

E-Recruitment

Training Guide

2000 – 2007 NEOGOV, Inc.

Last Revised: 7/23/09

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

A black arrow points to the 'Create New' link in the 'Requisition' column of the table.

- 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:				

- Check the 'No Approvals' box at the bottom of the screen
- 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;
- Click on the 'Logout' link in the upper-right-hand corner

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)

12. Enter your Human Resources Username and Password (write it to the right for future reference):
13. Select the **'Insight – Human Resources'** radio button, click login



14. 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.)

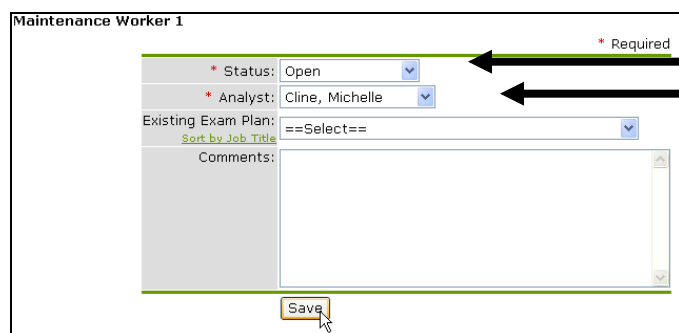


15. Click the 'Authorize' link next to the requisition you are working on



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

16. Click the 'Save' button



17. Click on the 'My HR' link in the upper-right-hand corner of your Insight screen

18. The requisition will display in the 'Open Requisitions' section all the way down to the bottom of the page (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')

19. Click on the 'Create Exam' link next to your requisition

Michelle's HR

Active Postings
No records found.

Apps.								
Job #	Job Title	Hits	Active	Total	Days Adv.	Adv. To	Exam	Action

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	Create Exam	0	Authorize Edit
00025	Zookeeper	Parks & Recreation	04/03/05	00025	0	Authorize Edit

20. 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)

21. 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
---------	---------	----------------	------------	----------	--------

22. Fill out the job posting form

- Do not change the 'Advertise From' date
- Change the 'Advertise to' date to some date in the future

- Use the Exam Plan number for the Job Number
- Select at least one category (highlight the category by clicking on it and then click the 'Add >' button just to the right to associate that category to the posting)
- Populate the class spec description fields
- Application Template (Default always)
- Search Location
- Location on Job Posting Display
- Reapply period
- 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 load 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, clearing 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: 15.09

* 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

23. 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

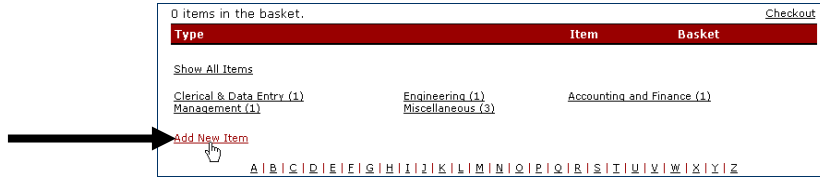
* Is the candidate required to answer the question? Yes No

Confidential Question Yes No

Save

Note: Supplemental Question Screen (1 time question only)

24. Click on the 'Add New Item' link



25. 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? (with a dropdown arrow)
- * Category: Miscellaneous (with a dropdown arrow)
- * Type: Overall computer and clerical experience (with a dropdown arrow)
- * Response Format: Radio buttons for Text Answer, Select From Choices Answer (selected), and Yes/No Answer
- * Input Type: CheckBox (with a dropdown arrow)
- * 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 bullet points:
 - Response Option - Actual response option as it appears to a job seeker. -- Ex. Los Angeles
 - Points (optional) - A number of points for this question. -- Ex. 0.5

 Below the instructions is a table for entering response options:

Response Option	Points	Sort	
MS Word			↑ ↓ DELETE
MS Excel			↑ ↓ DELETE
MS Access			↑ ↓ DELETE
MS Outlook			↑ ↓ DELETE

 Below the table is an "Add Option" button. At the bottom of the form, there is a "Required Question" dropdown set to "No" and a "Confidential" checkbox with the text "Check here if this question is confidential." and a "Save" button.

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

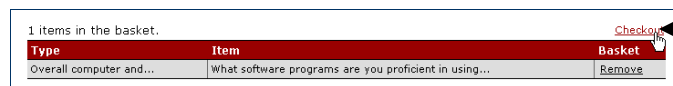
27. Click on the 'Add' link in the 'basket' column for the questions you wish to associate to your job posting

A screenshot of a list of supplemental questions. At the top, it says "8 records found." and "Page 1 of 1". Below this is a table with columns "Type", "Item", "Basket", and "Action". The "Basket" column contains "Add" links for each row. A black arrow points to the "Add" link in the row 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

Page 1 of 1

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



29. Click on the 'My HR' link in the upper-right-hand corner to verify that the posting was created successfully (it will appear in the topmost section on the My HR screen ('Active Postings'))

Michelle's HR									
Active Postings 1 record found. Page 1 of 1									
Job #	Job Title	Hits	Active	Total	Days	Adv.	Adv. To	Exam	Action
00038	Maintenance Worker 1 - MC	0	0	0	0	05/31/05	05:00 PM	00038	Edit Remove

- Note: If you do not see it in that top section, you either clicked on 'Draft' or set the advertising dates in the future. Find the posting on the screen and click the 'Edit' link. Make the necessary changes and save the posting. Repeat this process until it appears in the 'Active postings' section on the My HR page.

30. Click on "Exam Number" under the Active Posting

Michelle's HR									
Active Postings 1 record found. Page 1 of 1									
Job #	Job Title	Hits	Active	Total	Days	Adv.	Adv. To	Exam	Action
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)

31. 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 Steps 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		

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

33. Step Name type in "Training and Experience"

34. Display Candidate Status As (candidate will see this information when they gone online to check the status of their application)

35. Select the 'Pass/Fail' radio button

36. 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)

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

38. Click on the job posting title

Click on the job posting title ←

2 records found.

Page 1 of 1 ←

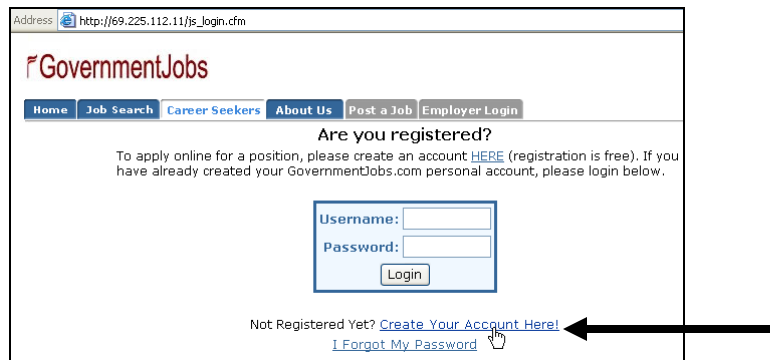
Position	Emp. Type	Salary	Filing Date
ADMINISTRATIVE MANAGER I	FTE - Full-Time	\$44,382.00 - \$82,109.00 annually	06/21/07
Directs or manages administrative and/or business management activities of a state agency or major c...			
COMMUNICATIONS SPECIALIST	FTE - Full-Time	\$20,248.00 - \$37,466.00 annually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

39. 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'

40. 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
<small>Tip: You do NOT need to recreate a new application every time you're applying for a position.</small>		

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

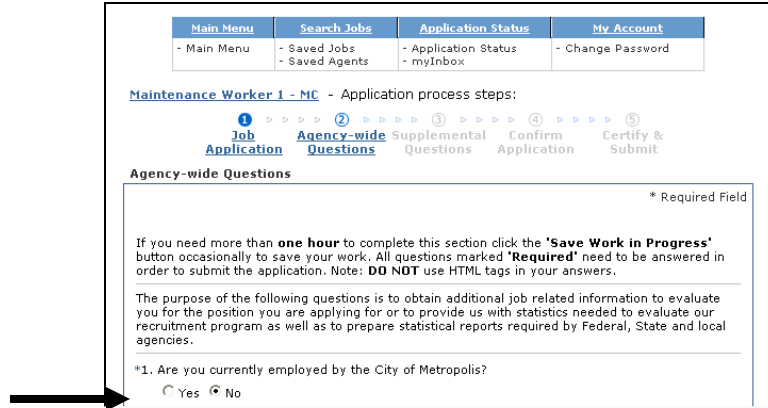
42. Click on the 'Create Application' button

43. Fill in the 'Personal Profile' information

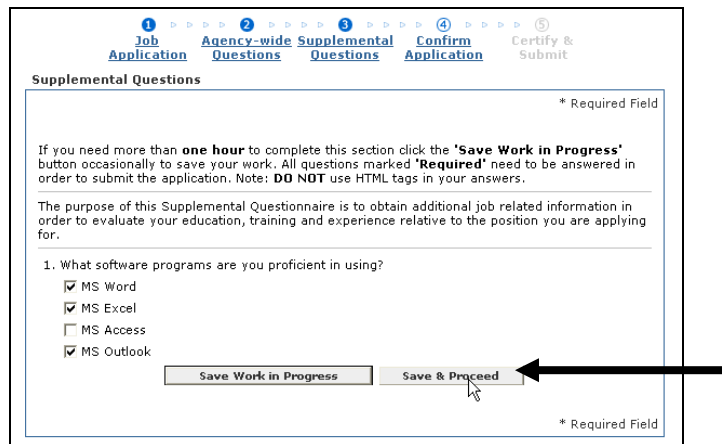
44. Click on the 'Save & View Application' button

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

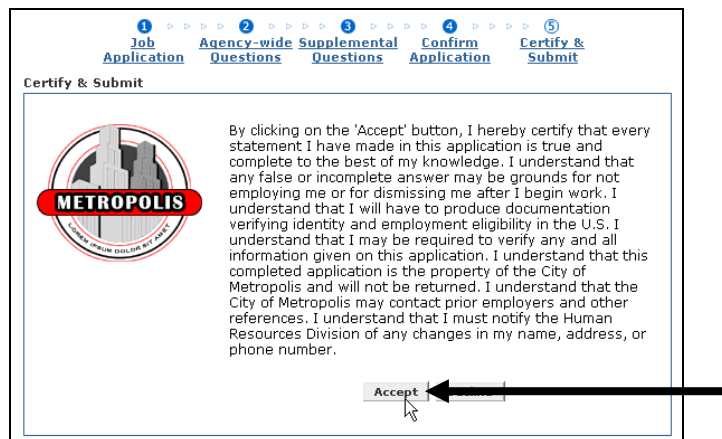
46. Answer the agency-wide supplemental questions



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



- 49. Click on the 'Save & Proceed' button at the bottom of the page
- 50. Scroll to the bottom of the application review screen and click 'Confirm & Send Application'
- 51. 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.

The screenshot shows a navigation bar with 'Main Menu', 'Application Status', and 'My Account'. Below the navigation bar, it says 'Positions You've Applied For' and 'You have applied for 16 positions.' Below this is a table with the following data:

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	

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

The screenshot shows a navigation bar with 'Main Menu', 'Application Status', and 'My Account'. Below the navigation bar, there is a link: 'Click here for a printable version of this application'. Below the link is a section titled 'Accountant I- JH' with a 'Personal Profile' section containing the following information:

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

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

Input a paper application (As Human Resources)

54. Go to: **training.neogov.com**

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

56. Enter your Human Resources Username and Password

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

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

The screenshot shows a navigation bar with 'Class', 'Post', 'Admin', 'Benefits', 'Reports', 'CandidateTrack', 'Tests', 'Requisitions', and 'List'. Below the navigation bar, it says 'Welcome, Michelle Cline'. Below this is a table with the following data:

Job #	Job Title	Days Adv.	Adv. To
00038	Maintenance Worker	0	05/31/05 05:00 PM

The 'CandidateTrack' dropdown menu is open, showing options: Search, Active, CandidateTrack, Exam Plan, Closed, App Entry, Notice Templates, and Master Profile Merge. An arrow points to the 'App Entry' option.

59. 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 2005

* 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

60. 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? Yes 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: Male Female

4. Ethnicity: White Black Hispanic Asian/Pacific Islander American Indian/Alaskan Native

5. Age Group: Under 18 years of age 18 - 40 years of age 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

[Save](#) [Cancel](#)

61. 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? MS Word MS Excel MS Access MS Outlook

[Save](#) [Cancel](#)

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

63. Click on the 'My HR' link

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

64. From the My HR screen, in the 'Open Requisitions' section (at the bottom of the screen), 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	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
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

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

65. 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)

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

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

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

68. 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		Online	04/27/05 06:22 PM	N/A
<input type="checkbox"/> Ortega, Fernando	549-23-9598	View	N/A		Paper	04/27/05 03:38 PM	N/A

Select Action:

Select Candidate(s):

Go

69. Select the 'Passed' radio option

70. Click on the 'Save' button

The screenshot shows a form for an applicant. At the top right, it says '* Required'. The form contains the following fields:

- Applicant:** A table with columns 'Name' and 'SSN'. It lists two applicants: 'Hanson, Ross' with SSN '544-46-4999' and 'Ortega, Fernando' with SSN '549-23-9598'.
- Pass/Fail/Other:** Radio buttons for 'Passed' (selected), 'Failed', and 'Other'.
- Reject Reason:** A dropdown menu with the text '== Select =='.
- Comments:** A text area for entering comments.
- Save:** A button at the bottom right, highlighted by a black arrow pointing to it from the right.

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

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

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

The screenshot shows a table of candidates with the following columns: Candidate, SSN, Master Profile, Disposition, Email Notify, Source, Received, and Notices. Two candidates are listed: 'Hanson, Ross' and 'Ortega, Fernando', both with a 'Pass' disposition. Below the table, there are two dropdown menus: 'Select Action' (set to 'Advance to Next Step') and 'Select Candidate(s)' (set to 'Passing'). A red 'Go' button is located to the right of the second dropdown. Three black arrows point to these three elements: the 'Advance to Next Step' dropdown, the 'Passing' dropdown, and the 'Go' button.

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

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

The screenshot shows an applicant profile page for '00038 - Maintenance Worker 1 - MC'. At the top, there are navigation links: 'View All Applicants', 'View Applicants By Step', and 'Show Candidate Disposition' (highlighted by a black arrow). Below these are 'Previous Applicant' and 'Next Applicant' links. The main content is a 'Personal Profile' section with the following information:

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:	

76. 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

* Pass/Fail Step: Passed Failed Other

Reject Reason: == Select ==

Comments:

77. 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

* Pass/Fail Step: Passed Failed Other

Reject Reason: Does not meet minimum qualifications

Comments:

78. 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.

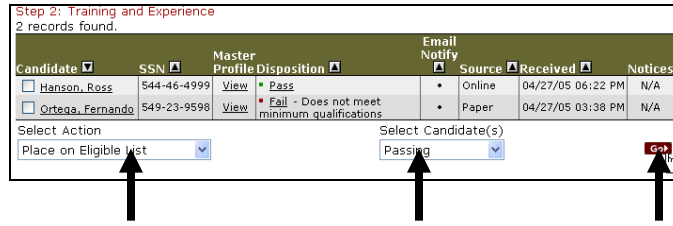
Candidate	SSN	Master Profile Disposition
<input type="checkbox"/> Hanson, Ross	544-46-4999	<input checked="" type="checkbox"/> Pass
<input type="checkbox"/> Ortega, Fernando	549-23-9598	<input checked="" type="checkbox"/> Fail - Does not meet minimum qualifications

Place Applicants on the Eligible List (As Human Resources)

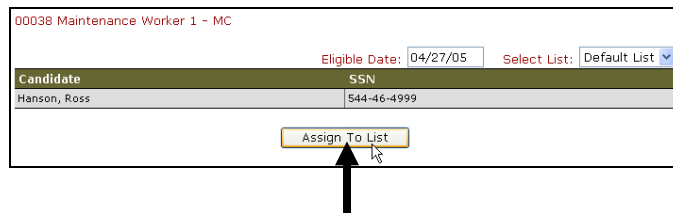
79. Select 'Place on Eligible List' from the 'Select Action' dropdown

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

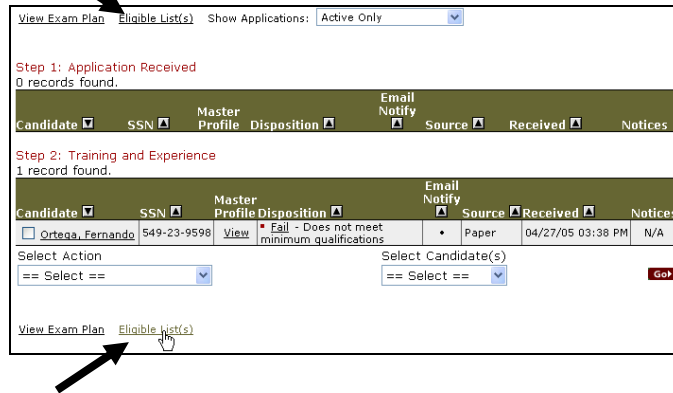
81. Click on the 'Go' icon to the right



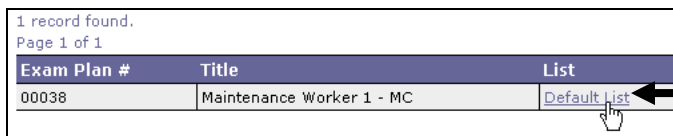
82. Click on the 'Assign to List' button

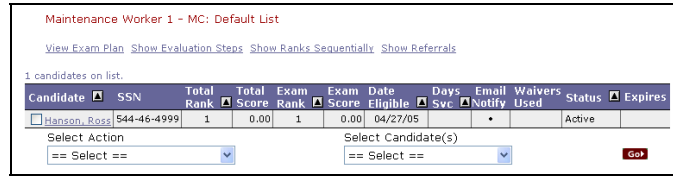


83. Click on the 'Eligible List' link on the 'View Applicants by Step' screen



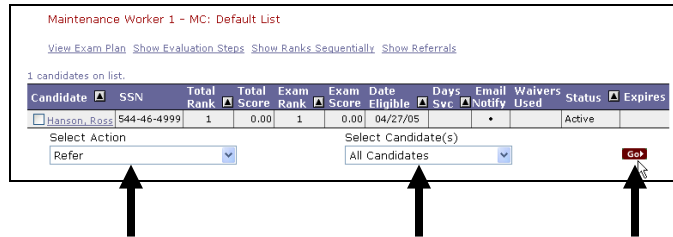
84. Click on the 'Default List' link on the 'Eligible List' screen (you will now view one name on the eligible list)



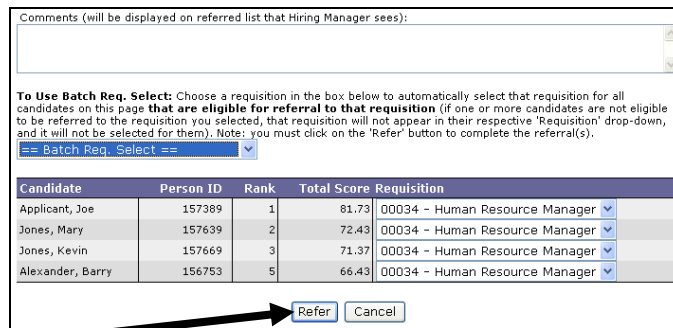


Refer Applicants to the Hiring Managers (As Human Resources)

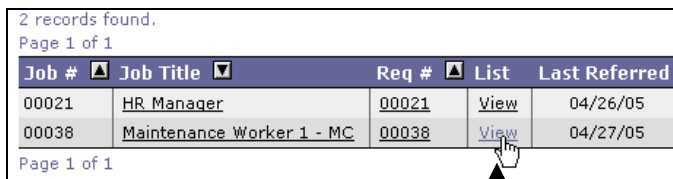
- 85. Select 'Refer' from the 'Select Action' dropdown
- 86. Select 'All Candidates' from the 'Select Candidate(s)' dropdown
- 87. Select 'Requisition' from the 'Select Requisition' dropdown
- 88. Click on the 'Go' icon



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



- 89. Click on the 'View' link in the 'List' column for your requisition

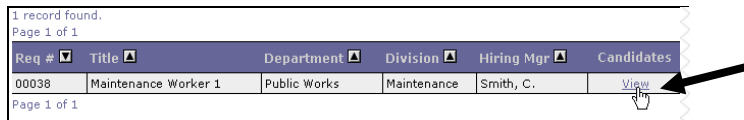


View Referred Candidates/Mark as Hired (As a Hiring Manager/Supervisor)

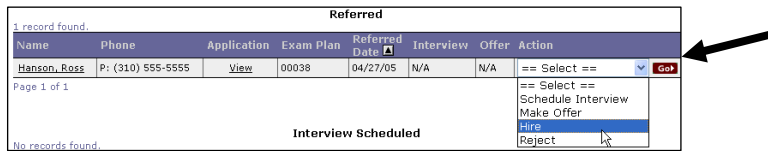
90. Go to: **training.neogov.com**
91. Click on the 'Login' link in the upper-right-hand corner
92. Enter your Online Hire Center Username and Password (Use the username and password from STEP 11 above)
93. Select '**Online Hiring Center - Departments**' radio button, click login
94. Click on the 'My List' link in the upper-right-hand corner (this will display all referred lists for this Hiring Manager)



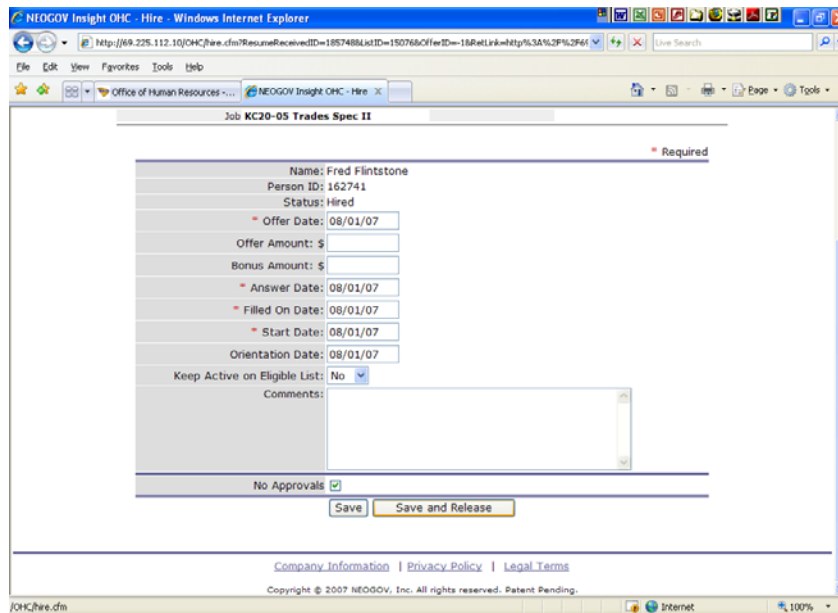
95. Click on the 'View' link in the 'Candidates' column for the applicable requisition



96. Select 'Hire' from the 'Action' dropdown
97. Click on the 'Go' icon



98. Click on 'Save and Release' button at the bottom of the screen (the applicant is marked as hired and is now displayed in the 'Hired' section and HR now has a 'Hire Awaiting Authorization'.)



99. Click on the Log Out link in the upper right hand corner

Authorize a Hire and Send Notices (As Human Resources)

100. Go to **training.neogov.com**
101. Click on the Log-in link in the upper right hand corner
102. Enter your Human Resources Username and Password
103. Select the '**Insight – Human Resources**' radio button, click login
104. Scroll to bottom of the 'My HR' screen to view 'Hires Awaiting Authorization'
105. Click on the Candidates name under 'Hires Awaiting Authorization' (which will show the offer)
106. Click on 'Edit' in the middle of the page on the Personnel Action Form. (**NOTE:** HR can make changes to this form.)
107. Click on Save and Authorize
108. Select 'Referred' from the "List" dropdown
109. Find the Referred List for your Job Title and click on "View"
110. Select Candidate to generate a notice for by marking the box next to the Candidates Name.
111. Select E-mail Notification or Written Notification from the Select Action dropdown (applicants reference)
112. Select "Selected Candidates" from the Select Candidates dropdown
113. Click on the Go icon
114. Click on Generate Notices (Email Notification click on Send and Written Notifications to print out rejection notice)
115. Repeat steps 110 – 114 to send a different notice to an applicant (Example – one candidate might be sent a rejection notice while another candidate is sent a hire notice.)

Fill Requisitions (As Human Resources)

116. Go back to the 'My HR' screen
117. Under the 'Open Requisitions' section of the 'My HR' page, click "Authorize" next to the requisition that needs to be filled
118. Change the requisition status to "Filled" from "Open"
119. 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

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. Click on the Evaluation Steps 'View Applicants by Step' link

Job #	Job Title	Status	Last Updated	Assigned To	Action
00021	HR Manager	Expired	11/21/05	Michelle Cline	Edit Delete

Ad Type	Ad Name	Requested Date	Start Date	End Date	Action

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'



Add New Email Template

Search for class title or class code:

1 record found.
Page 1 of 1

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'. 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-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

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:

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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