018 1:37 pm

Download resume

Martin K. - **NEED ACTION** submitted on: 05/29/2018 1:37 pm

Download resume

< 1 >

*You must respond to all ReServists before you can submit your responses back to ReServe*

SAVE PROGRESS

SUBMIT TO RESERVE

④ You will see a list of candidates. To start, click **NEED ACTION** for the first candidate.

Continued  
in Part 3

# Review Reservists (Resumes) (3/4)

⑤ Review the credentials of the ReServist candidate here

You can download the resume here

The screenshot displays the 'Submission list' interface. On the left, a navigation sidebar includes 'Information', 'Submission' (highlighted), and 'Interview'. The main content area shows two candidate entries. The first entry is for 'Jimmy B.', marked with a 'NEED ACTION' warning and a submission date of '05/29/2018 1:37 pm'. A 'Download resume' button is visible next to his name. Below his name, a detailed view of his credentials is shown, including 'Top 5 skills' (Sales, Retail), 'Software skills', 'Education' (Communications at Manchester University), 'Licenses' (License A), and 'Languages'. The second entry is for 'Meredith K.', also marked with a 'NEED ACTION' warning and the same submission date. Below the candidate details, there is a section for 'Upcoming Availabilities (for Interview)' with a table of dates and times, and a 'Comments' section with a text input field. At the bottom of the interface, there are buttons for 'NOT INTERESTED' and 'INTERESTED', a 'SAVE PROGRESS' button, and a 'SUBMIT' button. A footer message states: 'You must respond to all ReServists before you can submit your responses back to ReServe'.

Day	Date	Morning	Afternoon
Friday	06/01	<input type="checkbox"/>	<input type="checkbox"/>
Monday	06/04	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	06/05	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	06/06	<input type="checkbox"/>	<input type="checkbox"/>
Thursday	06/07	<input type="checkbox"/>	<input type="checkbox"/>

Continued in Part 4

# Review Reservists (Resumes) (4/4)

⑥ After you have reviewed the ReServist, provide your response:

① (Optional) Indicate times you are available for an interview

② Leave a comment

③ Mark if you are *Not Interested* or *Interested*

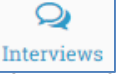
⑦ Once you have responded to *all* of the ReServists, click **SUBMIT TO RESERVE** to send your results back to ReServe. ReServe will contact you about the next step in the process.

The screenshot displays the ReServe Staff interface for reviewing resumes. At the top right, it shows the primary supervisor as David Somerset. The main content area shows two resumes: one for Jimmy B. and one for Meredith K., both submitted on 05/29/2018 at 1:37 pm. A yellow 'NEED ACTION' badge is present for both. The interface includes sections for 'Top 5 skills', 'Software skills', 'Education', 'Licenses', and 'Languages'. For Jimmy B., the skills listed are Sales (0 years 2 months) and Retail (0 years 1 month). The education section shows Communications from Manchester University, and the license section shows License A. Below the resume details is an availability calendar for the week of June 1st to 7th, with checkboxes for Morning and Afternoon slots. A 'Comments' section is also present with a text input field. At the bottom of the resume card, there are 'NOT INTERESTED' and 'INTERESTED' buttons. At the very bottom of the interface, there are 'SAVE PROGRESS' and 'SUBMIT TO RESERVE' buttons.



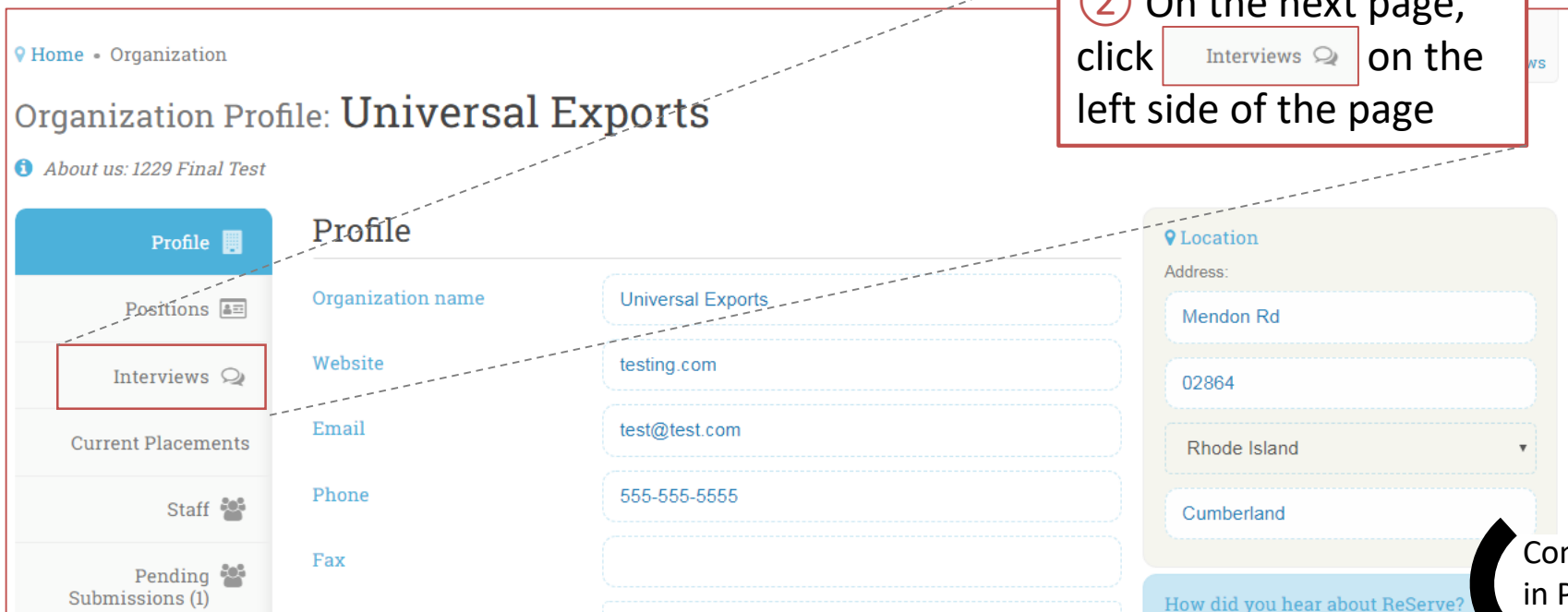
# Provide Interview Feedback (1/3)

After logging in, you will be directed to your profile page.

① Click  on the right side of the page.



② On the next page, click  on the left side of the page



Continued  
in Part 2

# Provide Interview Feedback (2/3)

## Organization Profile: Universal Exports

 About us: 1229 Final Test

Profile 

### Interviews

Upcoming

Recent

③ To view a list of interviews that were scheduled in the past, click **Recent** on the right side of the page.

--- Empty list ---  
There's no items in this area

## Organization Profile: Universal Exports

 About us: 1229 Final Test

Profile 

Positions 

Interviews 

Current Placements

### Interviews

Upcoming

Recent

30

May

10:05  
AM

Meredith K.  
13 Main Street  
New York, NC

overdue but not reacted



REACT!



02

May

2:20  
PM

Applicant new T.  
123 Main Street  
New York, NC

overdue but not reacted



Remember to ask  
about PowerPoint  
experience

REACT!



conducted and reacted



④ Locate the Interview you wish to provide feedback for, and click **REACT!**

Continued  
in Part 3

# Provide Interview Feedback (3/3)

⑤ In the pop-up window, use the drop-down options to indicate your rating of the ReServist in each of these areas.

The screenshot shows the 'Interview result' form for an interview that has occurred. At the top, there are two tabs: 'Interview Happened' (selected) and 'Interview Did Not Happen'. Below the tabs, the form is titled 'If Interview Happened'. It contains several drop-down menus for rating different areas: Work Experience, Licenses / Certific, Software Skills, Languages Spoke, Education, and Level of Professio. To the right of these menus is a 'Comments' text box. Below the comments box are two radio buttons: 'No' (selected) and 'Yes'. At the bottom of the form is a red 'SEND RESULT' button.

Then, indicate if you would like to hire the ReServist by clicking  No or  Yes. Then, click  to send your feedback.

ReServe will consider your feedback. If you indicated  Yes, we will reach out to set a Start Date.

## OR

The screenshot shows the 'Interview result' form for an interview that did not occur. At the top, there are two tabs: 'Interview Happened' and 'Interview Did Not Happen' (selected). Below the tabs, the form is titled 'If Interview Not Happened'. It contains a text box with the placeholder 'Type here a reason'. At the bottom of the form is a green 'SEND' button.

⑤ If the interview did not happen, click , type a reason into the comment box, and click  to tell ReServe.