Hire★Vue

Quarterly Product Release

January 2025

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T2O Multiple Data Retention Policies per Application

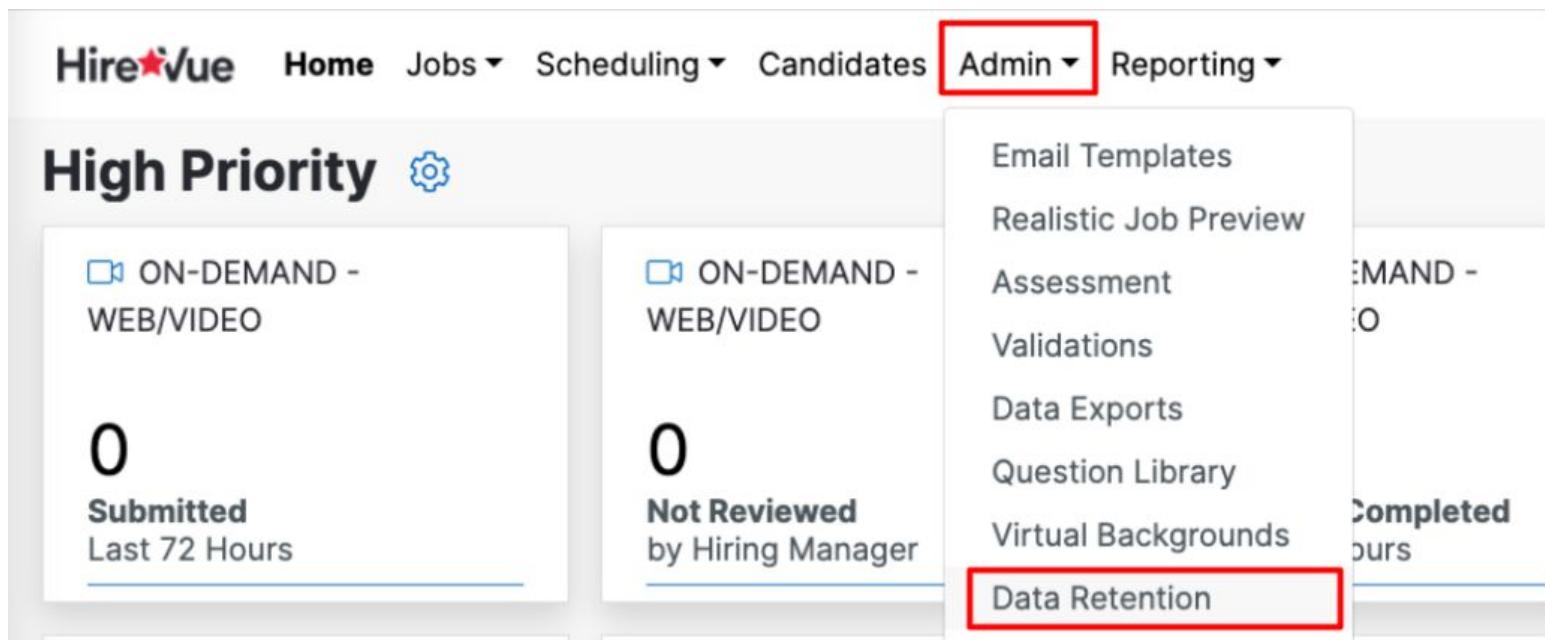**Feature release type:** Public **Available February 13th**

What are we improving: We have added the ability to enable custom deletion policies within a T2O application. This will allow for a customer to set at the job template/job level which deletion policy should apply to the interviews/candidates associated with the job.

Why is this feature/functionality valuable: Currently if a customer has different deletion policies by region, then they would need to have multiple applications to support. Which leads to longer implementation timelines, and more administrative upkeep for both the customer and internal resources. It also complicates reporting. Additionally, in some regions in EMEA the deletion policies can change somewhat frequently. Allowing the customer to have self-service capabilities for their deletion policies can help them manage these changes more efficiently.

How to access and configure:
If you are interested in activating this feature, please reach out to your Customer Success Director to have this feature enabled for your account. There is no additional charge to leverage this feature.
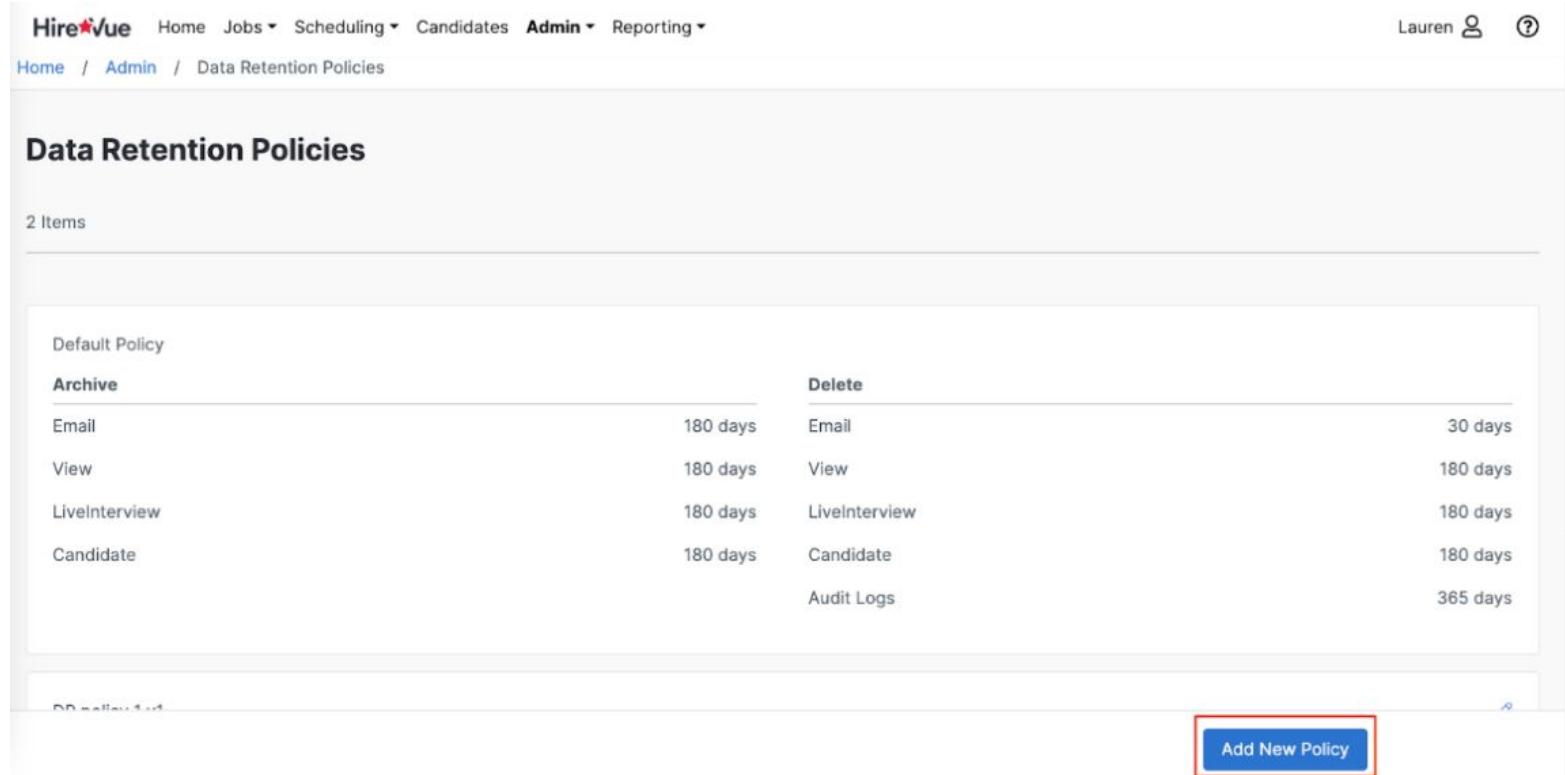
Once the licensing option has been configured to enable this feature, the Customer Admin will now have a new menu available under Admin for Data Retention.

T2O Multiple Data Retention Policies per Application (cont.)

From the Data Retention tab, the Default Retention policy is viewable but not editable. Any existing custom policies will be editable from this page. To create a new custom policy, the customer admin will select Add New Policy.
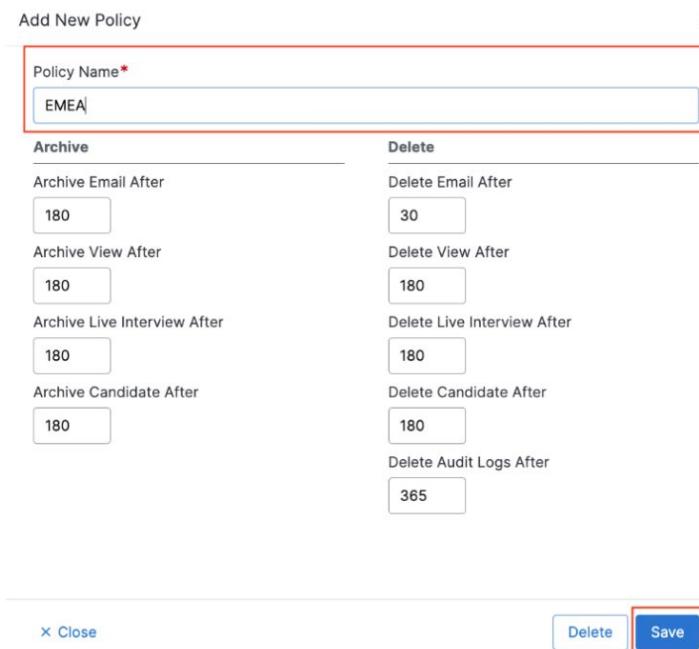

From the menu, the default policy settings will be filled in, and can be edited to meet the custom policy names. The custom policy is given a name that users will see on the Job Template and Job levels.
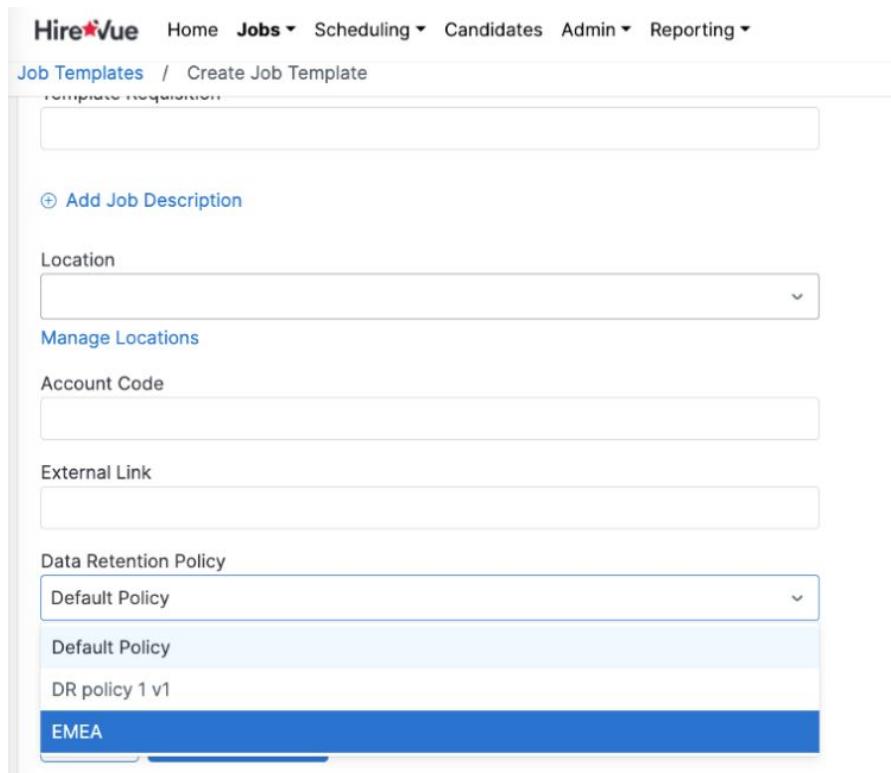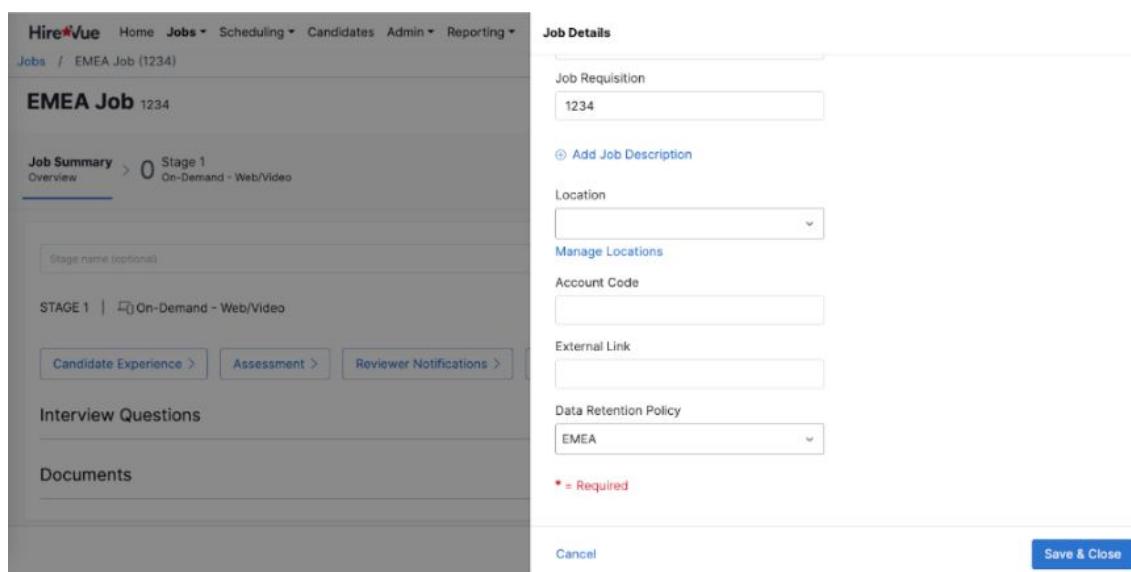
T2O Multiple Data Retention Policies per Application (cont.)

When creating or editing a Job Template, under the job details section, if there is at least 1 custom policy active, there will be a drop down to select the Data Retention policy that will apply to all interviews associated with the job that is created from the Job Template.
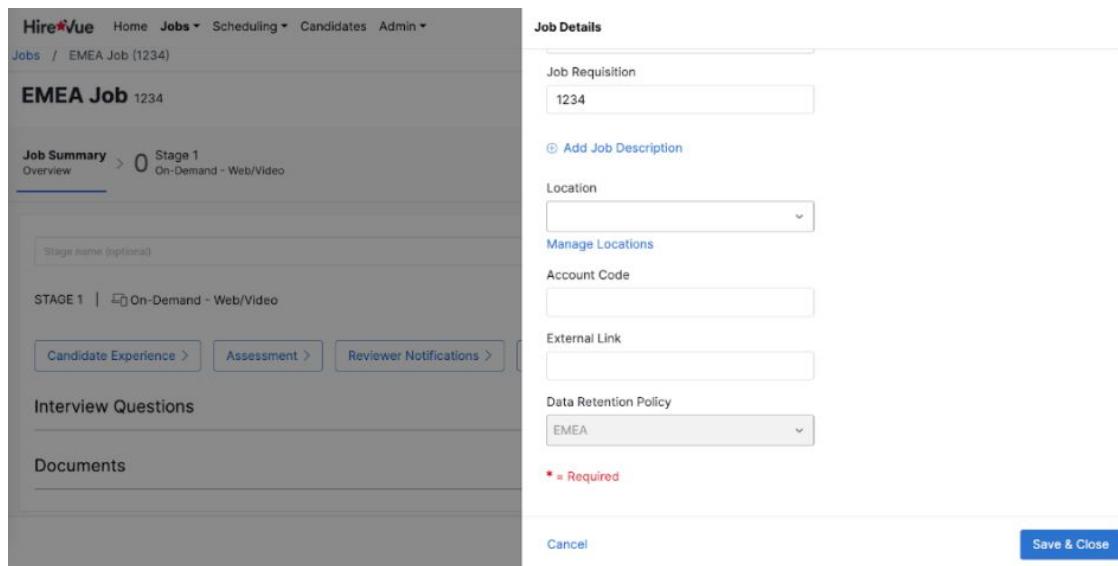

For Customer Admins or users that have been granted the proper permission, the data retention policy is also editable on the Job level.

T2O Multiple Data Retention Policies per Application (cont.)

Recruiters and below, will by default have read only access to this field.

Feature FAQs:

- **What happens if a deletion policy is deleted?**
  - If the deletion policy is deleted, any job templates or jobs associated with that deletion policy will be updated to the Default Deletion Policy
  - There are warnings and a pop up letting the user know that this is the intended behavior upon deletion
- **What happens if a deletion policy is edited?**
  - If a deletion policy is edited to change number of days for any of the available fields, this will apply to all existing Job templates and jobs that have the deletion policy assigned
- **If I update the deletion policy on the template does it change on the job level?**
  - If the deletion policy selected is changed on the template level, like all other edits to the job template, it will be a go forward only change.
  - Existing jobs will keep the policy name assigned at creation.
  - A customer admin can edit the policy selected on the job level if necessary
- **What if the custom deletion policy is longer than the default policy, which policy takes precedence?**
  - The policy assigned to the job will always take precedence even if it is longer than the default policy
- **How are candidates affected that have applied to multiple jobs with different policies?**
  - If a candidate reaches the deletion policy limit on a given job, the system will delete the interview and any data associated with that interview
  - The system then checks to see if there are any other interviews associated with that candidate
    - If there are not, the full candidate profile is then also deleted
    - If there are, then the candidate profile is left intact and tied to the other interview(s), only the interview data associated with the given job is deleted

Google Workspace Calendar Sync

Feature release type: Public

What are we improving: As a Google Workspace calendar user, I can sync my calendar for T2O scheduling.

Why is this feature/functionality valuable:

For you: As a scheduling customer, my users rely heavily on their calendar to schedule, so checking calendars are free before booking is critical to my success.

Applicants/Candidates: As a candidate, I am more likely to have an interviewer show up and not reschedule, as I have booked based on real availability.

How to access and configure:
If you are interested in activating this feature, please reach out to your Customer Success Director to have this feature enabled for your account. There is no additional charge to leverage this feature for Scheduling customers.

Feature FAQs:
- How can I learn more about this calendar sync?
  - Reach out to your Customer Success Director to request the Sync Overview documents.

T2O Reschedule Automation for Simple Scheduling

Feature release type: Public **Available February 13th**

What are we improving: Today, if the interviewer can't make the interview, they need to tell the Recruiter or Coordinator, so the Recruiter or Coordinator and contact the candidate and manually determine a new interview time or request the candidate to self reschedule. With this feature, as a customer, **I can automate rescheduling when the interviewer can't make the interview.**

Why is this feature/functionality valuable:

For you: There's always a possibility that an interviewer can't make a scheduled interview. This eliminates manual work in that common scenario while offering a more streamlined candidate experience.

Applicants/Candidates: As a candidate, I am informed and empowered to drive the hiring process forward myself with ease. I am also less likely to be ghosted by the interviewer.
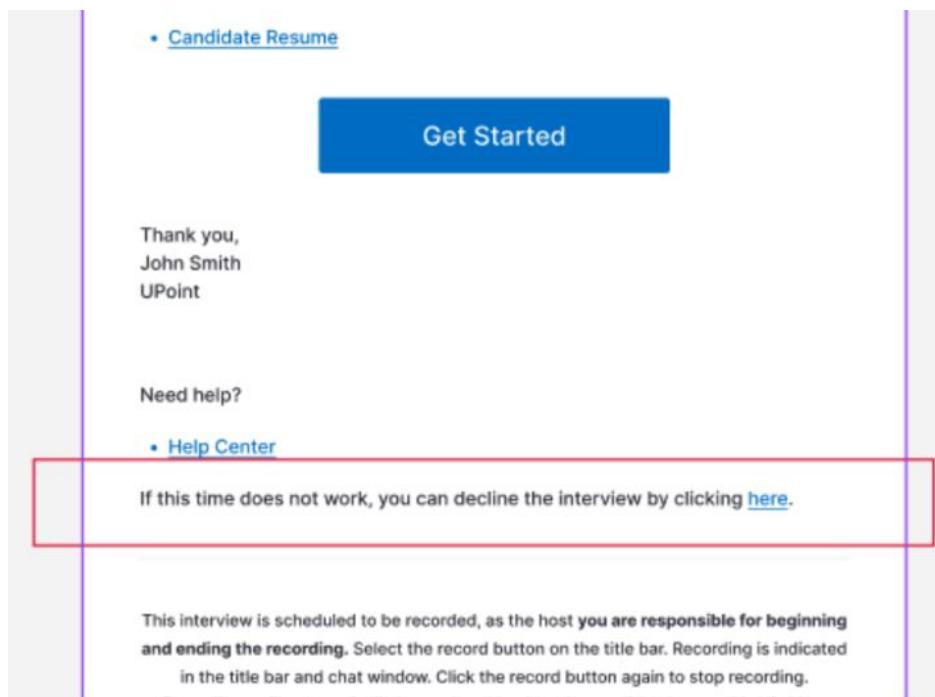
Feature Walkthrough:

Simple Scheduling
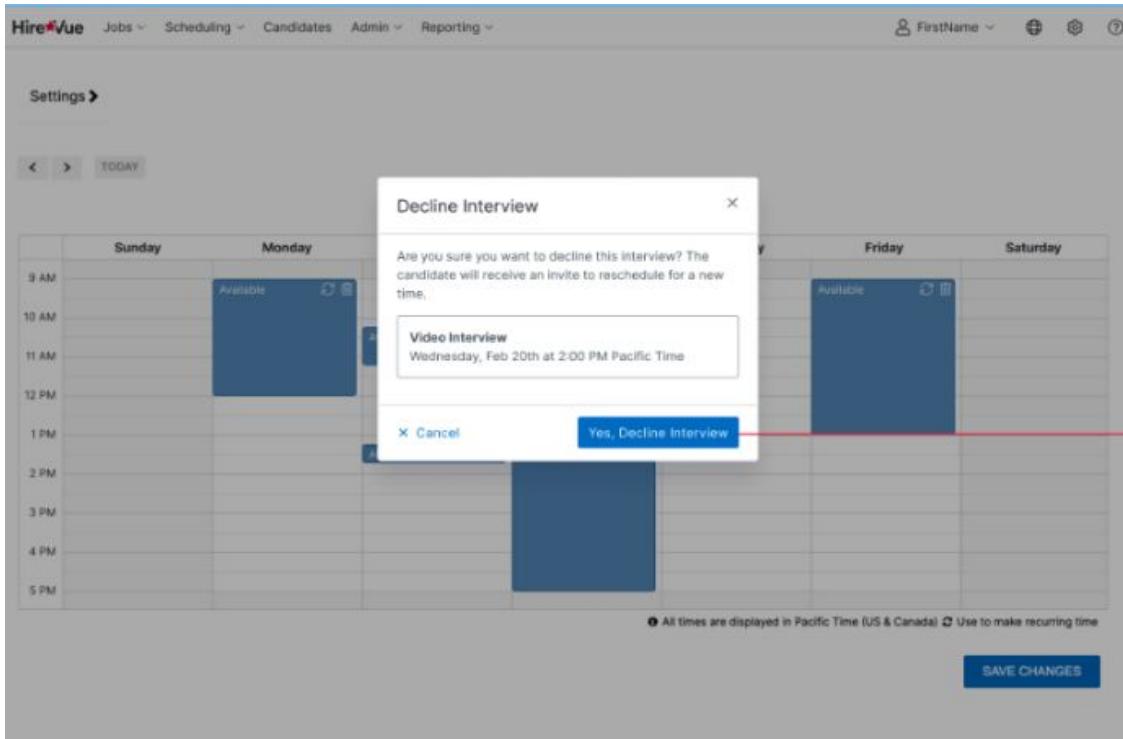
Declining the Interview

Interviewers can indicate they cannot make the interview (aka decline the interview) in 2 ways:
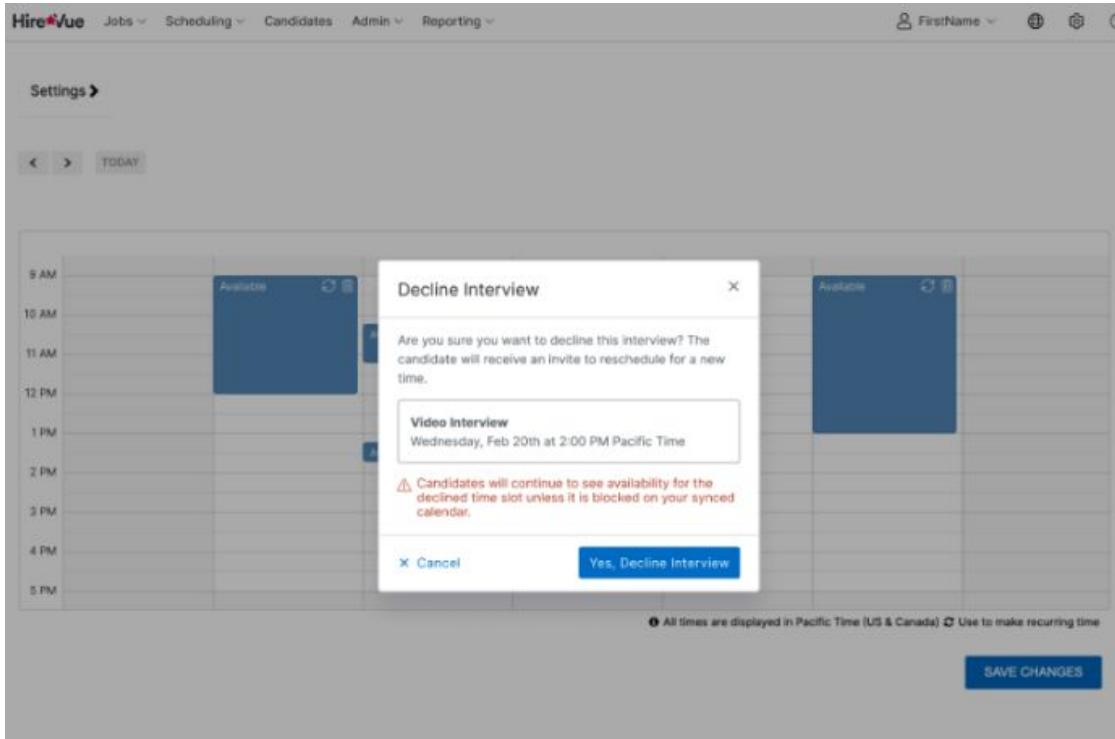
1.   Click the link within an interview invite

T2O Reschedule Automation for Simple Scheduling (cont.)

User sees a confirmation to Decline in the UI. Non-calendar synced user:
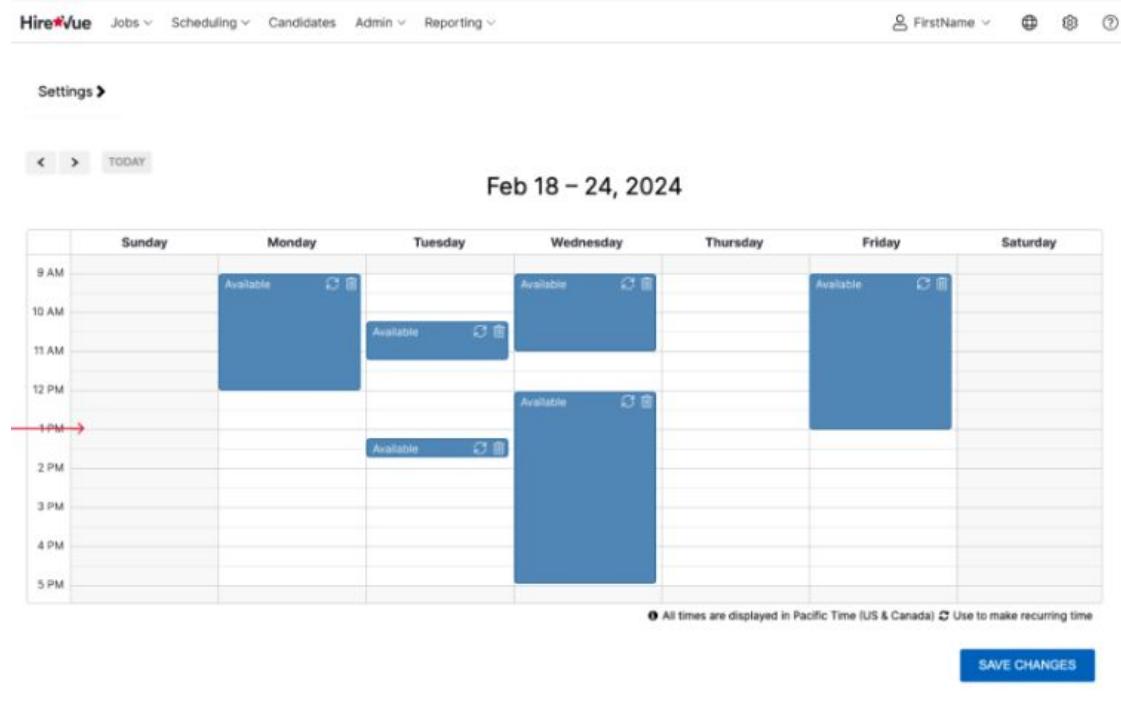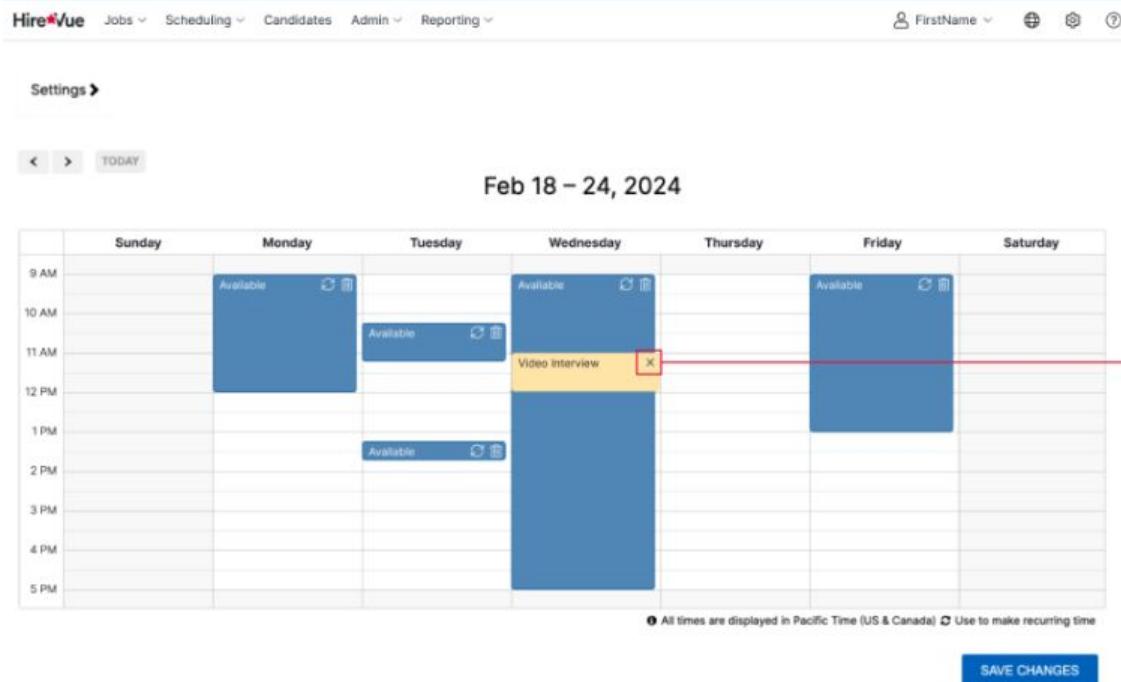

Calendar synced user

T2O Reschedule Automation for Simple Scheduling (cont.)

Click **Yes, Decline Interview**
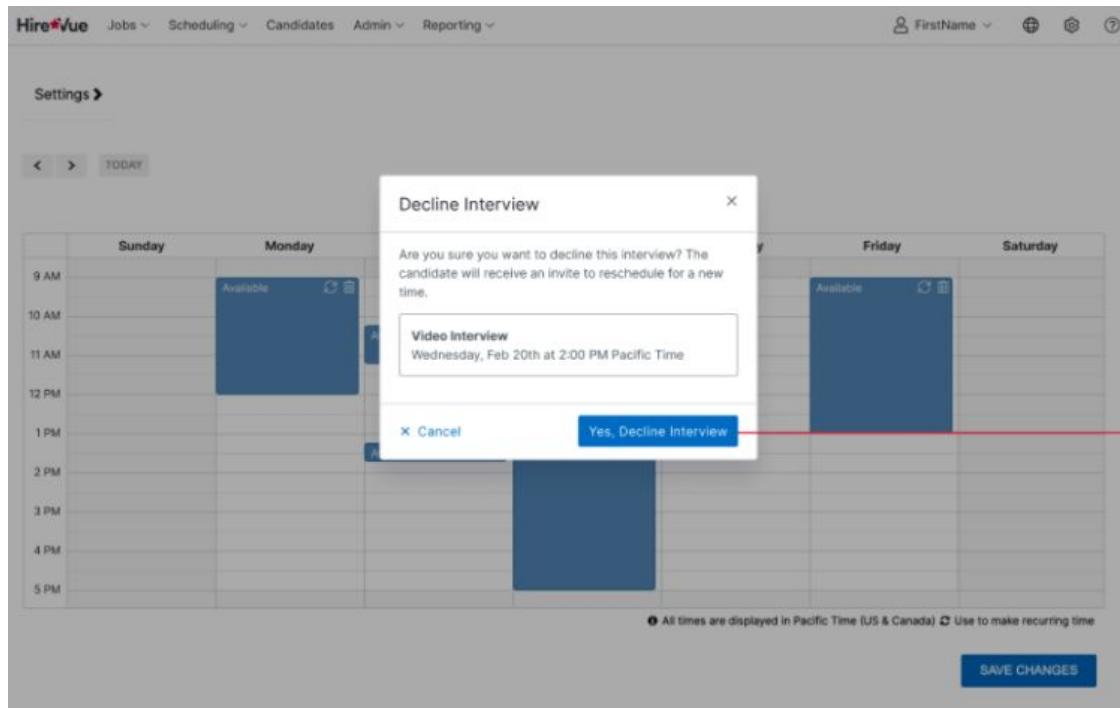

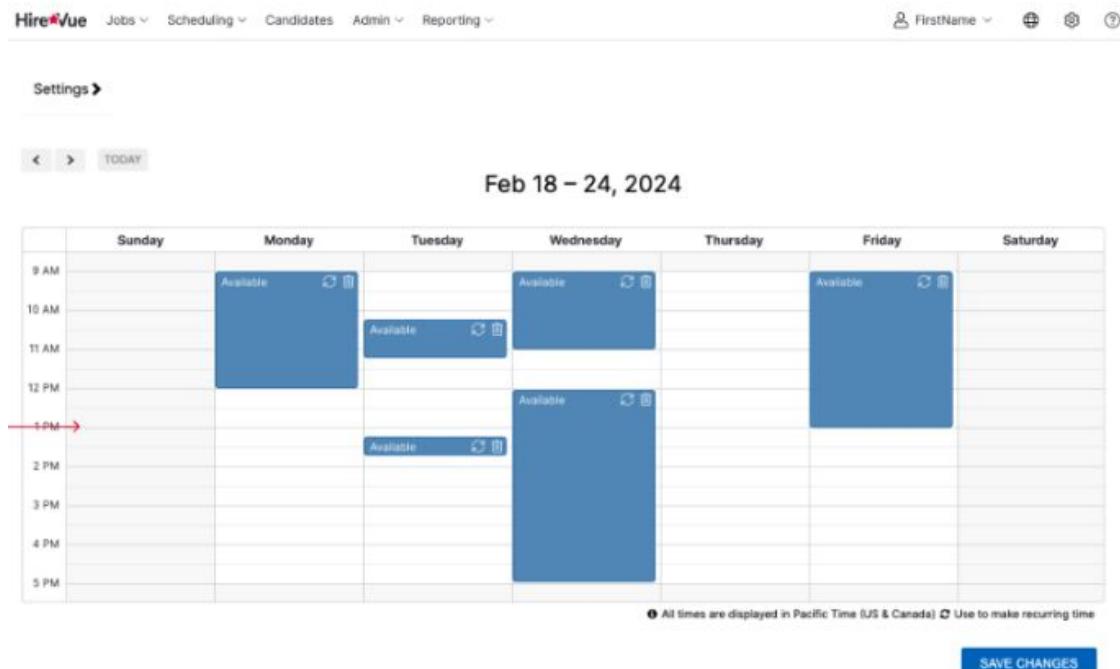2. *(Non-calendar synced interviewers only)* I can click the X button on a specific interview in **My Availability**

T2O Reschedule Automation for Simple Scheduling (cont.)
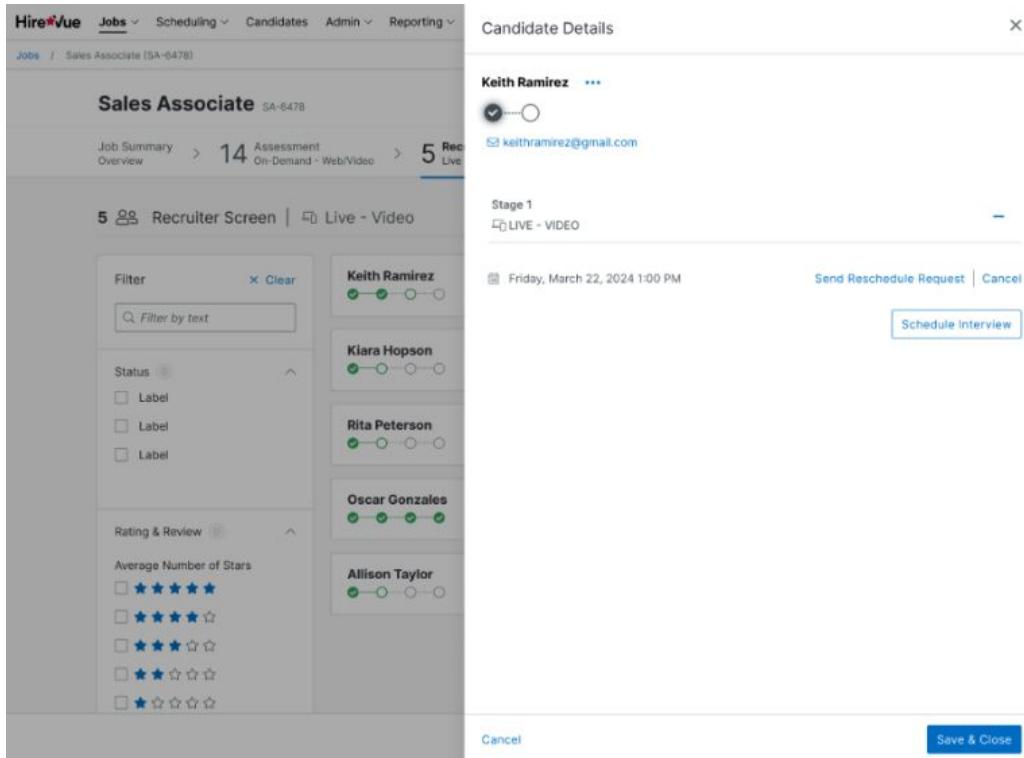
User sees a confirmation to Decline in the UI

Click **Yes, Decline Interview**

T2O Reschedule Automation for Simple Scheduling (cont.)

If the feature is licensed, recruiters and coordinators (T2O business users) can trigger the candidate to reschedule on behalf of the interviewer from the Candidate Details page:
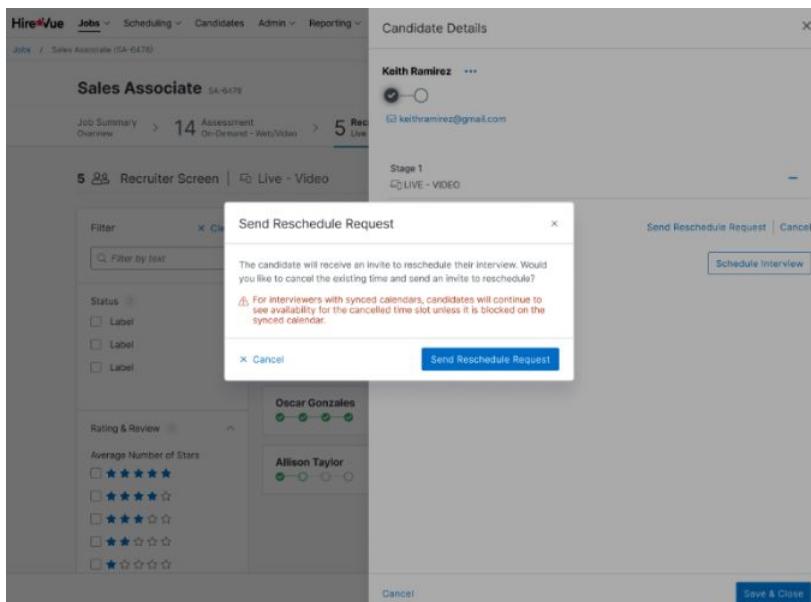
Click **Send Reschedule Request**

User is presented with a confirmation to Decline in the UI.

Click Send **Reschedule Request.**

T2O Reschedule Automation for Simple Scheduling (cont.)

Adjusting an Interviewer's Availability After an Interviewer Declines

Non-calendar synced interviewers only: Availability holds are automatically adjusted to remove the declined slot (date and time) and updated calendar holds (ics files) are sent to the interviewer.

Availability before declining the interview:
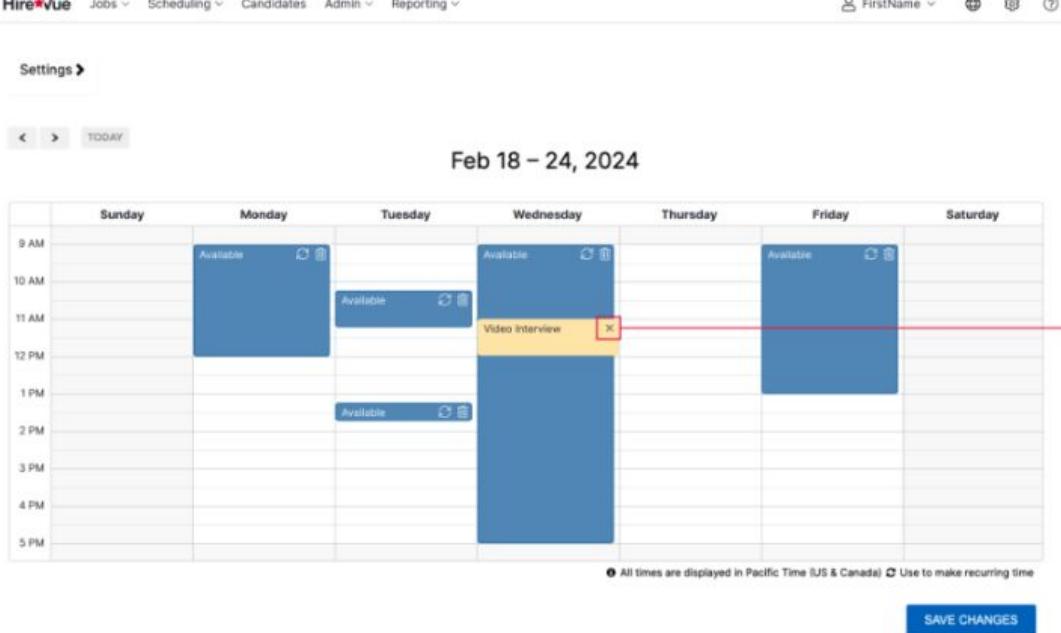
Availability after declining the interview:
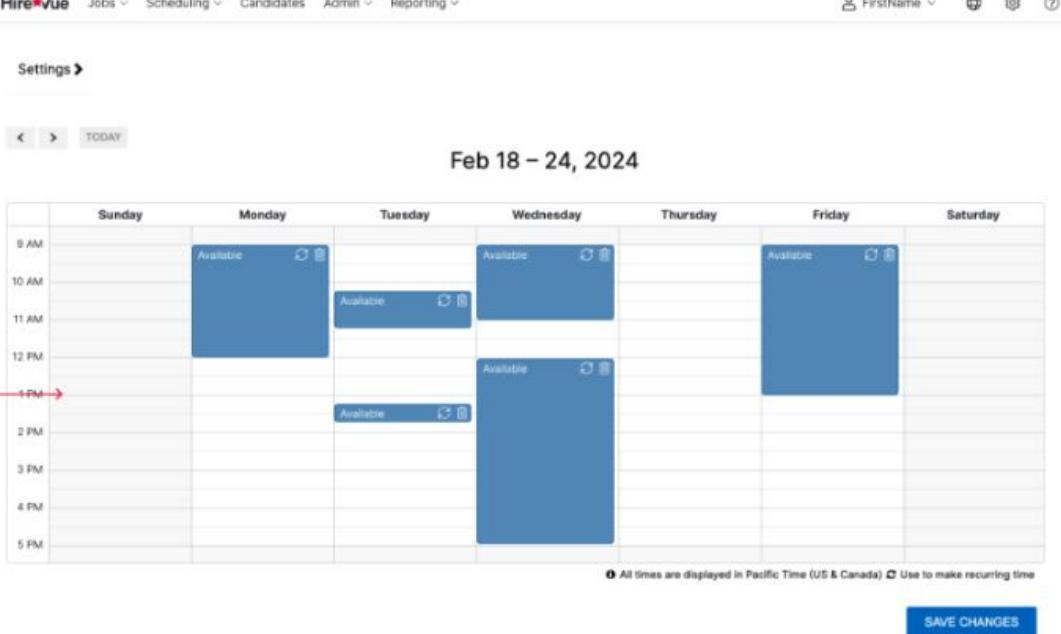
T2O Reschedule Automation for Simple Scheduling (cont.)

Updated availability hold email notifications are sent to the interviewer.

Calendar synced users: **Availability is not adjusted.** Interviewers are expected to block their external calendar calendar manually, if they are not available at that time. We remind the user to do this in the UI on the decline confirmation. (Interviewers who decline the invite directly may not see this UI).

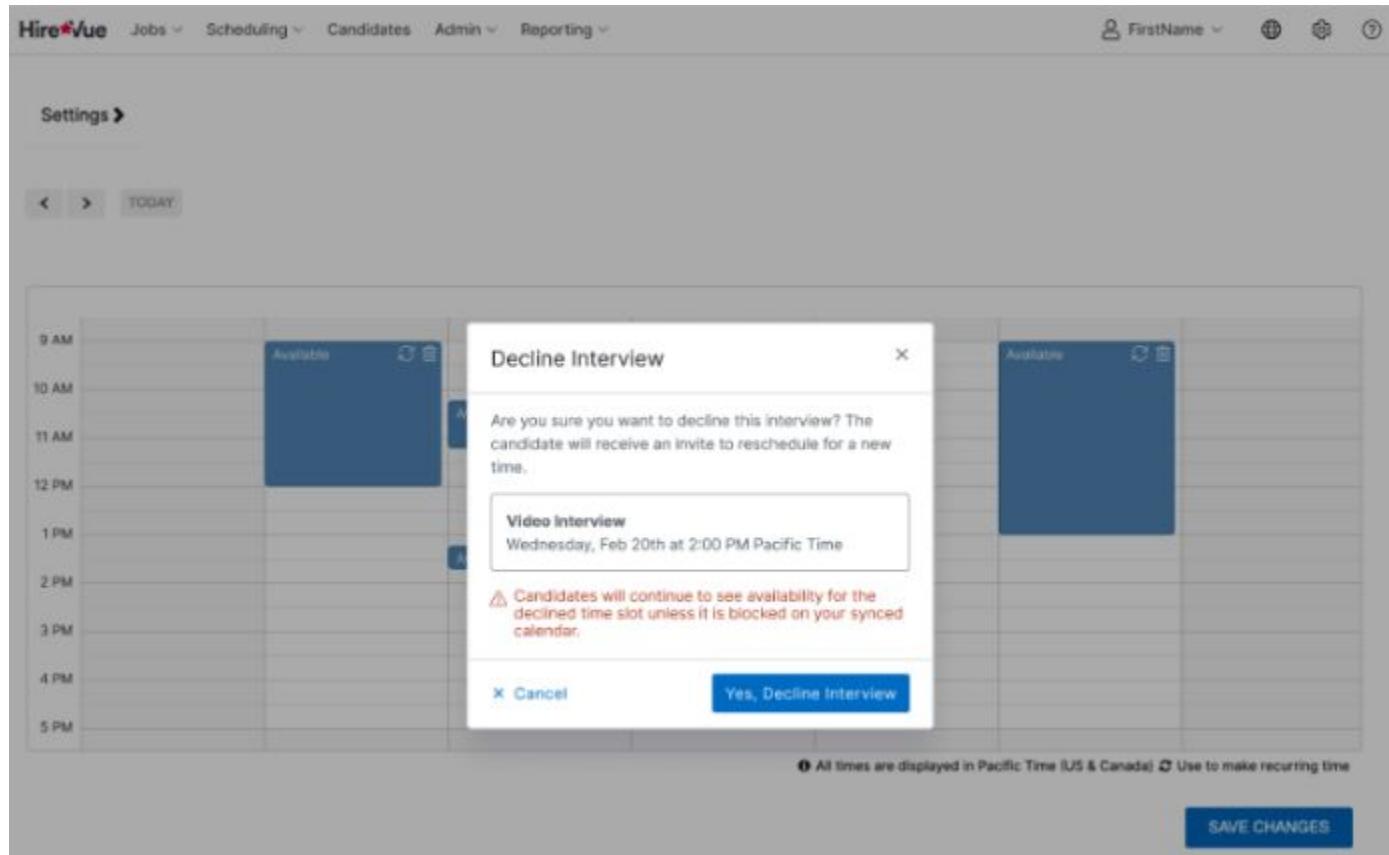> **Change management tip:** Inform Calendar Synced users that their availability will not be automatically adjusted once they decline an interview. They will need to adjust their availability by adding a block to the external calendar, if desired.

Interview Status in our System

The interview is canceled in our system (until the candidate reschedules the interview).

T2O Reschedule Automation for Simple Scheduling (cont.)

Hiring Team and Candidate Communications

The Interviewer and any Additional Participants receive interview cancellation related communications.

(No changes to existing functionality) Candidate receives an invite cancellation ics file email and associated SMS/WhatsApp messages, as configured.

Candidate receives an Reschedule Request email and associated SMS/WhatsApp messages, as configured.

- Email:
    - Reschedule Request In Person Interview
    - Reschedule Request Live Phone Interview
    - Reschedule Request Live Video Interview

      List of Email Templates:

Email Templates

3 Items   Sort: **Name** | Stage Type | Custom

NARROW BY	× Clear

reschedule   ×   🔍

☐ Custom Templates Only

Stage Type —

☐ Assessment
☐ In Person
☐ Live - Phone
☐ Live - Video
☐ On-Demand - Phone
☐ On-Demand - Text
☐ On-Demand - Web/Video

Recipient —

☐ Candidate
☐ Interviewer

Reschedule Request In Person Interview
🖥 IN PERSON   Candidate ···

Reschedule Request Live Phone Interview
📞 LIVE - PHONE   Candidate ···

Reschedule Request Live Video Interview
🖥 LIVE - VIDEO   Candidate ···

T2O Reschedule Automation for Simple Scheduling (cont.)

Example Email:

- SMS: SmsCandidateSelfSchedule_InterviewerDecline
- WhatsApp: N/A (no template name associated)

Candidate follows link to existing scheduling/rescheduling experience.
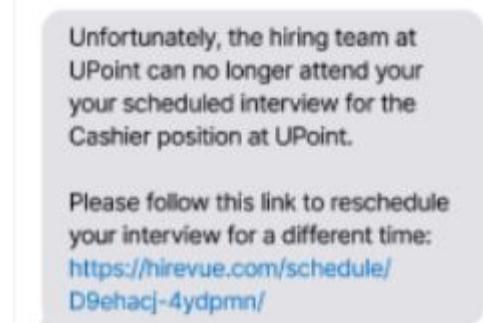
How to access and configure

If you are interested in activating this feature, please reach out to your Customer Success Director to have this feature enabled for your account. There is no additional charge to leverage this feature for Scheduling customers.

Once the licensing option has been configured to enable this feature, this feature will be turned on for all Simple Scheduling interviews.