



GLHS Sourcing Agent

Quick-Start Guide

What this tool does in one sentence?

It reads a candidate's resume or LinkedIn profile and instantly matches them to our open Crelate jobs, applying our exact-state license rules automatically, so recruiters spend less time hunting and more time calling.

This tool does the first 15 minutes of grunt work for you, finding which of our 300 jobs fit a candidate. Your job is still to call, build the relationship, and close. It just gets you to the phone faster.

THE TOOL AT A GLANCE

There are six areas in the left menu. Here is what each one is for:

Area	What it does ...
 Screen Candidate	Paste one resume or LinkedIn profile → get exact job matches plus "shopping" options to pitch on the call.
 Chat Assistant	Ask questions about our jobs in plain English — e.g. "Show all remote RN jobs" or "Which Bounty jobs are open?"
 Bulk Upload	Paste several candidates at once (separated by ---) to screen them all together.
 Candidate DB	Save candidates so the tool can re-match them automatically when new jobs come in.
 Job Manager	Upload the daily XML job feed and see jobs sorted by category (ShiftMed, Permanent, RFP, Temps, Bounty).
 Essen Rules	The list of Essen jobs we never match candidates to. Already set, recruiters rarely touch this.

THE CORE WORKFLOW: Screening a Candidate

This is the main thing recruiters will do all day.

1. Go to  **Screen Candidate**
2. Paste the candidate's resume or LinkedIn profile into the big box.
3. Add any Internal Notes — e.g. "prefers Brooklyn, min salary \$95k, declined #1234."
4. Leave Essen Jobs on "Exclude" (the default).
5. Click **Screen Candidate** and wait a few seconds.

Reading the result

The result comes back in clear sections.

-  **EXACT MATCHES (Ready to Submit)** — jobs in the candidate's licensed state or remote. These are ready to submit today.
-  **SHOPPING OPPORTUNITIES (Pitch on the Call)** — strong fits in other states that would need a new license. Use these to keep the candidate engaged: "We also have a great role in Texas if you'd be open to getting licensed there."

The #1 rule

The tool only shows EXACT-STATE matches as "ready." A candidate licensed in NJ will NOT get NY jobs in the ready list — those appear only as shopping opportunities, clearly flagged "Needs NY license."



AFTER SCREENING

Once a candidate is screened, three buttons appear. Show each one:

Prepare Intake Form

Pre-fills our Crelate digital intake form from the resume. It shows a Quick Summary ("Found in resume" vs. "Ask on call") and then the full form in Crelate order, ready to copy-paste. It never invents answers — anything not in the resume is marked " ? ASK ON CALL."

- Use this right before calling a candidate so you walk in already knowing their email, phone, license states, experience, and more.

Save to DB

Saves the candidate into the Candidate Database. When new jobs are uploaded, saved candidates get flagged "NEW JOBS" so you can re-match them with one click.

DAILY HABITS (WHAT GOOD LOOKS LIKE)

When	Do this
Start of day	I will uploads the fresh XML feed in Job Manager. Categories tag automatically. Everyone else just refreshes.
Every new resume	Screen it. Read Exact Matches first, then Shopping Opportunities.
Before every call	Click Prepare Intake Form so you're ready with what we already know.
Promising candidates	Save to DB so they get auto-matched to future jobs.
Quick questions	Use the Chat Assistant instead of scrolling the job list manually.

COMMON QUESTIONS FROM THE TEAM

"Why didn't it show a NY job for my candidate?"

Because the candidate isn't licensed in NY. That's correct behavior — check the Shopping Opportunities section; the NY role is probably there, flagged as needing a NY license.

"The result looks cut off or wrong."

Re-run it once. If it still looks off, tell Tayyab or Gustavo — don't submit off a bad result. The tool assists; your judgment decides.

"Can I trust the intake form answers?"

Trust what's marked "Found in resume," but always confirm on the call. Anything marked "Ask on call" or "(confirm)" must be verified with the candidate.

"Does this replace Crelate?"

No. It speeds up sourcing and prep. Crelate is still our system of record — you still log everything there.

Three things to remember:

- (1) Screen every candidate before you call.
- (2) Read Exact Matches first, then use Shopping Opportunities to keep them engaged.
- (3) Prepare the Intake Form before every call. Do those three and you'll save yourself an hour or more a day.