

Interview Self-Scheduling Guidance

Interview Self-Scheduling Guidance

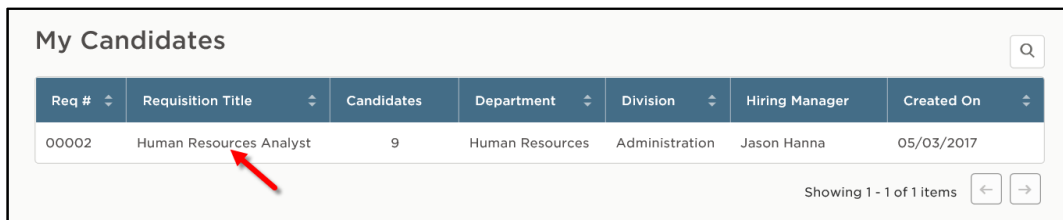
If you are planning to utilize self-scheduling for interviewing, it is important to include the verbiage below on the external vacancy posting at the bottom of the Required Experience, Training & Eligibility section:

“Communication regarding interview scheduling will be sent via email.”

Interview Self-Scheduling Instructions

After logging in to NEOGOV, access the OHC environment.

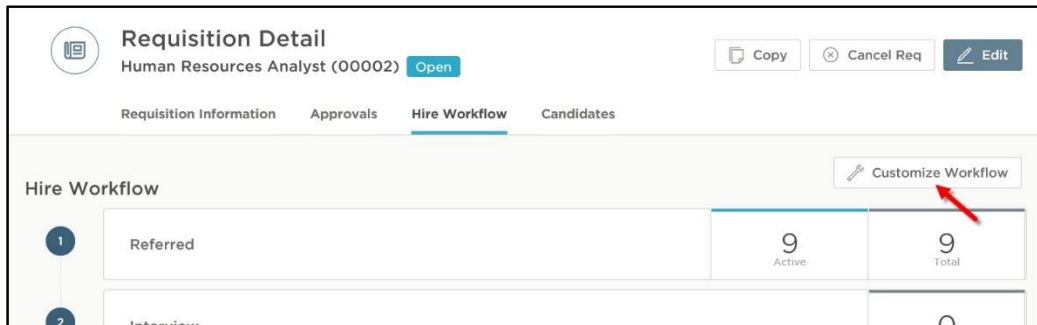
From the My Candidates section of your dashboard, click on the referred list for which you need to create a custom hire workflow to allow for self-scheduling.



Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017

Showing 1 - 1 of 1 items

Click on the Hire Workflow tab and then click on the Customize Workflow button.



Requisition Detail
Human Resources Analyst (00002) [Open](#)

Copy Cancel Req Edit

Requisition Information Approvals **Hire Workflow** Candidates


Hire Workflow

Customize Workflow

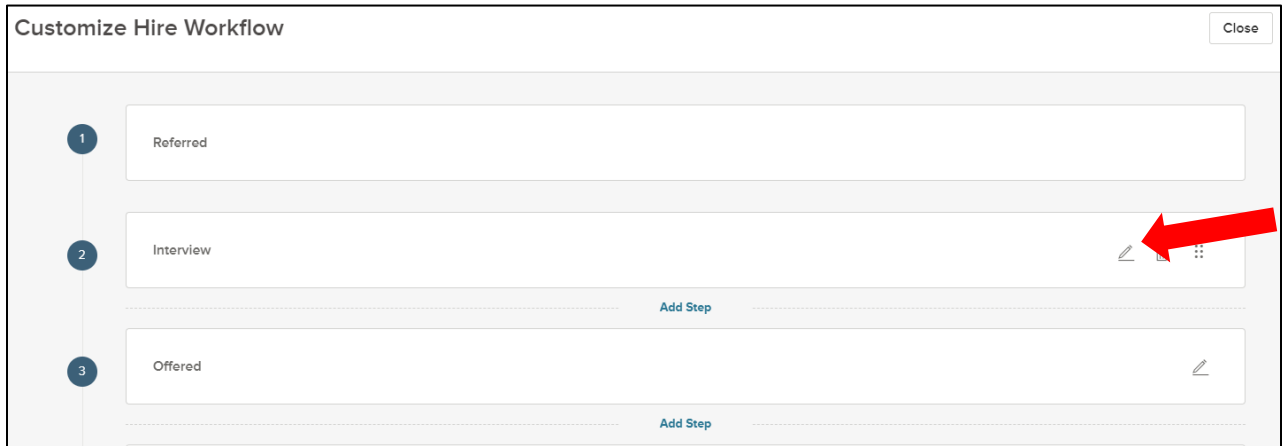
1 Referred 9 Active 9 Total

2 Interview 0

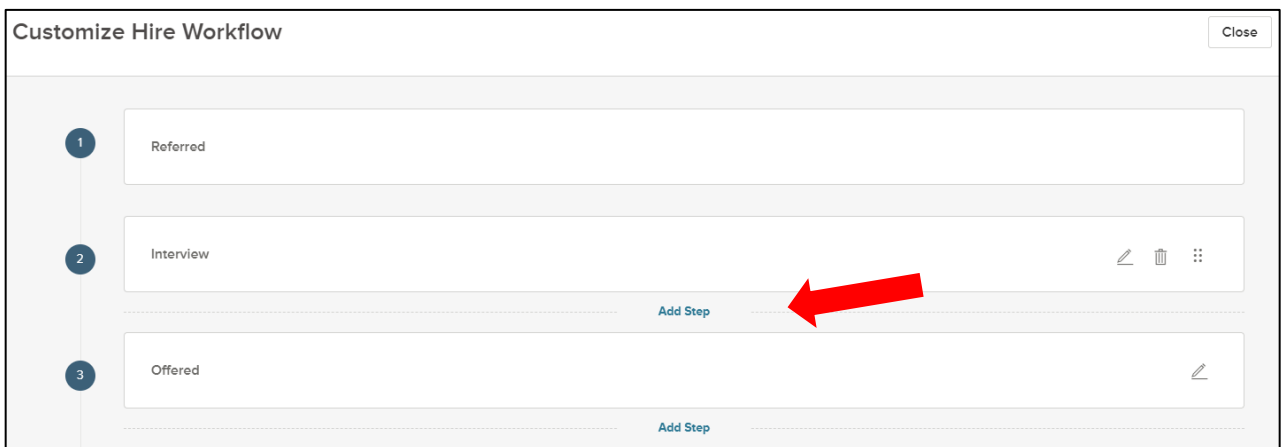
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From the Interview step, click . This is the step that immediately follows the referral of candidates.

- If you are using self-scheduling for only one round of interviews (either just phone, or just in-person, or just virtual), click on the pencil icon to change the name of the interview step to reflect the type of interviews you are conducting (i.e. phone, in-person, or virtual).

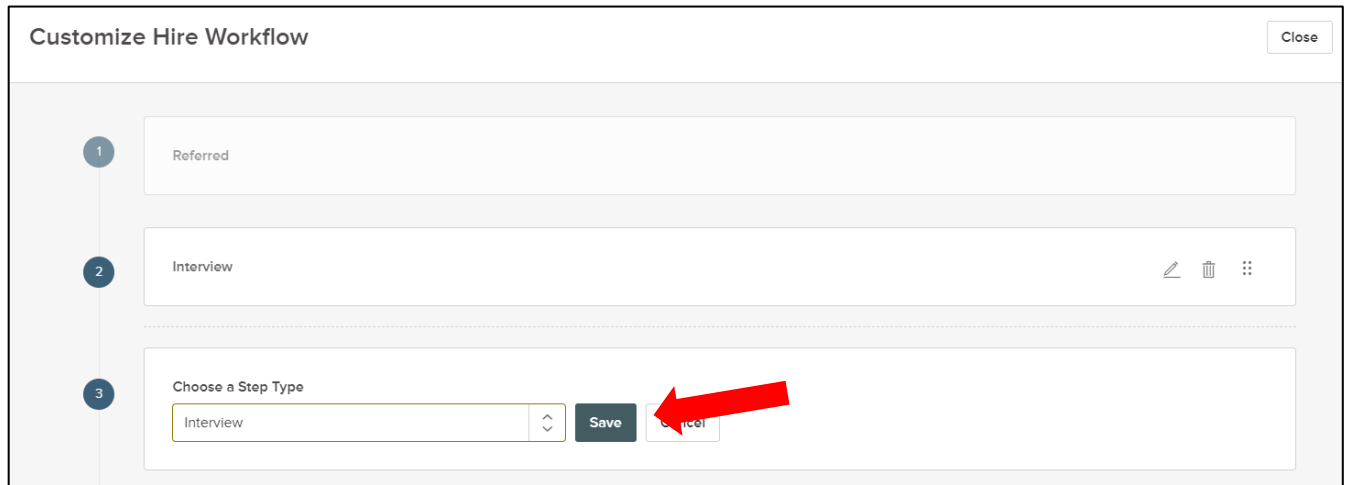


- If you are using self-scheduling to conduct more than one round of interviews (i.e. phone and in-person), you will need to add a workflow step by clicking Add Step below the existing Interview step.

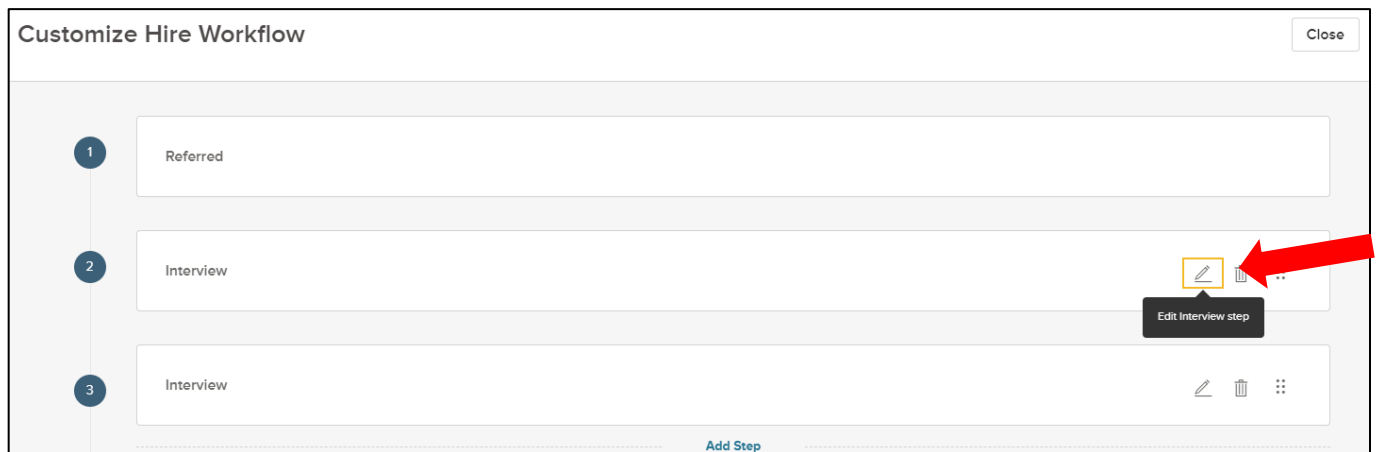


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Click Save.



You will see two Interview steps. Click  on the first Interview step.



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In the Step Details screen of the Interview step show below, change the name by adding Phone (or in-person or virtual) to the Name field.

Employees who will conduct interviews should be added to the Raters field as shown below. These raters will receive an email notification confirming when an interview is scheduled, which will include a link to add the interview date and time to their Outlook calendars. (**Please Note:** Raters will see a task on their dashboard when an interview is scheduled; however, no action is needed related to this task, as the task will disappear once the candidate is moved to a different status.)

Click Save & Continue.

If applicable, repeat this process to rename the second interview step (i.e. to be called in-person interview or second interview, etc.).

Please Note: If you do not want to use the calendar integration, no other changes should be made to this screen beyond adding Phone to the Name field.

Interview

Cancel Save & Close Save & Continue

1. STEP DETAILS X 2. SCHEDULING ✓

Step Details

* required fields are marked with asterisk

Name *

Phone Interview

Display Status to Candidate As

Raters

Rummel, Jordan

Entered item does not exist

Comment

Evaluate Using

Pass/Fail

Star Rating

Percentage

Scale

5 Stars

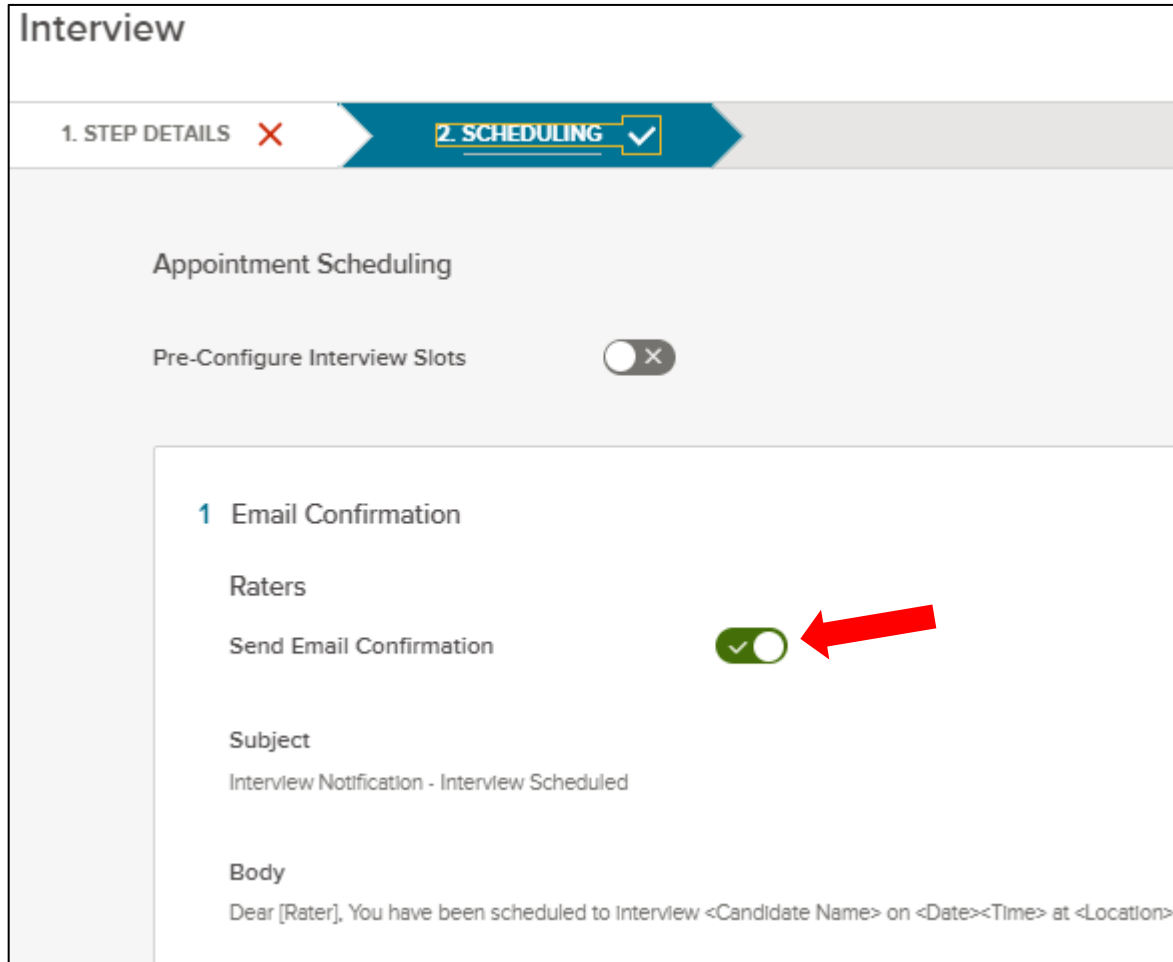
10 Stars

Pass Point

★★★★☆ 3 Stars

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The Email Confirmation field should remain enabled, unless you are not using calendar integration. If you are not using calendar integration, then you should disable the Send Email Confirmation by sliding the button to the left to turn off the functionality of sending email confirmations.



The screenshot shows the 'Interview' configuration page. At the top, there are two tabs: '1. STEP DETAILS' with a red 'X' and '2. SCHEDULING' with a blue checkmark. Below the tabs, the 'Appointment Scheduling' section is visible. Underneath, there is a 'Pre-Configure Interview Slots' toggle switch that is currently turned off. The main content area is titled '1 Email Confirmation' and includes the following fields:

- Raters**
- Send Email Confirmation**: A green toggle switch with a checkmark, indicated by a red arrow pointing to it from the right.
- Subject**: Interview Notification - Interview Scheduled
- Body**: Dear [Rater], You have been scheduled to interview <Candidate Name> on <Date><Time> at <Location>

In the Pre-Configure Interview Slots field, slide the button to the right to start the process. Do not slide the Allow Candidate Self-Scheduling button at this time because it will immediately allow candidates to begin scheduling their interviews. This should not be enabled until you are ready for candidates to self-schedule.



This screenshot shows the 'Interview' configuration page with the '2. SCHEDULING' tab selected. The 'Appointment Scheduling' section is visible. The 'Pre-Configure Interview Slots' toggle switch is now turned on (green with a checkmark), indicated by a red arrow pointing to it from the right. The 'Allow Candidate Self-Scheduling' toggle switch remains turned off. In the top right corner, there are 'Cancel' and 'Save & Close' buttons.

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In the Select Location(s) field, choose the appropriate interview type: In-person Interview, Phone Interview, or Virtual Interview, and click Done.

Interview

1. STEP DETAILS ✓ 2. SCHEDULING ✕

Pre-Configure Interview Slots

Allow Candidate Self-Scheduling

* required fields are marked with asterisk

1 Select Location(s) *

Start typing to find a location...

2 Select Available Dates *

October 2019

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

Select Location(s)

1 records are selected. Select all 16 records Clear selection

<input type="checkbox"/>	Location Name	Address
<input type="checkbox"/>	A&M Trainee - Phone Interviews	613 North Street , Harrisburg, Pennsylvania...
<input type="checkbox"/>	Capitol Police Phone Interviews	501 N. 3rd Street Suite 70 E, Harrisburg, Pe...
<input type="checkbox"/>	ESDA Interviews	613 North Street Room 311, Finance Buildin...
<input type="checkbox"/>	ESDA Phone Interviews	613 North Street Room 311, Harrisburg, Pen...
<input type="checkbox"/>	Health and Welfare	625 Forster St 2nd Floor West, Harrisburg, ...
<input checked="" type="checkbox"/>	In-person Interview	Interview details will be emailed. To Be D...
<input type="checkbox"/>	Loysville Youth Development Center	10 Opportunity Drive Administration Buildin...
<input type="checkbox"/>	North Central Secure Treatment Unit - Admissions ...	1 State Hospital Drive Admissions Building,...
<input type="checkbox"/>	North Central Secure Treatment Unit - Green Buildi...	1 State Hospital Drive Green Building, Dan...
<input type="checkbox"/>	North Central Secure Treatment Unit - Reed Building	1 State Hospital Drive Reed Building, Danvi...

Items per page 10 Showing 1 - 10 of 16 items

Select all the dates you want to offer for interviews. After all the dates are selected, choose the interview times, add durations, and time between interviews.

2 Select Available Dates *

October 2019

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

October 14, 2019

October 15, 2019

October 16, 2019

October 17, 2019

October 18, 2019

3 Select Times

Start Time * 8:00 AM

End Time * 5:00 PM

Duration * 30 min

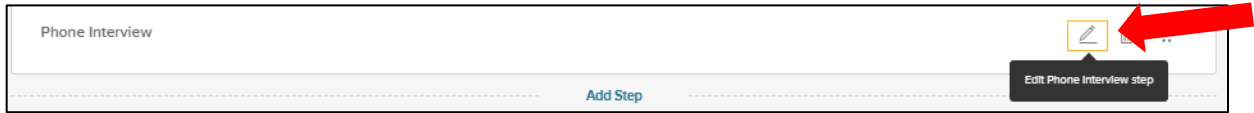
Time Between Slots * 15 min

Remove Time between slots 15 min

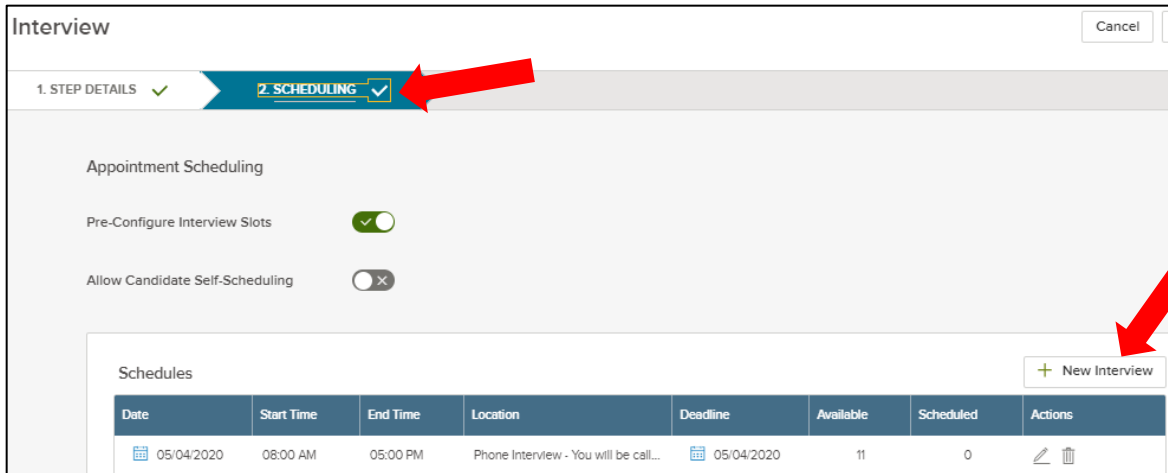
Eastern Time (US & Canada)

Please Note: If the interview times vary from one day to the next, select the first date and times, add durations and breaks between interviews, and select Save & Close. This will return you to the customize workflow screen.

From the customize workflow screen, click on the  at the phone interview step.



From the Interview screen, click on the Scheduling tab and then click on the New Interview button. Choose the location, your next interview date and times, add durations and breaks between interviews, and select Save & Close.



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In the Self Schedule Deadline field select the last date that applicants are allowed to schedule their interview date/time. Add any breaks throughout the day to account for timeframes when you are unable to conduct interviews, such as during meetings and lunch. This will prevent applicants from being able to schedule interviews during these defined breaks. Select Save & Close when finished.

Please Note: If the Self Schedule Deadline field is left blank, applicants will be able to continue scheduling interviews until all the interview timeslots are gone.

Interview

Cancel Save & Close

1. STEP DETAILS ✓ 2. SCHEDULING ✓

4 Self Schedule Deadline

10/14/2019

5 Add Breaks

Starts Ends

9:30 AM 10:15 AM

Starts Ends

12:00 PM 1:00 PM

Starts Ends

2:00 PM 2:30 PM

Remove Break end time 2:30 PM

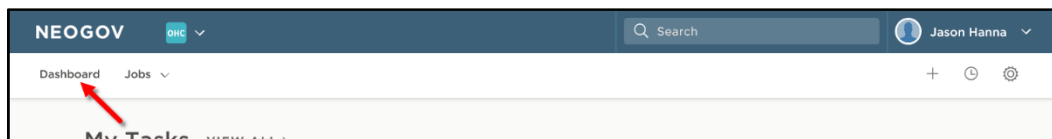
8AM	8:00 AM - 8:30 AM Slot 1
9AM	8:45 AM - 9:15 AM Slot 2
10AM	10:15 AM - 10:45 AM Slot 3
11AM	11:00 AM - 11:30 AM Slot 4
12PM	12:00 PM - 1:00 PM Break 2
1PM	1:00 PM - 1:30 PM Slot 5
2PM	2:00 PM - 2:30 PM Break 3

Schedule Interviews

It's now time to move your candidates to the interview step!

Steps to Schedule Interviews

If you're not already viewing your dashboard page, click on the Dashboard link in the upper left corner.



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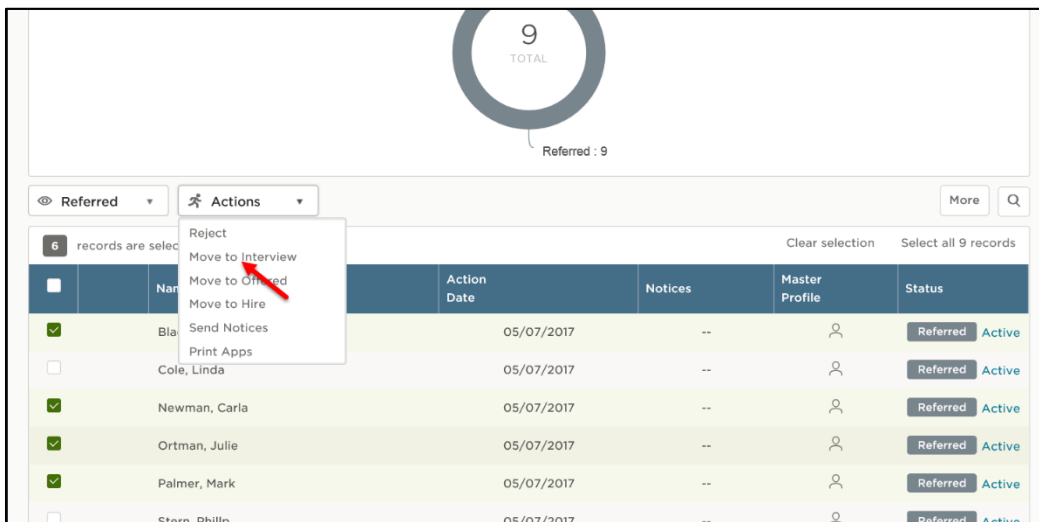
From the My Candidates section, click on the referred list for which you want to schedule interviews.



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

Showing 1 - 2 of 2 items

Select the candidates who will be moved to the interview step. From the Actions menu, click on Move to Interview (either phone interview, in-person interview, or virtual interview).



9 TOTAL
Referred : 9

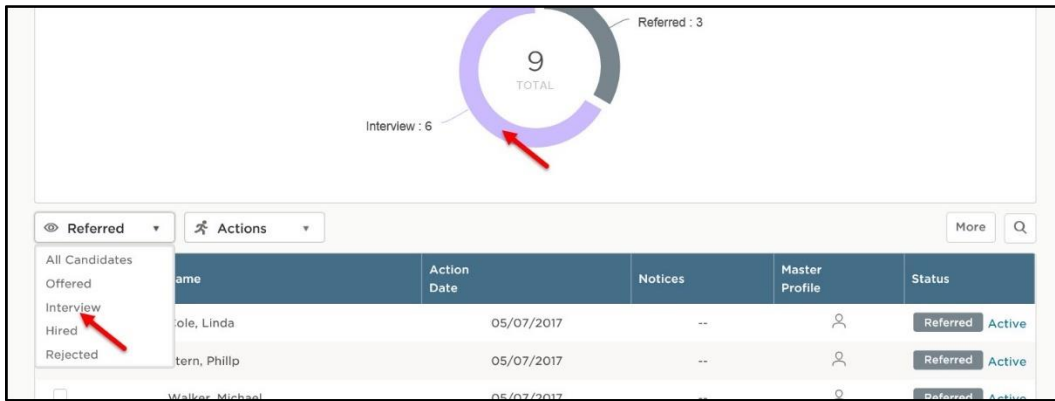
6 records are selected

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

Click OK to confirm moving the candidates.

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The selected candidates have been moved from the referred step to the interview step. To see the candidates, you can either click on the appropriate interview step on the donut chart, or from the dropdown menu, click on the appropriate interview step.

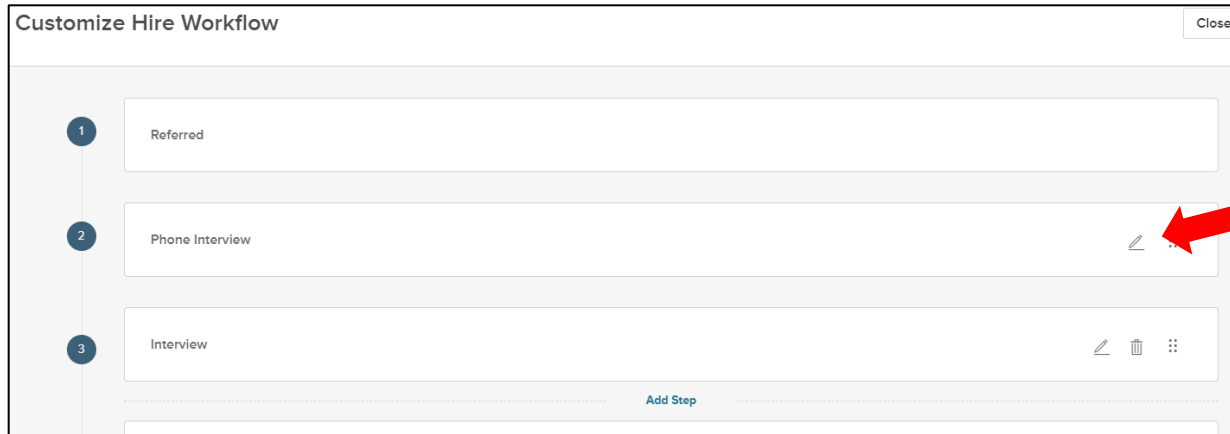


Now you are ready to allow candidates to see interview dates/times and schedule their interview!





Click on the Hire Workflow tab, then click on Customize Workflow.



In the appropriate interview step (phone, in-person, or virtual) click on the  .

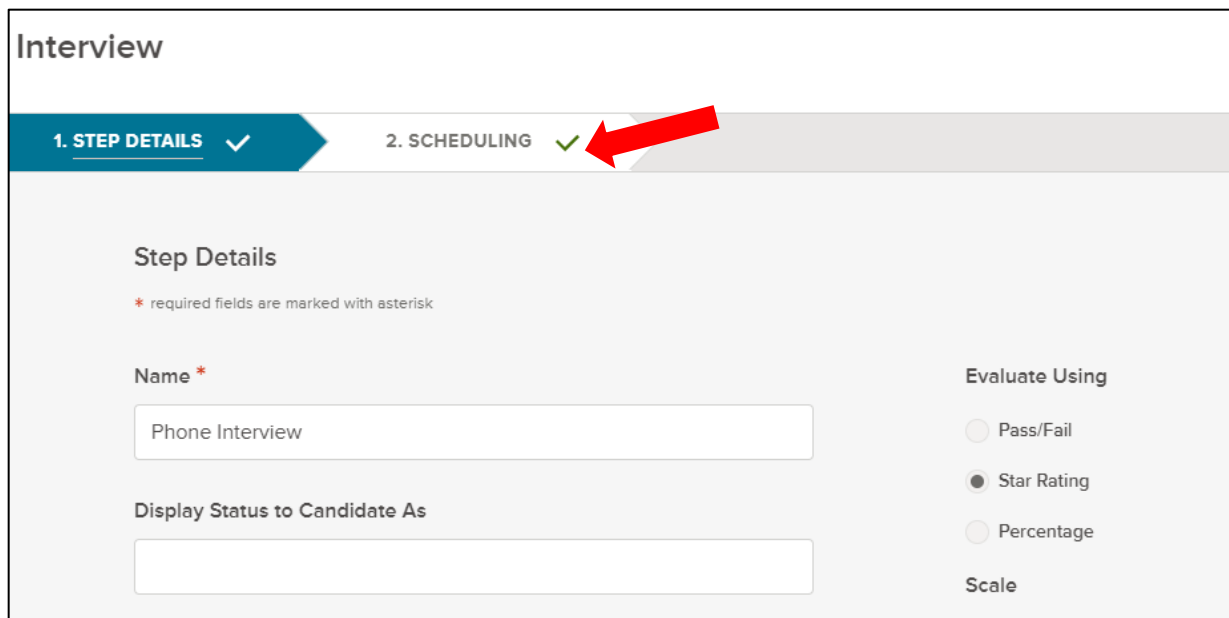


Customize Hire Workflow Close

- 1 Referred
- 2 Phone Interview 
- 3 Interview   

[Add Step](#)

Click on the Scheduling tab.



Interview

1. STEP DETAILS ✓ 2. SCHEDULING ✓

Step Details

* required fields are marked with asterisk

Name *

Display Status to Candidate As

Evaluate Using

Pass/Fail

Star Rating

Percentage

Scale

NEOGOV

Slide the Allow Candidate Self-Scheduling button to the right to turn it on. Once this setting is turned on, candidates will be able to see available interview dates/times for selection. Even though they can see these options, it is important that you send a notice to each candidate alerting them to schedule their interview.

Interview

1. STEP DETAILS ✓ 2. SCHEDULING ✓

Appointment Scheduling

Pre-Configure Interview Slots

Allow Candidate Self-Scheduling

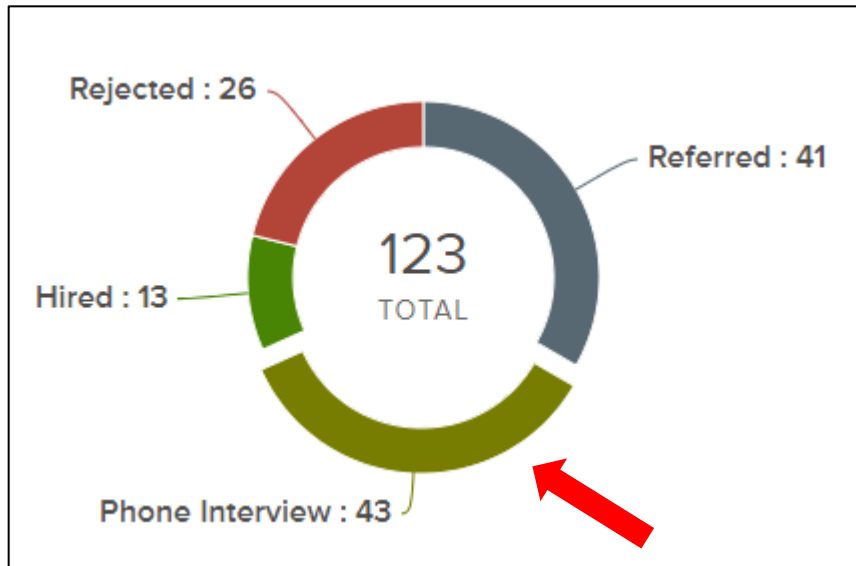
Schedules + New Interview

Date	Start Time	End Time	Location	Deadline	Available	Scheduled	Actions
01/07/2020	08:00 AM	05:00 PM	Phone Interview - You will be call...	01/07/2020	9	0	
01/08/2020	08:00 AM	05:00 PM	Phone Interview - You will be call...	01/07/2020	9	0	

Send a notice to each candidate alerting them to schedule their interview using the appropriate NEOGOV **OHC** notice template; "Phone Interview – Need to Schedule," or "In-Person Interview – Need to Schedule," or "Virtual Interview – Need to Schedule." When sending the notice template, it is critical that you remember to attach the "Candidate Instructions for Scheduling an Interview" document, which is housed on the NEOGOV Resources page. These instructions are intended to assist candidates as they go through the self-scheduling process.

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To monitor the status of your scheduled interviews, from the Dashboard click on the referred list. Next, click on the Phone Interview section of the donut chart.



Please Note: If you are not using calendar integration, scheduled interviews will not automatically populate to your Outlook calendar. However, you can export the candidate list to an excel spreadsheet to see who has scheduled an interview and who has not. To do this, select all candidates. Click on More, then Export to CSV.

A screenshot of a web application interface showing a table of candidates. The table has columns for Name, Unsubscribed, Phone, Action Date, Vet Indicator, Date Vet Ind Assigned, County of Residence, Exam Score, Total Score, and three CS List Type columns. The first four rows are visible, each with a checkmark in the first column. A red arrow points to the 'More' button in the top right corner of the table.

<input checked="" type="checkbox"/>	Name	Unsubscribed	Phone	Action Date	Vet Indicator	Date Vet Ind Assigned	County of Residence	Exam Score	Total Score	CS List Type 1	CS List Type 2	CS List Type 3	Personnel Number
<input checked="" type="checkbox"/>	Stamm, Daniel A.	No	570-847-3162	10/28/2019	V	6/26/2019	49	100	110				
<input checked="" type="checkbox"/>	Afolabi, Olufunmilayo	No	717-982-7433	10/28/2019			22	100	100				
<input checked="" type="checkbox"/>	AMIN, BINTU J.	No	(717) 802-5579	10/28/2019			21	100	100				
<input checked="" type="checkbox"/>	Anderson, Eric C	No	717-601-1641	10/28/2019			22	100	100				