



## **Agentic AI -Powered Candidate Screening POC Business Requirement Document**



## Version Control

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## 1. Executive Summary

This Business Requirements Document (BRD) outlines a Proof of Concept (POC) initiative aimed at automating the early stages of the candidate screening process through an AI-driven solution. The initial scope focuses on two critical areas: General Interview Questions and Initial Screening of candidate (Name, Email, highest education questions about resume (exp/education to ensure applicant meets the minimum eligibility requirements).

The objective of the POC is to demonstrate how conversational AI can engage applicants in a structured and consistent manner, while simultaneously capturing essential eligibility information and reducing manual effort for recruiters. Specifically, the system will assess communication style and response patterns, interpret varying expressions of agreement or disagreement, deliver pre-approved responses to candidate queries, and provide a consolidated report on the candidate response and decision made based on the responses.

Additionally, the AI will handle the screening workflow, including confirming candidate eligibility to work in the designated region, recording educational background, evaluating relevant experience, and applying predefined rules to classify applicants into preliminary role and school type categories.

By validating these foundational capabilities, the POC seeks to prove that AI can streamline early-stage interviews, deliver more consistent outcomes, and free recruiters to focus on higher-value activities. The broader end-to-end automation, encompassing deeper skill coding, regulatory requirements, and on boarding workflows, is intentionally reserved for Phase 2 once the POC demonstrates measurable accuracy and operational benefit.

## 2. Stakeholders

- **Business Stakeholders:** Recruitment leadership, HR, Compliance Team
- **Technical Stakeholders:** AI/ML Engineers Team
- **End Users:** Recruiters, Candidates (applicants)

## 3. Scope Statement (Phase 1 - POC)

### 3.1 In Scope (Phase 1 – Proof of Concept)

The POC will validate AI automation for the earliest stages of applicant engagement, focusing on:

#### General Interview Questions

##### 1. Interpretation of Varied Yes/No Responses

- a) The system can accurately decipher and normalize a wide range of affirmative and negative expressions (e.g., “Yes,” “Yep,” “Mhm,” “Correct,” or “No,” “Nah,” “Nope”).



- b) Based on this interpretation, the platform can automatically decide whether to **continue the interview flow** or **terminate the interaction** where eligibility criteria are not met.

## 2. Delivery of Stock Responses

- a) Recruiter-approved, standardized responses (“stock responses”) can be embedded into the system to ensure consistent communication with candidates.
- b) When a candidate poses a question covered by these pre-defined responses, the system will automatically deliver the appropriate reply.

## 3. Fallback Handling for Unanswered Questions

- a) If the system cannot answer a candidate’s question using the available stock responses, it will:
  - Provide the applicant with a professional “blanket statement” acknowledging the query (e.g., “Thank you for your question. A recruiter will follow up with you shortly.”).
  - Flag and record the unanswered question for recruiter attention.

## 4. Escalation of Unanswered Questions

- a) All unanswered or unrecognized candidate questions will be categorized, and marked separately to recruiters on the final report. This ensures recruiters are fully aware of unanswered candidate queries before engaging with the applicant directly.

## 5. Qualification of Experience

- a) The platform can be programmed with recruiter-defined rules outlining what constitutes **qualifiable experience** (e.g., classroom teaching, early childhood care, K–12 tutoring).
- b) It can then identify candidate experience, ask **follow-up questions** where clarification is required, and apply routing logic based on recruiter-approved thresholds.

## 6. Recruiter Feedback

- a) In cases where the AI rejects a candidate based on responses that recruiters would have otherwise advanced, the recruiter can provide the feedback and change the status.

## Candidate Screening and Role Mapping

1. Presenting a standardized introduction to the opportunity and confirming candidate interest.
2. Recording how applicants became aware of the organization.
3. Verifying availability to work in the designated geography, with appropriate stop rules for ineligible responses.
4. Capturing highest level of education attained and mapping it to minimum role requirements.
5. Identifying and classifying relevant experience across early childhood, K–12, and analogous settings.



6. For early childhood applicants, applying additional qualification checks (e.g., schedule flexibility, comfort with specific responsibilities) and routing them to appropriate role categories.
7. Producing structured outputs that assign a preliminary position type and school type, which can be reviewed and confirmed by a recruiter.
8. This scope ensures the POC demonstrates measurable efficiency and accuracy in while establishing a clear foundation for subsequent phases of automation.

### 3.2 Out of Scope (Reserved for Phase 2)

The POC will not include:

- Feedback Loop: Allow recruiters to review AI outputs and provide corrections that can improve future accuracy.
- Assessing candidate communication style through tone, inflection, pacing, and clarity.
- Applying real-person validation to reduce the risk of bot or non-genuine interactions.
- Validating whether experience claimed is documented on the resume, and flagging applicants for “on-hold” review when supporting documentation is missing.
- Advanced skill and subject coding.
- Candidate rating scales or evaluator scoring.
- Pay-rate communication.
- Collection of regulatory requirements (e.g., fingerprinting, references).
- Recommendation workflows, hiring status updates, or on boarding steps.
- Direct ATS/HRIS integrations beyond simple export or recruiter handoff.

## 4. Current State Analysis (As-Is)

Recruiters manually screen applicants by asking general concept questions, interpreting tone/grammar, and verifying acceptable experience. This process is time-consuming, subjective, and inconsistent across recruiters.

## 5. Proposed Future State: Functional Flow (To-Be, Phase 1)

### 5.1 Login & Interview Access Module:

Each candidate is provisioned with a **unique username and password**, issued by the recruiter along with a secure interview link. The candidate accesses the interview by clicking the link and authenticating with the assigned credentials. Once authenticated, the candidate is directed to the web-based interview portal. Upon entry, the system will request microphone access. When enabled, the AI Recruiting Assistant begins the session, capturing the candidate’s voice input in real-time.

As the interview progresses, live transcription will be displayed on the screen, allowing the candidate to see the conversation text stream continuously. The transcription is logged and stored in the system database for compliance, reporting, and recruiter review.

Session handling ensures that each credential set is **exclusively linked to a single candidate** and automatically expires once the interview is completed or the session times out. The Candidate can resume mid-session if dropped. The login credentials will be active for 1 Hour time period from the time of log in.



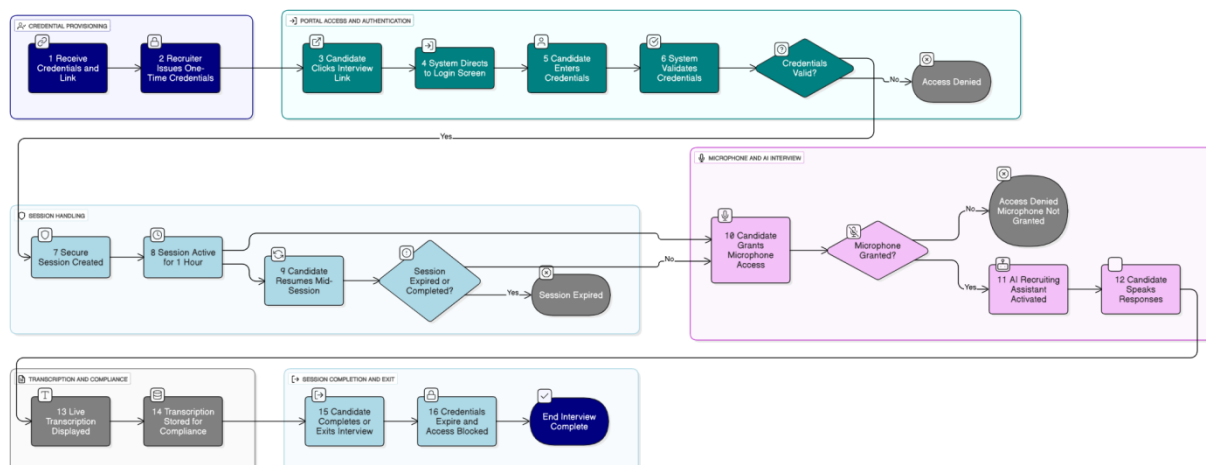
Step	Candidate Action	System Behavior	Outcome/Decision	Data captured & Notes
1	<b>Receive Credentials &amp; Link</b> – Candidate is provided with a unique username, password, and secure interview link from recruiter.	System provisions a one-time credential set tied to a specific candidate.	Candidate prepared for login.	Username, password, interview link, provisioning timestamp.
2	<b>Access Interview Portal</b> – Candidate clicks the secure link.	System directs to login screen for authentication.	Candidate prompted to enter credentials.	Access attempt log, candidate ID, link validation.
3	<b>Authenticate with Credentials</b> – Candidate logs in using assigned username and password.	System validates credentials; credentials active for 1 hour from first login.	Successful login → candidate allowed into portal.	Login timestamp, session ID, authentication result.
4	<b>Session Handling</b> – Candidate session is initialized.	Each credential set is tied to one unique candidate; session auto-expires after completion, timeout, or credential expiry. Resume supported if session drops mid-interview.	Secure session established.	Session logs, timeouts, resume attempts.
5	<b>Microphone Permission</b> – Candidate grants microphone	System requests device access.	AI Assistant activated if permission granted; otherwise interview cannot	Audio permission status.





	access		proceed	
6	<b>AI Session Start</b> – AI Recruiting Assistant initiates interview.	System begins capturing candidate's voice in real-time.	Interview session begins.	Voice input streams, audio capture logs.
7	<b>Live Transcription</b> – Candidate speaks responses.	Real-time transcription displayed on screen continuously for candidate visibility.	Candidate and recruiter (if viewing later) see conversation text.	Transcription text, timestamped logs.
8	<b>Session End</b> – Candidate completes or exits interview.	Credentials expire after completion or 1-hour login window.	Session closed; further access blocked.	End time, closure type (completed/timeout/expired).

## Functional Flow Diagram: [Candidate Login Flow.png](#)



## 5.2 The AI Module for screening and decision making:

The candidate screening flow outlines the **step-by-step process** followed by the AI Recruiting Assistant during the initial applicant interaction. The flow begins with a **scripted introduction** and confirmation of candidate interest, then progresses through key eligibility checkpoints including **geographic availability, education level, and relevant experience**.





For applicants eligible for early childhood roles, the system applies **additional qualifiers** such as schedule flexibility and willingness to handle specific responsibilities. Based on these structured inputs, the AI generates a **preliminary classification** by assigning a **Position Type** (e.g., Teacher, Assistant Teacher, Tutor) and a **School Type** (e.g., UPK Program, Charter School).

At each decision point, the platform applies clear rules for **continuing, stopping, or routing** the interview, ensuring a consistent and compliant process. The flowchart provides recruiters with **transparent visibility** into candidate pathways, while enabling efficiency and accuracy in early-stage screening.

Step	Action Name	System Prompt	Candidate Expected Responses	System Decision	Data Captured
1	Introduction & Fit	Welcome message + ask if role matches interest	Yes / No	Yes → continue; No → exit	Interest confirmed
2	Source of Awareness	How did you hear about us?	Referral / Job Board / Social / Other	Record answer and continue	Referral source
3	Location / Work Eligibility	Can you work in New York City?	Yes / No / Relocating	Yes → continue; No/Relocating → stop & advise reapply	Location eligibility
4	Education Level	What is your highest completed education?	HS / Associate / 60+ credits / Bachelor / Master / Doctorate	Record and use for role mapping	Education level
5	Experience with Learners	Do you have experience in classroom or similar?	Yes / No; if Yes → Early childhood / K–12 / Higher-ed	No → stop; Yes → record categories and continue	Experience types
6	Early Childhood Qualifiers	If early-childhood: Are you open to UPK hours? Comfortable with diapering?	Yes / No combinations	Apply UPK rules (hours & diapering) to determine eligibility	UPK eligibility details
7	Confirm Contact details	Pop up to enter email id and	Email Id and Phone no.	Record the Email Id and Phone no.	Email Id and Phone no.



		Phone no.			
8	Ask for any follow up questions from the candidate	Do you have any questions?	Yes, No or Any follow up question	Respond with Stock response.	Flag the candidate and record the question in the transcript.
9	Preliminary Coding	System evaluates recorded inputs	Derived	Assign preliminary Position & School Type.	Position type, School type

## 5.2.1 Position Type Mapping

Based on **education level** and **experience type**, the AI should classify into one of six categories:

Position	Minimum Education	Experience Requirement	Notes / Exceptions
Teacher	Bachelor's or higher	≥3 months PreK–12 classroom or early childhood (≤5 years)	Transfer schools may require 9–12 experience
Substitute	Bachelor's or higher	≥3 months PreK–12 or early childhood	Same degree threshold as Teacher
Assistant Teacher	Associate / 60+ credits	≥3 months with students in classroom or similar	Early childhood centers may accept HS + experience
Tutor	Bachelor's or higher	≥3 months tutoring or teaching PreK–12	1:1 or small-group focus
UPK Teacher	Bachelor's or higher	≥3 months with children ≤5 years in classroom/analogous	Must also meet UPK hours & care-task qualifiers
Teacher Aide	High School diploma or equivalent	≥3 months with children ≤5 years	Entry-level support role

## 5.2.2 School Type Mapping

Once the **Position Type** is determined, **School Type** is assigned based on eligibility:

School Type	Key Eligibility Factors	Notes
UPK Program / Early Childhood Center	Early-childhood experience; UPK hours accepted; diapering accepted	For candidates focused on age ≤5
Charter School	K–12 experience; degree	Standard K–12 placement



	depends on role	
<b>Transfer School</b>	Experience with grades 9–12; Bachelor's or higher	High-school/older experience pathway
<b>Charter — High Needs (Future)</b>	K–12 experience + classroom management or special education exposure	Phase 2; requires additional evidence
<b>Private School (Future)</b>	Strong credentials and high performance rating	Phase 2; assigned after expanded metrics

### 5.2.3 Combined Decision Flow Example

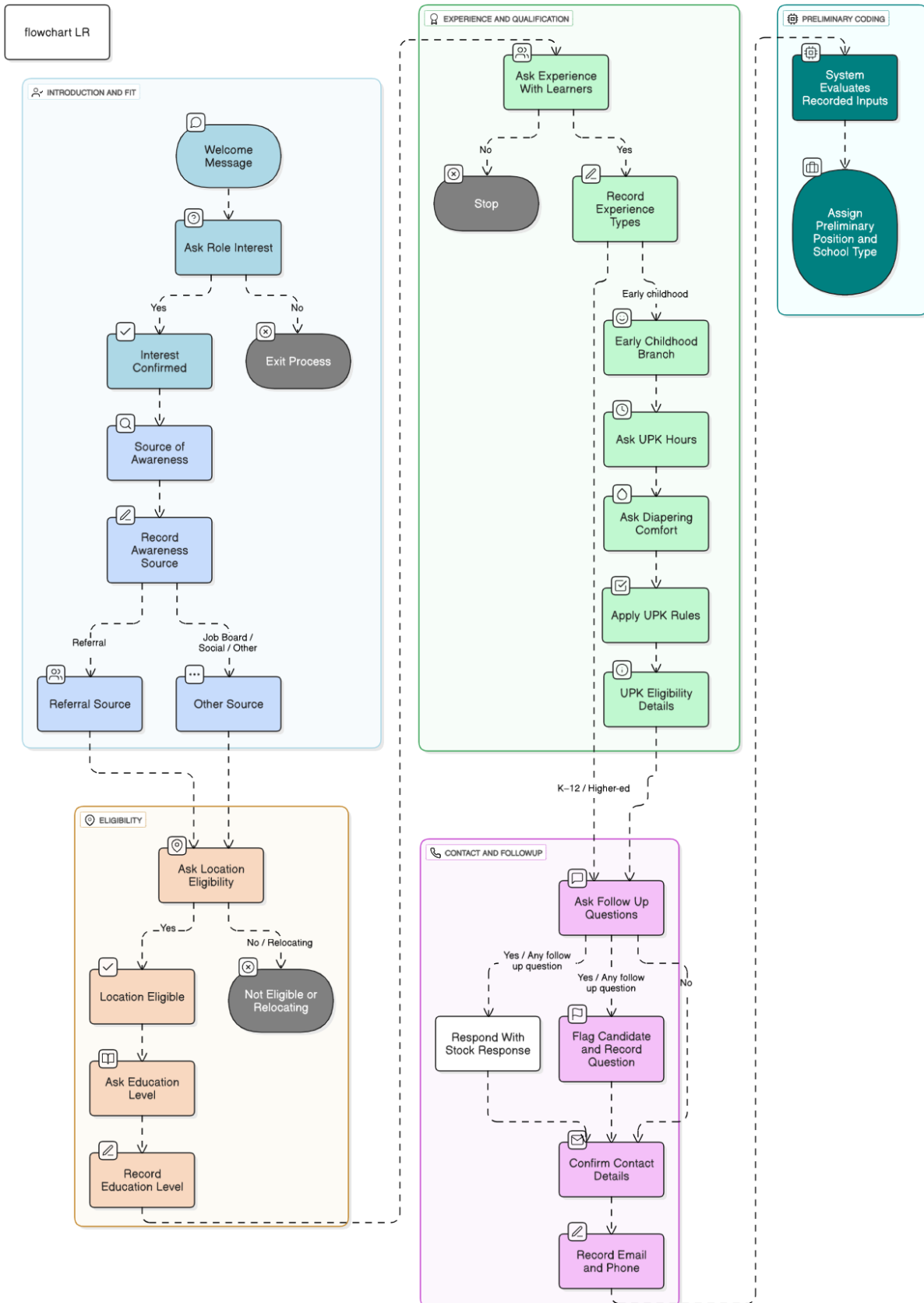
#### Case A:

- Bachelor's degree
- 6 months in a PreK classroom
- Open to UPK hours & diapering → **Position Type: UPK Teacher | School Type: UPK Program/Early Childhood Center**

#### Case B:

- Associate's degree (60+ credits)
- 4 months experience in 9–12 classroom
- Not open to diapering → **Position Type: Assistant Teacher | School Type: Charter School**

**Functional Flow Diagram:** [AI Module.png](#)





### 5.3 Admin/Recruiter Portal:

While AI module handles structured interactions; the recruiter flow ensures accountability, compliance, and decision-making authority, the recruiter portal serves as the **control hub** for human recruiters to review, validate, and act upon AI-collected candidate data in the AI module. Recruiter Portal Core Capabilities are:

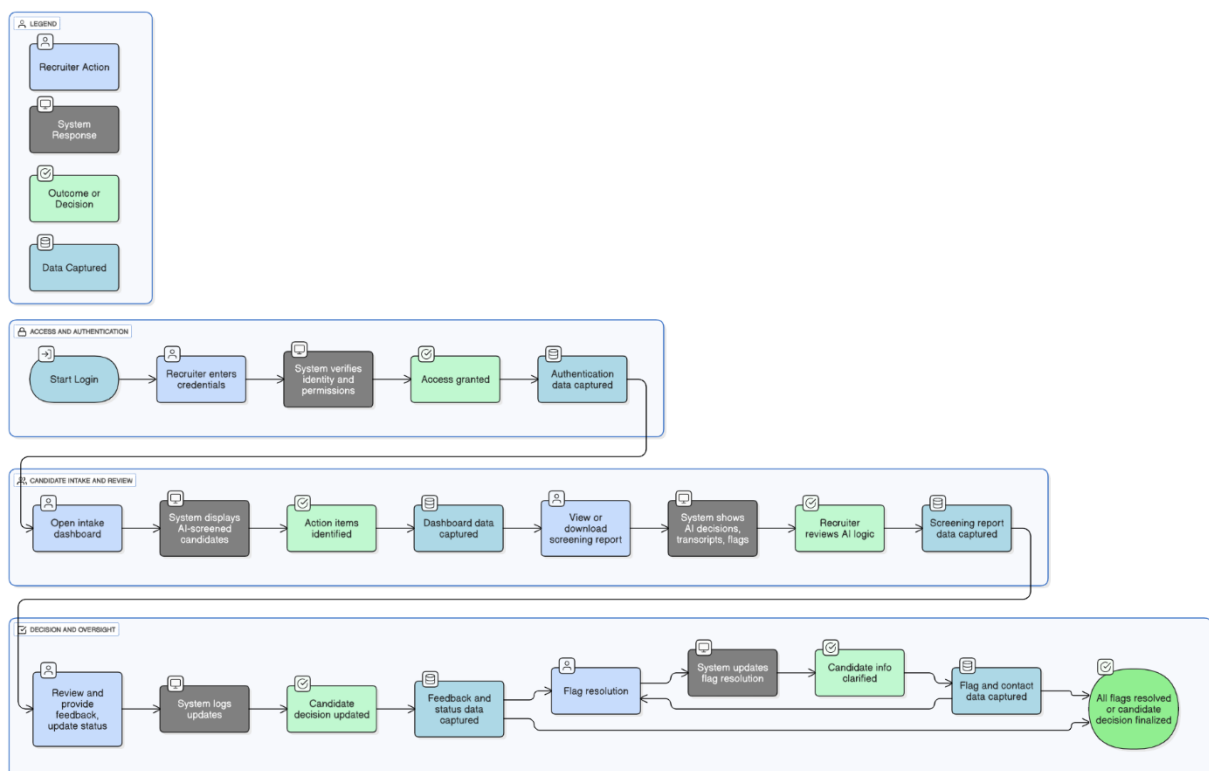
- **Secure Authentication:** Exclusive login controls ensure only authorized recruiters access the system.
- **Candidate Record Management:** Recruiters can access detailed candidate profiles, including - AI-collected responses (education & experience), Screening outcomes (eligibility checks, role mapping, borough preferences) and Interview transcripts.
- **Search & Retrieval:** Candidate search available by name, email, registration ID or status.
- **Status Tracking:** The AI module will assign the status as Selected or Rejected. For selected candidates it will give a role and school type mapping in the report.
- **AI Screening Review:** Recruiters validate the AI's screening logic and review the generated report and recommended role and school type. The recruiter will be able to provide a feedback and change the status of the candidate.
- **Export & Reporting:** Generated candidate summaries and decisions in the form of reports can be downloaded in standardized formats (DOCX).

Step	Function	Recruiter Action	System Response/Behavior	Outcome / Decision	Data Captured
1	Login & Authentication	Recruiter signs in with secure credentials	System verifies credentials, applies role-based permissions and opens recruiter workspace	Access granted with appropriate privileges; session started	User ID timestamp, auth method, session ID
2	Open intake dashboard	Recruiter opens the AI-screened candidates list	System displays a table with candidate name, email, screening time, current status(selected or rejected), flag indicators and action buttons (View / Download / Feedback)	Recruiter gets an overview and identifies items needing attention	Dashboard snapshot, filters applied, last refresh time
3	View/Download screening report	Recruiter clicks a candidate row or action (View / Download )	System shows transcript, assigned position & school type, decision trace and any flags or	Recruiter inspects evidence and AI reasoning before	Transcript text, assigned role, assigned



			notes	deciding next steps	school type.
4	Review, Give Feedback & update status	Recruiter reviews the report and provides feedback comments and change status if the AI screening is incorrect.	System captures the feedback points and updates the status as entered by the recruiter.	Updated Status	Feedback and Updated status of the candidate
5	Flag resolution	Recruiter addresses flagged items (ambiguous answers, unanswered questions) by contacting the candidate.	System shows the flag status on the dashboard	Flag cleared recorded	Flag cleared sign recorded

## Functional Flow Diagram: [RecruiterFlowDiagram.png](#)





## 6. Non-Functional Requirements (POC)

The system should also meet the following expectations:

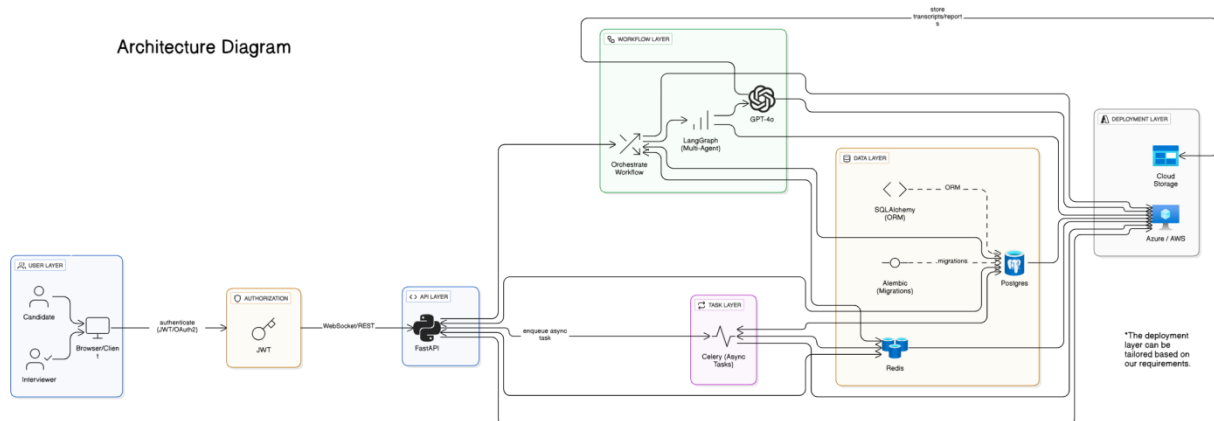
- **Accuracy**
  - Must correctly interpret at least 90% of “yes/no” variants and education/experience inputs.
- **Consistency**
  - Deliver the same scripted introduction and screening process across all applicants.
- **Usability**
  - Provide clear and professional prompts to candidates, minimizing confusion.
- **Reliability**
  - Ensure interview sessions can be completed without interruption or system errors.
- **Transparency**
  - Clearly log decisions (e.g., why a candidate was stopped).
- **Data Handling**
  - Store only necessary candidate data, following privacy and compliance standards.

## 7. Proposed Tech Stack & Tech Architecture (POC)

<b>Workflow Engine</b>	LangGraph
<b>Large Language Model (LLM)</b>	OpenAI GPT-4o
<b>Database</b>	PostgreSQL
<b>Temporary Data Store</b>	Redis
<b>Backend Framework</b>	Python
<b>API Framework</b>	FastAPI (for REST APIs and WebSocket connections)
<b>ORM</b>	SQLAlchemy (for database interaction)
<b>Database Migration Tool</b>	Alembic
<b>Task Queue / Asynchronous Processing</b>	Celery
<b>Deployment Environment</b>	AWS / Azure

Architecture Diagram: [architecture diagram.png](#)





## 8. POC Deliverables

### 1. AI Interview Flow

- A working conversation flow that covers the scope points in order to do the initial screening of the candidate.

### 2. Candidate Data Capture

- Structured collection of education, experience, availability, and early childhood qualifiers.
- Normalized responses for yes/no and other variations.

### 3. Preliminary Classification

- Automated assignment of a preliminary Position Type and School Type based on screening logic.

### 4. Recruiter Handoff Package

- A concise summary of each applicant, including captured data, decision points like the role and school type and list of unanswered questions by candidate.

### 5. Reporting Dashboard (Basic)

- Simple tracking of candidate name, sessions & outcomes for recruiter review in the downloadable format.

## 9. Objectives & Success Criteria (POC)

- **Objective:** Reduce recruiter time by automating early screening while preserving quality and compliance.
- **Key POC success metrics (indicative):**
  - $\geq 95\%$  accurate **yes/no** detection across variants (yep/nah/mhm/etc.).
  - $\geq 90\%$  correct NYC commutability gating and hold/reapply messaging.
  - $\geq 90\%$  precision on **UPK vs K-12** eligibility and UPK qualifiers application.
  - 100% capture of **highest education** and **experience** with correct routing when needed.



## 10. Assumptions, Constraints, Dependencies

### 10.1 Assumptions

1. **Limited ATS Integration:** The AI system will not update any other ATS/HRIS directly. Instead, outputs will be made available via export files or recruiter handoff summaries.
2. **Pre-Approved Content:** All candidate-facing scripts (welcome messages, eligibility questions, reapply messages, and UPK qualifiers) will be reviewed and approved by the team prior to POC go-live.
3. **Candidate Pool for Testing:** The POC will be tested primarily with an internal or controlled candidate pool before extending to actual live applicants. This ensures feedback and adjustments can be made in a low-risk environment.
4. **UPK and Commutability Rules:** Screening rules (such as UPK eligibility criteria, NYC commutability requirements, and stop/continue logic) are defined and fixed as documented. Recruiters agree these rules represent the current minimum requirements.
5. **Feedback Mechanism:** Recruiters will actively participate in providing structured feedback on AI decisions and corrections, which will form the basis for training improvements.
6. **Data Privacy Compliance:** Candidate data collected during the POC will be limited to what is necessary for screening and will comply with internal data retention and privacy policies.
7. **Language Scope:** The POC will be limited to English-language interactions only. Multi-language support is reserved for later phases.
8. **Candidate Responses:** It is assumed that candidates will provide responses in good faith and within the normal range of expected conversational variations (e.g., "yep", "nah", "uh-huh"). Extreme edge cases (e.g., sarcasm, code-switching, incomplete messages) may not be fully supported.
9. For the POC purpose the interview link and the login credentials will be shared by the recruiter to the candidate.

### 10.2 Constraints

1. **Scope Limitation:** Phase 1 is restricted to **General Questions** (Part 1) and **Step 1: Initial Screening & Resume Verification**. Below are the excluded points -
  - a. Assessing candidate communication style through tone, inflection, pacing, and clarity.
  - b. Applying real-person validation to reduce the risk of bot or non-genuine interactions.
  - c. Validating whether experience claimed is documented on the resume, and flagging applicants for "on-hold" review when supporting documentation is missing.
2. **Regulatory Requirements:** Compliance-related processes (EEOC validation, reference checks, fingerprinting, etc.) are not part of this POC. The system is to be used only in internal testing or pilot environments until compliance alignment is complete.
3. **Minimal Personalization:** Candidate interactions will be primarily rule-driven and will not include deeper personalization such as adaptive questioning based on sentiment or prior history.
4. **Limited Data Integration:** The POC will not pull data from or write data into enterprise systems beyond basic export/import functionality.



5. **Technology Limitations:** The POC will rely on the capabilities of the chosen LLM (OpenAI GPT-4o) and supporting services. Performance, accuracy, or interpretive limits of the AI cannot be exceeded by system configuration alone.
6. **Recruiter Dependency:** Recruiter review and override remain critical. AI outputs are advisory in nature and will not replace human decision-making in Phase 1.
7. **Testing Environment:** The POC will initially operate in a cloud sandbox/staging environment and may not reflect full production performance.

### 10.3 Dependencies

1. **Cloud Infrastructure:** A stable and secure cloud environment (AWS or Azure) must be provisioned with the necessary compute, storage, and networking capacity to host the POC.
2. **Recruiter Involvement:** Recruiters need to actively participate by testing the AI flow, validating results, and providing timely feedback to refine the system.
3. **Approved Scripts and Content:** All candidate-facing questions, responses, and routing rules (e.g., UPK qualifiers, commutability checks) must be reviewed and approved before implementation.
4. **Technical Team Support:** AI/ML engineers, backend developers & Support engineers must be available to configure, deploy, and maintain the system during the POC.
5. **Business Sponsorship:** Continuous backing from HR and recruitment leadership is required to ensure the project stays aligned with business goals and receives the necessary attention and resources.
6. **Training and Feedback Data:** Historical recruiter insights and ongoing candidate interactions are needed to train, fine-tune, and improve the AI's accuracy.
7. **Candidate Participation:** A sufficient number of test candidates (internal or external) must engage with the AI during the POC to generate meaningful results.
8. **Third-Party Service Reliability:** The POC depends on the availability and performance of external services such as OpenAI GPT-4o, Redis, and PostgreSQL. Any downtime or limitations may directly affect outcomes.
9. **Process Alignment & Change Management:** Recruiters and HR teams must align on updated processes for using AI in screening, and be open to adopting new workflows supported by the system.

## 11. Risk Management (POC Scope)

### 1. Risk: Misclassification of Candidate Experience

- The AI may incorrectly interpret or classify valid candidate experience due to ambiguous phrasing, unconventional role descriptions, or limitations in training data.
- **Mitigation:** Provide recruiters with the ability to override AI classifications in real time. All overrides will be logged and fed back into the AI's learning process, ensuring continuous improvement and reduced error rates over time.

### 2. Risk: Candidate Perception of AI as Impersonal

- Candidates may feel that the interaction lacks a “human touch,” which could negatively impact their perception of the organization or discourage them from completing the process.
- **Mitigation:** Incorporate warm, conversational introductions, recruiter-approved empathetic stock responses, and clear transition points where the candidate knows when



to expect recruiter follow-up. This helps maintain professionalism while preserving a more human experience.

### 3. Risk: Regulatory and EEOC Compliance Gaps

- Since the POC does not include formal compliance validations (e.g., EEOC, anti-bias checks), there is a risk that the process could be misinterpreted as non-compliant if used externally.
- **Mitigation:** Limit the POC strictly to controlled internal testing environments and pilot groups. Clearly document scope exclusions and ensure Phase 2 includes compliance integration before wider rollout.

### 4. Risk: Ambiguity in Candidate Responses

- Candidates may provide unclear, incomplete, or non-standard responses (e.g., “maybe,” “depends on the situation”), leading to potential misinterpretation by the AI.
- **Mitigation:** Implement structured re-prompting logic to confirm ambiguous answers. Provide recruiters with transcript snippets for manual review, ensuring no candidate is prematurely disqualified based on unclear responses.

### 5. Risk: Automatic Speech Recognition (ASR) Errors

- The AI may misinterpret names, boroughs, or other proper nouns due to speech recognition limitations, leading to inaccurate records.
- **Mitigation:** Incorporate spelling confirmation mechanisms, repeat prompts where necessary, and allow candidates to correct recognized information before final submission.

## 12. Phase 2 Scope (Future Expansion)

- Assessing candidate communication style through tone, inflection, pacing, and clarity.
- Applying real-person validation to reduce the risk of bot or non-genuine interactions.
- Validating whether experience claimed is documented on the resume, and flagging applicants for “on-hold” review when supporting documentation is missing.
- Full recruiter workflow automation (Steps 2 & 3).
- Calendar scheduling and recruiter availability.
- Reference checks, fingerprinting, and compliance integration.
- Advanced reporting and analytics.
- Multi-language support.

## 13. Glossary & References

- **POC:** Proof of Concept
- **ASR:** Automatic Speech Recognition
- **EEOC:** Equal Employment Opportunity Commission
- Source: *Recruiter Interview Process Document (3.5.25)*