

## NEOGOV INSIGHT

# The New OHC

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# The New OHC

## Introduction

We're excited to offer to you a new take on a NEOGOV classic: the Online Hiring Center (OHC). The OHC engages hiring department staff, subject matter experts and approval groups in the recruitment and selection process from requisition to hire. With the redesigned version, OHC users will benefit from an intuitive interface featuring a central dashboard of pertinent tasks and many other great features. This guide will give you an overview of concepts that have remained the same, areas that have changed and some completely new functionality. Welcome to the *new* OHC!

## OHC Roles

The five OHC roles of Hiring Manager,  SME, Approver, Originator and HR Liaison, have remained the same. There have been no changes to the tasks each role is permitted to complete. If an OHC user has pending tasks or associated requisitions, it is business as usual when you switch to the new OHC. Everything will carry over, and in fact, the OHC user will likely find it easier to see what is pending their review.

New to the OHC family is the  Rater role. With this role, OHC users can rate candidates based on a new star rating or traditional pass/fail and scored methods.

Permitted Task	Originator	HR Liaison	Hiring Manager	Rater	<del>SME</del>	Approver
Create requisitions	•	•				
View all assigned departments' requisitions		•				
Manage all assigned departments' OHC user accounts (if given access)		•				
Approve/deny requisitions						•
View applications		•	•	•	•	•
<del>Change candidates' disposition values (prior to the referred list)</del>					•	
Send notices to candidates (if given access)		•	•			
View and rate assigned referred lists				•		
View and take action on assigned referred lists			•			
View and take action on all assigned departments' referred lists		•				
Approve/deny hires						•

## OHC Dashboard

After signing into the OHC your dashboard displays. This is a centralized place of items that require your attention. In the OHC world, these are your assigned tasks, referred candidates and associated requisitions. This functionality is a departure from the previous version of the OHC.

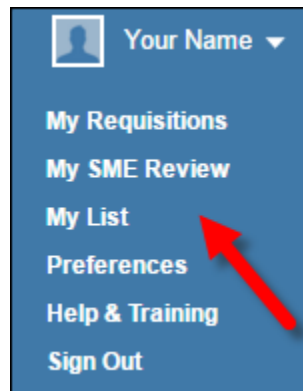
## Previously Used Menus

In the previous version of the OHC, you accessed various menus to accomplish a combination of tasks including creating and approving requisitions, completing interviews and many others.

### Profile Menu



The Profile menu was used to access:

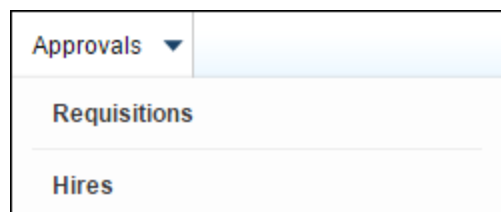
- My Requisitions – Add, edit, reassign or check the status of a requisition.
- ~~My SME Review – Complete an SME review assigned to you.~~
- My List – Complete interview and hiring tasks for a referred list of candidates sent to you.



### Approvals Menu

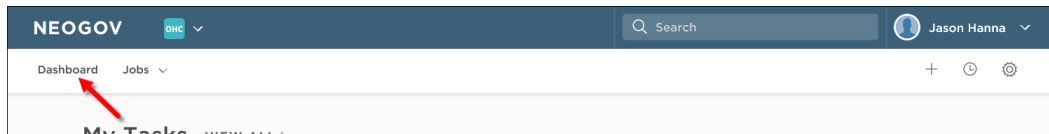
The Approvals menu was used to access:

- Requisitions – Approve/deny requisitions sent to you. 
- Hires – Approve/deny hires sent to you. 





## Replacement to the Menus

The replacement to these menus is the dashboard. Whenever you need to return back to the dashboard, click Dashboard, from the upper left.

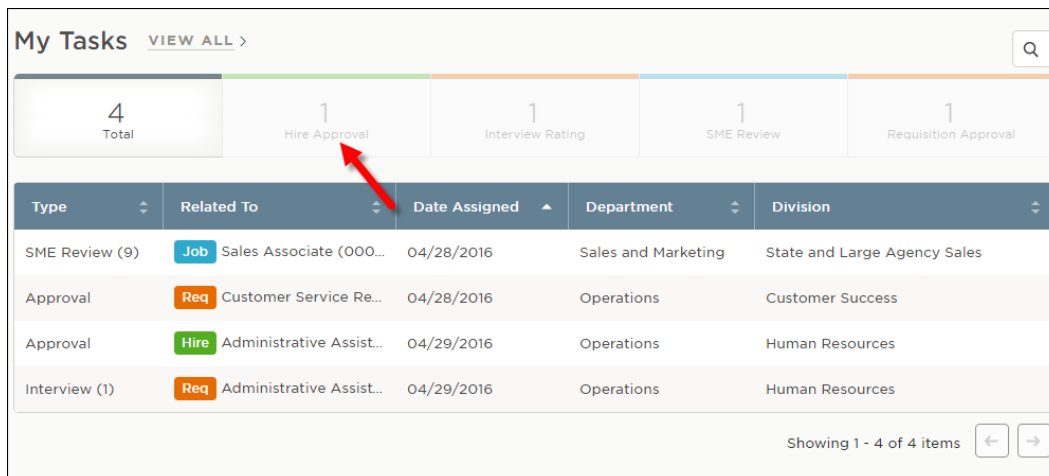


## My Tasks

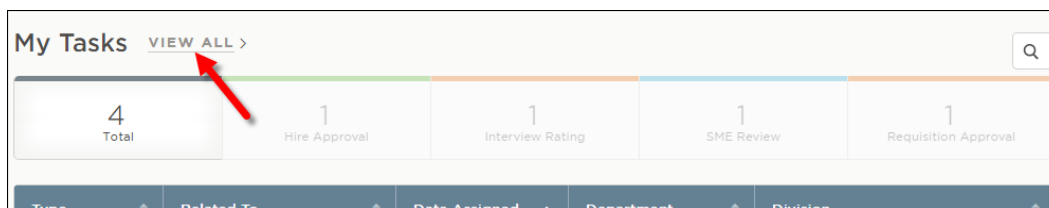
In the My Tasks section, you can have four different types of tasks pending your review:

1. Requisition Approval 
2. ~~SME Review~~
3. Interview Rating
4. Hire Approval 

The default view displays all tasks pending your review. Click one of the color-coded tabs to view a specific task type.



To view all tasks, including completed ones, click VIEW ALL.



## My Candidates

In the My Candidates section, referred lists will display for which you are an assigned hiring manager.

My Candidates <span>Q</span>						
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

Showing 1 - 2 of 2 items ← →

## My Requisitions

In the My Requisitions section, four types of requisitions associated with you will display:

- Draft – Requisitions you have created and saved, but haven't yet submitted.
- In-Progress – Requisitions you have submitted and are in progress of being approved.
- Approved – Requisitions you have submitted and have been approved by all groups.
- Open – Requisitions you have submitted and have been opened by HR for recruiting.

The default view displays all draft, in-progress and approved requisitions associated with you. Click one of the color-coded tabs to view a specific requisition type.

My Requisitions <a href="#">VIEW ALL &gt;</a> <span>Q</span>						
3 Total		1 Draft		1 In-Progress		1 Approved
Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On
00003	<span>Draft</span> Accountant	Operations	Finance	Jason Hanna	<span>⌚</span> Draft	04/28/2016
00007	<span>Approved</span> .NET Prog...	Development	Production Applications	Jason Hanna	<span>✓</span> Complete	04/28/2016
00008	<span>In Progress</span> Customer ...	Operations	Customer Success	Jason Hanna +1	<span>⌚</span> 0 of 4	04/30/2016

Showing 1 - 3 of 3 items ← →

To view all requisitions, including filled and cancelled ones, click VIEW ALL.

My Requisitions <a href="#">VIEW ALL &gt;</a> <span>Q</span>						
3 Total		1 Draft		1 In-Progress		1 Approved
Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On

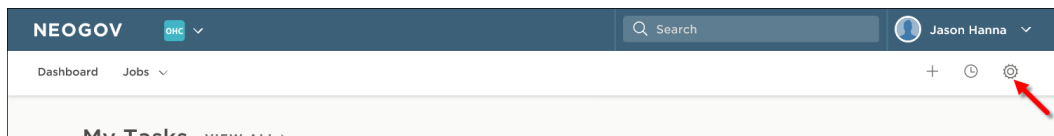
## Create an Approval Workflow


Ever wish you could create templates for your various requisition and hire approval paths? It's now possible with the new OHC!

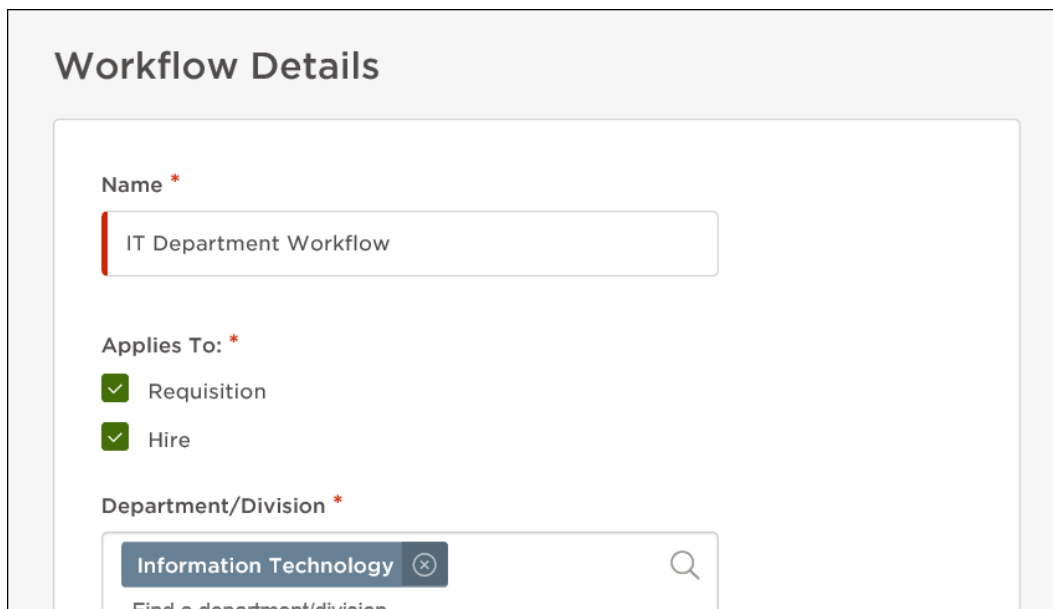
With the OHC role of HR Liaison, you can create saved approval workflows for your assigned department(s)/division(s).

### Steps to Create an Approval Workflow


1. From the upper right, click the Settings button. It looks like a gear.

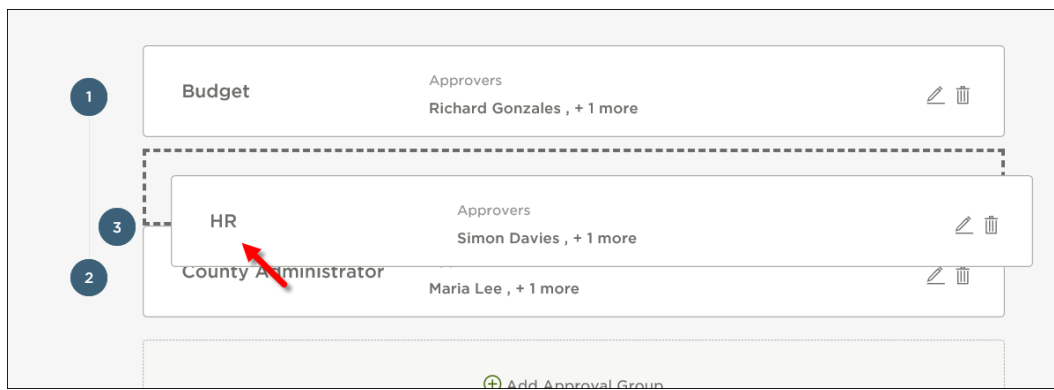


2. Click Approval Workflow, and then click Add.
3. From the Name field, enter a name for your approval workflow, e.g., IT Department Workflow.
4. From the Applies To field, select Requisition, Hire, or both.
5. From the Department/Division field, click , select the applicable department(s)/division(s), and then click Done.


 A screenshot of the 'Workflow Details' form. The form has a light gray background. The 'Name' field is a text input with a red asterisk, containing the text 'IT Department Workflow'. The 'Applies To' field has a red asterisk and two checkboxes: 'Requisition' and 'Hire', both of which are checked. The 'Department/Division' field has a red asterisk and a search bar. The search bar contains the text 'Information Technology' and a magnifying glass icon. Below the search bar, there is a placeholder text 'Find a department/division'.



6. Will your workflow have approval steps? If not, from the Approvals switch, click to the off setting, and then click Save. If your workflow will have approval hurdles, leave the Approvals switch in the on setting and continue to the next step.
7. On the Approval Group pulldown, click the applicable approval group.
8. From the Approvers field, click , select the applicable approvers, and then click Done.
9. Click Add Approval Step.
10. Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.
11. Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop operation.



12. Once you're done, click Save to add your first approval workflow!

## Create a Requisition

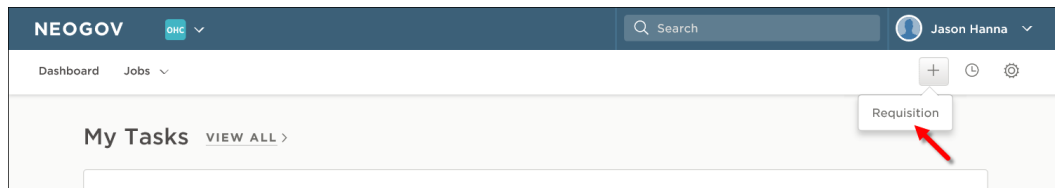
With the OHC role of Originator or HR Liaison, you can create a requisition.

When a hiring department has an open position, they'll submit a requisition as a request to fill the vacancy.

Below are two navigation paths to start up the process of creating a requisition.

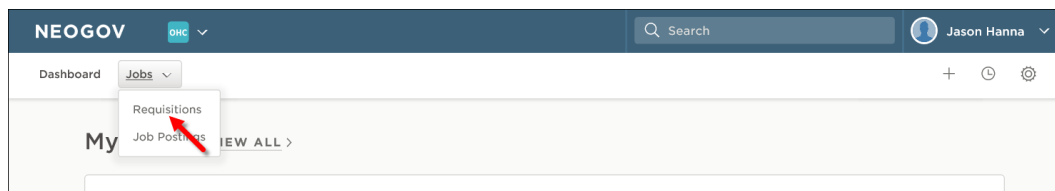
### Navigation Path 1

On the Add New menu [+], click Requisition. This can be done from any page.

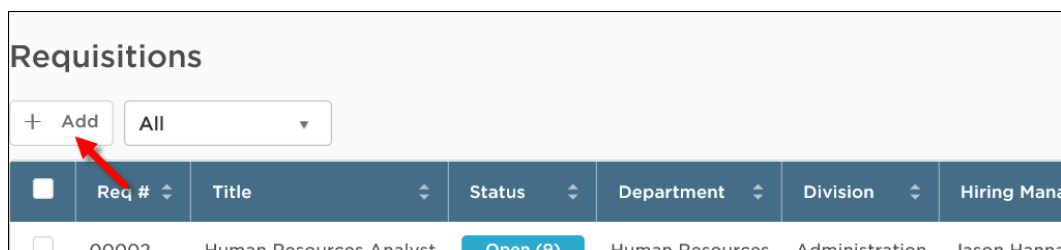


### Navigation Path 2

On the Jobs menu, click Requisitions.



Then click Add.



## Steps to Create a Requisition

1. The first of three requisition form pages will display.

**Requisition Details**

Requisition # [Assigned when requisition is saved]

Department/Division \* Information Technology

Class Spec \* IT Project Manager (1159)

Working Title IT Project Manager

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 # \* 000361

Vacancy Date 11/01/2017

Delete

2. Complete the requisition form page.
3. Have you selected the correct class spec? There's a way you can check. From the Class Spec field, click the selected job title to have a closer look. After your review, click Close.

**Create Requisition**

1. CREATE 2. APPROVALS

**Requisition Details**

Requisition # [Assigned when requisition is saved]

Class Spec \* IT Project Manager (1159)

**Class Spec Details**


Description

Plan, initiate, and manage information technology (IT) projects. Lead and guide the work of technical staff. Serve as liaison between business and technical aspects of projects. Plan project stages and assess business implications for each stage. Monitor progress to assure deadlines, standards, and cost targets are met.


Examples of Duties

- Manage project execution to ensure adherence to budget, schedule and scope

4. Once you've completed the form, click Save & Continue to Next Step.

5. If you have an approval workflow  template, it will display on the second requisition form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes will only be applied to this requisition, not the saved approval workflow template.

### Approval Workflow



The approval workflow below has been automatically applied to this requisition based on the Department/Division.  
You have the option to override the workflow for this requisition


1

Budget



Approvers

Richard Gonzales , + 1 more

Status

 Pending...

Comments


2

HR



Approvers

Simon Davies , + 1 more

Status

 Pending...

Comments


3

County Ad...



Approvers


Maria Lee , + 1 more


Status

 Pending...

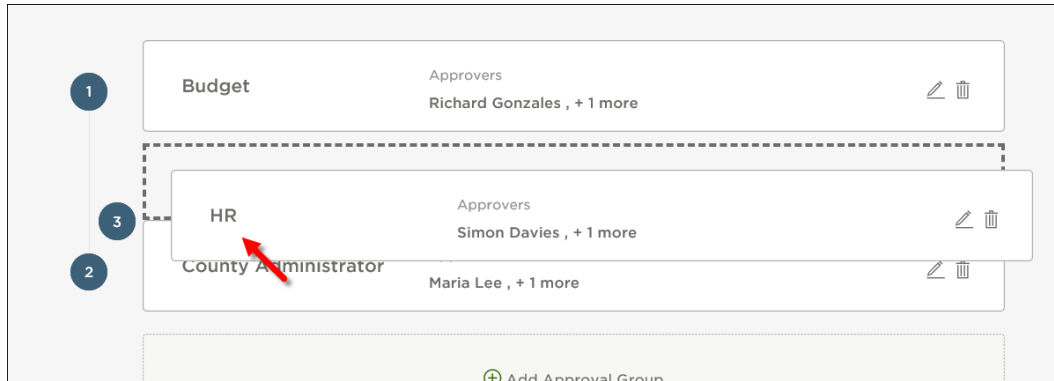
Comments

 [Add Approval Group](#)

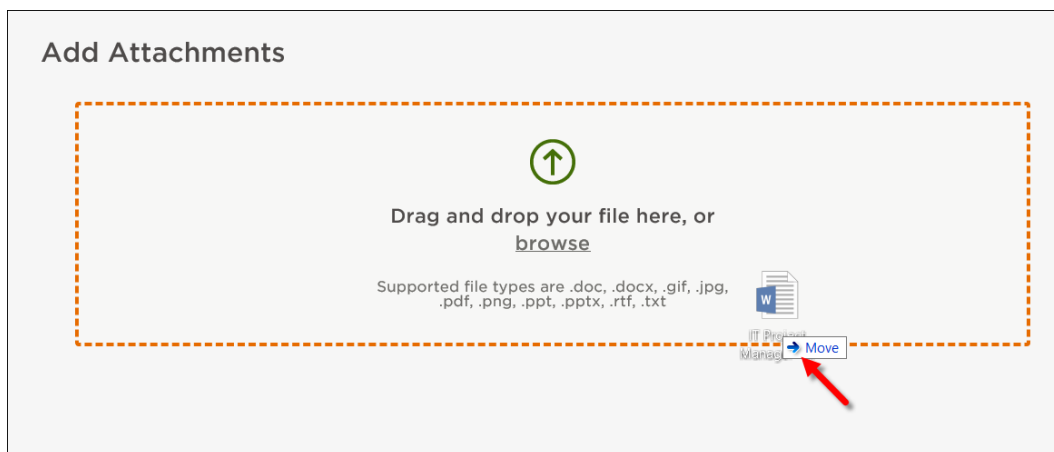
6. You will be prompted to create an approval workflow if a template for your department/division does not exist. You have two options: (1) Create an approval workflow. (2) Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.
7. On the Approval Group pulldown, click the applicable approval group.
8. From the Approvers field, click , select the applicable approvers, and then click Done.
9. Click Add Approval Step.
10. Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.

11. Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop operation.



12. Once you're done, click Save & Continue to Next Step.

13. Drag any file attachments to the third requisition form page and click Save & Submit.



Note: If you're not quite ready to submit the requisition, click Save & Close. The requisition will display on your dashboard page in the My Requisitions section as a draft.

## Approve a Requisition

With the OHC role of Approver, you can review a requisition sent to you for approval.

Like the previous version of the OHC, the selections of approve, deny and on hold are available. Conversely, the cancel selection is no longer available for approvers. A requisition must be cancelled by the person that created it or someone with the role of HR Liaison. Additionally, if a requisition has been approved, it can be cancelled by an HR staff member with Insight access.

### Requisition Approval Path Example

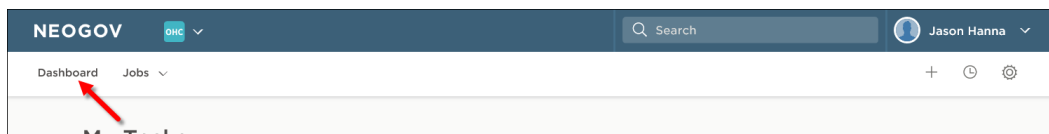
In the example below, the defined approval path requires the requisition to travel through a total of four approval groups before going to HR.

Once the requisition creator clicks Save & Submit, the requisition will go to the first approval group. In this example, both Simon Davies and Melanie Scott will be notified, via email, that a requisition requires their review. Like the previous version of the OHC, approval is on a first come, first approve basis. Either Simon or Melanie will need to approve the requisition to move it on to the next approval group.

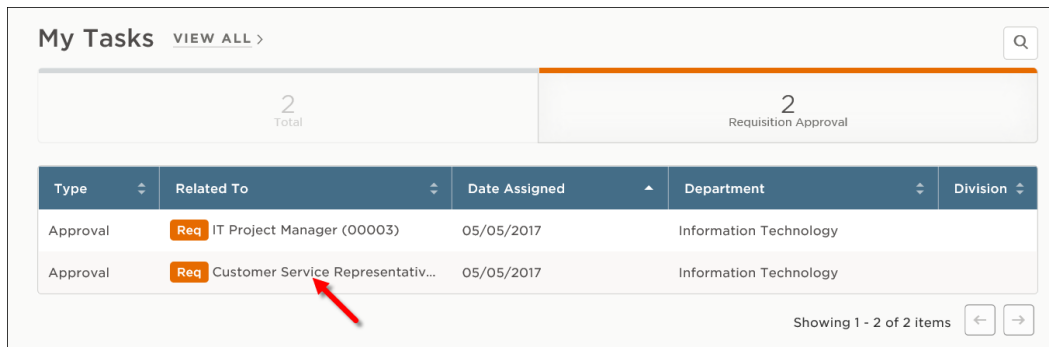
Approval Group	Selected Approver(s)
Group 1: Manager	Simon Davies and Melanie Scott
Group 2: Director	Joyce Lowe and Mark Campbell
Group 3: Budget	Nancy Reed
Group 4: President	Drake Thomas

### Steps to Approve a Requisition

1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. From the My Tasks section, click the requisition pending your review.



- Click Approve, type any comments and click Submit.

**Requisition Approval**  
Customer Service Representative (00005)

Cancel

✓ Approve

✗ Deny

|| Hold

Submit

Comment (Optional)  

I approve this requisition. Thank you!

**Requisition Details**

Requisition Number	Department
00005	Information Technology
Title	Division
Customer Service Representative	N/A

**APPROVAL TIMELINE**

1 Pending...  
Budget  
Richard Gonzales , +1 more

2 Pending...  
HR  
Simon Davies , +1 more

- If you're testing the approval workflow process, you may be an approver for multiple approval groups. In this case, repeat these steps until the requisition has been approved by all groups and sent to HR.

Note: Approvers have the option of denying or placing a requisition on hold. If denied, the requisition record can be sent back to any one of the previous approval groups, or all the way back to the creator. Depending on the circumstances of the denial (e.g., additional justification), the requisition approval process can be restarted.

**Requisition Approval**  
IT Project Manager (00003)

Cancel

✓ Approve

✗ Deny

|| Hold

Submit

Send Back to Step  

Originator - Hanna Jason

Comment (Optional)  

The County Administrator's Office requires a new position justification report (i.e., not a replacement of staff). Thank you in advance for providing this report.

**Requisition Details**

Requisition Number	Department
--------------------	------------

**APPROVAL TIMELINE**

05/05/2017 by Cheryl Ward

Budget  
Richard Gonzales , +1 more

## Reassign Requisitions

With the OHC role of Originator or HR Liaison, and the Allow Originator/Liaison Requisition Reassignment permission selected (Insight navigation: Admin > Agency Preferences > OHC Security), you can reassign a requisition.

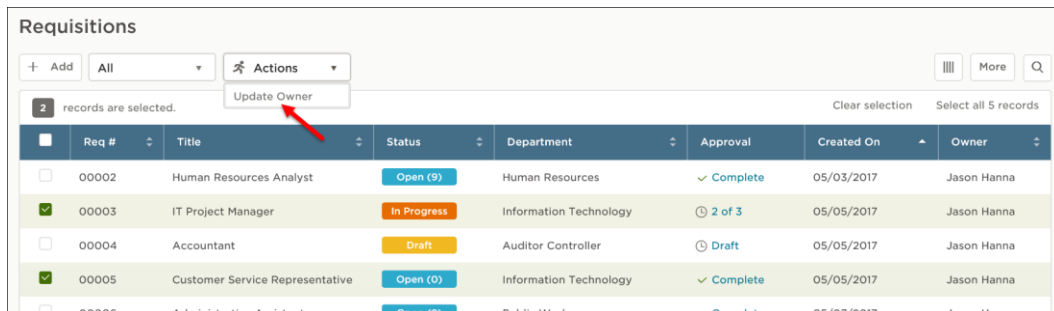
Like the previous version of the OHC, you can reassign a requisition to a different owner within your assigned department(s)/division(s). It gets better! With the new OHC you can reassign *multiple* requisitions, using a bulk action feature.

### Steps to Reassign Requisitions

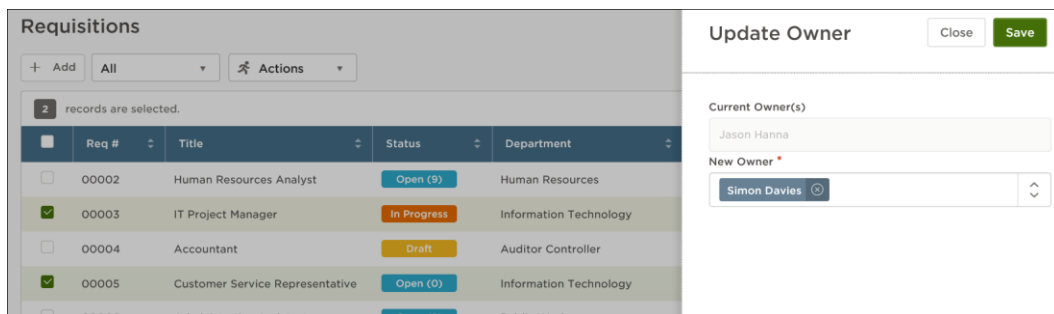
1. On the Jobs menu, click Requisitions.



2. Select the requisition(s) requiring reassignment to a different owner. On the Actions menu, click Update Owner.



3. On the New Owner pulldown, click the new owner's name.



4. Once you're done, click Save and then click Yes, Update.



## Complete an SME Review

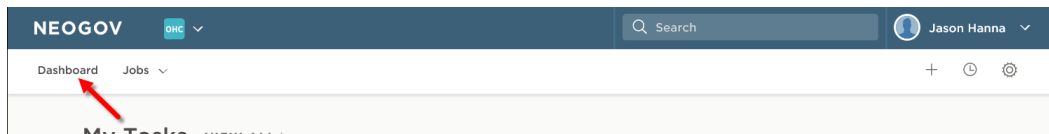
With the OHC role of SME, you can complete an SME review.

SME reviews are used when HR enlists the expertise of their organization's subject matter experts (SMEs) to assist with the candidate selection process. The application of an SME review ranges from a simple pass/fail rating with a single reviewer, to a scored assessment with a panel of multiple reviewers.

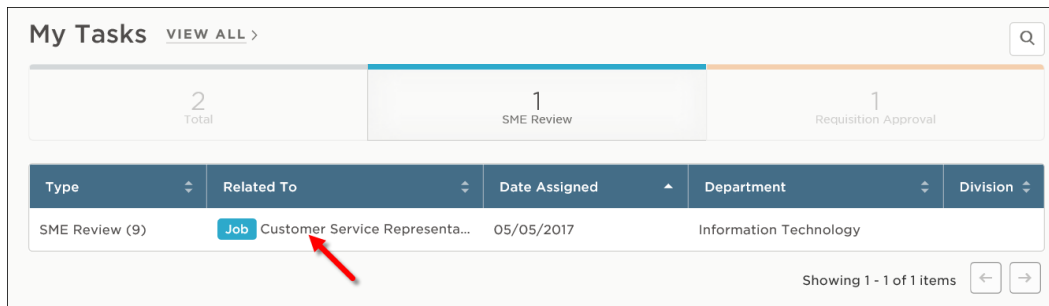
The new OHC now has an extra layer of user security in the context of scored performance and oral exam evaluation steps. To complete an SME review for either a scored performance or oral exam evaluation step, an OHC user must be given the SME role and a rater record (Insight navigation: Tests > Raters and Proctors) with an email address matching the user profile email address. This added security offers a well-defined scoring area when multiple reviewers are used.

### Steps to Complete an SME Review

1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. From the My Tasks section, click the SME review pending your review.



3. Click the name of the first candidate to be reviewed.

**SME Review**  
Customer Service Representative (Job Number : 00005)

**Complete Review**

**Exam Plan**  
Customer Service Representative

**At Step**  
T and E Review

**Exam Plan Number**  
00005

**Evaluate On**  
Pass / Fail

**Candidates**

9 Total | 9 Unreviewed | 0 Reviewed

	Person ID	Candidate Name	Assigned By	Last Reviewer	Last Reviewed
<input type="checkbox"/>	31400911	Carla Newman	Jason Hanna		
<input type="checkbox"/>	31400915	Eva Varner	Jason Hanna		
<input type="checkbox"/>	31400910	Gordon Blackburn	Jason Hanna		
<input type="checkbox"/>	31400912	Julie Ortman	Jason Hanna		

**CURRENT STATUS**  
Review In Progress

**RELATED ITEMS**  
Job Posting

4. The application will display including contact information, work experience, education and other information. Click the Questions tab to review the candidate's answers to agency-wide and job-specific supplemental questions. Similarly, click the E-References tab to review feedback provided by reference contacts.

**Carla Newman**  
Person ID: 31400911 NA

**Next →** **☆ Rate** **Print** **Cancel**

**Application** **Questions** **E-References**

**QUICK JUMP...**

- General Information**
- Work Experience**
- Education**
- Additional Information**
- References**
- Attachments**

**General Information**

123 Main Street  
Los Angeles, CA 90001

cnewman@mailprovider.net

**Notification Preference**  
E-mail

**Preferences**  
What shifts are you available to work?

5. ~~Once you're ready to rate the candidate, click Rate.~~
6. ~~Like the previous version of the OHC, you have three ratings in a pass/fail setting: Pass, Fail and Other. Click one of these ratings, enter any comments and then click Save.~~

Carla Newman  
Person ID : 31400911

Cancel Save

Please rate Carla Newman

Pass

Fail

Other

Overall Comments

Excellent candidate. Lots of recent experience in the field.

~~In a scored setting, enter your score, enter any comments and then click Save.~~

Carla Newman  
Person ID : 31400911

Cancel Save

Overall Comments

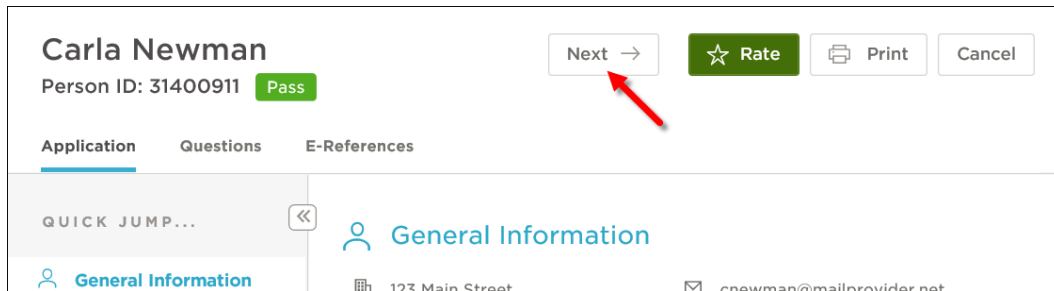
Excellent candidate. Lots of recent experience in the field.

Maria's Rating

YOUR SCORE 95

Experience score: 50 out of 50  
Education score: 45 out of 50

7. ~~Click Next to proceed to the next candidate pending your review.~~



**Carla Newman**  
 Person ID: 31400911 Pass

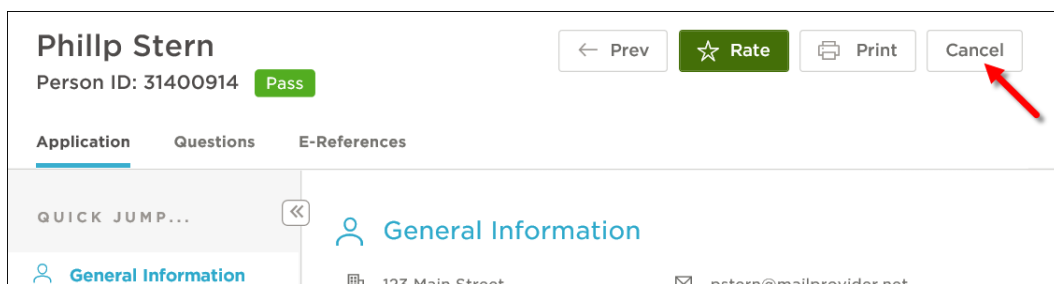
Next → ☆ Rate Print Cancel

Application Questions E-References

QUICK JUMP... << [General Information](#)

[General Information](#) 123 Main Street cnewman@mailprovider.net

8. ~~Repeat these rating steps until Next no longer displays. Click Cancel or click anywhere to the left of the last candidate's application review page.~~



**Phillp Stern**  
 Person ID: 31400914 Pass

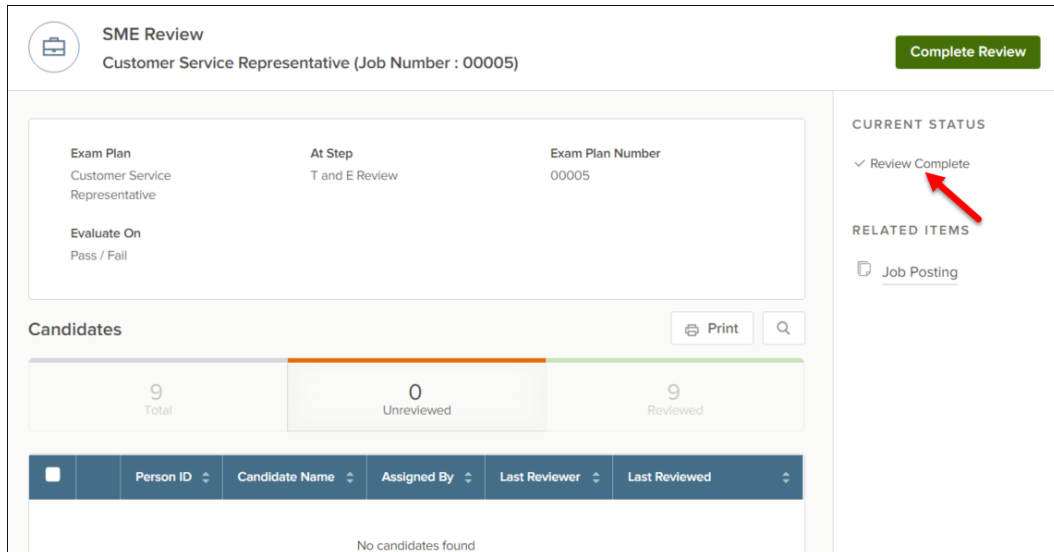
← Prev ☆ Rate Print Cancel

Application Questions E-References

QUICK JUMP... << [General Information](#)

[General Information](#) 123 Main Street pstern@mailprovider.net

9. ~~Notice you have no unreviewed candidates and your SME review status is complete.~~



**SME Review**  
 Customer Service Representative (Job Number : 00005) Complete Review

Exam Plan	At Step	Exam Plan Number
Customer Service Representative	T and E Review	00005

Evaluate On: Pass / Fail

**Candidates** Print Search

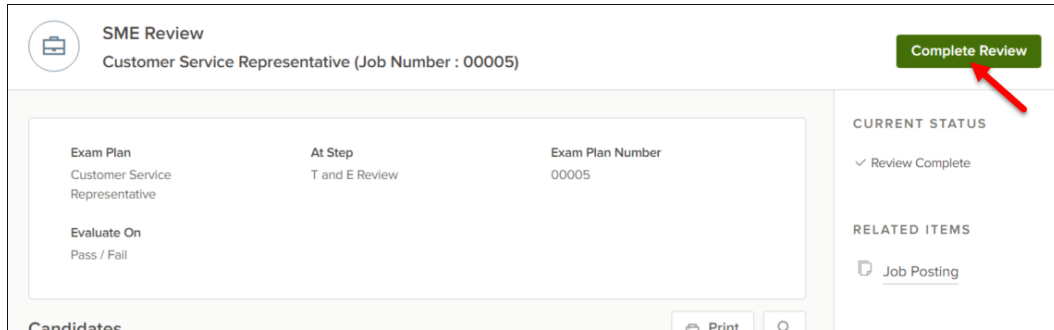
Total	Unreviewed	Reviewed
9	0	9

Person ID	Candidate Name	Assigned By	Last Reviewer	Last Reviewed
No candidates found				

**CURRENT STATUS**  
 ✓ Review Complete

**RELATED ITEMS**  
 Job Posting

10. Click Complete Review and then click OK to notify, via email, the assigned recruiter and other subject matter experts that you have completed your review.



**SME Review**  
Customer Service Representative (Job Number : 00005)

**Complete Review**

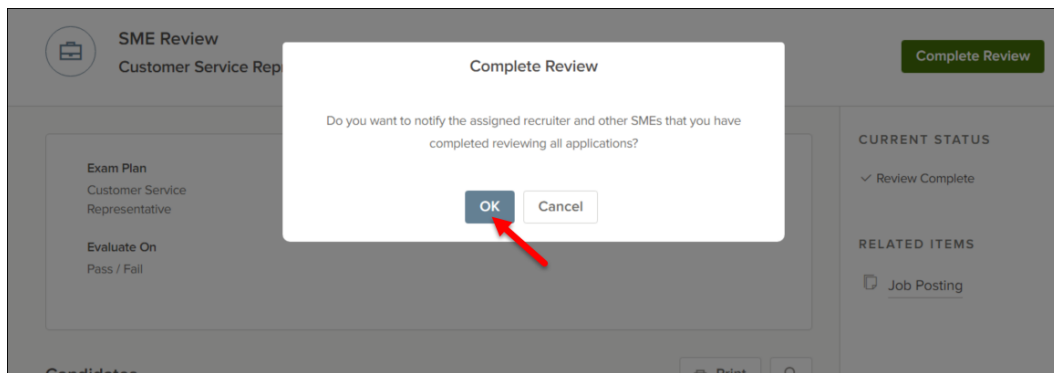
Exam Plan	At Step	Exam Plan Number
Customer Service Representative	T and E Review	00005

Evaluate On  
Pass / Fail

**CURRENT STATUS**  
✓ Review Complete

**RELATED ITEMS**  
[Job Posting](#)

[Print](#)



**SME Review**  
Customer Service Rep

**Complete Review**

Do you want to notify the assigned recruiter and other SMEs that you have completed reviewing all applications?

**OK** **Cancel**

**Complete Review**

Exam Plan	At Step	Exam Plan Number
Customer Service Representative	T and E Review	00005

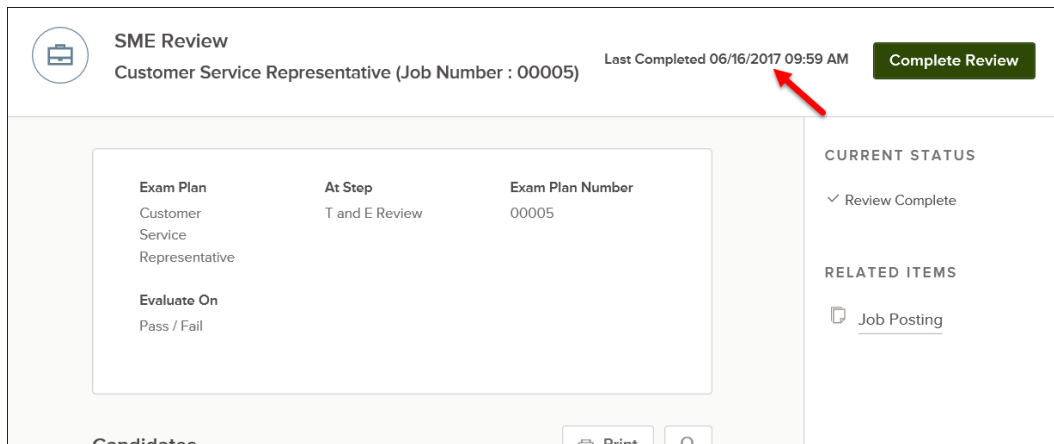
Evaluate On  
Pass / Fail

**CURRENT STATUS**  
✓ Review Complete

**RELATED ITEMS**  
[Job Posting](#)

[Print](#)

The date and time of your last completed review notification will display.



**SME Review**  
Customer Service Representative (Job Number : 00005)

Last Completed 06/16/2017 09:59 AM

**Complete Review**

Exam Plan	At Step	Exam Plan Number
Customer Service Representative	T and E Review	00005

Evaluate On  
Pass / Fail

**CURRENT STATUS**  
✓ Review Complete

**RELATED ITEMS**  
[Job Posting](#)

[Print](#)

11. If additional candidates are sent to you in the future, complete the review, and then click Complete Review, to once again notify the assigned recruiter and other subject matter experts of your completed review.

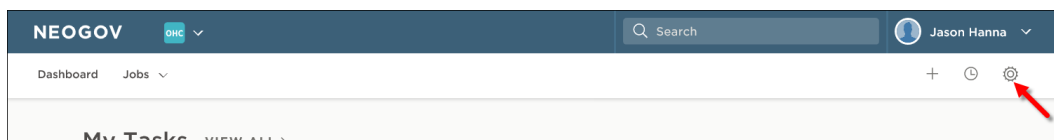
## Set up a Rater

In the previous version, if you were given the OHC role of Hiring Manager, you could extend an offer and hire a candidate or fail them after an interview. Now, with the new OHC role of Rater, you can rate candidates on a referred list based on a star rating, pass/fail and scored methods. Since the OHC role is completely new, you'll need to set up at least one rater to try it out.

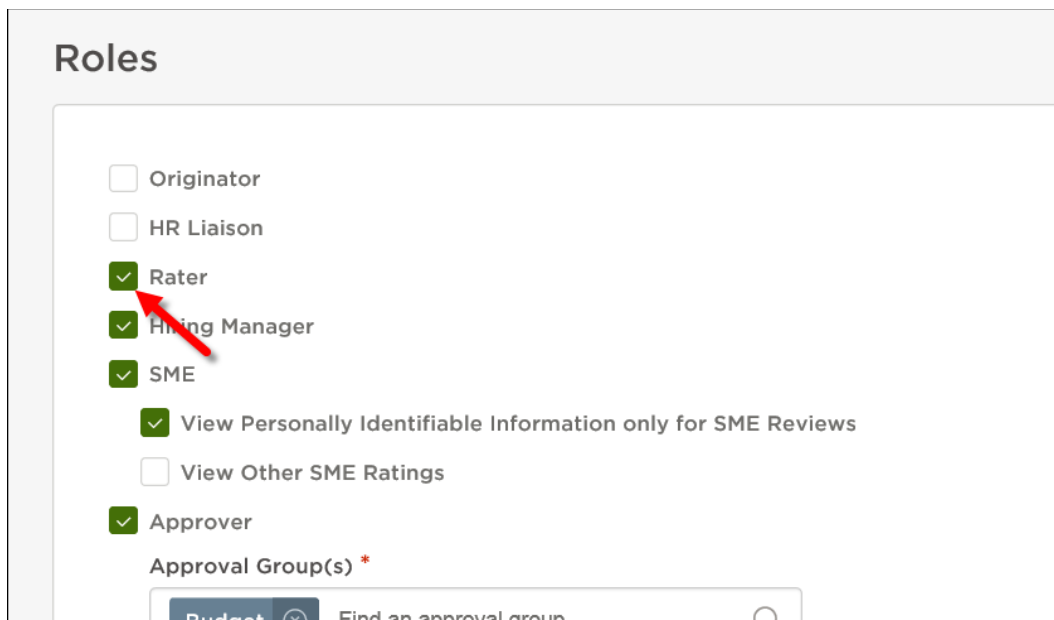
With the OHC role of HR Liaison and the Allow Liaison to Maintain OHC Users permission selected (Insight navigation: Admin > Agency Preferences > OHC Security), you can set up a rater.

### Steps to Set up a Rater

1. From the upper right, click the Settings button. It looks like a gear.



2. Click Users and click the name of a user that will have the OHC role of Rater.
3. Click Edit and select Rater.



4. Once you're done, click Save.
5. Repeat these steps for any additional users that will have the OHC role of Rater.

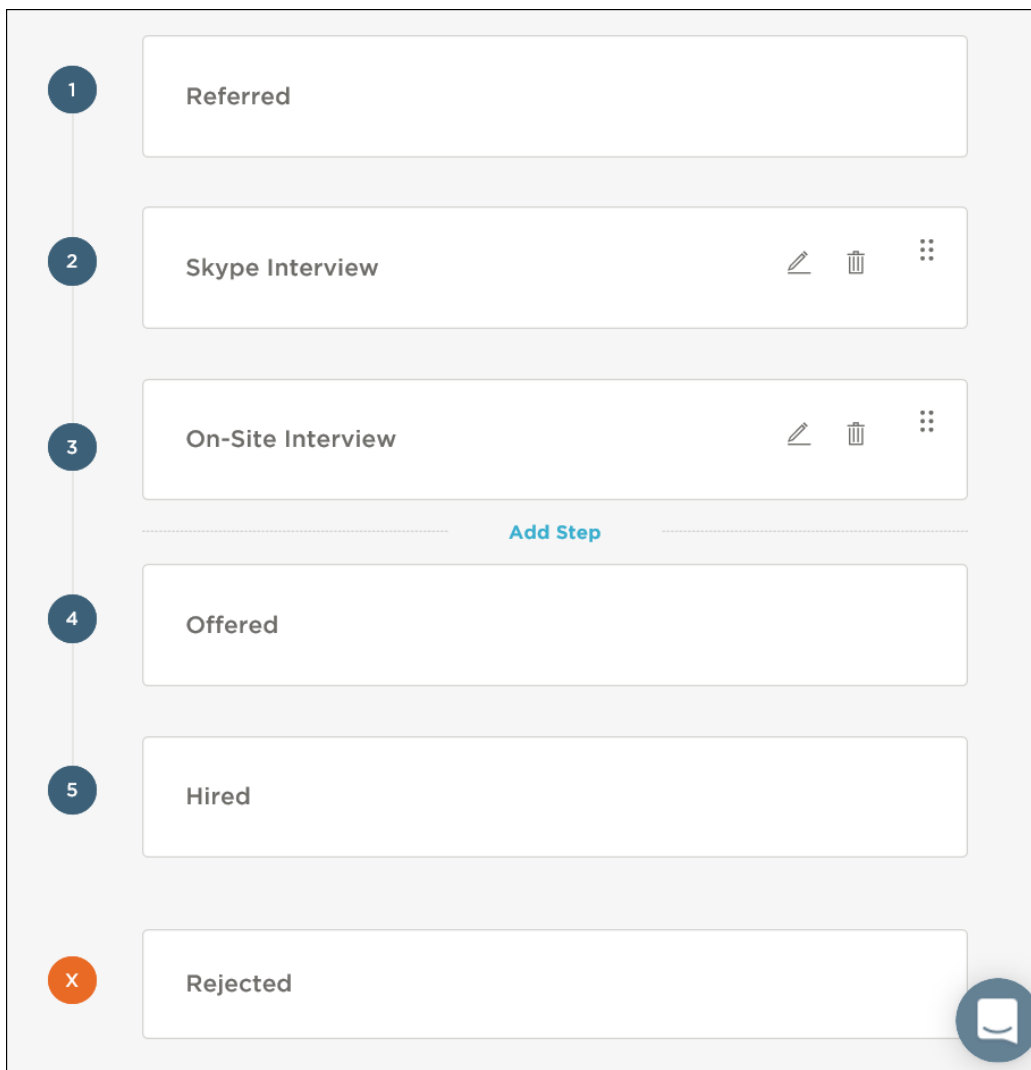
## Customize a Hire Workflow

With the OHC role of Hiring Manager or HR Liaison you can customize a hire workflow.

In the previous version of the OHC, candidates on a referred list traveled through a total of five preset hire workflow steps including initial referral, interview, offer, hire and rejection.

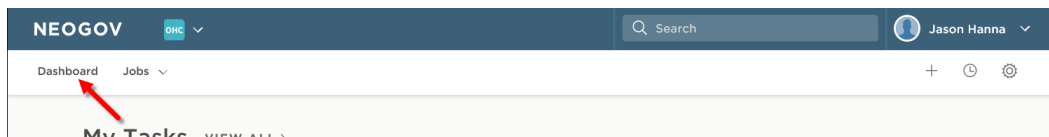
Referred ( 7 )		Interview Scheduled ( 0 )	Offer Pending ( 0 )	Hired ( 0 )	Rejected ( 0 )			
<input type="checkbox"/>	Name	Referral Code	Master Profile	Action Date	Email Notify	Notices	Referral Expires	Elig List Type
<input type="checkbox"/>	<a href="#">Barajas, Sandro</a>	000015	<a href="#">View</a>	05/02/16		N/A	2/29/2016	Normal
<input type="checkbox"/>	<a href="#">Daniels, Paula</a>	000015	<a href="#">View</a>	05/02/16	*	N/A	2/29/2016	Normal
<input type="checkbox"/>	<a href="#">Farquison, Randy</a>	000015	<a href="#">View</a>	05/02/16		N/A	2/29/2016	Normal
<input type="checkbox"/>	<a href="#">Hansen, James</a>	000015	<a href="#">View</a>	05/02/16		N/A	2/29/2016	Normal
<input type="checkbox"/>	<a href="#">Mattix, Armando</a>	000015	<a href="#">View</a>	05/02/16		N/A	2/29/2016	Normal
<input type="checkbox"/>	<a href="#">Newman, Bettina</a>	000015	<a href="#">View</a>	05/02/16		N/A	2/29/2016	Normal
<input type="checkbox"/>	<a href="#">Pearson, Albert</a>	000015	<a href="#">View</a>	05/02/16		N/A	2/29/2016	Normal

These preset steps still exist in the new OHC and now you can add additional pre-offer steps; creating your own customized hire workflow.

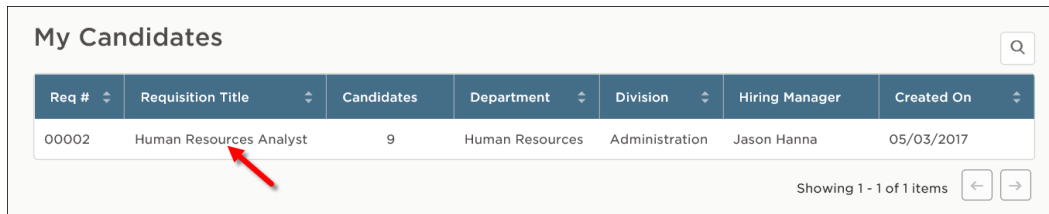


## Steps to Customize a Hire Workflow

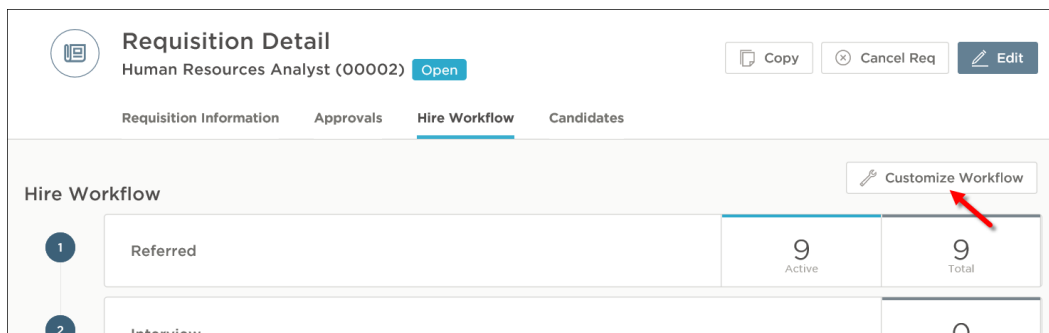
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.





2. From the My Candidates section, click the referred list that will have a custom hire workflow.



3. Click the Hire Workflow tab and click Customize Workflow.






- From the Interview step, click . This will be the step to immediately follow the referral of candidates. Update the step name, rating method, scale and pass point. Also, if you know who will be conducting the interviews, click , select the applicable rater(s), and then click Done.

### Step Details

Name \*

Display Status to Candidate As

Raters

Simon Davies 

- Start typing to find a rater -

Comment

Evaluate Using

☐ Pass/Fail

☒ Star Rating


☐ Percentage

Scale

☒ 5 Stars

☐ 10 Stars

Pass Point

 3 Stars

- Once you're done, click Save & Continue to set up pre-configured interview slots for scheduling.

Note: If you're not yet ready to set up interview slot, click Save & Close and return back later.

- From the Pre-Configure Interview Slots switch, click to the on setting.
- Will candidates be allowed to sign back into Career Pages and self-schedule for interviews? If so, enable self-scheduling! From Allow Candidate Self-Scheduling switch, click to the on setting.

- Continue with setting up the interview slots including: locations(s), date(s), times and breaks. The preview pane will conveniently display your interview slots, per day, based on the lengths of time.

## Appointment Scheduling

Pre-Configure Interview Slots ☒

Allow Candidate Self-Scheduling ☒

### 1 Select Location(s)

County Administration Building

Start typing to find a location...

### 2 Select Available Dates

October 2017

Su	Mo	Tu	We	Th	Fr	Sa
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

October 25, 2017

October 23, 2017

October 27, 2017

### 3 Select Times

Start Time

10:00 AM

to

End Time

3:30 PM

Duration \*

45 min

Time Between Slots \*

15 min

### 4 Add Breaks

Starts

12:00 PM

Ends

1:00 PM

Starts

2:00 PM

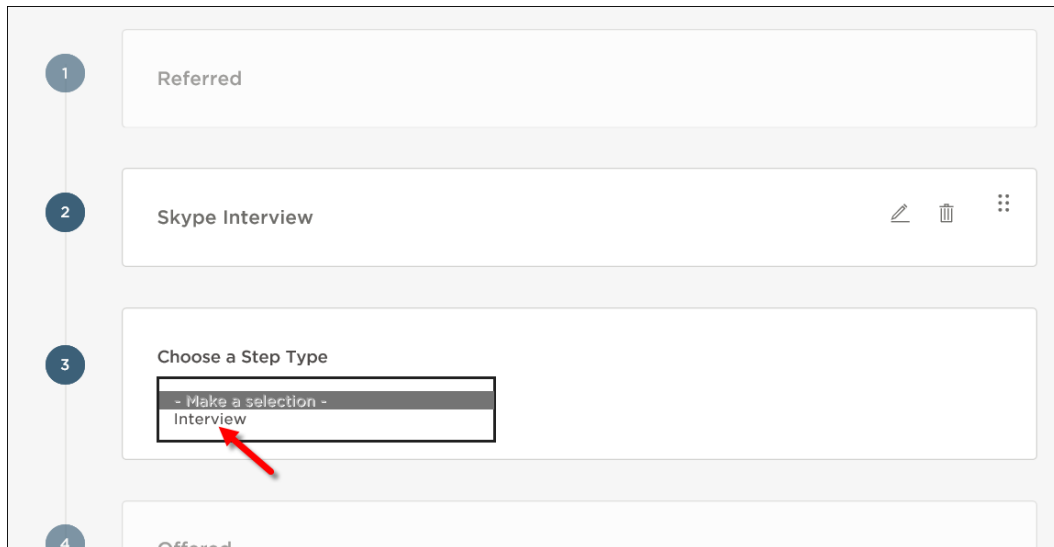
Ends

2:30 PM

10AM	10:00 AM - 10:45 AM	Appointment Slot 1
11AM	11:00 AM - 11:45 AM	Appointment Slot 2
12PM	12:00 PM - 1:00 PM	Break 1
1PM	1:00 PM - 1:45 PM	Appointment Slot 3
2PM	2:00 PM - 2:30 PM	Break 2
	2:30 PM - 3:15 PM	Appointment Slot 4
3PM		

- Once you're done, click Save & Close.

10. Will there be another pre-offer step? If so, click Add Step and select Interview.



1 Referred



2 Skype Interview

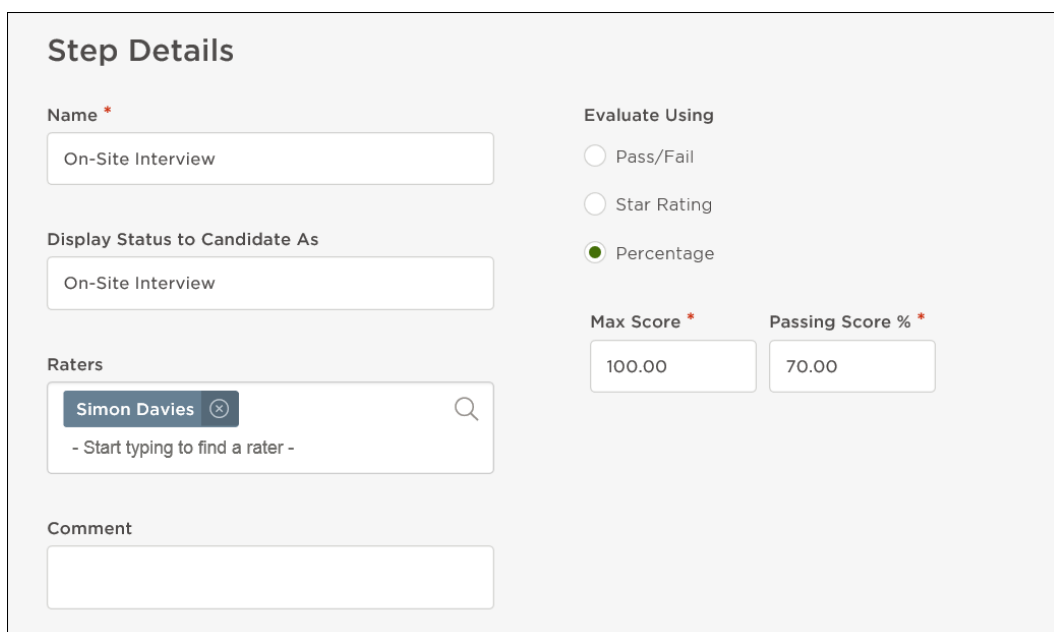
3 Choose a Step Type

- Make a selection -

Interview

4 Offered

11. Once again, from the Interview step, click . Update the step name, rating method, scale and pass point. Also, if you know who will be conducting the interviews, click , select the applicable rater(s), and then click Done.



### Step Details


**Name \***

On-Site Interview

**Display Status to Candidate As**

On-Site Interview

**Raters**

Simon Davies 

- Start typing to find a rater -

**Comment**

**Evaluate Using**

☐ Pass/Fail

☐ Star Rating

☒ Percentage

**Max Score \***

100.00

**Passing Score % \***

70.00

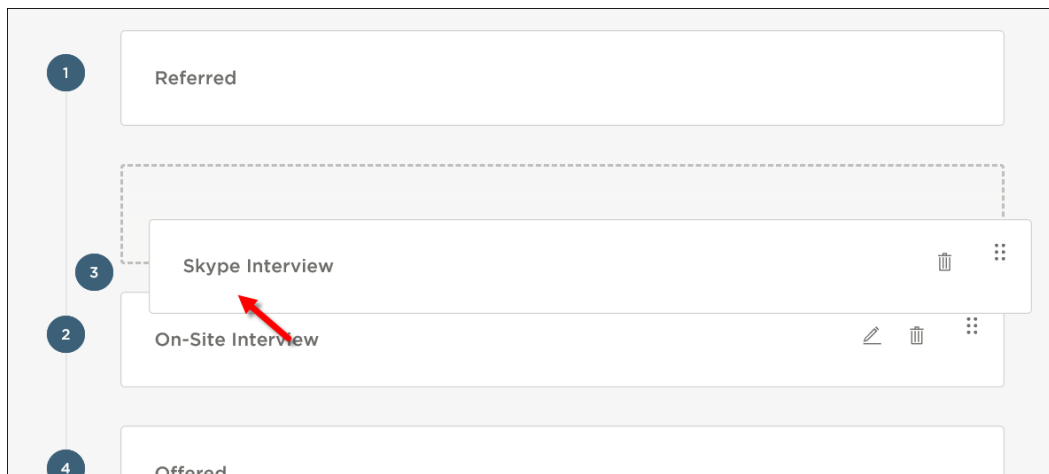
12. Once you're done, click Save & Continue to set up pre-configured interview slots for scheduling.

13. Repeat steps 6 through 9 to set up interview slots.

Note: This guide illustrates an example of two-interview process: a Skype interview and an on-site interview. Of course, this example only scratches the surface of all the custom workflows that you can create. Although the step type is referred to as an “interview,” it can be used for any type of pre-offer assessment. E.g., a performance exam or an agility test.

14. Repeat these steps for any additional pre-offer hire workflow steps.

15. Are your hire workflow steps in the proper order? If not, you can easily correct with a drag-and-drop operation.



16. Once you're done, click Close.

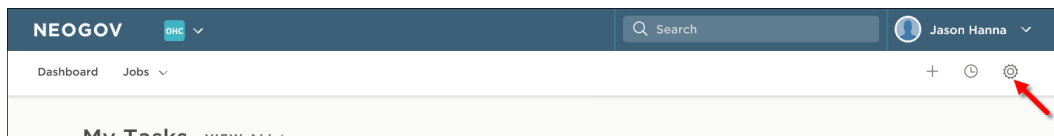
## Set up a Notice Template

With the OHC permission of Create OHC Notice Templates you can create a notice template for your assigned department(s)/division(s).

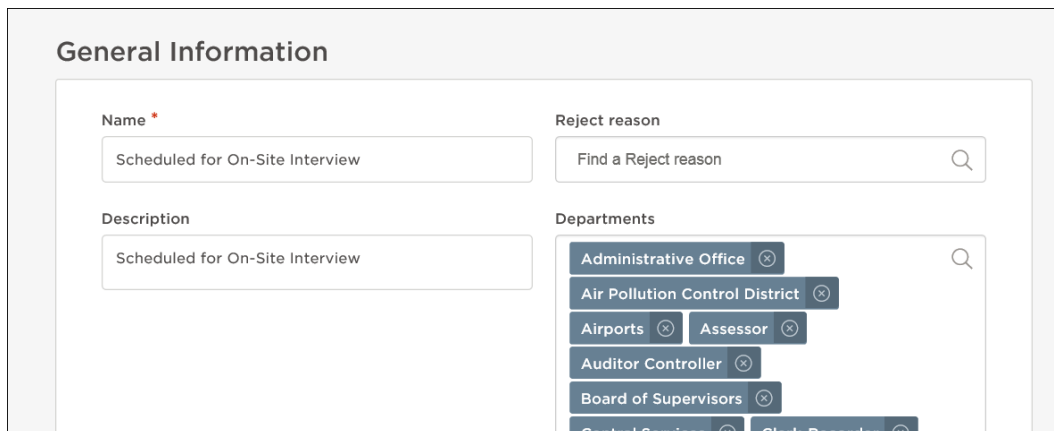
Notice templates can be used for a variety of notice types including interview scheduling, assessment results, candidate rejection and job offer.

### Steps to Set up a Notice Template

1. From the upper right, click the Settings button. It looks like a gear.



2. Click Notice Templates and click Add.
3. The first of two notice template pages will display.



4. Complete the notice template page and click Save & Continue to Next Step.

5. Type the contents of your notice template. When a merge field is required, locate it using left-side search and then drag to the proper area of the notice. Also, drag any applicable files to the attachments section.

**Create Notice Template** Cancel Save & Close

1. GENERAL ✓ **2. COMPOSE NOTICE**

**APPLICANT**

First Name Last Name  
Middle Name Address 1  
Address 2 City  
State Zip Code  
Country Home Phone  
Other Phone Person ID

**USER** >  
**AGENCY** >  
**POSITION** >  
**REQUISITION** >  
**REFERRAL** >  
**REFERRED LIST - INTERVIEW** >  
**REFERRED LIST - OFFERED** >  
**REFERRED LIST - HIRED** >  
**REFERRED LIST - REJECTED** >  
**GENERAL** >

Hello <Applicant\_FirstName> <Applicant\_LastName>.

Thank you for submitting your application for the position of <Position\_Title>, with our <Position\_Department> Department.

Great news! You've been scheduled to attend an on-site with our hiring department staff.

Below are all the details you need including where and when. We've also attached a driving instructions map to making finding our offices easy.

Location:  
<ReferredInterview\_LocationTitle>  
<ReferredInterview\_Address1>  
<ReferredInterview\_City>, <ReferredInterview\_State> <ReferredInterview\_ZipCode>

Date: <ReferredInterview\_DateInterviewStart>  
Start time: <ReferredInterview\_TimeInterviewStart>  
End time: <ReferredInterview\_TimeInterviewEnd>

We look forward to meeting you soon!

<User\_FirstName> <User\_LastName>  
<User\_Title>  
<User\_Phone>

Drag and drop your file here, or [browse](#)

Supported file types are .doc, .docx, .gif, .jpg, .pdf, .png, .ppt, .pptx, .rtf, .txt

[Map to](#) [Move](#)

Note: In the previous version of the OHC, inserting a merge field was a process of either typing or copying and pasting, from left angle bracket (<) to right angle bracket (>), e.g., <Applicant\_LastName>. With the new OHC, dragging the merge field to the notice body is required. Typing or copying and pasting the merge field will not work properly.

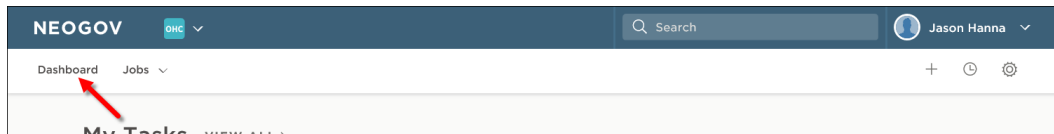
6. Once you're done, click Save & Close.

## Schedule Interviews

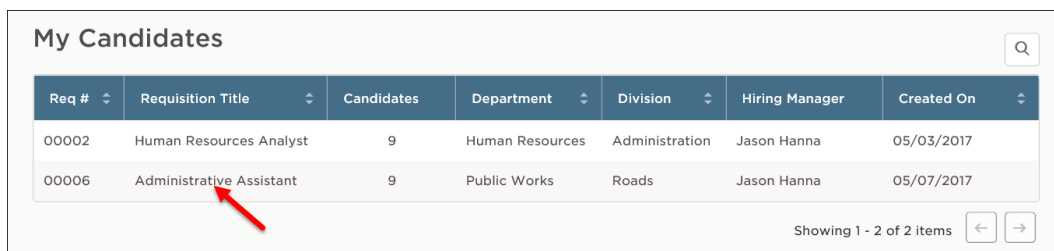
With the OHC role of Hiring Manager or HR Liaison you can schedule interviews.

### Steps to Schedule Interviews

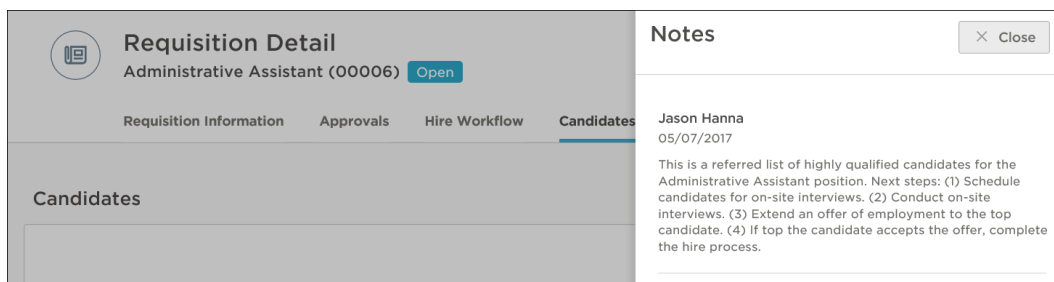
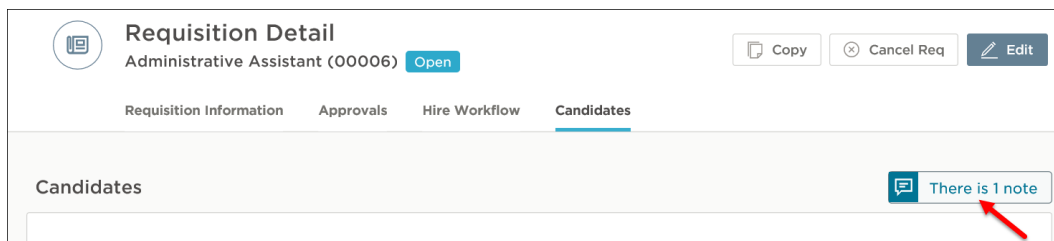
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. From the My Candidates section, click the referred list that will have scheduled interviews.

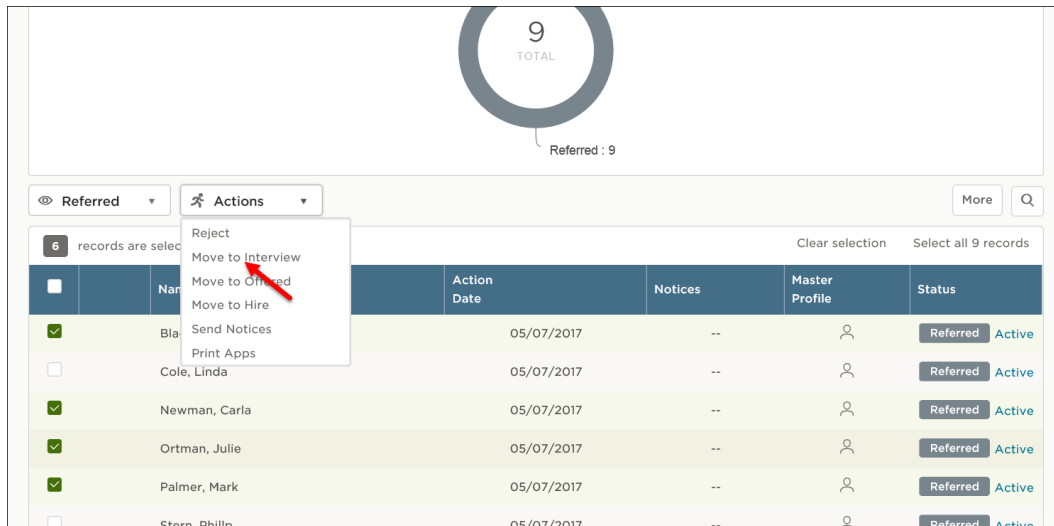


Note: If the HR staff member left one or more notes on the referred list for you, a button will display indicating the number of notes available to read.



3. Select the candidates that will be moved to the interview step.

- On the Actions menu, click Move to Interview.

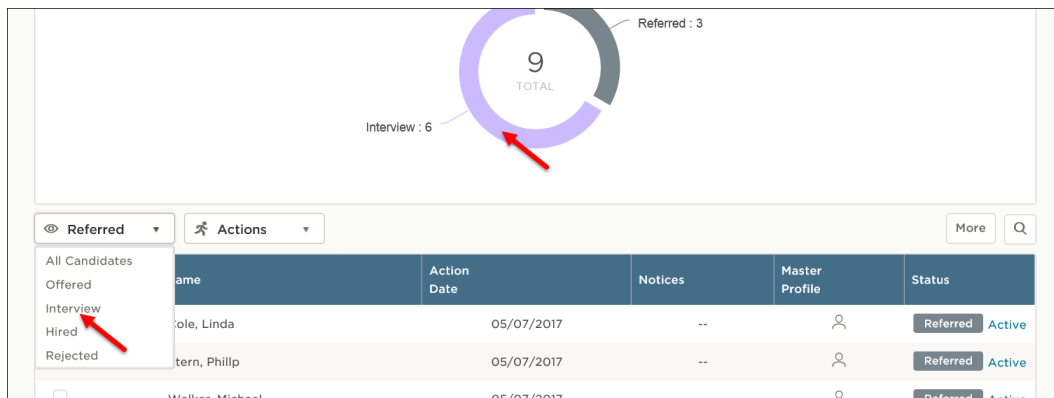


The screenshot shows the NEOGOV interface with a doughnut chart at the top indicating 9 total candidates, with 9 referred. Below the chart, a table lists candidates in the 'Referred' status. The 'Actions' menu is open, and 'Move to Interview' is highlighted with a red arrow.

	Name	Action Date	Notices	Master Profile	Status
<input checked="" type="checkbox"/>	Blair, Linda	05/07/2017	--		Referred Active
<input type="checkbox"/>	Cole, Linda	05/07/2017	--		Referred Active
<input checked="" type="checkbox"/>	Newman, Carla	05/07/2017	--		Referred Active
<input checked="" type="checkbox"/>	Ortman, Julie	05/07/2017	--		Referred Active
<input checked="" type="checkbox"/>	Palmer, Mark	05/07/2017	--		Referred Active
<input type="checkbox"/>	Stern, Phillip	05/07/2017	--		Referred Active

Note: Your hire workflow may have a customized name for the interview step, e.g., On-Site Interview. If so, click the customize name to move the candidates to that step.

- Click OK to confirm moving the candidates.
- The selected candidates have been moved from the referred step to the interview step. To see them again, the view must be switched to the interview step candidates. On the doughnut chart, click Interview, or on the Candidates menu, click Interview.



The screenshot shows the NEOGOV interface with a doughnut chart at the top indicating 9 total candidates, with 3 referred and 6 in the interview step. Below the chart, a table lists candidates in the 'Interview' status. The 'Candidates' menu is open, and 'Interview' is highlighted with a red arrow.

	Name	Action Date	Notices	Master Profile	Status
<input type="checkbox"/>	Cole, Linda	05/07/2017	--		Referred Active
<input type="checkbox"/>	Stern, Phillip	05/07/2017	--		Referred Active
<input type="checkbox"/>	Walker, Michael	05/07/2017	--		Referred Active



- From the first candidate to be scheduled for an interview, click **Unscheduled**.

<input type="checkbox"/>	Name	Action Date	Notices	Master Profile	Status	Rating
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--		<a href="#">Interview</a> <a href="#">Unscheduled</a>	<a href="#">No Rating</a>
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		<a href="#">Interview</a> <a href="#">Unscheduled</a>	<a href="#">No Rating</a>
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--		<a href="#">Interview</a> <a href="#">Unscheduled</a>	<a href="#">No Rating</a>

- If you do not have pre-configured interviewed slots, a full-detail schedule form will display including date, time, location and interviewer(s). Complete the form and click **Save**.

### Interview Details

**Interview Date \***

**Location**

**Start Time**

**End Time**

**Interviewer**

Pacific Time (US & Canada); Tijuana

< October 17, 2017 > Today Month Week Day

- If you have pre-configured interview slots, you will only need to select the location and date/time. Once you're done, click **Schedule**.

9 TOTAL  
Interview : 6

Interview

Actions

<input type="checkbox"/>	Name	Action Date	Notices	Master Profile
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--	
<input type="checkbox"/>	Newman, Carla	05/08/2017	--	
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--	
<input type="checkbox"/>	Palmer, Mark	05/08/2017	--	
<input type="checkbox"/>	Verger, Eva	05/08/2017	--	

### Schedule Interview

**Interview Location \***

TUESDAY, OCTOBER 17, 2017

THURSDAY, OCTOBER 19, 2017

- Repeat these steps to schedule the remaining candidates for interviews.

## Send Notices

With the OHC role of Hiring Manager or HR Liaison and the OHC permission of Send OHC Notices, you can send notices.

### Steps to Send Notices

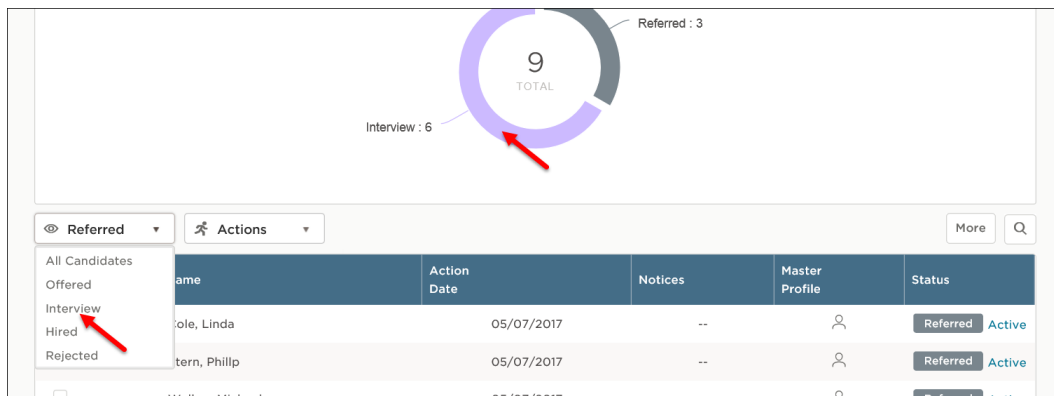
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

**My Candidates** Q

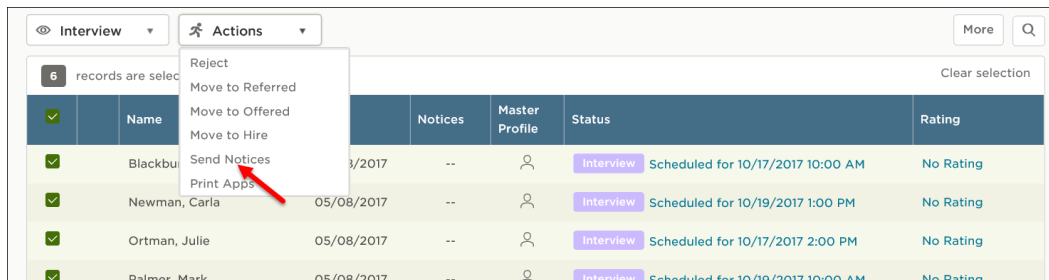
Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items ← →

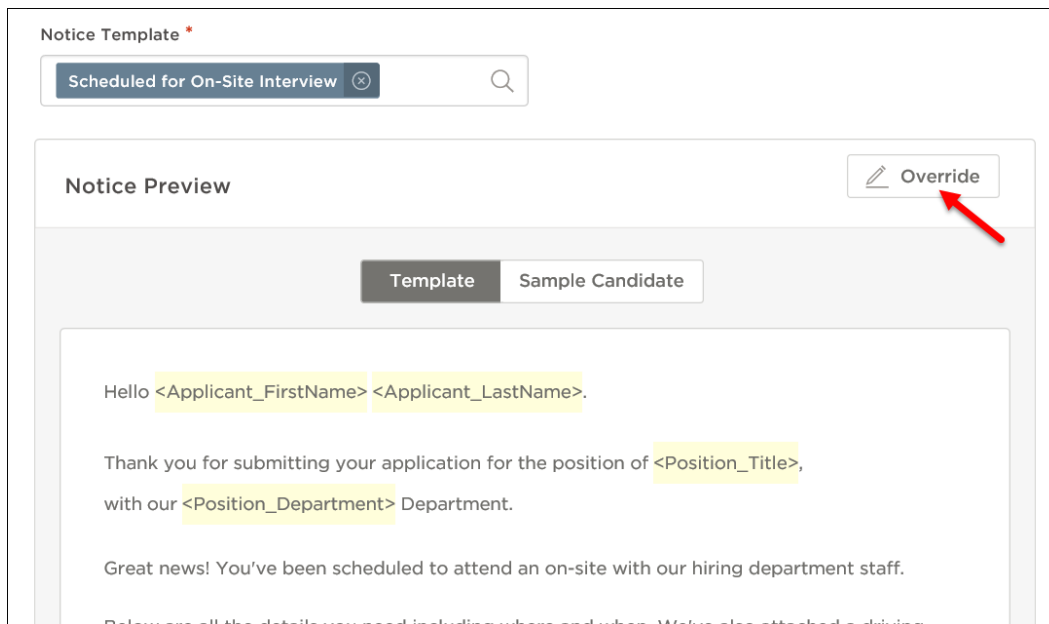
2. On the doughnut chart or on the Candidates menu, click the step name where candidates require notification.



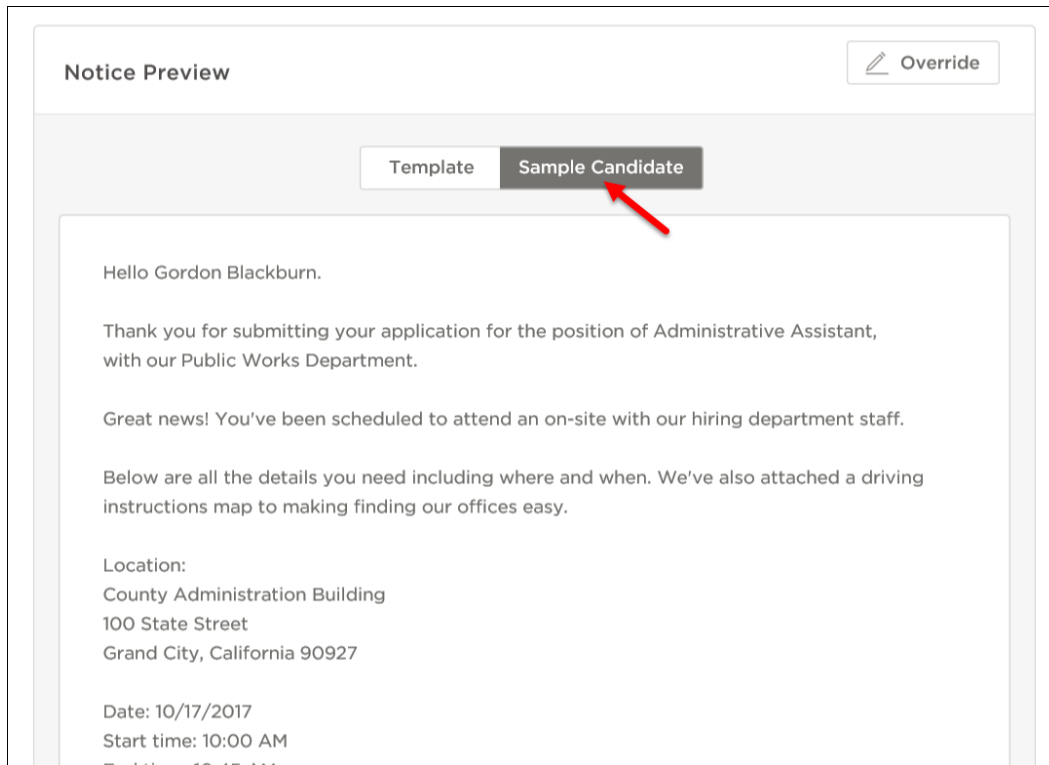
3. Select the candidates to receive notices.
4. On the Actions menu, click Send Notices.



5. Select a notice template.
6. If necessary, click Override to make a one-time update to the notice prior to sending. This update will not affect the saved notice template.



- Click Sample Candidate to view the notice with merged text.

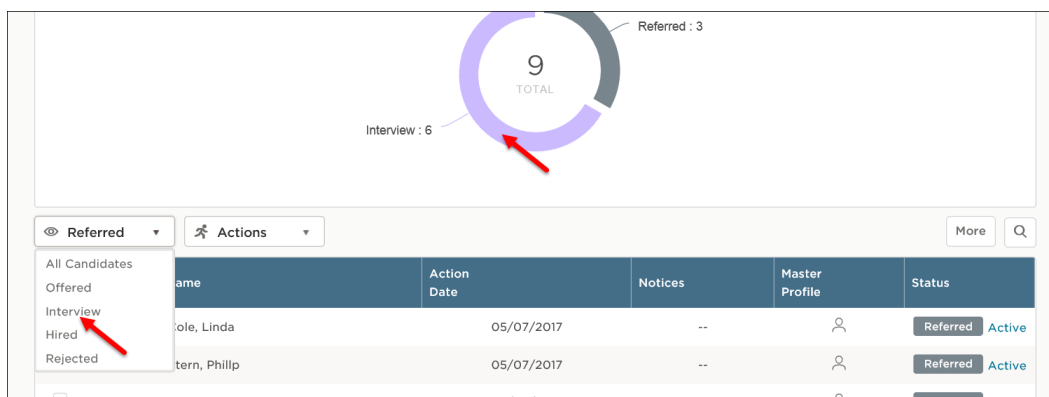


- Click Send to send the notice to all selected candidates.

## Steps to Send an Individual Notice

Rather than sending notices in bulk, you can send an individual candidate a notice. This practice may come in handy if each candidate notice must have its own personalized verbiage.

- Go to your referred list.
- On the doughnut chart or on the Candidates menu, click the step name a candidate requires a notification.



- Click the name of the candidate to receive the notice.

<input type="checkbox"/>	Name	Action Date	Notices	Master Profile	Status	Rating
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--		<a href="#">Interview</a> Scheduled for 10/17/2017 10:00 AM	No Rating
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		<a href="#">Interview</a> Scheduled for 10/19/2017 1:00 PM	No Rating
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--		<a href="#">Interview</a> Scheduled for 10/17/2017 2:00 PM	No Rating
<input type="checkbox"/>	Palmer, Mark	05/08/2017	--		<a href="#">Interview</a> Scheduled for 10/19/2017 10:00 AM	No Rating

- On the Actions menu, click Send Notices.

Carla Newman

Person ID: 31400911 [Interview](#)

← Prev

Next →

[Actions](#)

Print

Cancel

Application

Questions

E-References

Notices

History

QUICK JUMP...

General Information

Work Experience

Education

General Information

123 Main Street

Los Angeles, CA 90001

Reject

Move to Referred

Move to Offered

Move to Hire

Send Notices

Schedule interview

Rate

- Select a notice template.
- If necessary, click Override to make a one-time update to the notice prior to sending. This update will not affect the saved notice template.
- Click Sample Candidate to view the notice with merged text.

Notice Template \*

Scheduled for On-Site Interview

×

Q

Notice Preview

Override

Template

Sample Candidate

Hello Carla Newman.

Thank you for submitting your application for the position of Administrative Assistant, with our Public Works Department.

Great news! You've been scheduled to attend an on-site with our hiring department staff.

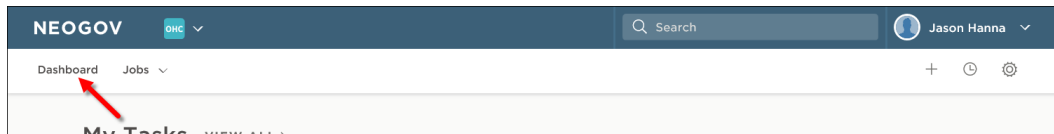
- Click Send to send the notice to the candidate.

## Rate an Interview

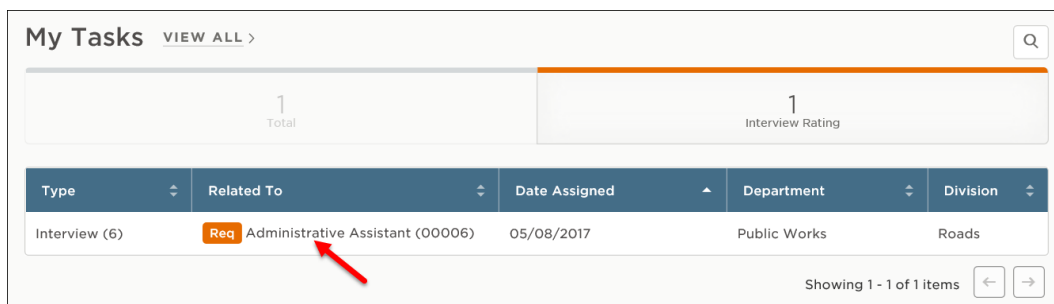
With the OHC role of Rater, you can rate an interview.

### Steps to Rate an Interview

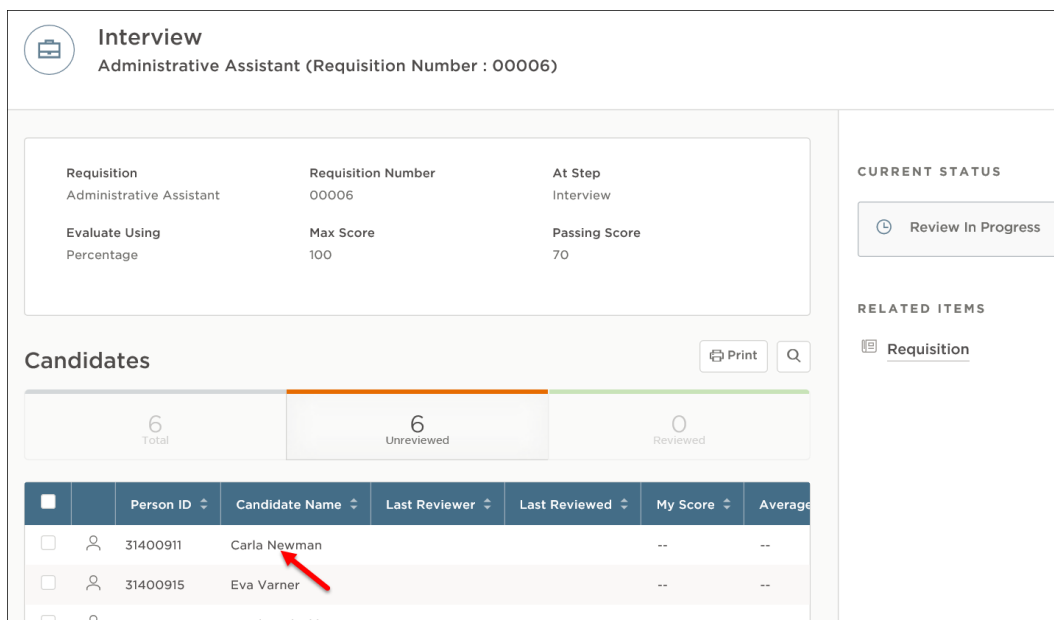
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



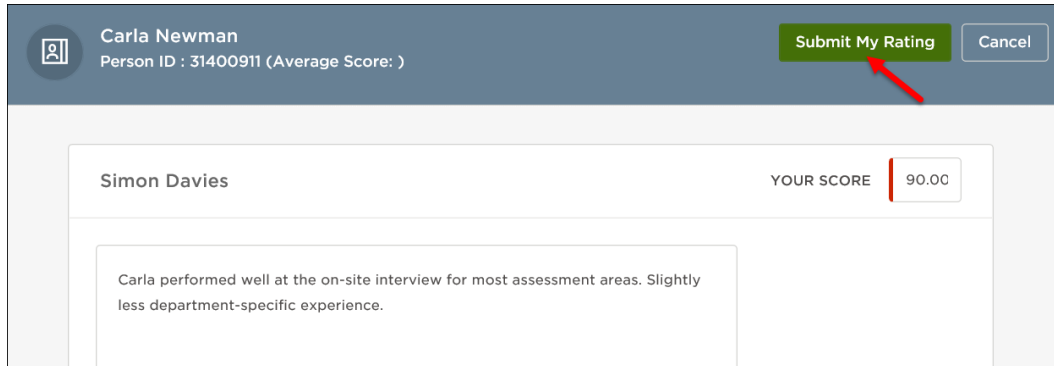
2. From the My Tasks section, click the interview rating pending your review.



3. Click the name of the first candidate to be rated.



- Click Rate and enter your rating. Depending on how the step is configured, this can be a pass or fail, a star rating, or a numeric value. Also, enter any comments and click Submit My Rating.



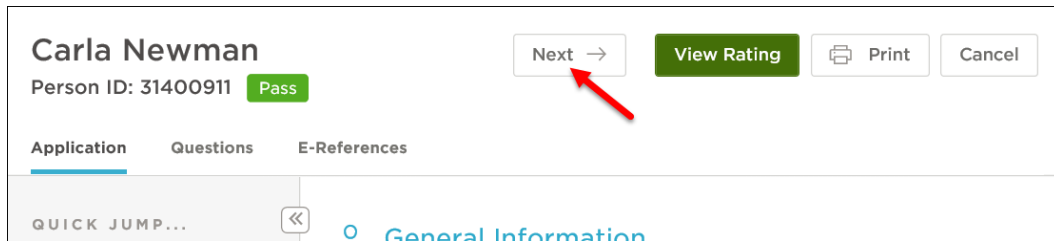
Carla Newman  
Person ID : 31400911 (Average Score: )

**Submit My Rating** **Cancel**

Simon Davies YOUR SCORE 90.00

Carla performed well at the on-site interview for most assessment areas. Slightly less department-specific experience.

- Click Next to proceed to the next candidate pending your rating.



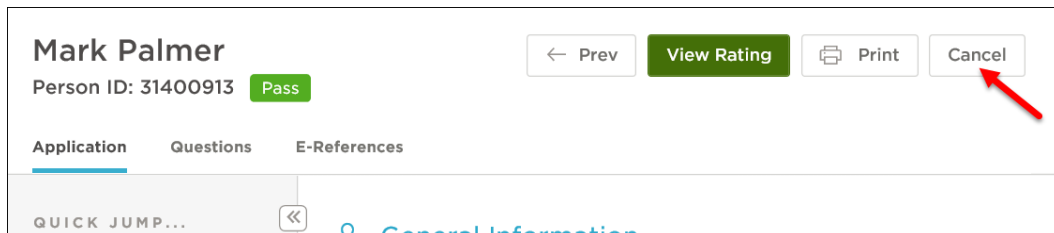
Carla Newman  
Person ID: 31400911 **Pass**

**Next** **View Rating** **Print** **Cancel**

**Application** **Questions** **E-References**

QUICK JUMP... [General Information](#)

- Repeat these rating steps until Next no longer displays. Click Cancel or click anywhere to the left of the last candidate's application review page.



Mark Palmer  
Person ID: 31400913 **Pass**

**Prev** **View Rating** **Print** **Cancel**

**Application** **Questions** **E-References**

QUICK JUMP... [General Information](#)

- Notice you have no unreviewed candidates and your review status is complete.

**Interview**  
Administrative Assistant (Requisition Number : 00006)

Requisition Administrative Assistant	Requisition Number 00006	At Step Interview
Evaluate Using Percentage	Max Score 100	Passing Score 70

**Candidates**

Print
Q

6  
Total
0  
Unreviewed
6  
Reviewed

	Person ID	Candidate Name	Last Reviewer	Last Reviewed	My Score	Average
No candidates found						

**CURRENT STATUS**  

✓ Review Complete

**RELATED ITEMS**  

Requisition

- After the rating is complete, you can view the results from the workflow step.

**Candidates**

Print
Q

6  
Total
0  
Unreviewed
6  
Reviewed

	Person ID	Candidate Name	Last Reviewer	Last Reviewed	My Score	Average Score
<input type="checkbox"/>	31400911	Carla Newman	Simon Davies	05/08/2017	90.00%	Pass 90.00%
<input type="checkbox"/>	31400915	Eva Varner	Simon Davies	05/08/2017	85.00%	Pass 85.00%
<input type="checkbox"/>	31400910	Gordon Blackburn	Simon Davies	05/08/2017	60.00%	Fail 60.00%
<input type="checkbox"/>	31400912	Julie Ortman	Simon Davies	05/08/2017	75.00%	Pass 75.00%
<input type="checkbox"/>	31400917	Kelley Vaughan	Simon Davies	05/08/2017	90.00%	Pass 90.00%

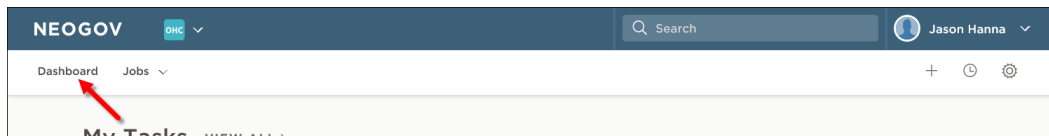


## Reject a Candidate

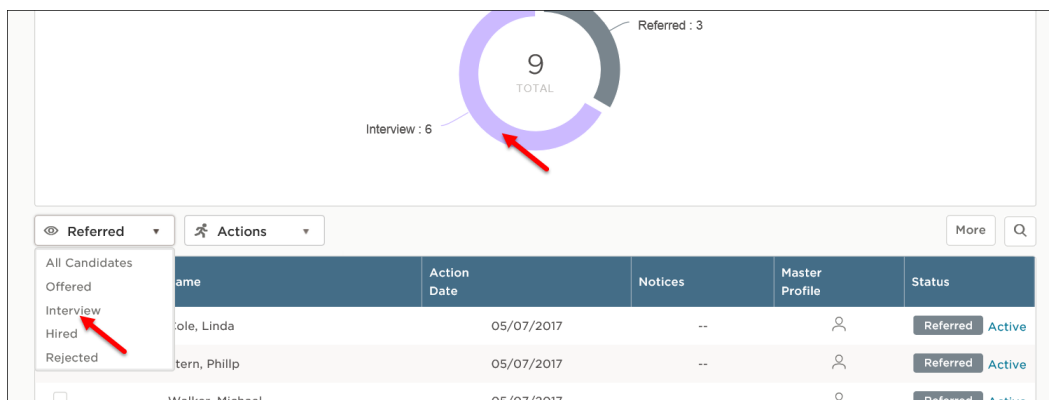
With the OHC role of Hiring Manager or HR Liaison, you can reject a candidate.

### Steps to Reject a Candidate

1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.



2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and determined one or more will be rejected.



- Click the name of the first candidate to be rejected.

<input type="checkbox"/>	Name	Action Date	Notices	Master Profile	Status	Rating
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--		Interview Scheduled for 10/17/2017 1...	Fail 60.00%
<input type="checkbox"/>	Newman, Carlo	05/08/2017	--		Interview Scheduled for 10/19/2017 1...	Pass 90.00%
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--		Interview Scheduled for 10/17/2017 2...	Pass 75.00%
<input type="checkbox"/>	Palmer, Mark	05/08/2017	--		Interview Scheduled for 10/19/2017 1...	Pass 85.00%

- On the Actions menu, click Reject.

Douglas Haddad

Person ID: 21987280 Skype Interview / Fail

← Prev

Next →

Actions

Print

Cancel

Application Questions E-References Notices History

QUICK JUMP...

General Information

Work Experience

Education

General Information

123 First Street

Springfield, CA 11111

(888) 555-5555

(888) 555-5555

Notification Preference

SSN

Highest level of education

Reject

Move to Referred

Move to On-site Interview

Move to Offered

Move to Hire

Send Notices

Schedule interview

Rate

- Click and select a reject reason.
- If preferred, enter comments providing more details.
- Additionally, you can choose to automatically send a notice to the candidate. From the “Automatically send a notice” switch, click to the on setting.
- If a notice template is not linked to your reject reason, select the proper notice template

- If necessary, click Override to make a one-time update to the notice prior to sending.

## Reject Details

Reject Reason \*

Not best qualified

Comments

Gordon did not pass the on-site interview process.

## Notice

Automatically send a notice ☒

Send email to the candidate(s) immediately after rejection

Notice Template \*

Not Best Qualified

Notice Preview

Template

Sample Candidate

Hello <Applicant\_FirstName> <Applicant\_LastName>.

Thank you for interviewing for the position of <Position\_Title>, with our <Position\_Department> Department.

We regret to inform you that you have not been selected for the position

Override

- Once you're done, click Save.
- Repeat these steps for any remaining rejected candidates.

## Steps to Reject Candidates in Bulk

Alternatively, you can reject multiple candidates at the same time. This process will designate the same reject reason and comments for all selected candidates. As a result, you may have a few of rounds of bulk rejecting if candidates have different reject reasons and/or comments.

1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

**My Candidates** Q

Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items ← →

2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and determined multiple will be rejected.
3. Select the all candidates that will have the same reject reason and comments.
4. On the Actions menu, click Reject.

Referred Actions More Q

3 records are selected Clear selection

	Name	Action Date	Notices	Master Profile	Status
<input checked="" type="checkbox"/>	Cole, [REDACTED]	05/07/2017	--	[REDACTED]	Referred Active
<input checked="" type="checkbox"/>	Stern, Phillip	05/07/2017	--	[REDACTED]	Referred Active
<input checked="" type="checkbox"/>	Walker, Michael	05/07/2017	--	[REDACTED]	Referred Active

Items per page 10 Showing 1 - 3 of 3 items

5. Click Q and select a reject reason.
6. If preferred, enter comments providing more details.
7. Additionally, you can choose to automatically send a notice to the candidate. From the "Automatically send a notice" switch, click to the on setting.
8. If a notice template is not linked to your reject reason, select the proper notice template

9. If necessary, click Override to make a one-time update to the notice prior to sending.

## Reject

Phillp Stern (Person ID : 31400914) , Michael Walker (Person ID : 31400916) , + 1 More

Cancel

Save

### Reject Details

Reject Reason \*

Not selected for interview

Comments

Candidate not best qualified. Was not scheduled for on-site interview.

### Notice

Automatically send a notice

☒

Send email to the candidate(s) immediately after rejection

Notice Template \*

Not Selected for Interview

Notice Preview

Override

10. Once you're done, click Save.
11. Repeat these steps for any remaining rounds of rejected candidates.

## Make an Offer

With the OHC role of Hiring Manager or HR Liaison, you can make an offer of employment for the preferred candidate.

### Steps to Make an Offer

1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items

2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and will make an offer for one of them.
3. Click the name the candidate to receive the offer.

	Name	Action Date	Notices	Master Profile	Status	Rating
<input type="checkbox"/>	Blackburn, Gordon	05/08/2017	--		Interview Scheduled for 10/17/2017 1...	Fail 60.00%
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		Interview Scheduled for 10/19/2017 1...	Pass 90.00%
<input type="checkbox"/>	Ortman, Julie	05/08/2017	--		Interview Scheduled for 10/17/2017 2...	Pass 75.00%
<input type="checkbox"/>	Palmer, Mark	05/08/2017	--		Interview Scheduled for 10/19/2017 1...	Pass 85.00%

4. On the Actions menu, click Move to Offered.

Carla Newman

Person ID: 31400911

Interview / Pass

← Prev

Next →

Actions

Print

Cancel

Application Questions E-References

QUICK JUMP...

General Information

Work Experience

Gene

123 Main

Los Angeles, CA 90001

Reject

Move to Referred

Move to Offered

Move to Hire

Send Notices

Schedule interview

Rate

5. Enter the offer date and any additional details including dollar values and comments.

## Make Offer

Carla Newman (Person ID : 31400911)

[Cancel](#)
[Save & Submit](#)

### Offer Details

Offer Date \*

10/24/2017

Offer Amount

\$ 50000.00

Bonus Amount

\$

Comment

6. Once you're done, click Save & Submit.

## Steps to Update Offer Status

If the candidate has accepted or rejected your offer of employment, the status can be updated to track the event.

1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

### My Candidates

Q

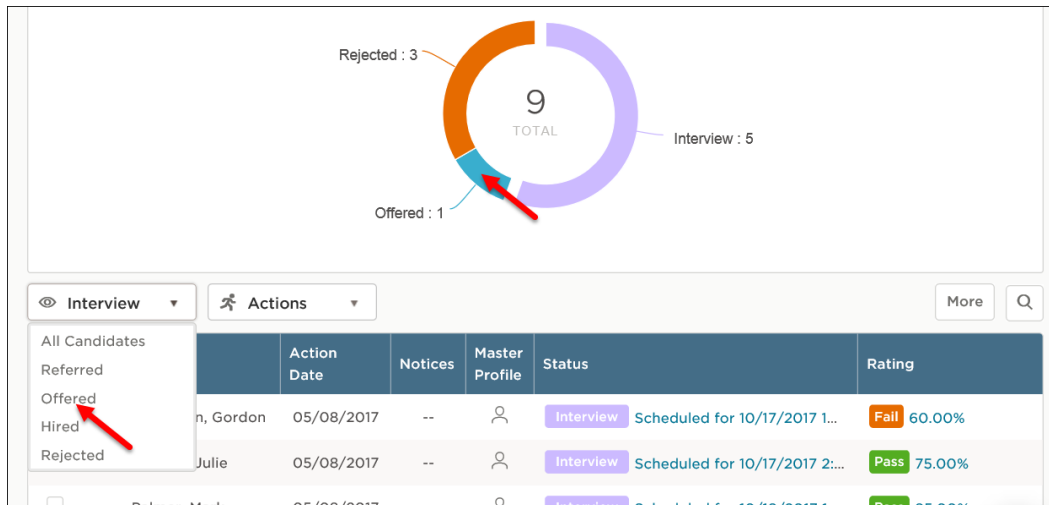
Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items

←

→

- On the doughnut chart or on the Candidates menu, click the offered step.



- From the Status column, click Pending.

Name	Action Date	Notices	Master Profile	Status
Newman, Carla	05/08/2017	--	Person icon	Offered Pending

Items per page 10 Showing 1 - 1 of 1 items

- Click Edit and either Accepted or Rejected.
- Enter the response date and any additional details.

### Make Offer

Carla Newman (Person ID : 31400911)

Cancel Save & Submit

Accepted Rejected Answer Pending

#### Offer Details

Offer Date \*  
10/24/2017

Offer Response Date  
10/25/2017

Offer Amount  
\$ 50000.00

Bonus Amount

- Once you're done, click Save & Submit.



## Hire a Candidate

With the OHC role of Hiring Manager or HR Liaison, you can hire a candidate.

### Steps to Hire a Candidate

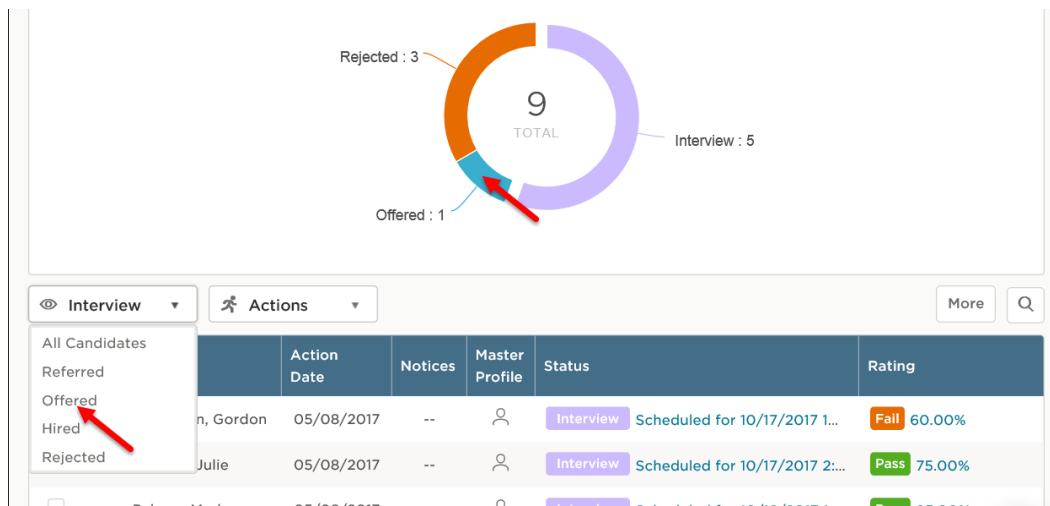
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

**My Candidates** Q

Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items ← →

2. On the doughnut chart or on the Candidates menu, click the offered step.



3. Click the name the candidate to hire.

	Name	Action Date	Notices	Master Profile	Status
<input type="checkbox"/>	Newman, Carla	05/08/2017	--		Offered Accepted

Items per page 10 Showing 1 - 1 of 1 items

- On the Actions menu, click Move to Hire.

**Carla Newman**  
 Person ID: 31400911 Offered

**Actions** | **Print** | **Cancel**

- Reject
- Move to Referred
- Move to Interview
- Move to Hire**
- Send Notifications

**Application** | **Questions** | **E-References** | **Notes**

**QUICK JUMP...** << >>

**General Information**

123 Main Street  
 Los Angeles, CA 90001

- Enter the start date and any additional details.

**Hire Form** | **Save & Close** | **Save & Continue to next Step**

Carla Newman (Person ID : 31400911)

**1. HIRE INFORMATION** | **2. APPROVALS** | **3. ATTACHMENTS**

**Hire Information**

**Offer Date \*** 10/24/2017 | **Date Offer Accepted \*** 10/25/2017

**Offer Amount** \$ 50000.00 | **Bonus Amount** \$

**Start Date \*** 11/01/2017 | **Orientation Date** 11/01/2017

**Filled Date** 10/25/2017


**Active On Eligible List?** ☐ **X**

**Comment**

- Once you're done, click Save & Continue to Next Step.

- If you have an approval workflow template, it will display on the second hire form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes will only be applied to this hire, not the saved approval workflow template.

### Approval Workflow



The approval workflow below has been automatically applied to this requisition based on the Department/Division.  
You have the option to override the workflow for this requisition

1

Budget

Approvers

Richard Gonzales , + 1 more

Status

Pending...

Comments

2

HR

Approvers

Simon Davies , + 1 more

Status

Pending...

Comments

3

County Ad...

Approvers


Maria Lee , + 1 more

Status

Pending...

Comments

Add Approval Group

- You will be prompted to create an approval workflow if a template for your department/division does not exist. You have two options: (1) Create an approval workflow. (2) Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.
- On the Approval Group pulldown, click the applicable approval group.
- From the Approvers field, click , select the applicable approvers, and then click Done.
- Click Add Approval Step.
- Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.

13. Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop operation.

The screenshot shows a vertical sequence of approval steps. Step 1 is 'Budget' with approvers 'Richard Gonzales, + 1 more'. Step 2 is 'County Administrator' with approvers 'Maria Lee, + 1 more'. Step 3 is 'HR' with approvers 'Simon Davies, + 1 more'. A red arrow points to the 'HR' step, indicating it can be dragged to its correct position. Below the steps is a button labeled '+ Add Approval Group'.

14. Once you're done, click Save & Continue to Next Step.

15. Drag any file attachments to the third hire form page and click Save & Submit.

The screenshot shows the 'Add Attachments' section. It has a large dashed orange box with a green circular icon containing an upward arrow. Text inside the box says 'Drag and drop your file here, or browse'. Below this, it lists supported file types: .doc, .docx, .gif, .jpg, .pdf, .png, .ppt, .pptx, .rtf, .txt. A red arrow points to a file icon labeled 'Carla Newman.pdf' with a 'Move' button next to it.

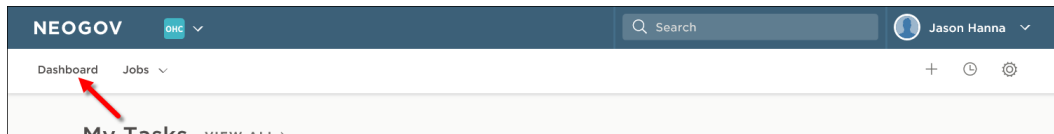
Note: If you're not quite ready to submit the hire, click Save & Close. The hire will display in your referred list with a pending release status. Once you're ready to submit, edit the hire, make any updates and click Save & Submit.

## Approve a Hire

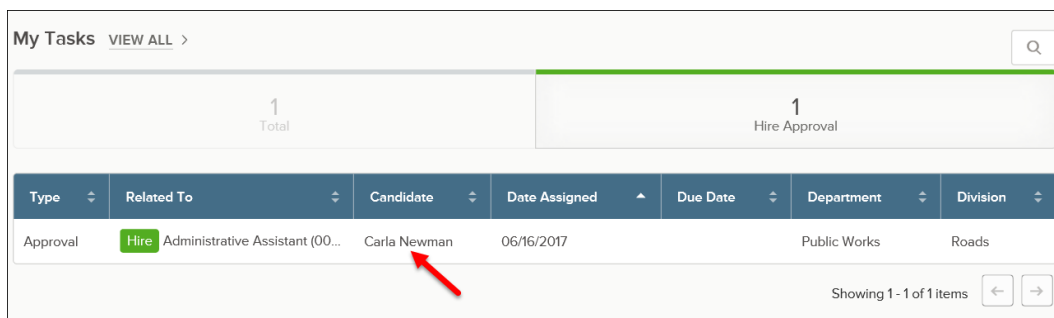
With the OHC role of Approver, you can review a hire sent to you for approval.

### Steps to Approve a Hire

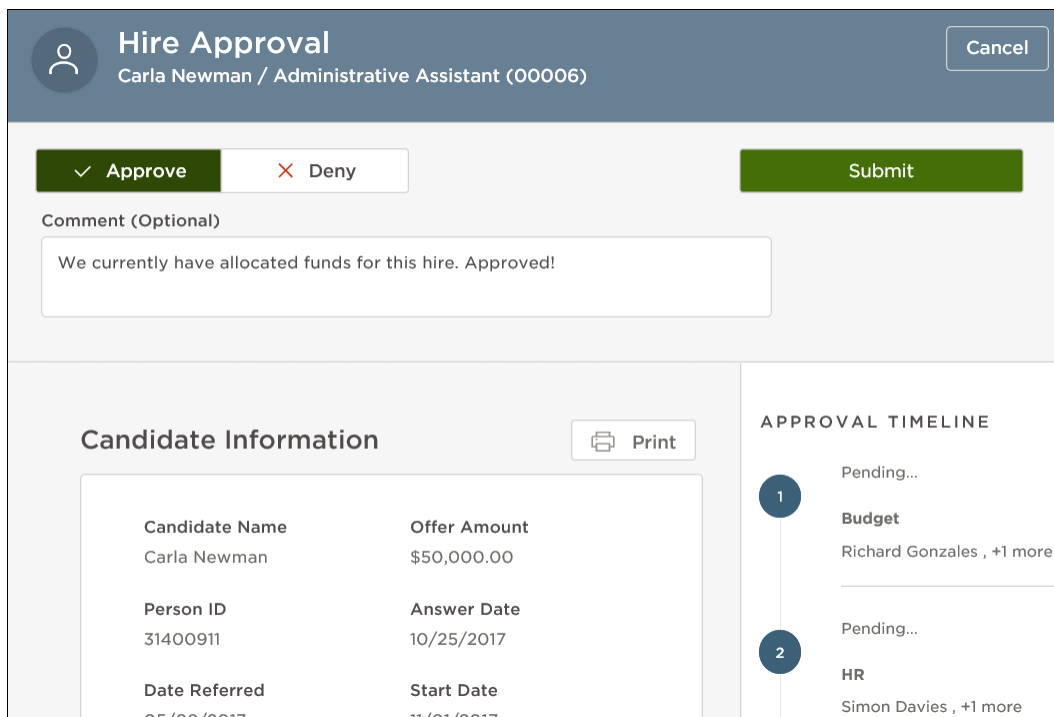
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. From the My Tasks section, click the hire pending your review.




3. Click Approve, type any comments and click Submit.



- If you're testing the approval workflow process, you may be an approver for multiple approval groups. In this case, repeat these steps until the hire has been approved by all groups and sent to HR.

Note: Approvers have the option of denying a hire. If this is done, the hire record can be sent back to any one of the previous approval groups, or all the way back to the hiring manager. Depending on the circumstances of the denial (e.g., additional justification), the hire approval process can be restarted.



## Hire Approval

Carla Newman / Administrative Assistant (00006)

Cancel

✓ Approve

✗ Deny

Submit

Send Back to Step

HiringManager -

^

v

Comment (Optional)

The County Administrator's Office requires a position justification report for this new hire. Thank you in advance for providing this report.

Candidate Information

Print

Candidate Name	Offer Amount
Carla Newman	\$50,000.00

APPROVAL TIMELINE

05/08/2017 by Richard Gonzales

✓

Budget

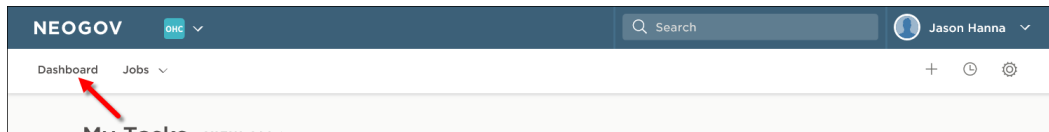
Richard Gonzales - 1 more

## Print Applications

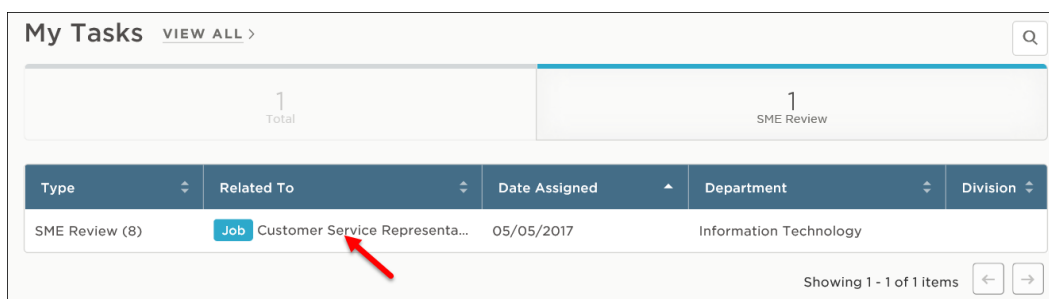
With the OHC role of SME, Rater, Hiring Manager, or HR Liaison, you can print applications.

### Steps to Print Applications

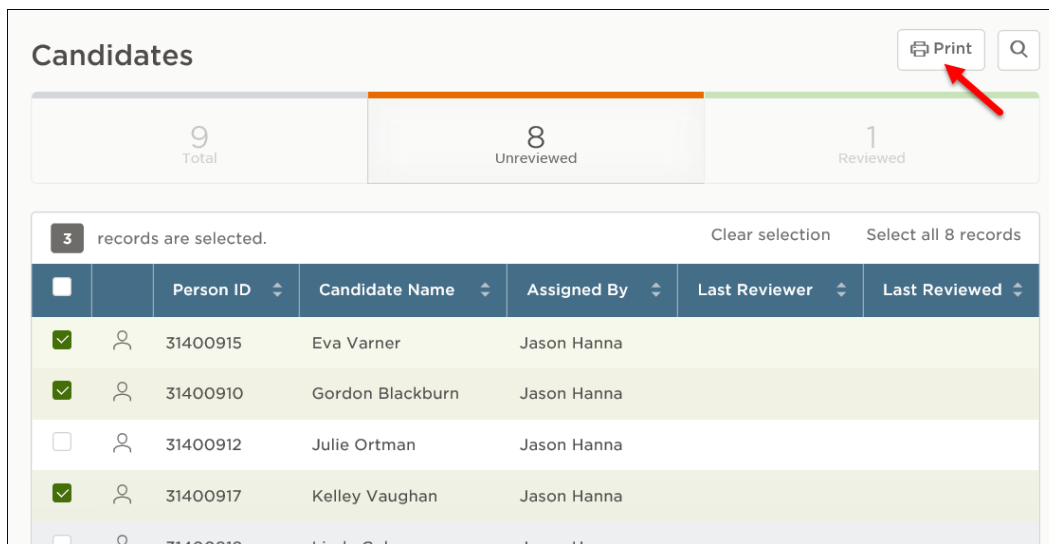
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



2. If you're assigned the OHC role of SME or Rater, go to the listing of candidates.



3. Select the candidates for which you need printed applications and click Print.



- Alternatively, if you're assigned the OHC role of Hiring Manager or HR Liaison, go to the referred list of candidates.

**My Candidates**

Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items

- Select the candidates for which you need printed applications.
- On the Actions menu, click Print Apps.

**Referred** **Actions** **More** **Q**

5 records are selected

Clear selection Select all 9 records

		Action Date	Notices	Master Profile	Status
<input checked="" type="checkbox"/>		05/08/2017	--		Referred Active
<input checked="" type="checkbox"/>		05/08/2017	--		Referred Active
<input checked="" type="checkbox"/>	Newman, Carla	05/08/2017	--		Referred Active
<input checked="" type="checkbox"/>	Ortman, Julie	05/08/2017	--		Referred Active

Reject  
Move to Skype Interview  
Move to On-Site Interview  
Move to Offered  
Move to Hire  
Send Notices  
Print Apps

- The Print Applications window will display. You have three options from which to choose:
  - Print Applications Now: Limited to 25 applications and requires a direct print from your web browser.
  - Create PDF with Applications: Creates a PDF of applications without candidates' uploaded attachments.
  - Create PDF with Applications and Attachments: Creates a PDF of applications with candidate's uploaded attachments (e.g., résumés, cover letters, college transcripts).

Select your preferred printing option and click Continue.

**Referred** **Print Apps** **Cancel** **Continue**

5 records are selected.

	Name	Action Date
<input checked="" type="checkbox"/>	Blackburn, Gordon	05/08/2017
<input checked="" type="checkbox"/>	Cole, Linda	05/08/2017
<input checked="" type="checkbox"/>	Newman, Carla	05/08/2017
<input checked="" type="checkbox"/>	Ortman, Julie	05/08/2017
<input checked="" type="checkbox"/>	Palmer, Mark	05/08/2017
<input type="checkbox"/>	Stern, Phillip	05/08/2017
<input type="checkbox"/>	Varnier, Eva	05/08/2017
<input type="checkbox"/>	Vaughan, Kelley	05/08/2017

**Print Applications**

You've selected 5 applications to print.

**Print Options**

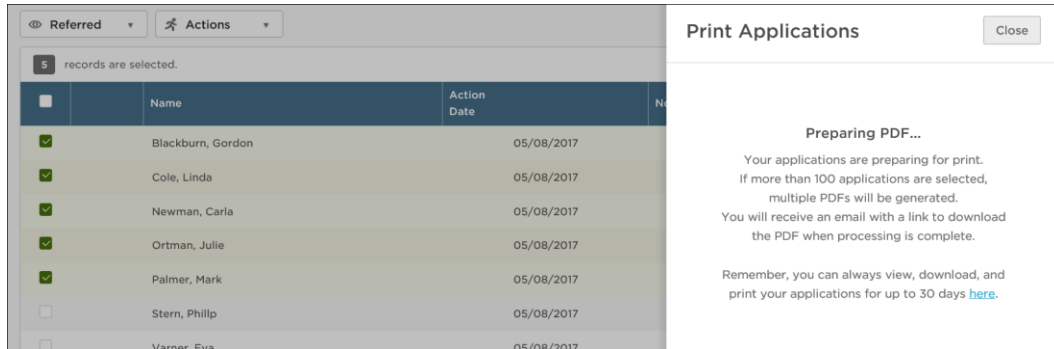
☐ Print Applications Now  
Limited to a maximum of 25 applications. Preview and print applications directly from your browser.

☐ Create PDF with Applications  
A PDF will be generated and you will be notified via email when it is ready to download.

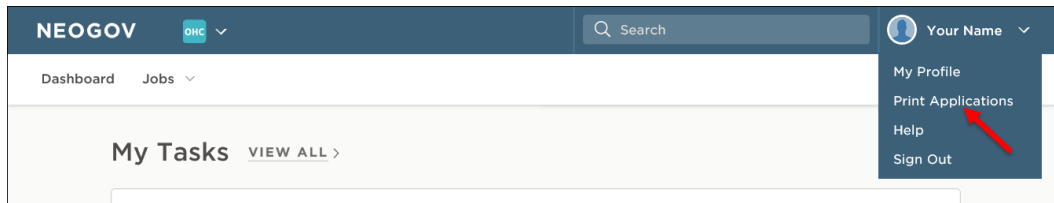
☒ Create PDF with Applications and Attachments  
A PDF will be generated and you will be notified via email when it is ready to download.



- If you selected either PDF download option, a confirmation window will display. You'll receive an email from support@neogov.com once your PDF is ready for download.



- Go to your saved PDF. On the Profile menu, click Print Applications.



- From the PDF column, click View for the saved PDF you want to download and/or print.

