

NEOGOV Insight

## Online Hiring Center

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## Online Hiring Center

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### Introduction

The Online Hiring Center (OHC) engages hiring department staff, subject matter experts and approval groups in the recruitment and selection process. The intuitive design of the OHC includes a central dashboard of pertinent tasks and many other great features. This guide will give you a complete overview—based on user role—from creating a requisition to approving a newly-hired candidate. Read on and enjoy using the OHC!

### OHC Roles

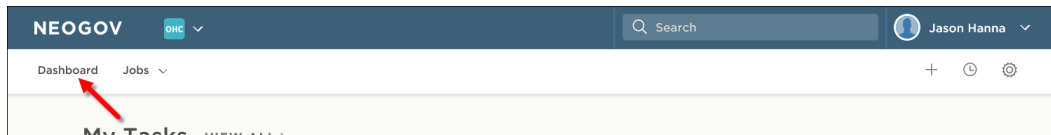
There are six user roles in the OHC: Hiring Manager, Rater, SME, Approver, Originator and HR Liaison. The table below provides details regarding the tasks each role is permitted to complete.

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

## OHC Dashboard

After signing into the OHC your dashboard displays. This is a centralized place of items requiring your attention. In the OHC world, these are your assigned tasks, referred candidates and associated requisitions.

Whenever you need to return back to the dashboard, click Dashboard, from the upper left.

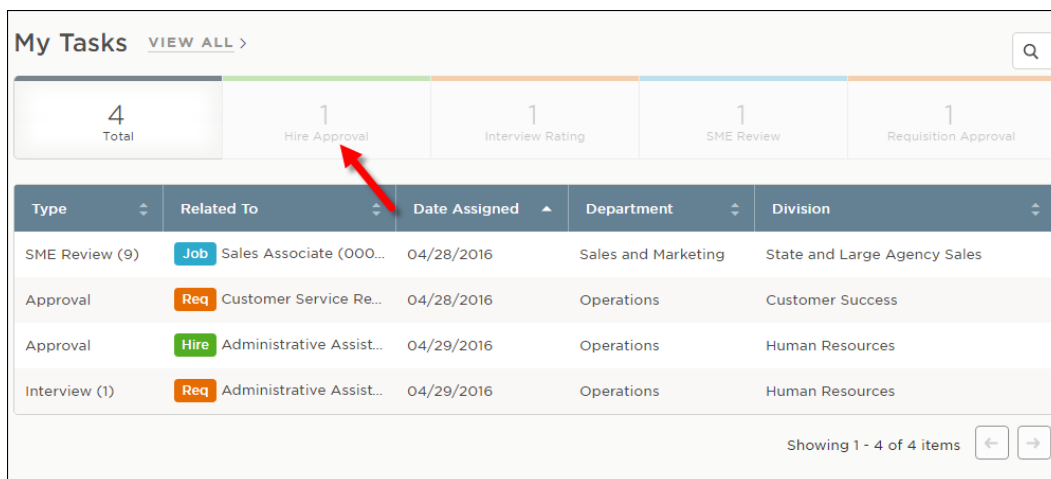


## My Tasks

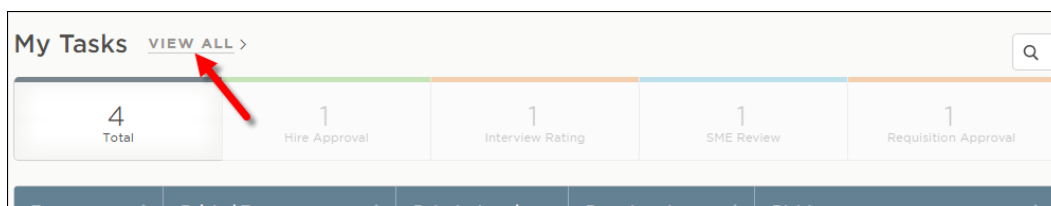
In the My Tasks section, you can have four types of tasks pending your review:

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

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

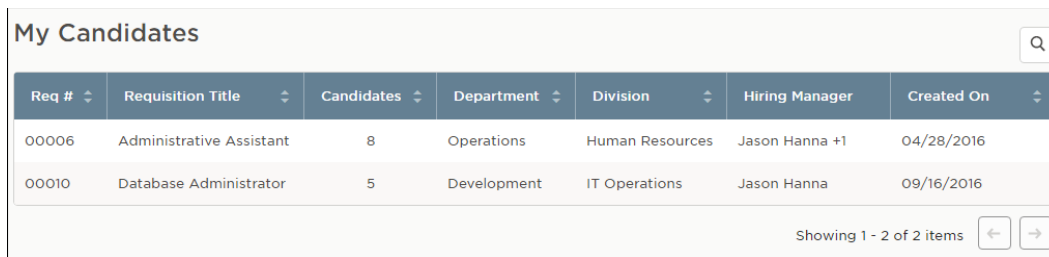


To view all tasks, including completed ones, click VIEW ALL.



## My Candidates

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



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

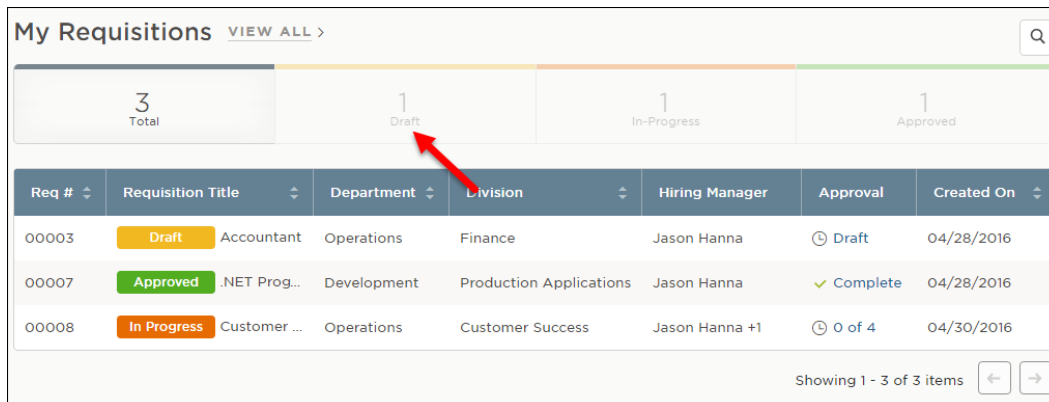
Showing 1 - 2 of 2 items

## My Requisitions

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

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

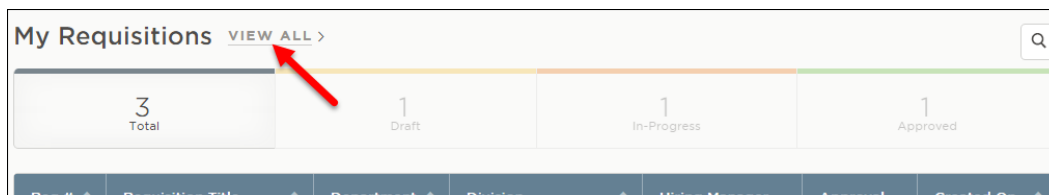
The default view displays all draft, in progress and approved requisitions associated with you. Click one of the color-coded tabs to view a specific requisition type.



Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On
00003	Accountant	Operations	Finance	Jason Hanna	Draft	04/28/2016
00007	.NET Prog...	Development	Production Applications	Jason Hanna	Complete	04/28/2016
00008	Customer ...	Operations	Customer Success	Jason Hanna +1	0 of 4	04/30/2016

Showing 1 - 3 of 3 items

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



Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On
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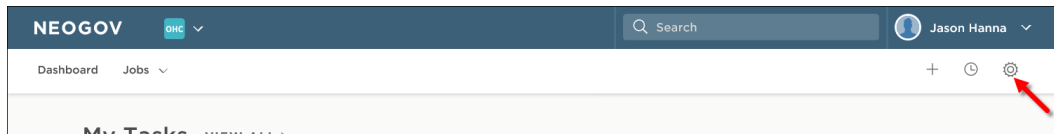
## Customize Global Hire Workflow

In the OHC, candidates on a referred list travel through a total of five preset hire workflow steps including initial referral, interview, offer, hire and rejection. Customize this global workflow if your organization requires modifications to existing steps and/or additional pre and post offer steps.

Required OHC role: With the OHC role of HR Liaison, you can customize the global hire workflow.


### Steps to Customize the Global Hire Workflow

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



2. Click Hire Workflow and click Customize Workflow.

Note: The follow steps feature an example of customizing the global hire workflow where the interview step is changed to a pass/fail evaluation type and a preboarding step is added.

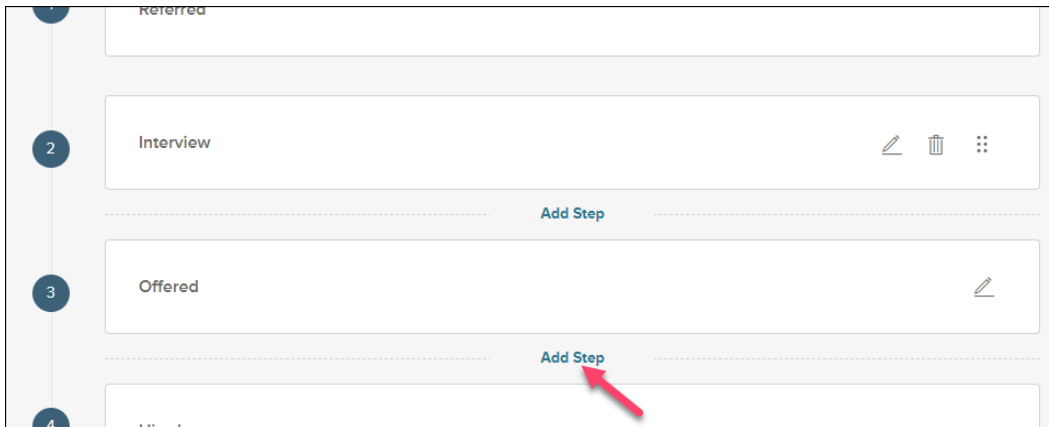
3. From the Interview step, click .
4. Complete modifications to the form. For this example, "Interview With Hiring Manager" is added to the Display Status to Candidate As field and Evaluate Using field is set to Pass/Fail.

A screenshot of the 'Step Details' form in the NEOGOV OHC. The form is titled 'Step Details' and includes a note: '\* required fields are marked with asterisk'. The form has several sections: 'Name \*' with a text input field containing 'Interview'; 'Display Status to Candidate As' with a text input field containing 'Interview With Hiring Manager'; 'Raters' with a search input field containing 'Start typing to find a rater.' and a magnifying glass icon; and 'Comment' with a large text area. On the right side, there is an 'Evaluate Using' section with three radio button options: 'Pass/Fail' (which is selected), 'Star Rating', and 'Percentage'.

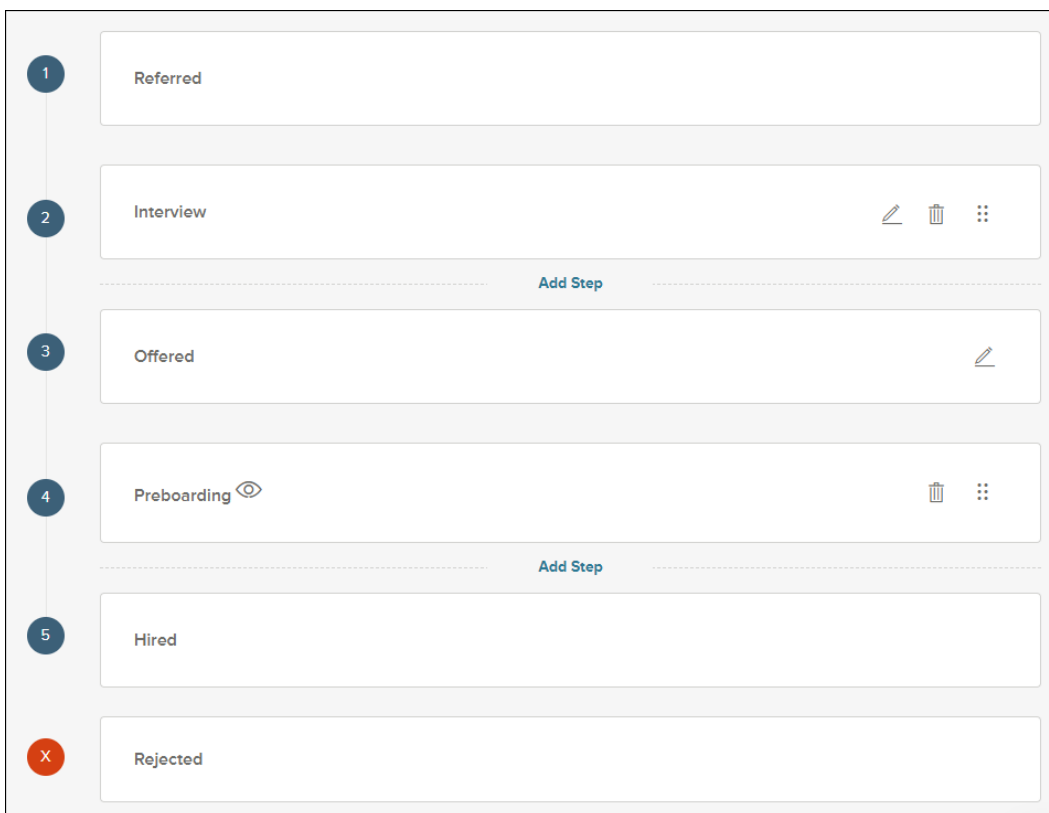
5. Once you're done, click Save & Close.



- Click Add Step below the Offered step.



- From the Choose a Step Type field, select Preboarding and then click Save.



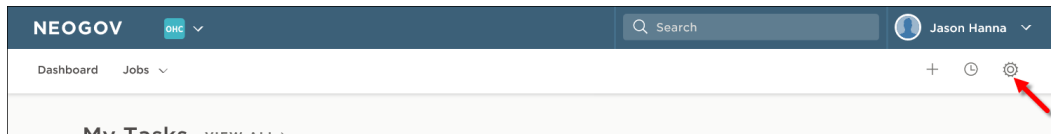
## Create an Approval Workflow


The OHC provides an approval workflow platform from which you can create saved, department-specific approval paths for requisitions, offers and hires.

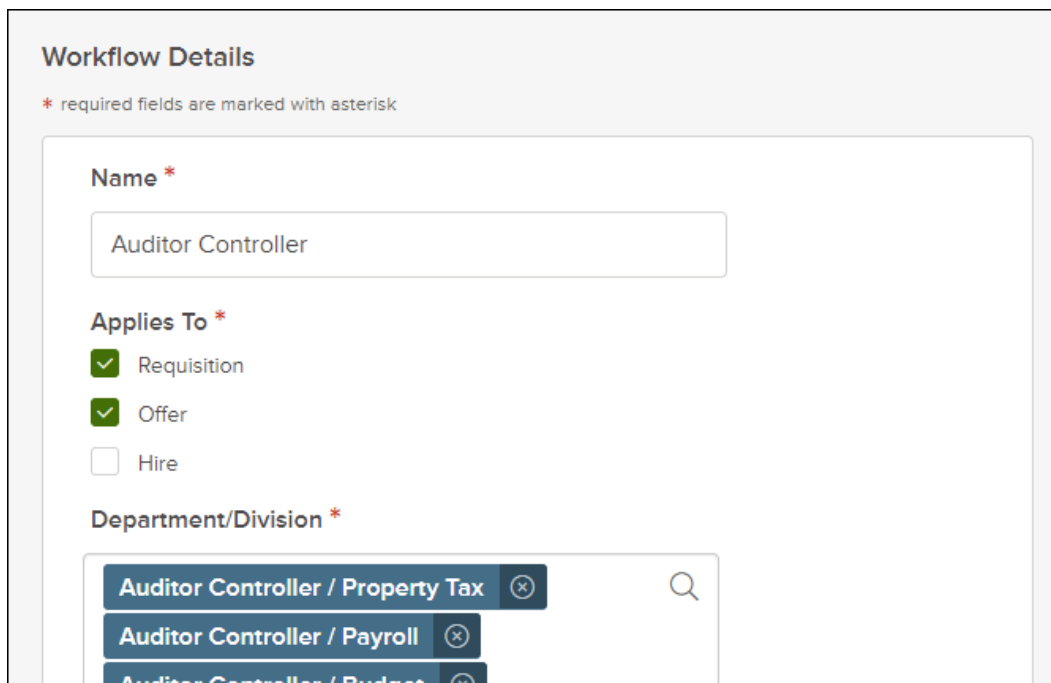
Required OHC role: With the OHC role of HR Liaison, you can create saved approval workflows for your assigned department(s)/division(s).


### Steps to Create an Approval Workflow

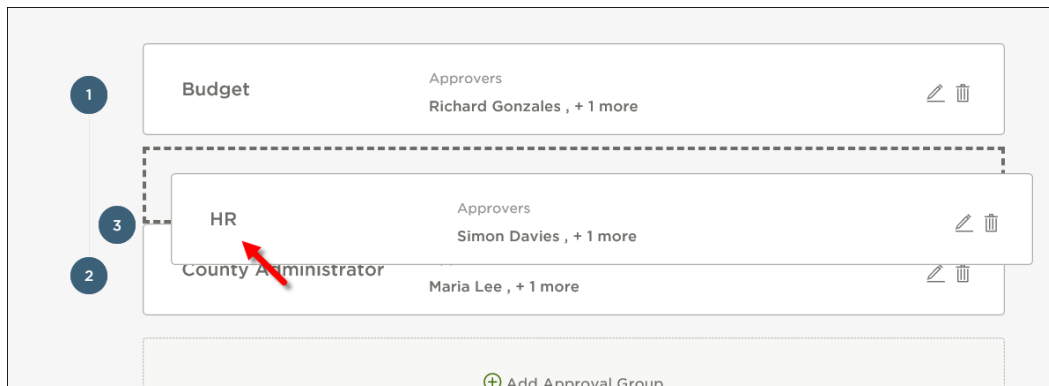
1. From the upper right, click the Settings button. It looks like a gear.



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



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



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

## Create a Requisition

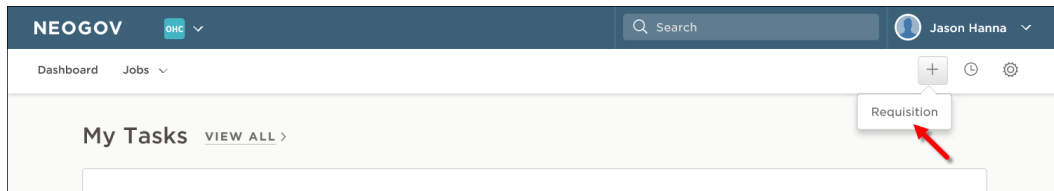
When a hiring department has an open position, they'll submit a requisition as a request to fill the vacancy.

Below are two navigation paths to start up the process of creating a requisition. Use the path that feels most natural to you.

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

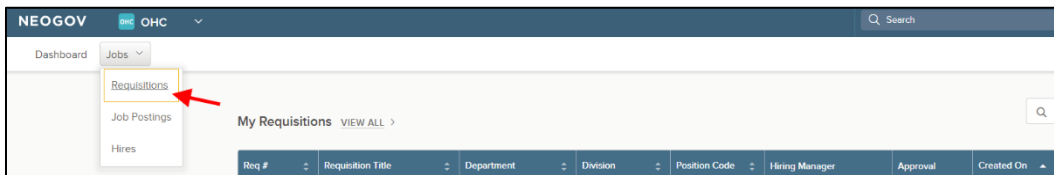
### Navigation Path 1

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

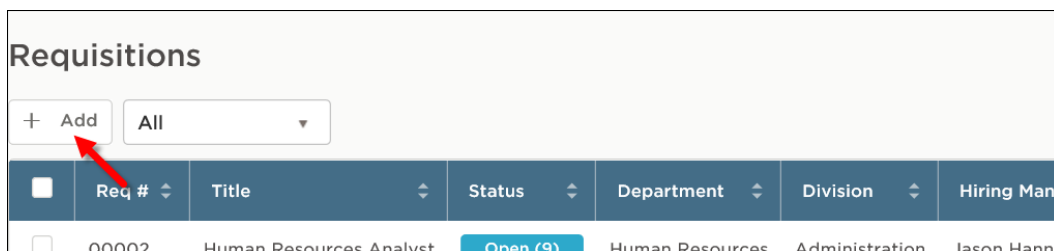


### Navigation Path 2

On the Jobs menu, click Requisitions.



Then click Add.



## Steps to Create a Requisition

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

### Requisition Details

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

### Position Details

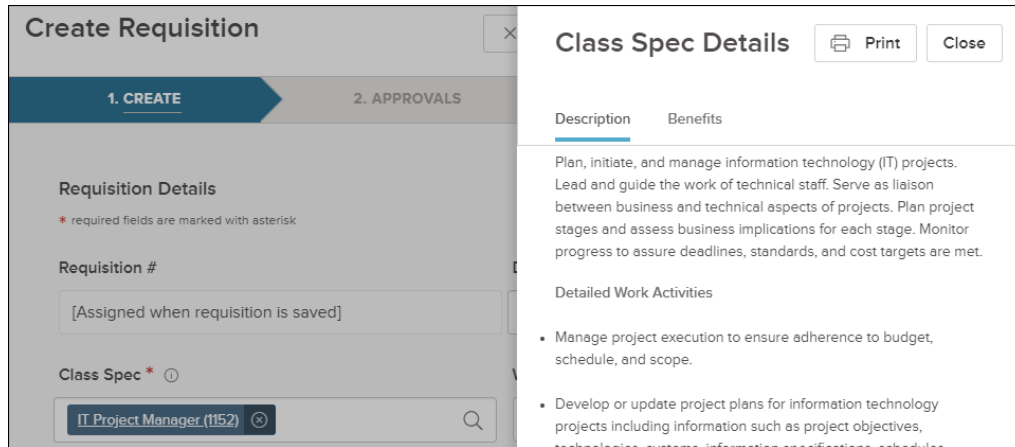
**New Position?**  
 Yes  No

<b>Position # *</b> 000361	<b>Vacancy Date</b> 03/01/2018
-------------------------------	-----------------------------------

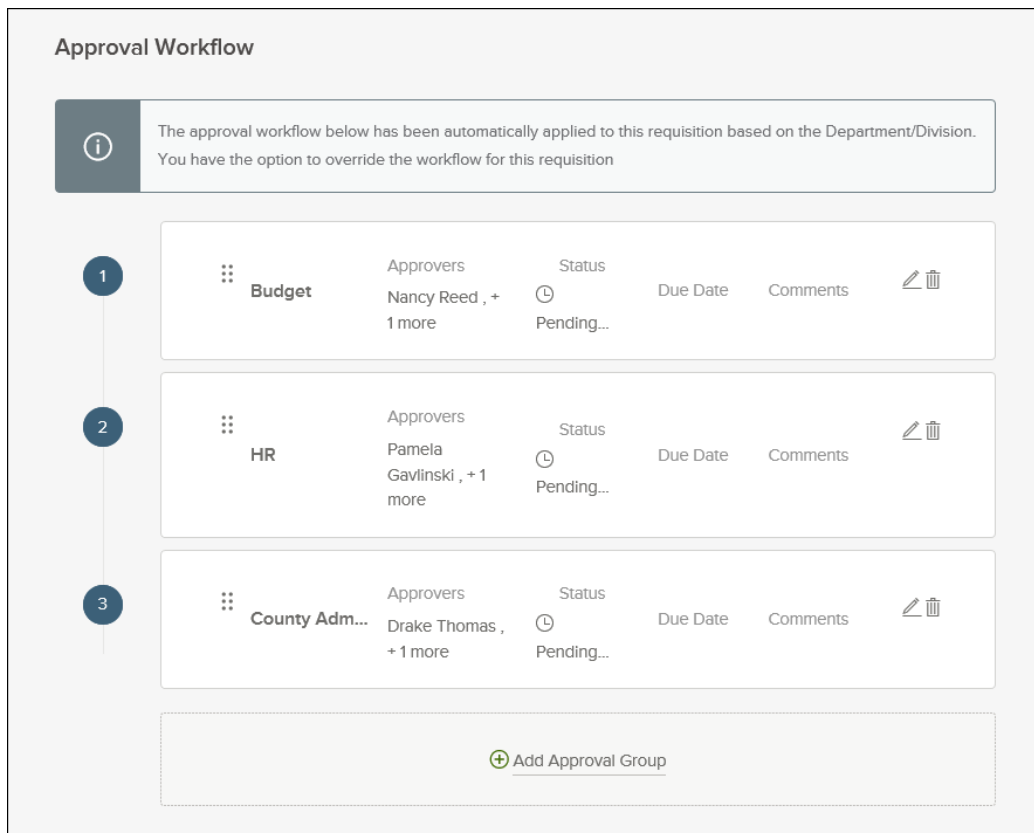
**Delete**


2. Complete the requisition form page.

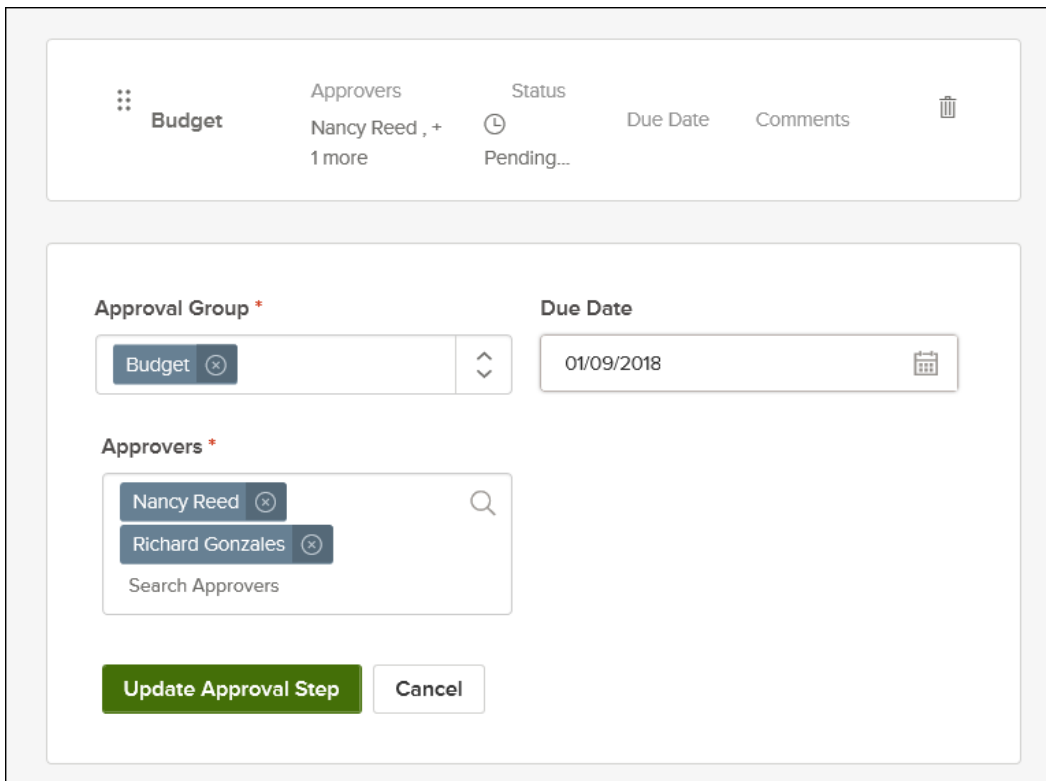
- Have you selected the correct class spec? There's a way you can check! From the Class Spec field, click the selected job title to have a closer look. If you'd prefer printing the class spec, simply click Print. After your review, click Close.



- Once you've completed the form, click Save & Continue to Next Step.
- If you have an approval workflow template, it will display on the second requisition form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes will only be applied to this requisition, not the saved approval workflow template.



6. 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.



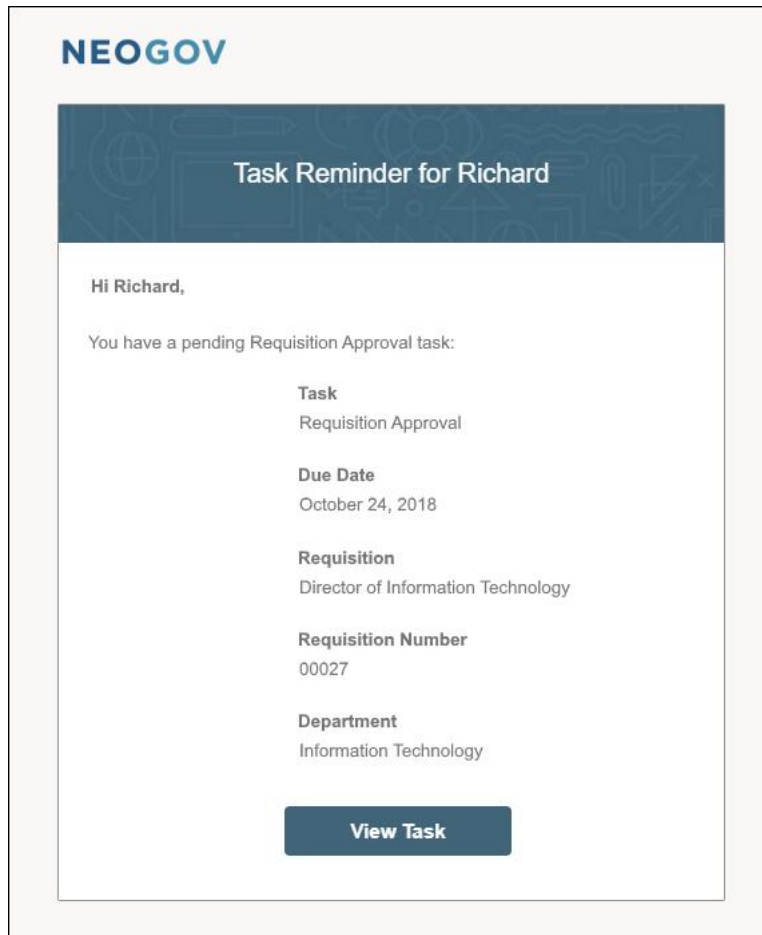
The screenshot shows a configuration window for an approval task. At the top, there is a table with columns: Budget, Approvers, Status, Due Date, and Comments. The 'Budget' column contains 'Budget'. The 'Approvers' column contains 'Nancy Reed , + 1 more'. The 'Status' column contains a clock icon and 'Pending...'. The 'Due Date' column contains 'Due Date'. The 'Comments' column contains a trash icon.

Below the table, there are two main sections:


- Approval Group \***: A dropdown menu showing 'Budget' with a close icon and a caret icon.
- Due Date**: A text input field containing '01/09/2018' and a calendar icon.
- Approvers \***: A search box containing 'Nancy Reed' and 'Richard Gonzales', both with close icons. Below the search box is the text 'Search Approvers'.

At the bottom of the configuration window, there are two buttons: a green 'Update Approval Step' button and a white 'Cancel' button.

7. 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 day 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.

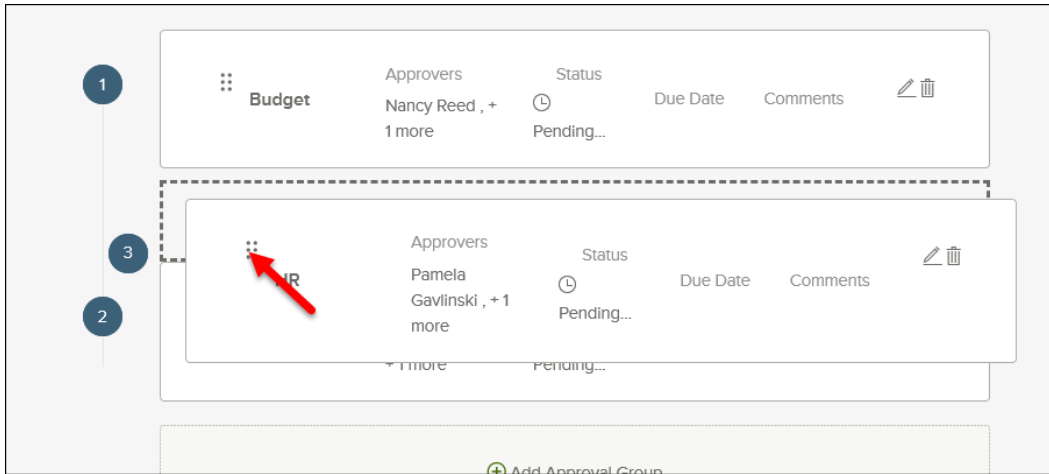


Note: Task reminder emails, such as the requisition approval reminder, must be enabled by an Insight Administrator (Insight navigation: Admin > Agency Preferences > OHC section).

8. If a template for your department/division does not exist, you will be prompted to create an approval workflow. You have two options: (1) Create an approval workflow. (2) Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.
9. On the Approval Group pulldown, click the applicable approval group.
10. From the Approvers field, click , select the applicable approvers, and then click Done.
11. Click Add Approval Step.
12. Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.

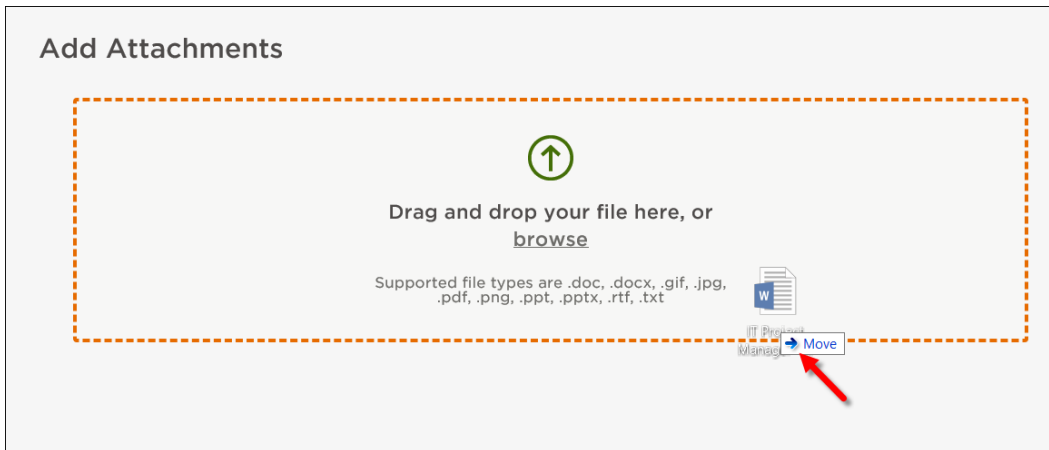


13. Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop.



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

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



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

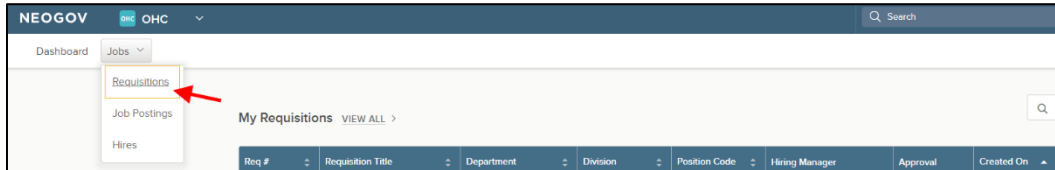
## Delete a Requisition

Did you make a mistake by creating a requisition that is not needed? If so, no worries! You can delete the requisition if it has a status of Draft or In Progress.

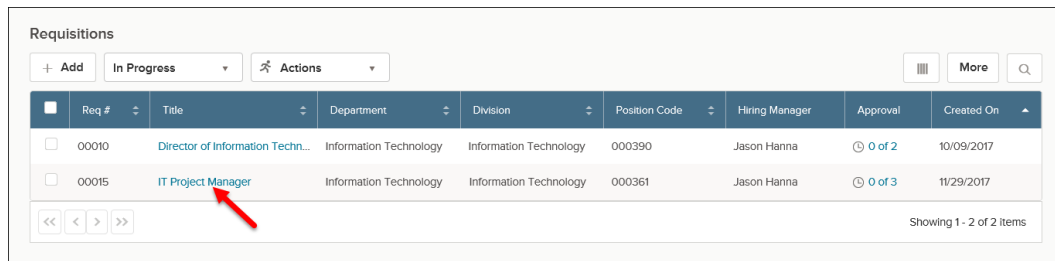
Required OHC role: With the OHC role of Originator or HR Liaison, you can delete a requisition.

### Steps to Delete a Requisition

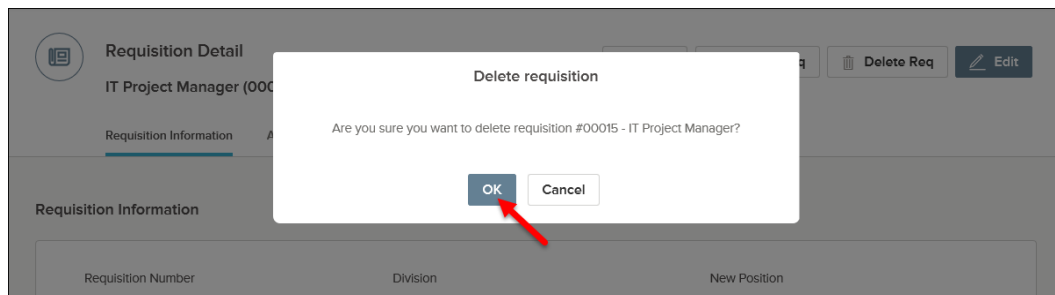
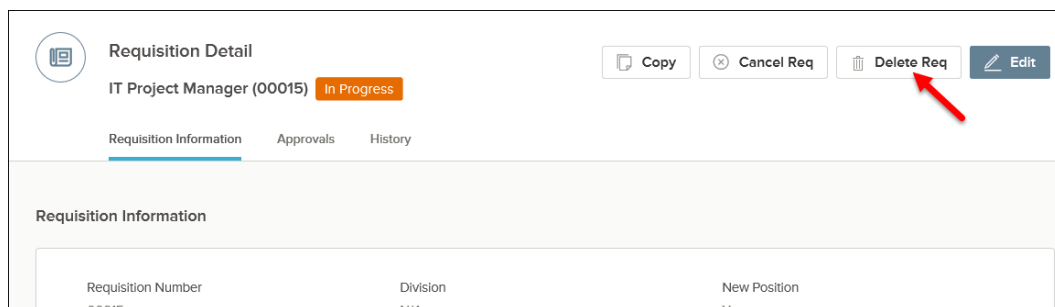
1. On the Jobs menu, click Requisitions.



2. Click the requisition to be deleted.



3. Click Delete Req and click OK to confirm deleting the requisition.



## Approve a Requisition

The selections of approve, deny and on hold are available in the OHC. If a requisition requires canceling, it must be cancelled by the person that created it or someone with the role of HR Liaison. Additionally, if a requisition has been approved, it can be cancelled by an HR staff member with Insight access.

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

## Requisition Approval Path Example

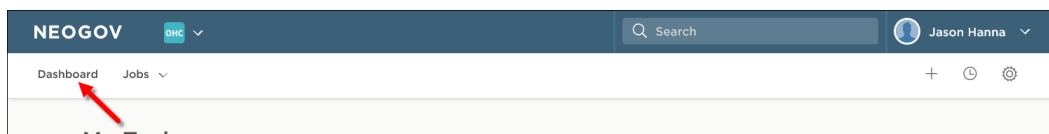
In the example below, the defined approval path requires the requisition to travel through a total of four approval groups before going to HR.

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

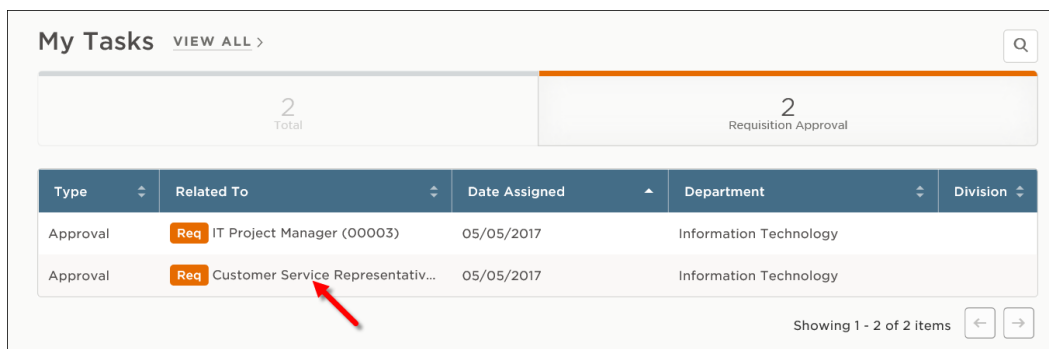
Approval Group	Selected Approver(s)
Group 1: Manager	Simon Davies and Melanie Scott
Group 2: Director	Joyce Lowe and Mark Campbell
Group 3: Budget	Nancy Reed
Group 4: President	Drake Thomas

## Steps to Approve a Requisition

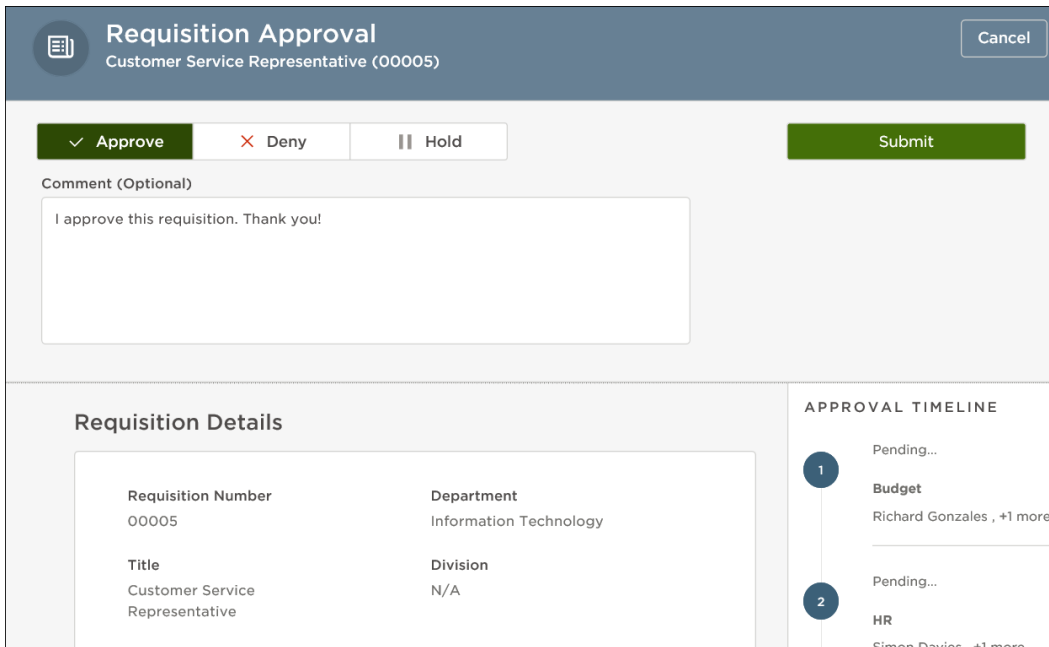
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



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



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



**Requisition Approval**  
Customer Service Representative (00005) Cancel

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

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

**APPROVAL TIMELINE**

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

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

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



**Requisition Approval**  
IT Project Manager (00003) Cancel

Send Back to Step  
Originator - Hanna Jason

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

Requisition Details	
Requisition Number	Department

**APPROVAL TIMELINE**

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

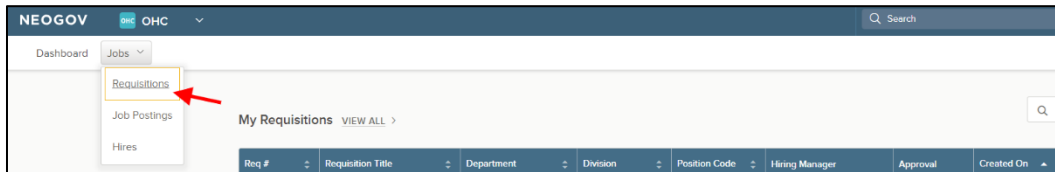
## Cancel a Requisition

For various reasons, you may need to simply cancel a requisition and not continue with the recruitment process. The OHC provides the option to cancel a requisition, even after it has been approved.

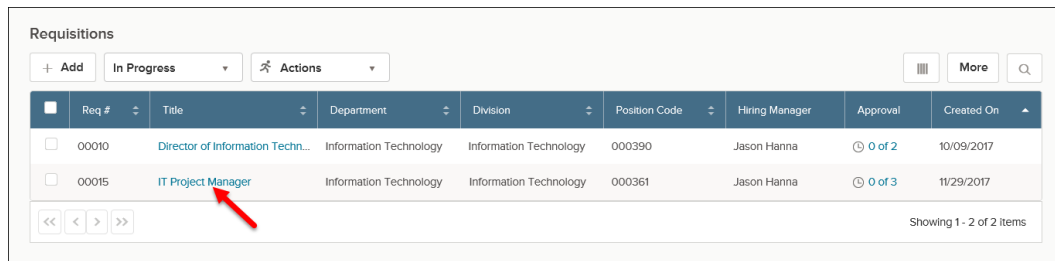
Required OHC role: With the OHC role of Originator or HR Liaison, you can cancel a requisition.

### Steps to Cancel a Requisition

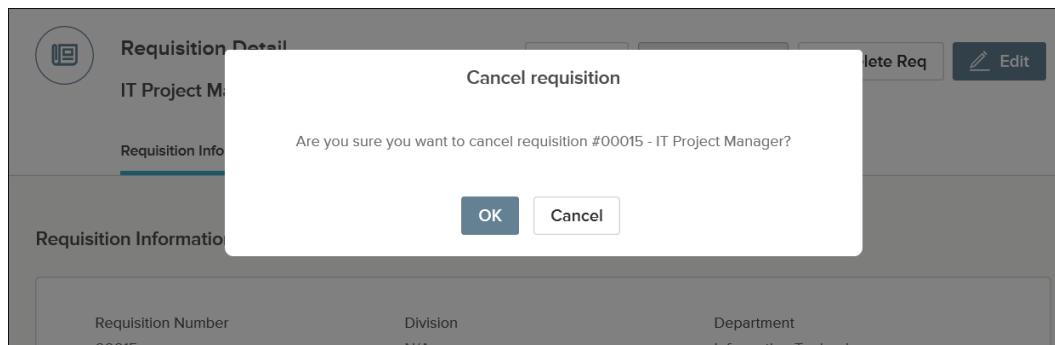
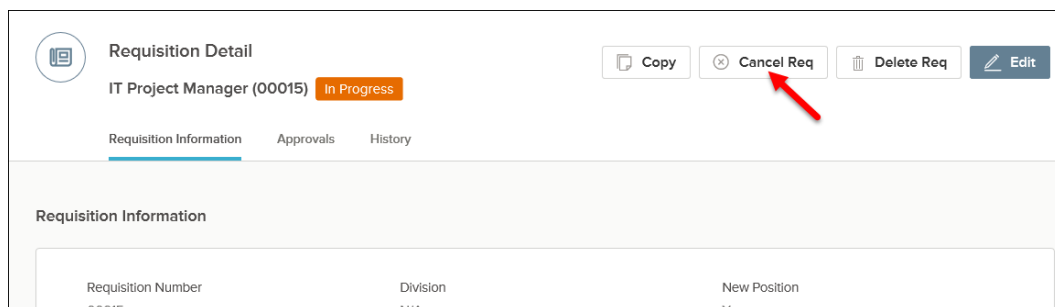
1. On the Jobs menu, click Requisitions.



2. Click the requisition to be cancelled.



3. Click Cancel Req and click OK to confirm cancelling the requisition.



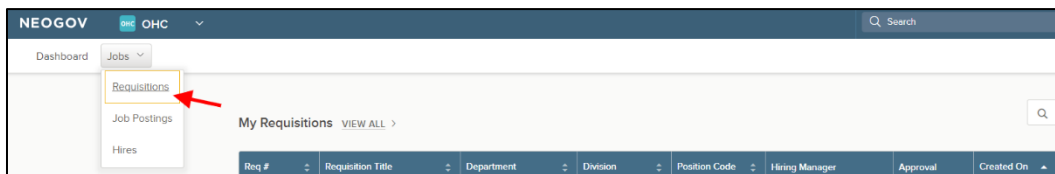
## Reassign Requisitions

Perhaps you're taking some time away from the office or you've been promoted to a new position. Whatever the circumstance, you can reassign one or more requisitions to another team member. The requisition(s) will display in the new owner's My Task section.

Required OHC role and permission: With the OHC role of Originator, HR Liaison or Hiring Manager, and the Update Owner permission selected (Insight navigation: Admin > Configuration Settings > Security Roles – OHC), you can reassign one or multiple requisitions to a different owner within your assigned department(s)/division(s).

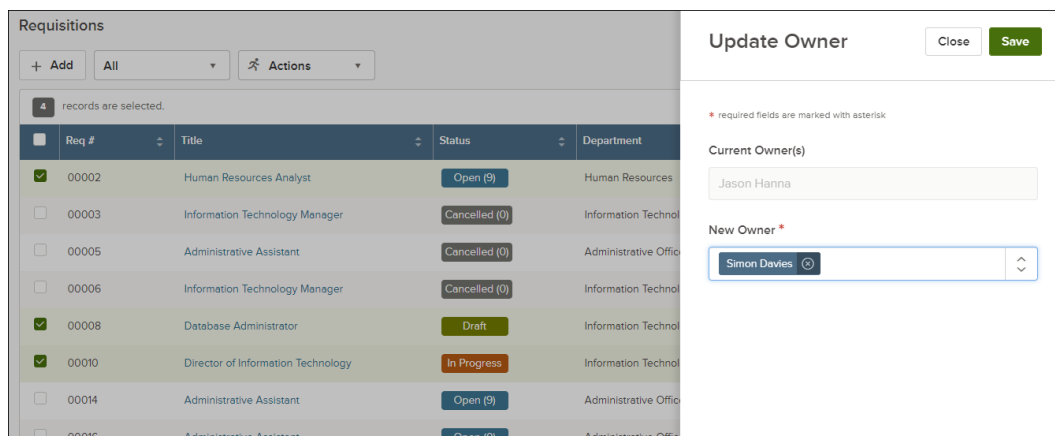
### Steps to Reassign Requisitions

1. On the Jobs menu, click Requisitions.



2. Select the requisition(s) requiring reassignment to a different owner. If you've selected multiple requisitions, be sure the current owner is the same for all selections; the OHC allows reassignments, one owner at a time. On the Actions menu, click Update Owner.

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



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

## Complete an SME Review

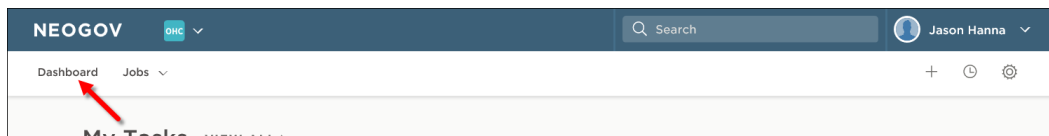
SME reviews are used when HR enlists the expertise of their organization’s subject matter experts (SMEs) to assist with the candidate selection process. The application of an SME review ranges from a simple pass/fail rating with a single reviewer, to a scored assessment with a panel of multiple reviewers.

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

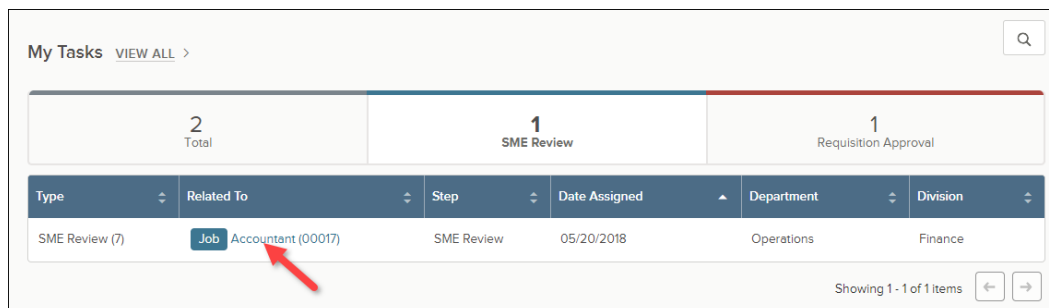
Required OHC role: With the OHC role of SME, you can complete an SME review.

### Steps to Complete an SME Review

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



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



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

Candidates

7 Total      7 Unreviewed      0 Reviewed

	Person ID	Candidate Name	Assigned By	Last Reviewer	Last Reviewed
<input type="checkbox"/>	18840196	Avila, Elizabeth	Jason Hanna		
<input type="checkbox"/>	21099742	Barajas, Sandra	Jason Hanna		
<input type="checkbox"/>	19795990	Daniels, Paula	Jason Hanna		
<input type="checkbox"/>	18331752	James, Edward E.	Jason Hanna		

4. The application will display including contact information, work experience, education and other information. Click the Questions tab to review the candidate's answers to agency-wide and job-specific supplemental questions. Similarly, click the E-References tab to review feedback provided by reference contacts. You have three ratings in a pass/fail setting: Pass, Fail and Other. Click one of these ratings. Also, enter any general comments in the Overall Comments field.

Avila, Elizabeth  
Person ID: 18840196 NA

Application   Questions   E-References

**General Information**

Contact Information  
123 First Street  
Springfield, IL 62702  
US  
(888)555-5555 primary  
(888)555-5555 alternate

Personal Information  
Date of Birth

Your score \*  Pass  Fail  Other

Overall Comments  
Excellent candidate. Lots of recent experience in the field.

Submit



In a scored setting, enter your score and any rating-specific comments in the field below the score. Also, enter any general comments in the Overall Comments. While rating a candidate, you may notice a Disposition Comments section. These are the comments left by HR.

**Avila, Elizabeth**  
Person ID: 18840196 NA

← Prev   Next →   Print   Cancel

Application   Questions   E-References

**General Information**

Contact Information  
123 First Street  
Springfield, IL 62702  
US  
(888)555-5555 primary  
(888)555-5555 alternate

Personal Information  
Date of Birth  
01/01  
Notification Preference  
Email  
Have proof of your legal right to work in the US?  
Yes  
SSN  
xxx-xx-1111  
Driver's License  
Yes A\*\*\*3  
CA, Class C

\* required fields are marked with asterisk

**Brenda's Rating** \* 95.00

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

**Simon's Rating** SCORE --  
This section has not been rated yet

**Reject Reason**  
- Make a selection -

**Disposition Comments**  
Elizabeth appears to meet the experience requirements. Sending to our subject matter experts to confirm.

**Overall Comments**  
Excellent candidate. Lots of recent experience in the field.

Note: If a candidate has a failing score, you can select the applicable reason from the Reject Reason pulldown.

5. Once you're done, click Submit. The next candidate pending your review will display.

**Barajas, Sandra**  
Person ID: 21099742 NA

← Prev   Next →   Print   Cancel

Application   Questions   E-References

**General Information**

Contact Information  
123 First Street  
Springfield, IL 62702  
US  
(888)555-5555 primary

\* required fields are marked with asterisk

**Brenda's Rating** \* Score

Write a comment...

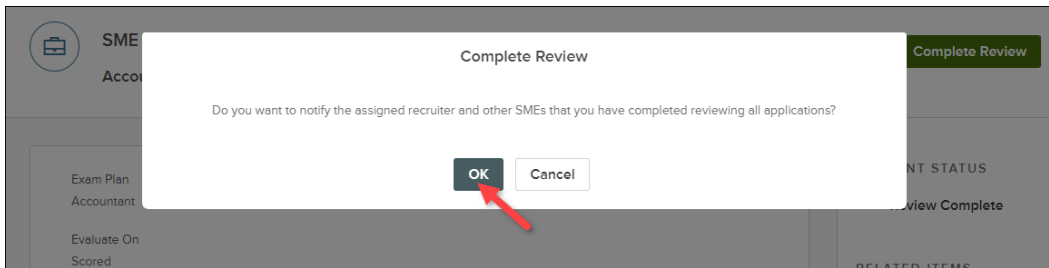
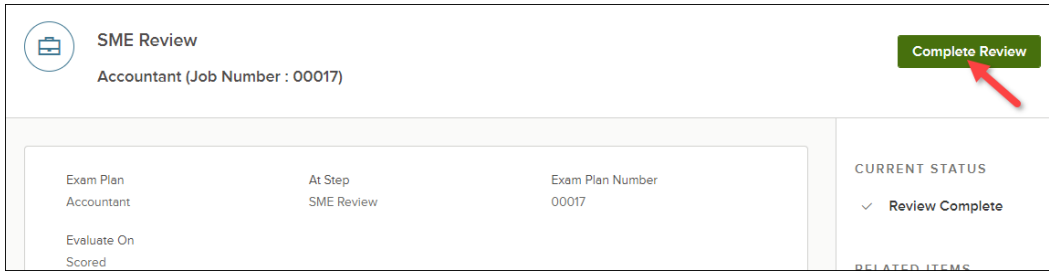
- Repeat these rating steps for all remaining candidates. Click Cancel or click anywhere to the left of the last candidate's application review page.

The screenshot shows the review page for Bettina Newman. At the top, it displays "Newman, Bettina", "Person ID: 21987323", and a "Pass" status with a "70.00%" rating. Navigation buttons include "Prev", "Next", "Print", and "Cancel". A red arrow points to the "Cancel" button. Below the navigation are tabs for "Application", "Questions", and "E-References". The left sidebar contains "General Information" and "Contact Information" (123 First Street, Springfield, IL 62702). The main content area shows "Brenda's Rating" with a score of 70.00 and a "Write a comment..." field. A note at the top right states "required fields are marked with asterisk".

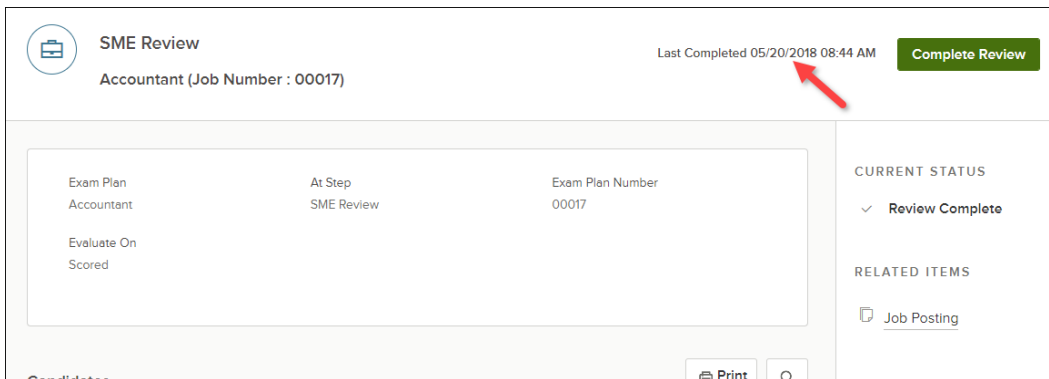
- Notice you have no unreviewed candidates and your SME review status is complete.

The screenshot shows the "SME Review" dashboard for Accountant (Job Number: 00017). A green "Complete Review" button is in the top right. The main area displays a table with columns: Exam Plan, Accountant, Evaluate On, At Step, SME Review, Exam Plan Number, and 00017. Below this is a "Candidates" section with a "Print" button and a search icon. A summary bar shows 7 Total, 0 Unreviewed, and 7 Reviewed candidates. Below the bar is a table with columns: Person ID, Candidate Name, Assigned By, Last Reviewer, Last Reviewed, and Disposition. The table is empty, showing "No candidates found". A pagination bar at the bottom shows "Showing No items to display". On the right sidebar, under "CURRENT STATUS", there is a checked "Review Complete" item with a red arrow pointing to it. Below that is a "RELATED ITEMS" section with a "Job Posting" link.

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



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



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

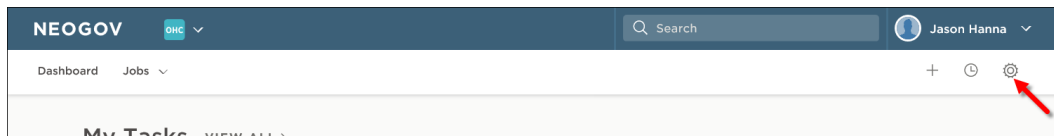
## Set up a Test Location

Test locations are used for a scheduling on-site assessments and interviews.

Required OHC role: With the OHC role of Hiring Manager or HR Liaison you can set up a test location.

### Steps to Set up a Test Location

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



2. Click Test Locations and click Add.
3. Complete the form and click Save & Close. The information provided in this form can be used to communicate to candidates, via email notice templates, the details of scheduled appointments. E.g., Address, City, State and Zip Code of the test location.

A screenshot of the 'Add Location' form in the NEOGOV system. The form is titled 'Add Location' and has 'Cancel' and 'Save & Close' buttons. The form is divided into 'Test Location Details' and contains the following fields:

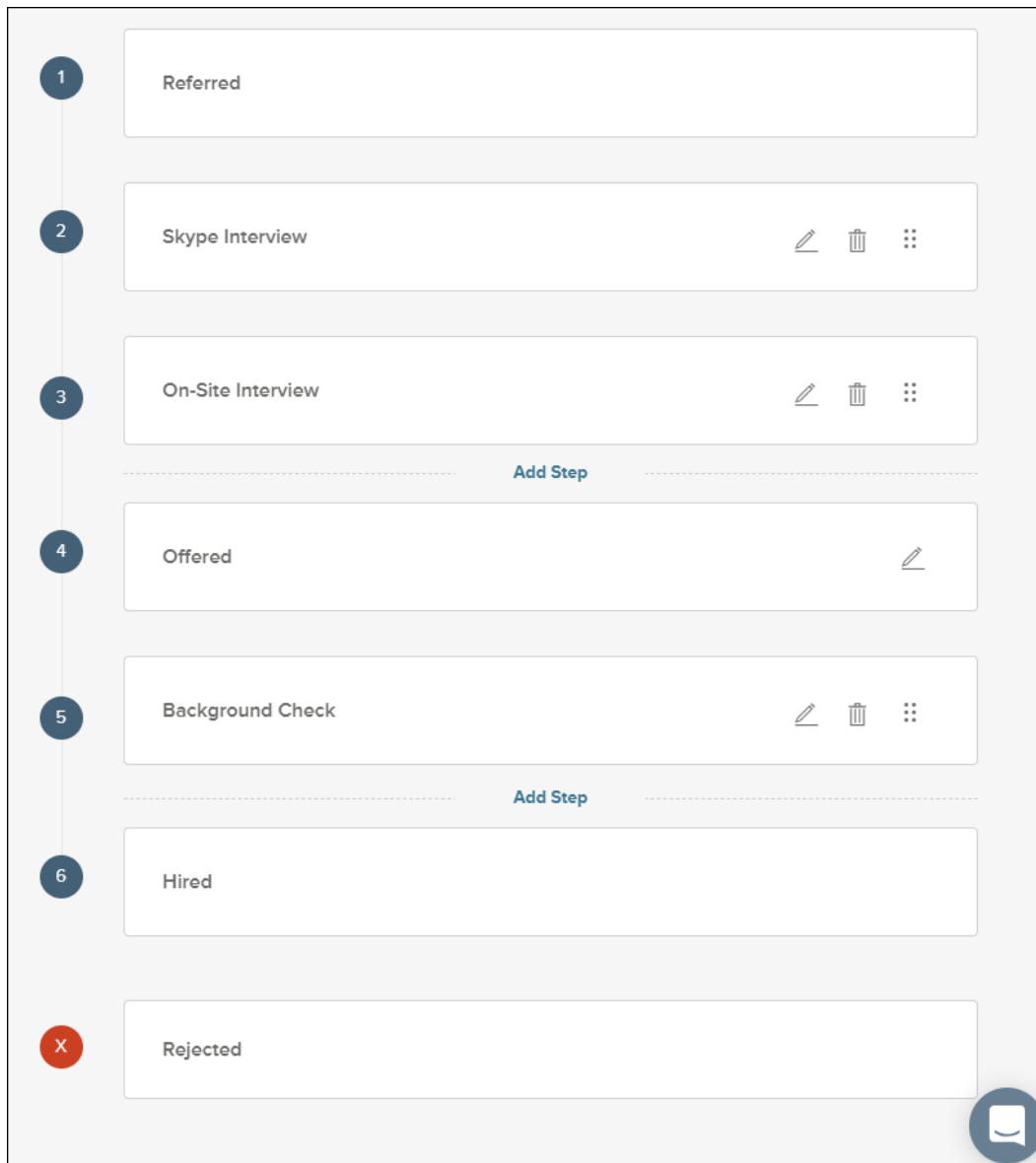
- Location \* (text input): Community Center
- Code (text input):
- Address 1 \* (text input): 110 State Street
- Address 2 (text input):
- City \* (text input): Grand City
- State \* (dropdown menu): California
- Zip Code \* (text input): 90927
- Phone (text input): ( ) - - ext. -
- Exam Type(s) \* (checkboxes):  Interview,  Exam
- Max Candidates (text input): 100

4. Repeat these steps for any additional test locations.

## Customize a Hire Workflow

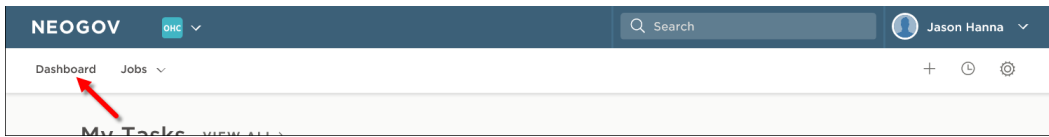
The referred list has hire workflow steps based on your organization's global setting. Customize this workflow if your department requires modifications to existing steps and/or additional pre and post offer steps.

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

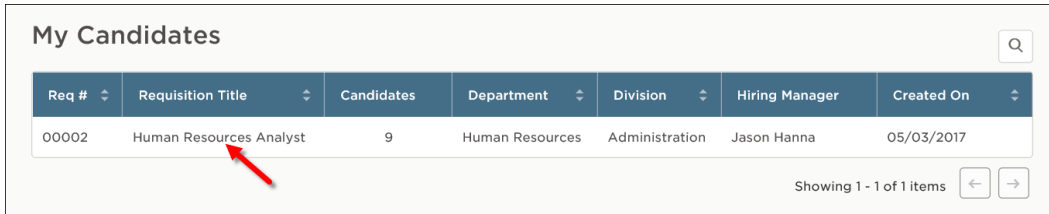


## Steps to Customize a Hire Workflow

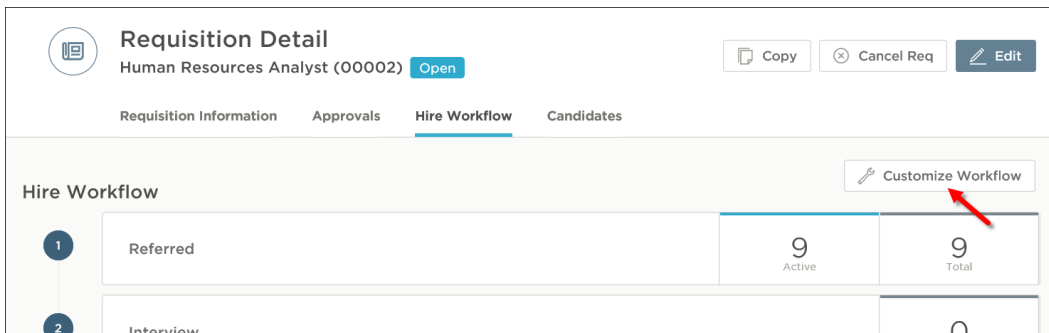
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.





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



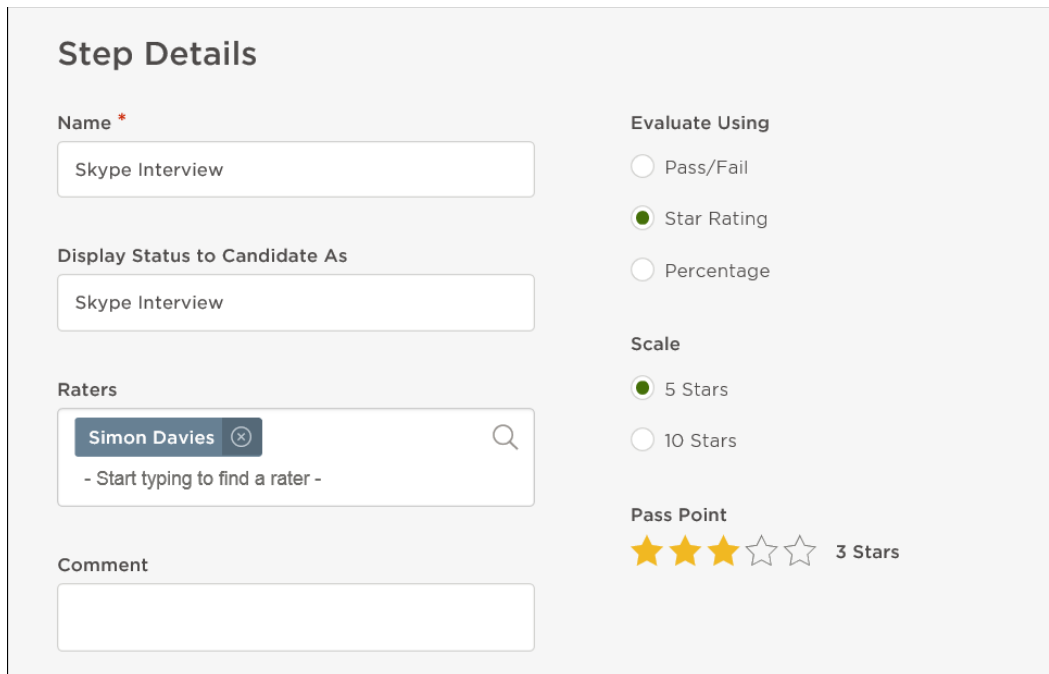
3. Click the Hire Workflow tab and click Customize Workflow.



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

**Note:** Your Insight Administrator must have the Show Jobseekers Referral Dept & Req # set to Yes for candidates to view statuses and/or self-schedule for interviews/assessments (Insight navigation: Admin > Agency Preferences > OHC section).



Treat the star rating method the same as point method, e.g., 5 stars equals 5 points. You have a choice of a 5-star or 10-star scale. Like the percentage score rating method, the star rating is averaged if there are multiple raters.



**Step Details**

Name \*  
Skype Interview


Display Status to Candidate As  
Skype Interview

Raters  
Simon Davies    
- Start typing to find a rater -

Comment

Evaluate Using  
 Pass/Fail  
 Star Rating  
 Percentage

Scale  
 5 Stars  
 10 Stars

Pass Point  
 3 Stars

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

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

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

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

### Appointment Scheduling

Pre-Configure Interview Slots

Allow Candidate Self-Scheduling

\* required fields are marked with asterisk

**1 Select Location(s) \***

Community Center - 110 State Street , ...
📍

**2 Select Available Dates \***

October 2018

Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

October 22, 2018 ✕

October 24, 2018 ✕

October 26, 2018 ✕

**3 Select Times**

Start Time \*      End Time \*      Duration \*      Time Between Slots \*

10:00 AM
to

3:30 PM
⬆️ ⬆️

45 min
⬆️ ⬆️

15 min
⬆️ ⬆️

Pacific Time (US & Canada); Tijuana

**4 Self Schedule Deadline**

10/15/2018
📅

**5 Add Breaks**

Starts      Ends

12:00 PM
⬆️ ⬆️

1:00 PM
⬆️ ⬆️

- +

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

Starts      Ends

2:00 PM
⬆️ ⬆️

2:30 PM
⬆️ ⬆️



- +

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



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

The screenshot shows a vertical flow of four steps. Step 1 is 'Referred'. Step 2 is 'Skype Interview' with edit, delete, and menu icons. Step 3 is 'Choose a Step Type' with a dropdown menu showing 'Interview', 'Save', and 'Cancel' buttons. A red arrow points to the 'Interview' dropdown. Step 4 is 'Offered' with edit and chat icons.

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

The 'Step Details' form contains the following fields and options:


- Name \***: On-Site Interview
- Display Status to Candidate As**: On-Site Interview
- Raters**: Simon Davies (with a search icon and a placeholder '- Start typing to find a rater -')
- Comment**: (empty text area)
- Evaluate Using**:
  - Pass/Fail
  - Star Rating
  - Percentage
- Max Score \***: 100.00
- Passing Score % \***: 70.00

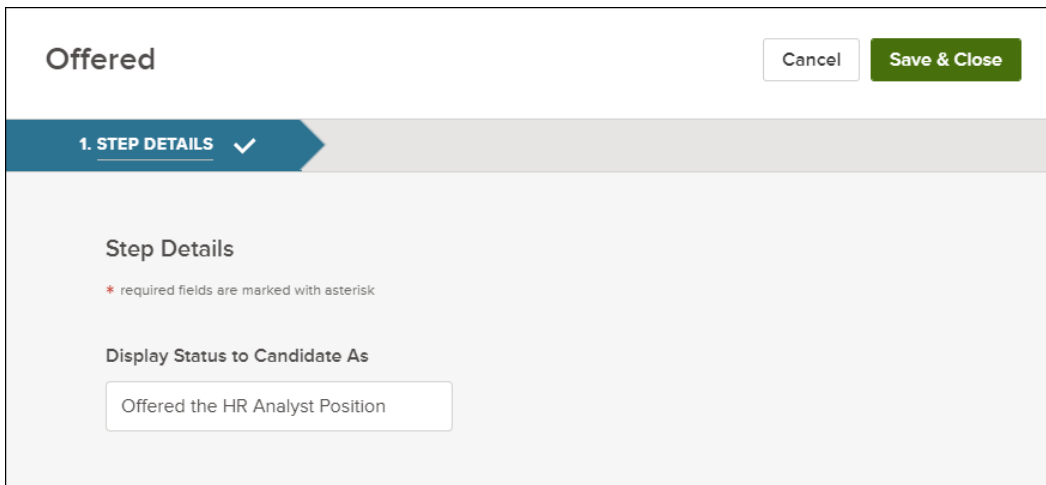
12. Once you're done, click Save & Continue to set up pre-configured interview slots for scheduling.

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

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

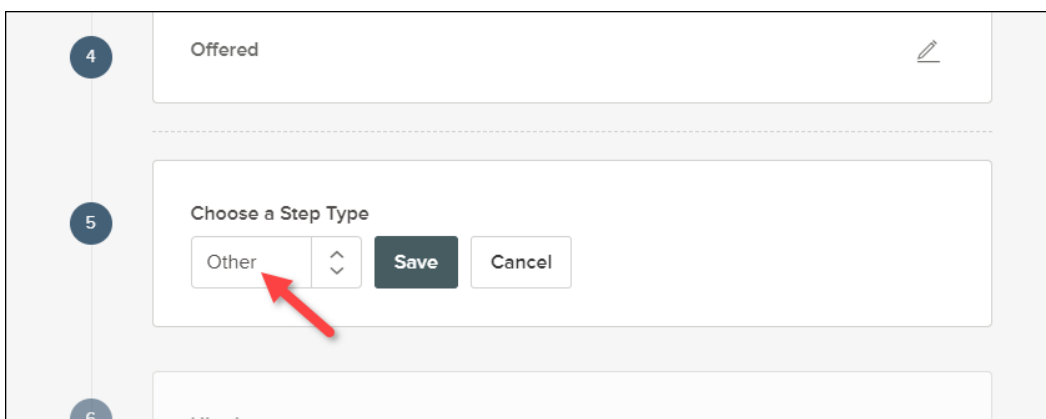
14. Repeat these steps for any additional pre-offer hire workflow steps.


15. If preferred, you can update candidates’ statuses once they reach the Offered step. From the Offered step, click . Enter a brief status message.

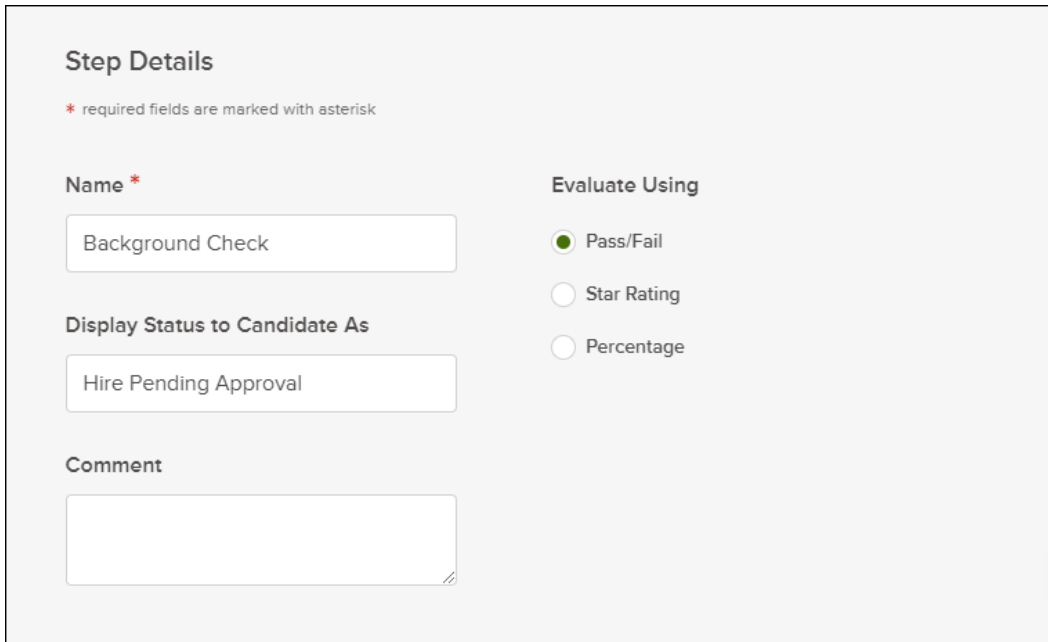


16. Once you’re done, click Save & Close.

17. Will there be a post-offer step? If so, click Add Step, below the Offered step, select Other, and then click Save.



18. From the post-offer step, click . Update the step name, candidate status, rating method, scale and pass point.



**Step Details**

\* required fields are marked with asterisk

**Name \***

**Display Status to Candidate As**

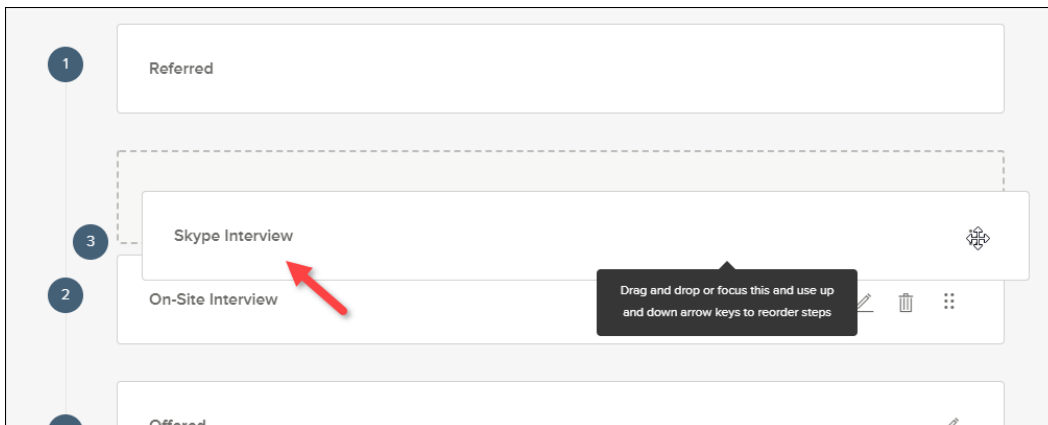
**Comment**

**Evaluate Using**

- Pass/Fail
- Star Rating
- Percentage

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

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



1 Referred

3 Skype Interview

2 On-Site Interview

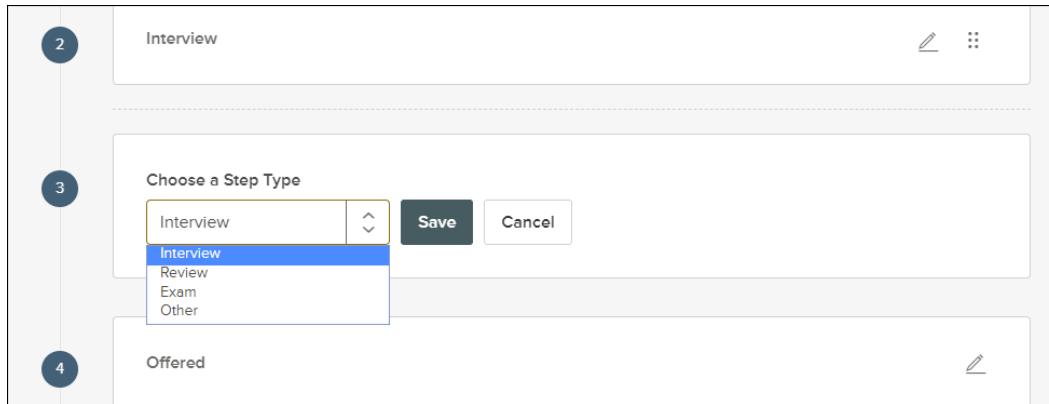
Offered

Drag and drop or focus this and use up and down arrow keys to reorder steps

21. Once you're done, click Close.

## Additional Hire Workflow Step Types

The hire workflow step types of Interview and Other were featured in the previous section. If needed, your organization may contact the NEOGOV help desk to enable two additional types: Review and Exam. Once enabled, these hire workflow types will be available for all departments/divisions.



With the hire workflow step type of Review, candidates are evaluated using one of the three standard rating methods (pass/fail, star, or percentage). This is a pre-offer step that does not require scheduling candidates to complete an assessment, e.g., a review of candidates’ submitted application materials. Completion of this step may take place prior to candidate interviews.

Similarly, with the hire workflow step type of Exam, candidates are evaluated using one of the three standard rating methods (pass/fail, star, or percentage). This is a pre-offer step that does have an available scheduling component; where a group of candidates complete an assessment, e.g., a performance exam.

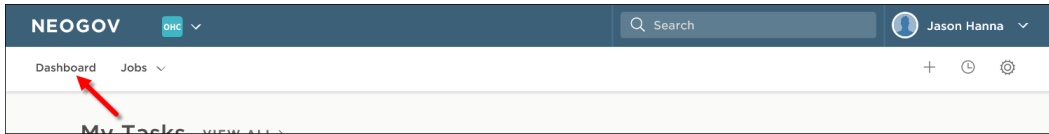
The table below provides details regarding all hire workflow step types.

Tasks/Features	Interview	Review	Exam	Other
Assign OHC Raters	•	•	•	
Assign due dates for OHC Raters		•		
Available rating methods: Pass/Fail, Star, Percentage	•	•	•	•
Individual scheduling for candidates	•			
Group scheduling for candidates			•	
Hire workflow step notice merge fields	•		•	
OHC Hiring Manager/HR Liaison update hire workflow step results	•	•	•	•

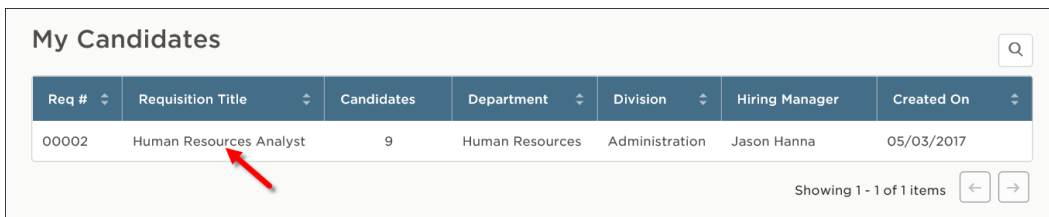
Required OHC role: With the OHC role of Hiring Manager or HR Liaison you can add a review and/or exam hire workflow step.

## Steps to Add a Review and/or Exam Hire Workflow Step

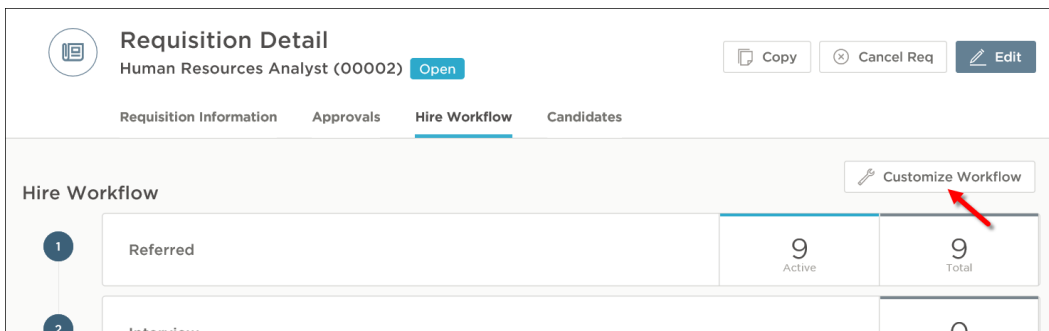
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



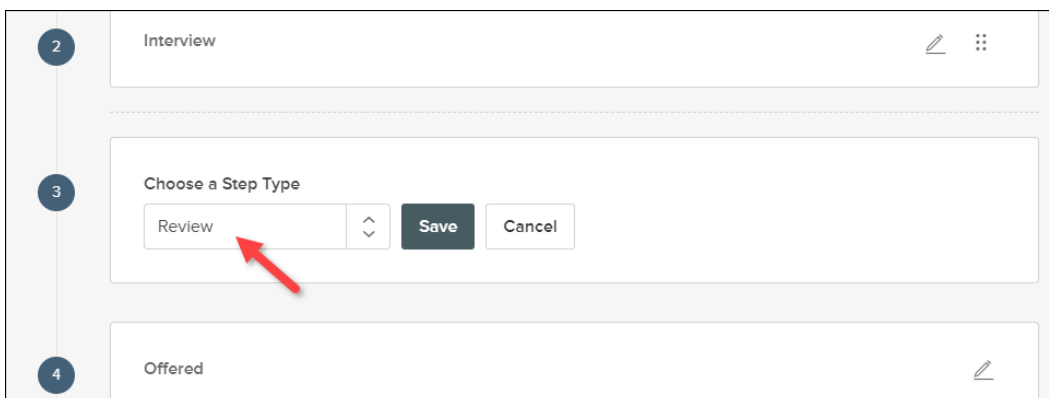
2. From the My Candidates section, click the referred list that will have a custom hire workflow.





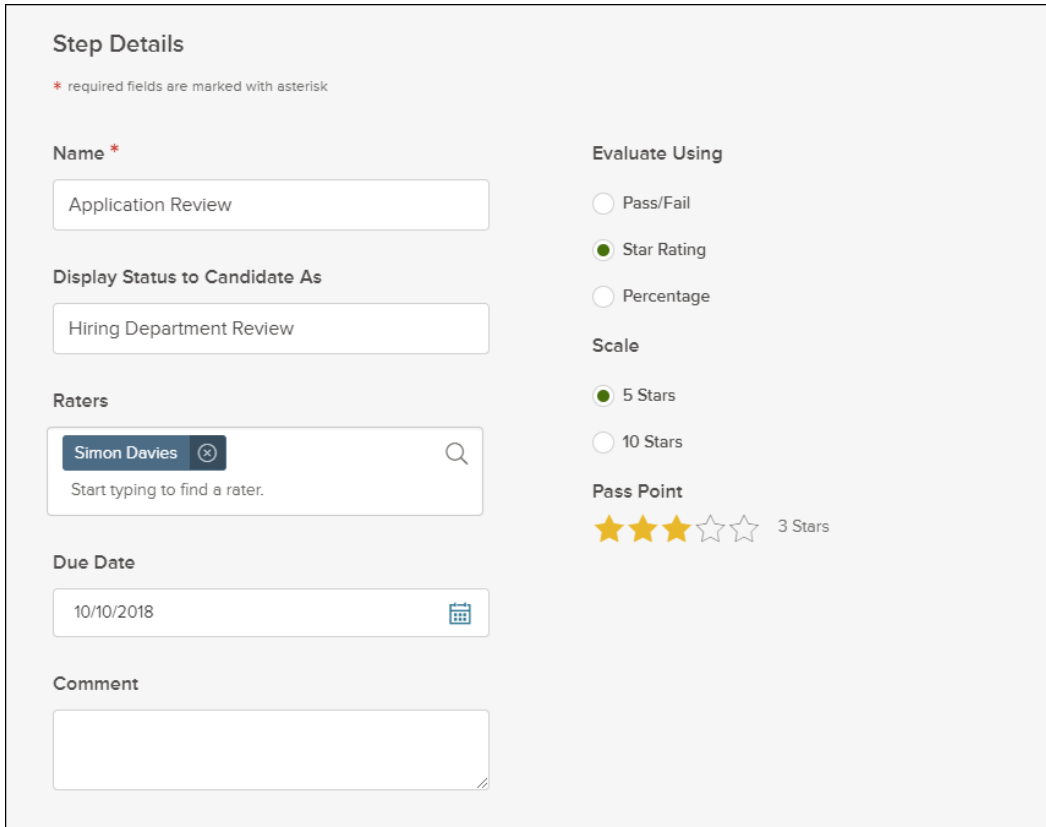
3. Click the Hire Workflow tab and click Customize Workflow.



4. Will there be a review step? If so, click Add Step, above the Offered step, select Review, and then click Save.





- From the Review step, click . Update the step name, candidate status, rating method, scale and pass point. Also, if you know who will be conducting the review, click , select the applicable rater(s), and then click Done. You can also set a due date to keep your assigned rater(s) reminded about the review task.




**Step Details**  
\* required fields are marked with asterisk

**Name \***  
Application Review

**Display Status to Candidate As**  
Hiring Department Review


**Raters**  
Simon Davies    
Start typing to find a rater.

**Due Date**  
10/10/2018 

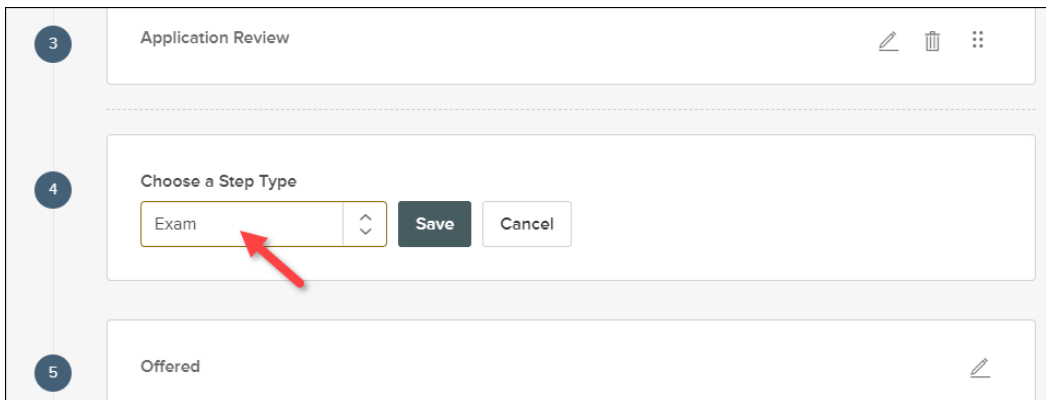
**Comment**




**Evaluate Using**  
 Pass/Fail  
 Star Rating  
 Percentage




**Scale**  
 5 Stars  
 10 Stars


**Pass Point**  
 3 Stars



- Once you're done, click Save & Close.
- Will there be an exam step? If so, click Add Step, above the Offered step, select Exam, and then click Save.



3 Application Review   

4 Choose a Step Type  
Exam   

5 Offered 

- From the Exam step, click . Update the step name, candidate status, rating method, scale and pass point. Also, if you know who will be conducting the review, click , select the applicable rater(s), and then click Done.

### Step Details

\* required fields are marked with asterisk

**Name \***

**Display Status to Candidate As**

**Raters**  
    
Start typing to find a rater.

**Comment**

**Evaluate Using**  
 Pass/Fail  
 Star Rating  
 Percentage

**Max Score \***  **Passing Score % \***

- Once you're done, click Save & Continue.
- Will candidates be allowed to sign back into Career Pages and self-schedule for the exam? If so, enable self-scheduling! From Allow Candidate Self-Scheduling switch, click to the on setting.

- Continue with setting up the exam scheduling: location(s), date(s), times, self-scheduling deadline, maximum candidates and notes.

### Appointment Scheduling

Allow Candidate Self-Scheduling

\* required fields are marked with asterisk

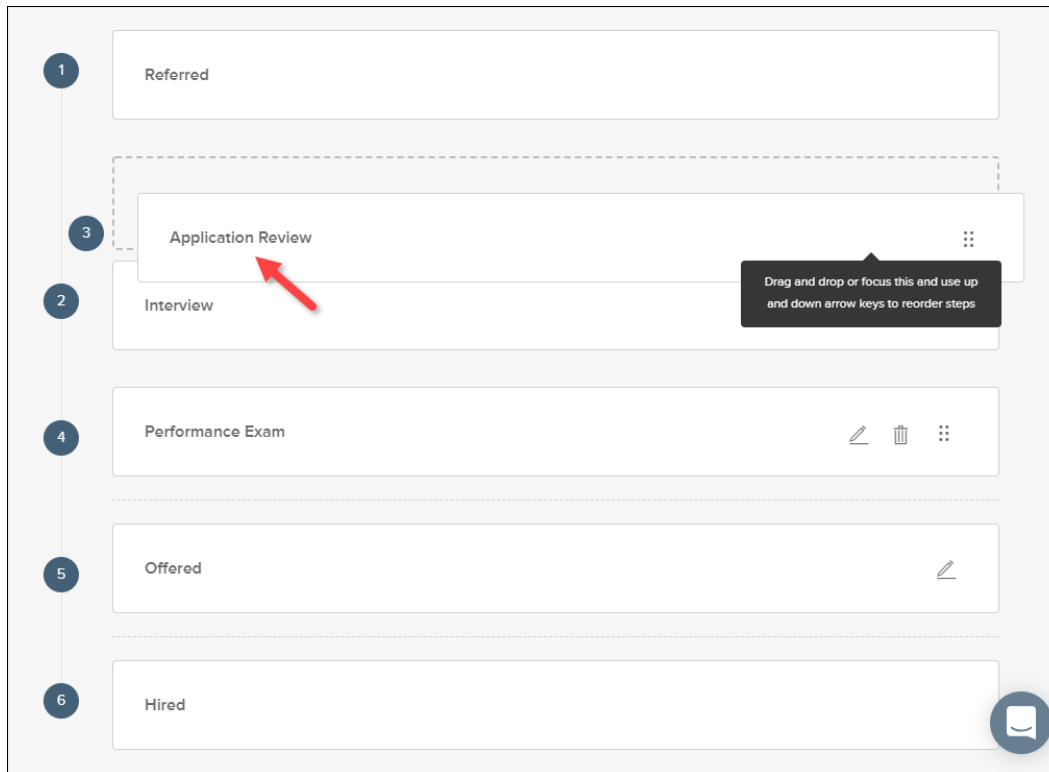
- Select Location(s) \***
- Select Available Dates \***  

November 2018						
Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8
- Select Times**  
**Start Time \***   
**Duration \***   
Pacific Time (US & Canada);  
Tiiuana
- Self Schedule Deadline**
- Maximum Candidates**
- Special Notes**

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



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



14. Once you're done, click Close.

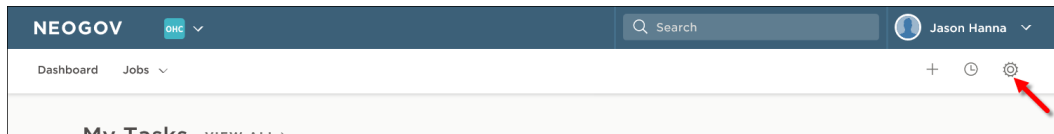
## Set up a Notice Template

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

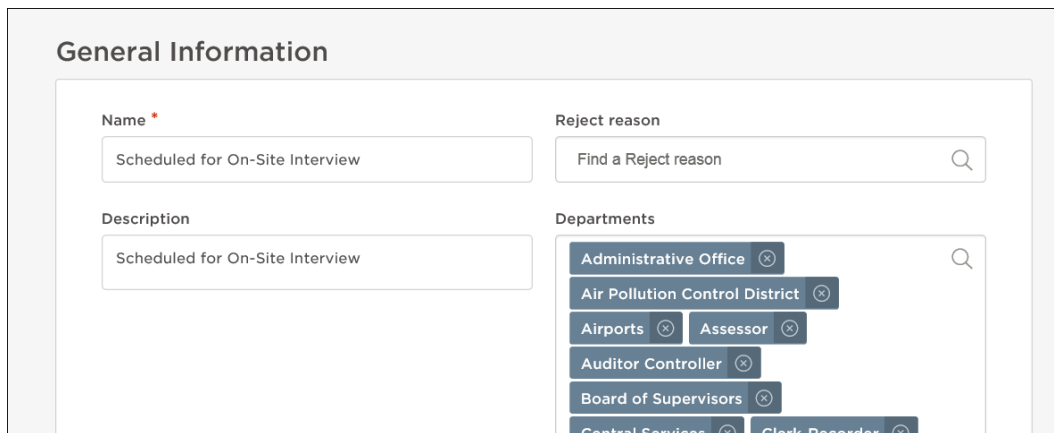
Required OHC permission: With the OHC permission of Create OHC Notice Templates you can create a notice template for your assigned department(s)/division(s).

### Steps to Set up a Notice Template

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

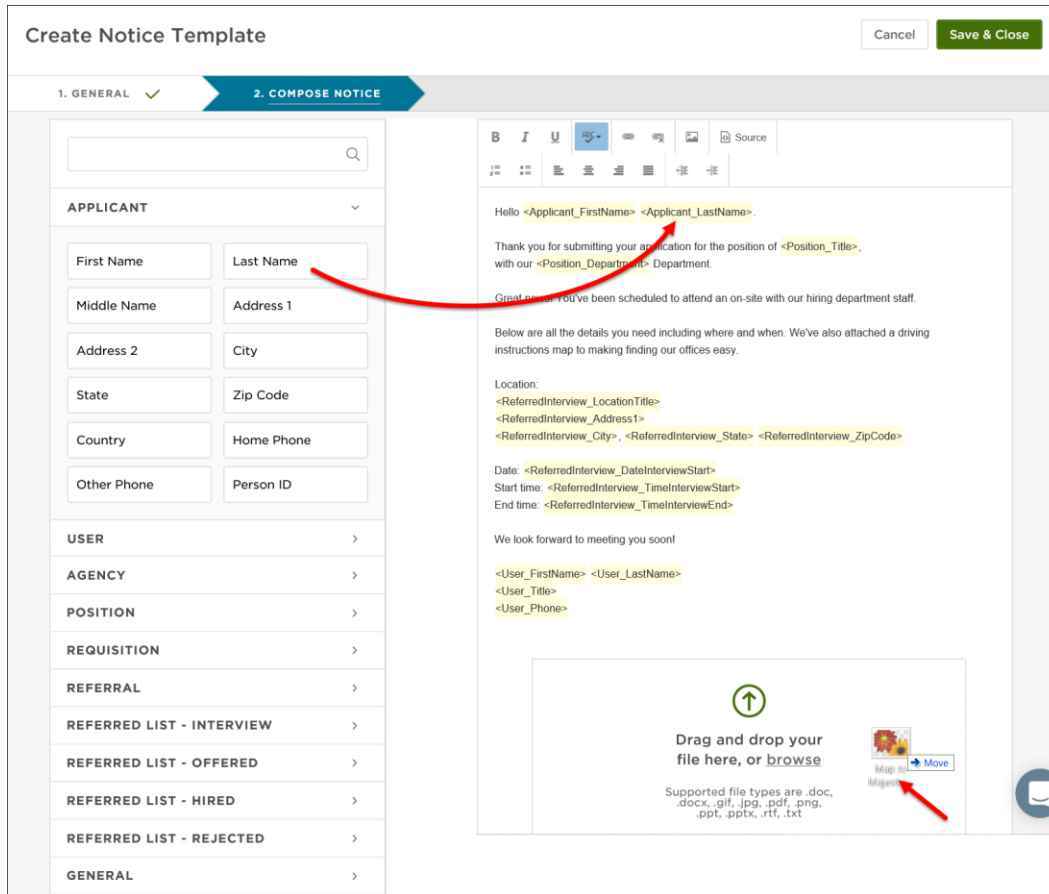


2. Click Notice Templates and click Add.
3. The first of two notice template pages will display.



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

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



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

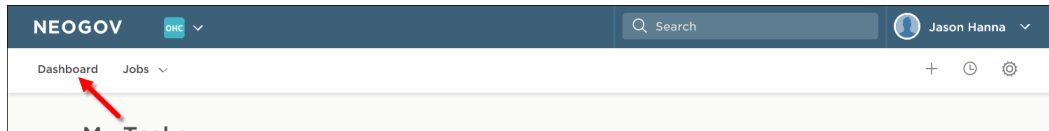
6. Once you're done, click Save & Close.

## Review the Referred List

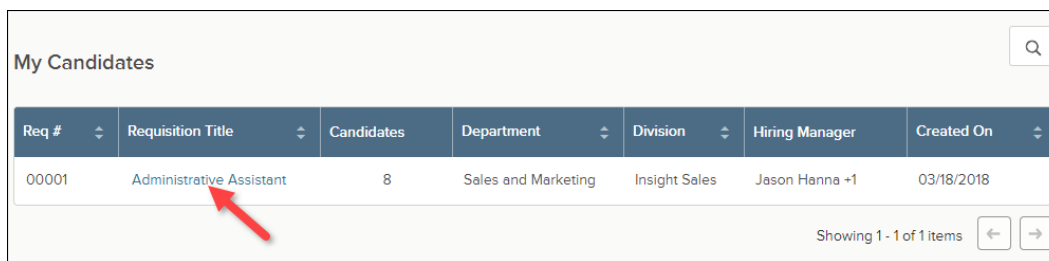
Up until now, you've been preparing to work with your referred list of candidates, e.g., schedule and/or confirm interview appointments, conduct interviews, enter results, etc. It's now time to have a closer look at the referred list.

### Steps to Review the Referred List

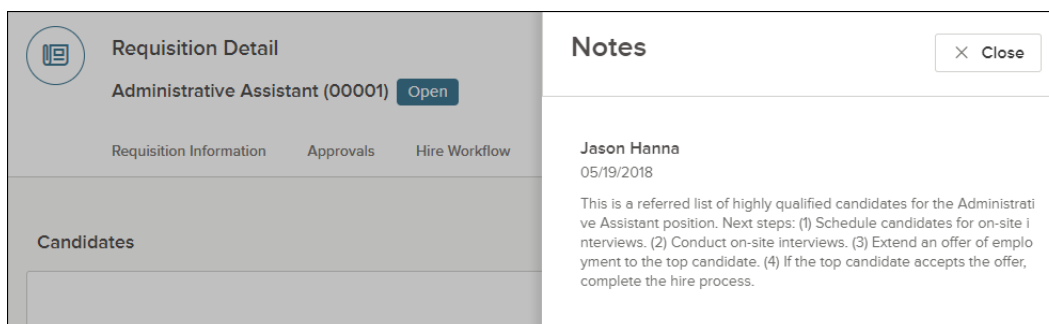
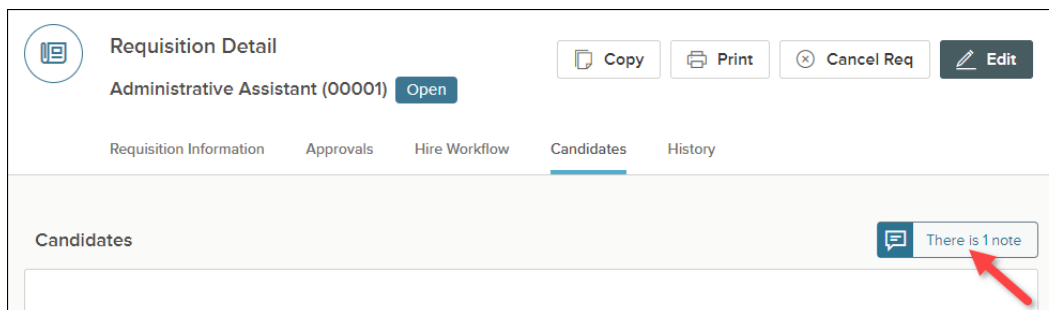
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.




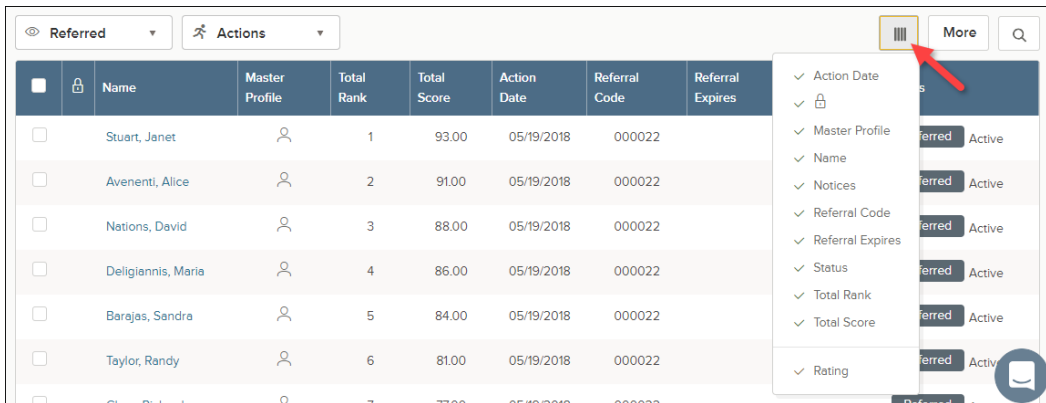
2. From the My Candidates section, click the referred list to review.



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



- Your Insight Administrator has configured the referred list's columns of data. If you prefer to display fewer columns, click  and deselect.



<input type="checkbox"/>	<input type="checkbox"/>	Name	Master Profile	Total Rank	Total Score	Action Date	Referral Code	Referral Expires
<input type="checkbox"/>	<input type="checkbox"/>	Stuart, Janet		1	93.00	05/19/2018	000022	
<input type="checkbox"/>	<input type="checkbox"/>	Avenenti, Alice		2	91.00	05/19/2018	000022	
<input type="checkbox"/>	<input type="checkbox"/>	Nations, David		3	88.00	05/19/2018	000022	
<input type="checkbox"/>	<input type="checkbox"/>	Deligiannis, Maria		4	86.00	05/19/2018	000022	
<input type="checkbox"/>	<input type="checkbox"/>	Barajas, Sandra		5	84.00	05/19/2018	000022	
<input type="checkbox"/>	<input type="checkbox"/>	Taylor, Randy		6	81.00	05/19/2018	000022	

- Once you're done, you have the option of either printing or exporting the referred list. To print the referred list, simply click Print. This will render a new web browser page to display the Referred List Report. Press Ctrl+P on your keyboard to print.

## Referred List Report

### Requisition Information

Requisition Number 00001	Division Insight Sales	New Position No
Department Sales and Marketing	Class Title Administrative Assistant (5360)	Position # 000365
Working Title Administrative Assistant	Job Type Full time, permanent	Vacancy Date 11/30/2018
Vacancies 1	Desired Start Date 12/03/2018	Name Sally Smith
List Type Regular	Hiring Manager Jason Hanna, Cheryl Ward	

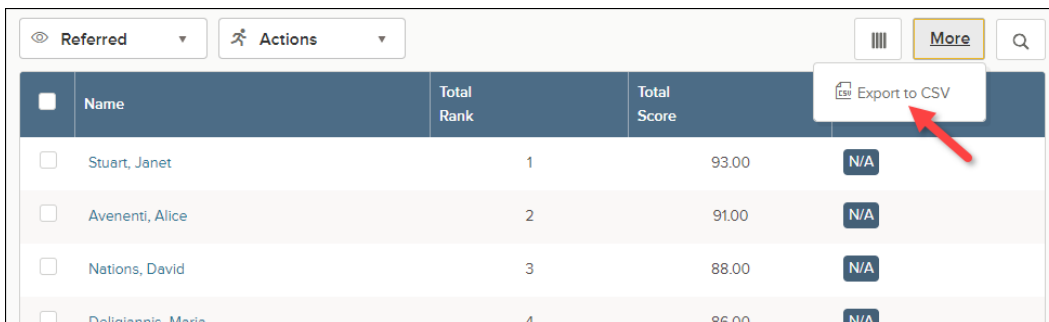
Name	Total Rank	Total Score	Action Date	Rating
Stuart, Janet	1	93.00	05/19/2018	N/A
Avenenti, Alice	2	91.00	05/19/2018	N/A
Nations, David	3	88.00	05/19/2018	N/A
Deligiannis, Maria	4	86.00	05/19/2018	N/A

- Close the report page to return back to the referred list.

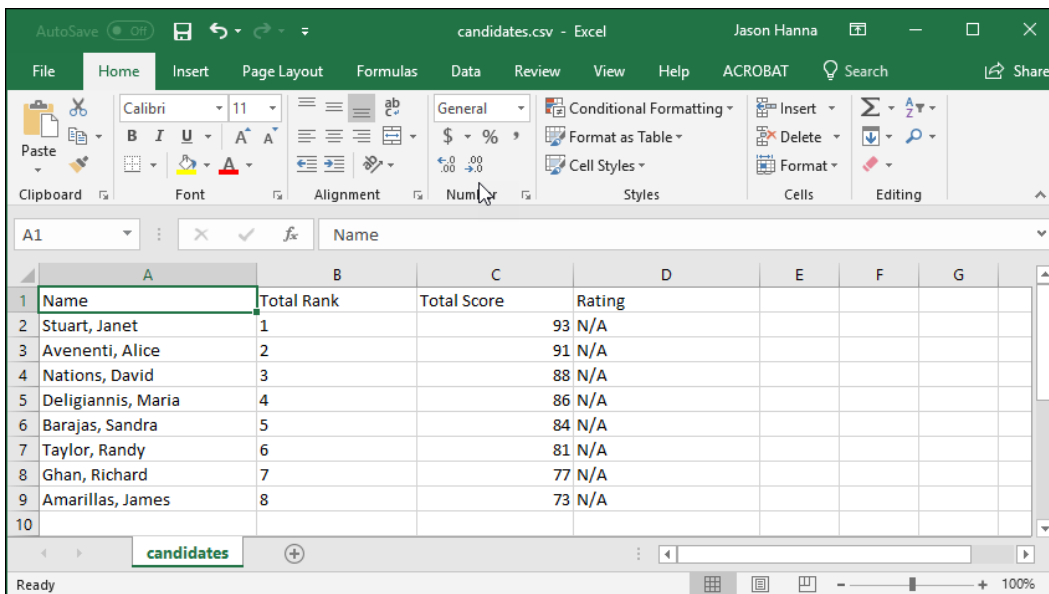
- Exporting the referred list also takes place from the same page. Select the candidates to be exported.



- On the More menu, click Export to CSV.



- Save the export file to your preferred file location.
- Once you're done, open the export file!



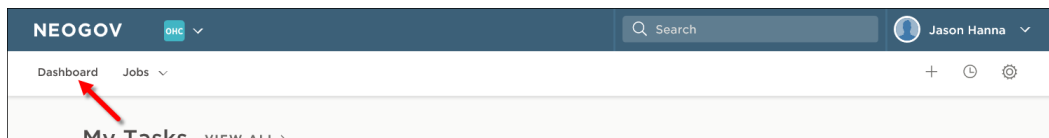
## Schedule Interviews

It's now time to move your candidates to the interview step! If you're using self-scheduling, all you need to do is move the candidates to the interview step. If you're not using self-scheduling, you'll need to schedule candidates after moving them to the interview step. In either case, you'll want to send them a notice about self-scheduling or their assigned interview appointments. That process detailed in the upcoming, *Send Notices* section.

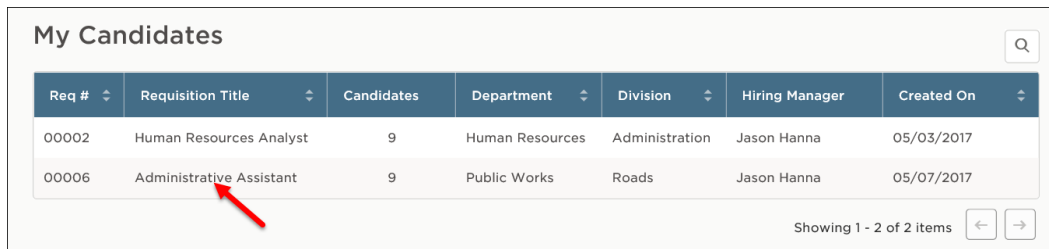
Required OHC role: With the OHC role of Hiring Manager or HR Liaison you can schedule interviews.

### Steps to Schedule Interviews

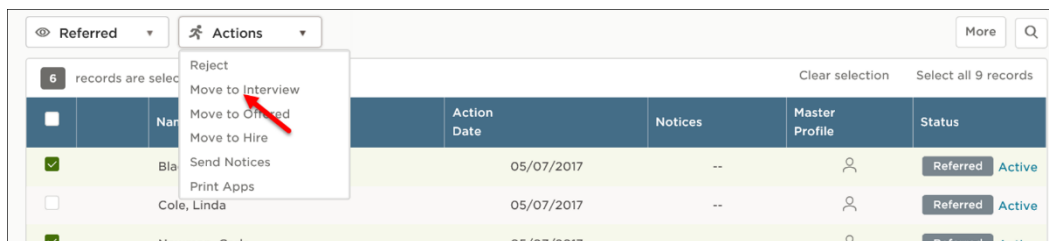
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



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



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



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

5. Click OK to confirm moving the candidates.

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

Referred : 3

9 TOTAL

Interview : 6

Referred

Actions

More

All Candidates

Offered

Interview

Hired

Rejected

Name	Action Date	Notices	Master Profile	Status
ole, Linda	05/07/2017	--	👤	Referred Active
tern, Phillip	05/07/2017	--	👤	Referred Active
Walker, Michael	05/07/2017	--	👤	Referred Active

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

Name	Action Date	Notices	Master Profile	Status	Rating
Blackburn, Gordon	05/08/2017	--	👤	Interview <b>Unscheduled</b>	No Rating
Newman, Carla	05/08/2017	--	👤	Interview <b>Unscheduled</b>	No Rating
Ortman, Julia	05/08/2017	--	👤	Interview <b>Unscheduled</b>	No Rating

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

### Interview Details

Interview Date \*

Location

Start Time  to End Time

Interviewer  Select an interviewer

Pacific Time (US & Canada); Tijuana

October 17, 2017 Today Month Week Day



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

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

## Send Notices

Great news! There's no need to send emails to candidates from your mail client. You can send them directly from the OHC! A few examples of notices may include, self-schedule interview, assigned interview appointment and interview/assessment results.

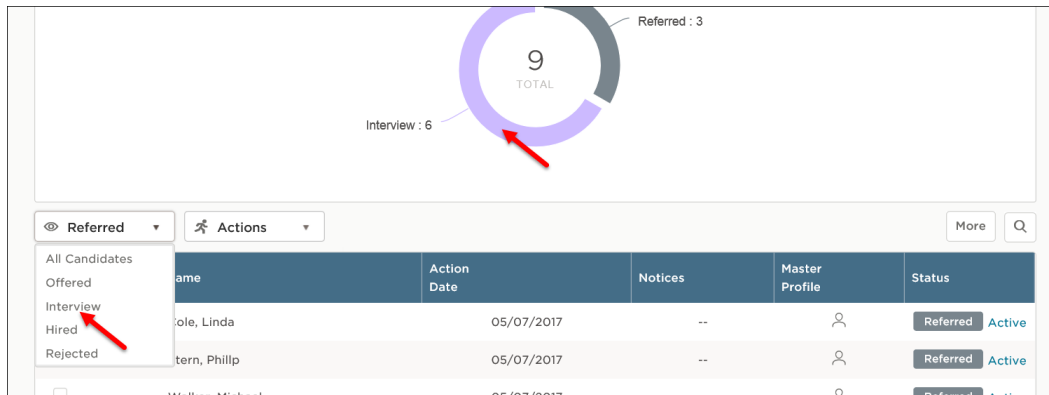
Required OHC role and permission: With the OHC role of Hiring Manager or HR Liaison and the OHC permission of Send OHC Notices, you can send notices.

## Steps to Send Notices

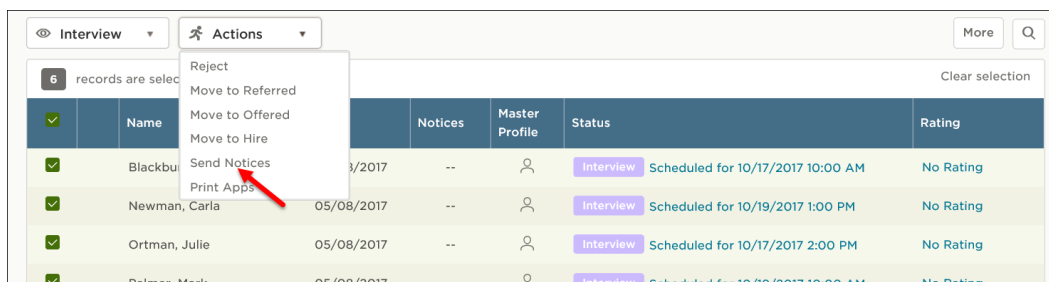
- If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

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

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

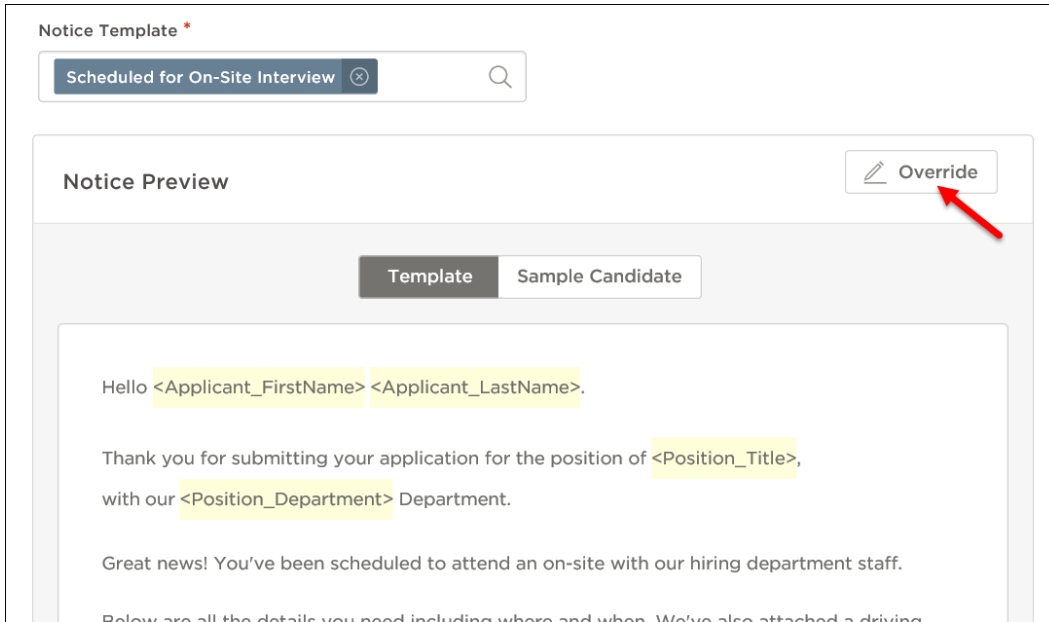


3. Select the candidates to receive notices.
4. On the Actions menu, click Send Notices.

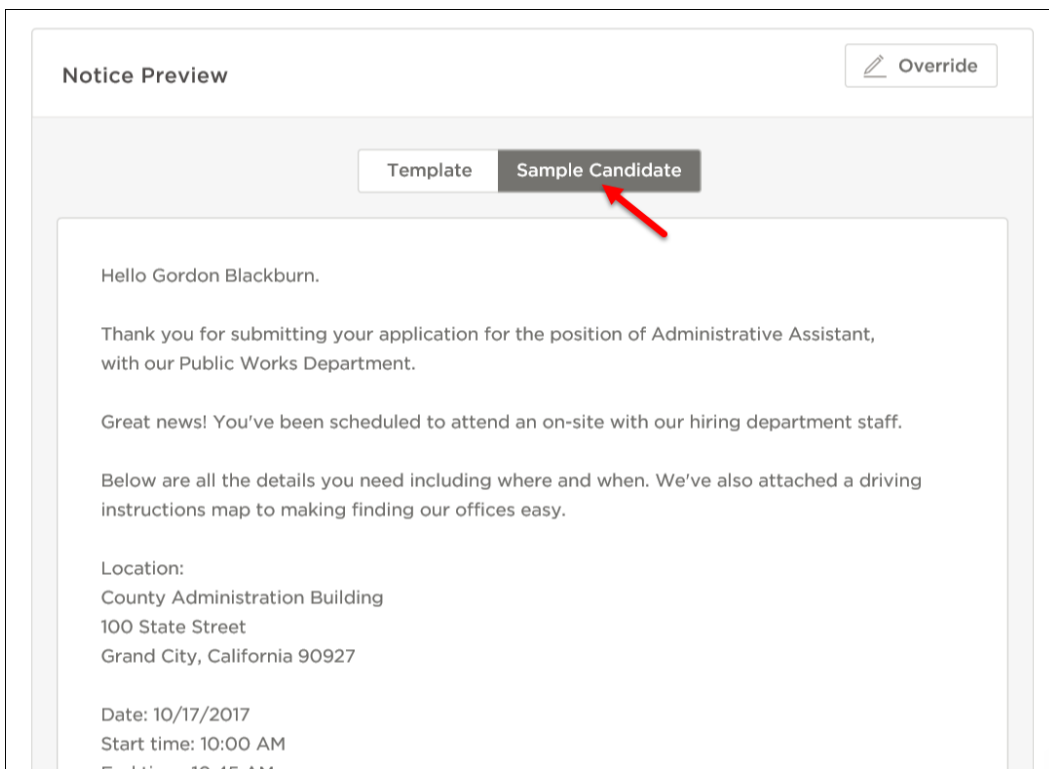


5. Select a notice template.

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



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

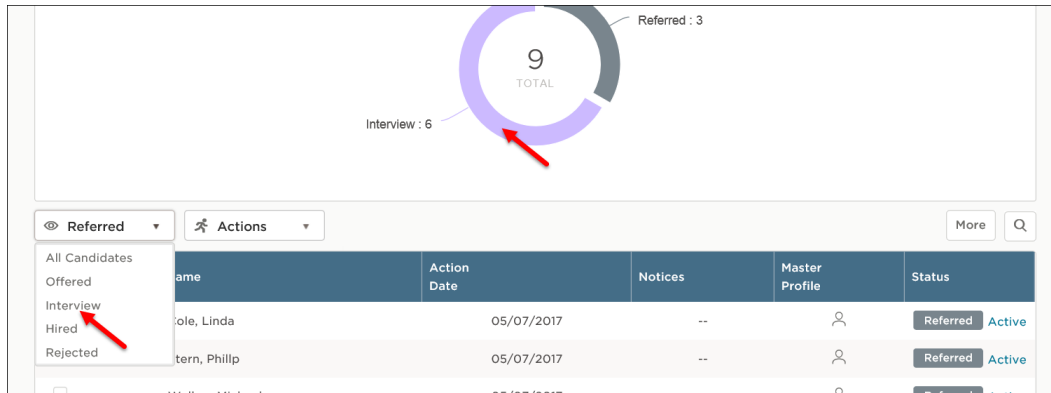


8. Click Send to send the notice to all selected candidates.

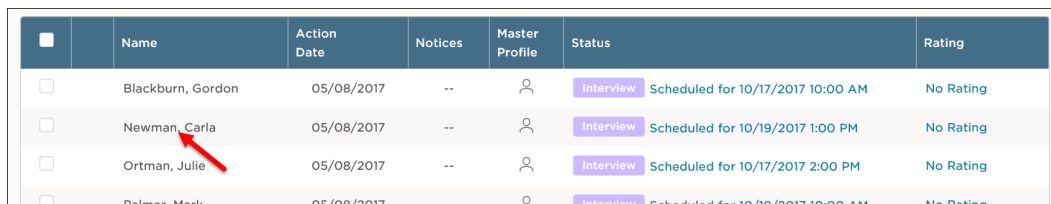
## Steps to Send an Individual Notice

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

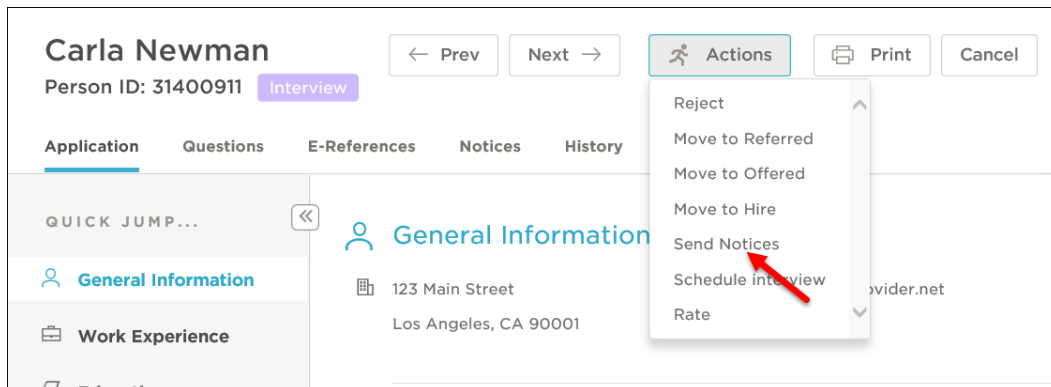
1. Go to your referred list.
2. On the doughnut chart or on the Candidates menu, click the step name a candidate requires a notification.



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

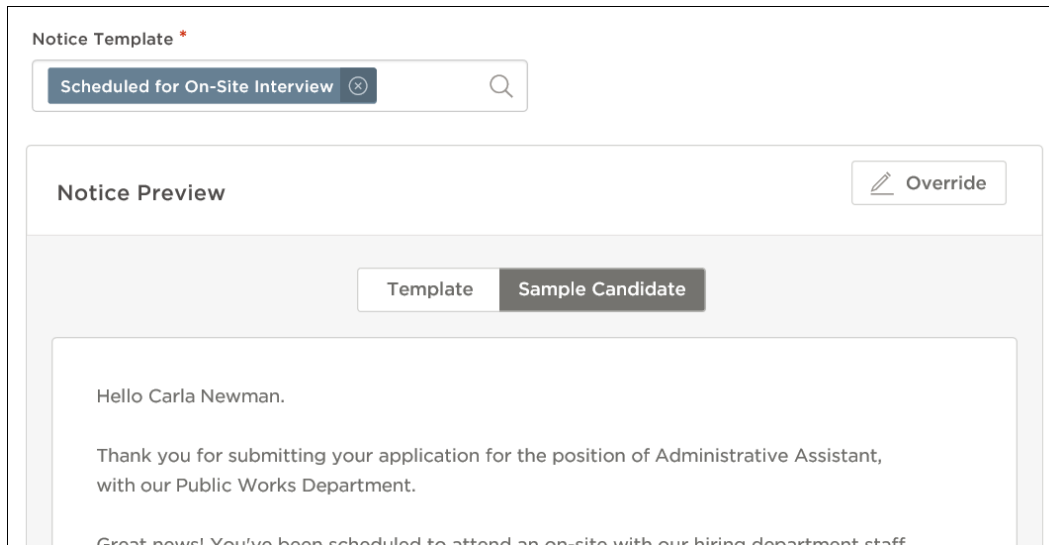


4. On the Actions menu, click Send Notices.



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

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



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

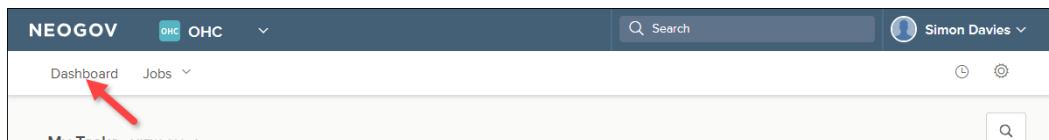
## Complete a Rating

If you've been tasked with completing a rating for one or more candidates, you will receive an email notification and the task will appear in the My Tasks section of your dashboard. Depending on the scoring method setup, you will rate based on a star rating, pass/fail, or a numeric score value.

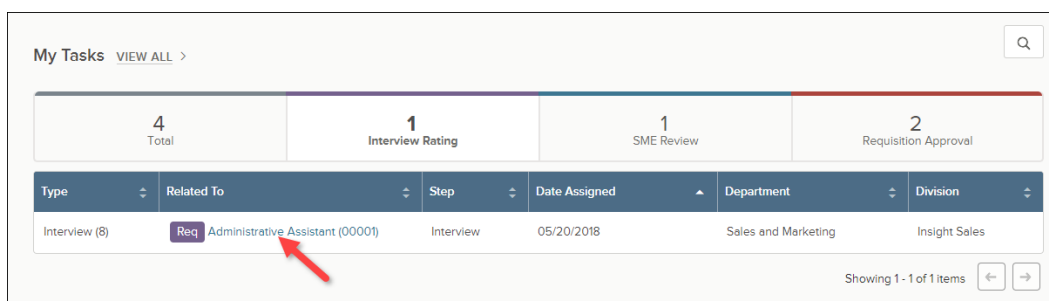
Required OHC role: With the OHC role of Rater, you can complete a rating.

## Steps to Complete a Rating

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



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



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

Interview  
Administrative Assistant (Requisition Number : 00001)

Requisition	Administrative Assistant	Requisition Number	00001	At Step	Interview
Evaluate Using	Percentage	Max Score	100	Passing Score	70

Candidates

Person ID	Candidate Name	Last Reviewer	Last Reviewed	My Score	Average Score
21099745	Amarillas, James			--	--
21987330	Avenenti, Alice			--	--
21099742	Baizer, Sandra			--	--

4. Depending on how the step is configured, this can be a pass or fail, a star rating, or a numeric value. Also, enter any comments and click Submit. The next candidate pending your review will display.

Amarillas, James  
Person ID: 21099745

Application Questions E-References

General Information

Contact Information

123 First Street  
Springfield, IL 62702  
US  
(888)555-5555 primary  
(888)555-5555 alternate

Personal Information

Date of Birth

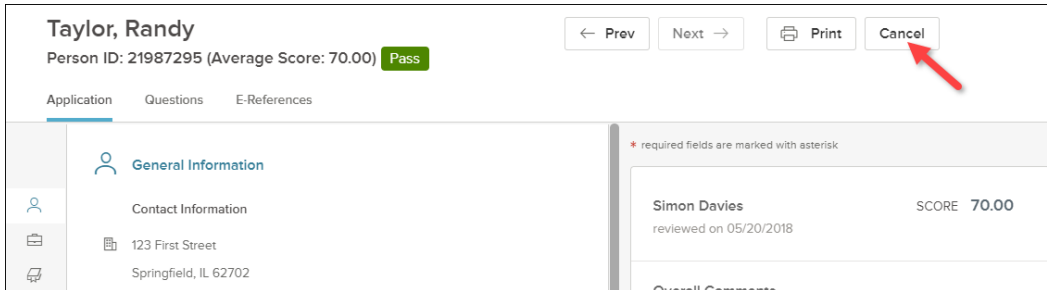
Simon Davies \* 90.00

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

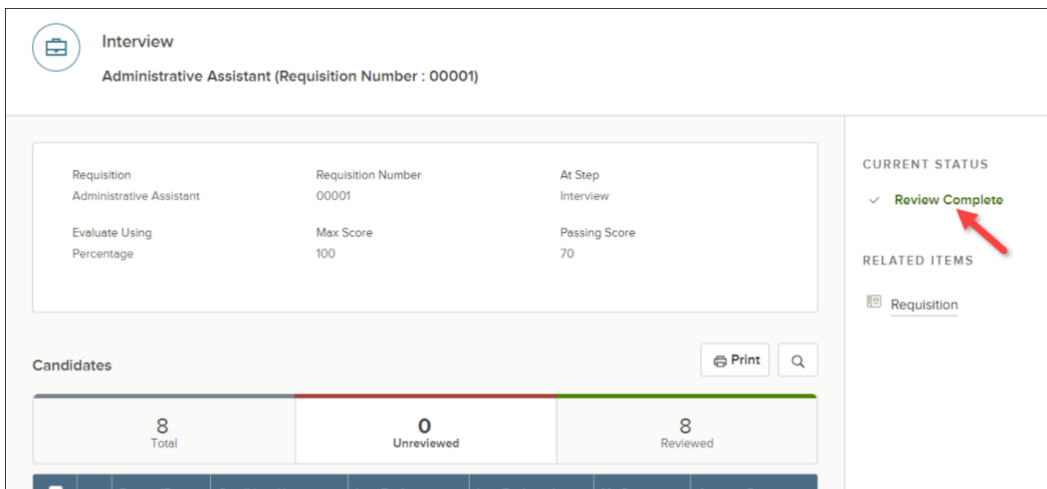
Submit

Note: Once a rater submits a rating it is locked and cannot be changed. If a rating must be changed, an OHC user with the role of Hiring Manager or HR Liaison can complete the changes on behalf of the rater or send the rating back to the rater. The process of sending back unlocks the rating, allowing for the rater to complete changes.

5. Repeat these rating steps for all remaining candidates. Click Cancel or click anywhere to the left of the last candidate's application review page.



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



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

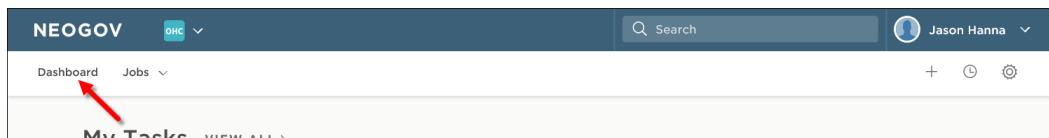
## Create Candidate Notes

While evaluating candidates, taking notes along the way is crucial. From a general application review to an on-site interview; each candidate’s application record has a notes section for you to accurately document the moment.

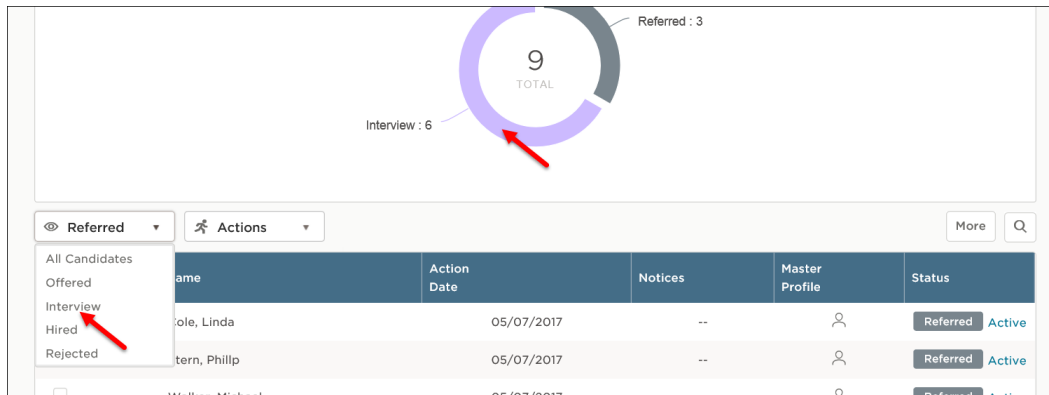
Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can create notes about the candidates you evaluate.

### Steps to Create Candidate Notes

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



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



3. Click the name the candidate to view their application record.

	Name	Action Date	Notices	Master Profile	Status	Rating
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--		Interview Scheduled for 10/17/2017 1...	Fail 60.00%
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		Interview Scheduled for 10/19/2017 1...	Pass 90.00%
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--		Interview Scheduled for 10/17/2017 2:...	Pass 75.00%
<input type="checkbox"/>	Palmer, Mark	05/08/2017	--		Interview Scheduled for 10/18/2017 1...	Pass 85.00%

4. Click the Notes tab.



- From the New Note section, enter your note and then click Save Note.

The screenshot shows the 'Notes' tab for candidate Carla Newman (Person ID: 32145502). The interface includes a top navigation bar with 'Application', 'Questions', 'E-References', 'Notices', 'History', and 'Notes'. A 'Candidate Notes' section on the left displays 'No notes found for this candidate.' On the right, the '+ NEW NOTE' section features a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, and Source. The text area contains the note: 'Carla interviewed very well with the hiring committee. She has a wealth of recent experience in the field.' Below the text area are 'Save Note' and 'Cancel' buttons.

The note will be logged with a date/time stamp. You can return back at any time to view, edit or delete the note.

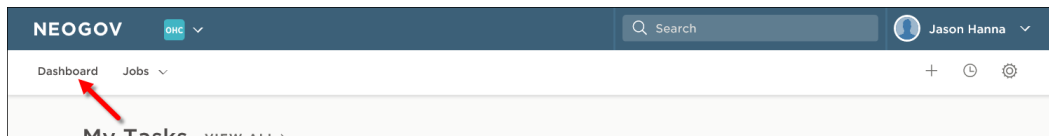
The screenshot shows the 'Notes' tab for candidate Carla Newman (Person ID: 32145502). The 'Candidate Notes (1)' section now displays a note from Jason Hanna, left on 9/29/2017 at 2:45 PM. The note text is: 'Carla interviewed very well with the hiring committee. She has a wealth of recent experience in the field.' The note is accompanied by a user profile icon and edit/delete icons. The '+ NEW NOTE' section on the right is empty, with the 'Save Note' and 'Cancel' buttons still visible.

## Reject a Candidate

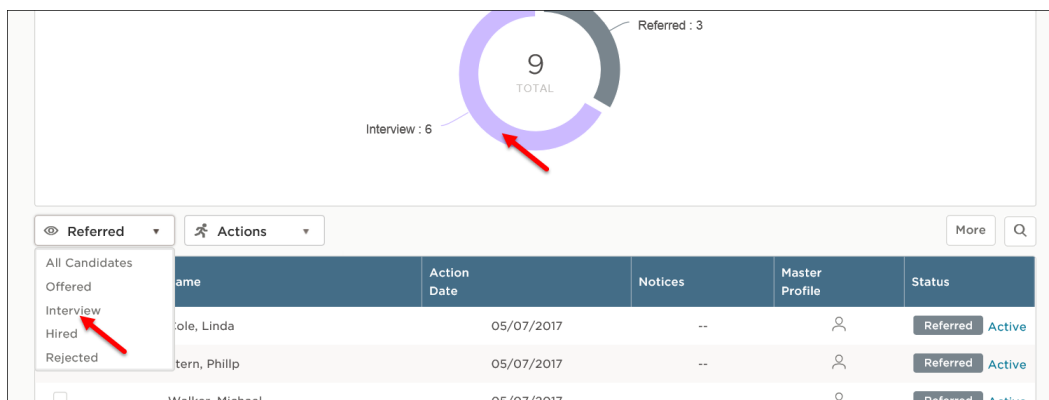
Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can reject a candidate.

### Steps to Reject a Candidate

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



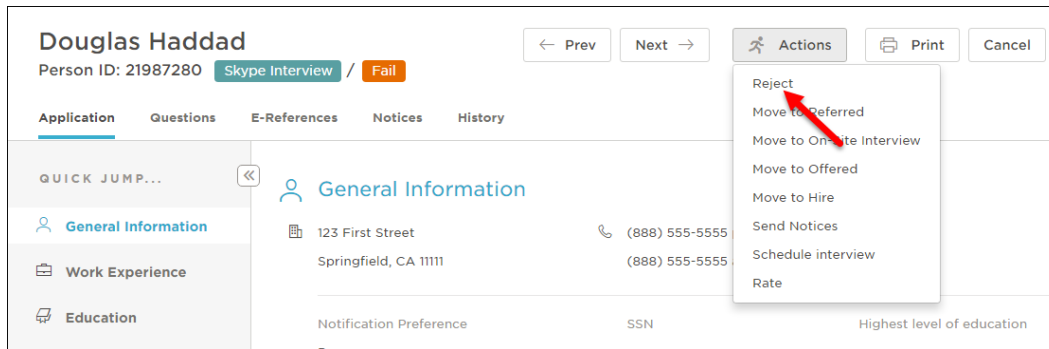
2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and determined one or more will be rejected.




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

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

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

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

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

### Reject Details

Reject Reason \*

Not best qualified

Comments

Gordon did not pass the on-site interview process.

### Notice

Automatically send a notice

Send email to the candidate(s) immediately after rejection

Notice Template \*

Not Best Qualified

#### Notice Preview

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

Override

10. Once you're done, click Save.

11. Repeat these steps for any remaining rejected candidates.

## Steps to Reject Candidates in Bulk

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

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

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

Showing 1 - 2 of 2 items

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

Action Date	Notices	Master Profile	Status
05/07/2017	--		Referred Active
05/07/2017	--		Referred Active
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, check out the upcoming, *Send Rejection Notices in Bulk* section.

8. If a notice template is not linked to your reject reason, select the proper notice template
9. If necessary, click Override to make a one-time update to the notice prior to sending.

**Reject** 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

Override

10. Once you're done, click Save.
11. Repeat these steps for any remaining rounds of rejected candidates.

## Send Rejection Notices in Bulk

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

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



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

Showing 1 - 2 of 2 items

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



Name	Requisition Title	Notices	Master Profile	Status
Black		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. Pre-selected notice templates will display based on the reject reason. If one or more reject reasons do not have associated notice templates, select them at this time.

The screenshot shows the 'Send Notice' interface with a table of reject reasons and their associated templates. A dropdown menu is open for the 'No show for interview' row, showing options: 'Interviewed But Not Selected', 'No Show for Interview' (highlighted with a red arrow), 'Not Best Qualified', and 'Schedule Notice'. The 'Override' and 'Preview' buttons are visible for each row.

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

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

The screenshot shows the 'Send Notice' interface with the 'Override' button for the 'No show for interview' row highlighted with a red arrow. The dropdown menu is now closed, and the selected template 'No Show for Interview' is displayed in the 'TEMPLATE' column.

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

7. Once you're done, click Send.



## Make an Offer

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

### Steps to Make an Offer

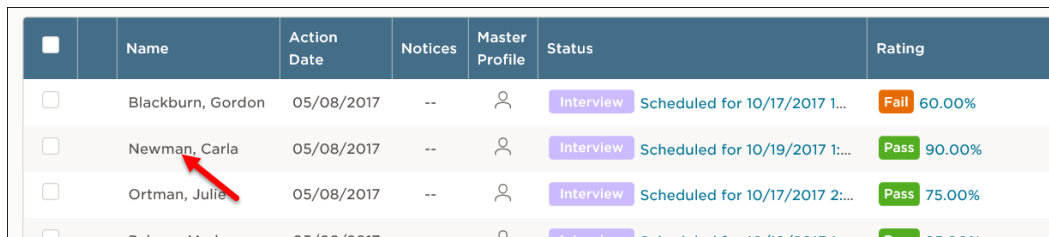
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.



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

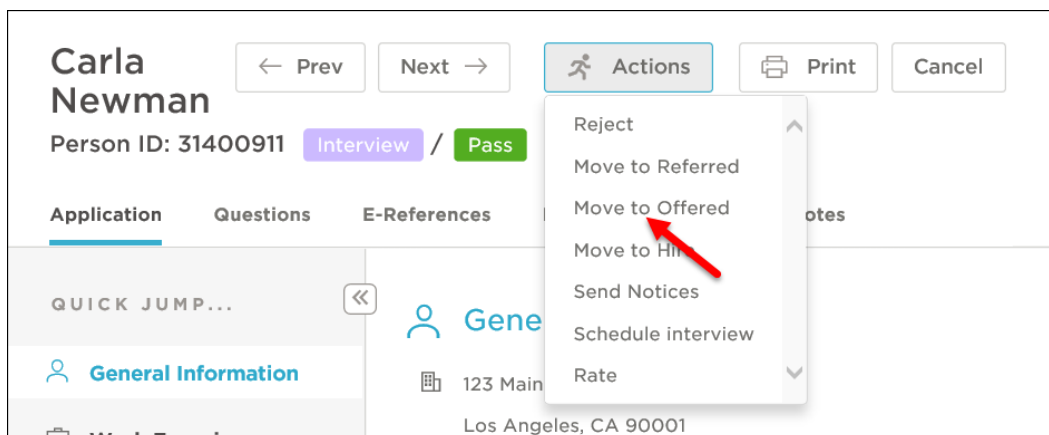
Showing 1 - 2 of 2 items

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



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

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



**Carla Newman**  
Person ID: 31400911 Interview / Pass

Application Questions E-References

QUICK JUMP... <<

General Information 123 Main Los Angeles, CA 90001

Work Experience

Actions menu options:  
Reject  
Move to Referred  
Move to Offered  
Move to Hire  
Send Notices  
Schedule interview  
Rate

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

### Make Offer

Carla Newman (Person ID : 31400911)

[Cancel](#) [Save & Submit](#)

#### Offer Details

Offer Date \*

Offer Amount

Bonus Amount

Comment

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

## Steps to Update Offer Status

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

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

### My Candidates

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

Showing 1 - 2 of 2 items

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

Rejected : 3

9 TOTAL

Interview : 5

Offered : 1

Interview

Actions

More

All Candidates

Referred

Offered

Hired

Rejected

Name	Action Date	Notices	Master Profile	Status	Rating
n, Gordon	05/08/2017	--		Interview Scheduled for 10/17/2017 1...	Fail 60.00%
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%

- From the Status column, click Pending.

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

Items per page 10

Showing 1 - 1 of 1 items

- Click Edit and either Accepted or Rejected.
- Enter the response date and any additional details.

### Make Offer

Carla Newman (Person ID : 31400911)

Cancel Save & Submit

Accepted
  Rejected
  Answer Pending

#### Offer Details

Offer Date \*

10/24/2017

Offer Response Date

10/25/2017

Offer Amount

\$ 50000.00

Bonus Amount

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

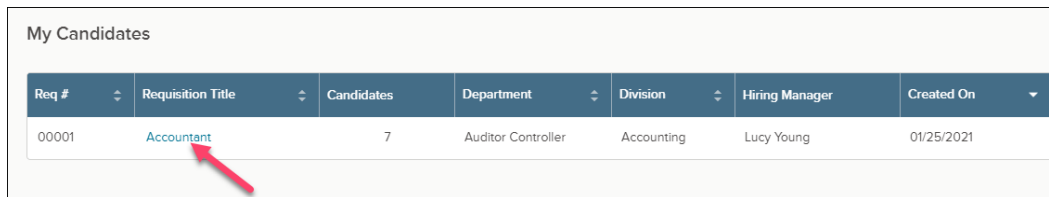
## Make an Offer With Approvals

Your organization may require an offer of employment to go through an approval workflow prior to being sent to the preferred candidate.

Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can make an offer with approvals.

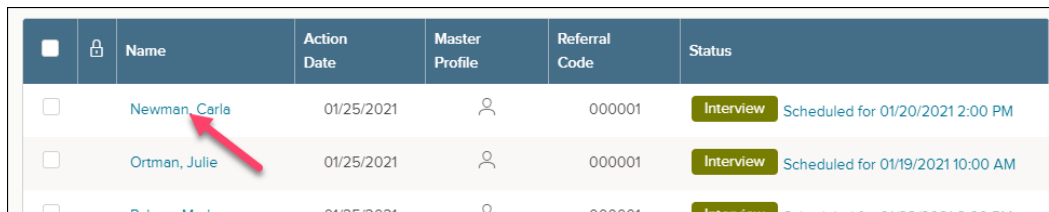
### Steps to Make an Offer With Approvals

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



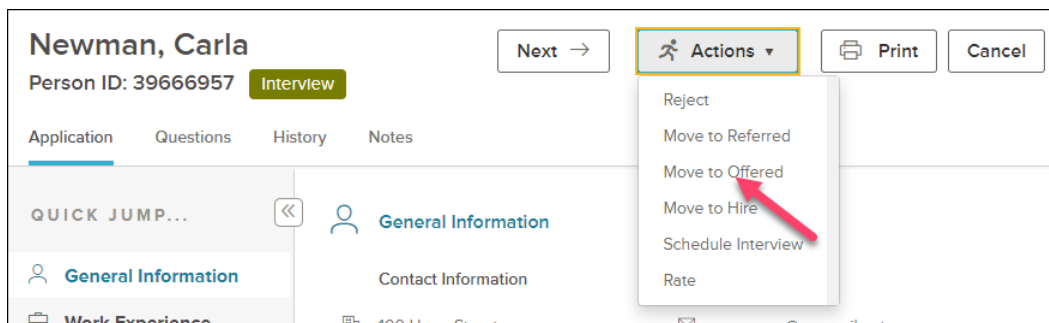
Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00001	Accountant	7	Auditor Controller	Accounting	Lucy Young	01/25/2021

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



Name	Action Date	Master Profile	Referral Code	Status
Newman, Carla	01/25/2021		000001	Interview Scheduled for 01/20/2021 2:00 PM
Ortman, Julie	01/25/2021		000001	Interview Scheduled for 01/19/2021 10:00 AM

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



**Newman, Carla** Next → Actions ▼ Print Cancel

Person ID: 39666957 Interview

Application Questions History Notes

QUICK JUMP... General Information

General Information Contact Information

Work Experience 100 Hope Street carnewman@xyz-mail.net

- Reject
- Move to Referred
- Move to Offered
- Move to Hire
- Schedule Interview
- Rate

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

**Offer Approval Form** Cancel Save & Close Save & Continue to Next Step

Newman, Carla (Person ID : 39666957)

**1. OFFER INFORMATION** | 2. APPROVALS | 3. ATTACHMENTS

**Offer Details**  
\* required fields are marked with asterisk

**Position**  
Accountant (10006) Preview

**Offer Date \***  
01/25/2021

**Offer Amount**  
\$ 75000.00

**Frequency**  
Annually

**Bonus Amount**  
\$

**Expected Start Date**  
05/01/2021


6. Once you're done, click Save & Continue to Next Step.
7. If you have an approval workflow template, it will display on the second offer form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes will only be applied to this offer, not the saved approval workflow template.

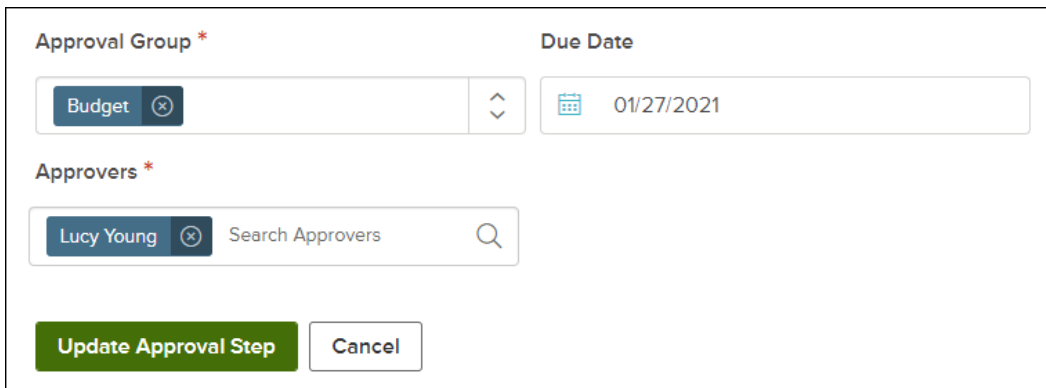
**Approval Workflow**  
\* required fields are marked with asterisk

The approval workflow below has been automatically applied to this offer based on the Department/Division. You have the option to override the workflow for this offer

	Budget	Approvers	Status	Due Date	Comments	
1		Lucy Young	Pending...			
2	HR	Harper Evans , + 1 more	Pending...			
3	County Admini...	Karen Beckett	Pending...			

[Add Approval Group](#)

8. 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.



Approval Group \*

Budget

Due Date

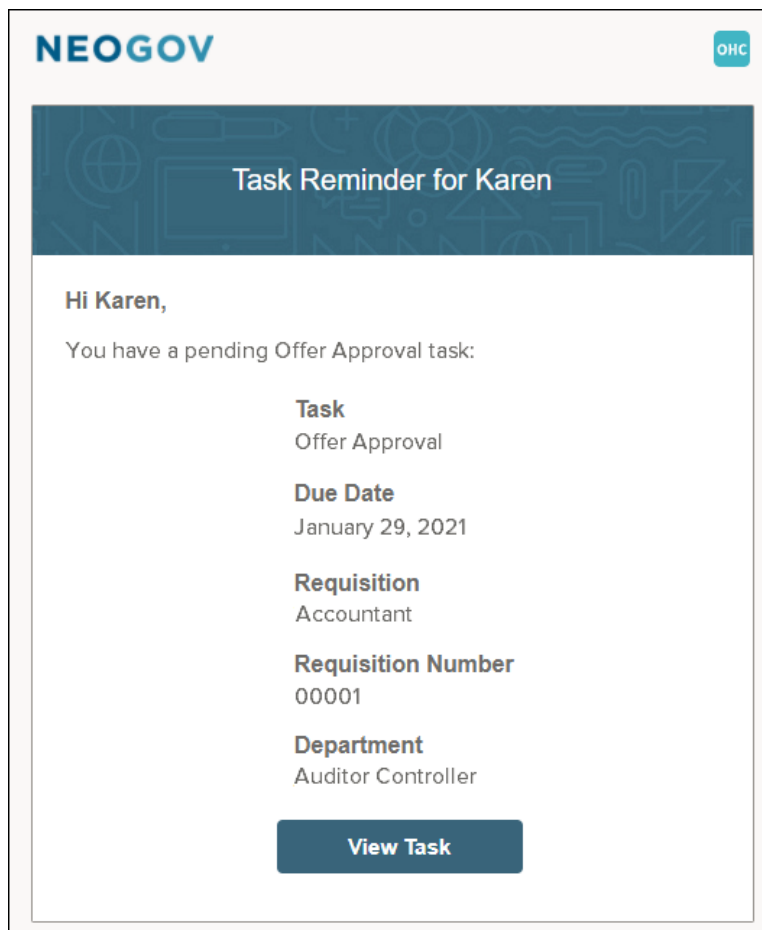
01/27/2021

Approvers \*


Lucy Young Search Approvers

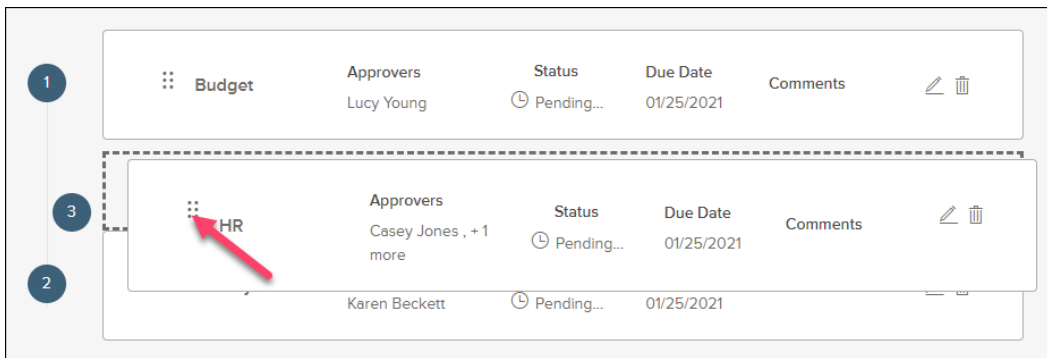
Update Approval Step Cancel

9. 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 day 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.



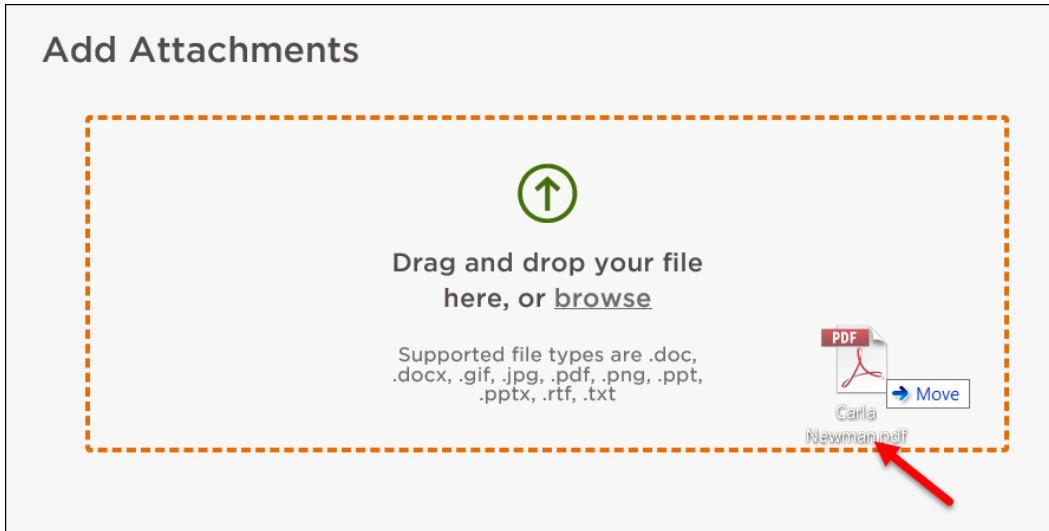
Note: Task reminder emails, such as the offer approval reminder, must be enabled by an Insight Administrator (Insight navigation: Admin > Agency Preferences > OHC section).

10. If a template for your department/division does not exist, you will be prompted to create an approval workflow. You have two options: (1) Create an approval workflow. (2) Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.
11. On the Approval Group pulldown, click the applicable approval group.
12. From the Approvers field, click , select the applicable approvers, and then click Done.
13. Click Add Approval Step.
14. Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.
15. Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop.



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

17. Drag any file attachments (e.g., draft offer letter and/or offer details) to the third offer form page and click Save & Submit.



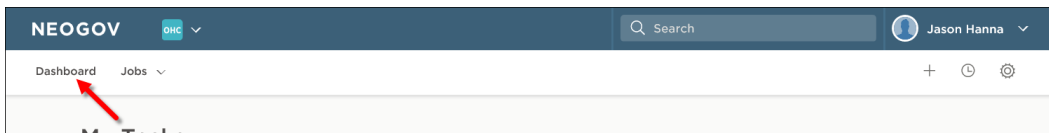
Note: If you're not quite ready to submit the offer, click Save & Close. The offer will display in your referred list with a pending release status. Once you're ready to submit, edit the offer, make any updates and click Save & Submit.

## Approve an Offer

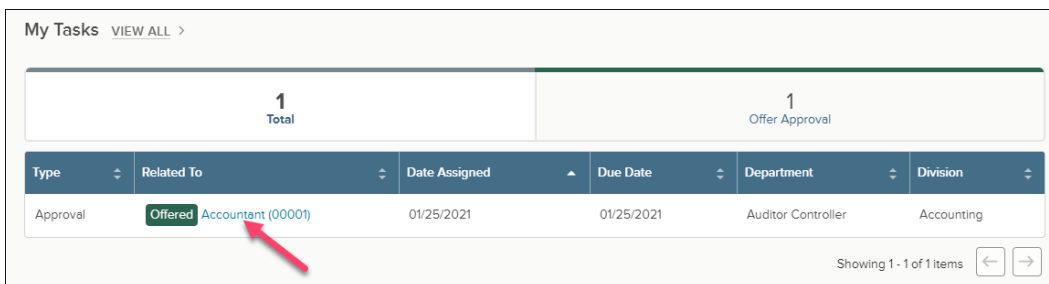
Required OHC role: With the OHC role of Approver, you can review an offer sent to you for approval.

### Steps to Approve an Offer

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



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





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

**Offer Approval**  
Carla Newman / Accountant (00001)

Cancel Edit

Approve Deny Submit

Comment (Optional)

We currently have allocated funds for this forthcoming hire. Approved!

**Candidate Information** View Application

Position Details  
Accountant (10006)

Person ID  
39666957

Candidate Name  
Carla Newman

Offered Date  
01/25/2021

**Approval Timeline**

Pending Due Date: 01/25/2021

Budget

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

**Note:** Approvers have the option of denying an offer. If this is done, the offer 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 offer approval process can be restarted.

**Offer Approval**  
Carla Newman / Accountant (00001)

Cancel Edit

Approve Deny Submit

\* required fields are marked with asterisk

Send Back to Step \*  
Hiring Manager - Lucy Young

Comment (Optional)

Be sure to use HR's recommended offer letter verbiage.

**Candidate Information** View Application

Position Details  
Accountant (10006)

Person ID  
39666957

Candidate Name  
Carla Newman

Offered Date  
01/25/2021

**Approval Timeline**

Today at 7:09 PM  
Lucy Young approved

## Make an e-Offer

The e-Offer feature automates allows you to send an offer letter directly to the preferred candidate through the system. The candidate is then able to login to their Governmentjobs.com profile to view the offer details and sign and accept or reject the offer. This feature must be enabled by your Insight Administrator.

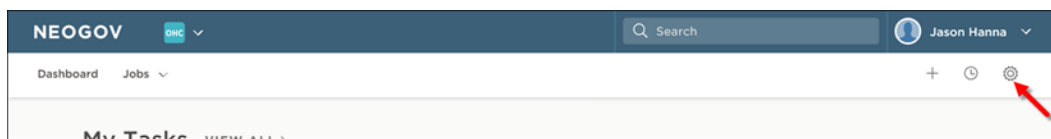
Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can make an e-Offer of employment for the preferred candidate.

## Steps to Create e-Offer Letter Templates

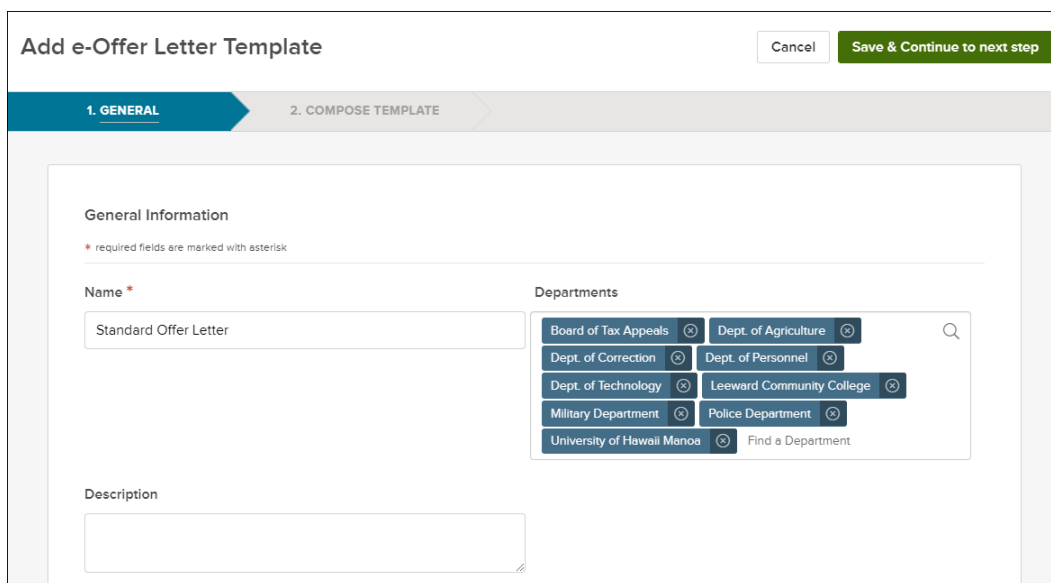
When the e-Offer feature is enabled, HR Liaisons can create and edit offer letter templates. By default, Hiring Managers do not have access to create and edit offer letter templates. However, Insight Administrators can grant them access by adjusting your OHC Security Roles settings.

To create an e-Offer Letter Template:

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

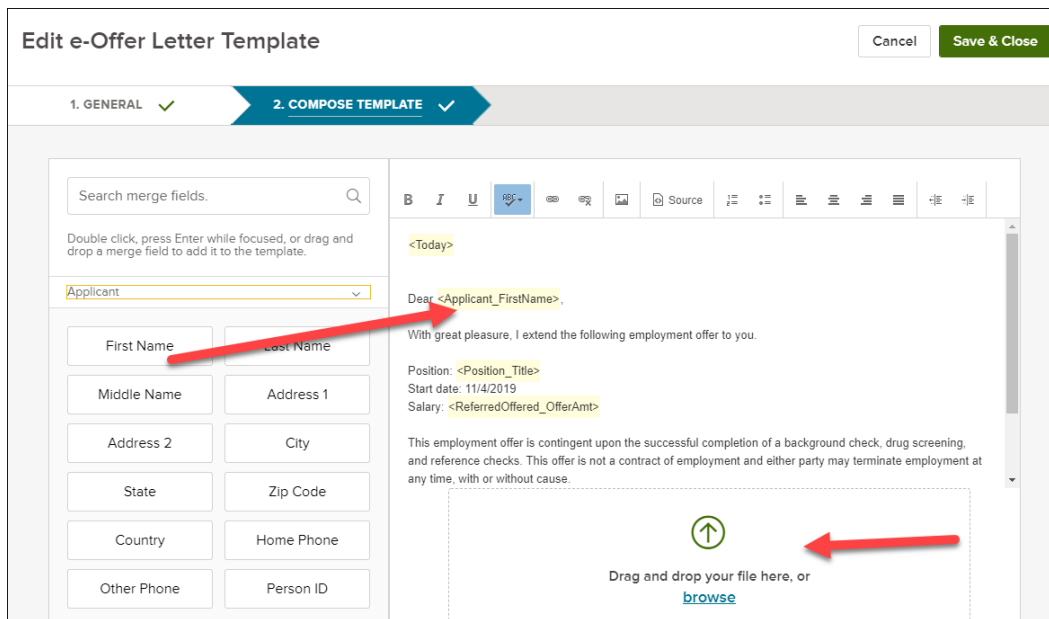


2. Click e-Offer and then click Add
3. The first of two e-Offer letter template pages will display.

A screenshot of the 'Add e-Offer Letter Template' form. The form has a title bar with 'Cancel' and 'Save & Continue to next step' buttons. Below the title bar, there are two tabs: '1. GENERAL' (active) and '2. COMPOSE TEMPLATE'. The 'GENERAL' tab contains a 'General Information' section with a note that '\* required fields are marked with asterisk'. There are two main input areas: 'Name \*' with a text box containing 'Standard Offer Letter', and 'Description' with a larger text area. To the right of the 'Name' field is a 'Departments' section with a search bar and a list of department buttons: Board of Tax Appeals, Dept. of Agriculture, Dept. of Correction, Dept. of Personnel, Dept. of Technology, Leeward Community College, Military Department, Police Department, and University of Hawaii Manoa. A 'Find a Department' link is also present.

4. Complete the e-Offer letter template form and click Save & Continue to Next Step.

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

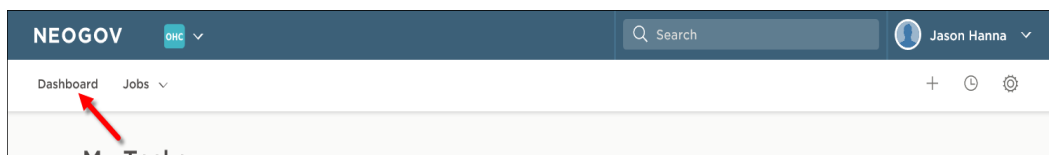


6. Once you're done, click Save & Close.

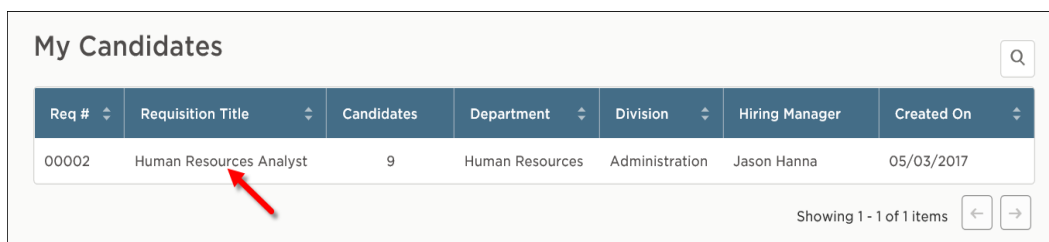
## Steps to Enable e-Offers in the Hire Workflow

In order to send candidates an e-Offer, the HR Liaison or Hiring Manager will need to customize the OHC hire workflow to enable the feature on the individual referred list.

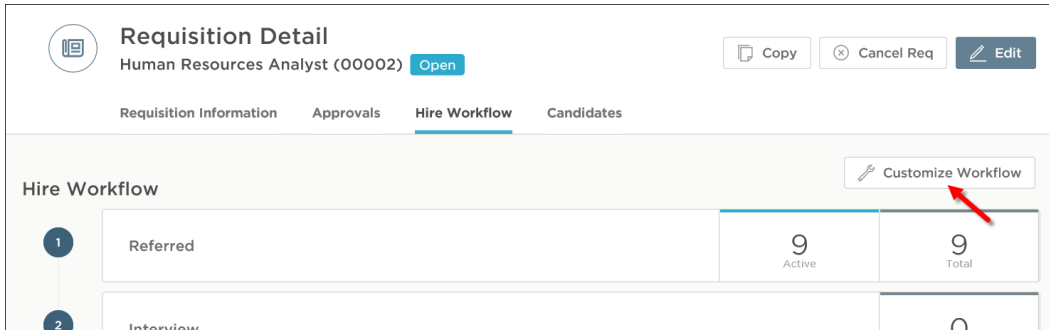
1. If you're not already viewing your OHC dashboard page, click Dashboard from the upper left.




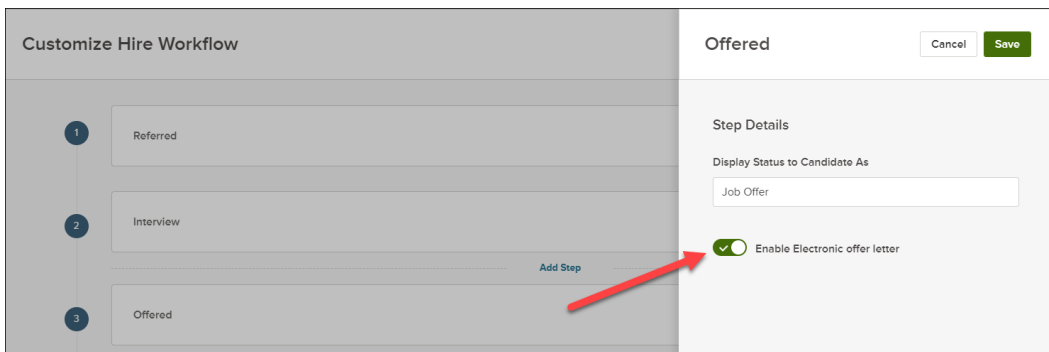
2. From the My Candidates section, click the referred list for which you want to enable e-Offers.



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



4. From the Offered step, click . Update the candidate status and toggle the Enable Electronic Offer Letter switch to the right.

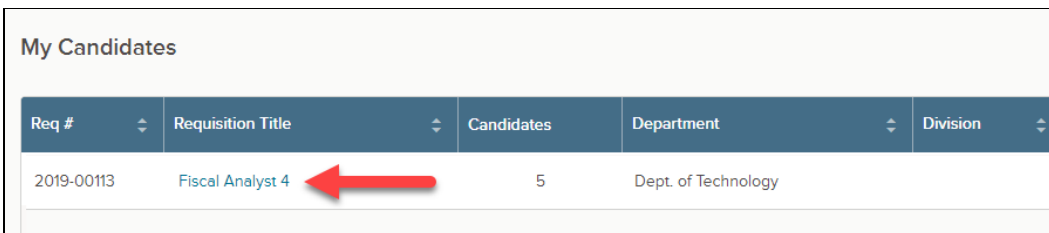


5. Click Save

## Steps to Send an e-Offer Letter

Now that you have created your offer letter template and enabled e-Offers in the hire workflow, you're ready to send the offer to the candidate.

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



- On the doughnut chart or on the Candidates menu, select the step name where the candidate to whom you want to make an offer currently resides.

Candidates

5 TOTAL

e-Offer : 2

Referred : 2

Interview : 1

Interview Actions

Phone	Person ID	Master Profile	Exam #	Job Title	Action Date	Referral Expires	Current Department*
(888)555-5555	24659325		2019-00113	Fiscal Analyst 4	10/08/2019	04/05/2020	

- Click the name the candidate to receive the offer.

Interview Actions

Name	Phone	Person ID	Master Profile	Exam #	Job Title	Action Date	Referral Expires
Rawlings, Jerald	(888)555-5555	28121279		2019-00113	Fiscal Analyst 4	10/08/2019	04/05/2020
Schwabe, Heather R	(888)555-5555	24659325		2019-00113	Fiscal Analyst 4	10/08/2019	04/05/2020

- On the Actions menu, click Send e-offer.

Rawlings, Jerald

Person ID: 28121279 Interview

Next → Actions Print Cancel

- Reject
- Move to Referred
- Move to Hire
- Send Notices
- Send e-offer
- Schedule Interview
- Rate

Application Questions E-References Notices History Notes

QUICK JUMP... General Information

General Information

Contact Information

123 First Street  
Springfield, WA 11111  
US

test2@test.com

(888)555-5555 primary  
(888)555-5555 alternate

5. Enter the offer date, offer due date, offer amount, and frequency (e.g., annually), and any additional details including bonus amount and comments.

The screenshot shows the 'Send e-Offer' interface. At the top, it displays 'REQUISITION POSITION: Fiscal Analyst 4 (2019-00113)' and 'CANDIDATE: Rawlings, Jerald'. Below this are two tabs: '1. OFFER DETAIL' (active) and '2. ELECTRONIC OFFER'. The 'Offer Detail' section contains the following fields:

- Offer Date \*: 10/08/2019
- Due Date \*: 10/11/2019
- Offer Amount \*: \$ 75000.00
- Frequency: Annually
- Bonus Amount: \$
- Comment: (empty text area)

Buttons for 'Cancel' and 'Next' are located in the top right corner.

6. Click Next
7. Select the appropriate offer letter template and review the text carefully. Click the Sample Candidate button to see a preview of exactly how the letter will appear to the candidate.

The screenshot shows the 'Send e-Offer' interface at Step 2: 'ELECTRONIC OFFER'. The '1. OFFER DETAIL' tab is now marked with a checkmark. The interface includes a search bar for 'Select Offer Letter Template \*' with 'Standard Offer Letter' selected. A red arrow points to this selection. Below the search bar, there are two buttons: 'Template View Mode' and 'Sample Candidate'. The 'Sample Candidate' button is highlighted. The main preview area shows a letter template with the following text:

10/8/2019  
Dear Jerald,  
With great pleasure, I extend the following employment offer to you.  
Position: Fiscal Analyst 4  
Start date: 11/4/2019  
Salary: 75,000.00  
This employment offer is contingent upon the successful completion of a background check, drug screening, and reference checks. This offer is not a contract of employment and either party may terminate employment at any time, with or without cause.  
Sincerely,


An 'ATTACHMENTS' section is visible on the right side of the preview area. Buttons for 'Cancel' and 'Send e-offer' are in the top right corner.

8. Click Send e-offer.

## Steps to Review Offer Status

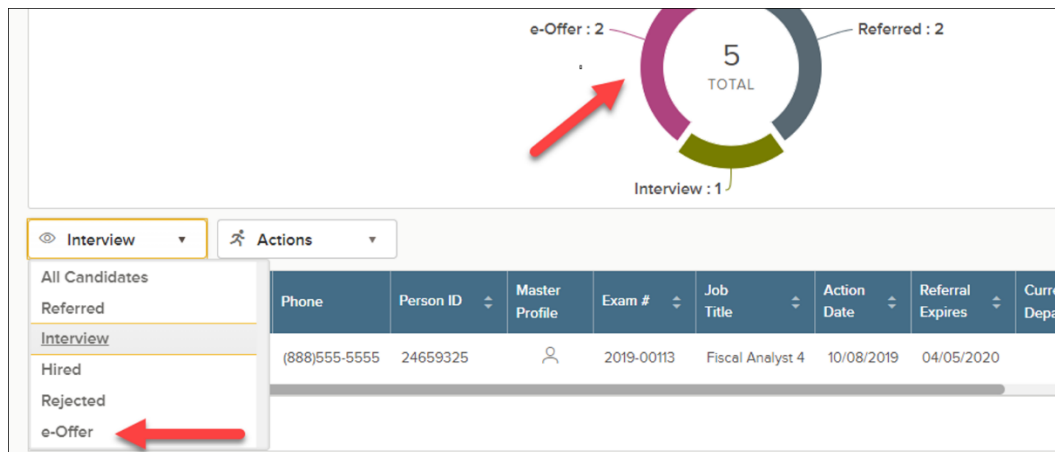
When a candidate accepts or rejects an offer, the hiring manager(s) assigned to the requisition will receive an email. To check the status of an offer:

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



Req #	Requisition Title	Candidates	Department	Division
2019-00113	Fiscal Analyst 4	5	Dept. of Technology	

2. On the doughnut chart or on the Candidates menu, select the e-Offer step.

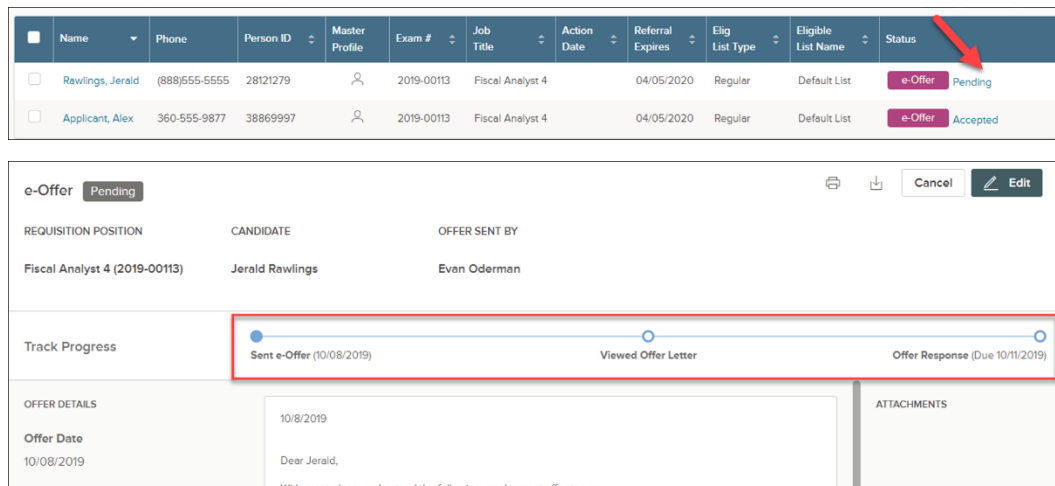


e-Offer : 2  
5 TOTAL  
Interview : 1  
Referred : 2

Interview Actions

Phone	Person ID	Master Profile	Exam #	Job Title	Action Date	Referral Expires	Current
(888)555-5555	24659325		2019-00113	Fiscal Analyst 4	10/08/2019	04/05/2020	

3. From the Status column, click on the current status. The progress bar displays the current status of the offer.



Name	Phone	Person ID	Master Profile	Exam #	Job Title	Action Date	Referral Expires	Elig List Type	Eligible List Name	Status
Rawlings, Jerald	(888)555-5555	28121279		2019-00113	Fiscal Analyst 4		04/05/2020	Regular	Default List	e-Offer Pending
Applicant, Alex	360-555-9877	38869997		2019-00113	Fiscal Analyst 4		04/05/2020	Regular	Default List	e-Offer Accepted

e-Offer Pending

REQUISITION POSITION: Fiscal Analyst 4 (2019-00113)  
CANDIDATE: Jerald Rawlings  
OFFER SENT BY: Evan Oderman

Track Progress: Sent e-Offer (10/08/2019) Viewed Offer Letter Offer Response (Due 10/11/2019)

OFFER DETAILS: Offer Date: 10/08/2019

ATTACHMENTS: 10/8/2019 Dear Jerald, With great pleasure, I extend the following employment offer to you.

- An offer that is still pending or that was been rejected can be updated and re-sent to the candidate if necessary. Candidates are prompted to enter a reason when rejecting an offer. Updates made to e-Offers are tracked in the candidate history tab. You can also print or download the offer letter from this page.

The screenshot displays the 'e-Offer' management page for a rejected offer. At the top, the status is 'Rejected' in a red box. The offer details include: REQUISITION POSITION: Corrections and Custody Officer 1 (2016-00067); CANDIDATE: Alex Applicant; OFFER SENT BY: Evan Oderman. A 'Track Progress' timeline shows three steps: 'Sent e-Offer (10/08/2019)', 'Viewed Offer Letter (10/09/2019)', and 'Offer Rejected (10/09/2019)'. A red arrow points to the 'Offer Rejected' step, which has a 'View Reason' link. In the top right corner, there are 'Cancel' and 'Edit' buttons, with a red arrow pointing to the 'Edit' button. The 'OFFER DETAILS' section on the left lists: Offer Date: 10/08/2019; Due Date: 10/09/2019; Offer Amount: 99000 Annually. The main content area shows the offer letter text, including a greeting to Alex and details about the position and salary. An 'ATTACHMENTS' section is visible on the right.

The screenshot shows the 'Applicant, Alex' profile page. The top header includes 'Applicant, Alex' and 'Person ID: 38869997' with an 'e-Offer' tag. Navigation buttons for 'Prev' and 'Actions' are in the top right. A horizontal menu below the header includes 'Application', 'Questions', 'E-References', 'Notices', 'History', and 'Notes'. A red arrow points to the 'History' tab, which is currently selected. The main content area shows a notification from 'Evan Oderman' updated the e-Offer 'Today at 8:46 AM'. Below the notification, a table displays offer details: Due date: 10/18/2019; Offer Amount: 86000; Offer Date: 10/15/2019.



## Hire a Candidate

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

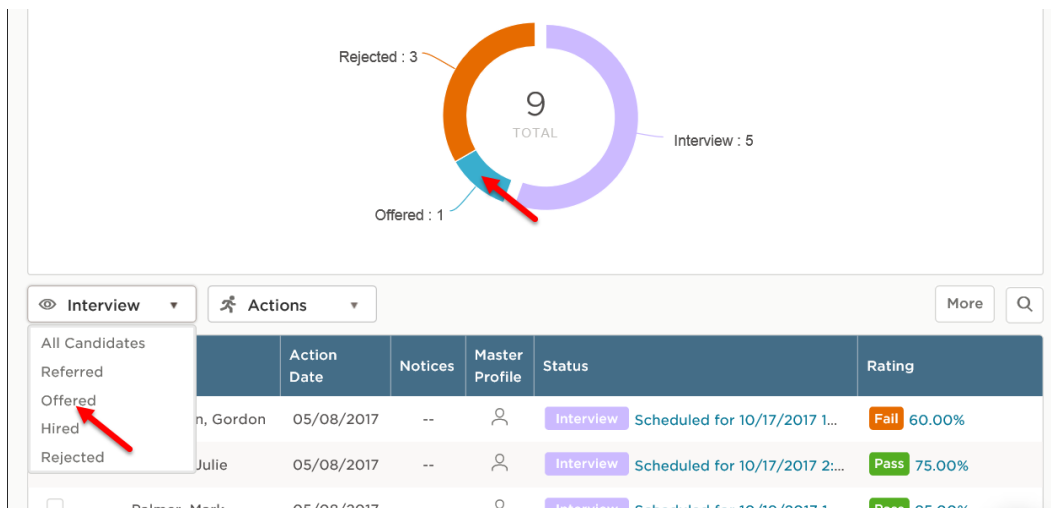
### Steps to Hire a Candidate

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

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

Showing 1 - 2 of 2 items

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

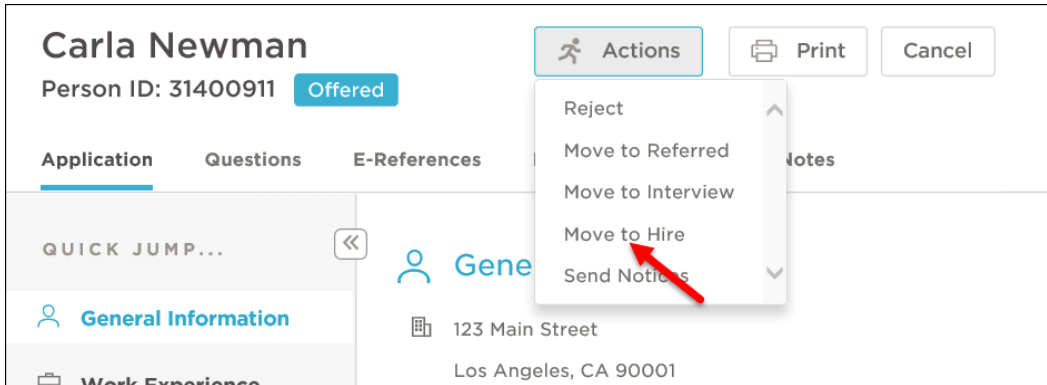


20. Click the name the candidate to hire.

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

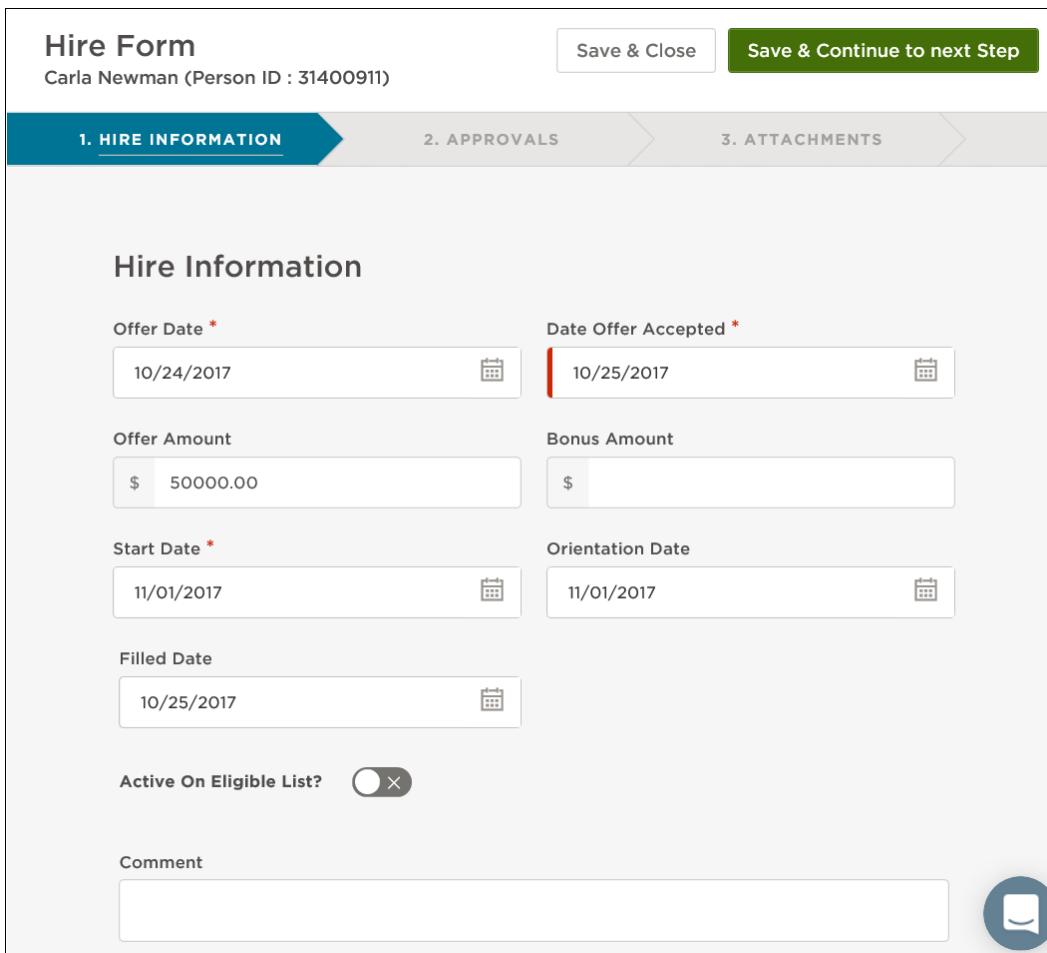
Showing 1 - 1 of 1 items

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



The screenshot shows the profile for Carla Newman (Person ID: 31400911) with a status of 'Offered'. The 'Actions' menu is open, listing options: Reject, Move to Referred, Move to Interview, Move to Hire, and Send Notifications. A red arrow points to 'Move to Hire'. Other visible elements include 'Print' and 'Cancel' buttons, and a 'Notes' tab.

22. Enter the start date and any additional details.



The screenshot shows 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 includes the following fields:


Field	Value
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?	<input type="checkbox"/>
Comment	


Buttons for 'Save & Close' and 'Save & Continue to next Step' are visible at the top right.

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


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




### Approval Workflow

 The approval workflow below has been automatically applied to this hire based on the Department/Division. You have the option to override the workflow for this hire


-  **Budget**




Approvers  
Nancy Reed , +1  
more

Status  
 Pending...


Due Date    Comments     
-  **HR**



Approvers  
Pamela  
Gavlinski , +1  
more


Status  
 Pending...


Due Date    Comments     
-  **County Admi...**

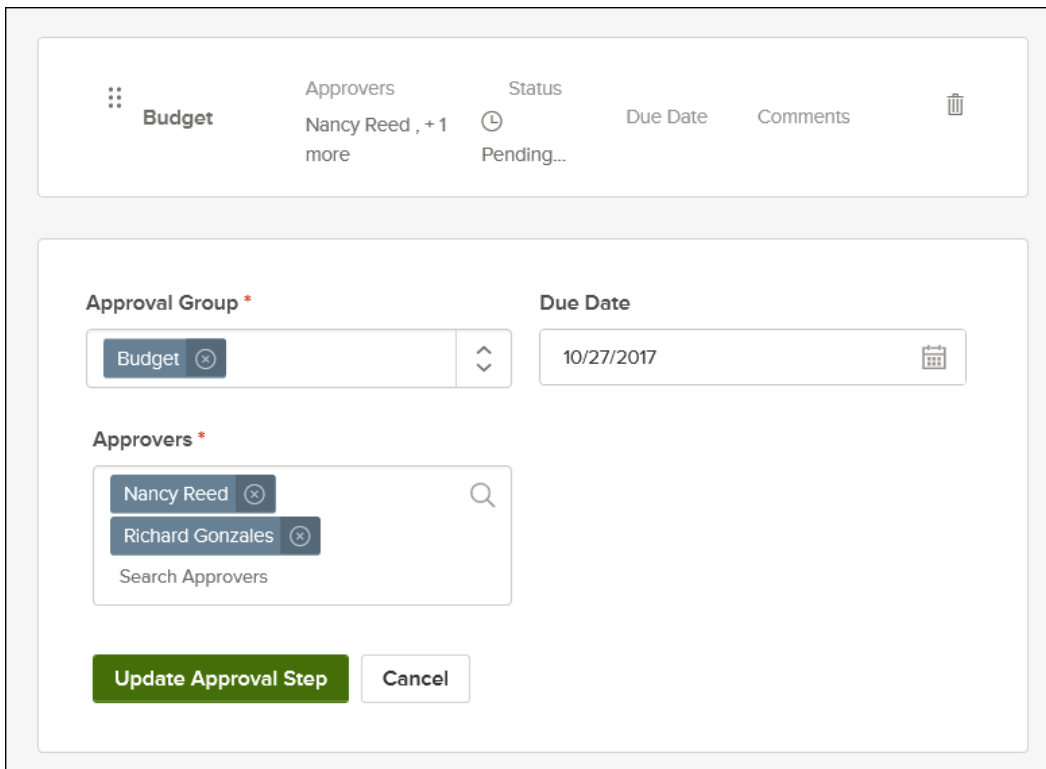
Approvers  
Drake Thomas ,  
+ 1 more

Status  
 Pending...

Due Date    Comments     

 [Add Approval Group](#)

25. 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.



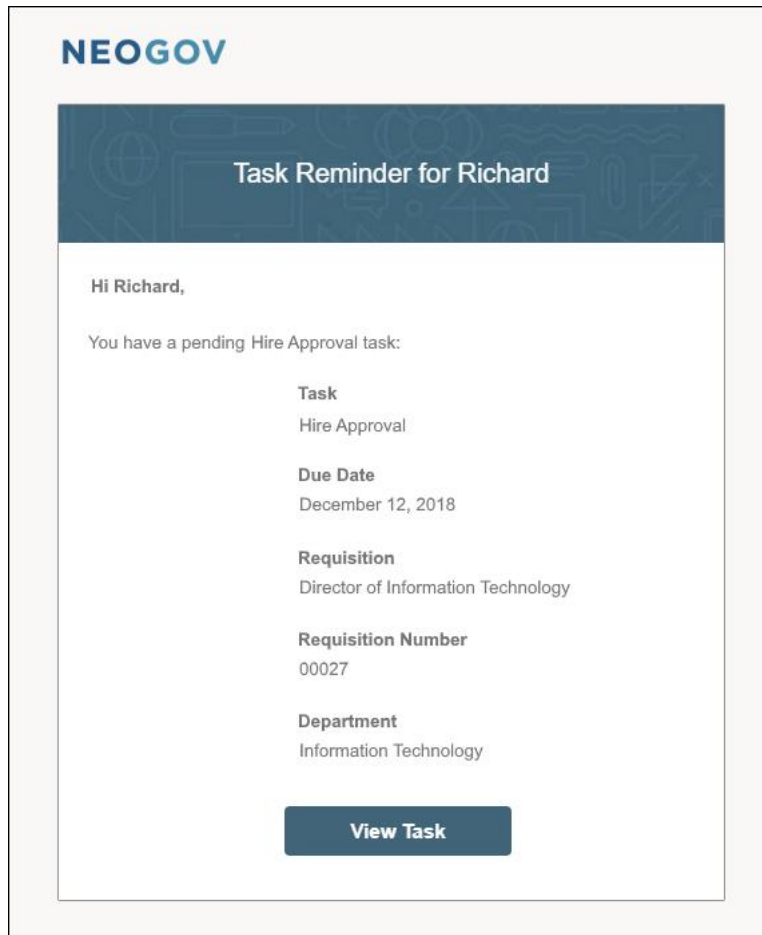
The screenshot shows a configuration window for an approval task. At the top, there is a table with columns: Budget, Approvers, Status, Due Date, and Comments. The 'Budget' column shows 'Budget'. The 'Approvers' column shows 'Nancy Reed , +1 more'. The 'Status' column shows a clock icon and 'Pending...'. The 'Due Date' column is empty. The 'Comments' column has a trash icon.

Below the table, there are two main sections:


- Approval Group \***: A dropdown menu showing 'Budget' with a close icon and a refresh icon.
- Due Date**: A date input field showing '10/27/2017' with a calendar icon.
- Approvers \***: A search box containing 'Nancy Reed' and 'Richard Gonzales', both with close icons. Below the search box is the text 'Search Approvers'.

At the bottom, there are two buttons: a green 'Update Approval Step' button and a white 'Cancel' button.

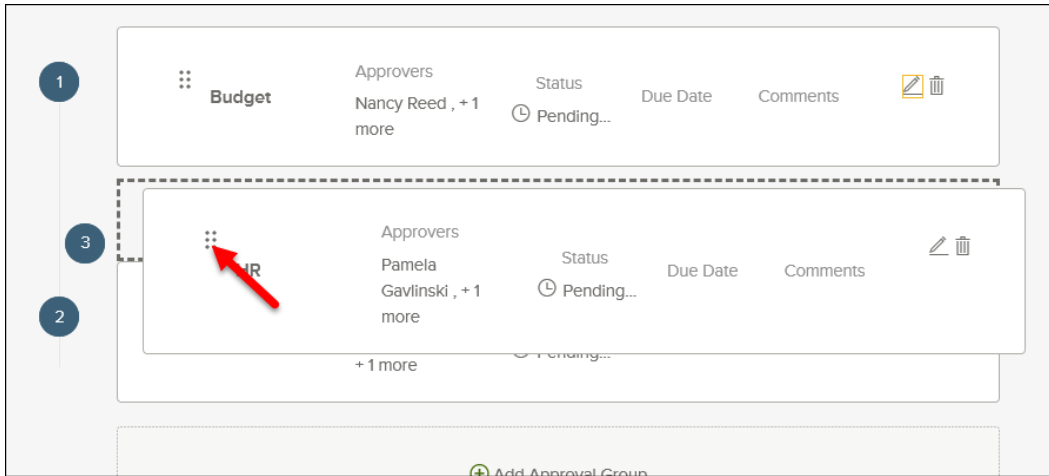
26. Repeat these steps for all remaining approval steps that require due dates. The assigned approver(s) will receive a reminder email from info@neogov.com, with the subject line, NEOGOV OHC Task Reminder, on the due day and each day the approval task is past due; until the task is completed. In the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



Note: Task reminder emails, such as the hire approval reminder, must be enabled by an Insight Administrator (Insight navigation: Admin > Agency Preferences > OHC section).

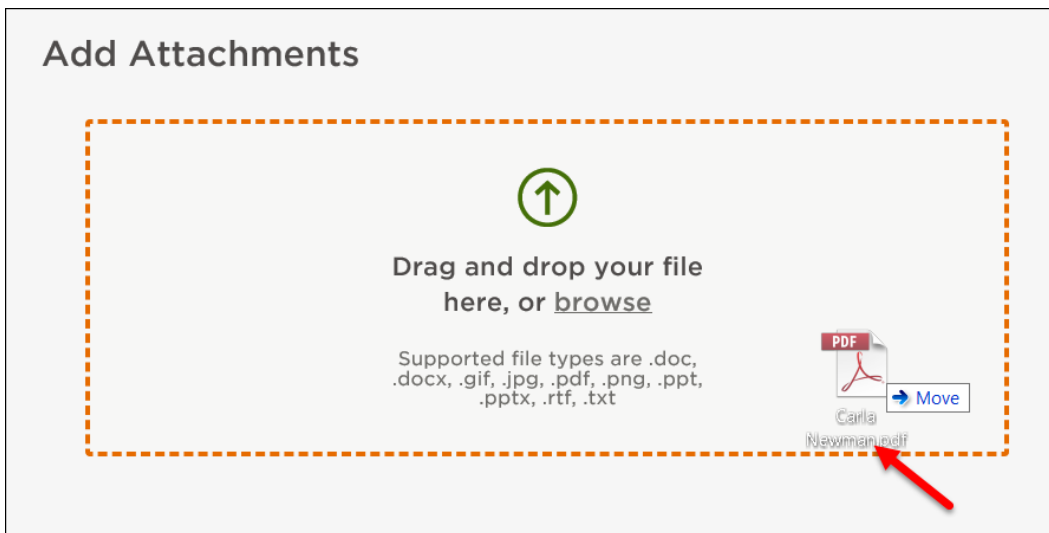
27. If a template for your department/division does not exist, you will be prompted to create an approval workflow. You have two options: (1) Create an approval workflow. (2) Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.
28. On the Approval Group pulldown, click the applicable approval group.
29. From the Approvers field, click , select the applicable approvers, and then click Done.
30. Click Add Approval Step.
31. Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.

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



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

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



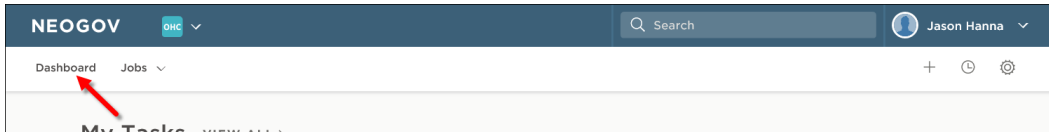
Note: If you're not quite ready to submit the hire, click Save & Close. The hire will display in your referred list with a pending release status. Once you're ready to submit, edit the hire, make any updates and click Save & Submit.

## Approve a Hire

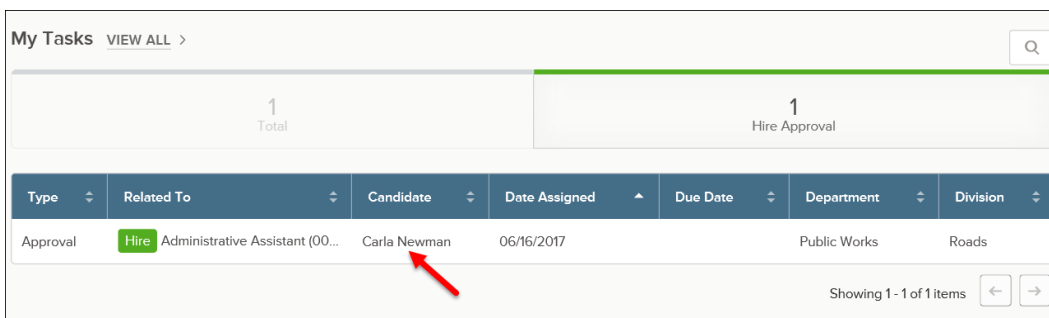
Required OHC role: With the OHC role of Approver, you can review a hire sent to you for approval.

### Steps to Approve a Hire

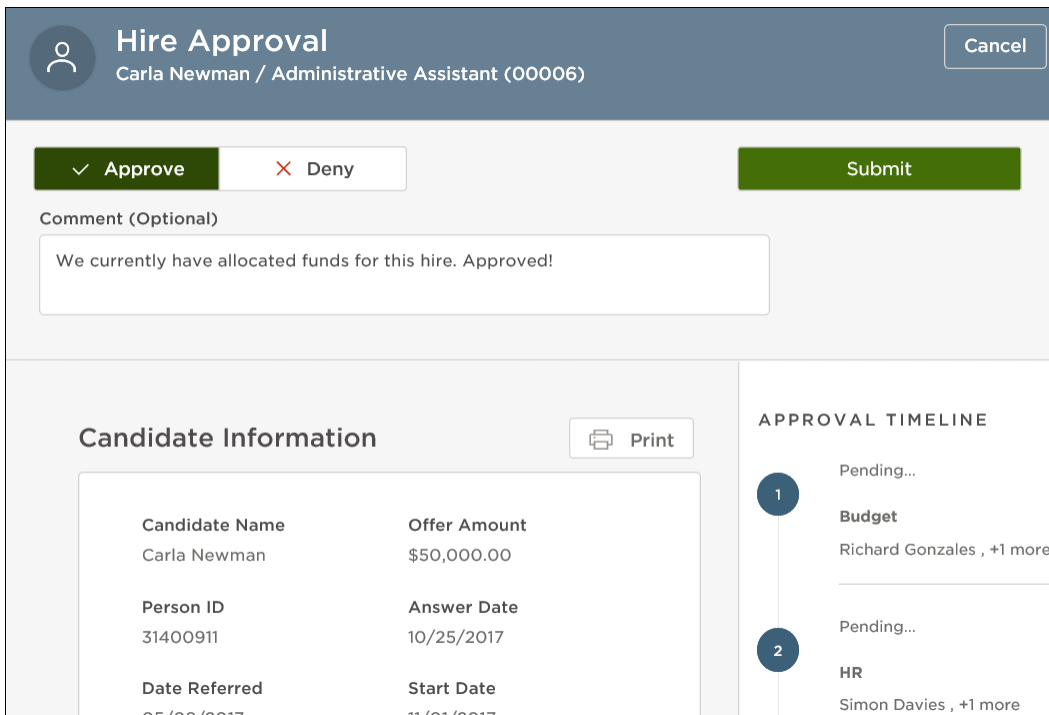
5. If you're not already viewing your dashboard page, click Dashboard from the upper left.



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



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



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

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

**Hire Approval**  
Carla Newman / Administrative Assistant (00006) Cancel

Send Back to Step: HiringManager -

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

**Candidate Information**

Candidate Name	Offer Amount
Carla Newman	\$50,000.00

**APPROVAL TIMELINE**

05/08/2017 by Richard Gonzales

**Budget**  
Richard Gonzales - 11,000.00

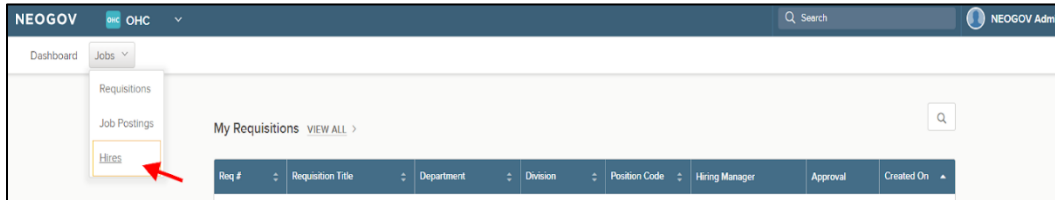


## View Hires

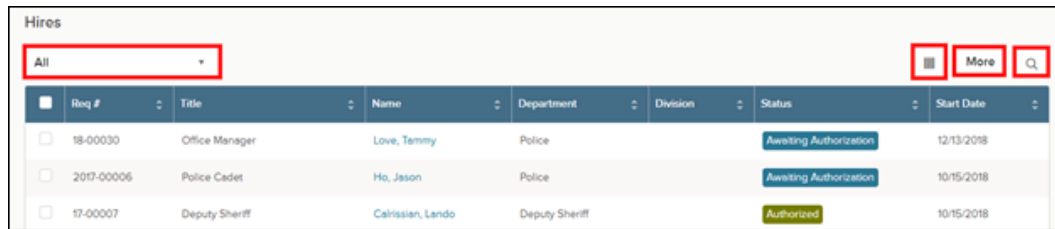
Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can view hires.

### Steps to View Hires



1. On the Jobs menu, click Hires.



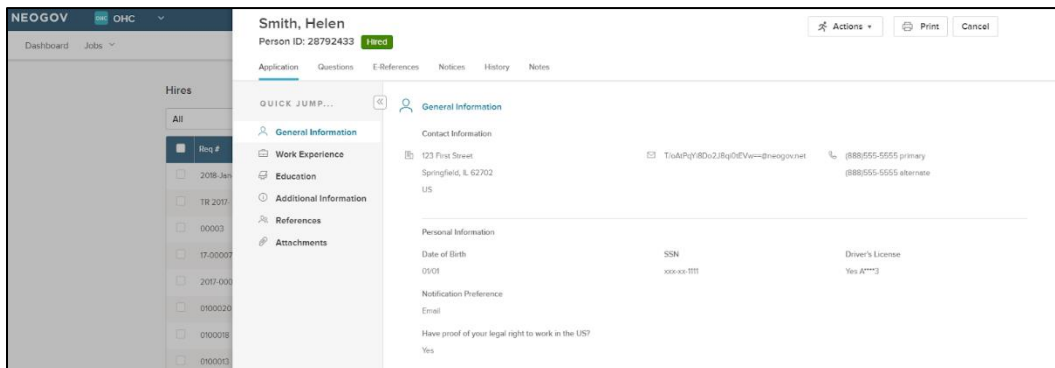
2. A listing of hires will display.



You have four available features:

- On the Candidates menu, click the status of hired candidates for which you want to view.
- Click  and select the columns for which you want to view.
- On the More menu, click Export to CSV.
- Click  to search by various data including: requisition number and title, candidate's name, department, division and candidate's date.

3. Click the candidate's name to view their application.



4. Click the hired candidate's status to view the Hire Details page.

Hires							
All							
	Req #	Title	Name	Department	Division	Status	Start Date
<input type="checkbox"/>	2018-Jan-A	Administration	Smith, Helen	Administration		Authorized	04/27/2018
<input type="checkbox"/>	TR 2017- HRA	Administration	Woodhull, Abraham	Administration		Authorized	03/22/2018
<input type="checkbox"/>	00003	Sales Internship	C, Catherine	Police		Authorized	03/02/2018

NEOGOV OHC

Dashboard Jobs

Hires

All

Req #

2018-Jan

TR 2017

00003

17-00007

2017-000

050020

090008

090003

<< >>

### Hire Details

Helen Smith (Person ID : 28792433)

X Cancel Print

Hire Information Approvals History

Hire Information

Position Details Administration (23)	Date Referred 03/23/2018	Offer Date 04/27/2018
Offer Accepted Date 04/27/2018	Start Date 04/27/2018	Orientation Date N/A
Offer Amount N/A	Bonus Amount N/A	Filed Date 04/25/2018
Active On Eligible List No		
Comments N/A		

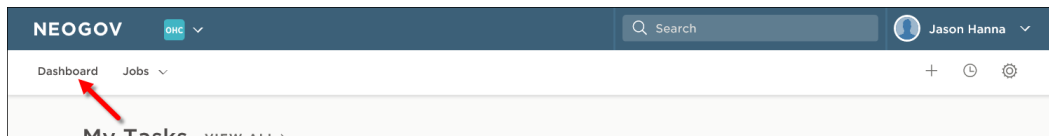
Attachments

## Print Applications

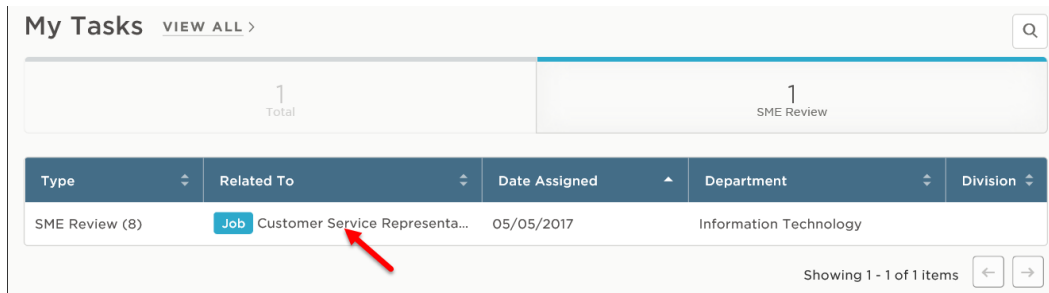
Required OHC role: With the OHC role of SME, Rater, Hiring Manager, or HR Liaison, you can print applications.

### Steps to Print Applications

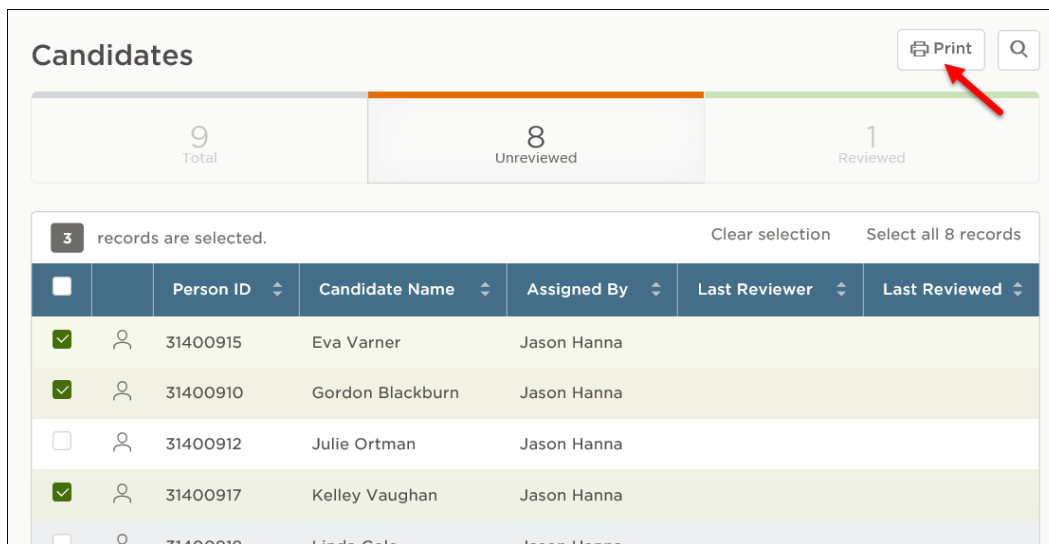
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



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



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



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

**My Candidates**

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

Showing 1 - 2 of 2 items

- Select the candidates for which you need printed applications.
- On the Actions menu, click Print Apps.

Referred

5 records are selected

Actions

- Reject
- Move to Skype Interview
- Move to On-Site Interview
- Move to Offered
- Move to Hire
- Send Notices
- Print Apps

	Action Date	Notices	Master Profile	Status
<input checked="" type="checkbox"/>	05/08/2017	--		Referred Active
<input checked="" type="checkbox"/>	05/08/2017	--		Referred Active
<input checked="" type="checkbox"/>	05/08/2017	--		Referred Active

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

Select your preferred printing option and click Continue.

Referred

Print Apps

5 records are selected.

	Name	Action Date
<input checked="" type="checkbox"/>	Blackburn, Gordon	05/08/2017
<input checked="" type="checkbox"/>	Cole, Linda	05/08/2017
<input checked="" type="checkbox"/>	Newman, Carla	05/08/2017
<input checked="" type="checkbox"/>	Ortman, Julie	05/08/2017
<input checked="" type="checkbox"/>	Palmer, Mark	05/08/2017
<input type="checkbox"/>	Stern, Phillip	05/08/2017
<input type="checkbox"/>	Vарner, Eva	05/08/2017
<input type="checkbox"/>	Vaughan, Kelley	05/08/2017

**Print Applications** Cancel Continue

You've selected 5 applications to print.

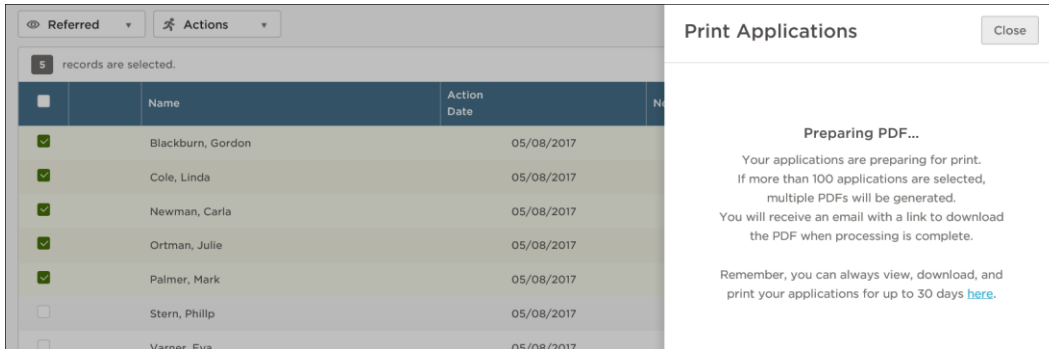
**Print Options**

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

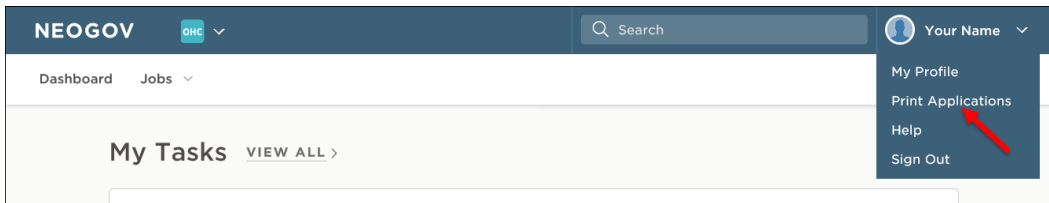
Create PDF with Applications  
A PDF will be generated and you will be notified via email when it is ready to download.

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.

