Insight Enterprise

Recruitment Life-Cycle Overview

State of North Carolina
Fall 2011
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Recruitment Life Cycle Overview

RECRUITMENT LIFE CYCLE

Insight – HR Users
REQ is Opened/ Assigned
Exam Plan Creation
Posting Creation
Evaluation Step Creation
Applications Processed
Eligible List Creation
Referred to Hiring Manager
REQ Filled

Applicants Search Jobs
Applicants Apply

OHc - Departments
REQ is Created/ Approved
SME Review

Referred Candidates: Interviewed/ Offered/ Hired/ Rejected

Job Applicants

NEOGOV Insight
Insight - Human Resources
HR

Online Hiring Center - Departments
D1
D2
D3
D4

HR USERS
Analyst/Recruiter, System Admin.

DEPARTMENTS
Liaison, Approver, SME, Hiring Manager
## Recruitment Life Cycle Overview

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Insight Roles

**INSIGHT/RECRUITER ROLES** ([www.training.ca.gov.com](http://www.training.ca.gov.com))
When logged in, you **WILL** see dropdown menus at the top of the screen.

- Analyst/Recruiter – Works in HR, facilitates recruitments, screens applications, schedules exams, sends notices, creates eligible list, distributes referral (certified) lists

**ONLINE HIRING CENTER ROLES** ([www.training.ca.gov.com](http://www.training.ca.gov.com))
When logged in, you **WILL NOT** see any dropdown menus at the top of the screen.

- **Liaison** – Creates requisitions in departments
- **Approver** – Approves requisitions in departments before requisitions reach HR
- **SME** – Subject Matter Expert who reviews applications for training and experience in departments
- **Hiring Manager** – Receives electronic eligible lists (certified lists) in departments

**APPLICANT ROLE** ([http://www.training.governmentjobs.com](http://www.training.governmentjobs.com))
**OR**

Your agency’s webpage: ([http://agency.training.governmentjobs.com/agencyname](http://agency.training.governmentjobs.com/agencyname)) (You can access that link through the ‘My Links’ page (the link next to ‘My HR’), and clicking on ‘Job Opportunities Page’)

Write your username and password here: ___________________ / ___________________

- **Applicant** – Creates applications, applies online
Create a Requisition (As a Department Liaison)

1. Go to: www.training.neogov.com
2. Click the Login link in the upper right corner.
3. Enter your Department Username and Password.
4. Select the Online Hiring Center - Departments radio button and then click login. This will take you to the Online Hiring Center (OHC) where all non-HR department users will log in.

5. Click Open New Requisition.

6. Search for a class specification for which you want to create the requisition.
7. Click Create New in the Requisition column (the far right column).

8. Fill in the requisition form:
   a. Desired Start Date – Optional field used to specify the ‘desired’ start date, or could be used as a field to specify when requisition is completed (although this information is already tracked by the system).
   b. Requisition # - Generally, this # is automatically assigned by the system, unless it otherwise configured by the HR system admin to be a text box for user entry.
   c. Working Title – Enter a 'working title' to be used for posting, especially if different from Class Title.
   d. Vacancies – At implementation, we are focusing on a 1-1 relationship between the vacant position and the requisition. So, the value would be 1.
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

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

   - 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 vacant positions within the selected Department/Division. The list will not be filtered by job classification.

(ii) Selecting a position ID via ‘Search’ Selection (ii):

   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:

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 – Optional field. Select a list ‘type’ option. We will use “regular”.

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

10. Click on ‘Save and Release’

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

12. Click the **Logout** link in the upper right corner.
**Assign a Requisition, Create an Exam Plan (As an Analyst/Recruiter)**

13. Enter your **Analyst/Recruiter** Username and Password

14. From the main navigation bar, go to Requisitions > **Approved**

15. Click the **Authorize** link next to the requisition on which you are working

   - Change the Status to **Open**.
   - Select your own name from the Analyst dropdown.
   - Do not change the Existing Exam (Recruiting) Plan dropdown.
   - Click **Save**.

16. Click the **My HR** link in the upper right corner.

   - Note: The requisition will display in the **Open Requisitions** section at the bottom of the page. If your requisition did not show up, go back to Requisitions > Approved. If your requisition is there, then you need to authorize the requisition again. Click the **Authorize** link and be user to set the Status field to **Open**.
17. Click the **Create Exam (Recruiting)** link next to your requisition.

![Create Exam (Recruiting) link](image)

18. Enter values for all applicable fields on the create exam (recruitment) plan page and then click **Save**.

![Create Exam Plan](image)

**Create Job Posting (As an Analyst/Recruiter)**

19. Click the **Add New** link from the Job Posting section.

![Job Posting Add New](image)

20. Note the check boxes at the top & Complete the job posting form:
   a. For **Job List**, select the **Default Job Listing**.
   b. **Advertise From** date: fill in the date you would like the job to automatically post (during Insight training, do not change the date - we want the job to be open as of today so it is posted when we go to apply later on).
   c. **Advertise To** date: fill in the date would like the job to be automatically removed from
your webpage (this is the closing date).

d. **Class Spec Title** populated from the Class Spec.

e. For **Job Title (Working Title)** and **Job Number**, auto-populated values provided by the originating requisition. The Job Title is auto-populated but can be edited.

f. **Exam (Recruiting) Plan**: automatically connected to the Exam Plan from which the job posting is created (but not always the case).

g. Select a **Job Type (Appointment Type)** from the list.

h. Select at least one **Category**. Highlight the category by clicking it and then click the **Add** button to associate that category with the posting. Applicants will be able to search for job openings by categories.

i. For **Department**, select from dropdown.

j. Select a **Location On Job** (County Job Located).

k. Select a **Search Locations**, can be more than one county if wanting to market in adjacent counties or regionally (for job search functionality).

l. Use the State of NC Job Template selection for the **Application Template** (For AOC, please select the AOC Template).

m. Leave the default setting for the **Reapply Period (days)**.

n. **Assigned To** the job posting to you for training.

o. **Description of Work**, populate using the text editing capabilities.

p. **Knowledge, Skills and Abilities/Competencies**, populate using the text editing capabilities.

q. **Minimum E&E Requirements**, select Populate From Class Spec to auto-populate.

r. **Supplemental & Contact Information** populated using the text editing capabilities.

s. **Division/Section**, enter your agency defined division, section, or combination for marketing job posting.

t. **Work Location**, enter your user defined detailed location (ie. Raleigh, NC or 301 North Wilmington Street, Raleigh, NC, etc.).

u. **Position Number**, number will need to be entered (can cut and paste from requisition).

v. **Recruitment Range**, please enter the hiring range.

w. Complete the **Salary Grade Equivalent**.

x. Select **Competency Level** from the dropdown.

y. Select the **SOC Category** from the dropdown.

z. Complete the **Salary** information section, auto-populates from the Class Spec.
aa. Enter **Internal** Notes (optional).

bb. If needed, select the **Yes** Supplemental Questions radio option (at the bottom of the page).

c. Click **Save** button.

**Sample NC Job Posting Form – next page**
Revenue Field Auditor I - 01

Advertise From: October 13 2011
Advertise To: October 36 2011 5 pm 90

* Job Class Title: Revenue Field Auditor I
* Job Title: Revenue Field Auditor I
Job Number: 
Exam (Recruiting) Plan: Add New
* Job Type: Permanent Full-Time
* Category: Selected
   Accounting and Finance
   Administration
   Administrative Assistant
   Agriculture
   Architecture
   Attorney
   Audit
* Department: Dept of Revenue
* Location On Job: Wake County
* Search Locations: Unselected
   Alamance
   Alexander
   Alleghany
   Anson
   Chatham
   Durham
   Granville
   Harnett
   Orange
* Application Template: State of North Carolina Job Application
* Reapply Period (Days): 1
* Assigned To: Floyd Lyman

Description of Work:
Ensure compliance with North Carolina Revenue laws by employing professional auditing principles and practices in examination of taxpayers accounting records and tax reports. Will work with Senior Auditors in conducting field auditing work for all tax schedules with emphasis on corporate income, franchise and sales and use tax of businesses located within the state.

Knowledge, Skills and Abilities / Competencies:
- Knowledge of auditing and accounting theories and principles.
- Ability to perform audits through application of tax laws and rules, utilizing accounting theory and auditing analysis.
- Ability to justify and defend audit findings.
- Ability to communicate audit information, both orally and written, to business officials and colleagues.
Minimum Education and Experience Requirements:

Graduation from a four-year college/university with a degree in Business Administration, Accounting, or related field with at least eighteen semester hours of accounting and thirty months experience as a Revenue Field Auditor Trainee or the equivalent, or an equivalent combination of training and experience.

Minimum Training & Experience for a Trainee Appointment: Graduation from a four-

Supplemental and Contact Information:

Management prefers a candidate with a CPA certificate (or working towards a CPA certificate).

** This opportunity requires some overnight travel each month. A state car is available for use. **

For more information, click here: http://www.dormc.com/

If bilingual, which language is desired? None

Division/Section: Field Audit - Corporate

Work Location: Raleigh

* Position Number: 60081893

Recruitment Range: $46,635 - $50,000

* Salary Grade / Salary Grade Equivalent: 73

* Competency Level: Contributing

* SOC Category/Subcategory: Mgmt Rel-Finance Specialists

Salary Information

Auto-Update: Automatically update salary range information from Class Specification.

* Minimum Salary: 46,635.00

Maximum Salary: 77,277.00

* Per: Based on 2080.00 hours per year


Salary Display: Check this box to show salary as Monthly

Internal Notes (optional):
Optional: Supplemental Questions

21. **Job Specific** supplemental questions are questions, specific to a particular position, that you would like to ask in addition to the standard Statewide application questions. Usually, these questions ask about a person’s qualifications for the position and will help you screen applications efficiently [with added benefits such as automatically screening applications (auto-scoring), reporting on the SQ responses, and filtering candidates based on responses].

   **Note:** We are not deploying all this functionality upon initial implementation. These questions can only be added as part of a job posting (when it is being created), usually via the supplemental question item bank. These questions are specific to each job and will only display online with the job posting to which they are associated. (They will also appear on the printed Job Bulletin for the job posting to which they are associated as well.) Click the Item Bank link in the upper right corner.

22. Click the **Add New** Item link.

23. Complete the supplemental question form. All fields with a red asterisks are required, including internal codes for response options, which are used for reporting purposes.
24. Click **Save**. You are now at the list of available supplemental questions in the item bank.

25. Click the **Add** link under the column labeled **Basket** for the questions you wish to associate to your job posting.

26. Once you have finished adding questions, click the **Checkout** link in the upper right corner; your selected questions will appear.

27. Click the **My HR** link in the upper right corner to verify successful creation of your job posting; it will appear in the Draft Postings section on the **My HR** page.

- Note: Your job posting does not display in the Active Postings section, because the **Draft** checkbox is selected by default or if the advertising dates are in the future. Find
the posting on the page and click the Edit link. Make the necessary changes and save the posting. Repeat this process until it appears in the Active postings section on the My HR page.

You have completed adding the job posting and supplemental questions, now it is time to apply for the position.

**Apply for the position online**

**(As an Applicant)**

28. Navigate to My Links or Log in to:  
http://agency.training.governmentjobs.com/northcarolina/default.cfm

29. Click the job posting title.

30. Click the Apply link.

**Create an Application (As an Applicant)**

31. Click create an account link or the Create Your Account Here! link
Enter your new account information (you MUST remember this information).

- Write your username and password here: __________________________/________________________

32. Click Save.

33. A page is displayed with your login information. Click Login.

34. Enter your username and password and click Login.

35. Click Create Application.
36. Enter a title for your application – consider using your first and last name.

37. Click **Create Application**.

38. Complete the Personal Profile information.

39. Click **Save & View Application**.
40. Complete at least one record in the Education History and Work Experience sections (click **Save** at the bottom of each section).

41. Complete the agency-wide supplemental questions.
42. Click **Save & Proceed** at the bottom of the page.

43. Complete the job-specific supplemental questions (if any).

44. Click **Save & Proceed** at the bottom of the page.

45. Verify every section of the application on review page & click **Confirm Application**

46. Click **Accept** on the digital signature page.

47. Watch for the Confirmation page and check for the email (email is not sent in training)

48. Apply for each other’s job postings online. You will need at least **four** applications to complete this exercise.

49. Click the **Logout** link in the upper right corner or stay logged in to see the status view
Input a paper application (As an Analyst/Recruiter)

50. Go to: www.training.neogov.com
51. Click the Login link in the upper right corner.
52. Enter your Analyst/Recruiter Username and Password.
53. From the main navigation bar, go to CandidateTrack > Multiple App Entry.

54. Search for the applicant by name

55. Select an existing applicant or choose New Applicant

56. Select the job for which to apply & click on Submit
57. Complete the required fields on the application entry form and click Save.

58. Fill out the agency-wide supplemental questions and click Save.

59. Fill out the job-specific supplemental questions and click Save.

60. Since we are in training and do not have a sample file attachment of a scanned paper application, click Save & Exit App Entry.

61. Click the My HR link.
62. Click the **Add Step** link from the Evaluation Steps section.

63. Select **Supplemental Questionnaire** from the Step Type dropdown.

64. Enter the **name for this step** in the Step Name field: Min E&E + KSA/Competency Evaluation (Qualified)

65. Enter a message displayed to online applicants in the **Display-Candidate Status As** field, (we suggest “under review”).

66. Select the **Pass/Fail** radio button. Note: The Scored option will not work for the Supplemental Questionnaire step type unless a Scoring Plan has been created. This is functionality that we are currently not implementing.

67. Enter an option for Applicant Status.

68. Click **Save**.
69. From the Exam Plan Detail page, in the Evaluation Steps section, click the Add Step link again to add your next evaluation step.

70. Select Other from the Step Type dropdown.

71. Enter the name for this step in the Step Name field: Most Qualified.

72. Enter a message displayed to online applicants in the Display Candidate Status As field (we suggest “under review”).

73. ‘Evaluate On’ option:
   a. Select the Pass/Fail radio button so each applicant will be given a “pass” or “fail” assessment.

74. Enter an option for Applicant Status.

75. Once evaluated on a ‘Pass/Fail’ basis – option (a) above, no further information is needed – click on ‘Save’.

OR

NOT TO BE USED FOR RELEASE 1

76. If the step is evaluated on a ‘Scored’ basis – if applications are to be reviewed and scored (given a raw score) by a single or multiple SMEs enter information for the following:
   a. Training and Experience Details field – select the desired option for final score calculation (i.e. how the SME scores for each applicant are to be calculated), an ‘Average’ of scores, the ‘Median’ score, or a ‘Sum’ of scores.
   b. Select Percentage Score for Calculate Final Scored Based on.
   c. Enter 0 for Final Score Weight for this step to determine each candidate’s weighted final score.
   d. Enter 75 as the Passing Score Percentage.
   e. Enter 100 for the Max Raw Score.
   f. Enter a desired name for this step in the Score Label field, e.g., SME Rating.
   g. Click on the name of the desired SME (for training purposes select your name) from among the Unassigned SMEs link.
h. If there are multiple SMEs, click on 'Add Score Field' and repeat steps (f – g) for each SME desired.

i. Click **Save**.
Move Applicants Through Evaluation Steps/Screen (As an Analyst/Recruiter)

77. From the My HR page, in the ‘Active Postings’ section, click the appropriate exam number (under the Exam column).

78. Click Step 1 Application Received link.

79. Under Step 1, select Change Disposition from the Select Action dropdown.

80. Select All from the Select Candidate(s) dropdown.

81. Click Go.

82. Select the Passed radio option

83. Click Save.

84. Select Advance to Next Step from the Select Action dropdown.

85. Select Passing from the Select Candidate(s) dropdown.

86. Click Go.

87. Click the ‘+’ next to Step 2, click the candidate name link for the first applicant in the list; their application record will display.
88. Click the **Show Candidate Disposition** link in the upper right corner.

89. Update the dispositions as follows:

   - Fail the first applicant by setting the disposition to **Failed** and select **Does Not Meet Minimum Qualifications** from the Reject Reason dropdown.
   - Click **Save & View Next App**.
   - Pass the remaining applicants by setting the dispositions to **Passed** and then click **Save & View Next App**. At last applicant, click **Save**.

90. When you have finished updating dispositions and saving, click the **View Applicants By Step** link at the top of the page. Notice the passing and failing dispositions.

91. Select **Advance to Next Step** from the Select Action dropdown.

92. Select **Passing** from the Select Candidate(s) dropdown.

93. Click **Go**.

**Assign Applicants to Subject Matter Experts (SMEs) for Review (Optional)**

94. From the My HR page, in the ‘Job Postings’ section, click the appropriate exam number (under the Exam column).

95. Click the **View Applicants By Step** link.

96. Click the ‘+’ next to **Step 3**, under Step 3, select **SME Review** from the Select Action dropdown.
97. Select All from the Select Candidate(s) dropdown.
98. Click Go.

99. Select the appropriate SMEs from the drop down list (choose your own name). To pick more than one SME, click the first SME, hold down the Ctrl-key and click the next SME.
100. Click Submit.

101. Note the SME column with the dot indicator
102. Click the Logout link in the upper right corner

(Switch Role)

Review Applicants as a Subject Matter Expert (SME)

103. Login using your Department Username and Password.
104. Click the My SME Review link.

105. Click the job title of your exam plan.

106. Click the candidate’s name to view their application record
107. Click **Show Candidate Disposition**

108. A ‘pass/fail’ determination is necessary for each candidate, select either pass or fail.

109. Click **Save & View Next App.**

110. Click **My SME Review** in the top right of the page.

111. Click the job title of your exam plan.

112. Note that the pass/fail determination is displayed.

113. Click the **Logout** link in the upper right corner

**Switch Role**

**View/Review SME Evaluation (As an Analyst/Recruiter)**

114. Enter your Analyst/Recruiter Username and Password

115. From the **My HR** page, in the Open Requisitions section or Job Posting section, click the appropriate exam number (under the Exam column)

116. Click the **Step 3 Most Qualified** link

117. View the pass/fail status of each applicant

**Still as Analyst/Recruiter, Placing Applicants on the Eligible List (Most Qualified)**
118. From the view applicants by step page, place a check in the box next to two of the applicants (in the next session, you will refer the rest of the candidates)

119. Select **Place on Eligible List** from the Select Action list

120. Select **Selected** from the Select Candidate(s) list

121. Click **Go**

122. Click **Assign To List**

123. Click the **Eligible List** link on the View Applicants by Step page

124. Click the **Default List** link on the Eligible List page (you will now view the eligible list)

As an Analyst/Recruiter, Refer Applicants to the Hiring Managers **(Referred List-MQ Pool)**

125. Select **Refer** from the Select Action list

126. Select **All Candidates** from the Select Candidate(s) list

127. Select **Requisition** from the list

128. Click **Go**
129. Enter any comments for the hiring manager(s)
130. Click Refer; the action refers the chosen applicants electronically to the Hiring Manager(s)
131. View the Referred Lists screen

132. Click the Logout link in the upper right corner

(Switch Role)

View Referred Candidates (MQ Pool) - Mark as Hired (As a Department Hiring Manager)

133. Login using your Department Username and Password.
134. Click the My List link in the upper right corner. This will display all referred lists for this Hiring Manager.

135. Click the View link in the Candidates column for the applicable requisition.

Schedule Referred Candidates for Interview and Hire (as a Hiring Manager/Liaison)

136. Choose Schedule Interview from the Action list under the Referred candidates (Please note; this does not actually schedule interviews; rather, is a mechanism to identify those applicants to be interviewed.)

137. Complete the required fields in the interview schedule information. Most details contained in the form may be used in a notice if configured
138. Click Save
Making a ‘Hire’ – (Identifying Recommended Candidate for Approval)

139. In the ‘Action’ dropdown next to the candidate you would like to “hire,” place a check next to the applicant. Select ‘Hire’ from the ‘Action’ dropdown, click on ‘Go’.

140. Update appropriate date fields and enter comments.

   a. 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.
141. Click on “No Approvals” or & define the approval chain.

| No Approvals | Tordella, Jean
| Development | Barnett, Kevin
| Tordella, Paul | Prick, Margaret
| Approval 2 | Education & Training
| Tordella, Jean | Barnett, Kevin
| Tordella, Paul | Prick, Margaret
| Approval 3 | Select
| Approval 4 | Select
| Approval 5 | Select

142. Click on ‘Save and Release’ button at the bottom of the screen (the applicant is marked as hired and moved to the ‘Hired’ section)

<table>
<thead>
<tr>
<th>Hired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Barnett, Kevin</td>
</tr>
</tbody>
</table>

143. Rejecting Candidates

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’.

<table>
<thead>
<tr>
<th>Offer Pending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Tordella, Jean</td>
</tr>
</tbody>
</table>

144. Select a ‘Reason’ and add any relevant comments

145. Click on ‘Save’

146. The Applicant is marked as “rejected” and moved to the ‘Rejected’ section.
147. Click the **Logout** link in the upper right corner.

### (Switch Role)

#### Authorize a Hire
**(As an Analyst/Recruiter)**

148. Enter your **Analyst/Recruiter Username and Password**

149. From the **My HR page**, scroll down to the bottom of the page, to the **Hires Awaiting Authorization** Section

150. Click the **Hire Name**

151. Click **Edit**; note the **Approval Status**

152. If necessary, update any of the field values.
153. Click **Save and Authorize** when you are ready to authorize the hire.

![Image of Personnel Action Form]

154. Notice the new Approval Status and review the printable version of the Personnel Action Form.

![Image of Personnel Action Form]

155. Now click **View Referred Candidates** to return to the Referred List.

![Image of Referred Candidates]

156. View the new **Status** for each candidate.

157. Click **Show status Details** to view details from OHC Referral.

![Image of Status Details]
Give us your feedback!
Please take our survey to help us continually improve our training courses.

Go to:

http://www.surveymonkey.com/s/5T3GLWB

THANK YOU!
Filters allow users to specify criteria and receive a listing of applicants who meet the specified criteria. Criteria used for filtering can consist of basic filter criteria from the standard application questions; agency-wide questions, job specific supplemental questions, application received date, online/paper application, notification preference, or score.

Some examples of how filters that you might want to create include:

- Applicants who speak Spanish
- Applicants who are willing to work nights and weekends
- Applicants who are willing to work at a specific facility or geographical region
- Applicants who applied during a specified time frame
- Applicants who scored between 60% – 70% on the written exam

Filter Applicants in the Exam Plan - Evaluation Steps

Basic filtering:

The ‘Filter Applicants by Step’ link allows users to retrieve a list of all applications for a specific evaluation step. This feature allows you to perform the same functions as you would on the ‘View Applicants by Step” page, but with the efficiency of working with just the applicants within a specific step. You can quickly navigate from one step to another within the filtering page.

The 'Filter Applicants by Step' page can be accessed in any of the following ways:

a. from the Exam Plan, by clicking the 'Filter' link next to the Add/Delete links for each evaluation step;

b. by clicking the ‘Filter by Applicants by Step’ link at the top of the View Applicants by Step page
c. by selecting the ‘Filter’ option from the Select Action drop down list on the View Applicants by Step page.

The ‘Filter Applicants by Step’ page will appear.

1. From the Evaluation Step dropdown, select the appropriate step.
2. Under ‘Show Applicants’ select the type of applicants you wish to view.
3. Select the appropriate Candidate Status.
4. Select the appropriate field to ‘Search By’ name, or person ID, and complete the Search Text box with the specific information.
5. If searching by date range, complete the information in the ‘From’ and ‘To’ fields.
6. Press ‘Filter’.
7. The filtered list will appear. From the dropdown menu, select an appropriate action and click ‘Submit’
Advanced Filter:

How Do Evaluation Step Advanced Filters Work?

Advanced Filters for evaluation steps and eligible lists allow users to specify criteria and receive a listing of applicants within the evaluation step or on the eligible list who meet the specified criteria. Advanced Filters goes beyond search elements of basic application information, Agency-Wide Question responses and Job-Specific Supplemental Question responses. To add to this list, filters can be created using Applicant Master Profile and Applicant Step data.

Advanced filters on evaluation steps and eligible lists can be saved and used again with the exam plan from which they were created. In addition, these filters can be shared with other users within any exam plans they are applicable to.

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

A. Evaluation Step Filters

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

Search elements for Evaluation Step Filters include:

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

Add and Apply an Evaluation Step Filter

You have one of two paths to add an Evaluation Step Filter:

Option 1: from the View Applicants by Step page (while you're working with the candidate records),
OR from the Exam Plan Detail page (the main page for your Exam Plan record).

Both paths lead to the final outcome of creating a new Evaluation Step Filter.

When you create an Evaluation Step filter from the View Applicants by Step page, you’re likely in the midst of working with the candidate records and need to perform some type of search function.

1. From the Exam Plan Detail page, click ‘View Applicants by Step’ and expand an Evaluation Step that contains application records that require some type of filtering.
2. From the Select Action drop-down field, select ‘Advanced Filter’.
3. From the Select Candidate(s) drop-down field, select the applicable candidate value base your filter upon (e.g., ‘All’).
4. Click ‘Go’.
5. Click ‘Add Filter’.
6. Input a descriptive name into the Name field.
7. Select whether or not you wish to share your filter. (Remember, sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans that they are applicable to.)
   a. Note: You'll likely return back and select Share Filter once you have determined that your filter is properly constructed.
8. Input your first search criteria in the condition line:
   - **Object**: This is from where the data will be pulled. Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions.
   - **Field**: select the field on which you're basing your search condition. You will see applicable fields depending on which ‘Object’ you have selected.
   - **Operator**: select the function that yield the records that you're expecting to see.
     o Quick tips: For exact matches, select ‘Equal’. For less exact matches, use the Contains operator (e.g., the Work Type field contains Full Time and/or Part Time values).
     o Operator options are as follows:
       - Contains (IN) – Where value is found in result
       - Does Not Contain (Not IN) – Where value specified is not included in result
       - Equal (=) – Where result is an exact match
       - Equal Field (=) - Not in use at this time
       - Not Equal (<>) – Where value is not found in result
       - Not Equal Field (<>) – Not in use at this time
   - **Value**: input the field value for which you're basing your search.
9. If your filter only contains one search condition, you're free to click ‘Save’; however, if you would like to refine your search, add additional condition lines by click ‘Add Condition’.
10. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.
11. If your filter is advanced and requires combining AND and OR condition lines, then click ‘Add Group’.
12. Once you have completed your entire filter statement, click ‘Save’.
Additional Documentation - Filtering

13. Upon saving you’re returned back to the page allowing you to apply, or execute your Evaluation Step filter; click ‘Apply’.
14. Your Evaluation Step will display, THIS STEP IS FILTERED.

After your application records are filtered, you're free to carry on with other tasks, e.g., change Disposition values, send notices, etc.

Below are a few filter examples to give you a better understanding of how to construct your own filter statements.

Filter Example 1 - Applicants who are between 18-20 years old.

Filter Example 2 - Applicants who are between 18-20 years old AND speak Spanish.
Filter Example 3 - Applicants who are between the ages of 21-39 AND have never been convicted of a felony, AND have requested to take a written exam at the North County Sheriff Station OR the South County Sheriff Station.

Option 2: The second path that can be taken to create an Evaluation Step filter is from a directly from the Exam Plan Detail page. When you create an Evaluation Step filter from the Exam Plan Detail page, you're "planning ahead," creating a filter that will be used at a later time. The act of applying, or executing, the filter can only be done from the View Applicant by Step page.

- From the Exam Plan Detail page, Advanced Filters section, click ‘Add Evaluation Step Filter’. You can also share or un-share your filters from this section.

- From here to the point of saving your Evaluation Step filter, it is the same process as described in Option 1 above.
- Shared filters can be viewed by clicking the ‘View’ link.
Eligible List Filters

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

Search elements for Eligible List Filters include:

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

Add and Apply an Eligible List Filter

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

Option 1:

1. From the Exam Plan Detail page, Eligible Lists section, click ‘View Candidates’ for an eligible list containing candidate records that require some type of filtering.
2. From the Select Action drop-down field, select ‘Advanced Filter’.
3. From the Select Candidate(s) drop-down field, select the applicable candidate value base your filter upon (e.g., All Candidates).
4. From here to the point of saving your Eligible List filter, it is the same process!
5. Upon saving you’re returned back to the page allowing you to apply, or execute your Eligible List filter; click ‘Apply’.
6. Your Eligible Candidates page will display, Filter returned X records.

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

Option 2:

The second path that can be taken to create an Eligible List filter is from directly from the Exam Plan Detail page.
From the Exam Plan Detail page, Advanced Filters section, click ‘Add Eligible List Filter’.

From here to the point of saving your Eligible List filter, it is the same process!

Note that you can only apply your saved Eligible List filter from the Eligible Candidates page.

Once you have saved your Eligible List filters, they display under the Advanced Filters section on the Exam Plan Detail page. The Filter Type column will indicate whether it is an Evaluation Step Filter or Eligible List Filter.