

## 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.



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.

The screenshot displays two parts of the NEOGOV user interface. On the left is the main login page, featuring the NEOGOV logo at the top, followed by 'Username' and 'Password' input fields. Below these is a 'Log In' button and a link that reads 'Forgot your username or password?'. A note states 'All fields are required'. On the right is the 'Login Assistance' page, which includes a '< Back to Login Page' link, the heading 'Login Assistance', and instructions: 'Enter your email address and we'll send you your username and a link to reset your password.' Below this is an 'Email' input field and a 'Send Email' button.

**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.

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

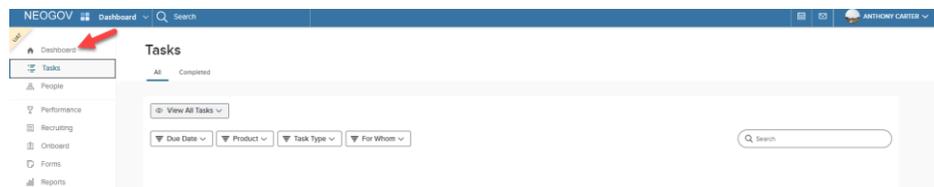
- [Unified Dashboard](#)
- [OHC Dashboard](#)
- [Create a Requisition](#)
- [Approve a Requisition](#)
- [Complete a SME Review](#)
- [Find a Completed SME Review](#)
- [Set up a Notice Template](#)
- [Send Notices](#)
- [Schedule Interviews](#)

## Overview of the NEOGOV Unified Dashboard:

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

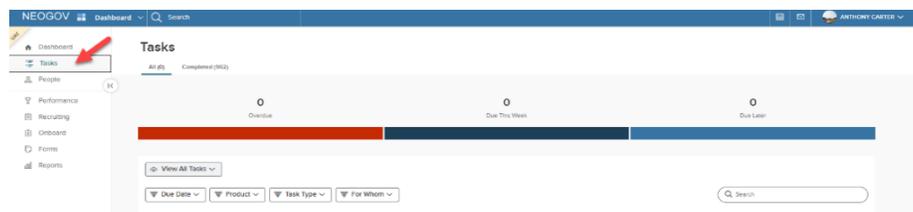
1. **A left navigation section**
2. **Dashboard with Tasks and a Quick Actions section.**

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



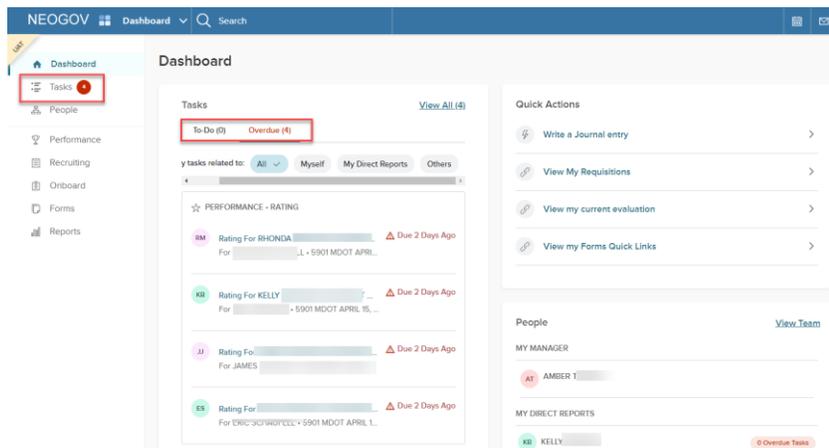
## Left Navigation Tasks

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.**



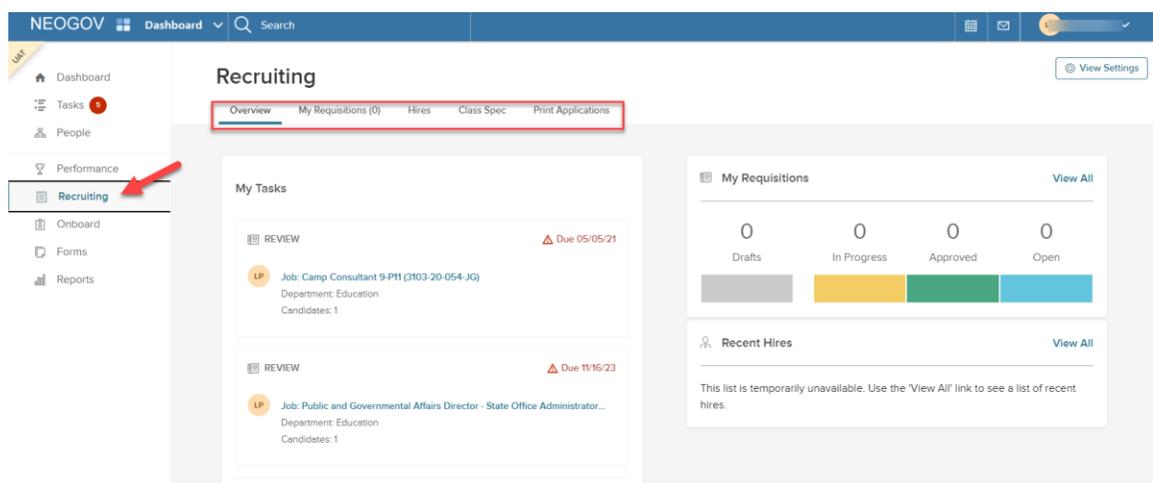
## Dashboard Tasks

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

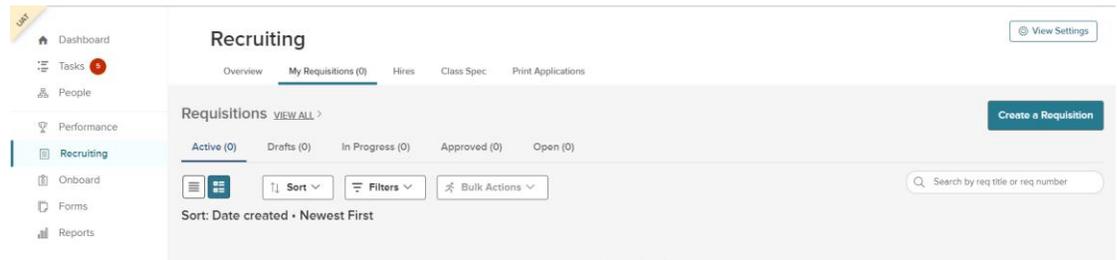


**Recruiting** - This tab displays only for employees who have **Hiring Manager, Liaison, Originator, or Approver** security roles in OHC.

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

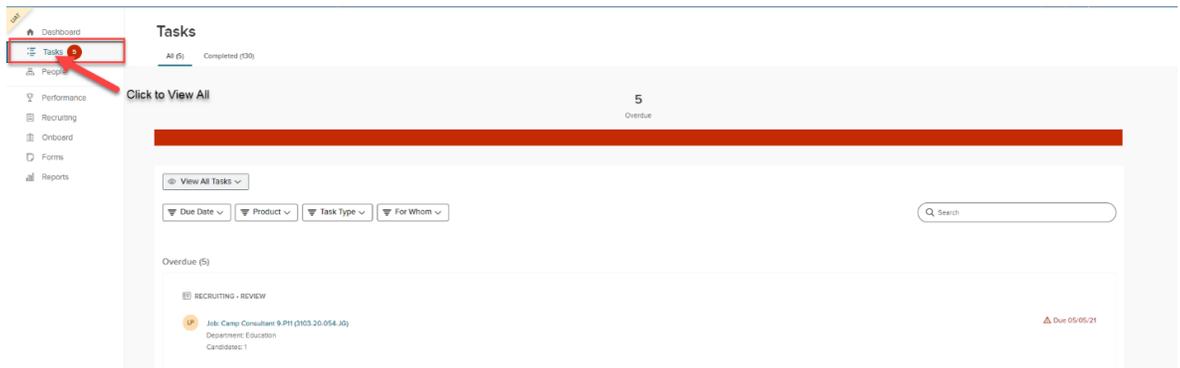


- **My Requisitions Tab - Displays Active, Draft, In-Progress, Approved, and Open Requisitions.**

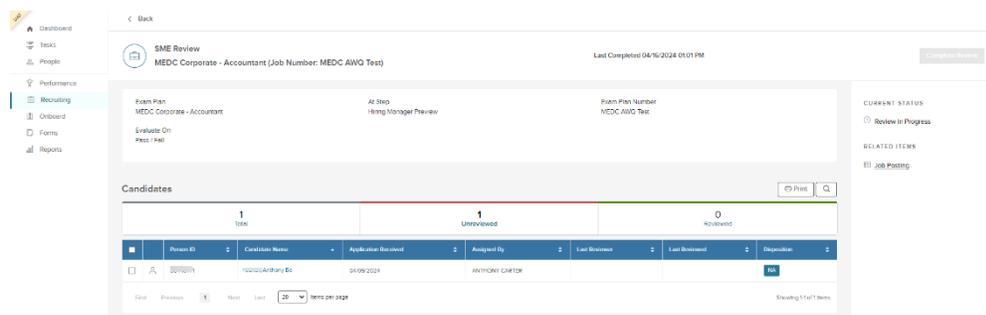


- **My Tasks (View All)**

- 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.

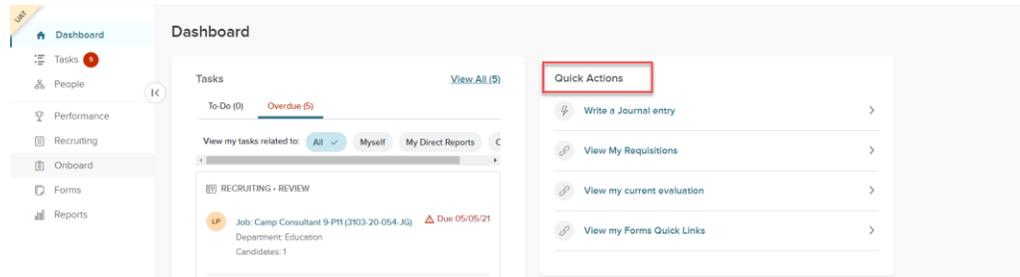


- Clicking on a task will direct you to Recruiting and the specific task you clicked on.

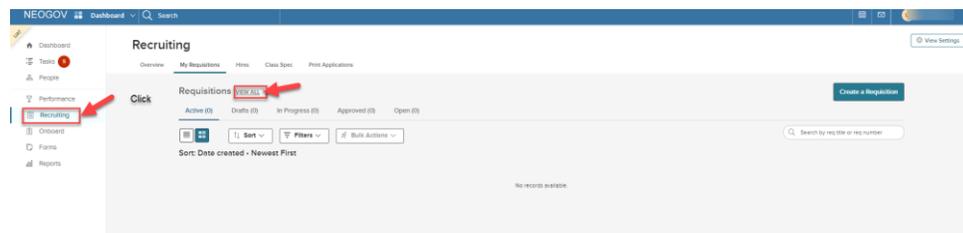


- **Quick Actions**

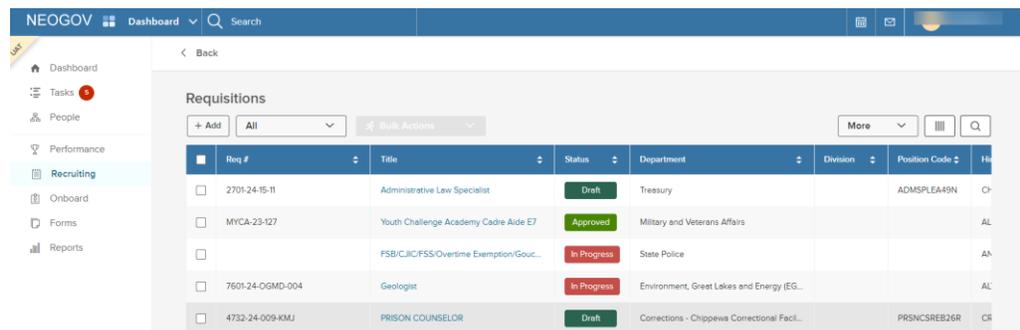
Displays quick links for common actions. Options may include: **View My Requisitions**, and **View my Forms Quick Links** and is based on user security.



- **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**.

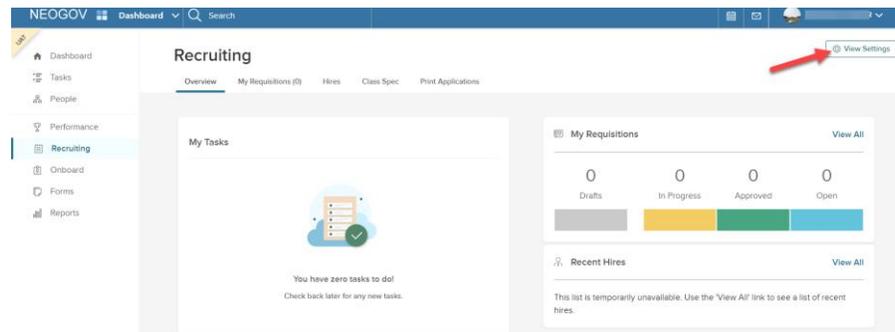


- All requisitions appear.

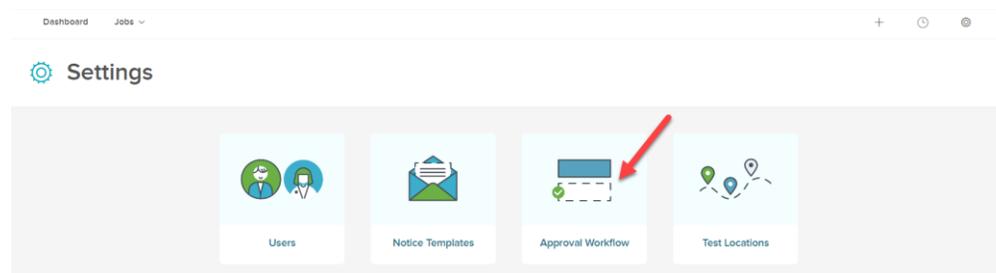


**Create an Approval Workflow – Optional** - The HR Liaison role can create and save approval workflows for your assigned department(s). If not using, skip to [Create a Requisition](#). Please note, if an approval workflow is created, it will apply to all requisitions in the department.

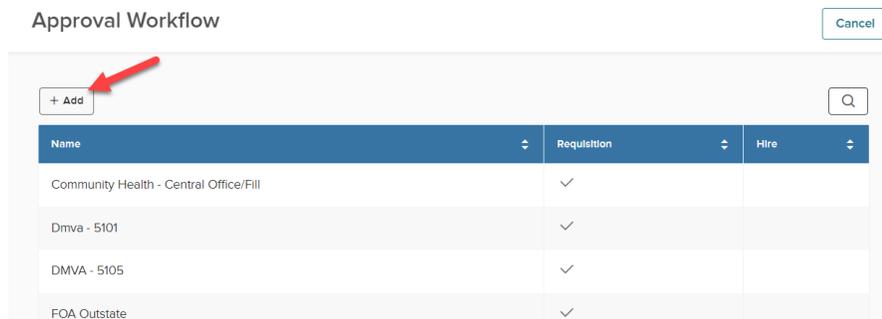
1. From the dashboard, Click **View Settings**.



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.

Add Approval Workflow Cancel Save

Workflow Details  
\* required fields are marked with asterisk

\* Name  
NAME

\* Applies To  
 Requisition  
 Hire

\* Department/Division  
Agriculture and Rural Develop... 🔍  
Find a department/division

Job Types  
Do Not Enter - Applies to all requisitions in the Department/Agency 🔍

- 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**.

Approvals OFF  ON

+ Add Approval Group

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

NEOGOV Dashboard Jobs

Settings

Add Approval Workflow Cancel Save

Workflow Details

Name \*  
Test

Applies To \*  
 Requisition  
 Hire

Department/Division \*  
Civil Service Commission 🔍  
Find a department/division

Approvals

1	MDARD - HR Rep	Approver: Tony Carter	<span>🗑️</span>
2	MCSC/Veterans Affairs-H...	Approver: Brandt Wilgen	<span>🗑️</span>

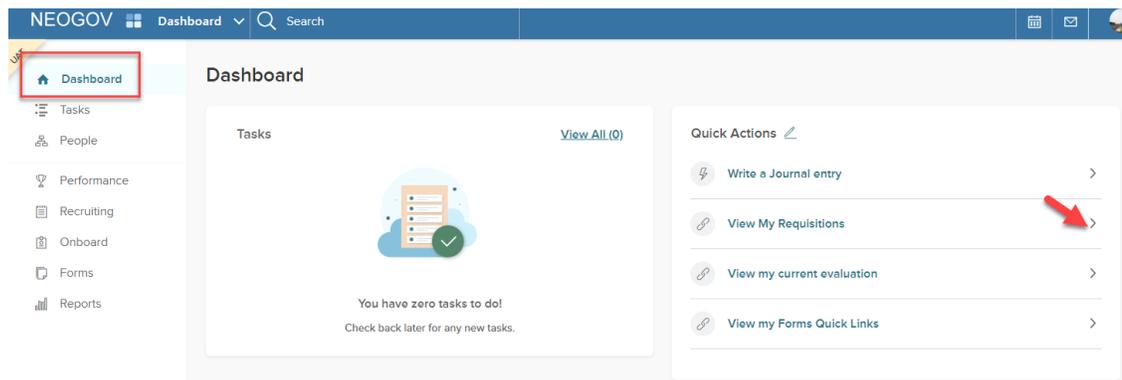
+ Add Approval Group

Click Save

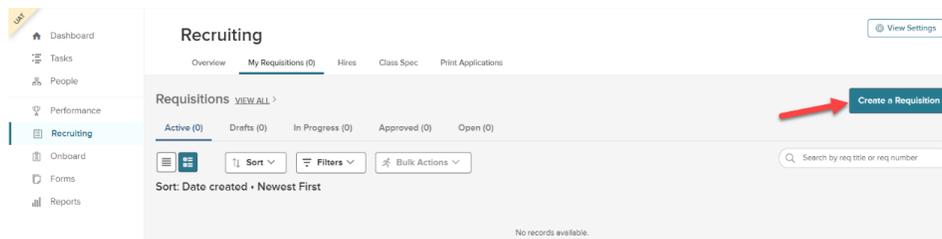
NEOGOV  
© 2017 NEOGOV, AF

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

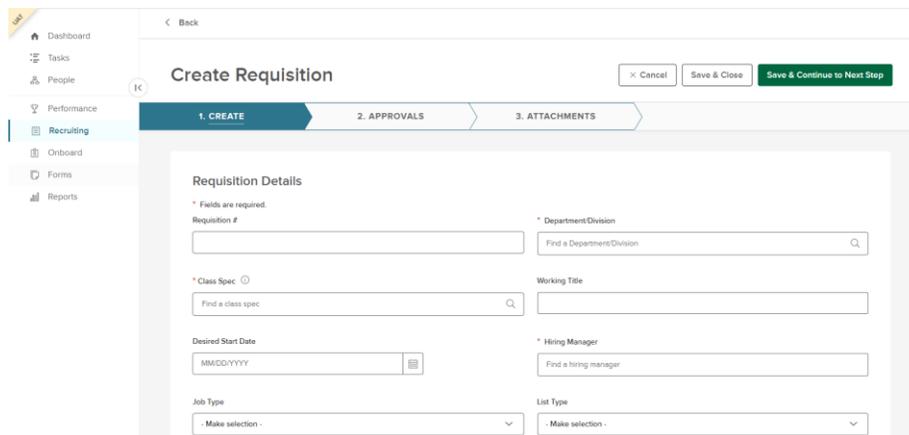
1. When a hiring department has an open position, they will submit a requisition as a request to fill the vacancy.
2. From the **Unified Dashboard** use the **Quick Actions** and click on **View My Requisition**.



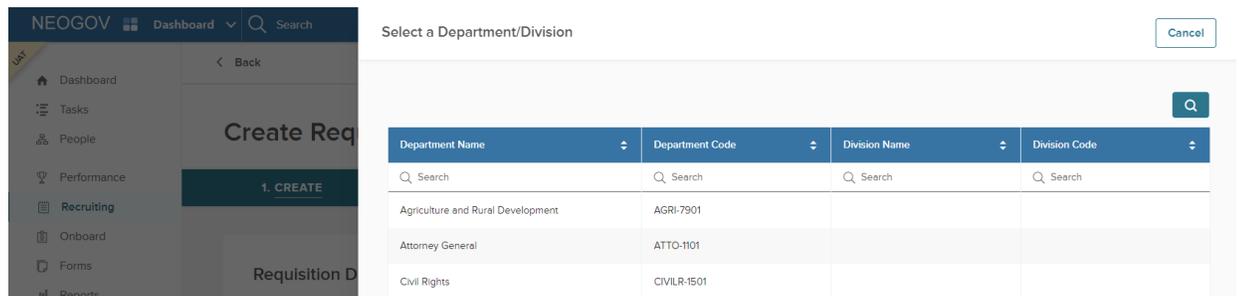
### 3. Select Create a Requisition



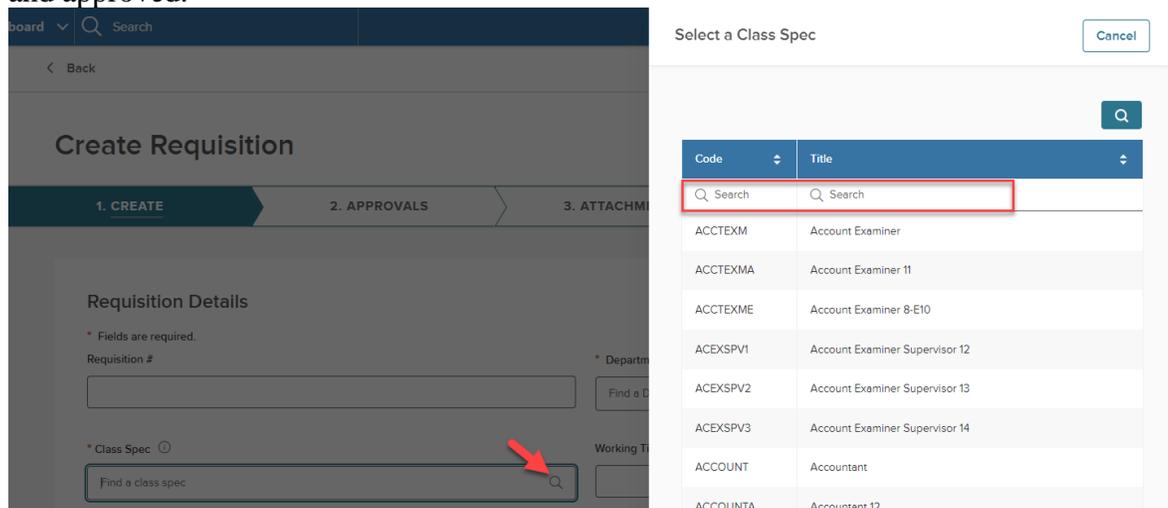
### 4. The first of three requisition form pages will display.



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.

The screenshot shows a portion of a web form. On the left, there is a search box for 'Class Spec' with a red warning icon and the text 'Field is required'. Below it is a date field for 'Desired Start Date' with a calendar icon. On the right, there is a text input field for 'Working Title' with a red box around it. Below that is a search box for 'Hiring Manager' with 'carter' entered and a red box around it. A dropdown menu is open below the search box, showing 'ANTHONY CARTER' as a result.

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).

The screenshot shows a dropdown menu for 'Job Type'. The menu is open, showing a search box at the top and a list of options below: 'Examination Only', 'Internship - Non Paid', 'Limited Term (position has expiration date)', and 'Non Career'.

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.

List Type

- Make selection -
^

- Make selection -

- Regular
- Promotional Only
- Departmental Promotional Only
- Regular and Promotional

17. Select an **Action Type**.

18. Fill in the remaining optional fields if applicable.

<p><b>Action Type</b></p> <p><input type="radio"/> Approval to Fill</p> <p><input type="radio"/> Establish &amp; Fill</p> <p><input type="radio"/> Reclassification</p> <p><input type="radio"/> Working Out Of Class</p> <p><input type="radio"/> Special Step Increase</p> <p><input type="radio"/> Other</p>	<p><b>Number of Vacancies</b></p> <p><input style="width: 100%;" type="text" value="0"/></p>
<p><b>Budget/Finance Section Two</b></p> <p><input type="radio"/> The net annual budgetary cost of the associated organizational change is less than 250k. Skip Section Three.</p> <p><input type="radio"/> The net annual budgetary cost of the associated organizational change is greater than 250k, and we have attached approval from the State Budget Office. Continue to Section Three.</p>	<p><b>Budget/Finance Section One (For Establish &amp; Fill Actions)</b></p> <p><input type="radio"/> This requisition is part of an organizational change that has NO net budgetary cost. Skip Sections Two and Three.</p> <p><input type="radio"/> This requisition is part of an organizational change that HAS a net budgetary cost but the agency has the ability to and will absorb the costs within its existing budget. Continue to Section Two.</p>
<p><b>SIGMA Home Unit</b></p> <p><input style="width: 100%;" type="text"/></p>	<p><b>Budget/Finance Section Three (Net Budgetary Cost of Associated Organizational Change)</b></p> <p><input style="width: 100%;" type="text" value="\$"/></p>
<p><b>Employee ID</b></p> <p><input style="width: 100%;" type="text"/></p>	<p><b>Employee Name</b></p> <p><input style="width: 100%;" type="text"/></p> <p><b>WOC Start Date</b></p> <p><input style="width: 100%;" type="text"/></p>

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.

⊕ Add Position Detail

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

## Position Details

New Position?

Yes  No

\* Position # △ Field is required

\* Vacancy Date

MM/DD/YYYY

\* First Name

\* Last Name

Delete

+ Add Position Detail

21. **Comment Section** is optional.

Comment

Comments 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 Requisition

X Cancel Save & Close **Save & Continue to Next Step**

1. CREATE 2. APPROVALS 3. ATTACHMENTS

Requisition Details

\* Fields are required.

Requisition #

Enter Req Info Here!

\* Department/Division

Agriculture and Rural Development

\* Class Spec

Behavior Analyst (2,000/4/16)

Working Title

Desired Start Date

MM/DD/YYYY

\* Hiring Manager

ANTHONY CARTER Find a hiring manager

Job Type

Permanent Full Time

List Type

Regular

## Create Approvals

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

Create Requisition

X Cancel Save & Close **Save & Continue to Next Step**

1. CREATE 2. APPROVALS 3. ATTACHMENTS

Approval Workflow

\* Fields are required.

+ Add Approval Group

2. Select **Add Approval Group.**

**Create Requisition** [Cancel] [Save & Close] [Save & Continue to Next Step]

1. CREATE ✓ 2. APPROVALS ✓ 3. ATTACHMENTS ✓

**Approval Workflow**  
\* Fields are required.

[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.

**Create Requisition** [Cancel] [Save & Close] [Save & Continue to Next Step]

1. CREATE ✓ 2. APPROVALS ✓ 3. ATTACHMENTS ✓

**Approval Workflow**  
\* Fields are required.

\* Approval Group  
DHHS - HR Transactions [dropdown arrow]

\* Due Date  
MM/DD/YYYY

\* Approvers  
Field is required  
Search Approvers [Search icon]

[Add Approval Step] [Cancel]

**Select Approvers** [Cancel] [Done]

Name [dropdown arrow]

Search

JOANN GALLAGHER

Previous 1 Next Last 10 Items per page  
Showing 1 of 1 items

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

**Create Requisition** [Cancel] [Save & Close] [Save & Continue to Next Step]

1. CREATE ✓ 2. APPROVALS ✓ 3. ATTACHMENTS ✓

**Approval Workflow**  
\* Fields are required.

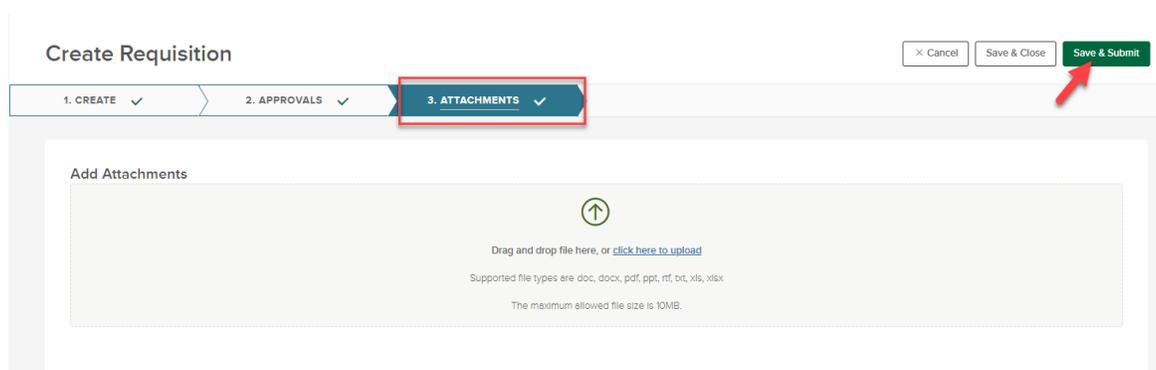
1	DHHS - HR Transactions	Approvers JOANN GALLAGHER	Status	Due Date 04/19/2024	Comments	[edit]
2	MCSC - Compensation	Approvers MCSC Compensation	Status	Due Date	Comments	[edit]

[Add Approval Group]

## 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.

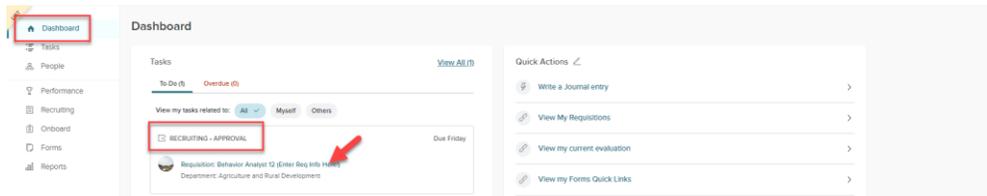
*In the example below, the defined approval path requires the requisition to travel through a total of four approval groups before going to HR.*

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.

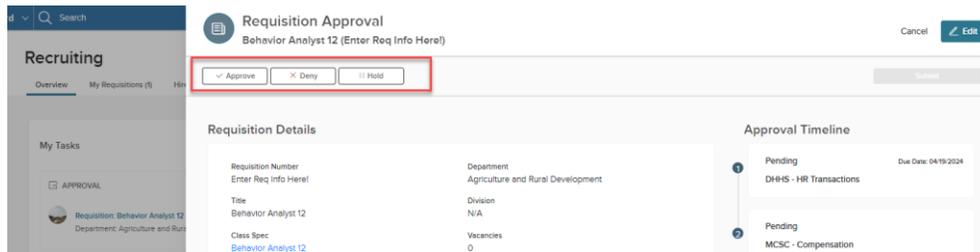
Approval Group	Selected Approver(s)
Group 1: Manager	Simon Davies and Melanie Scott
Group 2: Director	Joyce Lowe and Mark Campbell
Group 3: Budget	Nancy Reed
Group 4: President	Drake Thomas

## 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

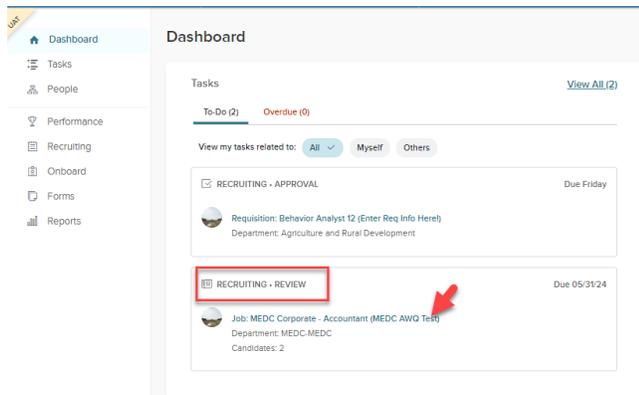
With the OHC role of SME, you can complete a SME review. SME reviews are used when HR enlists the expertise of their organization's subject matter experts (SMEs) to assist with the candidate selection process.

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

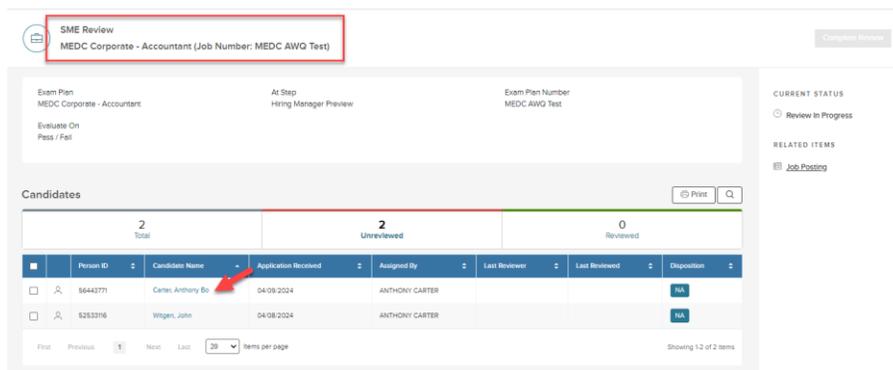


## Steps to Complete a SME Review

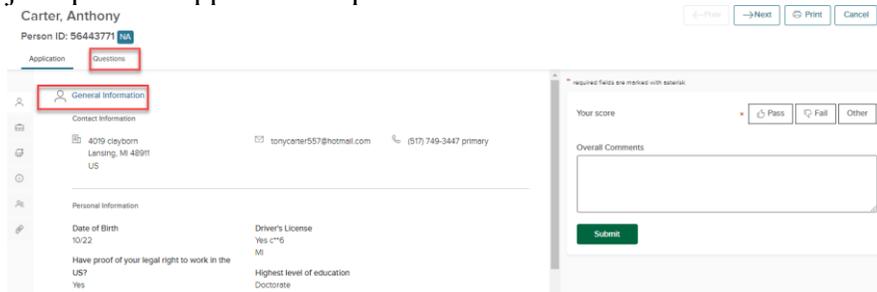
1. Click on **Tasks** from the Unified Dashboard to find your tasks associated with the recruitment process (under the **Recruiting Review** category).
2. From the **My Tasks** section, select the job for which a SME review should be completed.



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.



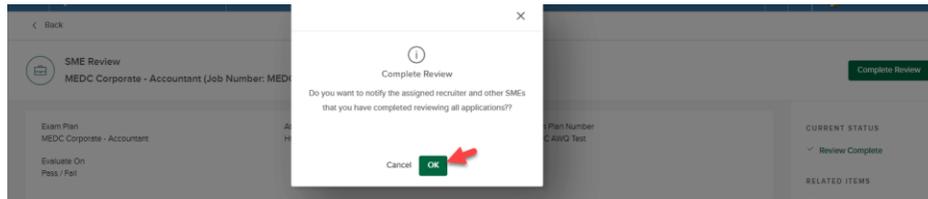
7. Review the information and select **Pass**, **Fail**, or **Other** and enter **Overall Comments**.
8. Select **Submit**.

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.

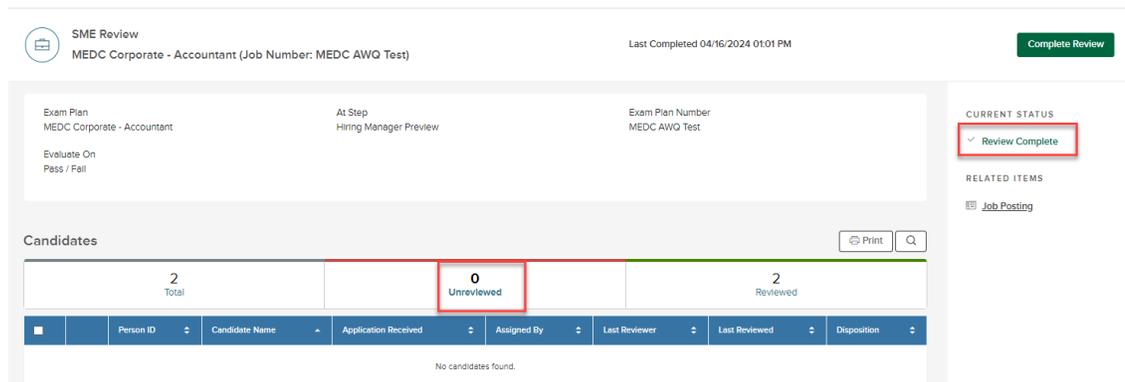
12. Once the review is complete select the **Complete Review** button.

Person ID	Candidate Name	Application Received	Assigned By	Last Reviewer	Last Reviewed	Disposition
No candidates found.						

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



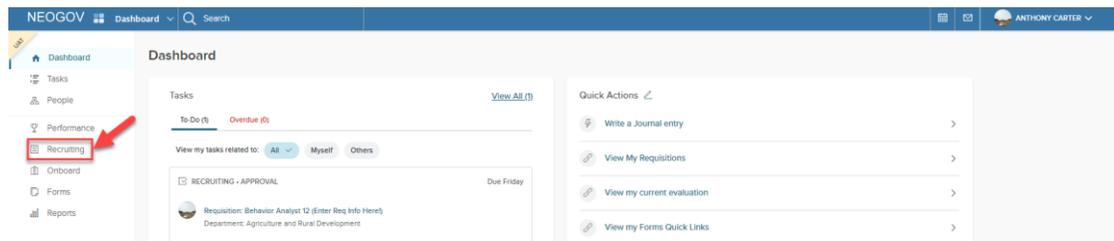
14. Notice, there are no unreviewed candidates, and the SME review status is complete.



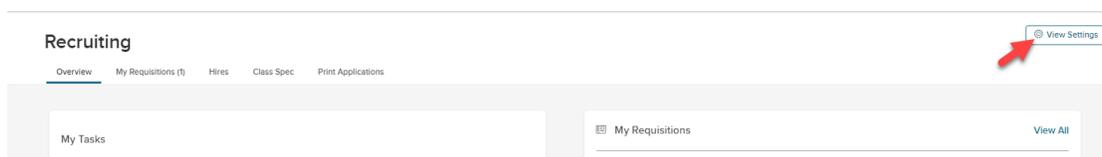
## Notice Templates (Applies to specific security roles)

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.

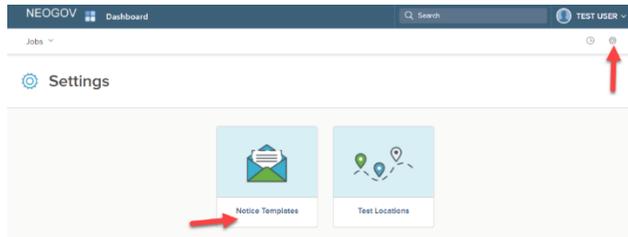
1. On the NEOGOV Dashboard, click **Recruiting** from the left navigation.



2. Click **View Settings**.



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

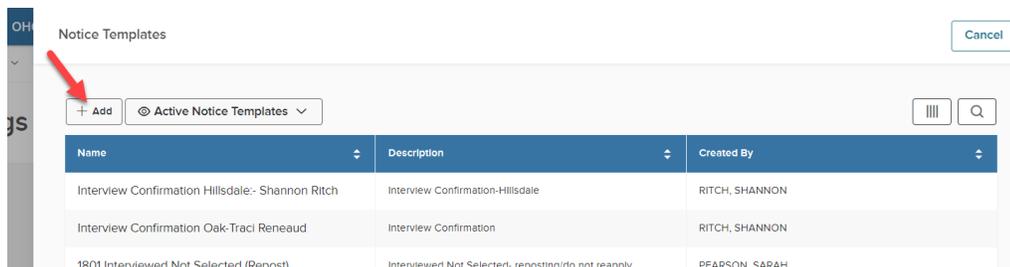


4. Click on the **+ icon**.



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**.

Create Notice Template Cancel **Save & Continue to Next Step**

**1. GENERAL** 2. COMPOSE NOTICE

General Information  
\* required fields are marked with asterisk

\* Name:  Inactivation Reason:

Description:  Departments:  

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**.

Create Notice Template Cancel **Save & Close**

1. GENERAL  2. COMPOSE NOTICE

Compose Notice

APPLICANT

USER

User First Name	User Last Name
User Phone	User Email
User Title	

AGENCY

POSITION

Position Title	Department Name
----------------	-----------------

Using the boxes on the left, you can pull in your merge fields

Drag and drop files here

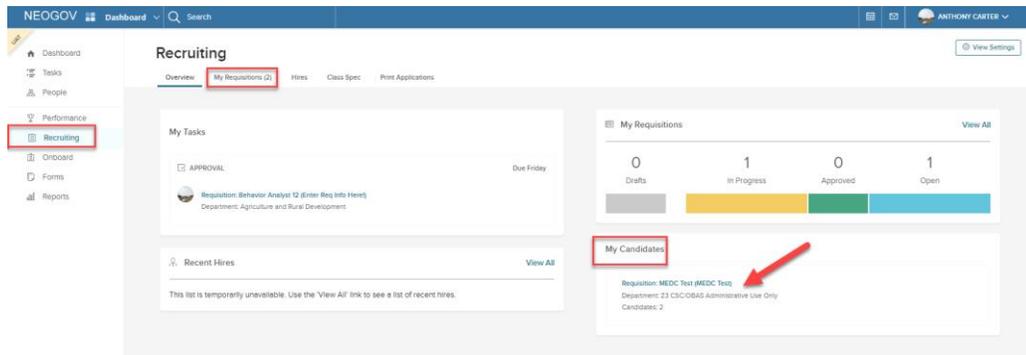
Drag and drop your file here, or browse

Hello <Applicant\_FirstName> <Applicant\_LastName>  
 Thank you for submitting your application for the position of <Position\_Title> with our <Position\_Department>  
 Great news! You've been selected to attend a Skype interview with our hiring department staff.  
 Interview date <ReferedInterview\_DateInterviewStart>  
 Interview time <ReferedInterview\_TimeInterviewStart>  
 Interview and time <ReferedInterview\_TimeInterviewEnd>  
 We look forward to speaking with you soon!

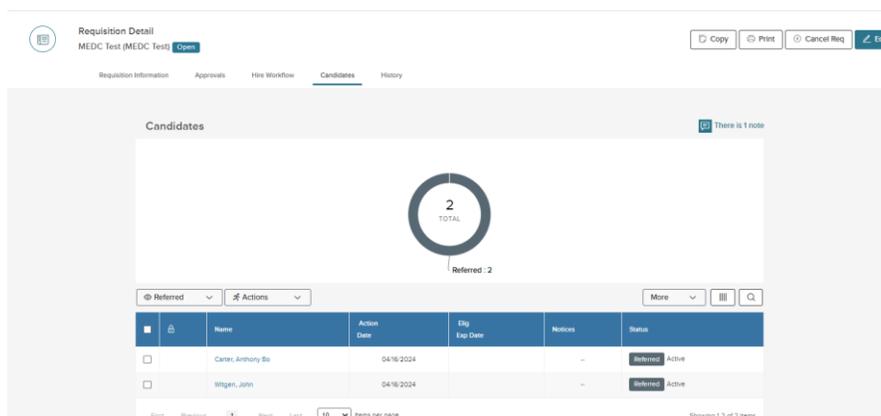
## Schedule Interviews

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

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.



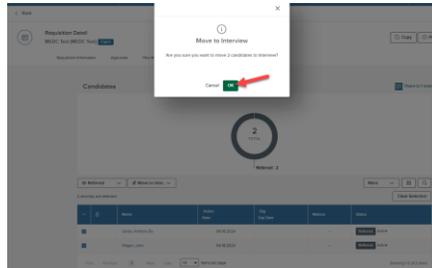
3. Select the candidate(s) that will be moved to the interview step.



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



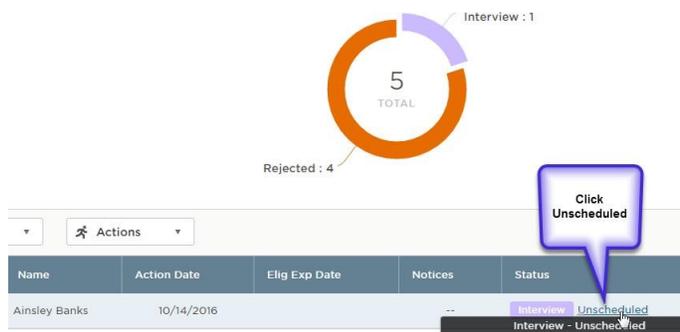
- Click **OK** to confirm moving the candidates.



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



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



- 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.

**Schedule Interview**  
Ainsley Banks (Person ID: 16711522)

**Interview Details**

Interview Date \* 10/14/2016

Location MCSC Lansing-MDOC

Time 11:00 AM to 12:00 PM Eastern Time (US & Canada)

Interviewer BRANDI WITGEN

< October 14, 2016 > Today Month Week Day

10. The status column now shows the interview information.

Requisition Detail  
MEDC Test (MEDC Test) [Open](#)

Copy Print Cancel Req Edit

Requisition Information Approvals Hire Workflow **Candidates** History

Candidates There is 1 note

2 TOTAL  
Interview: 2

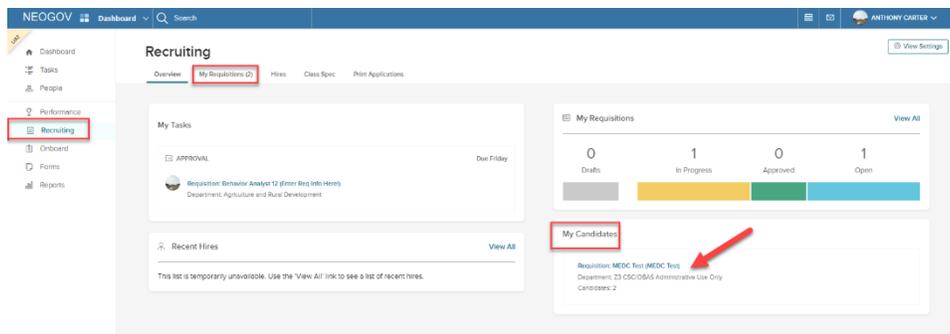
	Name	Action Date	Exp. Date	Notices	Status	Offer
<input type="checkbox"/>	Carter, Anthony Bo	04/16/2024		--	Interview Scheduled for 04/16/2024, 2:00 PM	
<input type="checkbox"/>	Witgen, John	04/16/2024		--	Interview Scheduled for 04/16/2024, 1:55 PM	

Showing 1 of 2 items

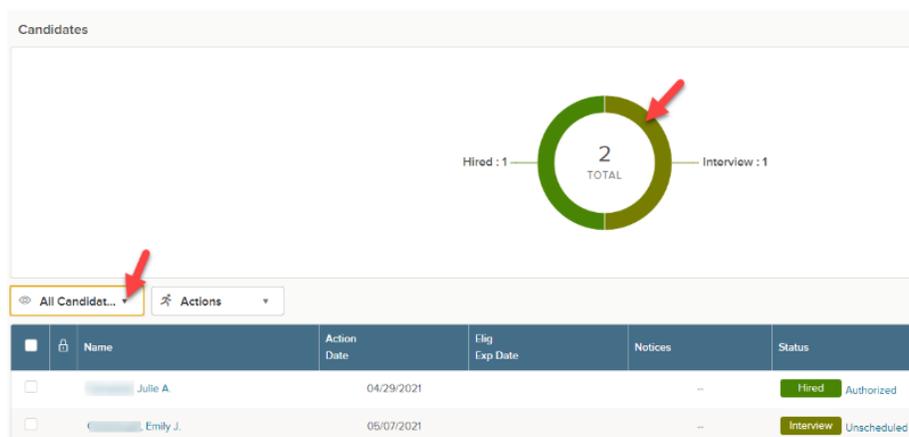
## Send Notices

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

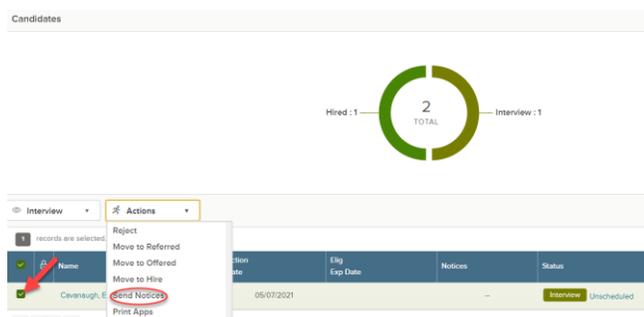
1. If you are not already viewing the referred list of candidates, select **View My Requisitions** in the **Quick Actions** section of your dashboard.
2. In the following image, go to the **My Candidates** section and select the link in the right column.



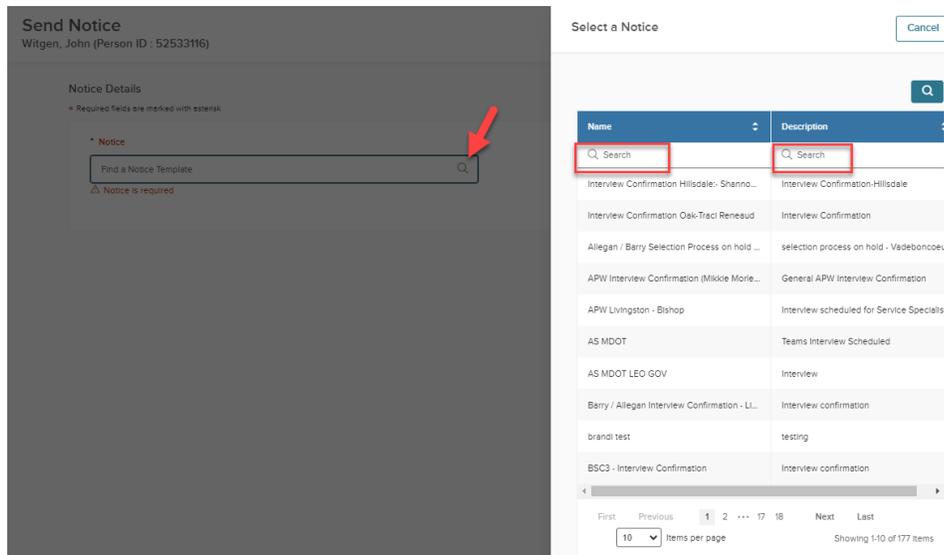
3. You are now viewing the referred list. On the **Candidates** menu, click the doughnut chart or on the **All Candidates** drop-down to send notification.



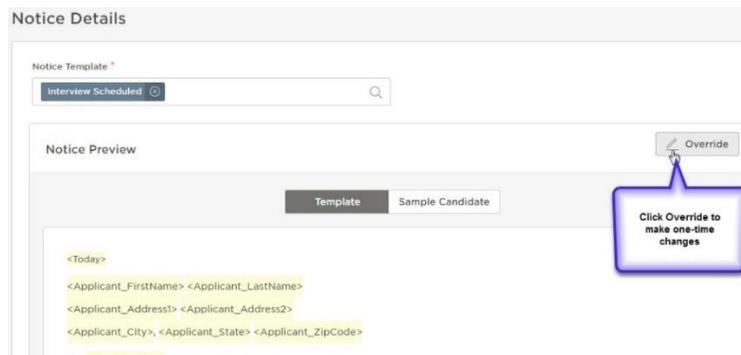
4. Select the candidates to receive notices by checking the box next to their name.
5. On the **Actions** menu, click **Send Notices**.



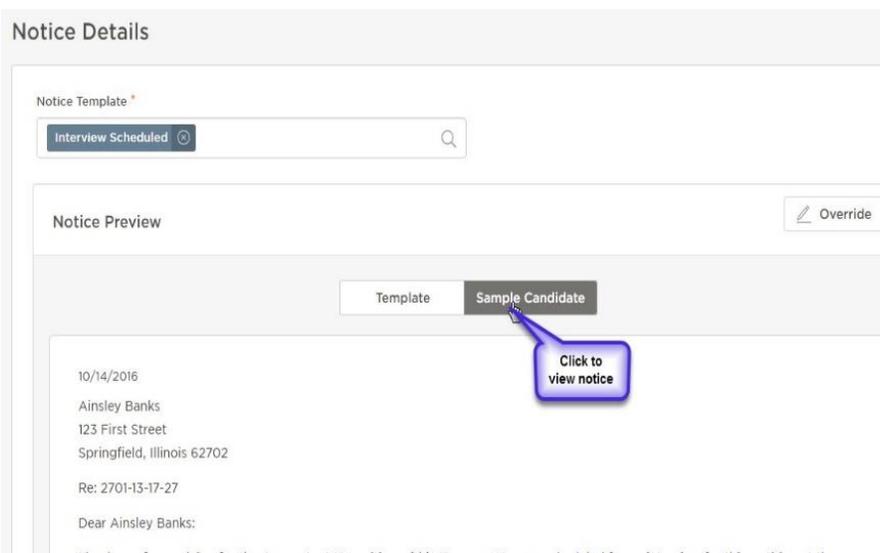
6. Search the notice template field.
7. Select a notice template.



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](mailto:MCSC-NEOGOV@michigan.gov).