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Insight Enterprise

Online Hiring Center Guide

State of North Carolina
January 2012

State of North Carolina User Guide Content

The purpose of this Online Hiring Center User Guide is to show departments how to use E-Recruit to automate, record and communicate decisions resulting in streamlined hiring processes. The guide is divided into sections that align with tasks done by the role descriptions shown on the next page. Based on your role, only one or two sections may pertain to your work. Although not always needed, ***tips*** located within each section provide additional information and often answer commonly occurring questions.

To get started- Go to: **https://secure.training.neogov.com** for training site OR **https://secure.neogov.com** for live production site.

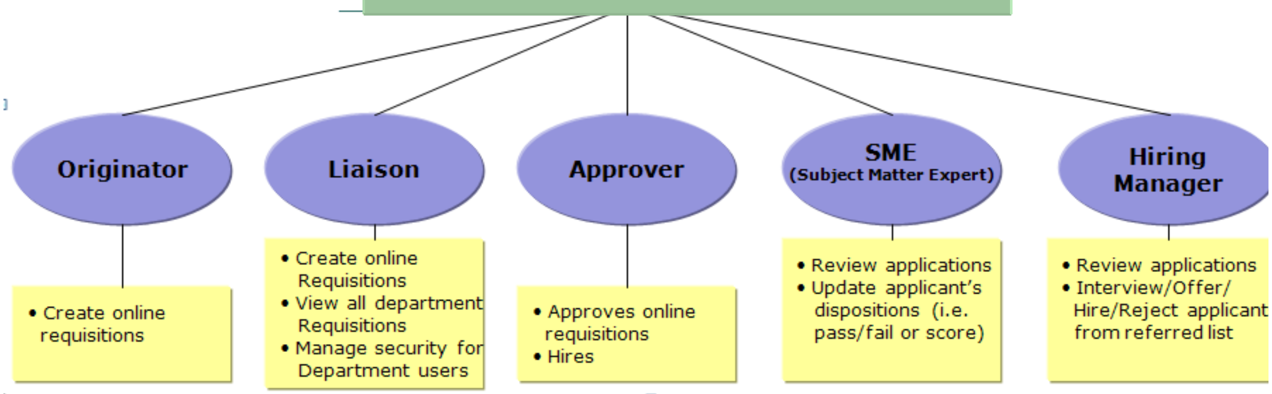
Once signed in, you may go to the "Help & Support" Section in the top navy blue section of the main screen for video tutorials provided by the vendor, NEOGOV.

User Guide Sections:

Insight – Online Hiring Center (OHC) Roles

Training: https://secure.training.neogov.com

Production: https://secure.neogov.com



1. Create and Release a Requisition

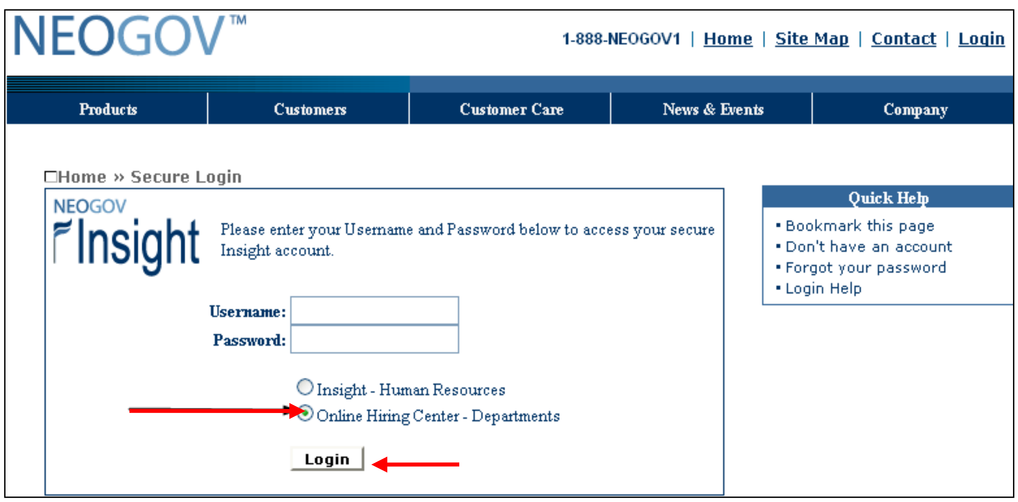
Create a Requisition (As a Department Liaison, an Originator or Hiring Manager with access to originate requisitions)

***Tip*: a requisition is also known as a request for recruitment**

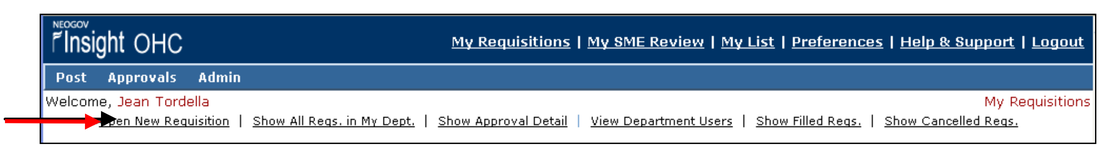
1. Go to: https://secure.training.neogov.com **for the training site or to** **https://secure.neogov.com for the live production site**
2. Click on the 'Login' link in the upper-right-hand corner
3. Enter your Department Username and Password (write it to the right for future reference):

***Tip*: Use of your work e-mail as your Department User name is the standard convention in this E-Recruit system - makes it easy to remember**

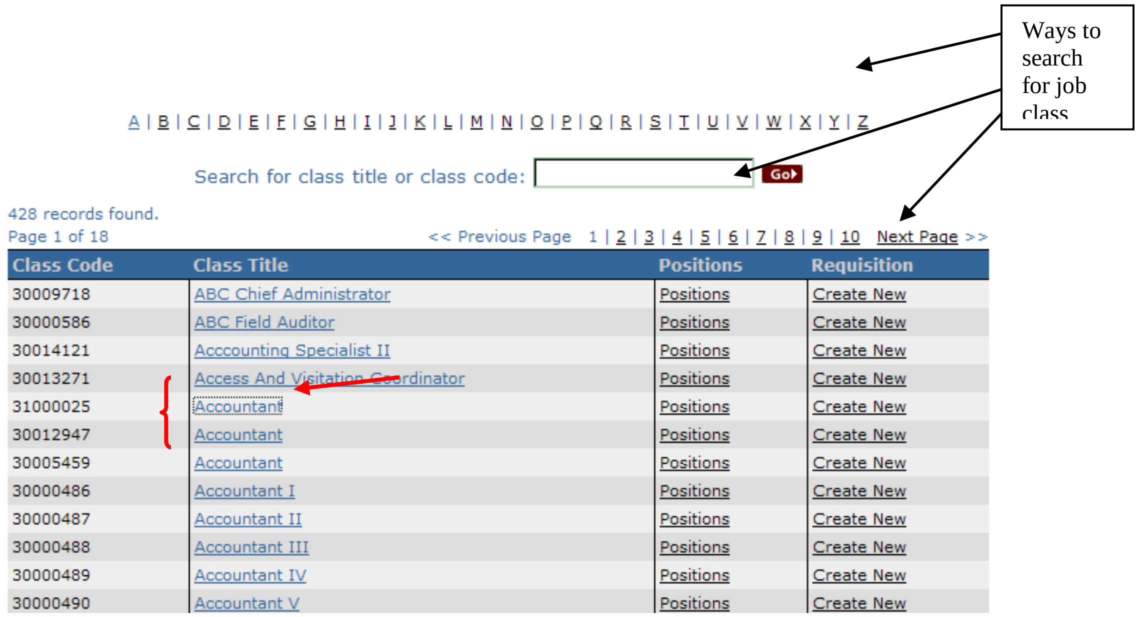
4. Select the **'Online Hiring Center - Departments'** radio button, click login (this will take you to the OHC, which is where all non-HR department users will log in)



5. Click on 'Open New Requisition'



6. Search for a class specification from which to create the requisition. You may search by alphabet, by scrolling through pages or by entering a title in the search box and pressing "go". See arrows in screen diagram that follows:

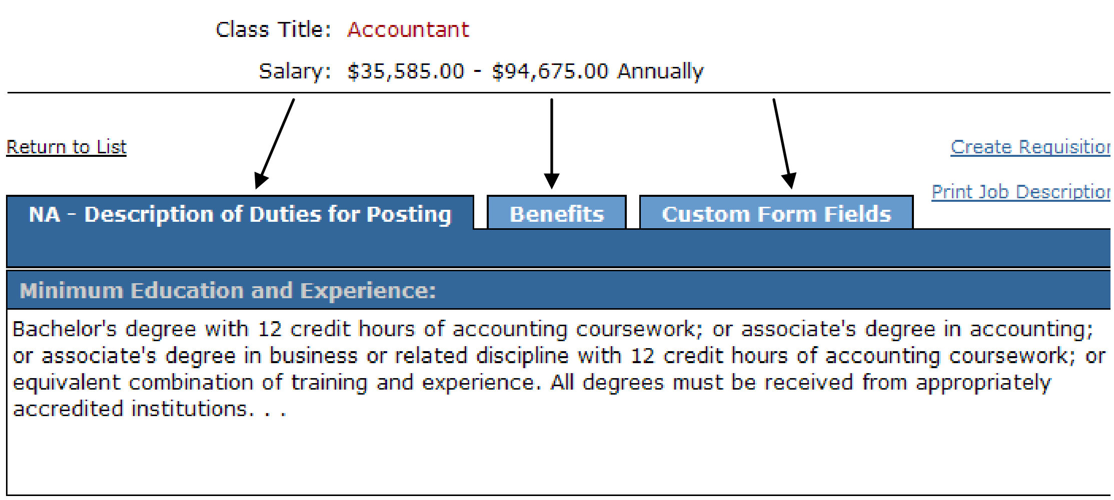


Class Code	Class Title	Positions	Requisition
30009718	ABC Chief Administrator	Positions	Create New
30000586	ABC Field Auditor	Positions	Create New
30014121	Acccounting Specialist II	Positions	Create New
30013271	Access And Visitation Coordinator	Positions	Create New
31000025	Accountant	Positions	Create New
30012947	Accountant	Positions	Create New
30005459	Accountant	Positions	Create New
30000486	Accountant I	Positions	Create New
30000487	Accountant II	Positions	Create New
30000488	Accountant III	Positions	Create New
30000489	Accountant IV	Positions	Create New
30000490	Accountant V	Positions	Create New

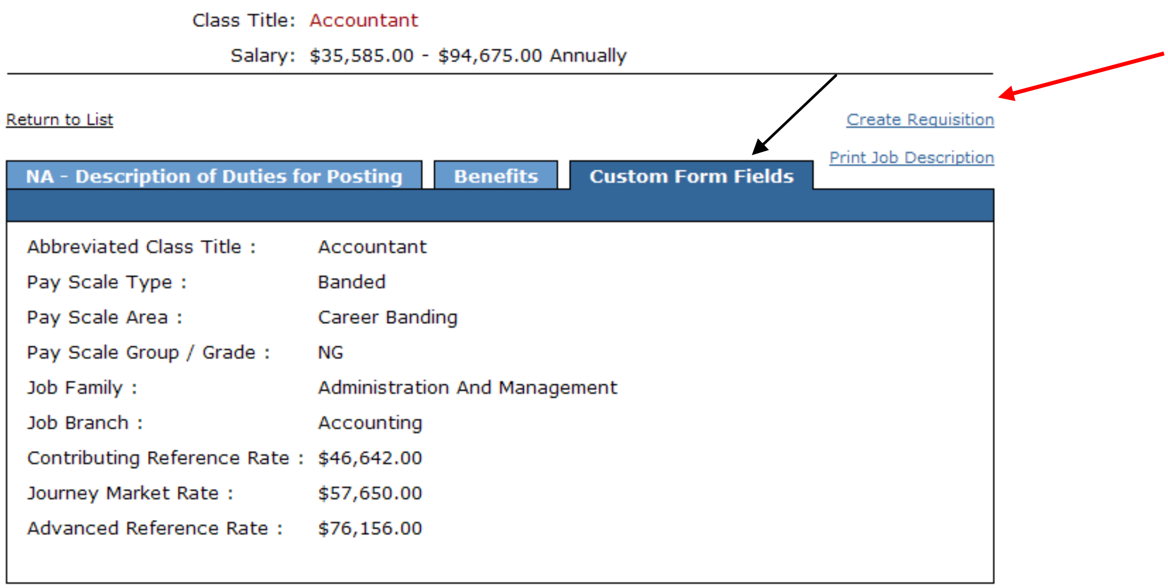
***Tip*: Because graded, banded, flat-rate and judicial system classes are loaded into E-Recruit, some job class titles are listed more than once. When the same job class name shows more than once, the requisition creator will want to click on the class name and review the "Custom Form Field" tab to confirm the selected class matches the intended class unless they are certain they know the job class number.**

In the screen diagram above, the class code for the title "Accountant" shows 3 times (see bracket). The example below shows how to locate the class code corresponding with your intended one when a class title appears more than once. To find the intended class, click on the <u>Accountant</u> class title (the example shows what happens when the first "Accountant" title listed (3100025, corresponding to the arrow in inset) is selected.

Three tabs, (Description…, Benefits, and Custom Form Fields) appear, as shown below:



***Tip*: By clicking on the "Custom Form Field" (see visual immediately below), details appear; these details will help the requisition creator decide if this class is the intended one. In the example shown, this particular Accountant job class is part of the career banded system.**



Requisitions can be created from the detail screen, as shown above, or the main screen, as shown below.

Tip: If the class you are viewing details for is not the intended one, you may use the  **navigational back arrow key (back white arrow in round blue circle) at the top left of your screen to "back up" to the full list of job classes. Or, click on the "Return to List" link at the top left-hand side of the screen.**

7. Click on 'Create New' in the Requisition column (all the way to the right-hand side) –unless you already did so from a detail screen as shown above

Class Code	Class Title	Positions	Requisition
5239	Accountant	Positions	Create New
1181	ADMINISTRATIVE SPECIALIST	Positions	Create New

8. Fill in the requisition form:

a. **Desired Start Date** – Specify today's date

b. **Requisition #** - *This # is automatically assigned by the system..*

c. **Working Title** – Enter a 'working title' to be used for posting, especially if different from the class title. If the class title and working title are the same, you may enter the class title now or it can be entered later.

d. **Vacancies** – Enter the # 1 to specify the vacancy (to be filled) for the position.

***Tip:* With initial go-live NC will use a 1:1 relationship between a requisition (request to post) and a given posting.**

e. **Department** – From the dropdown list, select the name of your Department (the department for which the Requisition is needed).

f. **Division** – Optional field. From the dropdown list, select the name of your Division (if any).

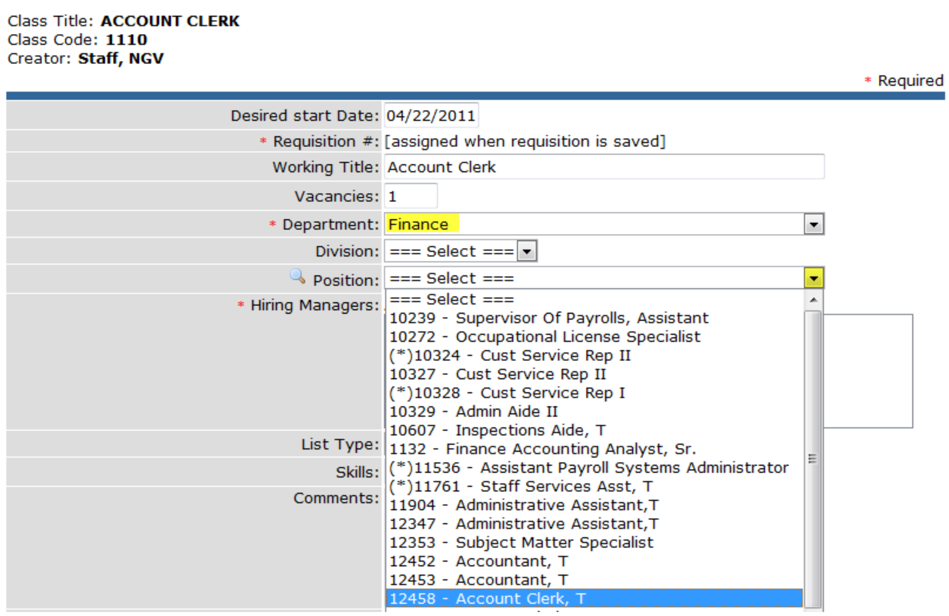
g. **Position**: There are two ways to select a position ID for the requisition being created:

   i. By selecting a department and division (if any) from the drop-down list, or

   ii. Using the search selector to find the exact position desired

Selecting a position ID by selecting a Department/Division (i):

- This Position Number dropdown list will be populated once the user enters a Department and an optional Division. ***Only departments and divisions the department user has access to will appear in the drop-down***.
- The Position Number dropdown list will only include 'active' positions within the selected Department/Division. The list will not be filtered by job classification.



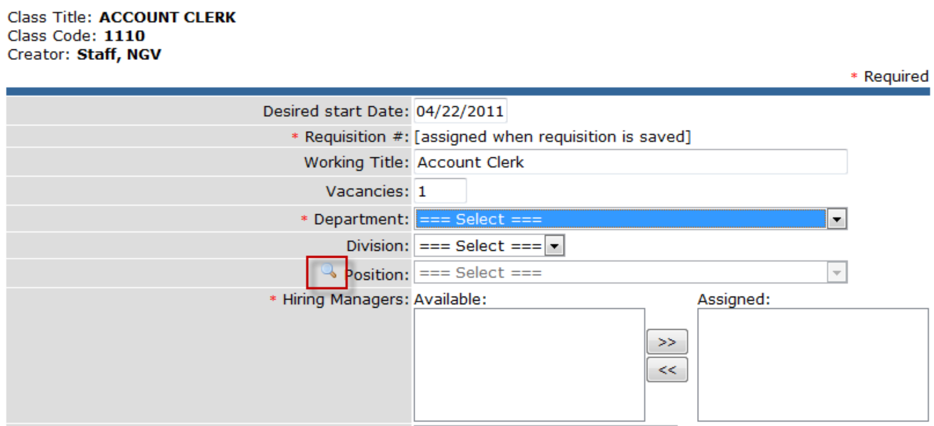
Selecting a position ID via 'Search' Selection (ii): (if needed)

***Tip*: When you do not know the position number, you may search for positions using a method shown. If your agency's position numbers are controlled by**

BEACON, you might find "contains" more useful than "begins with", since all BEACON positions begin with 600.

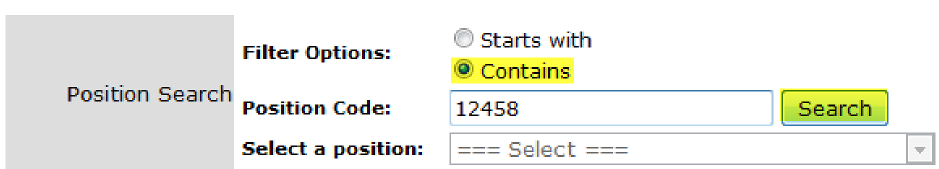
When performing a search the list will be populated with the applicable results. Upon clicking a position number generated from search results, the Department/Division boxes will automatically populate (with the department and division related to that position number).

- To search: Click on magnifying glass:



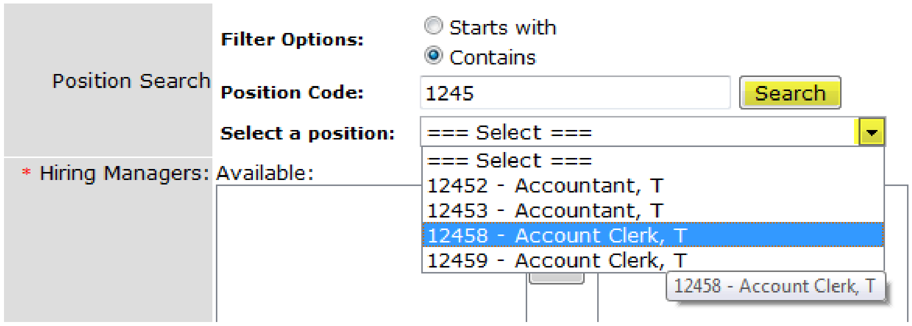
- Search box pops-up. User can search "Starts with" filter, or "Contains" filter.
    - Starts with filter – This filter returns all position numbers that start with the numbers entered by the user. EXAMPLE: User enters "123". All position numbers starting with "123" will be returned.
    - Contains filter – This is the default search type (auto-selected on search box load). This will return all position numbers with the numbers the user placed in the search box. EXAMPLE: User enters "123". All position numbers with "123" will be returned.

- Enter 'Search' criteria for position code, and click on "Search"

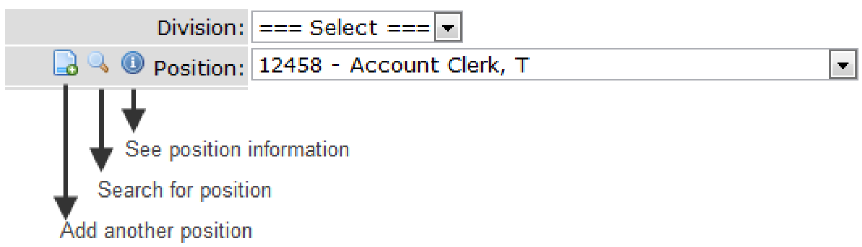


- Search box closes on-click (clicking the "GO" button) and the position control drop-down is populated with the values contained in the result-set.

- Click on ‘Select a Position’ Drop-down list, and select the desired position from the returned search results.



- Once a position is selected, the following options are available:



***Tip*- If you need to submit a requisition for an <u>anticipated</u> vacancy, ask the appropriate person in your agency to go to PO 13 in BEACON and select Info type 1007 to set the position in BEACON to “open”. This will populate in E-Recruit within a day, without interfering with BEACON reports.**

Continue with:

h. **Hiring Managers** – From the list of names in the ‘available’ box, select the ‘Hiring Manager’ (person responsible for completing the hire, who will receive final list of candidates from which to select), and move to the ‘assigned’ box.
Note – *more than one hiring manager can be ‘assigned’. All individuals ‘assigned’ will simultaneously receive the final list of candidates from which to select, and make the hiring decision.*

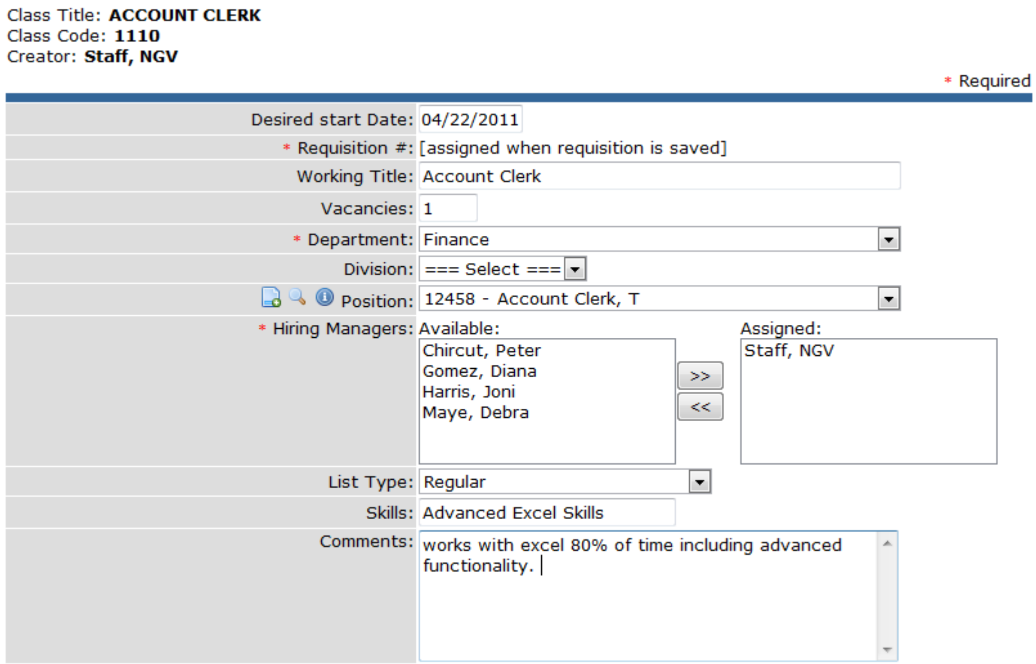
i. **List Type** – NC users will select the “regular” list type.

j. **Skills -** Optional field. Enter any desired ‘skills’ or other desired characteristics for desired candidates that is not listed in the Class Specification, or usually part of selection process.

k. **Comments** - Optional field. Field used to expand upon ‘skills’ field, or add additional comments about the requisition, recruitment process, etc.

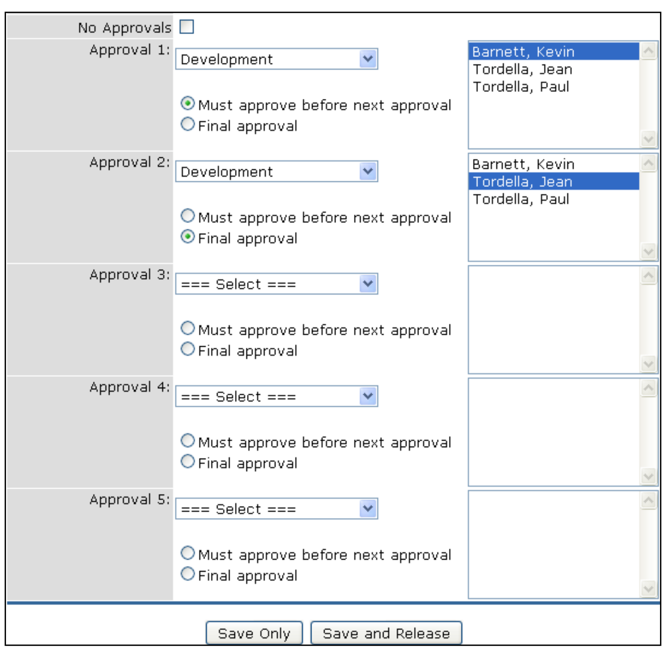
***Tip*- information supplied by the requisition’s creator in skills & comments sections might be useful to later reviewers. Creators may want to consider skills and comments sections as**

"electronic post-its" to communicate any special thoughts or needs pertaining to the recruitment that the requisition will launch.



9. Complete/define the approval chain or 'No Approvals' check box if none is required.

(see below and next page for details and tips)



Tips: **Based on individual agency practice, the creator of the requisition may or may not know the approval chain of command. Agency HR should be able to provide direction regarding the approval chain.**

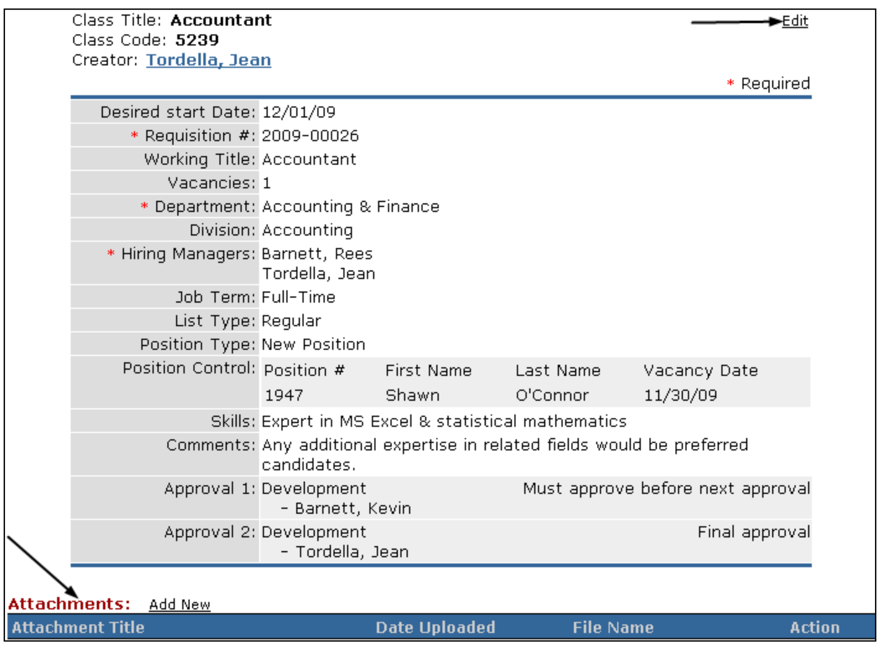
If more than one approver is selected at a given level (example: if Jon Doe and Jane Smith are selected for level 1 approval, then when <u>either</u> Jon or Jane approves and releases the action it is released and an e-mail is sent to the next level approver.) When several levels of approval are needed (e.g. 1, 2, 3), then the levels and e-mail notices occur in sequence.

If the requisition creator selects "no approvals" the requisition and an e-mail goes to HR once "save and release" is selected. Choosing the "save" option merely saves the requisition in progress for the creator but does not release it to or notify anyone else.

HR is not listed as an approver, because once all approvers "approve and release" the requisition, it goes automatically to HR.

10. Click on 'Save and Release' when you are ready for the requisition to go forward.

11. Finalize the content – Add attachments (only if necessary)



Class Title: **Accountant**
Class Code: **5239**
Creator: Tordella, Jean

Edit

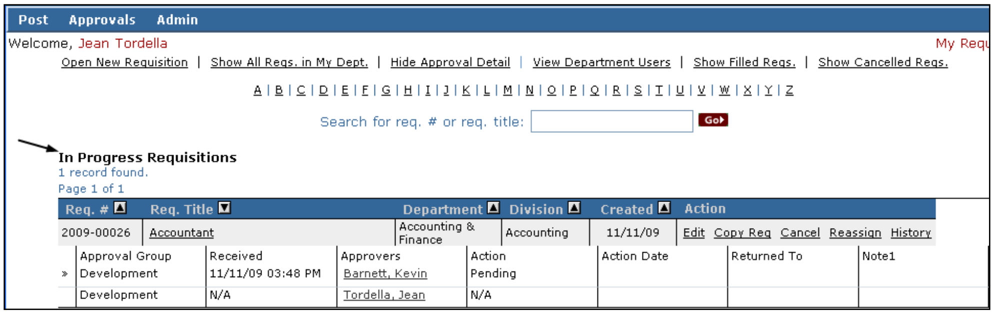
* Required

Desired start Date:	12/01/09
* Requisition #:	2009-00026
Working Title:	Accountant
Vacancies:	1
* Department:	Accounting & Finance
Division:	Accounting
* Hiring Managers:	Barnett, Rees Tordella, Jean
Job Term:	Full-Time
List Type:	Regular
Position Type:	New Position
Position Control:	Position # / First Name / Last Name / Vacancy Date 1947 / Shawn / O'Connor / 11/30/09
Skills:	Expert in MS Excel & statistical mathematics
Comments:	Any additional expertise in related fields would be preferred candidates.
Approval 1:	Development - Barnett, Kevin — Must approve before next approval
Approval 2:	Development - Tordella, Jean — Final approval

Attachments: Add New

Attachment Title	Date Uploaded	File Name	Action

12. View Requisitions in progress details, if you wish. Log out when done.


Post Approvals Admin
Welcome, Jean Tordella
My Requ
Open New Requisition | Show All Reqs. in My Dept. | Hide Approval Detail | View Department Users | Show Filled Reqs. | Show Cancelled Reqs.
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z
Search for req. # or req. title:
Go
In Progress Requisitions
1 record found.
Page 1 of 1
Req. # Req. Title Department Division Created Action
2009-00026 Accountant Accounting & Finance Accounting 11/11/09 Edit Copy Req Cancel Reassign History
Approval Group Received Approvers Action Action Date Returned To Note1
Development 11/11/09 03:48 PM Barnett, Kevin Pending
Development N/A Tordella, Jean N/A

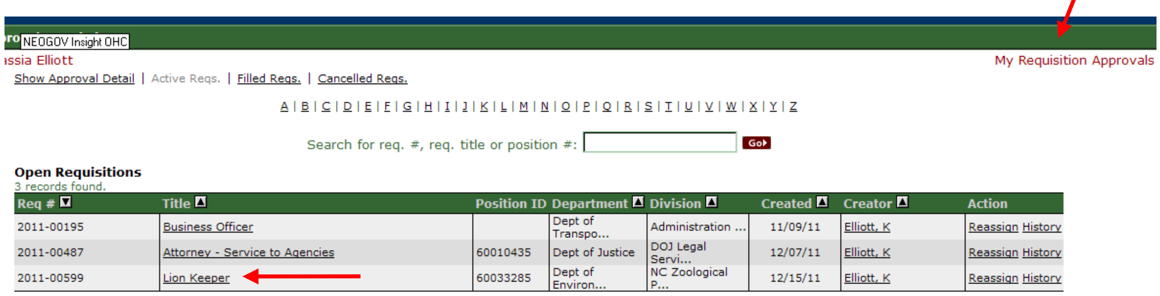
2. Approve a Requisition

Approve a Requisition (Approver role)

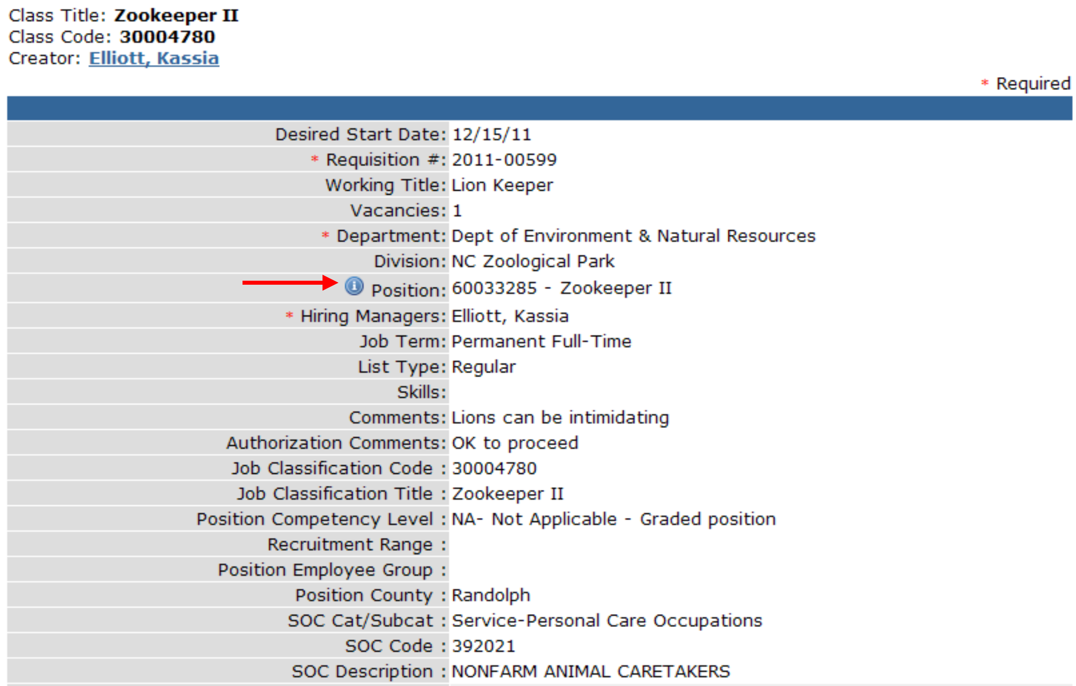
1. Go to: https://secure.training.neogov.com **for the training site or to** **https://secure.neogov.com for the live production site**
2. Click on the ‘Login’ link in the upper-right-hand corner
3. Enter your Department Username and Password (write it to the right for future reference):
4. Select the **‘Online Hiring Center - Departments’** radio button, click login (this will take you to the OHC, which is where all non-HR department users will log in)
5. View requisitions in your queue - go to approvals, then requisitions

Upper right in red shows where you are

This leads to a screen showing the requisitions awaiting your approval



6. To view a requisition’s details, click on its title to see details. (details example below)



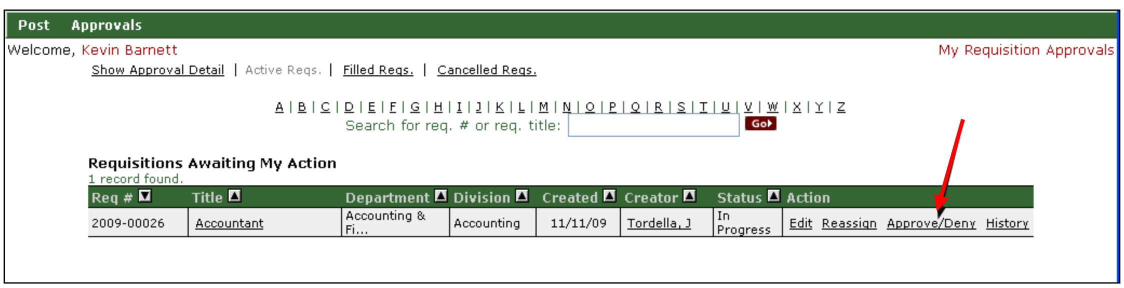
Class Title: **Zookeeper II**
Class Code: **30004780**
Creator: Elliott, Kassia

* Required

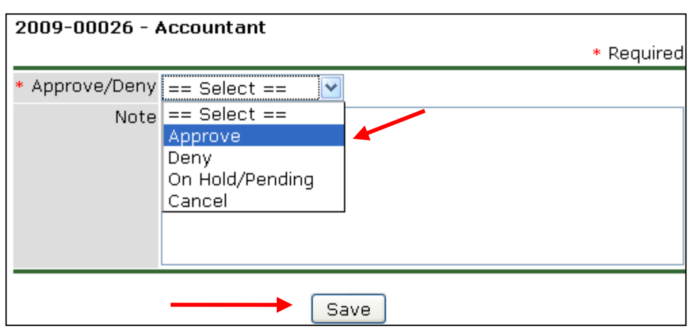
Desired Start Date:	12/15/11
* Requisition #:	2011-00599
Working Title:	Lion Keeper
Vacancies:	1
* Department:	Dept of Environment & Natural Resources
Division:	NC Zoological Park
Position:	60033285 - Zookeeper II
* Hiring Managers:	Elliott, Kassia
Job Term:	Permanent Full-Time
List Type:	Regular
Skills:	
Comments:	Lions can be intimidating
Authorization Comments:	OK to proceed
Job Classification Code :	30004780
Job Classification Title :	Zookeeper II
Position Competency Level :	NA- Not Applicable - Graded position
Recruitment Range :	
Position Employee Group :	
Position County :	Randolph
SOC Cat/Subcat :	Service-Personal Care Occupations
SOC Code :	392021
SOC Description :	NONFARM ANIMAL CARETAKERS

***Tip*: Clicking on the small next to the position number provides additional position information. From the detail screen, return to approvals via the back arrow navigation button at the top of your screen or go to 'Approvals', then 'Requisitions', as shown in item 5.**

6. Approve requisitions-go to the action column and click on the Approve/Deny link.



7. Define the status, from the pull down choices, then click on 'Save'

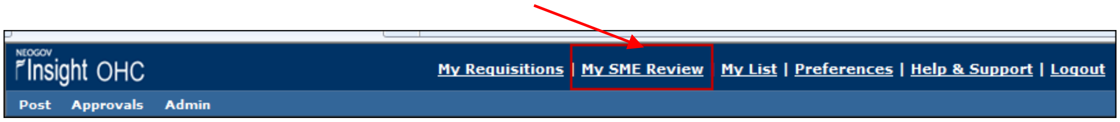


3. Subject Matter Expert

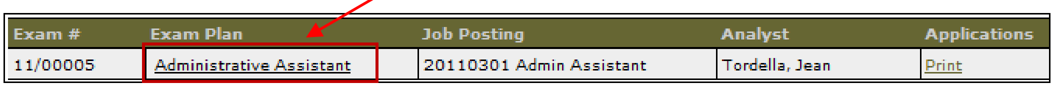
Review Applicants as Subject Matter Expert (SME)

Tip: **if asked to be an SME, you will receive an e-mail notifying you that applications await your review.**

1. Go to: https://secure.training.neogov.com **for the training site or to** **https://secure.neogov.com** **for the live production site**
2. Click on the 'Login' link in the upper-right-hand corner
3. Login using your Department Username and Password
4. Click on the 'My SME Review' link

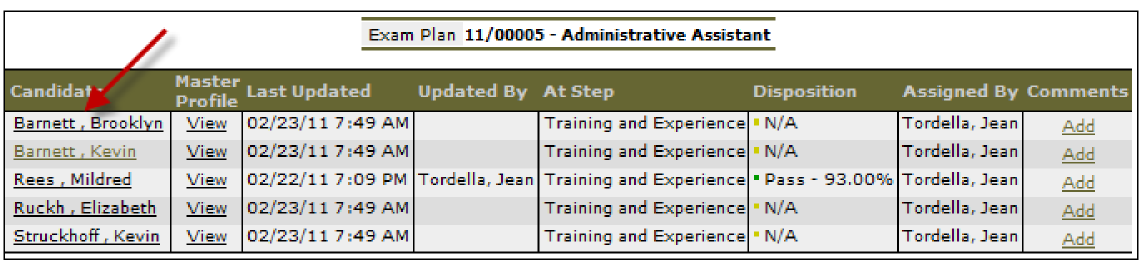


5. Click the job title of your Exam (Recruiting) plan to view the applicant list.



Exam #	Exam Plan	Job Posting	Analyst	Applications
11/00005	Administrative Assistant	20110301 Admin Assistant	Tordella, Jean	Print

6. Click the candidate's name to view their application record



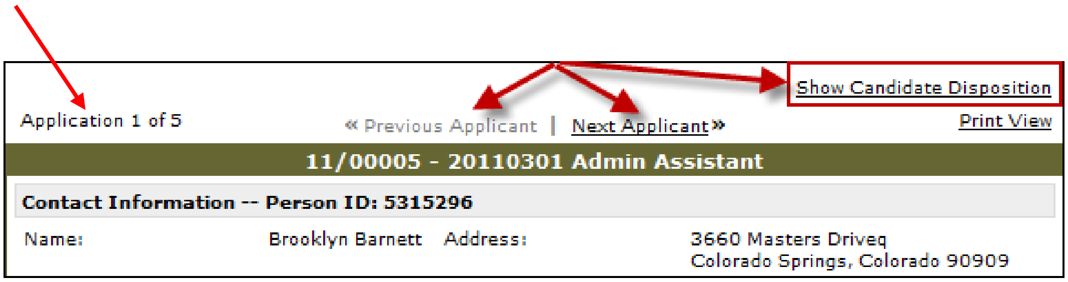
Exam Plan **11/00005 - Administrative Assistant**

Candidate	Master Profile	Last Updated	Updated By	At Step	Disposition	Assigned By	Comments
Barnett , Brooklyn	View	02/23/11 7:49 AM		Training and Experience	N/A	Tordella, Jean	Add
Barnett , Kevin	View	02/23/11 7:49 AM		Training and Experience	N/A	Tordella, Jean	Add
Rees , Mildred	View	02/22/11 7:09 PM	Tordella, Jean	Training and Experience	Pass - 93.00%	Tordella, Jean	Add
Ruckh , Elizabeth	View	02/23/11 7:49 AM		Training and Experience	N/A	Tordella, Jean	Add
Struckhoff , Kevin	View	02/23/11 7:49 AM		Training and Experience	N/A	Tordella, Jean	Add

Tips: **As an SME, you *may* want to review applications, one after another, to formulate ideas about *relative* competiveness of content before you begin to make decisions (dispositions) about whether or not to move applications forward for further consideration.**

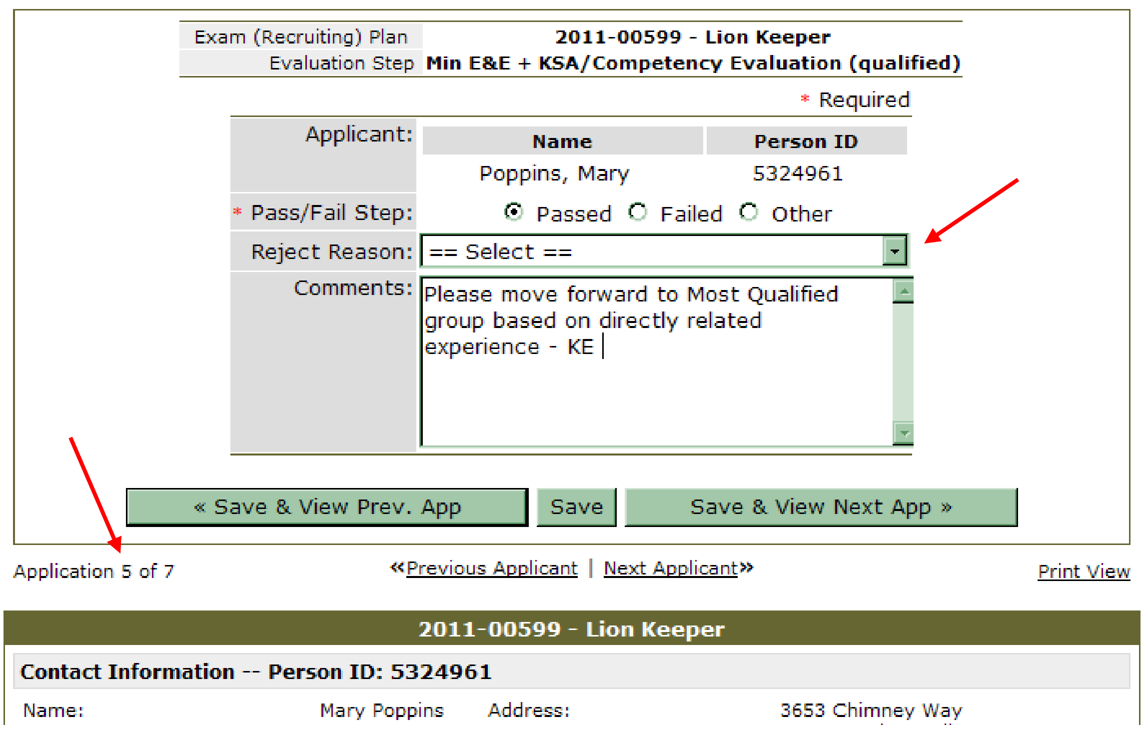
When you are ready to make decisions, click on 'Show Candidate Disposition' on the top right of the page of an application (see below)

This process will show you which application # of how many applications you have, as indicated by the left arrow below:



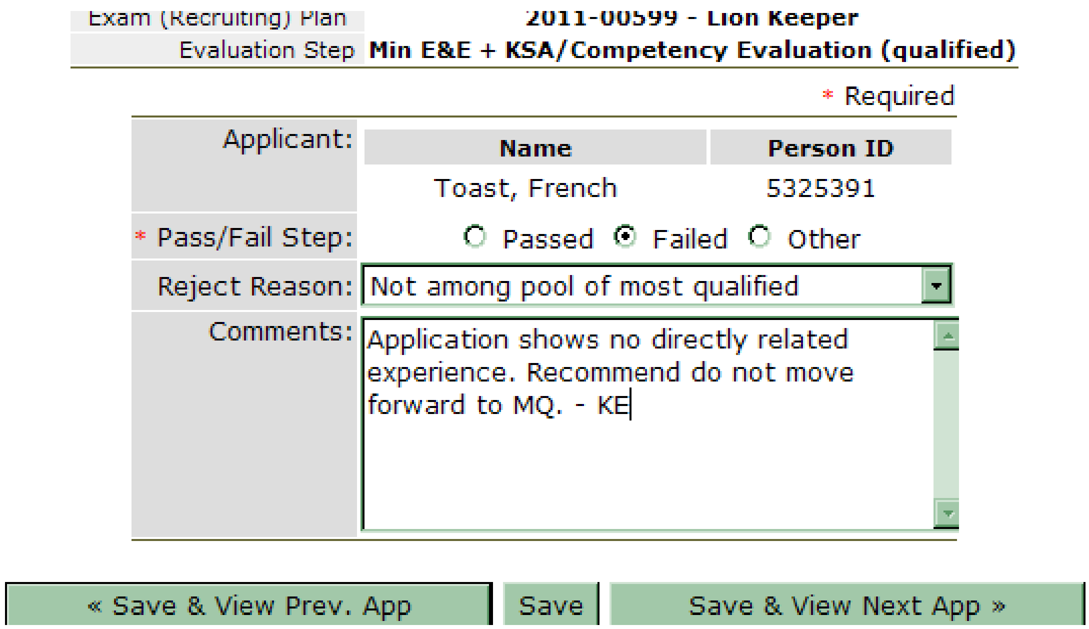
7. Enter the candidate's move forward (pass) or hold back (fail) status.

Tip: **If your disposition is "passed" leave "==Select==" as shown in the Reject Reason box; make relevant comments in the "comments" box provided**



Tips: **when you hold back (fail) an application, you must select a reason from the pull down menu. Best practice and communication protocols ask that you also enter a comment to show your reasoning. Comments travel with the application back to HR as you complete your SME review.**

If you change a disposition you are initially indecisive about from failed back to passed, be sure to remove the rejection reason by changing the reason back to " ==Select== " (as the above example shows) in order to enable the disposition to save as "passed ".



Exam (Recruiting) Plan: **2011-00599 - Lion Keeper**
Evaluation Step: **Min E&E + KSA/Competency Evaluation (qualified)**

* Required

Applicant:	**Name**	**Person ID**
	Toast, French	5325391

* Pass/Fail Step: ○ Passed ◉ Failed ○ Other

Reject Reason: Not among pool of most qualified

Comments: Application shows no directly related experience. Recommend do not move forward to MQ. - KE

« Save & View Prev. App | Save | Save & View Next App »

8. Click on 'Save and View Next App" to review a series of applications

9. Review and make a decision about each application.

10. Click 'Save' after last applicant

***Tip*: to review your decisions (dispositions), perform these steps:**

11. Click on 'My SME Review' in the top right of the screen

12. Click on the job title of your exam "Recruiting" plan to see the applicants list and your dispositions

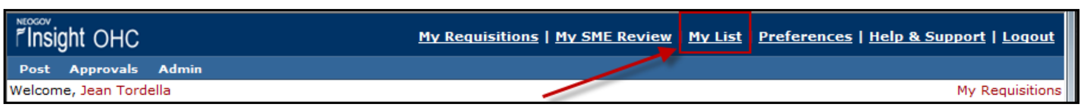
***Tip:* Your saved dispositions are viewable by HR as you do them.**

13. Log out when you are finished.

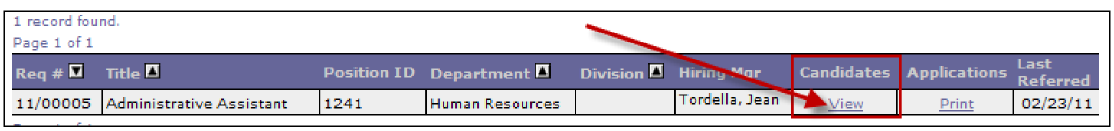
4. Review and Process Referred Applications

View & Process Referred Candidates
(As a Hiring Manager/Liaison)

1. Go to: https://secure.training.neogov.com **for the training site or to https://secure.neogov.com for the live production site**
2. Click on the 'Login' link in the upper-right-hand corner
3. Login using your Department Username and Password (write it to the right for future reference):
4. Select the **'Online Hiring Center - Departments'** radio button, click login (this will take you to the OHC, which is where all non-HR department users will log in)
5. Click the **My List link** in the upper right corner. This will display all referred lists for this Hiring Manager.



6. Click the **View** link in the Candidates column for the applicable requisition.



7. Notice details at the top of the page and sections: Referred, Interview Scheduled, Offer Pending, Hired, Rejection Pending, Rejection
8. From the referred list
   - Review each application
   - Notice a **print** link, if you need it

Tip: **Screen will look similar to example below. View information about the recruitment, comments from HR, the list of applications to consider, and steps to select candidates to interview, recommend for hire or reject from further consideration.**

rovals Admin

ssia Elliott Referı

Requisition #	**2011-00599**	Position Type	**Permanent Full-Time**
Requisition Title	**Zookeeper II**	Vacancies	**1**
Working Title	**Lion Keeper**	HR Analyst	Elliott, Kassia
Department	**Dept of Environment & Natural Resources**	HR Analyst Phone	
Exam (Recruiting) Plan #	**2011-00599**	HR Liaison	Elliott, Kassia
Exam (Recruiting) Plan Title	**Lion Keeper**	HR Liaison Phone	**919-807-4896**
Job	**2011-00599 Lion Keeper**		
Positions	**60033285**		

Comments: 12/15/11 [K. Elliott]: Mary Poppins, currently a Zookeeper I, working with large cats, has promotional priority. KE

12/29/11 [K. Elliott]: Dear Hiring Manager # 1, These candidates all have prior zoo or other related experience. Please let us know if we can help. Thanks! - KE

Referred

	Name	Master Profile	Phone	Email Notify	Exam (Recruiting) Plan #	Action Date	Notices	Verified - Promo Priority	Verified - RIF Priority	Verified - Veteran's Pref	Elig Comments	Referral Expires
☐	Me, Pick	View			2011-00599	12/29/11	N/A					
☐	Pancakes, Buttermilk	View			2011-00599	12/29/11	N/A					
☐	Poppins, Mary	View			2011-00599	12/29/11	N/A					
☐	Toast, French	View		•	2011-00599	12/29/11	N/A					
☐	Wall, Austin	View		•	2011-00599	12/29/11	N/A					

== Select == Go

5 records found.

Interview Scheduled

	Name	Master Profile	Phone	Email Notify	Exam (Recruiting) Plan #	Action Date	Notices	Verified - Promo Priority	Verified - RIF Priority	Verified - Veteran's Pref	Elig Comments	Referral Expires	Interview

== Select == Go

No records found.

Offer Pending

	Name	Master Profile	Phone	Email Notify	Exam (Recruiting) Plan #	Action Date	Notices	Verified - Promo Priority	Verified - RIF Priority	Verified - Veteran's Pref	Elig Comments	Referral Expires	Offer

== Select == Go

No records found.

Hired

	Name	Master Profile	Phone	Email Notify	Exam (Recruiting) Plan #	Action Date	Print PA	Notices	Verified - Promo Priority	Verified - RIF Priority	Verified - Veteran's Pref	Elig Comments	Referral Expires	Hire

== Select == Go

No records found.

Rejected

	Name	Master Profile	Phone	Email Notify	Exam (Recruiting) Plan #	Action Date	Notices	Verified - Promo Priority	Verified - RIF Priority	Verified - Veteran's Pref	Elig Comments	Referral Expires	Rejection

== Select == Go

No records found.

Rejection Pending

	Name	Master Profile	Phone	Email Notify	Exam (Recruiting) Plan #	Action Date	Notices	Verified - Promo Priority	Verified - RIF Priority	Verified - Veteran's Pref	Elig Comments	Referral Expires	Rejection

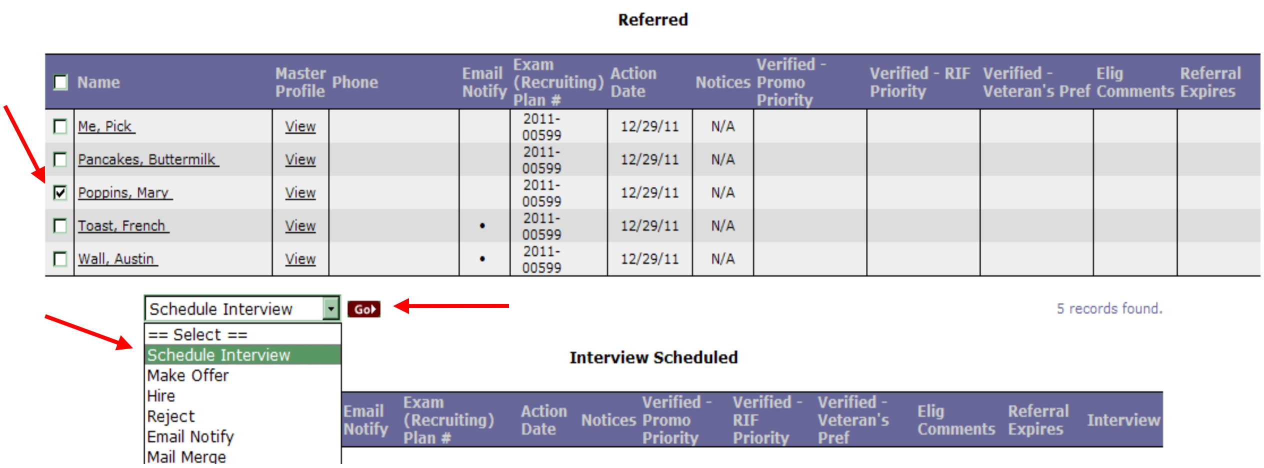
== Select == Go

No records found.

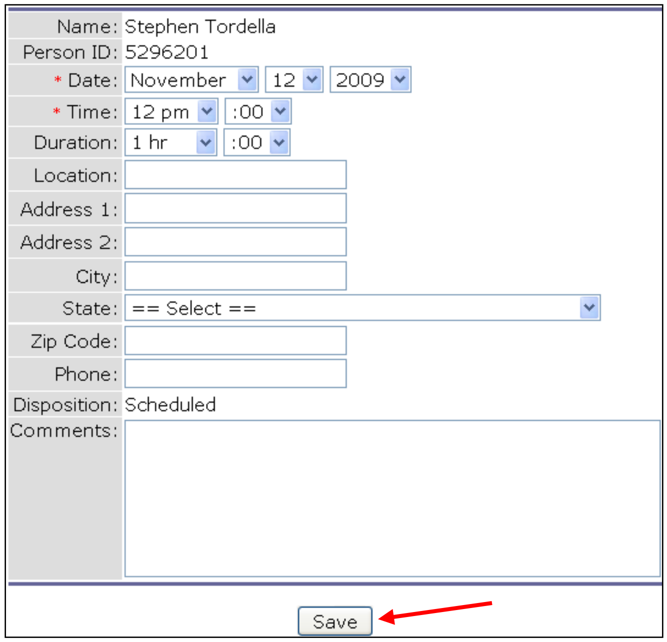
Schedule Interviews

In the Referred section select 1 applicant's check box and Choose Schedule Interview from the Action list under the Referred candidates (**Please note; *<u>this does not actually schedule interviews</u>*; rather, is a mechanism to identify those applicants to be interviewed.) Click on 'Go'.**

Tip: The time entered for the interview is for internal record keeping only; it does not interface with an Outlook calendar. Once an applicant is processed from the 'Referred' section, a Hiring Manager may not return the applicant to that section.



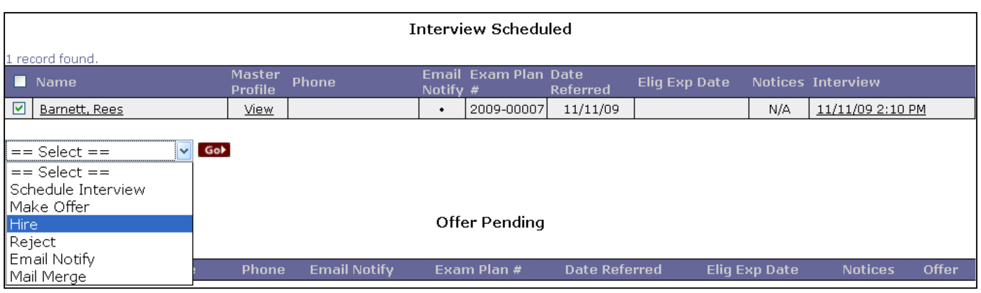
9. Complete the required field in the interview schedule information, make any relevant comments and click on 'Save'. Repeat for each candidate you wish to select for interview.



***Tip:* the next two steps are not described here in the order shown on the screen. You may wish to look at both 'Hire' and 'Make Offer' information before you decide which step(s) best align with your agency's process.**

Make a 'Hire' – Selecting a Candidate as "Hired" – [this means identifying a recommended candidate for hiring approval]

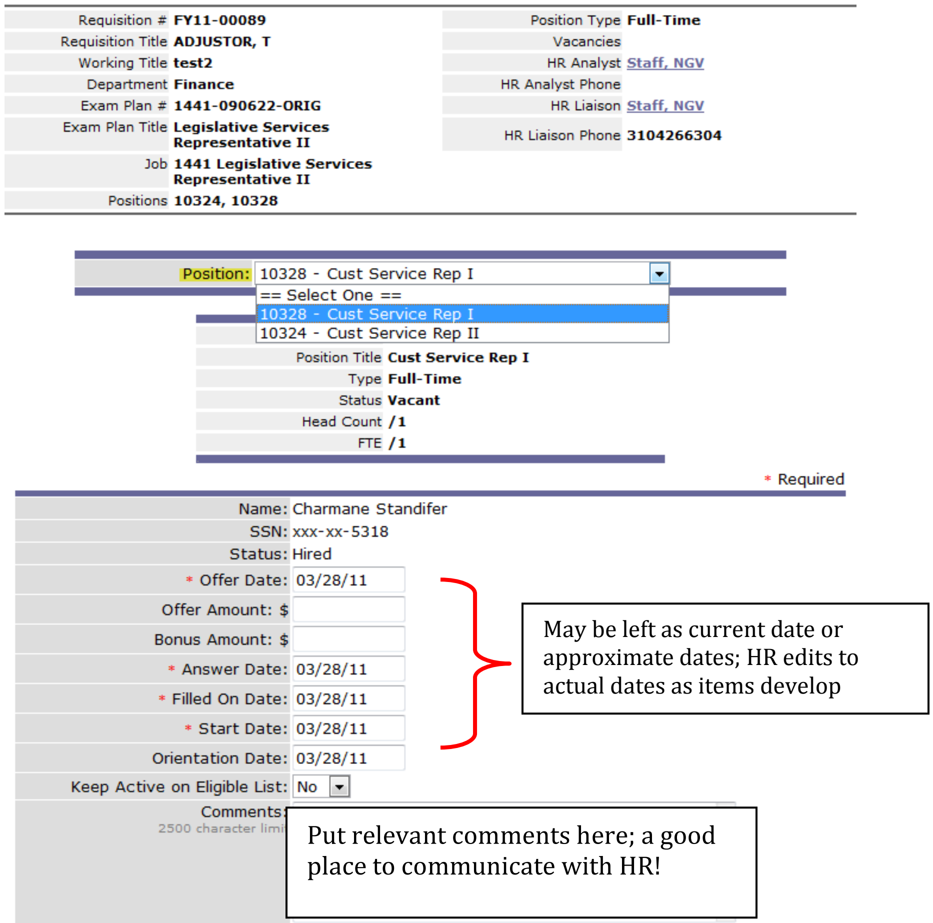
10. From the interviewed candidates, place a check in the box to the left of the chosen applicant's name. Select '**Hire**' from the 'Action' dropdown, click on 'Go'.



11. Update appropriate date fields and enter comments.

- Position: From the pull-down menu, select position being filled.

Note –position(s) displayed is the position(s) specified in the Requisition. Remember, currently we will have 1 vacant position per Requisition.



Requisition #	FY11-00089	Position Type	Full-Time
Requisition Title	ADJUSTOR, T	Vacancies	
Working Title	test2	HR Analyst	Staff, NGV
Department	Finance	HR Analyst Phone	
Exam Plan #	1441-090622-ORIG	HR Liaison	Staff, NGV
Exam Plan Title	Legislative Services Representative II	HR Liaison Phone	3104266304
Job	1441 Legislative Services Representative II		
Positions	10324, 10328		

Position: 10328 - Cust Service Rep I

== Select One ==
10328 - Cust Service Rep I
10324 - Cust Service Rep II

Position Title	Cust Service Rep I
Type	Full-Time
Status	Vacant
Head Count	/1
FTE	/1

* Required

Name:	Charmane Standifer
SSN:	xxx-xx-5318
Status:	Hired
* Offer Date:	03/28/11
Offer Amount: $	
Bonus Amount: $	
* Answer Date:	03/28/11
* Filled On Date:	03/28/11
* Start Date:	03/28/11
Orientation Date:	03/28/11
Keep Active on Eligible List:	No
Comments: 2500 character limi	

May be left as current date or approximate dates; HR edits to actual dates as items develop

Put relevant comments here; a good place to communicate with HR!

12. Click on “No Approvals” OR define the approval chain.

    (see below and next page for details and tips)

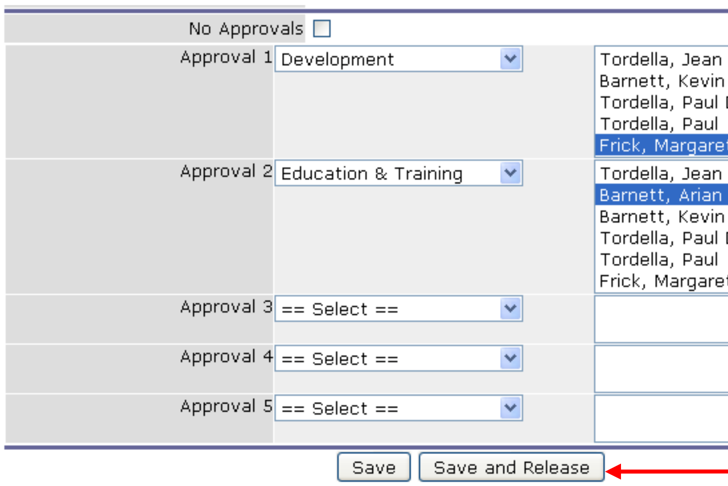
***Tips**:’ No approvals’ sends the hire recommendation to HR; ‘Save” just saves it for your later use; ‘Save and Release’ sends it forward to approvers you have selected and ultimately to HR.*

Based on individual agency practice, the Hiring Manager/Liaison may or may not know the approval chain of command. Agency HR should be able to provide direction regarding the approval chain.

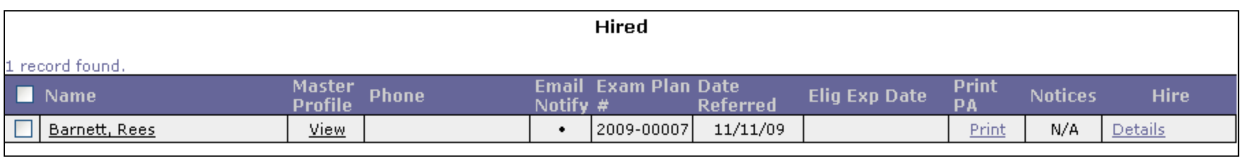
If more than one approver is selected at a given level (example: if Jon Doe and Jane Smith are selected for level 1 approval, then when <u>either</u> Jon or Jane approves and releases the action it is released and an e-mail is sent to the next level approver.) When several levels of approval are needed (e.g. 1, 2, 3), then the levels and e-mail notices occur in sequence.

HR is not listed as an approver, because once all approvers "approve and release" the requisition, it goes automatically to HR.

13. Click on 'Save and Release' button at the bottom of the screen to move the selection forward.



***Tip*: the applicant is marked as hired and moved to the 'Hired' section.**


Hired

1 record found.

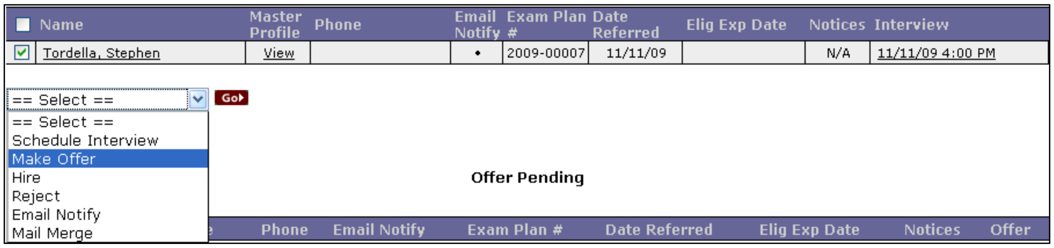
	Name	Master Profile	Phone	Email Notify	Exam Plan #	Date Referred	Elig Exp Date	Print PA	Notices	Hire
☐	Barnett, Rees	View		•	2009-00007	11/11/09		Print	N/A	Details

Remember, this does not mean the selected candidate is Hired. Rather, this identifies the Recommended Candidate.

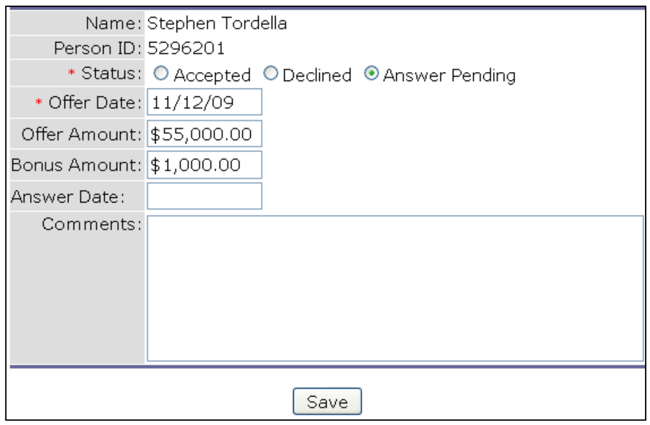
Make an Offer – [Alternate or additional step before a 'Hire' is made – *optional use*]

***Tip:* Use not required by E-Recruit; however, you may want to place back up candidate choice here in the event the selected for hire candidate declines or is no longer available.**

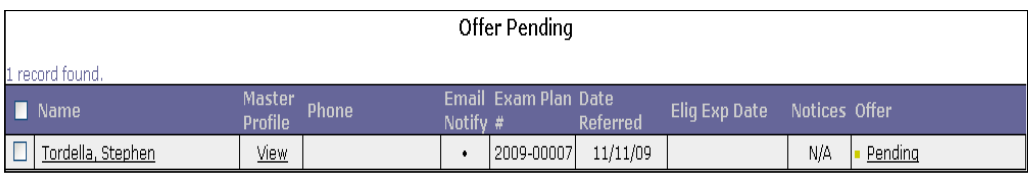
1. After placing a check in the box to the left of the chosen candidate's name, In the 'Action' dropdown select 'Make Offer', click on 'Go'.



2. Fill in the offer data any other information you desire to track.

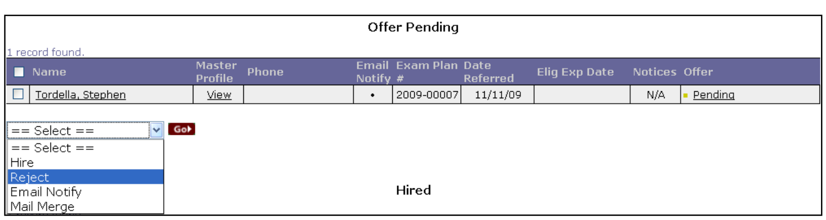


3 Click 'Save'. The applicant is now listed under the Offer Pending section



Reject Candidate(s)

1. To mark an applicant as rejected, choose 'Reject' from the 'Action' dropdown from any section (referred, interview scheduled, offer pending, or hired), click on 'Go'.

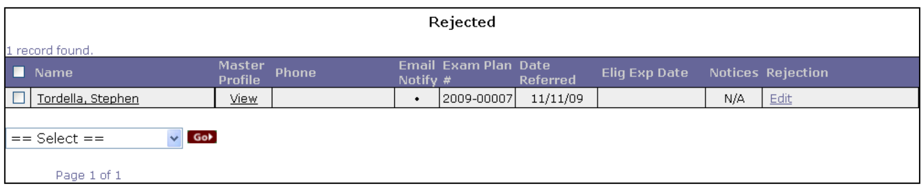


2. Select a 'Reason'and add any relevant comments.

***Tip:* when you hold back (reject) a candidate from further consideration, you must select a reason from the pull down menu. Best practice and communication protocols ask that you also enter a comment to show your reasoning. Comments travel with the application back to HR.**

3. Click Save.

4. The Applicant is marked as “rejected” and moved to the ‘Rejected Pending’ section.



Rejected

1 record found.

	Name	Master Profile	Phone	Email Notify	Exam Plan #	Date Referred	Elig Exp Date	Notices	Rejection
	Tordella, Stephen	View		•	2009-00007	11/11/09		N/A	Edit

== Select == Go

Page 1 of 1

Tips: At the conclusion of this process, all candidates should be showing in ‘Hired’ or ‘Rejection Pending’ status

Once candidate is hired and working and credentials are verified, all unselected candidates for this employment action can be moved to the rejected list – this is usually initiated by HR.

5. Log out

5. Create and Send Notices to Applicants

Tip: **use of this function is controlled by the agency; based on individual agency determination, Departments may be able to send notices developed by HR, be able to develop and send their own notices or all notices may be developed and sent from HR.**

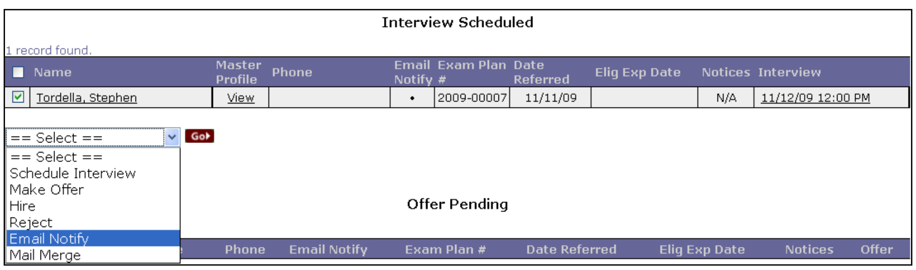
Send Notices from the OHC

[Use of this functionality controlled by the agency]

****Note:** The functionality will only appear if the following conditions are met:

- From 'Agency Preferences' under the Admin link in Insight, the 'OHC Notices' option must be turned 'on' by the Insight Administrator
- From 'Department Users' under the Admin link in Insight, the OHC user must be granted permission to 'Send OHC Notices'

1. From any section of the "Referred List" a notice may be sent. Select the applicant(s) you'd like to send notices; in the 'Select' menu, choose 'Email Notify' followed by 'Go'



2. 'Select Email Format' to be 'Text' or 'HTML' depending on the notice configuration; 'Select Template' from the predefined templates

3. Select the 'Generate Notices' button

Requisition: 2009-00007 - Sr. Accountant

Select Email Format: Text

Select Template: Interview Scheduled

Candidate	Person ID	Email	Date & Time Received
Tordella, Stephen	5296201	sjt@home.com	02/24/09 12:53 PM

Generate Notices

4. View the formatted notice to ensure the text is as designed prior to sending the notices

View Referred Candidates

Requisition: 2009-00007 - Sr. Accountant

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

Template: **Interview Scheduled**

Candidate	Person ID	Email	Date & Time Received
Tordella, Stephen	5296201	sjt@home.com	02/24/09 12:53 PM

Send

Email 1 (To: sjt@home.com)

Replies to this email will be sent to Jean Tordella <jtordella@gmail.com>

Example Template:
November 12, 2009

Stephen Tordella
White House Row
Arlington, VA 02778

Dear Stephen:

We are sorry to inform you that your application for Sr Accountant 0204 was not accepted because it did not indicate that you met the education requirement for this position.

Any request for reconsideration must be made in writing immediately.

Very truly yours,

<Analyst_FirstName> <Analyst_LastName>
Jean Human Resources Department

If you applied online, please verify you have received this message by visiting: http://training.governmentjobs.com /js_login.cfm?OHCResponseCode=91842

5. Verify email sent

Requisition: 2009-00007 - Sr. Accountant

Emails sent successfully.

Template: **Interview Scheduled**

Candidate	Person ID	Email	Date & Time Received
Tordella, Stephen	5296201	sjt@home.com	02/24/09 12:53 PM

6. Notices are stored in the applicants Master Profile and viewable from the 'Notices' link

1 record found.

	Name	Master Profile	Phone	Email Notify	Exam Plan #	Date Referred	Elig Exp Date	Notices	Interview
	Tordella, Stephen	View		•	2009-00007	11/11/09		View	11/12/09 12:00 PM

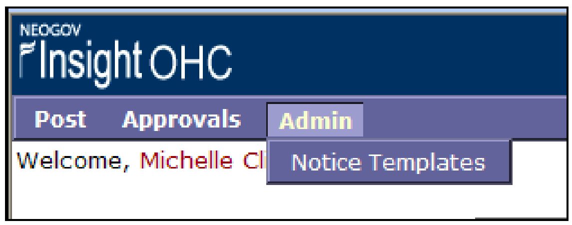
Create OHC Notice Templates as a Department User

[Use of this functionality controlled by the agency]

****Note:** The 'Admin' link will only appear if the following conditions are met:

- From 'Agency Preferences' under the Admin link in Insight, the 'OHC Notices' option must be turned 'on' by the Insight Administrator
- From 'Department Users' under the Admin link in Insight, the OHC user must be granted permission to 'Create OHC Notice Templates'

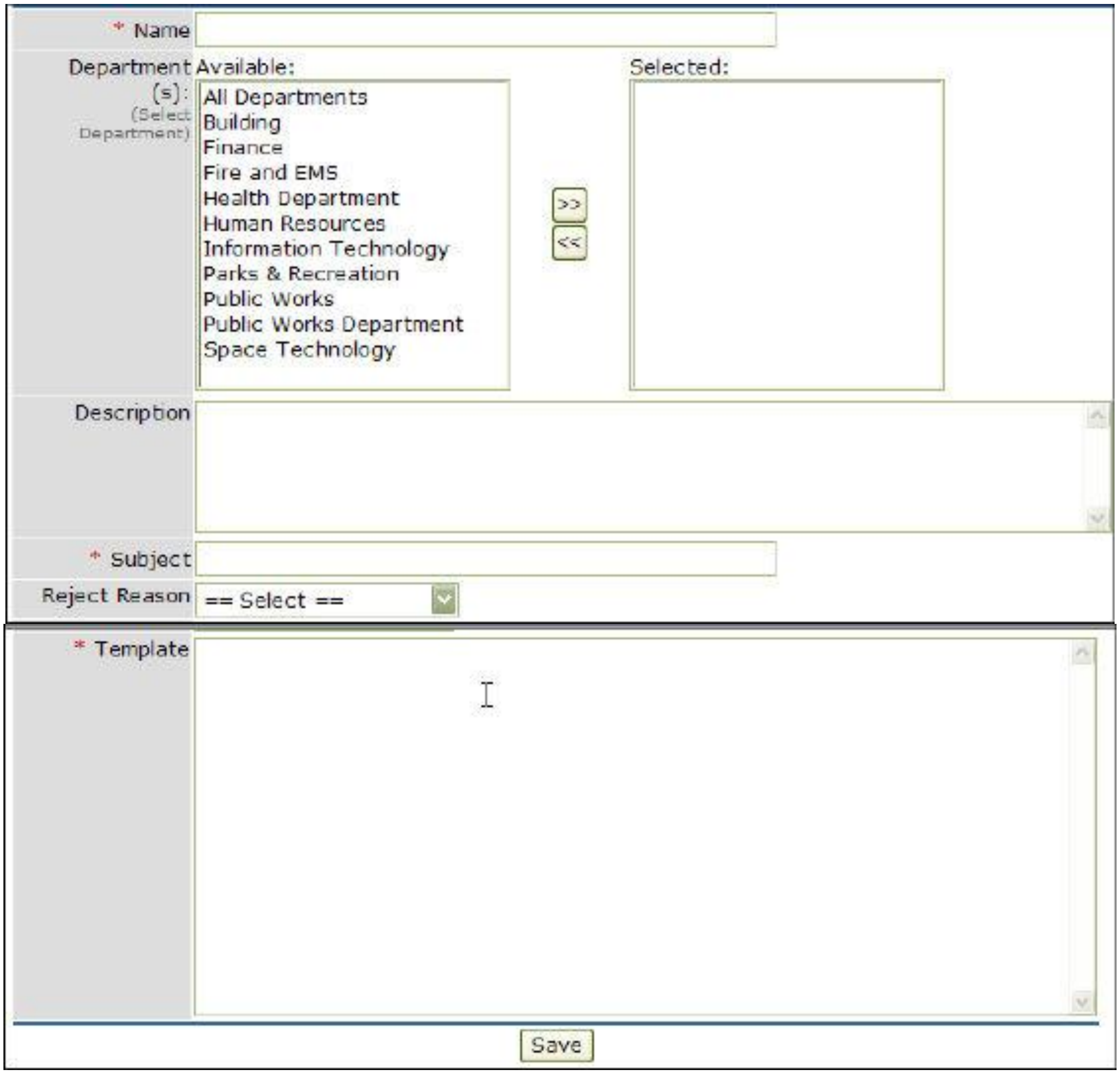
1. Select 'Notice Templates' from the 'Admin' pull-down menu



2. A listing of previously created templates (if any) will appear.

3. Click 'Add New Template'

4. Complete the 'OHC Template' form, including:
   - **Name** – Notice template name
   - **Department Available** – Authorized users from the specified departments can copy this template
   - **Description** – Notice template description
   - **Subject** – Email template subject
   - **Rejection** – Associated reject reason (If applicable)
   - **Template** – Define the notice template text
     - A sample template is provided within the OHC
     - Available automatic text fields are located and defined at the bottom of the 'OHC Notice Template' form


* Name
Department (s):
(Select Department)
Available:
All Departments
Building
Finance
Fire and EMS
Health Department
Human Resources
Information Technology
Parks & Recreation
Public Works
Public Works Department
Space Technology
>>
<<
Selected:
Description
* Subject
Reject Reason
== Select ==
* Template
Save

Example Template:

<Today>

<Applicant_FirstName> <Applicant_LastName>
<Applicant_Address1>
<Applicant_City>, <Applicant_State> <Applicant_ZipCode>

Dear <Applicant_FirstName>:

We are sorry to inform you that your application for <Position_Title> was not accepted because it did not indicate that you met the education requirement for this position.

Any request for reconsideration must be made in writing immediately.

Very truly yours,

<Analyst_FirstName> <Analyst_LastName>
<Agency_Name> Human Resources Department

Copy the merge field(s) below and paste it into your email template above.

Applicant Merge Fields

Field Name	Merge Name	Field Name	Merge Name
First Name	<Applicant_FirstName>	Last Name	<Applicant_LastName>
Middle Name	<Applicant_MiddleName>	Address 1	<Applicant_Address1>
Address 2	<Applicant_Address2>	City	<Applicant_City>
State	<Applicant_State>	Zip Code	<Applicant_ZipCode>
Country	<Applicant_Country>	Home Phone	<Applicant_HomePhone>
Other Phone	<Applicant_OtherPhone>		

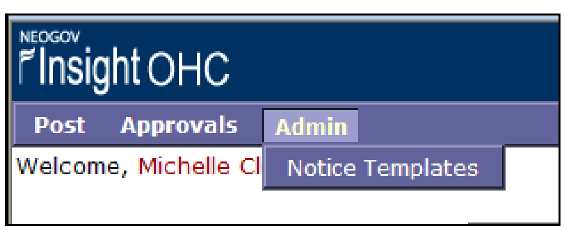
5. Click the 'Save' button

6. The ‘OHC Notice Template’ screen is displayed including the new template.

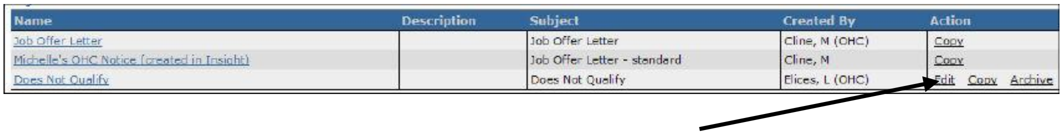
Edit OHC Notice Templates from the OHC as a Department User:

[Use of this functionality controlled by the Agency]

1. Select 'Notice Templates' from the ‘Admin’ pull-down menu



2. A listing of previously created templates will appear.

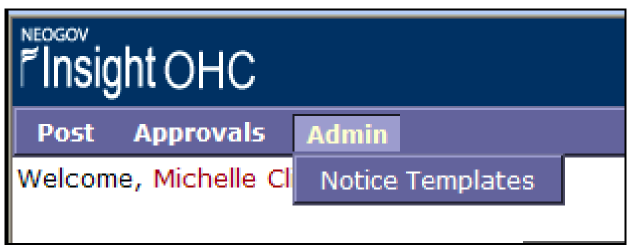


3. Click 'Edit' next to the specific template. (Department Users do not have access to edit notices created by other users.)
4. Make the appropriate changes.
5. Click the 'Save' button
6. The 'OHC Notice Template' screen is displayed including the new template.

Copy OHC Notice Templates from the OHC as a Department User:

[Use of this functionality controlled by Agency]

1. Select 'Notice Templates' from the 'Admin' pull-down menu

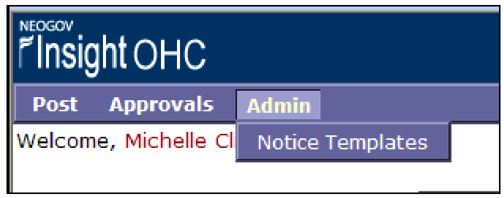


2. A listing of previously created templates will appear (templates created by users with the same Department access).

3. Click 'Copy' next to the specific template.
4. A new window will open with a copy of the selected template.
5. Click the 'Copy' button.
6. When the template opens, make any necessary changes.
7. Click 'Save'

Archive OHC Notice Templates from the OHC as a Department User:
[Use of this functionality controlled by the Agency+]

1. Select 'Notice Templates' from the 'Admin' pull-down menu



2. A listing of previously created templates will appear (templates created by users with the same Department access).

3. Click 'Archive' next to the specific template. (Department Users do not have access to archive notices created by other users.)
4. A pop-up window will ask if you are sure you want to archive the specific template.
5. Click the 'OK' button

OHC Notices can also be created by HR Users from the Candidate Track menu in Insight and are assigned to one or more departments. Insight users have the ability to create OHC Notices and edit notices created by OHC Users.