



NEOGOV

Insight Training Guide



Table of Contents

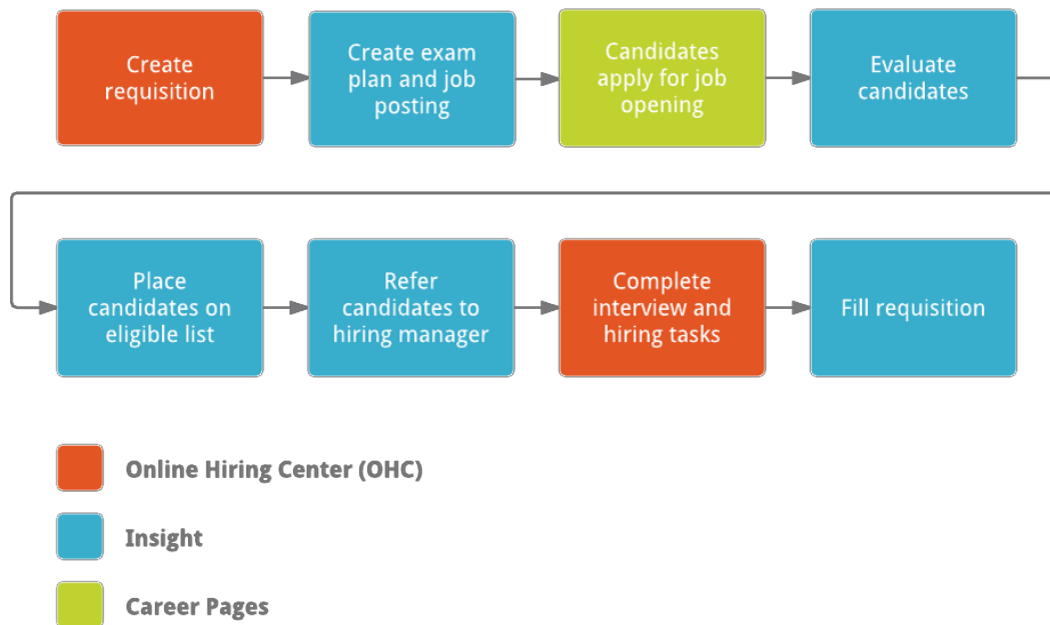
| | |
|---|----|
| Introduction | 3 |
| Recruitment Life Cycle Overview | 4 |
| Recruitment Life Cycle Role and Responsibility Chart | 5 |
| Universal Login..... | 6 |
| Module 1: Create a Requisition | 7 |
| Steps to Create a Requisition | 8 |
| Create an Approval Workflow | 11 |
| Requisition Approval Workflow Example | 13 |
| Steps to Approve a Requisition..... | 14 |
| Module 2: Authorize a Requisition and Create an Exam Plan | 16 |
| Steps to Authorize a Requisition | 16 |
| What is an exam plan? | 19 |
| Sections of the Exam Plan..... | 20 |
| Steps to Create an Exam Plan | 21 |
| Create an Evaluation Step (Optional)..... | 23 |
| Steps to Create an Evaluation Step..... | 23 |
| Module 3: Create a Job Posting | 28 |
| Steps to Create a Job Posting | 28 |
| Create Job-Specific Supplemental Questions..... | 34 |
| Steps to Create Job-Specific Supplemental Questions..... | 34 |
| Steps for Publishing the Job Posting on the Web..... | 41 |
| Module 4: Enter a Paper Application..... | 42 |
| Steps to Enter a Paper Application..... | 42 |
| Module 5: Evaluate Candidates and Send Notices | 44 |
| Steps to Evaluate Candidates Manually | 44 |
| Steps to Send Notices..... | 47 |
| Module 6: Refer Candidates to the Hiring Manager..... | 48 |
| Steps to Place Candidates on an Eligible List..... | 48 |
| Create a Referred List..... | 49 |
| Steps to Create a Referred List..... | 49 |
| Module 7: Complete Interview and Hiring Tasks in the OHC | 52 |

| | |
|--|----|
| Steps to Schedule Interviews | 52 |
| Steps to Reject a Single Candidate in the OHC..... | 55 |
| Steps to Reject Candidates in Bulk in the OHC..... | 57 |
| Send Rejection Notices in Bulk in the OHC | 59 |
| Steps to Send Rejection Notices in Bulk in the OHC..... | 59 |
| Steps to Make an Offer..... | 60 |
| Steps to Hire a Candidate..... | 62 |
| Create an Approval Workflow | 65 |
| Steps to Approve a Hire..... | 66 |
| Module 8: Authorize a New Hire and Fill a Requisition — Insight..... | 68 |
| Steps to Authorize a New Hire and Fill a Requisition | 68 |
| Print Applications..... | 72 |
| Steps to Print Applications | 72 |
| Advanced Filtering | 74 |
| Evaluation Step Filters..... | 75 |
| Create and Apply an Evaluation Step Filter | 75 |
| Create an Evaluation Step Filter from the Exam Plan..... | 75 |
| Create an Evaluation Step from the View Applicants by Step Page | 78 |
| Eligible List Filters | 81 |
| Create an Eligible List Filter from the Eligible Candidates Page | 81 |
| Create an Eligible List Filter from the Exam Plan Detail Page..... | 84 |

Training Module Guide

Introduction

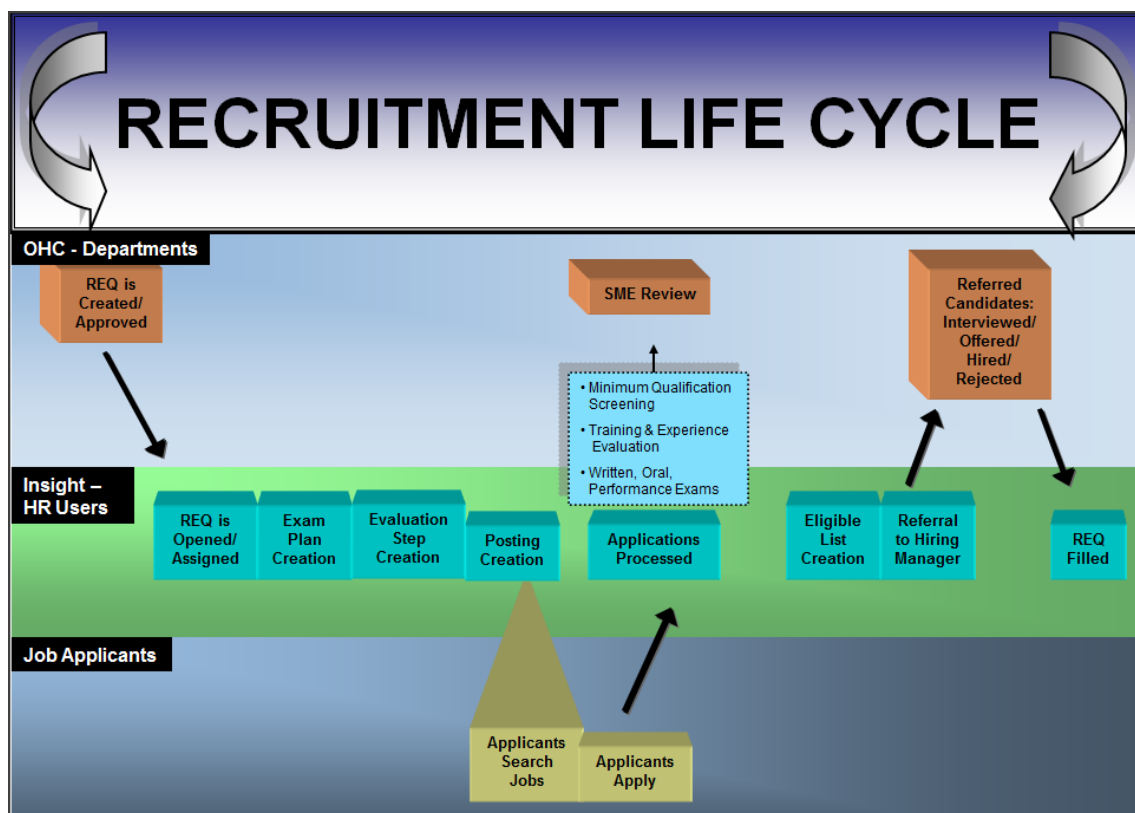
Welcome to new user training for Insight! This guide walks you through the training modules, step by step, from opening a requisition to hiring the ideal candidate. The chart below depicts the hiring process within the Neogov/Insight system.



Recruitment Life Cycle Overview

Insight is designed to automate the entire hiring process. It brings together the hiring departments through the Online Hiring Center (OHC), the Human Resources office through Insight and job applicants by career pages.

Some agencies' human resources offices handle the entire recruitment process, while others grant their hiring managers access to the online hiring center. Please consult with your agency's human resources office to determine who is responsible for which steps in the recruitment process.



Recruitment Life Cycle Role and Responsibility Chart

| Step in Recruitment Cycle | Role | System Access |
|--|-----------------------------|--|
| Requisitions – Open New | Liaison or Originator | Online Hiring Center – Department Users |
| Requisitions – Approvals | Approver | Online Hiring Center – Department Users |
| Requisitions Status Open / Assign Analyst | HR User | Insight – Human Resources |
| Exam Plan Creation | HR User | Insight – Human Resources |
| Evaluation Step Creation | HR User | Insight – Human Resources |
| Job Posting Creation | HR User | Insight – Human Resources |
| Applicant – Search for Jobs | Applicant | Insight – Human Resources |
| Applicant – Apply | Applicant | Specific Agency Web page |
| Application Process Minimum Qualification Screening Training and Experience Evaluation Written, Oral, Performance Exam step types | HR User | Insight – Human Resources |
| SME Review – any step | SME | Online Hiring Center – Department Users |
| Applicants – Add to Eligible List | HR User | Insight – Human Resources |
| Applicants – Refer to Hiring Manager | HR User | Insight – Human Resources |
| Referred Candidates: Schedule Interview / Make Offer / Hire / Reject | Hiring Manager / Liaison | Online Hiring Center – Department Users |
| Requisitions – Filled | HR User | Insight – Human Resources |
| Job Posting – Archived | HR User | Insight – Human Resources |
| Exam Plan – Archived | HR User | Insight – Human Resources |
| Referred List – Archived | HR User | Insight – Human Resources |

Universal Login

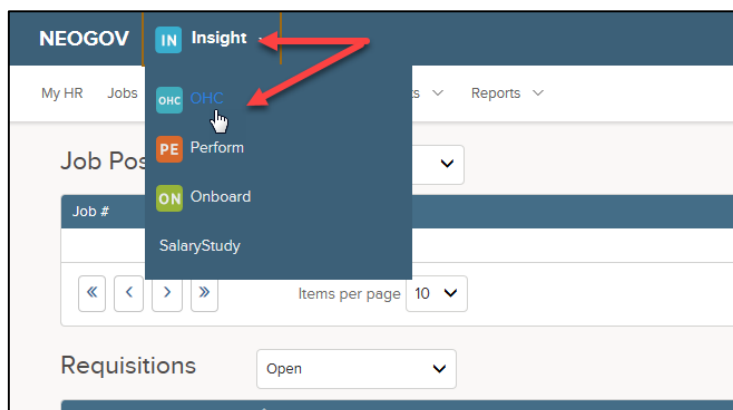
Users with multiple responsibilities that include **Insight (IN)** and **Online Hiring Center (OHC)** may be configured with both login permissions. You may seamlessly switch between **Insight (IN)** and the **Online Hiring Center (OHC)**.

Access: <https://secure.neogov.com>

1. Enter with your **Username** and **Password**. If you have an Insight user account, you will be directly logged in to Insight. If you only have an OHC user account, you will be directly logged in to the OHC.
2. Click **Log In**.



3. Look for the NEOGOV logo in the upper left corner of the **My HR** page. Navigate to the OHC to begin the process of creating a requisition for the vacancy.



Module 1: Create a Requisition

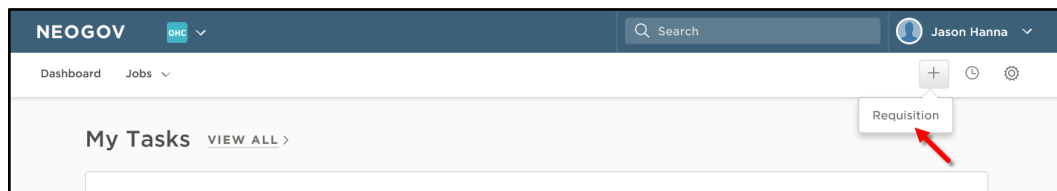
When a hiring department has a position vacancy, they will create a requisition from the OHC. An OHC user assigned the role of Originator or HR Liaison will have the ability to create requisitions for their assigned department(s).

Note: Insight users given permission to add requisitions may do so on behalf of the hiring department. From **Insight**, select the **Jobs** menu, then click on **Requisitions** and click the **Add New button [+]**.

Below are two navigation paths to start the process of creating a requisition. Use whichever path you prefer.

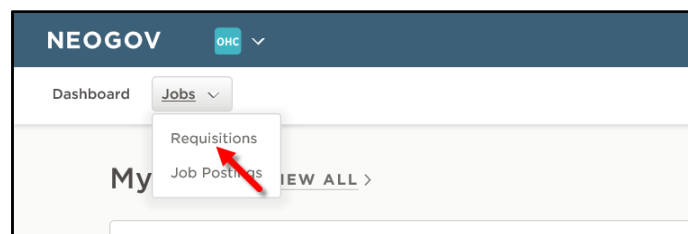
Navigation Path 1

In the OHC, on the **Add New menu [+]**, click **Requisition**. This can be done from any page.

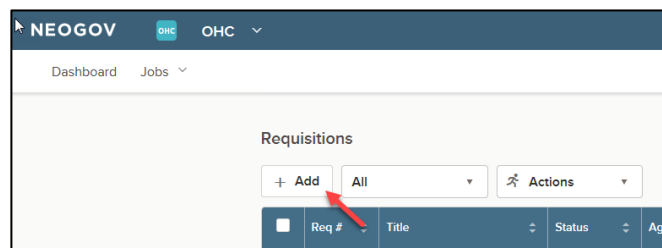


Navigation Path 2

In the OHC, 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 # [Assigned when requisition is saved] | Department/Division * Information Technology |
| Class Spec * ⓘ IT Project Manager (1152) | Working Title IT Project Manager |
| Desired Start Date 03/01/2018 | Hiring Manager * Jason Hanna Find a hiring manager |
| Job Type Full Time | List Type Regular |
| Number of Vacancies 1 | |

Position Details

New Position?
 Yes No

| | |
|-------------------------------|-----------------------------------|
| Position # * 000361 | Vacancy Date 03/01/2018 |
|-------------------------------|-----------------------------------|

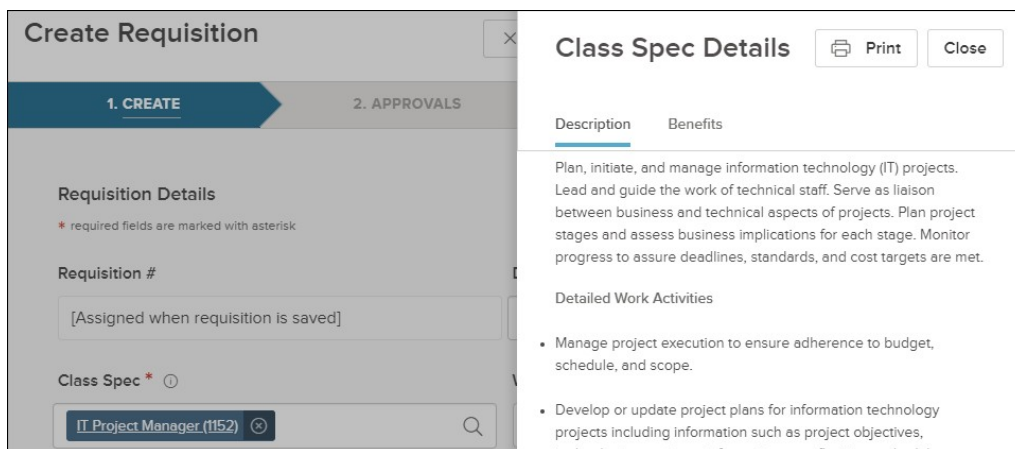
Delete

2. Complete the requisition form using the table below.

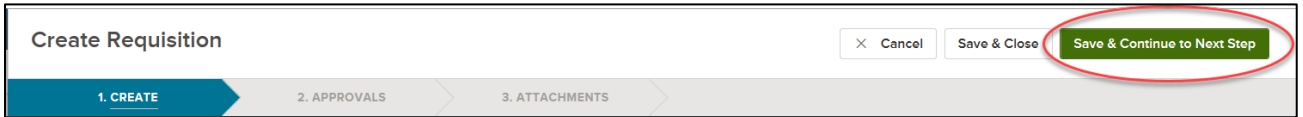
| Field | What to Enter |
|---------------------|---|
| * Requisition # | Since auto-numbering is enabled for this field, nothing is required; a number will be automatically assigned once you create the requisition. |
| * Agency/Division | Select the agency/division. |
| * Class Spec | Select the class specification. |
| Working Title | Enter the working title for this job. This can be the same name as the class title. |
| Desired Start Date | Enter the desired start date of the hired candidate, if available. |
| * Hiring Manager | Select your name and any others who will be using the system to view applications, send notices to candidates, view or take action on referred lists as a hiring manager. |
| Job Type | Select the proper job type. |
| List Type | Select Regular. |
| Number of Vacancies | Enter the number of vacancies. |
| New Position? | If this is a new position, select "Yes." If this is an existing position (i.e., replacement of staff), select "No." |
| Position Detail | Click Add Position Detail and enter information about the position including the position number, vacancy date, and if applicable, the first and last names of the incumbent replaced. Repeat this step if you have more than one vacancy. |
| Comment | Enter any additional information about the job in this field. |

* Required

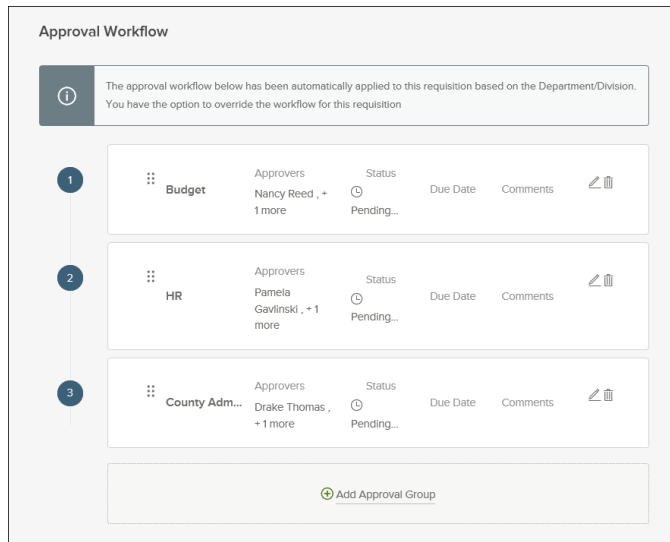
Note: To check the **ClassSpec** field, click the selected job title to have a closer look. If you'd prefer printing the class spec, simply click **Print**. After your review, click **Close**.




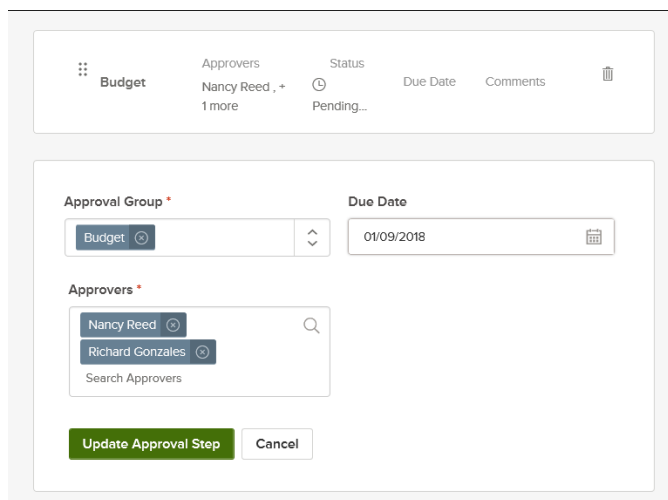
- Once you've completed and reviewed the Requisition form, click the **Save & Continue to Next Step** button in the top right corner of the screen. The Approval Workflow page will display.



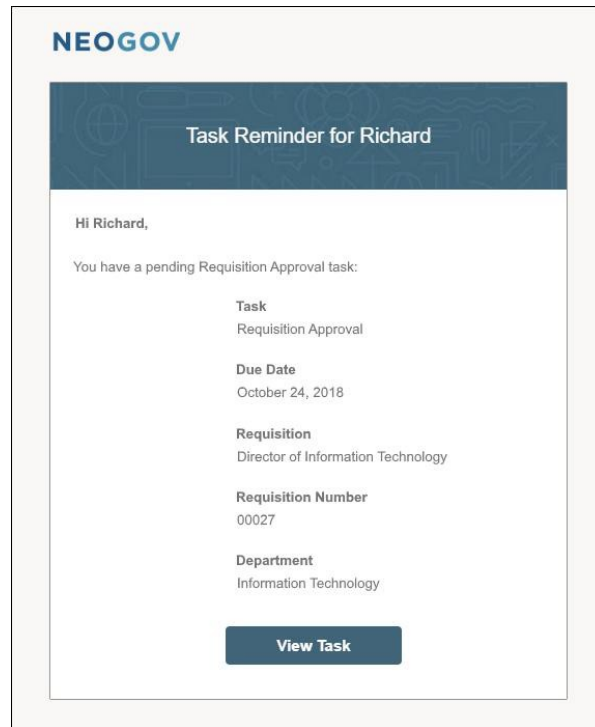
- If you have an approval workflow template, it will display on the second requisition form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes made will only be applied to this requisition, not the saved approval workflow template.



- To keep the assigned approver(s) reminded about their approval task with a due date, click , enter a due date, and then click **Update Approval Step**.




Note: Repeat these steps for all remaining approval steps that require due dates. The assigned approver(s) will receive a reminder email from info@neogov.com, with the subject line, NEOGOV OHC Task Reminder, on the due date and each day the approval task is past due, until the task is completed. In the contents of the reminder email will be a **View Task** button, guiding the approver(s) to the task requiring their attention.



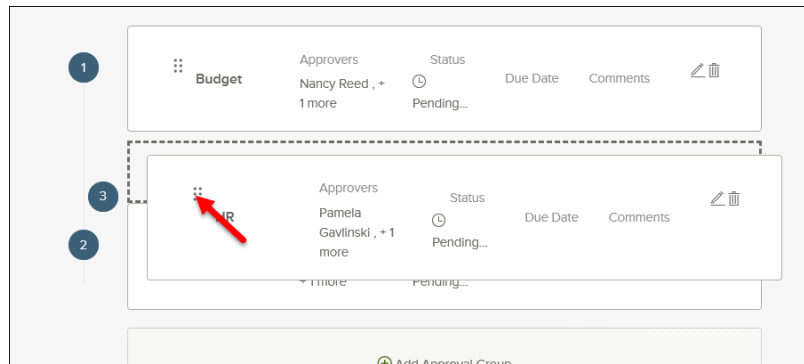
6. If a template for your agency/division does not exist, you will be prompted to create an approval workflow. You have two options: (1) Create an approval workflow or (2) Skip the approval workflow and click **Save & Continue to Next Step**. To create an approval workflow, follow the steps listed in the **Create an Approval Workflow** section below. Otherwise, click **Save & Continue to Next Step**.

Create an Approval Workflow

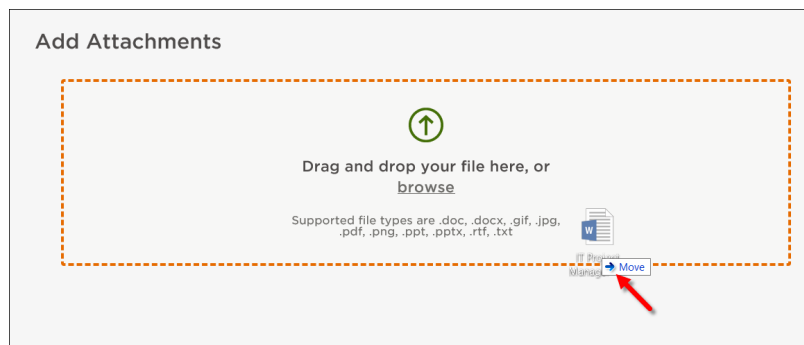
- a. Click the **+Add Approval Group** link.
- b. On the **Approval Group** pulldown, click the applicable approval group.
- c. Enter a Due Date in the **Due Date** field (optional).
- d. From the **Approvers** field, click , select the applicable approver(s).
- e. Click **Add Approval Step**.
- f. Click **+Add Approval Group and** repeat these steps for the remaining approval steps.



If your approval steps are not in the proper order, you can easily correct the order by dragging and dropping them in the desired order.



7. Click **Save & Continue to Next Step** when all changes have been made.
8. Drag any file attachments to the third requisition form page and click **Save & Submit**.



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.

Requisition Approval Workflow Example

You may need to route the requisition through a series of approval groups, depending upon your agency's use of the system. This can be achieved by defining an approval workflow.

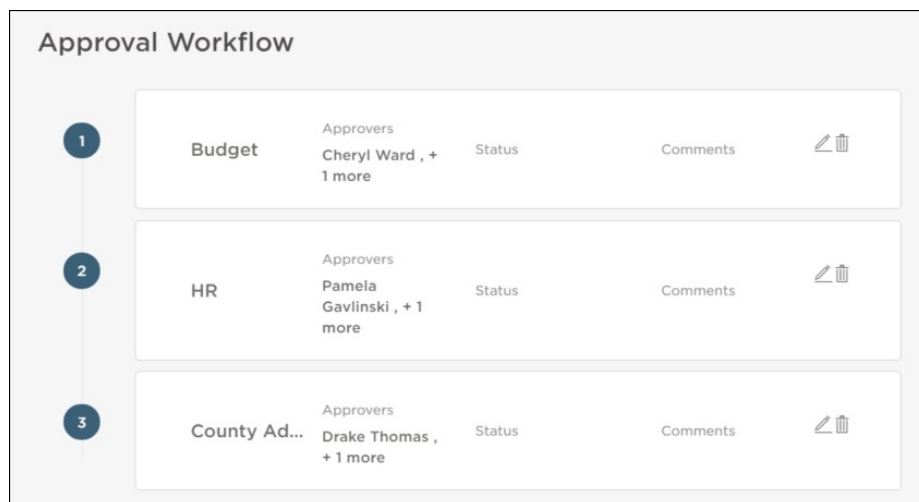
In the example illustrated below, the defined approval workflow requires the requisition to go through a total of three approval groups. Once the requisition creator submits the record, it will go to the first approval group. In this example, both Cheryl Ward and Richard Gonzales will be notified, via email, that a requisition requires their action. Approval is on a first come, first approve basis. Either Cheryl or Richard will need to approve the requisition to move it on to the next approval group.

Approval Workflow

Approval Group
Budget

Approvers *
Cheryl Ward
Richard Gonzales Search Approvers

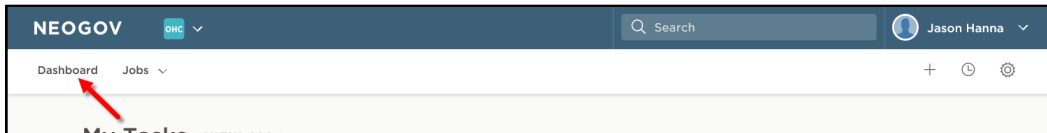
Add Approval Step Cancel



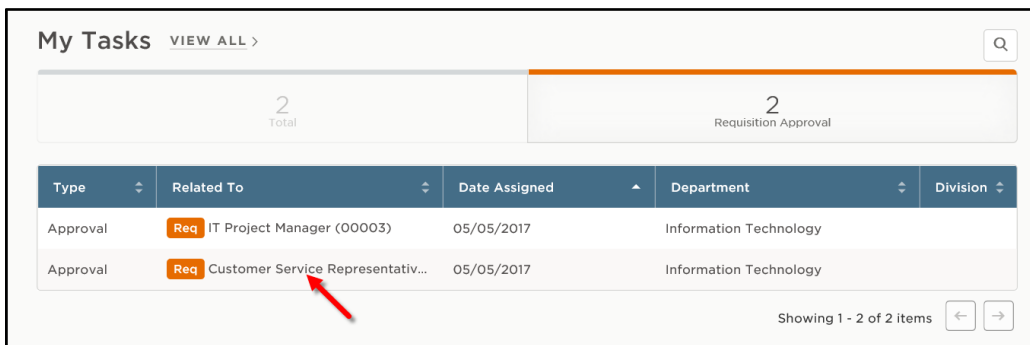
The system is configured to allow up to 10 levels.

Steps to Approve a Requisition

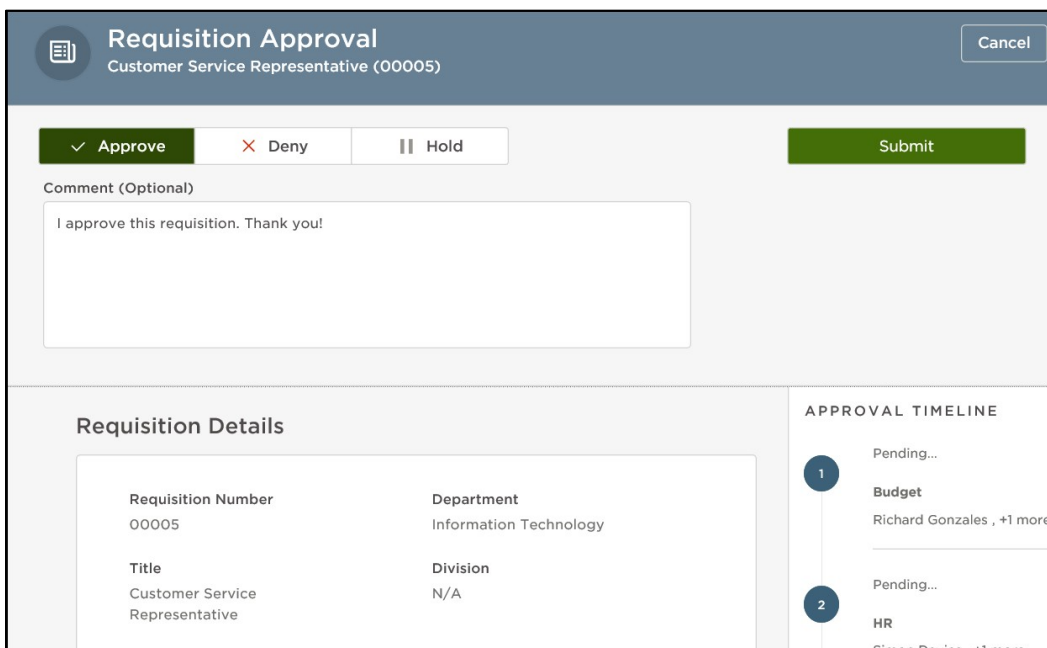
1. Click **Dashboard** from the upper left corner.



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



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



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.

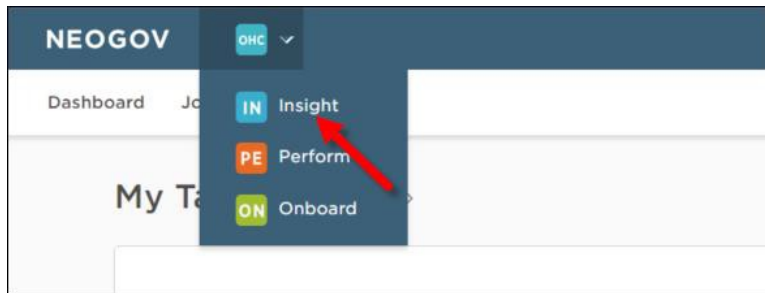
The screenshot displays the 'Requisition Approval' interface for 'IT Project Manager (00003)'. At the top right is a 'Cancel' button. Below the header are three action buttons: 'Approve' (green checkmark), 'Deny' (red X), and 'Hold' (grey pause), followed by a large green 'Submit' button. A 'Send Back to Step' dropdown menu is set to 'Originator - Hanna Jason'. A 'Comment (Optional)' text area contains the text: '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.' The bottom section is split into 'Requisition Details' (with fields for Requisition Number and Department) and 'APPROVAL TIMELINE' (showing a green checkmark for '05/05/2017 by Cheryl Ward' and a 'Budget' field with the value 'Richard Gonzalez - 11 more').

If a requisition requires canceling, it must be canceled by the original creator or someone with the role of HR Liaison. Additionally, if a requisition has been approved, it can be canceled by an HR staff member with Insight access.

Module 2: Authorize a Requisition and Create an Exam Plan

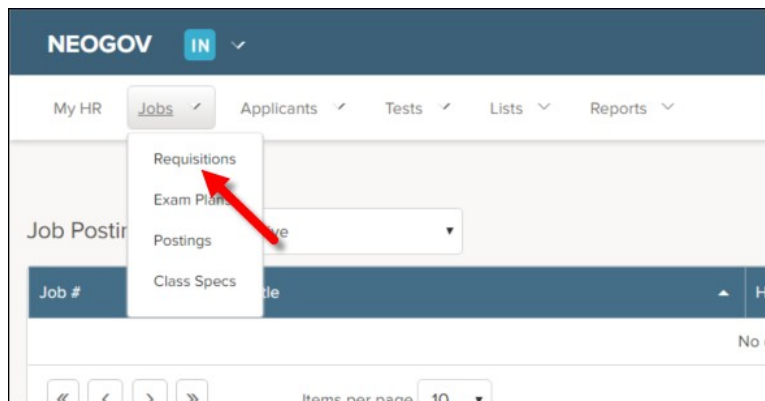
Once the requisition has been created and approved (if required) in the OHC, the requisition is routed to the HR side of the system, Insight.

To switch to the Insight user role and assume the role of HR, click **Insight** on the **NEOGOV Product menu**.

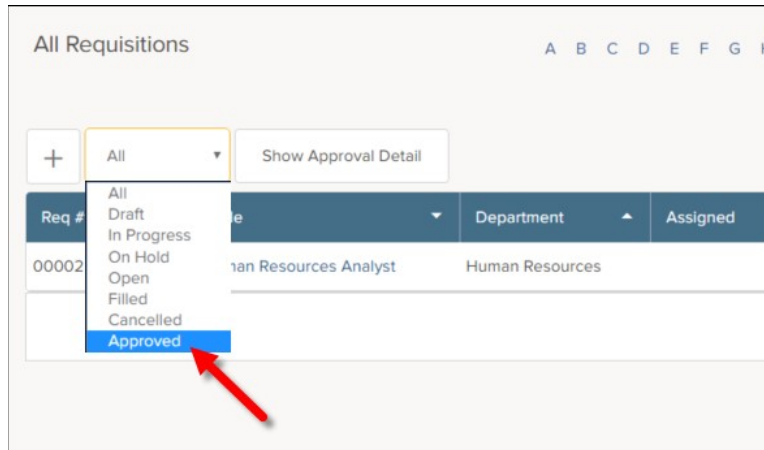



Steps to Authorize a Requisition

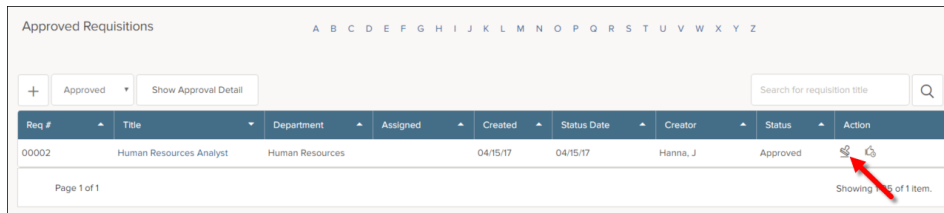
1. Insight users are configured to receive requisition notification emails about new requisitions. A notification serves as a prompt to view a new requisition. To access the requisition, from **Insight**, on the **Jobs** menu, click **Requisitions**.



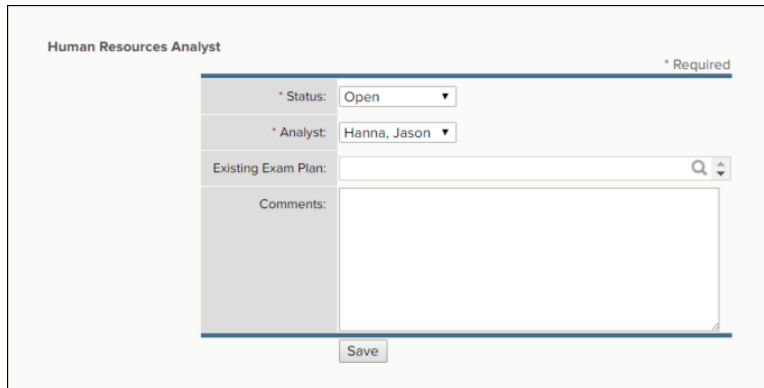
- The default view displays all requisitions. This listing will grow over time, so using the Status pulldown will help quickly find requisitions. New requisitions that have been routed to HR to start the recruitment process will have the **Status** field set to **Approved**. On the **Status** pulldown, click **Approved**.



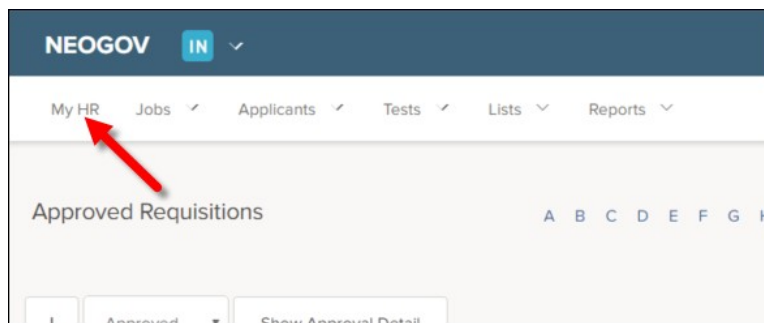
- Locate your recently-created requisition. From the **Action** column, click the **Authorize** icon (). It looks like a rubber stamp.



- On the **Status** pulldown, change the selection from Approved to **Open**. On the **Analyst** pulldown, **select your name**. Leave the **Existing Exam Plan** field blank as you will be creating a new exam plan later. This field is only used if you're retrofitting a requisition to a previously-created exam plan, or if a requisition is created for the same job where a current list of eligible candidates can be referred to the hiring department without the need of starting a new recruitment.



- Click **Save** and then click **My HR** to return to your Insight dashboard to begin the process of creating the exam plan.



Note: The requisition displays from your **My HR** page, **Requisitions** section, as you are now the assigned analyst. From the **Exam** column, a **Create Exam** link is available. Once the exam plan is created, this will be replaced with a number for quick access to the exam plan.

What is an exam plan?

An exam plan is a central hub for many recruitment processing activities. From the exam plan, you can track recruitment activities and view associated records. It may help to think of the exam plan as a recruitment folder where your recruitment work is stored. See the sections table on the following page for more details.

| Exam Title | | Human Resources Analyst | Department | | Human Resources |
|--|-------------------------|-------------------------|--------------|---|--|
| Exam Number | | 00002 | Division | | |
| | | | Vacancies | | 1 |
| Edit Exam Plan Audit Trail | | | | | |
| Job Posting Add New | | | | | |
| Job # | Job Title | Status | Last Updated | Assigned To | |
| 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 Print Apps | | | | | |
| Step | Evaluation Step | Weight | Results | At Step | Action |
| Advanced Filters Add Evaluation Step Filter Add Eligible List Filter | | | | | |
| Title | Created By | Filter Type | | Action | |
| Eligible Lists Add New Show Archived Eligible Lists | | | | | |
| List Name | List Type | Expiration Date | # On List | | Action |
| Default List | Regular | N/A | Total | Active | Edit View Candidates Audit Trail |
| 0 | 0 | | | | |
| Requisitions Add New | | | | | |
| Req # | Title | Department | Date Created | Action | |
| 00002 | Human Resources Analyst | Human Resources | 04/15/2017 | Edit Authorize Disassociate Referrals | |
| Tasks Add New | | | | | |
| Subject | Status | Priority | Due Date | Assigned To | Action |
| Notes Add New | | | | | |
| Note Title | Note | Last Updated | Note Owner | Action | |
| Files Add New | | | | | |
| Attachment Title | Date Uploaded | File Name | Action | | |

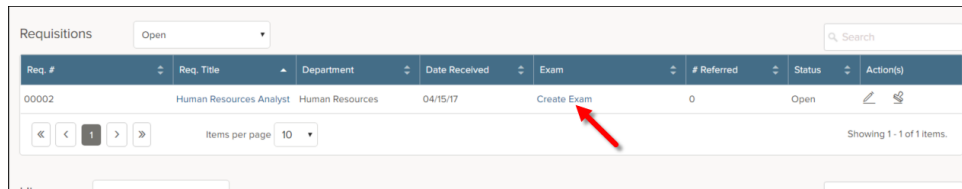
Sections of the Exam Plan

| Section | Description |
|------------------|--|
| Job Posting | Add a job posting from this section. Once the job posting has been added, you can view, edit, archive/unarchive and view the audit trail. |
| Recruiting Plan | Track advertising expenditures from this section. Once an advertising item has been added, you can edit, delete and view the audit trail. Your Insight Administrator will set up the most commonly used advertising methods, e.g., Newspaper ad, Radio ad, CareerBuilder. |
| Evaluation Steps | Add one or multiple selection hurdles for your candidates from this section. Once an evaluation step has been added, you can edit, delete and view the audit trail. Once candidates have applied, you can view submitted applications, print applications and view candidate results and flow reports. This is where you'll spend much of your application screening/scoring time. |
| Advanced Filters | Add evaluation and/or eligible list filters to find specific groups of candidates from this section. Filters can be based on various data points including master profile, standard application, <u>agency-wide</u> and job-specific supplemental questions and evaluation step results. Once a filter has been added, you can view, edit, delete and share. |
| Eligible Lists | Add subsequent eligible lists from this section. Upon creating the exam plan, Insight automatically creates an eligible list for you. This eligible list, named Default List, has a list type set to Regular. You can edit and view candidates and view audit trail for the default and/or subsequent eligible lists. Candidates must go through all evaluation steps <u>prior to</u> being placed on the regular eligible list. |
| Requisitions | View the associated requisition(s) from this section. Other actions include: add, edit, authorize, <u>disassociate</u> and view a resulting referred list. |
| Tasks | Add other Insight users' recruitment tasks from this section. Once a task has been added, you can edit and delete. The task system will send automated email notifications to assignees regarding assignments, due dates and status changes. |
| Notes | Add recruitment notes from this section. Once a note has been added, you can edit, delete and view the audit trail. |
| Files | Add (upload) files applicable to the recruitment from this section. Once a file has been uploaded, it can be downloaded or deleted. |

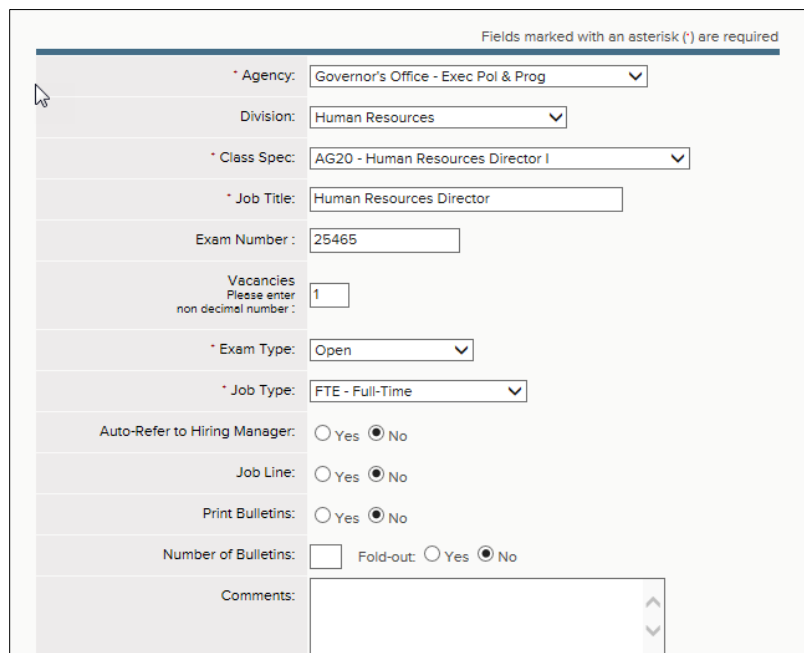
Steps to Create an Exam Plan

To create the exam plan, complete the following steps:

1. **My HR page, Requisitions section, under the Exam column, click **Create Exam**.**



2. The Exam Plan form will display.



The Exam Plan form contains the following fields and options:

- Agency: Governor's Office - Exec Pol & Prog (dropdown)
- Division: Human Resources (dropdown)
- Class Spec: AG20 - Human Resources Director I (dropdown)
- Job Title: Human Resources Director (text input)
- Exam Number: 25465 (text input)
- Vacancies: 1 (text input, with note: Please enter non decimal number)
- Exam Type: Open (dropdown)
- Job Type: FTE - Full-Time (dropdown)
- Auto-Refer to Hiring Manager: Yes No
- Job Line: Yes No
- Print Bulletins: Yes No
- Number of Bulletins: Fold-out: Yes No
- Comments: (text area)

Fields marked with an asterisk (*) are required.

3. Complete the form using the table below.

* Required

| Field | What to Enter |
|------------------------------|--|
| * Agency | Pre-populates with the Agency specified in the requisition. |
| * Division | Pre-populates with the Division specified in the requisition. |
| * Class Spec | Pre-populates with the class specification specified in the requisition. |
| * Job Title | Pre-populates with the working job title specified in the requisition. |
| Exam Number | Pre-populates with the same number assigned to the requisition. |
| Vacancies | Pre-populates with the same number of vacancies designated in the requisition. |
| * Exam Type | Select "Open" from the pulldown. |
| * Job Type | Select the job type from the pulldown. |
| Auto-Refer to Hiring Manager | Leave the default value of "No" if you will be evaluating candidates using a series of evaluation steps or manually reviewing the candidates' applications before referring them to the hiring manager. Note: If set to "Yes," candidates will be immediately referred to the hiring manager(s) designated on the associated requisition. |
| Job <u>Line</u> | This field is for tracking purposes only. If your organization uses a job line (i.e., a telephone audio recording of open jobs), select whether or not this job is on the job line. |
| Print Bulletins | This field is for tracking purposes only. Select whether or not you're printing job bulletins. |
| Number of Bulletins | This field is for tracking purposes only. If you're printing job bulletins, you can track the number and whether or not they are fold-out. |
| Comments | Enter any additional information about the exam plan in this field. |

4. Click **Save**.

Create an Evaluation Step (Optional)

With the exam plan now in place, the system is configured to automatically create the first evaluation step, Step 1, Application Received. You can create additional evaluation steps. Think of evaluation steps as selection hurdles. Failing candidates will remain at the evaluation step; all passing candidates will advance to the subsequent step.

There are a variety of evaluation step types to choose including: supplemental questionnaire, training and experience, rating matrix, written exam, performance exam. If multiple evaluation steps are created, the applicant can see the current status message in the applicant's self-service portal.

To accurately capture the applicants meeting minimum training and experience requirements, agencies will need to consistently structure job postings in one of the following ways:

1. Add a "Supplemental Questionnaire" step type titled "Minimum Qualifications" in your exam plan and "Fail" those individuals who do not meet minimum qualifications;
2. Add a "Training and Experience" step type titled "Minimum Qualifications" in your exam plan and "Fail" those individuals who do not meet minimum qualifications; or
3. If the candidates on the Eligible List are all those who meet the minimum training and experience requirements for the job, agencies are not required to do either of the above steps, because the system will be able to identify the total number of candidates placed on Eligible Lists over a given period of time.

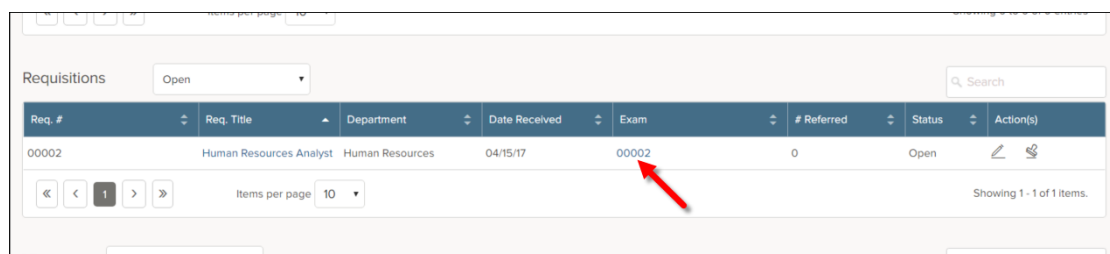
If agencies set up two "training and experience" step types, the system will be unable to differentiate which one is to be used for EEO reporting purposes. Therefore, to avoid duplication, agencies must choose either the "supplemental questionnaire" or the "training and experience" step type to capture those applicants who meet the minimum training and experience requirements.



Steps to Create an Evaluation Step

1. Access the exam plan by either:

Navigation Path 1

From **My HR** page, in the **Requisitions** section, click the **exam number**.



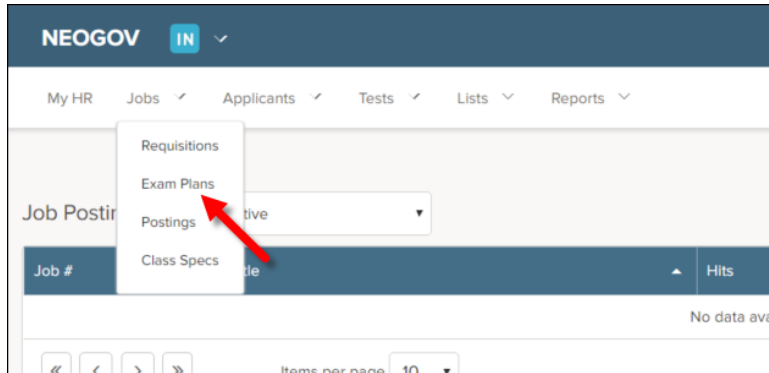
| Req. # | Req. Title | Department | Date Received | Exam | # Referred | Status | Action(s) |
|--------|-------------------------|-----------------|---------------|-------|------------|--------|---|
| 00002 | Human Resources Analyst | Human Resources | 04/15/17 | 00002 | 0 | Open |   |

Items per page: 10

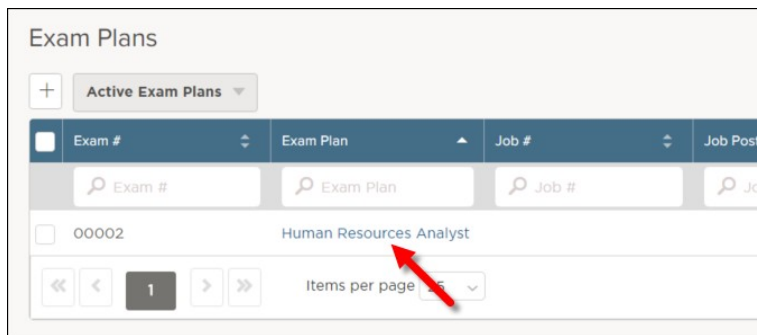
Showing 1 - 1 of 1 items.

Navigation Path 2

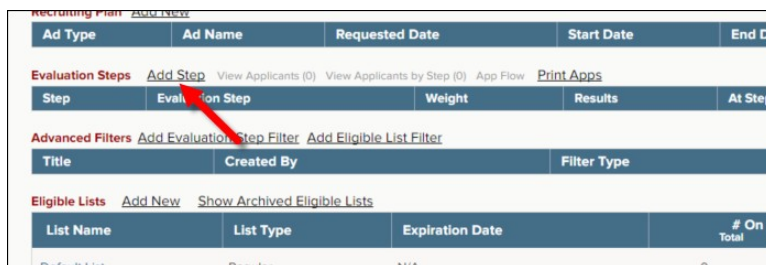
- a. On the **Jobs** menu, click **Exam Plans**.



- b. From the **Exam Plan** column, click the **job title**.



2. From the **Evaluation Steps** section, click **Add Step**.



3. The evaluation step form will display.

The screenshot shows a form titled "Definition" with the following fields and options:

- * Step Type:** Supplemental Questionnaire
- Step Name:** Minimum Qualifications Review
- Display Candidate Status As:** Initial Application Review
- * Evaluate On:** Pass/Fail, Scored
- Applicant Status:** Do Not Show This Step, Show This Step
 - Show Step Pass/Fail
 - Show Step Score
 - Show Step Disposition
- Comments:** (Empty text area)
- Cumulative Score:** Do Not Show Cumulative Score, Show Cumulative Score
- Prerequisite Steps:** Application Received, Minimum Qualifications Review

4. Complete the form using the table below.

* Required

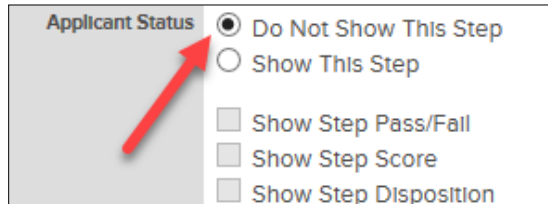
| Field | What to Enter |
|-----------------------------|---|
| * Step Type | Select the type from the dropdown menu. |
| Step Name | Enter a name for the evaluation step. |
| Display Candidate Status As | This message will display to candidates who sign back into the applicant portal to see their current application status. This status is to let applicants know where they are in the process (not their performance, as this same message is displayed to every applicant placed in the step). Leave the field blank to automatically display Application Received in the applicant’s self-service portal view. |
| * Evaluate On | Select Pass/Fail if this will be a pass/fail step or Scored if this will be a scored step. |
| Applicant Status | Indicate whether or not the Step Name will be shown. If so, indicate which information should be revealed to the applicant. Remember that the Display Candidate Status As status will always display to the candidate whether or not the step is shown under Applicant Status . |
| Comments | Enter any additional information about the evaluation step in this field. |
| Cumulative Score | Select Do Not Show Cumulative Score if you do not want to show the cumulative score or Show Cumulative Score if you want to show the cumulative score. If you select a pass/fail step, the cumulative score will not be applicable. |
| Prerequisite Steps | Indicate if there are any previous steps are prerequisites to this step. |

5. Once you’ve finished, click **Save**.



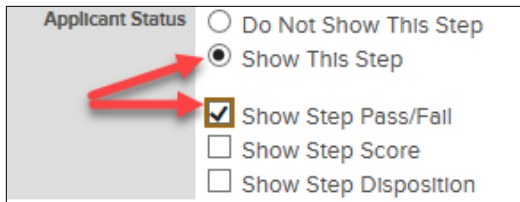
For more information on the options available when setting up an evaluation step, see below:

The view option always defaults to **Do Not Show This Step** on each step, forcing the Insight User to take action to **show** the status to the applicant.

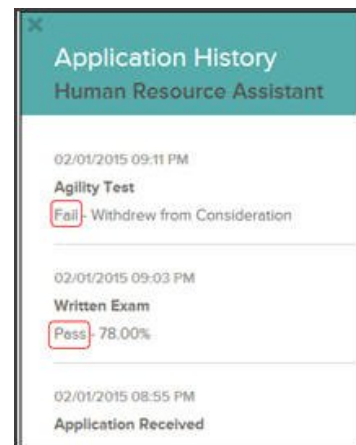


Selecting **Show This Step** adds this evaluation step to the **Applicant Status** view within the applicant's self-service portal.

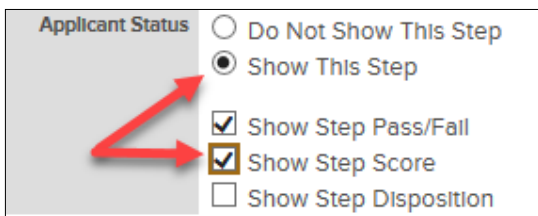
Selecting **Show Step Pass/Fail**:



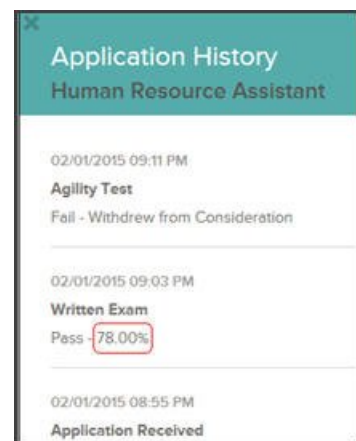
...adds Pass/Fail content to the applicant status window for the evaluation step.



Selecting **Show Step Score**:



...adds the applicant's score percentage to the applicant status window for the evaluation step.



Selecting **Show Step Disposition**:

| | |
|-------------------------|---|
| Applicant Status | <input type="radio"/> Do Not Show This Step |
| | <input checked="" type="radio"/> Show This Step |
| | <input checked="" type="checkbox"/> Show Step Pass/Fail |
| | <input checked="" type="checkbox"/> Show Step Disposition |

...adds rejected applicant's disposition (reject reason) to the applicant status window for the evaluation step.

Application History
Human Resource Assistant

02/01/2015 09:11 PM
Agility Test
Fail - Withdrawn from Consideration

02/01/2015 09:03 PM
Written Exam
Pass - 78.00%

02/01/2015 08:55 PM
Application Received

Module 3: Create a Job Posting

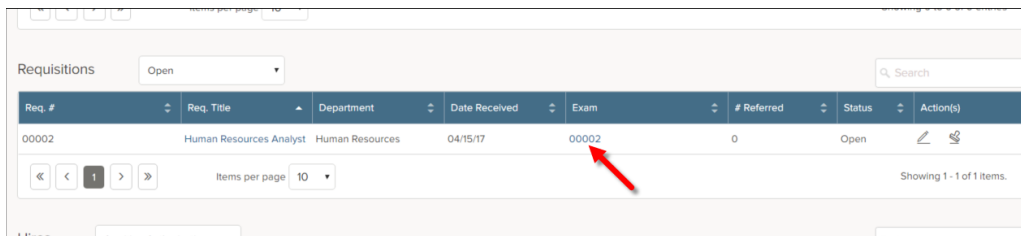
In the previous training module, you created an evaluation step. Now the exam plan is prepared to accept applications. For this training module, you will create a job posting to announce the job opening on the web.

Steps to Create a Job Posting

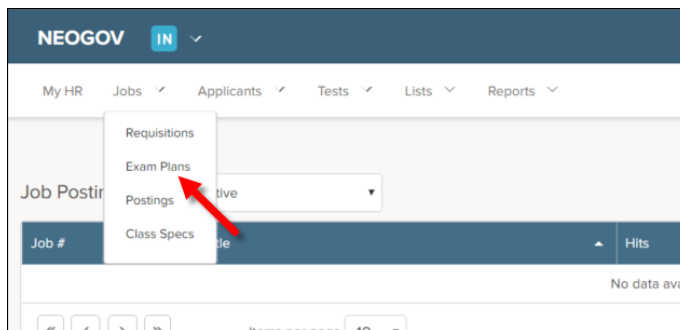
1. If you're not already viewing your exam plan, return to the exam plan.

Navigation Path 1

- a. From **My HR** page, in the **Requisitions** section, click the **exam number**.

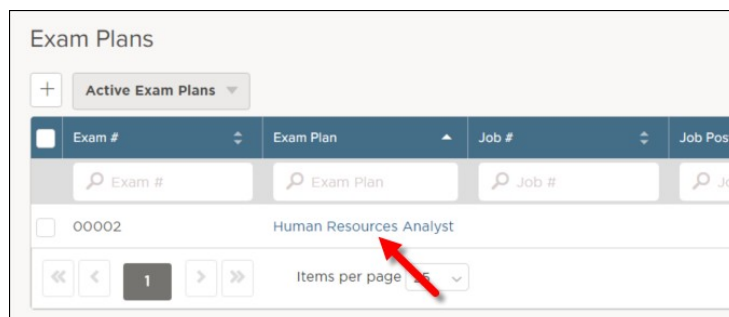


- b. On the **Jobs** menu, click **Exam Plans**.

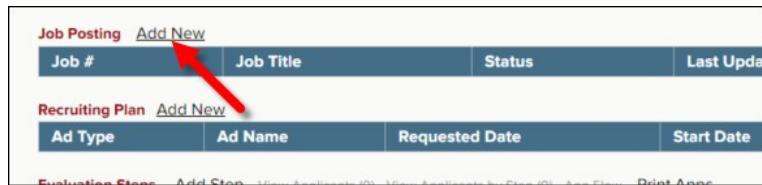


Navigation Path 2

- a. From the **Exam Plan** column, click the **job title**.



2. From the **Job Posting** section, click **Add New**.



3. The job posting form will display.

A screenshot of a 'Job Posting' form for 'Human Resources Analyst - 01'. The form includes several sections: 'Copy Job Posting', 'Copy Job Posting & Scoring Plan', 'Supplemental Questions', 'Item Bank', and 'Scoring Plan'. There are checkboxes for 'Draft', 'Archived', 'Accept Online Applications', 'Show Closing Date/Time', and 'Continuous'. The main form fields include: 'Exam Plan' (00002 - Human Resources Analyst), 'Department' (Human Resources (114)), 'Division', 'Class Spec' (Human Resources Analyst (1001)), 'Job Title' (Human Resources Analyst), 'Job Number' (00002), 'Job Type' (Full Time), 'Job List' (Default Job Listing), 'Exam Type' (Open), 'Advertise From' (04/04/2017), 'Advertise To' (04/18/2017, 11 pm, :59), 'Enable Maximum Number of Applicants' (checked), 'Maximum Number of Applicants' (100), 'Category' (Unselected: Accounting and Finance, Administration, Administrative Assistant, Agriculture, Airports; Selected: Human Resources), 'Location On Job' (100 State Street, Grand City), 'Application Template' (Default), 'Reapply Period (Days)' (1), and 'Assigned To' (Hanna, Jason). A rich text editor at the bottom contains the job description: 'Apply principles of psychology to human resources, administration, management, sales, and marketing problems. Activities may include policy planning, employee testing and selection, training and development, and organizational development and analysis. May work with management to organize the work setting to improve worker productivity.'

4. Complete the form using the table below.

* Required




Job Posting Checkbox Fields

| Field | What to Enter |
|----------------------------|--|
| Draft | Select Draft to keep the job posting in a “work in progress” state. It is a best practice to select this field until you’ve thoroughly reviewed the job posting and are ready to post the job online. This prevents posting online with errors or without job-specific supplemental questions. |
| Archived | Select Archived at the end of the recruitment process. This should be done after you’ve hired the ideal candidate and you’re filing away records. Along with the job posting, you will likely archive the exam plan, eligible list and referred list. |
| Accept Online Applications | Select Accept Online Applications to allow online candidates to submit their applications for employment. |
| Show Closing Date/Time | Select Show Closing Date/Time to display the closing date and time on the job posting. If the job is open until filled, then you may opt to deselect. This will remove the closing date and time from the job posting. |
| Continuous | Select Continuous to display the word “Continuous” for the job posting closing date and time. |

* Required

Job Posting Fields

| Field | What to Enter |
|------------------|--|
| * Exam Plan | Pre-populates with the correct associated exam plan since you’re creating the job posting from the exam plan. |
| * Agency | Pre-populates with the same agency assigned to the requisition and resulting exam plan. |
| Division | Pre-populates with the division assigned to the requisition and resulting exam plan. |
| * Class Spec | Pre-populates with the class specification indicated in the requisition and resulting exam plan. |
| * Job Title | Pre-populates with the job title specified in the requisition and resulting exam plan. |
| * Job Number | Pre-populates with the number assigned to the requisition and resulting exam plan. |
| * Job Type | Pre-populates with the job type assigned to the exam plan. |
| * Job List | Leave the default value of “Default Job Listing.” |
| * Exam Type | Pre-populates with the exam type assigned to the exam plan. |
| * Advertise From | Enter the date on which you will start to accept online applications for employment. At 12 midnight (in your time zone) on the opening day, the job will post and allow online applications. |
| * Advertise To | Enter the date and time that you will close the job and stop accepting online applications. |

| | |
|---|---|
| Enable Maximum Number of Applicants | Select to close the job posting once a specified maximum number of applications have been received, even if this occurs <u>prior to</u> the specific closing date. Closure will occur regardless of the Continuous field selection. If the Continuous field is not selected and the maximum is not reached, the job posting will close on the date in the Advertise To field. |
| * Maximum Number of Applicants <i>(Required if Enable Maximum Number of Applicants is selected.)</i> | This field will only display if “Enable Maximum Number of Applicants” is selected. Enter the maximum number of applications that will be accepted for the job posting. If the Continuous field is not selected and the maximum is not reached, the job posting will close on the date in the Advertise To field. Note: Due to a slight syncing delay between the online application process and Insight, a few accepted applications over the maximum is possible. |
| * Category | Select one or multiple job categories that classifies the position. |
| * Location On Job Posting Display | Click  and select the location for this job opening. This will display on the printed job bulletin and the career page for the posting. |
| * Government Jobs Location | Defaults to SC - Columbia |
| * Search Locations | Allows the user to filter available vacancies by location using the Locations filter on the Career Page. |
| * Application Template | Click  and select the correct application template. |
| * Reapply Period (Days) | Enter the number of days a candidate must wait to reapply for this job posting. If you do not want candidates to reapply for this job posting, set the number to equal the total number of days the job posting is open, or higher (e.g., if the job posting is open for 14 days, then enter 14). Note: Setting the number to 0 is not recommended as this allows a candidate to reapply as many times as they’d prefer within the same day. |
| * Assigned To | Defaults to the current user. Click  and select the applicable Insight user. |
| Job Responsibilities | Enter a description of the work performed by the person in the position. Click Complete From Class Spec to copy the verbiage over from the associated class specification. This is the one and only time to take advantage of the complete function; if you return after saving, the complete buttons will not be available. |
| Minimum and Additional Requirements | List any minimum and additional requirements for the position. Click Complete From Class Spec to copy the verbiage over from the associated class specification. This is the one and only time to take advantage of the complete function; if you return after saving the complete buttons will not be available. |
| Preferred Qualifications | List the preferred qualifications for the position, if any. |
| Additional Comments | List additional comments, if any. |

| | |
|--|---|
| If bilingual, which language is desired? | This field is for internal tracking purposes only. If bilingual is desired for the job, select the applicable language. If a language is selected, it will not display on the job posting. |
| * Agency Specific Application Procedures | Enter any specific requirements. |
| Residency Requirement | List any specifics related to the residence requirement, if applicable. |
| Residency Requirement (specifics) | List any specifics related to the residence requirement, |
| * Class Code | Enter the classification code of the vacancy. |
| Slot Number | Enter the position's slot number, if applicable. |
| * Position Number | Enter the position number. |
| * EEO Category | Select the EEO Category from the drop down. |
| EEO Subcategory | Enter the EEO Subcategory, if applicable. |
| * FLSA Category | Choose the appropriate FLSA category for the position, Exempt or <u>Non-exempt</u> . |
| * Normal Work Schedule | Select the work schedule. This will be displayed on the job bulletin and Career Page for the position. |
| * Pay Band | Select the pay band for the position. For unclassified or positions that do not fall within the classified pay band system, select Unclassified. |
| Hiring Range - Min. | Enter the agency's minimum hiring range. |
| Hiring Range - Max. | Enter the agency's maximum hiring range. |
| * Opening Date | Enter the opening date for the position. |
| * EEO Statement | "Equal Opportunity Employer" must be selected and included on each posting. Agencies are strongly encouraged to add their agency specific EEO statement to each job posting. This can be placed in the job posting text or in the additional comment box. |

* Required

Salary Information

| Field | What to Enter |
|-------------------------------|---|
| Auto-Update | Select Auto-Update to have salary values updated automatically when the associated class specification's salary values are changed. |
| * Minimum Salary | Enter the minimum salary for the job. |
| Maximum Salary | Enter the maximum salary for the job. |
| * Per | Select the rate that coincides with the minimum and maximum salary values. |
| * Based on "X" hours per year | Select the correct hours per year. |
| * Show Salary Breakdown | Select one or multiple ways to display the salary values: Hourly, Daily, Weekly, Biweekly, <u>Semi-Monthly</u> , Monthly and/or Annually. |

Salary Display If you do not want to display the salary in a dollar amount, select this checkbox, then select from one of the following values: Depends on Qualifications, Negotiable, Not Displayed, See Position Description or Under Review.

* Required

Remaining Job Posting Fields

| Field | What to Enter |
|---------------------------|--|
| Internal Notes (optional) | Enter any additional information about the job posting in this field. The notes will not display to OHC users or candidates. |
| * Supplemental Questions | Select "Yes" if the posting will have supplemental questions and select "No" if not. |

5. Once you've finished, click **Save**.

Note: As soon as the Save button is selected, the posting will go live immediately unless the "Advertise From" date is a future date or the posting is in Draft status.

6. A preview of the job posting will display. Click **Edit** if you need to correct any typing errors or formatting issues and then save your corrections.

Detailed Job Posting

[View Class Spec](#) [View Exam Plan](#) [Supplemental Questions](#) [Item Bank](#) [Scoring Plan](#) [Edit](#) [Print Job Bulletin](#)

| Job # | Hits | Active | Total | Advertised |
|-------|------|--------|-------|------------------------------|
| 00002 | 0 | 0 | 0 | 04/18/17 - 04/18/17 11:59 PM |

Job Title Human Resources Analyst
Closing Date/Time Tue, 04/18/17 11:59 PM Pacific Time
Salary \$24.04 - \$36.06 Hourly
 \$1,923.08 - \$2,884.62 Biweekly
 \$4,166.67 - \$6,250.00 Monthly
 \$50,000.00 - \$75,000.00 Annually
Job Type Full Time
Location 100 State Street, Grand City, California
Department Human Resources

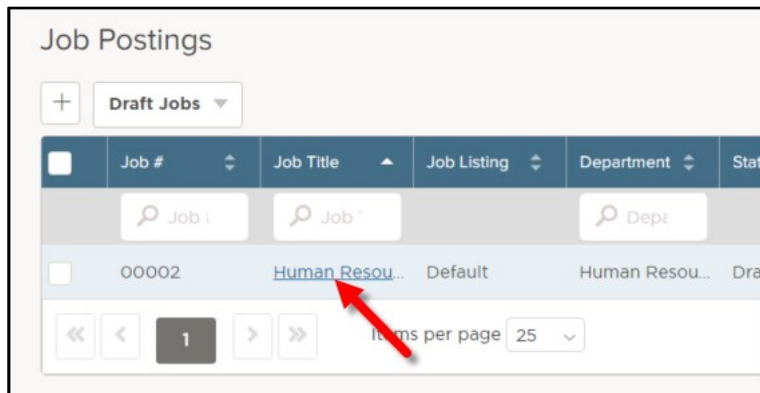
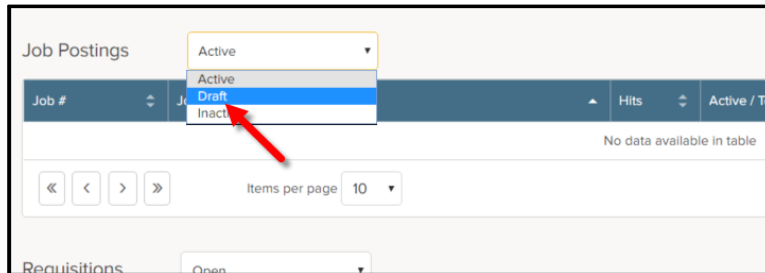
Description **Benefits**
 Apply principles of psychology to human resources, administration, management, sales, and marketing problems. Activities may include policy planning; employee testing and selection, training and development; and organizational development and analysis. May work with management to organize the work setting to improve worker

Create Job-Specific Supplemental Questions

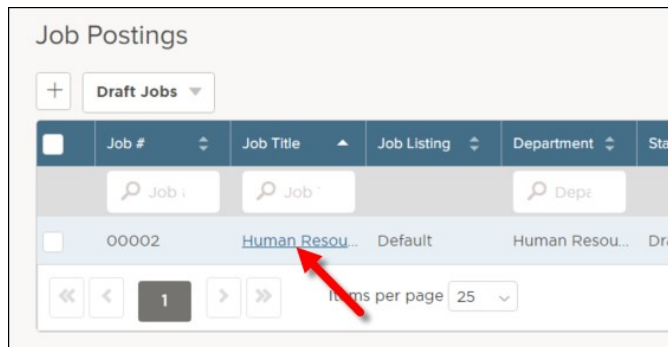
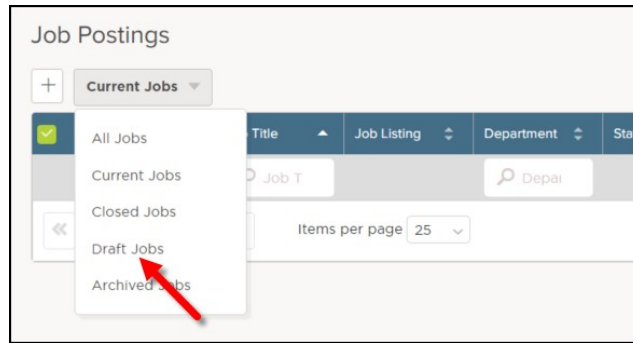
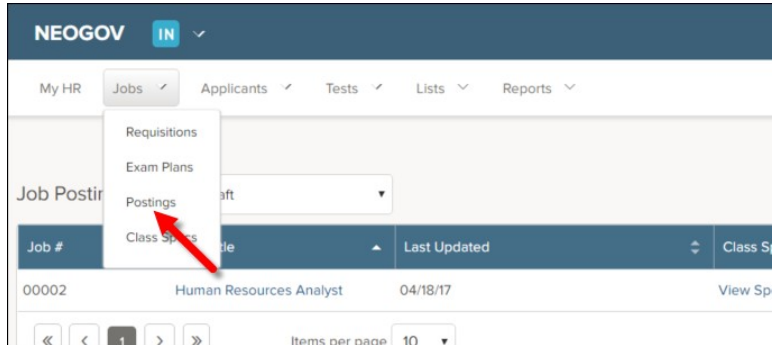
If the job posting is in draft status, continued modifications are allowed, including the addition of job-specific supplemental questions. These types of questions are often used to gather more specific information from candidates regarding their minimum, and even desired, qualifications that pertain specifically to the job opening.

Steps to Create Job-Specific Supplemental Questions

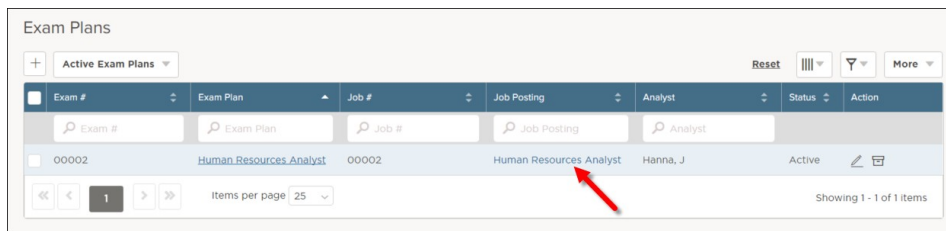
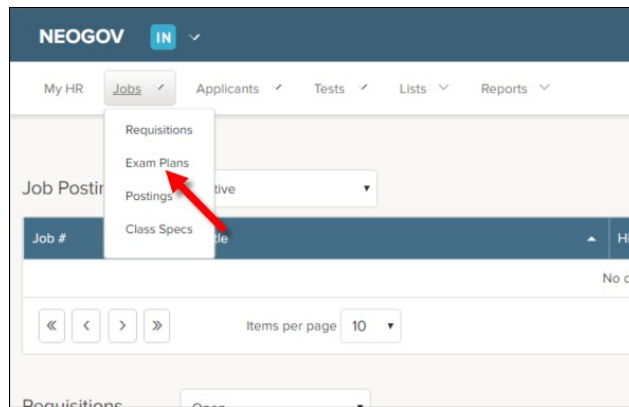
1. Return to the job posting in draft status by using one of the three methods listed below.
 - a. **Method 1:** From the **My HR** page, in the **Job Posting** section's **Status** pulldown, click **Draft** and then click the job title in the **Job Title** column.



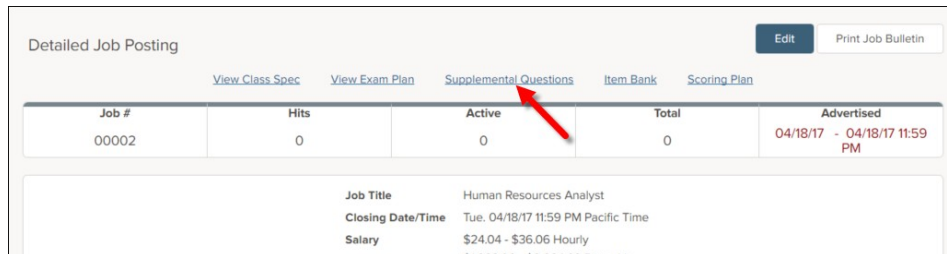
- b. **Method 2:** On the **Jobs** menu, click **Postings**. On the **Status** pulldown, click **Draft Jobs**. Click the job title from the **Job Tile** column.



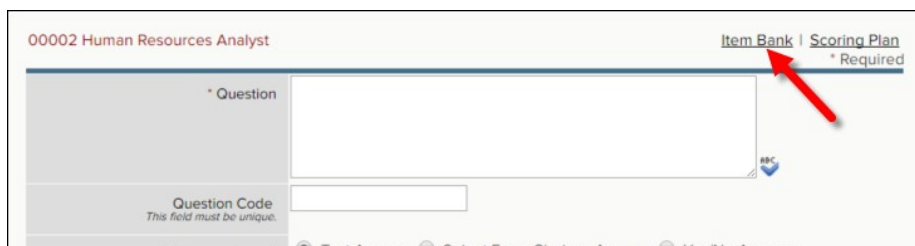
- c. **Method 3:** On the **Jobs** menu, click **Exam Plans**. From **Job Title** column, click the job title from the **Job Title** column.



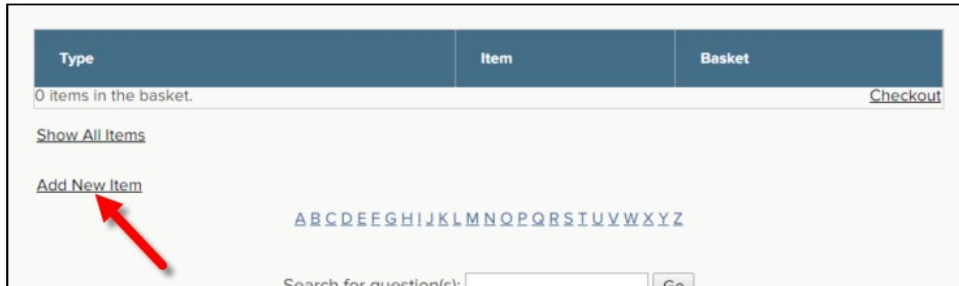
2. From the job posting page, click **Supplemental Questions**.



3. From here, you're prompted to add the first job-specific supplemental question. If the question will only be used for this job posting and not for others like it in the future, proceed to add the question. Otherwise, go to the item bank where the question will be stored for upcoming job postings. For this training example, you'll gain experience adding questions in the item bank. Click **Item Bank**.



- Click **Add New Item** to add your first item to the item bank.



- The item form will display.

The screenshot shows the item form with the following fields and values:

- * Question:** How many years of professional-level work experience do you have as a Human Resources Analyst?
- * Category:** Human Resources
- * Type:** Summary of Work Experience
- * Response Format:** Text Answer Select From Choices Answer Yes/No Answer
- * Input Type:** Radio
- * Response Options:** When you choose the "Select From Choices" response format, you need to provide several response options from which job seekers can choose. To enter the options use a text box displayed below.

| Internal Code | Response Option | Points | Sort |
|---------------|------------------------------|--------|------------|
| None | No experience | | ↑ ↓ DELETE |
| Less1 | Less than 1 year | | ↑ ↓ DELETE |
| 1to2 | 1 year to less than 2 years | | ↑ ↓ DELETE |
| 2to3 | 2 years to less than 3 years | | ↑ ↓ DELETE |
| 3more | 3 or more years | | ↑ ↓ DELETE |

 Add Option
- * Required Question:** Yes
- Confidential:** Check here if this question is confidential.

- Complete the form using the table below.

| Field | What to Enter | * Required |
|-------------------|---|------------|
| * Question | Enter the question. | |
| * Category | Select the proper job category. | |
| * Type | Select the proper question type. | |
| * Response Format | Depending on the question, select Text Answer, Select From Choices Answer or Yes/No Answer. | |

| | |
|---------------------|---|
| * Input Type | If Response Format is set to Text Answer, select either Scrolling Text Box (a larger text field) or Text (a single line text field). If Response Format is set to Select From Choices Answer, select either Radio, Drop Down Box Single, Drop Down Box Multiple or CheckBox. Note: If the question is multiple choice, use either Radio or Drop Down Box Single. If the question is multiple select, use Drop Down Box Multiple or CheckBox. |
| * Response Options | Select the appropriate response option for the input type. |
| * Required Question | Select Yes to prevent candidates from leaving the question unanswered. Select No if answering the question is optional. |
| Confidential | Select Confidential if there should be restricted viewing of candidates' responses; otherwise, leave the checkbox deselected. Only Insight users with access to view confidential information will see confidential questions. OHC users will not see confidential questions, regardless of permissions. |

7. Repeat steps 4-6 to add additional questions.

8. From the **Basket** column, click **Add** for all questions you want to add to your job posting.

Page 1 of 1

| Type | Item | Basket | Action |
|----------------------------|---|---------------------|--|
| Education | Do you have a Bachelor's Degree in Human Resources, Industrial Relations, Public Administration, Business Administration, or a closely related field? | Add | Edit Delete Copy |
| Summary of Work Experience | How many years of professional-level work experience do you have as a Human Resources Analyst? | Add | Edit Delete Copy |

Page 1 of 1

9. This will add the questions to your basket. Once you've finished, click **Checkout**.

| Type | Item | Basket |
|-------------------------|---|--------------------------|
| 2 items in the basket. | | Checkout |
| Education | Do you have a Bachelor's Degree in Human Resources... | Remove |
| Summary of Work Expe... | How many years of professional-level work experien... | Remove |

10. Click **Add New Question** to add an additional question to your job posting that will not be stored in the item bank.

00002 Human Resources Analyst Quick Sort | [Item Bank](#) | [Scoring Plan](#)

[Add New Question](#) [Show Inactive Questions](#)

| # | Question | Cat. | Req. | Conf. | Emp. | Action |
|----|--|------|------|-------|------|---|
| 1. | How many years of professional-level work experience do you have as a Human Resources Analyst? <input type="radio"/> No experience <input checked="" type="radio"/> Less than 1 year | | . | | | Edit Inactivate Up Down |

11. The question form will display.

12. Complete the form using the table below.

| Field | What to Enter | * Required |
|---|--|------------|
| * Question | Enter the question. | |
| Question Code | Enter a code or abbreviation for the question. | |
| * Response Format | Depending on the question, select Text Answer, Select From Choices Answer or Yes/No Answer. | |
| * Input Type | If Response Format is set to Text Answer, select either Scrolling Text Box (a larger text field) or Text (a single line text field). If Response Format is set to Select From Choices Answer, select either Radio, Drop Down Box Single, Drop Down Box Multiple or CheckBox. Note: If the question is multiple choice, use either Radio or Drop Down Box Single. If the question is multiple select, use Drop Down Box Multiple or CheckBox. | |
| * Response Options | If Response Format is set to Select From Choices Answer , click Add Option to add a response option and enter an abbreviation, number or letter in the Internal Code field, the description in the Response Option field, and optionally, a number in the Points field for auto-scoring setup. Repeat these steps to add additional response options. This option is only available if Select From Choices Answer is selected as the response format. | |
| Is the candidate required to answer the question? | Select "Yes" to prevent candidates from leaving the question unanswered. Select "No" if answering the question is optional. | |
| Confidential Question | Select "Yes" to make the question confidential; otherwise, select "No." Only Insight users with access to view confidential information will see confidential questions. OHC users will not see confidential questions, | |

| | |
|---------------------------|---|
| | regardless of permissions. |
| Employer Use Only | Select "No" if you want online candidates to see the question. You will only select "Yes" if you want only Insight users to see the question. |
| Allow on Panel Templates? | Select "No." |
| Panel Column Name | Leave this field blank. |

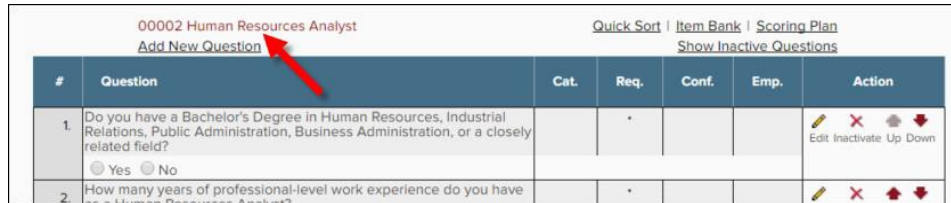
13. Repeat steps 10-12 to add additional questions.

14. Click the up and down arrows to arrange questions in the proper order.

| 00002 Human Resources Analyst | | Quick Sort Item Bank Scoring Plan | | | | |
|----------------------------------|---|---|------|-------|------|-----------------------------|
| Add New Question | | Show Inactive Questions | | | | |
| # | Question | Cat. | Req. | Conf. | Emp. | Action |
| 1. | How many years of professional-level work experience do you have as a Human Resources Analyst? <input type="radio"/> No experience <input type="radio"/> Less than 1 year <input type="radio"/> 1 year to less than 2 years <input type="radio"/> 2 years to less than 3 years <input type="radio"/> 3 or more years | | * | | | Edit Inactivate Up Down |
| 2. | Do you have a Bachelor's Degree in Human Resources, Industrial Relations, Public Administration, Business Administration, or a closely related field? <input type="radio"/> Yes <input type="radio"/> No | | * | | | Edit Inactivate Up Down |
| 3. | Please enter the exact field of your Bachelor's degree in the box below. If you do not have a Bachelor's degree, enter N/A. <input type="text"/> | | * | | | Edit Inactivate Up Down |

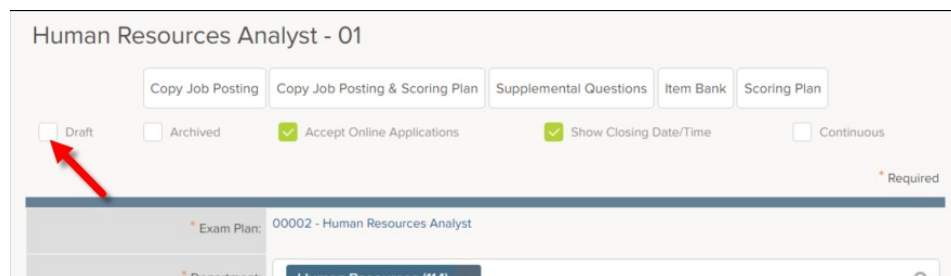
Steps for Publishing the Job Posting on the Web

1. If your job posting is in draft status and you wish to publish it to the web, return to the job posting edit page. If you're editing the supplemental questions, a shortcut to the job posting page exists from the Supplemental Questions page. Click the job number and title that displays in red text.



| # | Question | Cat. | Req. | Conf. | Emp. | Action |
|---|---|------|------|-------|------|-----------------------------|
| 1 | Do you have a Bachelor's Degree in Human Resources, Industrial Relations, Public Administration, Business Administration, or a closely related field? <input type="radio"/> Yes <input type="radio"/> No | | * | | | Edit Inactivate Up Down |
| 2 | How many years of professional-level work experience do you have as a Human Resources Analyst? | | * | | | |

2. Deselect **Draft**, scroll to the bottom of the page and click **Save**.



Human Resources Analyst - 01

Draft Archived Accept Online Applications Show Closing Date/Time Continuous

* Required

Exam Plan: 00002 - Human Resources Analyst

Department: Human Resources (448)

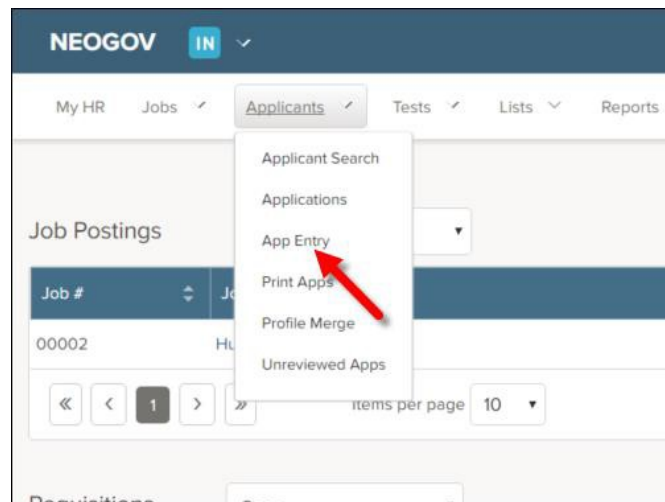
3. Congratulations! You've published your job posting on the web.

Module 4: Enter a Paper Application

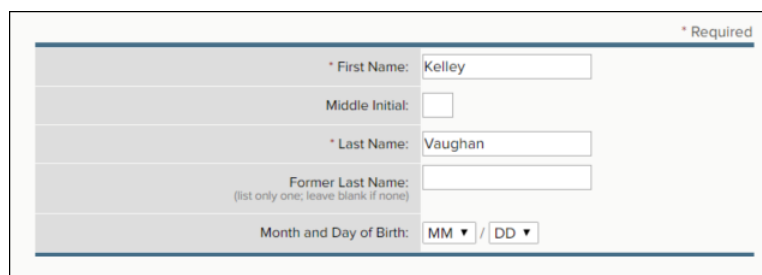
Once a posting has been published for the web, agencies are able to accept online applications. Some agencies allow applicants to submit paper applications for positions. The following steps document how to capture the information submitted on a paper application through Insight.

Steps to Enter a Paper Application

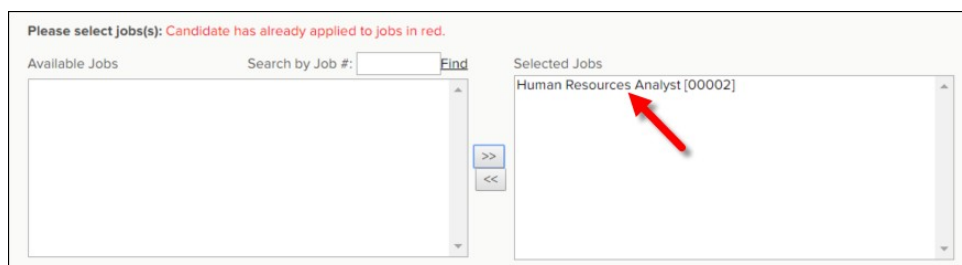
1. On the **Applicants** menu, click **App Entry**.



2. Enter the applicant's first and last name.

A screenshot of a form for entering applicant information. The form has a '* Required' label in the top right corner. It contains the following fields: '* First Name:' with the value 'Kelley'; 'Middle Initial:' with an empty field; '* Last Name:' with the value 'Vaughan'; 'Former Last Name:' with a note '(list only one, leave blank if none)' and an empty field; and 'Month and Day of Birth:' with dropdown menus for 'MM' and 'DD'.

3. Move the job to the **Selected Jobs** box and click **Submit**.

A screenshot of the job selection interface. It features a red warning message: 'Please select job(s): Candidate has already applied to jobs in red.' Below this, there are two list boxes: 'Available Jobs' on the left and 'Selected Jobs' on the right. The 'Selected Jobs' box contains the entry 'Human Resources Analyst [00002]'. A red arrow points to this entry. Between the two boxes are '>>' and '<<' buttons for moving items.

4. Enter the required information on the application form.


| Job # | Job Title |
|-------|-------------------------|
| 00002 | Human Resources Analyst |

Please correct highlighted fields * Required

| | |
|--|---|
| Former Last Name: <small>(list only one; leave blank if none)</small> | <input type="text"/> |
| Month and Day of Birth: | MM <input type="text"/> DD <input type="text"/> |
| * Date Received: | April <input type="text"/> 21 <input type="text"/> 2017 <input type="text"/> |
| * Time Received: | 4 pm <input type="text"/> :57 <input type="text"/> |
| * First Name: | Kelley |
| Middle Initial: | <input type="text"/> |
| * Last Name: | Vaughan |
| * Address: | 17103 Monte Bello |
| | <input type="text"/> |
| * City: | Cupertino |
| * State: | California <input type="text"/> |
| * Zip Code: | 95014 |
| Country: | US <input type="text"/> |
| Home Phone: | <input type="text"/> |
| Alternate Phone: | <input type="text"/> |
| Email: <small>If Notification Type is Email then required.</small> | <input type="text"/> |
| * Notification Type: | Paper <input type="text"/> |
| Do you possess a valid Driver's License? | <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> No Response |

5. Once you've finished, click **Save & Exit App. Entry**.

[Attach another file](#)



Note: Repeat steps 2–4 to add additional applications and click **Save & Enter Another** until all applications have been entered. Once all application have been entered, click **Save & Exit App. Entry**.

Module 5: Evaluate Candidates and Send Notices

Once applications have been received, you will evaluate the candidates. You can also send notices to anyone that did not meet the minimum qualifications. The system is programmed with the first evaluation step of Application Received. If you have additional evaluation steps that you would like to add, see Module 5a: Create an Evaluation Step.

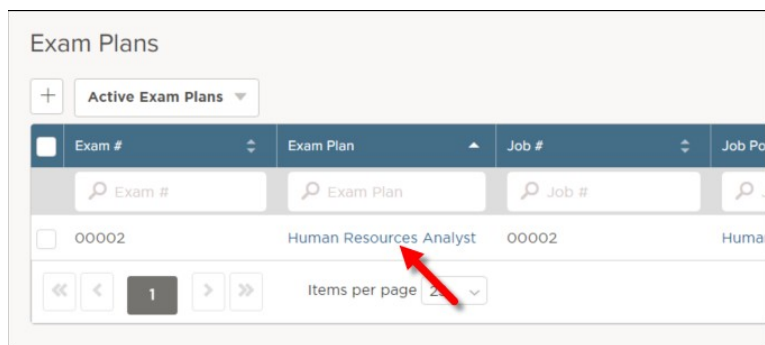
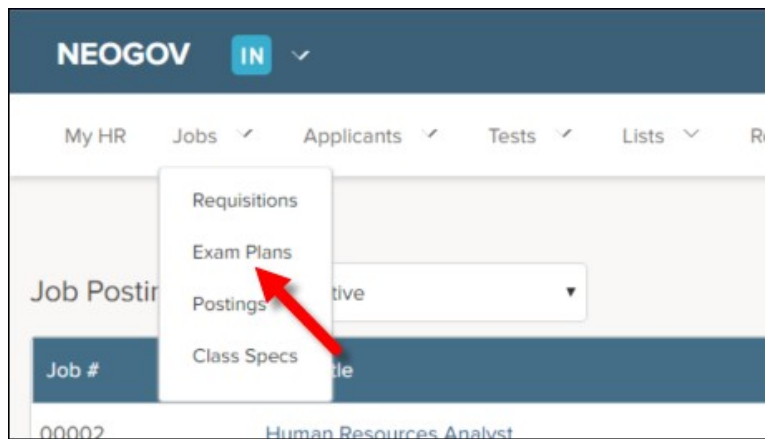
Steps to Evaluate Candidates Manually

1. Return to the exam plan using one of the following methods.

a. **Method 1:** Click the exam number from the **My HR** page.



b. **Method 2:** On the **Jobs** menu, click **Exam Plans** and then click the job title from the **Exam Plan** column.



2. Click **View Applicants by Step** or click the name of the evaluation step to view the candidates.

| Recruiting Plan Add New | | | | | | |
|--|---|-----------------|------------------------------|----------|----------------------|--|
| Ad Type | Ad Name | Requested Date | Start Date | End Date | Action | |
| Evaluation Steps Add Step View Applicants (10) View Applicants by Step (10) App Flow Print Apps | | | | | | |
| Step | Evaluation Step | Weight | Results | At Step | Action | |
| Step 1 | Minimum Qualifications Review | N/A | View Results | 10 | Edit | Delete Audit Trail |
| Advanced Filters Add Evaluation Step Filter Add Eligible List Filter | | | | | | |
| Title | Created By | Filter Type | | | Action | |
| Eligible Lists Add New Show Archived Eligible Lists | | | | | | |
| List Name | List Type | Expiration Date | # On List | | Action | |

3. Click the name of your first candidate.

| Candidate | Person ID | Master Profile | Disposition | SME | Email Notify | Source | Received | Notices | Audit Trail |
|-----------------------------------|-----------|----------------------|---------------------|-----|--------------|--------|-------------------|---------|----------------------|
| Blackburn, Gordon | 32145490 | View | N/A | | | Paper | 04/21/17 06:17 PM | N/A | View |
| Cole, Lin | 32145580 | View | N/A | | | Paper | 04/21/17 06:29 PM | N/A | View |
| Learner, James | 32144449 | View | N/A | | | Online | 04/21/17 04:19 PM | N/A | View |
| Newman, Carla | 32145502 | View | N/A | | | Paper | 04/21/17 06:20 PM | N/A | View |
| O'Brien, Julie | 32145507 | View | N/A | | | Paper | 04/21/17 06:21 PM | N/A | View |

4. The application will display. After reviewing the application, scroll to the top of the page and click **Show Candidate Disposition**.

[View Exam Plan](#) [View All Applicants](#) [View Applicants By Step](#) [Education Scoring](#) [Work Experience Rating](#) [Special Credit Rating](#) [Add Skills](#) [View Master Profile](#)

Application 1 of 10 [« Previous Applicant](#) | [Next Applicant »](#) [Show Candidate Disposition](#) [Print View](#)

00002 - Human Resources Analyst

Contact Information -- Person ID: 32145490

Name: Gordon Blackburn Address: 123 Main Street, Los Angeles, California 90001 US

Home Phone: Alternate Phone: Notification Preference: Paper

5. The rating panel will display. Click Passed, Failed or Other from the **Pass/Fail Step** field and click **Save & View Next App** to proceed to the next candidate.

[Hide Candidate Disposition](#)

View Applicants By Step

Exam Plan: **00002 - Human Resources Analyst**

Evaluation Step: **Minimum Qualifications Review**

* Required

Applicant: Name: Blackburn, Gordon Person ID: 32145490

* Pass/Fail Step: Passed Failed Other

Reject Reason: == Select ==

Comments:

[Save](#) [Save & View Next App »](#)

Application 1 of 10 [« Previous Applicant](#) | [Next Applicant »](#) [Print View](#)

Note: A rejection reason must be selected from the **Reject Reason** pulldown if an applicant is failed.

6. Pass the remaining candidates until you've reached the bottom of the **list**. You'll know when you have reached the bottom by the application count in the lower left corner and the **Save & View Next App** button no longer displays. Pass or reject your last candidate and click **Save**. A confirmation displays stating Disposition Updated Successfully.

The screenshot shows a web interface for reviewing an applicant. At the top, it displays 'Exam Plan: 00002 - Human Resources Analyst' and 'Evaluation Step: Minimum Qualifications Review'. Below this, a message reads 'Disposition Updated Successfully * Required'. The applicant's details are shown in a table: Walker, Michael with Person ID 32145549. There are radio buttons for 'Passed' (selected), 'Failed', and 'Other'. A 'Reject Reason' dropdown menu is set to '== Select =='. A 'Comments' text area is empty. At the bottom, there are two buttons: '< Save & View Prev. App' and 'Save'. The 'Save' button is highlighted with a red arrow. In the bottom left corner, the text 'Application 10 of 10' is circled in red. Other navigation options include '< Previous Applicant | Next Applicant >' and 'Print View'.

7. Click **View Applicants By Step** to return to your list of candidates.

The screenshot shows a navigation menu with several links: 'View Exam Plan', 'View All Applicants', 'View Applicants By Step', 'Education Scoring', 'Work Experience Rating', 'Special Credit Rating', 'Add Skills', and 'View Master Profile'. The 'View Applicants By Step' link is highlighted with a red arrow. Below the menu, the top of the application review form is visible, showing 'Exam Plan: 00002 - Human Resources Analyst' and 'Evaluation Step: Minimum Qualifications Review'. A 'Hide Candidate Disposition' link is also present in the top right corner.

Steps to Send Notices

1. To send a fail notice to the applicable candidate(s), select **Email Notify** from the **Select Action pulldown**, select **Failing** from the **Select Candidate(s) pulldown** and click **Go**.

| Candidate | Person ID | Action | Status | Exam Plan | Date |
|--|-----------|----------------------|--------|-----------|----------|
| <input type="checkbox"/> Vaughan, Kelley | 32145567 | View | Pass | Paper | 04/21/17 |
| <input type="checkbox"/> Walker, Michael | 32145549 | View | Pass | Paper | 04/21/17 |

10 Records Found

Email Notify [dropdown] Failing [dropdown] **Go**

[View Exam Plan](#) [Eligible List\(s\)](#)

2. Select **Failed Minimum Qualifications** from the **Template** pulldown and click **Generate Notices**.

Disposition: Does not meet minimum requirements Template: Failed Minimum Qualifications [dropdown] [Edit Template](#)

| Candidate | Person ID | Email | Date & Time Received |
|-------------|-----------|--------------------------------|----------------------|
| Cole, Linda | 32145580 | None - notice will not be sent | 04/21/17 06:29 PM |

Generate Notices [button]

3. Click **Send** to send the notice(s).

[View Applicants By Step](#)

Human Resources Analyst
Email preview appears below. Emails will NOT be sent until you click on the 'Send' button.

Does not meet minimum requirements Template: Failed Minimum Qualifications

| Candidate | Person ID | Email | Date & Time Received |
|-------------|-----------|--------------------------------|----------------------|
| Cole, Linda | 32145580 | None - notice will not be sent | 04/21/17 06:29 PM |

Send [button]

Email 1 (To:)

Linda Cole
123 Main Street
Los Angeles, CA 90001

April 22, 2017
Re: 00002
Dear Linda:

We are sorry to inform you that your application for Human Resources Analyst is no longer being considered because you did not meet the minimum qualifications for the position.

4. A confirmation displays stating "Emails sent successfully." Click **View Applicants By Step** to return to your list of candidates.

[View Applicants By Step](#)

Human Resources Analyst
Email preview appears below. Emails will NOT be sent until you click on the 'Send' button.

Does not meet minimum requirements Template: Failed Minimum Qualifications

| Candidate | Person ID | Email | Date & Time Received |
|-------------|-----------|--------------------------------|----------------------|
| Cole, Linda | 32145580 | None - notice will not be sent | 04/21/17 06:29 PM |

Module 6: Refer Candidates to the Hiring Manager

For this training module, you will place all candidates that passed the minimum qualifications review and any additional evaluation steps on an eligible list. An eligible list is a listing of qualified candidates. From the eligible list, you will refer a subset or all candidates to the hiring department.

Steps to Place Candidates on an Eligible List

1. Return to the exam plan. From the **My HR** page, click exam number. Alternatively, on the **Jobs** menu, click **Exam Plans** and then click the **Job Title** from the **Exam Plan** column.
2. Click the name of the last evaluation step to view applicants by step.

| Step | Evaluation Step | Weight | Results | At Step | Action |
|--------|--|--------|------------------------------|---------|---|
| Step 1 | Application Received | N/A | View Results | 0 | Edit Audit Trail |
| Step 2 | Supplemental Questionnaire | N/A | View Results | 0 | Edit Delete Audit Trail |
| Step 3 | Training and Experience | N/A | View Results | 57 | Edit Delete Audit Trail |

3. To place the passing candidates on the eligible list, select **Place on Eligible List** from the **Select Action** pulldown, select **Passing** from the **Select Candidate(s)** pulldown and then click **Go**.

| | | | | | | | |
|--------------------------|-----------------|----------|----------------------|--|--|-------|------|
| <input type="checkbox"/> | Vaughan, Kelley | 32145567 | View | ● Pass - 86.67% | | Paper | 04/2 |
| <input type="checkbox"/> | Walker, Michael | 32145549 | View | ● Fail - 60.00% | | Paper | 04/2 |

6 Records Found

Place on Eligible List

4. Leave the default to **today's date** from the **Eligible Date**, the default of **Default List** from the **Select List** field and click **Assign To List**.

| Candidate | Person ID |
|-------------------|-----------|
| Blackburn, Gordon | 32145490 |
| Learner, James | 32144449 |
| Ortman, Julie | 32145507 |
| Palmer, Mark | 32145518 |
| Vaughan, Kelley | 32145567 |

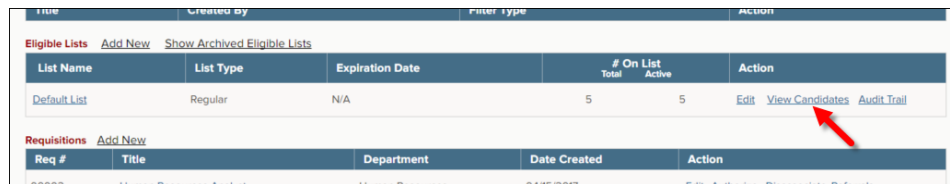
Eligible Date: 10/27/17 Select List: Default List

Create a Referred List

In the previous section, you learned how to place candidates that passed an evaluation step on an eligible list. You will now refer these same candidates to the hiring department. This referral action creates a referred list. Once the referred list is created, the hiring manager can begin reviewing applications, scheduling candidates for hiring interviews and eventually hire the ideal candidate.

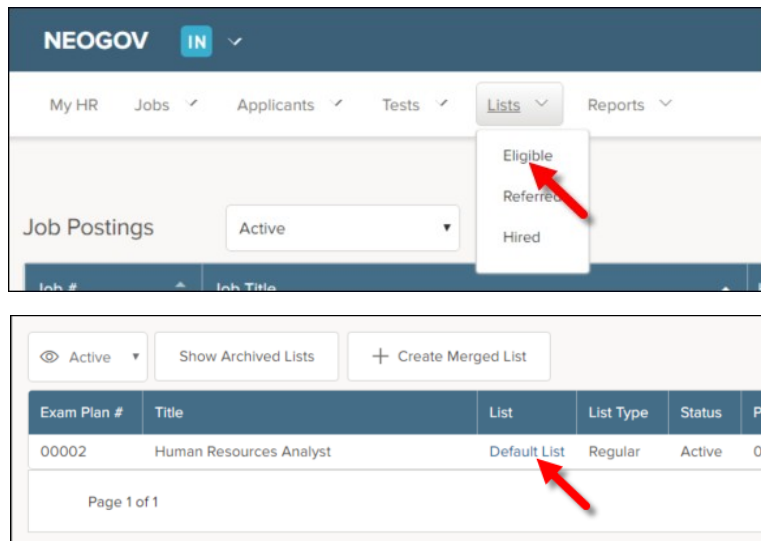
Steps to Create a Referred List

1. If you're not already viewing your eligible list, return to the eligible list.
 - a. **Method 1:** Return to your exam plan and click **View Candidates** from the **Eligible Lists** section.



| List Name | List Type | Expiration Date | # On List Total | # On List Active | Action |
|--------------|-----------|-----------------|-----------------|------------------|----------------------------------|
| Default List | Regular | N/A | 5 | 5 | Edit View Candidates Audit Trail |

- b. **Method 2:** Click **Eligible** on the **Lists** menu and then click the **list name** from the **List** column.




The top screenshot shows the 'NEOGOV IN' header and navigation tabs: My HR, Jobs, Applicants, Tests, Lists, Reports. The 'Lists' dropdown menu is open, showing 'Eligible', 'Referred', and 'Hired'. A red arrow points to 'Eligible'.

The bottom screenshot shows a table with columns: Exam Plan #, Title, List, List Type, Status, and Priority. The first row is: 00002, Human Resources Analyst, Default List, Regular, Active, 04. A red arrow points to 'Default List'.

- To create a referred list, select **Refer** from the **Select Action** pulldown, select **All Candidates** from the **Select Candidate(s)** pulldown, select the open **requisition** from the **Select Requisition** pulldown and click **Go**.

- The Refer Eligible Candidates page will display. Enter any informational text in the Comments box. Click **Refer** when you've finished. This will send an email notification to all hiring managers assigned to the requisition regarding the new referred list of candidates. The text entered in the Comments box will display in the email notification.

| Candidate | Person ID | Rank | Total Score |
|-------------------|-----------|------|-------------|
| Learner, James | 32144449 | 1 | 92.63 |
| Vaughan, Kelley | 32145567 | 2 | 90.07 |
| Ortman, Julie | 32145507 | 3 | 87.07 |
| Palmer, Mark | 32145518 | 4 | 83.97 |
| Blackburn, Gordon | 32145490 | 5 | 75.77 |

- To edit the referred list settings, from the **Action** column click the **Edit** icon .

5. The Edit Referred List page will display.

The screenshot shows a form titled "Edit Referred List" with a "* Required" indicator in the top right corner. The form contains five rows of input fields:

- Display Candidate Status As:** A text input field containing "Referred to the hiring manager".
- Referred List Inactivity Notice:** A dropdown menu showing "7 days".
- Referred List Expiration Notice:** A dropdown menu showing "14 days".
- Referred List Expiration Days:** A text input field containing "120".
- Referred List Expiration Date:** An empty text input field.

6. Complete the form using the table below.

| Field | What to Enter | * Required |
|---------------------------------|---|------------|
| Display Candidate Status As | This message will display to candidates who sign back into Career Pages to see their current application status. For example, enter "Referred to hiring manager," or something similar. | |
| Referred List Inactivity Notice | An email notification will be sent to the assigned analyst if the assigned hiring managers have not taken action on the list after the number of days specified in this field. | |
| Referred List Expiration Notice | An email notification will be sent to the assigned hiring managers regarding the soon-to-be-expired list based on the number of days specified in this field. | |
| Referred List Expiration Days | Enter the total number of days or specific expiration date (below field). Not both. | |
| Referred List Expiration Date | Enter a specific expiration date or the total number of days (above field). Not both. | |

7. Click **Save** once you've finished.

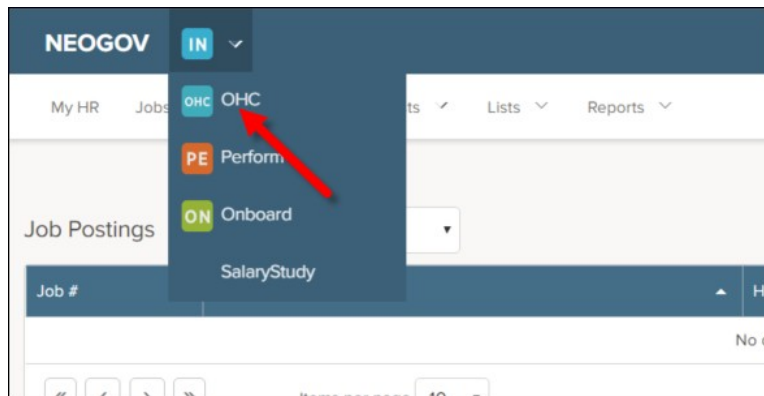
Module 7: Complete Interview and Hiring Tasks in the OHC

In the previous training module, you created a referred list of qualified candidates for the assigned hiring manager to review. This will send an email notification to the hiring manager assigned to the requisition regarding the new referred list of candidates. Now the hiring manager can begin reviewing applications, scheduling candidates for hiring interviews and eventually hire the ideal candidate.

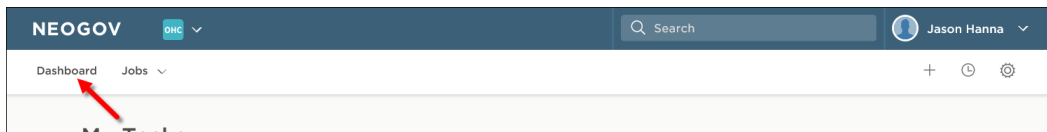
The subsequent steps are used by the hiring manager to complete interview and hiring tasks from the OHC. Some agencies allow hiring managers outside of the HR office to access the system through the OHC, while others do not. Please check your agency's policies and procedures to determine who is responsible for this portion of the hiring process.

Steps to Schedule Interviews

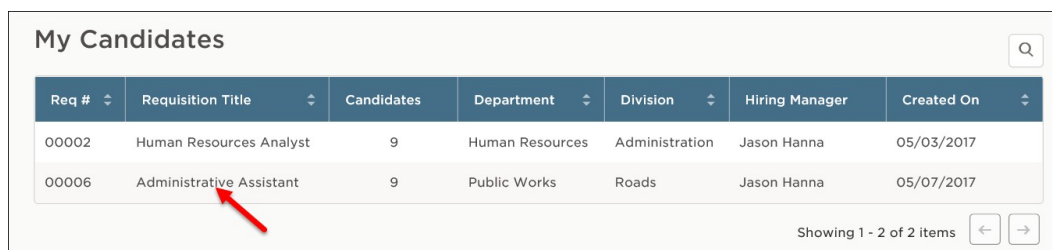
1. If you're not already in the OHC, select **OHC** from the **NEOGOV Product** menu.



2. Click Dashboard from the upper left corner if you do not see the **My Candidates** section.



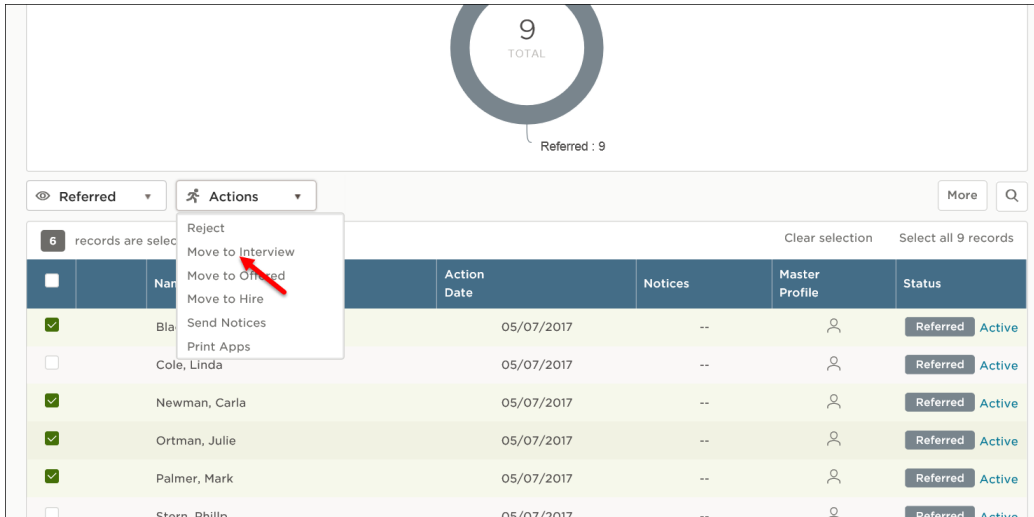
3. From the **My Candidates** section, click the referred list that will have scheduled interviews.



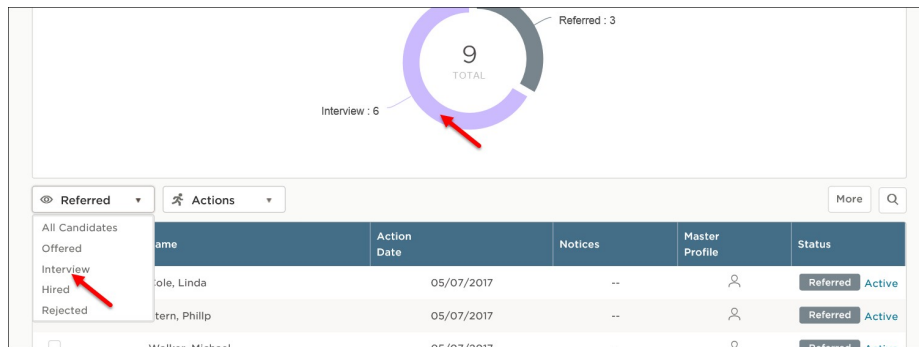
| Req # | Requisition Title | Candidates | Department | Division | Hiring Manager | Created On |
|-------|--------------------------|------------|-----------------|----------------|----------------|------------|
| 00002 | Human Resources Analyst | 9 | Human Resources | Administration | Jason Hanna |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

Showing 1 - 2 of 2 items

- Select the candidates that will be moved to the interview step.
- On the **Actions** menu, click **Move to Interview**.



- Click **OK** to confirm moving the candidates.
- The selected candidates have been moved from the referred step to the interview step. To schedule interviews, the view must be switched to the Interview step. Click **Interview** on either the **doughnut chart** or **Candidates** menu.



- Click **Unscheduled** for the first candidate to be scheduled for an interview.

| <input type="checkbox"/> | 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 |

9. The Interview Details page will display.

Interview Details

Interview Date * 10/30/2017

Location County Administration Building

Start Time 10:00 AM to End Time 11:00 AM Pacific Time (US & Canada); Tijuana

Interviewer Jason Hanna Select an interviewer

< October 30, 2017 > Today Month Week Day

10. Complete the form using the table below.

* Required

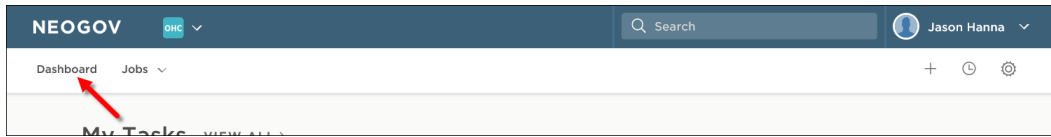
| Field | What to Enter |
|------------------|---------------------------------|
| * Interview Date | Enter the interview date. |
| Location | Enter the interview location. |
| Start Time | Enter the interview start time. |
| End Time | Enter the interview end time. |
| Interviewer | Select the interviewer name. |

11. Once you've finished, click **Save**.

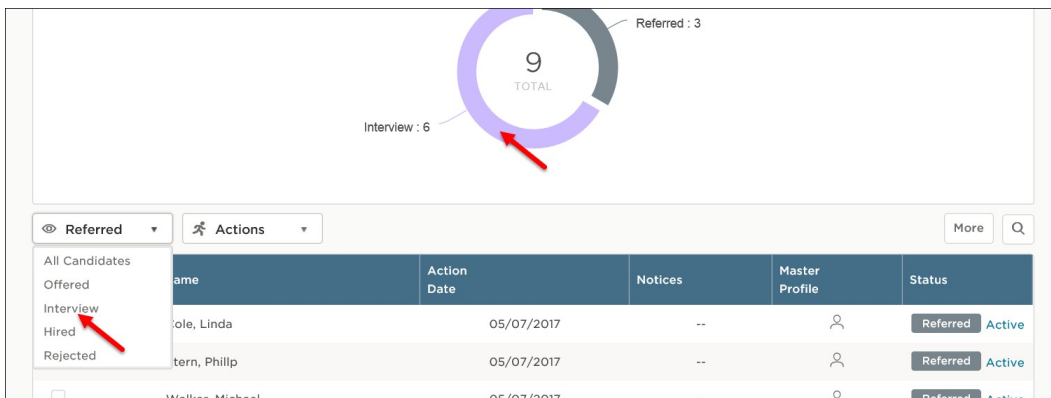
12. Repeat steps 8-11 to schedule the remaining candidates for interviews.

Steps to Reject a Single Candidate in the OHC

1. Return to the referred list if you're not already viewing the referred list of candidates. From the **My Candidates** section, click the referred list.



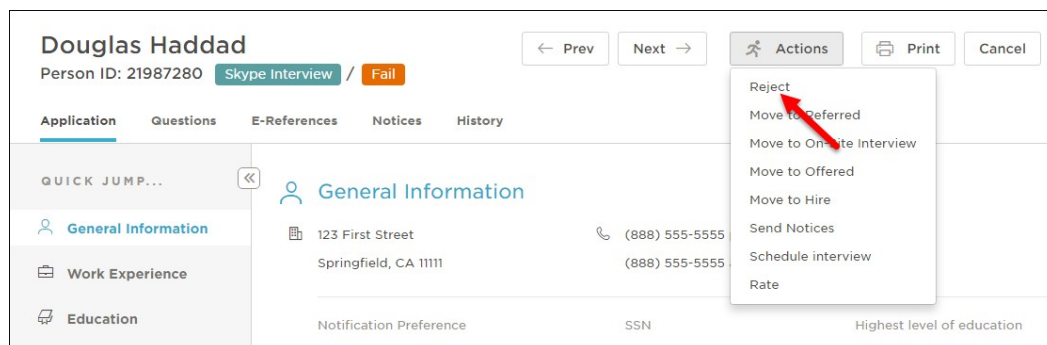
2. On the **doughnut chart** or on the **Candidates menu**, click the step name where you have reviewed candidates and determined one or more will be rejected.





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

| Name | Action Date | Notices | Master Profile | Status | Rating |
|-------------------|-------------|---------|----------------|---|-------------|
| Blackburn, Gordon | 05/08/2017 | -- | ... | Interview Scheduled for 10/17/2017 1... | Fail 60.00% |
| Newman, Carla | 05/08/2017 | -- | ... | Interview Scheduled for 10/19/2017 1... | Pass 90.00% |
| Ortman, Julie | 05/08/2017 | -- | ... | Interview Scheduled for 10/17/2017 2... | Pass 75.00% |
| Palmer, Mark | 05/08/2017 | -- | ... | Interview Scheduled for 10/19/2017 1... | Pass 85.00% |

4. On the **Actions** menu, click **Reject**.



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 turn on the setting.

Note: If you’d prefer to leave this switched off and send all rejected candidates notices at the same time, follow the steps outlined in the upcoming, *Send Rejection Notices in Bulk* section.

8. If you chose to automatically send a notice to the candidate upon rejection, select the proper notice template associated with your rejection reason.
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 ✎ Override

Template
Sample Candidate

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 finished, click **Save**.

11. Repeat these steps for any remaining rejected candidates.

Steps to Reject Candidates in Bulk in the OHC

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 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 to the **My Candidates** section on the dashboard. 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 candidates will be rejected.
3. Select all candidates that will have the same reject reason and comments.
4. On the **Actions** menu, click **Reject**.

| Name | Action Date | Notices | Master Profile | Status |
|-----------------|-------------|---------|----------------|-----------------|
| Cole, | 05/07/2017 | -- | 👤 | Referred Active |
| Stern, Phillip | 05/07/2017 | -- | 👤 | Referred Active |
| Walker, Michael | 05/07/2017 | -- | 👤 | Referred Active |

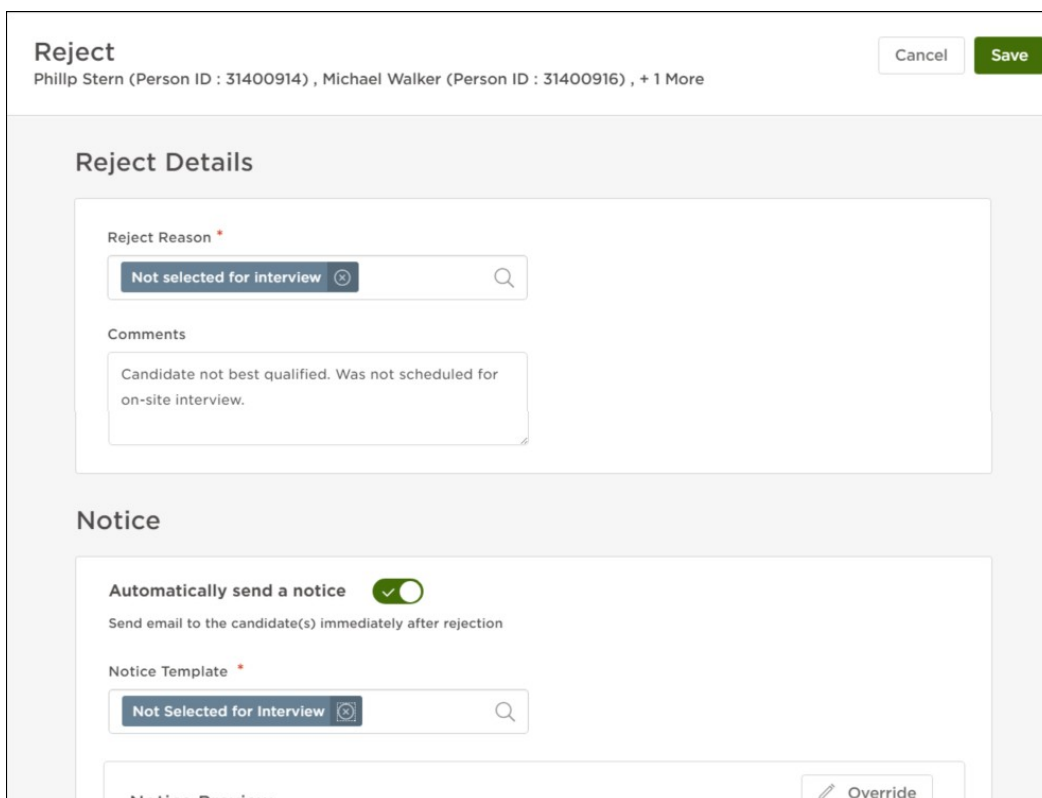
Showing 1 - 3 of 3 items

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.

Note: If you’d prefer to leave this switched off and send all rejected candidates notices at the same time, follow the steps outlined in the upcoming, *Send Rejection Notices in Bulk* section.

8. If you chose to automatically send a notice to the candidate upon rejection, select the proper notice template associated with your rejection reason.
9. If necessary, click **Override** to make a one-time update to the notice prior to sending.



Reject Cancel Save

Phillip Stern (Person ID : 31400914) , Michael Walker (Person ID : 31400916) , + 1 More

Reject Details

Reject Reason *

Not selected for interview

Comments

Candidate not best qualified. Was not scheduled for on-site interview.

Notice

Automatically send a notice

Send email to the candidate(s) immediately after rejection

Notice Template *

Not Selected for Interview

Notice Preview Override

10. Once finished, click **Save**.
11. Repeat these steps for any remaining rounds of rejected candidates.

Send Rejection Notices in Bulk in the OHC

If you've rejected all applicable candidates for various reasons but haven't yet sent them notices, you can do so in bulk.

Steps to Send Rejection Notices in Bulk in the OHC

1. If you're not already viewing the referred list of candidates, return to the **My Candidates** section on the dashboard. From the **My Candidates** section, click the referred list by selecting the requisition in the **Requisition Title** column.

| 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 |

2. Click **Rejected** on either the **doughnut chart** or on the **Candidates** menu.
3. Select all candidates that will receive rejection notices.
4. On the **Actions** menu, click **Reject**.

| Name | Requisition Title | Notices | Master Profile | Status |
|-------------------|-------------------|---------|----------------|---------------------------------------|
| Blackburn, Gordon | 09/29/2017 | -- | | Rejected Interviewed but not selected |
| Cole, Linda | 09/29/2017 | -- | | Rejected Not best qualified |
| Newman, Carla | 09/29/2017 | -- | | Rejected Interviewed but not selected |
| Ortman, Julie | 09/29/2017 | -- | | Rejected Interviewed but not selected |
| Palmer, Mark | 09/29/2017 | -- | | Rejected Not best qualified |

5. A list of notice templates will display based on the reject reason selected. Verify that the correct template is selected at this time.

| REJECT REASON | TEMPLATE | ACTIONS |
|--|------------|------------------|
| No show for interview 1 Applicants | [Dropdown] | Override Preview |
| Not best qualified 3 Applicants | [Dropdown] | Override Preview |
| Interviewed but not selected 4 Applicants | [Dropdown] | Override Preview |

- 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.

| REJECT REASON | TEMPLATE | ACTIONS |
|--|------------------------------|------------------|
| No show for interview 1 Applicants | No Show for Interview | Override Preview |
| Not best qualified 3 Applicants | Not Best Qualified | Override Preview |
| Interviewed but not selected 4 Applicants | Interviewed But Not Selected | Override Preview |

- Once finished, click **Send**.

Steps to Make an Offer

- If you're not already viewing the referred list of candidates, return to the **My Candidates** section on the dashboard. From the **My Candidates** section, click the referred list.

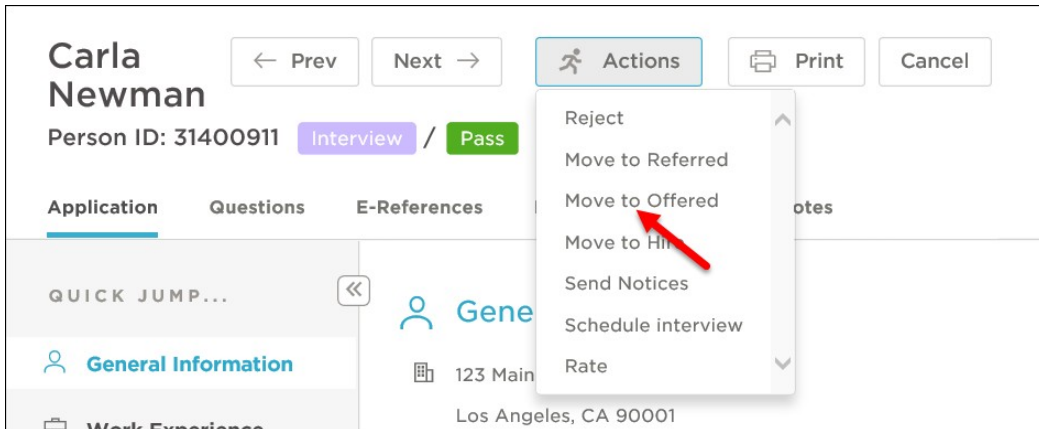
| Req # | Requisition Title | Candidates | Department | Division | Hiring Manager | Created On |
|-------|--------------------------|------------|-----------------|----------------|----------------|------------|
| 00002 | Human Resources Analyst | 9 | Human Resources | Administration | Jason Hanna |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

Showing 1 - 2 of 2 items

- 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.
- Click the name of the candidate to receive the offer.

| Name | Action Date | Notices | Master Profile | Status | Rating |
|-------------------|-------------|---------|----------------|---|-------------|
| Blackburn, Gordon | 05/08/2017 | -- | Person Icon | Interview Scheduled for 10/17/2017 1... | Fail 60.00% |
| Newman, Carla | 05/08/2017 | -- | Person Icon | Interview Scheduled for 10/19/2017 1... | Pass 90.00% |
| Ortman, Julie | 05/08/2017 | -- | Person Icon | Interview Scheduled for 10/17/2017 2... | Pass 75.00% |
| Palmer, Mark | 05/08/2017 | -- | Person Icon | Interview Scheduled for 10/19/2017 1... | Pass 85.00% |

- On the **Actions** menu, click **Move to Offered**.



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

A screenshot of the 'Make Offer' form for Carla Newman (Person ID: 31400911). The form has a 'Cancel' button and a 'Save & Submit' button, which is circled in red. The form contains several input fields: 'Offer Date' with a calendar icon and the value '10/24/2017'; 'Offer Amount' with a dollar sign and the value '50000.00'; 'Bonus Amount' with a dollar sign and an empty field; and a 'Comment' field with an empty text area.

6. Once finished, click **Save & Submit**.

Steps to Hire a Candidate

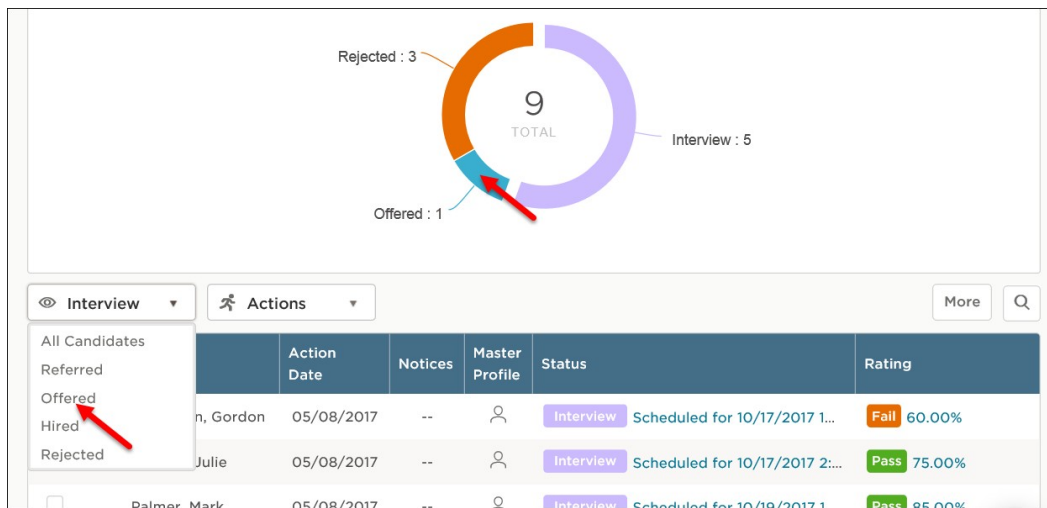
1. If you're not already viewing the referred list of candidates, return to the **My Candidates** section on the dashboard. From the **My Candidates** section, click the referred list in the **Requisition Title** column.

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.



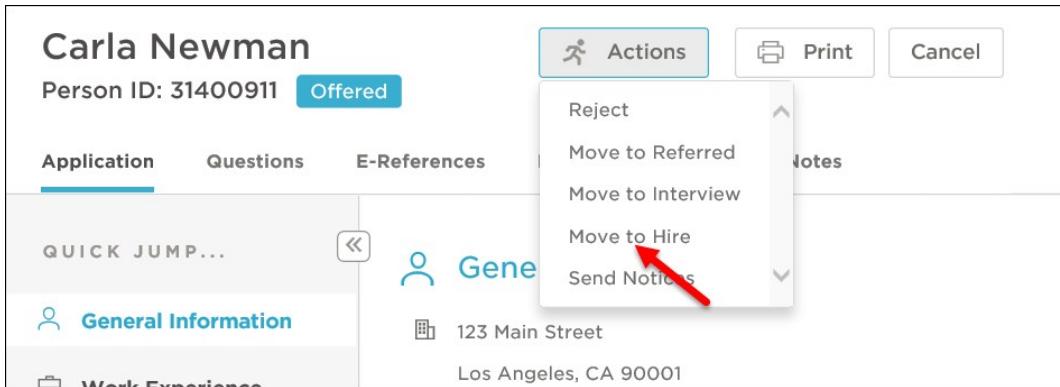
3. Click the name of the candidate to hire.

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

A screenshot of the 'Hire Form' for 'Carla Newman (Person ID : 31400911)'. The form is divided into three steps: '1. HIRE INFORMATION', '2. APPROVALS', and '3. ATTACHMENTS'. The 'Hire Information' section contains the following fields:

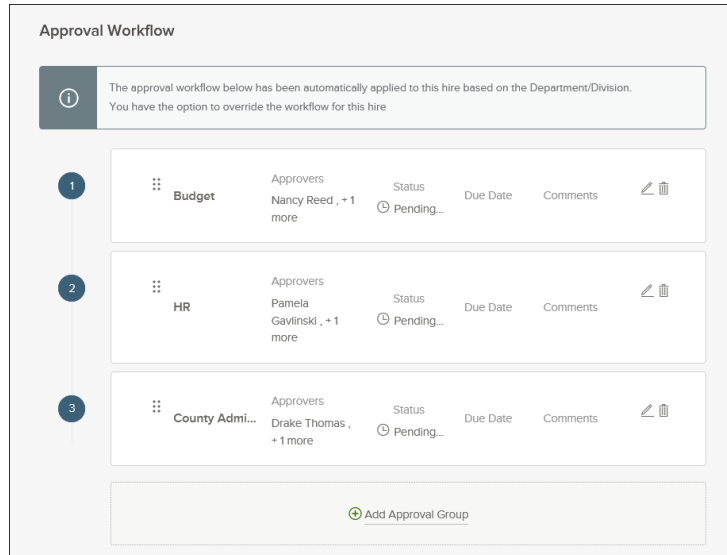
- Offer Date *: 10/24/2017
- Date Offer Accepted *: 10/25/2017
- Offer Amount: \$ 50000.00
- Bonus Amount: \$
- Start Date *: 11/01/2017
- Orientation Date: 11/01/2017
- Filled Date: 10/25/2017
- Active On Eligible List?:
- Comment: [Empty text box]


The 'Save & Continue to next Step' button is circled in red. There is also a 'Save & Close' button.

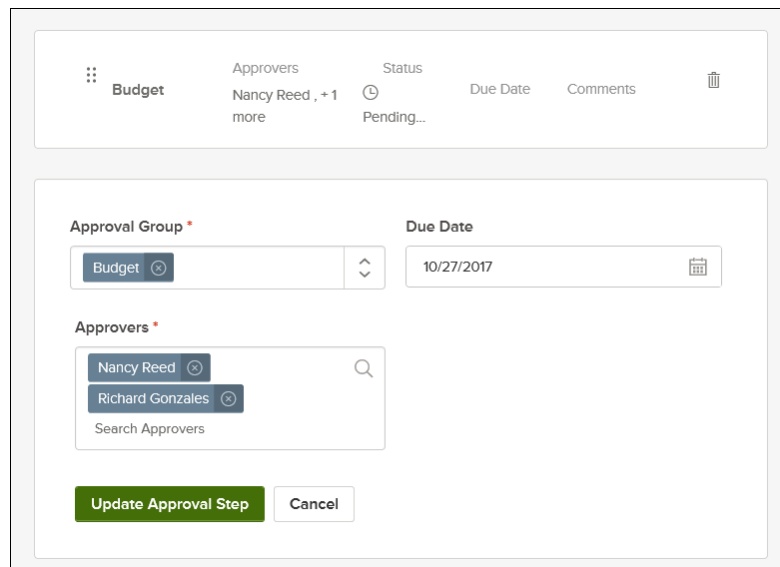
6. Once finished, click **Save & Continue to Next Step**.

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**.

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

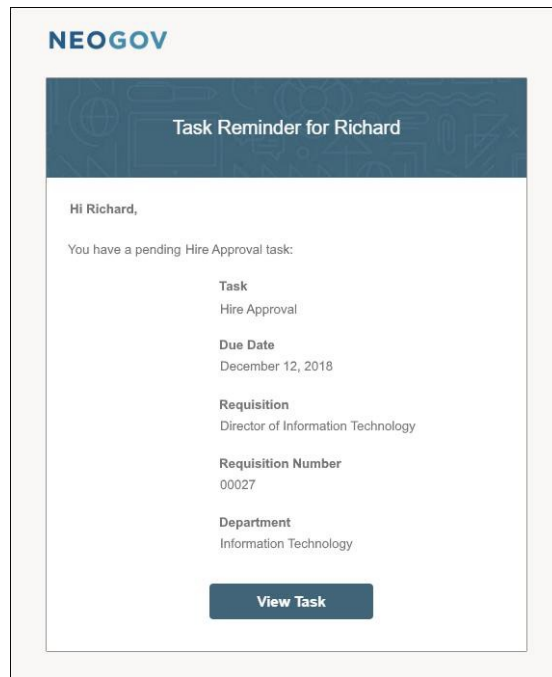


- If you prefer to keep the assigned approver(s) reminded about the approval task with a due date, click , enter a due date and then click **Update Approval Step**.




- Repeat these steps for all remaining approval steps that require due dates.

Note: The assigned approver(s) will receive a reminder email from info@neogov.com, with the subject line, NEOGOV OHC Task Reminder, on the due date and each day the approval task is past due until the task is completed. The reminder email will include a View Task button, guiding the approver(s) to the task requiring attention.

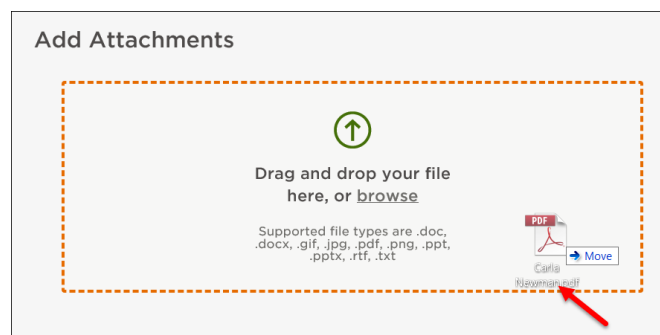


10. If a template for your agency/division does not exist, you will be prompted to create an approval workflow. You have two options: (1) create an approval workflow or (2) skip the approval workflow and click **Save & Continue to Next Step**. To create an approval workflow, follow the step under the Create an Approval Workflow section.

Create an Approval Workflow

- a. Click the **+Add Approval Group** link.
- b. On the **Approval Group** pulldown, click the applicable approval group.
- c. Enter a Due Date in the due Date field (optional).
- d. From the **Approvers** field, click  and select the applicable approver(s).
- e. Click **Add Approval Step**.
- f. Click **+Add Approval Group** and repeat these steps for the remaining approval steps.
- g. Once you've finished, click **Save & Continue to Next Step**.

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

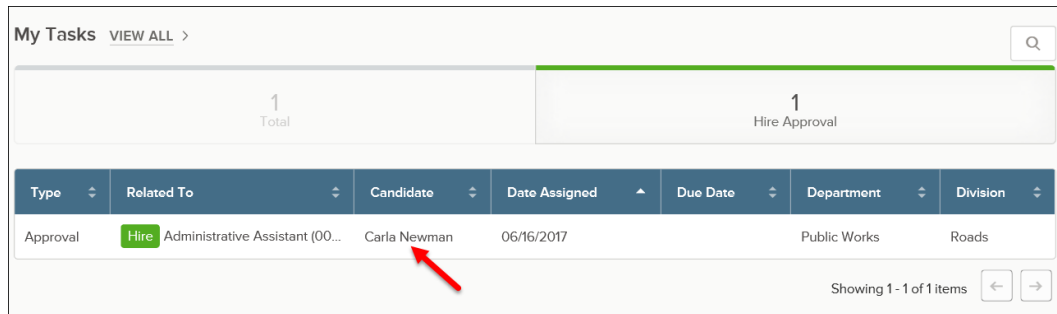


Steps to Approve a Hire

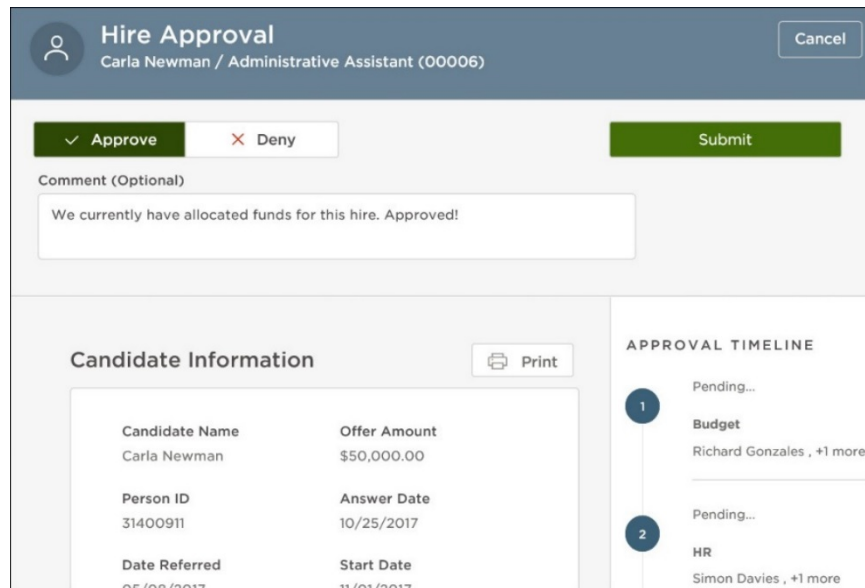
1. If you're not already viewing your dashboard page, click **Dashboard** in the upper left corner.



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



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



4. If a workflow approval process is established, the hire must be approved by all groups and sent to HR for final approval.

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.

The screenshot shows a web interface for a hire approval process. At the top, it says "Hire Approval" and "Carla Newman / Administrative Assistant (00006)". There are buttons for "Approve", "Deny", and "Submit". Below these are fields for "Send Back to Step" (set to "HiringManager") and "Comment (Optional)" with a text area containing a message about a position justification report. At the bottom, there is a "Candidate Information" table and an "APPROVAL TIMELINE" section.

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

APPROVAL TIMELINE

- 05/08/2017 by Richard Gonzales
- Budget

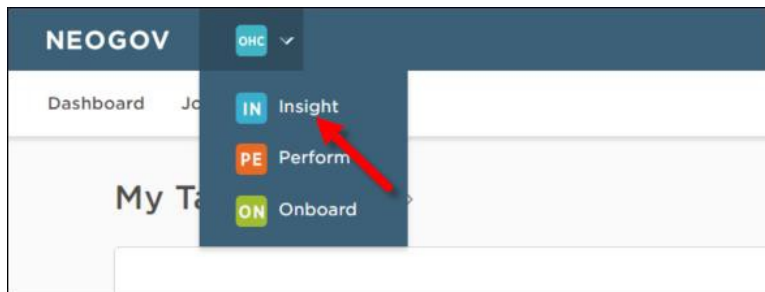
Module 8: Authorize a New Hire and Fill a Requisition — Insight

In the previous training module, you completed the hiring, interviewing and new hire tasks in the Online Hiring Center. When the new hire task is completed, an email notification will be sent to the assigned analyst of the requisition regarding the new hire.

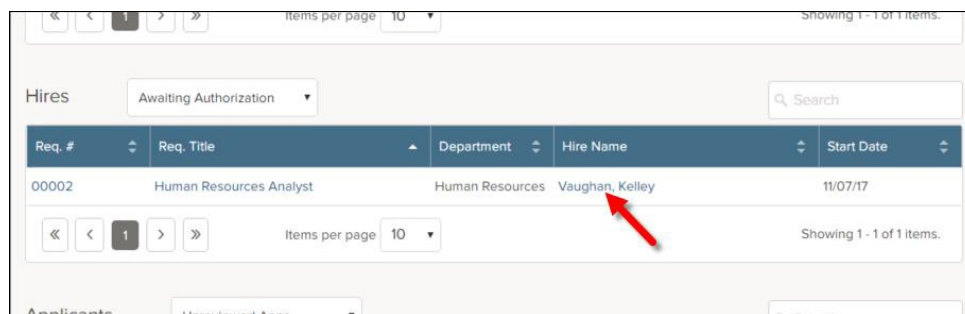
For this training module, you will be performing two close out tasks: authorizing the new hire and filling the requisition.

Steps to Authorize a New Hire and Fill a Requisition

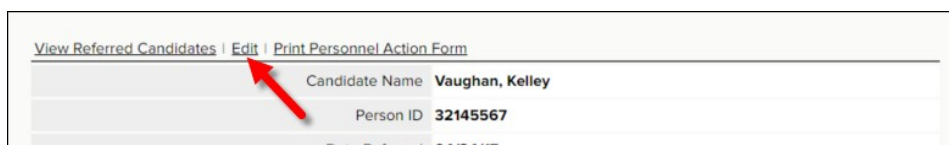
1. If you're not already in Insight, return to Insight by selecting **Insight** on the **NEOGOV Product menu**.



2. The recently-hired candidate displays from the **Hires** section on your **My HR** page. Click the name of the candidate.



3. The personnel action form will display. Review the form and then click **Edit** to start the authorization process.



- Click **Save and Authorize**.

Orientation Date: 11/08/17

Keep Active on Eligible List: No

Comments: 2500 character limit

Approvals: None

Final Authorization: Awaiting authorization

Save Save and Authorize

- An approval confirmation will display.

Start Date: 11/07/17

Orientation Date: 11/08/17

Keep Active on Eligible List: No

Comments:

Approval Status: Authorized on 11/01/17 9:36 AM by Jason Hanna

Attachments: Add New

| Attachment Title | Date Uploaded | File Name | Action |
|------------------|---------------|-----------|--------|
|------------------|---------------|-----------|--------|

- Now it's time to change the requisition's status from open to filled. Return to your exam plan. Click the exam number **My HR** page, or on the **Jobs** menu, click **Exam Plans** and then click the **job title** from the **Exam Plan** column.
- From the **Requisitions** section, click **Authorize** from.

Requisitions Add New

| Req # | Title | Department | Date Created | Action |
|-------|-------------------------|-----------------|--------------|---------------------------------------|
| 00002 | Human Resources Analyst | Human Resources | 04/15/2017 | Edit Authorize Disassociate Referrals |

Tasks Add New

| Subject | Status | Priority | Due Date | Assigned To | Action |
|---------|--------|----------|----------|-------------|--------|
|---------|--------|----------|----------|-------------|--------|

Notes Add New

- Select **Filled** from the **Status** pulldown.

* Required

* Status: Filled

* Analyst: Hanna, Jason

Existing Exam Plan:

Comments:

9. Once you've finished, click **Save**.

Note: The last few steps involve updating the candidate status messages for both eligible and referred lists. These steps can be omitted if you did not input status messages during the posting process.

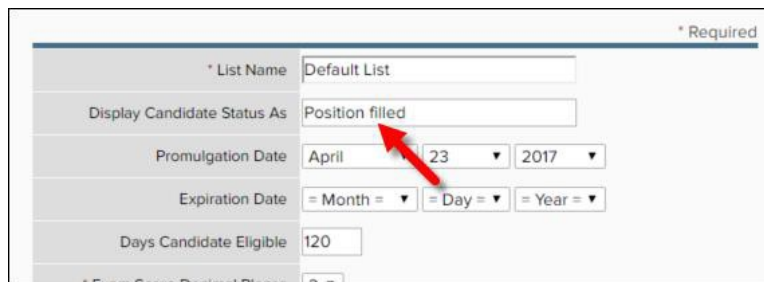
10. From the **Eligible Lists** section, click **Edit**.



| List Name | List Type | Expiration Date | # On List Total | Active | Action |
|--------------|-----------|-----------------|--------------------|--------|--|
| Default List | Regular | N/A | 5 | 4 | Edit View Candidates Audit Trail |

| Req # | Title | Department | Date Created | Action |
|-------|-------------------------|-----------------|--------------|--|
| 00002 | Human Resources Analyst | Human Resources | 04/15/2017 | Edit Authorize Disassociate Referred |

11. Change the **Display Candidate Status As** field value to, "Position filled," or something similar.



* Required

* List Name: Default List

Display Candidate Status As: Position filled

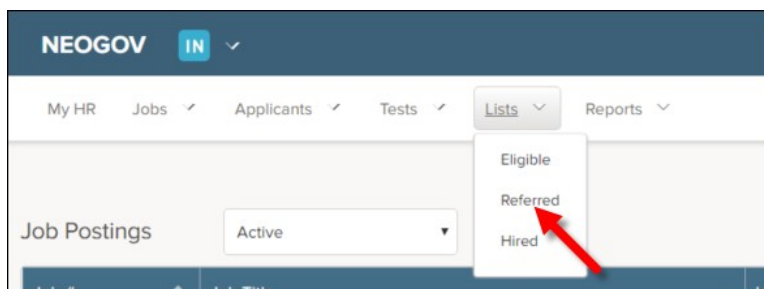
Promulgation Date: April 23, 2017

Expiration Date: = Month = Day = Year =

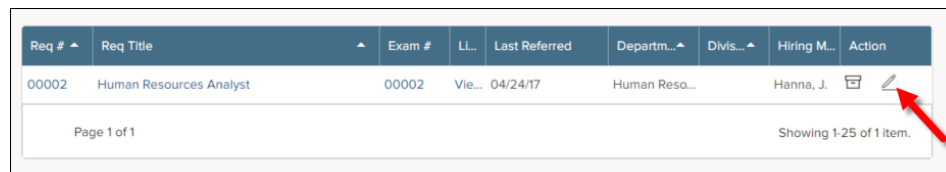
Days Candidate Eligible: 120

12. Once you've finished, click **Save**.

13. Now update the same field for the referred list by clicking **Referred** on the **Lists** menu.



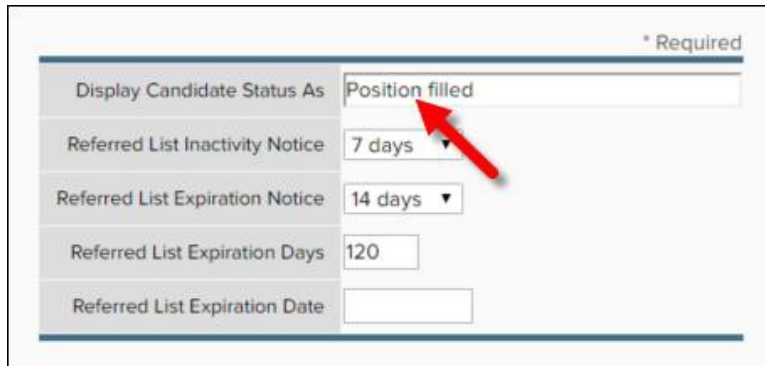
14. From the **Action** column, click the **Edit** icon. It looks like a pencil.



| Req # | Req Title | Exam # | LL | Last Referred | Departm... | Divis... | Hiring M... | Action |
|-------|-------------------------|--------|--------|---------------|---------------|----------|-------------|--------|
| 00002 | Human Resources Analyst | 00002 | Vie... | 04/24/17 | Human Reso... | | Hanna, J. | |

Page 1 of 1 Showing 1.25 of 1 item.

15. Change the **Display Candidate Status As** field value to, “Position filled,” or something similar.



A screenshot of a configuration form with a light gray background and a blue border. The form contains several fields with labels on the left and input areas on the right. The fields are: 'Display Candidate Status As' with a text input containing 'Position filled'; 'Referred List Inactivity Notice' with a dropdown menu showing '7 days'; 'Referred List Expiration Notice' with a dropdown menu showing '14 days'; 'Referred List Expiration Days' with a text input containing '120'; and 'Referred List Expiration Date' with an empty text input. A red arrow points to the 'Position filled' text in the first field. In the top right corner of the form, there is a small asterisk followed by the word 'Required'.

| | * Required |
|---------------------------------|-----------------|
| Display Candidate Status As | Position filled |
| Referred List Inactivity Notice | 7 days |
| Referred List Expiration Notice | 14 days |
| Referred List Expiration Days | 120 |
| Referred List Expiration Date | |

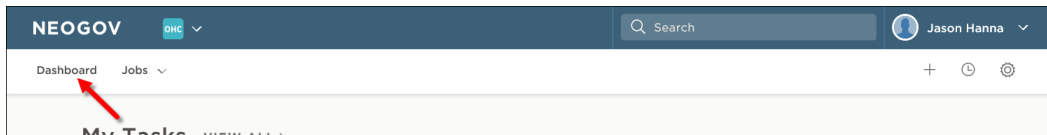
16. Once finished, click **Save**.

Print Applications

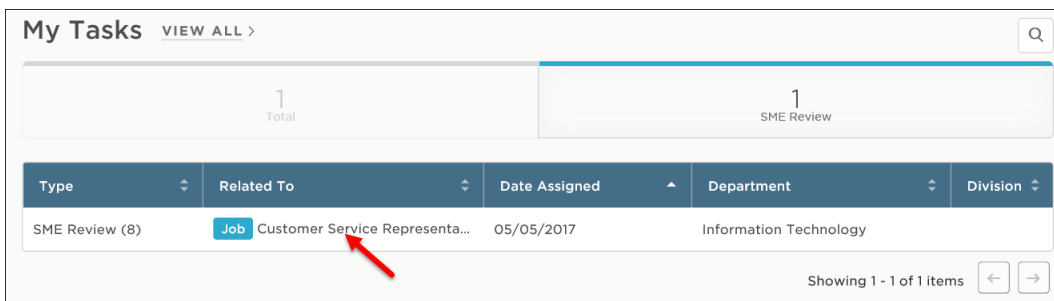
Users with the OHC roles of SME, Rater, Hiring Manager or HR Liaison can print applications from the OHC.

Steps to Print Applications

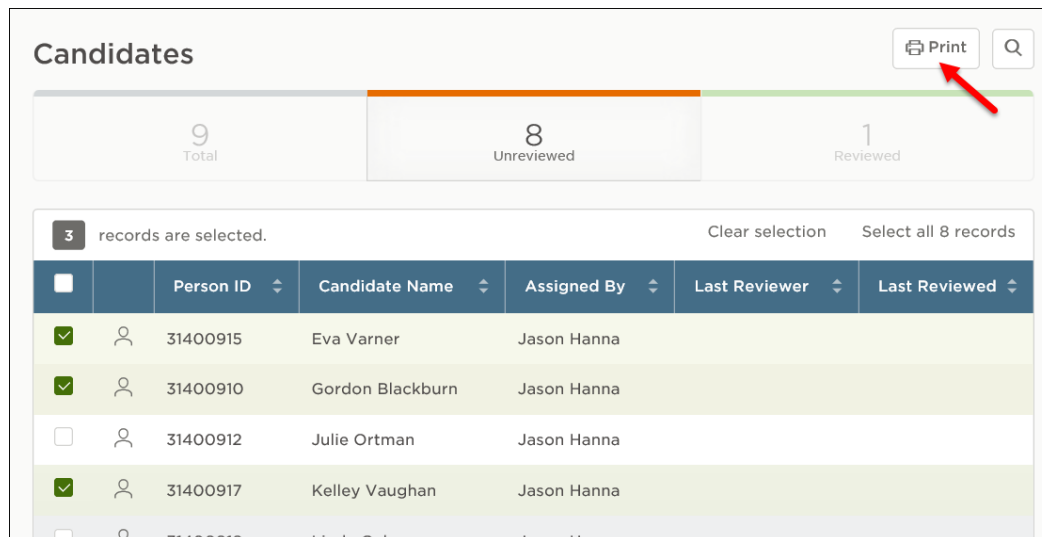
1. If you're not already viewing your dashboard page, click **Dashboard** in the upper left corner.



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.

| 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**.

| Action | Notices | Master Profile | Status |
|------------|---------|----------------|-----------------|
| 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**.

| Name | Action Date |
|-------------------|-------------|
| Blackburn, Gordon | 05/08/2017 |
| Cole, Linda | 05/08/2017 |
| Newman, Carla | 05/08/2017 |
| Ortman, Julie | 05/08/2017 |
| Palmer, Mark | 05/08/2017 |
| Stern, Phillip | 05/08/2017 |
| Varnier, Eva | 05/08/2017 |
| Vaughan, Kelley | 05/08/2017 |

Print Applications

Cancel Continue

You've selected 5 applications to print.

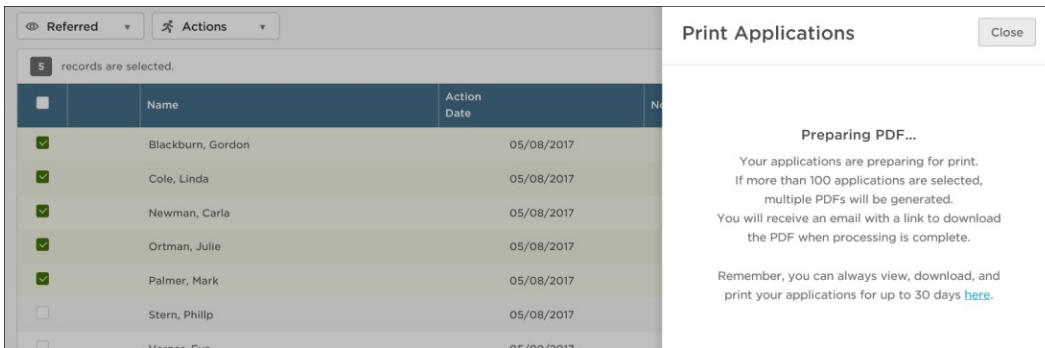
Print Options

Print Applications Now
Limited to a maximum of 25 applications. Preview and print applications directly from your browser.

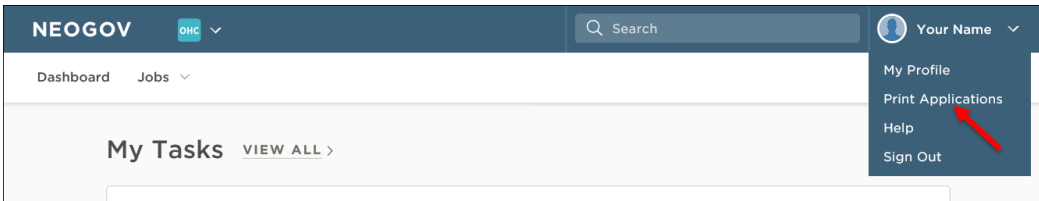
Create PDF with Applications
A PDF will be generated and you will be notified via email when it is ready to download.

Create PDF with Applications and Attachments
A PDF will be generated and you will be notified via email when it is ready to download.

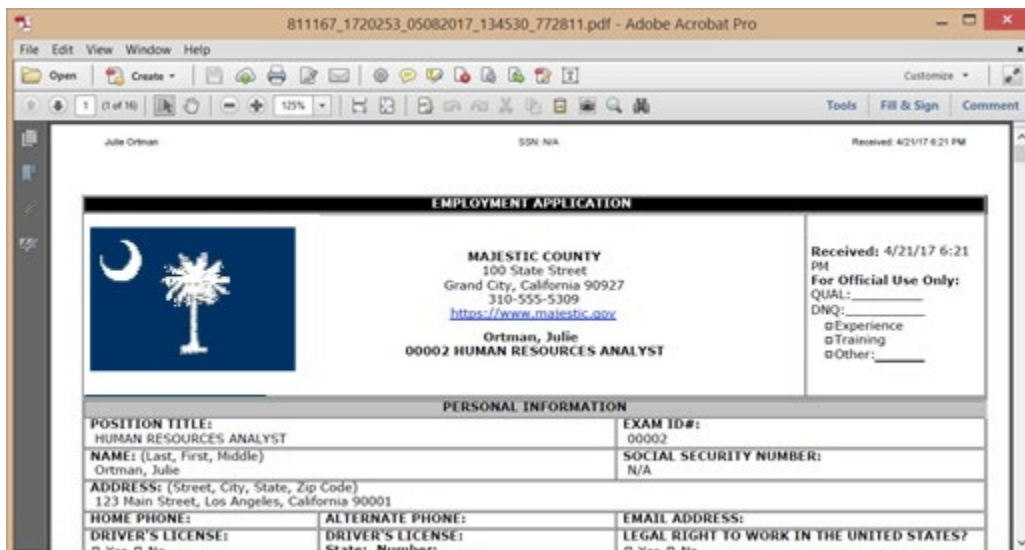
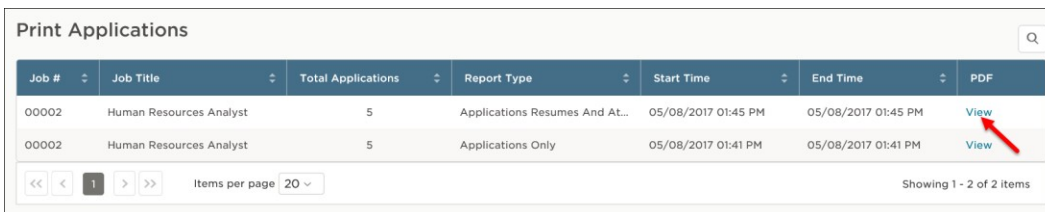
- If you selected either PDF download option, a confirmation window will display. You'll receive an email from support@neogov.com once your PDF is ready for download.



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



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



Advanced Filtering

Filters allow Insight 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.

Filters are divided up into two major categories: Evaluation Step Filters and Eligible List Filters.

Evaluation Step Filters

Evaluation Step Filters are those filters you use to search for candidates while they are within your Exam Plan's Evaluation Steps. These filters can be as simple or complex as you need and can span across multiple search elements.

Search elements for Evaluation Step Filters include:

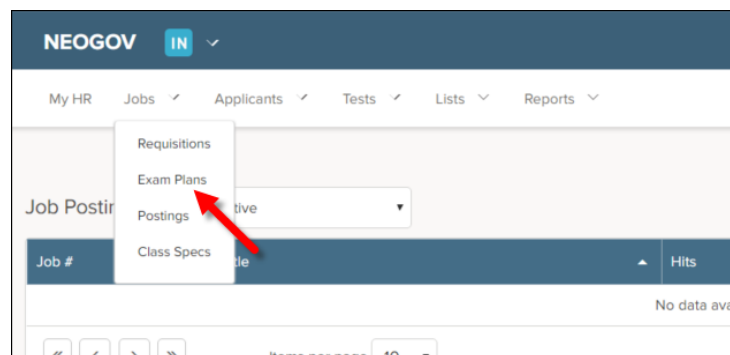
- Applicant Master Profile
- Application
- Agency-Wide Questions
- [Job-Specific] Supplemental Questions
- Applicant Step

Create and Apply an Evaluation Step Filter

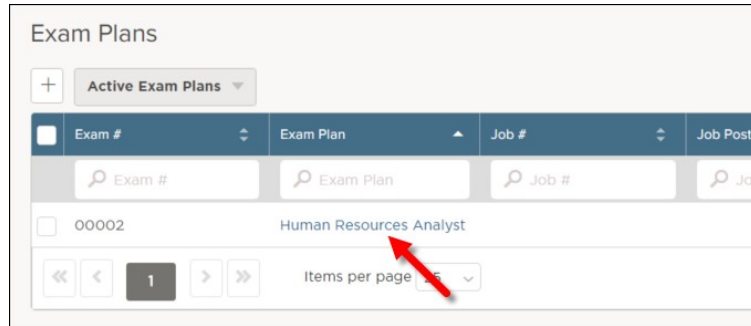
You have one of two paths to add an Evaluation Step Filter. You can create an evaluation step filter from the exam plan or the View Applicants by Step when working with the candidate records.

Create an Evaluation Step Filter from the Exam Plan

1. Access the exam plan in Insight by selecting the **Jobs** menu and clicking **Exam Plans**.



- From the **Exam Plan** column, click the **job title**.



- The **Exam Plan Detail** page is displayed. Select the **Add Evaluation Step Filter** link

[Advanced Filters](#) [Add Evaluation Step Filter](#) [Add Eligible List Filter](#)

| Title | Created By | Filter Type | Action |
|--|--------------|------------------------|---|
| (85% or above on written) OR (72% or above on written and a CFM certification) | Evan Oderman | Evaluation Step Filter | View Edit Delete Share |
| Minimum Qualifications | Evan Oderman | Evaluation Step Filter | View Edit Delete Un-share |
| Seattle and nights and weekends | Evan Oderman | Eligible List Filter | View Edit Delete Share |
| Transfer Candidates | Evan Oderman | Evaluation Step Filter | View Edit Delete Share |

- The **Add/Edit Filter** page will display.

[Back To Exam Plan](#)

Fields marked with an asterisk (*) are required

*Name:

Share Filter:

[Add Group](#)

| Delete | Object | Field | Operator | Value |
|--------------------------|------------|------------|------------|----------------------|
| <input type="checkbox"/> | Select One | Select One | Select One | <input type="text"/> |

[Add Condition](#)

5. Complete the form using the table below.

* Required

| Field | What to Enter |
|--------------|--|
| * Name | Input a descriptive name. |
| Share Filter | Click to place a check mark in the box if you wish to share your filter. Sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans. |
| Object | Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions to specify from where the data will be pulled. |
| Field | Select the field on which your search condition will be based. You will see applicable fields depending on which Object you have selected. |
| Operator | Select the function that yields the records that you're expecting to see. <ul style="list-style-type: none"> • Begins with – Where values that start with a specific string of text are found in result. • Contains (IN) – Where any value selected is found in result. • Contains All – Where all values selected are found in result. • Does Not Contain (Not IN) – Where value specified is not included in result. • Equal (=) – Where result is an exact match. • Equal Field (=) - <i>Not in use at this time.</i> • Not Equal (<>) - Where value is not found in result. • Not Equal Field (<>) – <i>Not in use at this time.</i> |
| Value | Input the field value for which you're basing your search. |

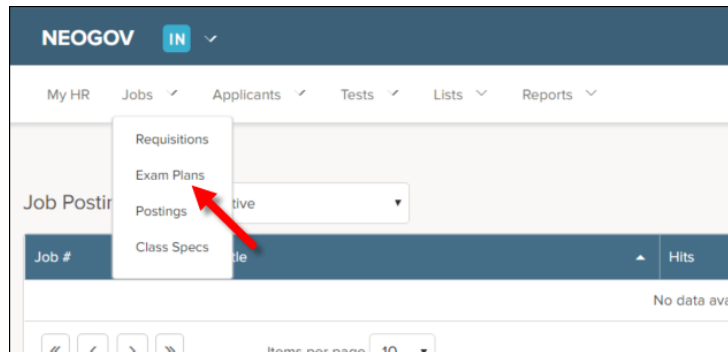
6. If your filter only contains one search condition, click **Save**; however, if you would like to refine your search, add additional condition lines by click **Add Condition**.
7. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

Note: If your filter is advanced and requires combining AND and OR condition lines, then click **Add Group**.

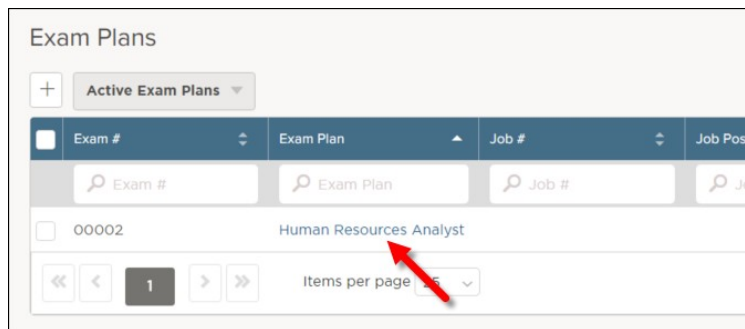
8. Once you have completed your entire filter statement, click **Save**.
9. You will return to the **Exam Plan Detail** page. To apply the filter, select the **View Applicants by Step** link and follow steps 4 and 5 in the *Create an Evaluation Step from the View Applicants by Step Page* section below.

Create an Evaluation Step from the View Applicants by Step Page

1. Access the exam plan in Insight by selecting the **Jobs** menu and clicking **Exam Plans**.



2. From the **Exam Plan** column, click the **job title**.



3. Select the **View Applicants by Step** link.



| Step | Evaluation Step | Weight | Results | At Step | Action |
|--------|---|--------|------------------------------|---------|---|
| Step 1 | Application Received | N/A | View Results | 2 | Edit Audit Trail |
| Step 2 | Training and Experience | N/A | View Results | 20 | Edit Delete Audit Trail |

Navigation links: [Evaluation Steps](#) [Add Step](#) [View Applicants \(98\)](#) [View Applicants by Step \(22\)](#) [App Flow](#) [Print Apps](#)

4. From the **View Applicants by Step** page, select **Advanced Filter** from the **Select Action** drop down, choose candidate(s) from the **Select Candidates(s)** drop down, and click **Go**.

[Step History](#) [Step Comments](#) [SME step comments report](#)

| <input type="checkbox"/> | Candidate | Person ID | Master Profile | Disposition | SME | Email Notify | Source | Received | Notices | Audit Trail | Unsubscribed |
|--------------------------|---------------------------|---------------------------|--------------------------------|-----------------------------|---------------------|------------------------------|------------------------|--------------------------|-------------------------|-----------------------------|------------------------------|
| <input type="checkbox"/> | | 25858928 | View | • N/A | | • | Online | 09/30/15 07:49 PM | N/A | View | |
| <input type="checkbox"/> | | 14810974 | View | • N/A | | • | Online | 10/05/15 08:27 PM | N/A | View | |
| <input type="checkbox"/> | | 3940771 | View | • N/A | | • | Online | 10/12/15 09:29 AM | N/A | View | |
| <input type="checkbox"/> | | 9365918 | View | • N/A | | • | Online | 10/09/15 09:07 AM | N/A | View | |
| <input type="checkbox"/> | | 3001506 | View | • N/A | | • | Online | 10/01/15 07:47 AM | N/A | View | |
| <input type="checkbox"/> | | 3944505 | View | • N/A | | • | Online | 10/06/15 11:33 AM | N/A | View | |
| <input type="checkbox"/> | | 8178099 | View | • N/A | | • | Online | 10/05/15 02:39 PM | N/A | View | |
| <input type="checkbox"/> | | 24635737 | View | • N/A | | • | Online | 10/01/15 12:28 AM | N/A | View | |
| <input type="checkbox"/> | | 6354021 | View | • N/A | | • | Online | 10/12/15 02:08 PM | N/A | View | |
| <input type="checkbox"/> | | 25437822 | View | • N/A | | • | Online | 10/12/15 01:28 AM | N/A | View | |
| <input type="checkbox"/> | | 3939930 | View | • N/A | | • | Online | 10/14/15 02:43 PM | N/A | View | |
| <input type="checkbox"/> | | 2432155 | View | • N/A | | • | Online | 10/13/15 11:06 AM | N/A | View | |
| <input type="checkbox"/> | | 18722421 | View | • N/A | | • | Online | 10/04/15 03:15 PM | N/A | View | |
| <input type="checkbox"/> | | 5273263 | View | • N/A | | • | Online | 10/01/15 11:20 PM | N/A | View | |
| <input type="checkbox"/> | | 21834105 | View | • N/A | | • | Online | 10/08/15 09:20 PM | N/A | View | |
| <input type="checkbox"/> | | 5514863 | View | • N/A | | • | Online | 10/07/15 07:07 PM | N/A | View | |
| <input type="checkbox"/> | | 25956270 | View | • N/A | | • | Online | 10/06/15 04:20 PM | N/A | View | |
| <input type="checkbox"/> | | 4790300 | View | • N/A | | • | Online | 10/14/15 01:49 PM | N/A | View | |
| <input type="checkbox"/> | | 26066130 | View | • N/A | | • | Online | 10/12/15 04:44 PM | N/A | View | |
| <input type="checkbox"/> | | 15070650 | View | • N/A | | • | Online | 10/01/15 07:59 AM | N/A | View | |

20 Records Page: 1 of 1 Found

1
 2
 3

[View Exam Plan](#) [Eligible List\(s\)](#)

5. On the Advanced filters page, click **Add Filter** to create a new filter.

6. The **Add/Edit Filter** page will display.

[Back to Filters](#) Fields marked with an asterisk (*) are required

*Name:

Share Filter:

Add Group

| Delete | Object | Field | Operator | Value |
|--------------------------|-------------------------------|---|---|---|
| <input type="checkbox"/> | Add Condition | <input type="text" value="Select One"/> | <input type="text" value="Select One"/> | <input type="text" value="Select One"/> |

7. Complete the form using the table below.

* Required

| Field | What to Enter |
|--------------|---|
| * Name | Input a descriptive name. |
| Share Filter | Click to place a check mark in the box if you wish to share your filter. Sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans. |
| Object | Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions to specify from where the data will be pulled. |
| Field | Select the field on which your search condition will be based. You will see applicable fields depending on which Object you have selected. |
| Operator | Select the function that yields the records that you're expecting to see. <ul style="list-style-type: none"> • Begins with – Where values that start with a specific string of text are found in result. • Contains (IN) – Where any value selected is found in result. • Contains All – Where all values selected are found in result. • Does Not Contain (Not IN) – Where value specified is not included in result • Equal (=) – Where result is an exact match. • Equal Field (=) - <i>Not in use at this time.</i> • Not Equal (<>) - Where value is not found in result. • Not Equal Field (<>) – <i>Not in use at this time.</i> |
| Value | Input the field value for which you're basing your search. |

Note: You can apply an existing filter to the evaluation step by choosing the **Apply** link for the filter.

8. If your filter only contains one search condition, click **Save**; however, if you would like to refine your search, add additional condition lines by click **Add Condition**.
9. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

Note: If your filter is advanced and requires combining AND and OR condition lines, then click **Add Group**.

10. Once you have completed your entire filter statement, click **Save**.
11. Upon saving, you are returned to the **Advanced Filters** page, which allows you to apply, view or edit your Evaluation Step filter; click **Apply**.
12. Your filter will be applied, and **THIS STEP IS FILTERED** will appear on the **View Applicants by Step** page.

Eligible List Filters

Once some candidates move through your evaluation steps and on to the eligible list, Eligible List Filters can then be utilized. Because Evaluation Step Filters and Eligible List filters share the same setup tool, the process to create these two types of filters is exactly the same. Like Evaluation Step Filters, Eligible List Filters can be as simple or complex as you need and can span across multiple search elements.

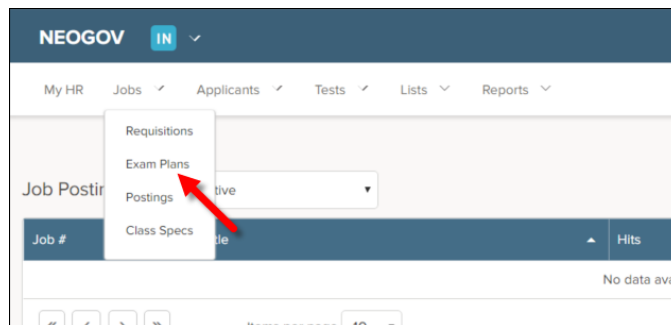
Search elements for Eligible List Filters include:

- Applicant Master Profile
- Application
- Agency-Wide Questions
- [Job-Specific] Supplemental Questions

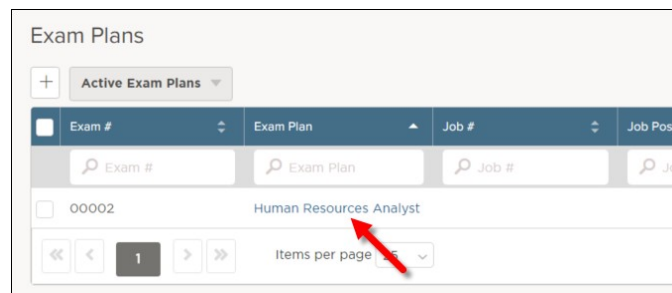
You have one of two paths to add an Eligible List Filter: from the Eligible Candidates page, while you're working with the candidate records, or from the Exam Plan Detail page, the main page for your Exam Plan record. Both paths lead to the final outcome of creating a new eligible list filter.

Create an Eligible List Filter from the Eligible Candidates Page

1. Access the exam plan in Insight by selecting the **Jobs** menu and clicking **Exam Plans**.



2. From the **Exam Plan** column, click **the job title**.



- From the **Exam Plan Detail** page, **Eligible Lists** section, click **View Candidates** for an eligible list containing candidate records that require some type of filtering.

| List Name | List Type | Expiration Date | # On List Total | # On List Active | Action |
|--------------|-----------|-----------------|-----------------|------------------|--|
| Default List | Regular | N/A | 76 | 75 | Edit View Candidates Audit Trail |

1 Record Found Page: 1 of 1

- On the **Eligible Candidates** page, from the **Select Action** drop down, select **Advanced Filter** and from the **Select Candidate(s)** drop-down field, select the applicable candidate value to apply your filter (e.g., All Candidates) and click **Go**.

| View | 1 | 0.00 | 1 | 0.00 | 10/04/15 | 10/19/15 | • | Add |
|------|---|------|---|------|----------|----------|---|-----|
| View | 1 | 0.00 | 1 | 0.00 | 10/08/15 | 10/19/15 | • | Add |
| View | 1 | 0.00 | 1 | 0.00 | 09/30/15 | 10/19/15 | • | Add |
| View | 1 | 0.00 | 1 | 0.00 | 10/05/15 | 10/19/15 | • | Add |
| View | 1 | 0.00 | 1 | 0.00 | 10/12/15 | 10/19/15 | • | Add |
| View | 1 | 0.00 | 1 | 0.00 | 10/05/15 | 10/19/15 | • | Add |

Select Action: **Advanced Filter** (1) Select Candidate(s): **All Candidates** (2) **Go** (3)

tip

From here to the point of saving your eligible list filter, it is the same process as creating the evaluation step filter.

- On the Advanced filters page, click **Add Filter** to create a new filter.
- The **Add/Edit Filter** page will display.

[Back to Filters](#) Fields marked with an asterisk (*) are required

*Name:

Share Filter:

Add Group

| Delete | Object | Field | Operator | Value |
|--------------------------|------------|------------|------------|----------------------|
| <input type="checkbox"/> | Select One | Select One | Select One | <input type="text"/> |

[Add Condition](#)

7. Complete the form using the table below.

| Field | What to Enter |
|--------------|--|
| * Name | Input a descriptive name. |
| Share Filter | Click to place a check mark in the box if you wish to share your filter. Sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans. |
| Object | Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions to specify from where the data will be pulled. |
| Field | Select the field on which your search condition will be based. You will see applicable fields depending on which Object you have selected. |
| Operator | Select the function that yields the records that you're expecting to see. <ul style="list-style-type: none"> • Begins with – Where values that start with a specific string of text are found in result. • Contains (IN) – Where any value selected is found in result. • Contains All – Where all values selected are found in result. • Does Not Contain (Not IN) – Where value specified is not included in result. • Equal (=) – Where result is an exact match. • Equal Field (=) - <i>Not in use at this time.</i> • Not Equal (<>) - Where value is not found in result. • Not Equal Field (<>) – <i>Not in use at this time.</i> |
| Value | Input the field value for which you're basing your search. |

* Required

Note: You can apply an existing filter to the evaluation step by choosing the **Apply** link for the filter.

8. If your filter only contains one search condition, click **Save**; however, if you would like to refine your search, add additional condition lines by click **Add Condition**.
9. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

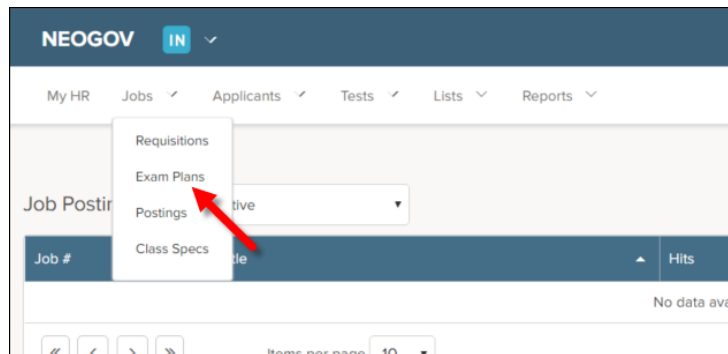
Note: If your filter is advanced and requires combining AND and OR condition lines, then click **Add Group**.

10. Once you have completed your entire filter statement, click **Save**.
11. Upon saving, you are returned to the **Advanced Filters** page, which allows you to apply, view or edit your eligible list filter; click **Apply**.
12. Your filter will be applied, and **Filter returned X records** will appear on the **Eligible Candidates** page.

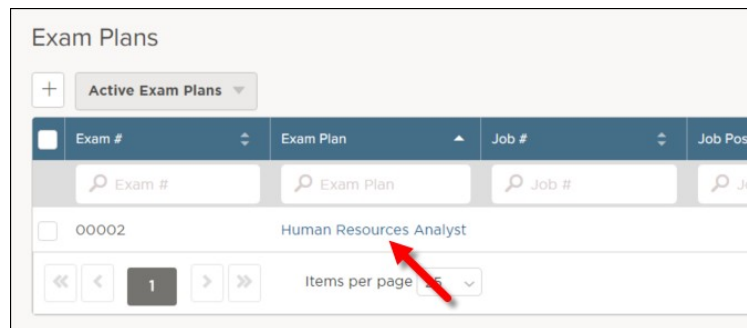
Note: After your candidate records are filtered, you're free to carry on with other tasks, e.g., reactive candidates, apply preference points, send notices, etc.

Create an Eligible List Filter from the Exam Plan Detail Page

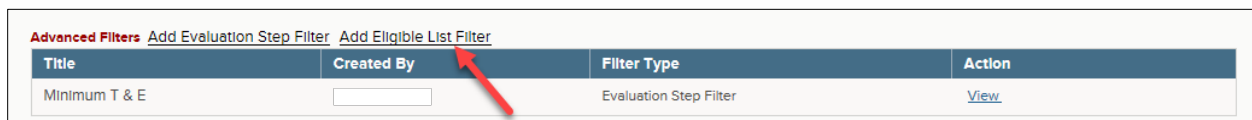
1. Access the exam plan in Insight by selecting the **Jobs** menu and clicking **Exam Plans**.



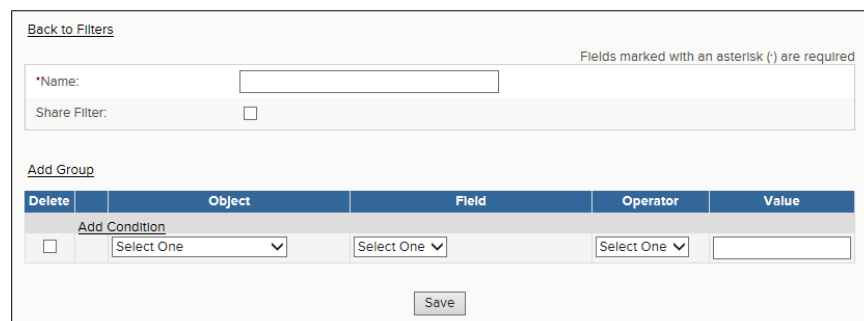
2. From the **Exam Plan** column, click the **job title**.



3. The **Exam Plan Detail** page is displayed. Select the **Add Eligible List Filter** in the **Advanced Filters** section.



4. The **Add/Edit Filter** page will display.

A screenshot of the 'Add/Edit Filter' page. At the top left is a 'Back to Filters' link. A note states 'Fields marked with an asterisk (*) are required'. There is a text input field for '*Name:' and a 'Share Filter' checkbox. Below this is the 'Add Group' section, which is a table with columns: 'Delete', 'Object', 'Field', 'Operator', and 'Value'. The table has one row with 'Add Condition' in the first column, and dropdown menus for 'Object', 'Field', and 'Operator', and a text input for 'Value'. A 'Save' button is at the bottom.

5. Complete the form using the table below.

* Required

| Field | What to Enter |
|--------------|--|
| * Name | Input a descriptive name. |
| Share Filter | Click to place a check mark in the box if you wish to share your filter. Sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans. |
| Object | Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions to specify from where the data will be pulled. |
| Field | Select the field on which your search condition will be based. You will see applicable fields depending on which Object you have selected. |
| Operator | Select the function that yields the records that you're expecting to see. <ul style="list-style-type: none"> • Begins with – Where values that start with a specific string of text are found in result. • Contains (IN) – Where any value selected is found in result. • Contains All – Where all values selected are found in result. • Does Not Contain (Not IN) – Where value specified is not included in result. • Equal (=) – Where result is an exact match. • Equal Field (=) - <i>Not in use at this time.</i> • Not Equal (<>) - Where value is not found in result. • Not Equal Field (<>) – <i>Not in use at this time.</i> |
| Value | Input the field value for which you're basing your search. |

6. If your filter only contains one search condition, click **Save**; however, if you would like to refine your search, add additional condition lines by click **Add Condition**.
7. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

Note: If your filter is advanced and requires combining AND and OR condition lines, then click **Add Group**.

8. Once you have completed your entire filter statement, click **Save**.
9. Upon saving, you're returned to the **Exam Plan Detail** page, which allows you to view, edit, delete or share your eligible list filter.



You can only apply your saved eligible list filter from the **Eligible Candidates** page. You cannot apply the filter from the **Exam Plan Detail** page. To access the **Eligible Candidates** page, click **View Candidates** from the **Exam Plan Detail** page in the **Eligible Lists** section.