## Table of Contents

Introduction ................................................................................................................ 4

**Module 1: Create a requisition** ...................................................................................... 6  
Steps to create a requisition .......................................................................................... 7  
Steps to approve a requisition ..................................................................................... 11  
Steps to reassign a requisition’s creator/owner ............................................................. 14  
Steps to modify an approval workflow ........................................................................ 15  
Steps to set up a notice template .................................................................................. 16

**Module 2: Authorize a requisition and create an exam plan** ..................................... 18  
Steps to authorize a requisition ................................................................................... 18  
Steps to create an exam plan ....................................................................................... 20

**Module 3: Create a minimum qualifications evaluation step** .................................... 24  
Steps to create a minimum qualifications evaluation step ........................................... 24

**Module 4: Create a job posting** .................................................................................. 26  
Steps to create a job posting ....................................................................................... 26

**Module 5: Create job-specific supplemental questions** ........................................... 35  
Steps to create job-specific supplemental questions ................................................... 35  
Steps to publishing the job posting on the web .............................................................. 42

**Module 6: Submit an online application** .................................................................... 45  
Steps to submit an online application ......................................................................... 45

**Module 7: Submit a paper application** .................................................................... 54  
Steps to submit paper application ............................................................................. 54

**Module 8: Evaluate candidates and send notices** .................................................... 56  
Steps to evaluate candidates ....................................................................................... 56  
Steps to archive duplicate applicants ......................................................................... 60  
Steps to send notices .................................................................................................... 61

**Module 9: Place candidates on an eligible list** ......................................................... 62  
Steps to place candidates on an eligible list ............................................................... 62

**Module 10: Create a referred list** ............................................................................ 66  
Steps to create a referred list ...................................................................................... 66

**Module 11: Complete interview and hiring tasks** .................................................... 70  
Steps to schedule interviews ....................................................................................... 70  
Steps to send notices .................................................................................................... 72  
Steps to reject a candidate ............................................................................................ 75  
Steps to reject a candidate in bulk .............................................................................. 77  
Step to hire a candidate ................................................................................................. 79

Step to approve a hire..................................................................................................... 83

**Module 12: Authorize a new hire and fill a requisition** .......................................... 84  
Steps to authorize a new hire and fill a requisition ....................................................... 84

**Module 13: Archiving** ............................................................................................... 86  
Steps to archive a job posting ...................................................................................... 86  
Steps to archive a referral list ....................................................................................... 86  
Steps to archive an eligible list .................................................................................... 87  
Steps to archive an exam plan ..................................................................................... 88
Appendix

What’s changing beginning go-live on April 17th? .......................................................... 89
Create a posting for senior level candidates and hires from a civil service list ..................... 91
Screenshots for senior level candidates/civil service hire postings ...................................... 92
   Exam plan ......................................................................................................................... 92
   Posting .............................................................................................................................. 92
   Posting overview ............................................................................................................. 94
   Evaluation step ............................................................................................................... 94
   Eligible lists .................................................................................................................... 95
Printed job posting bulletin .................................................................................................. 96
Dual postings with one posting .......................................................................................... 97
Dual postings with more than one posting .......................................................................... 97
Paper bid forms .................................................................................................................. 98
Seniority postings ............................................................................................................ 98
   Posted ............................................................................................................................. 99
   Not posted ....................................................................................................................... 99
Hires from a civil service list ............................................................................................... 100
Senior level hires .............................................................................................................. 101
   Request to post a senior level job .................................................................................. 101
   No posting for senior level external candidate ........................................................... 102
   No posting for senior level internal candidate ............................................................ 102
NCS management internal hires (no posting) ..................................................................... 103
Annuitant Hires (no posting) ............................................................................................ 103
Internal/external simultaneous postings ............................................................................. 104
Copy a posting .................................................................................................................... 104
Moving a requisition to BTAP to post externally after posting internally .............................. 105
Supplemental questions ..................................................................................................... 106
Hire form ............................................................................................................................ 106
Searching archived postings ............................................................................................. 106
Rejection reasons ............................................................................................................... 107
Fair chance hiring ............................................................................................................. 108
Attaching documents ........................................................................................................ 109
Introduction

Welcome to new user training for Insight! This guide is designed to complement the 13 modules from the NEOGOV Community. You’ll walk through the training tutorials, step by step, from opening a requisition to hiring the ideal applicant.

![Diagram of training module flow]

The single sign-on link to access NEOGOV is:

https://login.neogov.com/Signin?siteCode=IN
Before starting the requisition process, you should be aware of the following:

1. When creating a requisition, whenever possible assign a specific position to it so that the information pre-populates later in the process in the Hire Form. This allows for metrics reporting. If you don’t do this and want to have accurate metrics, you will have to start the requisition over from the beginning.

2. Once a requisition and exam plan number have been generated (they will be the same number), write them down because you will need them when it’s time to complete the Make a Hire process.

3. When an HR staff member is going to be out of the office they should reassign any job postings they’re working on to another staff member so that someone has access to the posting and exam plan. In the case of an unexpected absence, the HR office should contact BTAP to reassign the job posting.
Module 1: Create a Requisition

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

There are three methods to start up the process of creating a requisition:

Method 1

On the [+ ] menu, click Requisition from any page.

Method 2

On the Jobs menu, click Requisitions.

Then click Add.
Method 3

From the My Requisitions section on your dashboard, click VIEW ALL.

Then click Add.

Steps to Create a Requisition

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

*Please Note:
The requisition form will have a radio button to differentiate between internal and external postings.

Internal = recruiting for current commonwealth employees (including agency specific)

External = recruiting for non-commonwealth employees

2. Complete the requisition form page and click Save & Continue to Next Step.

*Please Note:
If creating a requisition for a senior level position, you must select your agency’s SL department code. E.g. 81SL.
3. Populate the Create Requisition form using the fields grid below.

**The fields:** (* Required field)

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition #</td>
<td>Will be automatically assigned when the requisition is saved.</td>
</tr>
<tr>
<td>*Department/Division</td>
<td>Select your agency/division combination from the search.</td>
</tr>
<tr>
<td>*Class Spec</td>
<td>Select the appropriate class spec from the search.</td>
</tr>
<tr>
<td>Working Title</td>
<td>This will pre-populate upon selection of a position. This will be prefaced by a 4-digit organization code and a county code after saving.</td>
</tr>
<tr>
<td>Desired Start Date</td>
<td>Enter desired start date.</td>
</tr>
<tr>
<td>*Hiring Manager</td>
<td>Select a Hiring Manager from the search.</td>
</tr>
<tr>
<td>Job Type</td>
<td>Select a Job Type from the drop-down</td>
</tr>
<tr>
<td>List Type</td>
<td>Leave this field blank.</td>
</tr>
<tr>
<td>Number of Vacancies</td>
<td>Enter the number of vacancies.</td>
</tr>
<tr>
<td>Position</td>
<td>Select the position number(s).</td>
</tr>
<tr>
<td>Pos Desc URL</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>TypeSvc</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Pay Group</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Pay Scale</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Salary</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Hourly</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>End Date</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Org Name</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Org Address 1</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Org Address 2</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Org City</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Org Zip</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Dept. Control No</td>
<td>Leave this field blank.</td>
</tr>
<tr>
<td>Location</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Vacancies Filled</td>
<td>Leave this field blank.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Enter contact name.</td>
</tr>
<tr>
<td>Contact Phone</td>
<td>Enter contact phone number.</td>
</tr>
<tr>
<td>Contact Email</td>
<td>Enter contact email.</td>
</tr>
<tr>
<td>Barg Unit</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>Dept. Code</td>
<td>This field will pre-populate based upon selection of a position.</td>
</tr>
<tr>
<td>New Position</td>
<td>Select if the position is a new position.</td>
</tr>
<tr>
<td>Add Position Detail</td>
<td>Enter Position Number (required), Vacancy Date, First Name, Last Name.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter comments regarding the requisition.</td>
</tr>
</tbody>
</table>

**Please Note:**
For fields that pre-populate based upon selection of a position – if a position is not selected, these fields must be entered manually.

**Please Note:**
In the comments section of the requisition, for NCS External postings, agencies should indicate their preference for a referral list from one of three options: all applicants, all qualified applicants, or top tier of qualified applicants.

**Please Note:**
If requesting a civil service list, comments should be added for how the list should be pulled (E.g. state-wide, county, region, contiguous counties). There will be a field to indicate this in the future when SCSC exam lists are in NEOGOV.
4. If you have an approval workflow template, it will display on the second requisition form page. In the event of a special circumstance that requires changes, click the edit pencil icon and complete your updates. Any changes will only be applied to this requisition, not the saved approval workflow template.

5. To delete an approval step, click the trash can icon next to the step you want to delete.

6. To add an approval step, click the Add Approval Group button located below the approval steps.

7. Select an approval group from the Approval Group drop-down and choose an approver from your list of approvers. Click Add Approval Step to add your approver.

*Please Note: Users must be added as a hiring manager on the requisition to have access to the referred list.*
8. Click Save & Continue to Next Step.

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

![Create Requisition](image)

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

## Approve a Requisition

The selections of approve, deny and on hold are available. The cancel selection is not available for approvers. A requisition must be cancelled by the person that created it or someone with the role of HR Liaison. Additionally, if a requisition has been approved, it can be cancelled by an HR staff member with Insight access.

**Please Note:**
If undertaking a dual, triple, or quad posting, the initial requisition will be created and approved in OHC. Additional requisitions can be created by HR in Insight (this step bypassed workflow). The ratio is 1 exam plan to 1 posting so if you want multiple postings, you must use multiple exam plans. You may attach multiple requisitions to one exam plan.
Requisition Approval Path Example

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

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

<table>
<thead>
<tr>
<th>Approval Group</th>
<th>Selected Approver(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1: Supervisor/Manager</td>
<td>Simon Davies and Melanie Scott</td>
</tr>
<tr>
<td>Group 2: HR Classification</td>
<td>Maria Ramirez and Gretchen Case</td>
</tr>
<tr>
<td>Group 3: Budget</td>
<td>Joyce Lowe and Mark Campbell</td>
</tr>
<tr>
<td>Group 4: Executive</td>
<td>Nancy Reed</td>
</tr>
<tr>
<td>Group 5: Human Resources</td>
<td>Vindi Kalkote and Margaret Wheeler</td>
</tr>
<tr>
<td>Group 6: BTAP Furlough Check</td>
<td>BTAP Staff</td>
</tr>
</tbody>
</table>

*Please Note:*
While multiple users can be added as approvers in each group, the opportunity to take action in each approval group is on a first come, first serve basis.

Steps to Approve a Requisition

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

2. From the My Tasks section, click the requisition pending your review, click Edit, make any changes, and click Save & Close.
3. You can view the Job Specification details by clicking on the name of the Job Spec.

*Please Note:*
BTAP staff may add an “I” or an “E” before the org code in the Working Title field; they will do this by editing the requisition during the approval process. This distinguishes, for their purposes, if the candidate is internal or external. Civil Service Management positions will always be prefaced with an “I.” These indications will be deleted on the actual job posting.

*Please Note:*
HR will still be requesting Civil Service candidate lists in the AS400 system.

4. Click Approve, type any comments, and click Submit.
Approvers approving a requisition or hire action can view and download attachments from the Hire Approval screen.

*Please Note:
If a requisition is put on hold or denied, the originator of the requisition will receive an email notification.

*Please Note:
BTAP will indicate in the comment if there are no furloughees and will include their initials.

Steps to Reassign a Requisition's Creator/Owner
You can reassign one or more requisitions to a different owner using a bulk action on the requisition page in OHC.

1. From your OHC Dashboard, scroll down to the My Requisitions section.
2. Click on View All.
3. Select one or more requisitions that you would like to change the creator/owner.
4. Click on the Actions button and then click on Update Owner.

5. Use the New Owner box to search for the user you’d like to reassign the requisition to.

6. Click Save. You will receive a message confirming the reassignment. Click Yes, Update.

**Steps to Modify an Approval Workflow**
1. If you have an approval workflow template, it will display on the second requisition form page. In the event of a special circumstance that requires changes, click the edit pencil.

![Approval Workflow Diagram]

The updates can be easily completed with a drag and drop operation. You can also edit or delete the approvers here. Any changes will only be applied to this requisition, not the saved approval workflow template.

*Please Note: Agencies have chosen their workflow process and should attempt to use that set process as much as possible for both consistency and reporting purposes. Stress to non-HR hiring managers & approvers not to alter your set workflow.*

2. Click Save & Continue to Next Step.

**Set up a Notice Template**

15
Notice templates can be created for your assigned department(s)/division(s). They can be used for a variety of notice types including interview scheduling, assessment results, candidate rejection and job offer.

**Steps to Set up a Notice Template**

1. On the Set-up menu, click Notice Templates.

2. Click Add.

3. The first of two notice template pages will display.

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

5. Type the contents of your notice template. When a merge field is required, locate it using

*Please Note: Supervisors can only send notice templates. They cannot create them.*
left- side search and then drag to the proper area of the notice. Also, drag any applicable files to the attachments section.

Custom Form Fields on the Requisition, Applicant Master Profile, and Hire Form are available as merge fields when creating Notice Templates.

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

**Module 2: Authorize a requisition and create an exam plan**
Click Insight on the NEOGOV product menu.

**Steps to authorize a requisition**

1. Insight users configured to receive requisition notifications are notified, via email, about the new requisition. This notification serves as an action trigger to click Requisitions on the Jobs menu.

2. The first view displays all requisitions with a status of approved. In other words, they have either been approved by all groups or no approval path defined and now they’re awaiting HR authorization. Locate your recently created requisition and click the Authorize icon (paint brush) from the Action column.

*Please Note:*
The best way to locate your requisition is to first sort by “Approved” in the Status column, then search by job title.

3. Change Status from Approved to Open and select your name from the Analyst pull-down. Do not select an exam plan from the Existing Exam Plan. This field is only used if you’re
retrofitting a requisition to a previously-created exam plan or if a requisition is created for the same job where a current list of eligible applicants can be referred to the hiring department without the need of starting a new recruitment.

![Image of requisition form]

*Please Note:* Agencies must have an exam plan template. This template can continue to be used for future requisitions.

4. Click Save and then return to the My HR page. You have one of two ways: click NEOGOV, or click My HR on the Profile menu.

![Image of NEOGOV and My HR options]

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

![Image of approved requisitions]

**Steps to create an exam plan**

1. Click Create Exam from the Exam column.
2. The exam plan form will display.
3. Populate the exam plan form using the fields grid below.

The fields: (*) Required field

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Department</td>
<td>Pre-populates with the department specified in the requisition.</td>
</tr>
<tr>
<td>Division</td>
<td>Pre-populates with the division specified in the requisition. Note: Your Insight Administrator may not have divisions set up. This will not impact new user training.</td>
</tr>
<tr>
<td>* Class Spec</td>
<td>Pre-populates with the class spec specified in the requisition.</td>
</tr>
<tr>
<td>* Job Title</td>
<td>Pre-populates with the working job title specified in the requisition.</td>
</tr>
<tr>
<td>Exam Number</td>
<td>Pre-populates with the same number assigned to the requisition.</td>
</tr>
<tr>
<td>Vacancies</td>
<td>Pre-populates with the same number of designated in the requisition.</td>
</tr>
<tr>
<td>* Exam Type</td>
<td>Select the exam type from the pulldown. This is a NEOGOV-specific listing and the selections cannot be modified. It is recommended that this be set to Open.</td>
</tr>
<tr>
<td>* Job Type</td>
<td>Select the job type from the pulldown. This listing is set up by your Insight Administrator. This should match what was selected on the requisition.</td>
</tr>
<tr>
<td>Auto-Refer to Hiring Manager</td>
<td>Leave the default value of No as you will be evaluating applicants using Job Line</td>
</tr>
<tr>
<td>Print Bulletins</td>
<td>This field is for tracking purposes only. Select whether you’re printing job bulletins.</td>
</tr>
<tr>
<td>Number of Bulletins</td>
<td>This field is for tracking purposes only. If you’re printing job bulletins you track the number and whether they are fold-out.</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter any additional information about the exam plan in this field.</td>
</tr>
<tr>
<td>* Date Created</td>
<td>Enter the date you’re creating the exam plan.</td>
</tr>
<tr>
<td>Operator Initials</td>
<td>Enter your initials.</td>
</tr>
<tr>
<td>Dept. Code</td>
<td>Enter your agency number.</td>
</tr>
</tbody>
</table>

4. Click Save when you’re done.
What is an exam plan?

An exam plan is a central hub for many recruitment processing activities. From the exam plan you can track recruitment activities and view associated records. It may help to think of the exam plan as a recruitment folder. Your recruitment work is stored within this folder. See the sections grid on the following page for more details.

*Please Note:
Your requisition # will be the current year plus the 5-digit job code.
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Posting</td>
<td>Add a job posting from this section. Once the job posting has been added, you can view, edit, archive/unarchive, and view the audit trail.</td>
</tr>
<tr>
<td>Recruiting Plan</td>
<td>Track advertising expenditures from this section. Once an advertising item has been added, you can edit, delete, and view the audit trail. Your Insight administrator will set up the most commonly used advertising methods, e.g., newspaper ad, radio ad, CareerBuilder.</td>
</tr>
<tr>
<td>Evaluation Steps</td>
<td>Add one or multiple selection hurdles for your applicants from this section. Once an evaluation step has been added, you can edit, delete, and view the audit trail. Once applicants have applied, you can view submitted applications, print applications and view applicant results and flow reports. This is where you’ll spend much of your application screening/scoring time.</td>
</tr>
<tr>
<td>Advanced Filters</td>
<td>Add evaluation and/or eligible list filters to find specific groups of applicants from this section. Filters can be based on various data points including master profile, standard application, agency-wide and job-specific supplemental questions, and evaluation step results. Once a filter has been added, you can view, edit, delete and share.</td>
</tr>
<tr>
<td>Eligible Lists</td>
<td>Add subsequent eligible lists from this section. Upon creating the exam plan, Insight automatically creates an eligible list for you. This eligible list, named Default List, has a list type set to Regular. You can edit, view candidates and audit trail for the default and/or subsequent eligible lists. Applicants must go through all evaluation steps prior to being placed on the regular eligible list. Conversely, applicants can be placed on a priority eligible list at any time without the requirement of going through all evaluation steps. Some examples of priority eligible lists include: promotional, transfer and layoff. Your Insight administrator will set up the eligible list types required at your organization.</td>
</tr>
<tr>
<td>Requisitions</td>
<td>View the associated requisition(s) from this section. Since you created the exam plan from the requisition a moment ago, the requisition is automatically associated with the exam plan. Other actions include: add, edit, authorize, disassociate, and view a resulting referred list.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Add your other Insight users’ recruitment tasks recruitment from this section. Once a task has been added you can edit and delete. The task system will send automated email notifications to assignees regarding assignments, due dates, and status changes.</td>
</tr>
<tr>
<td>Notes</td>
<td>Add recruitment notes from this section. Once a note has been added you can edit, delete, and view the audit trail.</td>
</tr>
<tr>
<td>Files</td>
<td>Add (upload) files applicable to the recruitment from this section. Once a file has been upload it can be downloaded or deleted.</td>
</tr>
</tbody>
</table>
Module 3: Create a minimum qualifications evaluation step

Creating a minimum qualifications evaluation step is critical to complete prior to accepting applications as applicants will flow into this step for their initial review. Think of evaluation steps as selection hurdles. Applicants will remain at the evaluation step they fail; all passing applicants should be advanced to the subsequent step.

Steps to create a minimum qualifications evaluation step

1. If you’re not already viewing your exam plan, return. You have a couple of ways to get there: (1) click the exam number My HR page, or (2) click Exam Plans on the Jobs menu and then click the job title from the Exam Plan column.

*Please Note: The evaluation step must be created using the supplemental questionnaire style step.

This step should be done prior to the posting going live as part of an exam plan.
2. Click Add Step from the Evaluation Steps section.

3. The evaluation step form will display
4. Populate the evaluation step form using the fields grid below.

**The fields** (*Required field*)

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Step Type</td>
<td>Select Supplemental Questionnaire as the review will be based on submitted application materials including responses to supplemental questions.</td>
</tr>
<tr>
<td>Step Name</td>
<td>This will be a minimum qualifications screening, so enter Minimum Qualifications Review, or something similar.</td>
</tr>
<tr>
<td>Display Candidate Status As</td>
<td>If this step is shown, then this message will display to applicants who log back into the applicant portal to see their current application status. Leave this field blank. “Your application is under review” will show as the default.</td>
</tr>
<tr>
<td>* Please Note:</td>
<td>This will be a pass/fail step, so leave the default selection of Pass/Fail. In upcoming training modules you’ll gain experience with scored evaluation steps.</td>
</tr>
<tr>
<td>Applicant Status</td>
<td>The Display Applicant Status field should always reflect Do Not Show This Step.</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter any additional information about the evaluation step in this field.</td>
</tr>
<tr>
<td>Cumulative Score</td>
<td>Since this is a pass/fail step, cumulative score is not applicable. Leave the default selection of Do Not Show Cumulative Score.</td>
</tr>
<tr>
<td>Prerequisite Steps</td>
<td>Since this will be the first evaluation step, no steps can be deselected. You will see in subsequent evaluation steps the ability to make preceding steps optional. This allows you to skip steps or move applicants through evaluation steps out of sequence (e.g., from step 1, to step 3, to step 2).</td>
</tr>
</tbody>
</table>

5. Click Save when you’re done.

**Module 4: Create a job posting**

**Steps to create a job posting**

1. If you’re not already viewing your exam plan, return back. Again, there are a couple of ways to get there: (1) click the exam number My HR page, or (2) click Exam Plans on the Jobs menu and then click the job title from the Exam Plan column.

2. Click Add New from the Job Posting section.
3. The job posting form will display.

*Please Note: Your posting should remain in draft form.

*Please Note: The Job Title field will default to what was entered on the requisition; this should be removed and replaced with the job title you want candidates to see.
(Continuation of job posting form)

**Please Note:**
In the exam plan, assign yourself so that you always have access to the posting. If you will be out for an extended period, you may want to reassign the job posting to another analyst so they can access the posting.

**Please Note:**
In the Reapply Period (Days) field, we recommend setting this to zero (0).

This allows applicants to apply as often as they want during the posting period.

BTAP currently sets this field to 0. You can archive duplicate applications.

**Please Note:**
Description of work is where you “sell” the job if your posting to external candidates.
*(Continuation of job posting form)*

*Please Note:*
Information entered in the Contact Information (name, phone, email) is what displays to the applicant on the posting.
### (Continuation of job posting form)

<table>
<thead>
<tr>
<th>Pay Scale</th>
<th>ST09</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>S NONE</td>
</tr>
<tr>
<td>Org Name</td>
<td>HR Service Center</td>
</tr>
<tr>
<td>Org Address 1</td>
<td>400 North Street</td>
</tr>
<tr>
<td>Org Address 2</td>
<td>Keystone Building</td>
</tr>
<tr>
<td>Org City</td>
<td>Harrisburg</td>
</tr>
<tr>
<td>Org Zip</td>
<td>17112</td>
</tr>
<tr>
<td>Operator Initials</td>
<td>TU</td>
</tr>
</tbody>
</table>

**Salary Information**

**Auto-Update:**
- Automatically update salary range information from Class Specification.

**Minimum Salary:** 31.30

**Maximum Salary:** 47.54

**Per:**
- Based on 1950.00

**Show Salary Breakdown:**
- Hourly
- Daily
- Weekly
- Biweekly
- Semi-Monthly
- Monthly
- Annually

**Salary Display:**
- Check this box to show salary as

---

**Internal Notes (optional):**

**Supplemental Questions:**
- Yes
- No

---

*Please Note:
- Uncheck the auto-update box.

*Please Note:
- Ensure salary type drop-down field matches the Show Salary Breakdown check box.

If you choose Hour from drop-down, choose the Hourly checkbox.

If you select Year from drop-down, choose the Annually checkbox.

*Please Note: In the Supplemental Questions field, leave your selection as No.
4. Populate the job posting form using the fields grid below.

**The fields: (*) Required field**

<table>
<thead>
<tr>
<th>Job posting checkbox fields</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Select Draft to keep the job posting in a “work in progress” state. It is a best practice to select this field until you’ve thoroughly reviewed the job posting and are ready to post the job online. This prevents posting online with errors or without job-specific supplemental questions.</td>
</tr>
<tr>
<td>Archived</td>
<td>Select Archived at the end of the recruitment process; after you’ve hired the ideal applicant and you’re filing away records. Along with the job posting you will likely archive the exam plan, eligible list and referred list.</td>
</tr>
<tr>
<td>Accept Online Applications</td>
<td>Select Accept Online Applications to allow online applicants to submit their applications for employment.</td>
</tr>
<tr>
<td>Show Closing Date/Time</td>
<td>Select Show Closing Date/Time to display the closing date and time on the job posting. If the job is open until filled, then you may opt to deselect. This will remove the closing date and time from the job posting.</td>
</tr>
<tr>
<td>Continuous</td>
<td>Select Continuous to display the word “Continuous” for the job posting closing date and time.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Exam plan fields</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Department</td>
<td>Pre-populates with the same department assigned to the requisition and resulting exam plan.</td>
</tr>
<tr>
<td>Division</td>
<td>Pre-populates with the same division assigned to the requisition and resulting exam plan.</td>
</tr>
<tr>
<td>* Class Spec</td>
<td>Pre-populates with the class spec specified in the requisition and resulting exam plan.</td>
</tr>
<tr>
<td>* Job Title</td>
<td>Pre-populates with the job title specified in the requisition and resulting exam plan (job # and exam # are the same).</td>
</tr>
<tr>
<td>* Job Number</td>
<td>Pre-populates with the same number assigned to the requisition and resulting exam plan.</td>
</tr>
<tr>
<td>* Job Type</td>
<td>Pre-populates with Default Job Listing.</td>
</tr>
<tr>
<td>* Job List</td>
<td>You have a total of three pages on which your job posting can display: (1) Default Job Listing (external to commonwealth), (2) Promotional Jobs (internal to commonwealth) and (3) Transfer Jobs (internships).</td>
</tr>
<tr>
<td>* Exam Type</td>
<td>Pre-populates with the same exam type assigned to the exam plan. It is recommended that this be set to Open.</td>
</tr>
</tbody>
</table>

*Please Note:*
In the Job Title field, use a working title if you have one. This is what will display to candidates.

*Please Note:*
The Job List field refers to 3 pages:
1. Default Job Listing page = main external page
2. Promotional Jobs page = internal to the commonwealth
3. Transfer Jobs page = internships
<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Advertise From</td>
<td>Enter the date on which you will start to accept online applications for employment. At 12 midnight (in your time zone) on the opening day the job will post and accept online applications.</td>
</tr>
<tr>
<td>* Advertise To</td>
<td>Enter the date and time on which you will close the job and stop accepting online applications.</td>
</tr>
<tr>
<td>* Category</td>
<td>Select one or multiple job categories that accurately reflect your job posting.</td>
</tr>
<tr>
<td>* Location On Job Posting Display</td>
<td>Click [ ] and select the location for this job opening. Note: Your Insight Administrator will set up locations for your organization. You may only have one location to select.</td>
</tr>
<tr>
<td>* Application Template</td>
<td>Click [ ] and select the correct application template. Note: Your Insight administrator will set up application templates for your organization. You may only have one application template to select.</td>
</tr>
<tr>
<td>* Reapply Period (Days)</td>
<td>Enter the number of days an applicant must wait to reapply for this job posting. If you do not want applicants to reapply for this job posting, then set the number to equal the total number of days the job posting is open, or higher. E.g., if the job posting is open for 14 days, then enter 14. Note: Setting the number to 0 is recommended as this allows an applicant to reapply as many times as they’d prefer within the same day.</td>
</tr>
<tr>
<td>* Assigned To</td>
<td>Leave the default value of your name. Click [ ] and select the applicable Insight user.</td>
</tr>
</tbody>
</table>

*Please Note:*
In the Category field, it is important to select the correct job category because applicants who choose to submit a Job Alert will be notified of postings based on the category of their choice.

In the Location On Job Posting Display field, there is a home-headquartered option to select.

In the Application Template field, there are multiple application templates (see below). For senior level positions, you must always use a template that requires a resume.

![Application Templates](image-url)
<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Position</td>
<td>Manually enter position information.</td>
<td></td>
</tr>
<tr>
<td>Description of Work</td>
<td>Manually enter description of work information.</td>
<td></td>
</tr>
<tr>
<td>Required Experience, Training and Eligibility</td>
<td>Manually enter the position’s METs and other necessary eligibility requirements.</td>
<td></td>
</tr>
<tr>
<td>Examination Information</td>
<td>Do no use. This is for SCSC use only.</td>
<td></td>
</tr>
<tr>
<td>If bilingual, which language is desired?</td>
<td>This field is for internal tracking purposes only. If bilingual is desired for this job, then select the applicable language. If a language is selected it will not display on the job posting.</td>
<td></td>
</tr>
<tr>
<td>Bureau/Division Code</td>
<td>Enter Bureau/Division code.</td>
<td></td>
</tr>
<tr>
<td>Job Class Code</td>
<td>Enter Job Class code.</td>
<td></td>
</tr>
<tr>
<td>Dept. Control No</td>
<td>Leave this field blank.</td>
<td></td>
</tr>
<tr>
<td>Contact Name</td>
<td>Enter contact name.</td>
<td></td>
</tr>
<tr>
<td>Contact Phone</td>
<td>Enter contact phone number.</td>
<td></td>
</tr>
<tr>
<td>Contact Email</td>
<td>Enter contact email address.</td>
<td></td>
</tr>
<tr>
<td>Position No</td>
<td>Enter position number.</td>
<td></td>
</tr>
<tr>
<td>Pay Group</td>
<td>Enter pay group.                                                                ivariate.</td>
<td></td>
</tr>
<tr>
<td>Union</td>
<td>Enter union name.</td>
<td></td>
</tr>
<tr>
<td>Bargaining Unit</td>
<td>Enter bargaining unit.</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>Enter end date.</td>
<td></td>
</tr>
<tr>
<td>Org Name</td>
<td>Enter org name.</td>
<td></td>
</tr>
<tr>
<td>Org Address1</td>
<td>Enter org address, line 1.</td>
<td></td>
</tr>
<tr>
<td>Org Address2</td>
<td>Enter org address, line 2.</td>
<td></td>
</tr>
<tr>
<td>Org City</td>
<td>Enter or city.</td>
<td></td>
</tr>
<tr>
<td>Org Zip</td>
<td>Enter zip code.</td>
<td></td>
</tr>
<tr>
<td>Operator Initials</td>
<td>Enter your initials.</td>
<td></td>
</tr>
</tbody>
</table>

**Salary Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto-Update</td>
<td>This option will be un-checked as the default setting. No changes should be made to this field.</td>
<td></td>
</tr>
<tr>
<td>* Minimum Salary</td>
<td>Enter the minimum salary for the job.</td>
<td></td>
</tr>
<tr>
<td>Maximum Salary</td>
<td>Enter the maximum salary for the job.</td>
<td></td>
</tr>
<tr>
<td>* Per</td>
<td>Select the rate that coincides with the minimum and maximum salary Values (E.g. Hourly, year, etc.).</td>
<td></td>
</tr>
<tr>
<td>Based on “X” hours per</td>
<td>If applicable, select the correct hours per year.</td>
<td></td>
</tr>
<tr>
<td>* Show Salary Breakdown</td>
<td>Select one or multiple ways to display the salary values: Hourly, Daily, Weekly, Biweekly, Semi-Monthly, Monthly, and/or Annually. This must match the rate selected in the “Per” field.</td>
<td></td>
</tr>
<tr>
<td>Salary Display</td>
<td>If you do not want to display the salary in a dollar amount, then select this checkbox and then select from one of the following values: Depends on Qualifications, Negotiable, Not Displayed, See Position Description or Under Review.</td>
<td></td>
</tr>
</tbody>
</table>

**Remaining job posting fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Notes (optional)</td>
<td>Enter any additional information about the job posting in this field. The notes will not display to users or applicants.</td>
<td></td>
</tr>
<tr>
<td>* Supplemental Questions</td>
<td>Leave the default value of No. With this setting a preview of the job posting will display allowing for proofreading. At a later time you will have the opportunity to add job-specific supplemental questions to the job posting.</td>
<td></td>
</tr>
</tbody>
</table>
5. Click Save when you’re done.
6. A preview of the job posting will display. Click Edit should you need to correct any typing errors or formatting issues and then save your corrections.

Module 5: Create job-specific supplemental questions

These types of questions are often used to gather more specific information from applicants regarding their minimum and even desired qualifications that pertain specifically to the job opening.
Steps to create job-specific supplemental questions

1. If you’re not already viewing your job posting, return back. There are a variety of ways to get there: (1) select Draft in the Job Postings section (My HR page) and click job title, or (2) click Postings on the Jobs menu, click Draft Jobs on the status menu and click the job title, or (3) click Exam Plans on the Jobs menu and then click the job title from the Job Title column.

*Please Note: Additional training will be provided on supplemental questions and scoring at a later date.
2. Click Supplemental Questions from the job posting page.
3. From here you’re prompted to add the first job-specific supplemental question. If the question will only be used for this job posting and not for others like it in the future, you can proceed to add the question. Otherwise, you can go to the item bank where the question will be stored for upcoming job postings. Click Item Bank.

4. Click Add New Item to add your first item to the item bank. The item form will display.

*Please Note:*
There may be pre-established supplemental questions for some jobs in the item bank.

*Please Note:*
You can search for item bank questions in the search bar by job code, job title, or agency.

*Please Note:*
Leave the Question Code field blank; this will not be utilized.

*Please Note:*
This process is still being finalized; however, we want to strive for consistency amongst METs for the same job title. METs should be the same for the same job title across agencies. Desired traits can be different.
6. Populate the item form using the fields grid below.

The fields (* Required field)

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Question</td>
<td>Enter the question.</td>
</tr>
<tr>
<td>* Category</td>
<td>Select the proper job category.</td>
</tr>
<tr>
<td>* Type</td>
<td>Select the proper question type.</td>
</tr>
<tr>
<td>* Response Format</td>
<td>Depending on the question, select Text Answer, Select From Choices Answer or Yes/No Answer.</td>
</tr>
</tbody>
</table>

* Input Type

- If Response Format is set to Text Answer, then either Scrolling Text Box (a larger text field) or Text (a single line text field).
- If Response Format is set to Select From Choices Answer, then select either Radio, Drop Down Box Single, Drop Down Box Multiple, or CheckBox.
- Note: If the question is multiple choice, then use either Radio or Drown Down Box Single. If the question is multiple select, then use Drop Down Box Multiple or CheckBox.

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Response Options</td>
<td>If Response Format is set to Select From Choices Answer, then click Add Option to add a response option and then enter an abbreviation, number or letter in the Internal Code field, the description in the Response Option field, and optionally, a number in the Points field for auto-scoring setup. Repeat these steps to add additional response options.</td>
</tr>
<tr>
<td>* Required Question</td>
<td>Select Yes to prevent applicants leaving the question unanswered. Select No if answering the question is optional.</td>
</tr>
<tr>
<td>Confidential</td>
<td>Select Confidential if there should be restricted viewing of applicants’ responses; otherwise, leave the checkbox deselected. Only Insight users with access to view confidential information will see confidential questions. Users will not see confidential questions, regardless of permissions.</td>
</tr>
</tbody>
</table>

7. Repeat steps 4-6 to add additional questions.

8. Click Add from the Basket column for all questions you wish to add to your job posting.
9. This will add the questions to your basket. Click Checkout when you’re done.

10. Click Add New Question to add an additional question to your job posting that will not be stored in the item bank.

11. The question form will display.
12. Populate the question form using the fields grid below.

**The fields** (*Required field*)

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Question</td>
<td>Enter the question.</td>
</tr>
<tr>
<td>Question Code</td>
<td>Enter a code or abbreviation for the question.</td>
</tr>
<tr>
<td>* Response Format</td>
<td>Depending on the question, select Text Answer, Select From Choices Answer or Yes/No Answer.</td>
</tr>
<tr>
<td>* Input Type</td>
<td>If Response Format is set to Text Answer, then either Scrolling Text Box (a larger text field) or Text (a single line text field). If Response Format is set to Select From Choices Answer, then select either Radio, Drop Down Box Single, Drop Down Box Multiple, or CheckBox. Note: If the question is multiple choice, then use either Radio or Drop Down Box Single. If the question is multiple select, then use Drop Down Box Multiple or CheckBox.</td>
</tr>
<tr>
<td>* Response Options</td>
<td>If Response Format is set to Select From Choices Answer, then click Add Option to add a response option and then enter an abbreviation, number or letter in the Internal Code field, the description in the Response Option field, and optionally, a number in the Points field for auto-scoring setup. Repeat these steps to add additional response options.</td>
</tr>
</tbody>
</table>

**Field** | **What to enter**
--- | ---
Is the candidate required to answer the question? | Select Yes to prevent applicants leaving the question unanswered. Select No if answering the question is optional. |
Confidential Question | Leave this to the default of No. |
Employer Use Only | Leave this to the default of No. |
Allow on Panel Templates? | Leave this to the default of No. |
Panel Column Name | If Allow on Panel Templates? is set to Yes, then enter a column name; otherwise leave this field blank. |

13. Repeat steps 10-12 to add additional questions.

*Please Note:*  
For the Response Options field, the yes/no question format is not compatible with auto-scoring. To use auto-scoring you will have to choose “select choice from answer” and input yes and no answers.

For the Confidential Question and Employer Use Only fields always select no.
14. Click the up and down arrows to arrange questions in the proper order.

<table>
<thead>
<tr>
<th>Question</th>
<th>Cat. Req. Conf. Emp.</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How many years of professional-level work experience do you have as a Human Resources Analyst?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• No experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Less than 1 year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 1 year to less than 2 years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 2 years to less than 3 years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 3 or more years</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

15. When finished drafting questions, click the job number and title that displays in red text to return to the job posting edit page.

Steps to publishing the job posting on the web

1. Deselect Draft, scroll to the bottom of the page and click Save. You must take your job posting out of draft status to publish it on the web.
2. Your job posting is now published. To look at your job posting, click My Links on the Profile menu. These are shared links your Insight administrator can set up for all Insight users.

*Please Note:
Postings do not appear immediately. There may be a delay. Ensure that you are selecting the refresh button to view the posting.

3. Click the appropriate Job Opportunities Page link. This is a link to your training environment career pages.
4. The first page that displays is the job listings page. Click the job title from the Position column to view your job posting.

5. The job posting displays complete with a preview to the job-specific supplemental questions.
Module 6: Submit an online application

Steps to submit an online application

1. If you’re not already viewing your job posting from your training environment career pages, return back. Click My Links on the Profile menu.

2. Click the appropriate Job Opportunities Page link.

<table>
<thead>
<tr>
<th>COPA's Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link</td>
</tr>
<tr>
<td>NEOGOV Main Job Opportunities Page</td>
</tr>
<tr>
<td>NEOGOV Internal Job Opportunities Page</td>
</tr>
<tr>
<td>NEOGOV Internship Opportunities Page</td>
</tr>
</tbody>
</table>
3. Click the job title from the Position column to view your job posting.

4. The job posting displays. Click Apply.

5. If you’ve already created an applicant account, sign back in; otherwise, click “Create an account.”
6. Enter your email, preferred username, and password. Usernames may contain letters, numbers, and underscore characters. Passwords must be at least 8 characters in length, contain upper and lower case letters, at least one number and one special character, e.g., an exclamation mark. Once you’re done, click Create.

7. The next page that displays is the résumé import page which reduces the amount of time to set up your profile, particularly your work history and education. You have one of three options: (1) transfer from LinkedIn, (2) upload from a résumé document, or (3) if you do not have a LinkedIn account or résumé document handy, skip this step and manually enter information.
8. Populate the General Information section and click Save.

9. Populate the Personal Information section and click Save.

10. Populate the Preferences section and click Save.
11. Once you’re done, click Next to proceed to the Work Experience section.

12. Click “Add work experience,” to populate the work experience form and click Save.

13. Repeat this step for any additional experience records.
14. Once you’re done, click Next to proceed to the Education section.

15. Click Add Education, populate the education form and click Save.

16. Repeat this step for any additional education records.

17. Once you’re done, click Next to proceed to the Additional Information section.
18. The Additional Information page will display. From here you can add licenses, certifications, skills, typing/data entry speeds, languages, and any other supplemental information.

19. Once you’re done, click Next to proceed to the References section.

20. Click Add Reference, populate the references form and click Save.
21. Once you’re done, click Next to proceed to the Attachments section.

22. Click “Choose attachment type” and select Resume from the pulldown.

23. From this page use the upload page, or, drag and drop the file into the box. Click Next once you’re done to proceed to the Agency Questions and Supplemental Questions sections.

24. Populate Agency Questions and Supplemental Questions sections and click Proceed to Review.

25. Review your entries and then click Proceed to Certify and Submit.
26. Click Accept & Submit from the Certify & Submit page.

27. A confirmation page will display after submitting your application. An email with the same confirmation verbiage is sent to the applicant.

*Please Note: Applicants can bypass sections (education, work history, etc.) but they will have to initial at the end of each bypassed section acknowledging they meant to skip that section.
Module 7: Submit a paper application

If you’re submitting an application from Insight, then it’s likely you’re entering a paper-based application handed in by an applicant. This type of application is referred to as a paper application.

*Please Note:
When a paper application is received, Human Resources must manually enter the paper application into Insight. Each HR Office must designate a staff member to complete this task.

It’s important to train employees how to access the system electronically regarding submission of applications. This will avoid excess paper use and eliminate the additional time HR Staff members must use to manually enter paper applications.

Steps to submit paper application

1. Click App Entry from the Applicants menu.

2. Enter the first and last name of your applicant.
3. Move your job to the Selected Jobs box and click Submit.

4. The application form will display. Despite the red asterisks representing required fields, there are only seven mandatory fields. For expedient application entry, you can populate a minimum number of fields. Populate First Name, Last Name, Address, City, State, Zip Code, and change Notification Type to Paper.

*Please Note: Available Jobs in red font are those the applicant has already applied for.

*Please Note: If HR enters an application for an employee, change the Notification Type field from “Email” to “Paper”.
5. Once you’re done click Save & Enter Another Application.

6. Repeat steps 2-5 to add additional applications.

Module 8: Evaluate candidates and send notices

Steps to evaluate candidates

1. Return back to your exam plan. Again, you have a couple of ways to get there: (1) click the exam number My HR page, or (2) click Exam Plans on the Jobs menu and then click the job title from the Exam Plan column.
2. Click View Applicants by Step or click the name of the evaluation step to view the applicants.

3. Click the name of your first applicant.

*Please Note:
When using supplemental MET questions, you must still look at those who failed based on the METs because they may qualify based on an open equivalency combination of experience and training and therefore do meet the eligibility requirements. In this case, you would have to manually change the disposition of the failed application from failed to passed.

*Please Note:
If auto-scoring is not set up, the candidate disposition will show as N/A. This indicates that this application needs to be reviewed. Even when using auto-scoring still double-check the candidate disposition for accuracy.
4. The application will display. After reviewing the application, scroll to the top of the page and click Show Candidate Disposition.

5. The rating panel will display. To pass a candidate, click Passed from the Pass/Fail Step field and click Save & View Next App to proceed to the next applicant.
6. To fail a candidate, click Failed from the Pass/Fail Step field, select “Does not meet minimum requirements” from the Reject Reason pulldown and click Save & View Next App.

7. Pass or fail the remaining applicants until you’ve reached the bottom of the list. You’ll know when you have reached the bottom by the application count in the lower left and the Save & View Next App button no longer displays. Pass or fail your last applicant and click Save. A confirmation displays stating Disposition Updated Successfully.

8. Click View Applicants By Step to return back to your applicants.
Steps to archive duplicate applications

1. From the Exam Plan Detail Screen, Evaluation Steps section, choose View Applicants by Step

<table>
<thead>
<tr>
<th>Evaluation Steps</th>
<th>Add Step</th>
<th>View Applicants (5)</th>
<th>View Applicants by Step (3)</th>
<th>App Flow</th>
<th>Print Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step</td>
<td>Evaluation Step</td>
<td>Weight</td>
<td>Results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Step 1</td>
<td>Supplemental Questionnaire</td>
<td>N/A</td>
<td>View Results</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Review the Received column for each of the duplicate applications; you will archive the oldest application

3. Put a check mark in the box next to the name of the applicant you are archiving. Choose archive from the first drop-down list. Choose Selected from the second drop-down list. Click Go.

4. You will be asked to verify that you want to archive the application. Click archive
**Steps to send notices**

1. To send a fail notice to the applicable applicant(s), select Email Notify from the Select Action pulldown, select Failing from the Select Candidate(s) pulldown and click Go.

2. Select Failed Minimum Qualifications from the Template pulldown and click Generate Notices.

3. Click Send to simulate sending the notice(s).

*Please Note:*
You should not send notices to failed applicants at this point in the process. You will do so at the end of the hiring process.

**Trainer Note:**
Failed candidates remain at the evaluation step they failed.
4. A confirmation displays stating “Emails sent successfully.” Click View Applicants By Step to return to your applicants.

Module 9: Place candidates on an eligible list

You will place all qualified applicants on an eligible list. An eligible list is a listing of qualified applicants. From the eligible list you will refer a subset or all applicants to the hiring department. Multiple eligible lists can be maintained to sort candidates by recruitment method. E.g., promotion without exam, transfer, reassignment, etc.

Steps to place candidates on an eligible list

1. If you’re not already viewing your exam plan, return back. Click the exam number My HR page, or click Exam Plans on the Jobs menu and then click the job title from the Exam Plan column.

2. From the Eligible Lists section an eligible list entitled Default List already exists. This will be the case for any new exam plan. Click Edit to configure the eligible list’s attributes.

*Please Note:*
A default list is automatically set up for you under the Eligible Lists section.
3. The eligible list detail page will display.

*Please Note:
It is recommended that you change the List Name from “Default List” to the type of list you are creating. (E.g. PWOE list, Reassignment List, etc.)

Either Expiration Date or Days Candidate Eligible is required.

For the Days Candidate Eligible field, it is up to the agency to choose number of days; BTAP currently uses 365 days. The number of day is based off the eligible date.

You can create a different recruitment method for each eligible list. It is your choice if you have one list or separate it by list type. Your referral list will break out the candidate list by list type.
4. Populate the eligible list detail page using the fields grid below.

**The fields:** (* Required field)

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>* List Name</td>
<td>Enter the name of the eligible list.</td>
</tr>
<tr>
<td>Display Candidate Status As</td>
<td>If this step is shown, then this message will display to applicants who log back into the applicant portal to see their current application status. Leave this field blank. “You are on the eligible list,” will be the default.</td>
</tr>
<tr>
<td>*Please Note:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>It is important to leave this field blank.</td>
</tr>
<tr>
<td>Promulgation Date</td>
<td>Date when the eligible list was initially created. This date can be adjusted to the date when applicants were placed on the eligible list.</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Either a specific expiration date or the total number of days (below field) is required.</td>
</tr>
<tr>
<td>Days Candidate Eligible</td>
<td>Either the total number of days or specific expiration date (above field) is required.</td>
</tr>
<tr>
<td>* Exam Score Decimal Places</td>
<td>Accept the default or choose a different value.</td>
</tr>
<tr>
<td>* Total Score Decimal Places</td>
<td>Accept the default or choose a different value.</td>
</tr>
<tr>
<td>* Calculate Exam Score Based on Percentage</td>
<td>Select Percentage Score.</td>
</tr>
<tr>
<td>Banded Score (Low) Cutoff Values</td>
<td>Enter the banded score cutoff values separated by commas.</td>
</tr>
<tr>
<td>Band Scores Based On</td>
<td>Selected if the banded scores are based on exam score or total score. Exam score is the composite of all scored evaluation steps without preference points added. Total score is the sum of the exam score points and preference points. The default selection is Exam Score.</td>
</tr>
<tr>
<td>Duplicate Handling</td>
<td>Select from Allow Duplicates, Most Recent Application or Filter Highest Exam Score. The default selection is Allow Duplicates. It is recommended that this be set to Most Recent Application.</td>
</tr>
<tr>
<td>List Type</td>
<td>The default selection is Regular. The Hiring Manager will receive a candidate list (PWOE, etc.) based on the List Type you choose.</td>
</tr>
<tr>
<td>List Status</td>
<td>The default selection is Active.</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter any additional information about the eligible list in this field.</td>
</tr>
</tbody>
</table>

5. Click Save when you’re done.
6. Click the next step name to view applicants by step and advance all passing applicants to the step you created.

7. To place the passing applicants on the eligible list, select Place on Eligible List from the Select Action pulldown, select Passing from the Select Candidate(s) pulldown and click Go.

8. This will display all eligible candidates. Leave the default of today’s date from the Eligible Date field. Select your list (if you renamed it from the Default list) from the Select List field.

9. After the passing applicants are placed on the eligible list, click View Exam Plan.

*Please Note: Eligible date reflects today’s date. This is important to consider for candidate list expiration.*
10. To view the eligible list, click View Candidates from the Eligible Lists section.

Module 10: Create a referred list

After you place all eligible applicants on an eligible list, you will refer these same applicants to the hiring manager. This referral action creates a referred list. Once the referred list is created the hiring manager can begin reviewing applications, scheduling applicants for hiring interviews and eventually hire the ideal applicant.

Steps to create a referred list

1. If you’re not already viewing your eligible list, return back. You have a couple of ways to get there: (1) return to your exam plan and click View Candidates from the Eligible Lists section, or (2) click Eligible on the Lists menu and then click the list name from the List column.

*Please Note:
As part of application process, candidates are asked 3 questions which will display on your eligible list if applicable:
1. Are you a current commonwealth employee?
2. If yes, provide your employee number.
3. If yes, provide your current department

*Please Note:
For senior level actions, all approvers must be added as a hiring manager to access the referral list.

This is a temporary work around.
2. To create a referred list, select Refer from the Select Action pulldown, select All Candidates from the Select Candidate(s) pulldown, select your open requisition from the Select Requisition pull down and click Go.

3. The refer eligible candidates page will display. Enter any HR appropriate informational text in the Comments box. This will display to the hiring manager at the top of the referred list. Click Refer when you’re done. This will trigger an email notification to all hiring managers assigned to the requisition regarding the new referred list of applicants.

*Please Note: Whenever entering comments, ensure they are HR appropriate. In some cases the information is discoverable.*
Users have the ability to view the commented entered by the HR User on the Insight side. This is found in the Requisition Detail screen.

*Please Note:*
Notes are displayed in reverse chronological order (i.e. most recent comments first.

4. Click Edit to make updates to the recently created referred list.
5. The edit referred list page will display.

![Image](image)

5. Populate the eligible list detail page using the fields grid below.

**The fields (\* Required field)**

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Candidate Status As</td>
<td>If this step is shown, then this message will display to applicants who log back into the applicant portal to see their current application status. Leave this field blank. “Referred to hiring manager,” will be the default.</td>
</tr>
<tr>
<td>*Please Note:</td>
<td>It is important to leave this field blank.</td>
</tr>
<tr>
<td>Referred List Inactivity Notice</td>
<td>An email notification will be sent to the assigned analyst if the assigned hiring managers have not taken action on the list after the number of days specified in this field.</td>
</tr>
<tr>
<td>Referred List Expiration Notice</td>
<td>An email notification will be sent to the assigned hiring managers regarding the soon-to-be-expired list based on the number of days specified in this field.</td>
</tr>
<tr>
<td>Referred List Expiration Days</td>
<td>Either the total number of days or specific expiration date (below field). This can be edited later by going to Insight &gt; Lists &gt; Referred. Search for the appropriate entry and click the pencil icon to edit the Referred List Expiration Days field.</td>
</tr>
<tr>
<td>Referred List Expiration Date</td>
<td>Either a specific expiration date or the total number of days (above field). This can be edited later by going to Insight &gt; Lists &gt; Referred. Search for the appropriate entry and click the pencil icon to edit the Referred List Expiration Date field.</td>
</tr>
</tbody>
</table>

7. Click Save when you’re done.
Module 11: Complete interview and hiring tasks

Once a referred list of qualified applicants has been created for the assigned hiring manager to review, this will trigger an email notification to the hiring manager assigned to the requisition regarding the new referred list of applicants. Now the hiring manager can begin reviewing applications, scheduling applicants for hiring interviews and eventually hire the ideal applicant.

Schedule Interviews

Steps to Schedule Interviews

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

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

3. You’re now viewing the referred list. To schedule interviews, the view must be switched to referred candidates. On the doughnut chart, click Referred, or on the Candidates menu, click Referred.

*Please Note: Insight is not compatible with Outlook; therefore, it is not recommended that you schedule applicants in Insight.

*Please Note: User must be added as a hiring manager on the requisition to have access to the referred list.

*Please Note: The candidate list is sorted alphabetically in OHC and by referral date in Insight. The Insight user can change the default sorting method for specific requisitions.
4. Select the candidates that will be moved to the interview step. The candidate list is sorted alphabetically in OHC and by referral date in Insight. The Insight user can change the default sorting method for specific requisitions.

5. On the Actions menu, click Move to Interview.

![Move to Interview screenshot]

Note: The hire workflow in the above and following images has been renamed to Skype Interview. This is to distinguish between a first interview (Skype) and a second interview (on-site). If you only have one interview, then renaming is not necessary.

6. Click OK to confirm moving the candidates.

7. On the doughnut chart, click Interview, or on the Candidates menu, click Interview.

![Doughnut chart with Interview selection]

71
8. From the first candidate to be scheduled for an interview, click Unscheduled.

![Scheduled Candidates](image1)

9. Complete the schedule form and click Save.

![Interview Details](image2)

Note: The Interviewer field displays all users with the Rater role—spanning all departments/divisions—providing a flexible rating platform for your entire organization.

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

**Send Notices**

**Steps to Send Notices**

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

![My Candidates](image3)
2. On the doughnut chart or on the Candidates menu, click the step name where candidates require notification.

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

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

*Please Note:
For non-selected candidates, use the Send Notices action to select a notice template.

**This feature should not be used until the job offer is accepted.

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

8. Click Send to send the notice to all selected candidates.
Reject a Candidate

HR must complete this function, not the hiring manager.

Steps to Reject a Candidate

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

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

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

*Please Note: To reject a candidate you need to be in the OHC environment.

*Please Note: Do not use the “Offered” selection from the Referred drop-down list; the commonwealth will not be utilizing that status.

*Please Note: To reject a candidate you need to be in the OHC environment.

*Please Note: Do not use the “Offered” selection from the Referred drop-down list; the commonwealth will not be utilizing that status.

*Please Note: To reject a candidate you need to be in the OHC environment.
4. On the Actions menu, click Reject.

5. Click , select a reject reason and click Done.

6. Once appropriate reject reason has been selected, save. Do not enter comments.

7. Repeat these steps for any remaining rejected candidates.

*Please Note: Always use a pre-selected Reject Reason; do not enter comments.*
Steps to Reject Candidates in Bulk

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

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

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

3. Select the all candidates that will have the same reject reason.
4. On the Actions menu, click Reject.

5. Click select a reject reason and click Done.

6. Do not enter comments. Click save.

7. Repeat these steps for any remaining rounds of rejected candidates.
Hire a Candidate

Steps to Hire a Candidate

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

   ![My Candidates screenshot](image1)

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

   ![Doughnut chart screenshot](image2)

3. Click the name the candidate to hire.

   ![Candidate screenshot](image3)

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

   ![Actions menu screenshot](image4)

*Please Note: Once a requisition and exam plan number have been generated (they will be the same number), write them down because you will need them when it’s time to complete the Hire a Candidate process.*
5. Enter the start date and any additional details.

6. Populate the question form using the fields grid on the next page.
### The fields (* Required field)

<table>
<thead>
<tr>
<th>Field</th>
<th>What to enter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position</strong></td>
<td>Select appropriate position the candidate is being hired to from the Make a Selection drop-down.</td>
</tr>
<tr>
<td><strong>Offer Date</strong></td>
<td>Fill in this field, Date Offer Accepted and Start Date with the date you are inputting the action. When you have the accurate data later in the process, update the dates.</td>
</tr>
<tr>
<td><strong>Date Offer Accepted</strong></td>
<td>Fill in this field, Offer Date, and Start Date with the date you are inputting the action. When you have the accurate data later in the process, update the dates.</td>
</tr>
<tr>
<td>Offer Amount</td>
<td>Leave blank.</td>
</tr>
<tr>
<td>Bonus Amount</td>
<td>Leave blank.</td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td>Fill in this field, Offer Date and Date Offer Accepted with the date you are inputting the action. When you have the accurate data later in the process, update the dates.</td>
</tr>
<tr>
<td>Orientation Date</td>
<td>Leave blank for now; complete after hire is authorized.</td>
</tr>
<tr>
<td>Filled Date</td>
<td>Leave blank for now; complete after hire is authorized.</td>
</tr>
<tr>
<td>Dept. Code</td>
<td>Enter department code who candidate will be employed by.</td>
</tr>
<tr>
<td>Location</td>
<td>Pre-populated based on position selected.</td>
</tr>
<tr>
<td>Barg Unit</td>
<td>Pre-populated based on position selected.</td>
</tr>
<tr>
<td>Pay Scale</td>
<td>Pre-populated based on position selected.</td>
</tr>
<tr>
<td><strong>Pay Level</strong></td>
<td>Complete with appropriate pay level; this should coincide with the pay scale entered.</td>
</tr>
<tr>
<td><strong>Annual Salary</strong></td>
<td>Complete with appropriate annual salary; this should coincide with the pay scale entered.</td>
</tr>
<tr>
<td>Candidate Recruitment/Qualifying Method</td>
<td>Select appropriate choice from the drop-down list. This is a multi-select field.</td>
</tr>
<tr>
<td><strong>Bi-Weekly Salary</strong></td>
<td>Complete with appropriate bi-weekly salary; this should coincide with the pay scale entered.</td>
</tr>
<tr>
<td><strong>Exam Plan Number</strong></td>
<td>Enter with appropriate exam plan number tied to the position.</td>
</tr>
<tr>
<td>SCSC Certification Number</td>
<td>For Civil Service list hires, insert a certification number. For internal hires, leave this field blank. The Civil Service Commission will be reviewing for accuracy.</td>
</tr>
<tr>
<td><strong>Requisition Number</strong></td>
<td>Enter with appropriate requisition number tied to the position.</td>
</tr>
<tr>
<td>Active on Eligible List</td>
<td>Automatically turned off. Once a candidate is hired, it will automatically inactivate them from eligibility list. If you’d like them to remain active, turn that on. In most cases, you will want to keep this as off.</td>
</tr>
<tr>
<td>Senior Level Background Check</td>
<td>If submitting a senior level hire, indicate if the position requires a background check by OIG</td>
</tr>
</tbody>
</table>
7. Once you’re done, click Save & Continue to Next Step.

8. For non-senior level position actions, the approval workflow template displays on the second hire form page as follows: BTAP workflow, SCSC and HR. HR can remove an approval step if appropriate. Any changes will only be applied to this hire, not the saved approval workflow template. Do not modify workflow for senior level position actions.

*Please Note:
Offer Date, Date Offer Accepted and Start Date are all required fields. At this stage, use the same date (the date the hire form was submitted) when completing each field. Dates should be updated later for accuracy.

9. Click Save & Continue to Next Step.

10. Drag any file attachments to the third hire form page and click Save & Submit. For senior level positions, you must attach a resume to the hire form.

*Please Note:
For senior level positions, you must attach a resume to the hire form.

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

Steps to Approve a Hire

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

![Dashboard Image]

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

![My Tasks Image]

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

![Hire Approval Image]
Module 12: Authorize a new hire and fill a requisition

Approving a new hire will trigger an email notification to the assigned analyst of the requisition regarding authorizing the new hire and filling the requisition.

Steps to authorize a new hire and fill a requisition

1. You will be performing two close out tasks: authorizing the new hire and filling the requisition. If you’re not already in Insight, return back. Click Insight on the NEOGOV product menu.

2. The recently-hired applicant displays from the Hires section on your My HR page. Click the name of the applicant.

3. The personnel action form will display. Review the form and then click Edit to start the authorization process.

*Please Note:
Reminder – at this time, ensure the Offer Date, Date Offer Accepted, Start Date, and Filled On Date has been updated for accuracy. It is very important that the Start Date be accurate for both metrics and onboarding set-up.

If your agency isn’t authorizing the hire (BTAP will be the final authorization for all NCS external hires), you need to go back in later and update the dates or inform BTAP of the correct dates by adding comments during the HR approval step.
4. Click Save and Authorize.

5. An approval confirmation will display.

6. Now it’s time to change the requisition status from open to filled. Return back to your exam plan. Click the exam number My HR page, or click Exam Plans on the Jobs menu and then click the job title from the Exam Plan column.

7. Click the Authorize icon from the Requisitions section.

8. Select Filled from the Status pulldown and click Save.
Module 13: Archiving

After the position is filled, HR will archive the job posting, exam plan, referral list and eligible list.

*Please Note:
Timely archiving will help you to easily manage your queue by having less to view and manage in your dashboard.

Steps to archive a job posting

This must be done from the Exam Plan Detail screen. Select the Archive option from the Action column.

Steps to archive a referral list

1. Click referral list from the List section.
2. Click on the Archive icon from the Action column.
3. Click OK to archive the referral list

![Message from webpage]

**Steps to archive an eligible list**

**Note**: Archiving exam plan automatically inactivates eligible lists.

1. From the List Type drop down box, choose Archived.
**Steps to archive an exam plan**

**Note:** Archiving exam plans automatically inactivates eligible lists

1. This must be done from the Exam Plans screen. Select the Archive icon from the Action column.

2. Click OK to archive the Exam Plan

**Trainer Note:**
Anything you archive can be un-archived and edited. Simply click the file drawer icon in the action column of the exam plan, list, etc.

Thank you!
APPENDIX

What’s changing beginning go-live on April 17th?

A revised employment website will be launched.

• An updated, modern employment site (www.employment.pa.gov) will be launched on April 17th.
  ✓ The updated website will have a new look and feel and will include information about employee spotlights, benefits/incentives to working for the commonwealth, an internship listing/vacancies, highlights of living in PA, veterans’ information, recruitment videos, and the external job listing page.
  ✓ All NCS external hiring will be done through vacancy-based postings.
  ✓ Open civil service examinations will be posted on the site and will include a link to the test announcement on the civil service website.
  ✓ Applicants will be directed to one website to apply, which will clarify the hiring process for all applicants.
  ✓ “Job Alerts” will be featured on the external job listing page. Applicants can use these alerts to sign up to receive an email notification when future positions are posted in their job categories of choice.

✓ “Request to Fill” ePARs will be replaced by NEOGOV requisitions.

• There will be an automated approval processes for hiring.
  ✓ Please note that some CS approvals will still be outside NEOGOV.

• All internal postings (NCS & CS, no exam) must be posted on NEOGOV.
  ✓ Agencies will discontinue use of State Job Net for internal postings.
  ✓ Agencies will continue to print and post union-covered job postings on bulletin boards, per current agreements.
  ✓ Agencies will still be required to assist employees to apply online for vacancies, or agencies must input employees’ information into NEOGOV if employees are unable to apply through NEOGOV on their own.
  ✓ Direct hires will need to apply through NEOGOV rather than simply completing a paper application and submitting an ePAR to Fill.

• Agencies will draft posting language using marketing techniques when creating their NCS external postings.

• Hires from a civil service list, seniority hires, and senior level hires will complete a NEOGOV application upon receiving a conditional offer to ensure all hires are in the NEOGOV system.
NEOGOV will replace other forms/systems.

- The Senior Level Approval System will be replaced by NEOGOV.
- The Personal Data Sheet Form will be replaced by NEOGOV.
- The Furlough Placement Questionnaire will be replaced by NEOGOV.
  ✓ Furloughes will apply through NEOGOV.
  ✓ BTAP will populate data for each furloughee using SAP data.
  ✓ Agencies will still need to ensure the accuracy of SAP data for employees being furloughed.

Screening tools will be available for non-civil service positions. Additional resources will be accessible to NEOGOV users.

- Agencies can draft supplemental questions relating to METs and desired experience to use as an initial screening. Manual application review may also need to take place.
- Agencies can create a scoring plan that can be used as a screening tool.
- Supervisors/managers will be able to access application information electronically for each referred candidate.

Where should you go for support or reference materials?

- Prior to go-live, agency HR questions should be directed to Shelly Forte (717) 783-2224, Miranda Martin (717) 857-3309, or Heather Kenyon (717) 857-3272.
- After go-live, agency HR questions should be directed to BTAP (717) 787-5703.
- Prior to and after go-live, employees trained in the agencies should contact their HR office with questions.
- Requests for NEOGOV-related reports should be directed to the HR Service Center.
- Training materials will be stored on the HRM portal (www.hrm.oa.pa.gov), which is accessible to all users.
- Employees trained in the agencies will be asked to complete an evaluation to assess their training experience and the need for follow-up.
Create a Posting for Senior Level Candidates and Hires from a Civil Service List

This procedure instructs agencies to create a generic posting for senior level (SL) candidates and hires from a CS list for which to apply. This can be created as a continuous posting but will need to be monitored by HR biweekly or monthly to ensure candidates who have applied in error are notified that this is not a posting for a vacancy (even if the posting says it is).

1. Create an exam plan to create a posting for SL candidates and hires from CS lists. There is no need to submit a requisition for this posting. Choose Job Code 00000 (Internal) when creating the exam plan.
2. Create a posting on the internal job listing page - see screenshots below. The posting will need to be assigned to a specific agency user. It is recommended that the user be assigned to manage/monitor the posting.
3. **Posting Title:** Add “Internal Use Only.”
4. **Position Section:** Add the verbiage “This posting is not a posting for a specific vacancy. This is for internal use only.”
5. Leave the remaining sections of the posting blank.
6. There are two options for open/close dates of this posting.
   a. For agencies with a high volume of hires from CS lists, you would want to create a continuous posting. To do so, check the box for continuous at the top of the posting page (see Module Four of the Insight Guide).
   b. For agencies that don’t have a high volume, create the posting as a draft, and open and close the posting with each hire.
   c. **Keep in mind that the posting will need to be monitored by HR biweekly or monthly to ensure candidates who have applied in error are notified that this is not a posting for a vacancy (even if the posting says it is).**
7. Uncheck the Draft button and publish the posting.
8. Create two eligible lists for the exam plan: one for the senior level candidates (list type “Senior Level”) and one for the civil service exam candidates (list type “Civil Service Exam”).
## Screenshots for Senior Level Candidates/CS Hire Postings

### Exam Plan:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Executive Offices</td>
</tr>
<tr>
<td>Division</td>
<td>Select</td>
</tr>
<tr>
<td>Job Spec</td>
<td>00000 - Internal</td>
</tr>
<tr>
<td>Job Title</td>
<td>Internal Use Only</td>
</tr>
<tr>
<td>Exam Number</td>
<td>2017-01-00000</td>
</tr>
<tr>
<td>Vacancies</td>
<td></td>
</tr>
<tr>
<td>Exam Type</td>
<td>Open</td>
</tr>
<tr>
<td>Job Type</td>
<td>Various Types</td>
</tr>
</tbody>
</table>

### Posting:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exam Plan</td>
<td>2017-09-00000 - Internal Use Only</td>
</tr>
<tr>
<td>Department</td>
<td>Executive Offices (81)</td>
</tr>
<tr>
<td>Division</td>
<td></td>
</tr>
<tr>
<td>Job Spec</td>
<td>Internal (00000)</td>
</tr>
<tr>
<td>Job Title</td>
<td>Internal Use Only</td>
</tr>
<tr>
<td>Job Number</td>
<td>2017-01-00000</td>
</tr>
<tr>
<td>Job Type</td>
<td>Various Types</td>
</tr>
<tr>
<td>Job List</td>
<td>Promotional Jobs</td>
</tr>
<tr>
<td>Exam Type</td>
<td>Open</td>
</tr>
<tr>
<td>Advertise From</td>
<td>01/01/2017</td>
</tr>
<tr>
<td>Advertise To</td>
<td>12/31/2017 11 pm 59</td>
</tr>
<tr>
<td>Category</td>
<td>911 Telecommunications</td>
</tr>
<tr>
<td>Location On Job</td>
<td>State-Wide</td>
</tr>
<tr>
<td>Application Template</td>
<td>CDRA Employment Application -</td>
</tr>
</tbody>
</table>
**Posting Overview:**

<table>
<thead>
<tr>
<th>Job #</th>
<th>Hits</th>
<th>Active</th>
<th>Total</th>
<th>Advertised</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-81-00000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>01/01/17 - 12/31/17 11:59 PM</td>
</tr>
</tbody>
</table>

**THE POSITION**

- Job Title: Internal Use Only
- Closing Date/Time: Sun, 12/31/17 11:59 PM Eastern Time
- Job Type: Various Types
- Location: State-Wide, Pennsylvania
- Department: Executive Offices

This posting is not a posting for a specific vacancy. This is for internal use only.

**Evaluation Step:**

<table>
<thead>
<tr>
<th>Definition</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step Type</strong></td>
<td>Supplemental Questionnaire</td>
</tr>
<tr>
<td><strong>Step Name</strong></td>
<td>Application Review</td>
</tr>
</tbody>
</table>
Eligible Lists:

Reminder – Create two eligible lists for the exam plan: one for the senior level candidates (list type “Senior Level”) and one for the civil service exam candidates (list type “Civil Service Exam”).

<table>
<thead>
<tr>
<th>Eligible Lists</th>
<th>List Name</th>
<th>List Type</th>
<th>Expiration Date</th>
<th># On List Total</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Civil Service Exam</td>
<td>Civil Service Exam</td>
<td>N/A</td>
<td>1</td>
<td>Edit, View Candidates, Audit Trail</td>
</tr>
<tr>
<td></td>
<td>Senior Level</td>
<td>Senior Level</td>
<td>N/A</td>
<td>0</td>
<td>Edit, View Candidates, Audit Trail</td>
</tr>
</tbody>
</table>
Printed Job Posting Bulletin
(Note – fields for bargaining unit and pay group are being added to the printed bulletin.)

COMMONWEALTH OF PENNSYLVANIA
invites applications for:

Claims Investigation Agent

The Commonwealth of Pennsylvania is proud to be an equal opportunity employer supporting workplace diversity.

<table>
<thead>
<tr>
<th>SALARY:</th>
<th>$41,956.00 Annually</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOB TYPE:</td>
<td>Non-Civil Service Permanent Full-time</td>
</tr>
<tr>
<td>DEPARTMENT:</td>
<td>Executive Offices</td>
</tr>
<tr>
<td>LOCATION:</td>
<td>Bucks County</td>
</tr>
<tr>
<td>OPENING DATE:</td>
<td>08/04/17</td>
</tr>
<tr>
<td>CLOSING DATE:</td>
<td>08/14/17 11:59 PM</td>
</tr>
<tr>
<td>JOB CODE:</td>
<td>07402</td>
</tr>
<tr>
<td>POSITION NUMBER:</td>
<td>00051953</td>
</tr>
<tr>
<td>UNION:</td>
<td>SEIU Local 668</td>
</tr>
<tr>
<td>BARGAINING UNIT:</td>
<td>F4</td>
</tr>
<tr>
<td>PAY GROUP:</td>
<td>ST06</td>
</tr>
<tr>
<td>BUREAU/DIVISION CODE:</td>
<td>6124</td>
</tr>
<tr>
<td>BUREAU/DIVISION:</td>
<td>Bureau of Fraud Prevention &amp; Prosecution</td>
</tr>
<tr>
<td>WORKSITE ADDRESS:</td>
<td>1214 Veterans Highway</td>
</tr>
<tr>
<td>CITY:</td>
<td>Bristol</td>
</tr>
<tr>
<td>ZIP CODE:</td>
<td>19007-2593</td>
</tr>
<tr>
<td>CONTACT NAME:</td>
<td>****</td>
</tr>
<tr>
<td>CONTACT PHONE:</td>
<td>****</td>
</tr>
<tr>
<td>CONTACT EMAIL:</td>
<td>****</td>
</tr>
<tr>
<td>THE POSITION:</td>
<td>****</td>
</tr>
</tbody>
</table>
**Dual Postings with One Posting**

This procedure should be used when an agency has one vacancy and creates one posting with two different parentheticals or two levels (i.e. HR Analyst 1 or HR Analyst 2) within a class series to increase the potential candidate pool.

1. Create two requisitions – one for each classification.
2. Route one through all approval steps with comments indicating that it will be posted at two different levels, using two different job titles.
3. Delete all approval steps for the second requisition because you only need one set of approvals to post a vacancy.
4. Open both requisitions in Insight.
5. Since you will create one posting, you will create one exam plan.
6. Choose a requisition and select create exam under the requisitions section of your dashboard.
7. Choose an existing requisition (the exam plan you just created) for the second requisition.
8. Create the posting with both job titles (list both sets of METs and posting requirements).
9. Proceed with the selection process.
10. Cancel the requisition you are not using to hire the selected candidate.
11. Process the hire using the hire form for the appropriate requisition.

**Dual Postings with More than One Posting**

This procedure should be used when an agency has one vacancy and creates more than one posting with two or more different job titles (not necessarily in a class series) to increase the potential candidate pool.

1. Create two requisitions – one for each classification.
2. Route one through all approval steps with comments indicating that it will be posted at two different levels, using two different job titles.
3. Delete all approval steps for the second requisition because you only need one set of approvals to post a vacancy.
4. Open both requisitions in Insight.
5. Choose a requisition and select create exam under the requisitions section of your dashboard.
6. Repeat this step for the next requisition.
7. Post both positions.
8. Proceed with the selection process.
9. Cancel the requisition you are not using to hire the selected candidate.
10. Process the hire using the hire form for the appropriate requisition.
Paper Bid Forms

Agency employees without computer access or who are not computer literate are permitted to apply through the existing paper bid process when applying for internal jobs. The required NEOGOV application and agency-wide questions will be stored on the HRM portal. These questions should be included with the agency’s current bid form so agency HR has all the information from the employee when inputting the paper application on behalf of the employee.

1. You will post all internal jobs in NEOGOV effective April 17, 2017.
2. HR should encourage employees to apply online through NEOGOV but must accept paper bids if the employee does not have access to the computer or is not comfortable using a computer.
3. HR will accept paper and online applications for each union posting.
4. Exception – For seniority postings, HR must ensure that the most senior employee who accepts the job offer for the vacancy is entered into NEOGOV. To clarify, only the most senior candidate must be entered into NEOGOV.
5. For entry-level union covered positions, applicants must either apply online or HR must enter the paper bid forms on behalf of employees applying with paper bid forms. To clarify, all paper bid forms submitted by employees for entry-level union covered positions need to be entered into NEOGOV on behalf of the employees.
Seniority Postings

**Posted** – This procedure is for agencies that post seniority positions.

1. Create a requisition and post the seniority position.
2. HR will accept paper and online applications.
3. If the most senior candidate who accepts the position applies online to the posting, process the hire by creating the eligible list and referral list with only the seniority employee’s name.
   
   **NOTE:** Only the most senior candidate who accepts the position needs to be entered into NEOGOV if he/she applied using the agency’s paper bid form.
4. For those seniority hires who apply using a paper bid form, HR will enter the application on behalf of the hire, move the employee to the eligible list, refer the employee, and process the hire.

**Not Posted** – This procedure is for agencies that do not post seniority positions.

1. The agency identifies the most senior candidate and offers the job. If the most senior employee accepts the job, HR will direct the employee to apply to the Department’s *Internal Use Only* posting or submit a paper bid form.
2. HR will initiate a requisition in NEOGOV.
3. After the requisition is approved, HR will open the requisition in Insight.
4. HR will choose an existing exam plan rather than creating a new one.
5. HR will choose the Department’s *Internal Use Only* exam plan and posting.
6. HR will move the seniority employee to the eligible list and a referred list.
7. HR will change the status of the employee in OHC to hire and initiate the hire form to route through the final approval workflow.
8. Once the hire is approved and authorized, HR will close the requisition and archive the referred list.
9. HR will initiate the ePAR to appoint.
Hires from a Civil Service List

This procedure outlines how to hire a candidate from a civil service list through NEOGOV.

If the agency requests a list without posting the job:

1. Agencies will request civil service lists from the SCSC AS/400 system.
2. Once a hire is selected from a civil service list, HR will initiate a requisition in NEOGOV.
3. After the requisition is approved, HR will open the requisition in Insight.
4. HR will choose an existing exam plan for Department’s Internal Use Only rather than creating a new one.
5. After the selected candidate is identified, HR will ask the candidate to apply to the Department’s Internal Use Only posting.
6. HR will move the candidate to the eligible list (create a civil service exam eligible list to distinguish from SL candidates) and create a referred list.
7. HR will change the status of the candidate in OHC to hire and initiate the hire form to route through the final approval workflow.
8. Once the hire is approved, HR will authorize the hire, close the requisition, and archive the referred list.
9. HR will initiate the ePAR to appoint.

If a requisition was initiated to post the job internally and the posting included a CS list as an option, follow these steps:

1. When the decision is made to hire from the CS list, agency HR will assign the requisition to the Department’s Internal Use Only posting (you have already received approval from the initial requisition when the vacancy was posted).
2. HR will choose an existing exam plan for Department’s Internal Use Only rather than creating a new one.
3. After the selected candidate is identified, HR will ask the candidate to apply to the Department’s Internal Use Only posting.
4. HR will move the candidate to the eligible list (create a civil service exam eligible list to distinguish from SL candidates) and create a referred list.
5. HR will change the status of the candidate in OHC to hire and initiate the hire form to route through the final approval workflow.
6. Once the hire is approved, HR will authorize the hire, close the requisition, and archive the referred list.
7. HR will initiate the ePAR to appoint.
Senior Level Hires

This procedure outlines how to hire a senior level (SL) candidate through NEOGOV.

Request to post a senior level job:

1. The agency will contact the Director of BTAP to discuss the recruitment plan for the senior level opening.
2. If approved by the Director of BTAP, the agency will initiate a requisition. (The agency will choose the appropriate SL organization (must choose the SL org) as part of creating the requisition. This is critical to the SL process.)
3. BTAP will approve the requisition and link it to the Department’s Internal Use Only exam plan and posting for external postings. The agency will create the exam plan or use the Internal Use Only existing exam plan and posting for internal postings.
4. BTAP or the agency will ask the candidate to apply to the Department’s Internal Use Only posting.
5. BTAP or the agency will move the candidate to the eligible list (create an SL eligible list to distinguish from the CS hires) and create a referred list.
6. The agency will change the status of the SL candidate to hire and initiate the hire form.
7. The approvers will already be defaulted for the approval steps. Agency HR should not make any changes to the workflow for the selected candidate.
8. After the hire is approved, HR will receive the Approval to Appoint memo, close the requisition, and archive the referred list.
9. HR will initiate the ePAR to appoint.
No posting for senior level external candidate:

1. The Director of BTAP will contact the agency to discuss the recruitment plan for the senior level opening.
2. BTAP will contact the agency to have the agency initiate a requisition. Agencies will choose the appropriate SL organization (must choose the SL org) as part of creating the requisition. **This is critical to the SL process.**
3. BTAP will approve and open the requisition, and link it to the Department’s *Internal Use Only* exam plan and posting.
4. BTAP or the agency will ask the candidate to apply to the Department’s *Internal Use Only* posting.
5. BTAP will move the candidate to the eligible list (create an SL eligible list to distinguish from the CS hires) and create a referred list.
6. HR will change the status of the SL candidate to hire and initiate the hire form.
   (The approvers will already be defaulted for the approval steps. **Agency HR should not make any changes to the workflow for the selected candidate.**)
7. After the hire is approved, HR will receive the Approval to Appoint memo, close the requisition, and archive the referred list.
8. HR will initiate the ePAR to appoint.

No posting for senior level internal candidate:

1. Agency will contact the Director of BTAP to discuss the recruitment plan for the senior level opening.
2. If approved by the Director of BTAP, the agency will initiate a requisition. Agencies will choose the appropriate SL organization (must choose the SL org) as part of creating the requisition. **This is critical to the SL process.**
3. The agency will open the approved requisition in Insight and link it to the Department’s *Internal Use Only* exam plan and posting.
4. The agency will ask the candidate to apply to the Department’s *Internal Use Only* posting.
5. The agency will move the candidate to the eligible list (the SL eligible list) and create a referred list.
6. HR will change the status of the SL candidate to hire and initiate the hire form.
7. The approvers will already be defaulted for the approval steps. Agency HR should not make any changes to the workflow for the selected candidate.
8. After the hire is approved, HR will receive the Approval to Appoint memo, close the requisition, and archive the referred list.
9. HR will initiate the ePAR to appoint.
NCS Management Internal Hires (no posting)

An agency has an internal candidate for a NCS management position and is not planning to post the position.

1. Once an employee is selected, HR will initiate the requisition and wait for approval.
2. After the requisition is approved, HR will open the requisition in Insight.
3. HR will choose an existing exam plan for Department’s Internal Use Only, rather than creating a new one.
4. HR will ask the selected employee to apply to the Department’s Internal Use Only posting.
5. HR will move the candidate to the eligible list and create a referred list.
6. HR will change the status of the candidate in OHC to hire and initiate the hire form to route through the final approval workflow.
7. Once the hire is approved, HR will authorize the hire, close the requisition, and archive the referred list.
8. HR will initiate the ePAR to appoint.

Annuitant Hires (no posting)

An agency has an annuitant candidate to hire.

1. Agencies will identify an annuitant and ensure the person is interested in the emergency appointment.
2. Once an annuitant is selected, HR will initiate a CAR-A and wait for approval.
3. Once the CAR-A is approved, a requisition should be initiated in NEOGOV.
4. After the requisition is approved, HR will open the requisition in Insight.
5. HR will choose an existing exam plan for Department’s Internal Use Only, rather than creating a new one.
6. HR will ask the annuitant to apply to the Department’s Internal Use Only posting.
7. HR will move the candidate to the eligible list (create an annuitant eligible list to distinguish from CS hires and SL candidates) and create a referred list.
8. HR will change the status of the candidate in OHC to hire and initiate the hire form to route through the final approval workflow.
9. Once the hire is approved, HR will authorize the hire, close the requisition, and archive the referred list.
10. HR will initiate the ePAR to appoint.
Internal/External Simultaneous Postings

This procedure outlines how agencies will post a job internally and externally simultaneously if BTAP approves the request.

1. HR will initiate a requisition to post an external job and, in the Comments box, will include the request to post internally simultaneously. Attachments will include the external posting language and MET supplemental questions.
2. Once BTAP approves the requisition, they will create the external posting and exam plan.
3. In Insight, HR will create the exam plan and create the internal posting. Be sure to unclick the Allow for Electronic Submissions box at the top of the posting template so the Apply button does not show to the applicant. Include the suggested language below and link to the external posting in Section 3 of the posting template.
   Suggested language: This position is filled through a posting on www.employment.pa.gov. Please click on the link below to review the posting and apply. (Link)
4. HR and BTAP will coordinate the date that the external and internal postings will publish to the posting pages.
5. Once there is a selected candidate, HR will change the status of the candidate in OHC to hire and initiate the hire form to route through the final approval workflow.
6. Once the hire is approved, HR will authorize the hire, close the requisition, and archive the referred list.
7. HR will initiate the ePAR to appoint.

Copy a Posting

This procedure outlines the steps to copy a previous posting to re-post with/without edits.

1. Go to your My HR dashboard and find the old posting. Click on Copy Posting (or Copy Job Posting & Scoring Plan) at the top of the page.
2. Create a new exam plan.
3. Create a requisition and move it through the approval process.
4. After opening the requisition, you will see the copied posting in the new exam plan.
5. Make edits to the posting and supplemental questions as necessary.
6. Uncheck the Draft box at the top of the posting template to publish the posting.
Moving a Requisition to BTAP to Post Externally after Posting Internally

This procedure instructs agencies on how to move a requisition to BTAP to post externally after posting internally and not finding any eligible candidates.

1. Go to the exam plan.
2. Under the tasks section, click on Add New.
3. Complete the short form as follows:
   a. Assigned To: Select your liaison in the Bureau of Talent Acquisition and Planning
   b. Subject: External Posting Request
   c. Status: In Progress
   d. Priority: Normal
   e. Due Date: (not required so leave this field blank)
   f. Keep the Send Email box marked.
   g. Comments Section: Please reassign to BTAP and post externally.
4. Click send.
Supplemental Questions

MET supplemental questions for the top 25 frequently filled NCS positions will be available in the item bank.

1. MET questions will be saved by the job code and job title.
2. Search in the item bank by job code and/or job title. If questions do not show, you will have to draft MET questions. Please save your questions in the item bank using your agency name, job code, and job title.
3. For assistance drafting MET questions, please contact Heather Kenyon at hkenyon@pa.gov.

Hire Form

Reminder: Ensure that all date fields on the hire form are changed to reflect accurate dates prior to archiving the exam plan, eligible list, posting, or referred list.

Searching Archived Postings

Below are the steps to access archived postings.

1. Go to your My HR page in Insight.
2. Go to the postings section.
3. Use the drop-down menu next to the posting section to filter by Active Draft or Inactive. Choose Inactive to view an archived posting.
Rejection Reasons

Below are the rejection reasons in NEOGOV.

- Applicant Deceased
- Did Not Show for Interview
- Did Not Respond to Availability Survey
- More Qualified Selected
- Negative Background Check
- Not for Rehire
- Not Interested in the Position
- Declined Job Offer
- Unable to Contact
- Requisition and/or Vacancy Cancelled
- Failed CDL Driving Testing
- Failed Drug & Alcohol Testing
- Does Not Meet METs
- Does Not Meet Internal Recruitment Methods (i.e. Transfer, Reassignment, PWOE)
- Does Not Meet Internal Posting Requirements (i.e. PA Residency, Valid Driver’s License, Special Requirements)
- Did Not Provide All Required Application Materials
- Seniority Bidder Selected
- Filled by Civil Service List
- Negative Criminal Background Check
- Negative Employment History
- Negative References
- Declined Furlough Placement
- Filled by Furlough Placement
- Not a Commonwealth Employee
- Not interviewed, qualifying recruitment method not utilized
**Fair Chance Hiring**

Effective July 1, 2017, the Fair Chance Hiring Policy requires Commonwealth agencies to remove the criminal history question from employment applications, with certain limited exceptions (approved by the governor's policy office), to ensure that hiring managers are initially considering an applicant based on skills and work qualifications, without considering a person’s criminal record.

When creating a posting, select the appropriate application template in NEOGOV. Your options include:

<table>
<thead>
<tr>
<th>Application Templates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>App – criminal history, NO resume required</td>
</tr>
<tr>
<td>App – criminal history, resume required</td>
</tr>
<tr>
<td>App – NO criminal history, NO resume required</td>
</tr>
<tr>
<td>App – NO criminal history, resume required</td>
</tr>
<tr>
<td>Union Furlough Placement</td>
</tr>
</tbody>
</table>

For example, if the vacancy is not exempt from the Fair Chance Hiring Policy and you’re not requiring a resume from applicants, you would select the “App – NO criminal history, NO resume required” template. If you are unsure of about whether a position is exempt from the policy, please consult your agency’s legal or policy office for guidance.

Once your selected candidate has accepted a conditional offer of employment, you may begin conducting background checks, which will include a **criminal background check**.

If a criminal conviction is found, use the EEOC guidelines to determine whether the applicant’s criminal history affects their candidacy for the position. If it does affect their candidacy, the candidate should be afforded an opportunity to provide additional information for the hiring authority to consider before making a final determination. NEOGOV includes notice templates that can be used to communicate with the candidate throughout this process:

- Conviction found, requires explanation
- Explanation received, rescind offer
- No explanation received, rescind offer

Note: If you wish to hire a candidate with a criminal history, you must obtain approval using the Approval to Appoint process prior to extending an official offer.
**Attaching Documents**

**Attaching a document to an applicant’s master profile**

1. From the Applicants dropdown on your dashboard screen, select Applicant Search.
2. Search for the applicant by last name, first name, or Person ID.
3. Click the applicant’s name in the search results to display their master profile.
4. Scroll down to the Attachments section of the master profile, and click Add New.
5. Complete the File Attachment form, and click Upload.

**Attaching a document to an exam plan**

1. From the Jobs dropdown on your dashboard screen, select Exam Plans.
2. Search for the appropriate exam plan, and click the title to open it.
3. Scroll down to the Files section of the exam plan, and click Add New.
4. Complete the File Attachment form, and click Upload.