

E-Recruitment

Training Guide

2000 – 2007 NEOGOV, Inc.

Last Revised: 7/31/12

Recruitment Process

(Online Hire Center (OHC) Roles are Highlighted)

★ - Optional Step

Step in Recruitment Cycle	Access / Role
Requisition Created	Agency Hiring Manager/Supervisor (May differ by agency) HR Liaison or Originator
★ Requisition Approved	Agency Hiring Manager/Supervisor Approver (Other Approvers such as Budget, Deputy Director, etc.) - Optional
Requisition Opened/Assigned	HR
Exam (Recruitment) Plan Creation	HR
Posting Creation	HR
Evaluation Step Creation	HR
Applicants Search for Jobs	Applicant
Applicants Apply	Applicant
Key in Paper Applications (Master Profile)	HR
Applications Processed (View Applicants by Step in the Evaluation Step) <ul style="list-style-type: none"> • Minimum Qualification Screening • Training & Experience Evaluation • Written, Oral, Performance Exams 	HR
★ *SME Review can occur at any step	SME (Subject Matter Expert) - Optional
Applicants placed on Eligible List	HR
Applicants Referred to Hiring Manager (Currently, will print applications or send email with pdf attachment) Active, but hiring mgrs not trained yet	HR
Referred Candidates: Interviewed	Agency Hiring Manager/Supervisor (May differ by agency) HR Liaison or Originator

Recruitment Process

(Online Hire Center (OHC) Roles are Highlighted)

★ - Optional Step

Step in Recruitment Cycle	Access / Role
Referred Candidates: Make Offers	HR/Agency Hiring Manager/Supervisor (May differ by agency) HR Liaison or Originator
★ Referred Candidates: Add Comments for FOIA for top 3 candidates	Agency Hiring Manager/Supervisor (May differ by agency) HR Liaison or Originator
Referred Candidates: Rejection Notices Sent	HR
Referred Candidates: Hired	HR
Final approval hiring decisions after "Hiring Mgr"	Approver (Ex. Budget, Deputy Director, etc.) – Optional
Requisitions Filled	HR
Posting Archived	HR
Exam Plan Archived	HR

EXERCISES

Create a Requisition (As a Hiring Manager/Supervisor)

1. Go to: **training.neogov.com**
2. Click on the 'Login' link in the upper-right-hand corner
3. Enter your Online Hire Center (OHC) Username and Password (write it to the right for future reference):
4. Select the '**Online Hiring Center – Departments**' radio button, click login



5. Click on 'Open New Requisition'



6. Search for a class specification for which you want to create the requisition
7. Click on 'Create New' in the Requisition column (all the way to the right-hand side)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Search for class title or class code: **Go**

17 records found.
Page 1 of 1

Code	Title	Requisition
1920	Accountant	Create New
1918	Accounting Clerk	Create New
5961	Building Official	Create New

8. Fill in the requisition form, **select your own name as the ‘Hiring Manager’ for this training exercise.**

Desired Start Date	4/15/06			
* Requisition #	[assigned when requisition is saved]			
Working Title	Human Resource Manager			
Vacancies	1			
* Department	Human Resources			
Division	=== Select ===			
* Hiring Managers	Available: Smith, Mary White, Bill			
	Assigned: Doe, John Hilty, Joanne			
Job Term	Full-Time			
List Type	Regular			
Position Type	<input checked="" type="radio"/> Existing Position (Replacement of Staff) <input type="radio"/> New Position			
Position Control	Position #	First Name	Last Name	Vacancy Date
	12521	Sally	Johnson	3/30/06
	Add Another Vacancy			
Skills:				
Comments:				

9. Check the ‘No Approvals’ box at the bottom of the screen

10. Click on ‘Save and Release’

- Select Save (if you are not going to send to HR immediately-need to review information at a later time) or;

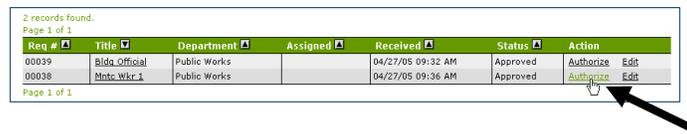
Note: The Approval process is used by the Hiring Manager/Supervisor to obtain the necessary on-line approvals when required.

Assign a Requisition, (As Human Resources)

11. Click the 'NEOGOV OHC' tab in the upper left corner
12. Select 'Insight'
13. Choose 'Approved' from the 'Requisition' dropdown (NOTE: To view Requisition detail, Click on "Title" and view Requisition. HR users can edit the requisition, if needed.)

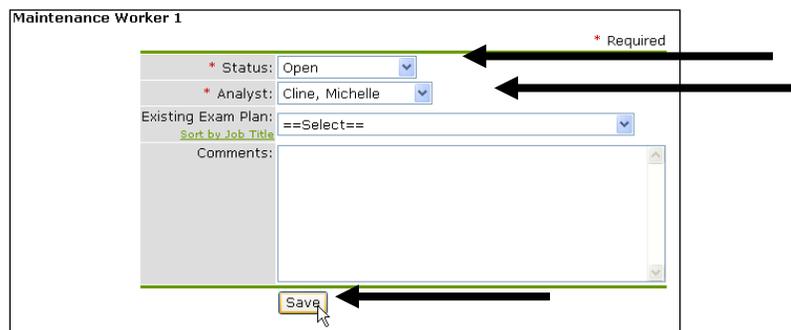


14. Click the 'Authorize' link next to the requisition you are working on



- Change 'Status' to 'Open'
- Select your own name from the 'Analyst' dropdown
- Do not change the 'Existing Exam Plan' dropdown

15. Click the 'Save' button



16. Click on your name in upper right hand corner, then select 'My HR'
17. The requisition will display in the 'Requisitions' section (If your requisition did NOT show up, go back to the 'Approved' option in the 'Requisition' dropdown and see if it is there. If it is there, then you need to 'Authorize' the requisition again and make sure that you set it to 'Open')
18. Click on the 'Create Exam' link next to your requisition

19. Fill out the 'Exam Type' and 'Job Type', then click the 'Save' button

* Class Spec: 5228 - Maintenance Worker 1
 * Job Title: Mntc Wkr 1
 Exam Number: 00038
 Vacancies: 1
 * Exam Type: Open
 * Job Type: Full-Time Regular
 * Department: Public Works
 Division: Maintenance
 Job Line: Yes No
 Print Bulletins: Yes No
 Number of Bulletins: Fold-out: Yes No
 Comments:

Create Job Posting (As Human Resources)

20. Click on the 'Add New' link next to the 'Job Posting' text

Job Posting	Add New				
Job No.	Job Title	Status	Last Updated	Assigned To	Action
Recruiting Plan Add New					
Ad Type	Ad Name	Requested Date	Start Date	End Date	Action

21. Fill out the job posting form

- Check 'Draft' box at top of page
- Change the 'Advertise From' date
- Change the 'Advertise to' date to some date in the future
- Select at least one category (Click and highlight)
- Location on Job Posting Display
- Government Jobs Location (Automatic Default for Columbia, SC)
- Search Location (Click and Highlight)
- Application Template (Default always)
- Populate the class spec description fields
- Normal Work Schedule
- Class Code, Slot, Position Number
- Agency Specific Application Procedures
- EEO Category
- Hiring Range-Min and Max (Agency Hiring Range)
- FLSA Category
- Pay Band
- Show Salary Breakdown
- Select the 'Yes' Supplemental Question radio option (at the bottom of the page)
- Click on the 'Add' button (NOTE: As soon the 'Add' button is clicked, the posting will go live immediately unless the 'Advertise From' date is a future date.)

* Required

Advertise From: April 27 2005
 Advertise To: May 31 2005 5 pm :00

* Job Title: Maintenance Worker 1 - MC
 Exam Number: 00038
 Exam Plan: 00038 - Maintenance Worker 1 - MC
 * Job Type: Full-Time Regular
 * Category: Accounting and Finance Administration
 Administrative Assistant Agriculture Airports
 Maintenance

* Assigned To: Cline, Michelle

Description: Performs varied manual work and operates light and medium-sized construction equipment to maintain City street, sewer, wastewater treatment plant facilities, drainage systems and related structures.
 SUPERVISION RECEIVED AND EXERCISED:
 Receives supervision from a Public Works Department supervisor; receives on-going lead direction from other Maintenance Worker

Examples of Duties: Performs varied public works maintenance activities such as hauling and spreading gravel to a uniform depth; shoveling and raking asphalt, cleaning catch basins and ditches, and assists with installing sewer pipe to proper grade.
 Cleans wastewater grit channels, hoses down wastewater clarifiers, and operates portable pumps or equipment required in a wastewater treatment plant.

Typical Qualifications: Knowledge of:
 Types and uses of tools and light equipment used in maintenance, repair, and/or construction work.
 Standard safety precautions and ability to identify hazards.
 Ability to:

Supplemental Information:

If bilingual, which language is desired? ==None

* Location: Metropolis Add Location
 * Department: PUBLIC WORKS

Salary Information
 Auto-Update: Automatically update salary information from Class Specification.
 * Minimum Salary: 13.11
 Maximum Salary: 15.89
 * Per: Hour * Based on 2080.00 hours per year
 Show Salary Breakdown: Hourly Biweekly Monthly Annually
 Salary Display: Check this box to show salary as Negotiable

22. Click on the 'Item Bank' link in the upper-right-hand corner

00038 Maintenance Worker 1 - MC Item Bank | Scoring Plan

* Required

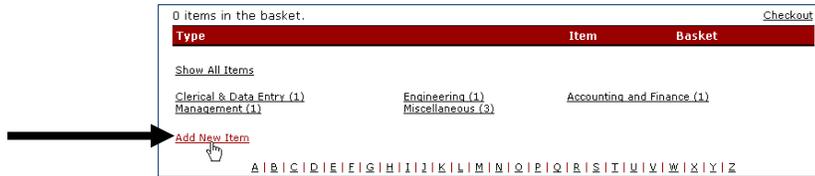
* Question

* Response Format: Text Answer Select From Choices Answer Yes/No Answer
 * Input Type: Text Width 20 Rows 4
 * Is the candidate required to answer the question? Yes No
 Confidential Question Yes No

Save

Note: Supplemental Question Screen (1 time question only)

23. Click on the 'Add New Item' link



24. Fill in the supplemental question form (you must input information in every field with a red asterisk next to it)

A screenshot of a supplemental question form. The form contains several fields with red asterisks indicating they are required:

- * Question:** "What software programs are you proficient in using?"
- * Category:** "Miscellaneous" (dropdown menu)
- * Type:** "Overall computer and clerical experience" (dropdown menu)
- * Response Format:** Radio buttons for "Text Answer", "Select From Choices Answer" (selected), and "Yes/No Answer".
- * Input Type:** "CheckBox" (dropdown menu)
- * Response Options:** A text area with instructions: "When you choose the 'Select From Choices' response format, you need to provide some response options from which job seekers can choose. To enter the options use the input area below." Below this are two columns: "Response Option" and "Points". There are four rows of options: "MS Word", "MS Excel", "MS Access", and "MS Outlook", each with a "Points" field and a "Sort" field. To the right of each row are up/down arrow icons and a "DELETE" link.
- * Required Question:** "No" (dropdown menu)
- Confidential:** A checkbox with the text "Check here if this question is confidential."

 At the bottom right of the form is a "Save" button.

25. Click on the 'Save' button (you are now at the list of available supplemental questions in the item bank)

26. Click on the 'Add' link in the 'basket' column for the questions you wish to associate to your job posting

A screenshot of a table listing supplemental questions. The table has columns for "Type", "Item", "Basket", and "Action". There are 8 rows of questions. The "Basket" column contains "Add" links for each row. The "Action" column contains "Edit" and "Delete" links for each row. A black arrow points to the "Add" link in the "Basket" column for the question "What software programs are you proficient in using?".

Type	Item	Basket	Action
Miscellaneous	Can you lift 150 pounds?	Add	Edit Delete
Miscellaneous	Do you have a CPA license?	Add	Edit Delete
Miscellaneous	Do you have a valid Commercial Drivers License for the State of California?	Add	Edit Delete
Miscellaneous	What is your favorite color?	Add	Edit Delete
Overall computer and clerical experience	What software programs are you proficient in using?	Add	Edit Delete
Size or type of staff supported	Describe your experience in supervising employees. Include the number and types of positions supervised for each position held.	Add	Edit Delete
Summary of Work Experience	Describe your experience answering multi-line phone systems	Add	Edit Delete
Summary of Work Experience	Describe your experience working on civil engineering projects.	Add	Edit Delete

27. When done adding the questions, Click on the 'Checkout' link in the upper-right-hand corner of the screen (the chosen questions will appear)

1 items in the basket. [Checkout](#)

Type	Item	Basket
Overall computer and...	What software programs are you proficient in using...	Remove

28. Click on your name in the upper-right-hand corner, then select 'MyHR' to verify that the posting was created successfully
29. In the top section of the 'MyHR' screen, 'Job Postings', select 'Draft' in the status dropdown. Your posting should appear. Click the 'Edit' link. Uncheck the 'Draft' box at the top, make any necessary changes and save the posting.
30. The posting will appear in the 'Job Postings' section as 'Active'.
31. Click on "Exam Number" that's listed beside the Active Posting

Michelle's HR

Active Postings
1 record found.
Page 1 of 1

Job #	Job Title	Hits			Days Adv.	Adv. To	Exam	Action
		Active	Total	Days				
00038	Maintenance Worker 1 - MC	0	0	0	0	05/31/05 05:00 PM	00038	Edit Remove

Fill out the Exam Plan Detail; Create Evaluation Steps (As Human Resources)-OPTIONAL

32. Click on the 'Add Step' link next to the 'Evaluation Steps' text

Job Posting	Add New				
Job No.	Job Title	Status	Last Updated	Assigned To	Action
Recruiting Plan Add New					
Ad Type	Ad Name	Requested Date	Start Date	End Date	Action
Evaluation Step Add Step View Applicants (0) View Applicants by Step (0) App Flow					
Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	0	

33. Select 'Training and Experience' from the 'Step Type' dropdown
34. Step Name type in "Training and Experience"
35. Display Candidate Status As (candidate will see this information when they gone online to check the status of their application)
36. Select the 'Pass/Fail' radio button

37. Click on the 'Save' button

* Required

* Step Type: Training and Experience

Step Name: Training and Experience

* Evaluate On: Scored Pass/Fail

Comments

Save

You are done adding the job posting and supplemental questions, now it is time to apply for the position.

Apply for the position online (As an Applicant)

38. Log in to trainingagency.neogov.com/sc/default.cfm

39. Click on the job posting title

Click on the job posting title ←

2 records found.

Page 1 of 1 ←

Position	Emp Type	Salary	Filing Date
ADMINISTRATIVE MANAGER I	FTE - Full-Time	\$44,382.00 - \$82,109.00 annually	06/21/07
Directs or manages administrative and/or business management activities of a state agency or major c...			
COMMUNICATIONS SPECIALIST	FTE - Full-Time	\$20,248.00 - \$37,466.00 annually	06/20/07
Coordinates telecommunications services for an assigned geographic area of the			

state or performs adv...

40. Click on the 'Apply' link



Create an Application (As an Applicant)

- Click on 'Create Your Account Here!'



- Enter your new account information (you MUST remember this information)
 - Write your username and password here: _____ / _____

- Click on the 'Save' button

GovernmentJobs

Home Job Search Career Seekers About Us Post a Job Employer Login

Request New Job Seeker Account

Enter your account information:

Username

Tip: Choose a Username that you can easily remember. You may use letters and numbers and the underscore "_". Example: john_doe25

Email Address

Create a Password:

Password

Confirm Password

Password Hint

Tip: If you forget your password, you can click on [Lost Password](#) and it will be emailed to you.

- A page is displayed with your login information. Click on the 'Login' button
- Enter your username and password and click 'Login'

41. Click on the 'Create Application' button

GovernmentJobs

Home Job Search About Us Help Logout

Welcome,

Main Menu	Search Jobs	Application Status	My Account
- Main Menu	- Saved Jobs - Saved Agents	- Application Status - myInbox	- Change Password

In order to apply for a position you need to create an application first. Click on the **'Create Application'** button and we'll guide you through the process.

Applications You've Created:

Name	Date Created	Modify
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Tip: You do NOT need to recreate a new application every time you're applying for a position.

42. "Application Name" - input a title for your application (it does not matter what you type in)

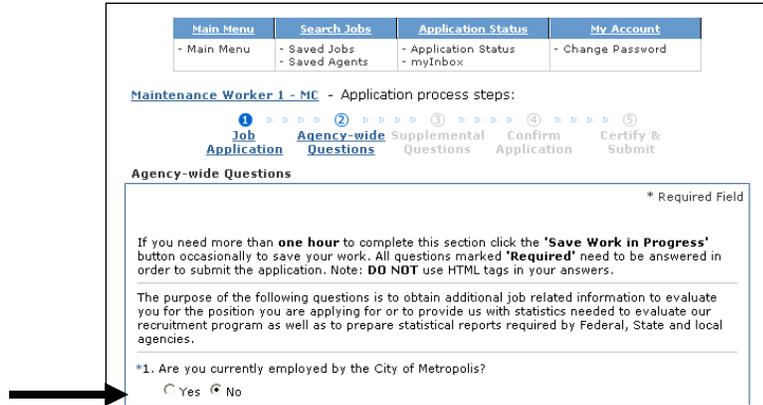
43. Click on the 'Create Application' button

44. Fill in the 'Personal Profile' information

45. Click on the 'Save & View Application' button

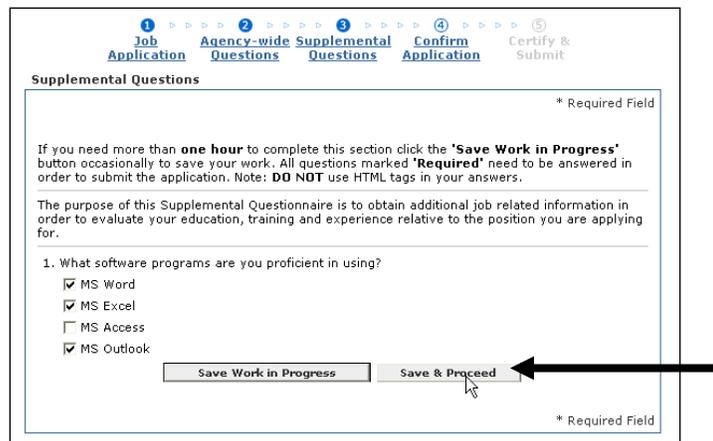
46. Complete at least one record in the 'Education History' and 'Work Experience' sections (click the 'save' button at the bottom of each section)

47. Answer the agency-wide supplemental questions



48. Click on the 'Save & Proceed' button at the bottom of the page

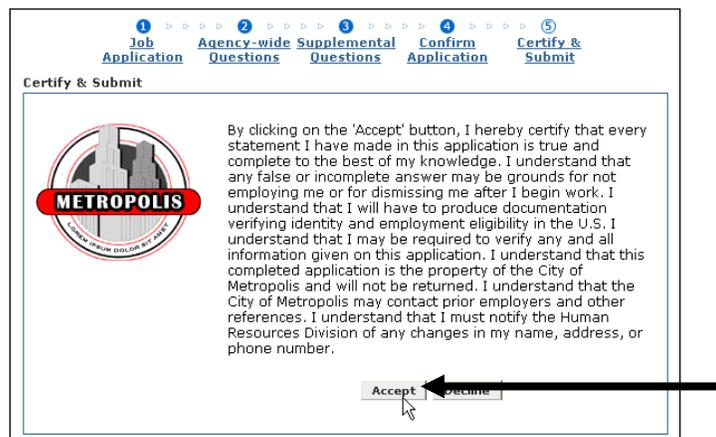
49. Answer the job-specific supplemental questions (if any)



50. Click on the 'Save & Proceed' button at the bottom of the page

51. Scroll to the bottom of the application review screen and click 'Confirm & Send Application'

52. Click the 'Accept' button on the digital signature screen



You are done applying for this position online.

Printable Application – After submitting their applications, applicants can click on the 'Application Status' menu and select the 'view' link next to the application.

Job Title	Organization	Applied	View App.	Status	Schedule
Accountant I- JH	Utopia, CA	03/28/06	View	Conducting Oral Exams	
Accountant I- JH	Utopia, CA	03/23/06	View	Application Received	
TEST - Job Posting Only Jack/Jill of all trades	Utopia, CA	03/21/06	View	Application Received	
Teacher-JH	Utopia, CA	03/21/06	View	Conducting Oral Exams	

53. Click the link for a printable version of the application.

Accountant I- JH			
Personal Profile			
Name:	Joanne Utopia	Address:	222 N Sepulveda Blvd El Segundo, California 90245
		Email:	joanne@neogov.com
Home Phone:		Notification Preference:	Email
Former Last Name:		Alternate Phone:	
		Month and Day of Birth:	01/01

54. Click on the 'Logout' link in the upper-right-hand corner

Input a paper application (As Human Resources)

55. Go to: training.neogov.com

56. Click on the 'Login' link in the upper-right-hand corner

57. Enter your Human Resources Username and Password

58. Select the '**Insight – Human Resources**' radio button, click login

59. Select 'App Entry' from the '**CandidateTrack**' dropdown

Class	Post	Admin	Benefits	Reports	CandidateTrack	Tests	Requisitions	List
Welcome, Michelle Cline								
Active Postings 1 record found. Page 1 of 1								
Job #	Job Title			Days Adv.	Adv.	Adv.	To	
00038	Maintenance Worker			0	05/31/05	05:00	PM	
Draft Postings								

60. Fill out the required information on the screen and click 'Save'

* Required

Job Number:	00038	Find Job Posting
* Job Posting:	Maintenance Worker 1 - MC [00038]	
Social Security Number:	549239598	Search
* Date Received:	April	27
* Time Received:	3 pm	:38
* First Name:	Fernando	
Middle Initial:	L	
* Last Name:	Ortega	
* Address:	2359 Smithrock Blvd	
* City:	Metropolis	
* State:	California	
* Zip Code:	90245	

61. Fill out the agency-wide supplemental questions and click 'Save'

* Required

Personal Profile	Agency-Wide Questions	Job-Specific Questions	Attachment
* 1. Are you currently employed by the City of Metropolis?			
		<input type="radio"/> Yes <input checked="" type="radio"/> No	
2. If you answered 'yes' to #1, please indicate where you currently work at the City of Metropolis. Include the department, your position, and your supervisor's name.			
		n/a	
3. Gender:			
		<input checked="" type="radio"/> Male <input type="radio"/> Female	
4. Ethnicity:			
		<input type="radio"/> White <input type="radio"/> Black <input checked="" type="radio"/> Hispanic <input type="radio"/> Asian/Pacific Islander <input type="radio"/> American Indian/Alaskan Native	
5. Age Group:			
		<input type="radio"/> Under 18 years of age <input checked="" type="radio"/> 18 - 40 years of age <input type="radio"/> Over 40 years of age	
6. Have you ever been convicted of a felony?			
		No	
7. Have you ever been dismissed from a job?			
		No	
8. Military Status?			
		N/A	
9. If you worked for Metropolis previously, please provide your employee identification number if you know it.			
		n/a	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

62. Fill out the job-specific supplemental questions and click 'Save'

* Required

Personal Profile	Agency-Wide Questions	Job-Specific Questions	Attachment
1. What software programs are you proficient in using?			
		<input checked="" type="checkbox"/> MS Word <input type="checkbox"/> MS Excel <input type="checkbox"/> MS Access <input checked="" type="checkbox"/> MS Outlook	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

63. We do not have a .PDF version of an application, so click 'Save & Exit App Entry'

64. Click on your name in upper right hand corner, then select 'MyHR'

Move Applicants Through Evaluation Steps/Screen (As Human Resources)

65. From the My HR screen, in the 'Requisitions' section, click on the appropriate exam number in the 'Exam' column

Michelle's HR

Active Postings
1 record found.
Page 1 of 1

Apps.								
Job #	Job Title	Hits	Active	Total	Days Adv.	Adv. To	Exam	Action
00038	Maintenance Worker 1 - MC	1	2	2	0	05/31/05 05:00 PM	00038	Edit Remove

Draft Postings
No records found.

Job #	Job Title	Last Updated	Posting	Class Spec	Exam	Action
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Inactive Postings
3 records found.
Page 1 of 1

Job #	Job Title	Last Updated	Posting	Class Spec	Exam	Action
00013	9-1-1 Calltaker/Dispatcher	04/13/05	Add Posting	View Spec	00013	Edit Delete
00021	HR Manager	04/27/05	Add Posting	View Spec	00021	Edit Delete
00025	Zookeeper	04/11/05	Add Posting	View Spec	00025	Edit Delete

Open Requisitions
4 records found.
Page 1 of 1

Req #	Req. Title	Department	Rcvd.	Exam	# Ref.	Action
00013	Communications Specialist	Public Works	01/11/05	00013	0	Authorize Edit
00021	Human Resources Manager	Human Resources	02/02/05	00021	4	Authorize Edit
00038	Maintenance Worker 1	Public Works	04/27/05	00038	0	Authorize Edit
00025	Zookeeper	Parks & Recreation	04/03/05	00025	0	Authorize Edit

66. Click on the 'View Applicants By Step' link

Job Posting

Job No.	Job Title	Status	Last Updated	Assigned To	Action
00038	Maintenance Worker 1 - MC	Adv. To 05/31/05	04/27/05	Michelle Cline	Edit Delete

Recruiting Plan [Add New](#)

Ad Type	Ad Name	Requested Date	Start Date	End Date	Action
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Evaluation Steps [Add Step](#) [View Applicants \(2\)](#) [View Applicants by Step \(1\)](#)

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	2	
Step 2	Training and Experience	N/A	View Results	0	Edit Delete

67. Under **Step 1**, select 'Change Disposition' from the 'Select Action' dropdown

68. Select 'All' from the 'Select Candidate(s)' dropdown

69. Click on the 'Go' icon to the right

Step 1: Application Received
2 records found.

Candidate	SSN	Master Profile	Disposition	Email Notify	Source	Received	Notices
<input type="checkbox"/> Hanson, Ross	544-46-4999	View	N/A	<input type="checkbox"/>	Online	04/27/05 06:22 PM	N/A
<input type="checkbox"/> Ortega, Fernando	549-23-9598	View	N/A	<input type="checkbox"/>	Paper	04/27/05 03:38 PM	N/A

Select Action:

Select Candidate(s):

Go

70. Select the 'Passed' radio option

71. Click on the 'Save' button

The screenshot shows a form titled '* Required'. It contains the following fields:

- Applicant:** A table with columns 'Name' and 'SSN'.

Name	SSN
Hanson, Ross	544-46-4999
Ortega, Fernando	549-23-9598
- Pass/Fail Step:** Radio buttons for 'Passed' (selected), 'Failed', and 'Other'.
- Reject Reason:** A dropdown menu with the text '== Select =='.
- Comments:** A text area.
- Save:** A button at the bottom right, highlighted by a black arrow.

72. Select 'Advance to Next Step' from the 'Select Action' dropdown

73. Select 'Passing' from the 'Select Candidate(s)' dropdown

74. Click on the 'Go' icon to the right

The screenshot shows a table with the following data:

Candidate	SSN	Master Profile	Disposition	Email Notify	Source	Received	Notices
<input type="checkbox"/> Hanson, Ross	544-46-4999	View	Pass	•	Online	04/27/05 06:22 PM	N/A
<input type="checkbox"/> Ortega, Fernando	549-23-9598	View	Pass	•	Paper	04/27/05 03:38 PM	N/A

Below the table are two dropdown menus: 'Select Action' with 'Advance to Next Step' selected, and 'Select Candidate(s)' with 'Passing' selected. A red 'Go' button is located to the right of the second dropdown. Arrows point to these three elements.

75. Under **Step 2**, click on the candidate name link for the first applicant in the list (their application should show up)

76. Click on the 'Show Candidate Disposition' link in the upper-right-hand corner

The screenshot shows a candidate profile for '00038 - Maintenance Worker 1 - MC'. At the top right, there is a link 'Show Candidate Disposition' with a mouse cursor over it, highlighted by a black arrow. Below the link are 'Print View' and 'Next Applicant' links. The profile details are as follows:

Personal Profile			
Name:	Ross J Hanson	Address:	222 N. Sepulveda Blvd El Segundo, California 90245
Social Security:	544-46-4999	Email:	ross@neogov.com
Home Phone:	(310) 555-5555	Notification Preference:	Email
		Alternate Phone:	

77. Mark the disposition as follows (they may not be in this order):

- Pass the online applicant (mark disposition as passed and save)
- Fail the paper applicant (mark the applicant as failed, select a disposition, and then click save)

Exam Plan **00038 - Maintenance Worker 1 - MC**
 Evaluation Step **Training and Experience**

* Required

Applicant: Name SSN
 Hanson, Ross 544-46-4999

* Pass/Fail Step: Passed Failed Other

Reject Reason: == Select ==

Comments:

Save Save & View Next App »

78. When done marking both dispositions and saving, click on the 'Exam Plan' link at the top of the screen

Exam Plan **00038 - Maintenance Worker 1 - MC**
 Evaluation Step **Training and Experience**

Disposition Updated Successfully * Required

Applicant: Name SSN
 Ortega, Fernando 549-23-9598

* Pass/Fail Step: Passed Failed Other

Reject Reason: Does not meet minimum qualifications

Comments:

79. Click on the 'View Applicants By Step' link (notice that there is one passing and one failing applicant)

Step 2: Training and Experience
 2 records found.

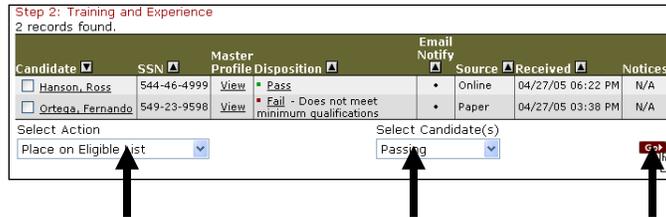
Candidate	SSN	Master Profile	Disposition
<input type="checkbox"/> Hanson, Ross	544-46-4999	View	<input checked="" type="checkbox"/> Pass
<input type="checkbox"/> Ortega, Fernando	549-23-9598	View	<input checked="" type="checkbox"/> Fail - Does not meet minimum qualifications

Place Applicants on the Eligible List (As Human Resources)

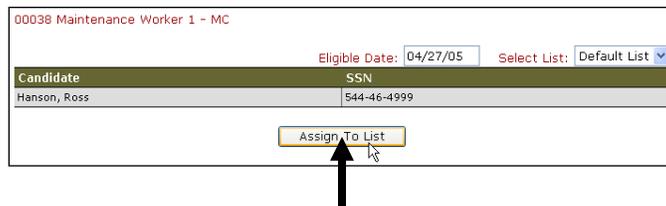
80. Select 'Place on Eligible List' from the 'Select Action' dropdown

81. Select 'Passing' from the 'Select Candidate(s)' dropdown

82. Click on the 'Go' icon to the right



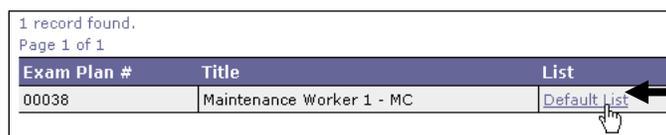
83. Click on the 'Assign to List' button



84. Click on the 'Eligible List' link on the 'View Applicants by Step' screen



85. Click on the 'Default List' link on the 'Eligible List' screen (you will now view one name on the eligible list)



Maintenance Worker 1 - MC: Default List

[View Exam Plan](#) [Show Evaluation Steps](#) [Show Ranks Sequentially](#) [Show Referrals](#)

1 candidates on list.

Candidate	SSN	Total Rank	Total Score	Exam Rank	Exam Score	Date Eligible	Days Svc	Email Notify	Waivers Used	Status	Expires
<input type="checkbox"/> Hanson, Ross	544-46-4999	1	0.00	1	0.00	04/27/05		*		Active	

Select Action: Select Candidate(s):

Refer Applicants to the Hiring Managers (As Human Resources)

- 86. Select 'Refer' from the 'Select Action' dropdown
- 87. Select 'All Candidates' from the 'Select Candidate(s)' dropdown
- 88. Select 'Requisition' from the 'Select Requisition' dropdown
- 89. Click on the 'Go' icon

Maintenance Worker 1 - MC: Default List

[View Exam Plan](#) [Show Evaluation Steps](#) [Show Ranks Sequentially](#) [Show Referrals](#)

1 candidates on list.

Candidate	SSN	Total Rank	Total Score	Exam Rank	Exam Score	Date Eligible	Days Svc	Email Notify	Waivers Used	Status	Expires
<input type="checkbox"/> Hanson, Ross	544-46-4999	1	0.00	1	0.00	04/27/05		*		Active	

Select Action: Select Candidate(s):

Click on the 'Refer' button (this action will refer the chosen applicants electronically to the Hiring Managers)

Comments (will be displayed on referred list that Hiring Manager sees):

To Use Batch Req. Select: Choose a requisition in the box below to automatically select that requisition for all candidates on this page that are eligible for referral to that requisition (if one or more candidates are not eligible to be referred to the requisition you selected, that requisition will not appear in their respective 'Requisition' drop-down, and it will not be selected for them). Note: you must click on the 'Refer' button to complete the referral(s).

Candidate	Person ID	Rank	Total Score	Requisition
Applicant, Joe	157389	1	81.73	00034 - Human Resource Manager
Jones, Mary	157639	2	72.43	00034 - Human Resource Manager
Jones, Kevin	157669	3	71.37	00034 - Human Resource Manager
Alexander, Barry	156753	5	66.43	00034 - Human Resource Manager

View Referred Candidates/Mark as Hired (As a Hiring Manager/Supervisor)

- 90. Click 'NEOGOV In' in upper left hand corner and click 'OHC'
- 91. Click your name in upper right hand corner and select 'My List' (this will display all referred lists for this Hiring Manager)
- 92. Click on the 'View' link in the 'Candidates' column for the applicable requisition

Req #	Title	Department	Division	Hiring Mgr	Candidates
00038	Maintenance Worker 1	Public Works	Maintenance	Smith, C.	View

- 93. Check box beside candidate's name
- 94. Select 'Hire' from the 'Action' dropdown
- 95. Click on the 'Go' icon

Name	Phone	Application	Exam Plan	Referred Date	Interview	Offer	Action
Hanson, Ross	P: (310) 555-5555	View	00038	04/27/05	N/A	N/A	<input type="checkbox"/> Select <input type="checkbox"/> Schedule Interview <input type="checkbox"/> Make Offer <input checked="" type="checkbox"/> Hire <input type="checkbox"/> Reject

- 96. Fill out appropriate fields
- 97. Click on 'Save and Release' button at the bottom of the screen (the applicant is now displayed in the 'Hired' section and HR now has a 'Hire Awaiting Authorization'.)

Job KC20-05 Trades Spec II

Name: Fred Flintstone
 Person ID: 162741
 Status: Hired

* Offer Date: 08/01/07
 Offer Amount: \$
 Bonus Amount: \$

* Answer Date: 08/01/07
 * Filled On Date: 08/01/07
 * Start Date: 08/01/07
 Orientation Date: 08/01/07

Keep Active on Eligible List: No

Comments:

No Approvals

Authorize a Hire and Send Notices (As Human Resources)

99. Click 'NEOGOV OHC' in upper left hand corner, then select 'Insight'
100. Scroll to bottom of the 'My HR' screen to view 'Hires'
101. Click on the Candidates name under 'Hires Awaiting Authorization'
102. Click on 'Edit' in the middle of the page on the Personnel Action Form
103. Make any necessary changes
104. Click on Save and Authorize

Fill Requisitions (As Human Resources)

105. Go back to the 'My HR' screen
106. Under the 'Requisitions' section, click "Authorize" next to the requisition
107. Change the requisition status to "Filled"
108. Click the "Save" button

Advanced Filters

Advanced Filters allow users to specify criteria and receive a listing of applicants who meet the specified criteria. Criteria used for filtering can consist of basic filter criteria from the standard application questions, agency-wide questions, job specific supplemental questions, application received date, online/paper application, notification preference, or score)

Steps to Create and Apply an Evaluation Step Filter:

1. Access MyHR
2. Select the 'Exam Plan' option from the 'CandidateTrack' dropdown menu
3. The Exam Plan screen is displayed

The screenshot shows the 'Add New Exam Plan' interface. At the top, there is a search bar with the text 'Search for exam title or exam number:' and a 'Go' button. Below the search bar, it indicates '11 records found. Page 1 of 1'. A table lists the following exam plans:

Exam #	Exam Plan	Job Posting	Action
	ACCOUNTANT (TRAINEE)	Create Posting	Edit Delete
EX ACC III	ACCOUNTANT III	Create Posting	Edit Delete
ACCIII	Accountant III	Create Posting	Edit Delete
AA V	ADMIN ASSISTANT V	Create Posting	Edit Delete
CI-1	CONSTR INSPECTOR 1	Create Posting	Edit Delete

4. Click on the Exam Plan Title for the applicable exam plan
5. The 'Exam Plan Detail' screen is displayed
6. Click on the Evaluation Steps 'View Applicants by Step' link

The screenshot displays the 'Job Posting' and 'Recruiting Plan' sections. The 'Job Posting' table shows a job with ID 00021, title 'HR Manager', status 'Expired', last updated '11/21/05', and assigned to 'Michelle Cline'. Below it, the 'Recruiting Plan' section shows an 'Add New' button and a table of evaluation steps. An arrow points from the 'View Applicants by Step (9)' link to the 'At Step' column of the evaluation steps table.

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	1	
Step 2	Minimum Qualifications - Auto Scored	0%	View Results	2	Edit Delete
Step 3	T & E - SME Review	30%	View Results	0	Edit Delete
Step 4	Written Exam	30%	View Results	6	Edit Delete
Step 5	Oral Exam/Interview	40%	View Results	0	Edit Delete

7. Choose 'Advanced Filter' from the 'Select Action' drop-down menu

8. Choose candidate(s) from the 'Select Candidate(s)' drop-down menu
9. Click 'Go'

Step 1: Application Received								
2 records found.								
Step History Step Comments								
Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source	Received	Notices
<input type="checkbox"/> Elices, Lisa	160298	View	N/A		•	Online	01/29/07 09:17 AM	N/A
<input type="checkbox"/> Q., Amy	160541	View	N/A		•	Online	03/27/07 11:21 AM	N/A

Select Action: Select Candidate(s):

10. Click on 'Add Filter'
11. Type in a name for the Filter (Job Title)
12. Select 'Supplemental Questions' under the Object dropdown
13. Select the first supplemental question under the Field dropdown
14. Select 'Equal (=)' under the Operator dropdown
15. Select your Preferred response to the question under the Value dropdown
16. To add another question, click on 'Add Condition' and repeat steps 12-15
17. Click on Save
18. Click on Apply
19. You will be returned to the 'View Applicants by Step' page and can see the filtered list of applicants within the step that you filtered:

Step 5: Oral Exam/Interview								
3 records found. THIS STEP IS FILTERED. View Filter Unfilter								
Step Comments								
Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source	Received	Notices
<input type="checkbox"/> Cline, Michelle	100781	View	N/A		•	Online	01/24/05 06:27 PM	N/A
<input type="checkbox"/> Davidovic, Damir	1	View	N/A		•	Online	01/24/05 07:04 PM	N/A
<input type="checkbox"/> Letourneau, Scott	28038	View	N/A		•	Online	01/24/05 04:53 PM	N/A

Select Action: Select Candidate(s):

Notice Templates

Add a Notification Template

1. Access 'MyHR'
2. From the 'Candidate Track' pull-down menu, select 'Notice Templates'

Name	Description	Subject	Action
Sample Template		Sample Template	Edit Delete

3. Click the 'Add New Email Template' link
4. The 'Email Template' form is displayed
5. Complete the 'Email Template' form, including:
 - **Name** – Notice template name
 - **Description** – Notice template description
 - **Subject** – Email template subject
 - **Rejection** – Associated reject reason
 - **Template** – Define the notice template text

A sample template is provided within Insight

Available automatic text fields are located and defined at the bottom of the 'Notice Template' form

* Name

Description

* Subject

Rejection

* Template

Example Template:

<Today>

<Applicant_FirstName> <Applicant_FirstName>
 <Applicant_Address1>
 <Applicant_City>, <Applicant_State> <Applicant_ZipCode>

Dear <Applicant_FirstName>:

We are sorry to inform you that your application for <Position_Title> was not accepted because it did not indicate that you met the education requirement for this position.

Any request for reconsideration must be made in writing immediately.

Very truly yours,

<Analyst_FirstName> <Analyst_LastName>
 <Agency_Name> Human Resources Department

Copy the merge field(s) below and paste it into your email template [above](#).

Available Merge Fields

Copy the merge field(s) below and paste it into your email template [above](#).

Contact Fields			
Field Name	Merge Name	Field Name	Merge Name
Contact ID	<Contact_ID>	Contact First Name	<Contact_FirstName>
Contact Last Name	<Contact_LastName>	Contact Full Name	<Contact_FullName>
Salutation	<Contact_Salutation>	Contact Title	<Contact_Title>
Contact Birthdate	<Contact_Birthdate>	Contact Department	<Contact_Department>
Contact Last Updated	<Contact_LastUpdated>		

6. Click the 'Save' button
7. The 'Notice Template' screen is displayed including the new template

Generate Email Notifications

1. Access MyHR
2. Select the 'Exam Plan' option from the 'CandidateTrack' dropdown menu
3. The Exam Plan screen is displayed

The screenshot shows the 'Add New Exam Plan' interface. At the top, there is a search bar with the text 'Search for exam title or exam number:' and a 'Go!' button. Below the search bar, it indicates '11 records found. Page 1 of 1'. The main content is a table with the following data:

Exam #	Exam Plan	Job Posting	Action
Ex ACC III	ACCOUNTANT (TRAINEE)	Create Posting	Edit Delete
ACCIII	ACCOUNTANT III	Create Posting	Edit Delete
AA V	ADMIN ASSISTANT V	Create Posting	Edit Delete
CI-I	CONSTR. INSPECTOR I	Create Posting	Edit Delete

4. Click on the Exam Plan Title for the applicable exam plan
5. The 'Exam Plan Detail' screen is displayed
6. The available Evaluation Step links are:

The screenshot shows the 'Evaluation Steps' table with the following data:

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	1	
Step 2	Training and Experience	100%	View Results	1	Edit Delete

- **Add Step** – Add an Exam Plan Evaluation Step
- ** NOTE: The following links are not available until at least one application is received for the recruitment.

- **View Applicants** – Shows the list of applicants who have applied for the recruitment
- **View Applicants by Step** – Displays all applicants at their respective evaluation step
 - View applicant disposition at each step
 - Step applicants through evaluation steps
- Generate mail merge notifications
- **App Flow** – Displays the applicant flow for the recruitment
- **Eligible List** – Displays all applicants on the eligible list

7. Click on the 'View Applicants by Step' link

- The 'View Applicants by Step' screen is displayed organized into the defined recruitment evaluation steps:



- Select 'Email Notify' from the 'Select Action' dropdown

The predefined criteria available to 'bulk' select applicants are available from the 'Select Candidate(s)' dropdown and include:

All Candidates – Automatically selects all applicants

Candidates Passed – Only applies the 'Select Action' choice to applicants whose disposition is passed

Candidates Failed – Only applies the 'Select Action' choice to applicants whose disposition is failed

Selected Candidates – Only applies the 'Select Action' choice to applicants with a check next to their name (you are not required to select this option, as this is the default action)

- Click the 'Go' icon

- The "Email Notification" screen is displayed

If among the selected applicants, there is more than one type of disposition, the appropriate mail merge notification will be generated and listed on the 'Mail Merge' screen

Accountant I

Rejection Reason Not Specified Template:

Candidate	SSN	Date & Time Received
Lisa Lee	987-65-4321	02/27/03 02:02 PM

12. Click on the 'Send Email Notification' button (the button is universal for mail merge and email notifications)
13. The 'Sent Email Notifications' screen will display all applicants who were sent email notifications.

Generate Mail Merge Notifications and Labels

1. Access 'MyHR'
2. Select the 'Exam Plan' option from the 'CandidateTrack' dropdown menu
3. The Exam Plan screen is displayed

Add New Exam Plan

Search for exam title or exam number:

11 records found.
Page 1 of 1

Exam #	Exam Plan	Job Posting	Action
	ACCOUNTANT (TRAINEE)	Create Posting	Edit Delete
EX ACC III	ACCOUNTANT III	Create Posting	Edit Delete
ACCIII	Accountant III	Create Posting	Edit Delete
AA V	ADMIN ASSISTANT V	Create Posting	Edit Delete
CI-I	CONSTR. INSPECTOR I	Create Posting	Edit Delete



4. Click on the Exam Plan Title for the applicable exam plan
5. The 'Exam Plan Detail' screen is displayed

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	1	
Step 2	Training and Experience	100%	View Results	1	Edit Delete

6. The available Evaluation Step links are:

- **Add Step** – Add an Exam Plan Evaluation Step



** NOTE: The following links are not available until at least one application is received for the recruitment.

- **View Applicants** – Shows the list of applicants who have applied for the recruitment
- **View Applicants by Step** – Displays all applicants at their respective evaluation step
 - View applicant disposition at each step
 - Step applicants through evaluation steps
 - Generate mail merge notifications
- **App Flow** – Displays the applicant flow for the recruitment
- **Eligible List** – Displays all applicants on the eligible list

7. Click on the 'View Applicants by Step' link

8. The 'View Applicants by Step' screen is displayed organized into the defined recruitment evaluation steps



9. Select 'Mail Merge & Mailing Labels' from the 'Select Action' dropdown

The predefined criteria available to 'bulk' select applicants are available from the 'Select Candidate(s)' dropdown and include:

- **All Candidates** – Automatically selects all applicants

- **Candidates Passed** – Only applies the ‘Select Action’ choice to applicants whose disposition is passed
- **Candidates Failed** – Only applies the ‘Select Action’ choice to applicants whose disposition is failed
- **Selected Candidates** – Only applies the ‘Select Action’ choice to applicants with a check next to their name (you are not required to select this option, as this is the default action)

10. Click the ‘Go’ icon

11. The ‘Mail Merge’ screen is displayed

If among the selected applicants, there is more than one type of disposition, the appropriate mail merge notification will be generated and listed on the ‘Mail Merge’ screen

Candidate	SSN	Date & Time Received
Lisa Lee	987-65-4321	02/27/03 02:02 PM

Send Email Notifications

12. Click on the ‘Send Email Notification’ button (the button is universal for mail merge and email notifications)

Template Name	Candidates	Mail Merge	Mailing Labels
Template Name	1		

13. To generate the hardcopy mail merge notifications, click the Microsoft Word icon in the ‘Mail Merge’ column

*To generate the mail merge mailing labels, click the Microsoft Word icon in the ‘Mailing Labels’ column

*Mailing labels are formatted for Avery #5262 (1-1/3" x 4", 14 labels per sheet)

14. The File Download window is displayed

15. Click the ‘Open’ button

16. Click 'Save' to save the file to your computer or network
17. The hardcopy mail merge notifications are displayed
18. To print the notifications, click on the  icon within the Internet Browser icon bar

Getting Applications from NEOGOV (Insight-HR) to Hiring Managers

1. Log in to training.neogov.com
2. Click on “Log In” in the upper right hand corner of screen
3. Type in Username and Password
4. Select the “Insight-Human Resources” radio button
5. Click “Log-In”
6. Under “Candidate Track” at the top of the screen, select “Active”
7. Locate your job posting title
8. Click “Print” under the Applications column
9. Fill in “Start Date” and “End Date” (These are the dates when the applications were received. Allows you to pull only applications that you need)
10. Select “Download Type”
11. Select “Source”
12. Select “Processing Type”
13. Click on “Download Now”
14. If you need to download all applications, click on “Download All Applications”
15. If you need to download specific applications, click on the check box beside the applicants’ names, and then click on “Download Selected Applications”
16. If you selected “PDF Batch” as the “Processing Type,” you will receive an email from NEOGOV to inform you that your batch is ready
 - a. Go back to “Candidate Track” and “Active”
 - b. Locate the posting
 - c. Click on the Batch link
17. Print applications or save the applications as a HTML or PDF file in your computer to send as an attachment through email

Glossary

<u>Agency-wide Questions</u> (Statewide questions)	These questions are required to be asked by all State Agencies on a statewide basis. They may include questions related to the following areas: Gender, Ethnicity, Age Group, Conviction record, Nepotism, etc.
<u>Applicant Master Record</u>	The primary and most current record of demographic information for an applicant including name, address, phone, e-mail, gender ethnicity, etc. The applicant master record is updated each time an applicant submits an application. Both e-mail and hard-copy notices use the mailing address or e-mail address that is stored in the applicant master record to ensure that the notice is sent to the most recent address provided by the applicant. HR Users also have the ability to edit the applicant master record without editing an applicant's application.
<u>Approver</u>	A department (Agency) user who can approve or deny requisitions that have been routed to him/her for approval.
<u>Benefit Code</u>	The benefit language that is included on the job posting is based on the benefit code that is assigned to the job classification of the posting. This means that every posting for a particular job classification will have the same benefit language, so the benefit descriptions that are set up for each benefit code need to be written so that they would apply to every job within a classification that the benefit code is assigned to. If you use the same generic benefits language on every job posting, then you only need one code. If you have different language that you use for different jobs, then you would want to have separate benefit codes for each. You can also use HTML tags to insert links to other web pages right in the text of the benefits description, if desired. So, if you want to provide a link to a web page that has more detailed explanation of benefits provided, you can do that.
<u>Class Spec</u>	A description of a grouping of similar jobs that are defined under a single job classification. The Class Spec within Insight includes a class code (class number), class title, the salary, benefit group, bargaining unit, EEO code, FLSA status, etc. In addition, a detailed description of the job classification can be maintained within Insight including a summary of the job classification, detailed

	listing of job duties, minimum requirements and knowledge, skills, and abilities required for the position.
<u>Department Users</u> (Hiring Managers/Supervisors)	Hiring managers/supervisors who are authorized to login to the online hiring center to create requisitions, approve requisitions, review applications as a subject matter expert and/or review referred applicants as a hiring manager.
<u>Departments</u> (Agencies)	The major organizational breakdowns within an organization.
<u>Divisions</u> (Divisions within an agency)	The organization breakdown of a department. The set-up of divisions is optional in Insight. In Insight Enterprise, it is used to narrow the list of available hiring managers and approvers in the creation of a Requisition
<u>EEO Category</u>	These are the categories each classification is assigned to for the federal EEO-4 report. The category list is maintained by NEOGOV and includes values such as Professionals, Paraprofessionals, Technicians, Officials & Administrators, etc.
<u>Eligible List</u>	List of applicants who have passed all evaluation steps and are eligible to be referred (certified) to hiring managers for hire.
<u>Exam Plan</u> (Recruitment Plan)	An Exam Plan is the comprehensive plan of all recruitment and selection activities related to a job posting. Contents include: job posting, recruiting (advertising) plan, evaluation steps (minimum qualifications review, training & experience review, exams, etc.), all applications and status of applicants, eligible lists, tasks and notes, and attached files.
<u>Hiring Manager</u>	An agency manager/supervisor (OHC user) who can view referred applicants from an eligible list and take action to interview, offer, hire, or reject an applicant.
<u>HR Users</u>	Users (Recruiters/HR Analysts) who are authorized to login to Insight to access postings, applications and other exam plan-related items.
<u>Insight</u>	Insight is the portion of the Insight Enterprise suite used by HR Users to access postings,

	applications, and other exam-plan related information. Insight also includes a reporting component.
<u>Interest Card</u>	A record of an applicant's request to be notified of job postings that become open for jobs within a specific classification or posting category. Applicants access the interest cards through the job classification web page. Interest cards are maintained for twelve months or until the applicant unsubscribes from the interest card list, whichever comes first.
<u>Locations</u>	The work location to be displayed to applicants on a job posting. When creating a job posting, the recruiter must specify exactly one location. Physical job location.
<u>Notices</u>	E-mail or hard copy letters to applicants that an HR user can create for applicants within the evaluation steps or eligible list sections of an exam plan. Notices are created from user-defined notice templates. Notice templates are accessed via Candidate Track Notice Templates.
<u>Online Hiring Center (OHC) – Agency Hiring Manager/Supervisor</u>	The Online Hiring Center (OHC) is the portion of Insight Enterprise where users in hiring departments login to the system as department users to create requisitions approve requisitions, review applications as a subject matter expert and/or review referred applicants as a hiring manager.
<u>Originator</u>	Hiring manager/supervisor (OHC user) who can create requisitions and cannot view any other user's requisitions.
<u>Referred List</u>	List of eligible applicants who have been sent (referred) to a hiring manager. Applicants are referred to a requisition which specifies who the hiring manager is. Applicants on an eligible list can be referred to multiple requisitions.
<u>Requisition</u>	A request to fill a position or positions. Completed by a hiring manager/supervisor in the hiring department. The requisition specifies the hiring manager for the position to be filled which determines who will receive the referred list of eligible candidates. Requisitions can be routed automatically for approval by using

	Department Approval Groups.
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