Applicant Tracking Software Checklist

If you are planning on investing in an ATS this year, it helps to have an idea of the functions and features of the software that are critical to you, and features that are nice to have. We have put together a helpful checklist of the main features of most applicant tracking software to help you with your decision. When you attend software demos, you can use this handy checklist to track the benefits of each product you view, as well as add your own notes.

Product Name: _____

Demo Date: _____

Name, Contact Info of Sales Rep(s): _____

Feature	Included	Notes/Comments
Cloud Based/Hosted	YES / NO	
Installed Product	YES / NO	
Configurable	YES / NO	
User Based Security	YES / NO	
Website Integration	YES / NO	
24/7 Access	YES / NO	
Import Data from Other System	YES / NO	
Easily Export Data from ATS	YES / NO	

Candidate Experience

Branded Career Center	YES / NO	
Mobile Friendly	YES / NO	
Applicant Portal	YES / NO	
Automatic Replies	YES / NO	
Resume Parsing	YES / NO	
Employment Application	YES / NO	
Internal Applicants	YES / NO	
Track Employee Referrals	YES / NO	

Job Posting

Unlimited Candidates	YES / NO	
Unlimited Job Postings	YES / NO	
Job Approval Process	YES / NO	

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Feature	Included	Notes/Comments
Job Board Posting	YES / NO	
Social Media Posting	YES / NO	

Candidate Tracking

Assign Status/Workflow	YES / NO	
Track Candidate Dispositions	YES / NO	
Schedule Appointments	YES / NO	
Send Candidate Email	YES / NO	
Send Candidate Texts	YES / NO	
Assign/Move Requisition	YES / NO	
Forward Candidate via Email	YES / NO	
Rate/Rank Candidate	YES / NO	
Hiring Manager Access	YES / NO	
Score and Add Interview Notes	YES / NO	

Reporting

Applicant Reports	YES / NO	
Requisition Reports	YES / NO	
EEO/AA Reporting	YES / NO	
Time to Fill/Time to Hire	YES / NO	
Custom Reports Included	YES / NO	

Onboarding

Includes Electronic I-9	YES / NO	
Includes Electronic W-4	YES / NO	
Includes State Tax Withholding	YES / NO	
Form Builder	YES / NO	
New Hire Completes Online	YES / NO	
Track Status of Forms	YES / NO	
HR/Payroll Integrations	YES / NO	
Employment Tax Credits	YES / NO	

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Feature	Included	Notes/Comments
Background Screening	YES / NO	

Training & Support

Training is Included	YES / NO	
Additional Cost for Training	YES / NO	
Live Support/Customer Service	YES / NO	
Knowledgebase / Help Manual	YES / NO	

Costs

Set Up / Implementation Costs: _____

Any Recurring Fees: Monthly _____   or Annual _____

Cost is based on: Number of Users: _____

Number of Job Postings: _____

Other: _____

Notes:

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