E-Recruitment

Online Hire Center (OHC) Reference Guide

Last Revised: 10/08/07

OHC Overview and Implementation Considerations

OHC Overview

Implementation of the Insight Online Hiring Center (OHC) allows an agency to recognize the full benefits of the Insight Enterprise product. Rolling out the Online Hiring Center within your agency will enable hiring departments to create requisitions to fill vacant positions online, electronically route the requisitions for approval, review applications online and designate applicants for interview or hire online. Fully leveraging this functionality can save significant staff time, processing time and paper in the hiring process.

The following table lists the various functions and the user roles that can perform each of these functions.

OHC Functions	User Role
Creation of Requisitions	Originator, HR Liaison
Approval of Requisitions	Approver
SME Review*	SME*
Referral List Review	Hiring Manager (HR Liaison can view)
Approval of Hires	Approver

* Advanced Feature

Definitions of User Roles in the OHC

- **HR Liaison** – An agency user who can create requisitions, view requisitions created by others within the agency to which they have access, view SME Lists and Referral Lists, and manage department user accounts within the agency to which they have access.

- **Approver** – An agency user who can approve or deny requisitions or hires that have been routed to him/her for approval.

- **Subject Matter Expert (SME)*** – is a user in a hiring department who has specialized knowledge that enables them to evaluate applicants in a particular field of expertise. Applications can be assigned to a SME for review and scoring during the evaluation steps of an exam plan, prior to placing applicants on an eligible list.

- **Originator** – An agency user who can only create requisitions and cannot view other user's requisitions. Users can either have access as an HR Liaison or an Originator, but not both.

- **Hiring Manager** – An agency user who can view referred applicants from an eligible list and take action to interview, offer, hire, or reject an applicant. All hire actions completed by the hiring manager may be routed through additional approvers before being released to HR for final approval.

NOTE: Users may be assigned multiple roles within the OHC. The default is currently set to allow new OHC users to be an Originator, an Approver, and a Hiring Manager. This is how users were setup in the initial training conducted by OHR. Each agency should become familiar with the various roles and identify which functions agency users need access to. Your OHR consultant can help you prepare an implementation plan for the OHC.

Implementation Considerations

OHC users may vary in their setup depending on a variety of factors, such as:

- Size of agency
- Number of users to be trained
- Use of HR Liaisons
- Internal business processes

When preparing for implementation, consider the following approaches:

- **Division by division** – Recommended for large agencies with large recruiting volumes. Consider implementing with a single pilot division first and then within 2 weeks of implementing, developing a plan for integrating remaining departments over the next two to three months.

- **Train-the-trainer approach** – Train a few users within each department and have them train the hiring managers on the system in their specific department.

- **Train all HR Liaisons** – on their functionality in the system as well as explain the basic internal hiring process so they can assist the hiring manager.

- **As needed (as a vacancy arises)** – Recommended for smaller agencies with lower recruiting volume and hiring managers who hire infrequently.

Requisition Approval Process:

The Insight Requisition Approval process provides the mechanism for routing requisitions for approval according to the routing path designated by the initiator of the requisition. The OHC provides the flexibility for users to route a requisition according to your agencies business rules without confining the user to a pre-defined routing process for every requisition. In the same way that staff would need to ensure that a paper requisition was routed appropriately, OHC users are responsible to ensure that the appropriate approval routing is selected. The process need not be identical for every department or every requisition within a department.

To set up the approval process, you need to first identify who the approvers are within your agency.

NOTE: For more information about the requisition approval process, please refer to "Approver Role" section of this Reference Guide. More information may also be found in the User's Guide located in the Help & Support Section.

Security Considerations for HR Liaisons:

HR Liaisons have the ability to:

- View requisitions and recruiting information throughout the entire agency to which they have been granted access.
- View the referred list for any requisitions within their department(s). They cannot, however, take action on a referred list unless they are designated as a hiring manager.
- Add or edit department user accounts within their department(s). The use of HR Liaisons can be extremely helpful, particularly in large agencies where there are many users within a department.
- Be assigned the role of creating new user accounts, training users within their department and providing assistance to hiring managers in using the OHC.

NOTE: Because their access is so broad, it is important that this access only be granted to users who are truly working in an "HR Liaison" capacity and have a business reason to have access to all referred lists within their department(s).

SME Review:

SME Review is an advanced feature of the system that most agencies will not use. If your agency has a need to utilize this function, please review the following for informational purposes.

- The purpose of a Subject Matter Expert (SME) Review is to have a person within the hiring department who is more familiar with the specifics of the position review the applications, typically after HR's initial screening and before the hiring manager review. SME's review applications while the applicants are still within the evaluation steps in the exam plan, prior to moving applicants onto an eligible list.

- When the SME reviews the applications within the OHC and takes action (enters scores or pass/fail) on the application the information is viewable in Insight.

- Currently, the SME should notify HR once they have completed their review.

- Define any special 'comments' you want the OHC users to add when reviewing applications to be consistent.

- Applications can be sent to multiple SME's at the same time.

- If interested in utilizing this function, please contact your OHR Consultant for more information.

Tips:

- Agency human resources staff should define which fields on the requisition form should be completed (in addition to the required fields) to ensure consistency among requisitions and to provide HR with the necessary information to create the job posting.

- Hiring managers must move referred candidates through the "Schedule Interview" and the "Hired" steps in order to accurately capture EEO reporting information.

- HR managers need to inform their OHC users that the system will not accommodate internal or promotional postings.

- Provide OHC users access to the test environment so they can practice using the system before it is time for them to work in the live production system. NOTE: To set up users in the training and production sites, you must first contact OHR for access.

- Work with and train ONE department first before you try to train all the other departments. Spend more time with this first department to define the process and work together on any issues that arise on either side. Then you will be able to train the other departments more quickly and thoroughly.

- Communicate any new enhancements or changes to the system so OHC users are aware of how to use the newest features.

- Before implementing the OHC you may want to contact your OHR Consultant at 803-737-0900 to assist you with implementing the OHC function of the NEOGOV system.

OHC Training Guide

ORIGINATOR ROLE

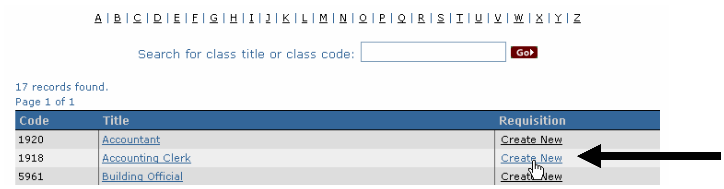
- **Originator** – An agency user who can only create requisitions and cannot view other user's requisitions. Users can either have access as an HR Liaison or an Originator, but not both.

<u>Create a Requisition (As an Originator or HR Liaison – this role may also be played by the hiring manager/supervisor depending on your agency)</u>

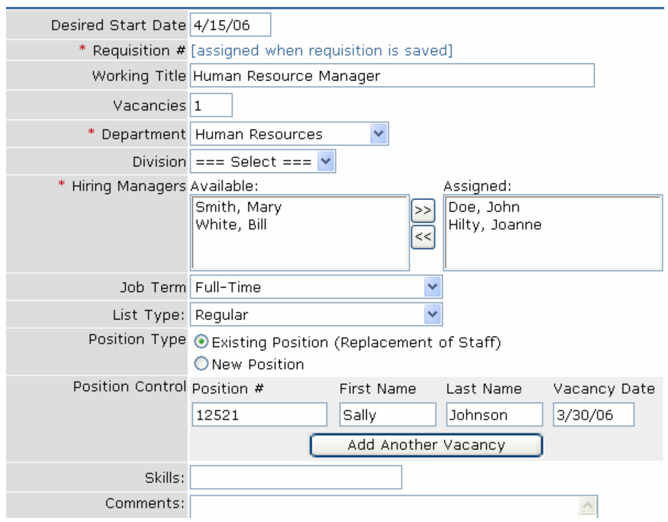
1. Go to: **69.225.112.10 (Training Environment)** or **<u>www.neogov.com</u> (Live Site)**
2. Click on the 'Login' link in the upper-right-hand corner
3. Enter your <u>Online Hire Center (OHC)</u> Username and Password (write it to the right for future reference):
4. Select the **'Online Hiring Center – Departments'** radio button, click login

5. Click on 'Open New Requisition'

6. Search for a class specification for which you want to create the requisition
7. Click on 'Create New' in the Requisition column (all the way to the right-hand side)



8. Fill in the requisition form, **select the name of the 'Hiring Manager' who will receive the referred list of candidates.**



Enter the requisition information:

- **Requisition Number –** This field is automatically assigned a requisition number
- **Department –** Requisition requesting agency
- **Division –** Requisition requesting agency division (if applicable)
- **Hiring Manager –** Hiring Manager to receive the eligible list of referred candidates
- **Job Term –** Select the appropriate job term from the list (i.e. full-time, part-time, etc.)
- **List Type –** Always select **"Regular"**
- **Position Type -** indicate if the requisition is to fill an existing position (replacement of existing staff) or if it is a newly created position (if applicable)
- **Vacancy Information** – Track the vacancy by position number, first name, last name, and vacancy date information for the person leaving (if applicable). Once you click the 'Add Another Vacancy' icon, you will be required to fill in the position number, name and vacancy date information. For vacant positions, enter the position number and a placeholder value such as "New Position" for the name, etc.
- **Skills –** Input the skill keywords for this requisition (optional)

- **Comments –** Requisition comments (optional). [NOTE: The comments section should be utilized carefully since the information may be subject to disclosure under the Freedom of Information Act (FOIA).]
- **Custom fields –** Your agency may have custom fields below the 'Comments' box. Check with your system administrators for specific instructions on completing these fields.

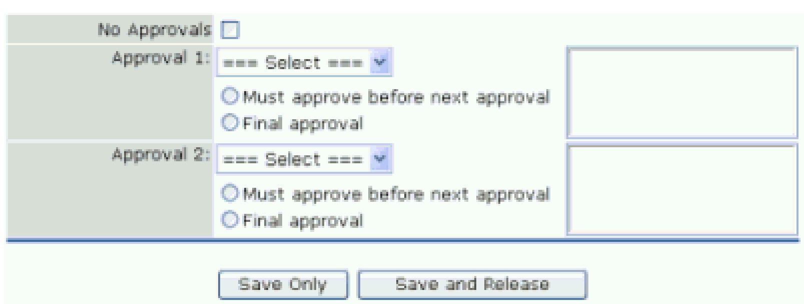
9. Check the 'No Approvals' box at the bottom of the screen if no approvals are necessary

OR:

When an Originator or HR Liaison is creating a new requisition, instead of checking the 'No Approvals' box as instructed in # 9 above, proceed to Approval 1 and follow the instructions below:

a. You must select at least one approver from each selected approval level. Selected approvers will be highlighted in blue.

b. If multiple approvers are selected within an approval level, notifications will be sent to each approver selected. Once one of the approvers in that level have approved the requisition, it will be approved for that level and notification will be sent to the next approval level.



10. After selecting the final approval, click on the appropriate button at the bottom of the form.

- 'Save Only' button – Saves the requisition and does not route it for approval
- 'Save and Release' button – Saves the requisitions and automatically routes to the first approval level (If the 'No Approvals' box is checked, the requisition will route directly to the HR Analyst)

11. The new requisition is displayed in the ‘My Requisitions’ section of the OHC and routed to the appropriate next approval step (if applicable)

NOTE: Automatic email notifications are sent to the department liaison, all defined department approvers, the hiring manager, and the HR analyst responsible for that department/division’s requisitions.

12. Click on ‘Save and Release’
    - Select Save (if you are not going to send to HR immediately-need to review information at a later time) or;

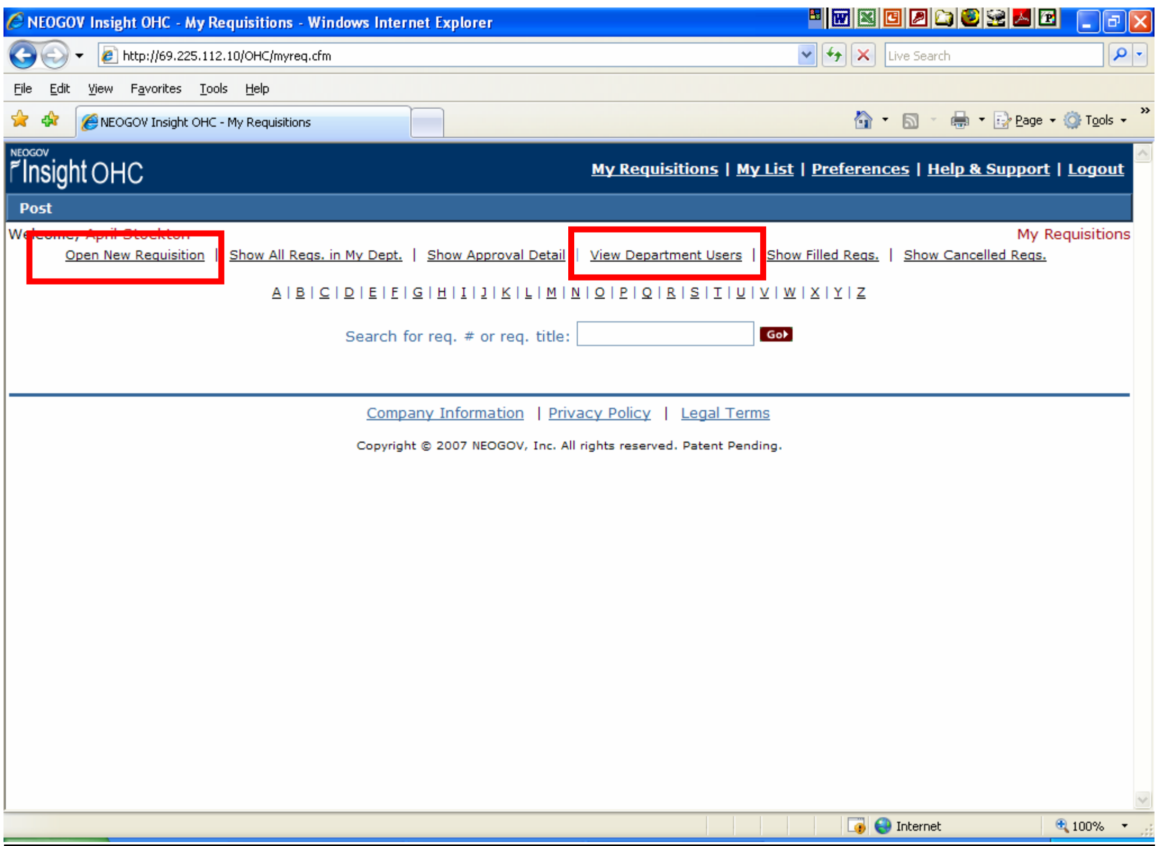
13. Click on the ‘Logout’ link in the upper-right-hand corner

NOTE: The Approval process is used by the Originator/HR Liaison (which may also be the hiring manager) to obtain the necessary on-line approvals when required. For more information about using the approval function, see the section of this guide titled “Approver Role”.

HR LIAISON ROLE

- **HR Liaison** – An agency user who can create requisitions, view requisitions created by others within the agency to which they have access, view SME Lists and Referral Lists, and manage department user accounts within the agency to which they have access.

- The main difference between the Originator Role and The HR Liaison Role is the access level. HR Liaison's have access to all requisitions in the entire agency, whereas, Originator's only have access to the requisitions they create. HR Liaison's also have the ability to enter new OHC users into the system.



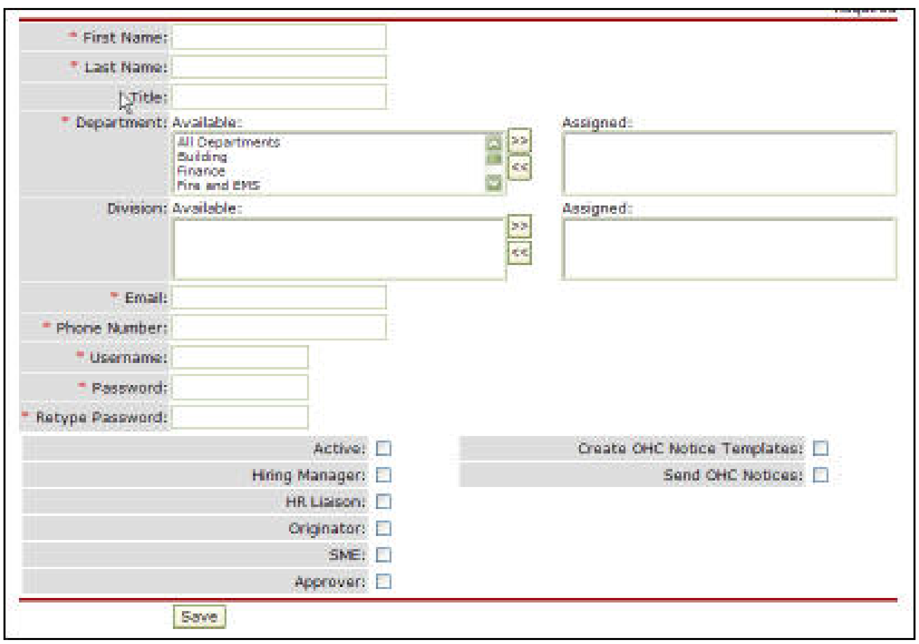
- HR Liaison's have the additional functionality to view, add, and inactivate new OHC users.

- HR Liaison's will follow the same steps (1- 13) shown in the "Originator" section above to 'Create Requisition'.

Add a New Department User Account

1. Click on ‘View Department Users’ in the OHC
2. The ‘Department Users’ screen is displayed displaying all existing department users
3. Click the ‘Add New User’ link

4. Complete the department user information:



- **First Name –** User’s first name
- **Last Name –** User’s last name
- **Department** – User’s department (Agency)
- **Division** – User’s division
- **Email –** User’s email address
- **Phone Number –** User’s phone number
- **Username –** Username required to access the Online Hiring Center (OHC) NOTE: NEOGOV recommends adding new usernames beginning with sc, the first initial of the first name, followed by last name. For example, Jane Doe would be scjdoe.

- **Password –** Password required to access the OHC
- **Active –** Account active
- **Hiring Manager** – User can view referred applicant list and application materials
- **HR Liaison –** User can create requisitions, view requisitions of others in department, and add new department users (NOTE: User can be an HR Liaison or an Originator, not both. It is recommended that agencies only grant access as an HR Liaison to those employees serving in an HR role)
- **Originator –** User can create requisitions (User can be an HR Liaison or an Originator, not both)
- **SME** – User can view and rate applicants assigned to them for subject matter expert review.
- **Approver –** User can approve/deny requisitions
- **Create OHC Notice Templates** – User can create notices that other OHC users can send. (NOTE: It is not recommended that users be granted access to creating new templates or sending notices)
- **Send OHC Notices –** User can send notices from the OHC, but is not authorized to create them. (NOTE: It is not recommended that users be granted access to creating new templates or sending notices)

5. Click the 'Save' button

6. The Department User is displayed within the 'View All Department Users' list

Edit or Inactivate a Department User

1. Click on View Department Users in the OHC

2. The 'Department User' screen is displayed displaying all existing department users

3. To Search for a department user:
   - Enter the last name of the user in the 'Search for user:' box
   - Click the 'Go' Button
   - You may also filter users by letter by clicking on the appropriate letter located above the search box.

5. Click the 'Edit' link associated with the department user

6. The 'Department User Edit' screen will appear

7. Complete the necessary modifications

   NOTE: To Inactivate an account, uncheck the box beside the Active field.

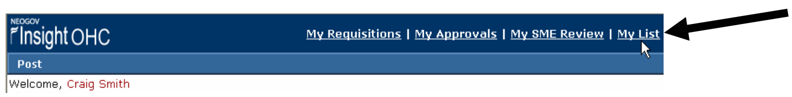
8. Click the 'Save' button located at the bottom of the screen
   - To exit without saving, click the Internet Explorer 'Back' button

HIRING MANAGER ROLE

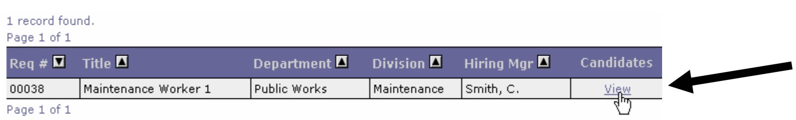
- **Hiring Manager** – An agency user who can view referred applicants from an eligible list and take action to interview, offer, hire, or reject an applicant. All hire actions completed by the hiring manager may be routed through additional approvers before being released to HR for final approval.

View Referred Candidates (As a Hiring Manager/Supervisor)

1. Go to: **69.225.112.10 (Training Environment) or www.neogov.com (Live Site)**
2. Click on the 'Login' link in the upper-right-hand corner
3. Enter your Online Hire Center Username and Password
4. Select **'Online Hiring Center - Departments'** radio button, click login
5. Click on the 'My List' link in the upper-right-hand corner (this will display all referred lists for this Hiring Manager)



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

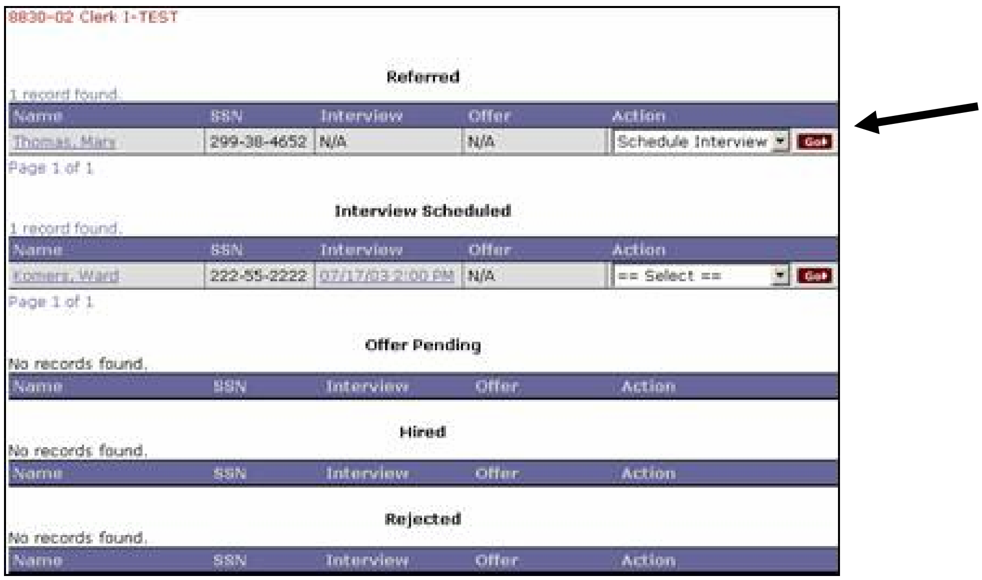


7. Click on the applicant's name to view their application
8. The candidates complete application is displayed to enable hiring managers to review applications and make decisions on who to interview, make offers, hire, or reject

Schedule an Applicant Interview (As a Hiring Manger/Supervisor)

NOTE: In order to accurately capture the applicants who are interviewed for the position, hiring managers need to select "Schedule Interview" from the 'Action' dropdown from the 'Referred List'. Once a candidate has been moved through this step, the system will save the candidate's information for EEO-4 reporting purposes.

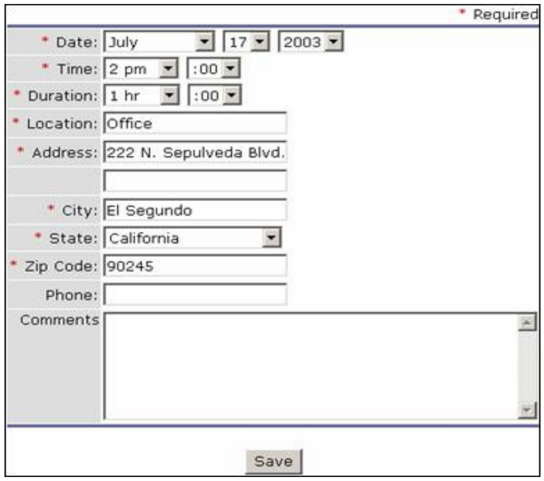
9. From the 'Referral List', find the name of the Candidate to be interviewed
10. Select 'Schedule Interview' from the 'Action' dropdown



11. Click on the 'Go' icon
12. The 'Schedule Interview' screen is displayed
13. Complete the interview information:

- **Date** – Interview date
- **Time** – Interview time
- **Duration** – Interview length
- **Location** – Physical interview location
- **Address** – Physical interview address
- **City** – Physical interview city
- **State** – Physical interview state
- **Zip Code** – Physical interview zip code
- **Phone** – Physical interview phone number

- **Comments** – Interview scheduling comments [NOTE: The comments section should be utilized carefully since the information may be subject to disclosure under the Freedom of Information Act (FOIA).]

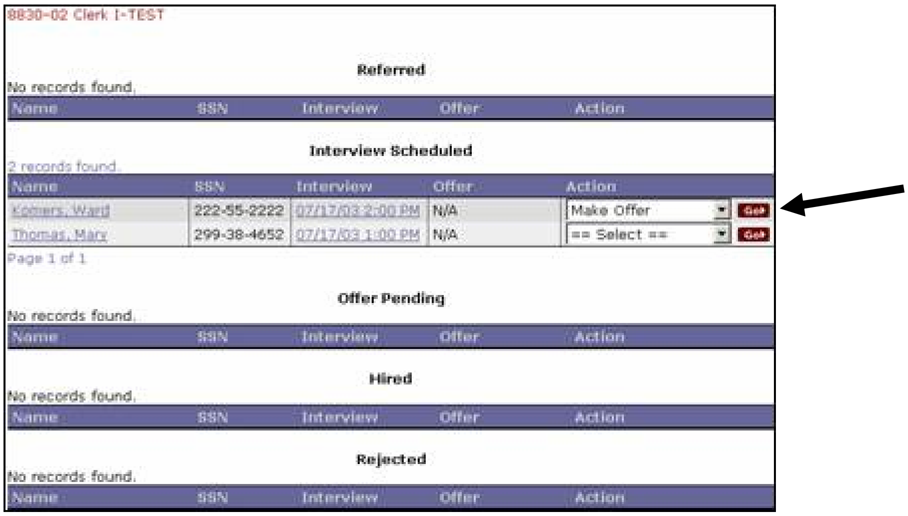


14. Click the 'Save' button
15. The applicant record is advanced to the 'Interview Scheduled' section

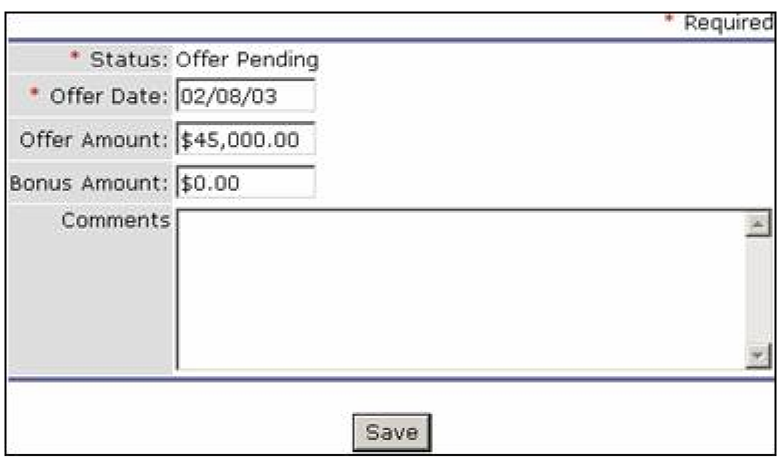
NOTE: To review the interview information, click on the link within the 'Interview' column

Record an Applicant Offer and Mark as Accepted/Declined (as a Hiring Manager /Supervisor)

16. The 'Referred Candidates' screen is displayed
17. Choose 'Make Offer' from the 'Action' dropdown

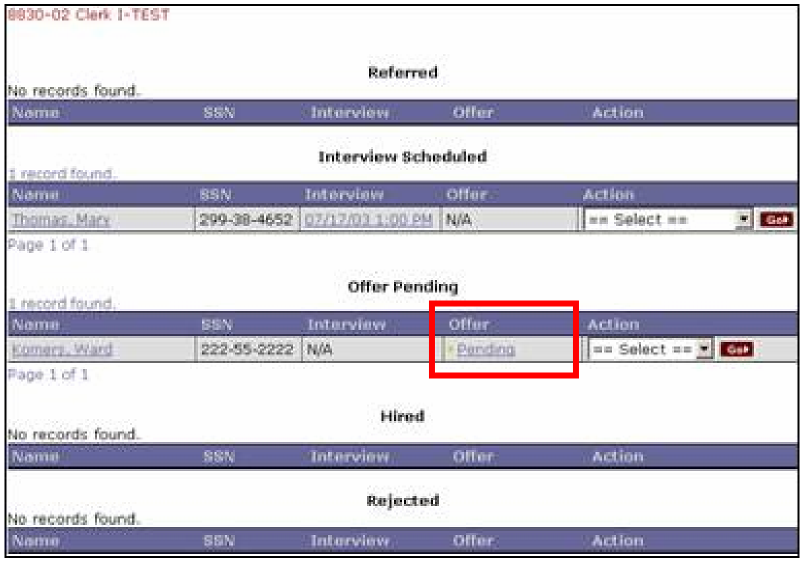


18. Click the 'Go' icon
19. The 'Make Offer' screen is displayed
20. Input the offer information:
    - **Offer Date** – Date of offer
    - **Offer Amount** – Dollar amount offered
    - **Bonus Amount** – Bonus dollar amount offered
    - **Comments** – Offer comments



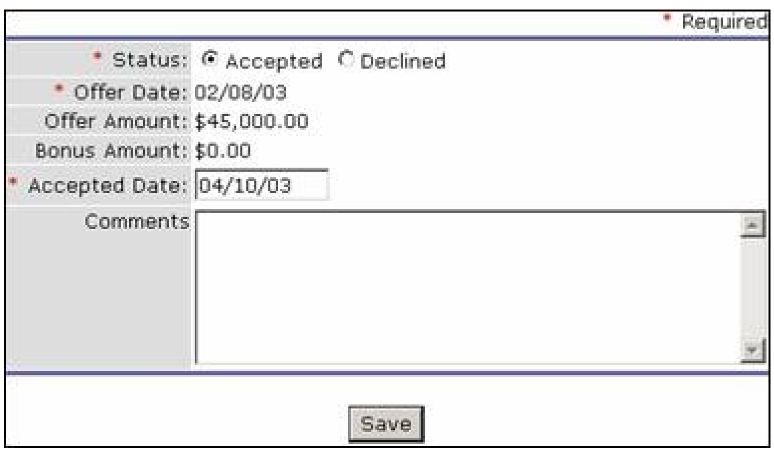
21. Click the 'Save' button
22. The applicant record is advanced to the 'Offer Pending' section

- The ‘Offer’ column displays ‘Pending’

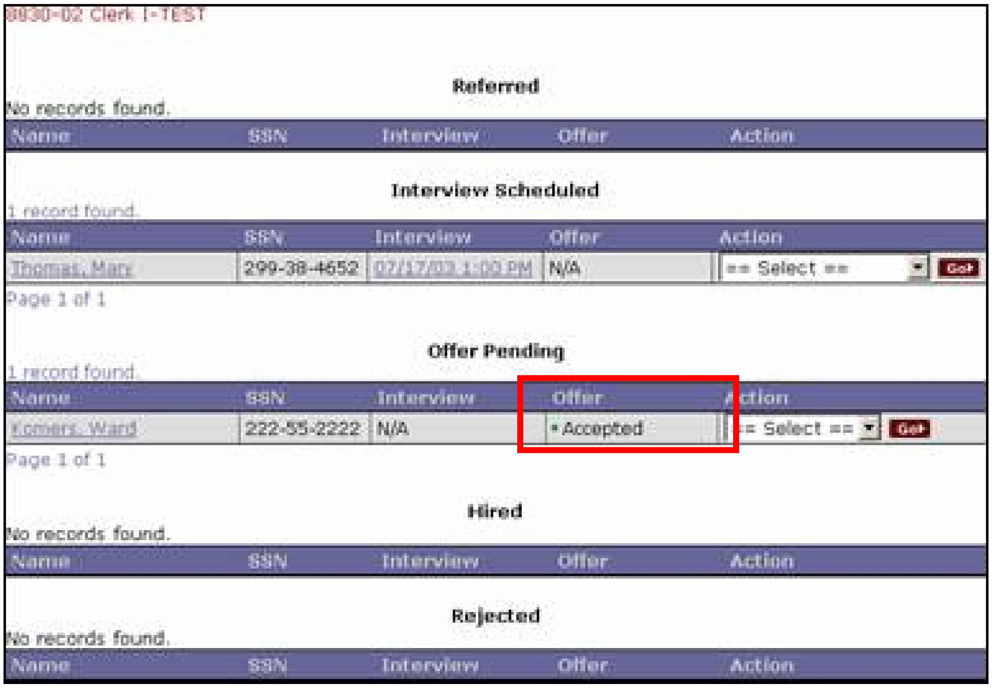


23. To mark the offer as accepted/declined:

- Click on the ‘Pending’ link within the ‘Offer’ column
- The ‘Make Offer’ screen is displayed



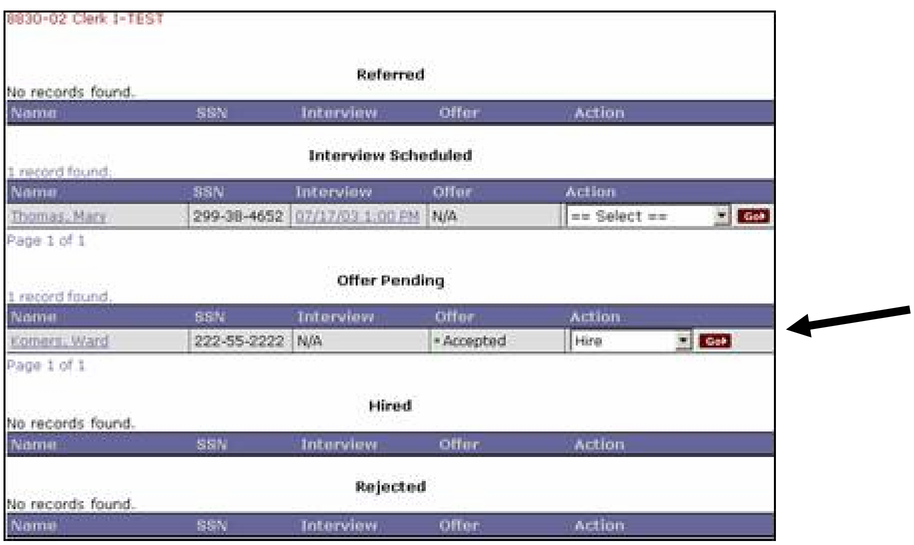
- Select the appropriate ‘Status’ radio button
- Update the ‘Accepted Date’ if necessary
- Click the ‘Save’ button
- The ‘Referred Candidates’ screen is displayed
- The applicant ‘Offer’ information is updated



Mark an Applicant as Hired (as a Hiring Manager/Supervisor)

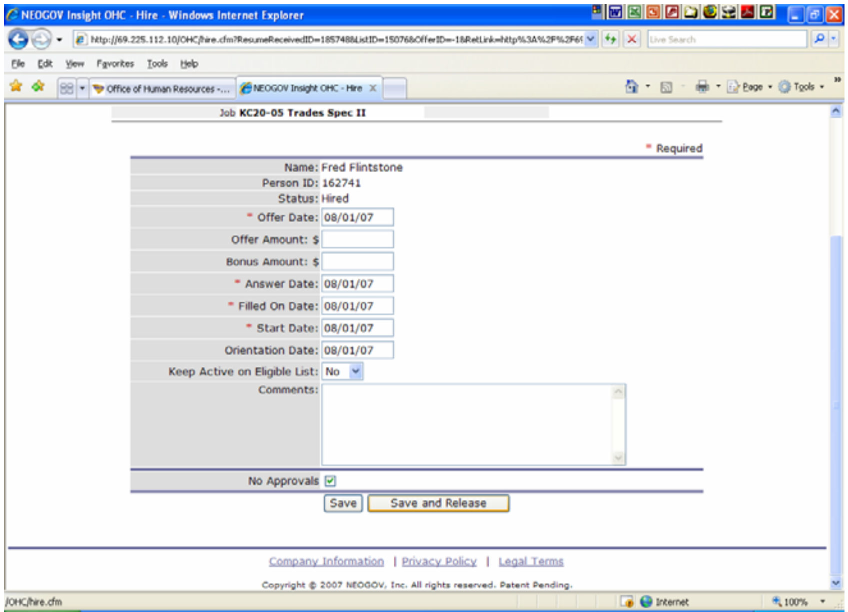
24. The 'Referred Candidates' screen is displayed

25. Choose 'Hire' from the 'Action' dropdown



26. Click the 'Go' button

27. The 'Hire' screen is displayed



28. Fill in the 'Hire' information as necessary [NOTE: The Comments section should be utilized carefully since the information may be subject to disclosure under the Freedom of Information Act (FOIA).]

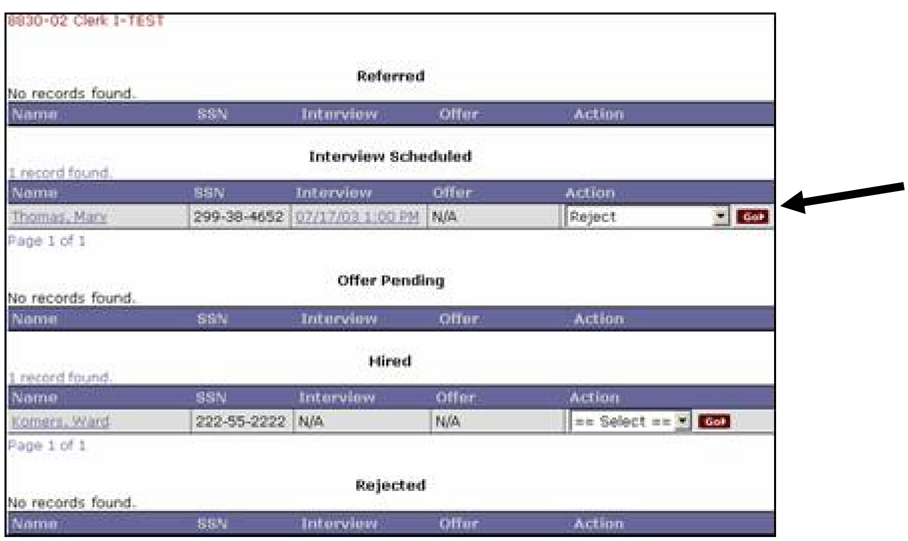
29. Click on 'Save and Release' button at the bottom of the screen (the applicant is marked as hired and is now displayed in the 'Hired' section and HR now has a 'Hire Awaiting Authorization'.)

Mark an Applicant as Rejected (as a Hiring Manager/Supervisor)

30. Click on the 'View Candidates' link for the appropriate recruitment

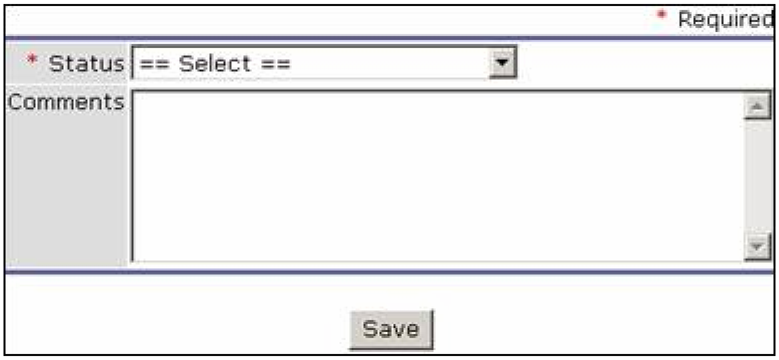
31. The 'Referred Candidates' screen is displayed

32. Choose 'Reject' from the 'Action' dropdown

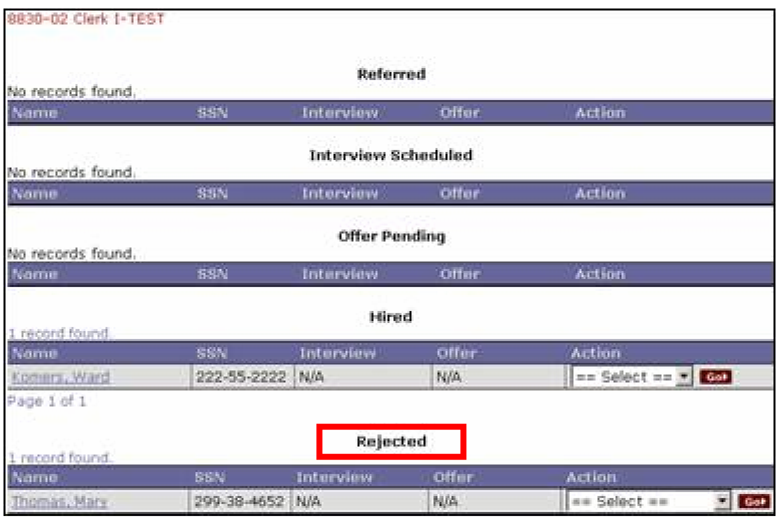


33. Click the ‘Go’ icon
34. The ‘Reject’ screen is displayed
35. Complete the ‘Reject Candidate’ information

- **Status** – Rejection reason (disposition)
- **Comments** – Rejection comments



36. Click the ‘Save’ button
37. The applicant record is moved to the ‘Rejected’ section



APPROVER ROLE

- **Approver** – An agency user who can approve or deny requisitions or hires that have been routed to him/her for approval.

- Agencies must train OHC users on the specific routing approval processes within their agency.

- For agencies that utilize an internal approval process before creating a new requisition or before authorizing a new hire, this role may be utilized in the OHC. If this role will be utilized, agencies need to first identify the required approvers. Next, the approvers will need to be setup in the NEOGOV system and the approvers will need training on their role in the requisition lifecycle.

- There are two routing options when sending a requisition or a hire through the process for approval.

    - **Must approve before next approval** – Requisition will not be routed to 'Approval 2' until approved by 'Approval 1'.

    NOTE: If an agency selects two individuals for the same approval level, either person may approve the requisition or hire.

    - **Final approval** – Denotes the final approval before the requisition is sent to HR

<u>Approve/Deny a Requisition</u>

1. Log into the Online Hiring Center (OHC) [Department User must be an Approver]
2. The OHC is displayed
3. Click on the 'My Approvals' link
4. The 'My Approvals' screen is displayed, depicting requisitions organized into the following groups:

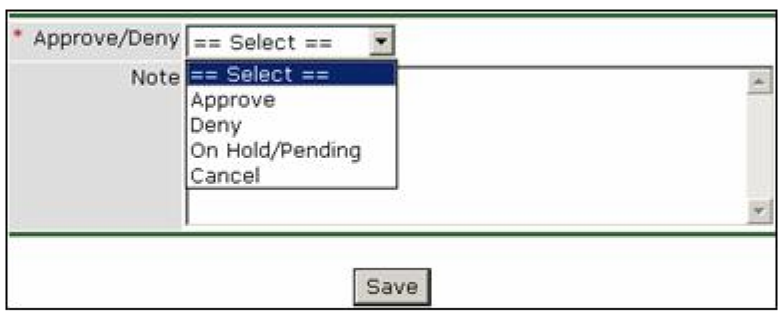
- Pending approval – Requisitions not yet approved/denied
- Approved – Requisitions that have been marked as 'Approved'
- Denied – Requisitions that have been marked as 'Denied'

5. Click on the ‘Approve/Deny’ link associated with the requisition

6. The ‘Approve Requisition’ screen is displayed

7. Select the appropriate ‘Approve/Deny’ action from the dropdown

- Approve – Approve requisition and automatically route to the next approval level (if applicable)
- Deny – Deny the requisition and automatically route requisition back to the liaison
- On Hold/Pending – Mark requisition as on hold or pending. Requisition will remain in the approver’s ‘My Approval’ step until they edit the requisition and modify the ‘Approve/Deny’ action
- Cancel – Cancel the requisition and automatically route back to liaison



8. Enter any notes/comments

9. Click on the ‘Save’ button

NOTE: An automatic email is generated once an action is taken. To view the requisition history, click on the ‘Show Approval Detail’ or ‘History’ link on the ‘My Requisition’ screen.

Approve/Deny a Hire

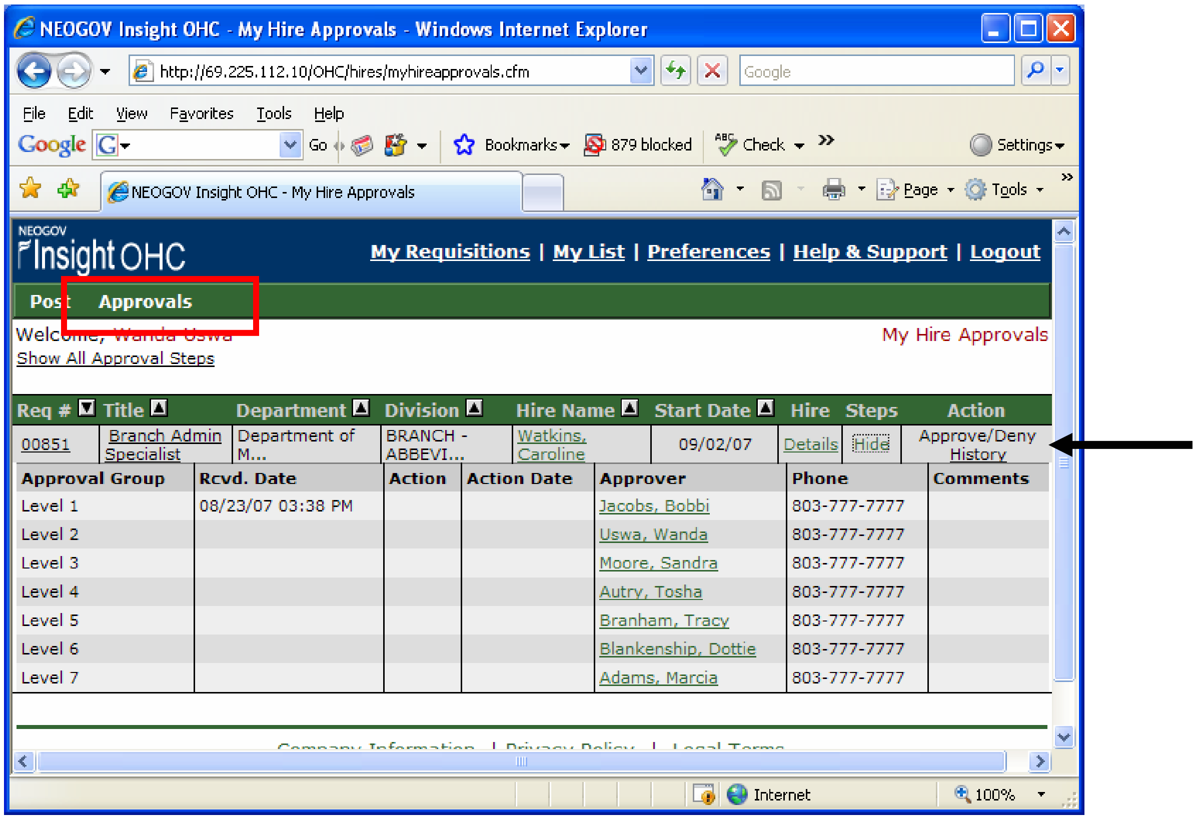
10. Log into the Online Hiring Center (OHC) [Department User must be an Approver]
    The OHC is displayed

11. Click on the ‘My Approvals’ link

12. Select Hires from drop down list

13. Click on details link under Hire column to see details of candidate

14. Click on show link to show approval history for candidate



15. Click on Approve/Deny to take action on candidate
16. To Approve the hire, click the Save button
17. If Deny the hire, you must select who to return the candidate to
18. Click the “Save” Button