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NEOGOV INSIGHT

Training Module Guide

Modified to meet the State of Idaho’s hiring process

 Revised May 2021

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Training Module Guide

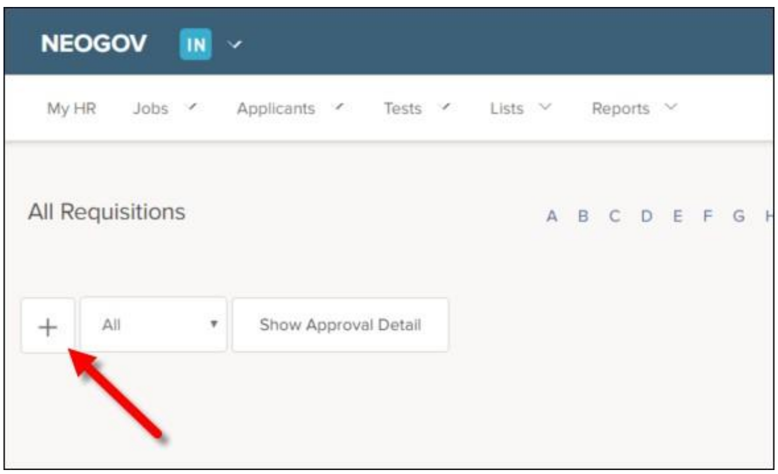
Introduction

Welcome to new user training for Insight. This training guide has been modified to meet the State of Idaho's needs.

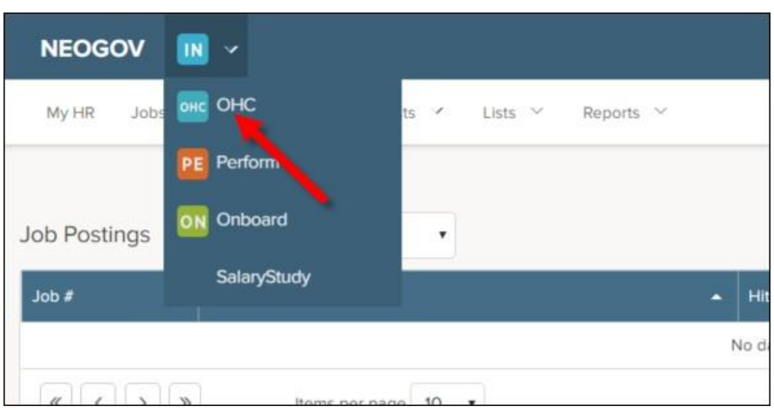
Module 1: Create a Requisition

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

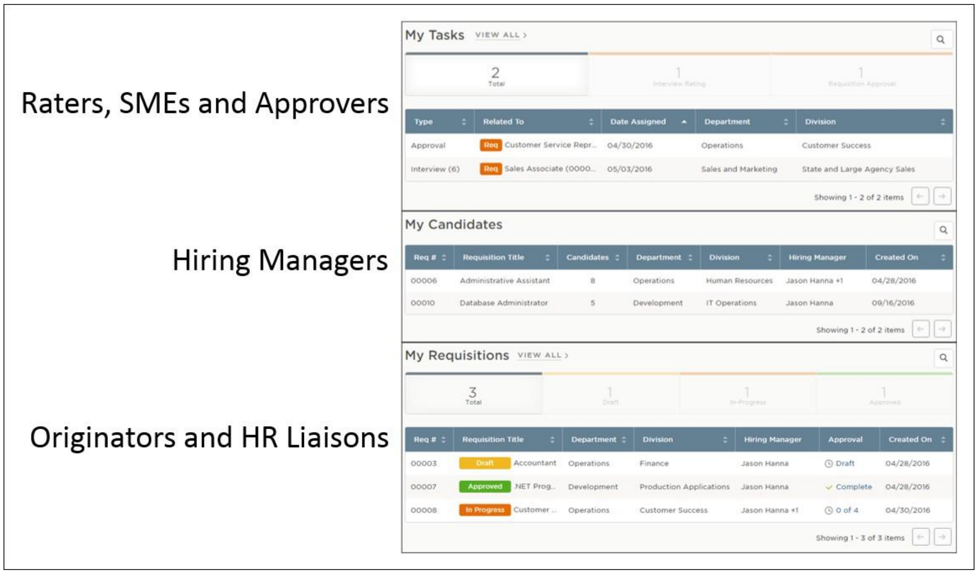
Note: Insight users given permission to add requisitions may do so on behalf of the hiring department. On the Jobs menu, click Requisitions and then click the Add New button [+]. This will be the typical procedure for most Insight users.



For this training module, you will impersonate the role of the hiring department user and create the requisition from the OHC. This will give you a real-world perspective; from your hiring departments' vantage point. On the NEOGOV Product menu, click OHC.

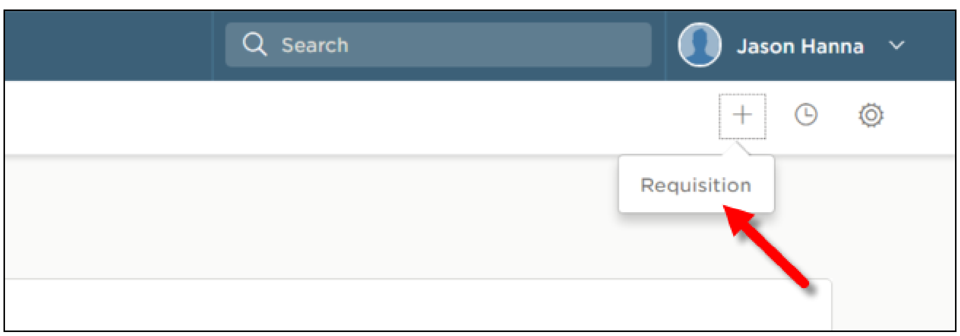


The six major OHC roles of Originator, HR Liaison, Hiring Manager, Rater, SME (Subject Matter Expert) and Approver have access to various sections on the OHC dashboard. You should be assigned the OHC user role of Originator or HR Liaison. With either of these assigned OHC roles, the My Requisition section will display.

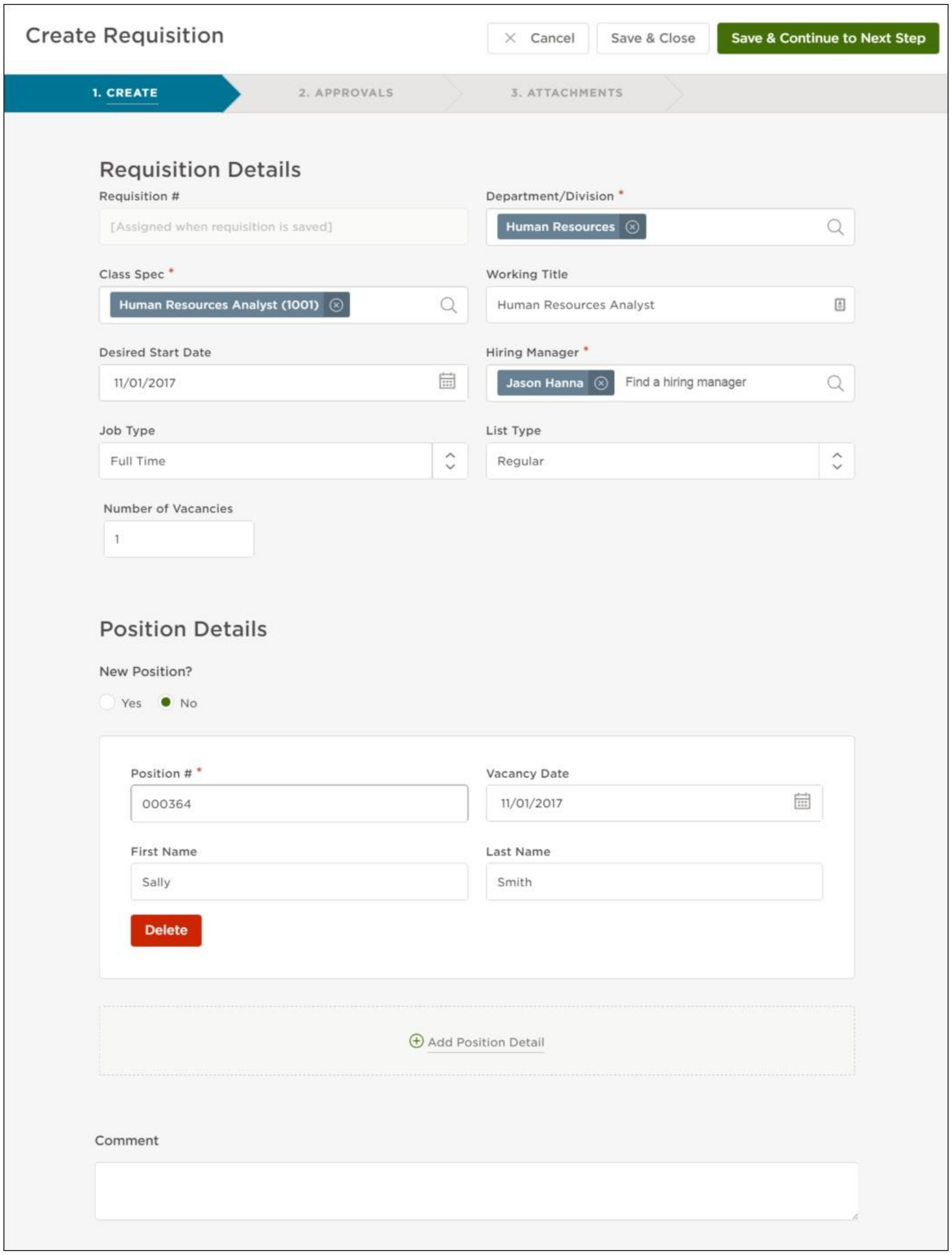


Steps to Create a Requisition

1. On the Add New [+] menu, click Requisition.



2. The requisition form will display.

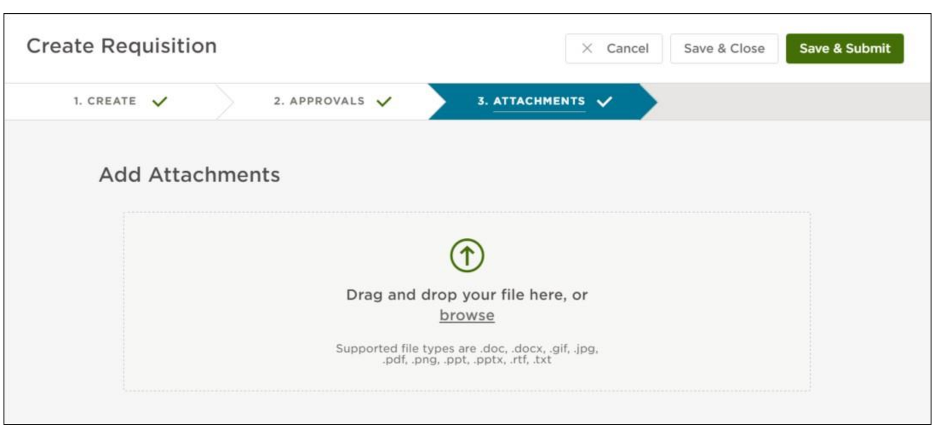


3. Complete the form using the table below.

* Required by DHR and NEOGOV

Field	What to Enter
* Requisition #	Your Insight Administrator has auto-numbering enabled for this field. Nothing is required; a number will be automatically assigned once you create the requisition.
* Department/Division	Select the department/division if applicable.
* Class Spec	Select the class spec.
Working Title	Enter the working title for this job. This can be the same name as the class title.
Desired Start Date	Enter the desired start date of the hired candidate. If you're not certain of the date, today's date is commonly used.
* Hiring Manager	Select your name as the hiring manager or others if already identifed.
Job Type	Select the proper job type. This listing is set up by your Insight Administrator.
List Type	Select the proper list type. This is a NEOGOV-specific listing and the selections cannot be modified.
Number of Vacancies	Enter the number of vacancies.
Custom Form Fields	If your Insight Administrator has created custom form fields they will display after the Number of Vacancies field. If applicable, complete these remaining fields.
New Position?	If this is a new position, select Yes. If this is an existing position (i.e., replacement of staff), select No.
* Position Detail	Click Add Position Detail and then enter information about the position including the position number, vacancy date, and if applicable, the first and last names of the incumbent replaced. Repeat this step if you have more than one vacancy.
Comment	Enter any additional information about the job in this field.

4. Once you're done, click Save & Continue to Next Step. The Approval Workflow page will display.
5. At this time, the state does not use workflow groups.
6. Click Save & Continue to Next Step. The Add Attachments page will display.



7. Click Save & Submit.

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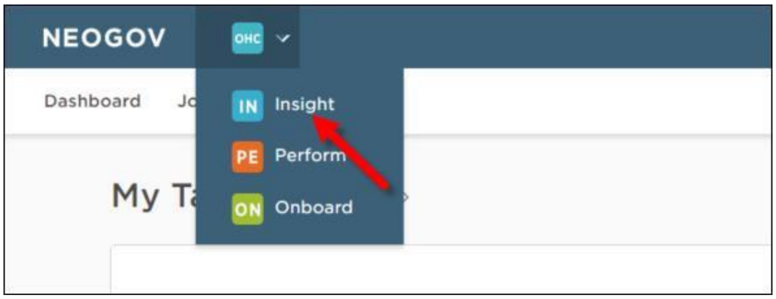
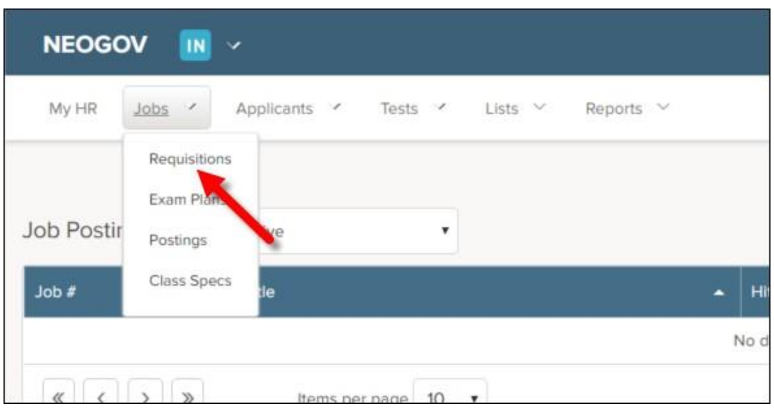
Module 2: Authorize a Requisition and Create a Recruiting File

In the previous training module, you impersonated the role of a hiring department user and created a requisition from the OHC. The requisition was created without an approval workflow and routed directly to HR. That being said, no additional work is needed in the OHC and it's now time to toggle back to Insight and assume the role of HR. On the NEOGOV Product menu, click Insight.

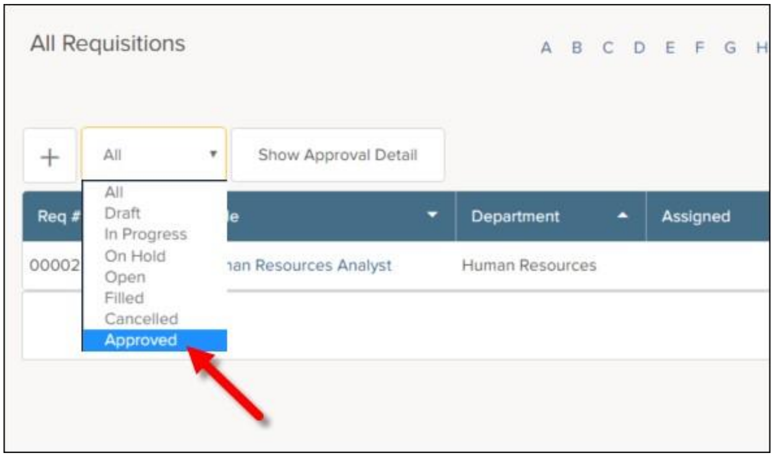


Steps to Authorize a Requisition

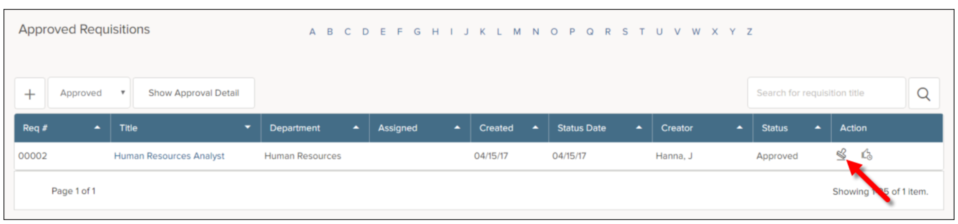
1. In a production setting, Insight users configured to receive requisition notifications would have been notified, via email, about the new requisition. This notification serves as a prompt to view the new requisition. On the Jobs menu, click Requisitions.



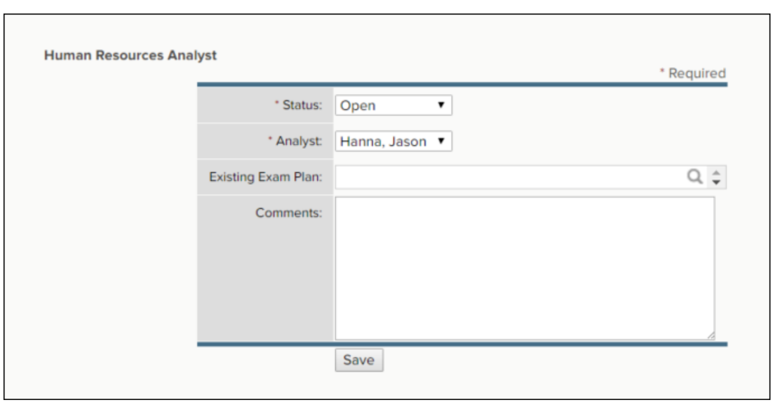
2. The first view that displays is all requisitions. This listing will grow over time, so using the Status pulldown will help you quickly find requisitions. Any new requisition that has been routed to HR to start the recruitment process will have the Status field set to Approved. On the Status pulldown, click Approved.



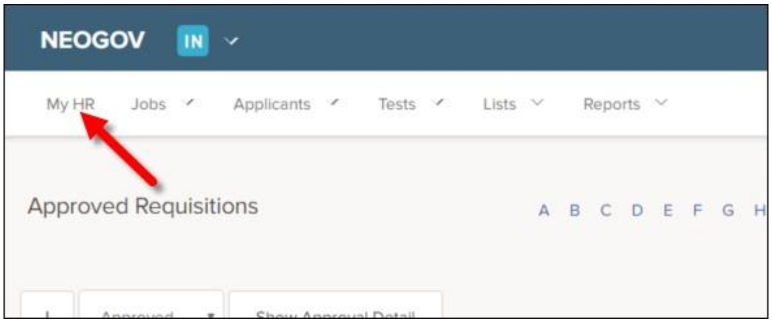
3. Locate your recently-created requisition. From the Action column, click the Authorize icon. It looks like a rubber stamp.



4. On the Status pulldown, change the selection from Approved to Open. On the Analyst pulldown, select your name. On the Existing Recruiting File (please note that NEOGOV tutorials reference these as Exam Plans) pulldown, leave with no selection as you will be creating a new Recruiting File later in this training module. This field is only used if you're retrofitting a requisition to a previously-created Recruiting File or if a requisition is created for the same job where a current list of eligible candidates can be referred to the hiring department; without the need of starting a new recruitment.



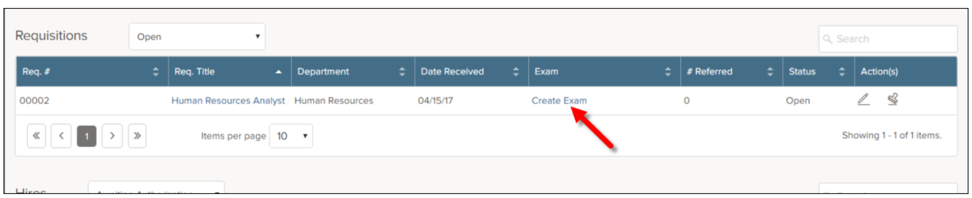
5. Click Save and then click My HR to return to your Insight dashboard.



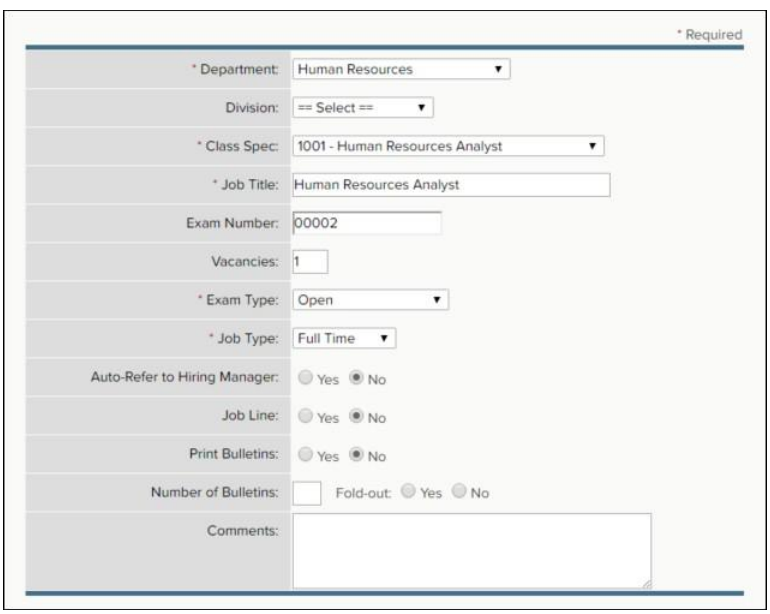
6. The requisition displays from your My HR page, Requisitions section, as you are now the assigned analyst. From the Exam column a Create Exam link is available. Once the Recruiting File is created this will be replaced with a number for quick access to the Recruiting File.

Steps to Create a Recruiting File

1. From the Exam column, click Create Exam (this is not related to the exam the applicant will complete, this is determining the type of opening, i.e. Open competitive, promotional, etc.).



2. The Recruiting File form will display.



3. Complete the form using the table below.

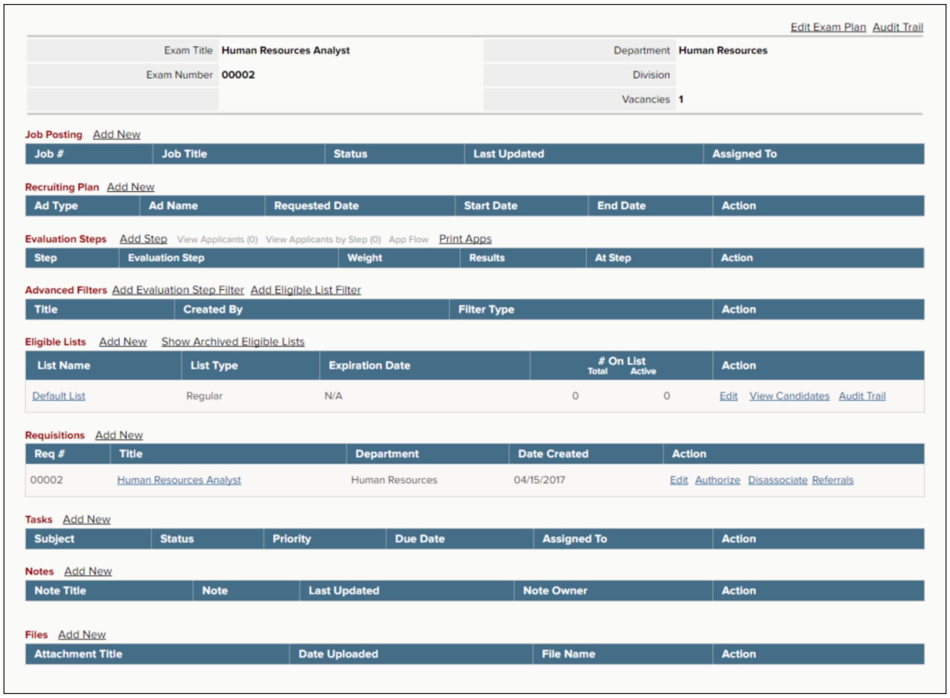
* Required

Field	What to Enter
* Class Spec	Pre-populates with the class spec specified in the requisition.
* Job Title	Pre-populates with the working job title specified in the requisition.
Exam Number	Pre-populates with the same number assigned to the requisition.
Vacancies	Pre-populates with the same number of designated in the requisition.
* Exam Type	Select the exam type from the pulldown. This is a NEOGOV-specific listing and the selections cannot be modified.
* Job Type	Select the job type from the pulldown.
* Department	Pre-populates with the department specified in the requisition.
Division	Please contact your DHR consultant to add divisions for your agency (only necessary if agency uses different workflow groups.)
Auto-Refer to Hiring Manager	Leave the default value of No as you will be evaluating candidates using a series of evaluation steps in upcoming training modules. Note: If set to Yes, candidates will be immediately referred to the hiring manager(s) designated on the associated requisition.
Job Line	This field is for tracking purposes only. If your organization uses a job line (i.e., a telephone audio recording of open jobs) then select whether or not this job is on the job line.
Print Bulletins	This field is for tracking purposes only. Select whether or not you're printing job bulletins.
Number of Bulletins	This field is for tracking purposes only. If you're printing job bulletins you track the number and whether or not they are fold-out.
Comments	Enter any additional information about the Recruiting File in this field.

4. Once you're done, click Save.

What is a Recruiting File?

A Recruiting File is a central hub for many recruitment processing activities. From the Recruiting File you can track recruitment activities and view associated records. It may help to think of the Recruiting File as a recruitment folder and many of your recruitment work is stored within this folder. See the sections table on the following page for more details.



Section	Description
Job Posting	Add a job posting from this section. Once the job posting has been added, you can view, edit, archive/unarchive and view the audit trail.
Advertising Plan	Track advertising expenditures from this section. Once an advertising item has been added, you can edit, delete and view the audit trail. Your Insight Administrator will set up the most commonly used advertising methods, e.g., Newspaper ad, Radio ad, CareerBuilder.
Evaluation Steps	Add one or multiple selection hurdles for your candidates from this section. Once an evaluation step has been added, you can edit, delete and view the audit trail. Once candidates have applied, you can view submitted applications, print applications and view candidate results and flow reports. This is where you'll spend much of your application screening/scoring time.
Advanced Filters	Add evaluation and/or eligible list filters to find specific groups of candidates from this section. Filters can be based on various data points including master profile, standard application, agency-wide and job-specific supplemental questions and evaluation step results. Once a filter has been added, you can view, edit, delete and share.
Eligible Lists	Add subsequent eligible lists from this section. Upon creating the exam plan, Insight automatically creates an eligible list for you. This eligible list, named Default List, has a list type set to Regular. You can edit, view candidates and audit trail for the default and/or subsequent eligible lists. Candidates must go through all evaluation steps prior to being placed on the regular eligible list. Conversely, candidates can be placed on a priority eligible list at any time without the requirement of going through all evaluation steps. Some examples of priority eligible lists include: promotional, transfer and layoff.
Requisitions	View the associated requisition(s) from this section. Since you created the Recruiting File from the requisition a moment ago, the requisition is automatically associated with the Recruiting File. Other actions include: add, edit, authorize, disassociate and view a resulting referred list.
Tasks	Add your other Insight users' recruitment tasks from this section. Once a task has been added you can edit and delete. The task system will send automated email notifications to assignees regarding assignments, due dates and status changes.
Notes	Add recruitment notes from this section. Once a note has been added you can edit, delete and view the audit trail.
Files	Add (upload) files applicable to the recruitment from this section. Once a file has been upload it can be downloaded or deleted.

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Module 3: Create a Job Posting

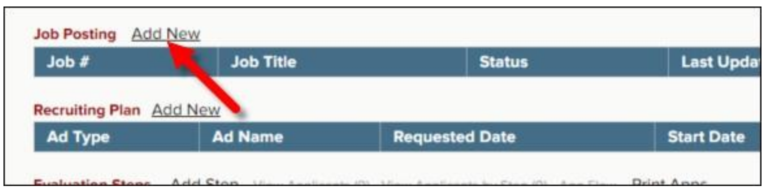
For this training module, you will create a job posting to announce the job opening on the web.

Steps to Create a Job Posting

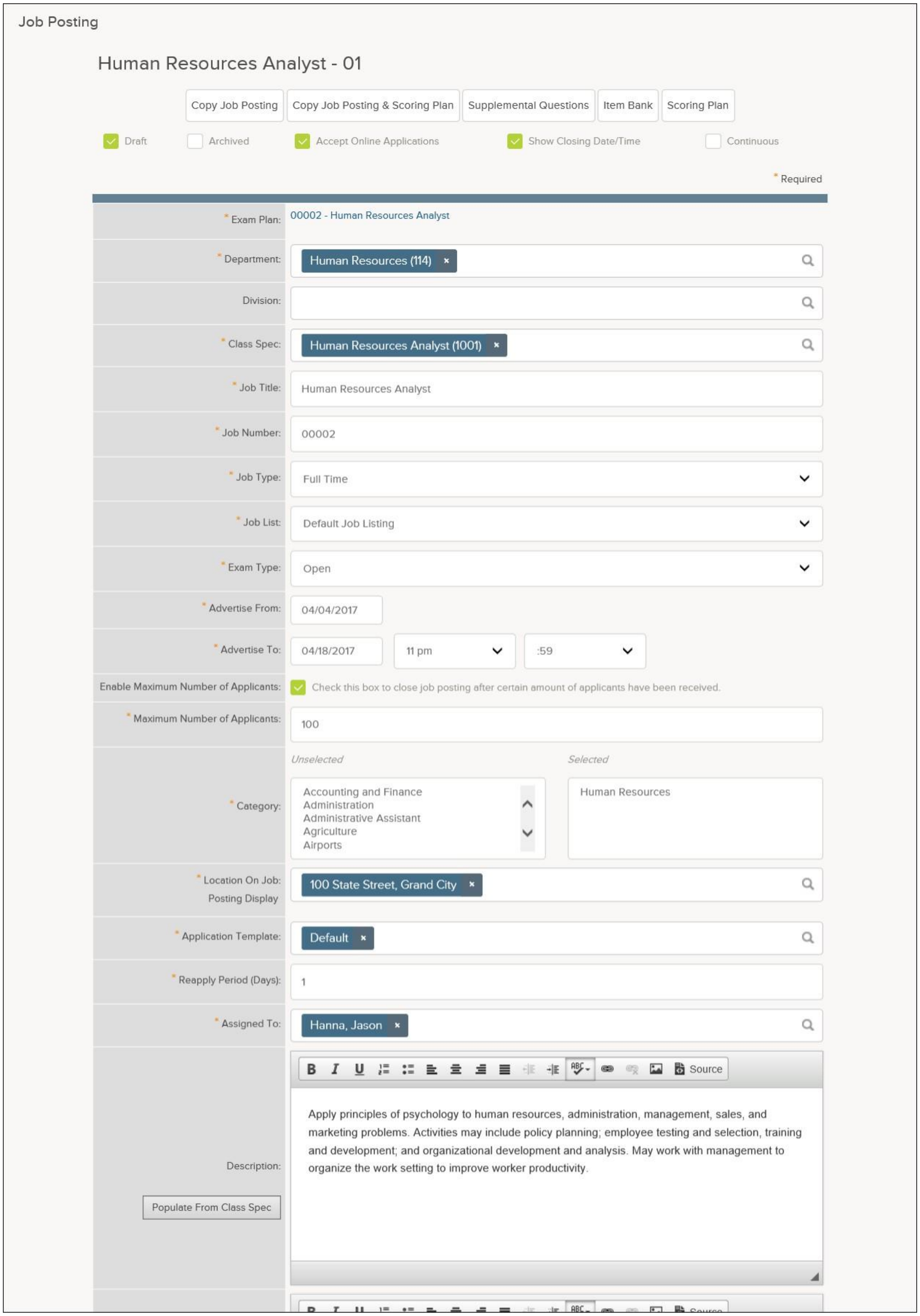
*Note: If you are using an existing/copied job posting, open that job posting and in the Recruiting File section, choose Select Existing, then search for and select the associated recruiting file.

1. If you're not already viewing your Recruiting File, return back. Again, you have a couple of ways to get there: (1) From My HR page, in the Requisitions section, click the exam number. (2) On the Jobs menu, click Recruiting Files. From the Recruiting File column, click the job title.

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



3. The job posting form will display.



Job Posting

Human Resources Analyst - 01

Copy Job Posting | Copy Job Posting & Scoring Plan | Supplemental Questions | Item Bank | Scoring Plan

Draft | Archived | Accept Online Applications | Show Closing Date/Time | Continuous

* Required

* Exam Plan:	00002 - Human Resources Analyst
* Department:	Human Resources (114)
Division:	
* Class Spec:	Human Resources Analyst (1001)
* Job Title:	Human Resources Analyst
* Job Number:	00002
* Job Type:	Full Time
* Job List:	Default Job Listing
* Exam Type:	Open
* Advertise From:	04/04/2017
* Advertise To:	04/18/2017 11 pm :59
Enable Maximum Number of Applicants:	Check this box to close job posting after certain amount of applicants have been received.
* Maximum Number of Applicants:	100
* Category:	Unselected: Accounting and Finance, Administration, Administrative Assistant, Agriculture, Airports; Selected: Human Resources
* Location On Job: Posting Display	100 State Street, Grand City
* Application Template:	Default
* Reapply Period (Days):	1
* Assigned To:	Hanna, Jason
Description: Populate From Class Spec	Apply principles of psychology to human resources, administration, management, sales, and marketing problems. Activities may include policy planning; employee testing and selection, training and development; and organizational development and analysis. May work with management to organize the work setting to improve worker productivity.

4. Complete the form using the table below.

Job Posting Checkbox Fields * Required

Field	What to Enter
Draft	Select Draft to keep the job posting in a "work in progress" state. It is a best practice to select this field until you've thoroughly reviewed the job posting and are ready to post the job online. This prevents posting online with errors or without job-specific supplemental questions.
Archived	Select Archived at the end of the recruitment process; after you've hired the ideal candidate and you're filing away records. Along with the job posting you will likely archive the Recruiting File, eligible list and referred list.
Accept Online Applications	Select Accept Online Applications to allow online candidates to submit their applications for employment.
Show Closing Date/Time	Select Show Closing Date/Time to display the closing date and time on the job posting. If the job is open until filled, then you may opt to deselect. This will remove the closing date and time from the job posting.
Continuous	Select Continuous to display the word "Continuous" for the job posting closing date and time. DHR will not manage statewide continuous applications in NEOGOV.

Job Posting Fields

Field	What to Enter
* Recruiting File	Pre-populates with the correct Recruiting File association, since you're creating the job posting from the Recruiting File.
* Department	Pre-populates with the same department assigned to the requisition and resulting Recruiting File.
Division	Pre-populates with the same division assigned to the requisition and resulting Recruiting File.
* Class Spec	Pre-populates with the class spec specified in the requisition and resulting Recruiting File.
* Job Title	Pre-populates with the job title specified in the requisition and resulting Recruiting File.
* Job Number	Pre-populates with the same number assigned to the requisition and resulting Recruiting File.
* Job Type	Pre-populates with the same job type assigned to the Recruiting File.

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Job Posting Fields (Continued) * Required

Field	What to Enter
* Job List	You have a total of three pages on which your job posting can display: (1) Default Job Listing (**Open Competitive**), (2) Promotional Jobs (**Statewide Promotional Opportunities**) and (3) Transfer Jobs (**Internal Promotional Opportunities**). The option you choose here will determine where applicants find the job on our website.
* Exam Type	Pre-populates with the same exam type assigned to the Recruiting File.
* Advertise From	Enter the date on which you will start to accept online applications for employment. At 12 midnight (in your time zone) on the opening day the job will post and accept online applications.
* Advertise To	Enter the date and time on which you will close the job and stop accepting online applications.
Enable Maximum Number of Applicants	Select to close the job posting once a specified maximum number of applications have been received. Closure will occur regardless of the Continuous field selection. If the Continuous field is not selected, the job posting will close prior to the date in the Advertise To field.
* Maximum Number of Applicants (Required if Enable Maximum Number of Applicants is selected.)	Enter the maximum number of applications that will be accepted for the job posting. If the Continuous field is not selected and the maximum is not reached, the job posting will close on the date in the Advertise To field. Note: Due to a slight syncing delay between the online application process and Insight, a few accepted applications over the maximum is possible.
* Category	Select one or multiple job categories that
* Location On Job Posting Display	Click 🔍 and select the location for this job opening.
* Application Template	Click 🔍 and select the correct application template.
* Reapply Period (Days)	Enter the number of days a candidate must wait to reapply for this job posting. If you do not want candidates to reapply for this job posting, then set the number equal to the total number of days the job posting is open, or higher. E.g., if the job posting is open for 14 days, then enter 14. Note: Setting the number to 0 is not recommended as this allows a candidate to reapply as many times as they'd prefer within the same day.

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Job Posting Fields (Continued) * Required

Field	What to Enter
* Assigned To	Leave the default value of your name or assign to others if they are managing the recruitment.
Description Example of Duties Minimum Qualifications Supplemental Information	Click “Populate from Class Spec” to copy the verbiage over from the associated class spec. This is the one and only time to take advantage of the populate function; if you return back after saving, the populate buttons will not be available. Note: Minimum Qualifications **MUST** be imported from the class spec file.
If bilingual, which language is desired?	This field is for internal tracking purposes only. If bilingual is desired for this job, then select the applicable language. If a language is selected it will not display on the job posting.

Salary Information

Field	What to Enter
Auto-Update	Select Auto-Update to have salary values updated automatically when the associated class spec’s salary values are changed.
* Minimum Salary	Enter the minimum salary for the job.
Maximum Salary	Enter the maximum salary for the job.
* Per	Select the rate that coincides with the minimum and maximum salary values.
Based on “X” hours per year	If applicable, select the correct hours per year. Note: If all your salaries are based on 2080 hours per year, then this pulldown will not exist.
* Show Salary Breakdown	Select one or multiple ways display the salary values: Hourly, Daily, Weekly, Biweekly, Semi-Monthly, Monthly and/or Annually.
Salary Display	If you do not want to display the salary in a dollar amount, then select this checkbox and then select from one of the following values: Depends on Qualifications, Negotiable, Not Displayed, See Position Description or Under Review.

Remaining Job Posting Fields

Field	What to Enter
Internal Notes (optional)	Enter any additional information about the job posting in this field. The notes will not display to OHC users or candidates.
* Supplemental Questions	Mark Yes if you have questions. Answering No here does not prevent the addition of questions at a later time.

5. Once you’re done, click Save.

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Create Job-Specific Supplemental Questions

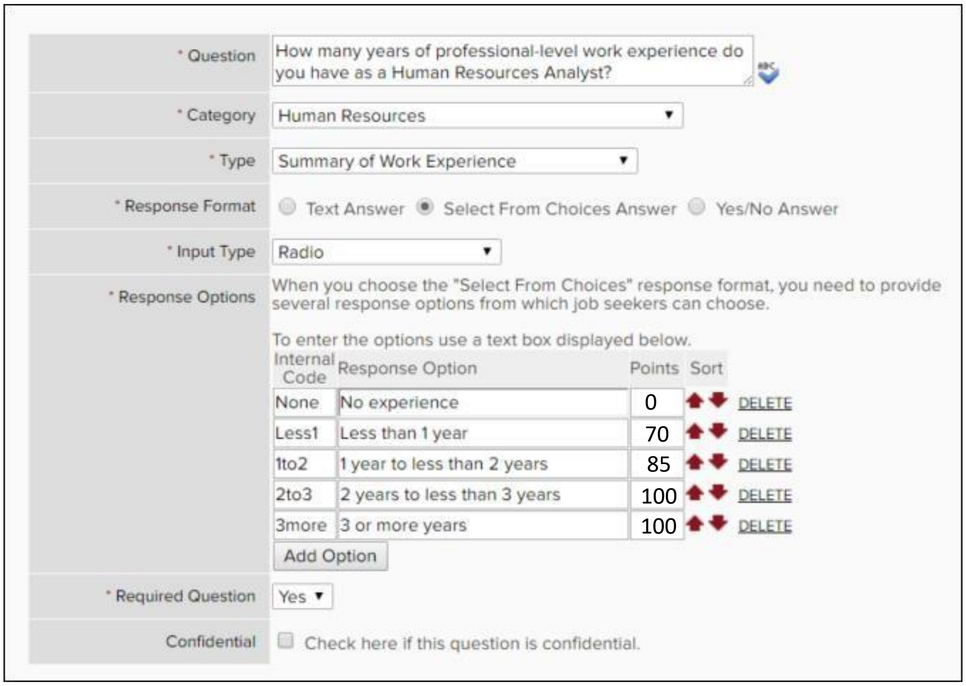
Currently the job posting is in draft status which allows for continued modifications, including the addition of questions. You will now create job-specific supplemental questions. These types of questions are often times used to gather more specific information from candidates regarding their minimum and desired qualifications that pertain specifically to the job opening.

Steps to Create Job-Specific Supplemental Questions

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

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

3. The item form will display.

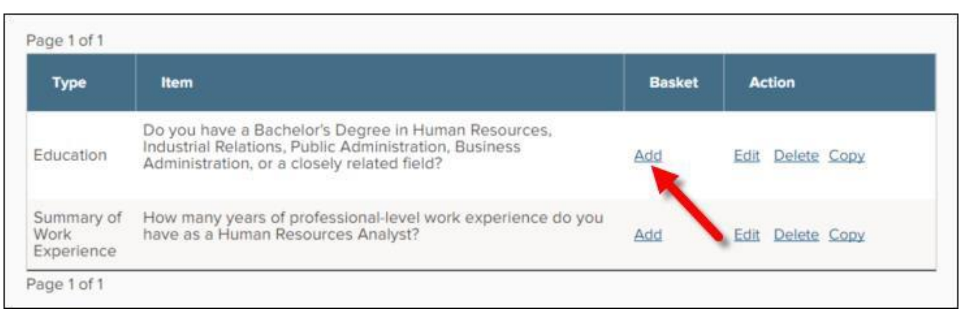


4. Complete the form using the table below.

* Required

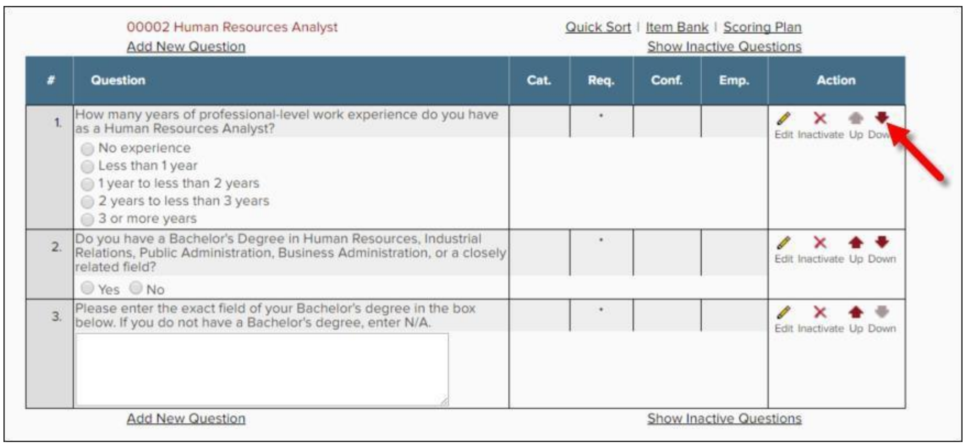
Field	What to Enter
* Question	Enter the question.
* Category	Select the proper job category.
* Type	Select the proper question type.
* Response Format	Depending on the question, select Text Answer, Select From Choices Answer. **Do not use Yes/No Answer option**.
* Input Type	If Response Format is set to Text Answer, then either Scrolling Text Box (a larger text field) or Text (a single line text field). If Response Format is set to Select From Choices Answer, then select either Radio, Drop Down Box Single, Drop Down Box Multiple, or CheckBox. Note: If the question is multiple choice, then use either Radio or Drown Down Box Single. If the question is multiple select, then use Drop Down Box Multiple or CheckBox.
* Response Options	If Response Format is set to Select From Choices Answer, then click Add Option to add a response option and then enter an abbreviation, number or letter in the Internal Code field, the description in the Response Option field, and optionally, a number in the Points field for auto-scoring setup. If your question is a Yes/No MQ, no points are necessary. If your question is a non MQ Yes/No, enter points for the option that is the correct answer. If your question has ranking answer, enter the appropriate points by response (ie. 0, 70, 85, or 100). Repeat these steps to add additional response options.
* Required Question	Select Yes to prevent candidates leaving the question unanswered. Select No if answering the question is optional.
Confidential	Select Confidential if there should be restricted viewing of candidates' responses; otherwise, leave the checkbox deselected. Only Insight users with access to view confidential information will see confidential questions. OHC users will not see confidential questions, regardless of permissions.

5. Once you have saved your newly created question, search for it and add it to your question list. This will add the question to your basket.



6. Repeat steps 2-5 to add more questions.
   *If you want to use existing question in the item back, add them to your list and check out. You can then edit the question from your job posting. Editing questions from the item bank view will change the question for all users.
7. Once you're done, click Checkout.

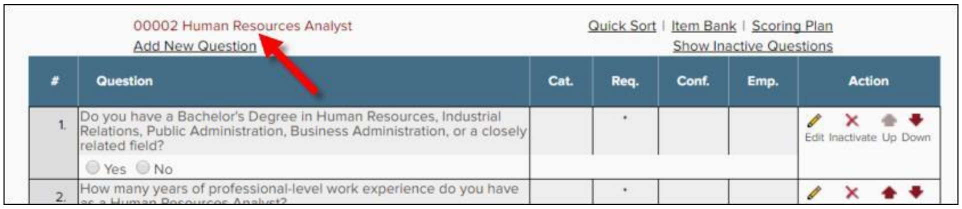
8. Click the up and down arrows to arrange questions in the proper order.



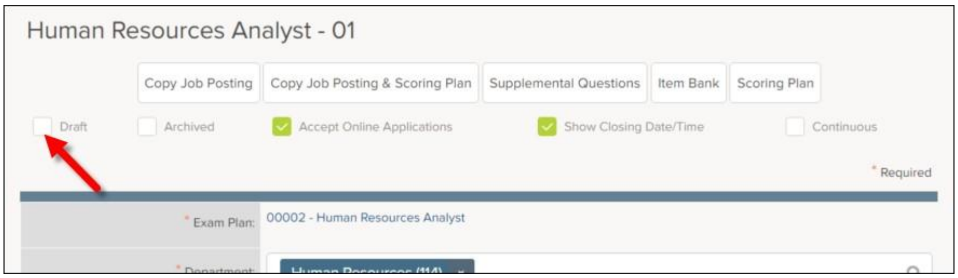
9. When you finished adding and editing the supplemental questions, click on the job posting number and title to return to your draft.

Steps to Publishing the Job Posting on the Web

1. Currently your job posting is in draft status. Now it's time to take your job posting out of draft status and publish it on the web. To do so, return back to the job posting edit page. A shortcut to this page exists from the current page. Click the job number and title that displays in red text.



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



3. You've published your job posting on this web and it is now viewable on the State's Job Opportunities page: https://www.governmentjobs.com/careers/idaho.

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Module 4: Create Evaluation Steps

Important Note Regarding Evaluation Steps

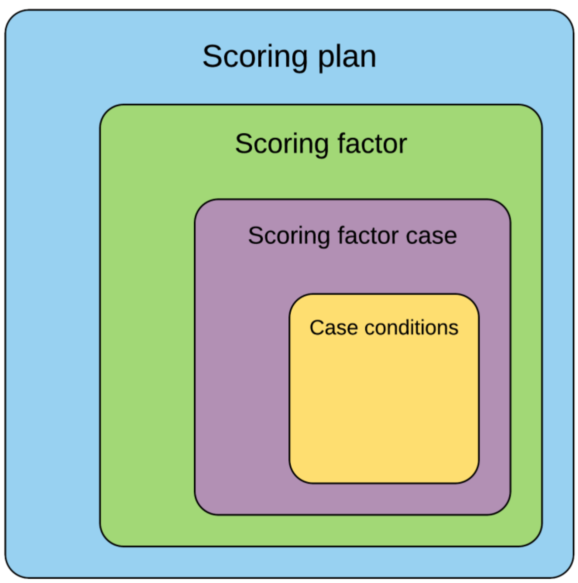
This training module series will feature the two most common evaluation step types: Supplemental Questionnaire and Rating Matrix.

Evaluation Step: Supplemental Questionnaire

All multiple choice questions need to go through the first scenario. Whether they are an MQ, supplemental, ranking, or extra credit, they must be set up in the first scenario. Only questions that have associated point scores, like 70, 85, or 100 depending on the response need to go through scenario 2.

Create a scoring plan

The scoring plan is the "brain" of the operation. From the scoring plan you'll program the correct and/or scored responses to the job-specific supplemental questions. The scoring plan is comprised of scoring factors, scoring factor cases and case conditions. All of these elements will be defined when they're created within the training exercise. The key attribute to remember is a scoring plan has multiple layers.



To create a scoring plan:

1. If your recently-created, job-specific supplemental questions currently displays, click Scoring Plan. If not, on Jobs menu, click Postings.
2. Locate your job posting and click the job title to view the job posting.
3. Click Scoring Plan.
4. Since no scoring plan elements exist, a predominately blank page will display. Click Add New Scoring Factor.

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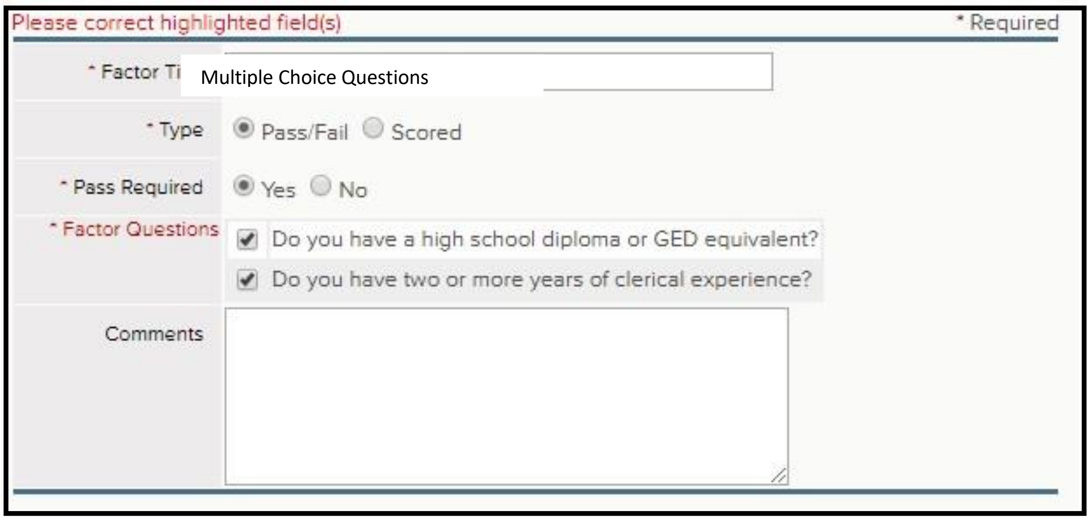
Scoring factor defined

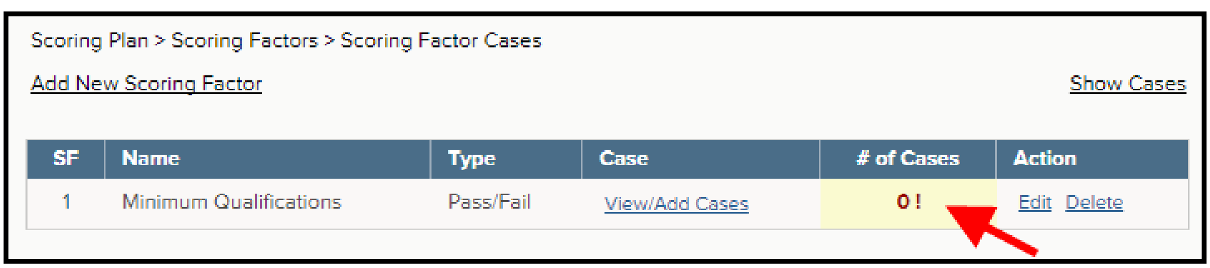
The scoring factor is the method in which you evaluate applicants.

5. From the Factor Title field, enter a title (e.g. Multiple Choice Questions).
6. From the Type field, select Pass/Fail and click Save.
7. From the Pass Required field, select Yes. This will always be the setting.
8. From the Factor Questions field, select all multiple choice questions. Questions that require a narrative response will be addressed later. Scoring plans are only for questions the system can auto-grade.


Please correct highlighted field(s) * Required

* Factor Ti	Multiple Choice Questions
* Type	Pass/Fail Scored
* Pass Required	Yes No
* Factor Questions	Do you have a high school diploma or GED equivalent? Do you have two or more years of clerical experience?
Comments	

9. Once you're done, click Save.
10. From the # of Cases column you'll notice a red zero and exclamation mark. Pass/fail scoring factors are not complete until they have at least one scoring factor case. This alert is there to remind you, "Don't forget the scoring factor case!"


Scoring Plan > Scoring Factors > Scoring Factor Cases

Add New Scoring Factor Show Cases

SF	Name	Type	Case	# of Cases	Action
1	Minimum Qualifications	Pass/Fail	View/Add Cases	0 !	Edit Delete

11. Click View/Add Cases.
12. Since no scoring factor cases exist, a mostly blank page will display. Click Add New Factor Case.

Scoring factor case defined

The scoring factor case is a specific set of conditions that characterizes a passing applicant. You must provide at least one set of passing conditions—the case—for a pass/fail scoring factor.

13. From the Case Title field, enter a title (e.g., Multiple Choice Questions) and click Save.

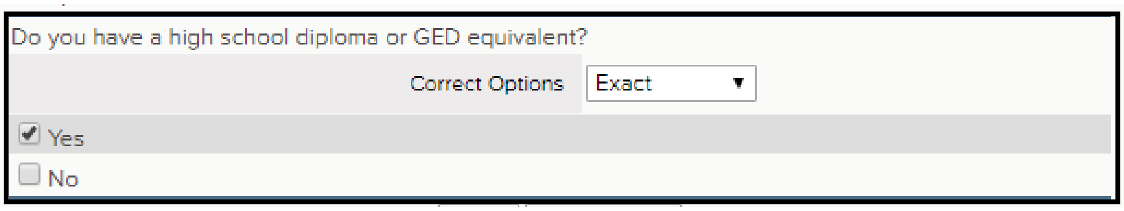
14. You've created the score factor case, but currently it's empty. It doesn't have the conditions that define a passing applicant (i.e., the correct answers). To fix this, click Edit.

15. From the first job-specific supplemental question, click Add Condition.

Case condition defined

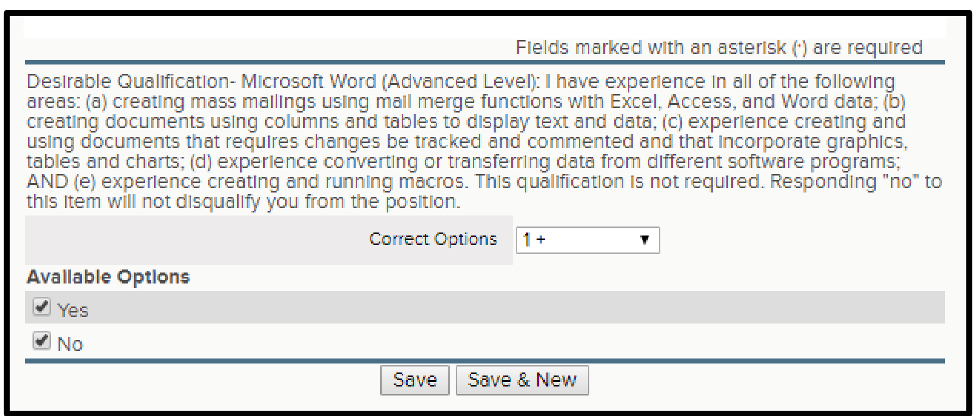
The case condition is the most finite member of the scoring plan family. Easily defined, the case condition is the correct response, or responses, to a job-specific supplemental question.

16. From the question responses, select all correct responses. In this example, there is only one correct response. Select Yes.
17. From the Correct Options field, select Exact.



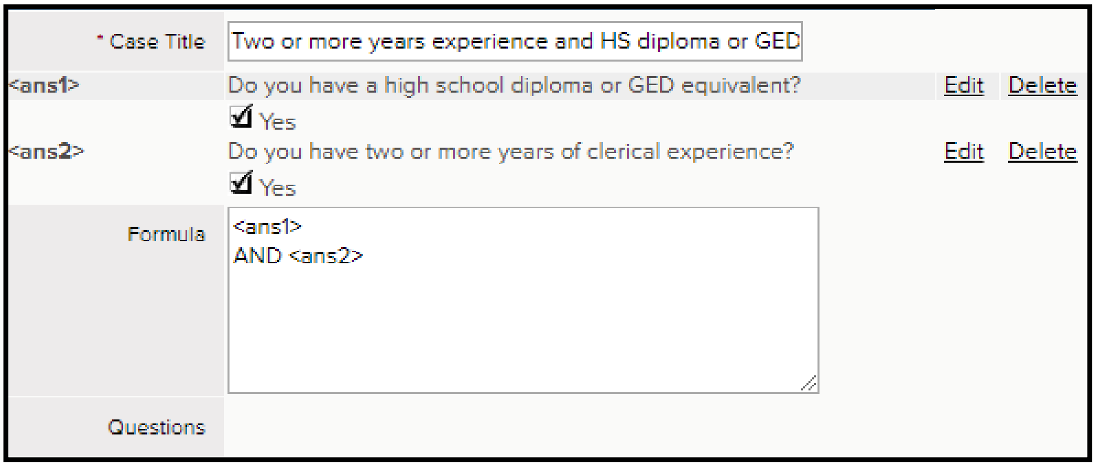
Tip: Here is an easy-to-remember rule for the Correct Options field: If the question is a multiple choice and there is only one correct response, always select Exact.

18. If your multiple choice question does not have one right answer (for instance if it is extra credit and you do not want the applicant to fail because they do not have the qualification, or if the question is a ranking item and three of the four options would pass the applicant), then select all answer options that are passing and select 1+ for the correct options drop down.



19. Once you're done, click Save.
20. You've created the case condition for the first question. Now it's time to do the same for the rest of the questions. From the remainder of the job-specific supplemental questions, click Add Condition and complete accordingly.

21. Click Save to save the changes to the scoring factor case.



22. The completed scoring factor and cases will help the system evaluate applicants and pass or fail them based on their responses.

Scenario 2: Multiple Choice Questions that Award Points

For the second scenario you'll be completing a basic screening with an additional scored component. Note: If you do not have multiple choice questions with different point possibilities (e.g., all multiple choice questions are MQ with only one right answer), you can skip scenario two. If you have extra credit multiple choice questions or ranking multiple choice questions, complete this scenario.

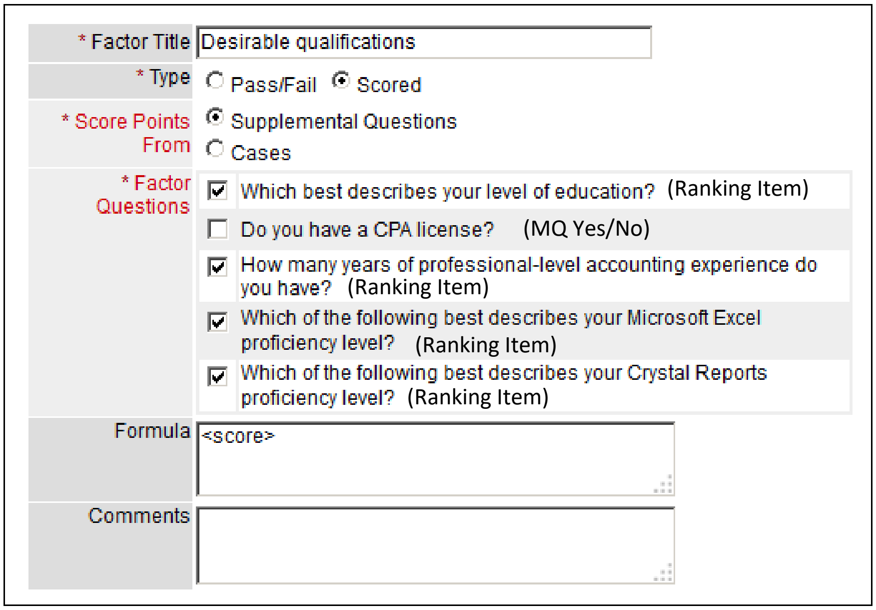
Create a scoring plan

This time there is a scored scoring factor for the questions that award points. This will total the assigned points to responses of job-specific supplemental questions. An applicant with many desirable qualifications will receive a higher point value than an applicant with few or no desirable qualifications.

To create a scored scoring factor:

1. To create the scored scoring factor click Add New Scoring Factor.
2. From the Factor Title field, enter a title (e.g., Points).
3. From the Type field, select Scored and click Save.
4. From the Score Points From field, select all Supplemental Questions that award points to the applicant based on their response.

5. From the Factor Questions field, select all questions that have assigned points. Remember: You assigned points when you created the question in Module 3. You can always go back and edit questions to add and/or remove points.



6. Once you're done, click save.
7. That's it! Scored scoring factors that score points from job-specific supplemental questions simply add up the points assigned to responses. Envision an adding machine which completes the single task of adding numbers.

Create a supplemental questionnaire evaluation step

Creating a supplemental questionnaire evaluation step ties everything together and scores your applicants upon applying or once they're advanced to the evaluation step. The work you have done to establish scoring factors will not be completed until you create the evaluation step. It is the trigger for the auto-scoring features.

To create a supplemental questionnaire evaluation step:

1. On Jobs menu, click Exam Plans.
2. Locate your exam plan.
3. From the Exam Plan column, click the title to view the exam plan.
4. From the Evaluation Steps section, click Add Step.

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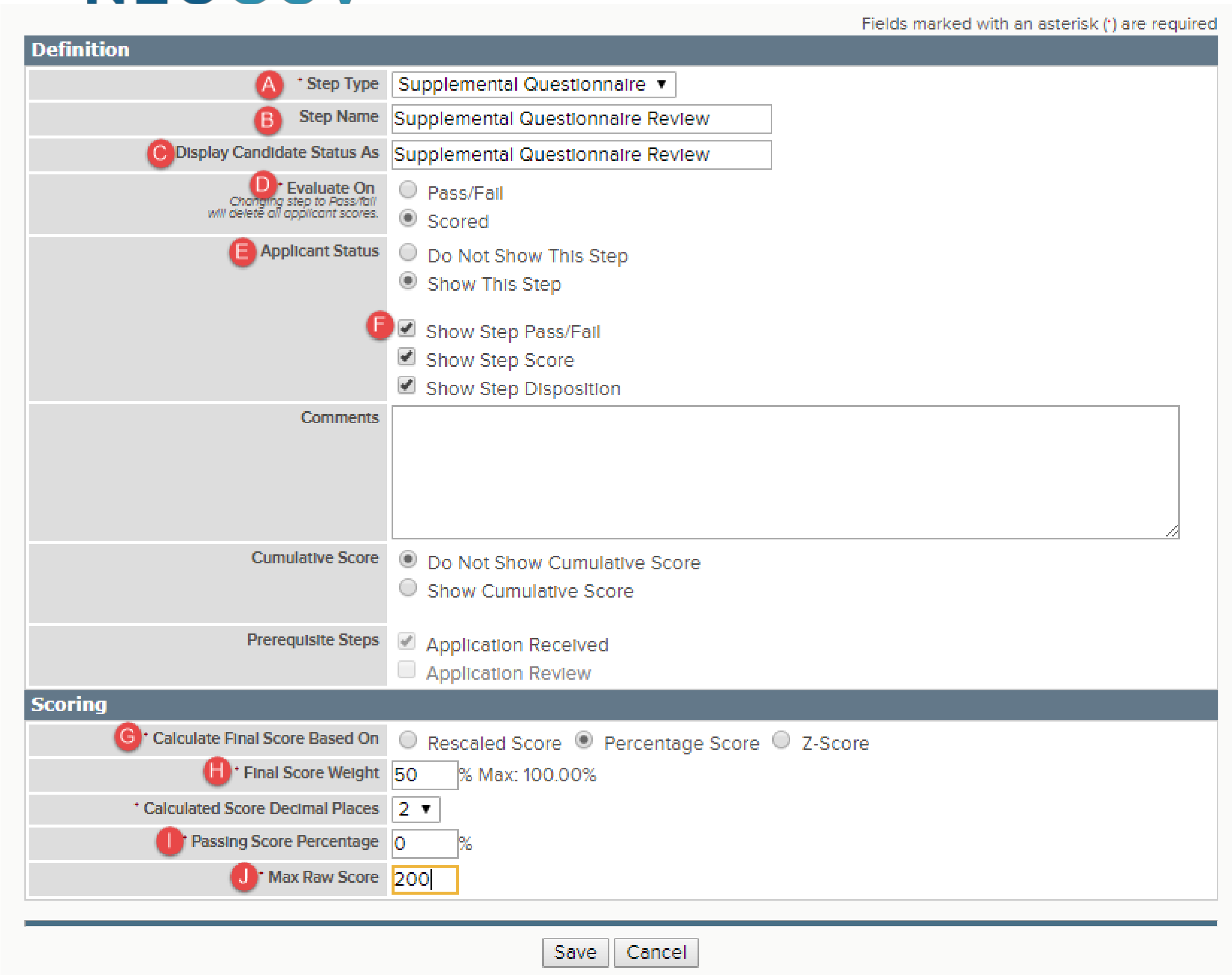


a. Step Type: Always select Supplemental Questionnaire.
b. *Step Name: Enter step name Supplemental Questionnaire Review.
c. *Display Candidate Status As: Supplemental Questionnaire Review.
d. Evaluate On: Always select Scored.
e. *Applicant Status: Select Show This Step.
f. *Select Show Step Pass/Fail, Show Step Score, and Show Step Disposition.
g. Calculate Final Score Based On: Select Percentage Score.
h. Final Score Weight: This is where you decide how much this step impacts the overall score used to rank applicants. If there are no points allotted to any questions, it would be a zero. If some points come from these multiple choice questions and then some from a SME review, assign part of the total points (e.g., 40%, 50%, 60%, etc.). If this is the only step that applicants earn points in, make it 100% of the total score.
i. Passing Score Percentage: Enter zero as your scoring plan will take care of the passing and failing for you.

j. Max Raw Score: Enter the total number of points possible for the multiple choice questions. For example, if you had a total of three multiple choice questions that awarded points, the max raw score would typically be 300 (this assumes question point values follow typical state practices of 0, 70, 85, 100). Entering the total points possible here allows the system to calculate a percentage score based on applicants' responses.

***Marked items are required per IDAPA 15.04.01.095**.

5. Once you're done, click Save.

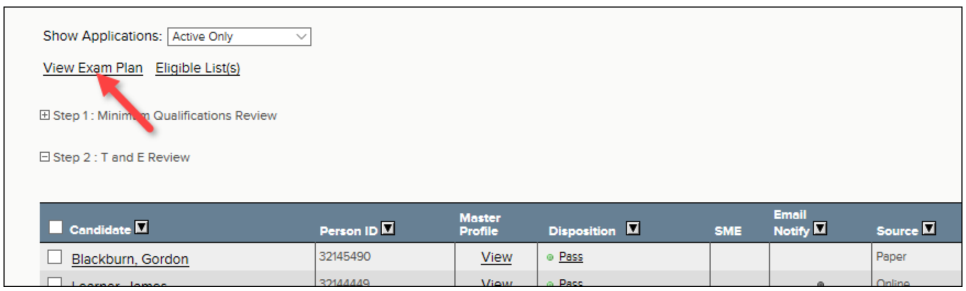
Evaluation Step: Rating Matrix Review (Scoring Narrative Responses with a SME)

For this training module, you will create a Rating Matrix evaluation step. Rating Matrix evaluations are assessments of candidates based on narrative responses.

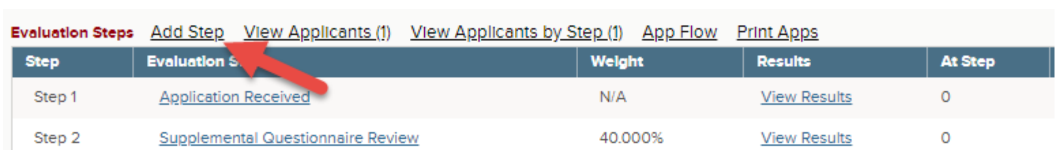
Steps to Complete a Rating Matrix Evaluation

1. If you're not already viewing your Recruiting File, return back. From the My HR page, click exam number. Alternatively, on the Jobs menu, click Recruiting Files and then click the job title from the Recruiting File column.

2. If you've just completed the previous training module, click View Recruiting File.



3. From the Evaluation Steps section, click Add Step.



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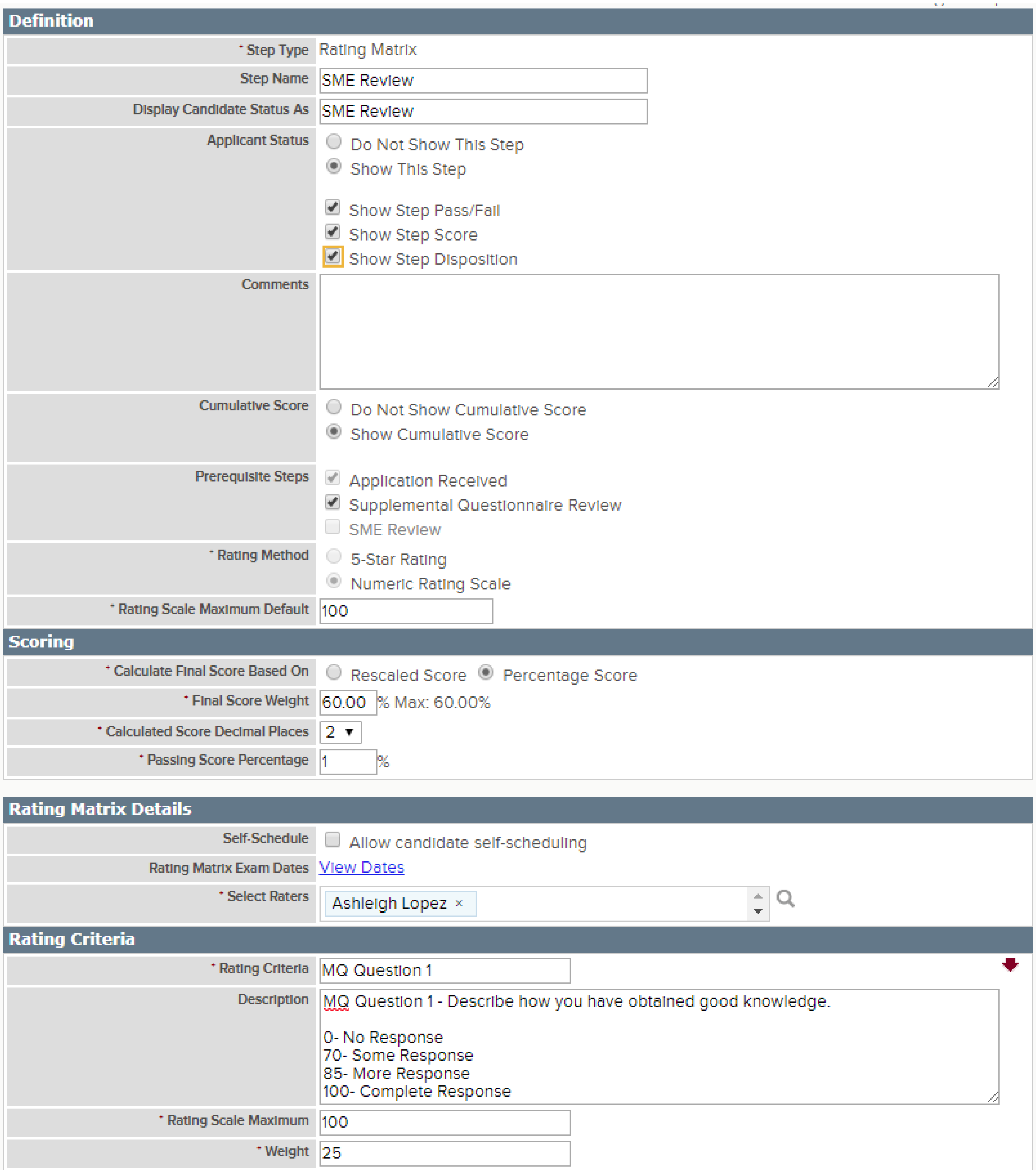
4. The evaluation step form will display.



Definition

* Step Type	Rating Matrix
Step Name	SME Review
Display Candidate Status As	SME Review
Applicant Status	○ Do Not Show This Step ◉ Show This Step ☑ Show Step Pass/Fail ☑ Show Step Score ☑ Show Step Disposition
Comments	
Cumulative Score	○ Do Not Show Cumulative Score ◉ Show Cumulative Score
Prerequisite Steps	☑ Application Received ☑ Supplemental Questionnaire Review ☐ SME Review
* Rating Method	○ 5-Star Rating ◉ Numeric Rating Scale
* Rating Scale Maximum Default	100

Scoring

* Calculate Final Score Based On	○ Rescaled Score ◉ Percentage Score
* Final Score Weight	60.00 % Max: 60.00%
* Calculated Score Decimal Places	2
* Passing Score Percentage	1 %

Rating Matrix Details

Self-Schedule	☐ Allow candidate self-scheduling
Rating Matrix Exam Dates	View Dates
* Select Raters	Ashleigh Lopez ×

Rating Criteria

* Rating Criteria	MQ Question 1
Description	MQ Question 1 - Describe how you have obtained good knowledge. 0- No Response 70- Some Response 85- More Response 100- Complete Response
* Rating Scale Maximum	100
* Weight	25

5. Complete the form using the table below.

* Required

Field	What to Enter
* Step Type	Select Rating Matrix.
*Step Name	Enter Rating Matrix Review, or something similar.
*Display Candidate Status As	Enter "Subject Matter Expert Application Review," or something similar.
*Applicant Status	Select Show This Step to display the message entered in the Display Candidate Status As field. Select Show Step Pass/Fail, Show Step Score, and Show Step Disposition.
Comments	Enter any additional information about the evaluation step in this field.
Cumulative Score	This shows internal users the applicants' total score in there are Multiple evaluation steps.
Prerequisite Steps	Leave all steps selected.
Rating Method	Numeric Rating Scale
Rating Scale Maximum Default	Enter 100. This identifies the most points possible per question.
Calculate Final Score Based On	Select Percentage Score
* Final Score Weight	If this is your only scored evaluation step and you want the score to make up the candidate's final score, set to 100%. If you have or will have additional scored evaluation steps, set the percentage value accordingly.
* Calculated Score Decimal Places	Accept the default.
Passing Score Percentage	Set the passing score to 1%. This allows the SME to "auto-fail" an applicant by entering a zero for all questions.
* Select Raters	Click 🔍 and select your name or the SME name if you know it (it can be changed later).
* Rating Criteria	Enter the name for your first rating criteria. It is best to give your SME as much information as possible. Use question numbers and MQ or Extra Credit when possible.
Description	Enter the description of the question. Include the question text and the grading criteria here. Assist the SME in reminding them if this is an MQ or not.
Rating Scale Maximum	Enter 100. This is the total number of points possible for the question.
Weight	Each response can carry a different weight towards the overall score for this step. The weights for each question must combine to a total of 100.

6. Clicking on Add Rating Criteria will provide space to enter information for the next question. You will need to create Rating Criteria for each individual open response question.

   Note: You can enter a maximum of ten rating criteria. This means no more than 10 open ended questions per job posting.

7. Click Save once you're done.

***Marked items are required per IDAPA 15.04.01.095**.

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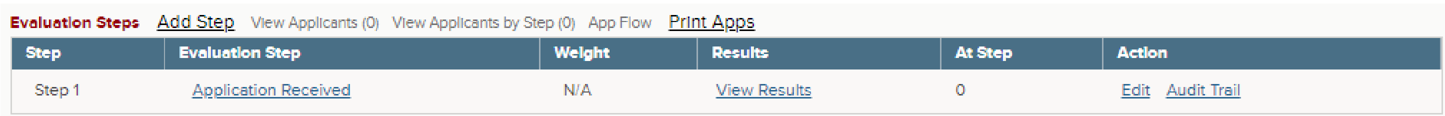
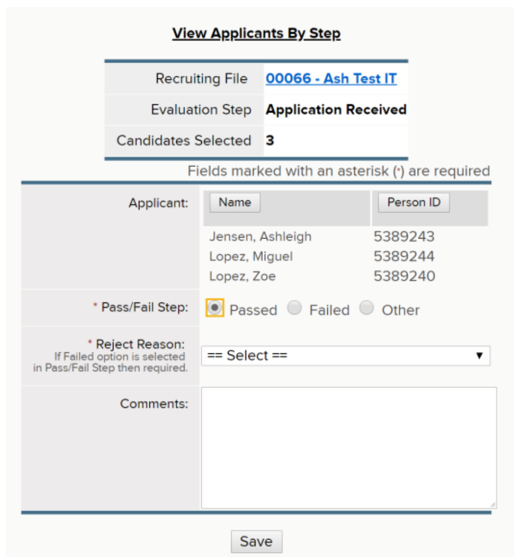
Module 5: Evaluate Candidates

Steps to Evaluate Candidates

1. Return back to your Recruiting File.
2. Click on the Application Received Evaluation Step



3. From the Select Action Dropdown, select Change Disposition and In Select Candidates, choose All and click Go.
4. Select Passed and Save.

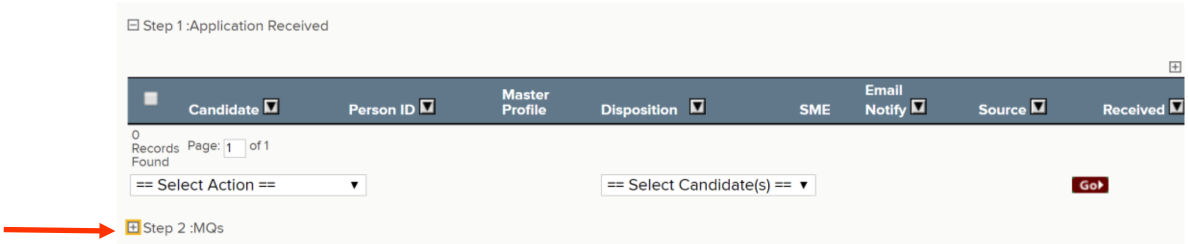


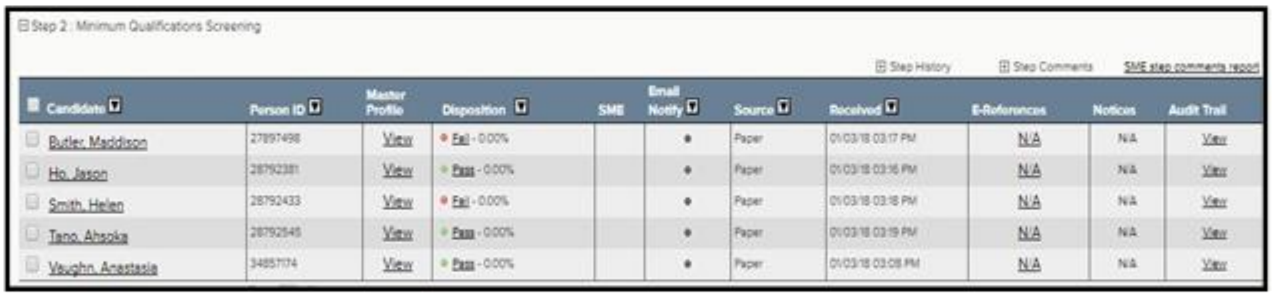
5. To advance your applicants on to the next evaluation step, select Advance to Next Step and in Select Candidates, choose All, then click Go.

Auto-Scoring

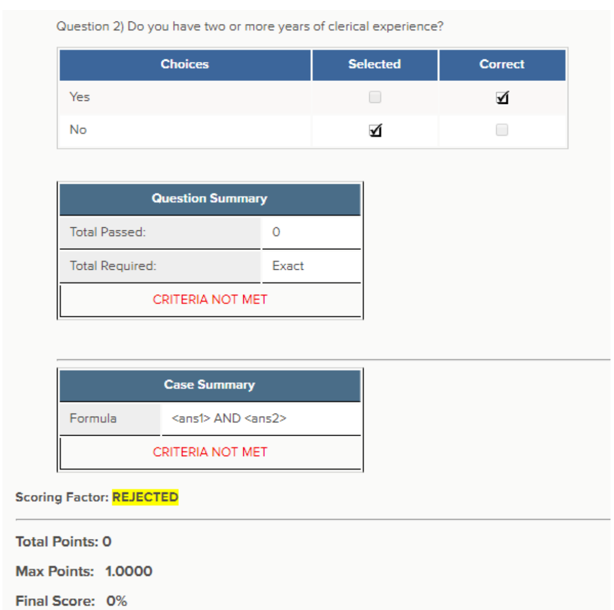
This section addresses the evaluation of candidates in a Supplemental Questionnaire auto-scoring step.

1. Click the + sign next to your supplemental questionnaire evaluation step to view applicants. If auto-scoring is set up properly, passing and failing applicants will display.



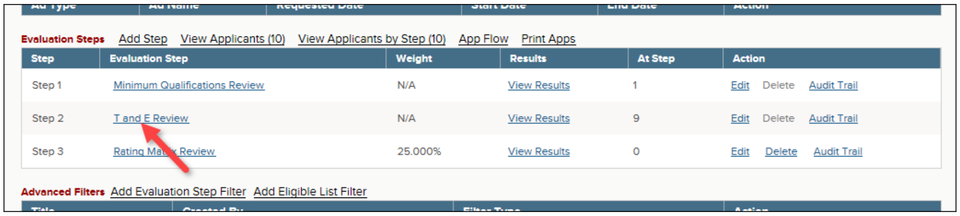


2. Click View Recruiting File to return back.
3. From the Results column, click View Results for your supplemental questionnaire evaluation step for a different perspective. Your applicants will display divided into two groups: passing and failing.
4. From the Details column, click View for one of your failing applicants.
5. To see exactly how the applicant failed minimum qualifications, click Show Questions.

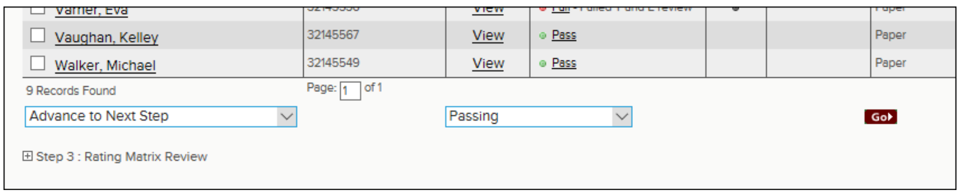


Rating Matrix- SME Review

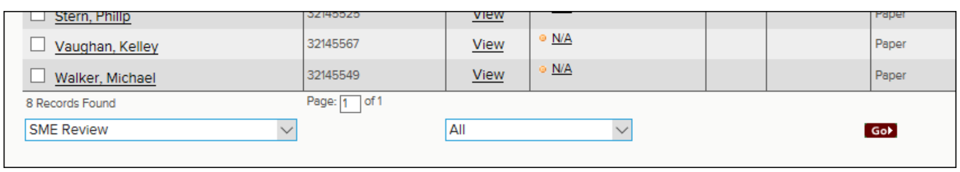
1. Click the name of the step preceding your SME review step, to view and advance all passing candidates.



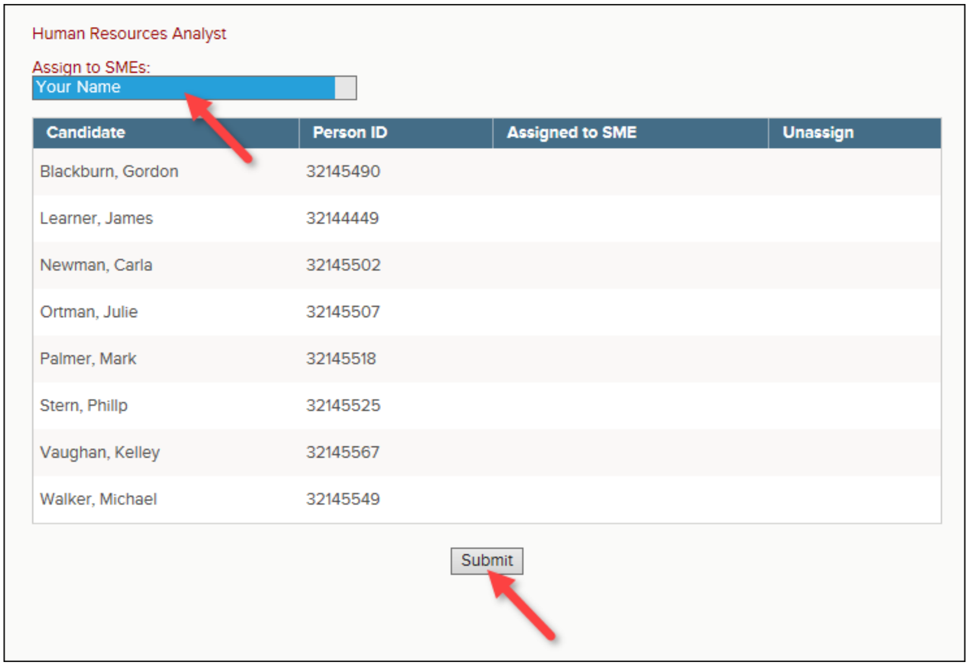
2. To advance the passing candidates, select Advance to Next Step from the Select Action pulldown, select Passing from the Select Candidate(s) pulldown and click Go.



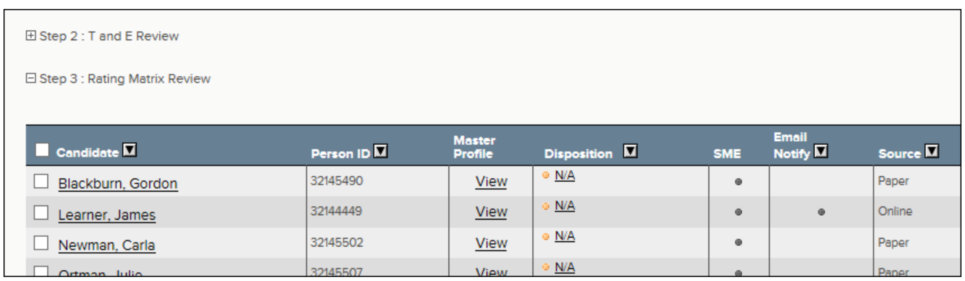
3. Click the minus sign to the left of the preceding step to collapse and click the plus sign to the left of the recently-created step to expand. Select SME Review from the Select Action pulldown, select All from the Select Candidate(s) pulldown and click Go.



4. From the Assign to SMEs field, select the SME's name and then click Submit. This will send an email notification to the assigned SME(s). You may select multiple SMEs. To use multiple SMEs, select only the number of applicants to be assigned to the first SME, then select SME Review, and choose Selected Candidates. After clicking on Go, choose the SME for the first group. Then click Submit. Next, select the second batch of applicants to assign to the second SME and complete the process again.



5. From the SME column, dots will display. These indicate the candidates that have been assigned to a SME for review.



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Module 7: Refer Candidates to the Hiring Manager

For this training module, you will place all candidates that passed the minimum qualifications review and any additional evaluation steps on an eligible list. An eligible list is a listing of qualified candidates. From the eligible list you will refer a subset or all candidates to the hiring department. Multiple eligible lists can be maintained to provide evaluation step exemptions and/or sorting preference when sent to the hiring department. E.g., internal candidate may not be required to take a written exam and are immediately referred to the hiring department, displaying first on the referred list, followed by the external candidates.

Steps to Place Candidates on an Eligible List

1. If you're not already viewing your Recruiting File, return back.

2. From the Eligible Lists section an eligible list entitled *Default List* already exists. This will be the case for any new Recruiting File. Click Edit to configure the eligible list's attributes.

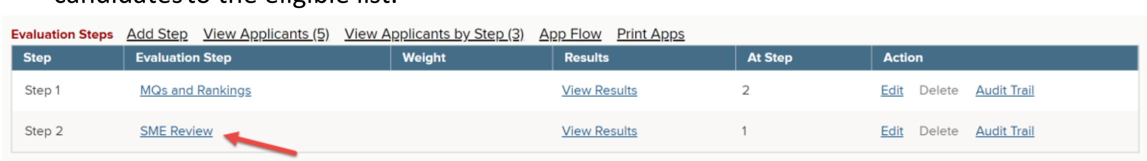
3. The eligible list detail page will display.

4. Complete the form using the table below.

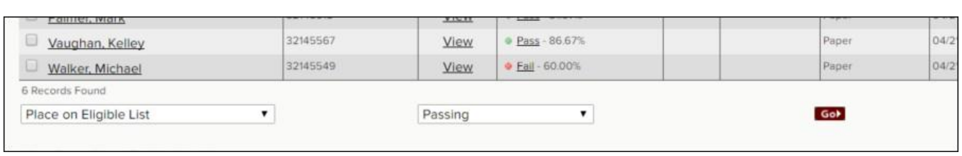
* Required

Field	What to Enter
* List Name	Enter the name of the eligible list if different than the default name of *Default List*.
Display Candidate Status As	This message will display to candidates who sign back into Career Pages to see their current application status. Enter “Placed on Eligible List”.
Promulgation Date	Date of when the eligible list was initially created. This date can be adjust to the date when candidates were placed on the eligible list.
Expiration Date	Either a specific expiration date or the total number of days (below field).
Days Candidate Eligible	Either the total number of days or specific expiration date (above field).
* Exam Score Decimal Places	Accept the default or choose a different value.
* Total Score Decimal Places	Accept the default or choose a different value.
* Calculate Exam Score Based on	Select Percentage Score.
Banded Score (Low) Cutoff Values	Leave this field blank.
Band Scores Based On	Leave the default selection of Exam Score.
Duplicate Handling	Leave the default selection of Allow Duplicates.
List Type	Leave the default selection of Regular.
List Status	Leave the default selection of Active.
Comments	Enter any additional information about the eligible list in this field.

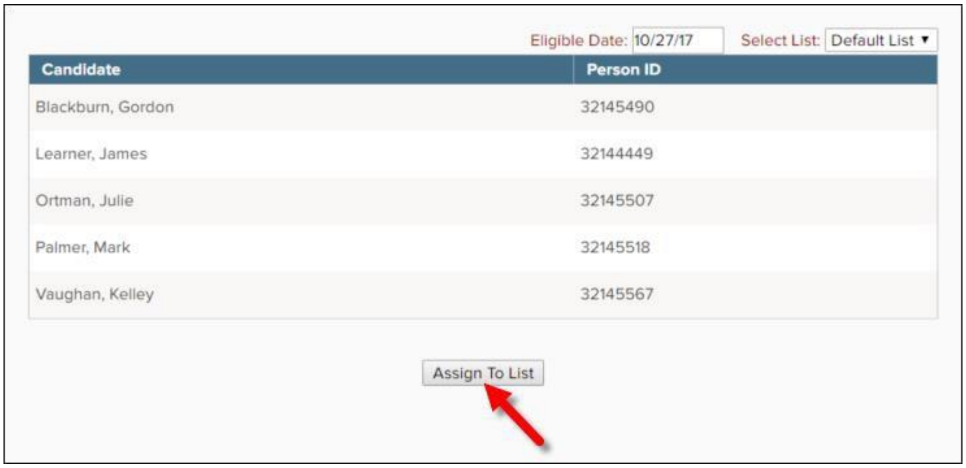
5. Click Save once you’re done.
6. Click the last evaluation step name to view candidates by step and advance all passing candidates to the eligible list.



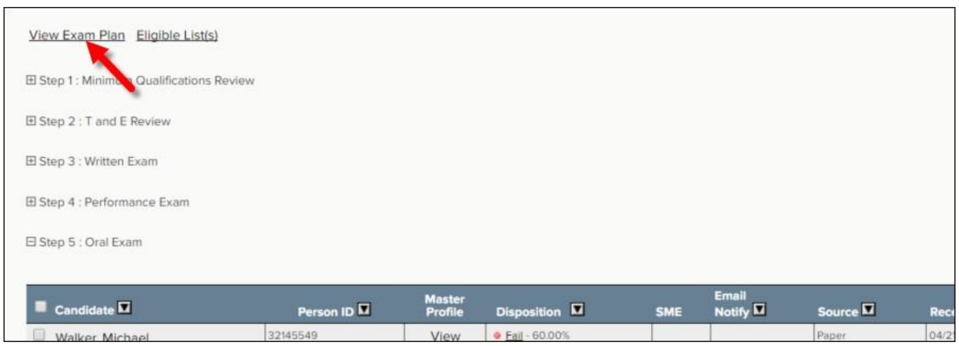
7. To place the passing candidates on the eligible list, select Place on Eligible List from the Select Action pulldown, select Passing from the Select Candidate(s) pulldown and click Go.



8. Leave the default of today's date from the Eligible Date field, select the appropriate eligible list if different than the default of Default List from the Select List field, and click Assign To List.

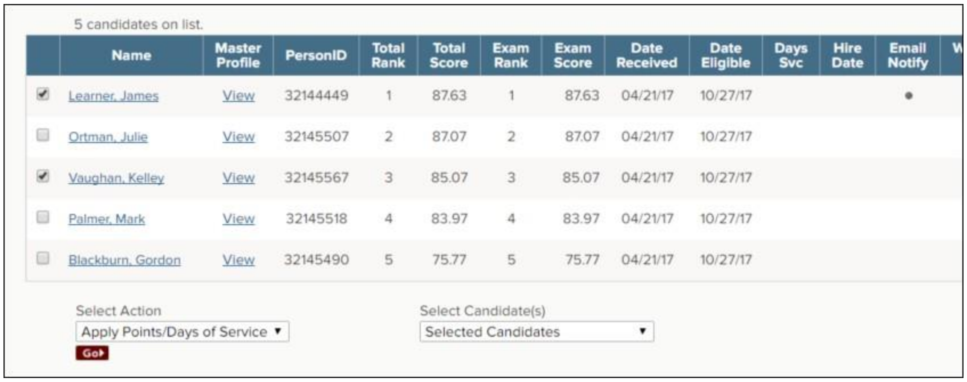


9. After the passing candidates are placed on the eligible list, click View Recruiting File.



10. To view the eligible list, click View Candidates from the Eligible Lists section.

11. Veteran's preference points have been added once the applicant is placed on the eligible list. Their Veteran Status is also identified as Single Diamond Vet (D) or Double Diamond Vet (DD).



5 candidates on list.

	Name	Master Profile	PersonID	Total Rank	Total Score	Exam Rank	Exam Score	Date Received	Date Eligible	Days Svc	Hire Date	Email Notify
☑	Learner, James	View	32144449	1	87.63	1	87.63	04/21/17	10/27/17			•
☐	Ortman, Julie	View	32145507	2	87.07	2	87.07	04/21/17	10/27/17			
☑	Vaughan, Kelley	View	32145567	3	85.07	3	85.07	04/21/17	10/27/17			
☐	Palmer, Mark	View	32145518	4	83.97	4	83.97	04/21/17	10/27/17			
☐	Blackburn, Gordon	View	32145490	5	75.77	5	75.77	04/21/17	10/27/17			

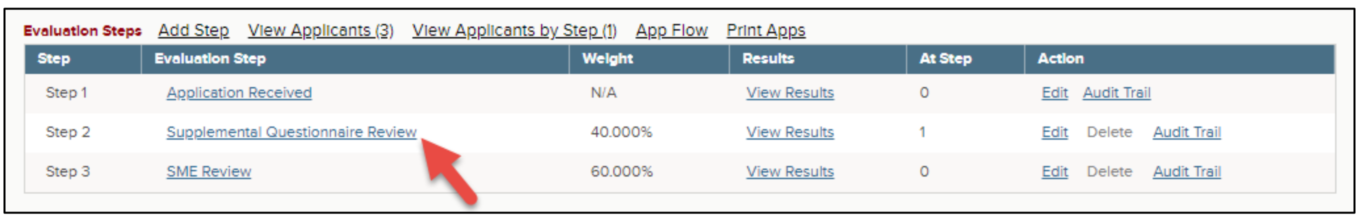
Select Action: Apply Points/Days of Service
Select Candidate(s): Selected Candidates
Go

Notifying Applicants of their Total Overall Scores/Status

In accordance with IDAPA 15.04.01.095, all applicants must be notified of their total overall score for an application. In NEOGOV, this is done by generating and sending a message through the system. **IMPORTANT: Templates have been created for this process. DO NOT EDIT the templates as they will be used statewide.**

Failed Applicants

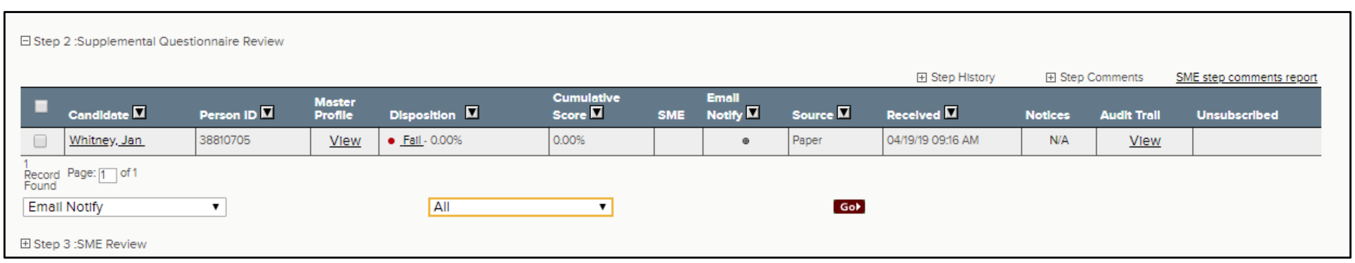
1. The first set of notifications generated will be for applicants that did not meet minimum qualifications in the recruitment's evaluation steps.
2. View the first evaluation step with failing candidates.



Evaluation Steps | Add Step | View Applicants (3) | View Applicants by Step (1) | App Flow | Print Apps

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	0	Edit Audit Trail
Step 2	Supplemental Questionnaire Review	40.000%	View Results	1	Edit Delete Audit Trail
Step 3	SME Review	60.000%	View Results	0	Edit Delete Audit Trail

3. From the Select Action drop down, choose Email Notify.
4. In the Select Candidates drop down, choose All (at this point in the recruitment process all applicants still in this evaluation step have failed to meet the requirements).
5. Then click Go.



⊟ Step 2 :Supplemental Questionnaire Review

⊞ Step History ⊞ Step Comments SME step comments report

	Candidate	Person ID	Master Profile	Disposition	Cumulative Score	SME	Email Notify	Source	Received	Notices	Audit Trail	Unsubscribed
☐	Whitney, Jan	38810705	View	• Fail - 0.00%	0.00%		•	Paper	04/19/19 09:16 AM	N/A	View	

1 Record Found Page: 1 of 1

Email Notify | All | Go

⊞ Step 3 :SME Review

6. A default message has already been created to notify applicants of their failure to meet minimum qualifications. From the Template drop down menu, select the template named Statewide Minimum Qualification Notice.
7. Then click Generate Notices.

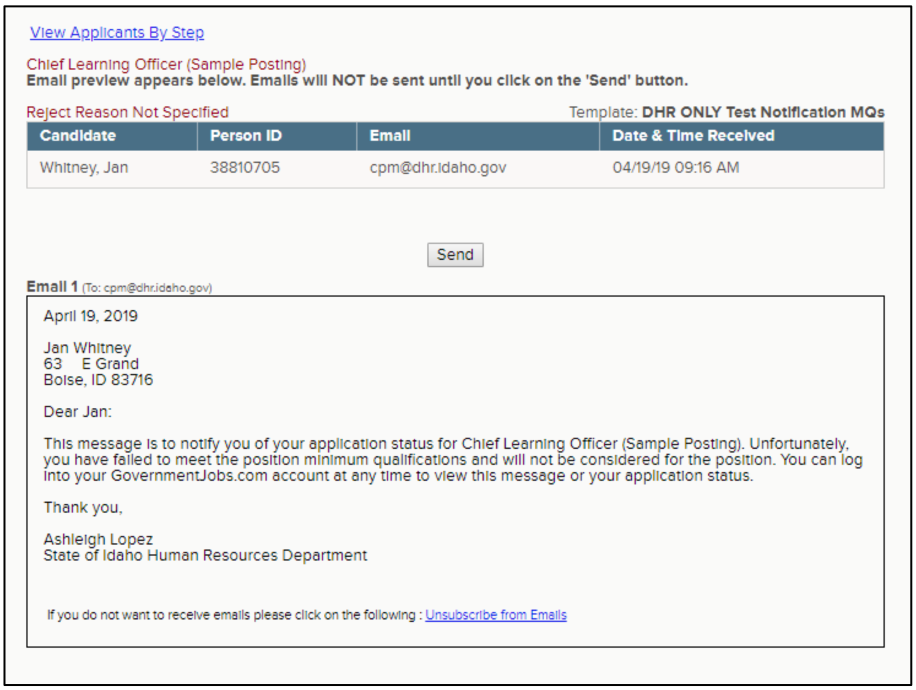
Select Email Format: HTML

Disposition: Rejection Reason Not Specified   Template: Statewide Minimum Qualification Notice   Edit Template

Candidate	Person ID	Email	Date & Time Received
Whitney, Jan	38810705	cpm@dhr.idaho.gov	04/19/19 09:16 AM

Generate Notices

8. A preview of the message(s) will display for your verification. Click Send to send the notices to each applicant.

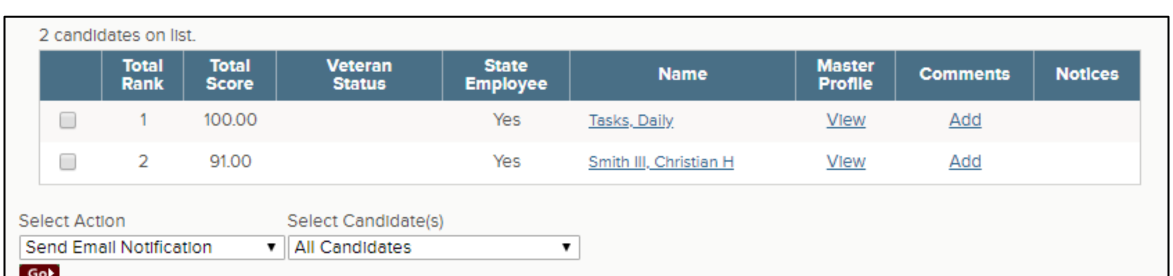


9. If you have multiple evaluation steps with failed applicants, repeat steps 1-9 for each.

Applicants Placed on Eligible List

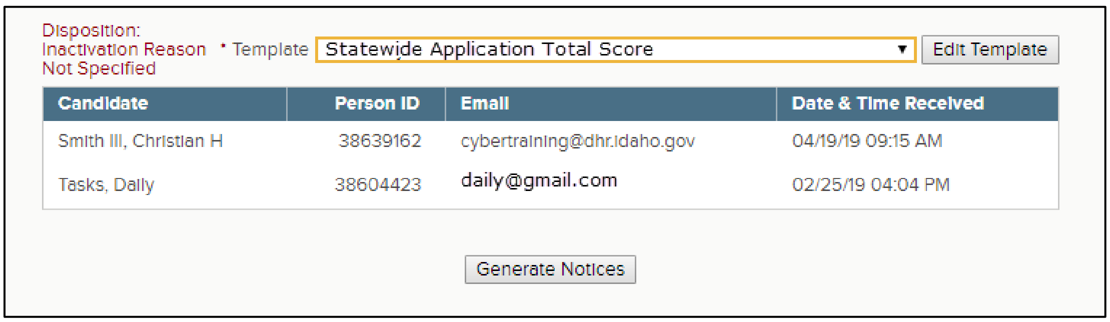
1. Next, notify applicants placed on the eligible list of their total score. Click on View Candidates in the Eligible List section of the recruiting file.

2. In the Select Action drop down, choose Send Email Notification.
3. In the Select Candidate(s) drop down, choose All Candidates.
4. Then click on Go.



5. In the Template drop down, choose Statewide Application Total Score Notice. (**NOTE**: If your evaluation steps are a pass/fail only and the Total Score column on your eligible list reflects 0.00 for your applicants, you need to use the template Statewide Application Status Notice.)

6. Then click Generate Notices.

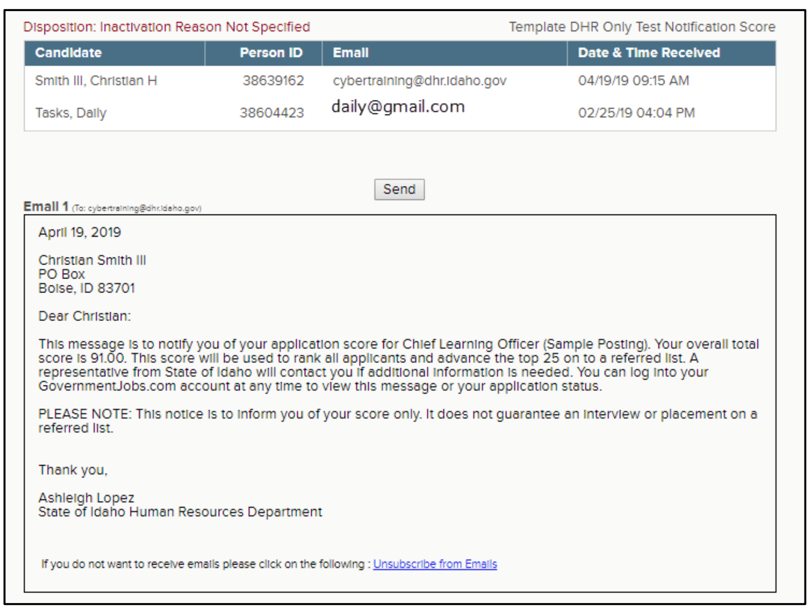


Disposition:
Inactivation Reason Not Specified · Template: Statewide Application Total Score · Edit Template

Candidate	Person ID	Email	Date & Time Received
Smith III, Christian H	38639162	cybertraining@dhr.idaho.gov	04/19/19 09:15 AM
Tasks, Daily	38604423	daily@gmail.com	02/25/19 04:04 PM

Generate Notices

7. A preview of the message(s) will display for your verification.



Disposition: Inactivation Reason Not Specified · Template DHR Only Test Notification Score

Candidate	Person ID	Email	Date & Time Received
Smith III, Christian H	38639162	cybertraining@dhr.idaho.gov	04/19/19 09:15 AM
Tasks, Daily	38604423	daily@gmail.com	02/25/19 04:04 PM

Send

Email 1 (To: cybertraining@dhr.idaho.gov)

April 19, 2019

Christian Smith III
PO Box
Boise, ID 83701

Dear Christian:

This message is to notify you of your application score for Chief Learning Officer (Sample Posting). Your overall total score is 91.00. This score will be used to rank all applicants and advance the top 25 on to a referred list. A representative from State of Idaho will contact you if additional information is needed. You can log into your GovernmentJobs.com account at any time to view this message or your application status.

PLEASE NOTE: This notice is to inform you of your score only. It does not guarantee an interview or placement on a referred list.

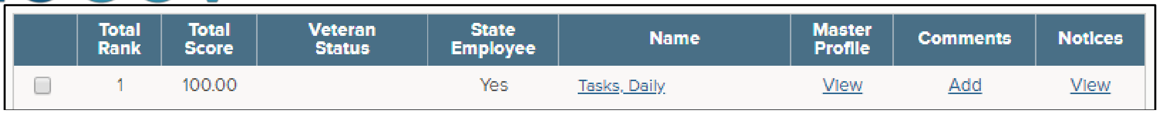
Thank you,

Ashleigh Lopez
State of Idaho Human Resources Department

If you do not want to receive emails please click on the following : Unsubscribe from Emails

8. Click Send to send the notices to each applicant.

9. You can review notices sent to applicants by clicking View under the Notices column.



	Total Rank	Total Score	Veteran Status	State Employee	Name	Master Profile	Comments	Notices
☐	1	100.00		Yes	Tasks, Daily	View	Add	View

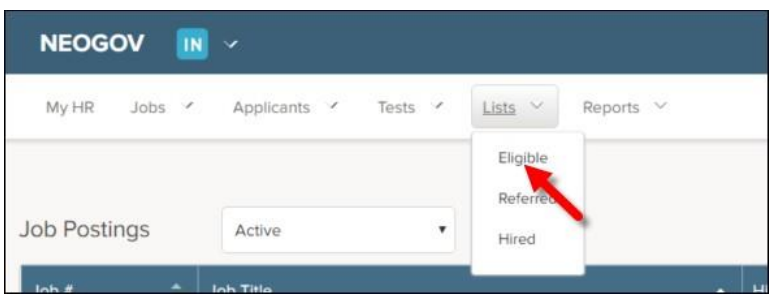
Create a Referred List

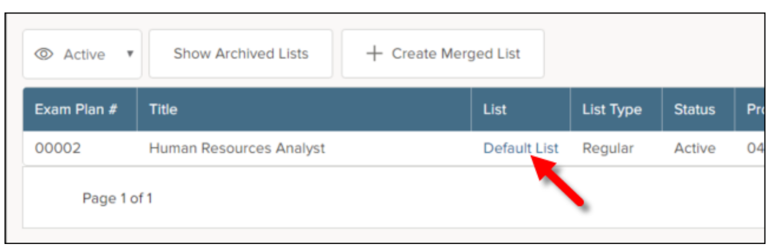
In the previous section, you placed all candidates that passed the minimum qualifications review step and any additional evaluation steps on an eligible list and notified them of their application score/status. You will now refer these same candidates to the hiring department. This referral action creates a referred list. Once the referred list is created the hiring manager can begin reviewing applications, scheduling candidates for hiring interviews, and eventually hire the ideal candidate.

Steps to Create a Referred List

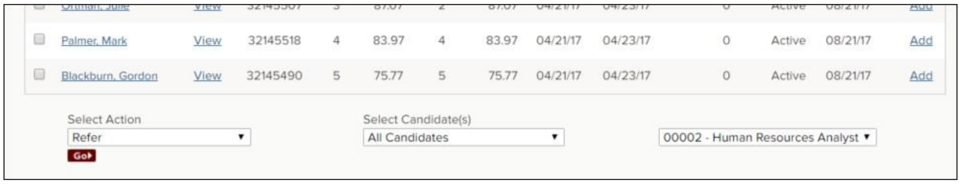
1. If you're not already viewing your eligible list, return back. You have a couple of ways to get there: (1) return to your Recruiting File and click View Candidates from the Eligible Lists section, or (2) click Eligible on the Lists menu and then click the list name from the List column.

or

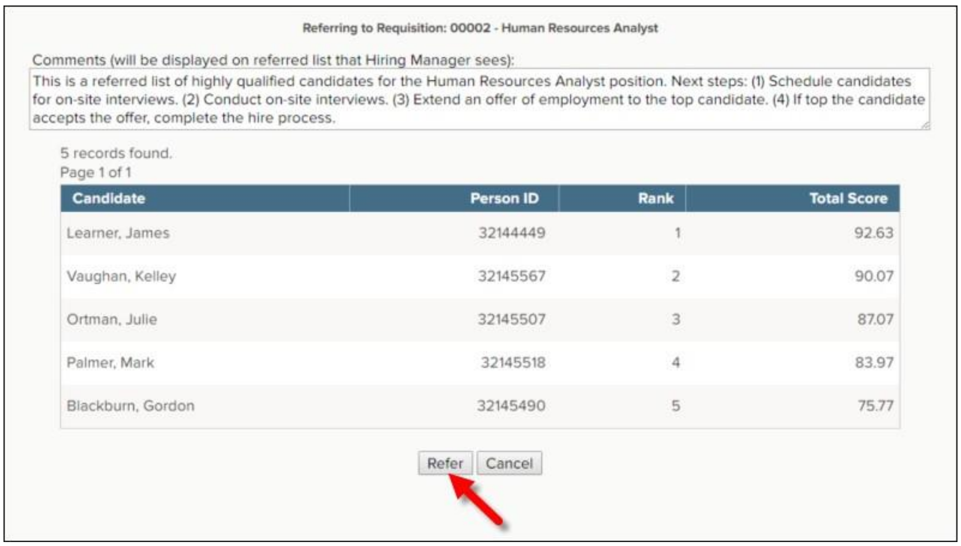




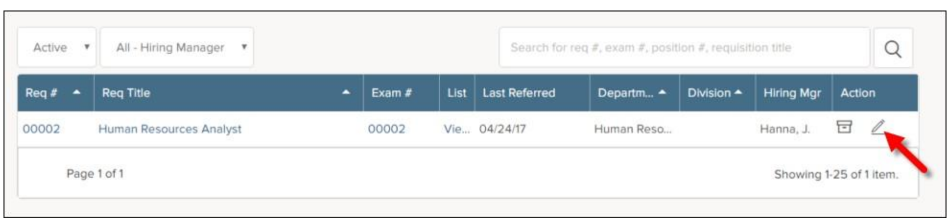
2. To create a referred list, select the top 25 candidates, choose Refer from the Select Action pulldown, choose Selected Candidates from the Select Candidate(s) pulldown, select your open requisition from the Select Requisition pulldown and click Go.



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



4. From the Action column click the Edit icon. It looks like a pencil.



5. The Edit Referred List page will display.

6. Complete the form using the table below.

* Required

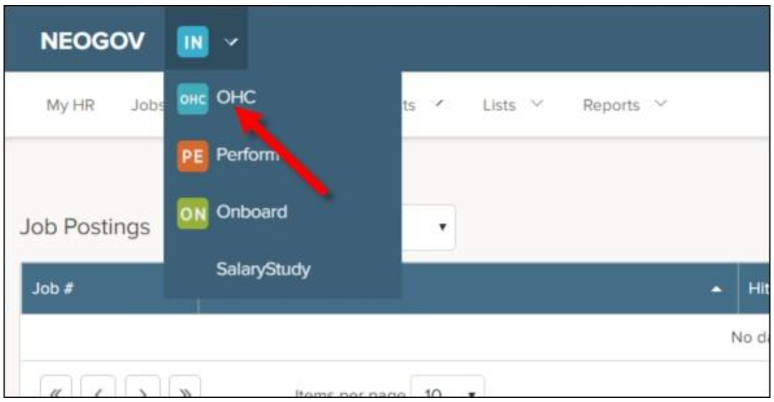
Field	What to Enter
Display Candidate Status As	This message will display to candidates who sign back into Career Pages to see their current application status. Enter “Referred to Hiring Manager”.
Referred List Inactivity Notice	An email notification will be sent to the assigned analyst if the assigned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

7. Click Save once you’re done.

Module 8: Complete Interview and Hiring Tasks

Steps to Complete Interview and Hiring Tasks

1. For this training module, you will impersonate the role of the hiring manager to complete interview and hiring tasks from the OHC. This will give you a real-world perspective; seeing what your hiring managers will see. If you're not already in the OHC, return back. On the NEOGOV Product menu, click OHC.



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

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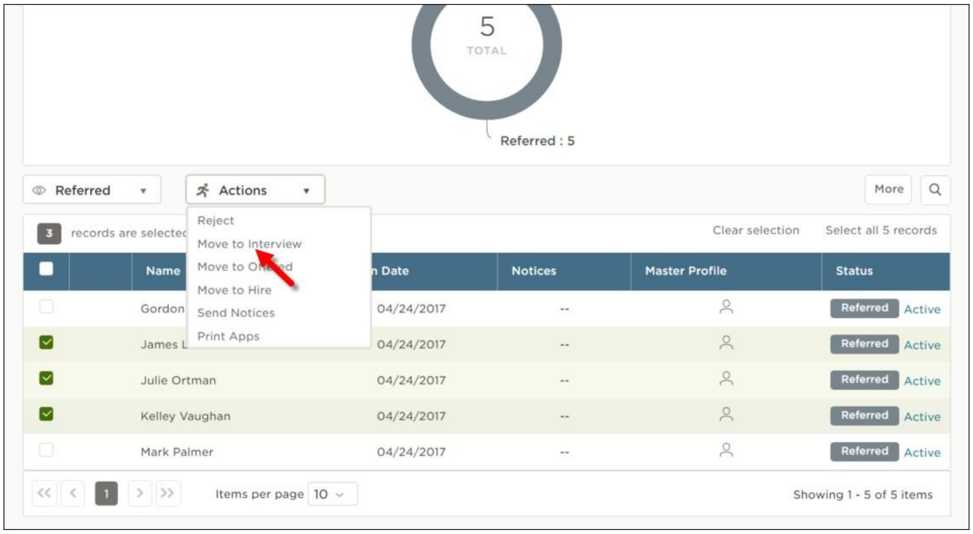
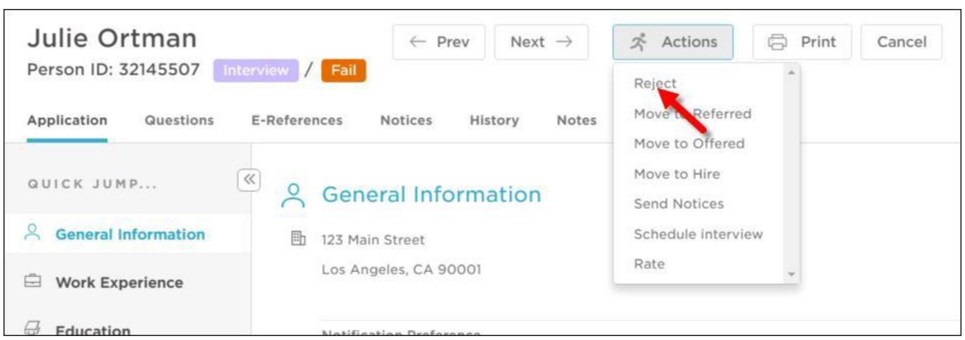
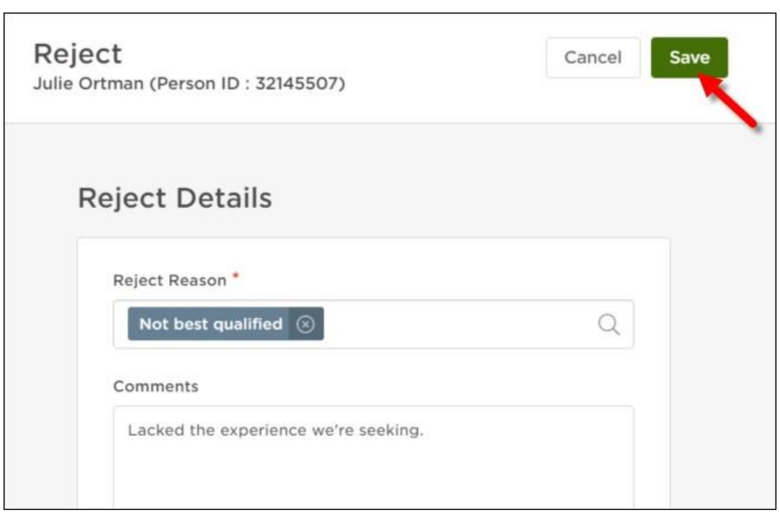
3. Select the candidates you want to interview. Next, on the Actions menu, click Move to Interview and then click OK to confirm.



4. For applicants you choose not to interview, or who fail after the interview, click the box next to their name, on the Actions menu, click Reject.

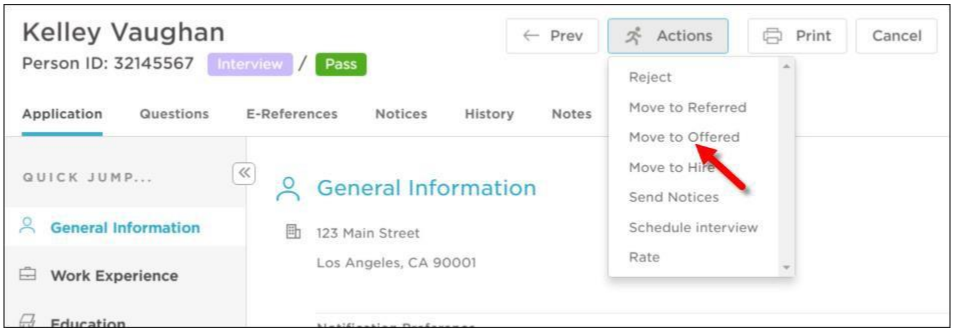


5. The reject form will display. From the Reject Reason field, select the applicable reject reason, enter any comments and click Save.

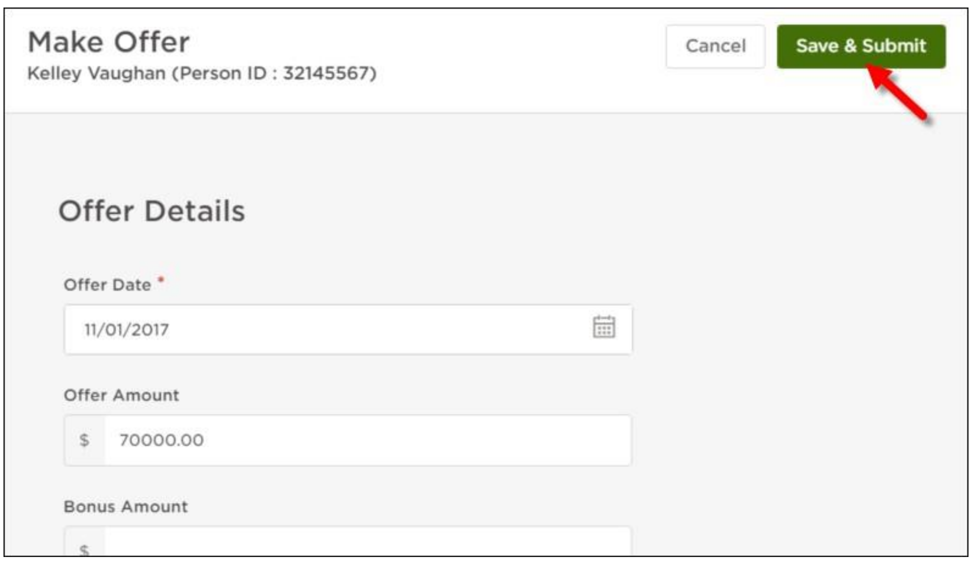


6. Click Cancel or anywhere to the left of the candidate's application to return back to your assigned referred list.

7. Click the candidate that will be offered the position. On the Actions menu, click Move to Offered.



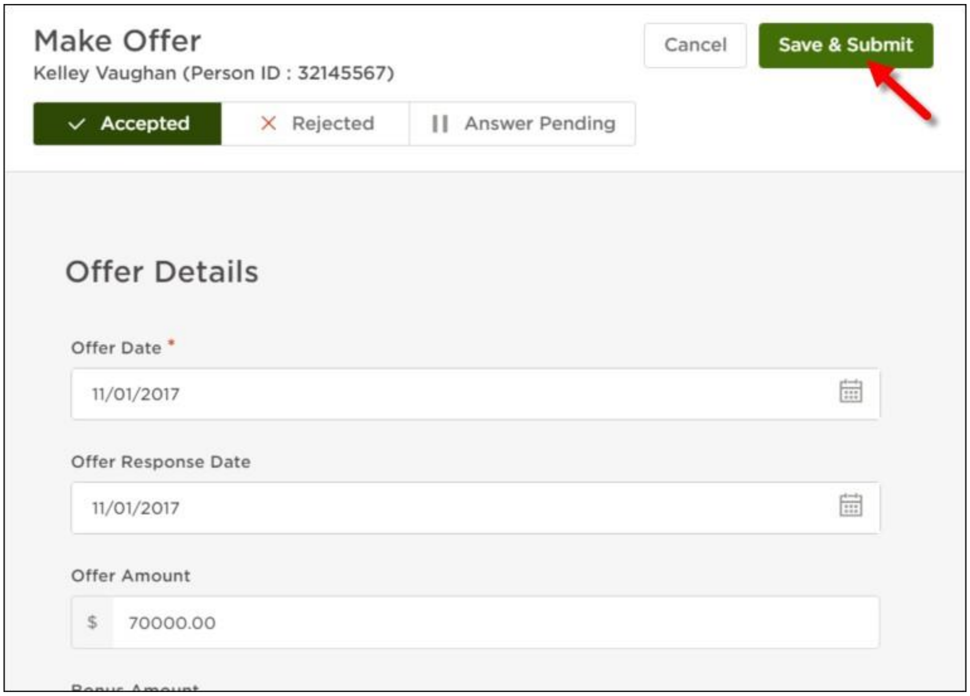
8. The Offer Details page will display. Complete the form and then click Save & Submit.



9. Click Cancel or anywhere to the left of the candidate's application to return back to your assigned referred list.

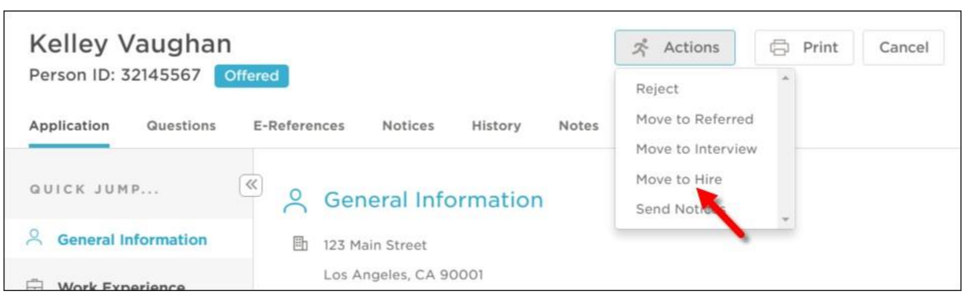
10. The candidate has accepted your offer of employment. You can track this event now. From the Status column, click Pending.

11. Click Edit and click Accepted. From the Offer Response Date field, enter a date and then click Save & Submit.

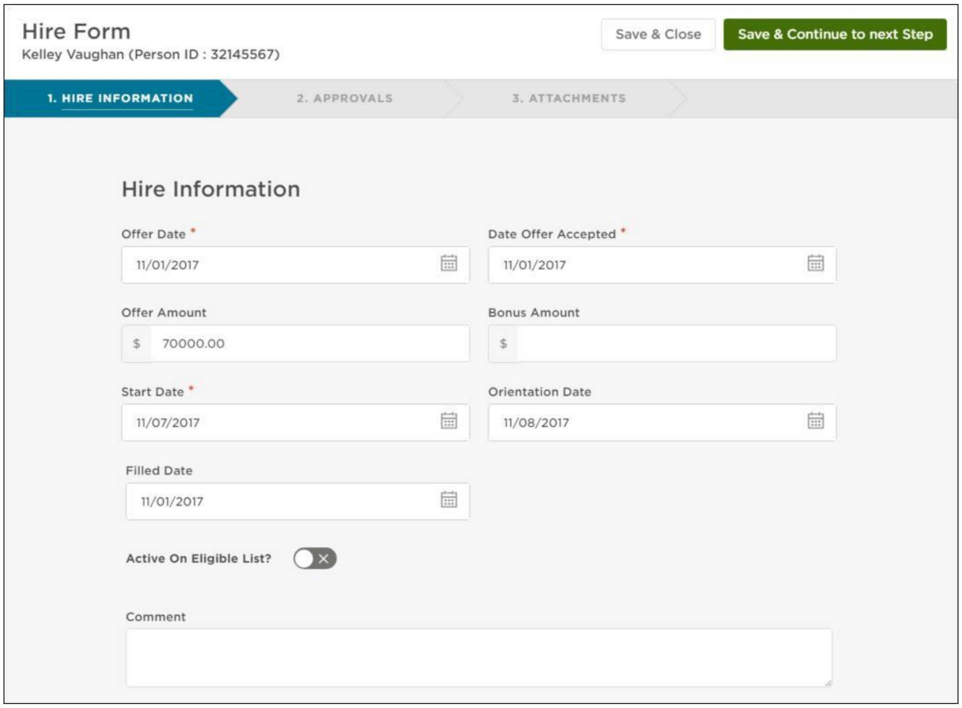


12. Click Cancel or anywhere to the left of the candidate's application to return back to your assigned referred list.

13. Click the candidate that just accepted your offer of employment to start the hire process. On the Actions menu, click Move to Hire.



14. The hire form will display.



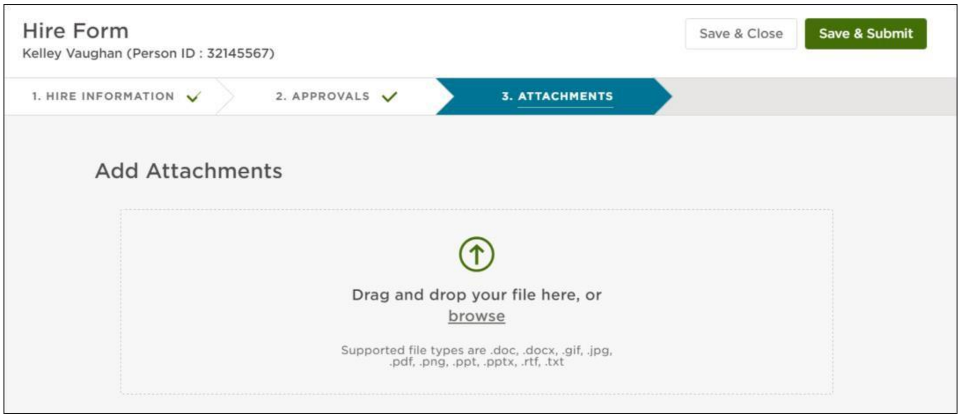
15. Complete the form using the table below.

* Required

Field	What to Enter
* Offer Date	The offer date will pre-complete from the previously completed offer.
* Date Offer Accepted	The offer accepted date will pre-complete from the previously completed offer.
Offer Amount	The offer amount will pre-complete from the previously completed offer.
Bonus Amount	The bonus amount, if any, will pre-complete from the previously completed offer.
* Start Date	Enter the first day of employment for hired candidate.
Orientation Date	Enter the orientation date for the hired candidate.
Filled Date	Enter the date of when the position vacancy is working fine is filled.
Custom Form Fields	If your Insight Administrator has created custom form fields they will display after the Filled Date field. If applicable, complete these remaining fields
Active On Eligible List?	Leave this field switched off for this training module.
Comment	Enter any additional information about the new hire in this field.

16. Once you're done, click Save & Continue to Next Step. The Approval Workflow page will display.

17. Click Save & Continue to Next Step. The Add Attachments page will display.

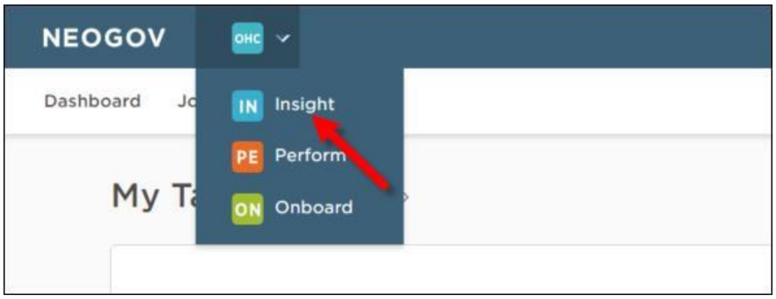


18. Click Save & Submit.

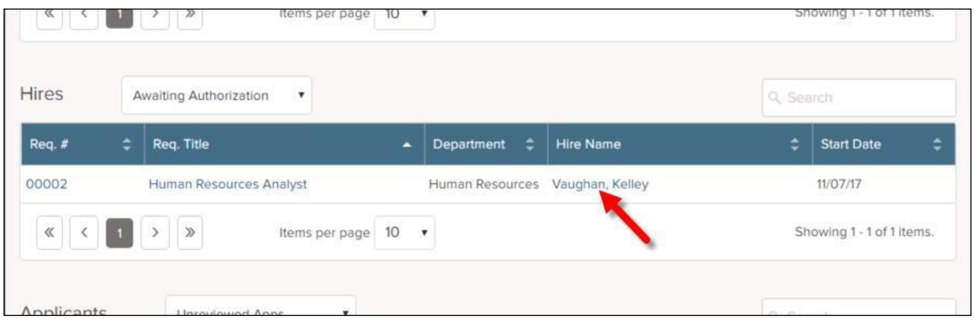
Module 9: Authorize a New Hire and Fill a Requisition

Steps to Authorize a New Hire and Fill a Requisition

1. For this training module, you will be performing two close out tasks: authorizing the new hire and filling the requisition. If you're not already in Insight, return back. On the NEOGOV Product menu, click Insight.

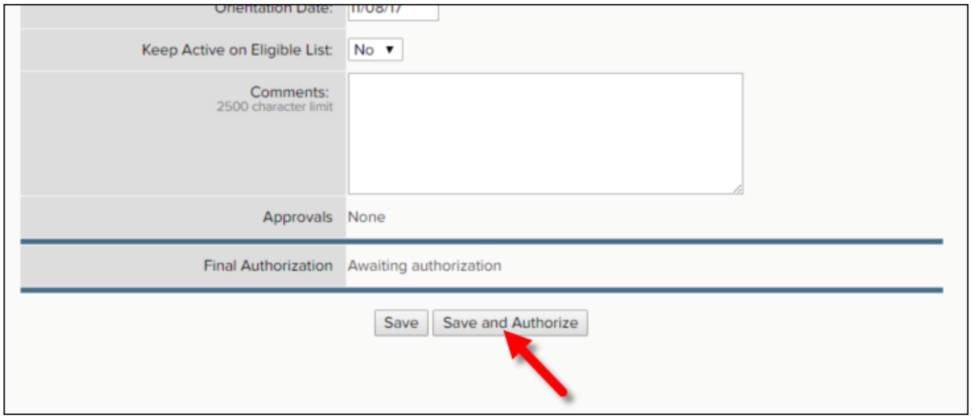


2. The recently-hired candidate displays from the Hires section on your My HR page. Click the name of the candidate.

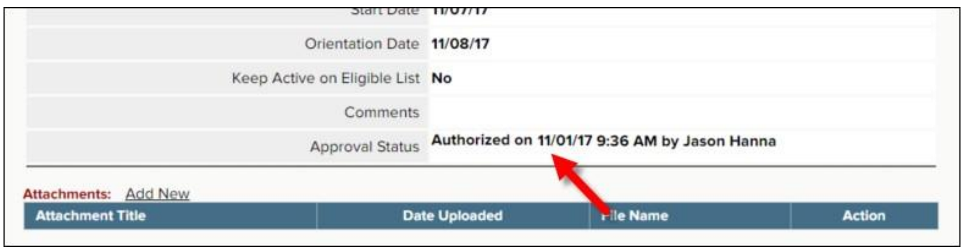


3. The personnel action form will display. Review the form and then click Edit to start the authorization process.

4. Click Save and Authorize.



5. An approval confirmation will display.



6. Now it's time to change the requisition's status from open to filled. Return back to your Recruiting File. Click the exam number from the My HR page, or, on the Jobs menu, click Recruiting Files and then click the job title from the Recruiting File column.

7. From the Requisitions section, click Authorize.

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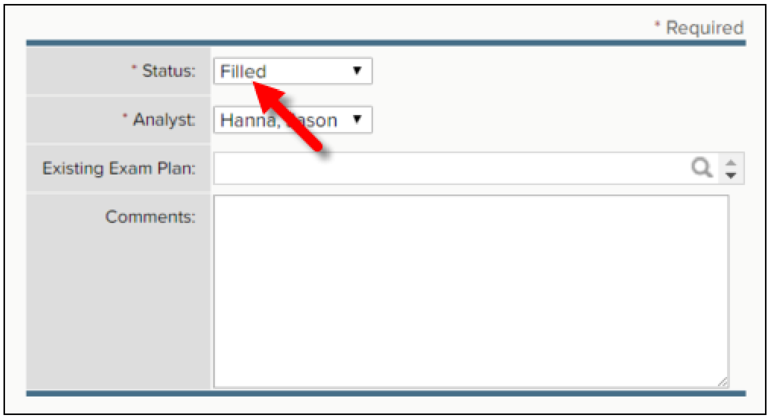
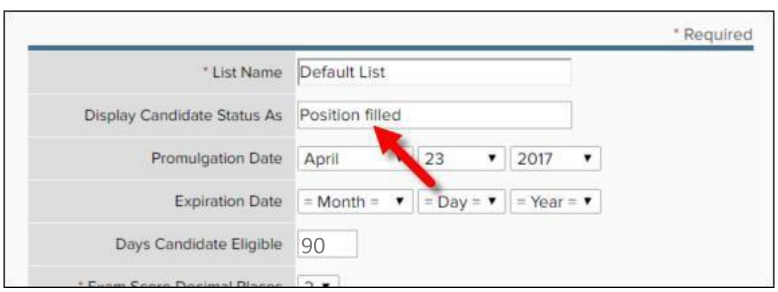
8. Select Filled from the Status pulldown.



9. Once you're done, click Save.

10. The last few steps involve updating the candidate status messages for both eligible and referred lists. From the Eligible Lists section, click Edit.

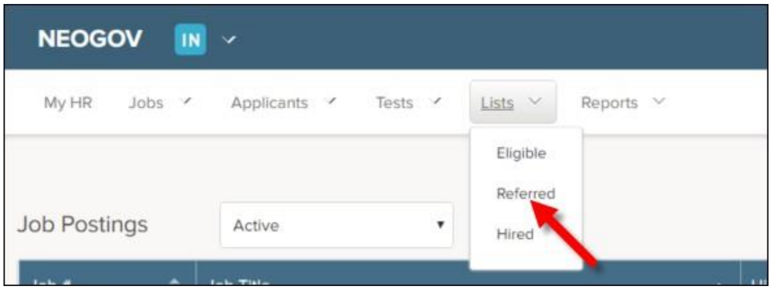
11. Change the Display Candidate Status As field value to, "Position filled," or something similar and set the days candidate eligible to 90 days.



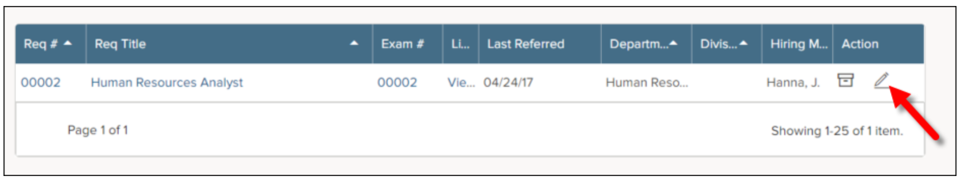
90

12. Once you're done, click Save.

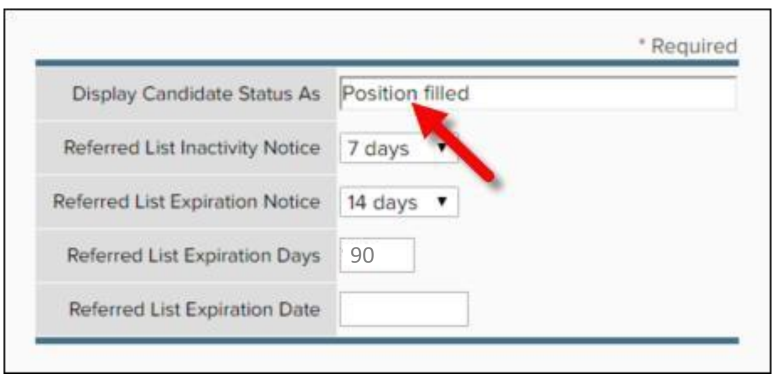
13. Now on to update the same field for the referred list. Click Referred on the Lists menu. Search for and find your referred list.



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



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



16. Once you’re done, click Save.

When a hire is made recruiting files and referred lists can be archived to clear up dashboard views. Archived information can always be viewed at a later time.

For additional training please visit the NEOGOV community. To access, login to NEOGOV, hover over your name in the top right, go to Help & Training, Products, Insight Training.