

Use this guide as a checklist to set up your program from start to finish. Any task that is **Teal** is a required task that must be completed prior to moving forward or completing your interview day.

*\*Interested in purchasing an Add-on feature? Contact the **Thalamus Sales Team** today!\**



## 1. Update Program & Administration

- ☐ **Add all program interviewers and administrators**
- ☐ **Add or update program Track/s**
- ☐ Update Program Profile
- ☐ Upload a program video & link social media pages



## 2. Setup Calendar & Waitlists

- ☐ **Create interview & social events**
- ☐ **Set available spots for each track & tier**
- ☐ Customize calendar settings
- ☐ Customize waitlist settings



## 3. Emails, Surveys, & Rosters

- ☐ Create & customize email templates
- ☐ Customize Interview Panel & other Roster Layouts
- ☐ Create survey questions



## 4. Scoring Categories & Algorithms

- ☐ Create scoring categories
- ☐ Create and customize scoring algorithms
- ☐ Provide scoring information to interviewers



## 5. Application Review in **cortex**

*\*Add-on*

- ☐ **Enable Cortex access to any program users**
- ☐ Set up algorithms, filters, and blinders
- ☐ Bulk Print PDF applications from ERAS
- ☐ Upload PDF files to Cortex
- ☐ Review applications and set status



## 6. Import Applicants to Thalamus

- ☐ **CORTEX** - Import applicants from Cortex
- ☐ ERAS - Setup CSV export template in ERAS
- ☐ ERAS - Export applicants to CSV
- ☐ **NON-ERAS** - Create CSV template
- ☐ **Import CSV into Thalamus**



## 7. Setting Status & Inviting Applicants

- ☐ **Assign a Tier to all applicants**
- ☐ **Assign Track/s to all applicants**
- ☐ Create and assign applicant tags
- ☐ **Invite applicants**
- ☐ Send any pre-interview survey questions



## 8. Itinerary Wizard -OR- Itinerary Builder

*\*Add-on*

- ☐ Set Thalamus Video or integrate 3rd party video app
- ☐ Create interview sessions by running the **Itinerary Wizard** -OR-
- ☐ Manually create itineraries using the Itinerary Builder
- ☐ **Publish finalized itineraries**



## 9. Video Chat & Master View

*\*Add-on*

- ☐ Review all troubleshooting video chat documents
- ☐ Test video chat with your program staff and interviewers
- ☐ **View and manage the Thalamus video interview sessions through the Master View**



## 10. Create and Export Rank List

- ☐ Auto create rank list based on overall score
- ☐ Customize rank list by manually ranking applicants
- ☐ Mark "Matched" applicants & create match composite
- ☐ Export rank list & applicant data

## *\*NEW* 11. View & Analyze Recruitment Season Data Using **Cerebellum**