



NEOGOV INSIGHT

The New OHC

Table of Contents

Introduction	4
OHC Roles.....	4
OHC Dashboard.....	5
Previously Used Menus.....	5
Profile Menu	5
Approvals Menu.....	5
Replacement to the Menus	6
My Tasks.....	6
My Candidates	7
My Requisitions.....	7
Create an Approval Workflow	8
Steps to Create an Approval Workflow	8
Create a Requisition.....	10
Navigation Path 1.....	10
Navigation Path 2.....	10
Steps to Create a Requisition.....	11
Approve a Requisition.....	14
Requisition Approval Path Example	14
Steps to Approve a Requisition.....	14
Reassign Requisitions.....	16
Steps to Reassign Requisitions.....	16
Complete an SME Review	17
Steps to Complete an SME Review	17
Set up a Rater.....	22
Steps to Set up a Rater.....	22
Customize a Hire Workflow	23
Steps to Customize a Hire Workflow	24
Set up a Notice Template.....	29
Steps to Set up a Notice Template.....	29
Schedule Interviews	31
Steps to Schedule Interviews	31
Send Notices	34
Steps to Send Notices	34
Steps to Send an Individual Notice	36

NEOGOV

Rate an Interview	38
Steps to Rate an Interview	38
Reject a Candidate	41
Steps to Reject a Candidate	41
Steps to Reject Candidates in Bulk.....	44
Make an Offer	46
Steps to Make an Offer	46
Steps to Update Offer Status	47
Hire a Candidate	49
Steps to Hire a Candidate	49
Approve a Hire	53
Steps to Approve a Hire	53
Print Applications.....	55
Steps to Print Applications.....	55

The New OHC

Introduction

We're excited to offer to you a new take on a NEOGOV classic: the Online Hiring Center (OHC). The OHC engages hiring department staff, subject matter experts and approval groups in the recruitment and selection process from requisition to hire. With the redesigned version, OHC users will benefit from an intuitive interface featuring a central dashboard of pertinent tasks and many other great features. This guide will give you an overview of concepts that have remained the same, areas that have changed and some completely new functionality. Welcome to the *new* OHC!

OHC Roles

The five OHC roles of Hiring Manager,  Approver, Originator and HR Liaison, have remained the same. There have been no changes to the tasks each role is permitted to complete. If an OHC user has pending tasks or associated requisitions, it is business as usual when you switch to the new OHC. Everything will carry over, and in fact, the OHC user will likely find it easier to see what is pending their review.

New to the OHC family is the  role. With this role, OHC users can rate candidates based on a new star rating or traditional pass/fail and scored methods.

Permitted Task	Originator	HR Liaison	Hiring Manager	Rater	SME	Approver
Create requisitions	•	•				
View all assigned departments' requisitions		•				
Manage all assigned departments' OHC user accounts (if given access)			•			
Approve/deny requisitions						•
View applications		•	•	•	•	•
Change candidates' disposition values (prior to the referred list)					•	
Send notices to candidates (if given access)	•		•			
View and rate assigned referred lists				•		
View and take action on assigned referred lists				•		
View and take action on all assigned departments' referred lists	•					
Approve/deny hires						•

OHC Dashboard

After signing into the OHC your dashboard displays. This is a centralized place of items that require your attention. In the OHC world, these are your assigned tasks, referred candidates and associated requisitions. This functionality is a departure from the previous version of the OHC.

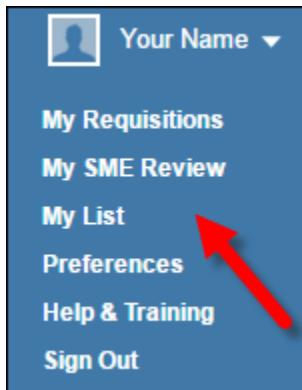
Previously Used Menus

In the previous version of the OHC, you accessed various menus to accomplish a combination of tasks including creating and approving requisitions, completing interviews and many others.

Profile Menu

The Profile menu was used to access:

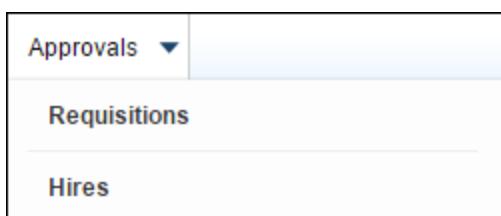
- My Requisitions – Add, edit, reassign or check the status of a requisition.
- ~~My SME Review – Complete an SME review assigned to you.~~
- My List – Complete interview and hiring tasks for a referred list of candidates sent to you.



Approvals Menu

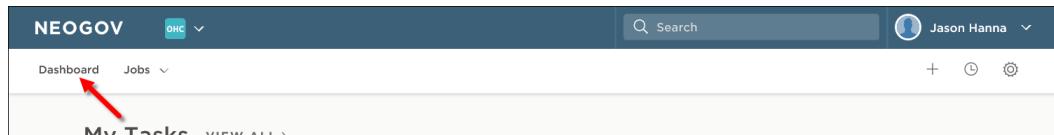
The Approvals menu was used to access:

- Requisitions – Approve/deny requisitions sent to you. 
- Hires – Approve/deny hires sent to you. 



Replacement to the Menus

The replacement to these menus is the dashboard. Whenever you need to return back to the dashboard, click Dashboard, from the upper left.



My Tasks

In the My Tasks section, you can have four different types of tasks pending your review:

1. Requisition Approval 
2. ~~SME Review~~
3. Interview Rating
4. Hire Approval 

The default view displays all tasks pending your review. Click one of the color-coded tabs to view a specific task type.

A screenshot of the 'My Tasks' list view. At the top, there is a summary bar with five tabs: 'Total' (4), 'Hire Approval' (1, highlighted with a red arrow), 'Interview Rating' (1), 'SME Review' (1), and 'Requisition Approval' (1). Below the summary bar is a table with columns: Type, Related To, Date Assigned, Department, and Division. The table contains four rows of task data. At the bottom of the table, there is a message 'Showing 1 - 4 of 4 items' and two navigation arrows. The table has a dark header row and light-colored body rows.

To view all tasks, including completed ones, click **VIEW ALL**.

A screenshot of the 'My Tasks' list view, similar to the previous one but with a red arrow pointing to the 'VIEW ALL' link located above the summary bar.

My Candidates

In the My Candidates section, referred lists will display for which you are an assigned hiring manager.

My Candidates						
Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00006	Administrative Assistant	8	Operations	Human Resources	Jason Hanna +1	04/28/2016
00010	Database Administrator	5	Development	IT Operations	Jason Hanna	09/16/2016
Showing 1 - 2 of 2 items						

My Requisitions

In the My Requisitions section, four types of requisitions associated with you will display:

- Draft – Requisitions you have created and saved, but haven't yet submitted.
- In-Progress – Requisitions you have submitted and are in progress of being approved.
- Approved – Requisitions you have submitted and have been approved by all groups.
- Open – Requisitions you have submitted and have been opened by HR for recruiting.

The default view displays all draft, in-progress and approved requisitions associated with you. Click one of the color-coded tabs to view a specific requisition type.

My Requisitions VIEW ALL >						
3 Total		1 Draft	1 In-Progress	1 Approved		
Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On
00003	Draft Accountant	Operations	Finance	Jason Hanna	Draft	04/28/2016
00007	Approved .NET Prog...	Development	Production Applications	Jason Hanna	Complete	04/28/2016
00008	In Progress Customer ...	Operations	Customer Success	Jason Hanna +1	0 of 4	04/30/2016

To view all requisitions, including filled and cancelled ones, click VIEW ALL.

My Requisitions VIEW ALL >						
3 Total		1 Draft	1 In-Progress	1 Approved		
Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On
00003	Accountant	Operations	Finance	Jason Hanna	Draft	04/28/2016

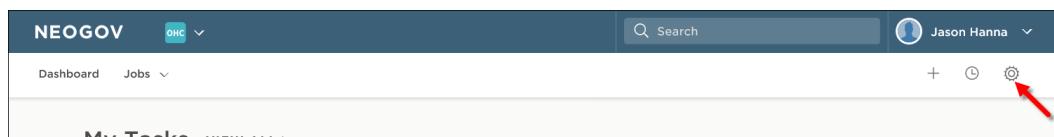
Create an Approval Workflow

Ever wish you could create templates for your various requisition and hire approval paths? It's now possible with the new OHC!

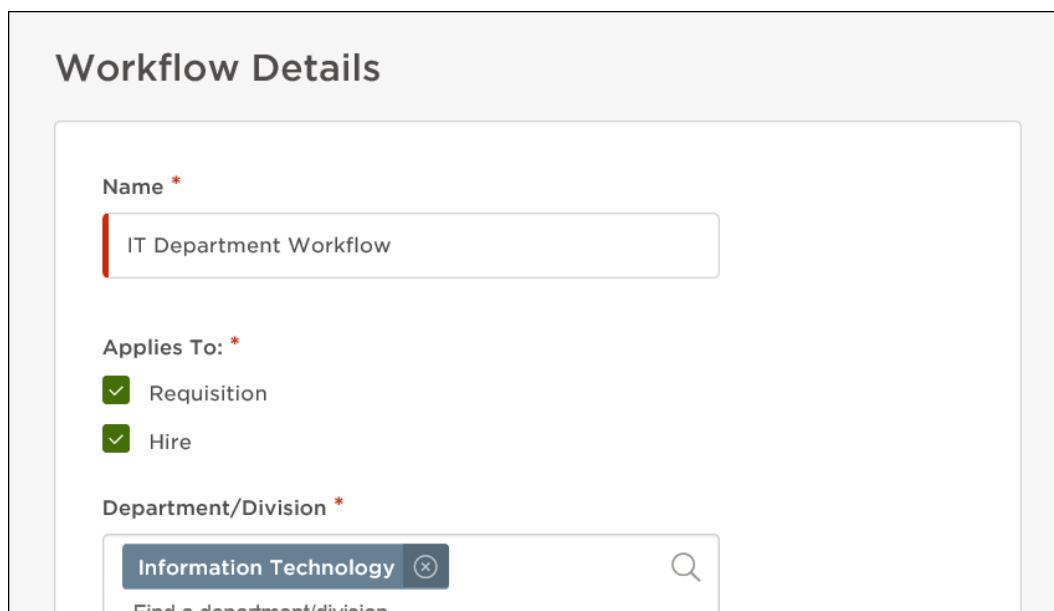
With the OHC role of HR Liaison, you can create saved approval workflows for your assigned department(s)/division(s).

Steps to Create an Approval Workflow

1. From the upper right, click the Settings button. It looks like a gear.



2. Click Approval Workflow, and then click Add.
3. From the Name field, enter a name for your approval workflow, e.g., IT Department Workflow.
4. From the Applies To field, select Requisition, Hire, or both.
5. From the Department/Division field, click  select the applicable department(s)/division(s), and then click Done.



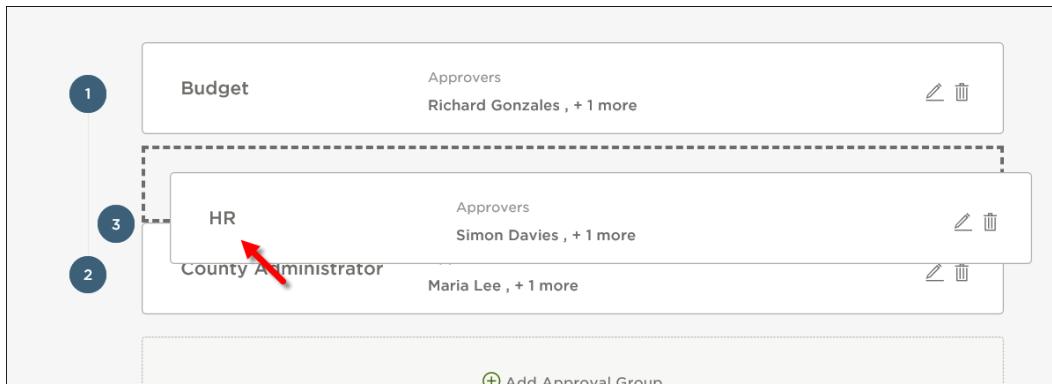
Workflow Details

Name *
IT Department Workflow

Applies To: *
 Requisition
 Hire

Department/Division *
Information Technology 
Find a department/division

6. Will your workflow have approval steps? If not, from the Approvals switch, click to the off setting, and then click Save. If your workflow will have approval hurdles, leave the Approvals switch in the on setting and continue to the next step.
7. On the Approval Group pulldown, click the applicable approval group.
8. From the Approvers field, click , select the applicable approvers, and then click Done.
9. Click Add Approval Step.
10. Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.
11. Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop operation.



12. Once you're done, click Save to add your first approval workflow!

Create a Requisition

With the OHC role of Originator or HR Liaison, you can create a requisition.

When a hiring department has an open position, they'll submit a requisition as a request to fill the vacancy.

Below are two navigation paths to start up the process of creating a requisition.

Navigation Path 1

On the Add New menu [+], click Requisition. This can be done from any page.

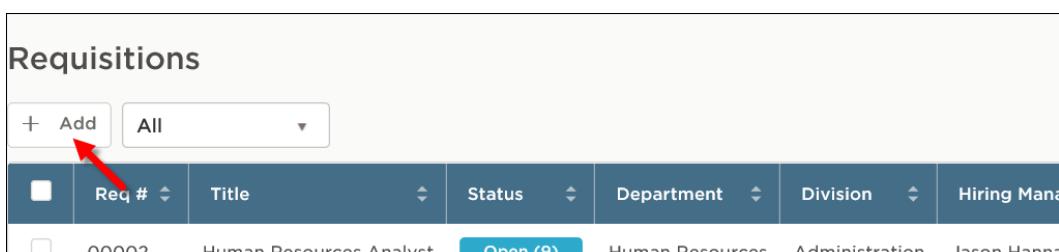


Navigation Path 2

On the Jobs menu, click Requisitions.



Then click Add.



Steps to Create a Requisition

1. The first of three requisition form pages will display.

Requisition Details

Requisition #

Department/Division *

Class Spec *

Working Title

Desired Start Date

Hiring Manager * Find a hiring manager

Job Type

List Type

Number of Vacancies

Position Details

New Position? Yes No

Position # *

Vacancy Date

Delete

2. Complete the requisition form page.
3. Have you selected the correct class spec? There's a way you can check. From the Class Spec field, click the selected job title to have a closer look. After your review, click Close.

Create Requisition

1. CREATE **2. APPROVALS**

Requisition Details

Requisition #

Class Spec *

Desired Start Date

Class Spec Details

Description
Examples of Duties
Close

4. Once you've completed the form, click Save & Continue to Next Step.

5. If you have an approval workflow  template, it will display on the second requisition form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes will only be applied to this requisition, not the saved approval workflow template.

Approval Workflow



The approval workflow below has been automatically applied to this requisition based on the Department/Division.

You have the option to override the workflow for this requisition

1

Budget

Approvers: Richard Gonzales, + 1 more

Status:  Pending...

Comments:  

2

HR

Approvers: Simon Davies, + 1 more

Status:  Pending...

Comments:  

3

County Ad...

Approvers: Maria Lee, + 1 more

Status:  Pending...

Comments:  

[+ Add Approval Group](#)

6. You will be prompted to create an approval workflow if a template for your department/division does not exist. You have two options: (1) Create an approval workflow. (2) Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.

7. On the Approval Group pulldown, click the applicable approval group.

8. From the Approvers field, click , select the applicable approvers, and then click Done.

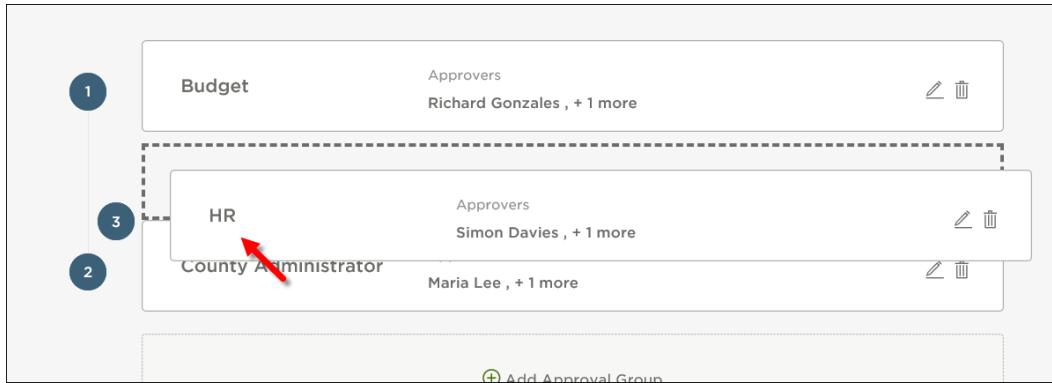
9. Click Add Approval Step.

10. Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.

Page 12 of 57 – NEOGOV Insight: The New OHC

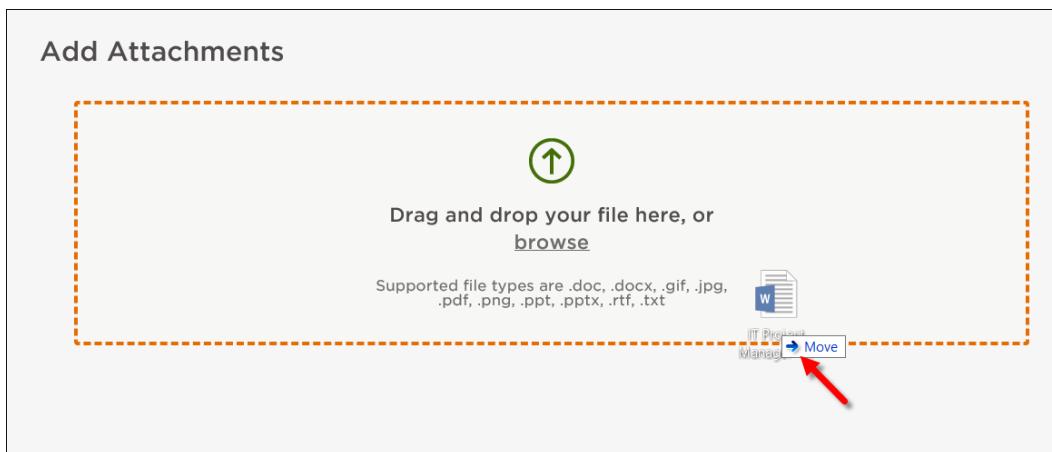
Revised 6/16/17

11. Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop operation.



12. Once you're done, click Save & Continue to Next Step.

13. Drag any file attachments to the third requisition form page and click Save & Submit.



Note: If you're not quite ready to submit the requisition, click Save & Close. The requisition will display on your dashboard page in the My Requisitions section as a draft.

Approve a Requisition

With the OHC role of Approver, you can review a requisition sent to you for approval.

Like the previous version of the OHC, the selections of approve, deny and on hold are available.

Conversely, the cancel selection is no longer available for approvers. A requisition must be cancelled by the person that created it or someone with the role of HR Liaison. Additionally, if a requisition has been approved, it can be cancelled by an HR staff member with Insight access.

Requisition Approval Path Example

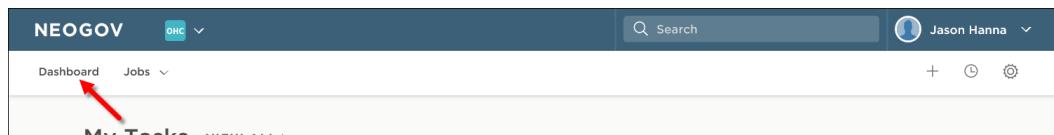
In the example below, the defined approval path requires the requisition to travel through a total of four approval groups before going to HR.

Once the requisition creator clicks Save & Submit, the requisition will go to the first approval group. In this example, both Simon Davies and Melanie Scott will be notified, via email, that a requisition requires their review. Like the previous version of the OHC, approval is on a first come, first approve basis. Either Simon or Melanie will need to approve the requisition to move it on to the next approval group.

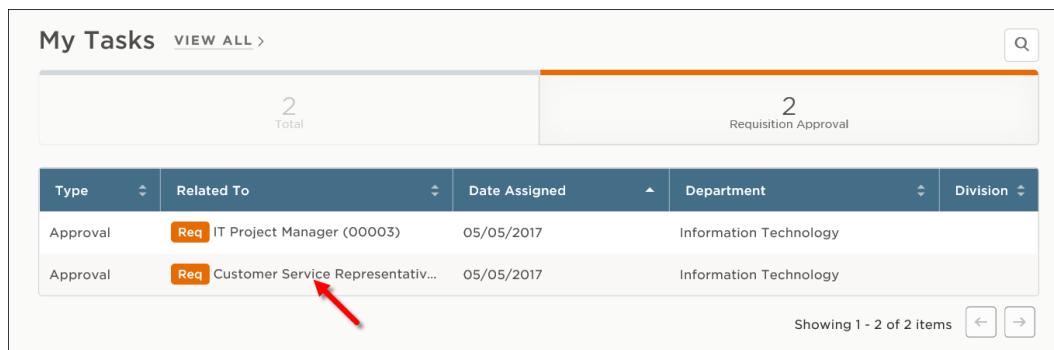
Approval Group	Selected Approver(s)
Group 1: Manager	Simon Davies and Melanie Scott
Group 2: Director	Joyce Lowe and Mark Campbell
Group 3: Budget	Nancy Reed
Group 4: President	Drake Thomas

Steps to Approve a Requisition

1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. From the My Tasks section, click the requisition pending your review.



NEOGOV

3. Click Approve, type any comments and click Submit.

Requisition Approval
Customer Service Representative (00005)

✓ Approve X Deny || Hold Submit

Comment (Optional)
I approve this requisition. Thank you!

Requisition Details

Requisition Number 00005	Department Information Technology
Title Customer Service Representative	Division N/A

APPROVAL TIMELINE

1	Pending...
	Budget Richard Gonzales, +1 more
2	Pending...
	HR Simon Davies, +1 more

4. If you're testing the approval workflow process, you may be an approver for multiple approval groups. In this case, repeat these steps until the requisition has been approved by all groups and sent to HR.

Note: Approvers have the option of denying or placing a requisition on hold. If denied, the requisition record can be sent back to any one of the previous approval groups, or all the way back to the creator. Depending on the circumstances of the denial (e.g., additional justification), the requisition approval process can be restarted.

Requisition Approval
IT Project Manager (00003)

✓ Approve X Deny || Hold Submit

Send Back to Step
Originator - Hanna Jason

Comment (Optional)
The County Administrator's Office requires a new position justification report (i.e., not a replacement of staff). Thank you in advance for providing this report.

Requisition Details

Requisition Number	Department
--------------------	------------

APPROVAL TIMELINE

✓	05/05/2017 by Cheryl Ward
	Budget Richard Gonzales, +1 more

Reassign Requisitions

With the OHC role of Originator or HR Liaison, and the Allow Originator/Liaison Reassignment permission selected (Insight navigation: Admin > Agency Preferences > OHC Security), you can reassign a requisition.

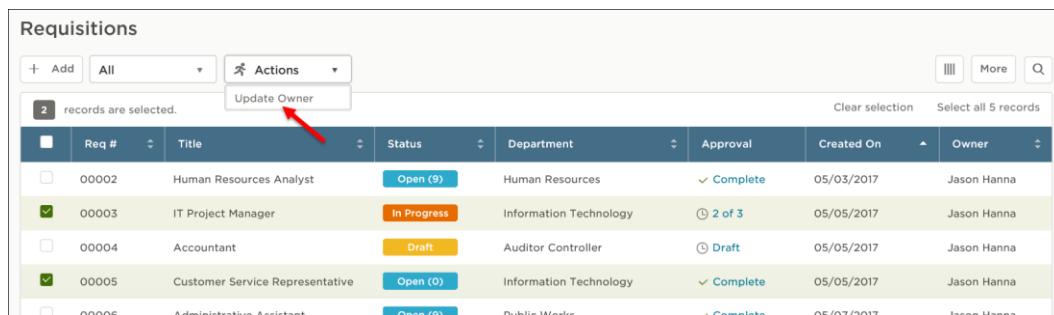
Like the previous version of the OHC, you can reassign a requisition to a different owner within your assigned department(s)/division(s). It gets better! With the new OHC you can reassign *multiple* requisitions, using a bulk action feature.

Steps to Reassign Requisitions

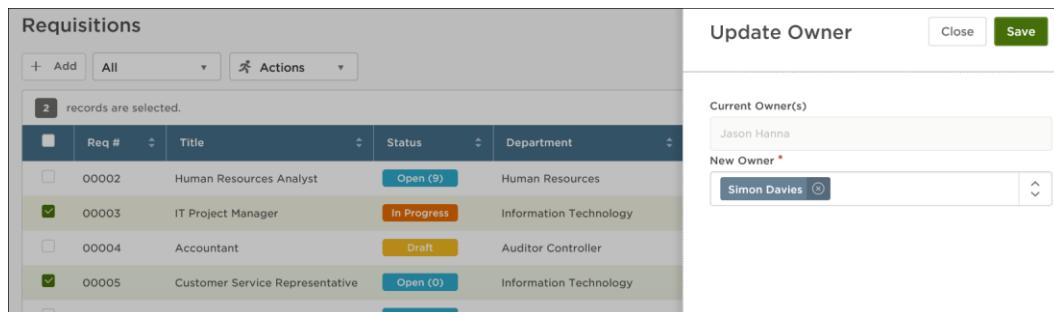
1. On the Jobs menu, click Requisitions.



2. Select the requisition(s) requiring reassignment to a different owner. On the Actions menu, click Update Owner.



3. On the New Owner pulldown, click the new owner's name.



4. Once you're done, click Save and then click Yes, Update.

Complete an SME Review

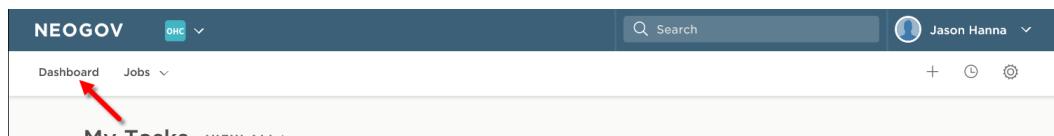
With the OHC role of SME, you can complete an SME review.

SME reviews are used when HR enlists the expertise of their organization's subject matter experts (SMEs) to assist with the candidate selection process. The application of an SME review ranges from a simple pass/fail rating with a single reviewer, to a scored assessment with a panel of multiple reviewers.

The new OHC now has an extra layer of user security in the context of scored performance and oral exam evaluation steps. To complete an SME review for either a scored performance or oral exam evaluation step, an OHC user must be given the SME role and a rater record (Insight navigation: Tests > Raters and Proctors) with an email address matching the user profile email address. This added security offers a well-defined scoring area when multiple reviewers are used.

Steps to Complete an SME Review

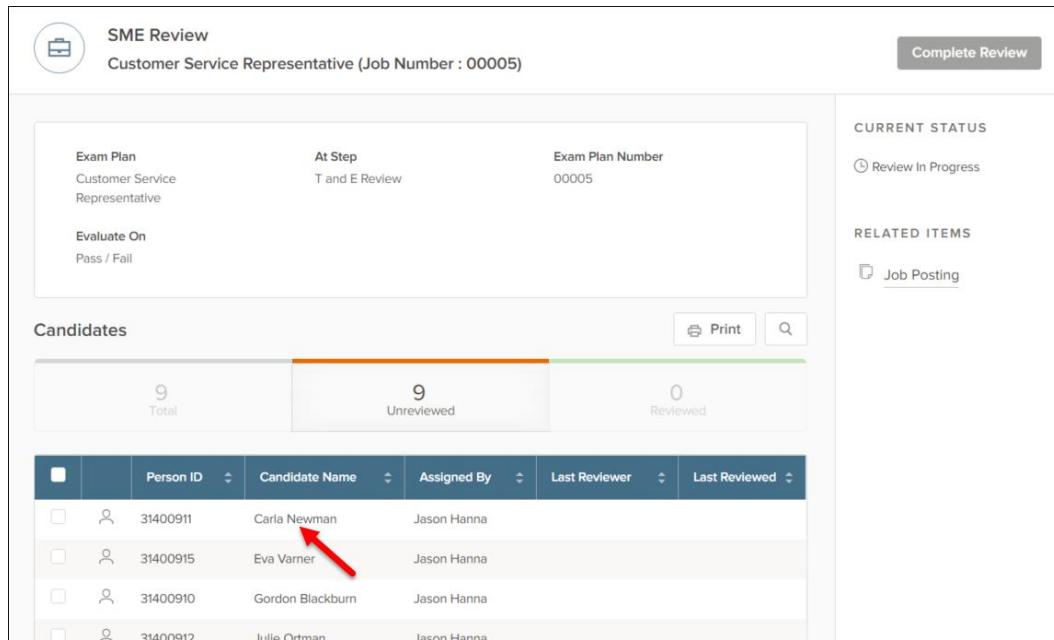
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. From the My Tasks section, click the SME review pending your review.

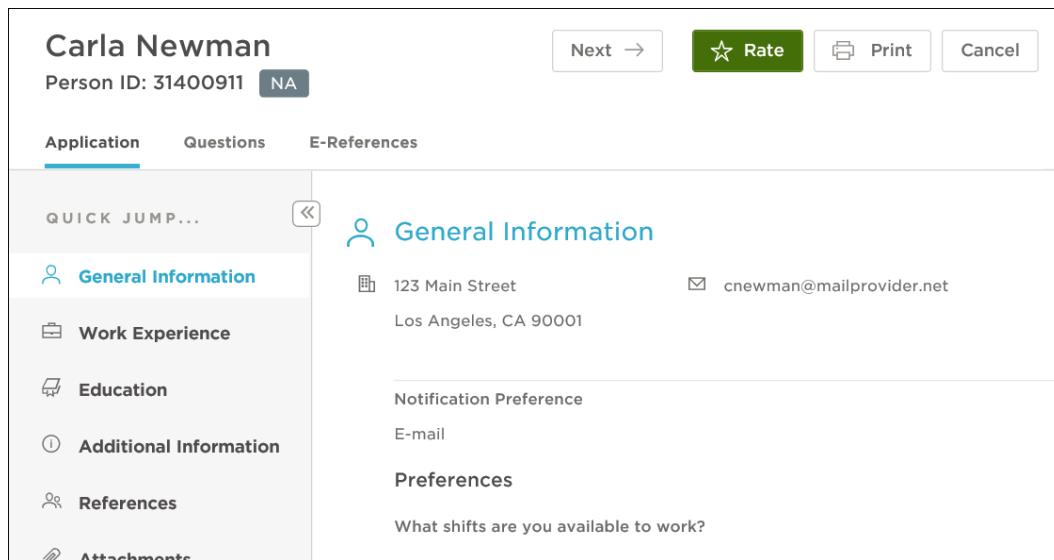


3. Click the name of the first candidate to be reviewed.



The screenshot shows the SME Review interface for a Customer Service Representative (Job Number: 00005). The top header includes the SME Review logo, the job title, and a 'Complete Review' button. On the left, there's a sidebar with 'Exam Plan' (Customer Service Representative), 'At Step' (T and E Review), and 'Exam Plan Number' (00005). Below this is an 'Evaluate On' section (Pass / Fail). The main area is titled 'Candidates' and shows a summary: 9 Total, 9 Unreviewed, and 0 Reviewed. A table lists candidates with columns for Person ID, Candidate Name, Assigned By, Last Reviewer, and Last Reviewed. The candidate 'Carla Newman' (Person ID 31400911) is highlighted with a red arrow.

4. The application will display including contact information, work experience, education and other information. Click the Questions tab to review the candidate's answers to agency wide and job-specific supplemental questions. Similarly, click the E-References tab to review feedback provided by reference contacts.



The screenshot shows the candidate profile for Carla Newman (Person ID: 31400911). The top header includes 'Carla Newman', 'Person ID: 31400911', and 'NA'. Below this are buttons for 'Next →', 'Rate', 'Print', and 'Cancel'. The navigation tabs are 'Application', 'Questions', and 'E-References', with 'Application' being the active tab. A sidebar on the left lists 'QUICK JUMP...' options: General Information (selected), Work Experience, Education, Additional Information, References, and Attachments. The main content area is titled 'General Information' and shows contact details: 123 Main Street, Los Angeles, CA 90001, and email cnewman@mailprovider.net. It also includes sections for 'Notification Preference' (E-mail), 'Preferences', and a question about availability: 'What shifts are you available to work?'.

NEOGOV

5. Once you're ready to rate the candidate, click Rate.
6. Like the previous version of the OHC, you have three ratings in a pass/fail setting: Pass, Fail and Other. Click one of these ratings, enter any comments and then click Save.

Carla Newman

Person ID : 31400911

Please rate Carla Newman

Pass Fail Other

Overall Comments

Excellent candidate. Lots of recent experience in the field.

Cancel Save

~~In a scored setting, enter your score, enter any comments and then click Save.~~

Carla Newman

Person ID : 31400911

Overall Comments

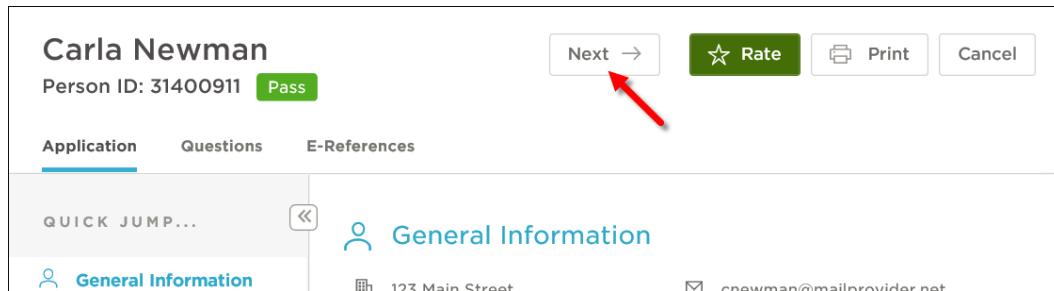
Excellent candidate. Lots of recent experience in the field.

Maria's Rating YOUR SCORE 95

Experience score: 50 out of 50
Education score: 45 out of 50

NEOGOV

7. Click Next to proceed to the next candidate pending your review.



Carla Newman
Person ID: 31400911 Pass

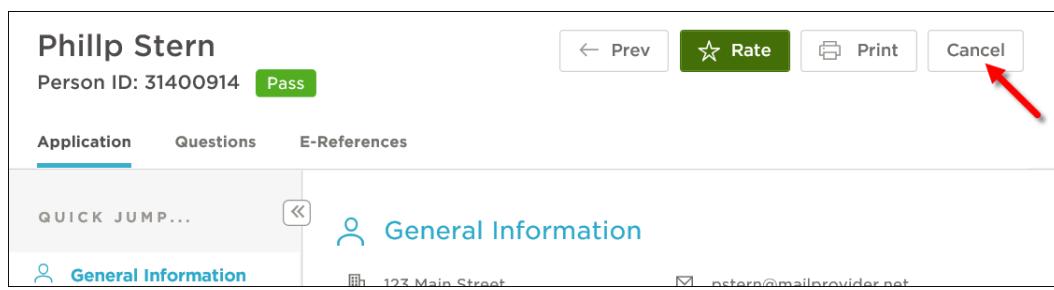
Application Questions E-References

QUICK JUMP... General Information

General Information 123 Main Street cnewman@mailprovider.net

Next → Rate Print Cancel

8. Repeat these rating steps until Next no longer displays. Click Cancel or click anywhere to the left of the last candidate's application review page.



Phillip Stern
Person ID: 31400914 Pass

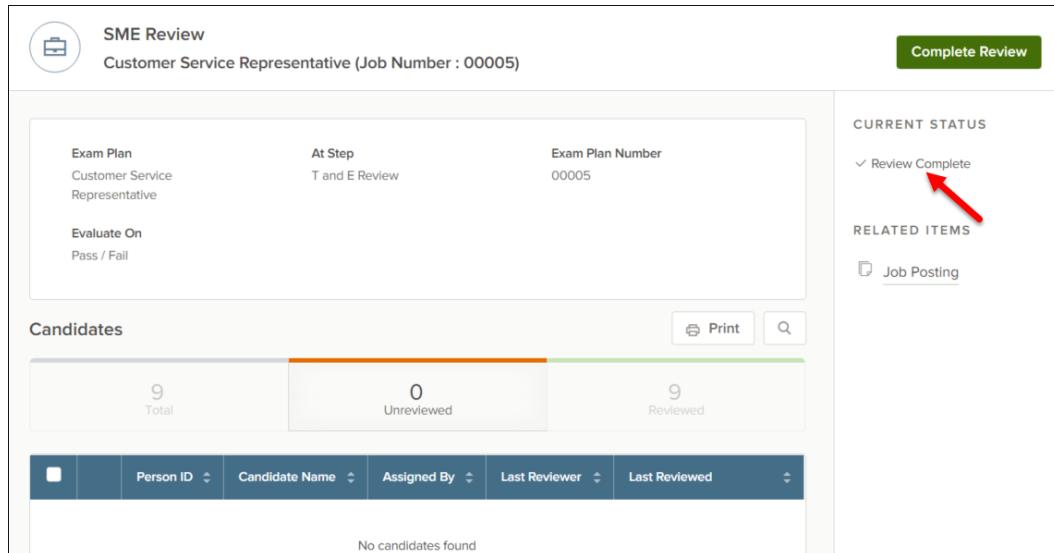
Application Questions E-References

QUICK JUMP... General Information

General Information 123 Main Street nstern@mailprovider.net

← Prev Rate Print Cancel

9. Notice you have no unreviewed candidates and your SME review status is complete.



SME Review
Customer Service Representative (Job Number : 00005)
Complete Review

Exam Plan At Step Exam Plan Number
Customer Service Representative T and E Review 00005

Evaluate On
Pass / Fail

CURRENT STATUS
✓ Review Complete

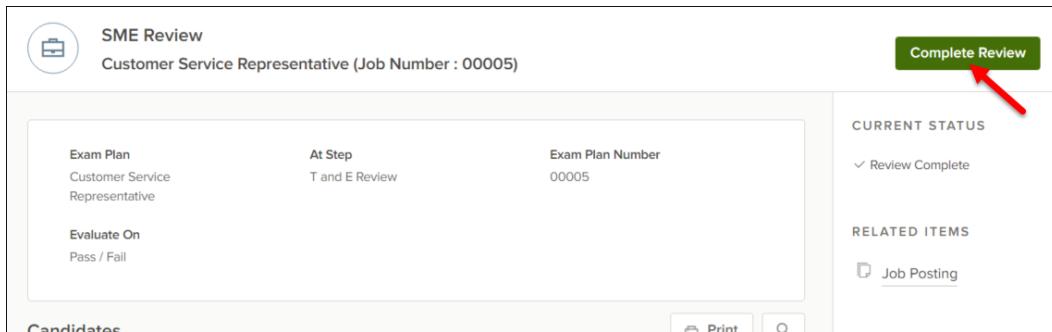
RELATED ITEMS
Job Posting

Candidates
Print
9 Total 0 Unreviewed 9 Reviewed

No candidates found

NEOGOV

10. Click Complete Review and then click OK to notify, via email, the assigned recruiter and other subject matter experts that you have completed your review.



SME Review
Customer Service Representative (Job Number : 00005)

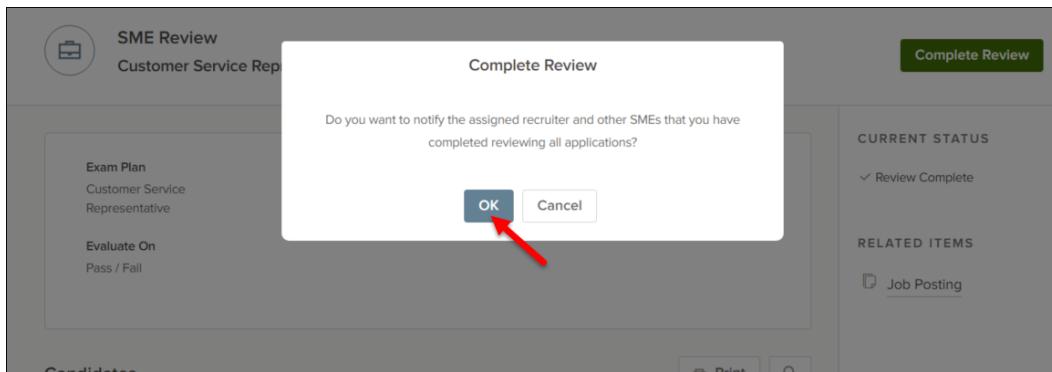
Exam Plan: Customer Service Representative
At Step: T and E Review
Exam Plan Number: 00005

Evaluate On: Pass / Fail

Complete Review

CURRENT STATUS
✓ Review Complete

RELATED ITEMS
Job Posting



Complete Review

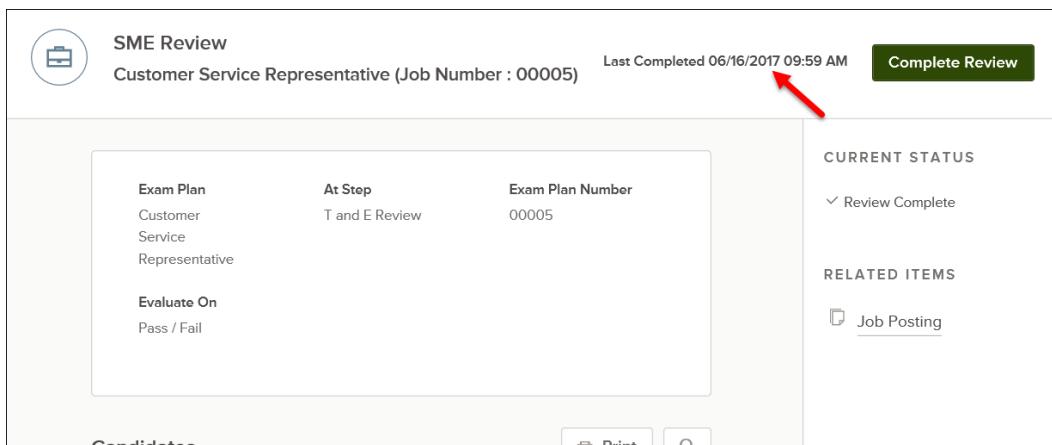
Do you want to notify the assigned recruiter and other SMEs that you have completed reviewing all applications?

OK **Cancel**

CURRENT STATUS
✓ Review Complete

RELATED ITEMS
Job Posting

The date and time of your last completed review notification will display.



SME Review
Customer Service Representative (Job Number : 00005)

Exam Plan: Customer Service Representative
At Step: T and E Review
Exam Plan Number: 00005

Evaluate On: Pass / Fail

Last Completed 06/16/2017 09:59 AM

Complete Review

CURRENT STATUS
✓ Review Complete

RELATED ITEMS
Job Posting

11. If additional candidates are sent to you in the future, complete the review, and then click Complete Review, to once again notify the assigned recruiter and other subject matter experts of your completed review.

Set up a Rater

In the previous version, if you were given the OHC role of Hiring Manager, you could extend an offer and hire a candidate or fail them after an interview. Now, with the new OHC role of Rater, you can rate candidates on a referred list based on a star rating, pass/fail and scored methods. Since the OHC role is completely new, you'll need to set up at least one rater to try it out.

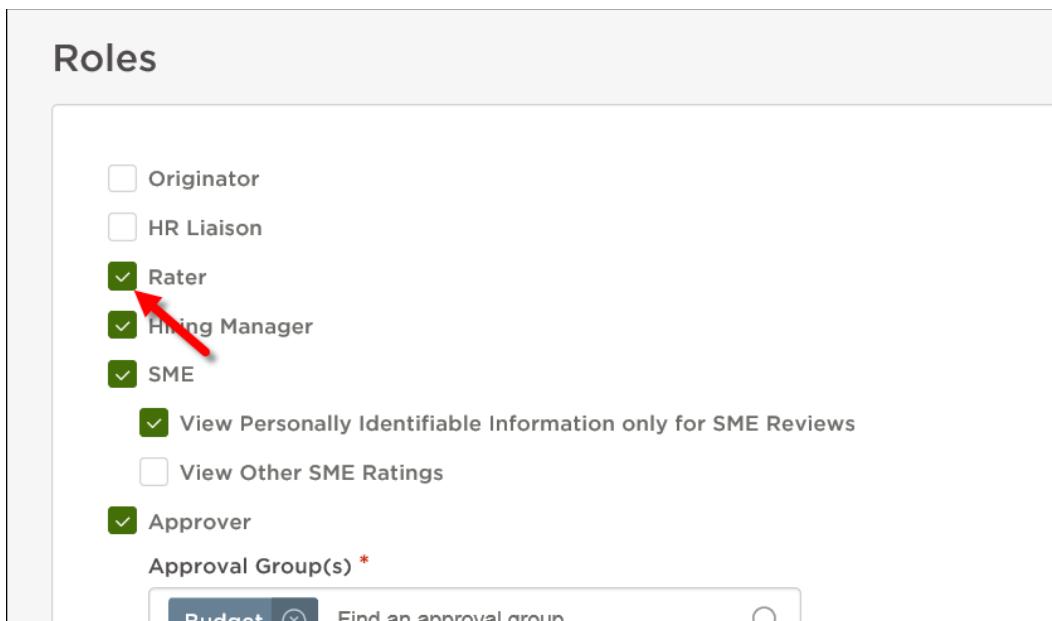
With the OHC role of HR Liaison and the Allow Liaison to Maintain OHC Users permission selected (Insight navigation: Admin > Agency Preferences > OHC Security), you can set up a rater.

Steps to Set up a Rater

1. From the upper right, click the Settings button. It looks like a gear.



2. Click Users and click the name of a user that will have the OHC role of Rater.
3. Click Edit and select Rater.



4. Once you're done, click Save.
5. Repeat these steps for any additional users that will have the OHC role of Rater.

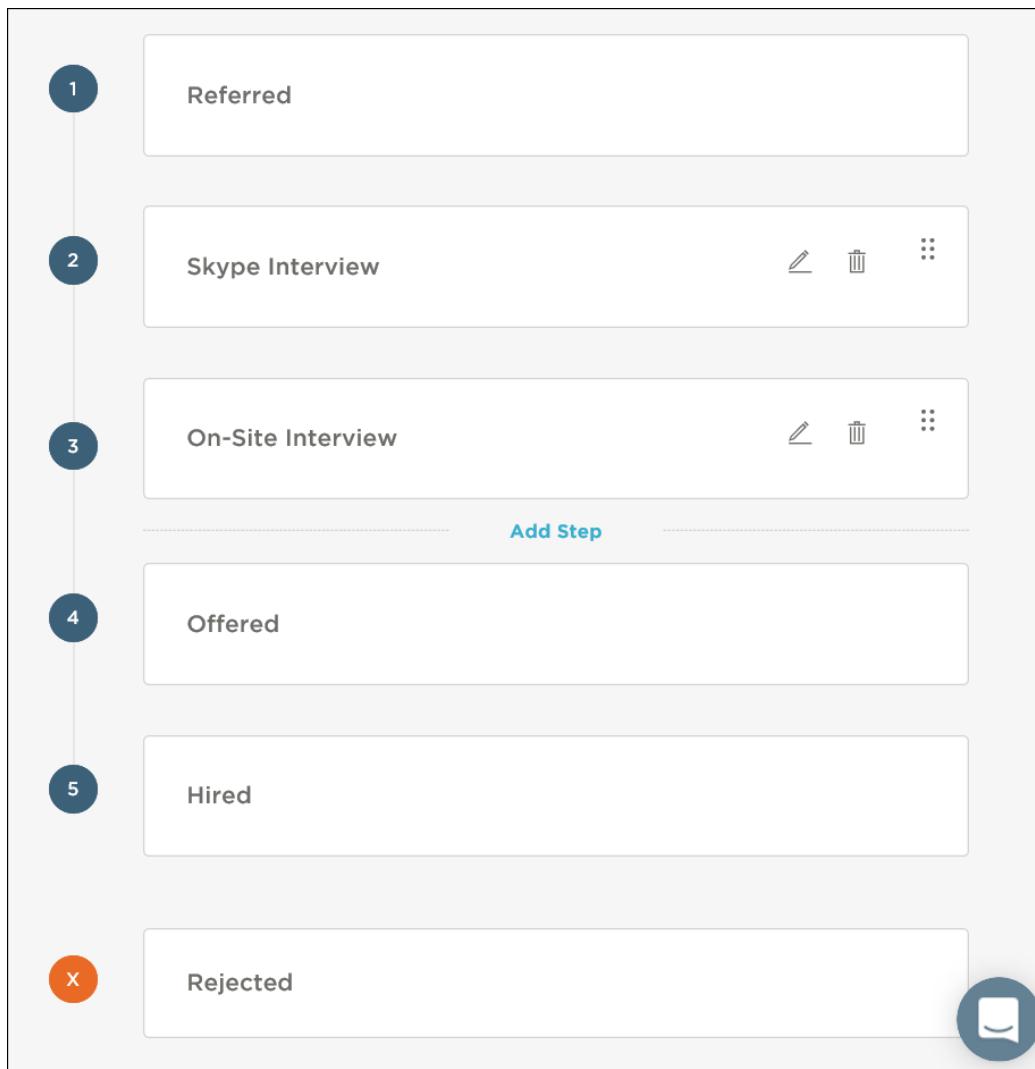
Customize a Hire Workflow

With the OHC role of Hiring Manager or HR Liaison you can customize a hire workflow.

In the previous version of the OHC, candidates on a referred list traveled through a total of five preset hire workflow steps including initial referral, interview, offer, hire and rejection.

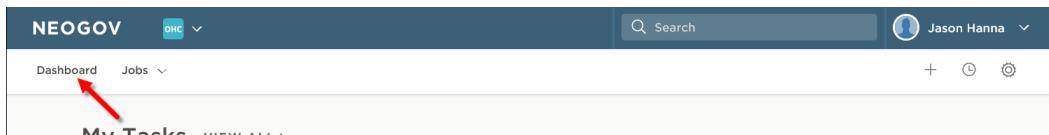
Referred (7)	Interview Scheduled (0)	Offer Pending (0)	Hired (0)	Rejected (0)				
Name	Referral Code	Master Profile	Action Date	Email Notify	Notices	Referral Expires	Elig List Type	
Barajas, Sandro	000015	View	05/02/16		N/A	2/29/2016	Normal	
Daniels, Paula	000015	View	05/02/16		N/A	2/29/2016	Normal	
Ferguson, Randy	000015	View	05/02/16		N/A	2/29/2016	Normal	
Hansen, James	000015	View	05/02/16		N/A	2/29/2016	Normal	
Mattix, Armando	000015	View	05/02/16		N/A	2/29/2016	Normal	
Newman, Bettina	000015	View	05/02/16		N/A	2/29/2016	Normal	
Pearson, Albert	000015	View	05/02/16		N/A	2/29/2016	Normal	

These preset steps still exist in the new OHC and now you can add additional pre-offer steps; creating your own customized hire workflow.



Steps to Customize a Hire Workflow

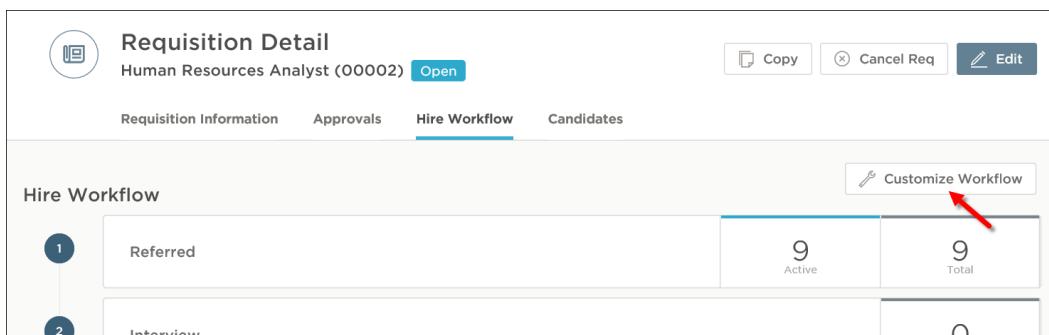
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. From the My Candidates section, click the referred list that will have a custom hire workflow.



3. Click the Hire Workflow tab and click Customize Workflow.



4. From the Interview step, click . This will be the step to immediately follow the referral of candidates. Update the step name, rating method, scale and pass point. Also, if you know who will be conducting the interviews, click , select the applicable rater(s), and then click Done.

Step Details

Name *
Skype Interview

Evaluate Using
 Pass/Fail
 Star Rating
 Percentage

Display Status to Candidate As
Skype Interview

Scale
 5 Stars
 10 Stars

Raters
Simon Davies  
- Start typing to find a rater -

Pass Point
 3 Stars

Comment

5. Once you're done, click Save & Continue to set up pre-configured interview slots for scheduling.

Note: If you're not yet ready to set up interview slot, click Save & Close and return back later.

6. From the Pre-Configure Interview Slots switch, click to the on setting.

7. Will candidates be allowed to sign back into Career Pages and self-schedule for interviews? If so, enable self-scheduling! From Allow Candidate Self-Scheduling switch, click to the on setting.

8. Continue with setting up the interview slots including: locations(s), date(s), times and breaks. The preview pane will conveniently display your interview slots, per day, based on the lengths of time.

Appointment Scheduling

Pre-Configure Interview Slots

Allow Candidate Self-Scheduling

1 Select Location(s)

X
?

Start typing to find a location...

2 Select Available Dates

X

X

X

X

3 Select Times

Start Time	End Time	Duration *	Time Between Slots *
<input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;" type="text" value="10:00 AM"/> ^ v	^ v	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;" type="text" value="45 min"/> ^ v	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 2px;" type="text" value="15 min"/> ^ v

4 Add Breaks

^
v

^
v

-

+

^
v

^
v

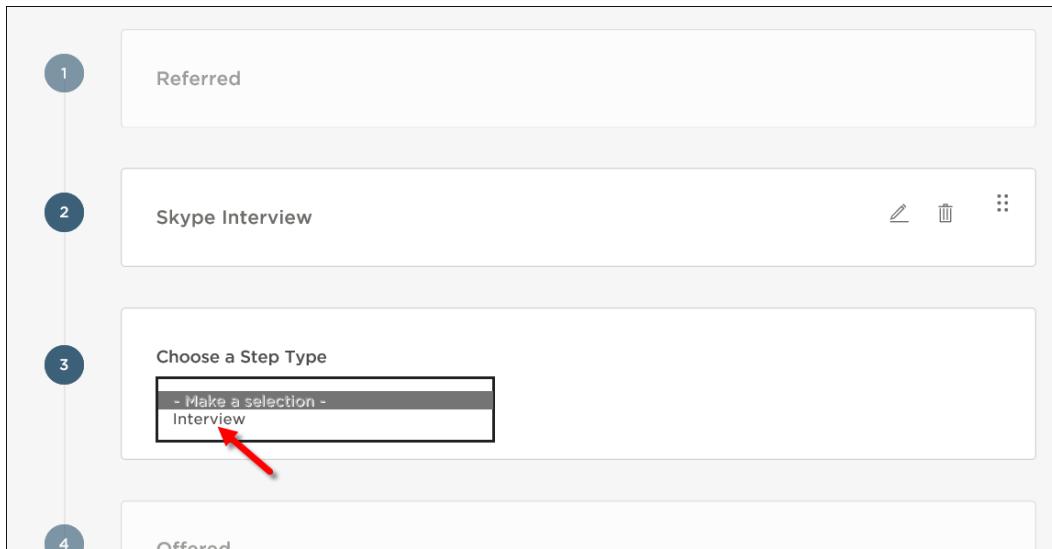
-

+

10AM	10:00 AM - 10:45 AM	Appointment Slot 1
11AM	11:00 AM - 11:45 AM	Appointment Slot 2
12PM	12:00 PM - 1:00 PM	Break 1
1PM	1:00 PM - 1:45 PM	Appointment Slot 3
2PM	2:00 PM - 2:30 PM	Break 2
3PM	2:30 PM - 3:15 PM	Appointment Slot 4

9. Once you're done, click Save & Close.

10. Will there be another pre-offer step? If so, click Add Step and select Interview.



11. Once again, from the Interview step, click . Update the step name, rating method, scale and pass point. Also, if you know who will be conducting the interviews, click , select the applicable rater(s), and then click Done.

Step Details

Name *: On-Site Interview

Evaluate Using: Percentage

Display Status to Candidate As: On-Site Interview

Max Score *: 100.00

Passing Score % *: 70.00

Raters: Simon Davies (selected)

Comment: (empty)

12. Once you're done, click Save & Continue to set up pre-configured interview slots for scheduling.

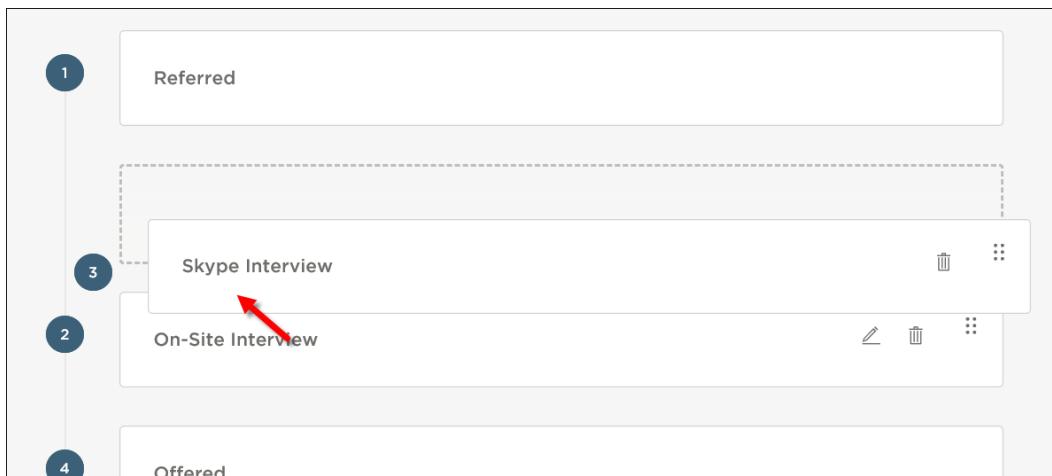
NEOGOV

13. Repeat steps 6 through 9 to set up interview slots.

Note: This guide illustrates an example of two-interview process: a Skype interview and an on-site interview. Of course, this example only scratches the surface of all the custom workflows that you can create. Although the step type is referred to as an “interview,” it can be used for any type of pre-offer assessment. E.g., a performance exam or an agility test.

14. Repeat these steps for any additional pre-offer hire workflow steps.

15. Are your hire workflow steps in the proper order? If not, you can easily correct with a drag-and-drop operation.



16. Once you're done, click Close.

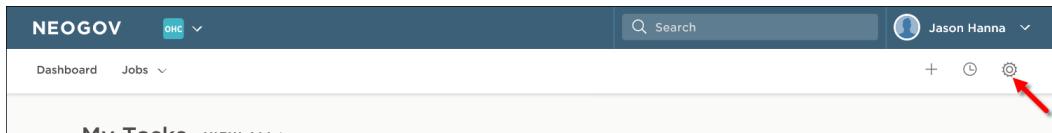
Set up a Notice Template

With the OHC permission of Create OHC Notice Templates you can create a notice template for your assigned department(s)/division(s).

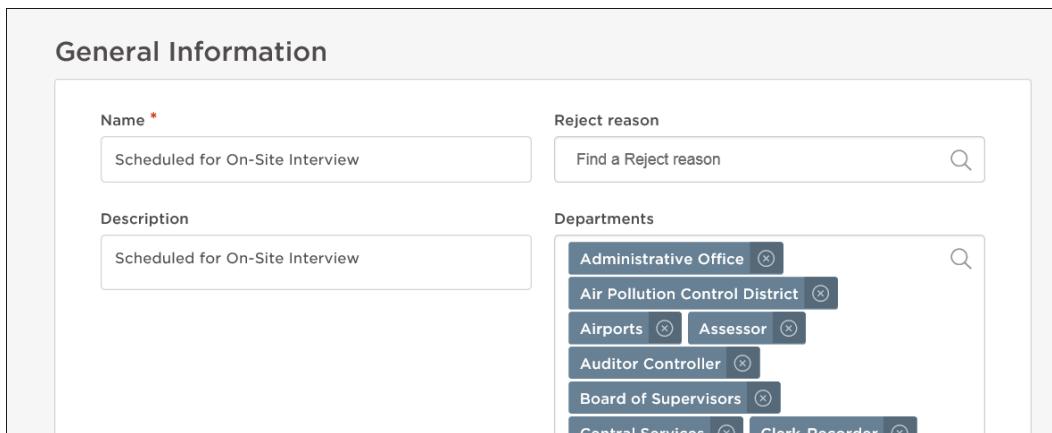
Notice templates can be used for a variety of notice types including interview scheduling, assessment results, candidate rejection and job offer.

Steps to Set up a Notice Template

1. From the upper right, click the Settings button. It looks like a gear.



2. Click Notice Templates and click Add.
3. The first of two notice template pages will display.



General Information

Name *: Scheduled for On-Site Interview

Reject reason: Find a Reject reason

Description: Scheduled for On-Site Interview

Departments:

- Administrative Office
- Air Pollution Control District
- Airports
- Assessor
- Auditor Controller
- Board of Supervisors
- Central Services
- Clerk-Recorder

4. Complete the notice template page and click Save & Continue to Next Step.

5. Type the contents of your notice template. When a merge field is required, locate it using left-side search and then drag to the proper area of the notice. Also, drag any applicable files to the attachments section.

The screenshot shows the 'Create Notice Template' interface. On the left, a sidebar lists categories: APPLICANT, USER, AGENCY, POSITION, REQUISITION, REFERRAL, REFERRED LIST - INTERVIEW, REFERRED LIST - OFFERED, REFERRED LIST - HIRED, REFERRED LIST - REJECTED, and GENERAL. The APPLICANT section is currently selected. On the right, the '2. COMPOSE NOTICE' tab is active. The compose area contains a rich text editor with a toolbar. A red arrow points from the 'APPLICANT' section in the sidebar to the merge field <Applicant_FirstName> in the compose area. The compose area also contains a message to the applicant, details about the interview location and time, and a note about meeting soon. Below the compose area is an attachments section with a 'Drag and drop your file here, or browse' area. A red arrow points to a 'Map' file icon in this section. The attachments section also specifies supported file types: .doc, .docx, .gif, .jpg, .pdf, .png, .ppt, .pptx, .rtf, .txt.

Note: In the previous version of the OHC, inserting a merge field was a process of either typing or copying and pasting, from left angle bracket (<) to right angle bracket (>), e.g., <Applicant_LastName>. With the new OHC, dragging the merge field to the notice body is required. Typing or copying and pasting the merge field will not work properly.

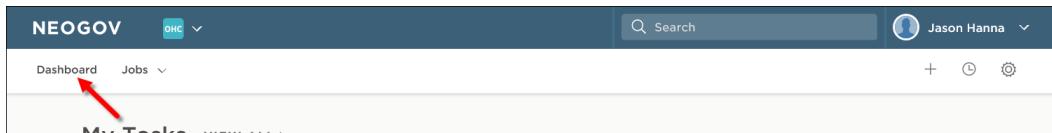
6. Once you're done, click Save & Close.

Schedule Interviews

With the OHC role of Hiring Manager or HR Liaison you can schedule interviews.

Steps to Schedule Interviews

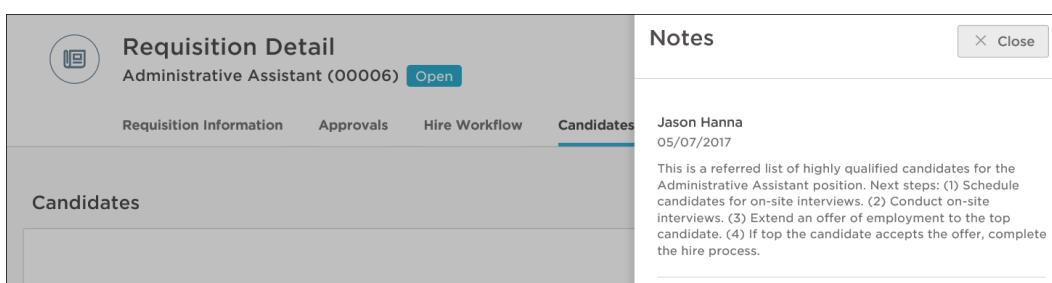
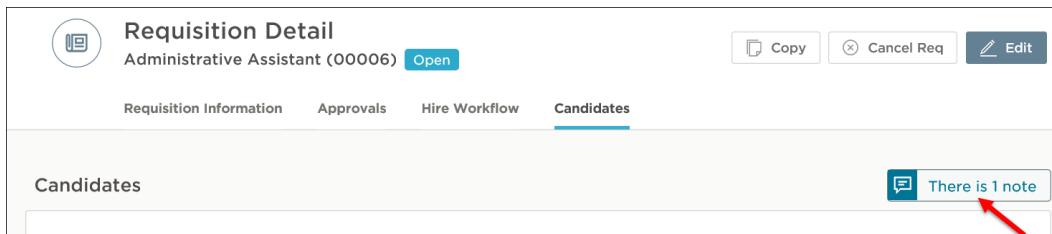
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. From the My Candidates section, click the referred list that will have scheduled interviews.

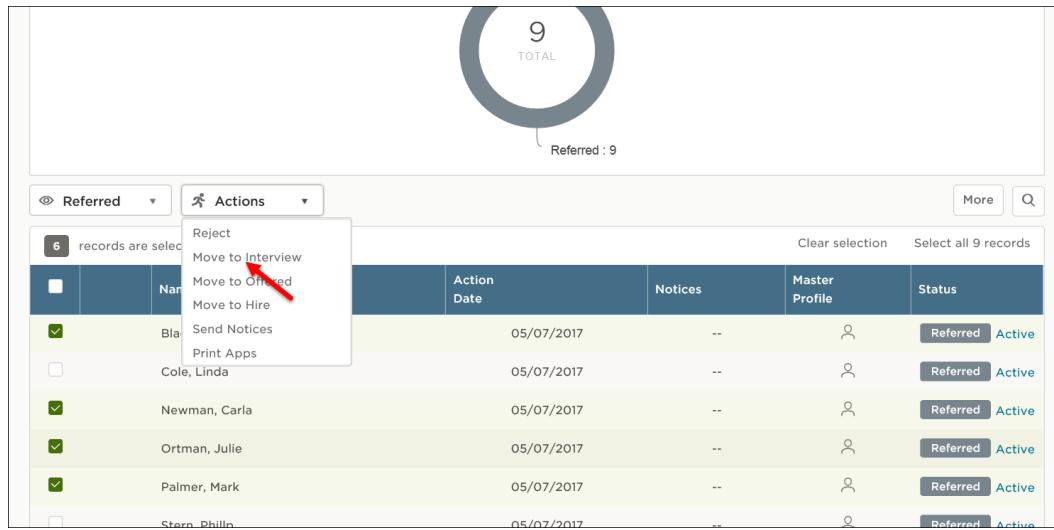


Note: If the HR staff member left one or more notes on the referred list for you, a button will display indicating the number of notes available to read.



3. Select the candidates that will be moved to the interview step.

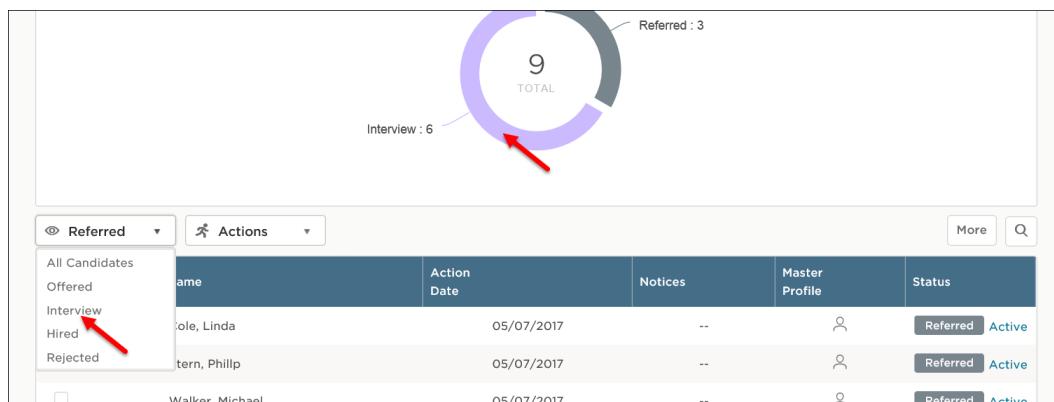
4. On the Actions menu, click Move to Interview.



Note: Your hire workflow may have a customized name for the interview step, e.g., On-Site Interview. If so, click the customize name to move the candidates to that step.

5. Click OK to confirm moving the candidates.

6. The selected candidates have been moved from the referred step to the interview step. To see them again, the view must be switched to the interview step candidates. On the doughnut chart, click Interview, or on the Candidates menu, click Interview.



7. From the first candidate to be scheduled for an interview, click Unscheduled.

	Name	Action Date	Notices	Master Profile	Status	Rating
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--		Interview Unscheduled	No Rating
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		Interview Unscheduled	No Rating
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--		Interview Unscheduled	No Rating

8. If you do not have pre-configured interviewed slots, a full-detail schedule form will display including date, time, location and interviewer(s). Complete the form and click Save.

Interview Details

Interview Date *

CALENDAR

Location

LOCATION

Start Time

UP

to

DOWN

End Time

TIMEZONE

Interviewer

SEARCH

< October 17, 2017 >
Today
Month
Week
Day

9. If you have pre-configured interview slots, you will only need to select the location and date/time. Once you're done, click Schedule.

Schedule Interview

TOTAL
9
Interview : 6

Interview Location *

LOCATION

TUESDAY, OCTOBER 17, 2017

10:00 AM
11:00 AM
1:00 PM
2:00 PM

THURSDAY, OCTOBER 19, 2017

10:00 AM
11:00 AM
1:00 PM
2:00 PM

10. Repeat these steps to schedule the remaining candidates for interviews.

Send Notices

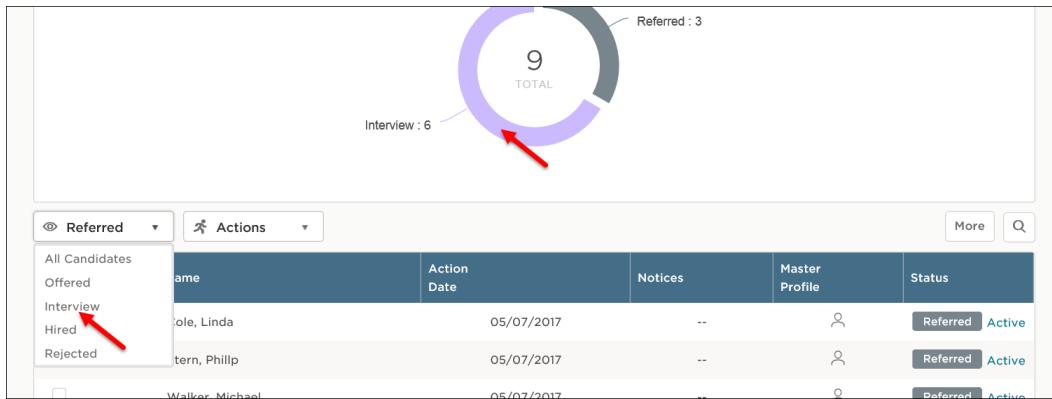
With the OHC role of Hiring Manager or HR Liaison and the OHC permission of Send OHC Notices, you can send notices.

Steps to Send Notices

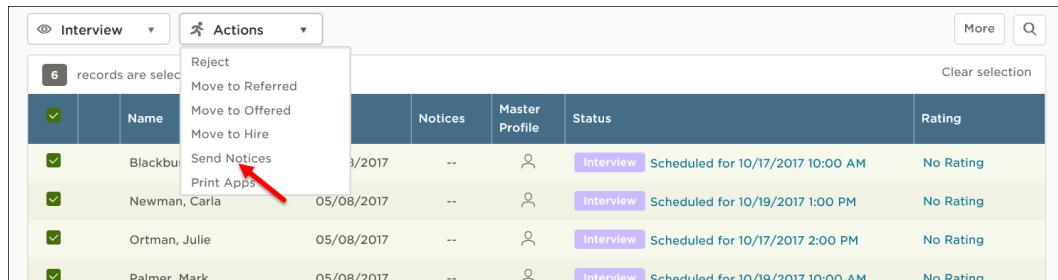
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

My Candidates						
Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017
Showing 1 - 2 of 2 items						

2. On the doughnut chart or on the Candidates menu, click the step name where candidates require notification.



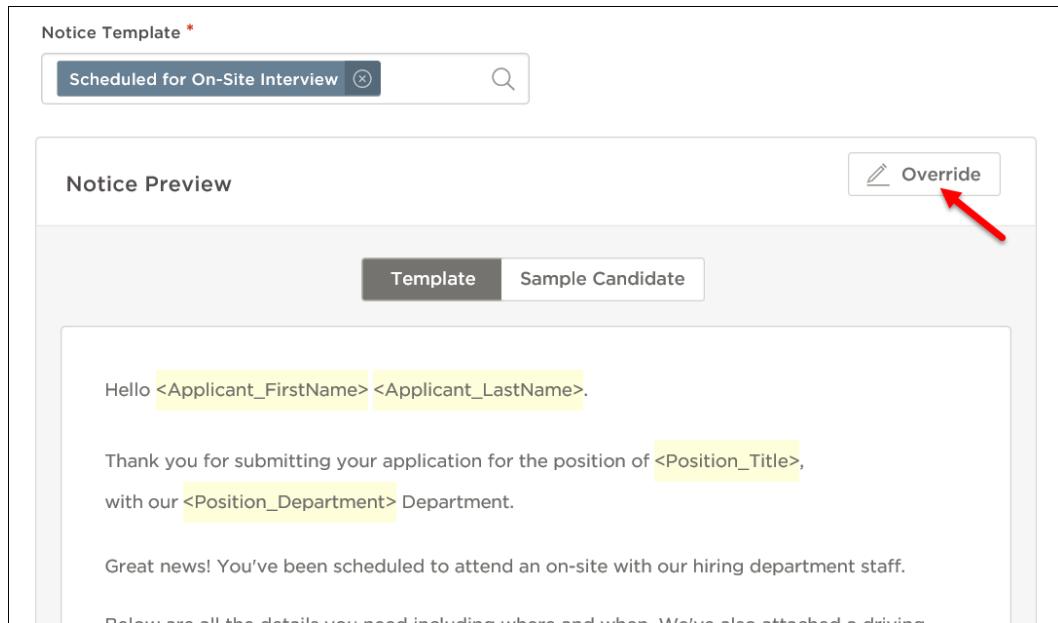
3. Select the candidates to receive notices.
4. On the Actions menu, click Send Notices.



A screenshot of the NEOGOV software interface. At the top, there are two dropdown menus: 'Interview' and 'Actions'. Below these, a sub-menu for 'Actions' is open, showing options: 'Reject', 'Move to Referred', 'Move to Offered', 'Move to Hire', 'Send Notices', and 'Print Apps'. The 'Send Notices' option is highlighted with a red arrow. The main table below lists four candidates: Blackbu, Newman, Carla, Ortman, Julie, and Palmer, Mark. Each row includes a checkbox, the candidate's name, their application date (05/08/2017), their status (--), their master profile (a person icon), and their interview status (Interview, Scheduled for 10/17/2017 10:00 AM, No Rating). The table has columns for Notices, Master Profile, Status, and Rating.

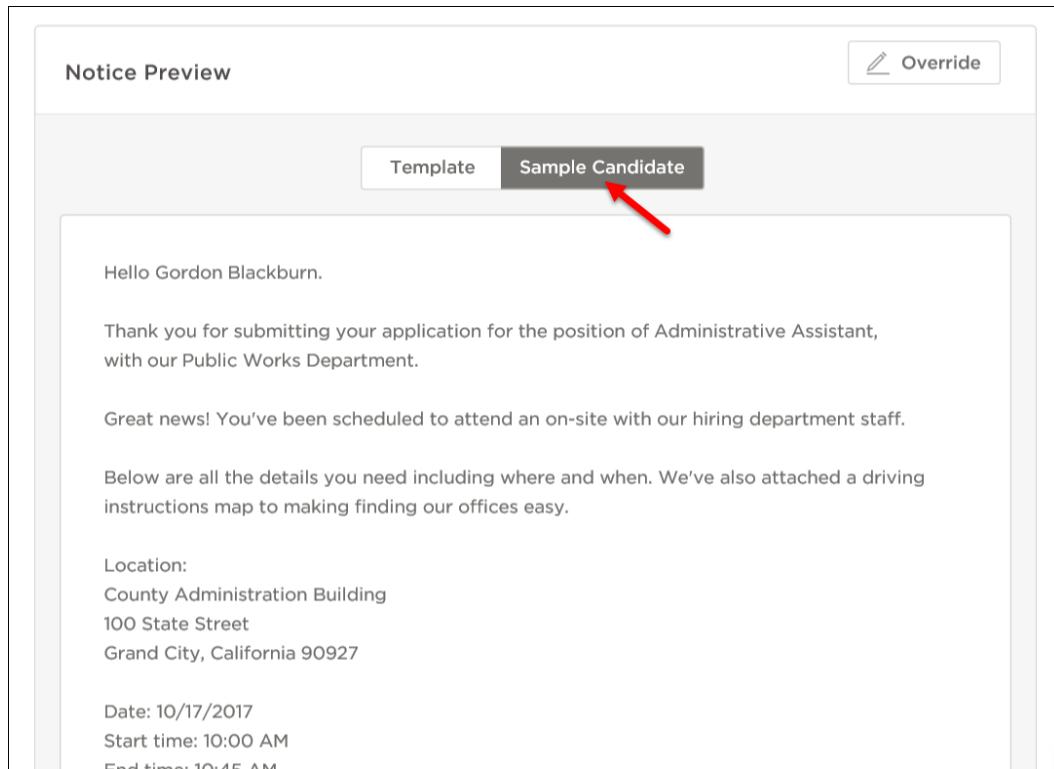
	Name	Notices	Master Profile	Status	Rating
<input checked="" type="checkbox"/>	Blackbu	05/08/2017	--	Interview Scheduled for 10/17/2017 10:00 AM	No Rating
<input checked="" type="checkbox"/>	Newman, Carla	05/08/2017	--	Interview Scheduled for 10/19/2017 1:00 PM	No Rating
<input checked="" type="checkbox"/>	Ortman, Julie	05/08/2017	--	Interview Scheduled for 10/17/2017 2:00 PM	No Rating
<input checked="" type="checkbox"/>	Palmer, Mark	05/08/2017	--	Interview Scheduled for 10/19/2017 10:00 AM	No Rating

5. Select a notice template.
6. If necessary, click Override to make a one-time update to the notice prior to sending. This update will not affect the saved notice template.



A screenshot of the 'Notice Template' configuration screen. At the top, there is a search bar with the text 'Scheduled for On-Site Interview'. Below the search bar is a 'Notice Preview' section. In the 'Notice Preview' section, there is a 'Template' tab and a 'Sample Candidate' tab. The 'Template' tab is selected. The preview content includes a greeting 'Hello <Applicant_FirstName> <Applicant_LastName>.', a thank you message 'Thank you for submitting your application for the position of <Position_Title>, with our <Position_Department> Department.', and a confirmation message 'Great news! You've been scheduled to attend an on-site with our hiring department staff.' At the top right of the 'Notice Preview' section is a 'Override' button, which is highlighted with a red arrow.

7. Click Sample Candidate to view the notice with merged text.



Notice Preview

Override

Template **Sample Candidate**

Hello Gordon Blackburn.

Thank you for submitting your application for the position of Administrative Assistant, with our Public Works Department.

Great news! You've been scheduled to attend an on-site with our hiring department staff.

Below are all the details you need including where and when. We've also attached a driving instructions map to making finding our offices easy.

Location:
County Administration Building
100 State Street
Grand City, California 90927

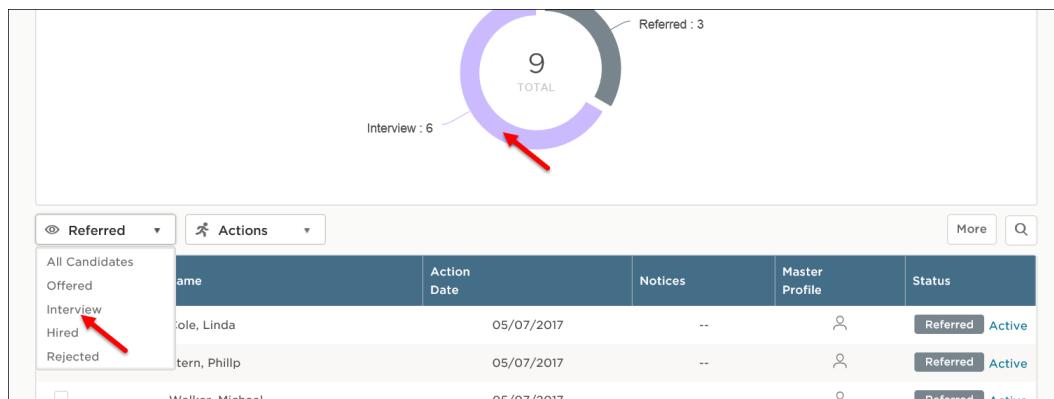
Date: 10/17/2017
Start time: 10:00 AM
End time: 10:45 AM

8. Click Send to send the notice to all selected candidates.

Steps to Send an Individual Notice

Rather than sending notices in bulk, you can send an individual candidate a notice. This practice may come in handy if each candidate notice must have its own personalized verbiage.

1. Go to your referred list.
2. On the doughnut chart or on the Candidates menu, click the step name a candidate requires a notification.



Referred : 3

9 TOTAL

Interview : 6

Referred

Actions

All Candidates Offered

Interview

Hired

Rejected

Name	Action Date	Notices	Master Profile	Status
Bole, Linda	05/07/2017	--		Referred Active
Gurn, Phillip	05/07/2017	--		Referred Active
Walker, Michael	05/07/2017	--		Referred Active

3. Click the name of the candidate to receive the notice.

	Name	Action Date	Notices	Master Profile	Status	Rating
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--		Interview Scheduled for 10/17/2017 10:00 AM	No Rating
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		Interview Scheduled for 10/19/2017 1:00 PM	No Rating
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--		Interview Scheduled for 10/17/2017 2:00 PM	No Rating
<input type="checkbox"/>	Palmer, Mark	05/08/2017	0		Interview Scheduled for 10/10/2017 10:00 AM	No Rating

4. On the Actions menu, click Send Notices.

Carla Newman
Person ID: 31400911 Interview

Application Questions E-References Notices History

QUICK JUMP... General Information

General Information: 123 Main Street, Los Angeles, CA 90001

Work Experience Education

Actions

- Reject
- Move to Referred
- Move to Offered
- Move to Hire
- Send Notices**
- Schedule Interview
- Rate

5. Select a notice template.

6. If necessary, click Override to make a one-time update to the notice prior to sending. This update will not affect the saved notice template.

7. Click Sample Candidate to view the notice with merged text.

Notice Template *

Scheduled for On-Site Interview

Notice Preview

Template Sample Candidate

Hello Carla Newman.

Thank you for submitting your application for the position of Administrative Assistant, with our Public Works Department.

Great news! You've been scheduled to attend an on-site interview with our hiring department staff.

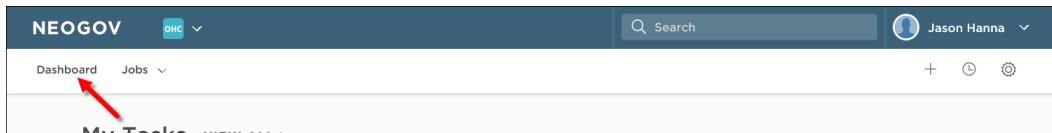
8. Click Send to send the notice to the candidate.

Rate an Interview

With the OHC role of Rater, you can rate an interview.

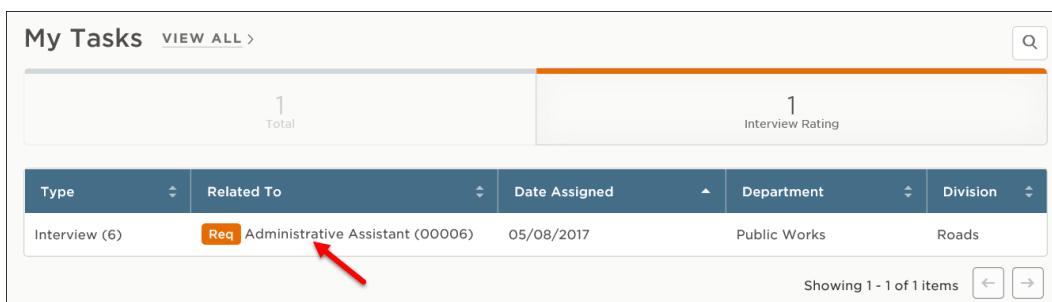
Steps to Rate an Interview

1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



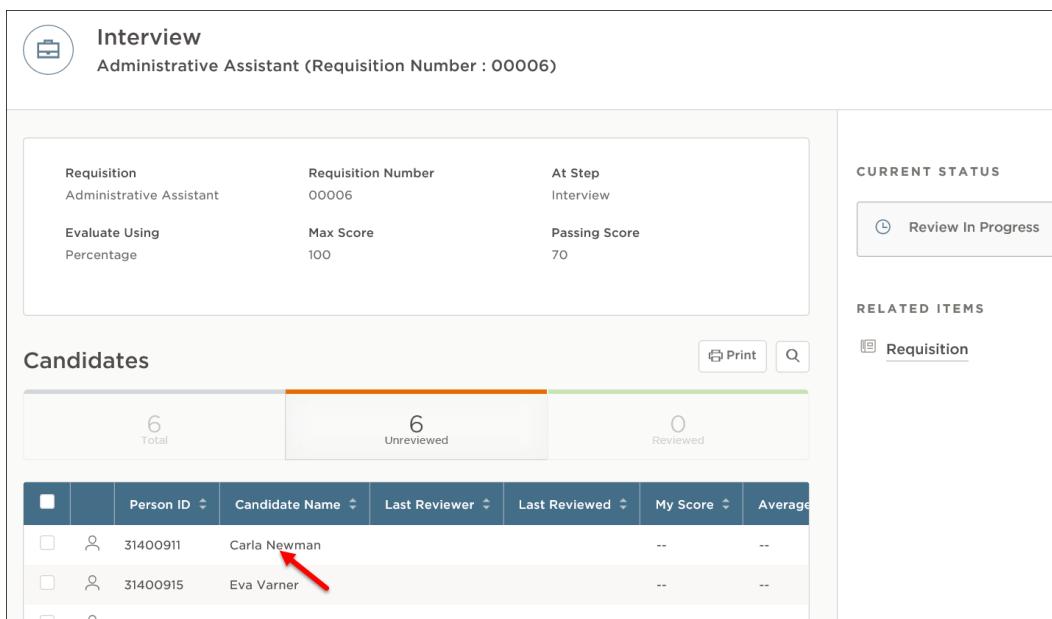
A screenshot of the NEOGOV dashboard. At the top, there is a dark blue header with the 'NEOGOV' logo on the left, an 'OHC' dropdown in the center, and a search bar and user profile on the right. Below the header is a light blue navigation bar with 'Dashboard' and 'Jobs' tabs. A red arrow points to the 'Dashboard' tab. Underneath is a section titled 'My Tasks' with a 'VIEW ALL' link.

2. From the My Tasks section, click the interview rating pending your review.



A screenshot of the 'My Tasks' section. At the top, it says 'My Tasks' with a 'VIEW ALL' link and a search icon. Below is a table with columns: Type, Related To, Date Assigned, Department, and Division. A row shows 'Interview (6)' under 'Type', 'Req Administrative Assistant (00006)' under 'Related To', '05/08/2017' under 'Date Assigned', 'Public Works' under 'Department', and 'Roads' under 'Division'. A red arrow points to the 'Req' status indicator. At the bottom, it says 'Showing 1 - 1 of 1 items' with navigation arrows.

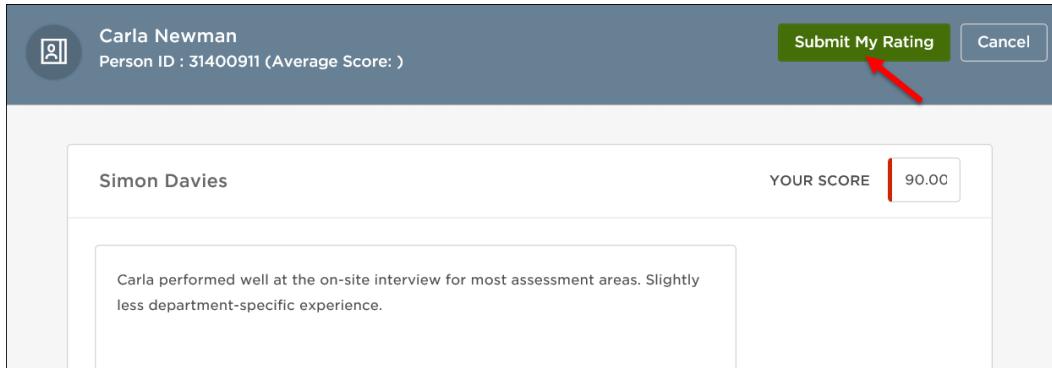
3. Click the name of the first candidate to be rated.



A screenshot of the interview details page. At the top, it says 'Interview' and 'Administrative Assistant (Requisition Number : 00006)'. Below is a table with columns: Requisition, Requisition Number, At Step. A row shows 'Administrative Assistant' under 'Requisition', '00006' under 'Requisition Number', and 'Interview' under 'At Step'. To the right is a 'CURRENT STATUS' box with 'Review In Progress'. Below is a 'RELATED ITEMS' box with 'Requisition'. The main area is titled 'Candidates' and shows a table with columns: Person ID, Candidate Name, Last Reviewer, Last Reviewed, My Score, Average. It lists three candidates: 'Carla Newman' (Person ID 31400911), 'Eva Varner' (Person ID 31400915), and 'Gordon Blackburn' (Person ID 31400910). A red arrow points to the name 'Carla Newman'.

NEOGOV

4. Click Rate and enter your rating. Depending on how the step is configured, this can be a pass or fail, a star rating, or a numeric value. Also, enter any comments and click Submit My Rating.



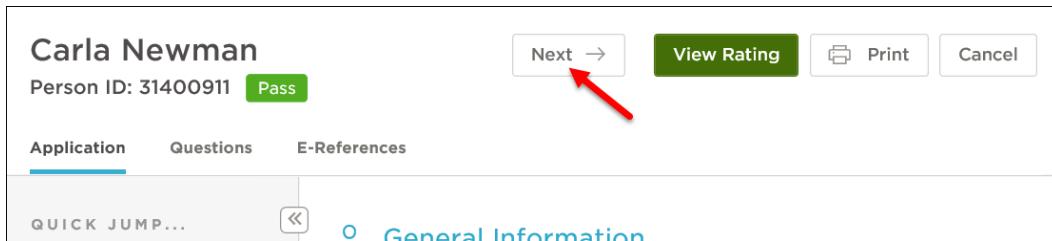
Carla Newman
Person ID : 31400911 (Average Score: :)

Submit My Rating Cancel

Simon Davies YOUR SCORE 90.00

Carla performed well at the on-site interview for most assessment areas. Slightly less department-specific experience.

5. Click Next to proceed to the next candidate pending your rating.



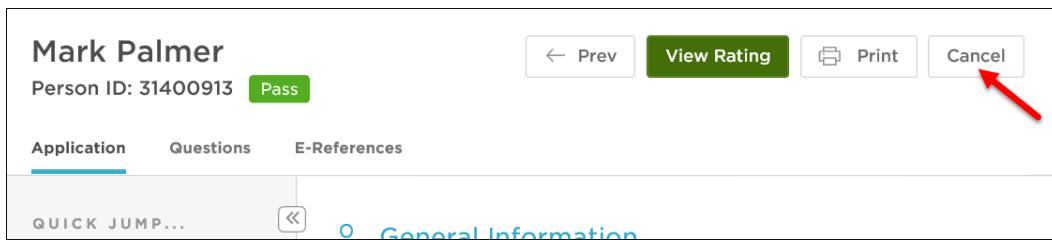
Carla Newman
Person ID: 31400911 Pass

Next → View Rating Print Cancel

Application Questions E-References

QUICK JUMP... 0 General Information

6. Repeat these rating steps until Next no longer displays. Click Cancel or click anywhere to the left of the last candidate's application review page.



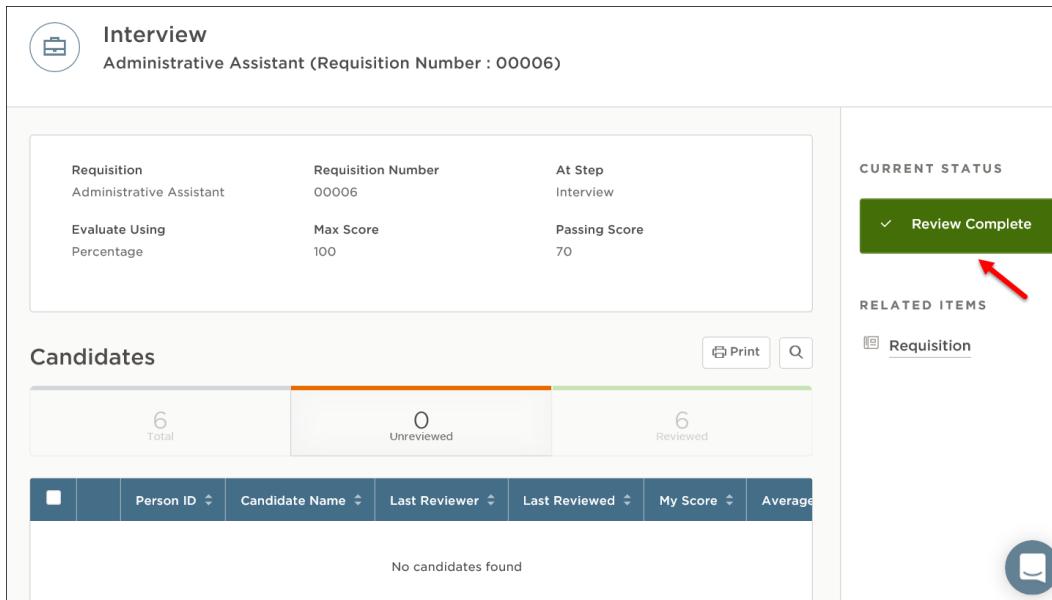
Mark Palmer
Person ID: 31400913 Pass

← Prev View Rating Print Cancel

Application Questions E-References

QUICK JUMP... 0 General Information

7. Notice you have no unreviewed candidates and your review status is complete.



The screenshot shows the 'Interview' page for 'Administrative Assistant (Requisition Number : 00006)'. The 'CURRENT STATUS' section displays a green button with a checkmark and the text 'Review Complete'. A red arrow points to this button. The 'RELATED ITEMS' section shows a link to 'Requisition'. The 'Candidates' section displays a summary: 6 Total, 0 Unreviewed, and 6 Reviewed. Below this is a table with columns: Person ID, Candidate Name, Last Reviewer, Last Reviewed, My Score, and Average. The table shows five rows of candidate data.

Person ID	Candidate Name	Last Reviewer	Last Reviewed	My Score	Average
31400911	Carla Newman	Simon Davies	05/08/2017	90.00%	Pass 90.00%
31400915	Eva Varner	Simon Davies	05/08/2017	85.00%	Pass 85.00%
31400910	Gordon Blackburn	Simon Davies	05/08/2017	60.00%	Fail 60.00%
31400912	Julie Ortman	Simon Davies	05/08/2017	75.00%	Pass 75.00%
31400917	Kelley Vaughan	Simon Davies	05/08/2017	90.00%	Pass 90.00%

8. After the rating is complete, you can view the results from the workflow step.



The screenshot shows the 'Candidates' page with the same layout as the previous screenshot. The 'CURRENT STATUS' section is not visible. The 'RELATED ITEMS' section is not visible. The 'Candidates' section displays the same summary: 6 Total, 0 Unreviewed, and 6 Reviewed. Below this is a table with the same columns as the previous screenshot. The table shows the same five rows of candidate data, with the 'My Score' and 'Average' columns now including a 'Pass/Fail' status indicator.

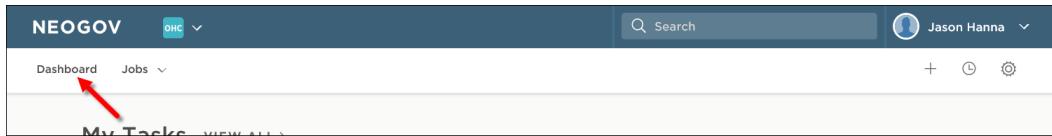
Person ID	Candidate Name	Last Reviewer	Last Reviewed	My Score	Average
31400911	Carla Newman	Simon Davies	05/08/2017	90.00%	Pass 90.00%
31400915	Eva Varner	Simon Davies	05/08/2017	85.00%	Pass 85.00%
31400910	Gordon Blackburn	Simon Davies	05/08/2017	60.00%	Fail 60.00%
31400912	Julie Ortman	Simon Davies	05/08/2017	75.00%	Pass 75.00%
31400917	Kelley Vaughan	Simon Davies	05/08/2017	90.00%	Pass 90.00%

Reject a Candidate

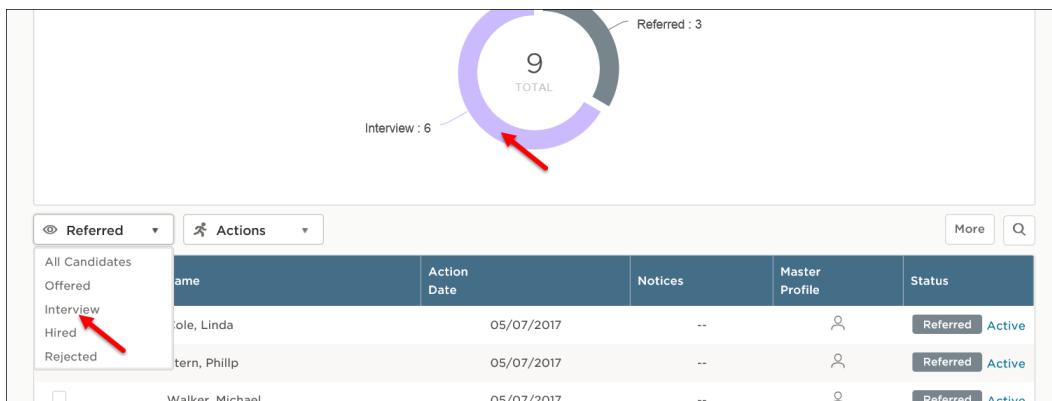
With the OHC role of Hiring Manager or HR Liaison, you can reject a candidate.

Steps to Reject a Candidate

1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.



2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and determined one or more will be rejected.



3. Click the name of the first candidate to be rejected.

	Name	Action Date	Notices	Master Profile	Status	Rating
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--		Interview Scheduled for 10/17/2017 1...	60.00%
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		Interview Scheduled for 10/19/2017 1...	90.00%
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--		Interview Scheduled for 10/17/2017 2...	75.00%
<input type="checkbox"/>	Palmer, Mark	05/08/2017	--		Interview Scheduled for 10/19/2017 1...	85.00%

4. On the Actions menu, click Reject.

Douglas Haddad
Person ID: 21987280 Skype Interview / Fail

Application Questions E-References Notices History

General Information

123 First Street (888) 555-5555
Springfield, CA 11111 (888) 555-5555

Reject

Move to Referred
Move to On-site Interview
Move to Offered
Move to Hire
Send Notices
Schedule interview
Rate

5. Click and select a reject reason.

6. If preferred, enter comments providing more details.

7. Additionally, you can choose to automatically send a notice to the candidate. From the "Automatically send a notice" switch, click to the on setting.

8. If a notice template is not linked to your reject reason, select the proper notice template

9. If necessary, click Override to make a one-time update to the notice prior to sending.

Reject Details

Reject Reason *

Not best qualified

Comments

Gordon did not pass the on-site interview process.

Notice

Automatically send a notice

Send email to the candidate(s) immediately after rejection

Notice Template *

Not Best Qualified

Notice Preview

Hello <Applicant_FirstName> <Applicant_LastName>.

Thank you for interviewing for the position of <Position_Title>, with our <Position_Department> Department.

We regret to inform you that you have not been selected for the position.

10. Once you're done, click Save.

11. Repeat these steps for any remaining rejected candidates.

Steps to Reject Candidates in Bulk

Alternatively, you can reject multiple candidates at the same time. This process will designate the same reject reason and comments for all selected candidates. As a result, you may have a few of rounds of bulk rejecting if candidates have different reject reasons and/or comments.

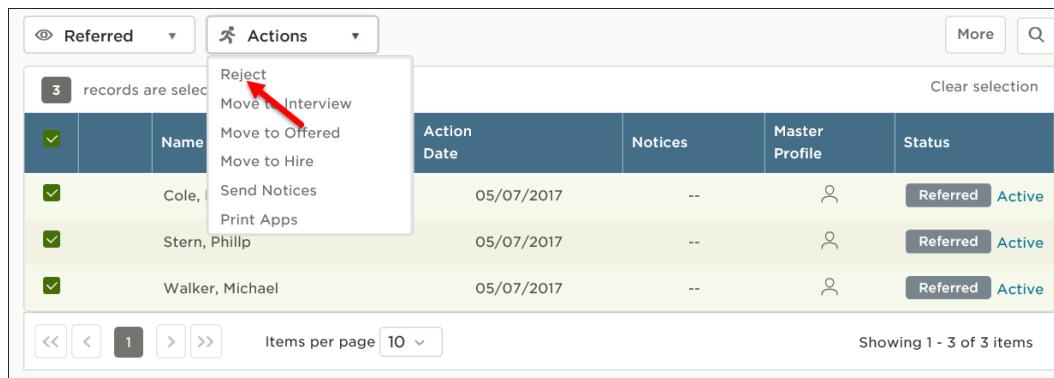
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.



Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items

2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and determined multiple will be rejected.
3. Select the all candidates that will have the same reject reason and comments.
4. On the Actions menu, click Reject.



Referred	Actions
3 records are selected	<ul style="list-style-type: none">RejectMove to InterviewMove to OfferedMove to HireSend NoticesPrint Apps

Action Date Notices Master Profile Status

05/07/2017 -- Cole,  Referred Active

05/07/2017 -- Stern, Phillip  Referred Active

05/07/2017 -- Walker, Michael  Referred Active

Items per page 10 Showing 1 - 3 of 3 items

5. Click  and select a reject reason.
6. If preferred, enter comments providing more details.
7. Additionally, you can choose to automatically send a notice to the candidate. From the "Automatically send a notice" switch, click to the on setting.
8. If a notice template is not linked to your reject reason, select the proper notice template

9. If necessary, click Override to make a one-time update to the notice prior to sending.

The screenshot shows the 'Reject' screen in the NEOGOV system. At the top, it displays the names of the candidates: Phillip Stern (Person ID: 31400914), Michael Walker (Person ID: 31400916), and 1 More. On the right, there are 'Cancel' and 'Save' buttons. The main area is divided into two sections: 'Reject Details' and 'Notice'.

Reject Details: This section contains a 'Reject Reason' field with the value 'Not selected for interview' and a 'Comments' field containing the text 'Candidate not best qualified. Was not scheduled for on-site interview.'

Notice: This section includes an 'Automatically send a notice' toggle switch (which is turned on, indicated by a checked checkbox), a note that says 'Send email to the candidate(s) immediately after rejection', a 'Notice Template' field with the value 'Not Selected for Interview', and two buttons at the bottom: 'Notice Preview' and 'Override'.

10. Once you're done, click Save.

11. Repeat these steps for any remaining rounds of rejected candidates.

Make an Offer

With the OHC role of Hiring Manager or HR Liaison, you can make an offer of employment for the preferred candidate.

Steps to Make an Offer

1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

My Candidates						
Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017
Showing 1 - 2 of 2 items						

2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and will make an offer for one of them.
3. Click the name the candidate to receive the offer.

	Name	Action Date	Notices	Master Profile	Status	Rating
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--		Interview Scheduled for 10/17/2017 1... Fail 60.00%	
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		Interview Scheduled for 10/19/2017 1... Pass 90.00%	
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--		Interview Scheduled for 10/17/2017 2... Pass 75.00%	
<input type="checkbox"/>	Palmer, Mark	05/08/2017	--		Interview Scheduled for 10/19/2017 1... Pass 95.00%	

4. On the Actions menu, click Move to Offered.

Carla Newman

Person ID: 31400911 Interview / Pass

[Application](#) [Questions](#) [E-References](#)

QUICK JUMP...   Gene 

[General Information](#)  123 Main  Los Angeles, CA 90001

[Work Experience](#)

Actions Print Cancel

Reject
Move to Referred
Move to Offered 
Move to HR
Send Notices
Schedule interview
Rate

5. Enter the offer date and any additional details including dollar values and comments.

Make Offer

Carla Newman (Person ID : 31400911)

Offer Details

Offer Date *

10/24/2017 

Offer Amount

\$ 50000.00

Bonus Amount

\$

Comment

Cancel **Save & Submit**

6. Once you're done, click Save & Submit.

Steps to Update Offer Status

If the candidate has accepted or rejected your offer of employment, the status can be updated to track the event.

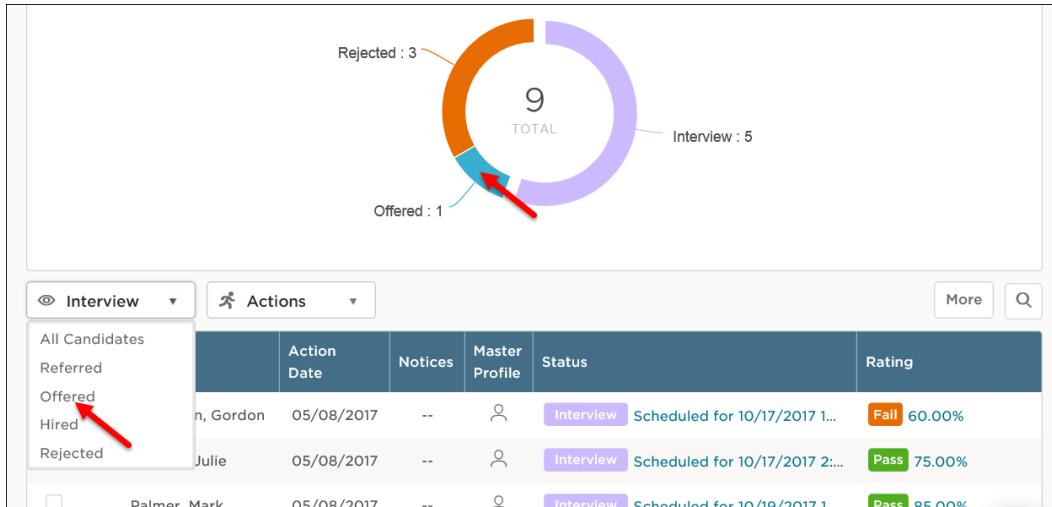
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

My Candidates

Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items  

2. On the doughnut chart or on the Candidates menu, click the offered step.



3. From the Status column, click Pending.

The screenshot shows a table with columns: Name, Action Date, Notices, Master Profile, and Status. The 'Status' column contains buttons for Offered and Pending. A red arrow points to the 'Pending' button for the candidate Newman, Carla, who is listed as 'Scheduled for 10/17/2017'.

Name	Action Date	Notices	Master Profile	Status
Newman, Carla	05/08/2017	--	0	Offered Pending

4. Click Edit and either Accepted or Rejected.

5. Enter the response date and any additional details.

The screenshot shows the 'Make Offer' form. At the top, it says 'Carla Newman (Person ID : 31400911)' with 'Cancel' and 'Save & Submit' buttons. Below that is a section for 'Offer Details' with fields for 'Offer Date *' (10/24/2017), 'Offer Response Date' (10/25/2017), 'Offer Amount' (\$ 50000.00), and 'Bonus Amount' (empty). At the bottom of the form, there are buttons for 'Accepted' (green), 'Rejected' (red), and 'Answer Pending' (grey).

6. Once you're done, click Save & Submit.

Hire a Candidate

With the OHC role of Hiring Manager or HR Liaison, you can hire a candidate.

Steps to Hire a Candidate

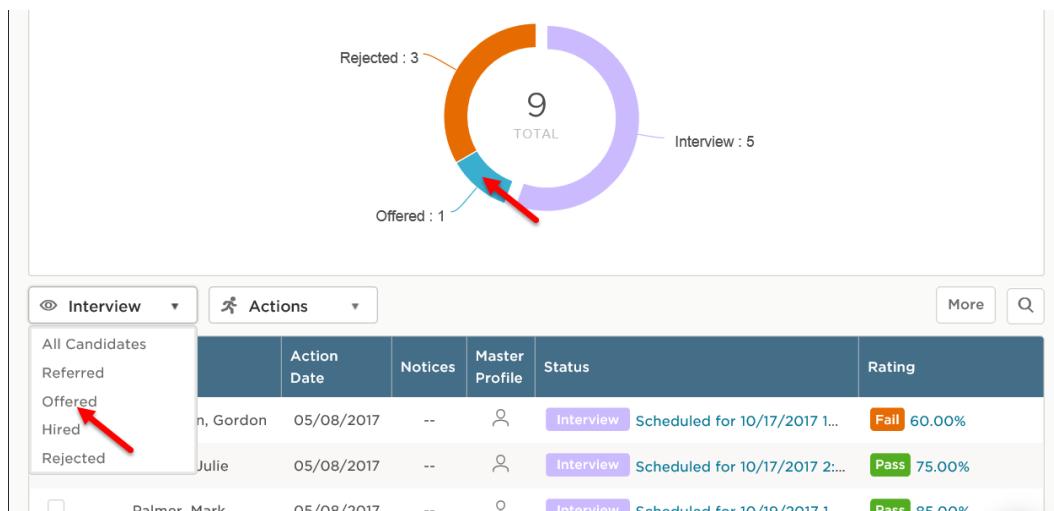
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.



Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items  

2. On the doughnut chart or on the Candidates menu, click the offered step.



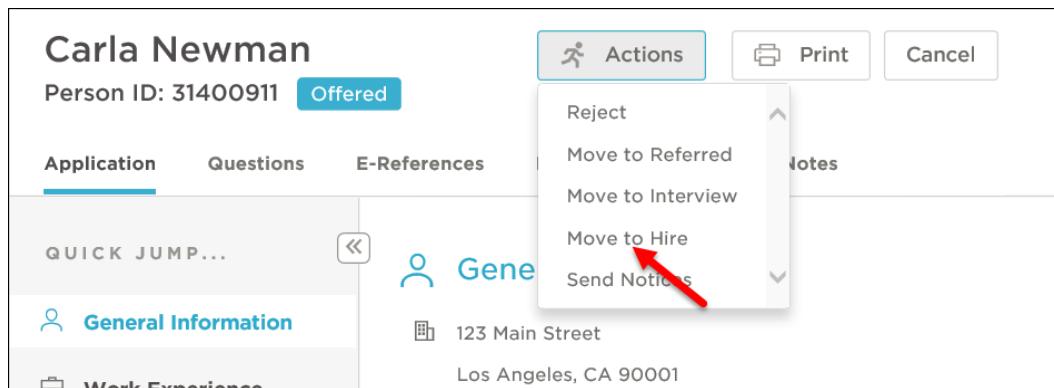
3. Click the name the candidate to hire.



	Name	Action Date	Notices	Master Profile	Status
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		 Accepted

Items per page: 10   Showing 1 - 1 of 1 items

4. On the Actions menu, click Move to Hire.



5. Enter the start date and any additional details.

The 'Hire Form' page for Carla Newman (Person ID: 31400911) is displayed. The 'Hire Information' section is active. The form includes fields for Offer Date (10/24/2017), Date Offer Accepted (10/25/2017), Offer Amount (\$ 50000.00), Bonus Amount (\$), Start Date (11/01/2017), Orientation Date (11/01/2017), Filled Date (10/25/2017), and an Active On Eligible List? switch. A 'Comment' text area and a blue message icon are also present.

6. Once you're done, click Save & Continue to Next Step.

- If you have an approval workflow template, it will display on the second hire form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes will only be applied to this hire, not the saved approval workflow template.

Approval Workflow

i

The approval workflow below has been automatically applied to this requisition based on the Department/Division.

You have the option to override the workflow for this requisition

1

Budget

Approvers
Richard Gonzales , + 1 more

Status
🕒 Pending...

Comments

Edit
Delete

2

HR

Approvers
Simon Davies , + 1 more

Status
🕒 Pending...

Comments

Edit
Delete

3

County Ad...

Approvers
Maria Lee , + 1 more

Status
🕒 Pending...

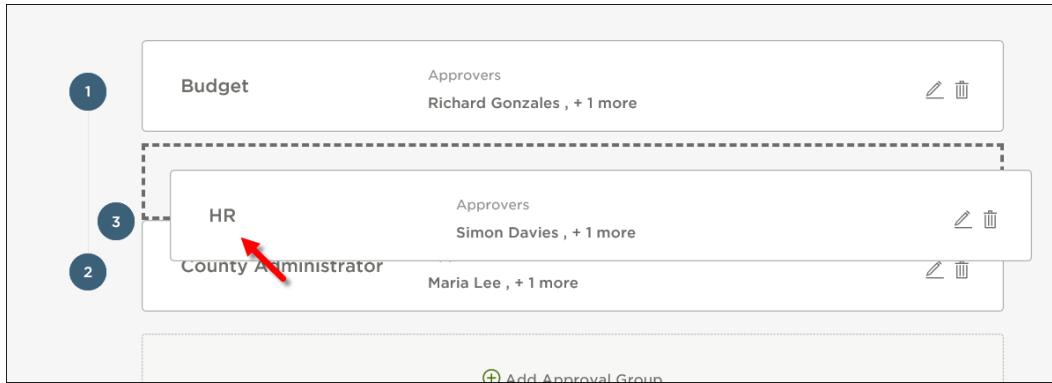
Comments

Edit
Delete

+ [Add Approval Group](#)

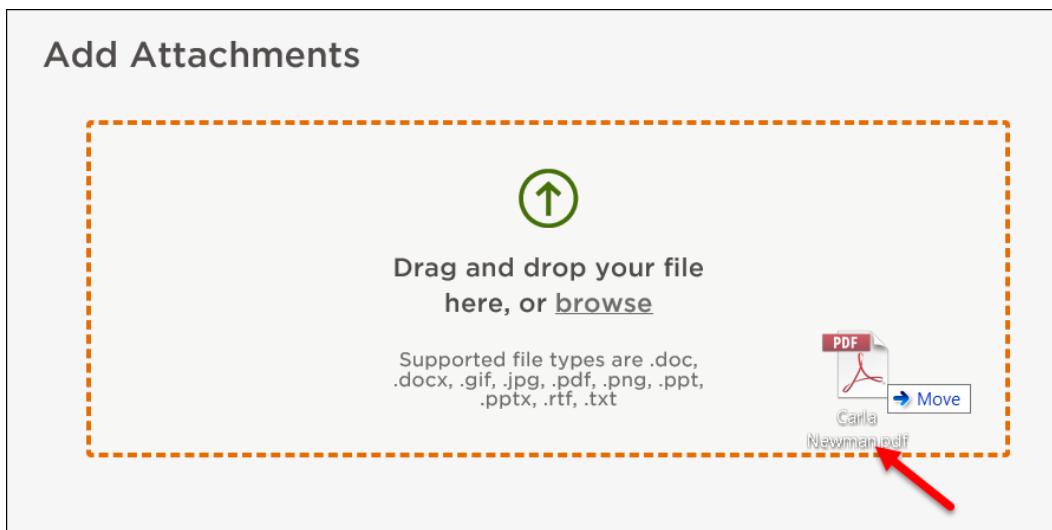
- If you have an approval workflow template, it will display on the second hire form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes will only be applied to this hire, not the saved approval workflow template.
- You will be prompted to create an approval workflow if a template for your department/division does not exist. You have two options: (1) Create an approval workflow. (2) Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.
- On the Approval Group pulldown, click the applicable approval group.
- From the Approvers field, click , select the applicable approvers, and then click Done.
- Click Add Approval Step.
- Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.

13. Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop operation.



14. Once you're done, click Save & Continue to Next Step.

15. Drag any file attachments to the third hire form page and click Save & Submit.



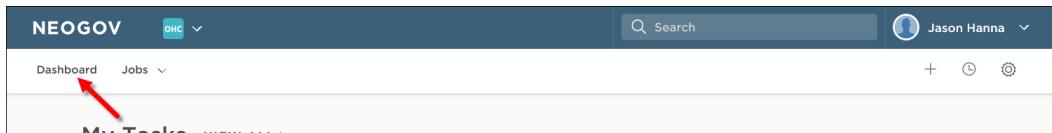
Note: If you're not quite ready to submit the hire, click Save & Close. The hire will display in your referred list with a pending release status. Once you're ready to submit, edit the hire, make any updates and click Save & Submit.

Approve a Hire

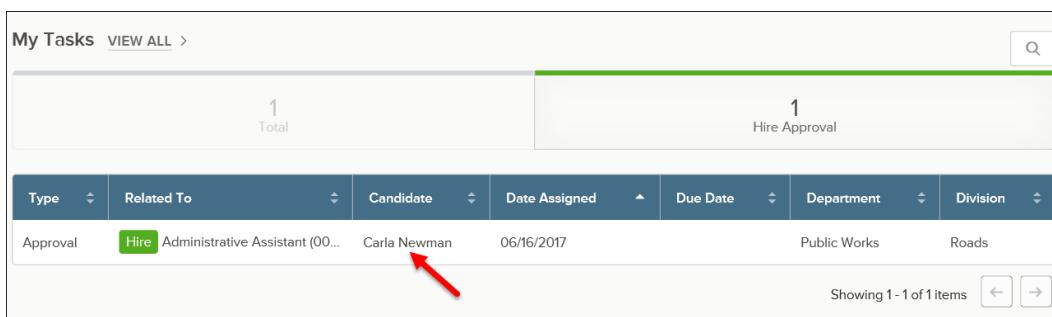
With the OHC role of Approver, you can review a hire sent to you for approval.

Steps to Approve a Hire

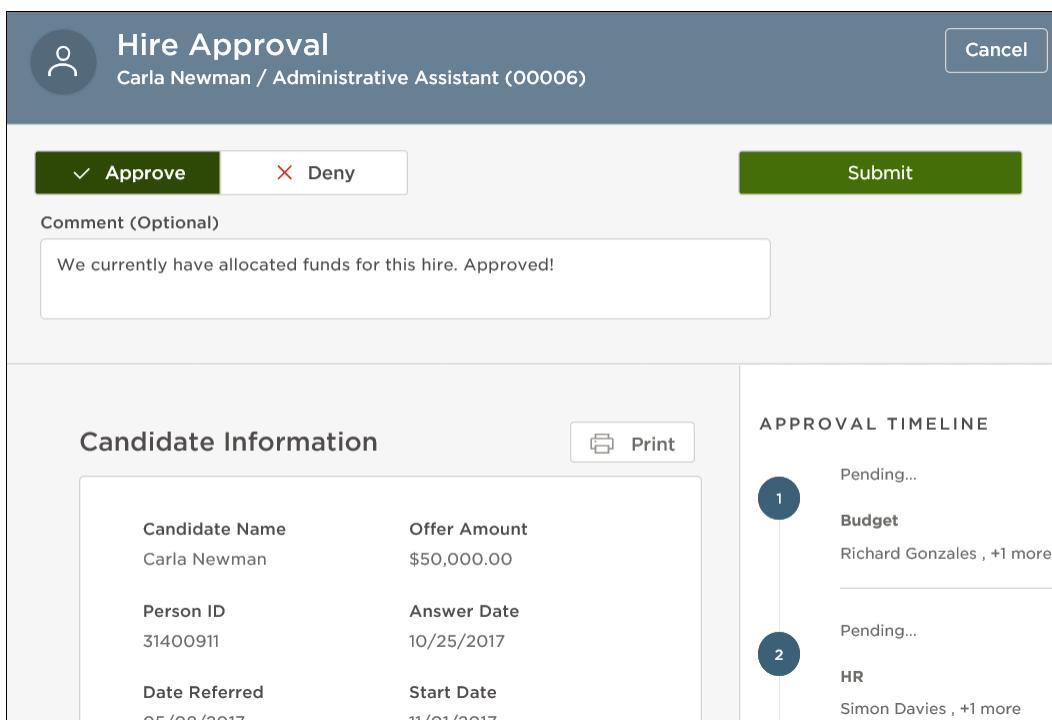
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. From the My Tasks section, click the hire pending your review.



3. Click Approve, type any comments and click Submit.



Hire Approval
Carla Newman / Administrative Assistant (00006)

Approve **Deny** **Cancel** **Submit**

Comment (Optional)
We currently have allocated funds for this hire. Approved!

Candidate Information	
Candidate Name	Offer Amount
Carla Newman	\$50,000.00
Person ID	Answer Date
31400911	10/25/2017
Date Referred	Start Date
05/09/2017	11/01/2017

APPROVAL TIMELINE

- 1 Pending...
Budget
Richard Gonzales , +1 more
- 2 Pending...
HR
Simon Davies , +1 more

4. If you're testing the approval workflow process, you may be an approver for multiple approval groups. In this case, repeat these steps until the hire has been approved by all groups and sent to HR.

Note: Approvers have the option of denying a hire. If this is done, the hire record can be sent back to any one of the previous approval groups, or all the way back to the hiring manager. Depending on the circumstances of the denial (e.g., additional justification), the hire approval process can be restarted.

Hire Approval
Carla Newman / Administrative Assistant (00006)

Cancel

✓ Approve X Deny Submit

Send Back to Step
HiringManager - ▾

Comment (Optional)
The County Administrator's Office requires a position justification report for this new hire. Thank you in advance for providing this report.

Candidate Information

Print

Candidate Name Carla Newman	Offer Amount \$50,000.00
--------------------------------	-----------------------------

APPROVAL TIMELINE

05/08/2017 by Richard Gonzales

Budget

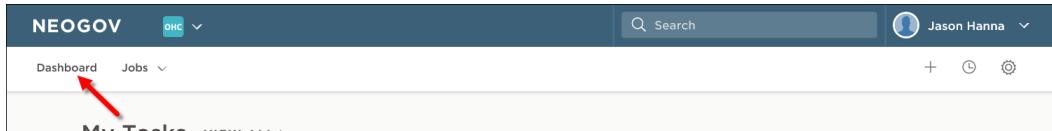
Richard Gonzales +1 more

Print Applications

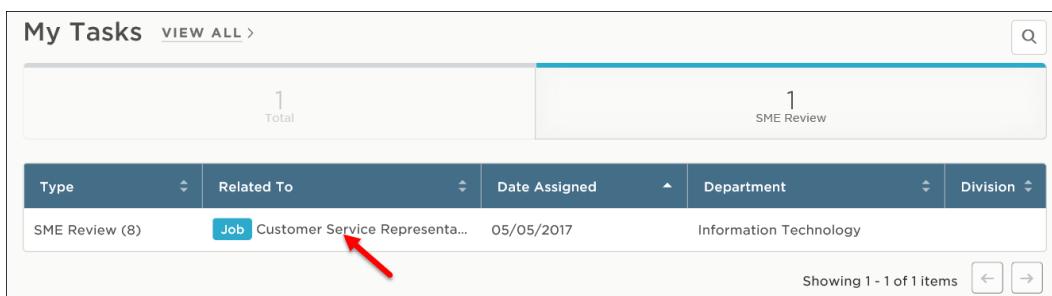
With the OHC role of SME, Rater, Hiring Manager, or HR Liaison, you can print applications.

Steps to Print Applications

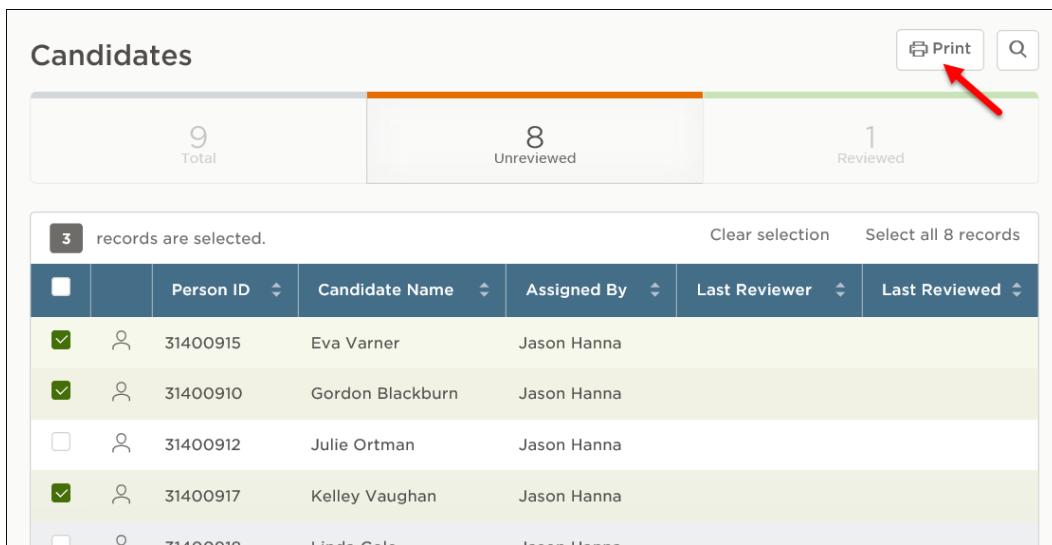
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. If you're assigned the OHC role of SME or Rater, go to the listing of candidates.



3. Select the candidates for which you need printed applications and click Print.



4. Alternatively, if you're assigned the OHC role of Hiring Manager or HR Liaison, go to the referred list of candidates.

My Candidates							
Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On	
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017	
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017	
Showing 1 - 2 of 2 items							

5. Select the candidates for which you need printed applications.

6. On the Actions menu, click Print Apps.

Referred		Actions				
5	records are selected	Reject Move to Skype Interview Move to On-Site Interview Move to Offered Move to Hire Send Notices Print Apps			Clear selection	Select all 9 records
		Action Date	Notices	Master Profile	Status	
		05/08/2017	--		Referred Active	
		05/08/2017	--		Referred Active	
		05/08/2017	--		Referred Active	
		05/08/2017	--		Referred Active	
		05/08/2017	--		Referred Active	
		05/08/2017	--		Referred Active	
		05/08/2017	--		Referred Active	
		05/08/2017	--		Referred Active	

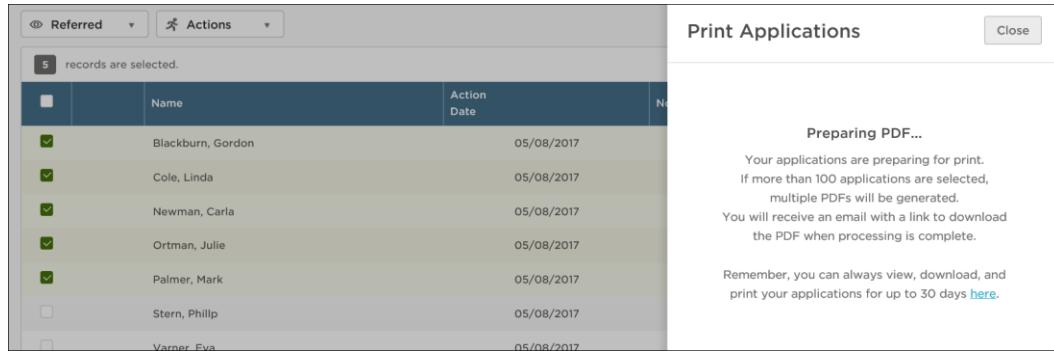
7. The Print Applications window will display. You have three options from which to choose:

- Print Applications Now: Limited to 25 applications and requires a direct print from your web browser.
- Create PDF with Applications: Creates a PDF of applications without candidates' uploaded attachments.
- Create PDF with Applications and Attachments: Creates a PDF of applications with candidate's uploaded attachments (e.g., résumés, cover letters, college transcripts).

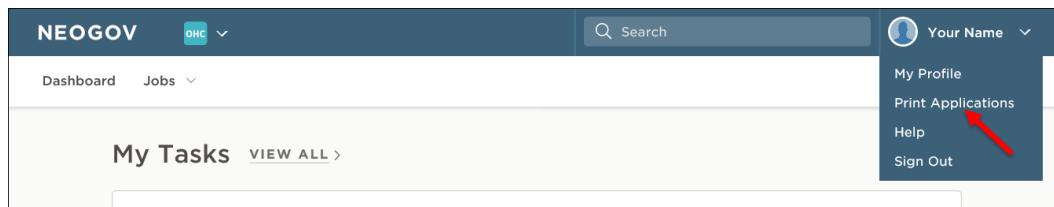
Select your preferred printing option and click Continue.

Referred			Print Apps		Print Applications																												
5	records are selected.				Print Applications	Cancel Continue																											
<table border="1"> <thead> <tr> <th></th> <th>Name</th> <th>Action Date</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Blackburn, Gordon</td> <td>05/08/2017</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Cole, Linda</td> <td>05/08/2017</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Newman, Carla</td> <td>05/08/2017</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Ortman, Julie</td> <td>05/08/2017</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Palmer, Mark</td> <td>05/08/2017</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Stern, Phillip</td> <td>05/08/2017</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Varner, Eva</td> <td>05/08/2017</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Vaughan, Kelley</td> <td>05/08/2017</td> </tr> </tbody> </table>				Name	Action Date	<input checked="" type="checkbox"/>	Blackburn, Gordon	05/08/2017	<input checked="" type="checkbox"/>	Cole, Linda	05/08/2017	<input checked="" type="checkbox"/>	Newman, Carla	05/08/2017	<input checked="" type="checkbox"/>	Ortman, Julie	05/08/2017	<input checked="" type="checkbox"/>	Palmer, Mark	05/08/2017	<input type="checkbox"/>	Stern, Phillip	05/08/2017	<input type="checkbox"/>	Varner, Eva	05/08/2017	<input type="checkbox"/>	Vaughan, Kelley	05/08/2017	<div> <p>You've selected 5 applications to print.</p> <p>Print Options</p> <p><input type="radio"/> Print Applications Now Limited to a maximum of 25 applications. Preview and print applications directly from your browser.</p> <p><input type="radio"/> Create PDF with Applications A PDF will be generated and you will be notified via email when it is ready to download.</p> <p><input checked="" type="radio"/> Create PDF with Applications and Attachments A PDF will be generated and you will be notified via email when it is ready to download.</p> </div>			
	Name	Action Date																															
<input checked="" type="checkbox"/>	Blackburn, Gordon	05/08/2017																															
<input checked="" type="checkbox"/>	Cole, Linda	05/08/2017																															
<input checked="" type="checkbox"/>	Newman, Carla	05/08/2017																															
<input checked="" type="checkbox"/>	Ortman, Julie	05/08/2017																															
<input checked="" type="checkbox"/>	Palmer, Mark	05/08/2017																															
<input type="checkbox"/>	Stern, Phillip	05/08/2017																															
<input type="checkbox"/>	Varner, Eva	05/08/2017																															
<input type="checkbox"/>	Vaughan, Kelley	05/08/2017																															

8. If you selected either PDF download option, a confirmation window will display. You'll receive an email from support@neogov.com once your PDF is ready for download.



9. Go to your saved PDF. On the Profile menu, click Print Applications.



10. From the PDF column, click View for the saved PDF you want to download and/or print.

