



Department User

Guide

INSIGHT OHC SCREEN

The screenshot shows the Insight OHC interface. At the top, there is a navigation bar with links: [My Requisitions](#), [My SME Review](#), [My List](#), [Preferences](#), [Help](#), and [Logout](#). Below this is a secondary bar with [Post](#) and [Approvals](#). The main content area includes a search bar with the text "Search for req. # or req. title" and a "Go" button. Below the search bar, there are three records found, displayed in a table format. The table has columns for Req #, Req. Title, Department, Division, Submitted, Status, and Action. The records are:

Req #	Req. Title	Department	Division	Submitted	Status	Action
00049	Account Clerk II	My Hampton Dept		01/11/06	Approved	Edit Cancel
00052	Buyer	My Hampton Dept		01/15/06	Draft	Edit Cancel
00051	Custodian (ctrl)	My Hampton Dept		01/15/06	Open	Edit Cancel

Callout boxes a-j point to the following elements:

- a**: My Requisitions link
- b**: Search bar
- c**: Approvals link
- d**: Post link
- e**: Show All Reqs. in My Dept. link
- f**: Show Approval Step link
- g**: View Department Users link
- h**: My List link
- i**: Preferences link
- j**: Logout link

Your ability to view system components depends upon your user permissions. That is, if you have less than full rights, you will not see all components.

- a** **Screen identifier** Orients you to the screen/function you are currently in.
- b** **Job requisitions** - Create by selecting “Open New Requisition.” Wherever you are in the program, “My Requisitions” will bring you back to this main page.
View all City job descriptions Go to “Open New Requisition” to see a list of all positions.
- c** **Approve job requisitions and hiring decisions** (Approver access only).
- d** **Job postings** Click here to view the status of and details regarding job postings.
- e** **View all department requisitions**
- f** **View details of requisition approvals**
- g** **Add and edit department user permissions**
- h** **Eligible candidates** Review and print applications, schedule interviews, record job offers and hiring decisions via ‘My List’ (Hiring Manager access).
- i** **Preferences** Edit your user profile, including password and frequency of email notices.
- j** **Online Help**

NeoGov Recruitment Process

(Department Roles are Highlighted)

Step in Recruitment Cycle	Access / Role
1. Create Requisition	Department Originator (Page 4)
2. Establish Requisition Approval	Department Director (Page 8)
3. Requisition Approved	Approver (Other Dept User(s) and/or Other Approvers such as Department Director, City Manager and Budget (Page 10)
4. Requisition Opened/Assigned	HR
5. Exam (Recruitment) Plan Creation	HR
6. Advertising the Position	HR
7. Create Evaluation Steps	HR
8. Applicants Search for Jobs and Apply	Applicant
9. Applicants Referred from Human Resources to Hiring Manager	HR
10. View Applications/Print copy of Application	Dept Hiring Official (Page 11)
11. Schedule Candidates for Interview	Dept Hiring Official (Page 14)
12. Make an offer/Reject Candidates	Dept Hiring Official (Page 16)
13. Final Departmental Approval of Hiring Decisions	Approver (Other Dept User(s) and/or Others such as the Department Director) (Page 21)
14. Recruitment Records Archived	HR

Create a Requisition

1. Go to the LEO website: www.lynchburgva.gov and login to the 'Department User – NeoGov -Online Hiring Center.'
2. Click on the 'Login' link in the upper-right-hand corner
3. Enter your Username and Password
4. Select the 'Online Hiring Center – Departments' radio button, click **login**

5. Click on 'Open New Requisition'

NEOGOV Insight OHC

My Requisitions | My SME Review | My List | Preferences | Help | Logout

Post Approvals

Welcome, Mary Dept Head

Open New Requisition | Show All Reqs. in My Dept. | Show Approval Step | View Department Users | Cancelled Reqs

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Search for req. # or req. title:

3 records found.
Page 1 of 1

Open Requisitions

Req #	Req. Title	Department	Division	Submitted	Status	Action
00049	Account Clerk II	My Hampton Dept		01/11/06	Approved	Edit Cancel
00052	Buyer	My Hampton Dept		01/15/06	Draft	Edit Cancel
00051	Custodian (crl)	My Hampton Dept		01/15/06	Open	Edit Cancel

Page 1 of 1

- You will go to the **“Class Title”** page that shows a list of class specification already installed in the system.

Before creating the new requisition, you may want to review the job description, salary, and benefits for the position. If you have questions or updates, confer as needed within your department and/or contact your HR representative.

- To look at the job details, click on the position title.

26 records found.
Page 1 of 2

<< Previous Page | 1 | 2 Next Page >>

Class Code	Class Title	Requisition
625	40 Hour Fire Lieutenant	Create New
006	911 Information Center Team Leader	Create New
141	Account Clerk II	Create New
512	Assistant City Manager	Create New
310	Buyer	Create New
500	Case Manager	Create New

From here, you may print and/or proceed with creating the requisition.

Class Title: **Buyer**

Salary: \$13.69 - \$22.48 hourly
 \$1,094.81 - \$1,798.15 biweekly
 \$2,372.08 - \$3,896.00 monthly
 \$28,465.00 - \$46,752.00 annually

[Return to List](#) [Create Requisition](#)

[Print Job Description](#)

Description	Benefits
Purchases goods and services for general city operations and the public school system, adhering to all applicable regulations; provide technical assistance to user agencies.	
Examples of Work: <ul style="list-style-type: none"> Reviews departmental procurement requests and on-line transactions for accuracy and completeness; contacts originating departments as necessary for correction, clarification, funding codes, intended use, date needed or other pertinent data. Prepares invitations to bid and requests for proposals based on regulations pertaining to funding sources involved, applicable laws, current market place conditions and lead time for material specified. Analyzes each bid or proposal to ensure all specifications are met. Selects bids with end 	

- Click **“Create Requisition”**. You will go the **“View/Edit Requisition”** form.

As you fill in the requisition form, note that required fields are marked with a **red asterisk ***.

NEOGOV
Insight OHC

My Requisitions | My SME Review | My List | Preferences | Help | Logout

Post

Welcome, Sherrye Owen View/Edit Requisition

Class Title: **GASB 34 Accounting Specialist**
Class Code: **3**

* Required

Desired Start Date

* Requisition # [assigned when requisition is saved]

Working Title

Vacancies

* Department ▼

Division ▼

* Hiring Manager ▼

Job Term ▼

List Type: ▼

Position Type Existing Position (Replacement of Staff)
 New Position

Position Control	Position #	First Name	Last Name	Vacancy Date

Skills:

Comments:

“**Desired Start Date**” is the date the successful candidate begins work.

The “**Requisition #**” will be automatically assigned.

For ‘**Working Title**’ If you leave this blank, the requisition will automatically be labeled with the Class Title. You may find it useful in certain situations to use the working title actually used within the Department rather than the Class Title. (ex. Human Resources ASA II)

Under ‘**Vacancies**,’ indicate the number of positions you need to fill.

Normally, the ‘**Hiring Manager**’ will be the person in your department who will receive the list of eligible candidates from HR.

‘**List Type**’ lets HR know how to advertise this job. Jobs are posted in 3 categories: open to the public, open to City employees only, and open to department employees only. **If the position is not open to the public, please note this clearly in comments section so HR is clear about how to post the job.**

Be aware that NeoGov software provides 5 options under 'List Type:'

List Type:	=== Select ===	
Position Type	=== Select ===	(Replacement of Staff)
Position Control	Regular	
	Promotional Only	
	Departmental Promotional Only	First Name
	Regular and Promotional	Vacancy Date
	Transfer	Add Another Vacancy

Use the following guidelines to complete this field:

- **'Regular'** designates jobs available to the public (including current City employees)
- **"Promotional Only"** For jobs available to City employees only. This may be a promotion, voluntary demotion or transfer for a current City employee. Please explain further in the 'Comments' section.
- **'Department Promotional Only'** designates situations where a job opening is a promotional opportunity *and* is only available to current departmental employees. This will rarely occur and requires prior approval of Human Resources.

Under **'Position Type,'** select whether this requisition will be filling an **'Existing Position'** or if this is a **'New Position.'**

In the case of an **"Existing Position,"** you must record who is leaving the job. To do so, click the button **'Add Another Vacancy'** and complete the **'Position Control'** fields. Complete the **'Position #'** field with the position number.

If you have more than one position to replace, click **'Add Another Vacancy'** again to open another set of position control fields.

Position Type	<input checked="" type="radio"/> Existing Position (Replacement of Staff) <input type="radio"/> New Position			
Position Control	Position #	First Name	Last Name	Vacancy Date
	003	Jane	Leavingjob	03/01/06
	Add Another Vacancy			

The "skills" box can be used to inform HR about specific skills or abilities the position requires that can be included in the position advertisement.

- **"Budget Code"** is the 12-digit GL Distribution code for this position.
- **"Vacancy Reason"** Reason the position is available.
- **"Justification for Filling at This Time"** identifies the need for filling the vacant position.
- **"Estimated Savings"** Pay period salary times estimated pay periods less other associated costs.
- **"Advertising Budget Code"** – GL code that advertising costs will be charged to (21 digits)
- **"Advertising Dates and Sources"** – Resources such as Newspapers, Web sites, Professional Organizations, etc. that will be utilized to advertise the vacant position.

If your department requires no additional approvals beyond the person who is creating this requisition, check the **'No Approvals'** box at the bottom of the screen. Then click **'Save and Release,'** to send the requisition directly to HR. If you click **'Save'** the requisition will remain as a draft; it will not be sent forward until you go back and click **'Save and Release.'**

Click **'Save and Release.'** A screen will appear that will confirm the Requisition information.

Congratulations! You have completed a Requisition Form. You can click **“Logout”** to return to the NeoGov Login screen.

Establishing Requisition Approval

Alternately, if requisition approvals are needed, you will first select the approval group:

The screenshot shows a form with the following elements:

- No Approvals**:
- Approval 1:** A dropdown menu with the text "=== Select ===". A list of options is displayed below it: "=== Select ===", "Budget", "Dept Directors/AAs" (highlighted in blue), and "City Manager Salary Approvals".
- Approval 2:** A dropdown menu with the text "=== Select ===".
- Two radio buttons: "Must approve before next approval" and "Final approval".

An arrow points to the "No Approvals" checkbox.

Next, select specific individuals as approvers. The following examples illustrate a variety of situations where the person who created the requisition does not have the authority to send it directly to HR. That is, additional approval is required:

- In this case, **only Mary Dept Head’s approval is needed** before the requisition is transmitted to HR.

The screenshot shows the form with the following elements:

- No Approvals**:
- Approval 1:** A dropdown menu with the text "Dept Directors/AAs".
- Two radio buttons: "Must approve before next approval" and "Final approval" (selected with a green dot).
- A list of names: ">Dept Head, Mary" (highlighted in blue) and ">Adminasst, Joe".

An arrow points to the ">Dept Head, Mary" name.

- In this case, **either Mary Dept Head or Joe Administrative Designee needs to give final approval**. Note that both their names are highlighted. Whoever approves the requisition first will be the final approver.

The screenshot shows the form with the following elements:

- No Approvals**:
- Approval 1:** A dropdown menu with the text "Dept Directors/AAs".
- Two radio buttons: "Must approve before next approval" and "Final approval" (selected with a green dot).
- A list of names: ">Dept Head, Mary" (highlighted in blue) and ">Adminasst, Joe" (highlighted in blue).

Two arrows point to the names in the list.

- In this case, **both Joe and Mary must approve the requisition**. It will be routed to Joe first, then Mary, who will be the final approver.

No Approvals

Approval 1: Dept Directors/AAs
 Must approve before next approval
 Final approval

Approval 2: Dept Directors/AAs
 Must approve before next approval
 Final approval

>Dept Head, Mary
 >Adminasst, Joe

>Dept Head, Mary
 >Adminasst, Joe

For each approval step, you must select the applicable radio button ('**Must approve before next approval**' or '**Final approval**').

Once approvals are set up click on '**Save and Release.**' Again, clicking '**Save Only**' will retain the requisition as a draft; it will not be forwarded to anyone until you return and **select 'Save and Release.'**

From '**My Requisitions**' on the (Insight OHC Screen) you will see the requisition that you just saved and released is listed as '**Pending Approval.**' Note that already approved requisitions are marked 'Approved.'

Open Requisitions						
Req #	Req. Title	Department	Division	Submitted	Status	Action
00104	Buyer	My Hampton Dept		01/22/06	Pending Approval	Edit Cancel
00101	Custodian	My Hampton Dept		01/22/06	Approved	Edit Cancel

A requisition may also be '**Denied,**' placed '**On Hold/Pending**' or '**Cancelled**' by the approver. If '**Denied,**' the requisition creator will see the status listed as '**In Progress.**'

Open Requisitions						
Req #	Req. Title	Department	Division	Submitted	Status	Action
00104	Buyer	My Hampton Dept		01/22/06	In Progress	Edit Cancel
00101	Custodian	My Hampton Dept		01/22/06	Approved	Edit Cancel

To see details, click on '**Show Approval Step**' (Insight OHC Screen).

My R

[Open New Requisition](#) |
 [Show Only My Reqs.](#) |
 [Show Approval Step](#) |
 [View Department Users](#) |
 [Cancelled Reqs](#)

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#)

Additional details will then display as shown below.

Open Requisitions						
Req #	Req. Title	Department	Division	Submitted	Status	Action
00104	Buyer	My Hampton Dept		01/22/06	In Progress	Edit Cancel
Dept Directors/AAs		Received: 01/22/06 02:46 PM				
· Dept Head, Mary				Denied: 01/22/06 02:55 PM		
Note: The budget needs to be confirmed before we can post this position.						

Click **“Logout”** to return to the NeoGov Login screen.

Requisition Approved

1. If you have been designated as an approver for your department, you will receive an email notifying you that there is a requisition needing approval before it is forwarded to HR or the next person in the approval chain. From the **‘Insight OHC’** screen, select **‘Approvals:’**



2. Select **‘Requisitions’** from the drop down



3. You may review details of the requisition by clicking on the job title. Select the **Approve/Deny** link to the right of the requisition you are working on. Actions you may take are **‘Approve,’ ‘Deny,’ ‘On Hold/Pending’** and **‘Cancel.’**
 - a. If you **‘Approve’** the requisition, it will go to the next approver or human resources, depending on how the original approval chain was set up.
 - b. If placed **‘On Hold/Pending,’** the requisition creator will see the status change to ‘On Hold.’ He/she may go in and edit the requisition, after which you can approve as appropriate.
 - c. If **Cancelled**, the requisition status will change accordingly. The requisition is moved to ‘Closed Requisitions.’
 - d. If **Denied**, the requisition will be returned as indicated in the **‘Return To’** field below. The requisition will no longer display on your **‘My Requisition Approvals’** screen, but you may click on **‘My Requisitions’** >> **‘Show All Reqs in My Dept’** >> **‘Show Approval Details’** to see denial activity. Once denied, the requisition creator may edit the

requisition and return it to the approver, who will have another opportunity to Approve/Deny.

* Approve/Deny	Deny
* Return To	HR Liaison - Originator, Jane
Note	Jane, just got word that we're under a hiring freeze. We will not be able to fill this position right now. Mary

Click **“Logout”** to return to the NeoGov Login screen.

View Referred Candidates/Print Copy of Application

1. When HR forward the Referred Candidates, the Hiring Manager will receive email notification. Go to the LEO website: www.Lynchburgva.gov and login to the **‘Department User – NeoGov -Online Hiring Center.’**
2. From the Insight OHC Screen click on the **‘My List’** link in the upper-right-hand corner (this will display all referred lists of eligible candidates for this Hiring Manager)



The **‘Referred Candidates’** screen is displayed including the following five sections:

- **Referred** – Referred applicants
- **Interview Scheduled** – Applicants with scheduled interviews
- **Offer Pending** – Applicants who have received offers
- **Hired** – Applicants marked as hired
- **Rejected** – Applicants marked as rejected

8830-02 Clerk I-TEST

Referred

1 record found.

Name	SSN	Interview	Offer	Action
Thomas, Mary	299-38-4652	N/A	N/A	== Select == <input type="button" value="Go!"/>

Page 1 of 1

Interview Scheduled

1 record found.

Name	SSN	Interview	Offer	Action
Komers, Ward	222-55-2222	07/17/03 2:00 PM	N/A	== Select == <input type="button" value="Go!"/>

Page 1 of 1

Offer Pending

No records found.

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

Hired

No records found.

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

Rejected

No records found.

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

3. Click on the applicant's name to view their application

8830-02 Clerk I-TEST

Referred

1 record found.

Name	SSN	Interview	Offer	Action
Thomas, Mary	299-38-4652	N/A	N/A	== Select == <input type="button" value="Go!"/>

Page 1 of 1

Interview Scheduled

1 record found.

Name	SSN	Interview	Offer	Action
Komers, Ward	222-55-2222	07/17/03 2:00 PM	N/A	== Select == <input type="button" value="Go!"/>

Page 1 of 1

Offer Pending

No records found.

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

Hired

No records found.

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

Rejected

No records found.

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

The 'Download Applications' screen is displayed and a .PDF (Adobe Acrobat) file is generated

Insight OHC

My Resolutions | My Approvals | My SDE Review | My List | Endorsements | Logout

Welcome, Michelle Clark

Download Application

Select All | Clear All

Default to My SDE Review

Download All Applications | Download Selected Applications

Previous | Next >

METROPOLIS EMPLOYMENT APPLICATION

METROPOLIS
123 Burghal Way
Tomb, International 99999
1111111-1111

Received: 1/24/06 4:53 PM
For Official Use Only:
DOB: _____
GPO: _____
Experience: _____
Training: _____
Other: _____

Letourneau, Scott J
00021 HR MANAGER

PERSONAL INFORMATION

NAME (Last, First, Middle): Letourneau, Scott J

ADDRESS: (Street, City, State, Zip Code)
222 N. Sanderson Blvd., Suite 2000, Escondido, California 92040

HOME PHONE: _____ ALTERNATE PHONE: _____ EMAIL ADDRESS: s-let@ms.com

DRIVER'S LICENSE: (State, Class) DRIVER'S LICENSE NUMBER: (State, Class, Number, Exp) LEGAL RIGHT TO WORK IN THE UNITED STATES? (State, Class)

Click on the **'View on-line'** link.

The application is displayed including:

- Applicant demographic information
- Non-Confidential agency-wide supplemental questions
- All job-specific supplemental questions

or Click on **'Print'** under **'Applications'** to download, and/or print applications.

2 records found.
Page 1 of 1

Req #	Title	Department	Division	Hiring Mgr	Candidates	Applications	Last Referred
00048	Staff Assistant I	My Hampton Dept		Dept Head, M.	View	Print	01/11/06
00051	Custodian	My Hampton Dept		Hiring Manager, P.	View	Print	01/15/06

After printing the application, click on the **"Return to Referred Candidates"** list link.

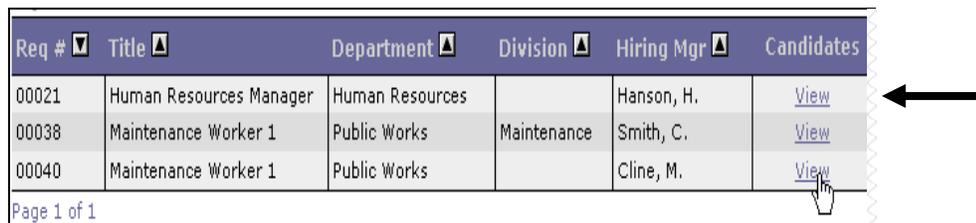
Schedule Candidates for Interview (Optional)

The interview scheduling function enables you to keep hiring information organized in one system and will allow you to send email or letters to interviewees using customized templates. However, you are not required to use the interview scheduling function of LEO; it is a tool for your convenience.

1. Login to the Insight OHC
2. Click on **'My List'**
3. Select **'View'** next to the job title you are working on

Req # ▾	Title ▲	Department ▲	Division ▲	Hiring Mgr ▲	Candidates
00021	Human Resources Manager	Human Resources		Hanson, H.	View
00038	Maintenance Worker 1	Public Works	Maintenance	Smith, C.	View
00040	Maintenance Worker 1	Public Works		Cline, M.	View

Page 1 of 1



4. Choose **'Schedule Interview'** from the **'Action'** dropdown
- 

8830-02 Clerk I-TEST

Referred

1 record found.

Name	SSN	Interview	Offer	Action
Thomas, Mary	299-38-4652	N/A	N/A	Schedule Interview <input type="button" value="Go"/>

Page 1 of 1

Interview Scheduled

1 record found.

Name	SSN	Interview	Offer	Action
Komers, Ward	222-55-2222	07/17/03 2:00 PM	N/A	== Select == <input type="button" value="Go"/>

Page 1 of 1

Offer Pending

No records found.

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

Hired

No records found.

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

Rejected

No records found.

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

5. Click the **'Go'** icon .

6. The **'Schedule Interview'** screen is displayed

* Required

* Date:	July	17	2003
* Time:	2 pm	:00	
* Duration:	1 hr	:00	
* Location:	Office		
* Address:	222 N. Sepulveda Blvd.		
* City:	El Segundo		
* State:	California		
* Zip Code:	90245		
Phone:			
Comments			

Complete the interview information:

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

7. Click the **'Save'** button

The applicant record is advanced to the **'Interview Scheduled'** section

9830-02 Clerk I-TEST

Referred

No records found.

Name	SSN	Interview	Offer	Action
Interview Scheduled				
2 records found.				
Name	SSN	Interview	Offer	Action
Yomary, Ward	222-55-2222	07/17/03 2:00 PM	N/A	== Select == <input type="button" value="Go"/>
Thomas, Mary	299-38-4652	07/17/03 1:00 PM	N/A	== Select == <input type="button" value="Go"/>

Page 1 of 1

Offer Pending

No records found.

Name	SSN	Interview	Offer	Action
Hired				
No records found.				
Name	SSN	Interview	Offer	Action
Rejected				
No records found.				
Name	SSN	Interview	Offer	Action

Making an Offer/Rejecting Candidates (Optional)

1. Log into the Insight OHC (Must be a Hiring Manager)

NEOGOV **Insight OHC** My Requisitions | My SME Review | My List | Preferences | Help | Logout

Post Approvals

Welcome, **Mary Dept Head** Requisitions

[Open New Requisition](#) | [Show All Reqs. in My Dept.](#) | [Show Approval Step](#) | [View Department Users](#) | [Cancelled Reqs](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Search for req. # or req. title:

3 records found.
Page 1 of 1

Open Requisitions

Req #	Req. Title	Department	Division	Submitted	Status	Action
00049	Account Clerk II	My Hampton Dept		01/11/06	Approved	Edit Cancel
00052	Buyer	My Hampton Dept		01/15/06	Draft	Edit Cancel
00051	Custodian (cr)	My Hampton Dept		01/15/06	Open	Edit Cancel

Page 1 of 1

2. Click on “Open Requisitions”.

S I B I C I Q I E I F I G I H I I I Z I X I L I M I N I O I P I Q I B I S I T I V I W I X I Y I Z

Search for list title:

10 records found.
Page 1 of 1

Job #	List Code	Title	Candidates	Date	Action
REQ TEST ACC	REQ TEST ACC	Accountant I	View Candidates	10/15/02	More Names
222 REQ 222	222 REQ 222	Accountant I - 222 Req 222	View Candidates	10/15/02	More Names
7000-01		Admin Assistant III	View Candidates	10/06/02	More Names
4900-01		Airport Manager	View Candidates	10/01/02	More Names
0080-01		Assistant Controller	View Candidates	10/02/02	More Names
EX567	EX567	Clerk I	View Candidates	09/05/02	More Names
8830-02		Clerk I-test	View Candidates	10/14/02	More Names
9934-04		Clerk Typist II	View Candidates	10/15/02	More Names
9009-01		Registered Nurse	View Candidates	10/13/02	More Names
676767	676767	Senior Fire Inspector	View Candidates	10/13/02	More Names

3. Click on the ‘View Candidates’ link for the appropriate recruitment.

The ‘Referred Candidates’ screen is displayed

Referred								
No records found.								
Name	Phone	Application	Exam Plan	Referred Date	Interview	Offer	Action	
Interview Scheduled								
3 records found.								
Name	Phone	Application	Exam Plan	Referred Date	Interview	Offer	Action	
Ball, Lucille	P: (757) 222-4444	View	00048	01/11/06	1/12/06 9:00 AM	N/A	== Select ==	Go
Potter, Harry	P: (757) 222-2222	View	00048	01/11/06	1/12/06 10:00 AM	N/A	== Select ==	Go
Bond, James	P: (434) 444-0400	View	00048	01/11/06	1/12/06 11:00 AM	N/A	== Select ==	Go
Page 1 of 1							== Select ==	
Offer Pending								
No records found.								
Name	Phone	Application	Exam Plan	Referred Date	Interview	Offer	Action	
Hired								
No records found.								
Name	Phone	Application	Exam Plan	Referred Date	Interview	Offer	Action	
Rejected								
No records found.								
Name	Phone	Application	Exam Plan	Referred Date	Interview	Offer	Action	

4. Choose 'Make Offer' from the 'Action' dropdown

Click the 'Go' icon

The 'Make Offer' screen is displayed

Input the offer information:

- **Offer Date** – Date of offer
- **Offer Amount** – Hourly amount offered
- **Bonus Amount** – (Do not complete)
- **Comments** – Offer comments
-

* Required

* Status: Offer Pending

* Offer Date:

Offer Amount:

Bonus Amount:

Comments

Click the 'Save' button

The applicant record is advanced to the 'Offer Pending' section.

- The 'Offer' column displays 'Pending'

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No records found. **Referred**

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

1 record found. **Interview Scheduled**

Name	SSN	Interview	Offer	Action
Thomas, Mary	299-38-4652	02/12/03 1:00 PM	N/A	== Select == <input type="button" value="Go"/>

Page 1 of 1

1 record found. **Offer Pending**

Name	SSN	Interview	Offer	Action
Romero, Ward	222-55-2222	N/A	Pending	== Select == <input type="button" value="Go"/>

Page 1 of 1

No records found. **Hired**

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

No records found. **Rejected**

Name	SSN	Interview	Offer	Action
------	-----	-----------	-------	--------

5. To mark the offer as accepted/declined:

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

* Required

* Status: Accepted Declined

* Offer Date: 02/08/03

Offer Amount: \$45,000.00

Bonus Amount: \$0.00

* Accepted Date: 04/10/03

Comments

- Select the appropriate 'Status' radio button
- Update the 'Accepted Date' if necessary
- Click the 'Save' button

The 'Referred Candidates' screen is displayed. The applicant 'Offer' information is updated

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Referred

No records found.

Name	SSN	Interview	Offer	Action
Interview Scheduled				
1 record found.				
Name	SSN	Interview	Offer	Action
Thomas, Mary	299-38-4652	07/17/03 1:00 PM	N/A	== Select == <input type="button" value="Go"/>
Page 1 of 1				
Offer Pending				
1 record found.				
Name	SSN	Interview	Offer	Action
Komers, Ward	222-55-2222	N/A	* Accepted	== Select == <input type="button" value="Go"/>
Page 1 of 1				
Hired				
No records found.				
Name	SSN	Interview	Offer	Action
Rejected				
No records found.				
Name	SSN	Interview	Offer	Action

To complete the hiring process, you **MUST** mark all applicants as either Hired or Rejected.

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

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Referred

No records found.

Name	SSN	Interview	Offer	Action
Interview Scheduled				
1 record found.				
Name	SSN	Interview	Offer	Action
Thomas, Mary	299-38-4652	07/17/03 1:00 PM	N/A	Reject <input type="button" value="Go"/>
Page 1 of 1				
Offer Pending				
No records found.				
Name	SSN	Interview	Offer	Action
Hired				
1 record found.				
Name	SSN	Interview	Offer	Action
Komers, Ward	222-55-2222	N/A	N/A	== Select == <input type="button" value="Go"/>
Page 1 of 1				
Rejected				
No records found.				
Name	SSN	Interview	Offer	Action

Click the 'Go' icon

The 'Reject' screen is displayed

- Complete the 'Reject Candidate' information
- **Reason** – Rejection reason (disposition)
 - **Comments** – Rejection comments

* Required

Name:	Sherrye Owen
SSN:	
* Reason:	== Select ==
Comments:	<div style="border: 1px solid black; padding: 2px;"> <p>== Select ==</p> <p>Does not meet minimum qualifications</p> <p>Not Best Qualified</p> <p>No Show at Interview</p> </div>

Click the 'Save' button

The applicant record is moved to the 'Rejected' section

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Referred				
No records found.				
Name	SSN	Interview	Offer	Action
Interview Scheduled				
No records found.				
Name	SSN	Interview	Offer	Action
Offer Pending				
No records found.				
Name	SSN	Interview	Offer	Action
Hired				
1 record found.				
Name	SSN	Interview	Offer	Action
Komers, Ward	222-55-2222	N/A	N/A	== Select == <input type="button" value="Go"/>
Page 1 of 1				
Rejected				
1 record found.				
Name	SSN	Interview	Offer	Action
Thomas, Mary	299-38-4652	N/A	N/A	== Select == <input type="button" value="Go"/>

Repeat the "Reject" option for each employee and click on icon.

Final Departmental Approval of Hiring Decision

1. Log into the Insight OHC
2. Click on the **“Show Approval Step”** link

Welcome, Mary Dept Head Requisitions

[Open New Requisition](#) |
 [Show All Reqs. in My Dept.](#) |
 [Show Approval Step](#) |
 [View Department Users](#) |
 [Cancelled Reqs](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Search for req. # or req. title:

3 records found.
Page 1 of 1

Open Requisitions

Req #	Req. Title	Department	Division	Submitted	Status	Action
00049	Account Clerk II	My Hampton Dept		01/11/06	Approved	Edit Cancel
00052	Buyer	My Hampton Dept		01/15/06	Draft	Edit Cancel
00051	Custodian (crl)	My Hampton Dept		01/15/06	Open	Edit Cancel

Page 1 of 1

The 'My Hire Approvals' screen is displayed, depicting hiring actions submitted to you for approval:

Click on the **'Hire'** link on the 'Approvals' menu

[Show All Approval Steps](#)

Req #	Title	Department	Division	Hire Name	Start Date	Hire Steps	Action
00038	Maintenance Worker 1 - MC	Public Works	Maintenance	Marley, Jill	08/01/05	Details Show	Approve/Deny History

Click on **'Details'** to view the hiring action details.

Click on the **'Approve/Deny'** link associated with the hiring action. The 'Hire Action' screen is displayed.

Select the appropriate 'Approve/Deny' action from the dropdown

- Approve – Approve the hire action and automatically route to the next approval level (if applicable)
- Deny – Deny the hire action and automatically route requisition back to the department hiring officials who submitted the requisition.

Click on the 'Save' button. An automatic email is generated once an action is taken

Once 'Approvers' have acted on your hiring decision, a 'Hiring Manager' can go back to the Referred Candidates screen and see approval details by clicking on 'Edit' next to the name of the hired candidate:

Hired

1 record found.

Name	Phone	Application	Exam Plan	Referred Date	Interview	Offer	Action
Potter, Harry	P: (757) 222-2222	View	00099	01/22/06	N/A	N/A	== Select == Go

Page 1 of 1

At the bottom of the screen, you will see approval information regarding the hiring decision.

- Click on the [View History](#) link for more detail
- Note the section 'Final Authorization.' This tracks HR's final action regarding the hiring event.

'Final Authorization' will change as follows once HR has approved the hiring decision:

Approval 1 Dept Directors/AAs	Dept Head, Mary
Received 01/22/06 11:19 AM	
APPROVED BY MARY DEPT HEAD	
ON 01/22/06 11:21 AM	
Final Authorization 01/22/06 12:00 PM by Your Dept's HR Analyst	

Glossary

Agency-wide Questions: Questions added to the application form for individual agencies. These are questions asked of all applicants and are not part of the standard application form provided by NEOGOV. These questions often include questions related to the following areas: Gender, Ethnicity, Age Group, Conviction record, Nepotism, etc. Agency-wide questions can be created and edited only by those HR Users designated as System Administrators.

Agency Preferences: An Administration table within Insight which contains a variety of specific preferences for your agency, including the text to be displayed on the job opportunities and class spec web pages, the text displayed to applicants during the application process for agency-wide questions, job-specific supplemental questions, digital signature, and application received confirmation. This is also the location where the field labels for the text portions of the class spec and job postings can be changed.

Applicant Master Record: The primary and most current record of demographic information for an applicant including name, address, phone, e-mail, gender ethnicity, etc. The applicant master record is updated each time an applicant submits an application. Both e-mail and hard-copy notices use the mailing address or e-mail address that is stored in the applicant master record to ensure that the notice is sent to the most recent address provided by the applicant. HR Users also have the ability to edit the applicant master record without editing an applicant's application.

Approver: A department user (OHC user) who can approve or deny requisitions that have been routed to him/her for approval.

Benefit Code: The benefit language that is included on the job posting is based on the benefit code that is assigned to the job classification of the posting.

Certification List: See Referred List

Class Spec: A description of a grouping of similar jobs that are defined under a single job classification. The Class Spec within Insight includes a class code (class number), class title, the salary, benefit group, EEO code, FLSA status, etc. In addition, a detailed description of the job classification can be maintained within Insight including a summary of the job classification, detailed listing of job duties, minimum requirements and knowledge, skills, and abilities required for the position.

Classification (in Agency-wide Questions): Used to designate an agency-wide question as a particular type of question such as gender or ethnicity.

Custom Form Fields: Customer-defined fields that are added to a variety of tables within the system including the Requisition, Exam Plan, Applicant Master Record, Hire Process, Classification Spec, and Job Posting.

D

Department Approval Groups: Agencies that utilize one or more requisition approval steps define the approval groups. Each approval step requires a Requisition Approval Group (Department Approval Group) and each Requisition Group (Department Approval Group) may have many Requisition Users. Also referred to as Requisition Group.

Department Users: Users who authorized to login to the online hiring center to create requisitions, approve requisitions, review applications as a subject matter expert and/or review referred applicants as a hiring manager.

EEO Category: These are the categories each classification is assigned to for the federal EEO-4 report. The category list is maintained by NEOGOV and includes values such as Professionals, Paraprofessionals, Technicians, Officials & Administrators, etc.

Eligible List: List of applicants who have passed all evaluation steps and are eligible to be referred (certified) to hiring managers for hire.

Exam Plan: An Exam Plan is the comprehensive plan of all recruitment and selection activities related to a job posting. Contents include: job posting, recruiting (advertising) plan, evaluation steps (minimum qualifications review, training & experience review, exams, etc.), all applications and status of applicants, eligible lists, tasks and notes, and attached files.

Hiring Manager: A department user (OHC user) who can view referred applicants from an eligible list and take action to interview, offer, hire, or reject an applicant.

HR Users: Users who are authorized to login to Insight to access postings, applications and other exam plan-related items.

Interest Card: A record of an applicant's request to be notified of job postings that become open for jobs within a specific classification or posting category. Applicants access the interest cards through the job classification web page. Interest cards are maintained for twelve months or until the applicant unsubscribes from the interest card list, whichever comes first.

Internal Code: An internal code is a code that you assign to an agency-wide question, job-specific supplemental question, or custom form field when you use the 'Select from Choices' response type. A unique code should be specified for each response option. Insight uses this code to store the responses. These codes are necessary for tracking information in the applicant master record and for reporting accurate statistics, such as gender and ethnicity.

ns, and other exam-plan related information. Insight also includes a reporting component.

Liaison: A department user (OHC user) who can create requisitions, view requisitions created by others within the department(s) to which they have access, view SME Lists and Referral lists, and manage department user accounts within the department(s) to which they have access..

Locations: The work location to be displayed to applicants on a job posting. When creating a job posting, the recruiter must specify exactly one location.

Notices: E-mail or hard copy letters to applicants that an HR user can create for applicants within the evaluation steps or eligible list sections of an exam plan. Notices are created from user-defined notice templates.

Online Hiring Center (OHC): The Online Hiring Center (OHC) is the portion of Insight Enterprise where users in hiring departments login to the system as department users to create requisitions approve requisitions, review applications as a subject matter expert and/or review referred applicants as a hiring manager.

Originator: A department user (OHC user) who can create requisitions and cannot view any other user's requisitions.

Physical Class: This is a required field in the class spec table, but it is strictly an informational field, meaning that it does not have any special functionality that it is driving in the system. Some agencies use this class to keep track of the type of physical exam that is required of positions within the job class or to indicate the level of physical activity that is required of the position, i.e. desk job v. heavy lifting. Many agencies do not use this field, but because it is required, they just set up a single value in the set-up table and use that value on every job classification, something such as "1" or "n/a".

Referred List: List of eligible applicants who have been sent (referred or certified) to a hiring manager. Applicants are referred to a requisition which specifies who the hiring manager is. Applicants on an eligible list can be referred to multiple requisitions.

Requisition: A request to fill a position or positions. Completed by an originator or liaison in the hiring department. The requisition specifies the hiring manager for the position to be filled which determines who will receive the referred list of eligible candidates. Requisitions can be routed automatically for approval by using Department Approval Groups.

Requisition Group: Agencies that utilize one or more requisition approval steps define the approval groups. Each approval step requires a Requisition Approval Group (Department Approval Group) and each Requisition Group (Department Approval Group) may have many Requisition Users. Also referred to as Department Approval Group.

Salary Import: A tool for importing updates to minimum and maximum salaries. Changes in your agency's salary rates can be imported from a .CSV file into Insight to update the minimum and maximum salary rates in the previously created class specs.

Scoring Plan: Tool used to automatically score applicant's responses to job-specific supplemental questions. Scoring plans are created after job specific supplemental questions are added to a job posting by accessing the 'Scoring Plan' from the Job Posting page. Scoring plans are used in conjunction with an evaluation step-type of Supplemental Questionnaire which is a scored step.

Subject Matter Expert (SME): A subject matter expert (SME) is a user in a hiring department who is has specialized knowledge that enables them to evaluate applicants in a particular field of expertise. Applications can be assigned to a

SME for review and scoring during the evaluation steps of an exam plan, prior to placing applicants on an eligible list. SMEs review applications in the Online Hiring Center (OHC).

Veterans Points: Additional points can be granted to applicants who qualify for veteran's preference and who have been placed on the eligible list. From the eligible list, select 'Apply Points/Days of Service' in the 'Select Action' dropdown list.