E-Recruitment

Training Guide

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) • 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

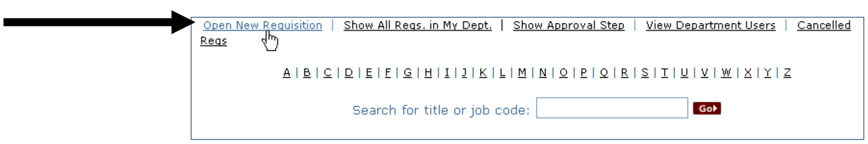
Step in Recruitment Cycle	Access / Role
Referred Candidates: Make Offers	HR/Agency Hiring Manager/Supervisor (May differ by agency) HR Liaison or Originator
★ Referred Candidates: Add Comments for FOIA for top 3 candidates	Agency Hiring Manager/Supervisor (May differ by agency) HR Liaison or Originator
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

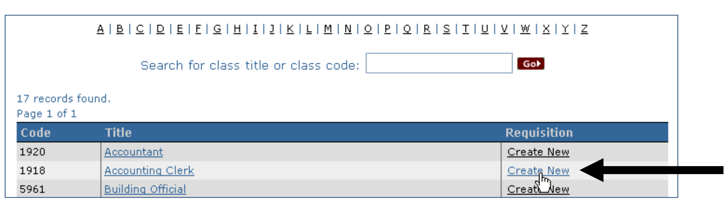
Create a Requisition (As a Hiring Manager/Supervisor)

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

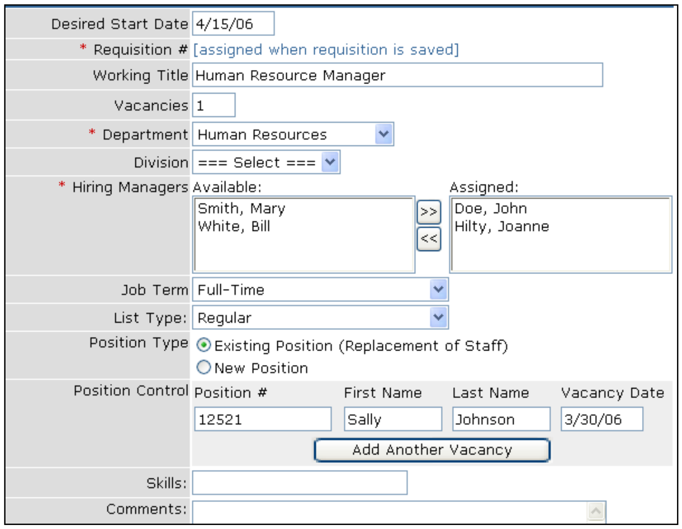
5. Click on 'Open New Requisition'



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)



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



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;

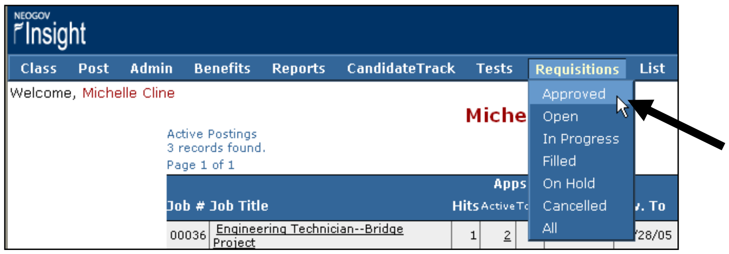
Note: The Approval process is used by the Hiring Manager/Supervisor to obtain the necessary on-line approvals when required.

Assign a Requisition, (As Human Resources)

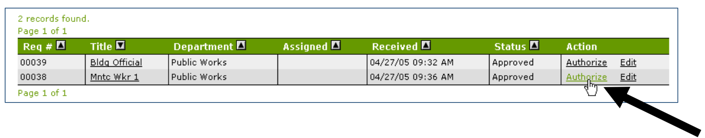
11. Click the ‘NEOGOV OHC’ tab in the upper left corner

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.)

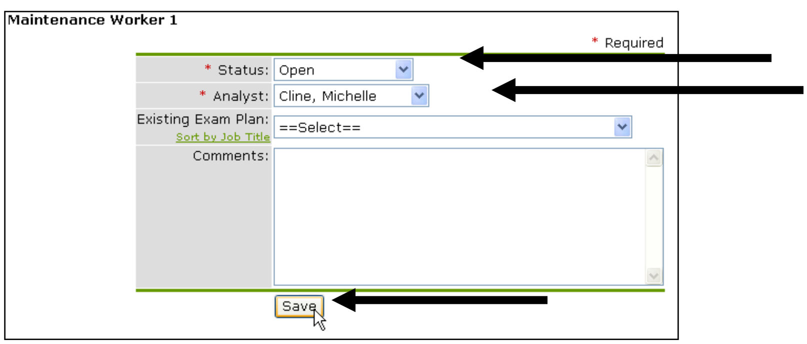


14. Click the ‘Authorize’ link next to the requisition you are working on



- 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

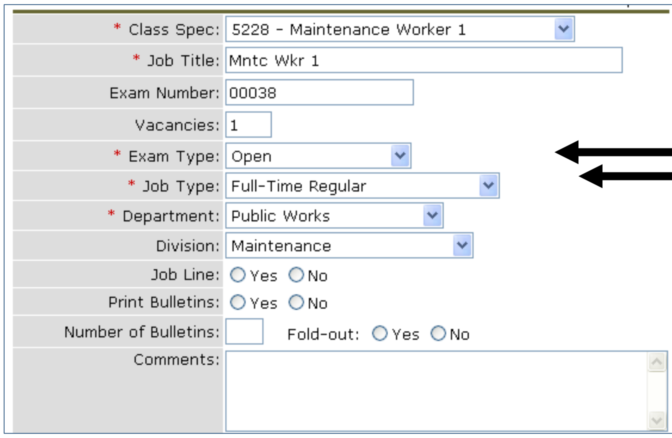


16. Click on your name in upper right hand corner, then select ‘My HR’

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’

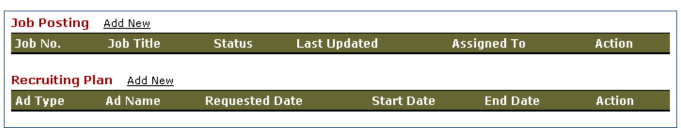
18. Click on the ‘Create Exam’ link next to your requisition

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



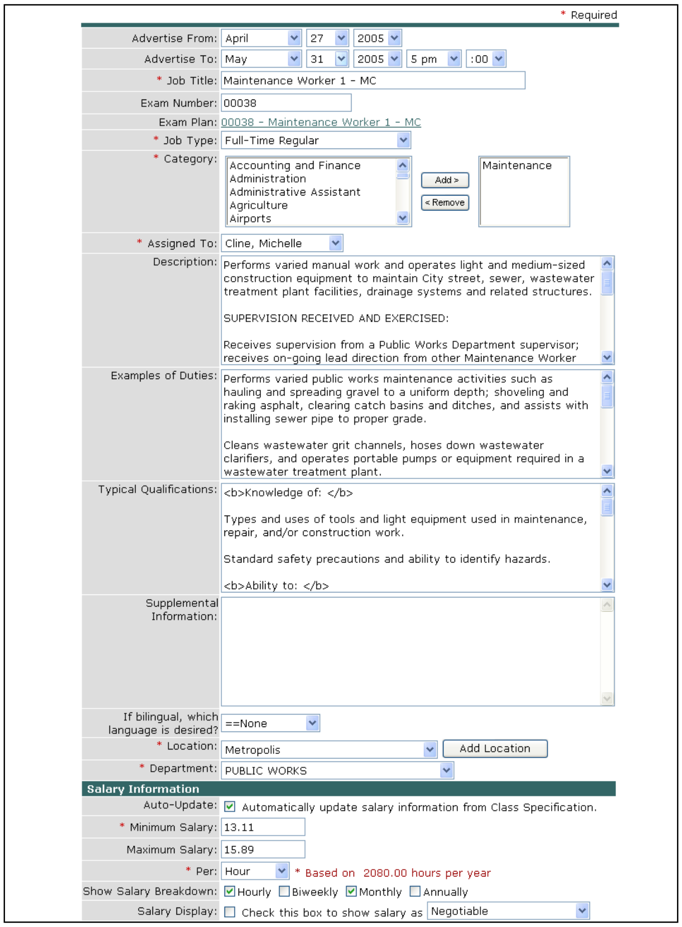
Create Job Posting (As Human Resources)

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

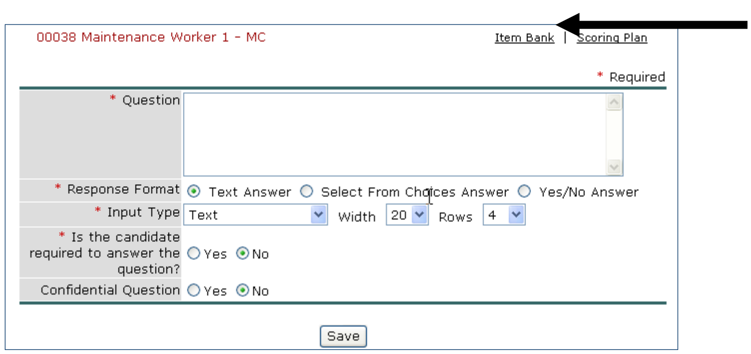


21. Fill out the job posting form

- 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.)

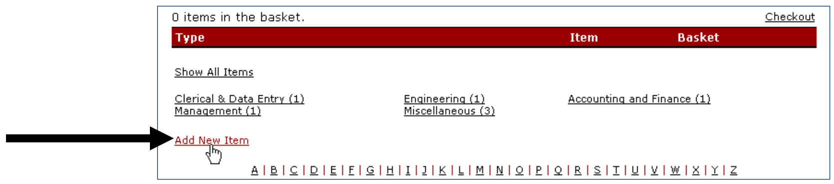


22. Click on the ‘Item Bank’ link in the upper-right-hand corner

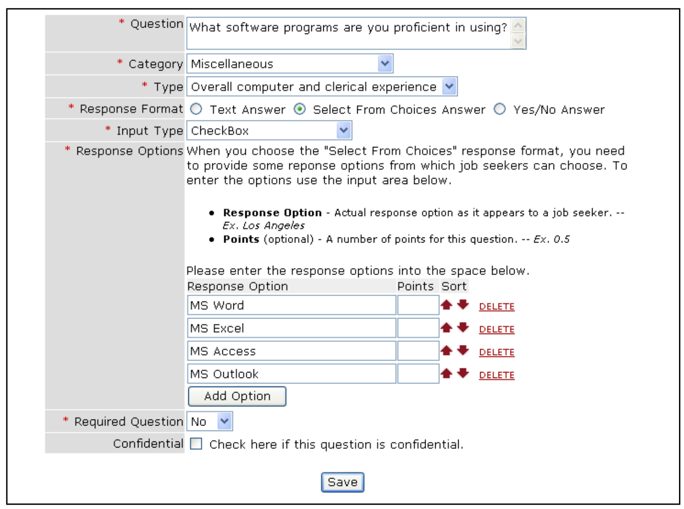


Note: Supplemental Question Screen (1 time question only)

23. Click on the ‘Add New Item’ link

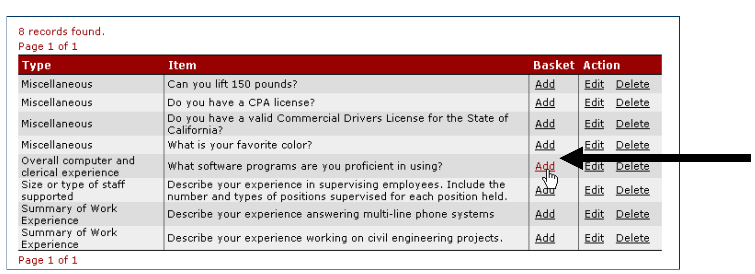


24. Fill in the supplemental question form (you must input information in every field with a red asterisk next to it)

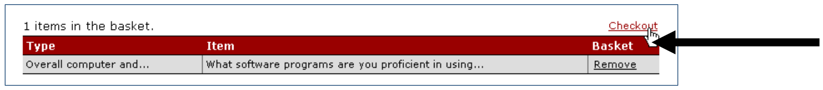


25. Click on the ‘Save’ button (you are now at the list of available supplemental questions in the item bank)

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



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)



28. Click on your name in the upper-right-hand corner, then select 'MyHR' to verify that the posting was created successfully

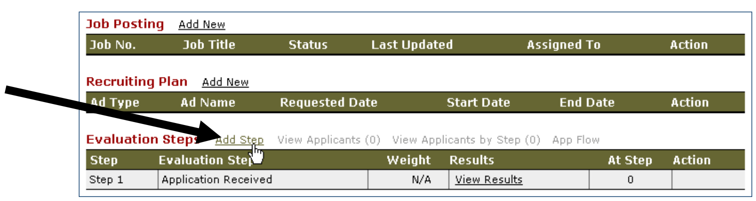
29. In the top section of the 'MyHR' screen, 'Job Postings', select 'Draft' in the status dropdown. Your posting should appear. Click the 'Edit' link. Uncheck the 'Draft' box at the top, make any necessary changes and save the posting.

30. The posting will appear in the 'Job Postings' section as 'Active'.

31. Click on "Exam Number" that's listed beside the Active Posting

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

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



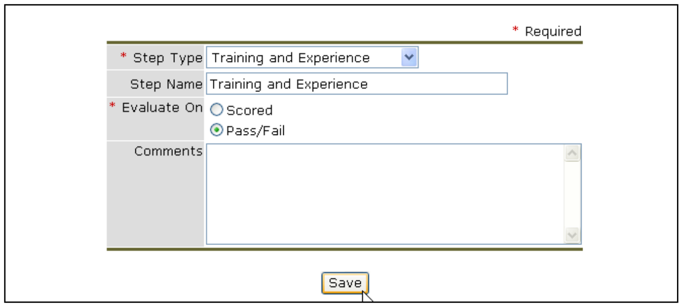
33. Select 'Training and Experience' from the 'Step Type' dropdown

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



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

<u>Apply for the position online (As an Applicant)</u>

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

39. Click on the job posting title

<u>Click on the job posting title</u>

2 records found.

Page 1 of 1

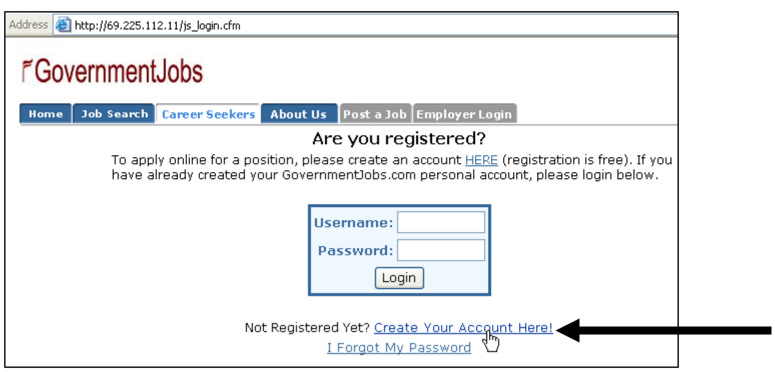
Position	Emp. Type	Salary	Filing Date
ADMINISTRATIVE MANAGER I	FTE - Full-Time	$44,382.00 - $82,109.00 annually	06/21/07
Directs or manages administrative and/or business management activities of a state agency or major c...			
COMMUNICATIONS SPECIALIST	FTE - Full-Time	$20,248.00 - $37,466.00 annually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

state or performs adv...

40. Click on the ‘Apply’ link

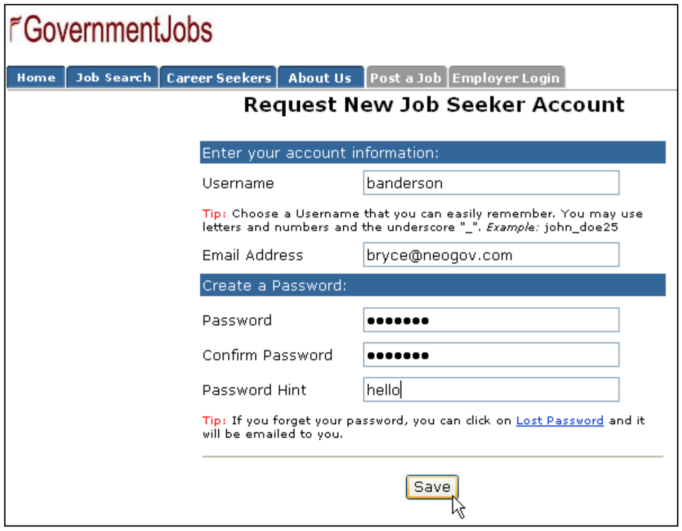
Create an Application (As an Applicant)

- Click on ‘Create Your Account Here!’



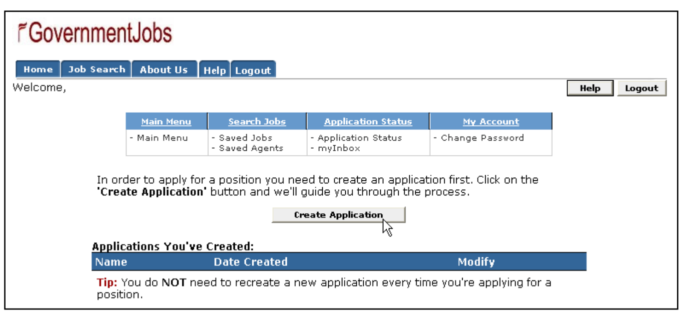
- Enter your new account information (you MUST remember this information)
  - **Write your username and password here:________________/________________**

- Click on the ‘Save’ button



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

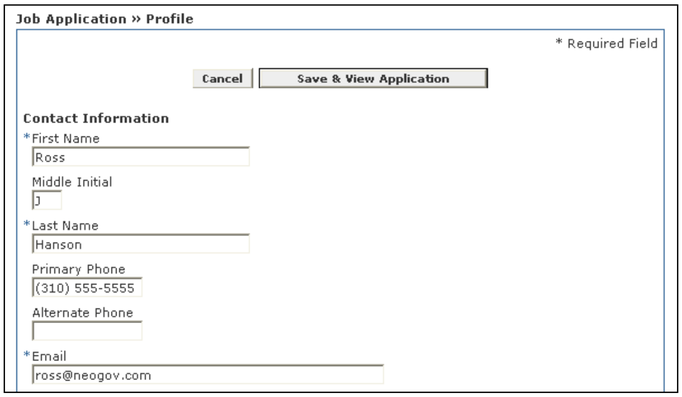
41. Click on the ‘Create Application’ button



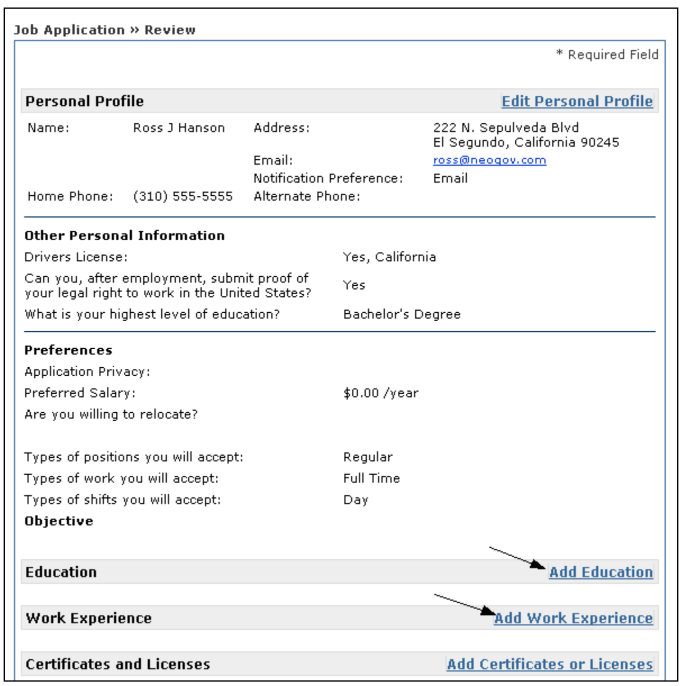
42. “Application Name” - input a title for your application (it does not matter what you type in)

43. Click on the ‘Create Application’ button

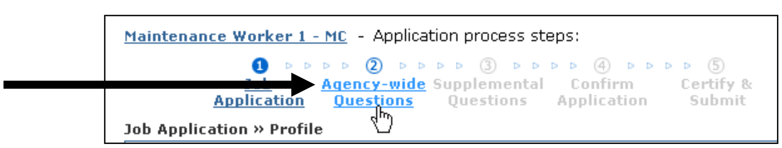
44. Fill in the 'Personal Profile' information

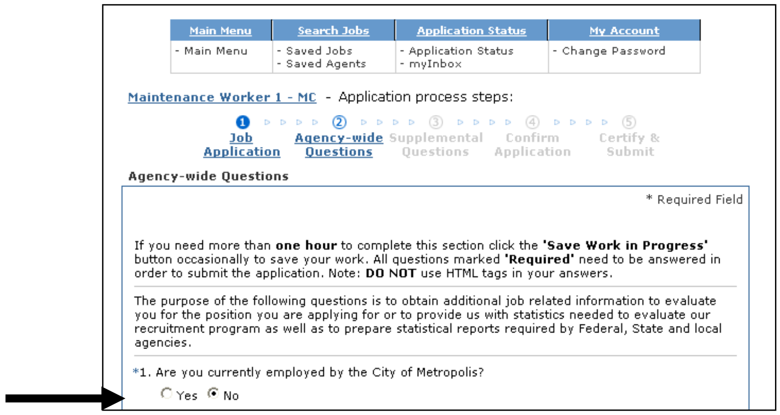


45. Click on the 'Save & View Application' button
46. Complete at least one record in the 'Education History' and 'Work Experience' sections (click the 'save' button at the bottom of each section)

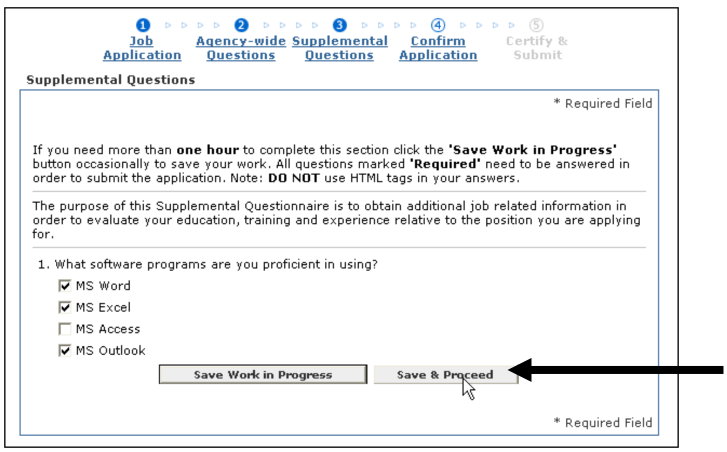


47. Answer the agency-wide supplemental questions

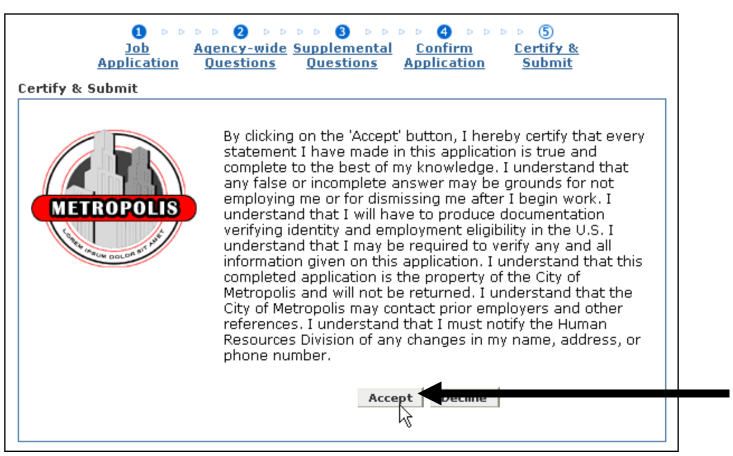




48. Click on the ‘Save & Proceed’ button at the bottom of the page
49. Answer the job-specific supplemental questions (if any)

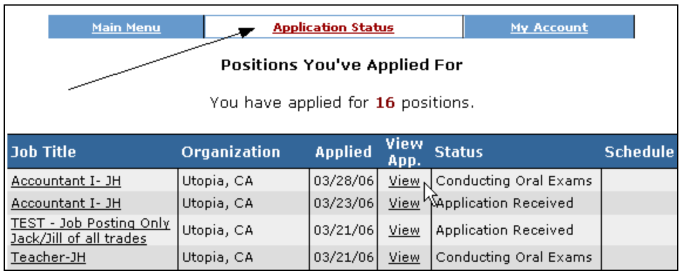


50. Click on the ‘Save & Proceed’ button at the bottom of the page
51. Scroll to the bottom of the application review screen and click ‘Confirm & Send Application’
52. Click the ‘Accept’ button on the digital signature screen

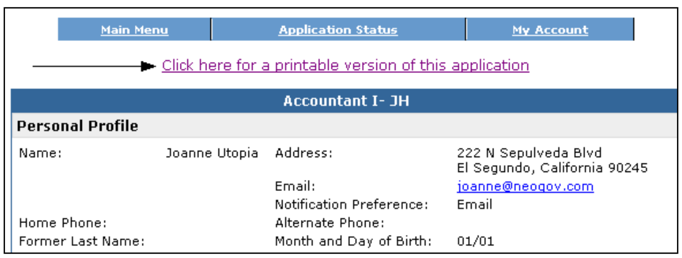


You are done applying for this position online.

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



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

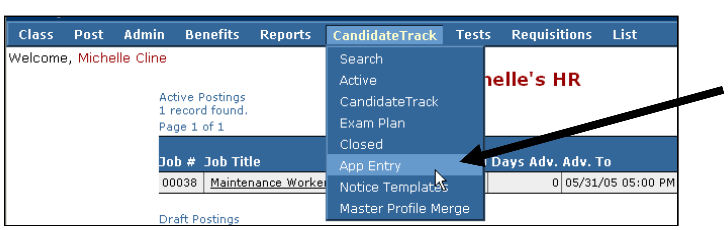


54. Click on the ‘Logout’ link in the upper-right-hand corner

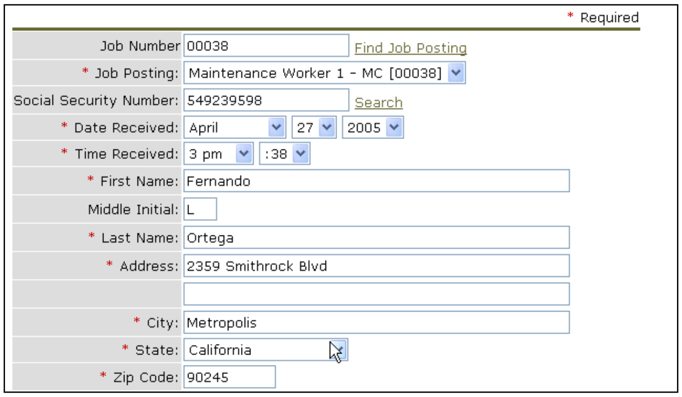
<u>Input a paper application (As Human Resources)</u>

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

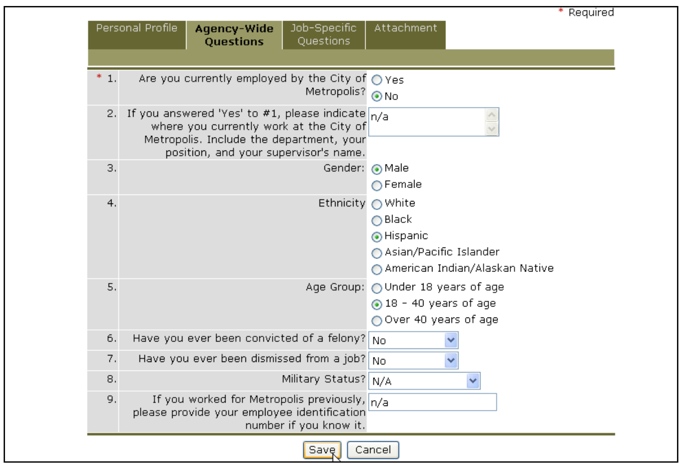
59. Select ‘App Entry’ from the ‘**CandidateTrack’** dropdown



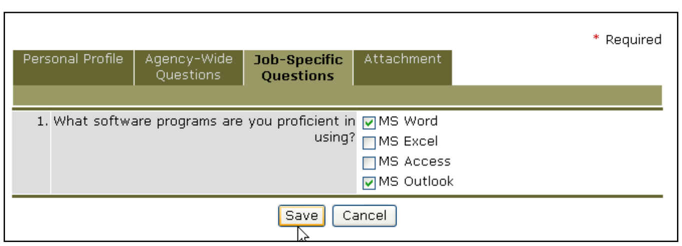
60. Fill out the required information on the screen and click ‘Save’



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



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

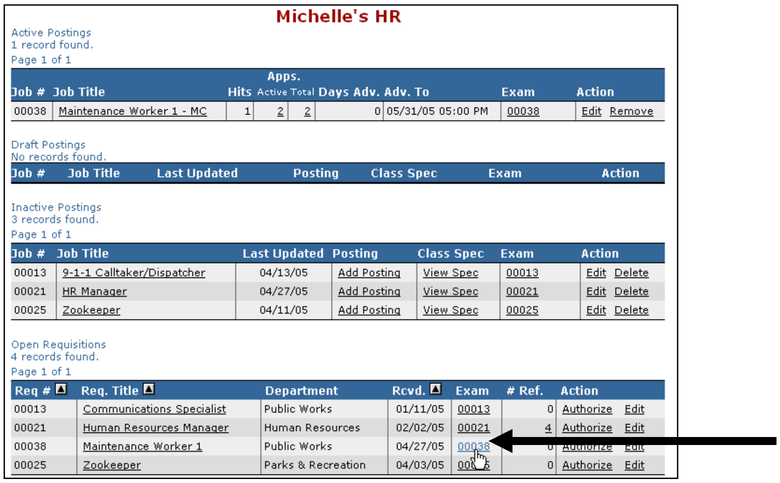


63. We do not have a .PDF version of an application, so click ‘Save & Exit App Entry’

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

Job #	Job Title	Hits	Apps. Active	Apps. 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

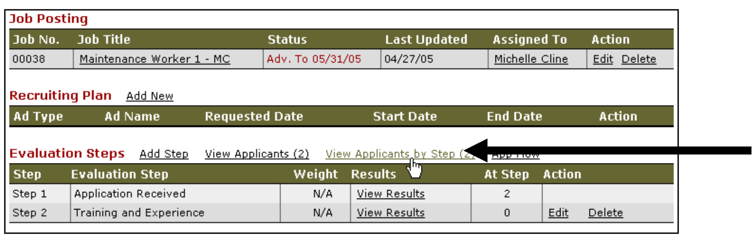
Inactive Postings
3 records found.
Page 1 of 1

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

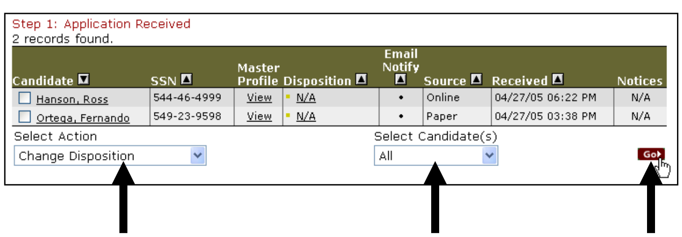
Recruiting Plan Add New

Ad Type	Ad Name	Requested Date	Start Date	End Date	Action

Evaluation Steps Add Step View Applicants (2) View Applicants by Step (2) App Flow

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



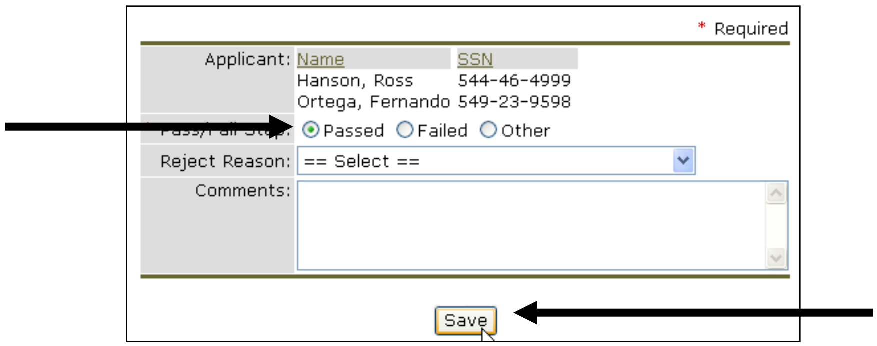
Step 1: Application Received
2 records found.

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

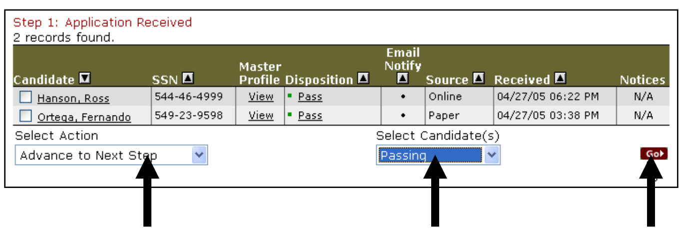
Select Action: Change Disposition
Select Candidate(s): All
Go

70. Select the 'Passed' radio option

71. Click on the ‘Save’ button

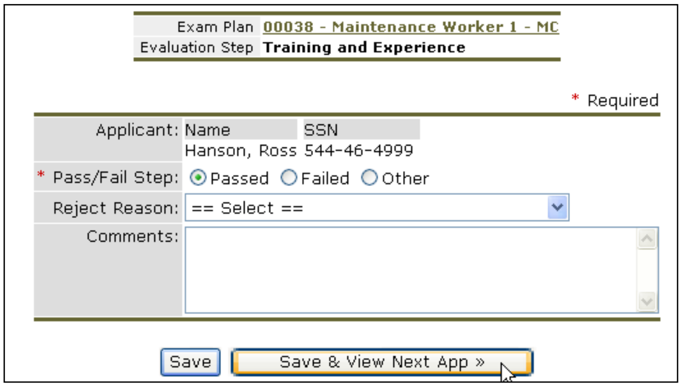


72. Select ‘Advance to Next Step’ from the ‘Select Action’ dropdown
73. Select ‘Passing’ from the ‘Select Candidate(s)’ dropdown
74. Click on the ‘Go’ icon to the right

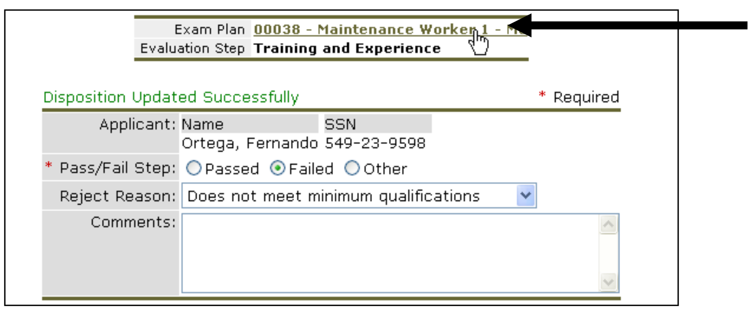


75. Under **Step** 2, click on the candidate name link for the first applicant in the list (their application should show up)
76. Click on the ‘Show Candidate Disposition’ link in the upper-right-hand corner

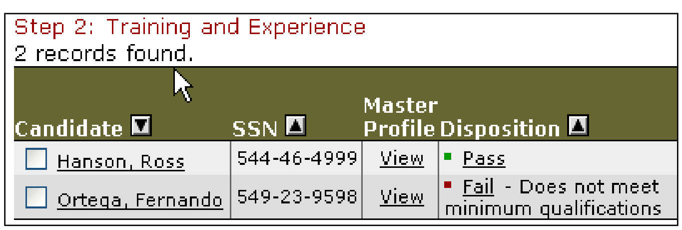
77. Mark the disposition as follows (they may not be in this order):
    - Pass the online applicant (mark disposition as passed and save)
    - Fail the paper applicant (mark the applicant as failed, select a disposition, and then click save)



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



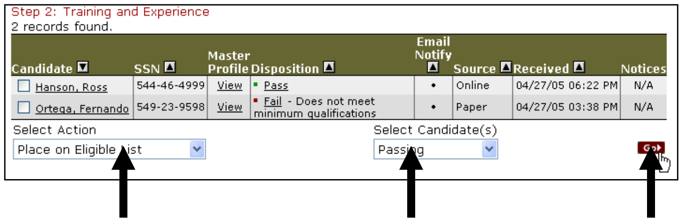
79. Click on the ‘View Applicants By Step’ link (notice that there is one passing and one failing applicant)



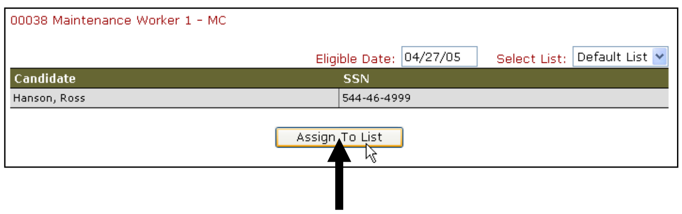
<u>Place Applicants on the Eligible List (As Human Resources)</u>

80. Select ‘Place on Eligible List’ from the ‘Select Action’ dropdown
81. Select ‘Passing’ from the ‘Select Candidate(s)’ dropdown

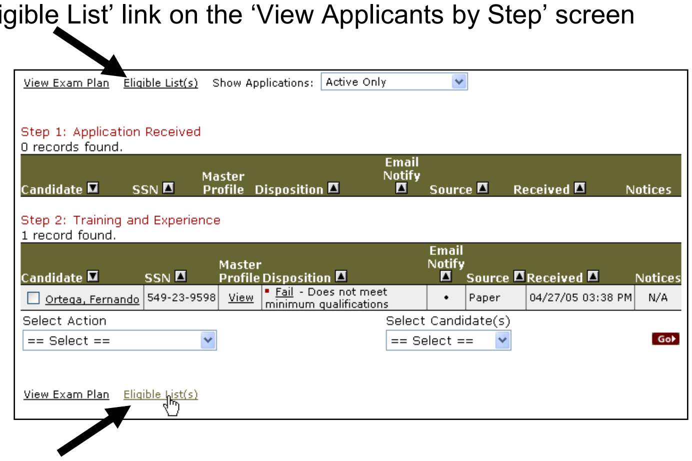
82. Click on the ‘Go’ icon to the right



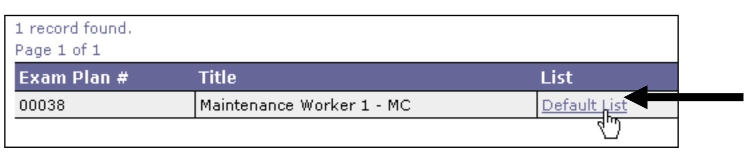
83. Click on the ‘Assign to List’ button

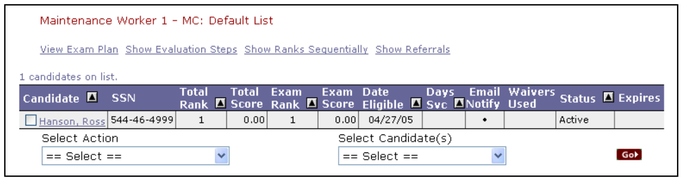


84. Click on the ‘Eligible List’ link on the ‘View Applicants by Step’ screen



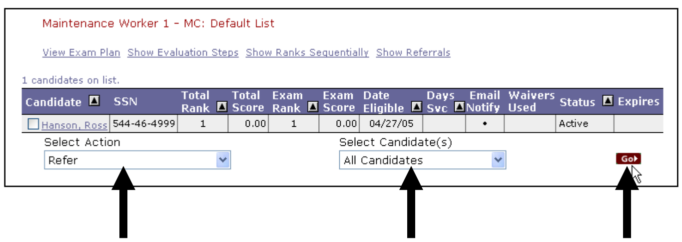
85. Click on the ‘Default List’ link on the ‘Eligible List’ screen (you will now view one name on the eligible list)



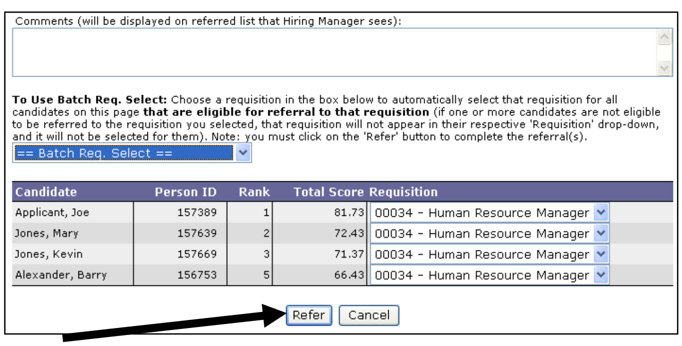


Refer Applicants to the Hiring Managers (As Human Resources)

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

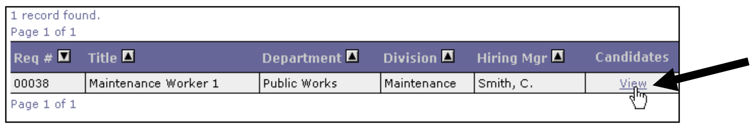


Click on the ‘Refer’ button (this action will refer the chosen applicants electronically to the Hiring Managers)

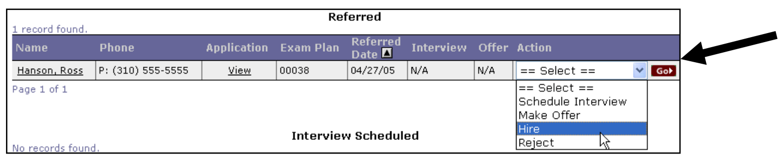


View Referred Candidates/Mark as Hired (As a Hiring Manager/Supervisor)

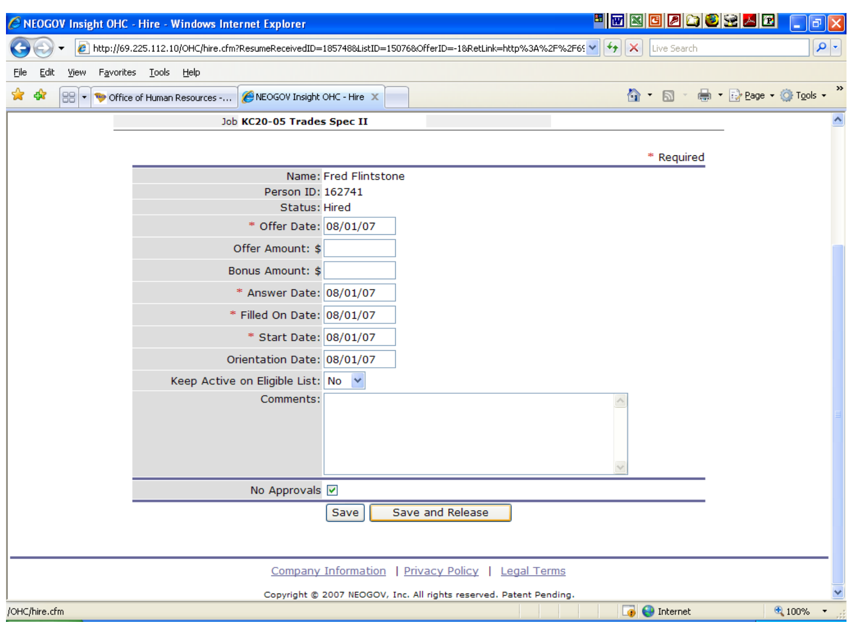
90. Click ‘NEOGOV In’ in upper left hand corner and click ‘OHC’
91. Click your name in upper right hand corner and select ‘My List’ (this will display all referred lists for this Hiring Manager)
92. Click on the ‘View’ link in the ‘Candidates’ column for the applicable requisition



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



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’.)



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

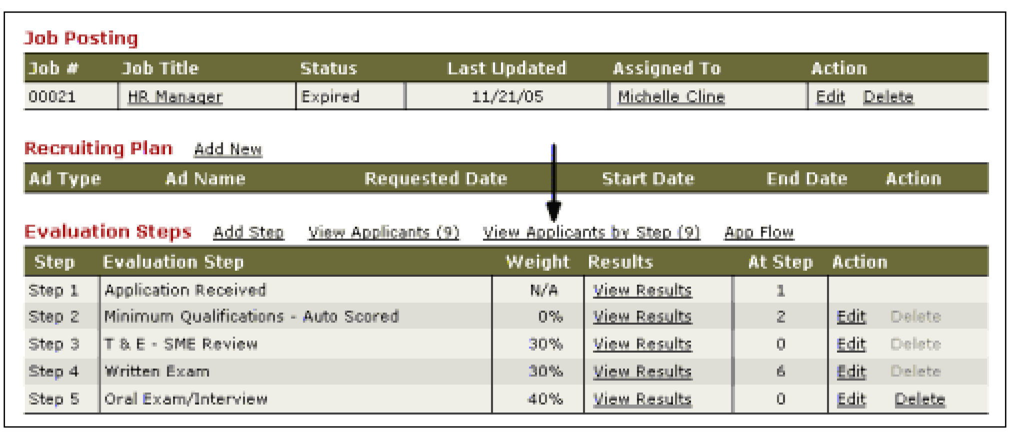
Advanced Filters

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

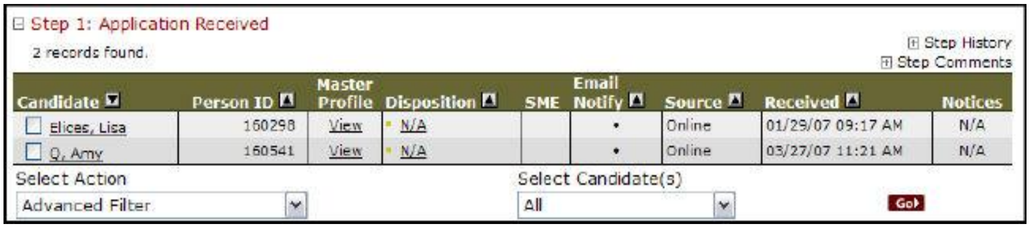
4. Click on the Exam Plan Title for the applicable exam plan
5. The ‘Exam Plan Detail’ screen is displayed
6. Click on the Evaluation Steps ‘View Applicants by Step’ link



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
Elices, Lisa	160298	View	N/A		•	Online	01/29/07 09:17 AM	N/A
Q, Amy	160541	View	N/A		•	Online	03/27/07 11:21 AM	N/A

Select Action: Advanced Filter

Select Candidate(s): All

Go

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

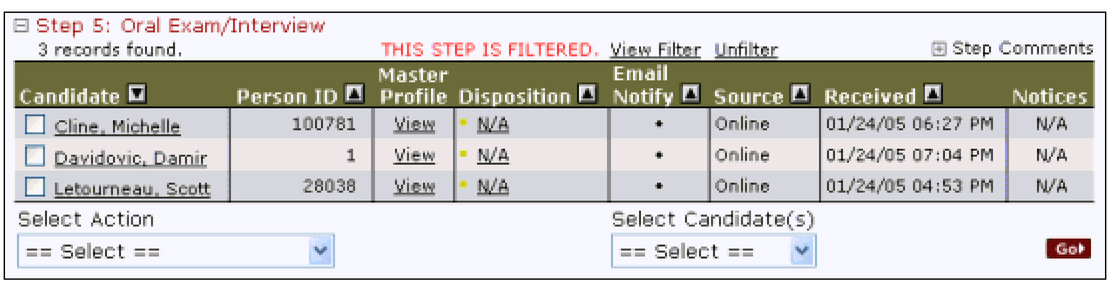
15. Select your Preferred response to the question under the Value dropdown

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	Email Notify	Source	Received	Notices
Cline, Michelle	100781	View	N/A	•	Online	01/24/05 06:27 PM	N/A
Davidovic, Damir	1	View	N/A	•	Online	01/24/05 07:04 PM	N/A
Letourneau, Scott	28038	View	N/A	•	Online	01/24/05 04:53 PM	N/A

Select Action: == Select ==

Select Candidate(s): == Select ==

Go

Notice Templates

Add a Notification Template

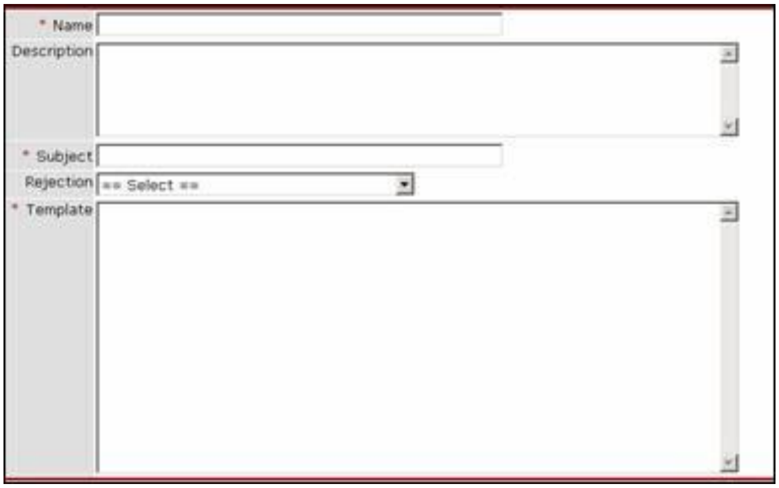
1. Access ‘MyHR’
2. From the ‘Candidate Track’ pull-down menu, select ‘Notice Templates’

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



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.

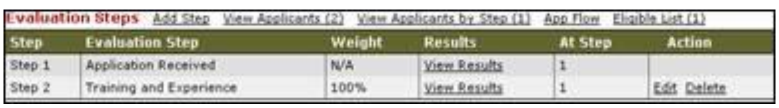
Contact Fields			
Field Name	Merge Name	Field Name	Merge Name
Contact ID	<Contact_ID>	Contact First Name	<Contact_FirstName>
Contact Last Name	<Contact_LastName>	Contact Full Name	<Contact_FullName>
Salutation	<Contact_Salutation>	Contact Title	<Contact_Title>
Contact Birthdate	<Contact_Birthdate>	Contact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

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:



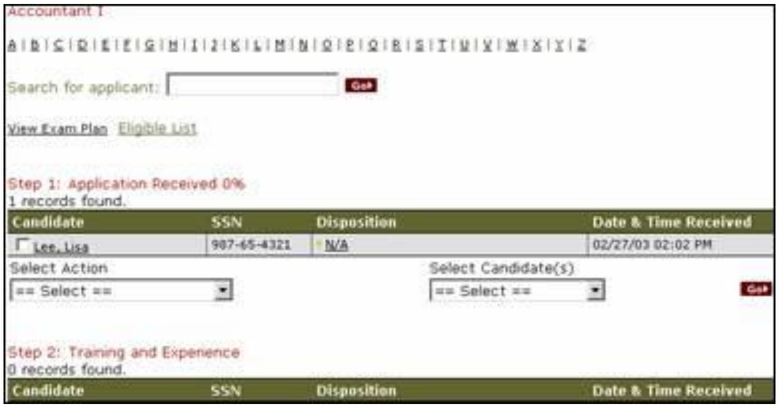
- **Add Step** – Add an Exam Plan Evaluation Step

** 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 ‘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)

10. Click the ‘Go’ icon

11. 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: == Select ==

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)

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

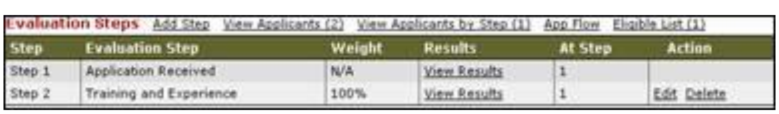
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Search for exam title or exam number: Go

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



Evaluation Steps　Add Step　View Applicants (2)　View Applicants by Step (1)　App Flow　Eligible List (1)

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

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

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

Agency-wide Questions (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.
Applicant Master Record	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.
Approver	A department (Agency) user who can approve or deny requisitions that have been routed to him/her for approval.
Benefit Code	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.
Class Spec	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.
Department Users(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.
Departments (Agencies)	The major organizational breakdowns within an organization.
Divisions (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
EEO Category	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.
Eligible List	List of applicants who have passed all evaluation steps and are eligible to be referred (certified) to hiring managers for hire.
Exam Plan (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.
Hiring Manager	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.
HR Users	Users (Recruiters/HR Analysts) who are authorized to login to Insight to access postings, applications and other exam plan-related items.
Insight	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.
Interest Card	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.
Locations	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.
Notices	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.
Online Hiring Center (OHC) – Agency Hiring Manager/Supervisor	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.
Originator	Hiring manager/supervisor (OHC user) who can create requisitions and cannot view any other user's requisitions.
Referred List	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.
Requisition	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.