

NEOGOV INSIGHT

Training Module Guide

Modified to meet the State of Idaho's hiring process

Table of Contents

Introduction	4
Module 1: Create a Requisition	4
Steps to Create a Requisition	5
Module 2: Authorize a Requisition and Create a Recruiting File	8
Steps to Authorize a Requisition	8
Steps to Create a Recruiting File	10
What is a Recruiting File?	12
Module 3: Create a Job Posting	14
Steps to Create a Job Posting	14
Create Job-Specific Supplemental Questions	19
Steps to Create Job-Specific Supplemental Questions	19
Steps to Publishing the Job Posting on the Web	23
Module 4: Create Evaluation Steps	24
Important Note Regarding Evaluation Steps	24
Evaluation Step: Supplemental Questionnaire	24
Create a scoring plan	24
Scenario 2: Multiple Choice Questions that Award Points	27
Create a scoring plan	27
Create a supplemental questionnaire evaluation step	28
Evaluation Step: Rating Matrix Review (Scoring Narrative Responses with a SME)	31
Steps to Complete a Rating Matrix Evaluation	31
Module 5: Evaluate Candidates	34
Steps to Evaluate Candidates	34
Auto-Scoring	35
Rating Matrix- SME Review	36

NEOGOV

Module 7: Refer Candidates to the Hiring Manager.....	38
Steps to Place Candidates on an Eligible List	38
Notifying Applicants of their Total Overall Scores/Status	41
Create a Referred List	44
Steps to Create a Referred List	44
Module 8: Complete Interview and Hiring Tasks.....	47
Steps to Complete Interview and Hiring Tasks	47
Module 9: Authorize a New Hire and Fill a Requisition	53
Steps to Authorize a New Hire and Fill a Requisition	53

Training Module Guide

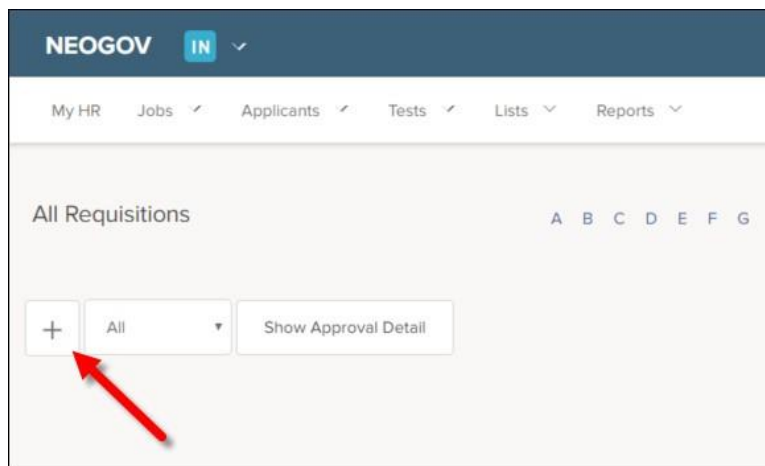
Introduction

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

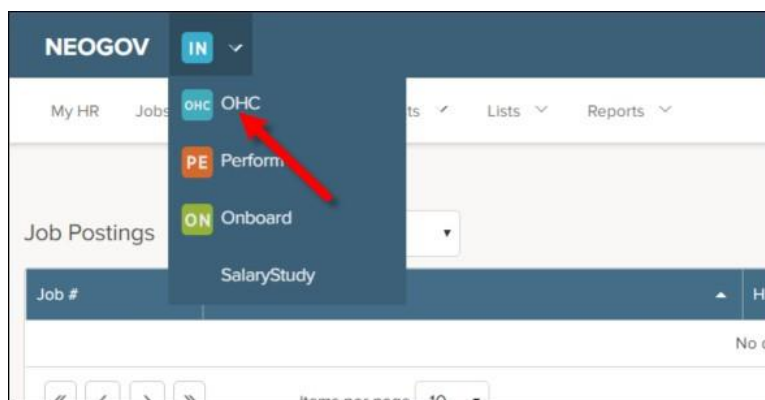
Module 1: Create a Requisition

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.

Raters, SMEs and Approvers

Hiring Managers

Originators and HR Liaisons

The screenshot displays the OHC dashboard interface. It is divided into three main sections: 'My Tasks', 'My Candidates', and 'My Requisitions'. The 'My Tasks' section shows a total of 2 tasks, with one 'Interview Setting' and one 'Requisition Approval'. The 'My Candidates' section lists two candidates: 'Administrative Assistant' and 'Database Administrator'. The 'My Requisitions' section shows a total of 3 requisitions, with one 'Draft', one 'In Progress', and one 'Approved'. The 'Approved' requisition is highlighted in green.

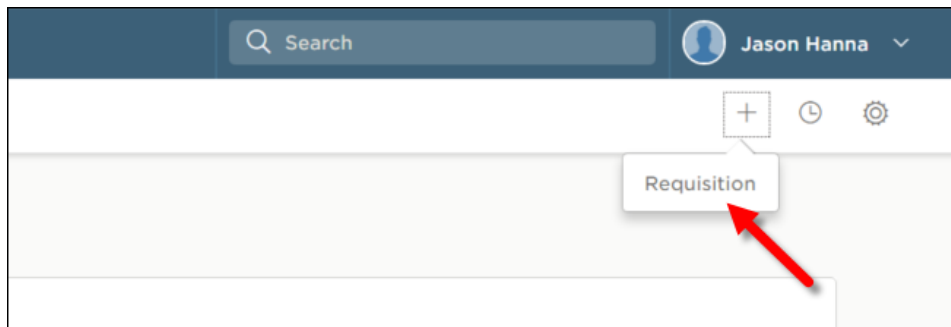
Type	Related To	Date Assigned	Department	Division
Approval	Customer Service Repr...	04/30/2016	Operations	Customer Success
Interview (6)	Sales Associate (0000...	05/03/2016	Sales and Marketing	State and Large Agency Sales

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

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

Steps to Create a Requisition

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



2. The requisition form will display.

Create Requisition

Cancel Save & Close Save & Continue to Next Step

1. CREATE 2. APPROVALS 3. ATTACHMENTS

Requisition Details

Requisition # [Assigned when requisition is saved]	Department/Division * Human Resources
Class Spec * Human Resources Analyst (1001)	Working Title Human Resources Analyst
Desired Start Date 11/01/2017	Hiring Manager * Jason Hanna Find a hiring manager
Job Type Full Time	List Type Regular
Number of Vacancies 1	

Position Details

New Position?
 Yes No

Position # * 000364	Vacancy Date 11/01/2017
First Name Sally	Last Name Smith

Delete

+ Add Position Detail

Comment

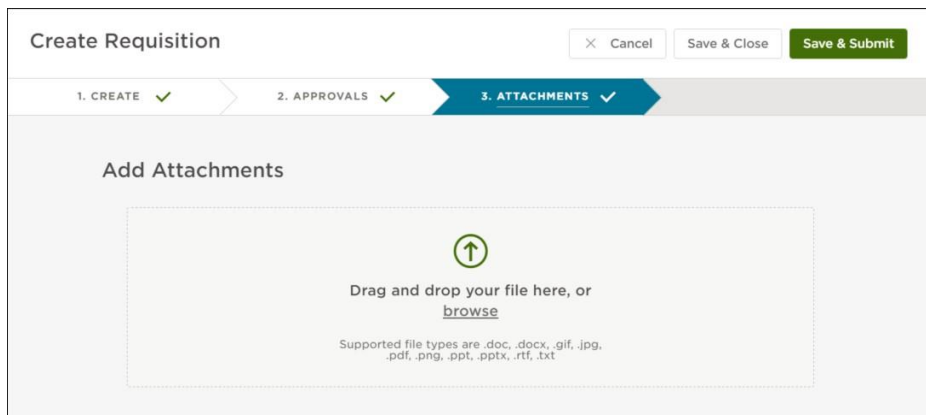
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3. Complete the form using the table below.

* 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 identified.
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.

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

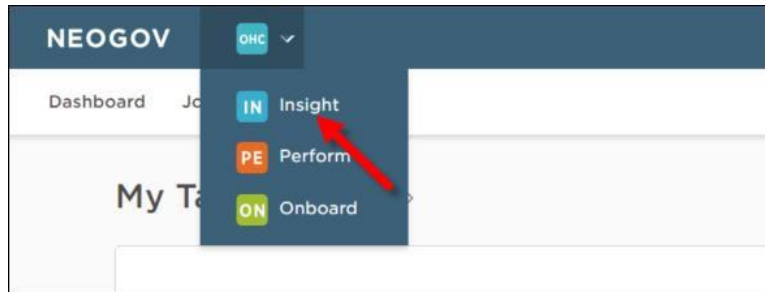


- Click Save & Submit.

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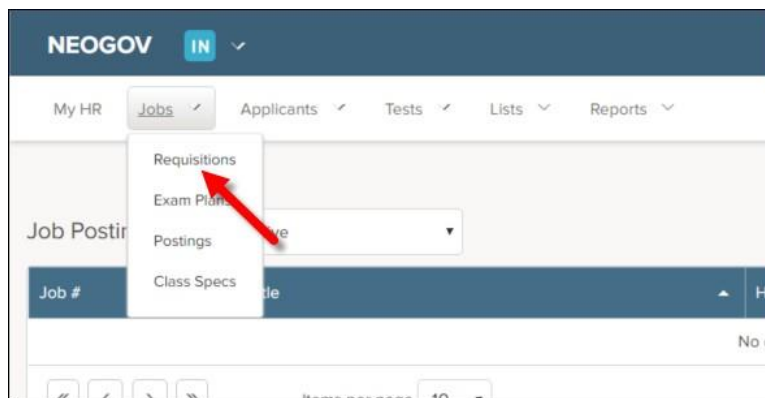
Module 2: Authorize a Requisition and Create a Recruiting File

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.



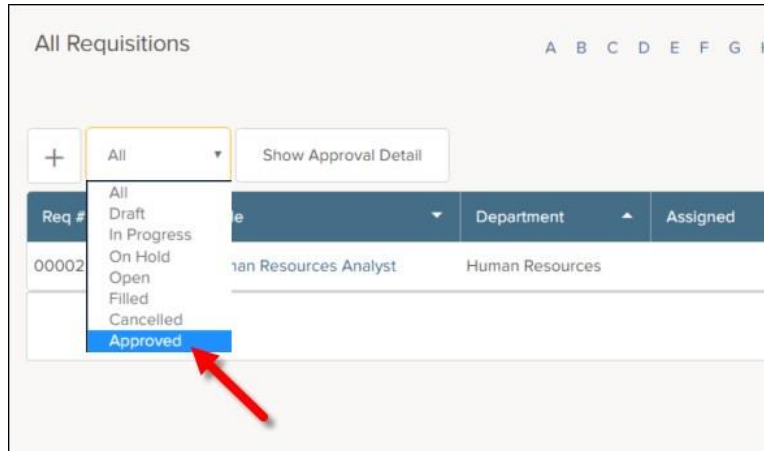
Steps to Authorize a Requisition

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.

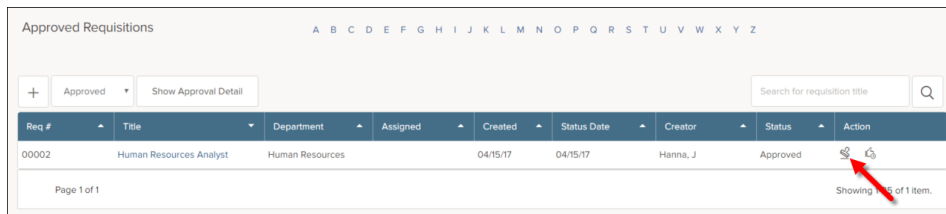


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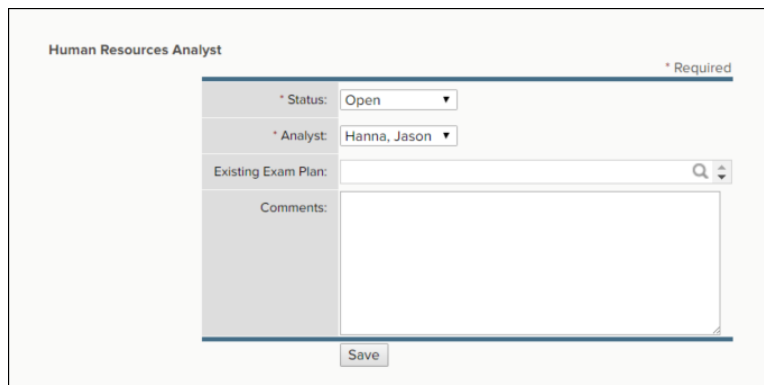
- The first view that displays is all requisitions. This listing will grow over time, so using the Status pulldown will help you quickly find requisitions. Any new requisition that has been routed to HR to start the recruitment process will have the Status field set to Approved. On the Status pulldown,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



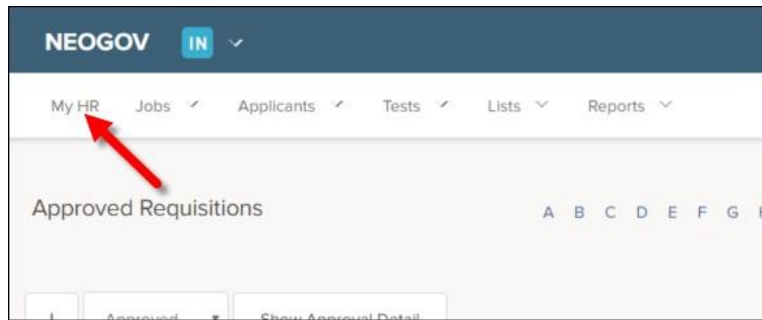
- Locate your recently-created requisition. From the Action column, click the Authorize icon. It looks like a rubber stamp.



- 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.



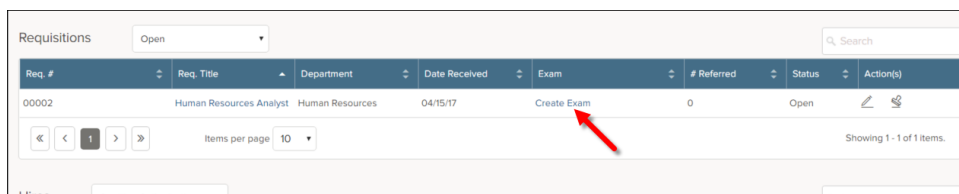
5. Click Save and then click My HR to return to your Insight dashboard.



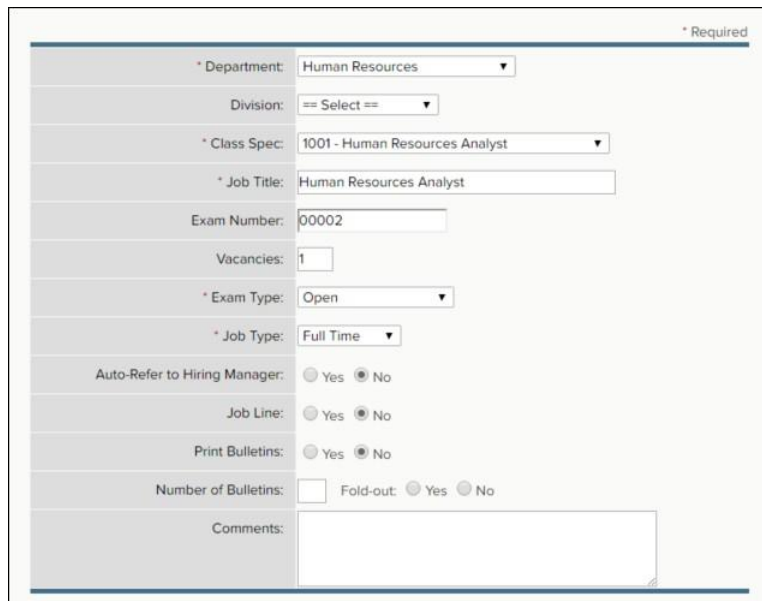
6. The requisition displays from your My HR page, Requisitions section, as you are now the assigned analyst. From the Exam column a Create Exam link is available. Once the Recruiting File is created this will be replaced with a number for quick access to the Recruiting File.

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.

A screenshot of a form titled 'Recruiting File' with a '* Required' label at the top right. The form contains several fields and options:

- * Department: Human Resources (dropdown)
- Division: == Select == (dropdown)
- * Class Spec: 1001 - Human Resources Analyst (dropdown)
- * Job Title: Human Resources Analyst (text input)
- Exam Number: 00002 (text input)
- Vacancies: 1 (text input)
- * Exam Type: Open (dropdown)
- * Job Type: Full Time (dropdown)
- Auto-Refer to Hiring Manager: Yes (radio), No (radio)
- Job Line: Yes (radio), No (radio)
- Print Bulletins: Yes (radio), No (radio)
- Number of Bulletins: (text input) Fold-out: Yes (radio), No (radio)
- Comments: (text area)

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.

Exam Title		Human Resources Analyst	Department		Human Resources
Exam Number		00002	Division		
			Vacancies		1
Edit Exam Plan Audit Trail					
Job Posting Add New					
Job #	Job Title	Status	Last Updated	Assigned To	
Recruiting Plan Add New					
Ad Type	Ad Name	Requested Date	Start Date	End Date	Action
Evaluation Steps Add Step View Applicants (0) View Applicants by Step (0) App Flow Print Apps					
Step	Evaluation Step	Weight	Results	At Step	Action
Advanced Filters Add Evaluation Step Filter Add Eligible List Filter					
Title	Created By	Filter Type		Action	
Eligible Lists Add New Show Archived Eligible Lists					
List Name	List Type	Expiration Date	# On List Total	# On List Active	Action
Default List	Regular	N/A	0	0	Edit View Candidates Audit Trail
Requisitions Add New					
Req #	Title	Department	Date Created	Action	
00002	Human Resources Analyst	Human Resources	04/15/2017	Edit Authorize Disassociate Referrals	
Tasks Add New					
Subject	Status	Priority	Due Date	Assigned To	Action
Notes Add New					
Note Title	Note	Last Updated	Note Owner	Action	
Files Add New					
Attachment Title	Date Uploaded	File Name	Action		

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.

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) Q

Division: Q

* Class Spec: Human Resources Analyst (100f) Q

* Job Title: Human Resources Analyst

* Job Number: 00002

* Job Type: Full Time v

* Job List: Default Job Listing v

* Exam Type: Open v

* Advertise From: 04/04/2017

* Advertise To: 04/18/2017 11 pm v :59 v

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

Unselected

- Accounting and Finance
- Administration
- Administrative Assistant
- Agriculture
- Airports

Selected

- Human Resources

* Location On Job: 100 State Street, Grand City Q

* Application Template: Default Q

* Reapply Period (Days): 1

* Assigned To: Hanna, Jason Q

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Description: 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.

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.

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.

- Once you're done, click Save.

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 where 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.



00002 Human Resources Analyst

[Item Bank](#) | [Scoring Plan](#)
* Required

* Question

Question Code
This field must be unique.

Text Answer | Select From Choices Answer | Yes/No Answer

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



Type	Item	Basket
0 items in the basket.		

[Show All Items](#)

[Add New Item](#)

ABCDEFGHIJKLMNOPQRSTUVWXYZ

Search for question(s):

3. The item form will display.

* Question	How many years of professional-level work experience do you have as a Human Resources Analyst?																										
* Category	Human Resources																										
* Type	Summary of Work Experience																										
* Response Format	<input type="radio"/> Text Answer <input checked="" type="radio"/> Select From Choices Answer <input type="radio"/> Yes/No Answer																										
* Input Type	Radio																										
* Response Options	<p>When you choose the "Select From Choices" response format, you need to provide several response options from which job seekers can choose.</p> <p>To enter the options use a text box displayed below.</p> <table border="1"> <thead> <tr> <th>Internal Code</th> <th>Response Option</th> <th>Points</th> <th>Sort</th> </tr> </thead> <tbody> <tr> <td>None</td> <td>No experience</td> <td>0</td> <td>▲▼ DELETE</td> </tr> <tr> <td>Less1</td> <td>Less than 1 year</td> <td>70</td> <td>▲▼ DELETE</td> </tr> <tr> <td>1to2</td> <td>1 year to less than 2 years</td> <td>85</td> <td>▲▼ DELETE</td> </tr> <tr> <td>2to3</td> <td>2 years to less than 3 years</td> <td>100</td> <td>▲▼ DELETE</td> </tr> <tr> <td>3more</td> <td>3 or more years</td> <td>100</td> <td>▲▼ DELETE</td> </tr> </tbody> </table> <p>Add Option</p>			Internal Code	Response Option	Points	Sort	None	No experience	0	▲▼ DELETE	Less1	Less than 1 year	70	▲▼ DELETE	1to2	1 year to less than 2 years	85	▲▼ DELETE	2to3	2 years to less than 3 years	100	▲▼ DELETE	3more	3 or more years	100	▲▼ DELETE
Internal Code	Response Option	Points	Sort																								
None	No experience	0	▲▼ DELETE																								
Less1	Less than 1 year	70	▲▼ DELETE																								
1to2	1 year to less than 2 years	85	▲▼ DELETE																								
2to3	2 years to less than 3 years	100	▲▼ DELETE																								
3more	3 or more years	100	▲▼ DELETE																								
* Required Question	Yes																										
Confidential	<input type="checkbox"/> Check here if this question is confidential.																										

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.

Page 1 of 1

Type	Item	Basket	Action
Education	Do you have a Bachelor's Degree in Human Resources, Industrial Relations, Public Administration, Business Administration, or a closely related field?	Add	Edit Delete Copy
Summary of Work Experience	How many years of professional-level work experience do you have as a Human Resources Analyst?	Add	Edit Delete Copy

Page 1 of 1



6. Repeat steps 2-5 to add more questions.

*If you want to use existing question in the item bank, 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.

Type	Item	Basket
2 items in the basket.		Checkout
Education	Do you have a Bachelor's Degree in Human Resources...	Remove
Summary of Work Expe...	How many years of professional-level work experien...	Remove

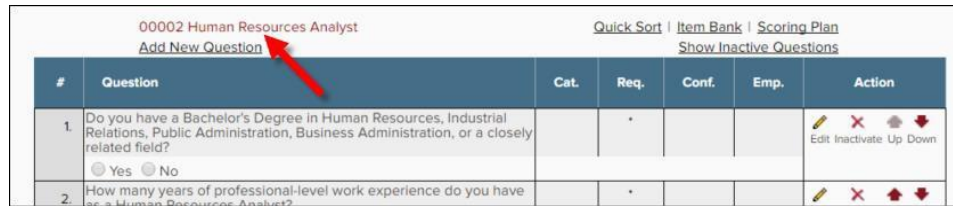
8. Click the up and down arrows to arrange questions in the proper order.

00002 Human Resources Analyst		Quick Sort Item Bank Scoring Plan				
Add New Question		Show Inactive Questions				
#	Question	Cat.	Req.	Conf.	Emp.	Action
1.	How many years of professional-level work experience do you have as a Human Resources Analyst? <input type="radio"/> No experience <input type="radio"/> Less than 1 year <input type="radio"/> 1 year to less than 2 years <input type="radio"/> 2 years to less than 3 years <input type="radio"/> 3 or more years		*			Edit Inactivate Up Down
2.	Do you have a Bachelor's Degree in Human Resources, Industrial Relations, Public Administration, Business Administration, or a closely related field? <input type="radio"/> Yes <input type="radio"/> No		*			Edit Inactivate Up Down
3.	Please enter the exact field of your Bachelor's degree in the box below. If you do not have a Bachelor's degree, enter N/A. <input type="text"/>		*			Edit Inactivate Up Down

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

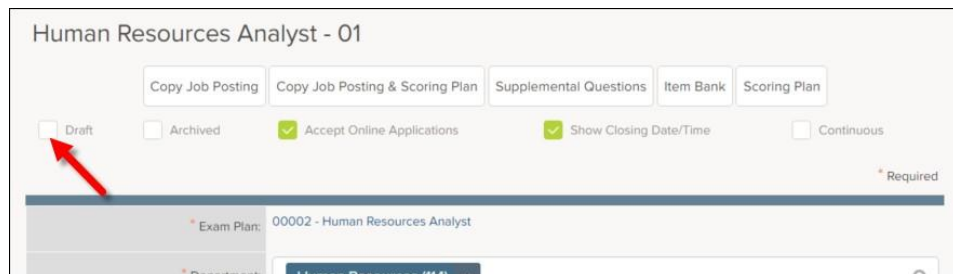
Steps to Publishing the Job Posting on the Web

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.



#	Question	Cat.	Req.	Conf.	Emp.	Action
1.	Do you have a Bachelor's Degree in Human Resources, Industrial Relations, Public Administration, Business Administration, or a closely related field? <input type="radio"/> Yes <input type="radio"/> No		*			 Edit Inactivate Up Down
2.	How many years of professional-level work experience do you have as a Human Resources Analyst?		*			

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



Human Resources Analyst - 01

Draft Archived Accept Online Applications Show Closing Date/Time Continuous

* Required

* Exam Plan: 00002 - Human Resources Analyst

* Department: Human Resources (114)

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>.

Module 4: Create Evaluation Steps

Important Note Regarding Evaluation Steps

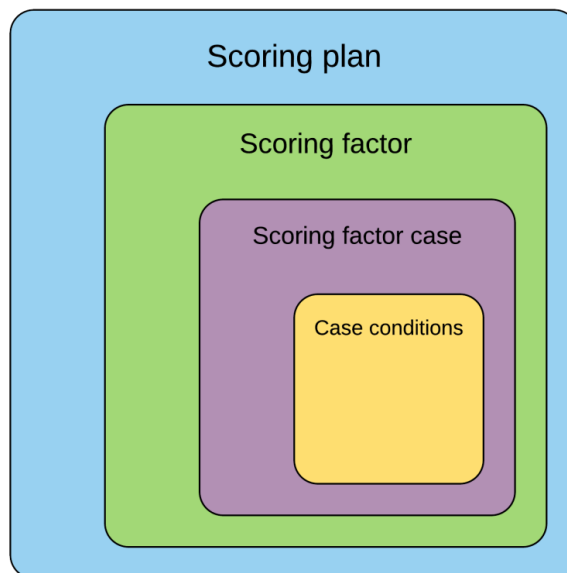
This training module series will feature the two most common evaluation step types: Supplemental Questionnaire and Rating Matrix.

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.

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 Title 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.

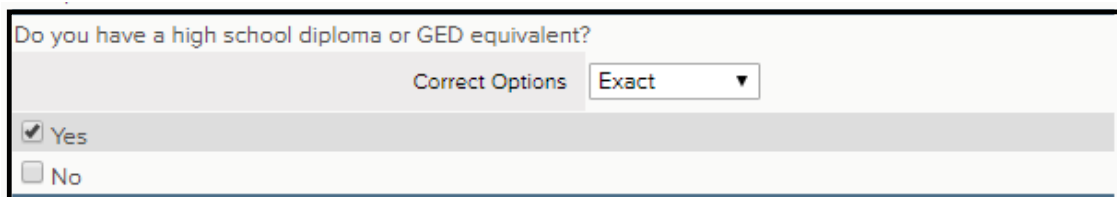
15. From the first job-specific supplemental question, click Add Condition.

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.

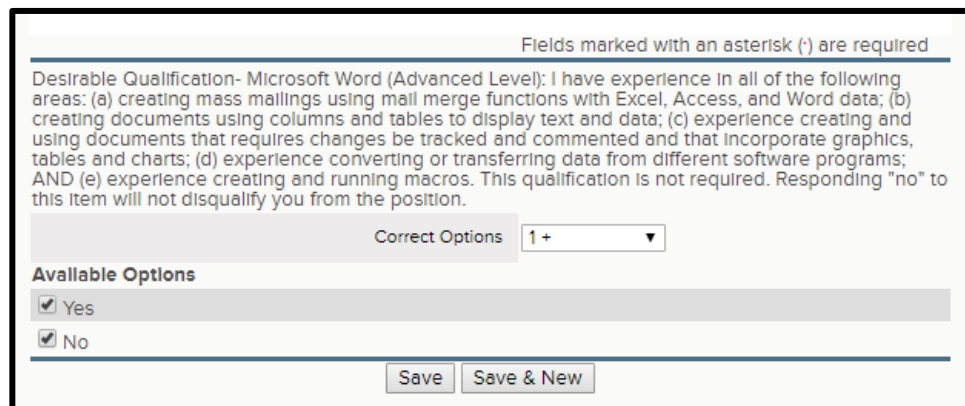
17. From the Correct Options field, select Exact.



The screenshot shows a configuration window for a question titled "Do you have a high school diploma or GED equivalent?". Below the title, there is a "Correct Options" dropdown menu set to "Exact". Underneath, there are two radio button options: "Yes" (which is selected) and "No".

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.



The screenshot shows a configuration window for a question titled "Desirable Qualification- Microsoft Word (Advanced Level): I have experience in all of the following areas: (a) creating mass mailings using mail merge functions with Excel, Access, and Word data; (b) creating documents using columns and tables to display text and data; (c) experience creating and using documents that requires changes be tracked and commented and that incorporate graphics, tables and charts; (d) experience converting or transferring data from different software programs; AND (e) experience creating and running macros. This qualification is not required. Responding 'no' to this item will not disqualify you from the position." Below the text, there is a "Correct Options" dropdown menu set to "1+". Underneath, there are two radio button options: "Yes" (which is selected) and "No" (which is also selected). At the bottom, there are "Save" and "Save & New" buttons.

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.

* Case Title	Two or more years experience and HS diploma or GED
<ans1>	Do you have a high school diploma or GED equivalent? Edit Delete
	<input checked="" type="checkbox"/> Yes
<ans2>	Do you have two or more years of clerical experience? Edit Delete
	<input checked="" type="checkbox"/> Yes
Formula	<ans1> AND <ans2>
Questions	

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.

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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.

* Factor Title	Desirable qualifications
* Type	<input type="radio"/> Pass/Fail <input checked="" type="radio"/> Scored
* Score Points From	<input checked="" type="radio"/> Supplemental Questions <input type="radio"/> Cases
* Factor Questions	<input checked="" type="checkbox"/> Which best describes your level of education? (Ranking Item) <input type="checkbox"/> Do you have a CPA license? (MQ Yes/No) <input checked="" type="checkbox"/> How many years of professional-level accounting experience do you have? (Ranking Item) <input checked="" type="checkbox"/> Which of the following best describes your Microsoft Excel proficiency level? (Ranking Item) <input checked="" type="checkbox"/> Which of the following best describes your Crystal Reports proficiency level? (Ranking Item)
Formula	<score>
Comments	

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.

Definition

A * Step Type	Supplemental Questionnaire ▾
B Step Name	Supplemental Questionnaire Review
C Display Candidate Status As	Supplemental Questionnaire Review
D Evaluate On <small>Changing step to Pass/Fail will delete all applicant scores.</small>	<input type="radio"/> Pass/Fail <input checked="" type="radio"/> Scored
E Applicant Status	<input type="radio"/> Do Not Show This Step <input checked="" type="radio"/> Show This Step
F	<input checked="" type="checkbox"/> Show Step Pass/Fail <input checked="" type="checkbox"/> Show Step Score <input checked="" type="checkbox"/> Show Step Disposition
Comments	<div style="border: 1px solid #ccc; height: 60px;"></div>
Cumulative Score	<input checked="" type="radio"/> Do Not Show Cumulative Score <input type="radio"/> Show Cumulative Score
Prerequisite Steps	<input checked="" type="checkbox"/> Application Received <input type="checkbox"/> Application Review

Scoring

G * Calculate Final Score Based On	<input type="radio"/> Rescaled Score <input checked="" type="radio"/> Percentage Score <input type="radio"/> Z-Score
H * Final Score Weight	50 % Max: 100.00%
* Calculated Score Decimal Places	2 ▾
I * Passing Score Percentage	0 %
J * Max Raw Score	200

Save Cancel

- 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.

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- 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.**

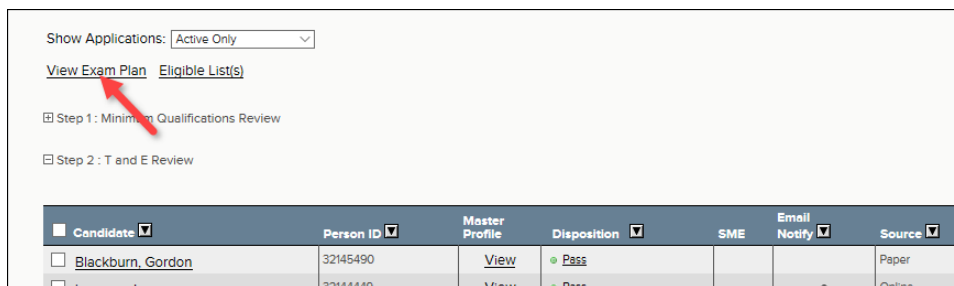
- 5. Once you're done, click Save.

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.

The screenshot shows the 'Evaluation Steps' section of the interface. At the top, there are several navigation links: 'Evaluation Steps', 'Add Step', 'View Applicants (1)', 'View Applicants by Step (1)', 'App Flow', and 'Print Apps'. A red arrow points to the 'Add Step' link. Below the links is a table with the following data:

Step	Evaluation Step	Weight	Results	At Step
Step 1	Application Received	N/A	View Results	0
Step 2	Supplemental Questionnaire Review	40.000%	View Results	0

4. The evaluation step form will display.

Definition	
* Step Type	Rating Matrix
Step Name	SME Review
Display Candidate Status As	SME Review
Applicant Status	<input type="radio"/> Do Not Show This Step <input checked="" type="radio"/> Show This Step <input checked="" type="checkbox"/> Show Step Pass/Fail <input checked="" type="checkbox"/> Show Step Score <input checked="" type="checkbox"/> Show Step Disposition
Comments	<div style="border: 1px solid #ccc; height: 60px;"></div>
Cumulative Score	<input type="radio"/> Do Not Show Cumulative Score <input checked="" type="radio"/> Show Cumulative Score
Prerequisite Steps	<input checked="" type="checkbox"/> Application Received <input checked="" type="checkbox"/> Supplemental Questionnaire Review <input type="checkbox"/> SME Review
* Rating Method	<input type="radio"/> 5-Star Rating <input checked="" type="radio"/> Numeric Rating Scale
* Rating Scale Maximum Default	100
Scoring	
* Calculate Final Score Based On	<input type="radio"/> Rescaled Score <input checked="" type="radio"/> Percentage Score
* Final Score Weight	60.00 % Max: 60.00%
* Calculated Score Decimal Places	2
* Passing Score Percentage	1 %
Rating Matrix Details	
Self-Schedule	<input type="checkbox"/> Allow candidate self-scheduling
Rating Matrix Exam Dates	View Dates
* Select Raters	Ashleigh Lopez x
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.
Comments	Select Show Step Pass/Fail, Show Step Score, and Show Step Disposition. 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.

Module 5: Evaluate Candidates

Steps to Evaluate Candidates

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

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	0	Edit Audit Trail

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

View Applicants By Step

Recruiting File	00066 - Ash Test IT
Evaluation Step	Application Received
Candidates Selected	3

Fields marked with an asterisk (*) are required

Applicant:	Name	Person ID
	Jensen, Ashleigh	5389243
	Lopez, Miguel	5389244
	Lopez, Zoe	5389240

* Pass/Fail Step: Passed Failed Other

* Reject Reason:
If Failed option is selected in Pass/Fail Step then required.

Comments:

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.

Step 1: Application Received [Step History](#) [Step Comments](#) [SME step comments report](#)

	Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source	Received	Notices	Audit Trail	Unsubscribed
0 Records Found	Page: 1 of 1										
<input type="button" value="Advance to Next Step"/>				<input type="text" value="All"/>				<input type="button" value="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.

Step 2: Minimum Qualifications Screening

Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source	Received	E-References	Notices	Audit Trail
Butler, Maddison	27897498	View	Fail - 0.00%		<input type="checkbox"/>	Paper	01/03/18 03:17 PM	N/A	NA	View
Ho, Jason	28792381	View	Pass - 0.00%		<input type="checkbox"/>	Paper	01/03/18 03:16 PM	N/A	NA	View
Smith, Helen	28792433	View	Fail - 0.00%		<input type="checkbox"/>	Paper	01/03/18 03:18 PM	N/A	NA	View
Tano, Absoka	28792545	View	Pass - 0.00%		<input type="checkbox"/>	Paper	01/03/18 03:19 PM	N/A	NA	View
Vaughn, Anastasia	34857174	View	Pass - 0.00%		<input type="checkbox"/>	Paper	01/03/18 03:08 PM	N/A	NA	View

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.

Question 2) Do you have two or more years of clerical experience?

Choices	Selected	Correct
Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>
No	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Question Summary

Total Passed: 0

Total Required: Exact

CRITERIA NOT MET

Case Summary

Formula: <ans1> AND <ans2>

CRITERIA NOT MET

Scoring Factor: **REJECTED**

Total Points: 0

Max Points: 1.0000

Final Score: 0%

Rating Matrix- SME Review

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

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Minimum Qualifications Review	N/A	View Results	1	Edit Delete Audit Trail
Step 2	T and F Review	N/A	View Results	9	Edit Delete Audit Trail
Step 3	Rating Matrix Review	25.000%	View Results	0	Edit Delete Audit Trail

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.

<input type="checkbox"/> Vaughan, Kelley	32145567	View	● Pass			Paper
<input type="checkbox"/> Walker, Michael	32145549	View	● Pass			Paper

9 Records Found Page: 1 of 1

Step 3 : Rating Matrix Review

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.

<input type="checkbox"/> Vaughan, Kelley	32145567	View	● NA			Paper
<input type="checkbox"/> Walker, Michael	32145549	View	● NA			Paper

8 Records Found Page: 1 of 1

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.

Human Resources Analyst

Assign to SMEs:

Your Name

Candidate	Person ID	Assigned to SME	Unassign
Blackburn, Gordon	32145490		
Learner, James	32144449		
Newman, Carla	32145502		
Ortman, Julie	32145507		
Palmer, Mark	32145518		
Stern, Phillip	32145525		
Vaughan, Kelley	32145567		
Walker, Michael	32145549		

Submit

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

Step 2 : T and E Review

Step 3 : Rating Matrix Review

<input type="checkbox"/> Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source
<input type="checkbox"/> Blackburn, Gordon	32145490	View	N/A	•		Paper
<input type="checkbox"/> Learner, James	32144449	View	N/A	•	•	Online
<input type="checkbox"/> Newman, Carla	32145502	View	N/A	•		Paper
<input type="checkbox"/> Ortman, Julie	32145507	View	N/A	•		Paper

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.

List Name	List Type	Expiration Date	# On List Total	# On List Active	Action
Default List	Regular	N/A	0	0	Edit View Candidates Audit Trail

3. The eligible list detail page will display.

* Required

* List Name	Default List
Display Candidate Status As	Placed on Eligible List
Promulgation Date	October 27 2017
Expiration Date	= Month = = Day = = Year =
Days Candidate Eligible	120
* Exam Score Decimal Places	2
* Total Score Decimal Places	2
* Calculate Exam Score Based on	<input type="radio"/> Rescaled Score <input checked="" type="radio"/> Percentage Score <input type="radio"/> Z-Score
Banded Score (Low) Cutoff Values (separate with commas)	
Band Scores Based On	<input checked="" type="radio"/> Exam Score <input type="radio"/> Total Score
Duplicate Handling	Allow Duplicates
List Type	Regular
List Status	Active
Comments	

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 <i>Default List</i> .
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 List Type	Leave the default selection of Allow Duplicates.
List Status	Leave the default selection of Regular.
Comments	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.

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	MQs and Rankings		View Results	2	Edit Delete Audit Trail
Step 2	SME Review		View Results	1	Edit Delete Audit Trail

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.

Candidate Name	Weight	View	Results	Score	Format	Time
<input type="checkbox"/> Vaughan, Kelley	32145567	View	Pass - 86.67%		Paper	04/2
<input type="checkbox"/> Walker, Michael	32145549	View	Fail - 60.00%		Paper	04/2

6 Records Found

Place on Eligible List

- 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.

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

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

- 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
<input checked="" type="checkbox"/>	Learner, James	View	32144449	1	87.63	1	87.63	04/21/17	10/27/17			<input type="checkbox"/>
<input type="checkbox"/>	Ortman, Julie	View	32145507	2	87.07	2	87.07	04/21/17	10/27/17			<input type="checkbox"/>
<input checked="" type="checkbox"/>	Vaughan, Kelley	View	32145567	3	85.07	3	85.07	04/21/17	10/27/17			<input type="checkbox"/>
<input type="checkbox"/>	Palmer, Mark	View	32145518	4	83.97	4	83.97	04/21/17	10/27/17			<input type="checkbox"/>
<input type="checkbox"/>	Blackburn, Gordon	View	32145490	5	75.77	5	75.77	04/21/17	10/27/17			<input type="checkbox"/>

Select Action:

Select Candidate(s):

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
<input type="checkbox"/> Whitney, Jan	38810705	View	<input checked="" type="radio"/> Fail - 0.00%	0.00%		<input type="checkbox"/>	Paper	04/19/19 09:16 AM	N/A	View	<input type="checkbox"/>

1 Record Found Page: 1 of 1

Email Notify:

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:

Disposition: Rejection Reason Not Specified

Template:

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

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

[View Applicants By Step](#)

Chief Learning Officer (Sample Posting)
 Email preview appears below. Emails will NOT be sent until you click on the 'Send' button.

Reject Reason Not Specified Template: DHR ONLY Test Notification MQs

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

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

April 19, 2019

Jan Whitney
 63 E Grand
 Boise, ID 83716

Dear Jan:

This message is to notify you of your application status for Chief Learning Officer (Sample Posting). Unfortunately, you have failed to meet the position minimum qualifications and will not be considered for the position. You can log into your GovernmentJobs.com account at any time to view this message or your application status.

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](#)

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.

List Name	List Type	Expiration Date	# On List Total	# Active	Action
Default List	Regular	N/A	5	0	Edit View Candidates Audit Trail

Requisitions [Add New](#)

Req #	Title	Department	Date Created	Action
00007	Human Resources Analyst	Human Resources	04/15/2017	Edit Authorize Disassociate Reassign

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.

2 candidates on list.

	Total Rank	Total Score	Veteran Status	State Employee	Name	Master Profile	Comments	Notices
<input type="checkbox"/>	1	100.00		Yes	Tasks, Daily	View	Add	
<input type="checkbox"/>	2	91.00		Yes	Smith III, Christian H	View	Add	

Select Action Select Candidate(s)

Send Email Notification All Candidates

- 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.)
- Then click Generate Notices.

Disposition: Inactivation Reason Not Specified * Template **Statewide Application Total 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

- 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

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](#)

- Click Send to send the notices to each applicant.
- 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
<input type="checkbox"/>	1	100.00		Yes	Tasks_Daily	View	Add	View

Create a Referred List

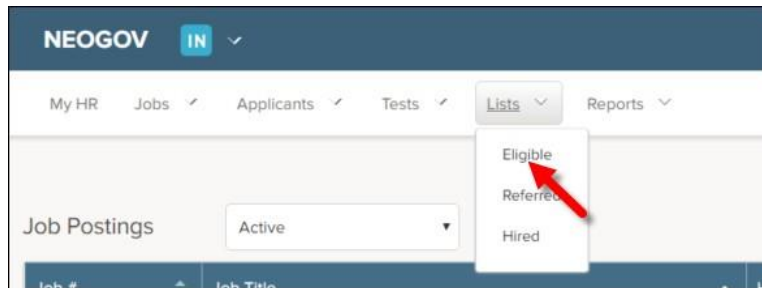
In the previous section, you placed all candidates that passed the minimum qualifications review step and any additional evaluation steps on an eligible list and notified them of their application score/status. You will now refer these same candidates to the hiring department. This referral action creates 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.

List Name	List Type	Expiration Date	# On List Total	# On List Active	Action
Default List	Regular	N/A	5	5	Edit View Candidates Audit Trail

or



Exam Plan #	Title	List	List Type	Status	Pr
00002	Human Resources Analyst	Default List	Regular	Active	04

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.

View	Person ID	Rank	Total Score	Last Referred	Exam #	Department	Division	Hiring Mgr	Action
View	32145518	4	83.97	04/21/17	00002	Human Resources Analyst		Hanna, J.	Add
View	32145490	5	75.77	04/23/17	00002	Human Resources Analyst		Hanna, J.	Add

Select Action: Select Candidate(s):

- 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 managers assigned to the requisition regarding the new referred list of candidates. The text entered in the Comments box will display in the email notification.

Referring to Requisition: 00002 - Human Resources Analyst

Comments (will be displayed on referred list that Hiring Manager sees):

This is a referred list of highly qualified candidates for the Human Resources Analyst position. Next steps: (1) Schedule candidates for on-site interviews. (2) Conduct on-site interviews. (3) Extend an offer of employment to the top candidate. (4) If top the candidate accepts the offer, complete the hire process.

5 records found.
Page 1 of 1

Candidate	Person ID	Rank	Total Score
Learner, James	32144449	1	92.63
Vaughan, Kelley	32145567	2	90.07
Ortman, Julie	32145507	3	87.07
Palmer, Mark	32145518	4	83.97
Blackburn, Gordon	32145490	5	75.77

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

Active

Req #	Req Title	Exam #	List	Last Referred	Depart...	Division	Hiring Mgr	Action
00002	Human Resources Analyst	00002	View...	04/24/17	Human Reso...		Hanna, J.	<input type="button" value="Edit"/>

Page 1 of 1 Showing 1-25 of 1 item.

- The Edit Referred List page will display.

Fields marked with an asterisk (*) are required

Display Candidate Status As	<input type="text" value="Referred to Hiring Manager"/>
Referred List Inactivity Notice	<input type="text" value="14 days"/>
Referred List Expiration Notice	<input type="text" value="7 days"/>
Referred List Expiration Days	<input type="text" value="90"/>
Referred List Expiration Date	<input type="text"/>

6. Complete the form using the table below.

* Required

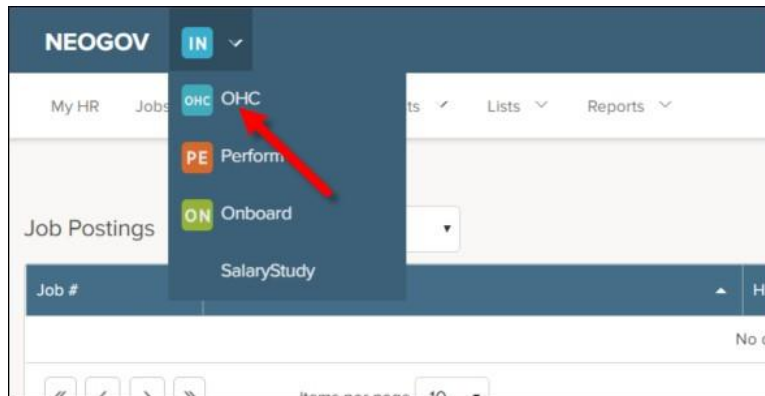
Field	What to Enter
Display Candidate Status As	This message will display to candidates who sign back into Career Pages to see their current application status. Enter "Referred to Hiring Manager".
Referred List Inactivity Notice	An email notification will be sent to the assigned analyst if the assigned 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

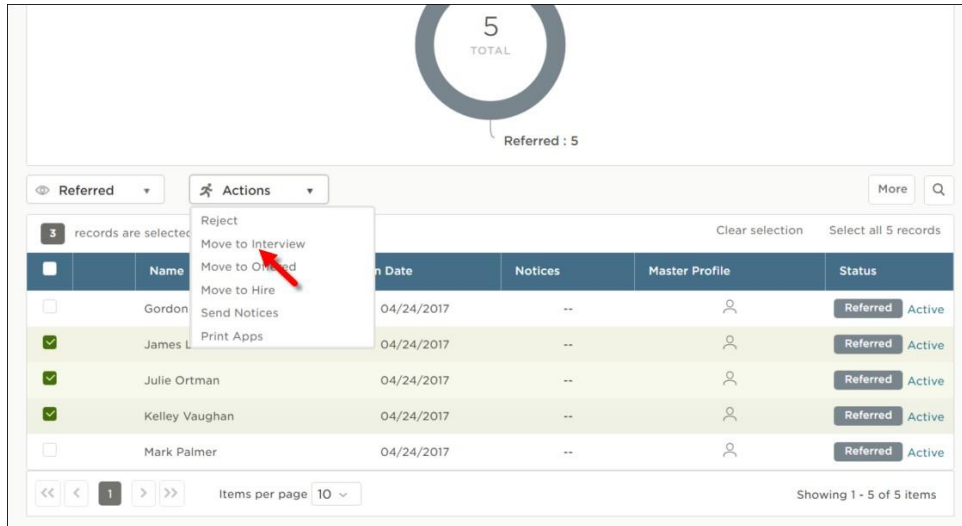
1. For this training module, you will impersonate the role of the hiring manager to complete interview and hiring tasks from the OHC. This will give you a real-world perspective; seeing what your hiring managers will see. If you're not already in the OHC, return back. On the NEOGOV Product menu, click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



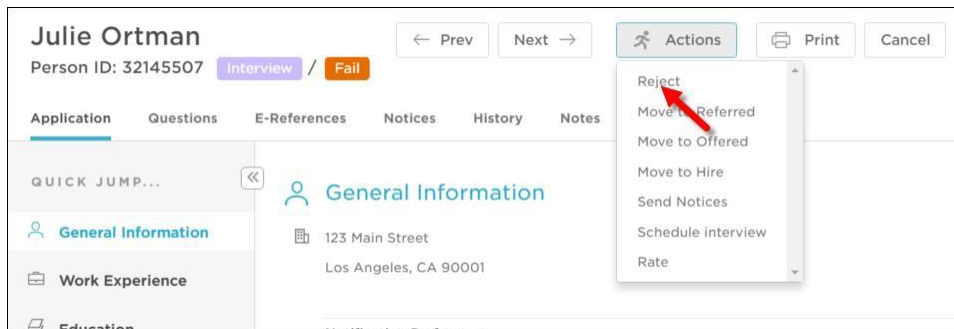
2. From the My Candidates section, click the referred list assigned to you.



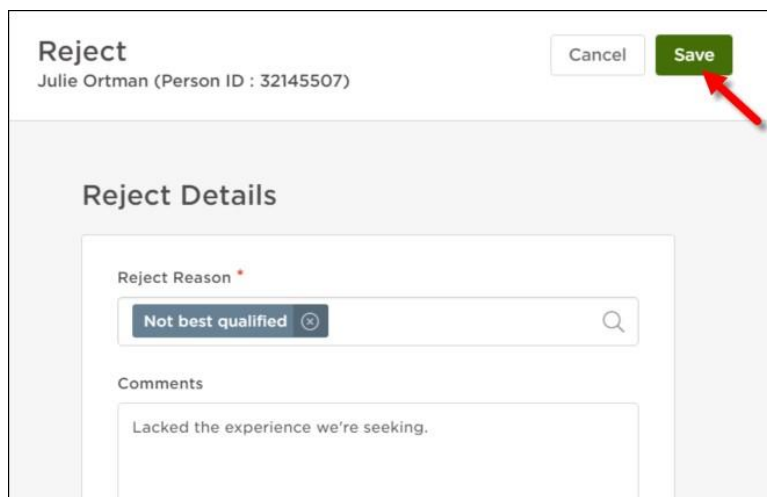
3. Select the candidates you want to interview. Next, on the Actions menu, click Move to Interview and then click OK to confirm.



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.

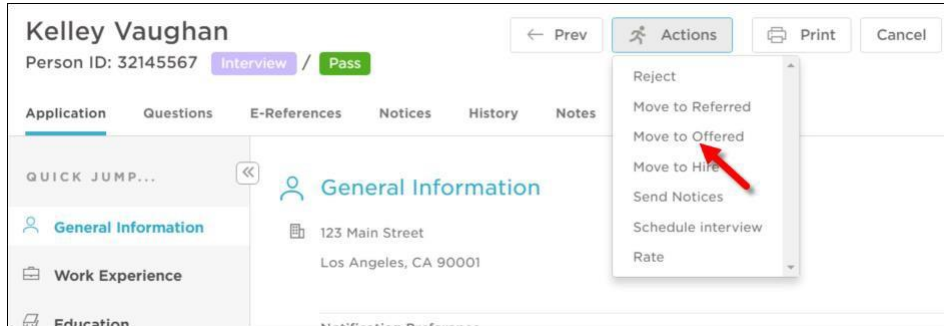


5. The reject form will display. From the Reject Reason field, select the applicable reject reason, enter any comments and click Save.

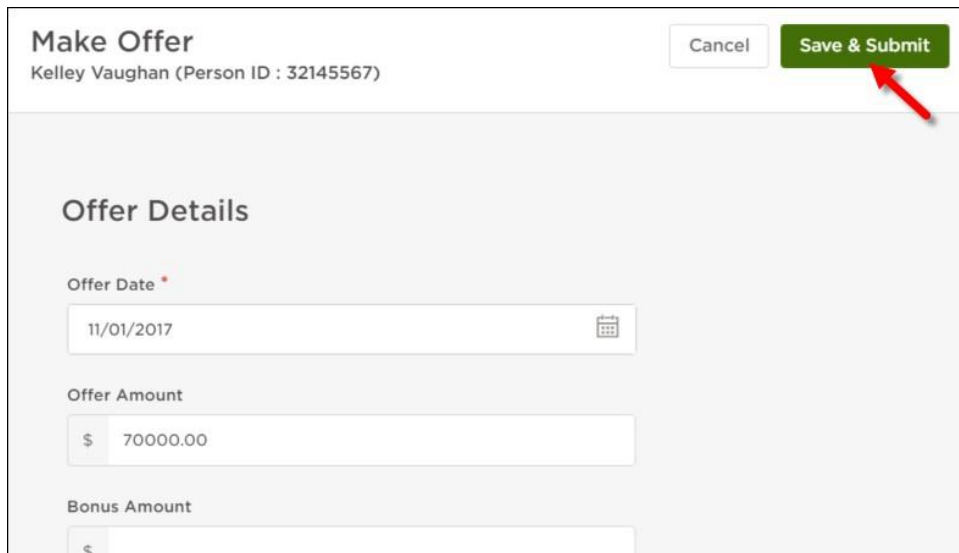


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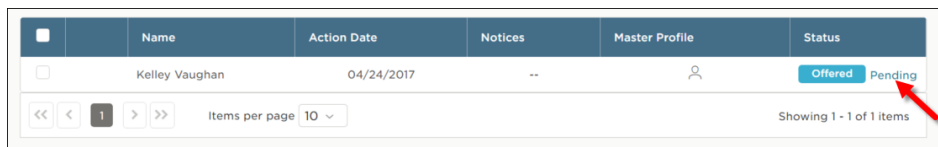
6. Click Cancel or anywhere to the left of the candidate's application to return back to your assigned referred list.
7. Click the candidate that will be offered the position. On the Actions menu, click Move to Offered.



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.

Make Offer
Kelley Vaughan (Person ID : 32145567)

Cancel Save & Submit

Accepted Rejected Answer Pending

Offer Details

Offer Date *
11/01/2017

Offer Response Date
11/01/2017

Offer Amount
\$ 70000.00

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.

Kelley Vaughan
Person ID: 32145567 Offered

Application Questions E-References Notices History Notes

QUICK JUMP... <<

General Information
123 Main Street
Los Angeles, CA 90001

Actions Print Cancel

- Reject
- Move to Referred
- Move to Interview
- Move to Hire
- Send Notice

14. The hire form will display.

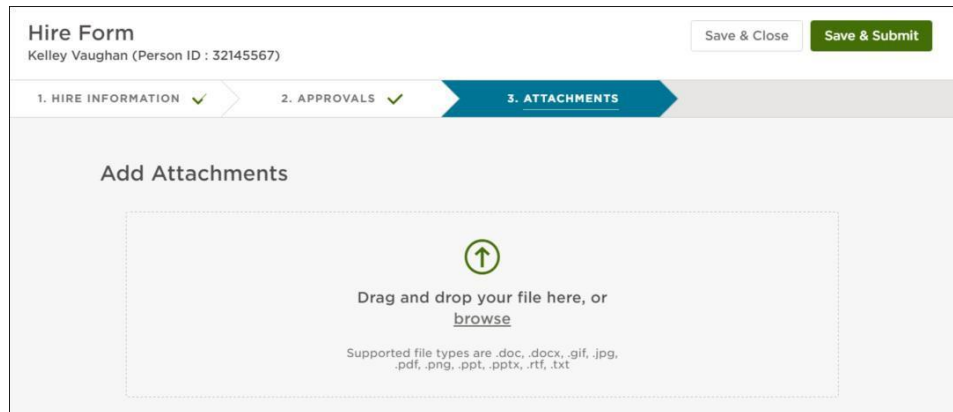
15. Complete the form using the table below.

* 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.



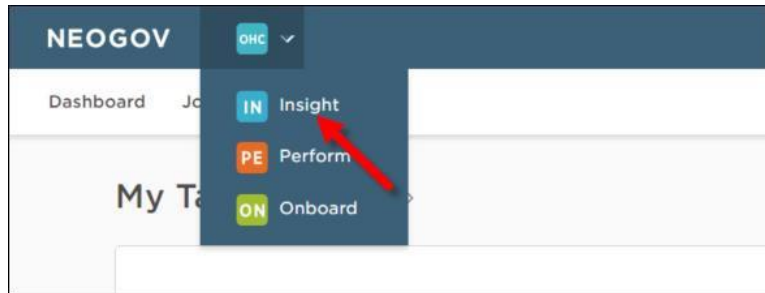
The screenshot shows a web interface for a 'Hire Form'. At the top left, it says 'Hire Form' and 'Kelley Vaughan (Person ID : 32145567)'. On the top right, there are two buttons: 'Save & Close' and 'Save & Submit'. Below this is a progress bar with three steps: '1. HIRE INFORMATION' with a checkmark, '2. APPROVALS' with a checkmark, and '3. ATTACHMENTS' which is highlighted in blue. The main content area is titled 'Add Attachments' and contains a large dashed box. Inside the box is a green circular icon with an upward arrow. Below the icon, the text reads: 'Drag and drop your file here, or [browse](#)'. At the bottom of the dashed box, it lists supported file types: '.doc', '.docx', '.gif', '.jpg', '.pdf', '.png', '.ppt', '.pptx', '.rtf', '.txt'.

18. Click Save & Submit.

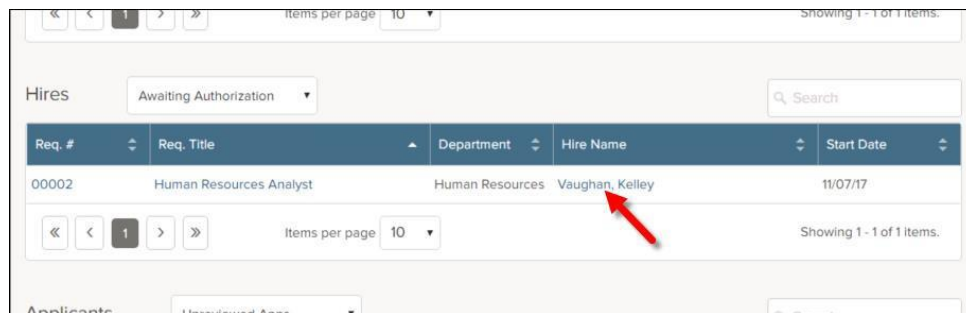
Module 9: Authorize a New Hire and Fill a Requisition

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.



NEOGOV

4. Click Save and Authorize.

Orientation Date: 11/08/17

Keep Active on Eligible List: No

Comments: 2500 character limit

Approvals: None

Final Authorization: Awaiting authorization

Save Save and Authorize

5. An approval confirmation will display.

Start Date: 11/07/17

Orientation Date: 11/08/17

Keep Active on Eligible List: No

Comments:

Approval Status: Authorized on 11/01/17 9:36 AM by Jason Hanna

Attachments: Add New

Attachment Title	Date Uploaded	File Name	Action
------------------	---------------	-----------	--------

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.

Requisitions Add New

Req #	Title	Department	Date Created	Action
00002	Human Resources Analyst	Human Resources	04/15/2017	Edit Authorize Disassociate Referrals

Tasks Add New

Subject	Status	Priority	Due Date	Assigned To	Action
---------	--------	----------	----------	-------------	--------

Notes Add New

- Select Filled from the Status pulldown.

A screenshot of a web form with a grey header bar containing a '* Required' label. The form has several fields:

- * Status: A dropdown menu with 'Filled' selected. A red arrow points to this dropdown.
- * Analyst: A dropdown menu with 'Hanna, Mason' selected.
- Existing Exam Plan: A text input field with a search icon and a dropdown arrow on the right.
- Comments: A large text area.

- Once you're done, click Save.
- The last few steps involve updating the candidate status messages for both eligible and referred lists. From the Eligible Lists section, click Edit.

A screenshot of a web interface showing two tables. The top table is titled 'Eligible Lists' and has columns: List Name, List Type, Expiration Date, # On List Total, # On List Active, and Action. The first row is 'Default List', Regular, N/A, 5, 4. The 'Action' column has links for 'Edit', 'View Candidates', and 'Audit Trail'. A red arrow points to the 'Edit' link. Below this is a 'Requisitions' section with a table with columns: Req #, Title, Department, Date Created, and Action. The first row is '00002', Human Resources Analyst, Human Resources, 04/15/2017, and 'Edit, Authorize, Disassociate, Referrals'.

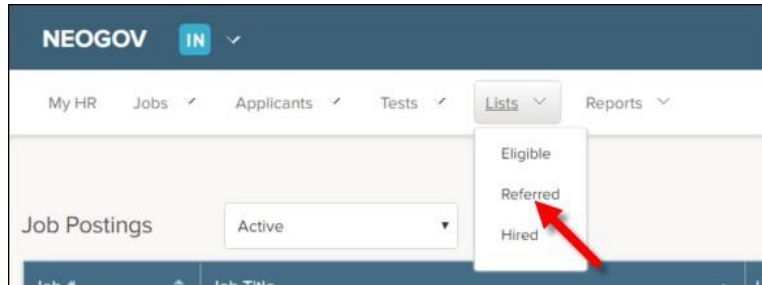
- Change the Display Candidate Status As field value to, "Position filled," or something similar and set the days candidate eligible to 90 days.

A screenshot of a web form with a grey header bar containing a '* Required' label. The form has several fields:

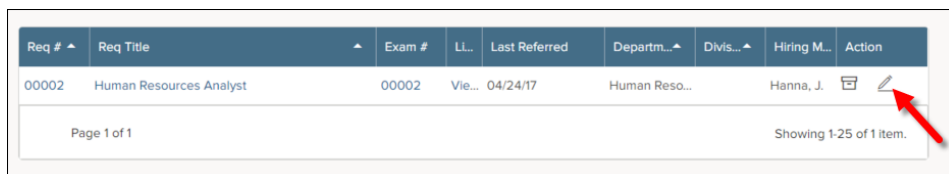
- * List Name: A text input field with 'Default List' entered.
- Display Candidate Status As: A text input field with 'Position filled' entered. A red arrow points to this field.
- Promulgation Date: A date selector with 'April', '23', and '2017' selected.
- Expiration Date: A date selector with 'Month =', 'Day =', and 'Year =' dropdown menus.
- Days Candidate Eligible: A text input field with '90' entered.
- * Exam Score Decision Display: A dropdown menu.

- Once you're done, click Save.

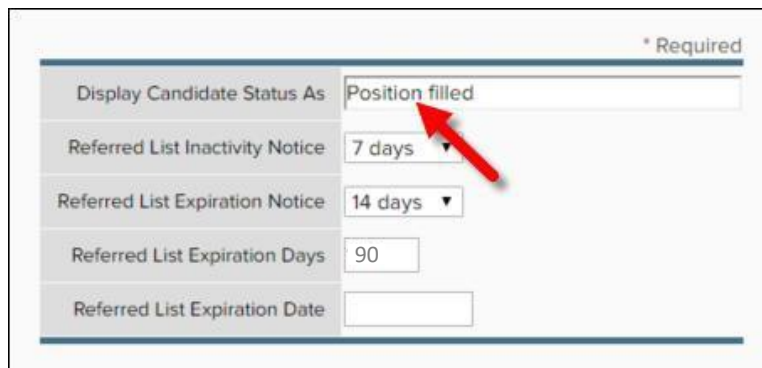
13. Now on to update the same field for the referred list. Click Referred on the Lists menu. Search for and find your referred list.



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, log in to NEOGOV, hover over your name in the top right, go to Help & Training, Products, Insight Training.