NEOGOV OHC User Guide

This Training Guide focuses on approval workflows, requisitions, SME reviews, setting up templates and sending notices, scheduling interviews, roles, crosswalks, and menu changes. Job aids are available in the NEOGOV Resource Center.

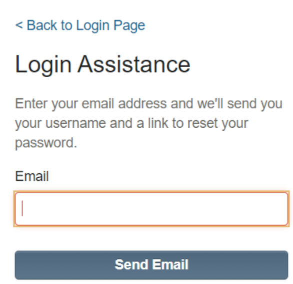
NEOGOV can be accessed by using the following link: https://login.neogov.com/ and works best with Chrome.

chrome

Users will use their existing username (full work email address) and password credentials to login.

Forgot Password

To reset your password, click the **Forgot your username or password** link below the login button. Enter your **email address** and click on **Send Email**. A message will be sent containing your username and a link to reset your password. If your account indicates Pending Activation, please contact your HR Office for an activation.



Prerequisite Requirements: Prior to starting a requisition, HR should ensure receipt of the following:

- New or updated Position Description.
- Approved screening criteria or other documentation, as required.
- Appropriate request to fill approvals.
- The hiring manager (and other appropriate staff, if necessary) has been assigned the NEOGOV Hiring Manager role.

Actions to be Taken:

The HR office should review and attach recall, departmental transfer, and interdepartmental transfer lists to the attachment section of the requisition or exam plan.

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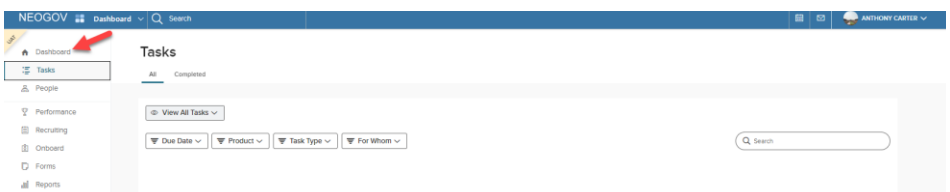
INDEX: Select a hyperlink below to navigate to that section.

Overview of the NEOGOV Unified Dashboard:

The **Unified Dashboard** serves as your personal homepage in NEOGOV. It contains the below sections specific to Recruiting:

1. **A left navigation** section
2. **Dashboard with Tasks and a Quick Actions** section.

You can always return to your Unified Dashboard by clicking on Dashboard in the upper left corner of your screen.

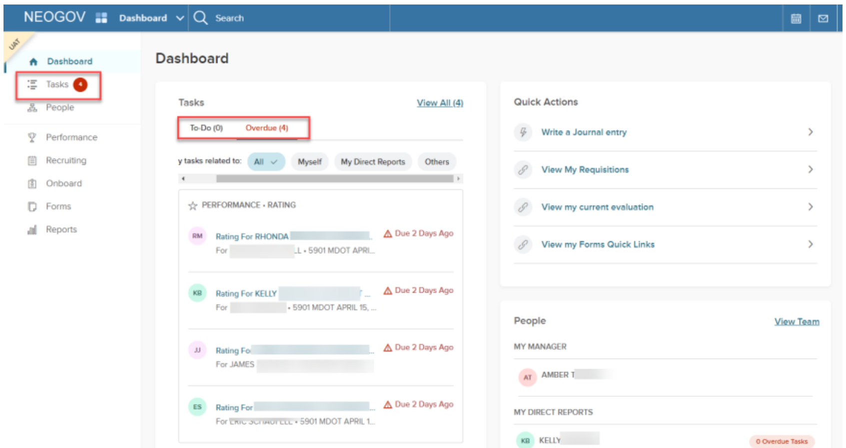


Left Navigation Tasks

1. This section displays Tasks spanning all NEOGOV products based on due date, with the earliest displaying first. Filter options include **Due Date, Product, Task Type,** and **For Whom**.
2. The **All** tab displays current and overdue tasks
3. The **Completed** tab displays finished tasks, such as completed **SME and candidate reviews**.

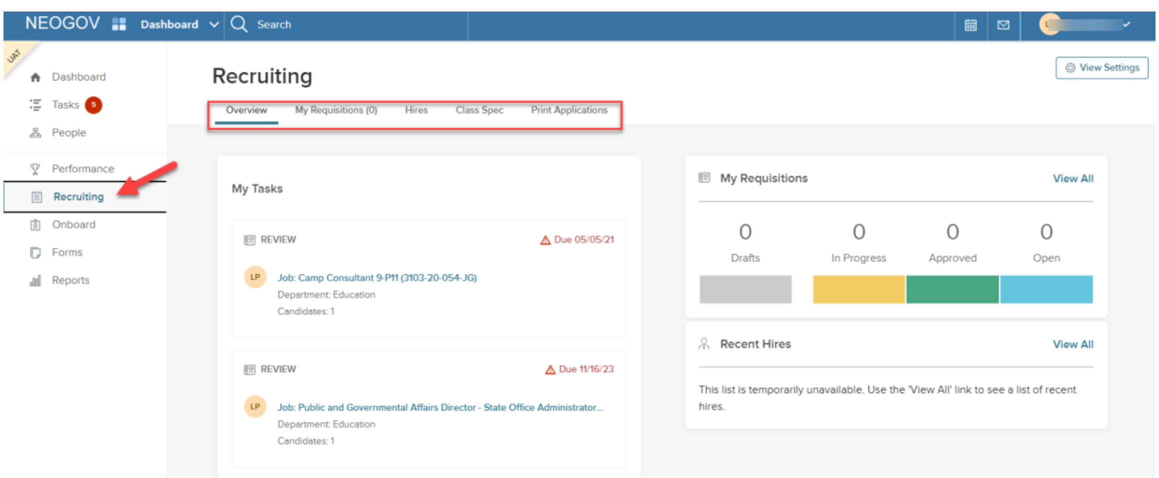
Dashboard Tasks

- Displays **To-Do and Overdue Tasks, Quick Actions, and People.**



Recruiting - This tab displays only for employees who have **Hiring Manager, Liaison, Originator,** or **Approver** security roles in OHC.

- **My Task Tabs**– Displays **Overview, My Requistions, Hires, Class Spec,** and **Print Applications** tabs.



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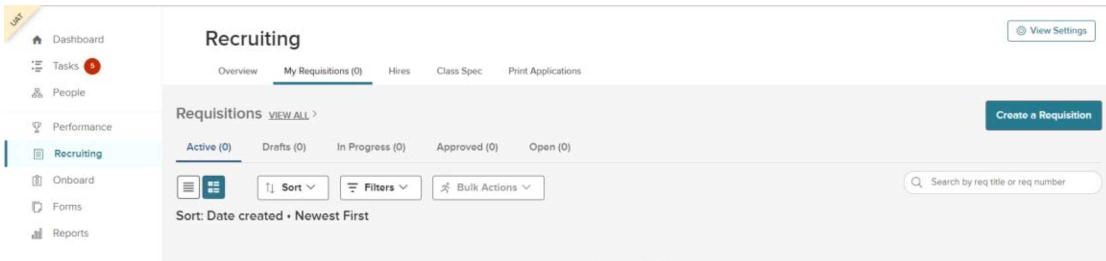
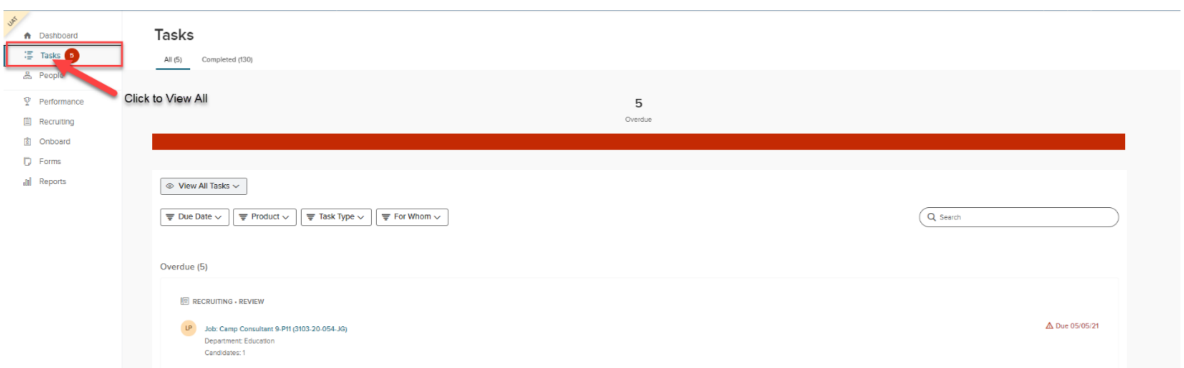
- **My Requisitions Tab** - Displays **Active, Draft, In-Progress, Approved,** and **Open** R**equisitions.**

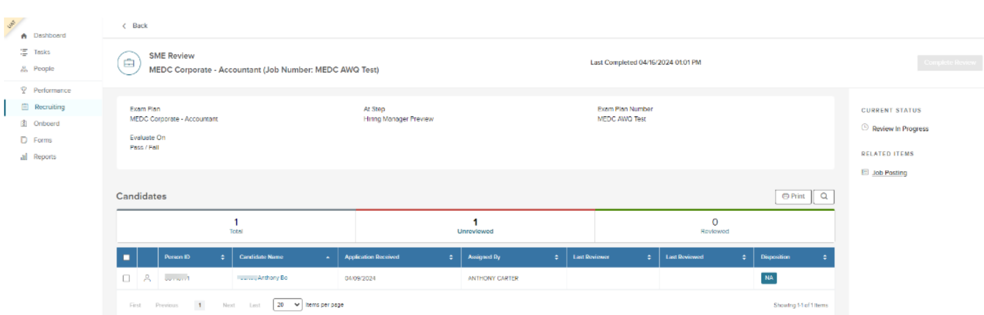


- **My Tasks (View All)**

  - The **All** tab displays up to 5 tasks based on due date, with the earliest displaying first. Alternately, the "**Completed** tab displays all previously completed tasks. This is where completed SME Reviews and Referred Lists can be found.

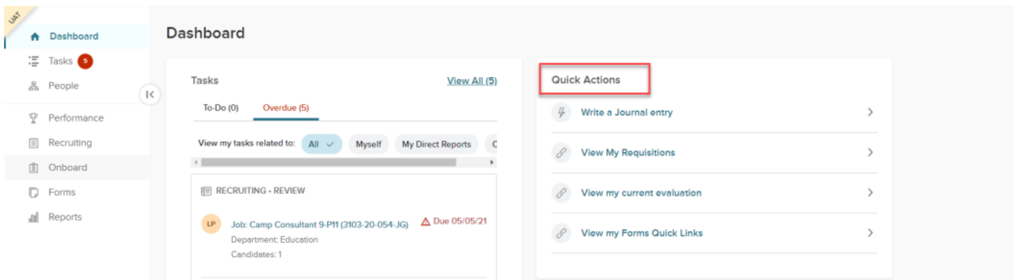


- Clicking on a task will direct you to Recruiting and the specific task you clicked on.

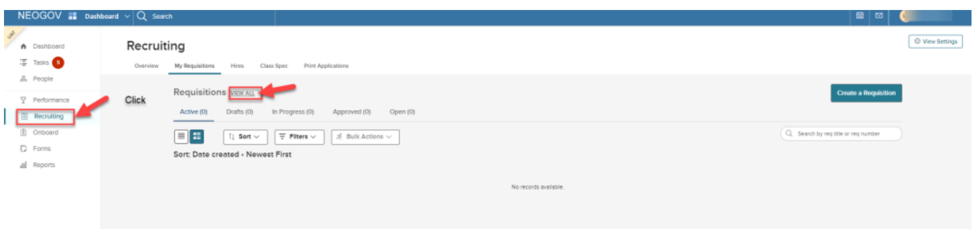


- **Quick Actions**

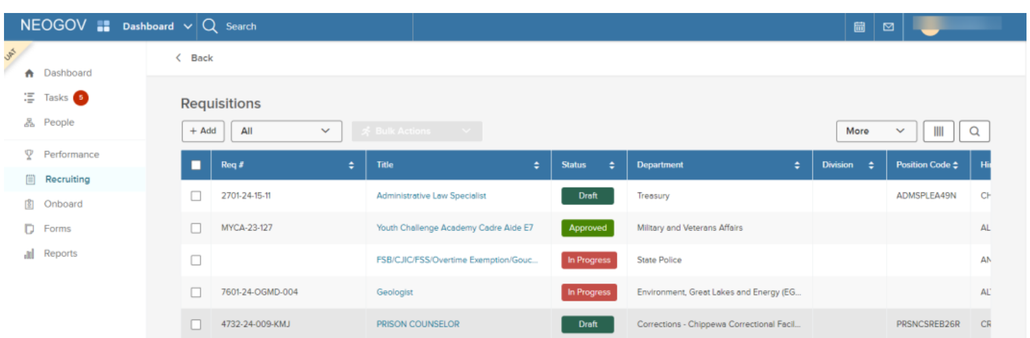
  Displays quick links for common actions. Options may include: **View My Requisitions,** and **View my Forms Quick Links** and is based on user security.



- OHC Dashboard - If you do not have any **To-Do** or **Overdue** recruiting tasks **appearing on the dashboard**, navigate to the module in the left navigation to view OHC activity. For example, to view **Recruiting** requisitions and hires, click **Recruiting, My Requisitions**, and View All.

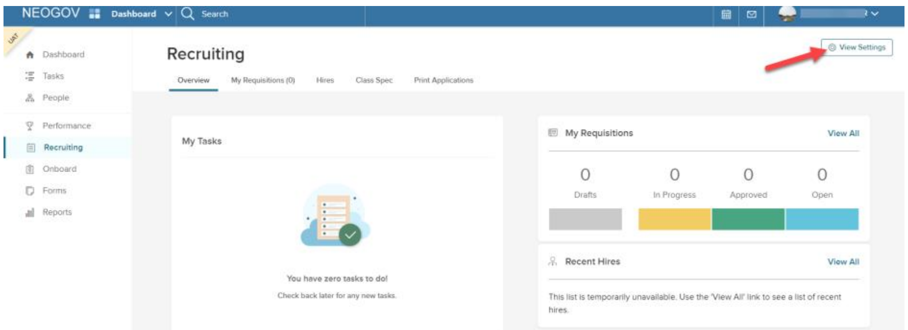


- All requisitions appear.

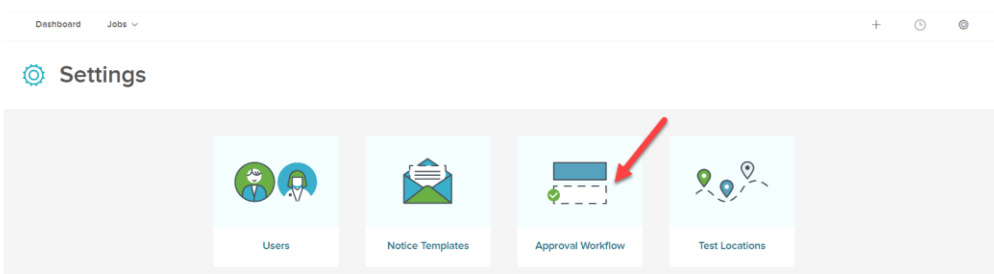


Create an Approval Workflow – Optional - The HR Liaison role can create and save approval workflows for your assigned department(s). If not using, skip to **Create a Requisition.** **Please note, if an approval workflow is created, it will apply to all requisitions in the department.**

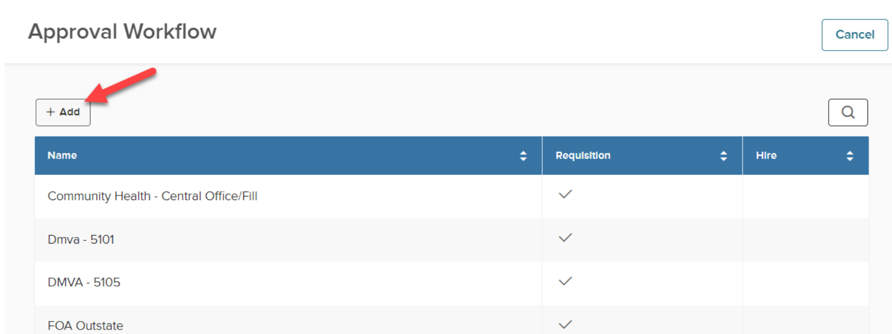
1. From the dashboard, Click **View Settings**.



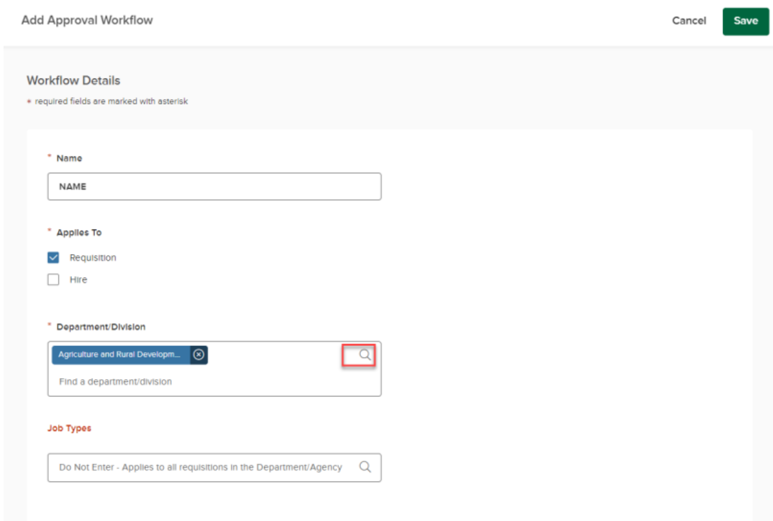
2. From the Settings menu, click the **Approval Workflow** icon.



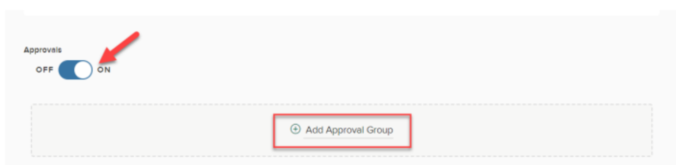
3. A new window will appear. Click the **+ Add** button.



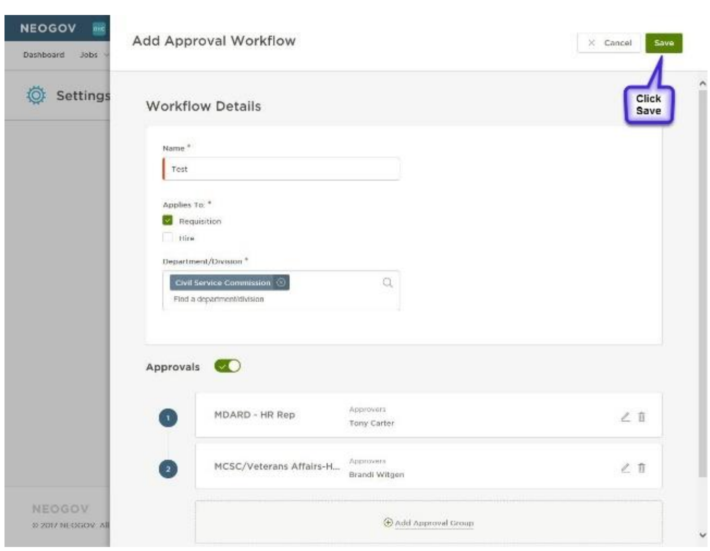
- Enter a **Name** and select from the **Applies To** field. Then, click the magnifying glass to search and select all applicable departments/divisions.



- Once a selection has been made in the **Department/Division** field, use the **Approval Group** drop-down to find approvers and select **Add Approval Step.** If no approvals are required, select the checkmark toggle next to **Approvals**.

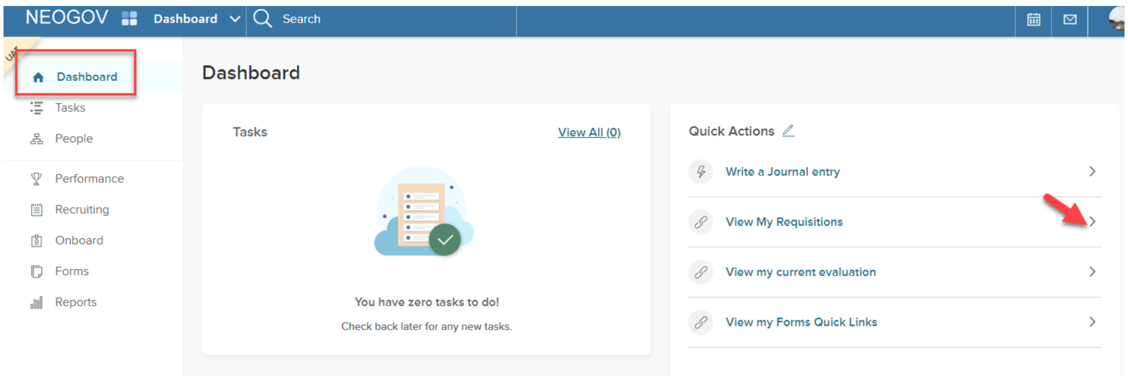


- Repeat these steps for each remaining approval group.
- Click **Save** to add your approval workflow.

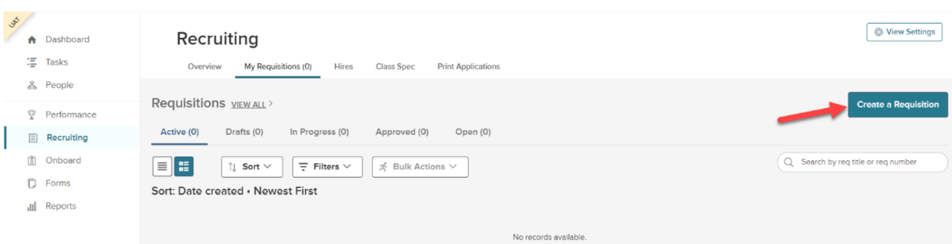


Create a Requisition (only available to Originator and HR Office roles Office)

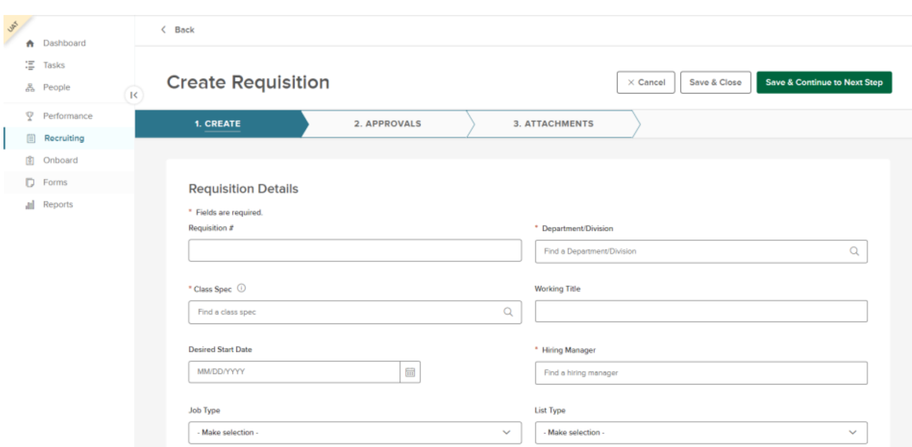
1. When a hiring department has an open position, they will submit a requisition as a request to fill the vacancy.
2. From the **Unified Dashboard** use the **Quick Actions** and click on **View My Requisition**.



3. Select **Create a Requisition**



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



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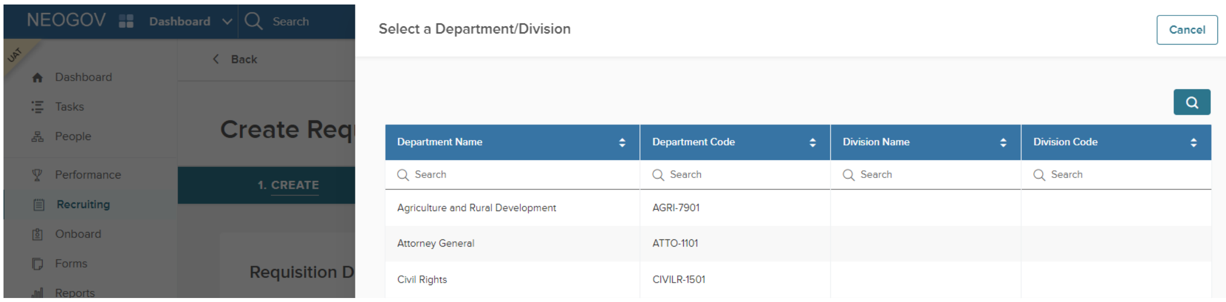
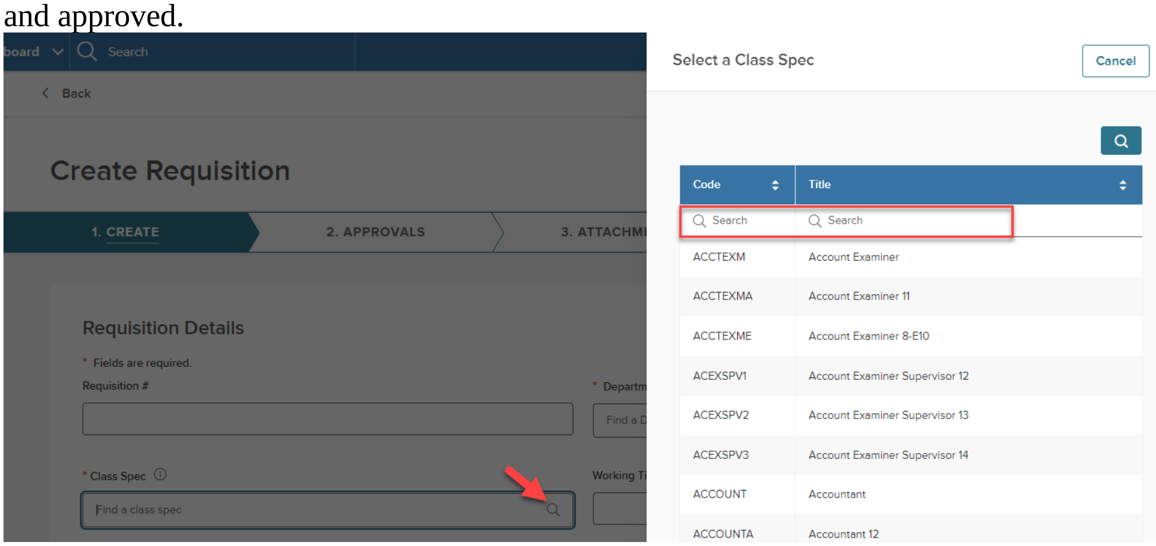
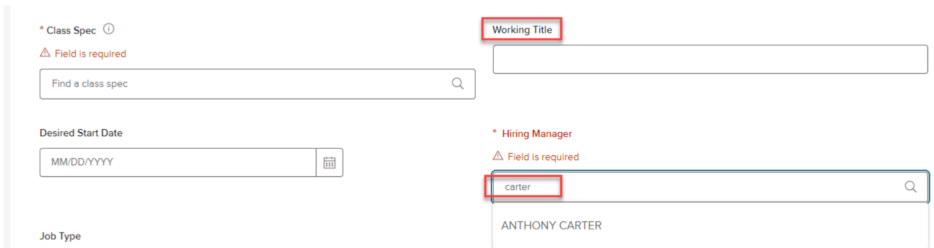
5. In the **Requisition #** field, enter the Requisition Number.
6. In the **Department/Division** field, select the search icon or enter the department name.
7. Search for the department by name.



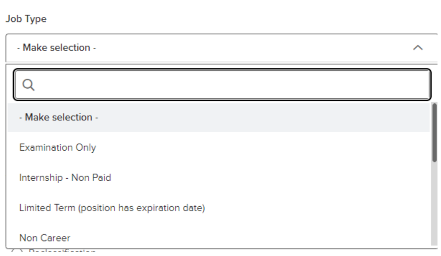
8. In the **Class Spec** field, select the search icon to access the list of specs. ***Please note that PE- and class spec titles in all Upper Case are not used for this process.*** You can now update the class spec after the requisition has been saved and approved.



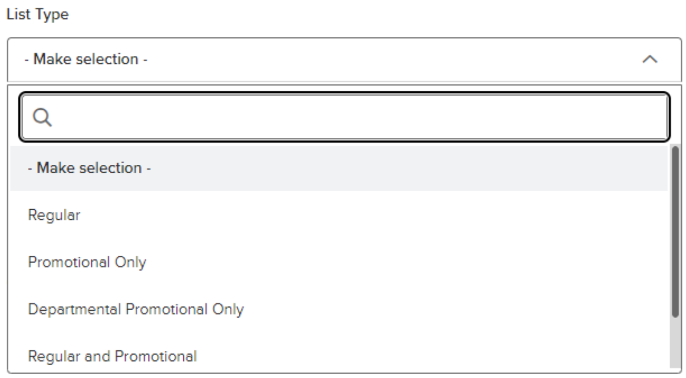
9. Enter the Working Title.
10. Enter the Desired Start Date.
11. In the Hiring Manager field, search for the hiring manager by entering the last name.



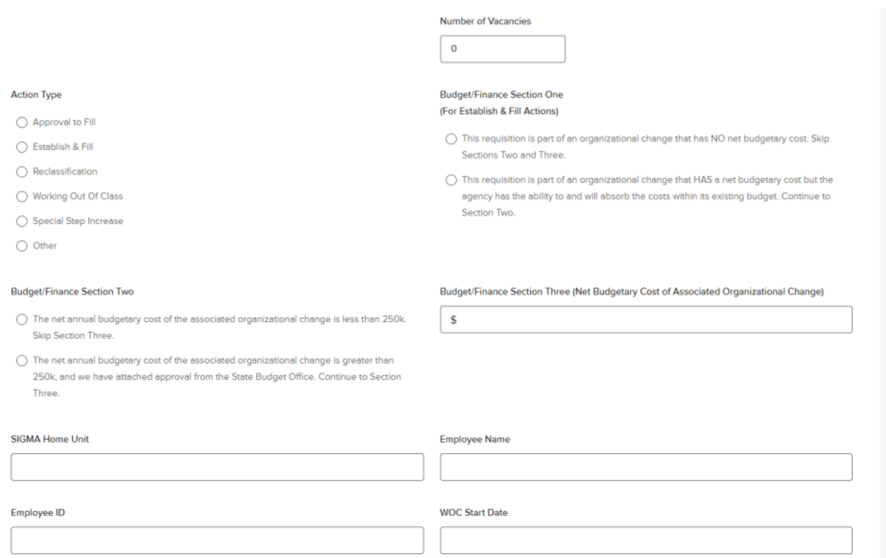
12. In **Job Type**, select the appropriate job term from the drop-down (choices are Examination ONLY, Internship – Non-Paid, Limited Term, Non-Career, Permanent Full Time, Permanent Intermittent, Permanent Part Time, Seasonal, SPS Contract and Unclassified).



13. In **List Type**, select the appropriate list type from the drop-down (select from Regular, Promotional Only, Departmental Promotional Only, Regular, and Promotional or Transfer).
14. Choose **Regular** for postings open to the public.
15. Choose **Promotional Only** for postings open to State employees only.
16. Choose **Departmental Promotional Only** or **Transfer** for postings open only to department employees.



17. Select an **Action Type.**
18. Fill in the remaining optional fields if applicable.



19. In **Position Details**, if the vacancy is for an existing position and the department tracks data on previous employees, click the **Add Position Detail** button.

20. Enter the **Position #, First Name, Last Name,** and **Vacancy Date**. Click the **Add Position Detail** button again to add any additional vacancies.

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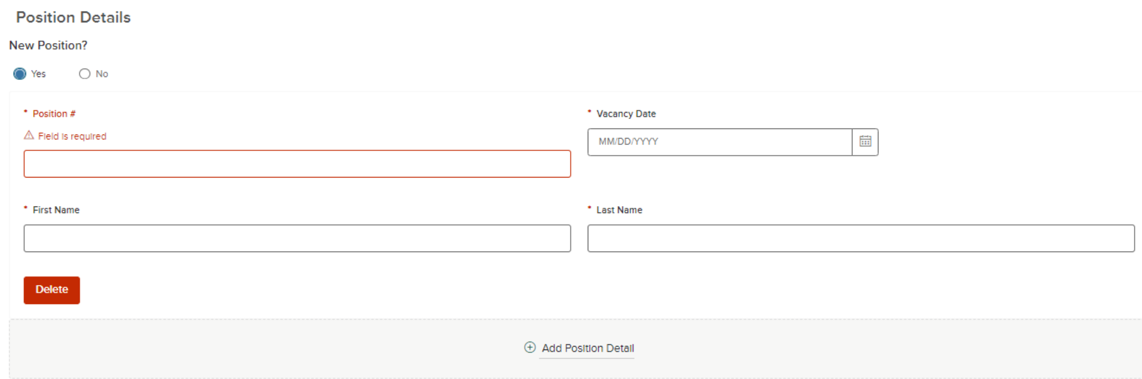
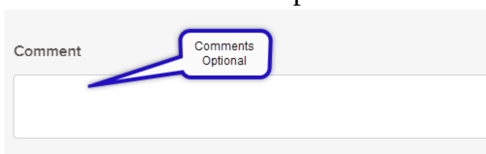
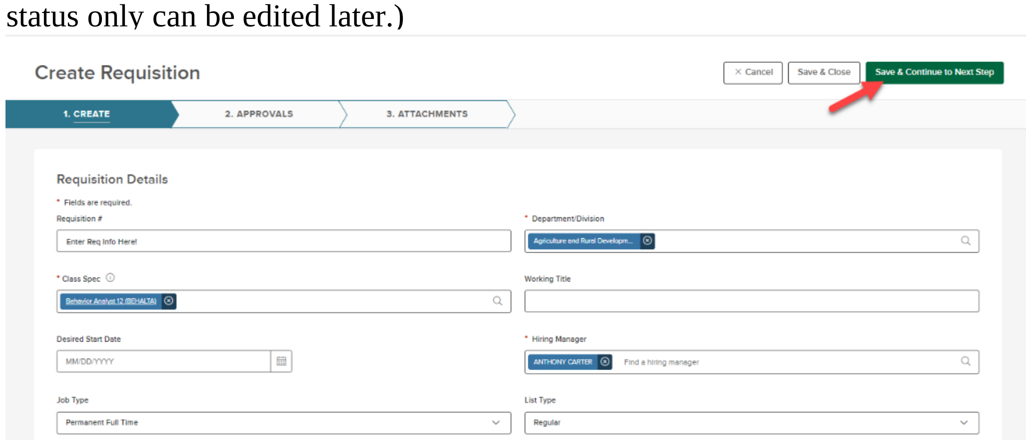


21. **Comment Section** is optional.

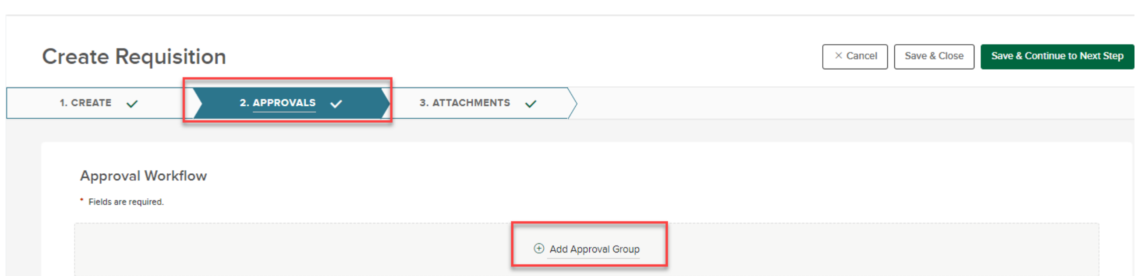


22. Complete the requisition details, click **Save & Close *only if the requisition should stay in "draft" status for future editing*.** If complete with the requisition process, click **Save & Continue to Next Step**. (Requisitions in **Save & Close** status only can be edited later.)

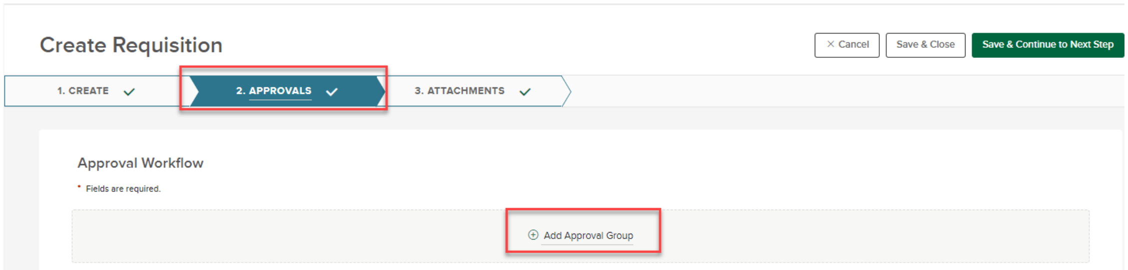


Create Approvals

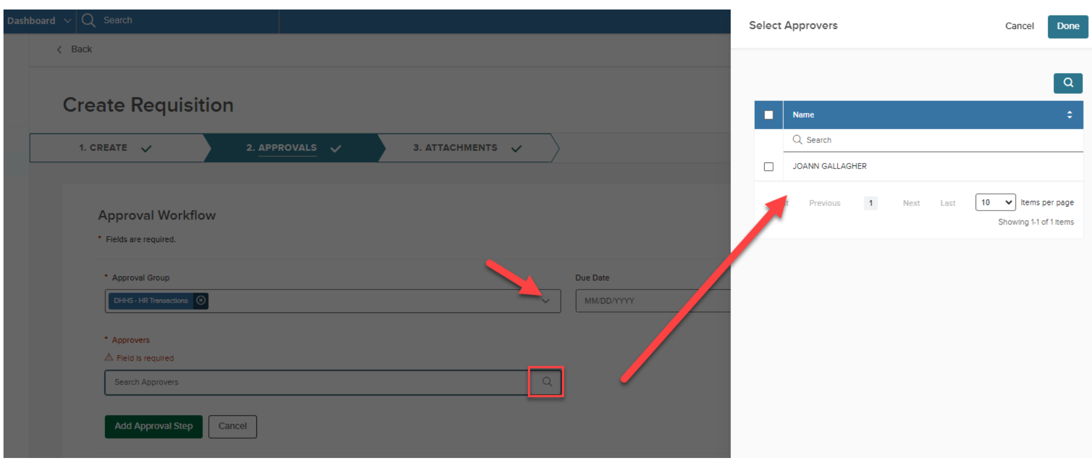
1. Selecting **Save and Continue** redirects to the **Approval** tab.



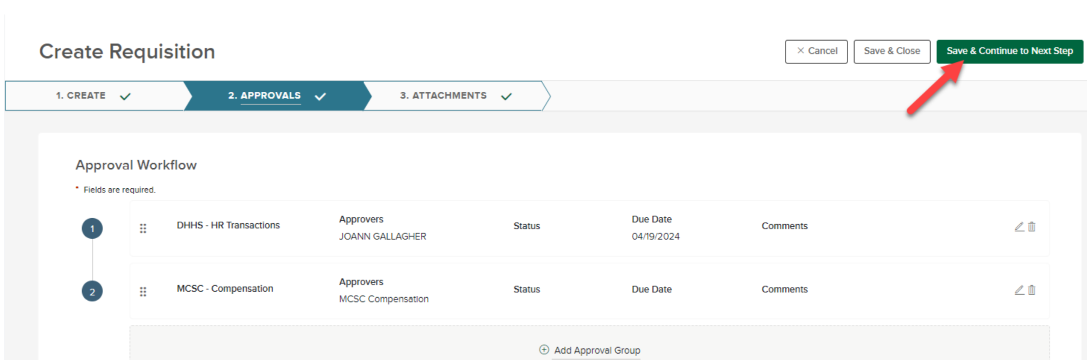
2. Select **Add Approval Group.**



3. Select the dropdown arrow to find the appropriate approval group.
4. Select the **Search** icon to open the window and select approvers.
5. The **Due Date** field is optional.
6. Continue the steps (2-5) above to add additional approval groups. The approval step must be saved in order to add another approval step.



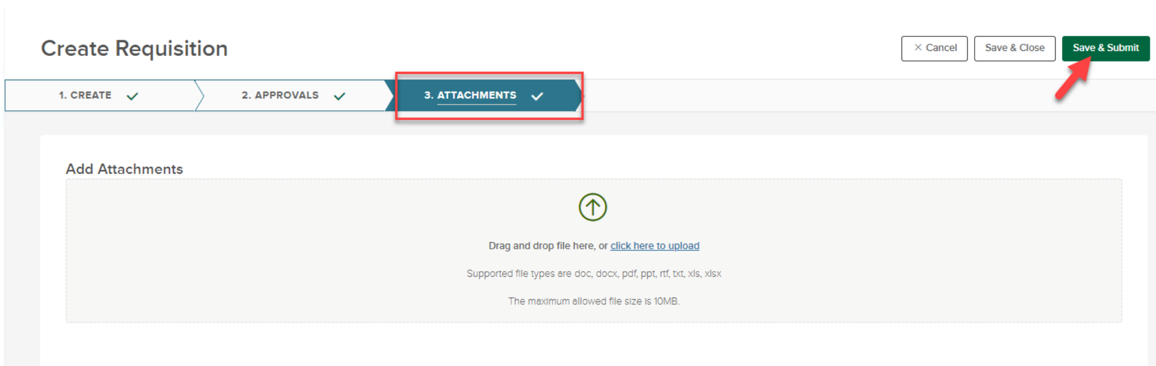
7. When done adding approval groups, select **Save & Continue to Next Step** to move to the next step.



Add Attachments

1. When adding attachments to the requisition the options are to upload or drag and drop the file attachments.
2. When finished adding attachments, click **Save & Submit**.

Note: If you are 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 (Approver role only)

1. If you have been assigned the OHC role of Approver, you can review a requisition sent to you for approval.

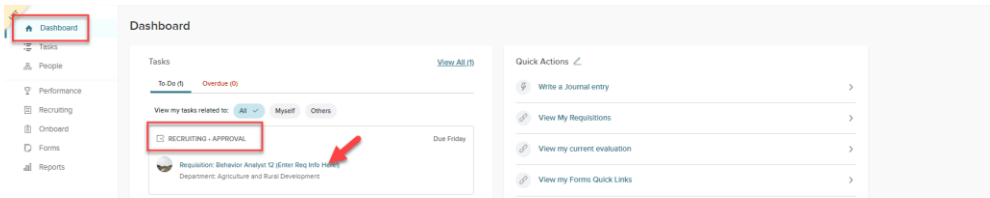
   In the example below, the defined approval path requires the requisition to travel through a total of four approval groups before going to HR.

2. Once the requisition creator clicks **Save & Submit**, the requisition will go to the first approval group. In this example, both approvers in Group 1 will be notified via email for their review. Like the previous version of the OHC, approval is on a first come first approve basis. Approvers from Group 1 will need to approve the requisition to move it to the next approval group.

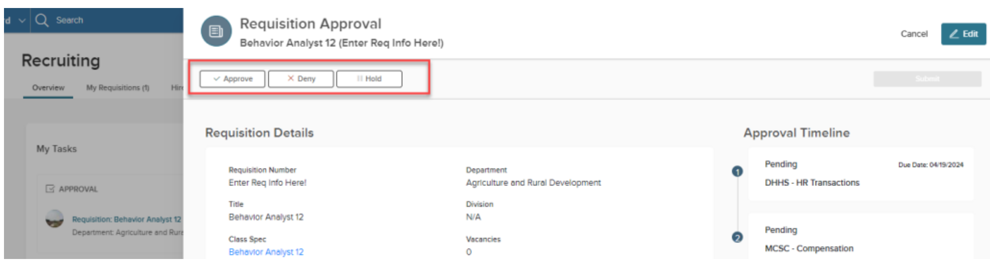
Approval Group	**Selected Approver(s)**
Group 1: Manager	Simon Davies and Melanie Scott
Group 2: Director	Joyce Lowe and Mark Campbell
Group 3: Budget	Nancy Reed
Group 4: President	Drake Thomas

Steps to Approve a Requisition

1. If you are not already viewing your dashboard page, click **Dashboard** from the upper left.
2. From the **My Tasks** section, click the requisition pending your review.



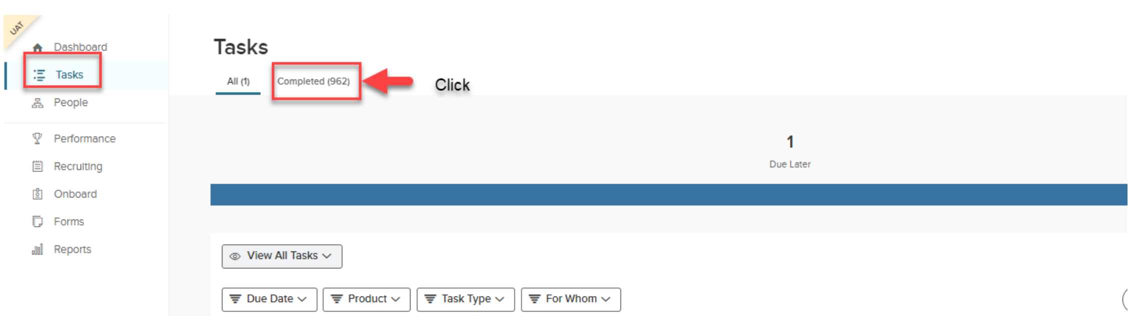
3. Click **Approve**, type any comments (optional), and click **Submit.**



Complete a SME Review

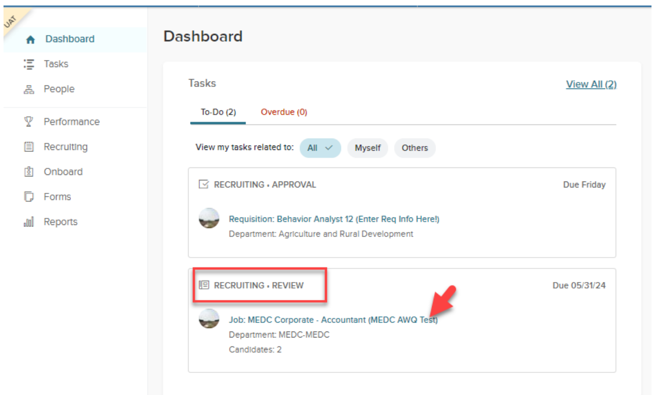
With the OHC role of SME, you can complete a SME review. SME reviews are used when HR enlists the expertise of their organization's subject matter experts (SMEs) to assist with the candidate selection process.

Note: To find previously completed SME reviews, click **Tasks** from the left navigation and then select **Completed**.

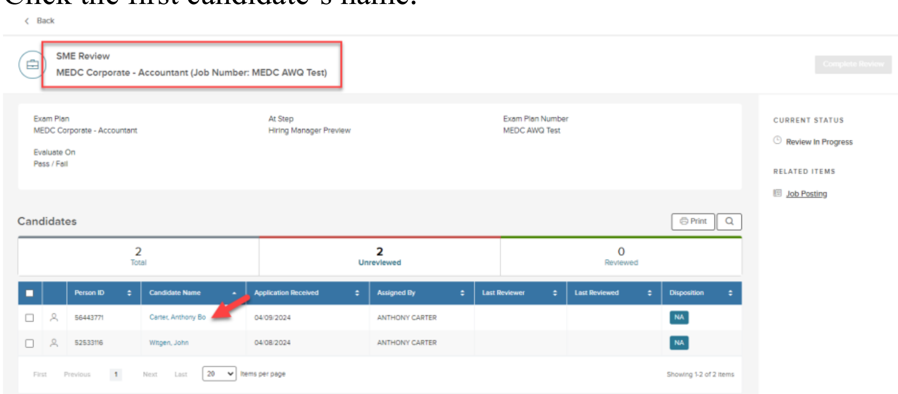


Steps to Complete a SME Review

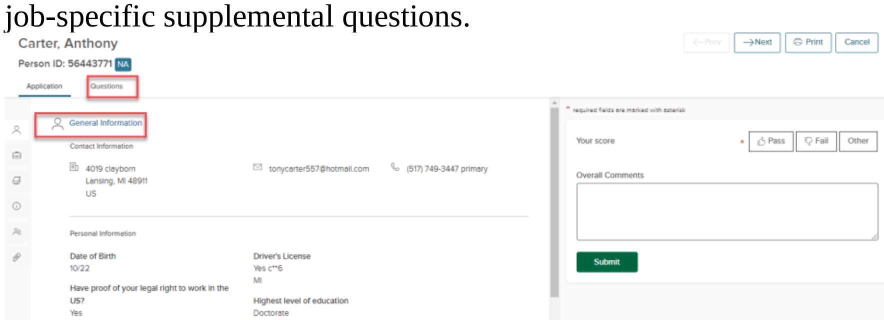
1. Click on **Tasks** from the Unified Dashboard to find your tasks associated with the recruitment process (under the **Recruiting Review category**).
2. From the **My Tasks** section, select the job for which a SME review should be completed.



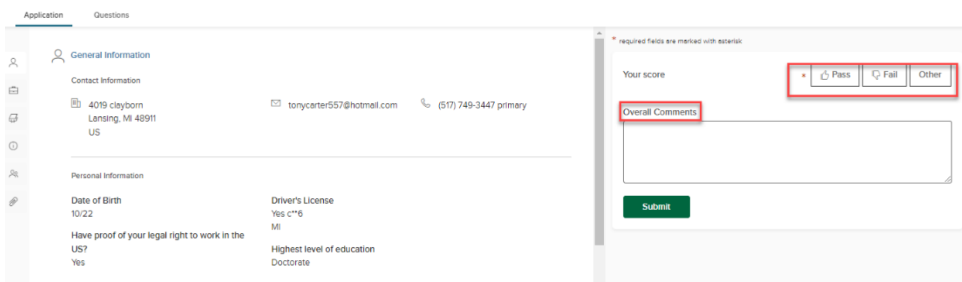
3. The candidate(s) will display.
4. Click the first candidate's name.



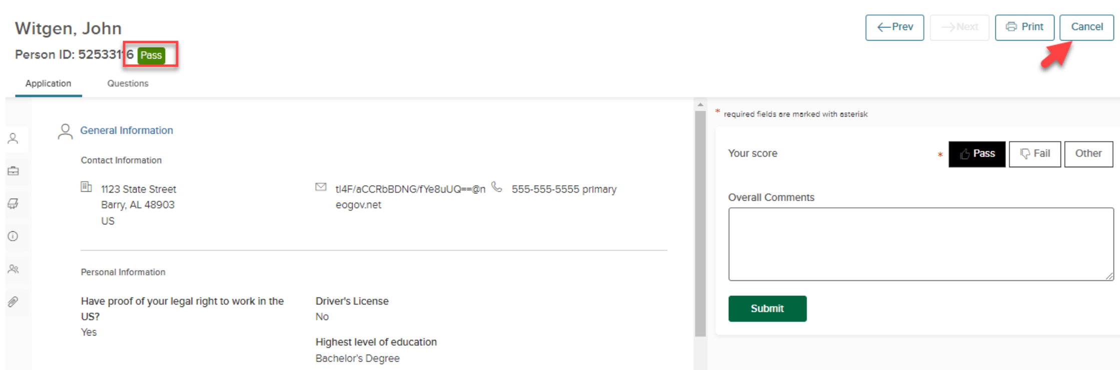
5. In the window, review the contact information, work experience, education, and other information.
6. Click the **Questions** tab to review the candidate's responses to agency-wide and job-specific supplemental questions.



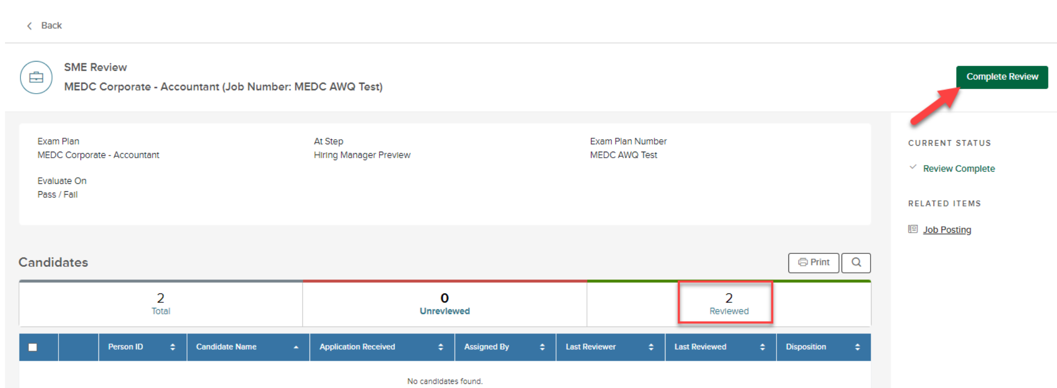
7. Review the information and select **Pass, Fail,** or **Other** and enter **Overall Comments.**
8. Select **Submit.**



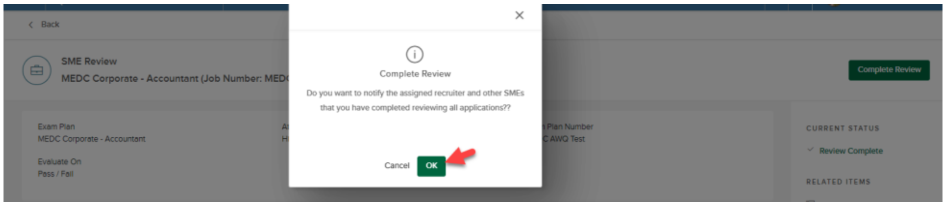
9. The next candidate appears.
10. Complete steps 6-9 above for each successive candidate.
11. Select Cancel to return to main SME Review Page.



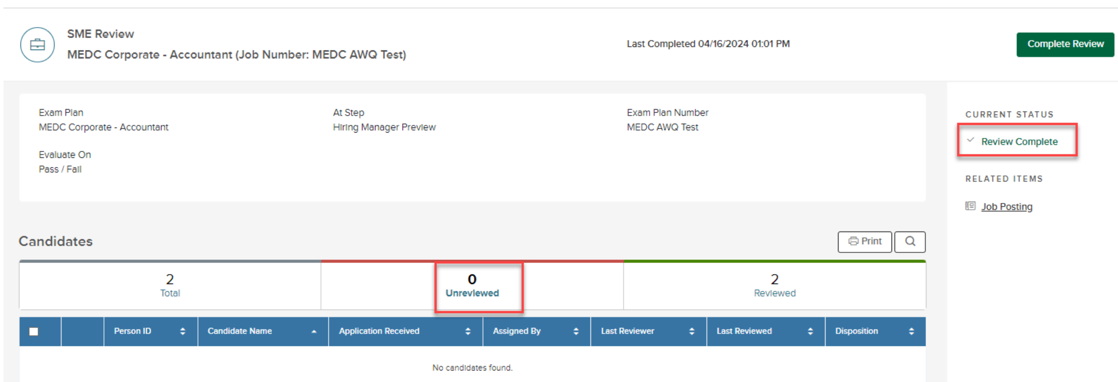
12. Once the review is complete select the **Complete Review** button.



13. Review the pop-up message and select **OK**.



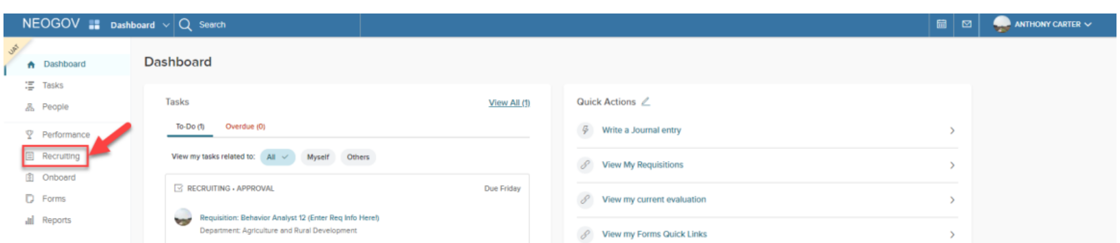
14. Notice, there are no unreviewed candidates, and the SME review status is complete.



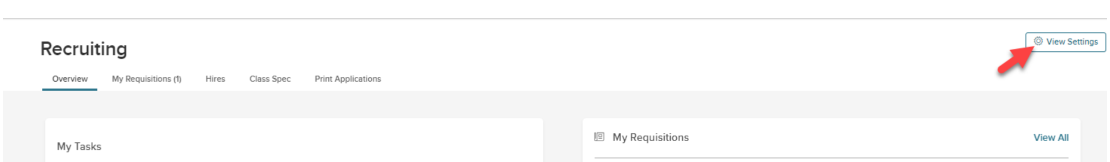
Notice Templates (Applies to specific security roles)

With the OHC permission of Create OHC Notice Templates, you can create a notice template for your assigned department(s). Notice templates can be used for a variety of notice types including interview scheduling, assessment results, candidate rejection and job offer.

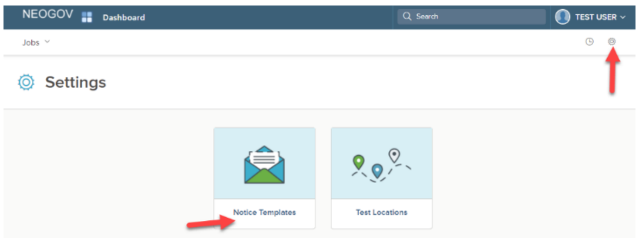
1. On the NEOGOV Dashboard, click **Recruiting** from the left navigation.



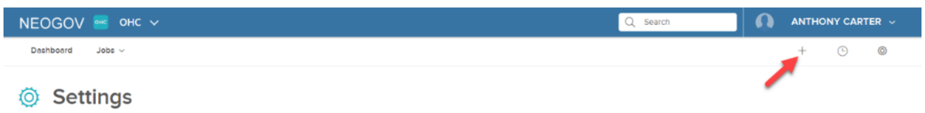
2. Click **View Settings.**



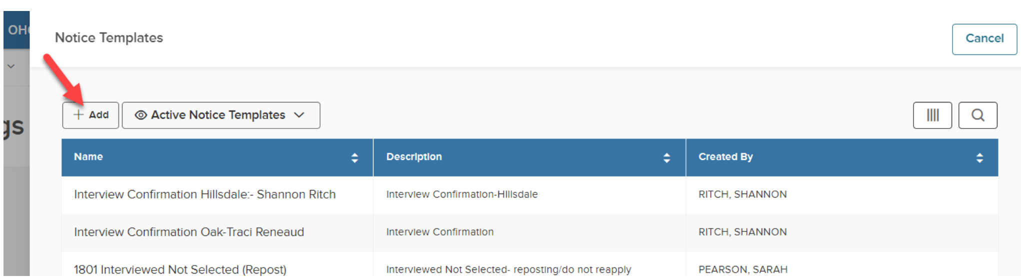
3. Click the **Notice Template** icon.



4. Click on the **+ icon**.



5. The active notices templates appear in the window.
6. Select **Add.**



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

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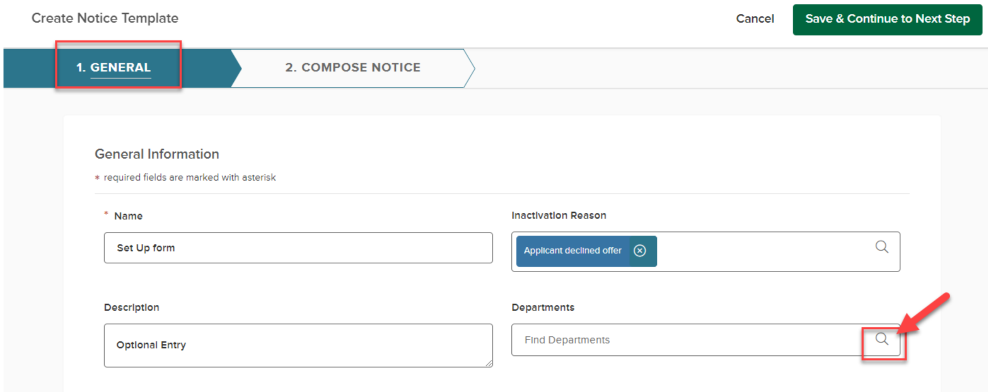
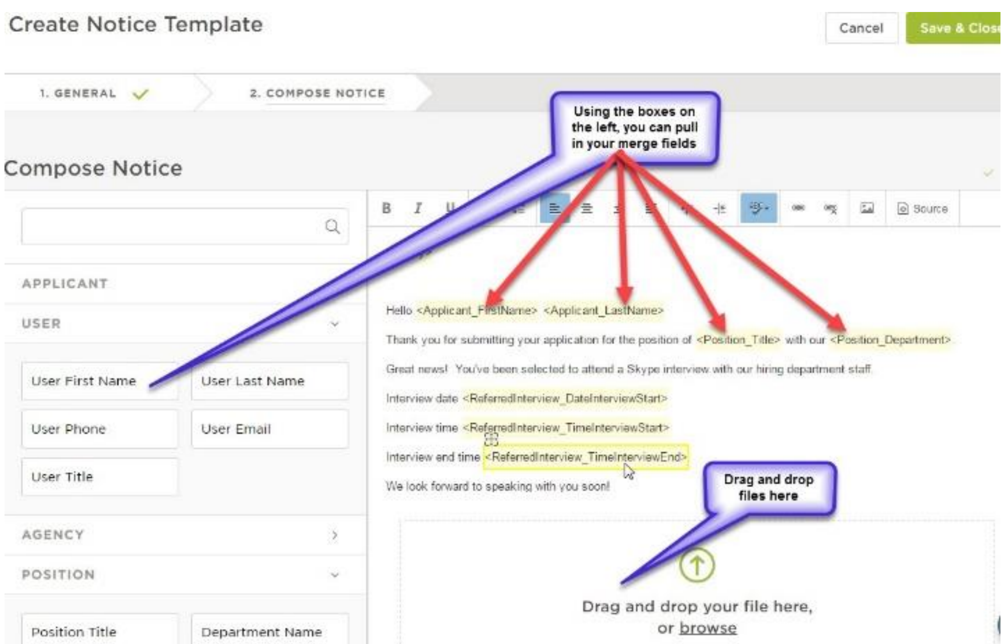


8. Type the contents of the notice template. When a merge field is required, locate it using left-side search and then drag to the proper area of the notice. Also, drag any applicable files to the attachments section.
9. Once complete, click **Save & Close**.



Schedule Interviews

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

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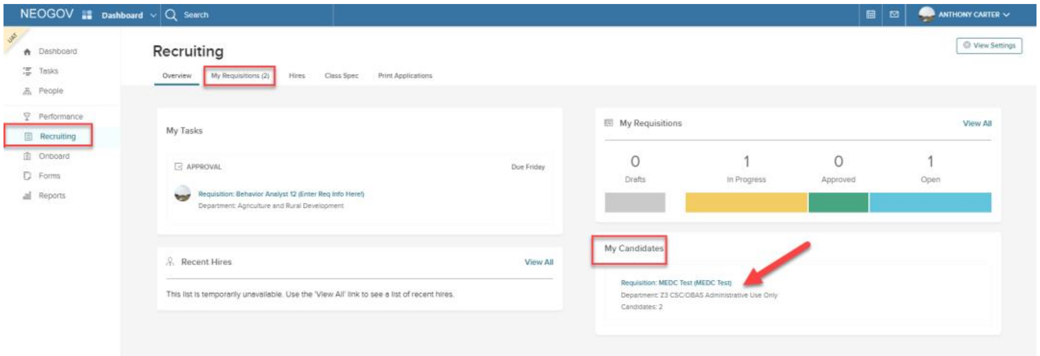
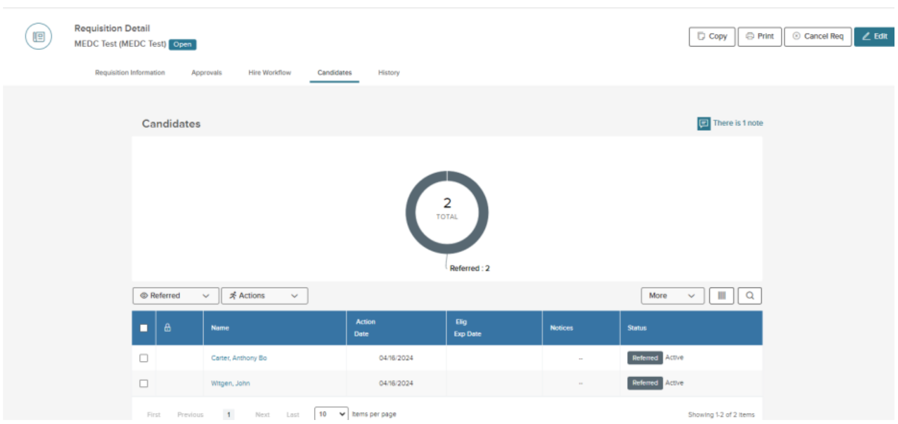
1. Select **Recruiting** from the left navigation, In the **My** Candidates section, click the open requisition that requires the scheduling of interviews.



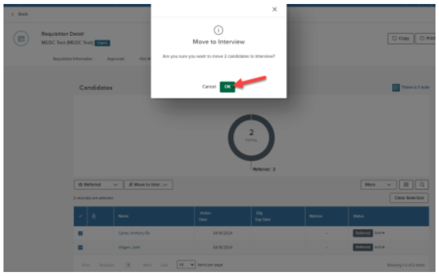
2. You are now viewing the candidates from the referred list.



3. Select the candidate(s) that will be moved to the interview step.

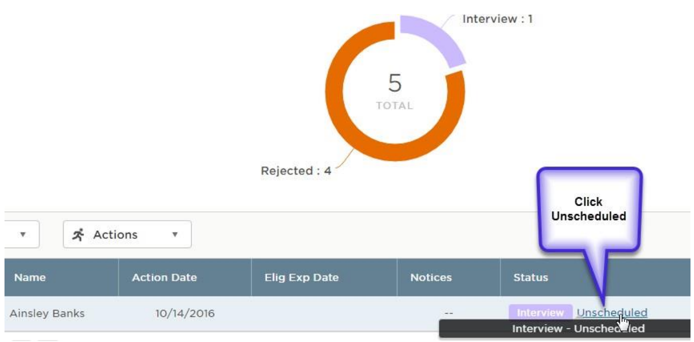
4. On the **Actions** menu, click **Move to Interview**.

5. Click **OK** to confirm moving the candidates.



6. On the doughnut chart, click **Interview**, or on the **Candidate** menu, click **Interview**.

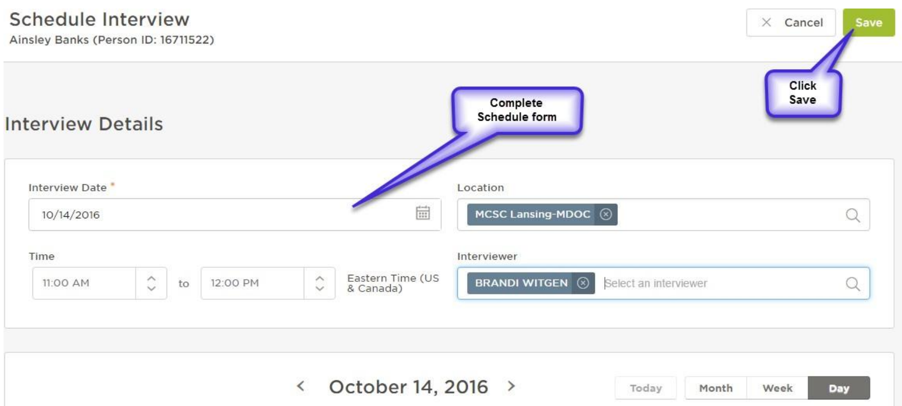
7. From the first candidate to be scheduled for an interview, click **Unscheduled**.



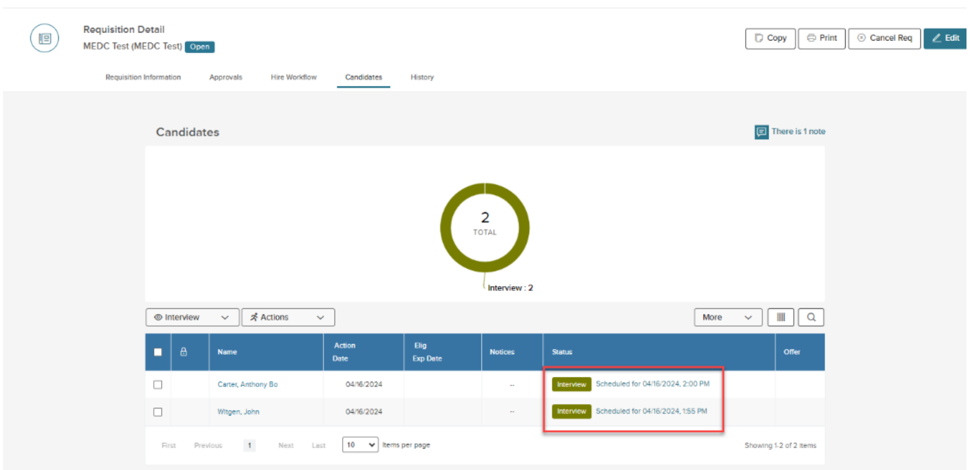
8. Complete the **Schedule Interview** form and click **Save**.

   Note: When searching for the Interviewer, the field displays all users with the OHC role of Rater – spanning all departments/divisions. If a name you are searching for does not appear, this user does not have the role of Rater.

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



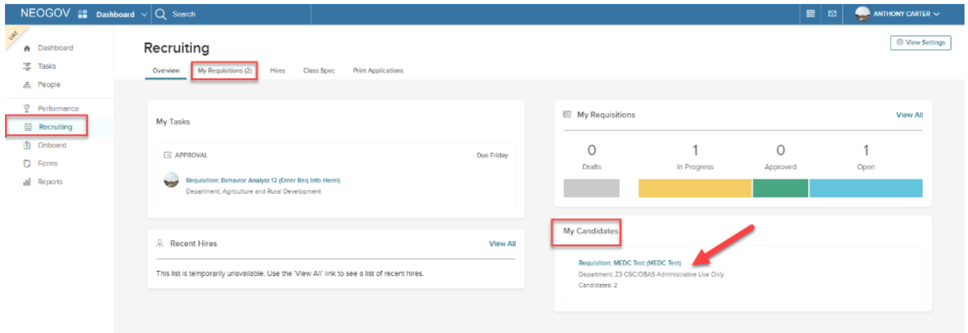
10. The status column now shows the interview information.



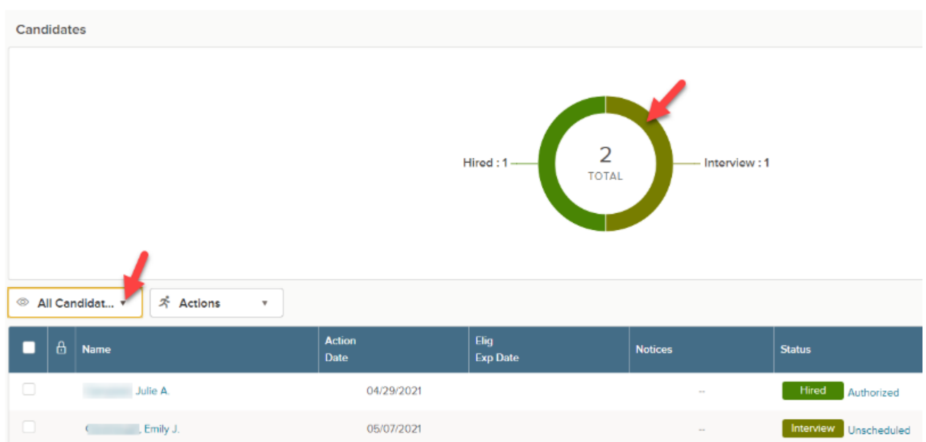
Send Notices

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

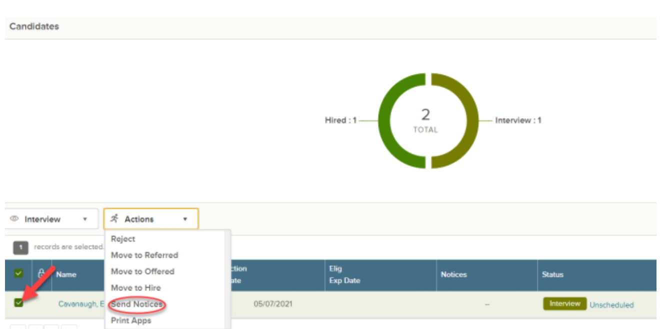
1. If you are not already viewing the referred list of candidates, select **View My Requisitions i**n the **Quick Actions** section of your dashboard.
2. In the following image, go to the **My Candidates section** and select the link in the right column.



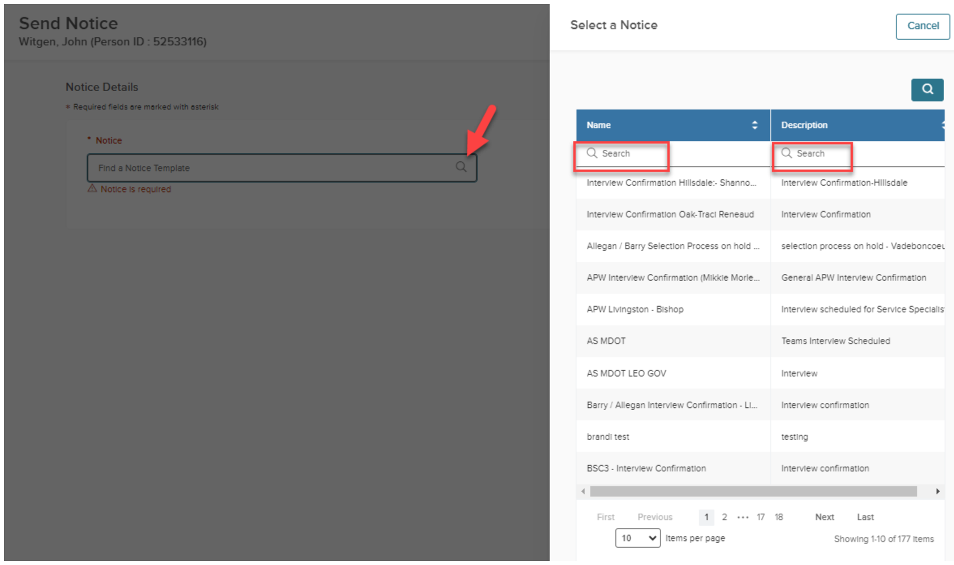
3. You are now viewing the referred list. On the **Candidates** menu, click the doughnut chart or on the **All Candidates** drop-down to send notification.



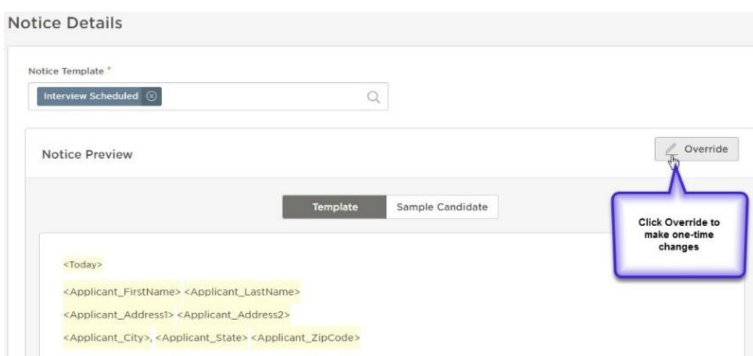
4. Select the candidates to receive notices by checking the box next to their name.
5. On the **Actions** menu, click **Send Notices**.



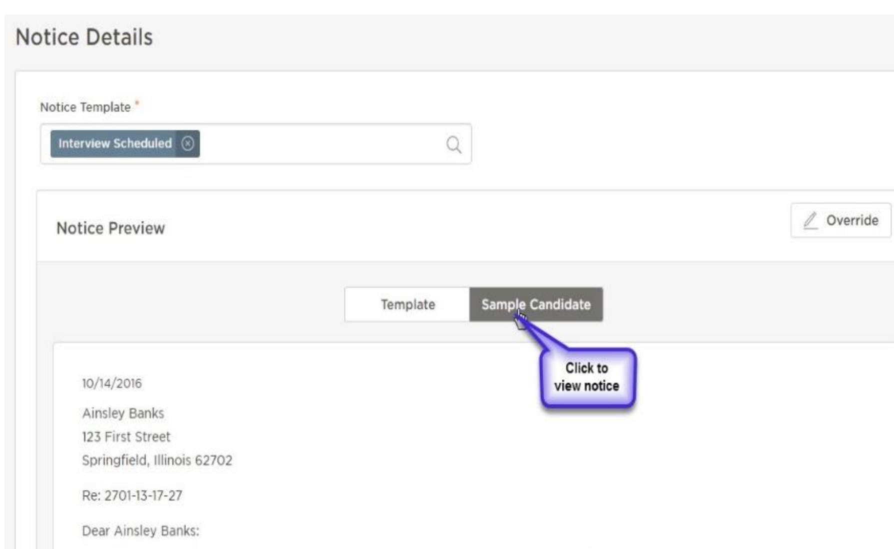
6. Search the notice template field.
7. Select a notice template.



8. 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.



9. Click **Sample Candidate** to view the notice with merged text.



10. Click **Send** to send the notice to selected candidates.

Additional Information: Technical related questions can be directed to the mailbox at: MCSC-NEOGOV@michigan.gov.