# FAC/AP NeoEd Workflow Guide

## Basic Navigation

You can navigate to different areas of the recruitment including;

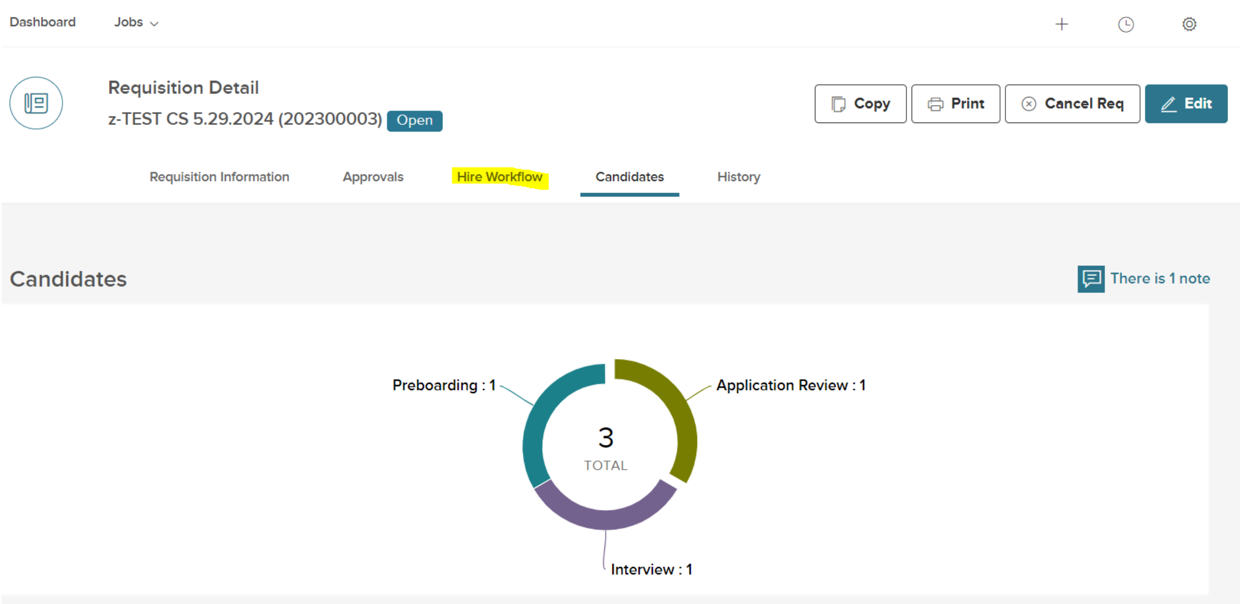
**Requisition Information –** to look back on the requisition details

**Approvals –** to view approvals that your requisition went through

**Hire Workflow –** to customize how your applicants will flow through the recruitment process.

**Candidates –** See picture above, you can see a snapshot of where your candidates are at in the recruitment process after being referred by our office. This is where you would also move applicants from one step in the workflow to another (referred to interview), send out notices (emails), etc. This is where you will also find comments that HR has made when referring candidates (any notes about contact deadlines, processes, etc. You will see the icon highlight below on the candidates tab if Human Resources has left a note for your department.

**History –** This tab allows you to view history of how the applicant has moved in the OHC requisition/recruitment.




**The Hire Workflow tab and Candidates tab will be available when the requisition is in an 'Open' status. If you are not able to see these tabs that indicates the requisition is not in a supported status for these tabs; such as the approved and draft status.**

**The Hiring Manager listed on the requisition will receive an email from info@neoed.com when an application(s) has arrived (email example pictured below). The Hiring Manager is responsible for moving applicants through the steps listed in the Hire Workflow. The committee will not be able to see the applications until you move them into the Application Review status AND have added the committee members to the workflow.**

*---*---*---*---*---*---*---*---*---*---*---*---*---*---*---*---*---*
PLEASE DO NOT REPLY TO THIS EMAIL
If you reply to this email, your reply will *NOT* be read. Instead,
please contact the individuals listed at the bottom of this email
if you have questions.
*---*---*---*---*---*---*---*---*---*---*---*---*---*---*---*---*---*

Dear Simon,

One or more candidates have been placed on the Referred List for the following Exam Plan/Requisition:

Job Title: Accountant
Requisition: 00027 Comments: Here are your top candidates for the Accountant opening.

This referred list has been sent to the department representatives that you have designated. To ensure fairness for all candidates in the hiring process, please review the referred list carefully and report any potential conflicts of interest that you may have to your manager.

To view the candidates, please go to https://secure.neogov.com/insight/login.cfm

If you have any questions regarding this recruitment, please contact:

Julia Russell (Originator)
jrussell@neogov.com
555-555-5551

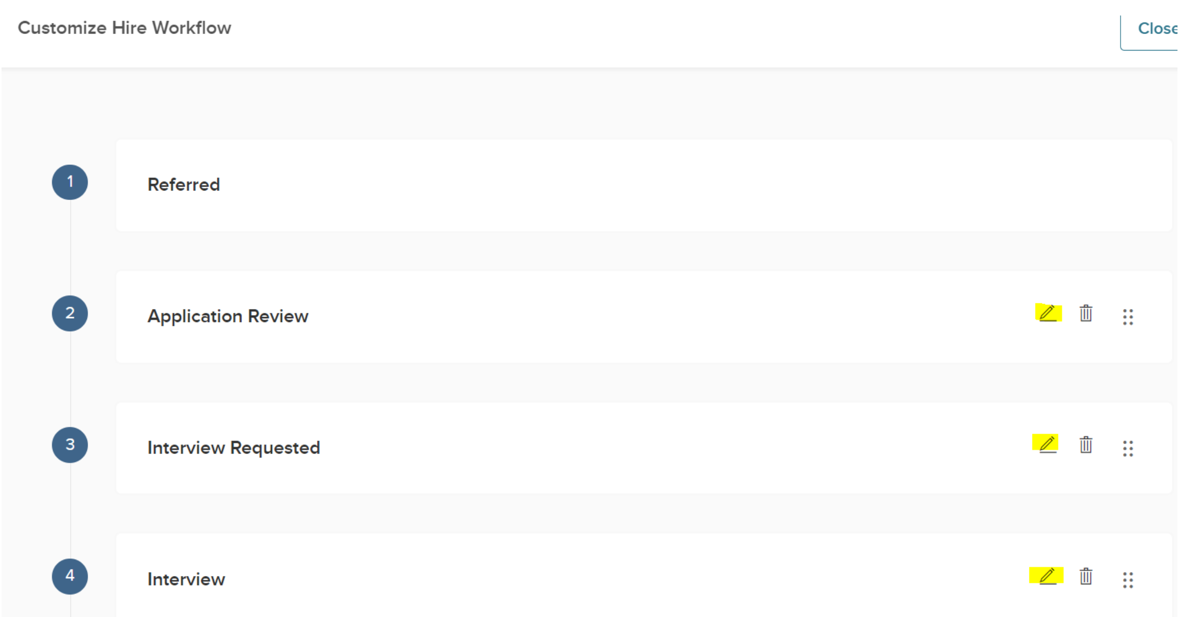
-- OR --

Brenda Gourvitz (HR Analyst)

# Customizing the Hire Workflow

The hire workflow will need customized for each requisition. To do this navigate to the Hire Workflow tab, and click Customize Workflow. You workflow should include the steps pictured below.


The hiring manager will need to customize the following steps; Application Review, Interview Requested, and Interview. To do this click the pencil icon associated with the step.

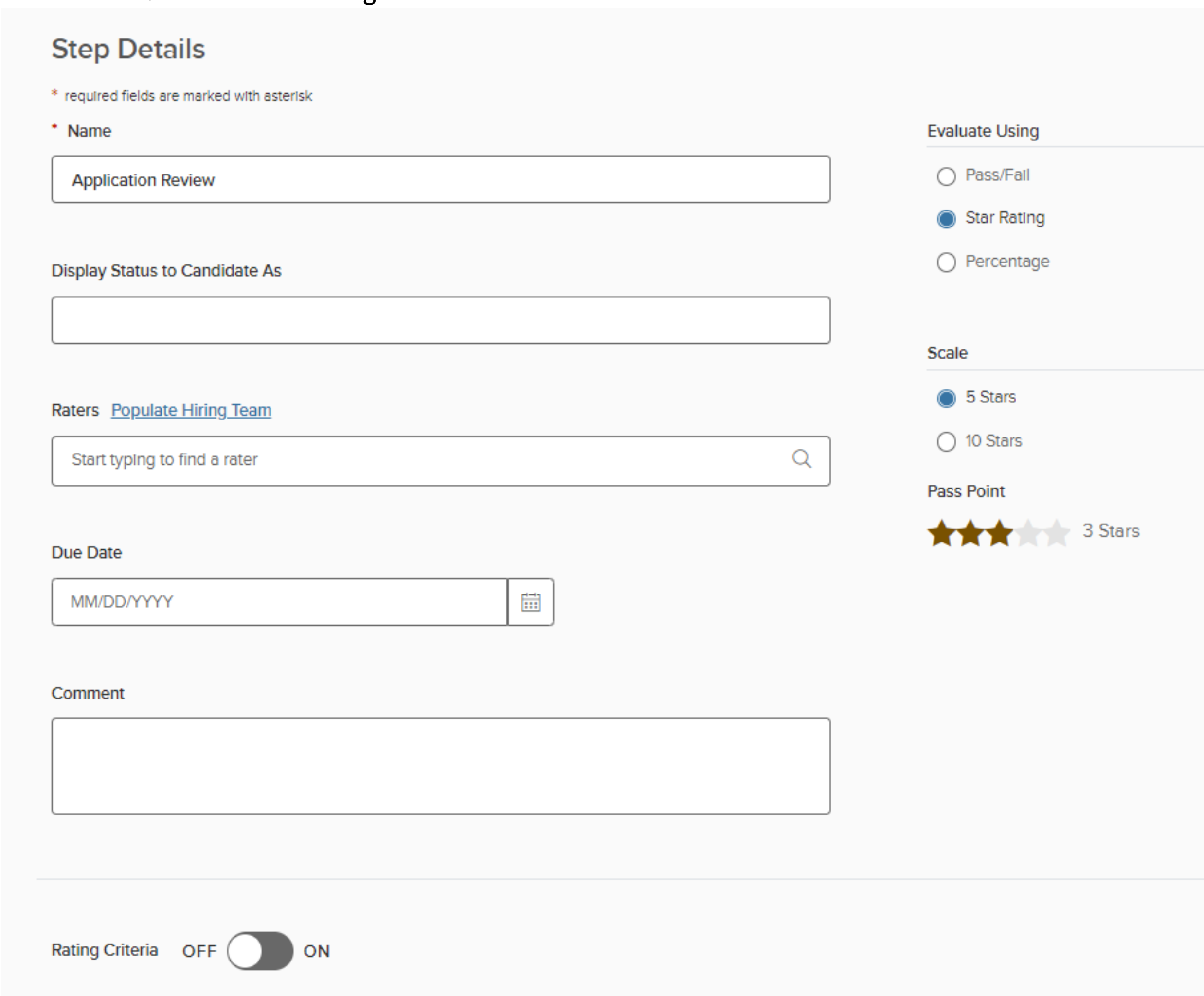



**In the Edit Function of the Application Review Step You Can:**

- Populate the Hiring Team. This will pull those listed within the search/interview committee members field on the requisition.
- Display Status to Candidate As: This is what shows to the applicant. You can customize this per Job, but exercise caution. "Application Under Review" is a good option, or just leave blank.
- Adjust the Rating Scale: Default is 5 star scale, where 3 is passing. Can be customized with on- screen options. Ratings below 3 stars would not be eligible for interview.
- Add Rating Criteria: On/Off toggle button. Off by default. If activated, this allows the committee

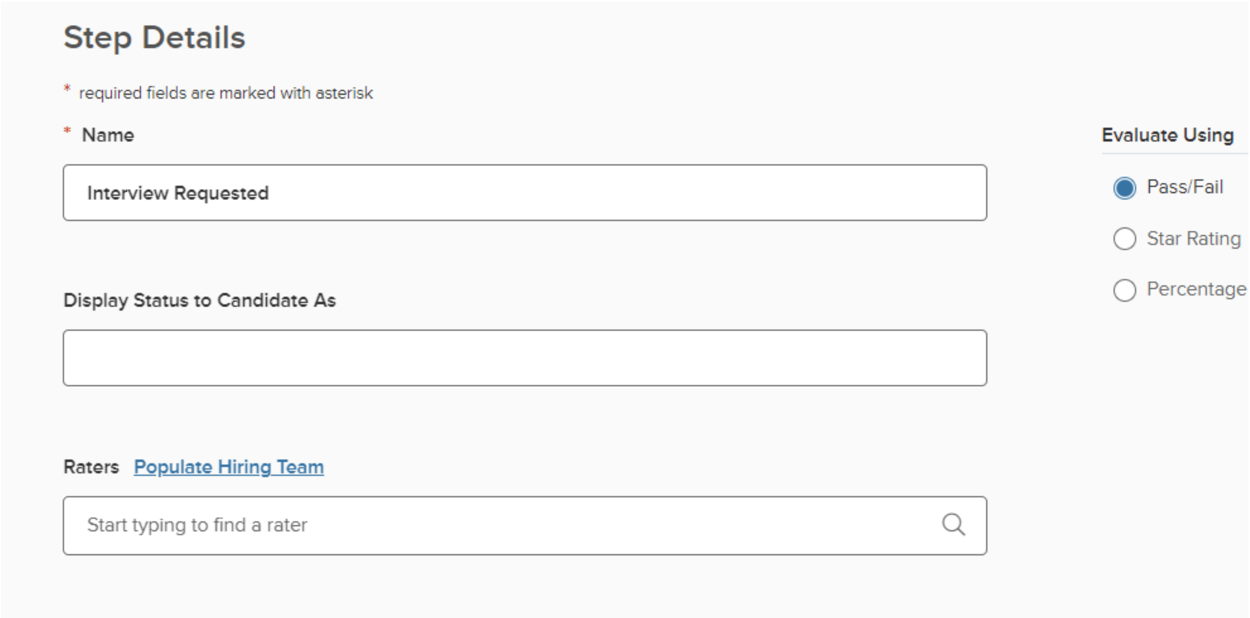
to give separate ratings based on specific criteria from the qualifications (e.g. Education, Publications, Grant Funding). You can leave this "off" and use a single holistic rating if the committee prefers. If used:

- Name the criteria (e.g. Education)
- Describe what the Committee Members should be looking for (adding the relevant minimum qualification language here is a great start)
- Click "add rating criteria"




**In the Edit Function of the Interview Requested Step You Should:**

Using the search box (magnifying glass icon) in the raters field add Ashley Followell and Arianne Smith. Select Save and Close. You can do this customization at the same time you customize the Application Review Step.




**In the Edit Function of the Interview Step You Can:**

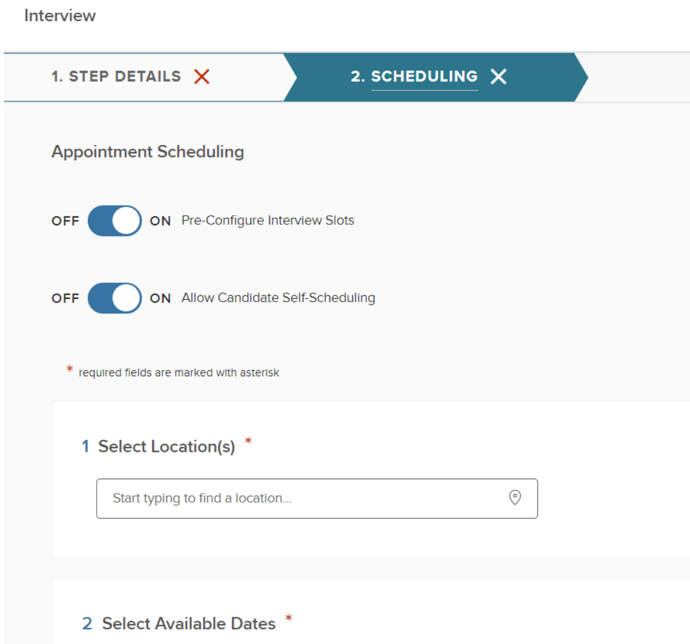
Step Details (Step 1):

- Display Status to Candidate As: This is what shows to the applicant. You can customize this per Job, but exercise caution. "Application Under Review" is a good option.
- Click "Populate Hiring Team". Should be a simple button click that imports the search committee from the Req.
- Rating Scale: Default is 5 star scale, 3 is passing. Same options as the Application Review step.
- Rating Criteria: On/Off toggle button. Off by default. Same options as the Application Review step.

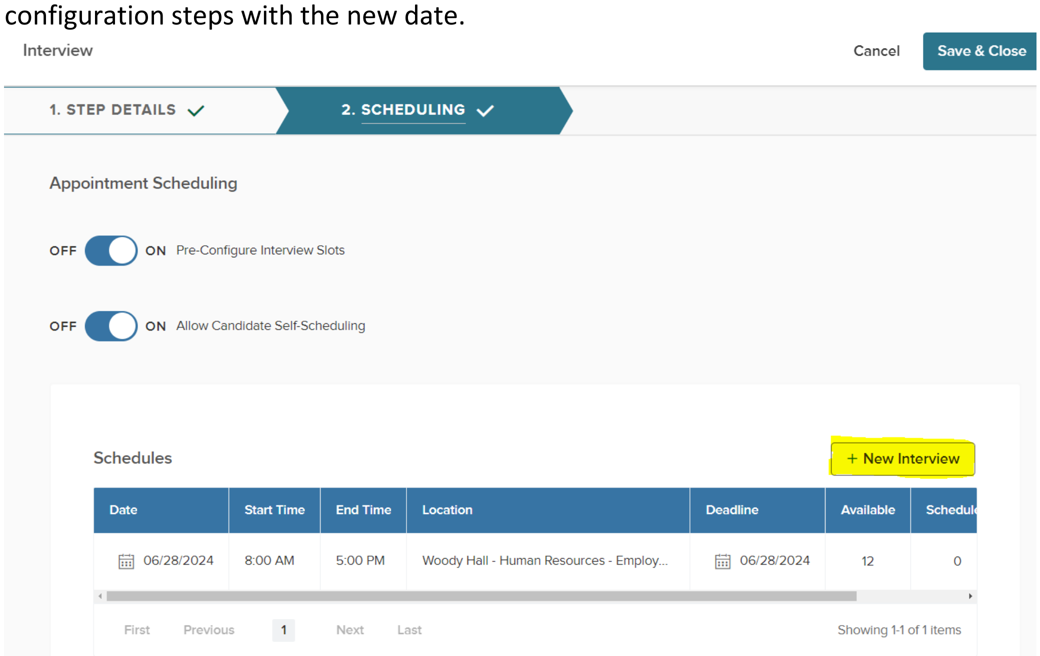
Scheduling (Step 2):

- Pre-configure Interview Slots is "off" by default.
- Allow Candidate Self-scheduling is also "off" by default. You have to enable Pre-configured time slots to access this feature.
- If you do not want to use self-scheduling or pre-configured interview slots, save and close this screen and skip the next bullet point.
- If you want to utilize the Self-Schedule feature and/or pre-configure your interview schedule:
  - Toggle both the Pre-Configured Interview Slots and Allow Candidate Self - Scheduling to On. Fill out the interview date(s), start and end time of the interview day, breaks, interview duration, etc. Once your done entering the information select 'Save & Close'.
    - Select Available Dates. Click the dates on the calendar you want to have interviews on.
    - Select times. This area lets you choose the start and stop time for the whole interview block, the duration of individual interviews, and any buffer time between slots.
    - Self-schedule deadline: This is the response deadline for the candidate to schedule their interview.
    - Add Breaks: If you want to build in a lunch break or some down time in the interview schedule, do that here.
    - Rater email confirmation: This is "on" by default. This will send a

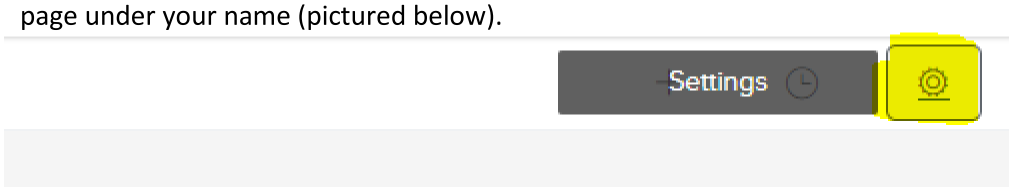
notification to the search committee members with interview information (interviewee, date, time, location) when an interview is scheduled.



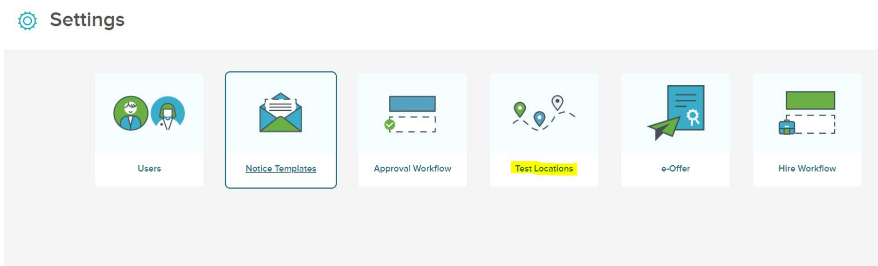

- If you need to add a new interview date with differing start time, breaks, etc then you would go back in to the interview step by using the edit button and select 'New Interview'. This will prompt you to complete the same interview configuration steps with the new date.




- Locations: If your interview location is not yet populated in the 'Select Location(s)' You will need to navigate to the settings gear at the top right of the page under your name (pictured below).



Select ‘Test Locations’. Make sure to search for your location before adding a new one.




- Once the applicant has self-scheduled, they will appear in the workflow as “scheduled” and it will display the date and time of their interview. The committee would then carry out the interviews.

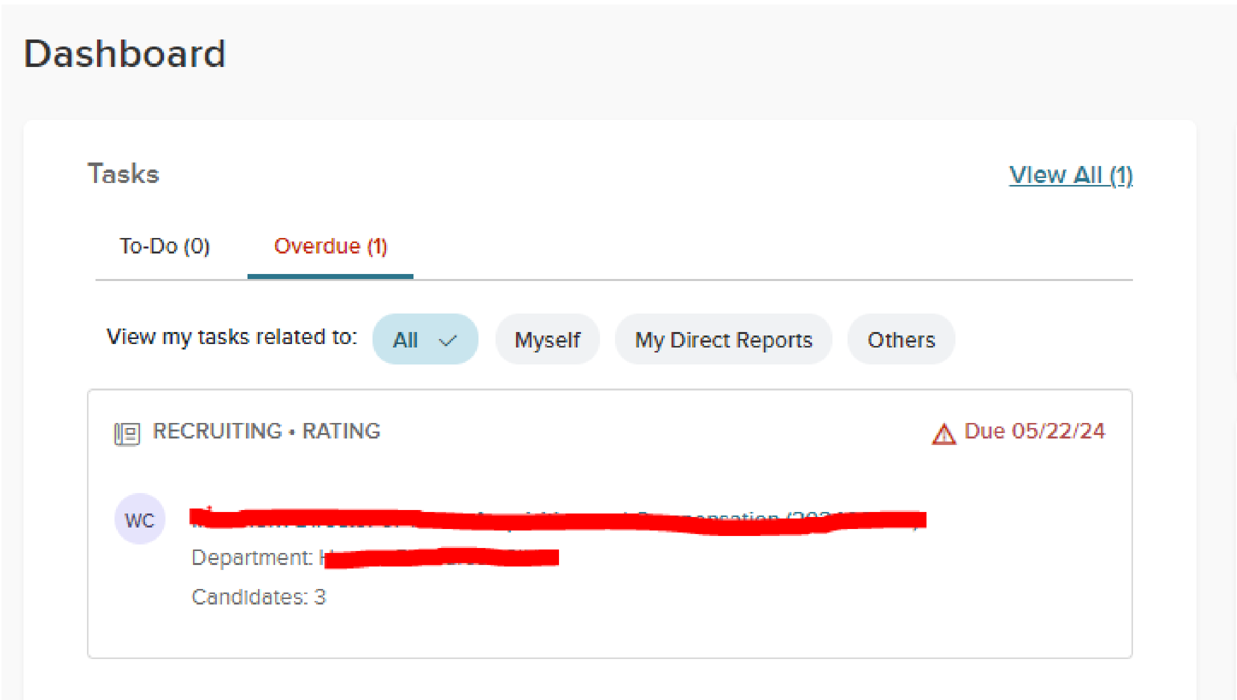
## Moving the Candidates Through the Hire Workflow Steps

The candidates will automatically land in the referred status/step when they apply. It is the hiring managers responsibility to move each applicant through the appropriate workflow steps. The first step will be Application Review.

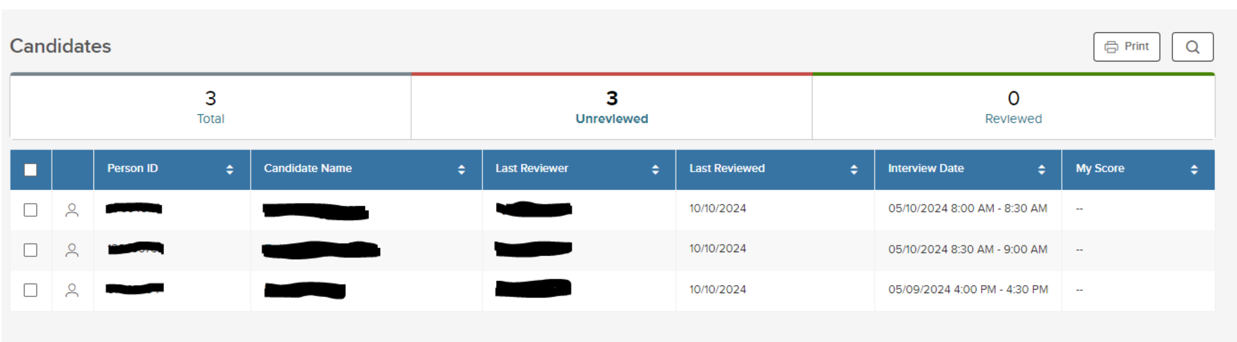
**Application Review Process:**

Once the Hiring Manager moves applicants into this step the Committees will carry out these steps themselves, but may need help or guidance along the way.

- When the HM has moved applicants into an Application Review status, the committee members (CMs) should get an email telling them they have applicants to review. They will also see this as a Task on their NeoEd dashboard.
- The dashboard will have a link in the Task widget that will take them directly to those applicants.
- Once there, the CM will see a list of names and 3 columns: Total, Unreviewed, and Reviewed applications. This will help them keep track of who they have or have not reviewed, which is especially helpful if they are reviewing applications as they arrive (rather than in bulk after the deadline).
- The CM will click on any name to start, which will show them the applicant’s information, responses to questions, and attachments. The CM should review each of these attachments and compare them to the minimum and preferred qualifications as published.
- The CM should assign a rating to each applicant.
  - Default is a 5 star scale, where 3 is passing. The HM may have changed this to another format; if so, consult with the HM or Hiring Administrator on what is needed.
  - The CM can also add comments in a text box, which are visible to other CMs, the HM, and Affirmative Action. These comments are retained as part of the applicant’s record on this Requisition.
  - The CM can see the ratings of other CMs.
  - The ratings of each CM are averaged for the applicant, giving a final overall rating. If using the default setup, ratings below 3 stars would not be eligible for interview.




*(Screenshot of the committee member task item)*

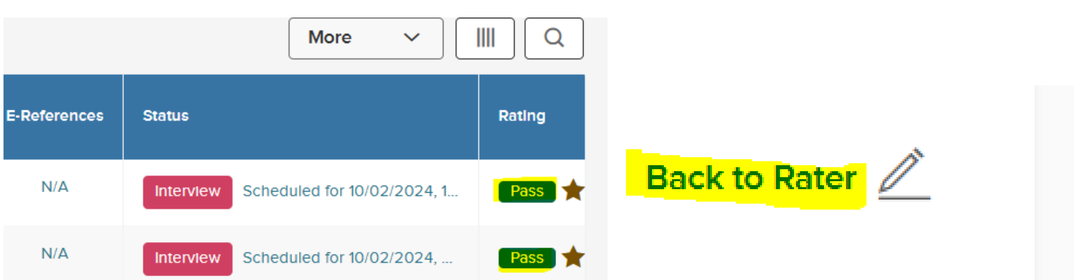



*(Screenshot of the candidate review layout for the search committee members)*

**Edit Ratings:**

**If a search committee member/rater needs to edit their rating the hiring manager will have access to do this. Navigate to the candidates tab of the requisition and click on the rating. If the current rating is passing you would click on the green box that says ‘Pass’. If the current rating is failing you would click on the red box that says ‘Fail’. Once you do this it will open up a fly-out showing the different ratings completed by the raters. Navigate to the rater that needs to update their rating. Click on ‘Back to Rater’.**

*Screenshots for this process are below*




*(Screenshots showing how to send a rating back to the rater for editing purposes)*

The hiring manager will need to update the status of each applicant based on the committees review and notes. The Hiring Manager should work with the Committee Chair or Hiring Administrator as needed.

- The Non-Finalists: Move applicants in this group to the “rejected” status and assign an Inactivation Reason (formerly disposition code). This could be permanent or temporary, depending on the needs of the search. It does not automatically send a rejection email to the candidates.
- Finalists: Move these applicants from Application Review to Interview Requested.

**Interview Requested Process:**

Once the finalists are moved to the already customized Interview Requested Step. Affirmative Action will complete a review and move the finalists into the Interview status of the workflow. By moving the candidates into the Interview step, Affirmative Action has ‘Approved’ your Interview Request. **Do not move applications into the Interview status yourself, Affirmation Action will do this.**

**Interview Process:**

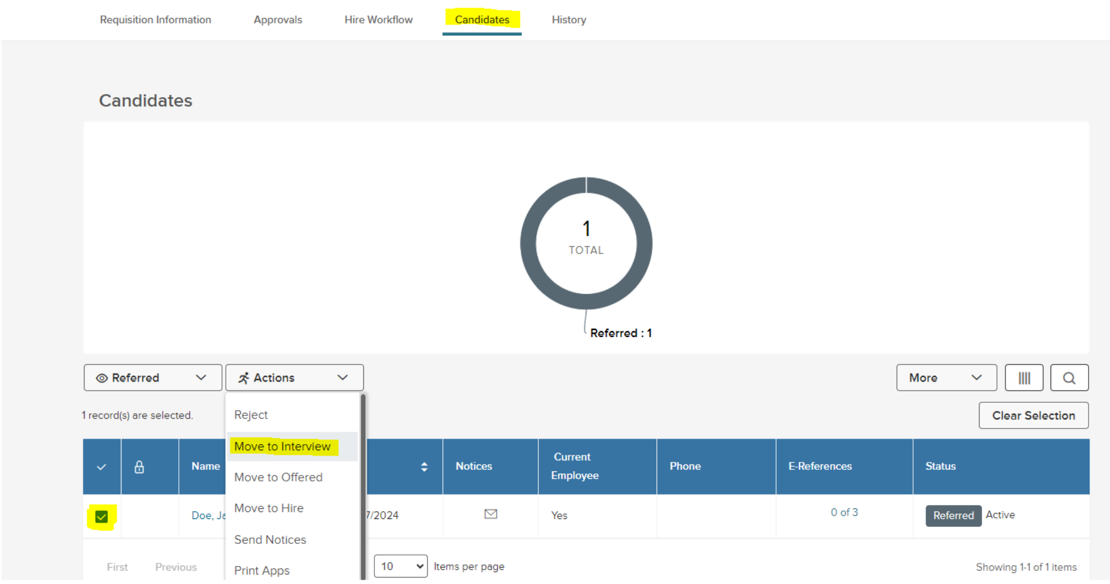
**Manual Interview Scheduling**

If you manually schedule interviews, you still need to reflect the actual time/date/location in the system. This is an important part of recordkeeping and audit protection for SIU and your unit. You can do this step after Affirmative Action moves the candidate into “interview status”.

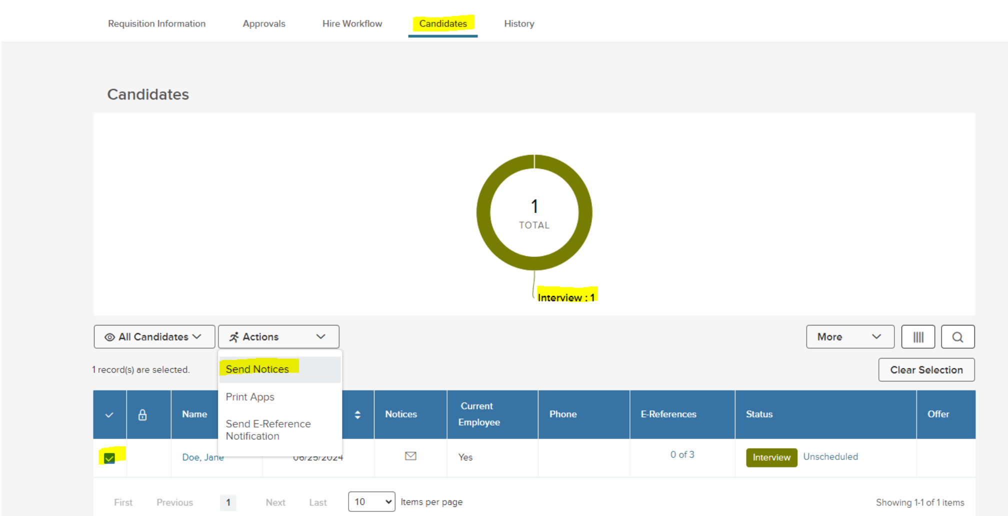
- The applicant will appear as “unscheduled” in the Candidates tab. Click that word to open an Interview Details flyout.
- The flyout will prompt you to note the interview details. Date, location, time, and interviewers. A schedule appears below that should show conflicts in scheduling with other finalists. **This is a record only, and does not automatically send an email notice to the candidate.** Once you save, the candidate will be in a “scheduled” status and will show the interview date and time in the workflow list.
    - You can send the candidate an email confirmation of their interview schedule. To do this:
        - click the checkbox next to their name in the workflow, and click the “actions” dropdown.
        - Choose “send notices”. This will open a flyout with a search box.
        - Click the magnifying glass to open another flyout with a list of notice templates. For now, “oral interview confirmation notice” is your best option.
        - When you click that, it will return you to the first flyout. Review the language and merge fields in the email. You may be able to customize the email by clicking the “override” button. If you do not have access to the override button and wish to change some of the text in the email please reach out to the Affirmative Action Office.
        - Click “send” in the upper right corner

**Utilizing the Self-Schedule feature in NeoEd**

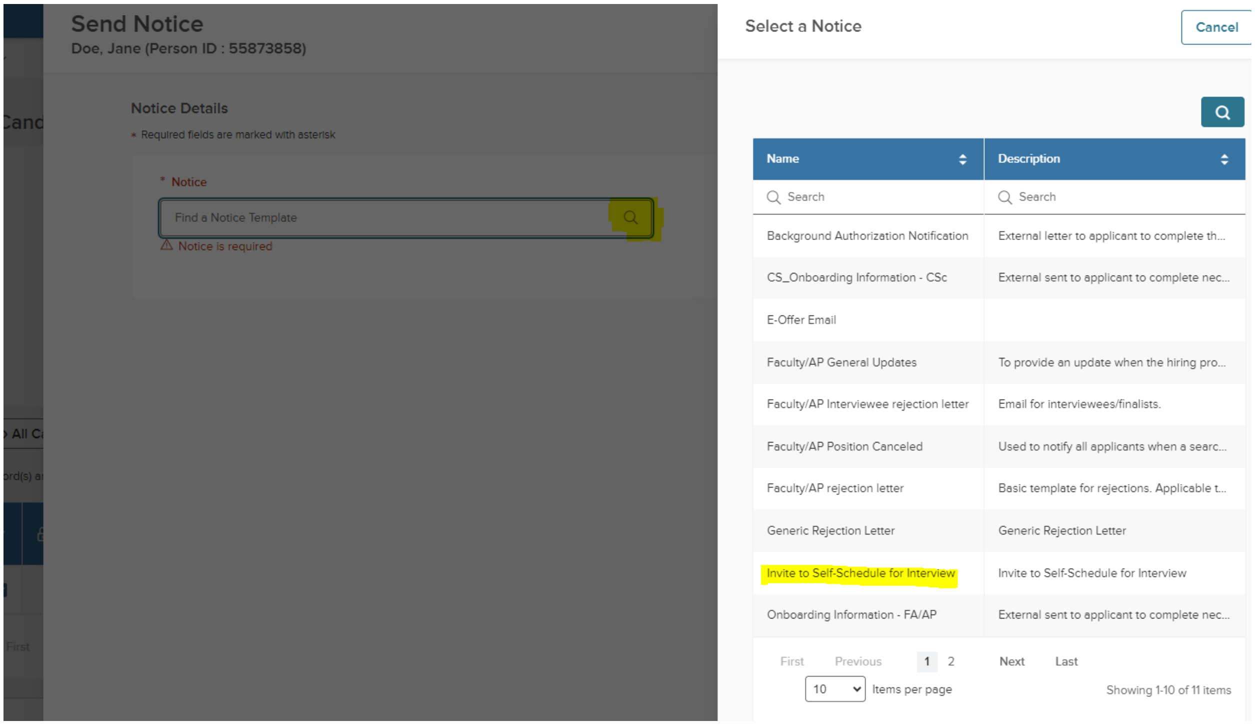
Once you are ready to send out the interview time slots available you will move the candidates from ‘referred’ to ‘interview’. This will give them access to select their interview date and time but they do not receive notification that this is available. You will need to send out a notice/email through NeoEd in order to notify them that this feature is available.



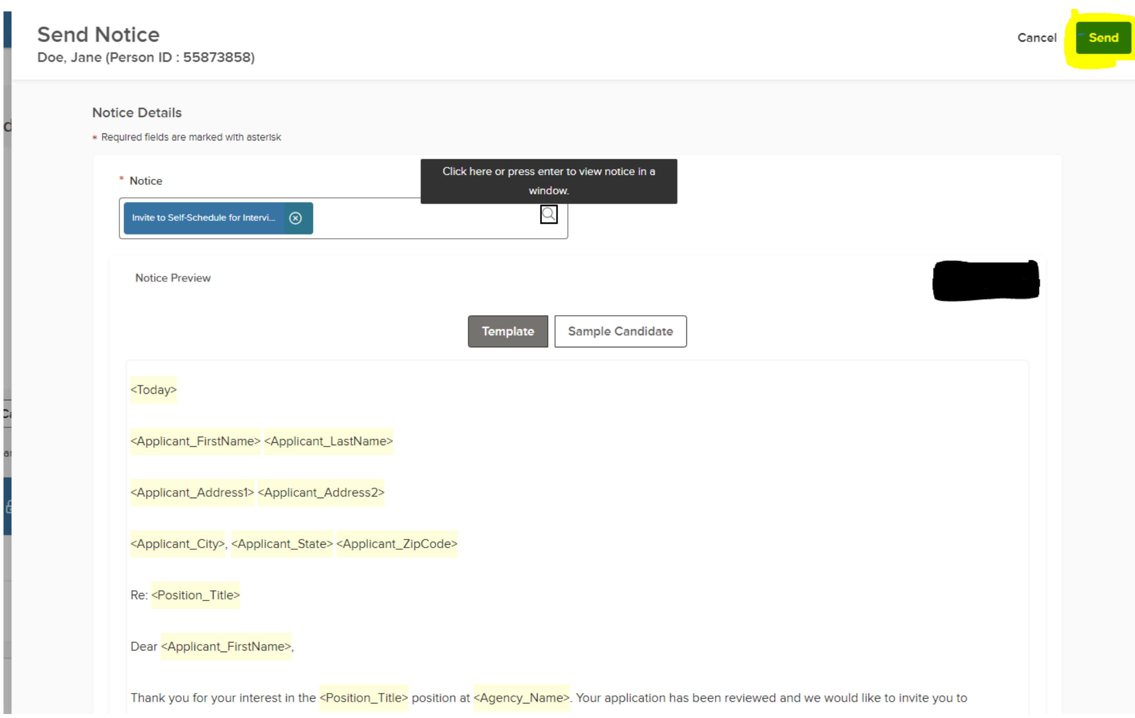

To send out the notice/email select the candidates in the interview step, under the actions menu select ‘Send Notices’.



Use the magnifying glass to select the email template 'Invite to Self-Schedule for Interview'




Once the template is selected it will pull up the email that will be sent, press send. As candidates schedule their interviews emails will be sent out to the raters (Interview committee) entered on the Interview step.




Once the applicant has self-scheduled, they will appear in the workflow as "scheduled" and it will display the date and time of their interview. The committee would then carry out the interviews.

**Post-Interview Updates and Candidate Offers**

After the interviews are complete, the committee should give information to the HM about which candidate(s) they want to hire, and why the others will be rejected. The HM should then update Neoed.

- Navigate to the Candidate tab of your requisition. View the applicants that are in Interview status.
- Move the interviewees who are not being hired at this time to the “rejected” status and assign an Inactivation Reason (formerly disposition code). This could be permanent or temporary, depending on the needs of the search. It does not automatically send a rejection email to the candidates.
- Move the intended hire into Offered status. This will open the Offer Approval Form. The Offer Approval is a combination of the old Hiring Proposal and NOA forms, and is the same for Faculty, AP, and Civil Service employment. Some fields are required, and some fields are situational or optional. Most of them function the same way they did on their legacy forms, and I’ve summarized the most common/important fields below. Note this form is still under revision and finalization by HR. If you have questions, please contact your Dean/VC office or Affirmative Action.
    - Offer Information (Page 1):
        - Offer date: The date you’re *making* the offer, usually today. This is not the start date.
        - Offer amount and Frequency: Generally a monthly salary offer, but annual or other amounts can be entered.
        - Expected start date: Please give enough lead time for approvals, acceptance, and onboarding. Preference is for the first day of a pay period when possible.
        - Acceptance Deadline: When the candidate must return their decision to the hiring unit. This will be shown on the email the candidate receives. Give enough time for routing and approvals. HR/Affirmative Action may reach out if we think it needs adjusted.
        - Justification for hiring outside the goal: Only when applicable. If you are not sure of your position’s hiring goal, contact Affirmative Action
        - Other terms and conditions of employment: You can use this field for a variety of things. Specific course numbers to be taught, workload percentages, background check clearance contingency…
        - Fields with “Partial Semester Payment Only” notes: For specific Faculty hiring situations. If you are not sure, contact PVCHiring@siu.edu.
        - Intent to reappoint for subsequent semesters: This field helps HR determine benefits eligibility for certain faculty hires. It is not binding to the unit or the employee, and it doesn’t guarantee future employment. The new employee would not see this field.
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        - Fields with “Partial Semester Payment Only” notes: For specific Faculty hiring situations. If you are not sure, contact PVCHiring@siu.edu.
        - Intent to reappoint for subsequent semesters: This field helps HR determine benefits eligibility for certain faculty hires. It is not binding to the unit or the employee, and it doesn’t guarantee future employment. The new employee would not see this field.

**Sending an Offer and completing Onboard paperwork**

After the Offer Approval is complete, you can **communicate the job offer to the candidate by phone or email.** Although you will see a “send e-offer” option in Neoed, we are not ready to being using this function yet! Please ignore it until we send additional instructions when the new features are ready to use.

After the candidate has accepted the offer, begin an Onboarding Packet for them and send it for them to complete. Detailed instructions and the Adobe Sign onboarding packet are available at https://neoed.siu.edu/siu-carbondale/faq/ under “How do I onboard a new employee after December 8, 2023…” and “How do I sign into Adobe Sign”.

To finish the process, please let Affirmative Action know when the new employee has started work. We will tidy up the recruitment in Neoed and finalize any loose ends at that time. Similarly, let us know if the candidate declines the job offer.