Civil Service NeoEd Workflow Guide

Basic Navigation of Your Recruitment

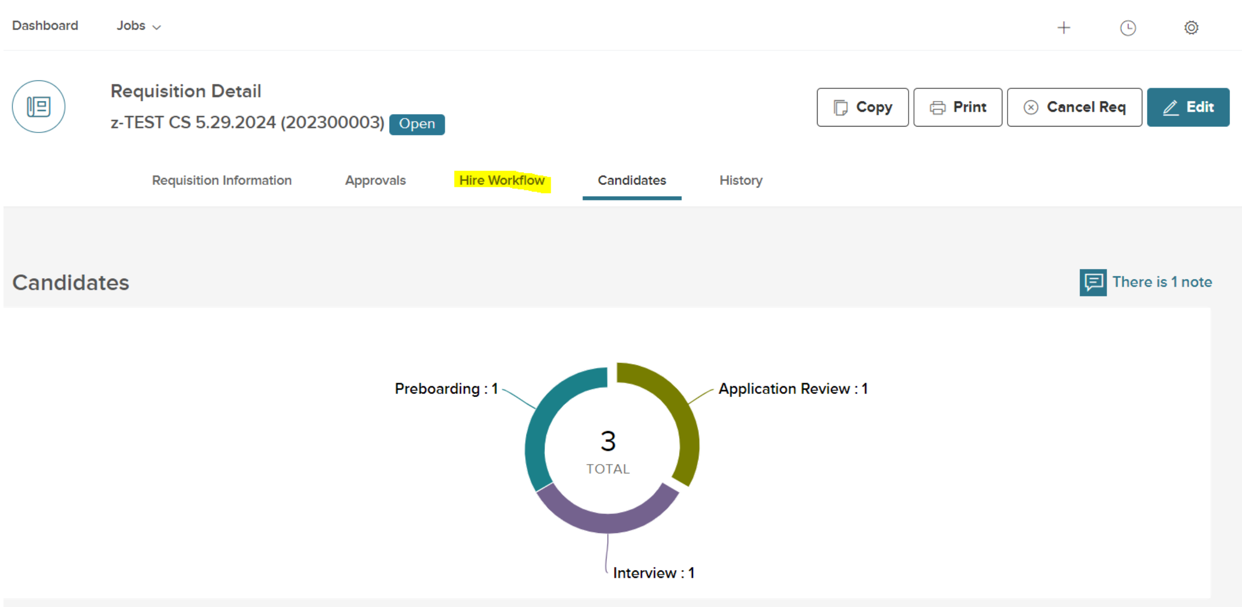
Requisition Information – to look back on the requisition details

Approvals – to view approvals that your requisition went through

Hire Workflow – to customize how your applicants will flow through the recruitment process. For Civil Service we recommend using the flow pictured below and deleting the other workflow steps that are used primarily for Faculty and A/P hires.

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 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 the hiring manager has customized the necessary workflow steps and move the candidates into the appropriate workflow step, either Application Review or directly into Interview step.

From: info@neoed.com <info@neoed.com>
Sent: [redacted]
To: [redacted]
Subject: Message From NEOED Insight: Candidate(s) Referred

[EXTERNAL EMAIL ALERT]: Verify sender before opening links or attachments.

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

Dear Renee,

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

Job Title: [redacted]
Requisition: [redacted]

Comments: Please use the guide sent in a separate email to utilize the self-scheduling feature for this search. Candidates were not given a deadline to contact your department to schedule. If you choose not to use the self-scheduling feature your department will need to reach out to each candidate individually to set up an interview date and time. As a good practice, if you are using the self-scheduling feature we recommend setting the self-schedule due date to allow for one week for applicants to schedule. Civil Service hires are not currently utilizing the 'Offered' status in NeoEd. Once your department is ready to make an offer please leave the candidate in the interview status and send an email to the HR Analyst (Heather Rich) requesting a salary calculation. PLEASE NOTE: All referred candidates must be given the opportunity to interview if they are interested in the position.

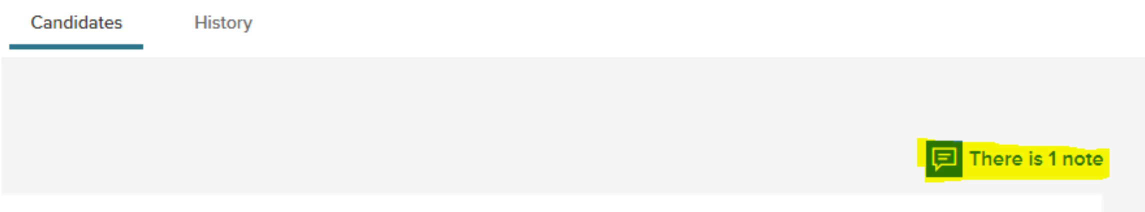
This referred list has been sent to the department representatives that you have designated. To ensure fairness for all candidates in the hiring process, please review the referred list carefully and report any potential conflicts of interest that you may have to your manager.

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

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

[redacted] Originator
[redacted]@siu.edu

If the HR Analyst has included any notes when referring candidates you would find them on the candidates tab. Click on the message symbol to view the note.



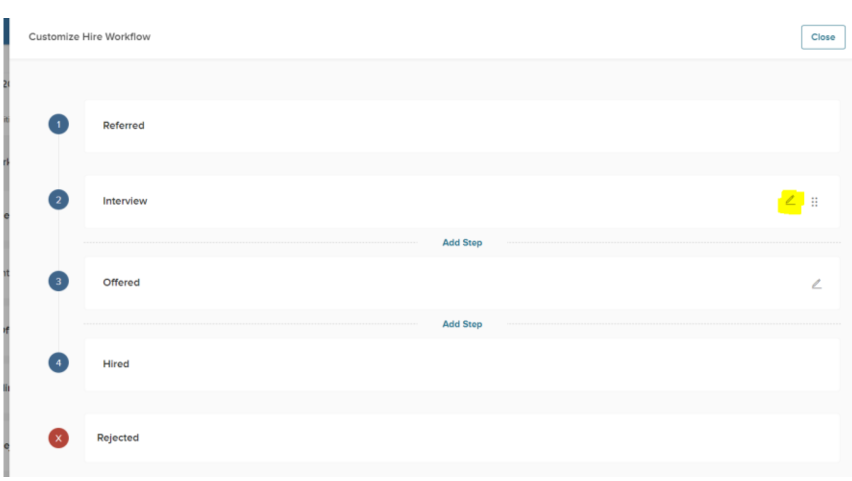
Customizing the Hire Workflow

The hire workflow will need customized for each requisition. For Civil Service we recommend using the flow pictured below and deleting the other workflow steps that are used primarily for Faculty and A/P hires.

To customize/edit the default workflow for the position you would navigate to the requisition, click 'hire workflow' and select the edit icon 

The following workflow steps will need customized (if used); Application Review and Interview

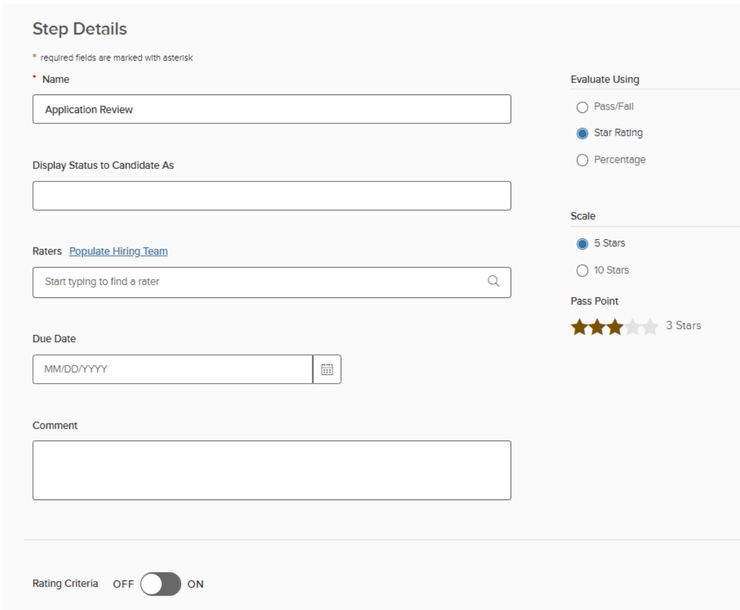
You can use the Application Review step and populate your rating teams within that step if you would like the interview committee members to see the applications prior to interviews being scheduled.



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.

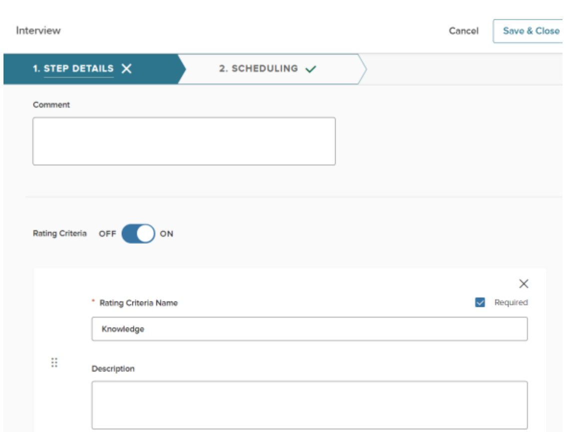
If using this step you will need to edit for every requisition/recruitment.



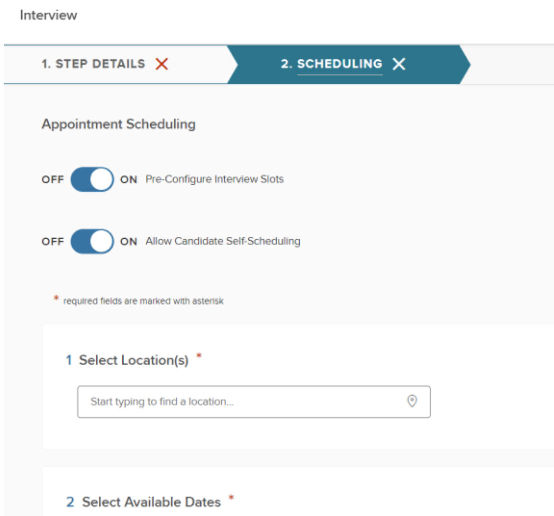
In the Edit Function of the Interview Step You Should:

- Populate the Hiring Team. This will pull those listed within the search/interview committee members field on the requisition.
- Adjust the Rating Scale: Default is 5 star scale, where 3 is passing. Can be customized with on-screen options.
- Enter the Four Rating Criterias: Knowledge, Experience, Special Training, Communication Skills
    - Name the criteria. (Those listed above)
    - Describe what the Committee Members should be looking for (adding the relevant minimum qualification language here is a great start)
    - Click "add rating criteria"

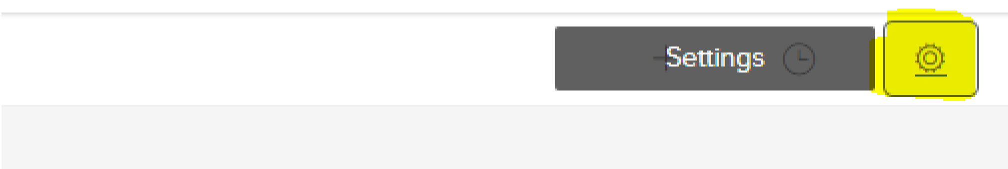
You will need to edit the Interview step for every requisition/recruitment. The information you will add is the raters (interview committee), rating criteria, and set up self-scheduling time slots if pre-configuring interview dates/time.



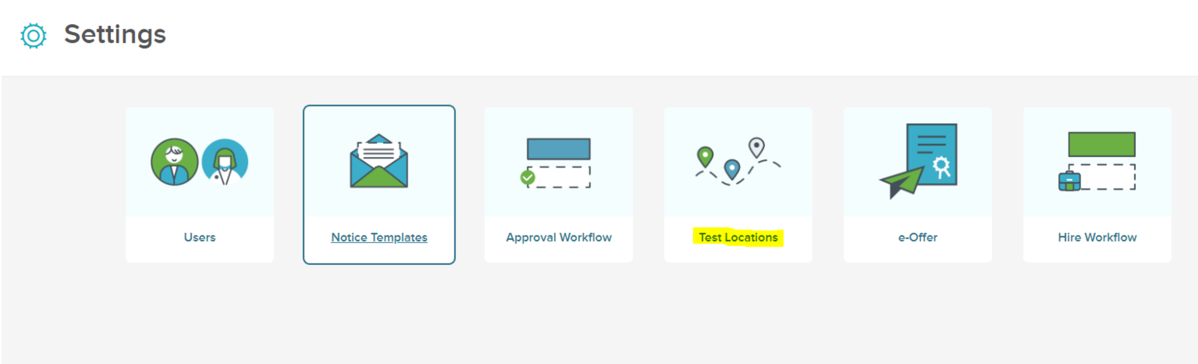
To Use Self-Scheduling Toggle both the Pre-Configure Interview Slots and Allow Candidate Self-Scheduling to On. Fill out the interview date(s), start and end time of the interview day, breaks, interview duration, etc. Once your done entering in the information select 'Save & Close'.



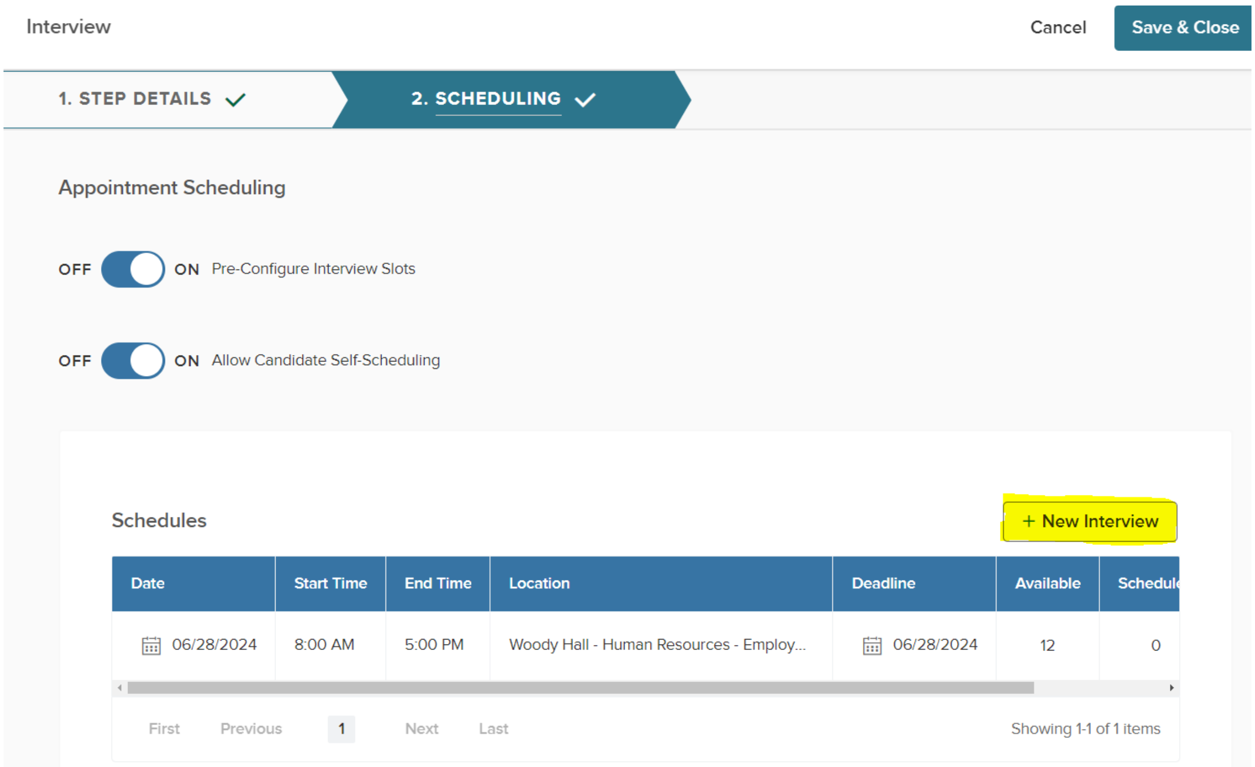
If your interview location is not yet populated in the 'Select Location(s)' You will need to navigate to the settings gear at the top right of the page under your name (pictured below).



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



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.



Moving the Candidates Through the Hire Workflow Steps

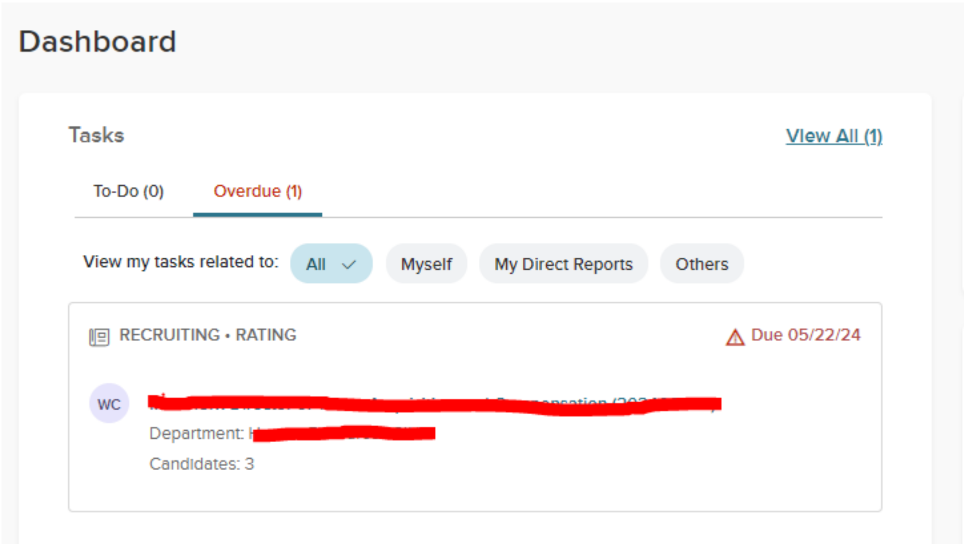
The candidates will automatically land in the referred status/step when they apply. It is the hiring managers responsibility to move each applicant through the appropriate workflow steps. The first step will be Application Review if your department chooses to use this step, otherwise they can be moved directly into the Interview Step. **Please keep in mind, all Civil Service applicants referred must be given the opportunity to interview if they are interested in the position.**

Applicants in the Application Review Step:

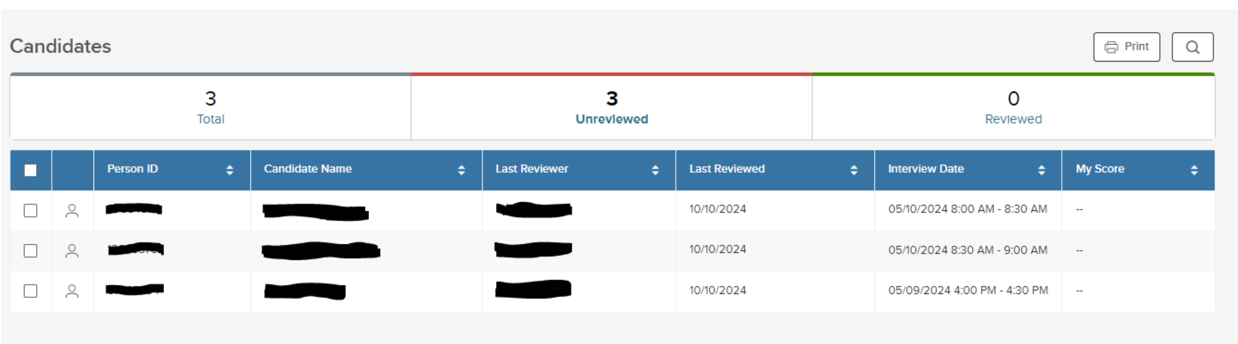
This will allow interview committee members to view the applications prior to interviews being scheduled. This should only be used as a first glance for interview committee members. All interested applicants should be moved to Interview for scheduling.

When the hiring manager has moved applicants into an Application Review status, the interview committee members 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.



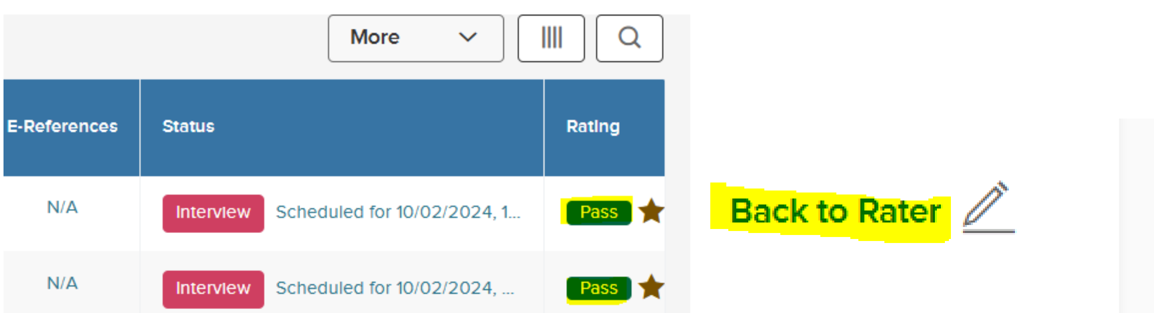
(Screenshot of the committee member task item)



Edit Ratings:

If an interview 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)

Interview Process:

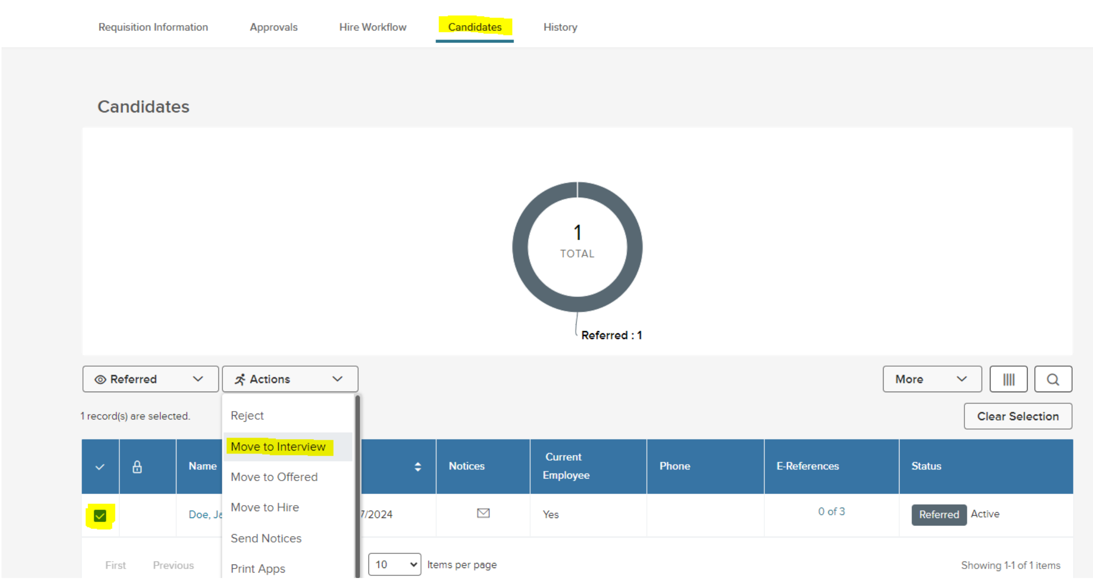
Manual Interview Scheduling

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.

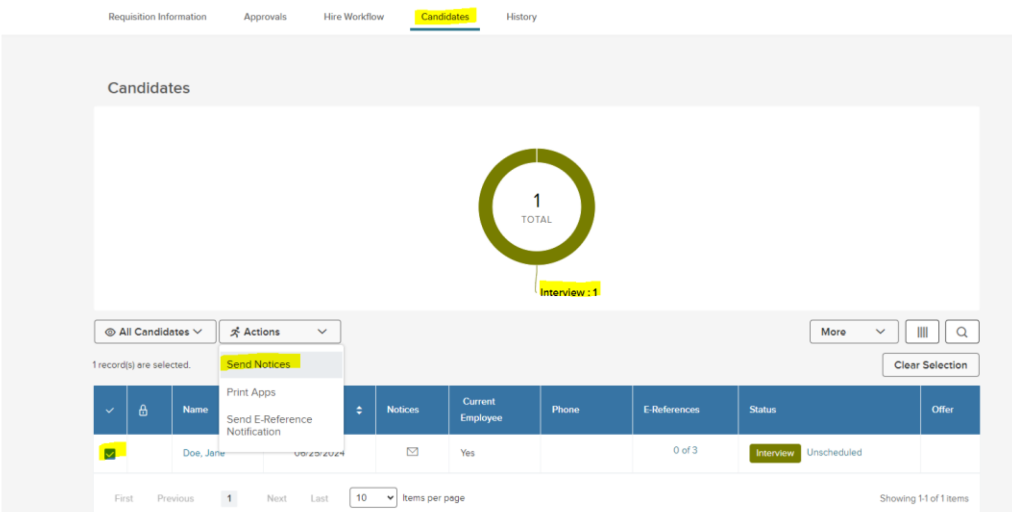
- The applicant will appear as "unscheduled" in the Candidates tab. Click that word to open an Interview Details flyout.
- The flyout will prompt you to note the interview details. Date, location, time, and interviewers. A schedule appears below that should show conflicts in scheduling with other finalists. **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. If you wish to change some of the language and do not have an 'override' button please reach out to Human Resources at 618-453-3369.
    - Click "send" in the upper right corner.

Utilizing the Self-Schedule Feature in NeoEd

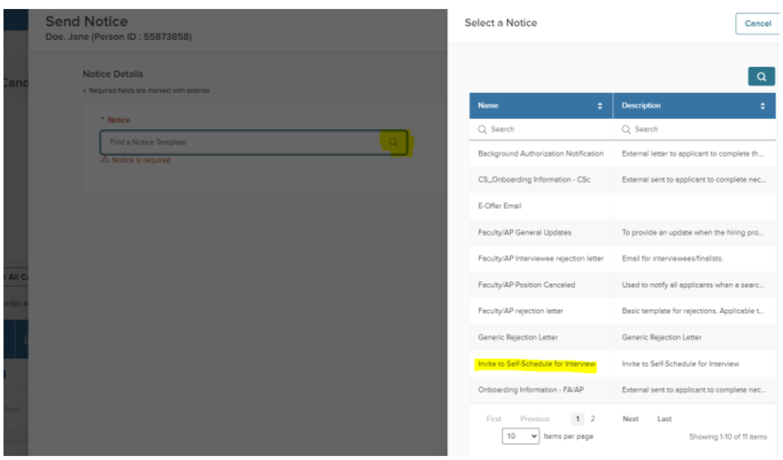
Once you are ready to send out the interview time slots available you will move the candidates from their current status/step to 'interview'. If the necessary customization has been completed prior to moving the candidates into this step it will give them access to select their interview date and time 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.



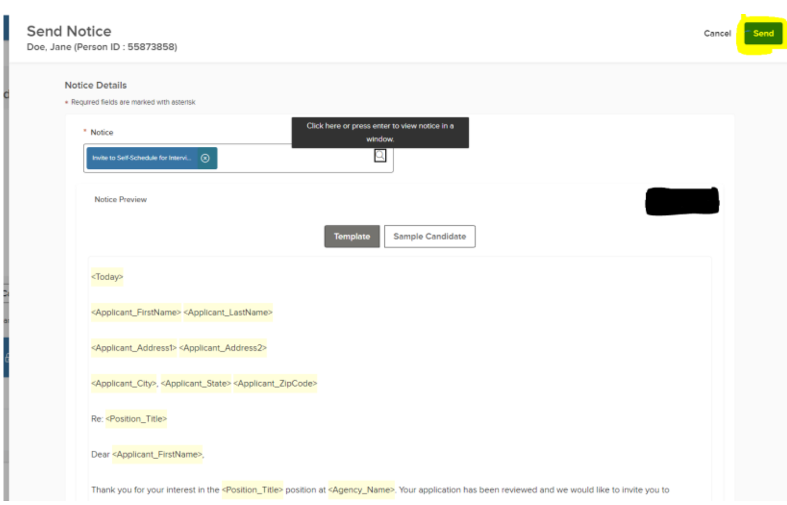
To send out the notice/email select the candidates in the interview step, under the actions menu select 'Send Notices'.



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. They're rating tasks will be conducted in the same manner as the Application Review step.



Offer Process:

Once your department is ready to make an offer please send the HR Analyst an email requesting a salary calculation. We are not currently utilizing the offer step within NeoEd for Civil Service hires. Once Human Resources gives you clearance to make the offer and the candidate accepts you will work with the HR Analyst on any hire paperwork that may be required.

When the candidate has accepted the position you will move them to hired within your OHC requisition candidates tab.