

How To Create an Evaluation to Maximize AI-Driven Summaries

The more company-specific information you add, the more meaningful and personalized your AI summaries will be. These features are designed to enhance your evaluations, not replace your decision-making.

Evaluation Plans

Add Job Description (Accounts Settings > Settings > Job Descriptions)

Add Values & Culture (Accounts Settings > Settings > Values & Culture) (*optional*)

Add Competencies (Accounts Settings > Settings > Competencies) (*optional*)

Decide on Assessment (Testing > Test Catalog) (will be added to Evaluation later)

Create a Test Battery if more than assessment/recorded interview is needed (Testing > Advanced Features > Test Batteries) (test battery will be added to Evaluation later).

Choose or Create a Reference Check Template
(Reference Checks > Reference Check Templates > Choose or Create Template)
(will be added to Evaluation later)

Create an Evaluation Plan (Account Settings > Evaluations > Create an Evaluation Plan)

Add Information
(Name of Evaluation Plan > Sub-Organizations (if there is one) > Job Descriptions (choose up to 5) > Reference Check Template (choose Template) > Max Days to Wait (AI summary will be generated after (X) days even if all parts are not complete) > AI Scoring (choose the summaries you want included in report) > Save)

Add Test or Test Battery (Select Test or Battery > Save)

Assign Evaluation Plan
(Scroll down > Click Assign this plan to a Candidate or Employee > Enter Candidate's Information > Choose to Select "Re-Use existing test keys and reference checks" and/or "Send an email/text to Complete Evaluation Set Up" and Send to Candidate)

Results for Evaluation Plans
See Results for Evaluation Plan by searching for Candidate, Clicking on their Profile, and scrolling down to "AI Summary"

To see the numerical scores, you can also go to Testing > Test Results > Click on Candidate's Name > Click Compare > If it's an assessment from an Evaluation Plan, it will show the 3 scores for these summaries.