

Admin Backend

After this you click on candidate and all of the candidates documents should pop up. The expiring ones should be marked red, yellow, green. For Expired, Expiring, good standing.

Add a (sort) drop down to sort by expired. Add a (search bar) to find specific document.

Separate the documents by Section:

The sections we will include are:

- General (Personal information, skill lists)
- Professional (Work history, education, references)
- Credentialing (expiring documents / Continuing education)
- compensation (w2, 1099, I9 forms)
- Applications: (Packets they submitted)

*Email notifications should come to specific email everytime someone submits a document (I'll create a new email for this and all others)

Other features:

[Status] (How we let candidates know we looked at their forms and approved them)

- Be able to mark a document incomplete. (red) (Added comment)
- Be able to approve document (green) (good standing)

[Expiring]

- Mark (Green) for in good standing
- Mark (Yellow) for expiring within 30 days
- Mark (Red) for EXPIRED

[Selection] (Packet Creation) Position documents in a packet

- Select documents and place them into a packet format so candidates can fill them out in application format.
- Applications, (If they already filled out a page they can replace the page on the application with the one that is already filled out) (Not sure if needed)
- 1,2,3,4 or drag and drop position of document in order. (or drag and drop position) then click okay (create packet)

[Adding documents] (how we add blank documents)

- Add blank documents by section (So its easy for candidates to find them) and fill out (pdf and html)
- Add application packets by profession (that we make) assign a profession to the application.

[History section] (How we save submitted pages so that they can't be altered) (this is for accreditation, and our files)

- Include a history section where old documents will live. We can send documents to a candidates history section so that we save copies.

Candidate Pages document section Features

[Upload documents] (Document uploader for pdf forms that they submitted) (not the ideal way but its good to have both)

- Document uploader for pdf formatted pages (I dont recommend but some prefer this?)
- Able to find Html application for profession easily.
- Able to easily sort documents
- Include history section for all documents uploaded.

[Filling out documents]

- **Fill out documents in html format.**
- **Save progress of document automatically (come back later to fill out)**
- **Able to save the completed application if they want a copy. (Save button)**

[Expiring documents]

- **They can see which credentials are about to expire by color coded system.**
- **They can get notified (alerted) of expiring documents at 30 days out (or whatever they set)**
- **update and submit the new dated certification easily.**
- **Update continuing education documents, with their new approved hours. (Every state has a different amount of hours so ill get the list so we can put a link and they can make sure they have enough)**

[Documents]

- **When documents are submitted in application format. These need to be separated so they can fill them out separately if they want to fix something. (expirations)**
- **This will automatically fix in the saved application via unique identifier. (If possible) meaning they can resubmit their completed application for new opportunities.**
- **All pages should have unique identifiers so that if they change something and submit it changes in all formats.**
- **Only after pushing (resubmit) will it send to us a new copy of their application or the updated certifications or forms. If they resubmit they will see that they submitted in their history section.**

Each submit locks in a new (history, and new completed document identifier) This means that when they submit the copy we receive can not be altered. The copy we have will go to their history. and our documents section for the candidate. (we also have a history section)

- **History is created for each submitted document. Not for saved or in progress only for (submitted) these are completed forms.**

