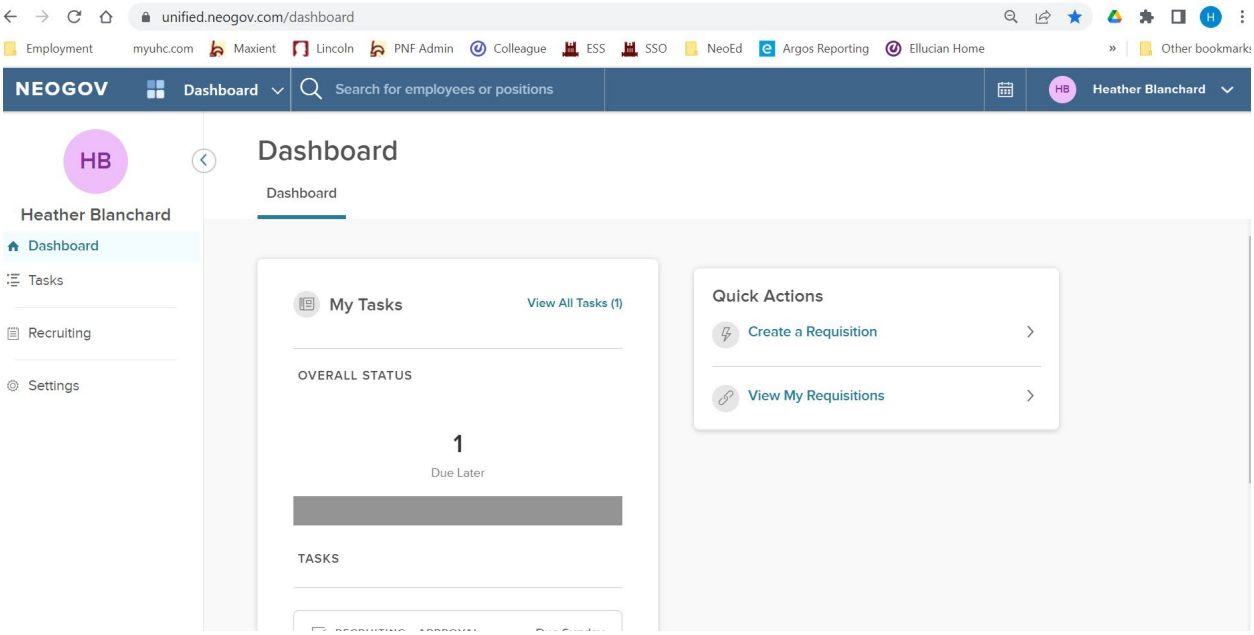
You can login to the Online Hiring Center from SSO. You will need to use your specific NeoEd/NeoGov login credentials. Your username will be your full loyno email address.

The OHC Dashboard will be your landing page once logged in.



Review the Referred List - Link to training video here.

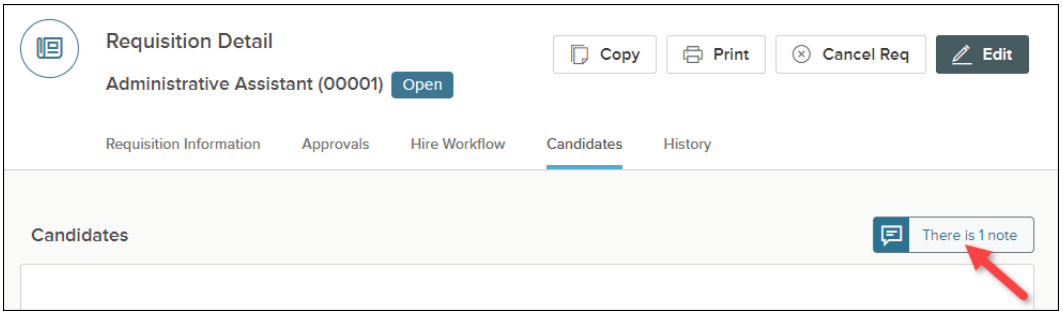
Up until now, you've been preparing to work with your referred list of candidates, e.g., schedule and/or confirm interview appointments, conduct interviews, enter results, etc. It's now time to have a closer look at the referred list.

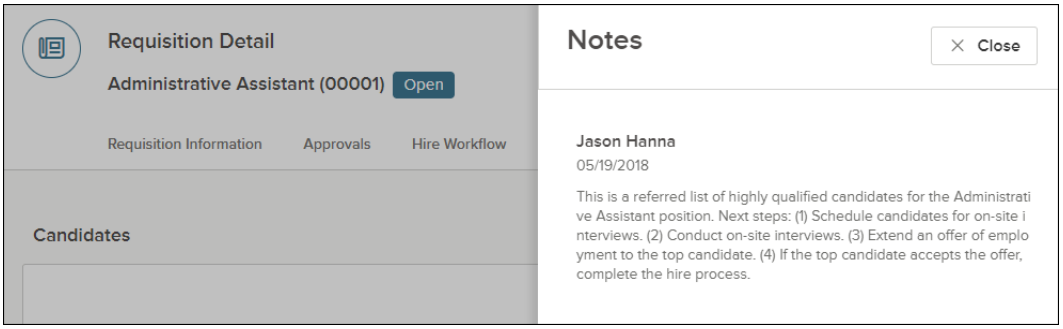
Steps to Review the Referred List

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

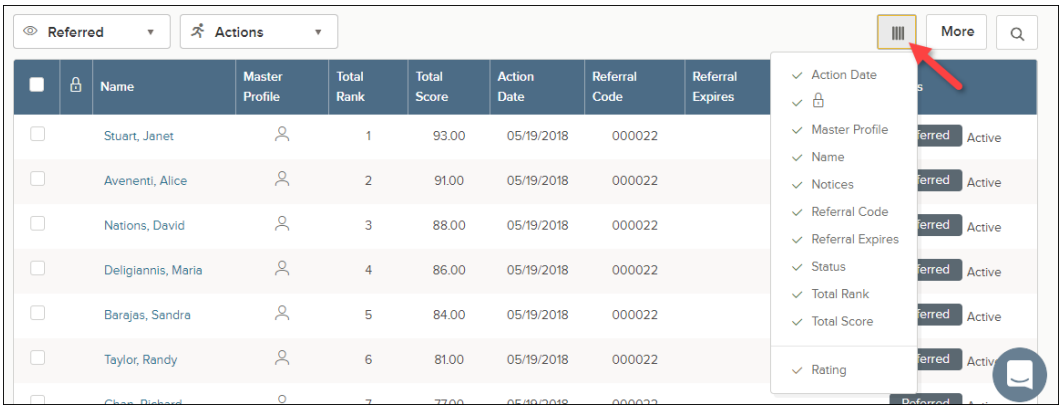
2. From the My Candidates section, click the referred list to review.

Note: If the HR staff member left one or more notes on the referred list for you, a button will display indicating the number of notes available to read.

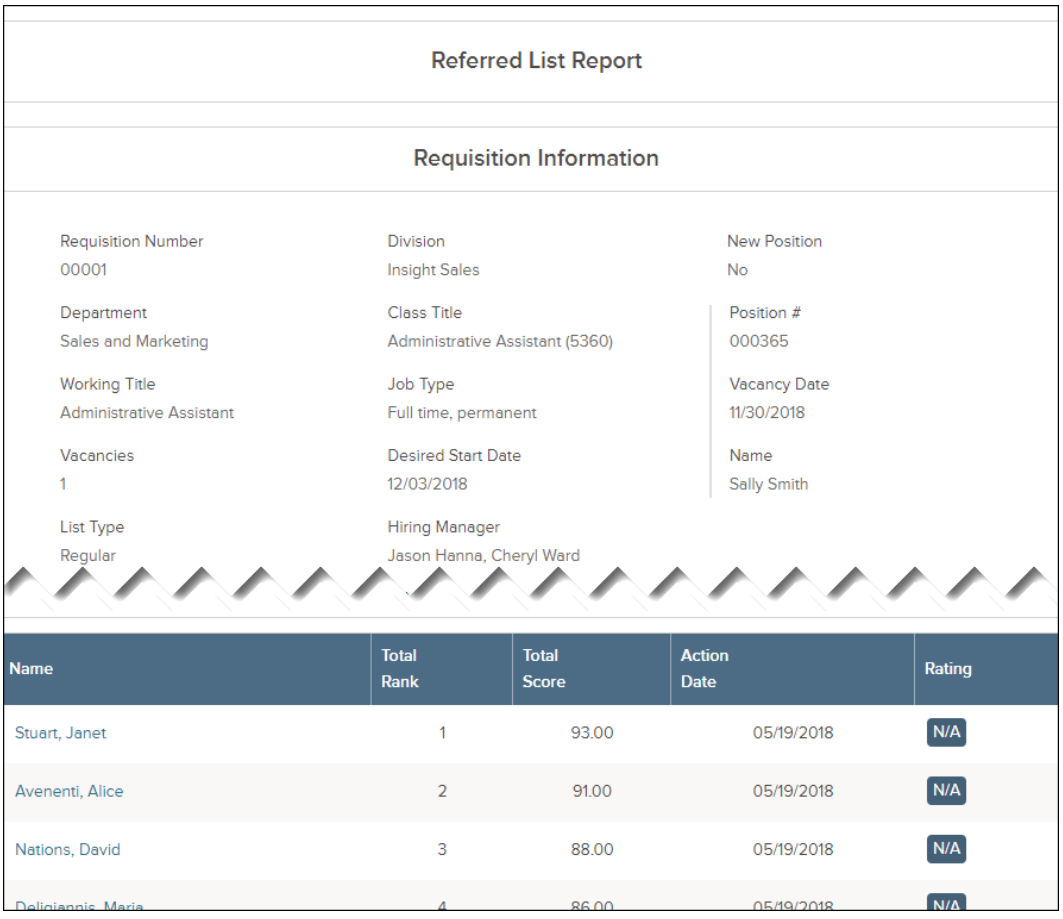




3. Your Insight Administrator has configured the referred list's columns of data. If you prefer to display fewer columns, click [|||] and deselect.

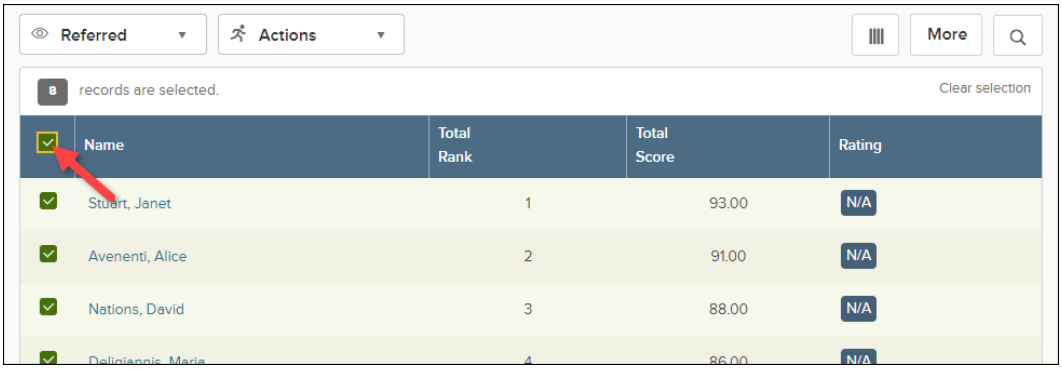


4. Once you're done, you have the option of either printing the exporting the referred list. To print the referred list, simply click Print. This will render a new web browser page to display the Referred List Report. Pres Ctrl+P on your keyboard to print.

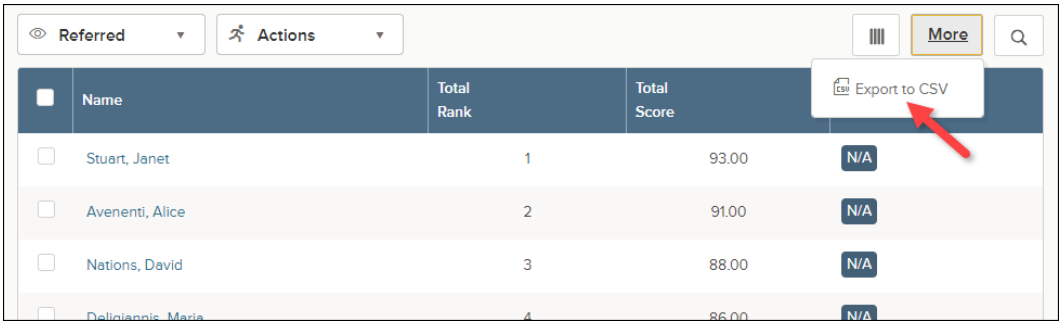


5. Close the report page it to return back to the referred list.

6. Exporting the referred list also takes place from the same page. Select the candidates to be exported.

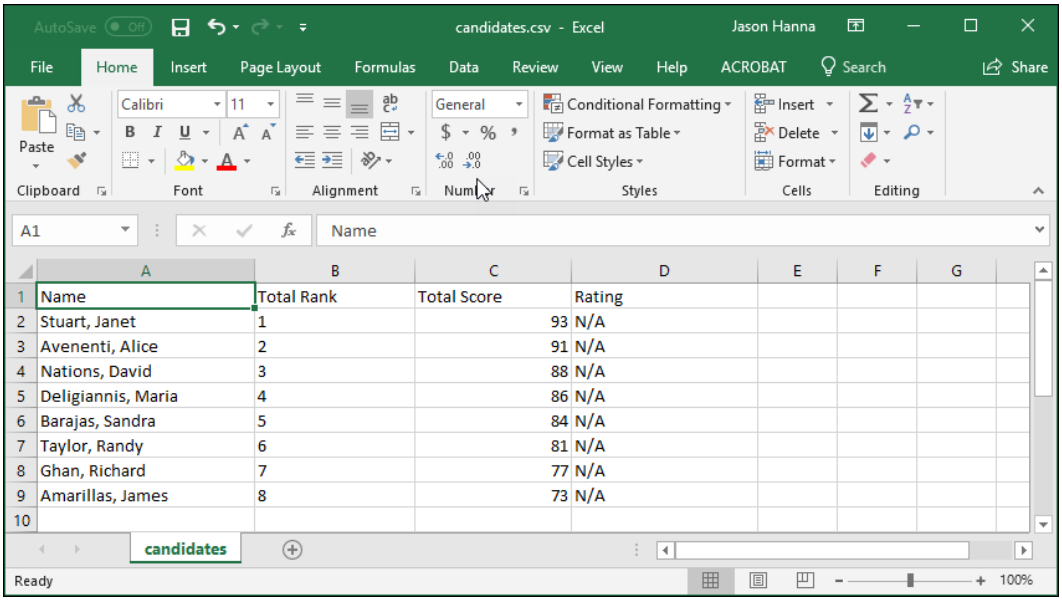


7. On the More menu, click Export to CSV.



8. Save the export file to your preferred file location.

9. Once you're done, open the export file!



Schedule Interviews

It's now time to move your candidates to the interview step! If you're using self-scheduling, all you need to do is move the candidates to the interview step. If you're not using self-scheduling, you'll need to schedule candidates after moving them to the interview step. In either case, you'll want to send them a notice about self-scheduling or their assigned interview appointments. That process detailed in the upcoming, *Send Notices* section.

Required OHC role: With the OHC role of Hiring Manager or HR Liaison you can 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. Select the candidates that will be moved to the interview step.

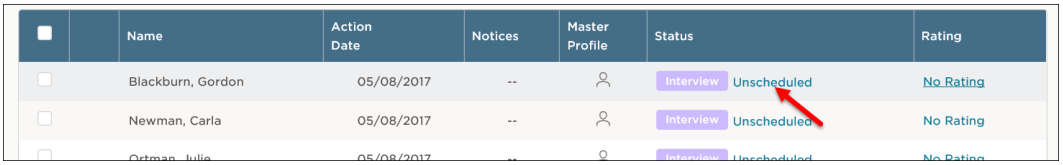
4. On the Actions menu, click Move to Interview.

Note: Your hire workflow may have a customized name for the interview step, e.g., On-Site Interview. If so, click the customize name to move the candidates to that step.

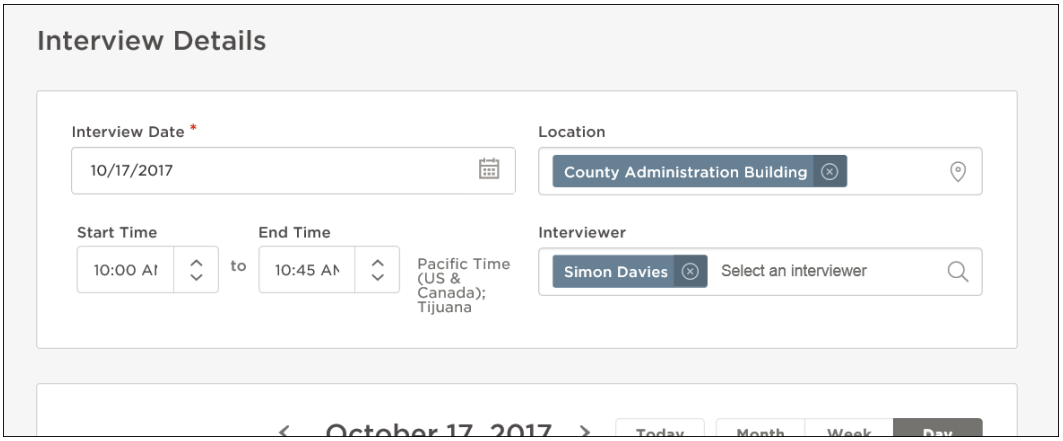
5. Click OK to confirm moving the candidates.

6. The selected candidates have been moved from the referred step to the interview step. To see them again, the view must be switched to the interview step candidates. On the doughnut chart, click Interview, or on the Candidates menu, click Interview.

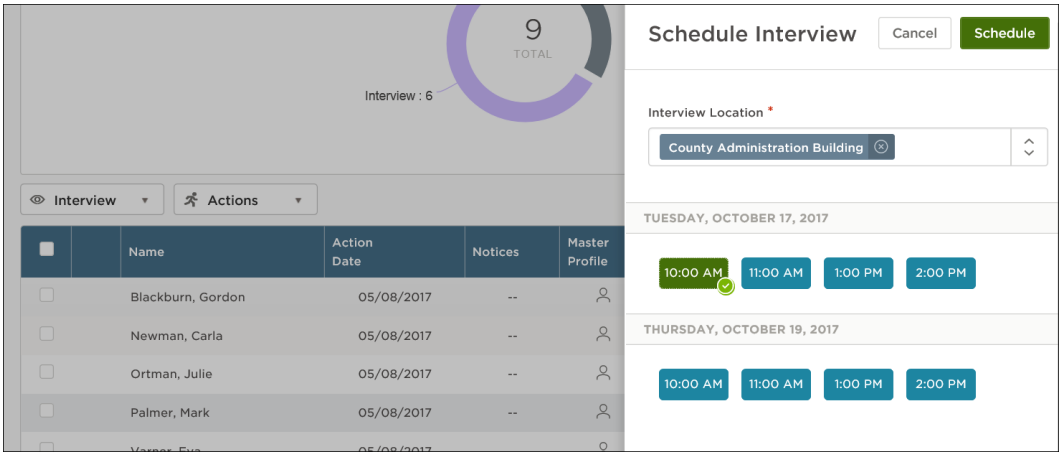
7. From the first candidate to be scheduled for an interview, click Unscheduled.



8. If you do not have pre-configured interviewed slots, a full-detail schedule form will display including date, time, location and interviewer(s). Complete the form and click Save.



9. If you have pre-configured interview slots, you will only need to select the location and date/time. Once you're done, click Schedule.



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

Send Notices

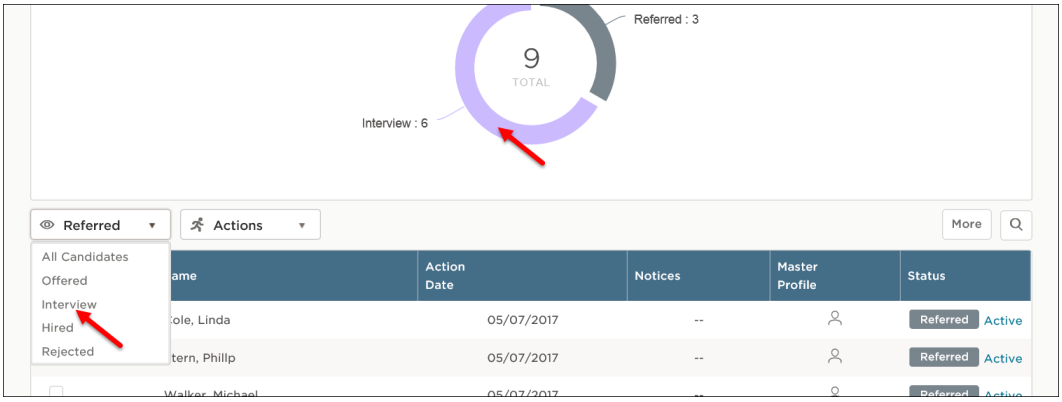
Great news! There' no need to send emails to candidates from your mail client. You can send them directly from the OHC! A few examples of notices may include, self-schedule interview, assigned interview appointment and interview/assessment results.

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

Steps to Send Notices

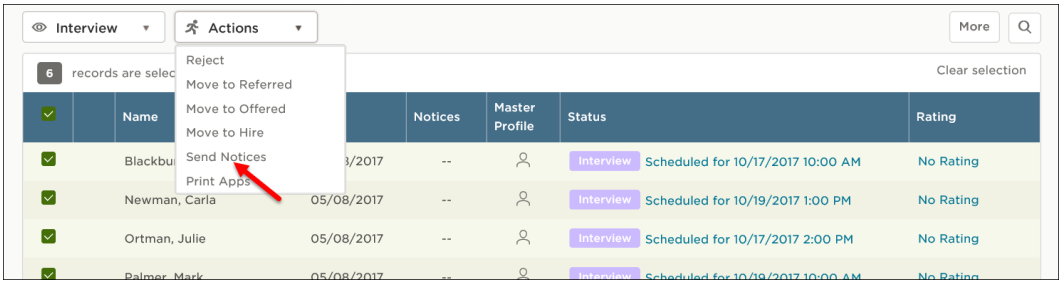
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

2. On the doughnut chart or on the Candidates menu, click the step name where candidates require notification.



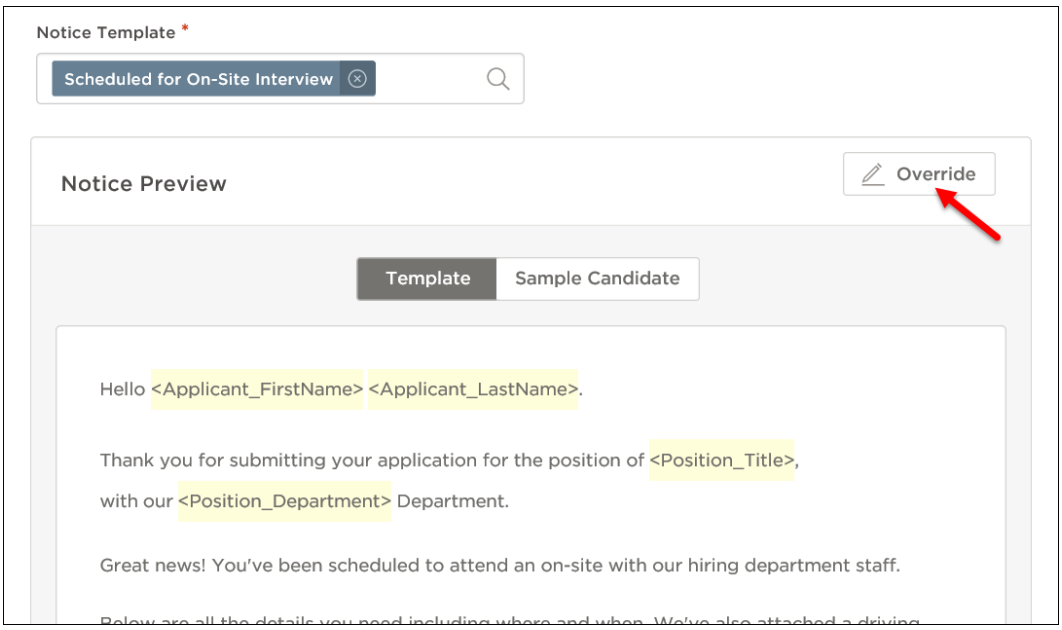
3. Select the candidates to receive notices.

4. On the Actions menu, click Send Notices.

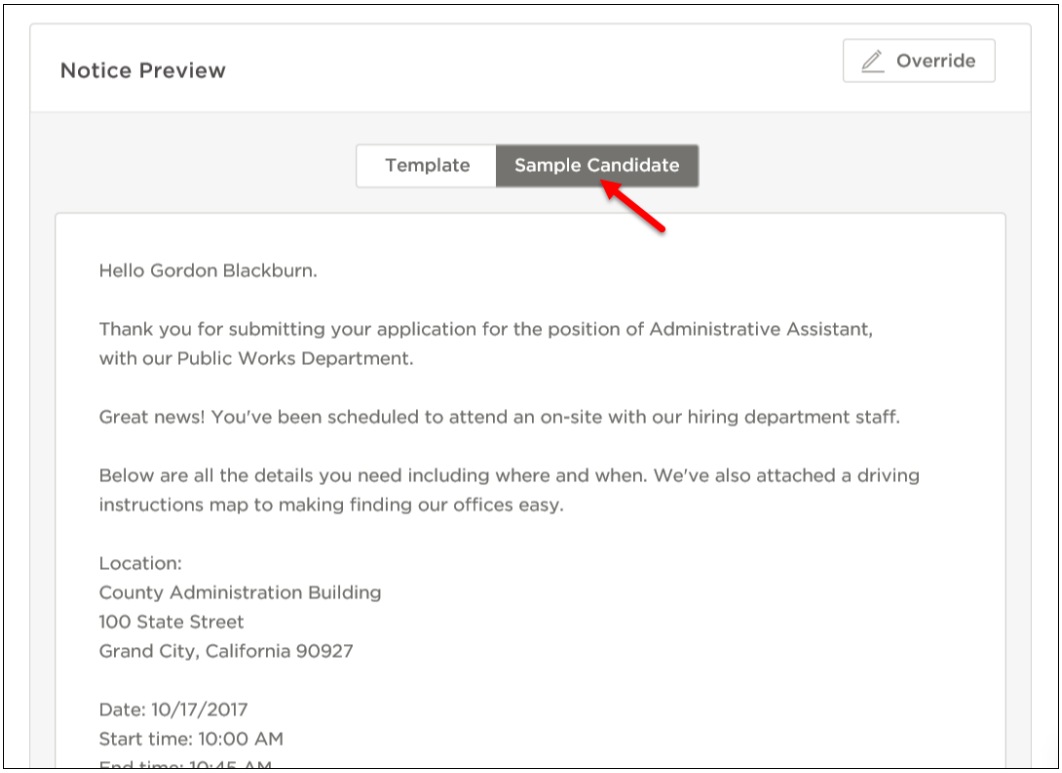


5. Select a notice template.

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.



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



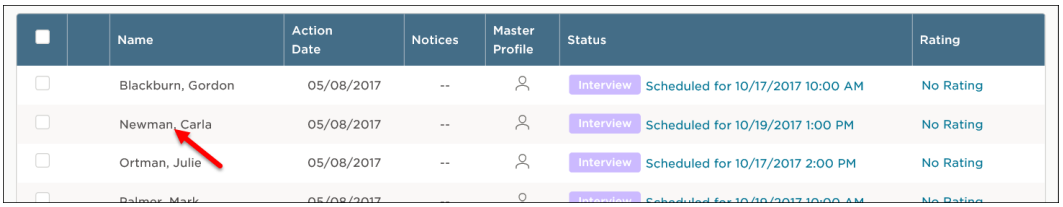
8. Click Send to send the notice to all selected candidates.

Steps to Send an Individual Notice

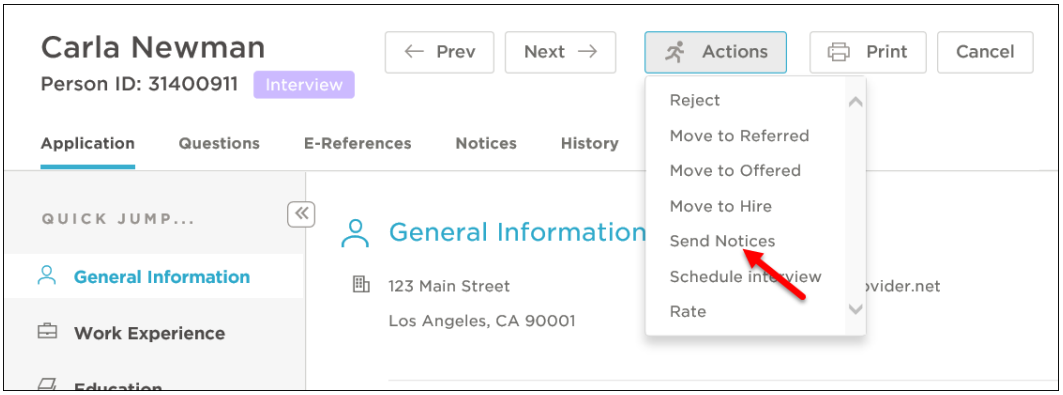
Rather than sending notices in bulk, you can send an individual candidate a notice. This practice may come in handy if each candidate notice must have its own personalized verbiage.

1. Go to your referred list.
2. On the doughnut chart or on the Candidates menu, click the step name a candidate requires a notification.

3. Click the name of the candidate to receive the notice.

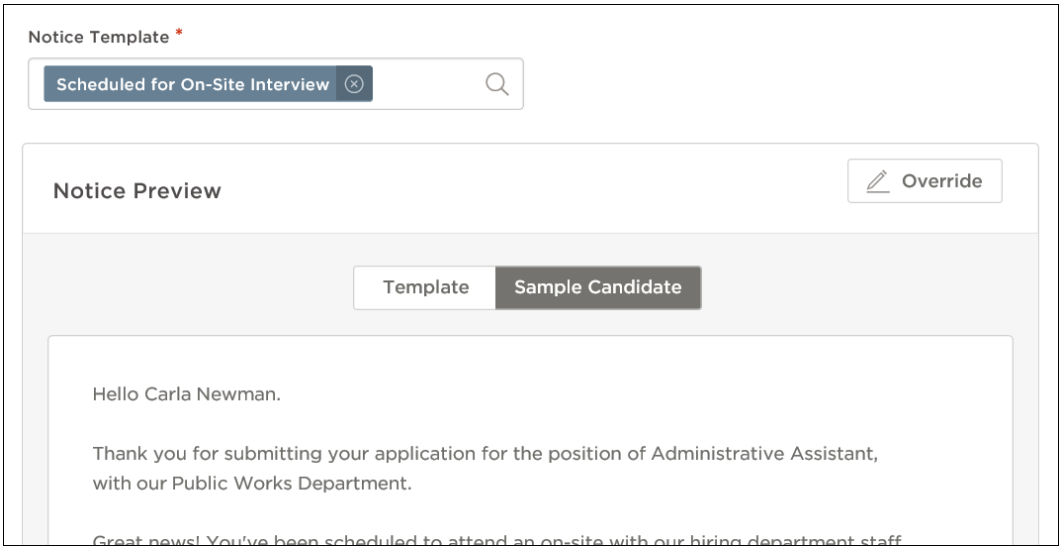


4. On the Actions menu, click Send Notices.



5. Select a notice template.
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.

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



8. Click Send to send the notice to the candidate.

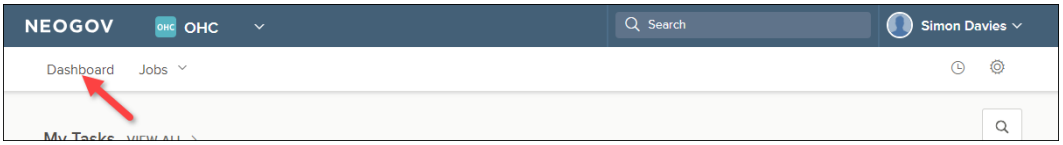
Complete a Rating

If you've been tasked with completing a rating for one or more candidates, you will receive an email notification and the task will appear in the My Tasks section of your dashboard. Depending on the scoring method setup, you will rate based on a star rating, pass/fail, or a numeric score value.

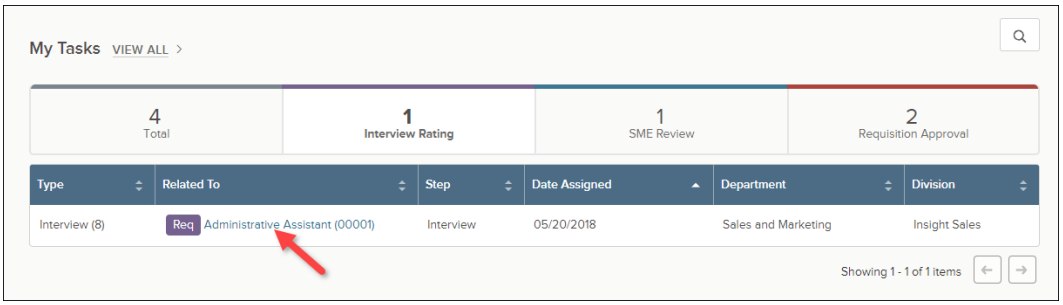
Required OHC role: With the OHC role of Rater, you can complete a rating.

Steps to Complete a Rating

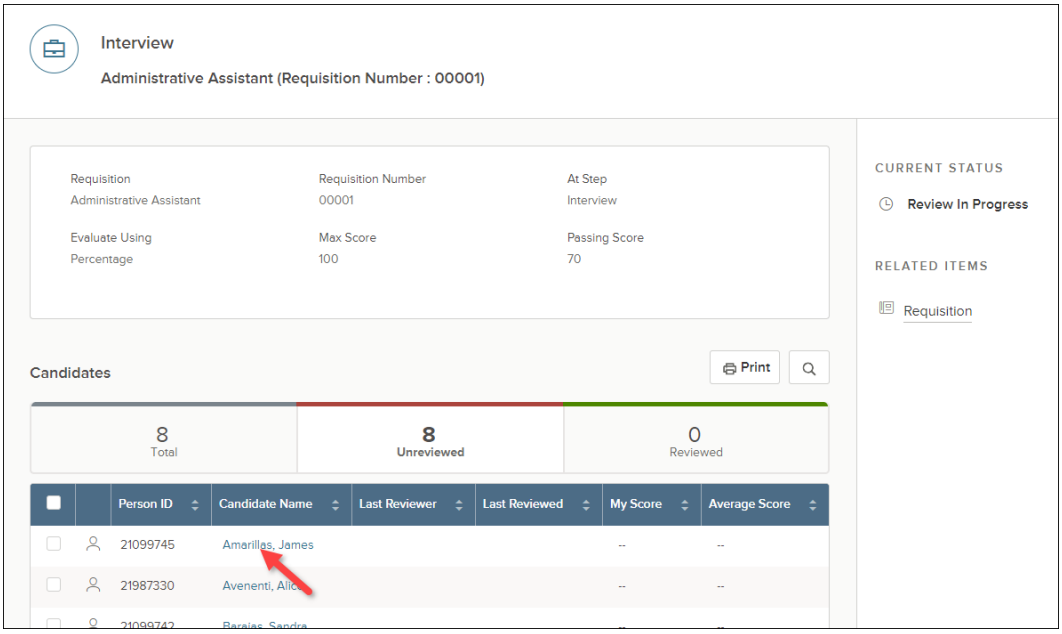
1. If you're not already viewing your dashboard page, click Dashboard from the upper left.



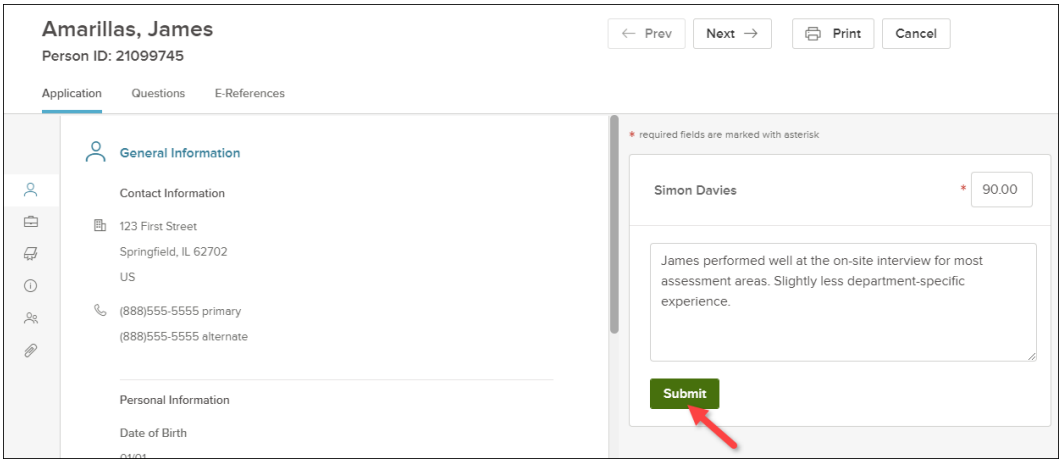
2. From the My Tasks section, click the rating pending your review.



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

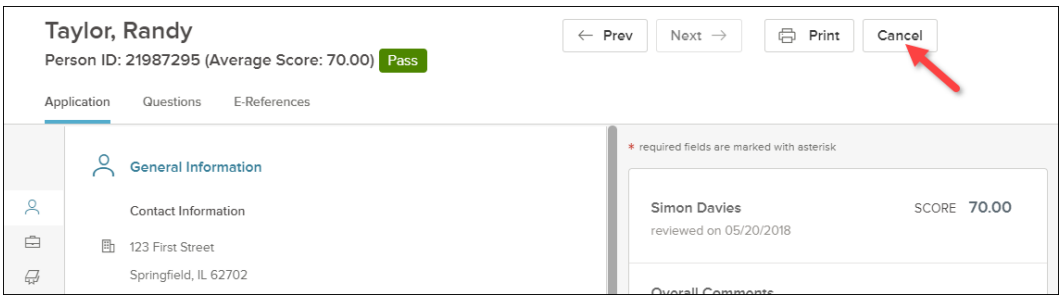


4. Depending on how the step is configured, this can be a pass or fail, a star rating, or a numeric value. Also, enter any comments and click Submit. The next candidate pending your review will display.

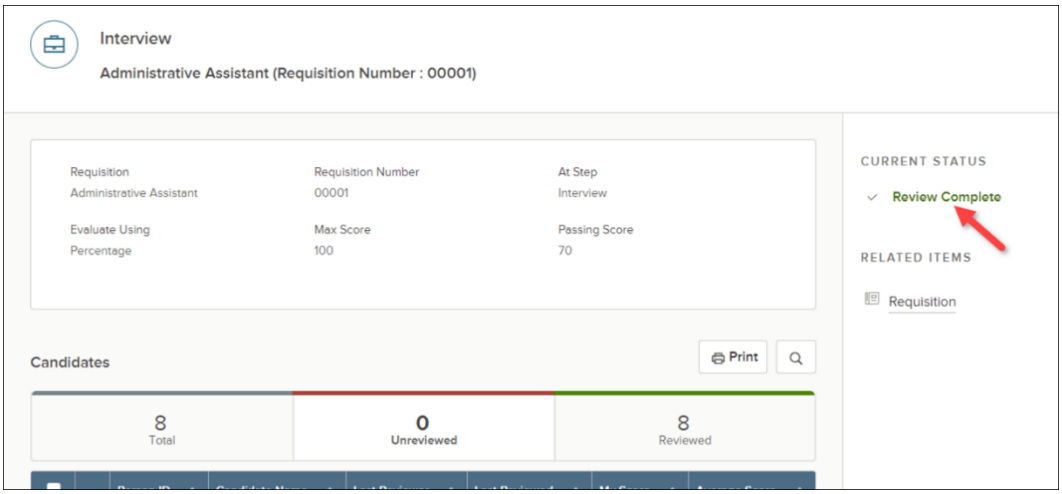


Note: Once a rater submits a rating it is locked and cannot be changed. If a rating must be changed, an OHC user with the role of Hiring Manager or HR Liaison can complete the changes on behalf of the rater or send the rating back to the rater. The process of sending back unlocks the rating, allowing for the rater to complete changes.

5. Repeat these rating steps for all remaining candidates. Click Cancel or click anywhere to the left of the last candidate's application review page.



6. Notice you have no unreviewed candidates and your review status is complete.



7. After the rating is complete, you can view the results from the workflow step.

Create Candidate Notes

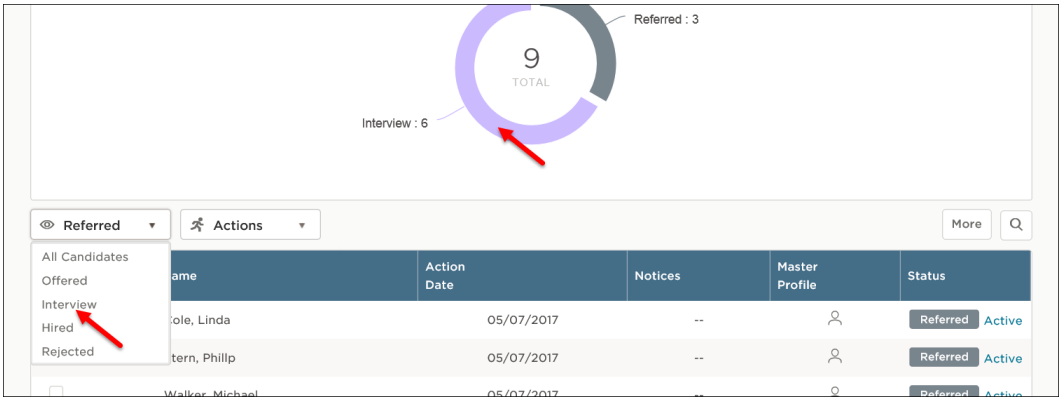
While evaluating candidates, taking notes along the way is crucial. From a general application review to an on-site interview; each candidate's application record has a notes section for you to accurately document the moment.

Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can create notes about the candidates you evaluate.

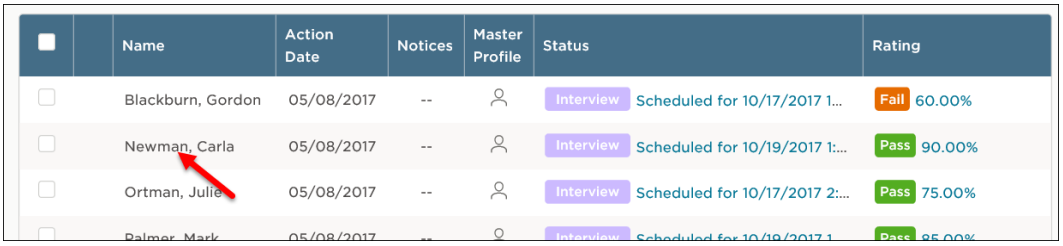
Steps to Create Candidate Notes

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 candidates.

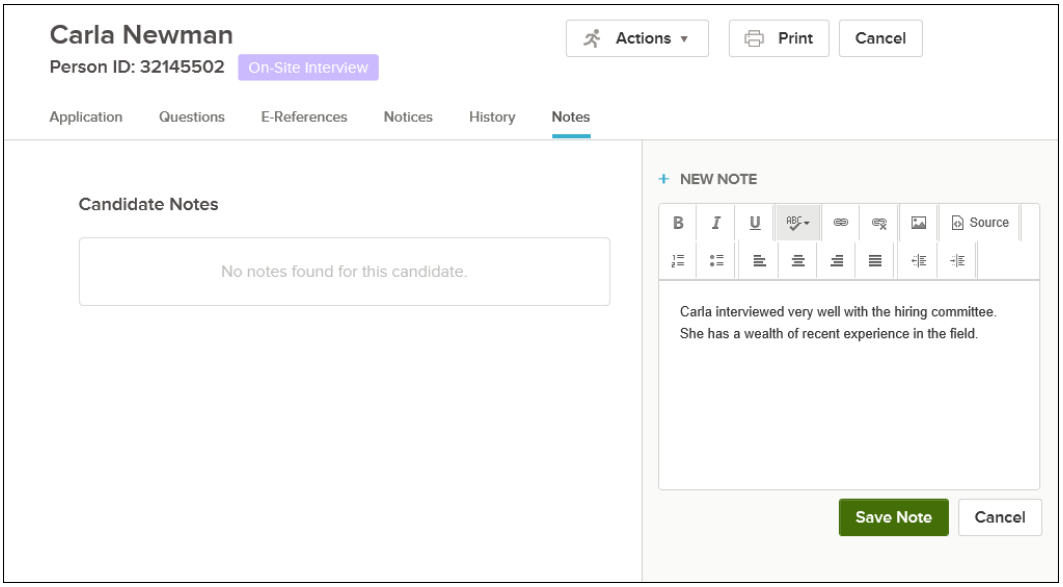


3. Click the name the candidate to view their application record.

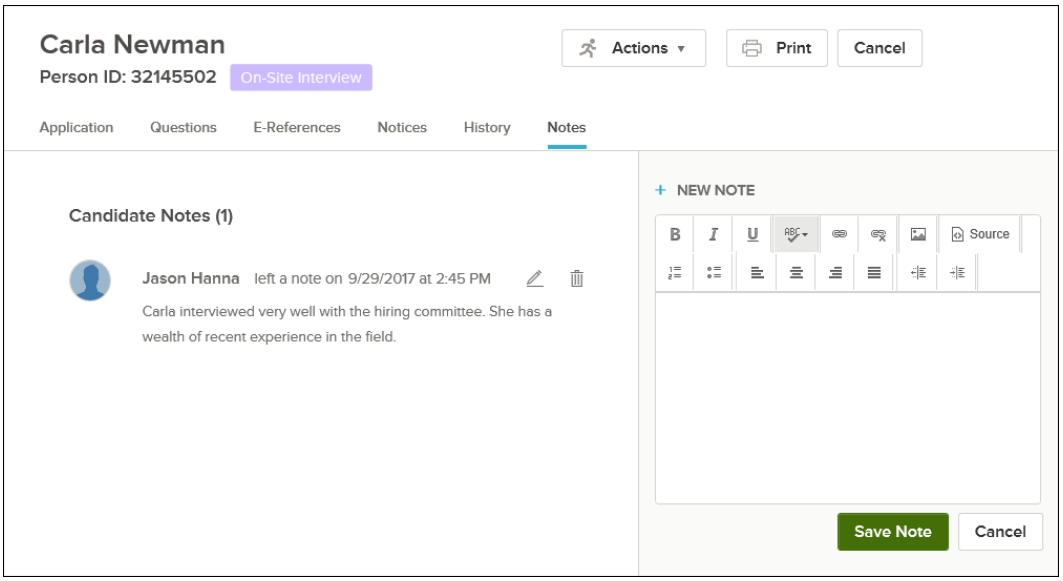


4. Click the Notes tab.

5. From the New Note section, enter your note and then click Save Note.



The note will be logged with a date/time stamp. You can return back at any time to view, edit or delete the note.



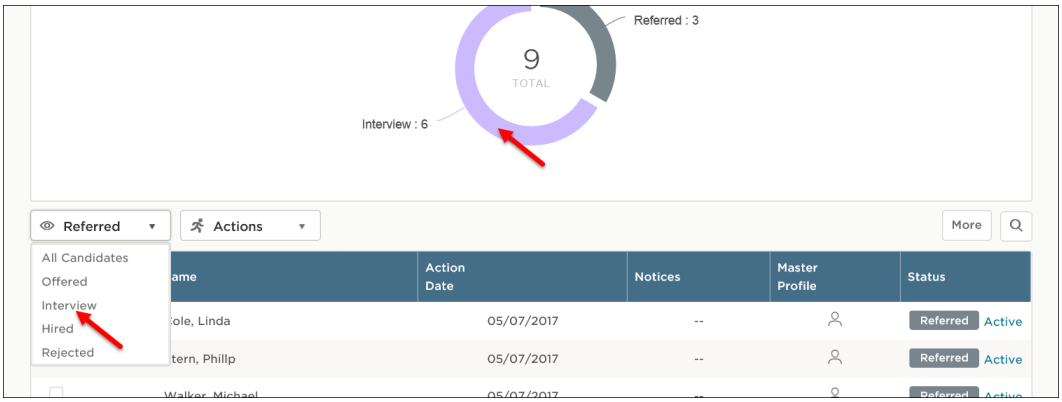
Reject a Candidate

Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can reject a candidate.

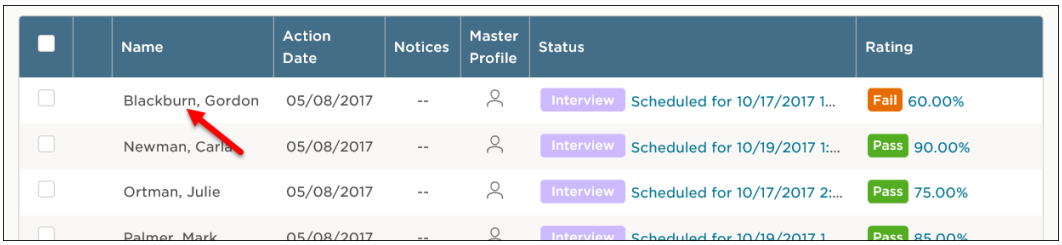
Steps to Reject a Candidate

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

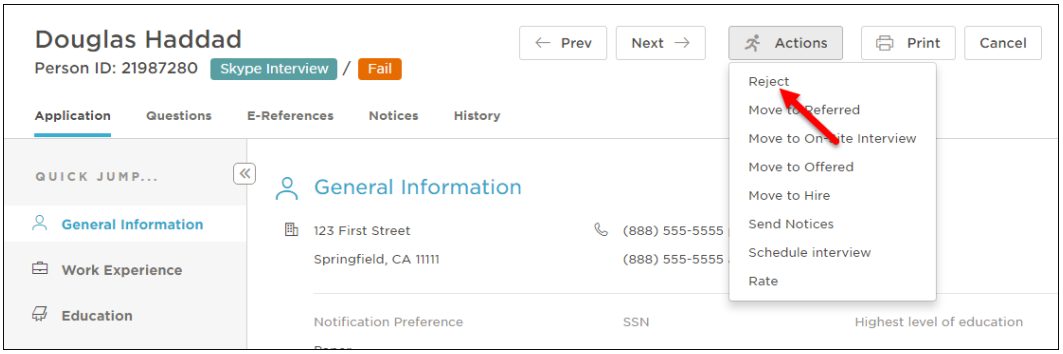
2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and determined one or more will be rejected.



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



4. On the Actions menu, click Reject.



5. Click and select a reject reason.

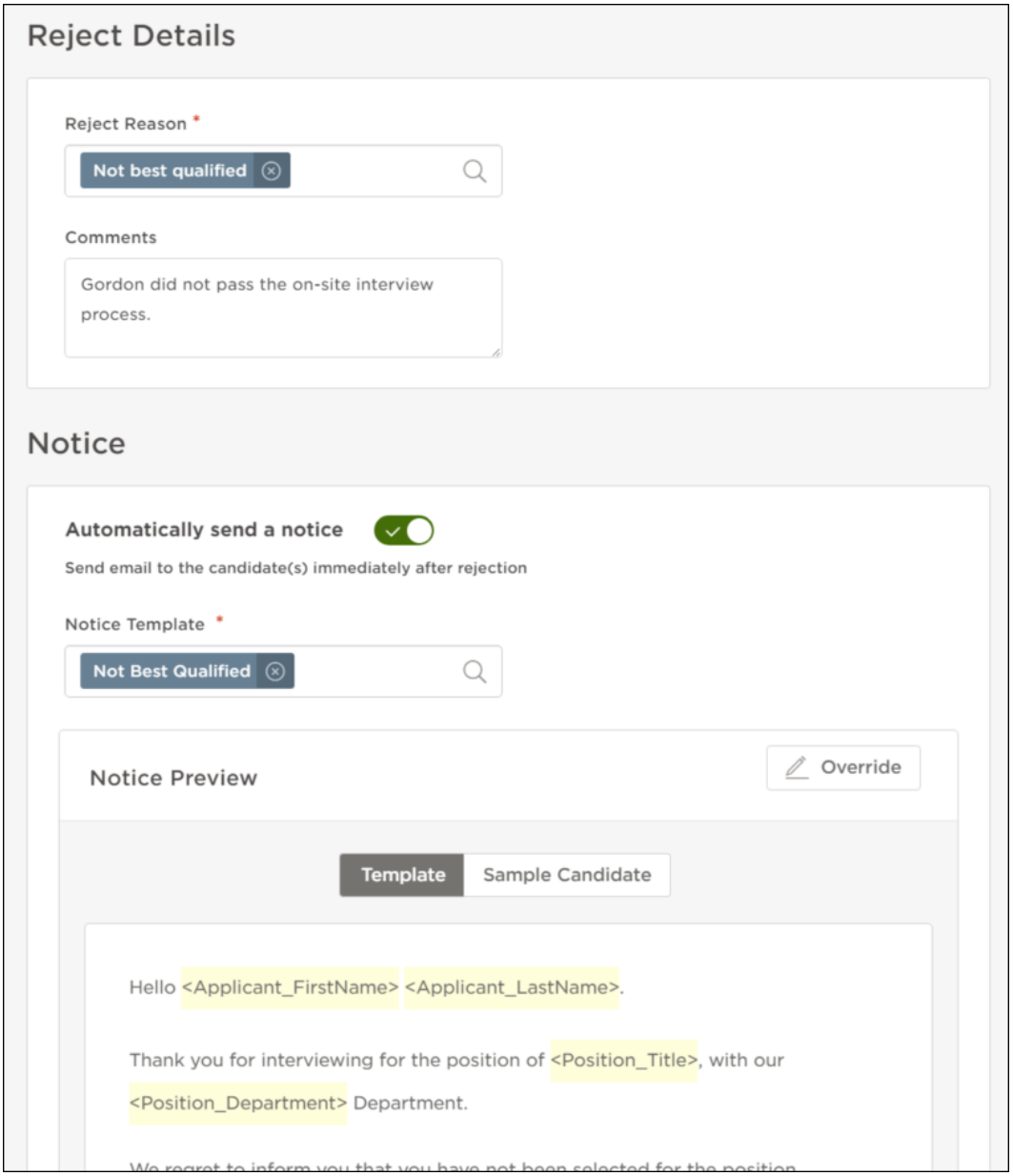
6. If preferred, enter comments providing more details.

7. Additionally, you can choose to automatically send a notice to the candidate. From the "Automatically send a notice" switch, click to the on setting.

Note: If you'd prefer to leave this switched off and send all rejected candidates notices at the same time, check out the upcoming, *Send Rejection Notices in Bulk* section.

8. If a notice template is not linked to your reject reason, select the proper notice template

9. If necessary, click Override to make a one-time update to the notice prior to sending.



10. Once you're done, click Save.

11. Repeat these steps for any remaining rejected candidates.

Steps to Reject Candidates in Bulk

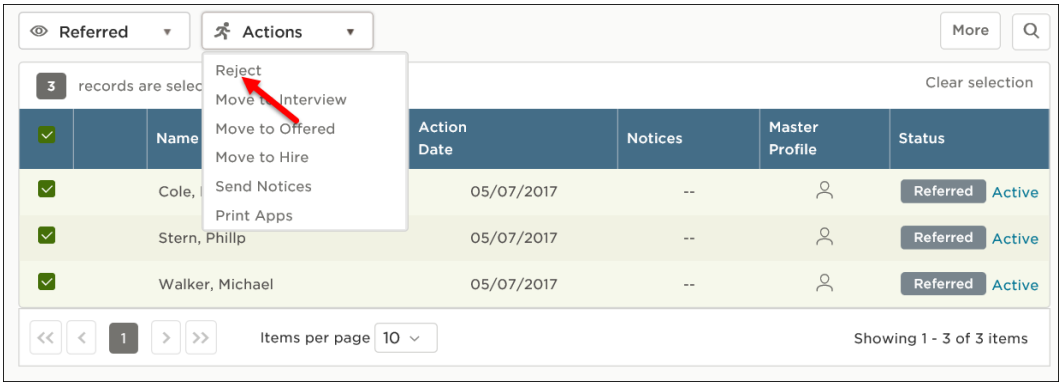
Alternatively, you can reject multiple candidates at the same time. This process will designate the same reject reason and comments for all selected candidates. As a result, you may have a few of rounds of bulk rejecting if candidates have different reject reasons and/or comments.

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 and comments.

4. On the Actions menu, click Reject.



5. Click and select a reject reason.

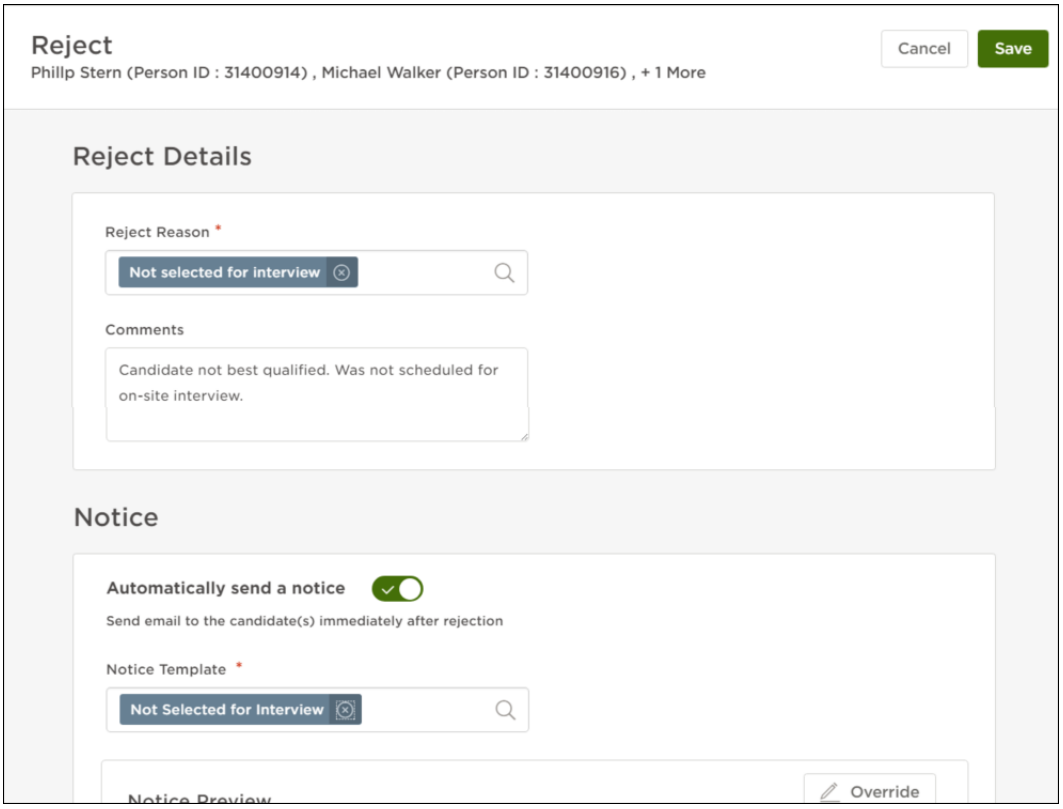
6. If preferred, enter comments providing more details.

7. Additionally, you can choose to automatically send a notice to the candidate. From the "Automatically send a notice" switch, click to the on setting.

Note: If you'd prefer to leave this switched off and send all rejected candidates notices at the same time, check out the upcoming, *Send Rejection Notices in Bulk* section.

8. If a notice template is not linked to your reject reason, select the proper notice template

9. If necessary, click Override to make a one-time update to the notice prior to sending.



10. Once you're done, click Save.

11. Repeat these steps for any remaining rounds of rejected candidates.

Send Rejection Notices in Bulk

If you've rejected all applicable candidates for various reasons, but haven't yet sent them notices, you can do so in bulk.

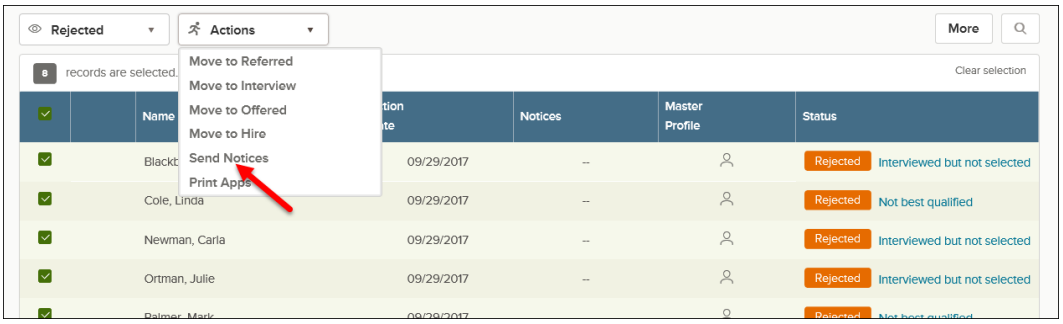
Steps to Send Rejection Notices in Bulk

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

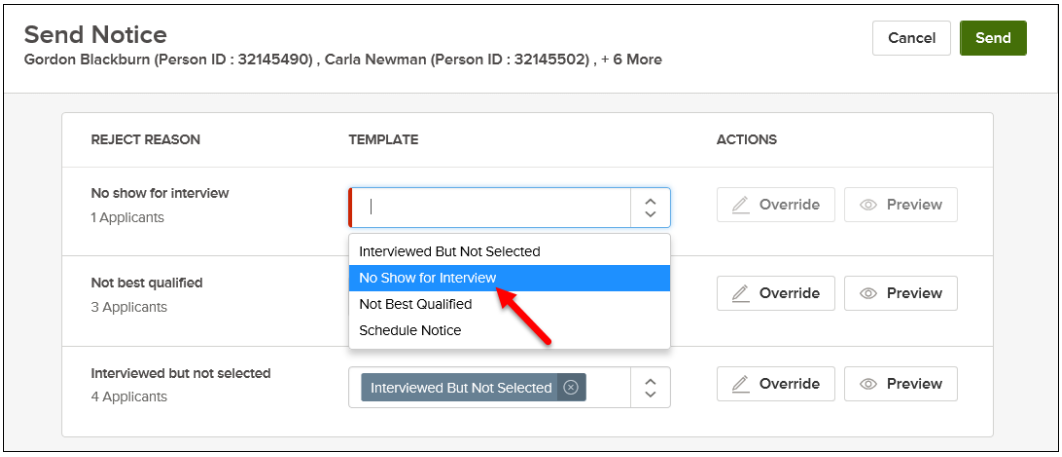
2. On the doughnut chart, click Rejected, or on the Candidates menu, click Rejected.

3. Select the all candidates that will receive rejection notices.

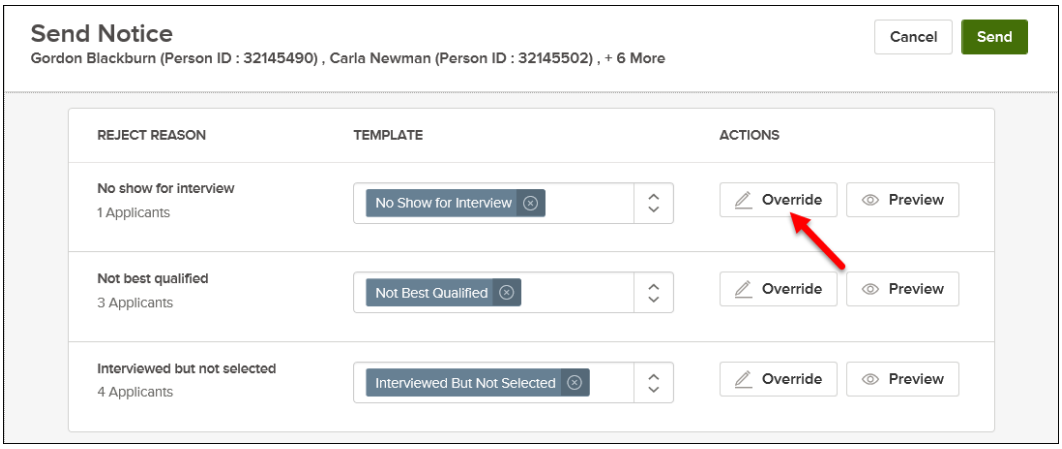
4. On the Actions menu, click Reject.



5. Pre-selected notice templates will display based on the reject reason. If one or more reject reasons do not have associated notice templates, select them at this time.



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.



7. Once you're done, click Send.

Make an Offer

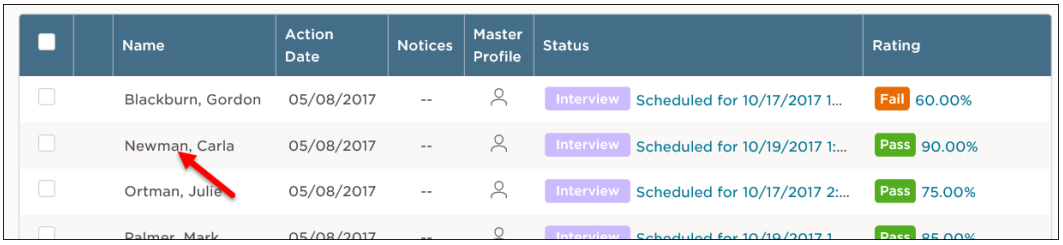
Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can make an offer of employment for the preferred candidate.

Steps to Make an Offer

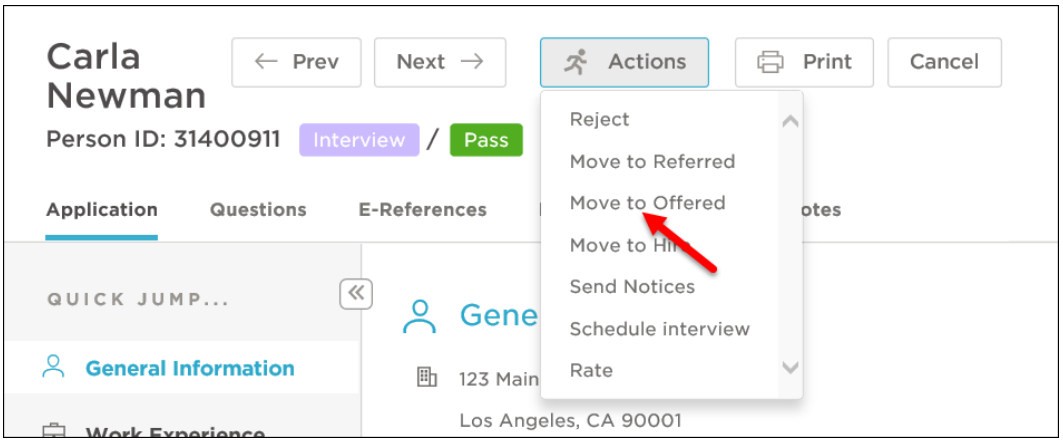
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.

2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and will make an offer for one of them.

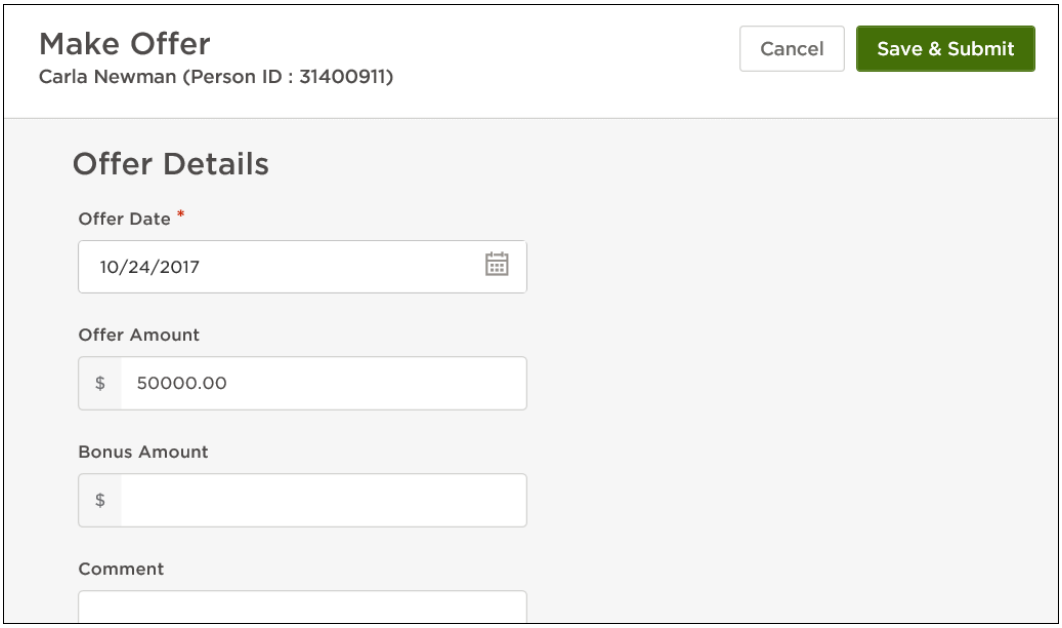
3. Click the name the candidate to receive the offer.



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



5. Enter the offer date and any additional details including dollar values and comments.



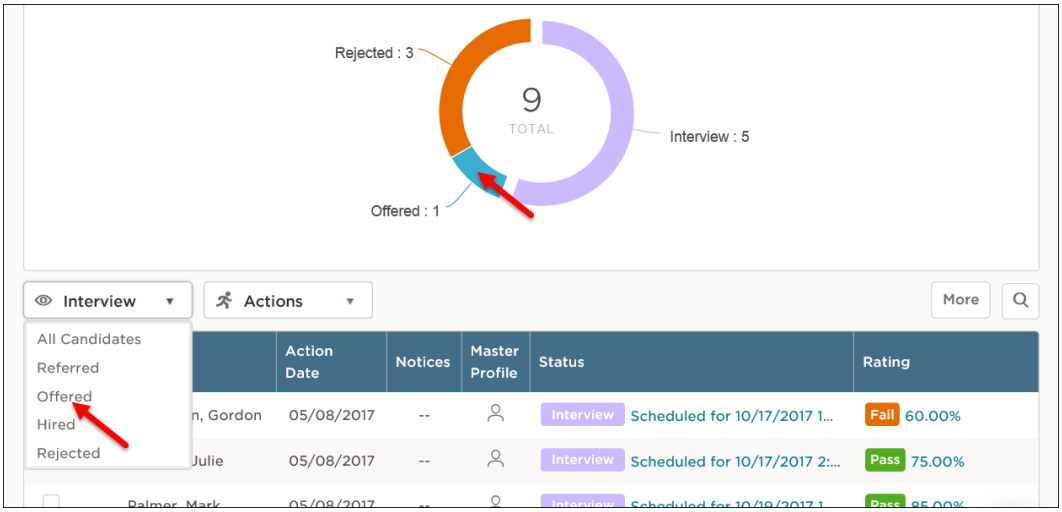
6. Once you're done, click Save & Submit.

Steps to Update Offer Status

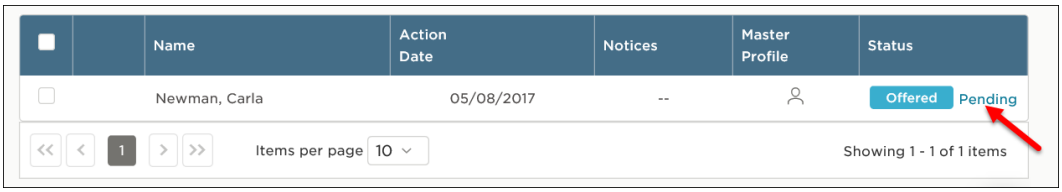
If the candidate has accepted or rejected your offer of employment, the status can be updated to track the event.

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 offered step.

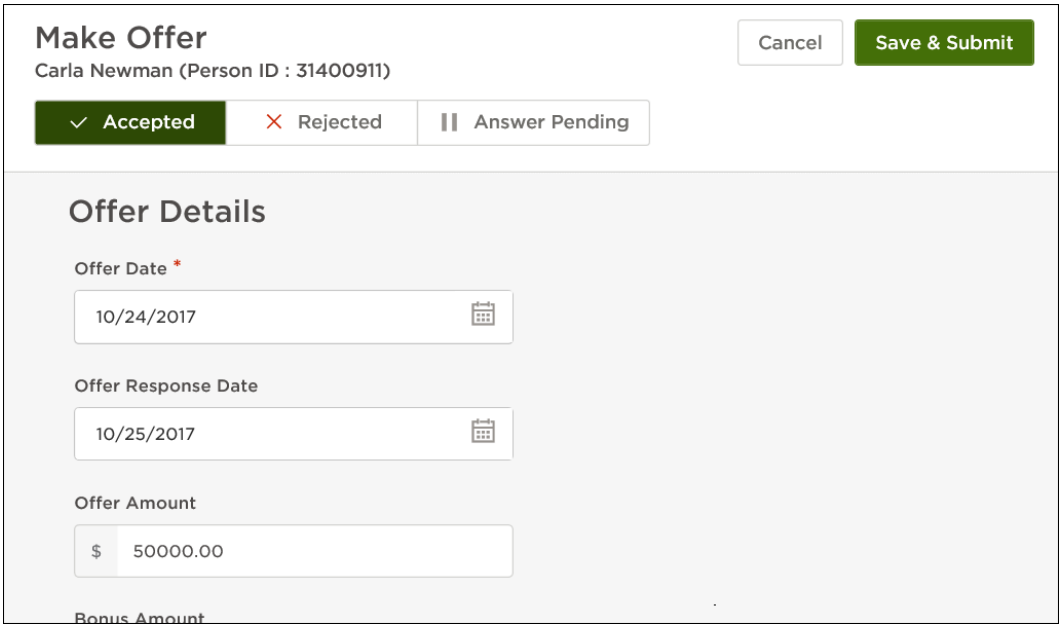


3. From the Status column, click Pending.



4. Click Edit and either Accepted or Rejected.

5. Enter the response date and any additional details.



6. Once you're done, click Save & Submit.

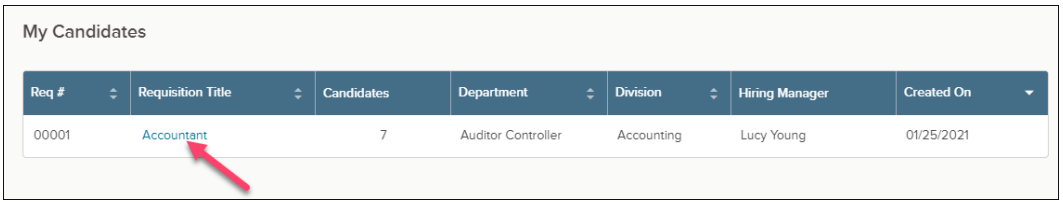
Make an Offer With Approvals

Your organization may require an offer of employment to go through an approval workflow prior to being sent to the preferred candidate.

Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can make an offer with approvals.

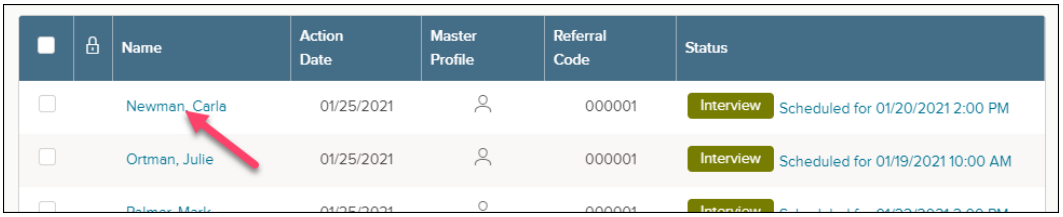
Steps to Make an Offer With Approvals

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

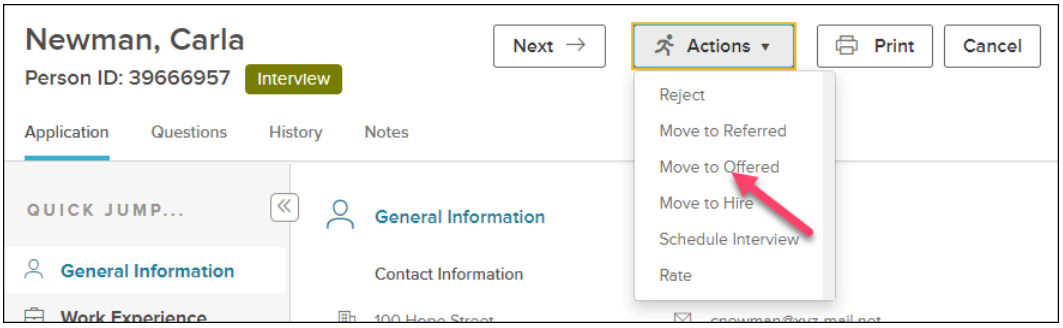


2. On the doughnut chart or on the Candidates menu, click the step name where you have reviewed candidates and will make an offer for one of them.

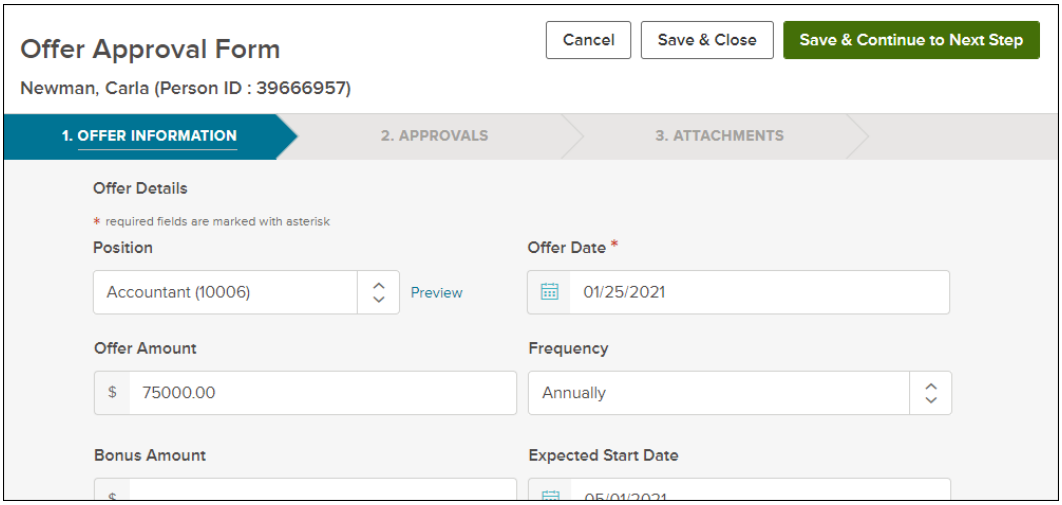
3. Click the name the candidate to receive the offer.



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

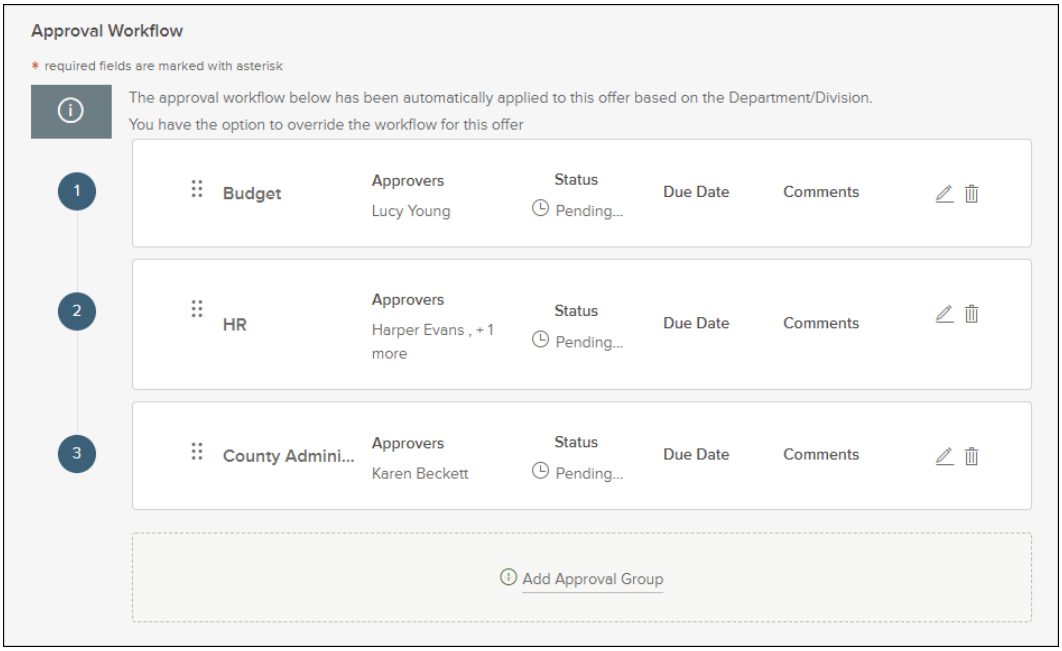


5. Enter the offer date and any additional details including dollar values and comments.

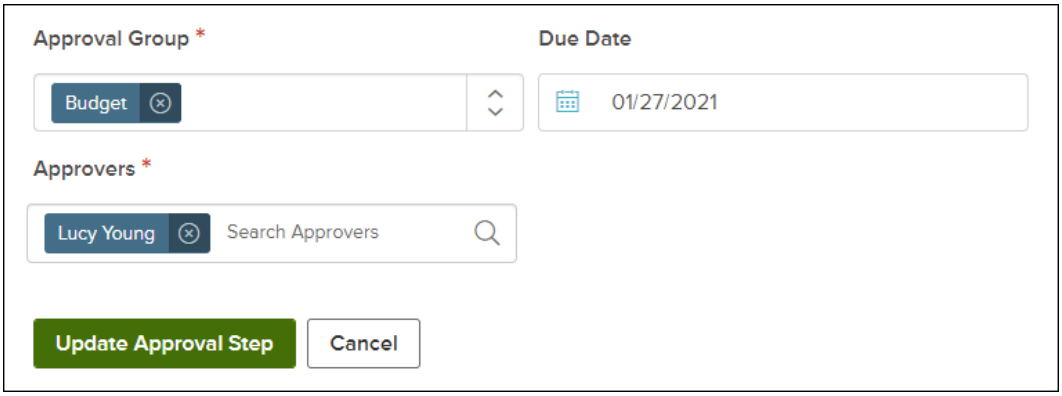


6. Once you're done, click Save & Continue to Next Step.

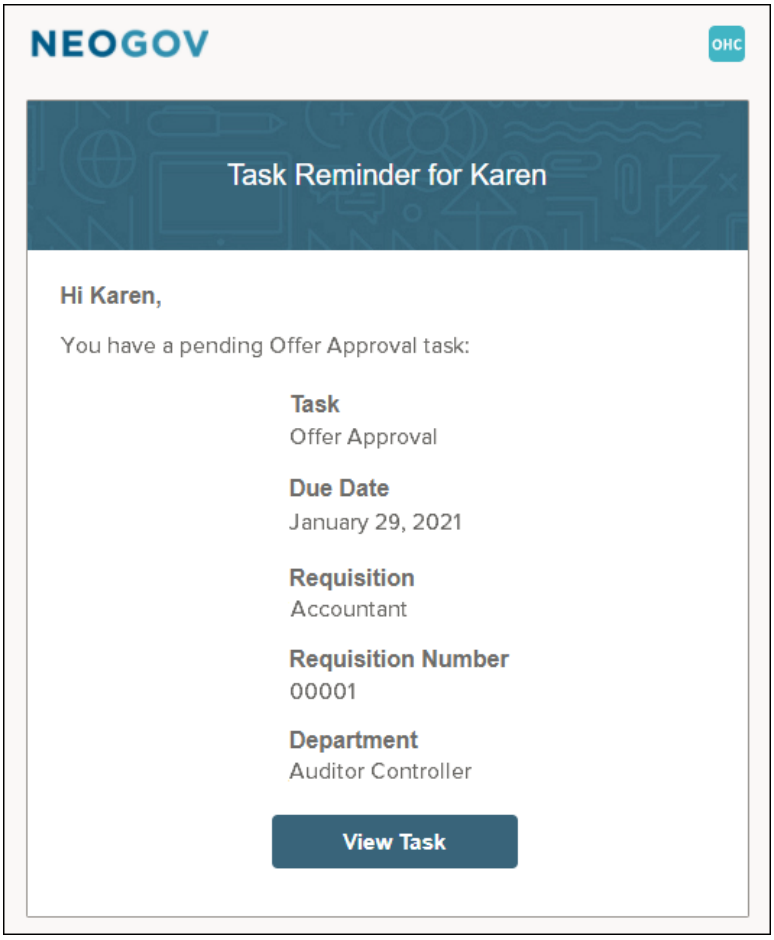
7. If you have an approval workflow template, it will display on the second offer form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes will only be applied to this offer, not the saved approval workflow template.



8. Keep the assigned approver(s) reminded about their approval task with a due date. Click , enter a due date, and then click Update Approval Step.



9. Repeat these steps for all remaining approval steps that require due dates. The assigned approver(s) will receive a reminder email from info@neogov.com, with the subject line, NEOGOV OHC Task Reminder, on the due day and each day the approval task is past due; until the task is completed. In the contents of the reminder email will be a View Task button, guiding the approver(s) to the task requiring their attention.



Note: Task reminder emails, such as the offer approval reminder, must be enabled by an Insight Administrator (Insight navigation: Admin > Agency Preferences > OHC section).

10. If a template for your department/division does not exist, you will be prompted to create an approval workflow. You have two options: (1) Create an approval workflow. (2) Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.

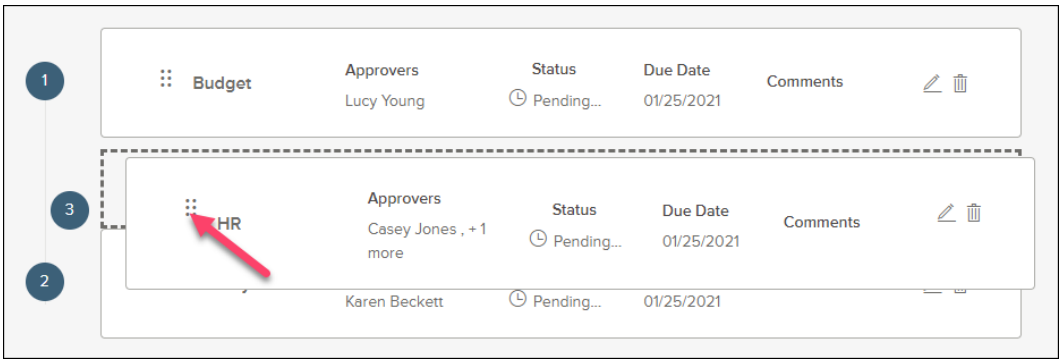
11. On the Approval Group pulldown, click the applicable approval group.

12. From the Approvers field, click , select the applicable approvers, and then click Done.

13. Click Add Approval Step.

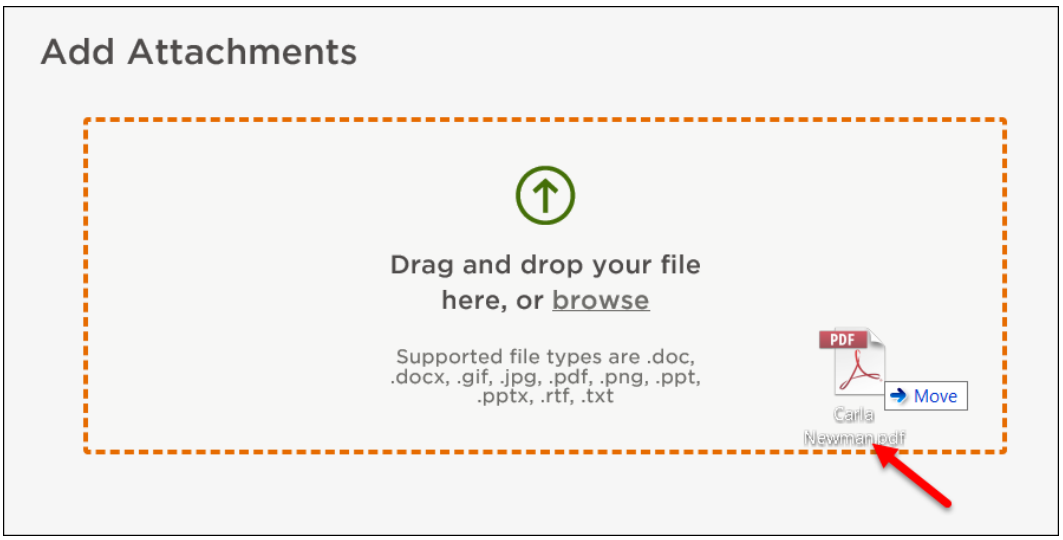
14. Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.

15. Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop.



16. Once you're done, click Save & Continue to Next Step.

17. Drag any file attachments (e.g., draft offer letter and/or offer details) to the third offer form page and click Save & Submit.



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

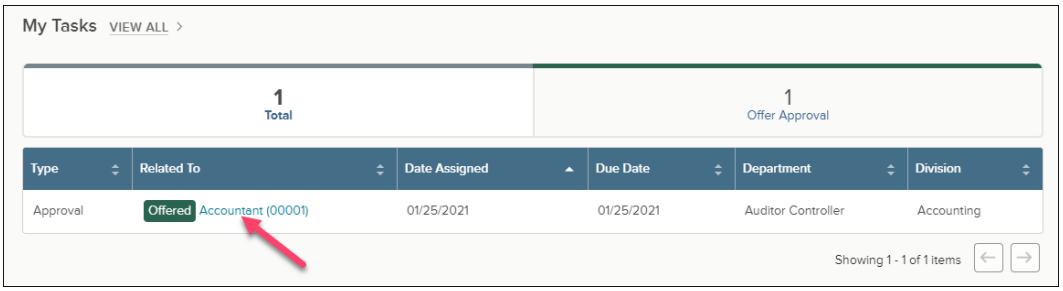
Approve an Offer

Required OHC role: With the OHC role of Approver, you can review an offer sent to you for approval.

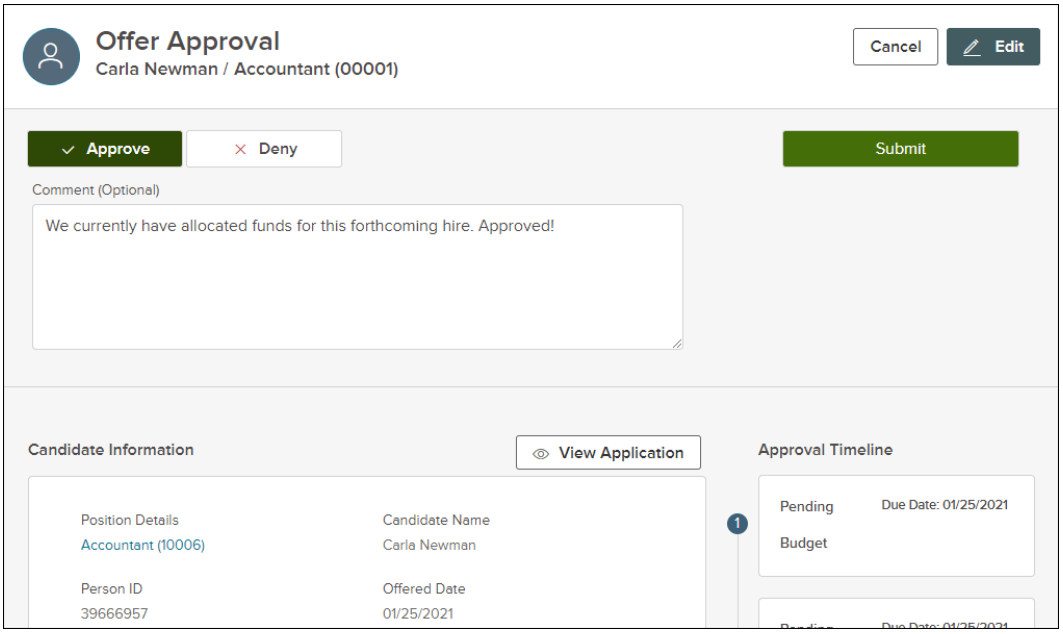
Steps to Approve an Offer

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

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

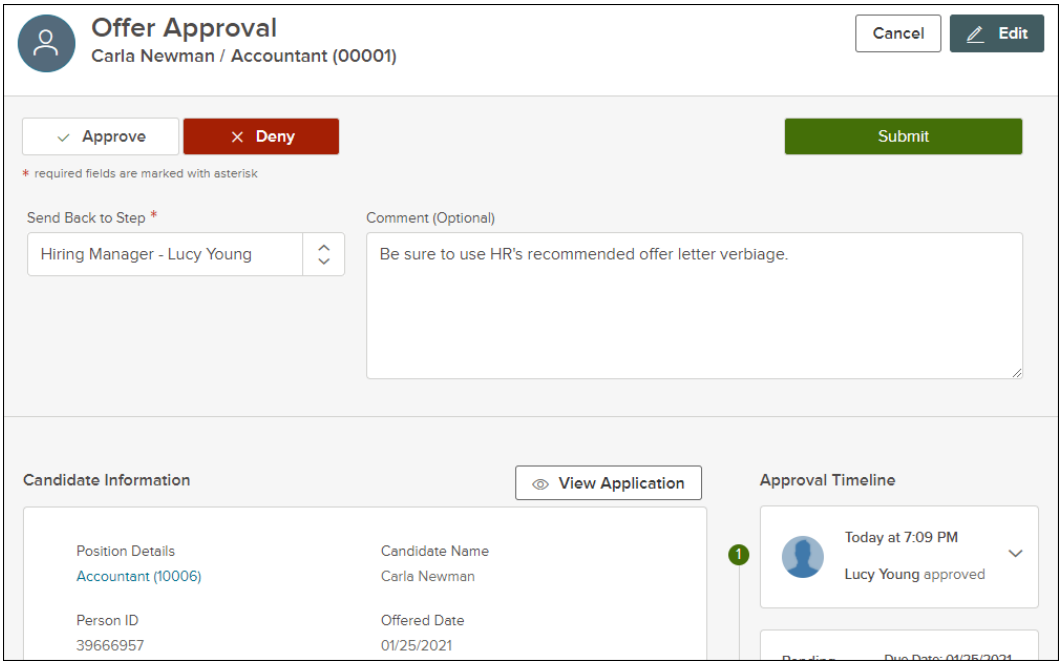


3. Click Approve, type any comments and click Submit.



4. If you're testing the approval workflow process, you may be an approver for multiple approval groups. In this case, repeat these steps until the offer has been approved by all groups.

Note: Approvers have the option of denying an offer. If this is done, the offer record can be sent back to any one of the previous approval groups, or all the way back to the hiring manager. Depending on the circumstances of the denial (e.g., additional justification), the offer approval process can be restarted.



Make an e-Offer

The e-Offer feature automates allows you to send an offer letter directly to the preferred candidate through the system. The candidate is then able to login to their Governmentjobs.com profile to view the offer details and sign and accept or reject the offer. This feature must be enabled by your Insight Administrator.

Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can make an e-Offer of employment for the preferred candidate.

Steps to Create e-Offer Letter Templates

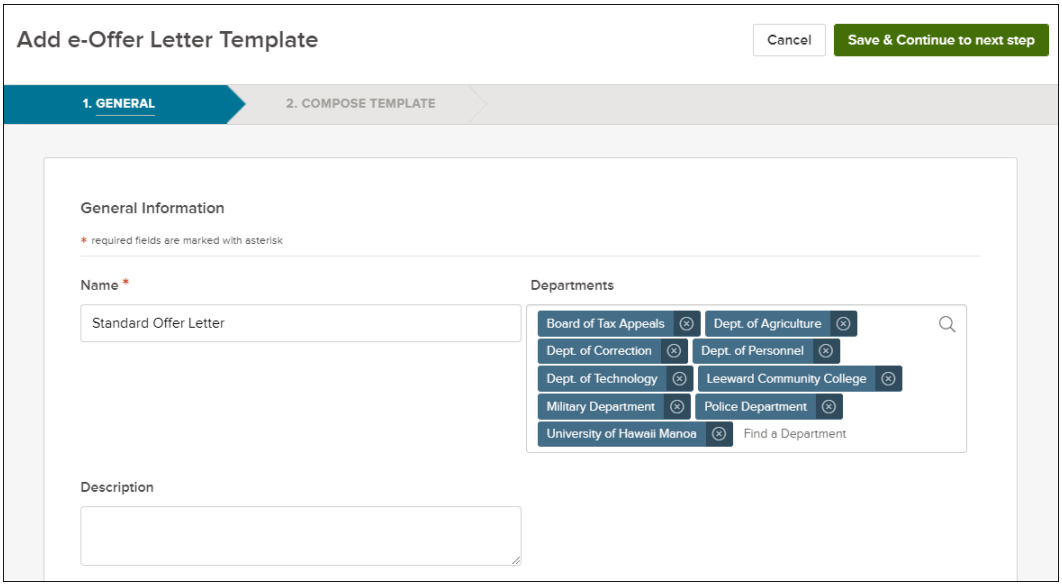
When the e-Offer feature is enabled, HR Liaisons can create and edit offer letter templates. By default, Hiring Managers do not have access to create and edit offer letter templates. However, Insight Administrators can grant them access by adjusting your OHC Security Roles settings.

To create an e-Offer Letter Template:

1. From the upper right, click the Settings button. It looks like a gear.

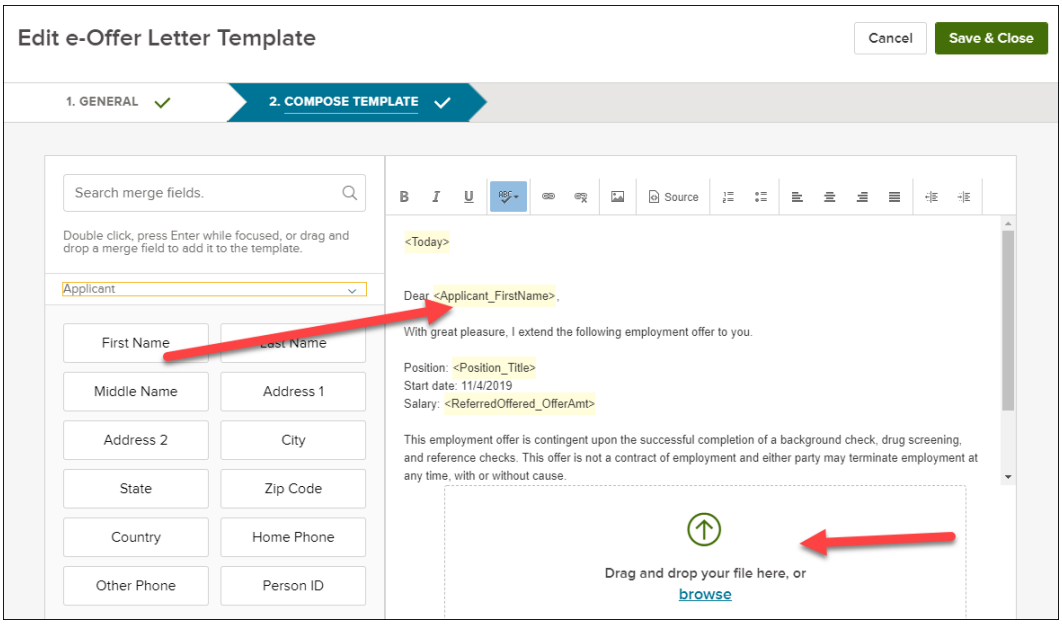
2. Click e-Offer and then click Add

3. The first of two e-Offer letter template pages will display.



4. Complete the e-Offer letter template form and click Save & Continue to Next Step.

5. Type the contents of your e-Offer letter template. When a merge field is required, locate it using left-side search and then drag to the proper area of the notice. Also, drag any applicable files to the attachments section.



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

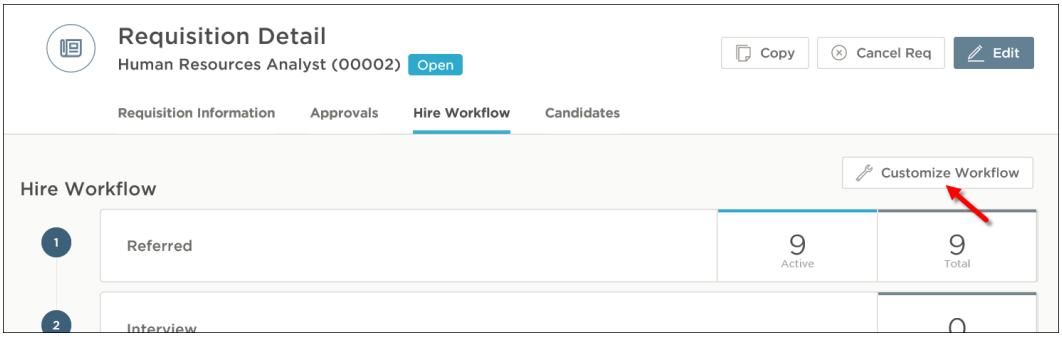
Steps to Enable e-Offers in the Hire Workflow

In order to send candidates an e-Offer, the HR Liaison or Hiring Manager will need to customize the OHC hire workflow to enable the feature on the individual referred list.

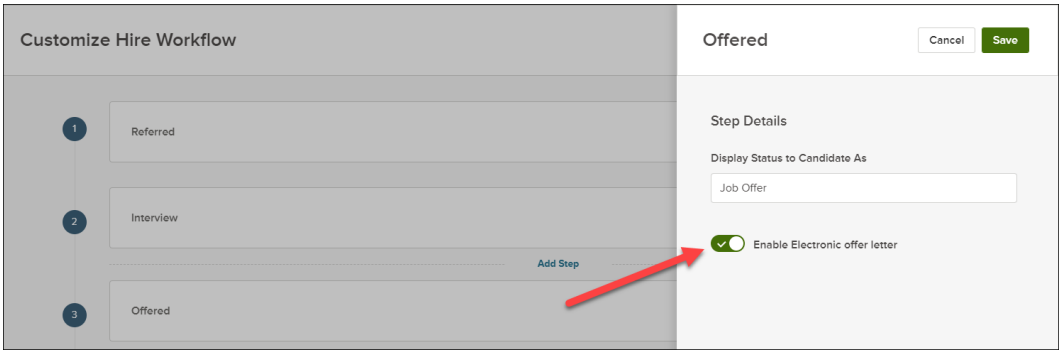
1. If you're not already viewing your OHC dashboard page, click Dashboard from the upper left.

2. From the My Candidates section, click the referred list for which you want to enable e-Offers.

3. Click the Hire Workflow tab and then click Customize Workflow.



4. From the Offered step, click . Update the candidate status and toggle the Enable Electronic Offer Letter switch to the right.

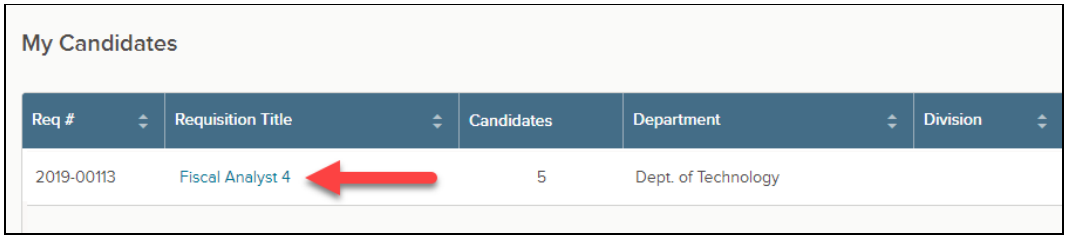


5. Click Save

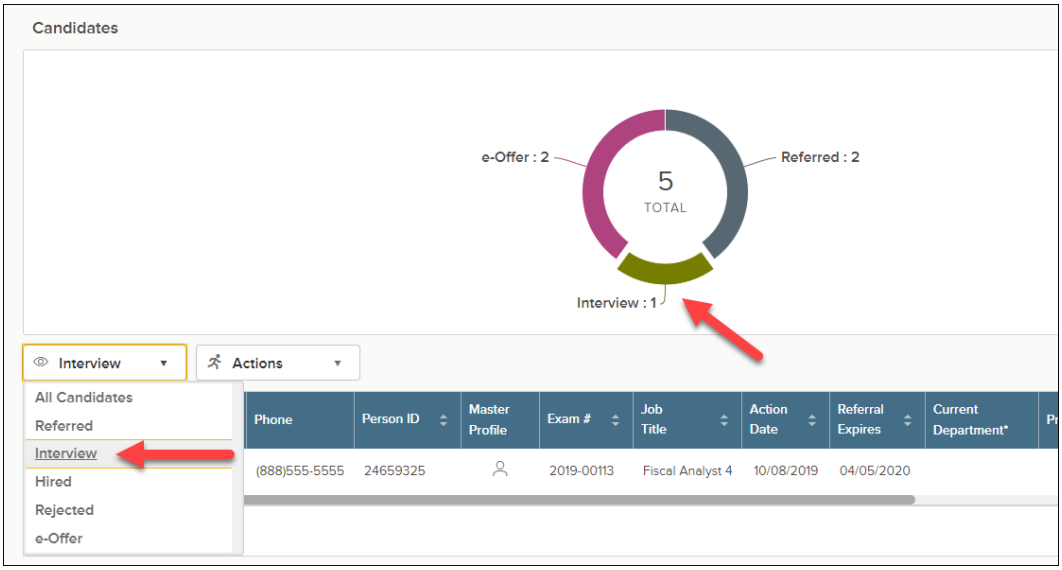
Steps to Send an e-Offer Letter

Now that you have created your offer letter template and enabled e-Offers in the hire workflow, you're ready to send the offer to the candidate.

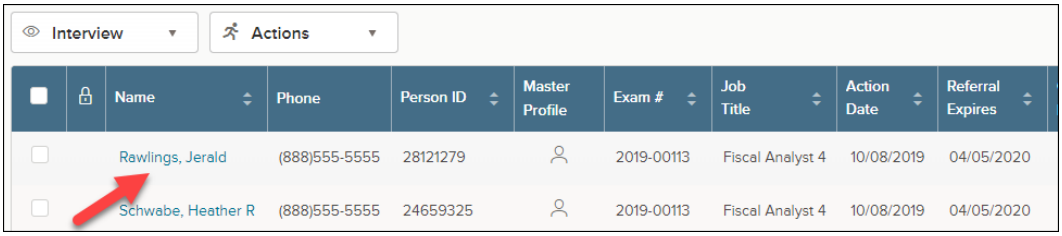
1. If you're not already viewing the referred list of candidates, return back. From the My Candidates section, click the referred list.



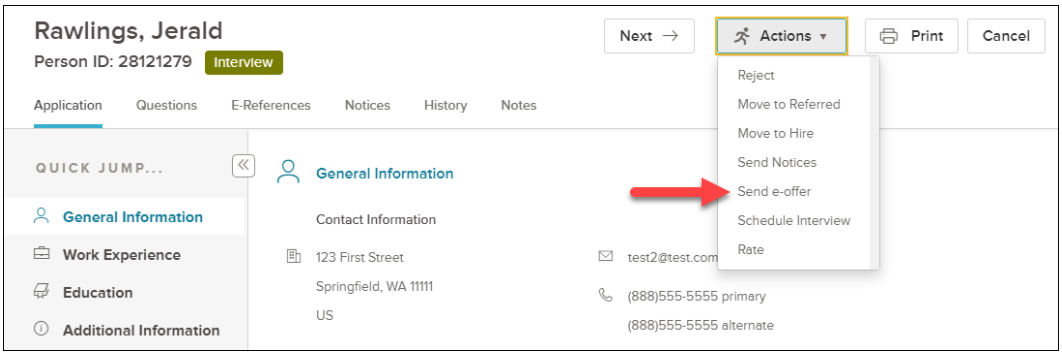
2. On the doughnut chart or on the Candidates menu, select the step name where the candidate to whom you want to make an offer currently resides.



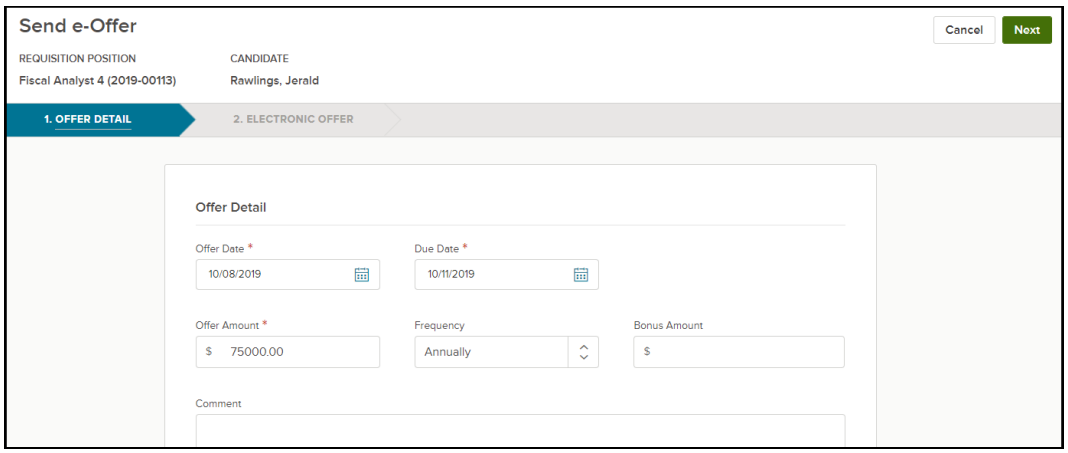
3. Click the name the candidate to receive the offer.



4. On the Actions menu, click Send e-offer.

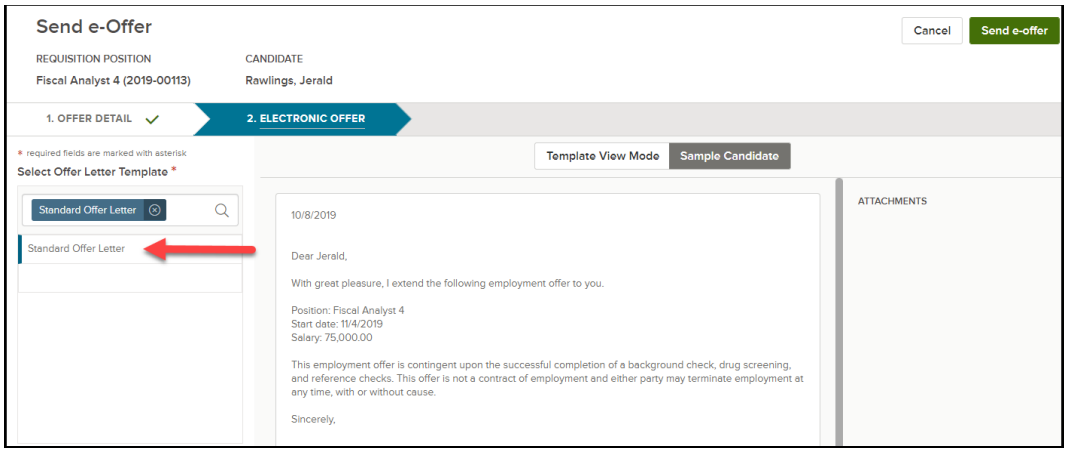


5. Enter the offer date, offer due date, offer amount, and frequency (e.g., annually), and any additional details including bonus amount and comments.



6. Click Next

7. Select the appropriate offer letter template and review the text carefully. Click the Sample Candidate button to see a preview of exactly how the letter will appear to the candidate.



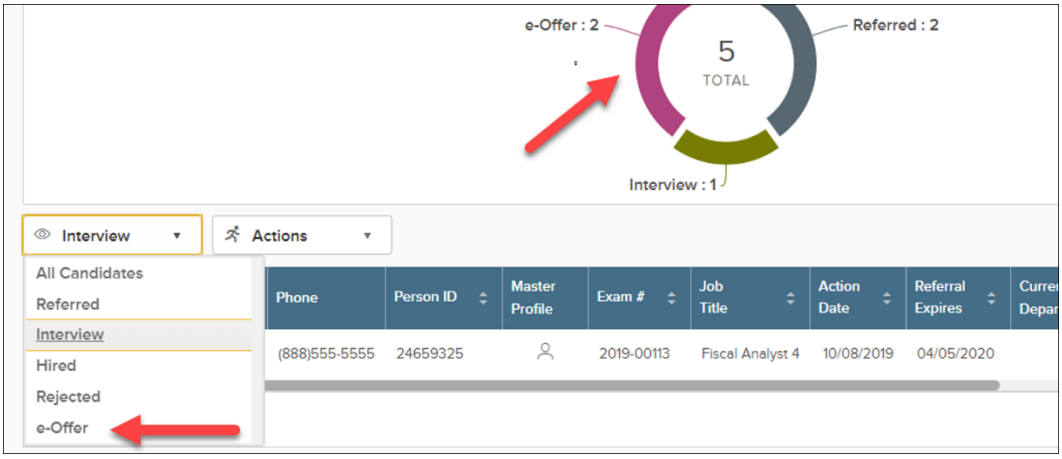
8. Click Send e-offer.

Steps to Review Offer Status

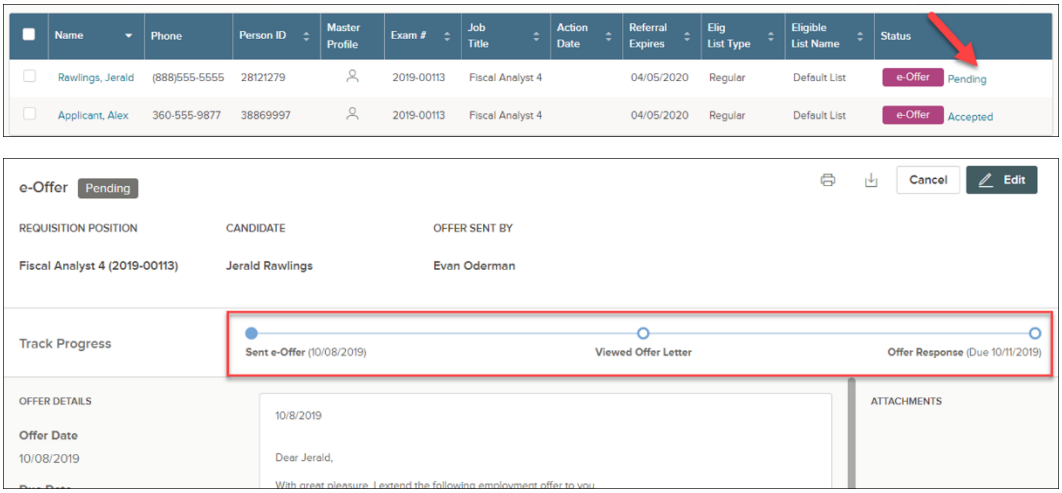
When a candidate accepts or rejects an offer, the hiring manager(s) assigned to the requisition will receive an email. To check the status of an offer:

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

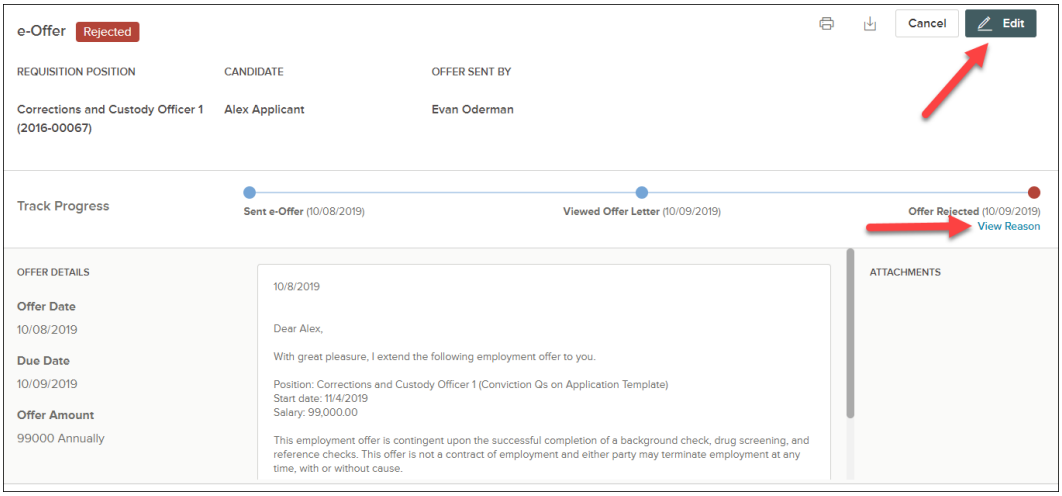
2. On the doughnut chart or on the Candidates menu, select the e-Offer step.

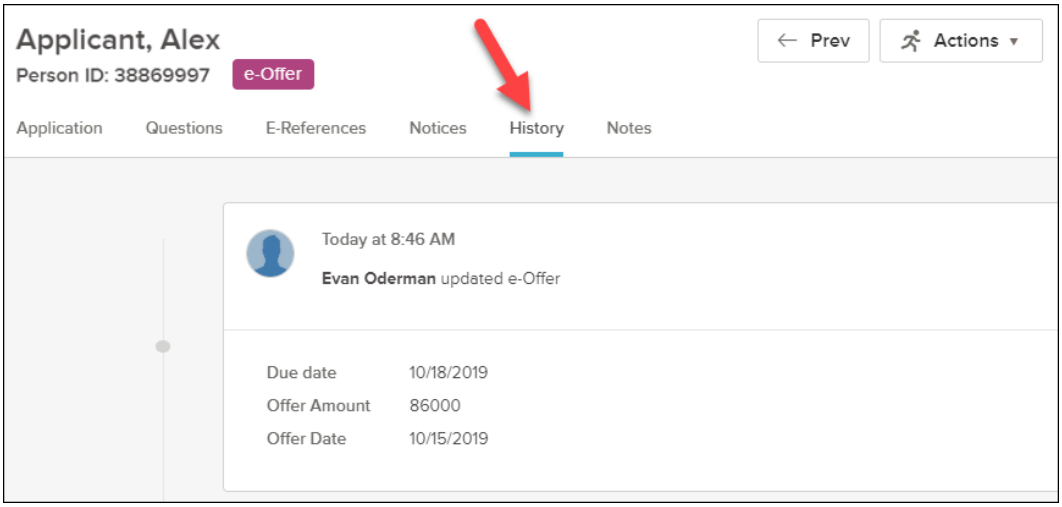


3. From the Status column, click on the current status. The progress bar displays the current status of the offer.



4. An offer that is still pending or that was been rejected can be updated and re-sent to the candidate if necessary. Candidates are prompted to enter a reason when rejecting an offer. Updates made to e-Offers are tracked in the candidate history tab. You can also print or download the offer letter from this page.





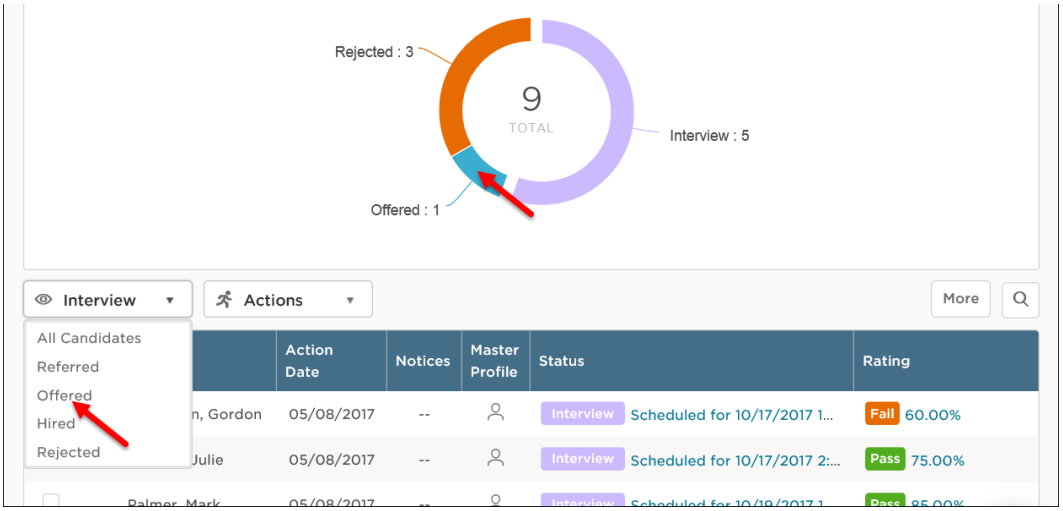
Hire a Candidate

Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can hire a candidate.

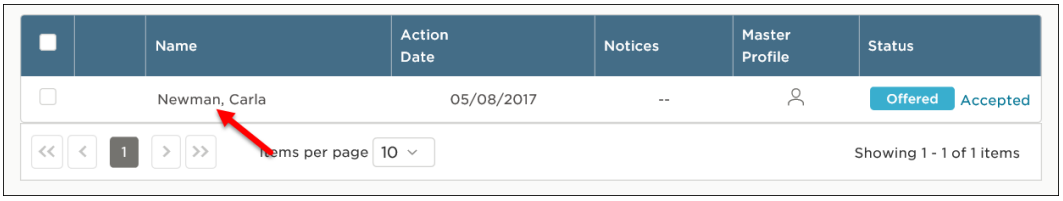
Steps to Hire a Candidate

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

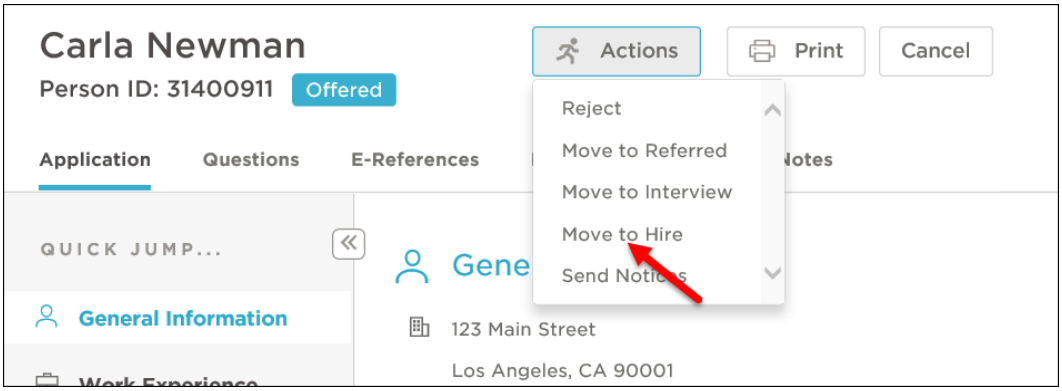
2. On the doughnut chart or on the Candidates menu, click the offered step.



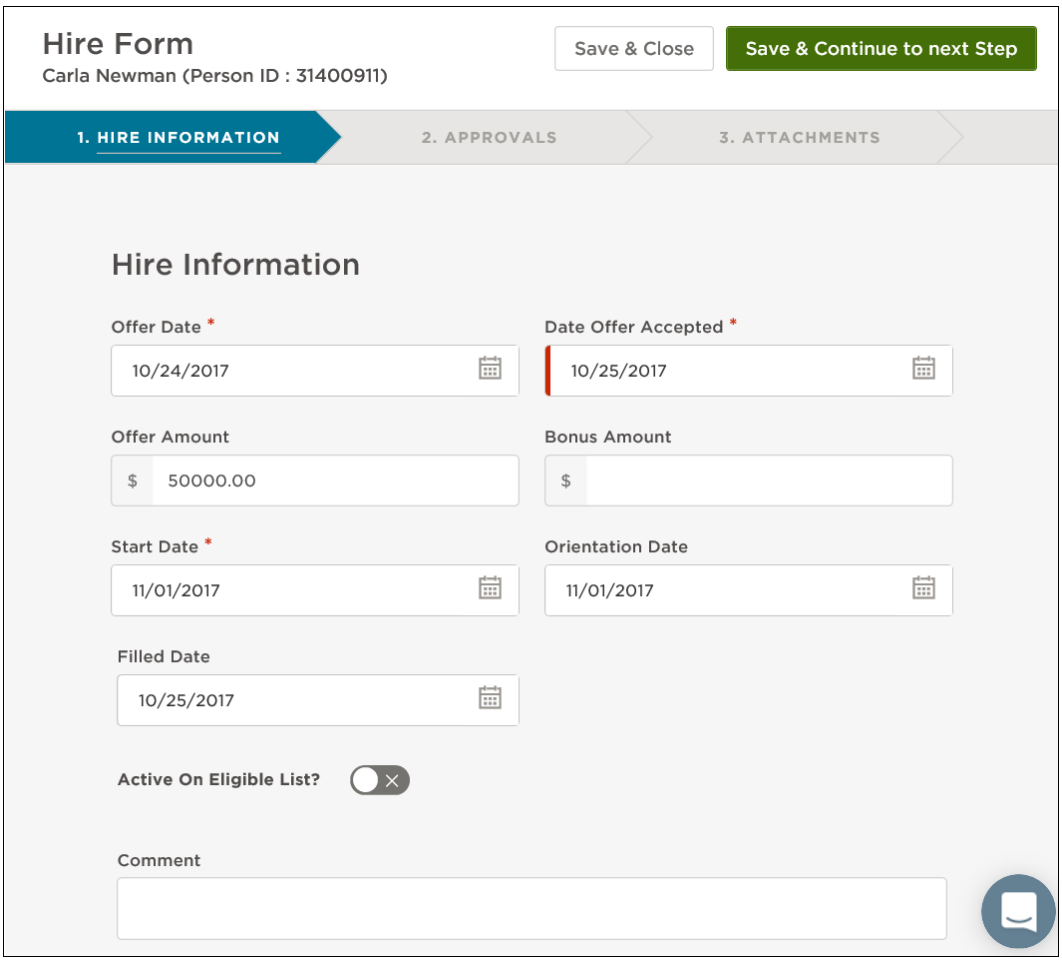
3. Click the name the candidate to hire.



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



5. Enter the start date and any additional details.



6. Once you're done, click Save & Continue to Next Step.

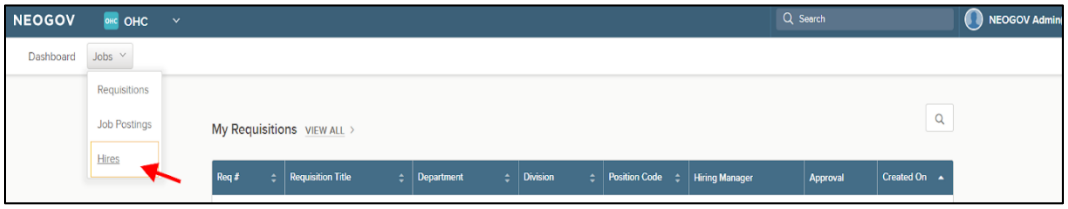
7. If your offer has already been approved, click Save & Continue to Next Step twice to skip the Hiring Approvals and complete the process.

View Hires

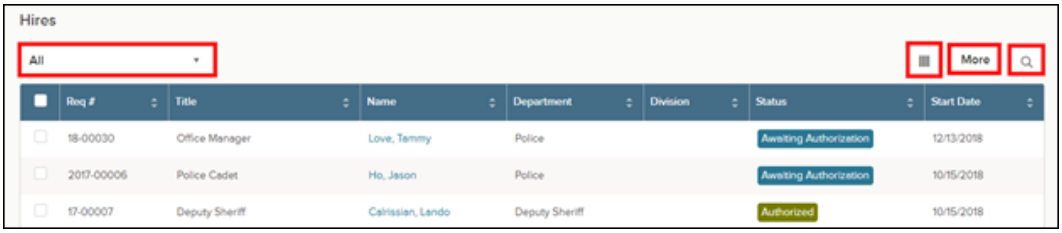
Required OHC role: With the OHC role of Hiring Manager or HR Liaison, you can view hires.

Steps to View Hires

1. On the Jobs menu, click Hires.



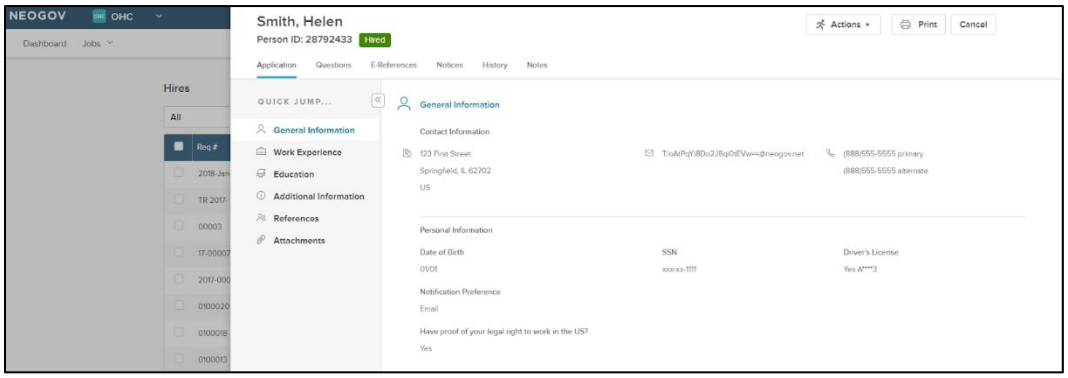
2. A listing of hires will display.



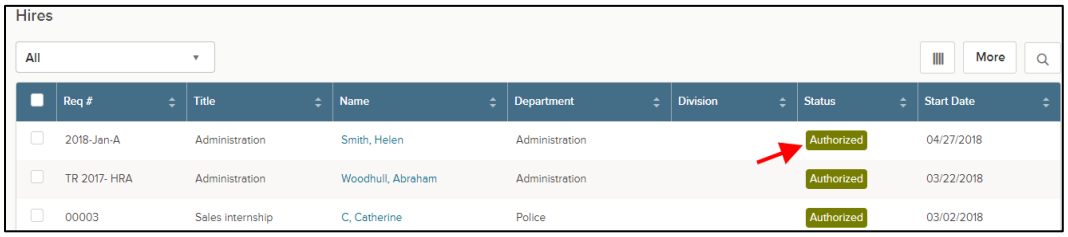
You have four available features:

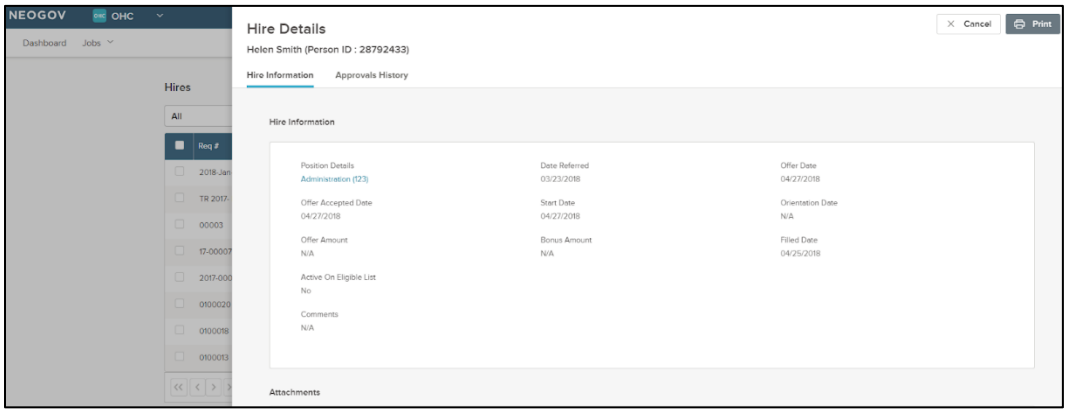
- On the Candidates menu, click the status of hired candidates for which you want to view.
- Click and select the columns for which you want to view.
- On the More menu, click Export to CSV.
- Click to search by various data including: requisition number and title, candidate's name, department, division and candidate's date.

3. Click the candidate's name to view their application.



4. Click the hired candidate's status to view the Hire Details page.





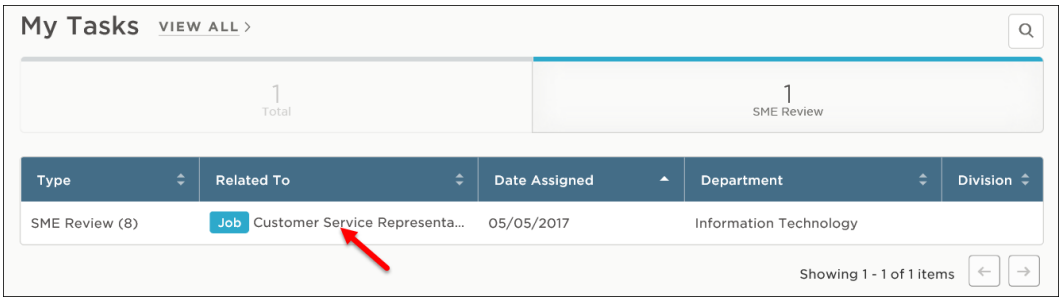
Print Applications

Required OHC role: With the OHC role of SME, Rater, Hiring Manager, or HR Liaison, you can print applications.

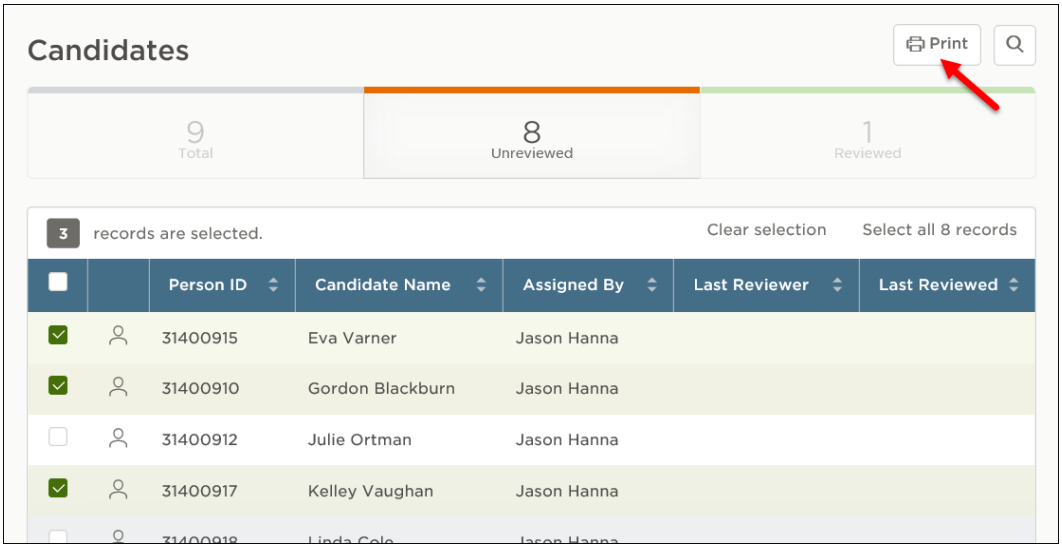
Steps to Print Applications

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

2. If you're assigned the OHC role of SME or Rater, go to the listing of candidates.



3. Select the candidates for which you need printed applications and click Print.



4. Alternatively, if you're assigned the OHC role of Hiring Manager or HR Liaison, go to the referred list of candidates.

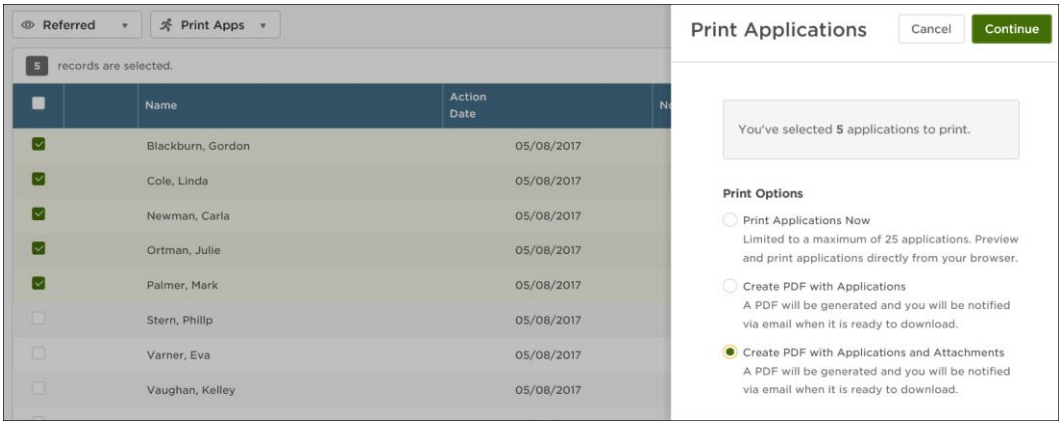
5. Select the candidates for which you need printed applications.

6. On the Actions menu, click Print Apps.

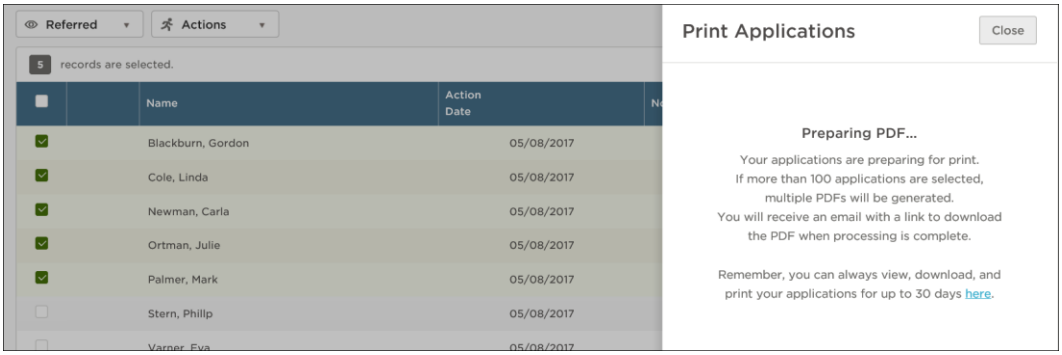
7. The Print Applications window will display. You have three options from which to choose:

   - Print Applications Now: Limited to 25 applications and requires a direct print from your web browser.
   - Create PDF with Applications: Creates a PDF of applications without candidates' uploaded attachments.
   - Create PDF with Applications and Attachments: Creates a PDF of applications with candidate's uploaded attachments (e.g., résumés, cover letters, college transcripts).

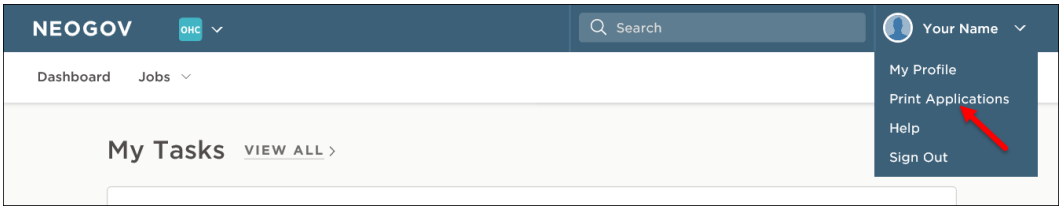
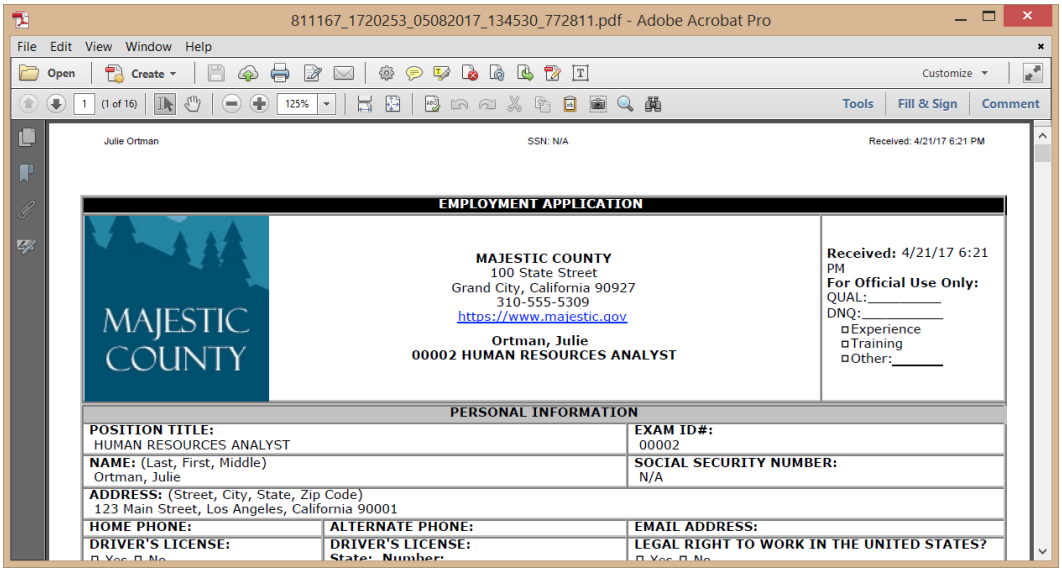
   Select your preferred printing option and click Continue.



8. If you selected either PDF download option, a confirmation window will display. You'll receive an email from support@neogov.com once your PDF is ready for download.



9. Go to your saved PDF. On the Profile menu, click Print Applications.



10. From the PDF column, click View for the saved PDF you want to download and/or print.