**Human Resources Office**
Rundell Hall, Room 201
Phone: 281.425.6875 • Fax: 281.425.6568
Email: hr@lee.edu • Website: www.lee.edu/hr

# NEOED/NEOGOV Online Hiring Center (OHC) User Guide

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# Introduction

The Online Hiring Center (OHC) allows hiring managers and approval groups to electronically participate in the hiring process from requisition to hire. The OHC enables managers to create requisitions to fill vacant positions online, electronically route the requisitions for approval, review applications and recommend a candidate for hire. In addition, Search Committee members can access the OHC to review and rate candidates.

If you need assistance with the OHC or have questions, please contact the Human Resources Office at hr@lee.edu or (281) 425-6875.

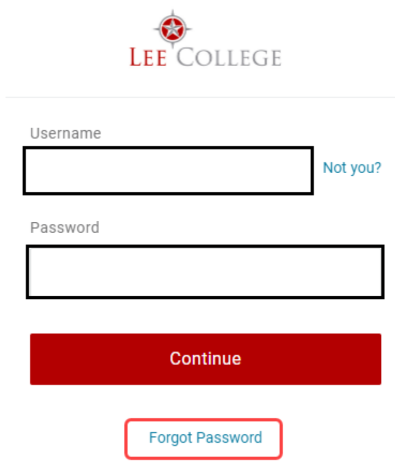
## Important Websites

Job seekers can view and apply for employment opportunities with Lee College online at https://www.schooljobs.com/careers/lee.

Hiring managers and Search Committee members can access NEOED's Online Hiring Center (OHC) through the College's Single Sign On (SSO) website.

# Getting Started: Log In to the Online Hiring Center (OHC)

Hiring managers and Search Committee members log into NEOED's Online Hiring Center (OHC) through the College's Single Sign On (SSO) website. Enter your IT assigned username and password on the login page.



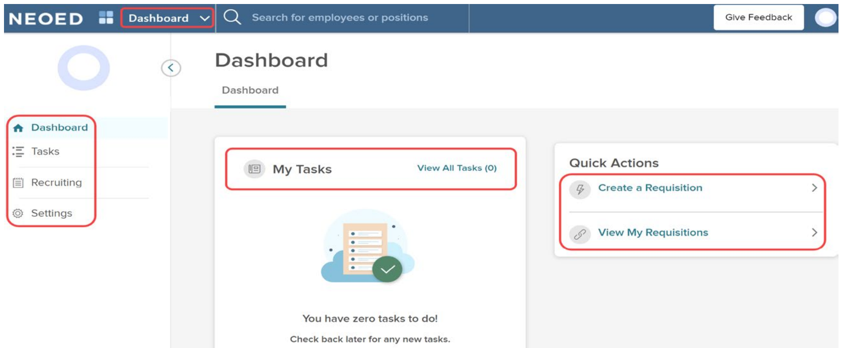

**Can't Login?**

If you need assistance logging in through SSO (i.e., issue with your network username and password), contact the IT Help Desk at helpdesk@lee.edu or (281) 425-6952.

If you are able to log in via SSO but cannot access the OHC, contact Human Resources for assistance at hr@lee.edu or (281) 425-6875. Not all employees have access to the OHC features, only hiring managers and Search Committee members.

# Dashboard (Unified Self-Service)

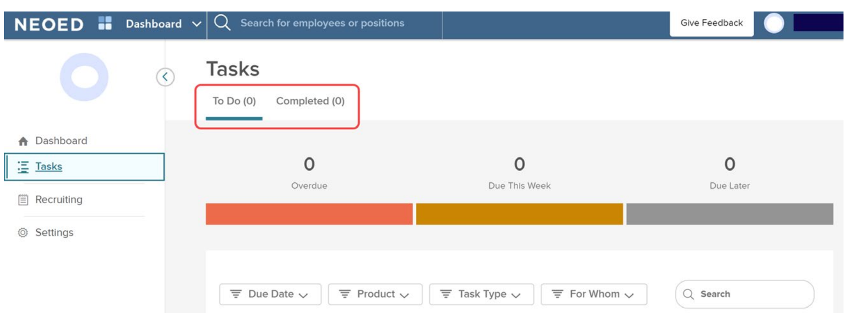
After signing into the system, the Dashboard module will display. This is a centralized area for items that require your attention (i.e., your assigned tasks, associated requisitions, referred candidates, and more). The Dashboard is a feature of NEOED's Unified Self-Service platform which acts as an information hub, centralizing tasks and actions for managers and employees into one easy to find location.




## Navigation Links on Dashboard

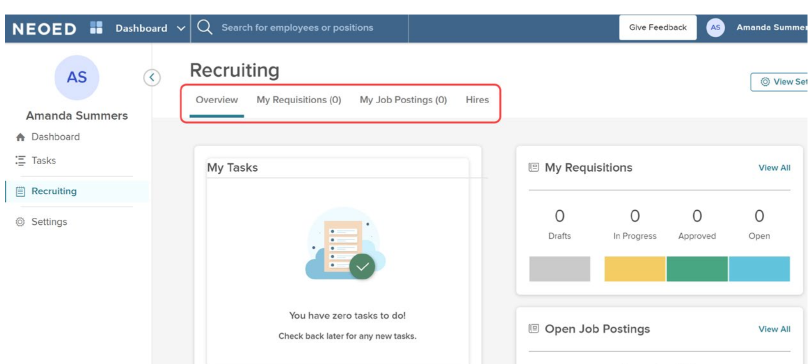
**Dashboard Home Page**: Clicking this icon displays the Dashboard home page shown above.

**My Tasks**: Stay on top of your to-do list by selecting the Task icon. View actions you need to take (e.g., reviewing or approving a requisition, rating candidates), as well as those you completed. The default view shows all tasks pending your review. Click on a colored bar to view tasks according to their deadlines (i.e., Overdue, Due This Week, Due Later). Use the filter and search fields to quickly locate specific tasks. Once a task is finished, it is moved to the Completed tab.




*TIP: You will receive system generated emails when your approval is needed and/or you have candidates to review or rate in the OHC.*

**Recruiting**: Clicking this icon provides a quick glance at your requisitions, job postings, candidates and hires.



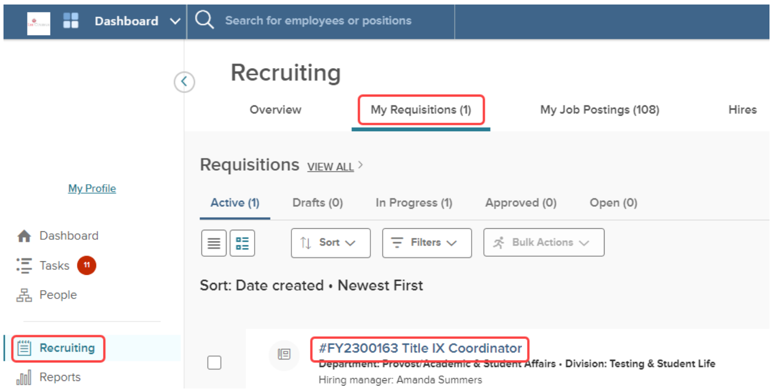
# Access Library of Job Descriptions

## Navigate to the Recruiting Module

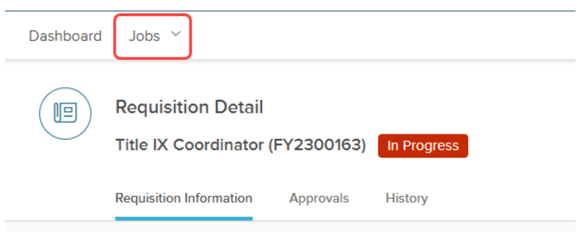
At this time, you must navigate into the Recruiting module to view the library of job descriptions. There are a few ways to do this (i.e., via My Requisitions, Open Job Postings or Recent Hires).

**I. My Requisitions**

From the Recruiting link, select the My Requisitions tab. Click the title of any requisition that displays.

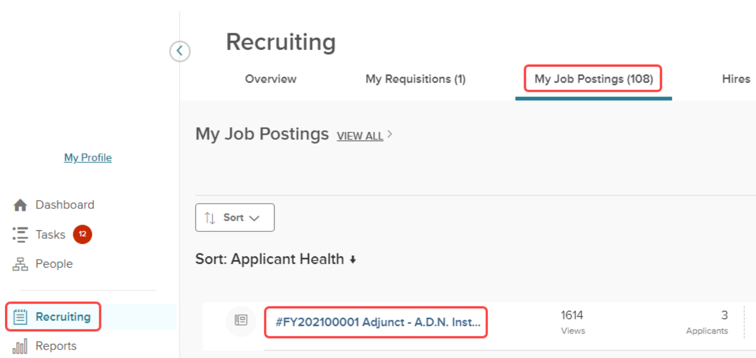



This navigates you into the Recruiting module. Click the Jobs menu in the upper left corner. Select Job Descriptions from the drop-down menu.

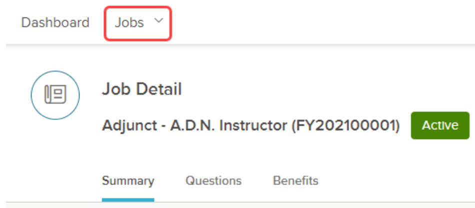



**II. Open Job Postings**

Similarly, you can also access the Recruiting module by selecting the Recruiting link > My Job Postings tab > and clicking the title of any posting that displays.

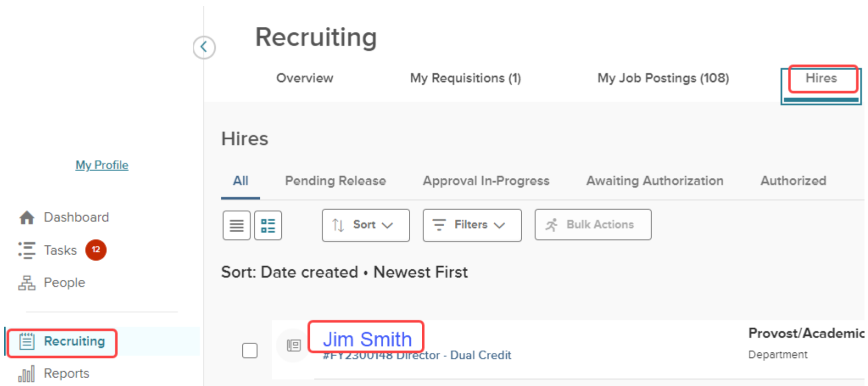


Click the Jobs menu in the upper left corner. Select Job Descriptions from the drop-down menu.

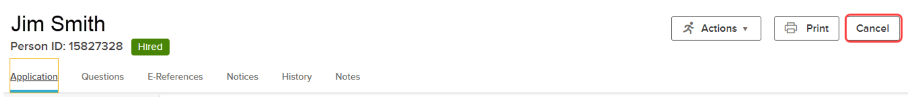



### III. Recent Hires

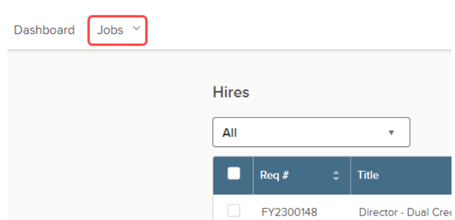
Select the Recruiting link > Hires tab > select any name that displays.




On the flyout screen that appears, click Cancel in the upper, right corner.

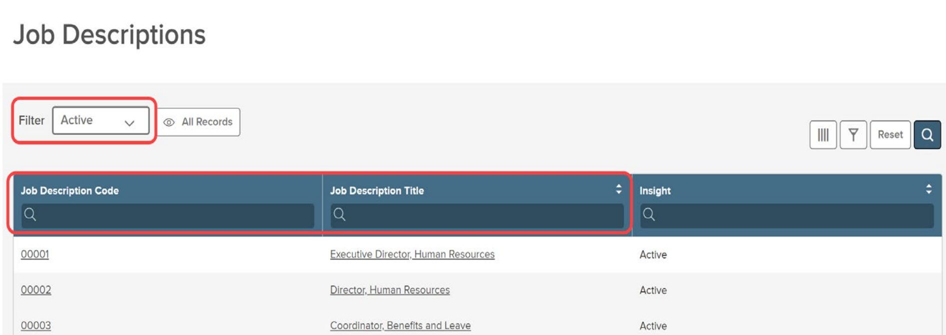



Click the Jobs menu in the upper left corner. Select Job Descriptions from the drop-down menu.

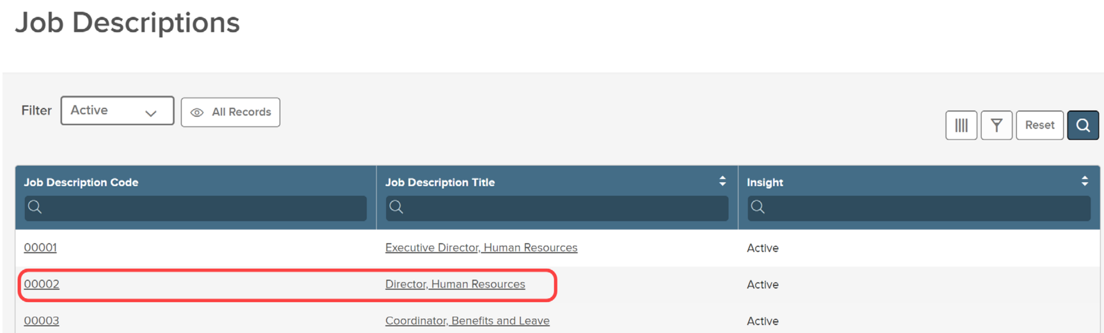


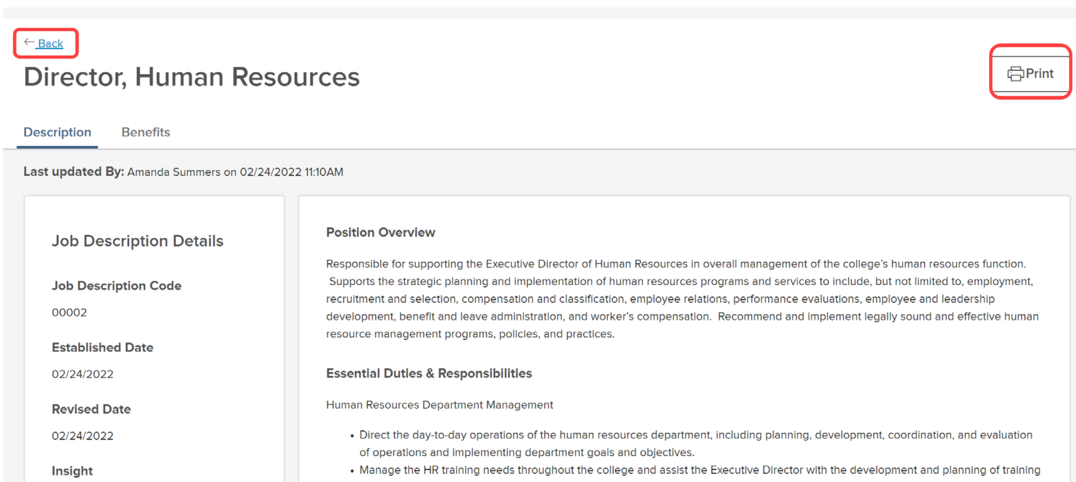

## Search/View Job Descriptions

There are a few ways to sort and search job descriptions. Use the Filter field to search for active and inactive descriptions. Use the Job Description Code or Job Description Title search fields to quickly identify positions.



To open/view a job description, click the link for the appropriate Job Description Code or Title.



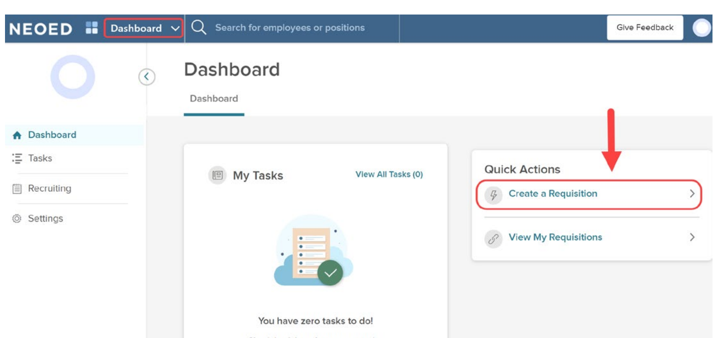

***IMPORTANT:*** *At this time, only Human Resources can create and edit job descriptions. To request a new description or update an existing one, contact Human Resources at [hr@lee.edu](mailto:hr@lee.edu) or (281) 425-6875.*

# Manage Requisitions (Position Requests)

## Create a Requisition

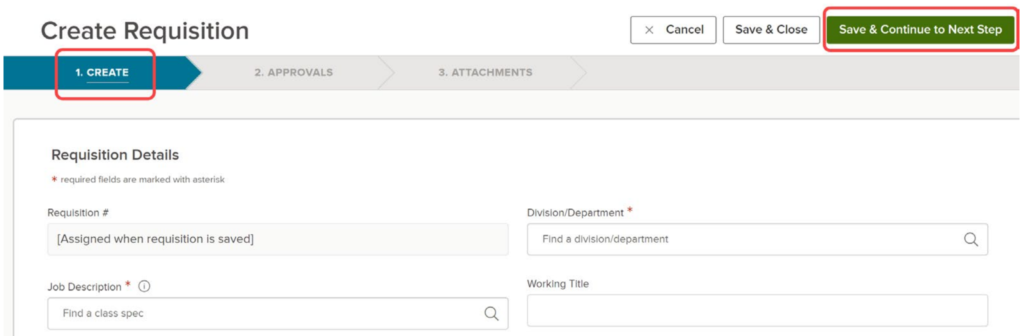
The requisition replaced the Position Request Form. When a hiring manager needs to fill a vacancy or create a new position, create/submit an electronic requisition in the OHC to request to fill the position.

To create a requisition from the Dashboard screen, find the Quick Actions section and click Create a Requisition.



This opens the online requisition form. You will see three tabs at the top of the screen (i.e., 1. Create, 2. Approvals and 3. Attachments). Follow the steps below to complete and submit your requisition:

1. On the Create tab, use the information below to fill in applicable fields. Fields marked with an asterisk (*) are required. After you fill in the appropriate information, select Save & Continue to Next Step in the top right corner to move to the Approvals tab.




**** IMPORTANT**: To properly complete the fields on the Requisition form, follow the instructions below. **

- **Requisition #**: This # is automatically assigned by the system after the requisition is submitted.
- **Division/Department***: Select the department this position will be assigned to. This is important because it determines which hiring managers will have access to the requisition, postings and candidates, as well as the options that will populate in the Position field below. At this time, the department cannot be updated later.
- **Job Description***: Select the position's job description. If the description is not available, please contact Human Resources to see if a new description needs to be created. Only Human Resources can add job descriptions at this time.
- **Working Title**: Enter the position's job title.
- **Desired Start Date**: Enter the desired start date (optional).
- **Hiring Manager***: Add the name of the person who will supervise this position, as well as the names of the supervisors in the chain of command who need access to view the activity of this position. For example, a request to hire a faculty member should include the names of the Division Chair, Associate VP of Academic Affairs and Provost. A request to hire an Academic Advisor would include the names of the Director of Advising & Counseling, Executive Director of College & School Partnerships, Associate VP of Student Affairs and Provost.
- **Search Committee Chair**: If known, enter the name of the employee who will chair the Search Committee for this position. (This information can be added later.)
- **Search Committee Members**: If known, enter the names of the employees who will serve on the Search Committee for this position. (This information can be added later.) *TIP: Employees added here can view applicants if you later allow it in the hiring workflow for this position (i.e., Review and/or Interview steps).*
- **Job Type**: Select full-time or part-time.
- **List Type**: Always select Regular.
- **Position:** Select the appropriate option. Options are determined based on the positions assigned to specific Departments (see Division/Department field mentioned above).
- **# of Vacancies**: Enter the # of vacancies you are requesting to fill with this request.
- **EEO/Census Data Template**: Skip this field. Do NOT enter information here.
- **Action Requested**: Select Create a New Position or Filling a Vacant Position.
- **Incumbent's Name (If Filling Vacancy)**: If applicable, enter the incumbent's name.
- **Position Type***: Select Faculty (Exempt), Faculty – Dual Credit ISD/HS, Administrative (Exempt), Classified Staff (Non-Exempt) or FWS/Student Assistant (Non-Exempt).
- **Employment Status***: Select Contract, At-Will or Letter of Appointment (Temporary Assignment Only).

- **Location***: Select Main Campus, McNair Center, Liberty Center, Huntsville Center or School District(s) in Service Area.
- **Salary Scale***: Select Faculty 9 Month, Faculty 12 Month, Administrative, Classified Staff, IT, Skilled Trades/Craftsman or Part-Time.
- **Classification (Non-Faculty Positions)**: For non-faculty positions, enter the classification/band for the position. For faculty positions, leave this field blank.
- **Estimated Annual Salary**: Enter the estimated salary.
- **Incumbent Salary**: Enter the incumbent's salary. You can obtain this information from Human Resources.
- **Estimated Budget Impact**: Select Increase to Budget, Decrease to Budget or No Change to Budget.
- **Estimated Amount of Change to Budget**: Enter the estimated amount of increase or decrease to the budget.
- **Funding Options**: Select Funds Already Budgeted, Reallocating Department Funds or Requesting New Funds.
- **Funding Source**: Select Lee College – Institutional Funds, Grant Funds or Other (e.g., salary split between Lee College and ISD). Add a brief description of "Other" in the Rationale for Requesting Position field.
- **Budget #**: Enter the budget # that will pay for this position.
- **Grant Title (If Applicable)**: Enter the grant name.
- **Anticipated End Date for Grant (If Applicable)**: Enter the grant's end date.
- **Rationale for Requesting Position**: Explain why you are requesting this position. Add any other information you feel is necessary for the Cabinet to review this request.
- **Applicant Type**: Select if the posting will be advertised to Internal Applicants Only or Internal and External Applicants.
- **Position Details – New Position, Comments**: Skip these fields. Do NOT enter information here.

2. On the Approvals tab, select the appropriate supervisors in the chain of command who must review and approve this requisition (i.e., request to create a new position or fill a vacancy).

   ***IMPORTANT:*** *If you do <u>NOT</u> need approval for your requisition (e.g., creating adjunct pools or student worker applications), skip this step by clicking Save & Continue to Next Step.*

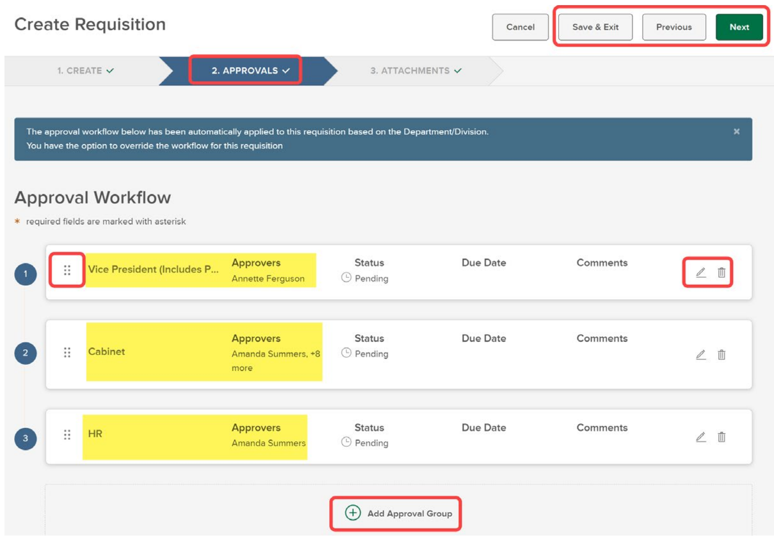
   There are two ways to create an approval workflow:

   **A.) Edit the Template/Draft Approval Workflow**

   In most instances, a template/draft approval workflow will populate based on the department assigned to the requisition. The screenshot below provides an example of an approval workflow for Finance & Administration.

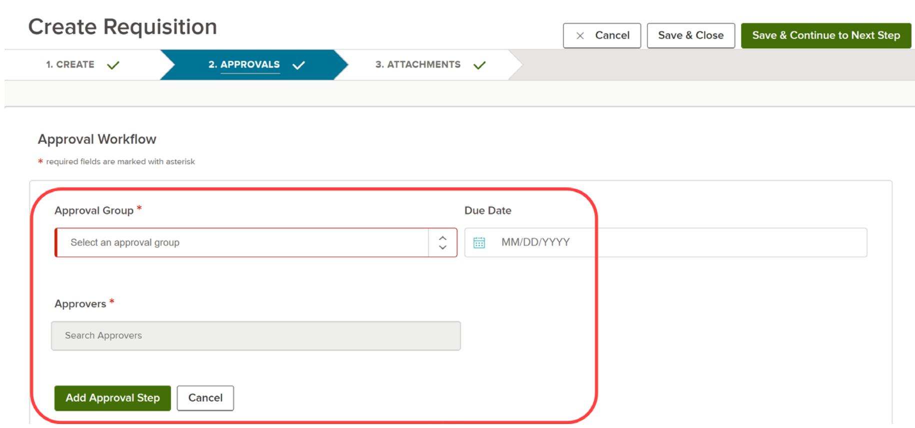
   Edit the workflow to ensure you forward the request to the appropriate supervisors for their review and approval.

   - Select and drag to reorder the steps of the workflow.
   - Select to delete an approval step.
   - Select to change the Approval Group and/or Approver names.
   - Select + Add Approval Group to add a new approval step.
   - Select Next to save and move to the last step in the Create Requisition process (i.e., 3. Attachments).
   - Select Previous to return to the previous page (i.e., 1. Create).
   - Select Save & Exit to save your work and come back later to finish it.



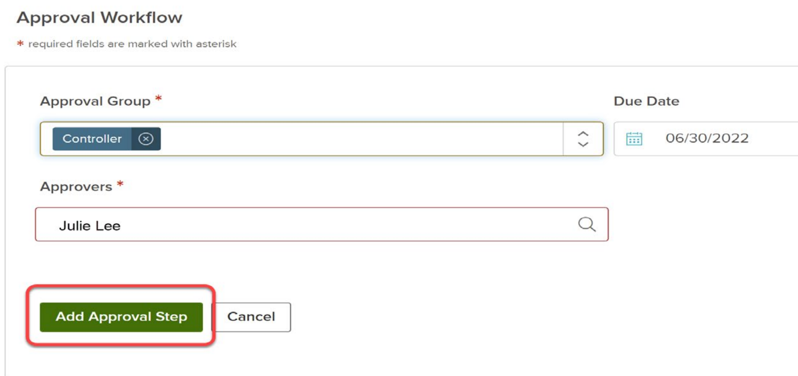

## B.) Create Your Own Approval Workflow

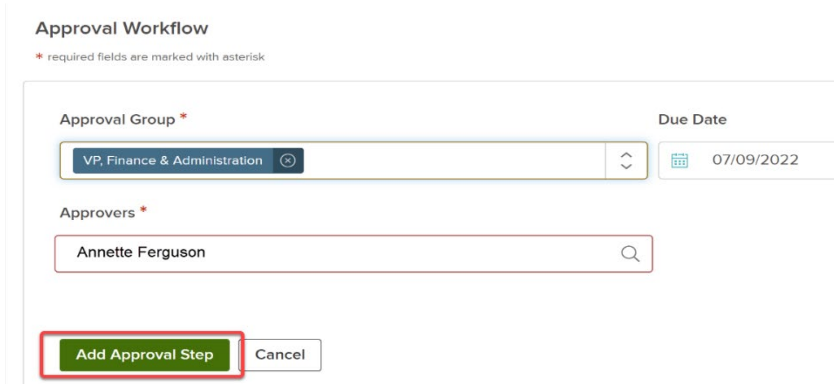
1. Click + Add Approval Group.
2. In the Approval Group field, select the first supervisor you want to forward the request to from the drop options.
3. Optional - Enter a deadline for the supervisor to review the requestion in the Due Date field.
4. In the Approver's field, select the name of the supervisor. Please note that supervisor names are currently tied to options in each Approval Group. If you need assistance finding a supervisor name, contact Human Resources at hr@lee.edu or (281) 425-6875.
5. Click Add Approval Step.

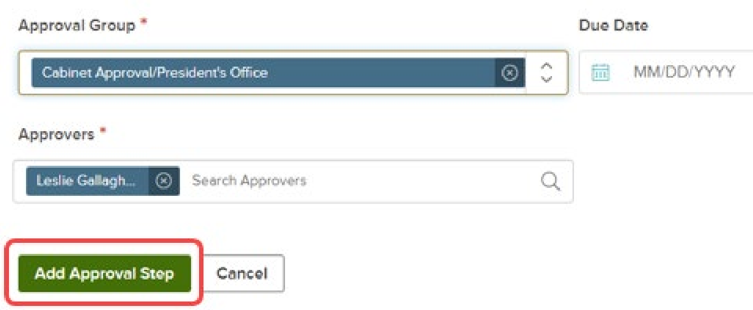



6. If you need to forward the requisition to multiple supervisors in your chain of command for approval, select the green Add Approval Step button. Repeat the steps above to enter the next supervisor approval(s) you need to collect.

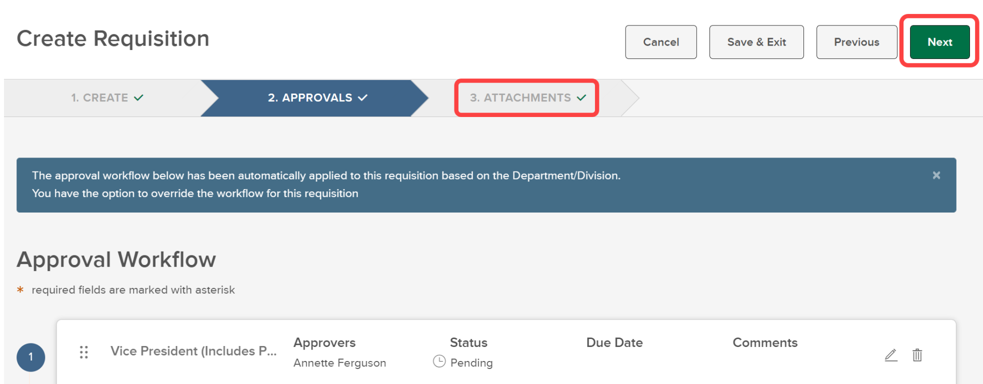
   After the first supervisor reviews and approves the requisition, the system will automatically forward the request to the second person listed in your approval workflow. All parties will receive an automatic email from the system letting them know they need to complete a task. See the example below.



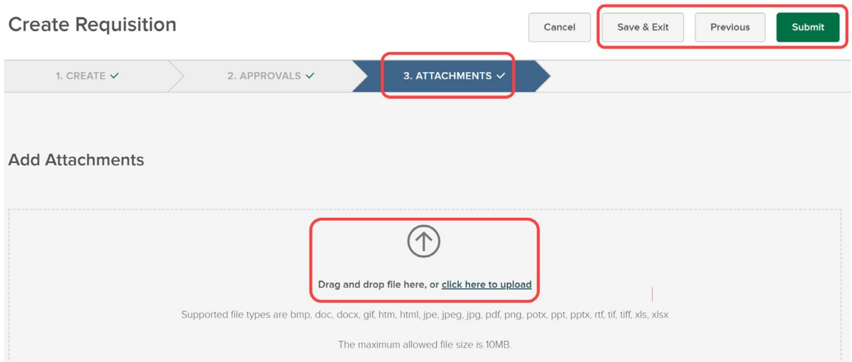




7. Once you finish entering your approval workflow, select the Attachment tab or Next.



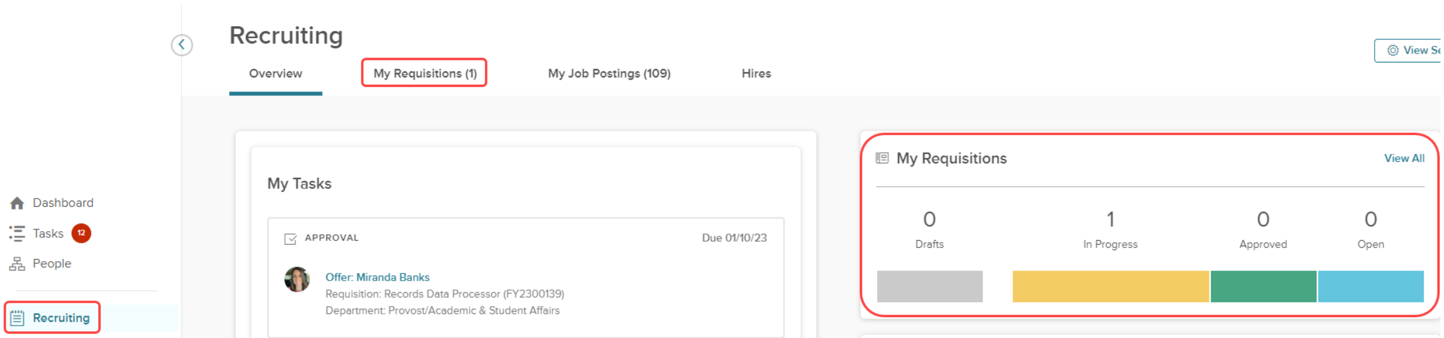

3. On the Attachments tab, upload position-related documents you would like to submit with this requisition. This step is optional. Select the Save & Exit box in the upper right corner to save the information you entered so far and come back later. Click Previous to go back to the Approval tab or select Submit to electronically forward your completed requisition (i.e., request to fill a vacancy or create a new position).




## View/Locate Requisitions

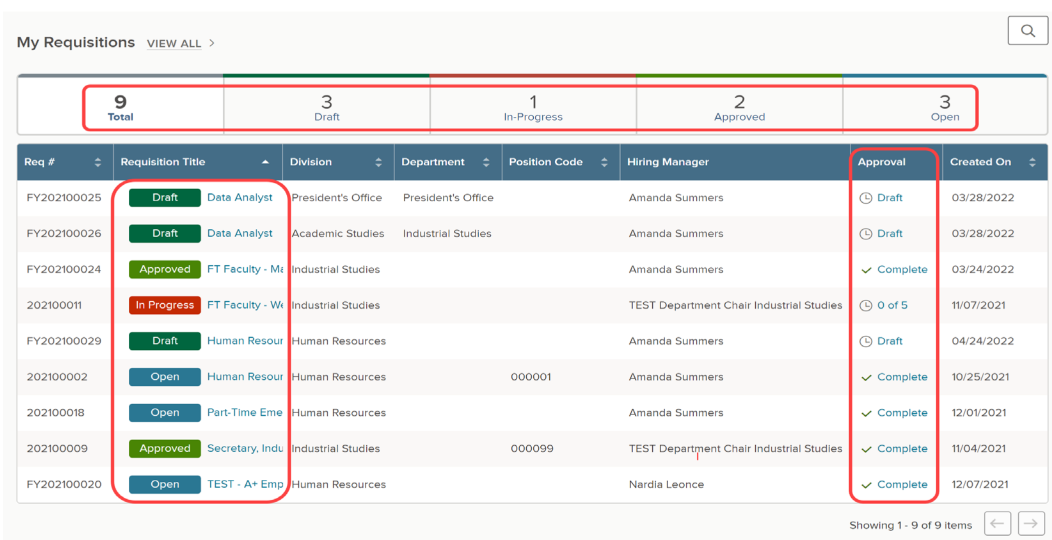
***Important:*** *Only employees/supervisors identified in the Hiring Manager field on the requisition can search and view requisitions. If you cannot see a requisition, you may not have been assigned as a hiring manager (or supervisor in the chain of command). Contact Human Resources for assistance ([hr@lee.edu](mailto:hr@lee.edu) or (281) 425-6875).*

To find/view requisitions and their respective statuses, select the Recruiting link. From here, you can select the My Requisitions tab or click a field in the My Requisitions section (which takes you to the My Requisitions page).




When viewing your list of requisitions:

- The Approval column on the right indicates which step the requisition is in within the process (i.e., draft, # of approvals obtained/still needed or completed). Click this link to open the requisition to view specific details, such as who was assigned in the approval workflow.
- The status of the request (i.e., Draft, In Progress, Approved, Open, Filled and Cancelled) is displayed in the colored boxes in the Requisition Title column.

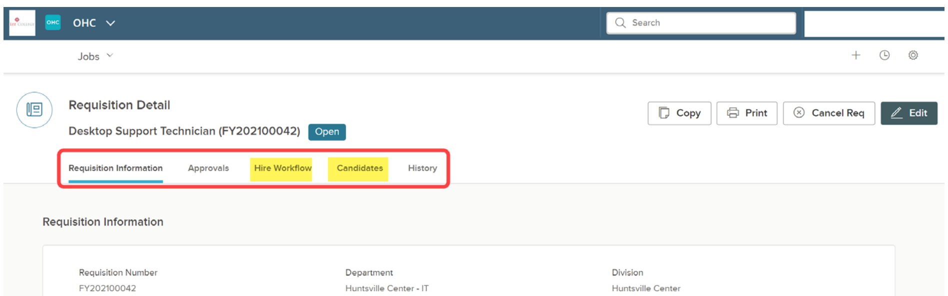



| Req # | Requisition Title | Division | Department | Position Code | Hiring Manager | Approval | Created On |
|---|---|---|---|---|---|---|---|
| FY202100025 | Draft Data Analyst | President's Office | President's Office | | Amanda Summers | Draft | 03/28/2022 |
| FY202100026 | Draft Data Analyst | Academic Studies | Industrial Studies | | Amanda Summers | Draft | 03/28/2022 |
| FY202100024 | Approved FT Faculty - Ma | Industrial Studies | | | Amanda Summers | Complete | 03/24/2022 |
| 202100011 | In Progress FT Faculty - We | Industrial Studies | | | TEST Department Chair Industrial Studies | 0 of 5 | 11/07/2021 |
| FY202100029 | Draft Human Resour | Human Resources | | | Amanda Summers | Draft | 04/24/2022 |
| 202100002 | Open Human Resour | Human Resources | | 000001 | Amanda Summers | Complete | 10/25/2021 |
| 202100018 | Open Part-Time Eme | Human Resources | | | Amanda Summers | Complete | 12/01/2021 |
| 202100009 | Approved Secretary, Indu | Industrial Studies | | 000099 | TEST Department Chair Industrial Studies | Complete | 11/04/2021 |
| FY202100020 | Open TEST - A+ Emp | Human Resources | | | Nardia Leonce | Complete | 12/07/2021 |

Requisition statuses are described below.

- **Draft** – Manager started/created a requisition but has not submitted it yet.
- **In Progress** – Requisition was submitted and is in the process of obtaining electronic approvals.
- **Approved** – Requisition was submitted, and all approvals were obtained. Human Resources moves Approved requisitions to Open status and creates a job posting.
- **Open** – Requisitions are engaged in the hiring process (i.e., job posted, applications accepted, committee reviewing applicants, etc.). Human Resources and the hiring manager/Search Committee are working together to fill the position.
- **Filled** – A candidate was selected and hired for this position. The request for the position was filled and closed.
- **Cancelled** – Request to fill this position was cancelled.

*TIP: Clicking a requisition in the Open or Filled status opens the requisition and allows you to view the original requisition and access the Candidates and Hiring Workflow tabs. This is helpful later when you want to view candidates for a position and move them through the search/hiring steps.*

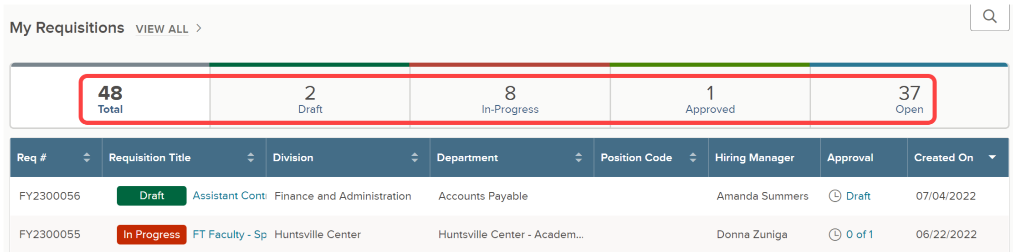



- Lastly, click on any of the requisition status options at the top of the section to quickly view/identify requisitions in each step of the approval process. For instance, selecting View All or Total will display all requisitions. However, clicking Draft, In Progress, Approved or Open will only display requisitions currently within those steps.

*Tip: Your view of this information may vary slightly depending on whether you are in the Dashboard or Recruiting/OHC module. Regardless of the look, the information is the same.*

**Dashboard View**

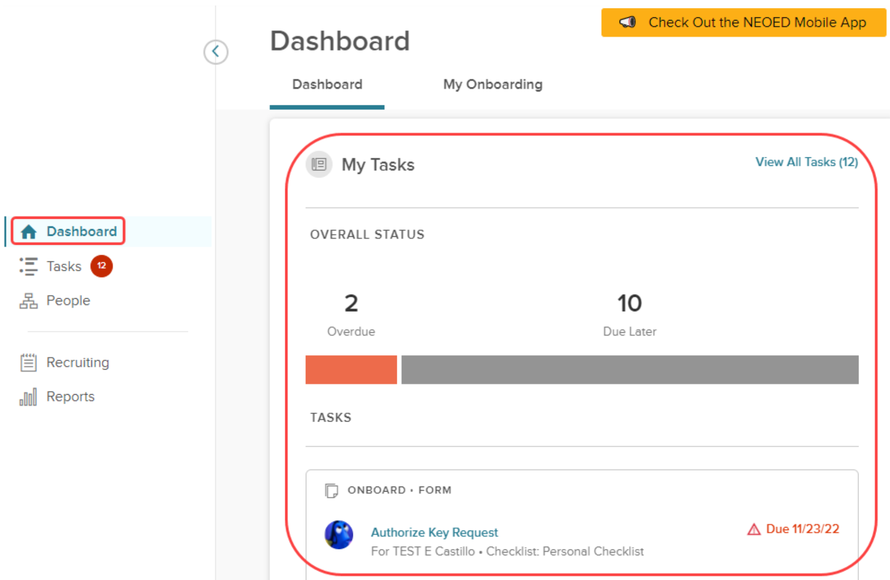
**Recruiting/OHC Module View**



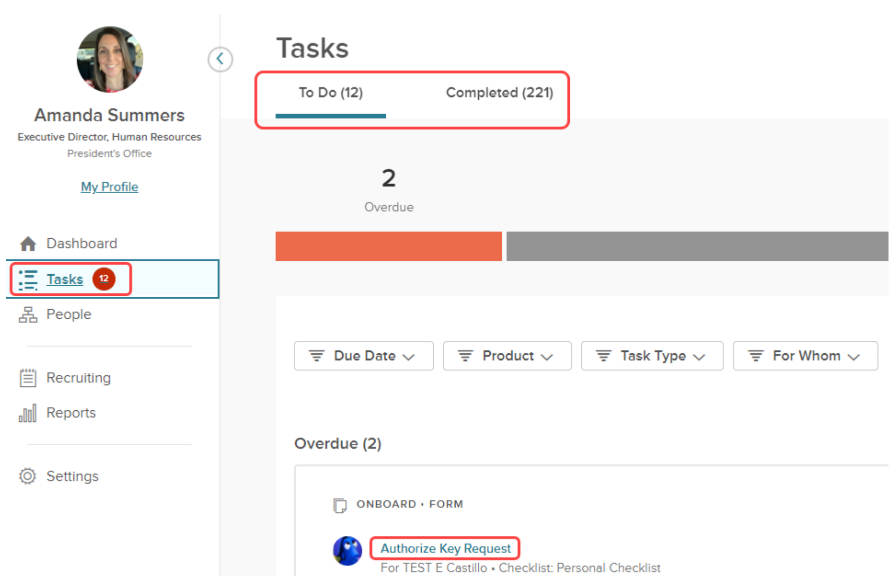

## Approve a Requisition

If you are assigned an Approver role in the system, you can view requisitions sent to you for approval in the My Tasks section of the Dashboard. There are two ways to access your tasks from the Dashboard:

1. A shortcut to your tasks is provided on the Dashboard's home page. Select the approval task you need to complete.




2. Click the Tasks link. Under the To Do tab, select the approval task you need to complete. To view tasks you already finished, click the Completed tab.



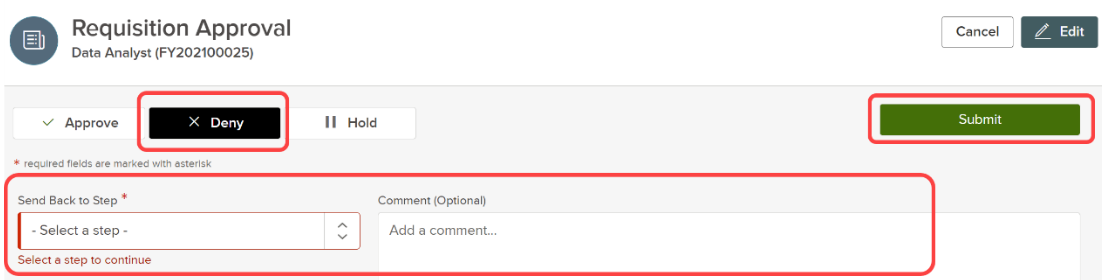
On the Requisition Approval page, review the information submitted in the Requisition Details section. If you have access, you can click the Edit button in the top right corner of the page to make changes to the form. After you review the request, take one of three actions: Approve, Deny or Hold the Request.

**Approving a Requisition**
Select the Approve box, enter comments about this request if you like (optional), and click Submit to forward the electronic requisition to the next approver or step in the process.


An automatic email will be sent to the next approver in the process (or Human Resources if no further approvals are required).

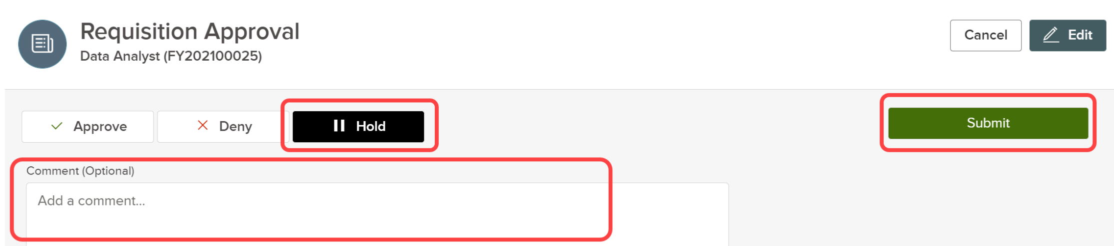
On your Dashboard, the requisition will show as "In Progress" unless you are the final approver. The status will change to Approved after the final approval is obtained.

**Denying a Requisition**
If you do not approve a requisition or want the manager to make changes, click the Deny box, select who to send the requisition back to, enter a comment about why you are taking this action (optional), and click Submit.




An automatic email will be sent to the appropriate user.

**Putting a Requisition on Hold**
To pause the approval process, select Hold, enter a comment explaining why you took this action (optional), and click Submit.




An email will automatically be sent to the creator of the requisition. The creator will see the requisition on his/her dashboard under "On Hold Requisitions."

***IMPORTANT: Approval Groups with Multiple Approvers Assigned***

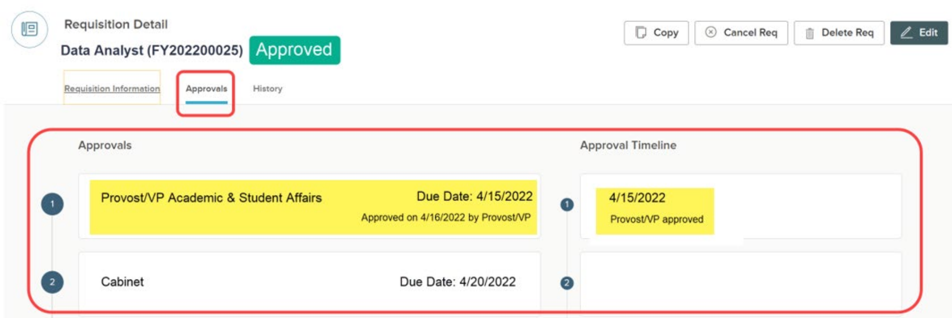
*Only <u>one</u> person per Approval Group can approve a requisition. This is important because some Approval Groups may have multiple employees assigned to them, all authorized to approve a request. If you are assigned to an Approval Group that has multiple people, please note that approval is on a first come basis. Since only one person in the group can approve it (and everyone assigned to the group is notified of the task), the first person in that group to process the request finishes the task. For example, if multiple HR members are assigned to the HR Approval Group, the first person to approve the requisition completes the task and moves it to the next step.*

***IMPORTANT: Cabinet Approval***

*At this time, Cabinet approval is not processed through the OHC. Instead, after requisitions are forwarded to a Vice President for approval, each Vice President will email the Cabinet members to make them aware of the request. The Vice Presidents will track approvals and notify Leslie Gallagher, designated representative for the President's Office, when the Cabinet approves a requisition. Ms. Gallagher will then electronically approve the requisition in the OHC on behalf of the President's Office, forwarding the request to Human Resources for processing.*

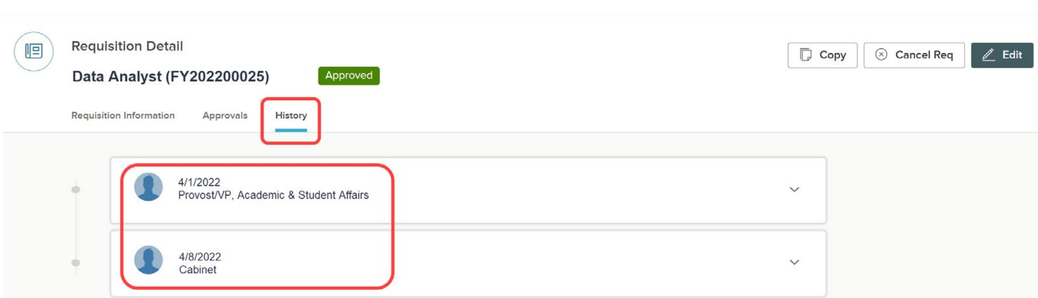
## View the Approval Workflow and/or History of Approvals

To see where the requisition is in the approval workflow, go to the Dashboard, scroll to the My Requisition section, select the requisition, and click the Approvals tab.




In the example above, you see the first step in the approval workflow was to obtain the Provost's approval. The due date for this approval was 4/15/2022. The Provost approved the requisition on 4/16/2022, but you are still waiting on approval from the Cabinet (i.e., the second step in the approval workflow).

To view the history of approvals/actions taken on requisitions, go to the Dashboard, scroll to the My Requisition section, select the requisition, and click the History tab.

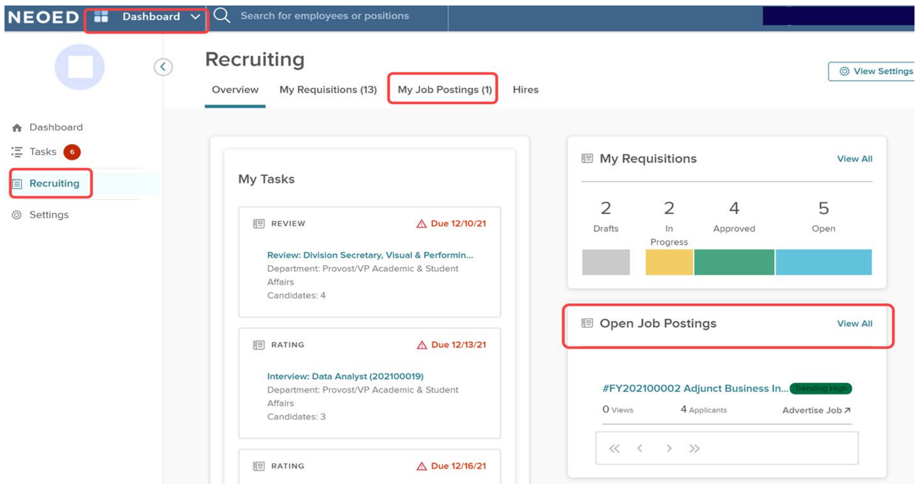


# View Job Postings

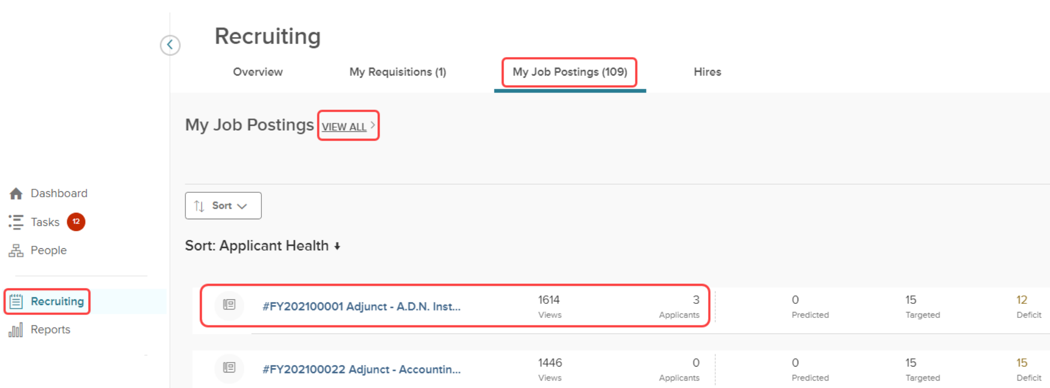
After a requisition is approved by the Cabinet, Human Resources will create a job posting.

***Important:*** *Only employees/supervisors identified in the Hiring Manager field of the Requisition can search and view postings. If you cannot see a posting, you may not have been assigned as a hiring manager (or supervisor in the chain of command). Contact Human Resources for assistance at [hr@lee.edu](mailto:hr@lee.edu) or (281) 425-6875.*

To access/view your job posting from the Dashboard, select the Recruiting link > find the Open Job Posting section under the Overview tab > click View All or click the My Job Postings tab.




A listing of your postings will appear. Click the title of the posting you want to view. Click View All to navigate into the Recruiting module.




If you select View All, you are navigated into the Recruiting module. A list of your postings will display in a different format.

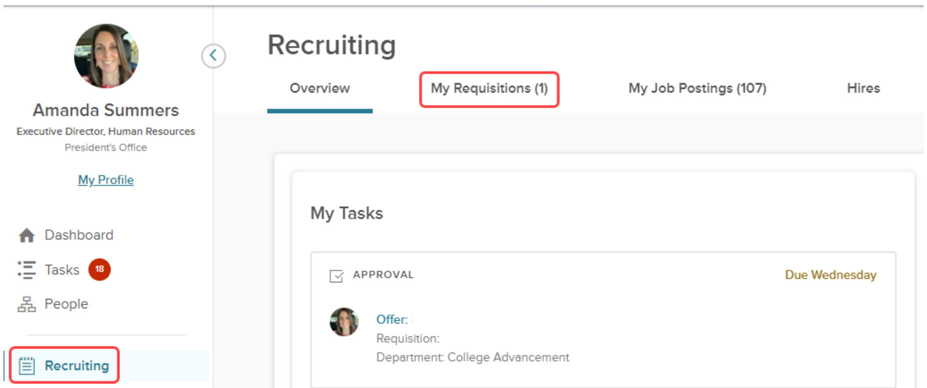
- Filter the list to view postings by status. Select the All v button and pick the status you want to view (i.e., All, Current, Archived, Pending or Expired).
- To sort data alphabetically or chronologically, click in the appropriate column header.
- Click the to open search options for applicable columns.
- Select the Job Title for the posting you want to view.

# Process Applicants/Candidates

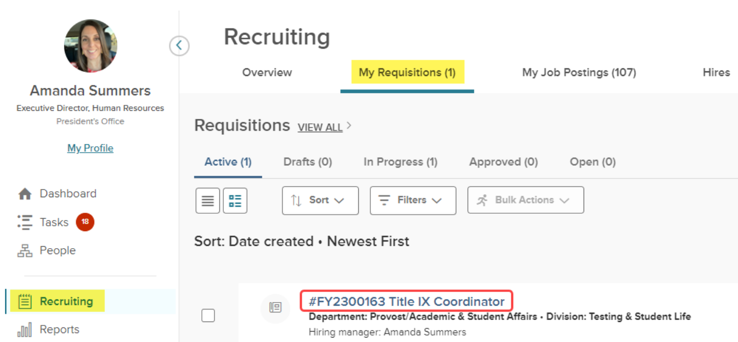
## Review Job Applicants/Candidates

To view applicants who applied to your positions, navigate to the appropriate requisition.

1. From the Dashboard, select the Recruiting link > My Requisitions tab.




2. Click the name of the position/requisition in which you are trying to view applicants.

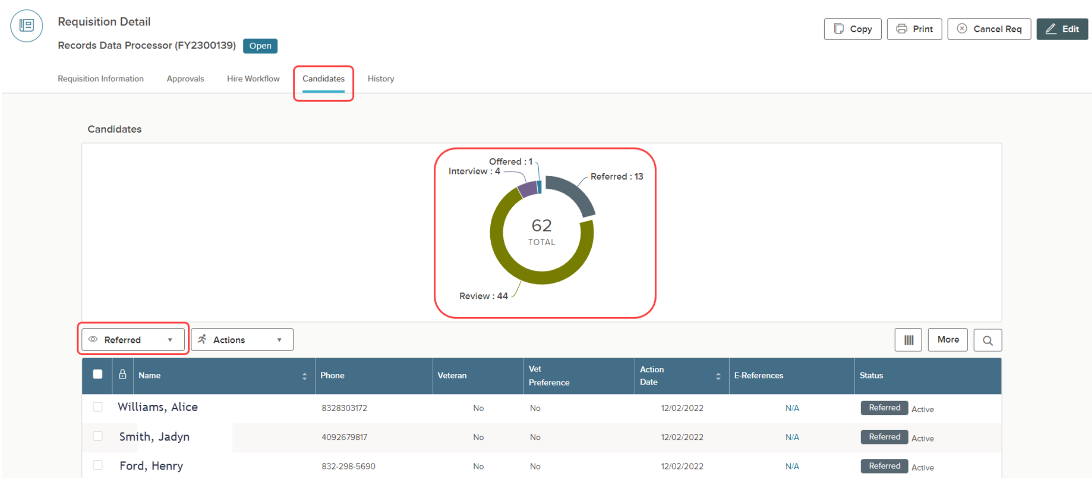



3. The Requisition Detail page will appear. Select the Candidates tab to view applicants for the position.
   - If you do not see the candidates tab, click the Approvals tab to confirm the appropriate supervisors approved the requisition. HR cannot create job postings without the appropriate approvals. If the approvals were obtained and you still do not see the Candidate tab on the Requisition Detail page, contact Human Resources at hr@lee.edu or (281) 425-6875 to inquire about the posting/applicants.

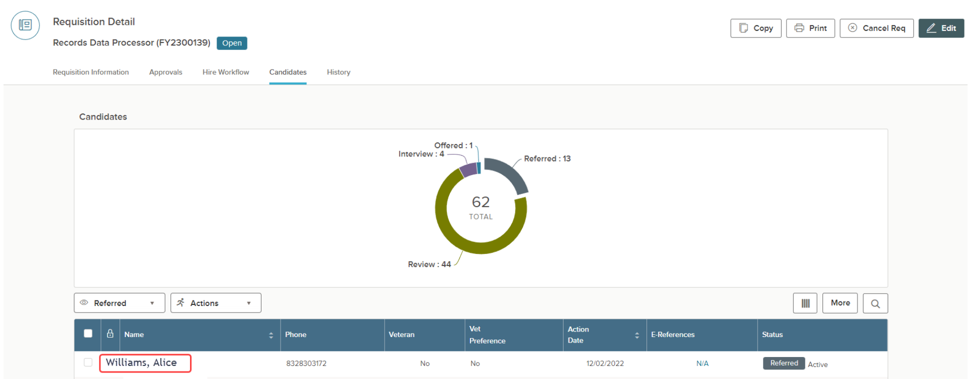
   Candidates initially appear in the Referred List status. However, you can sort and view candidates who are assigned to different steps in the hiring workflow (e.g., Referred, Review, Interview, Offered or Hired) in two ways:

   A.) Select the Referred drop-down link and change it to the appropriate list/status you want to view or

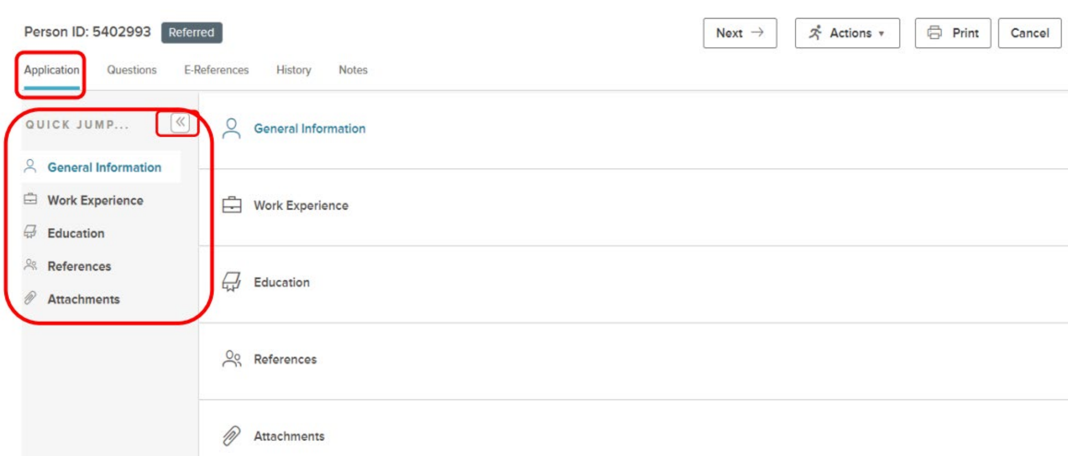
   B.) Click the appropriate section of the donut chart to open the list of candidates assigned to this area.



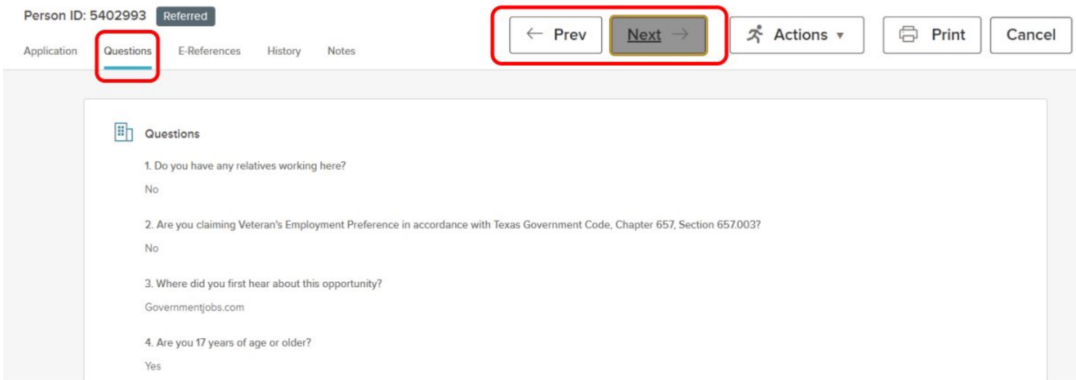

4. Click a candidate's name to open/view the applications.




5. When the application opens, click the options under Quick Jump to view the different sections of the candidate's application. Select << to the right of Quick Jump to minimize the navigation bar and increase the viewing size of the application.

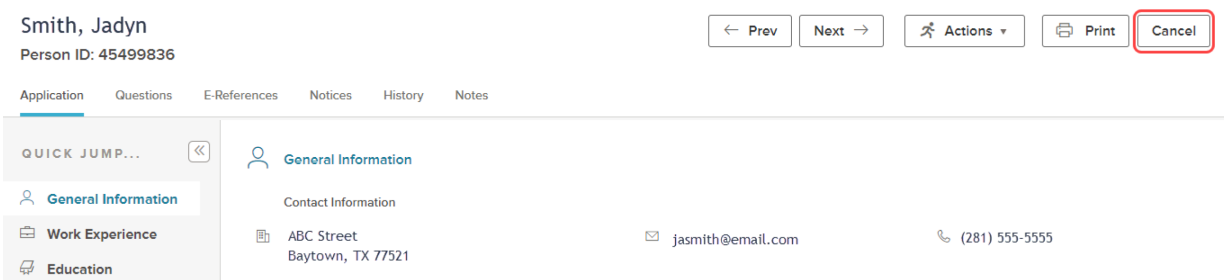


6. Click on the Questions tab to review the candidate's responses to the agency wide and supplemental questions. Select Prev to go back to the previous candidate's application or Next to proceed to the next candidate's application.

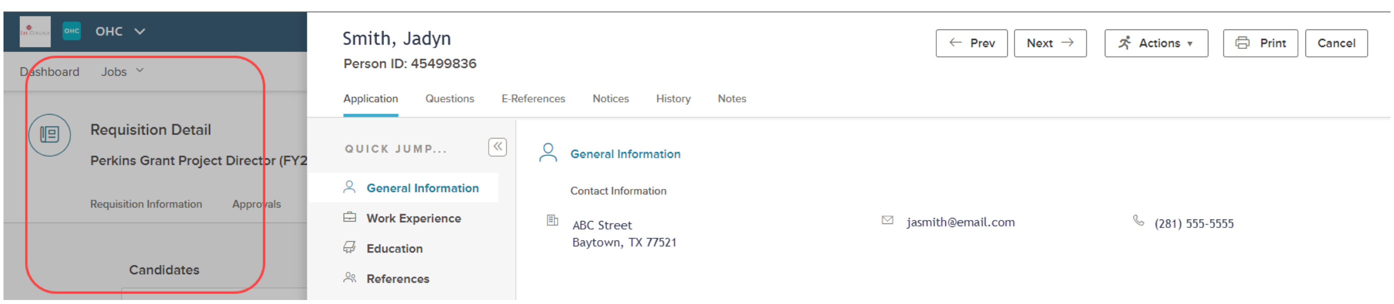



7. There are two ways to close the application preview screen and return to the Candidates tab on the Requisition Detail page:

   A.) From the application preview page, click Cancel or

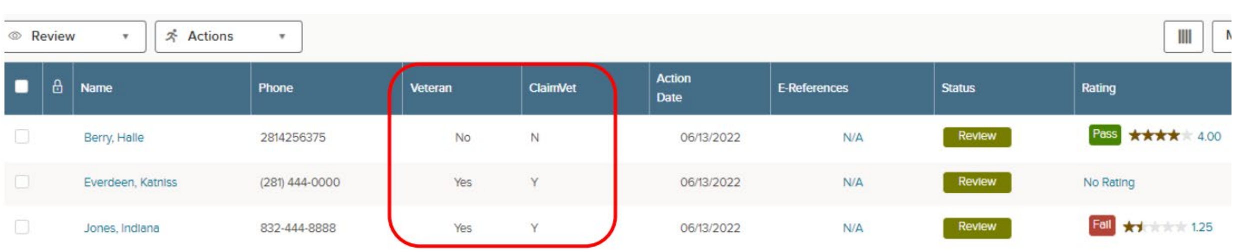



   B.) Click anywhere outside the application preview screen.




## Confirm Applicant's Veterans Preference

When reviewing candidate lists, as described above, an applicant's veteran status and veteran's preference can be quickly identified in the Veteran and Claim Vet column on each applicant list.




| Name | Phone | Veteran | ClaimVet | Action Date | E-References | Status | Rating |
|---|---|---|---|---|---|---|---|
| Berry, Halle | 2814256375 | No | N | 06/13/2022 | N/A | Review | Pass 4.00 |
| Everdeen, Katniss | (281) 444-0000 | Yes | Y | 06/13/2022 | N/A | Review | No Rating |
| Jones, Indiana | 832-444-8888 | Yes | Y | 06/13/2022 | N/A | Review | Fail 1.25 |

## Move Applicants Through the Hiring Workflow

The following steps/statuses are established to move applicants through the recruiting/hiring process:

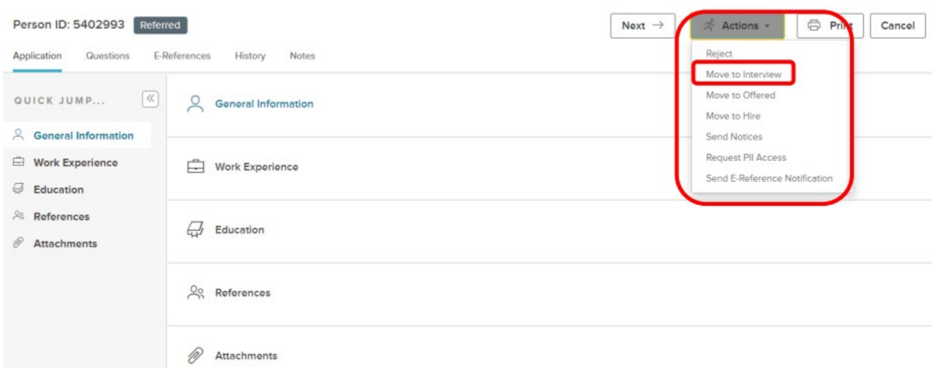
| Step # | Hiring Workflow Status | Task Owner | Description |
|---|---|---|---|
| 1. | Referred | Hiring Manager | All applications for a position initially populate in the Referred step. Only employees assigned to the Hiring Manager field on the requisition form can view the applications.<br><br>Actions Needed:<br>A.) If the Search Committee needs access to view applications, Hiring Manager will select all applicants, click Actions and Move to Review.<br>B.) If no one else is reviewing applications for this position, the Hiring Manager will select the applicants to forward to the interview step, click Actions and Move to Interview. |
| 2. | Review | Hiring Manager & Search Committee (If Applicable) | With proper permissions set up, Hiring Manager and Search Committee members can view and rate applications.<br><br>Actions Needed:<br>A.) Hiring Manager assigns access to Search Committee members allowing them to view applications (if needed).<br>• Manager has the option to set up rating criterion everyone can use to rate candidates/help decide who to extend an interview to.<br>B.) Hiring Manager and Search Committee members review applicants and determine who to interview.<br>C.) Hiring Manager will select candidates being referred for an interview, click Actions and Move to Interview. |
| 3. | Interview | Hiring Manager & Search Committee (If Applicable) | With proper permissions set up, Hiring Manager and Search Committee members can view and rate candidates who interviewed.<br><br>Actions Needed:<br>A.) Hiring Manager assigns access to Search Committee members allowing them to view and rate interviewees at this step (if needed).<br>B.) Hiring Manager contacts candidates to schedule interviews.<br>C.) Hiring Manager and Search Committee members interview candidates.<br>• Manager has the option to set up rating criterion everyone can use to rate candidates after the interviews.<br>D.) Hiring Manager or designated committee member will check references for top candidate(s). |
| 4. | Offered | Hiring Manager & HR | At this step, Hiring Manager recommends candidate for hire, obtains appropriate approvals from supervisors in the chain of command (if needed) and HR extends the offer.<br><br>Actions Needed:<br>A.) Hiring Manager will select candidate recommended for hire, click Actions and Move to Offer.<br>• On the Offer form, Hiring Manager enters the date of the recommendation and updates the Offer Approval Workflow to electronically get support for the recommendation from the appropriate supervisors. ** *The Cabinet/President's Office does* |

| | | | |
|---|---|---|---|
| | | | *not need to approve recommendations. If this option appears in the offer approval workflow, Hiring Manager need to delete it.* ** <br>B.) After appropriate approvals are obtained, HR completes the electronic Offer form and extends an employment offer to the candidate. |
| 5. | Hired | HR | Actions Needed:<br>A.) HR moves the candidate who accepts our employment offer into the Hired status.<br>• Candidates who decline our offer will be processed appropriately.<br>B.) HR closes the posting and marks the requisition as filled. |
| 6. | Rejected | HR | Actions Needed:<br>A.) HR sends email to candidates not selected for the position. |

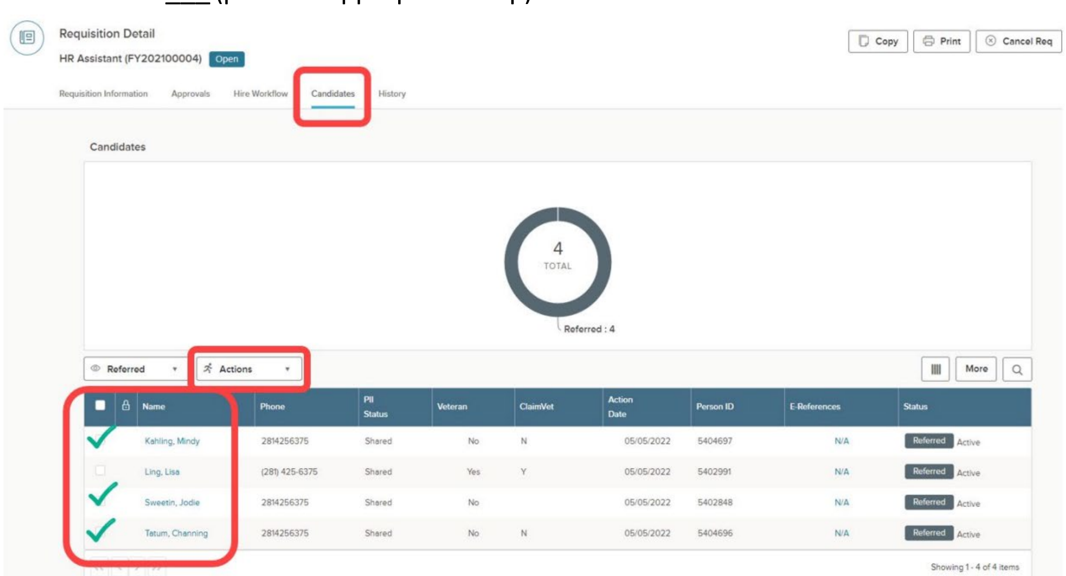
As noted in the chart above, Hiring Managers or Search Committee Chairs will move applicants through the following hiring workflow steps: Referred, Review, Interview and Offered.

There are two ways to move candidates through the various steps of the hiring workflow:

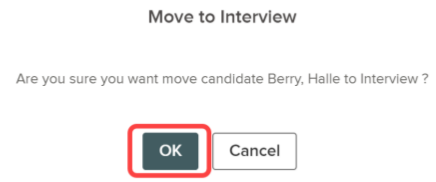
A.) Individually from the application screen - When viewing individual applications, select Actions and Move to __ (pick the appropriate step).



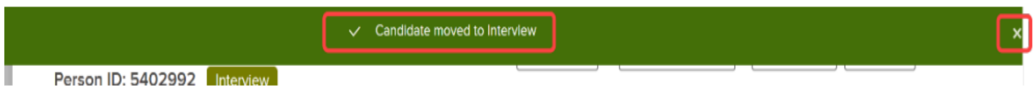

B.) From the Candidate List screen - Under the Candidate tab, click the boxes next to the candidates you want to move. You can select an individual or check multiple names to update the status of applicants in bulk. Click Actions and Move to ___ (pick the appropriate step).



The system will ask if you are sure you want to move candidates. Click OK.



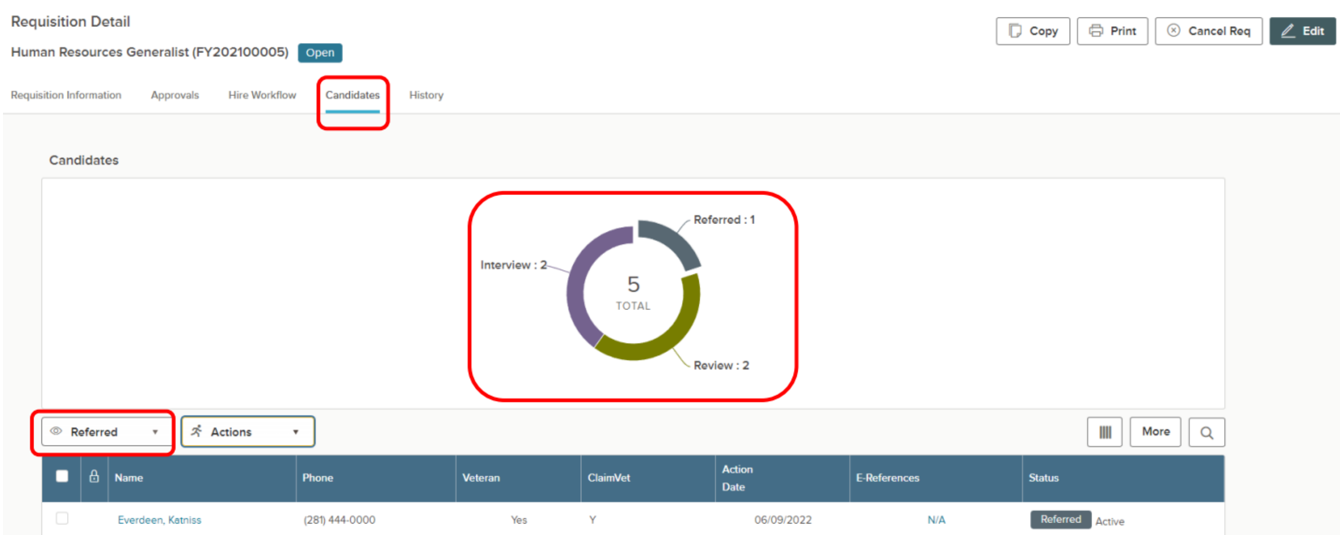

A green bar will appear at the top of the screen stating you successfully moved the candidate(s). Hit X to close this announcement.




You can view an updated list of candidates assigned to the different steps of the hiring workflow, in two ways:

1. Select the Referred drop-down link and change it to the appropriate list you want to view (e.g., Referred, Review, Interview, Offered or Hired) or

2. Click the appropriate section of the donut chart to open the list of candidates assigned to this area.




# Optional Interview-Related Functions

## Log Candidate Interview Dates

At this time, Committee Chairs/Hiring Managers will continue to schedule interviews with candidates as they have in the past. They communicate with the Search Committee to determine their availability to conduct interviews. Once a date and time is agreed upon, the Chair or Hiring Manager will contact the candidate directly (via phone and/or email) to schedule an interview.

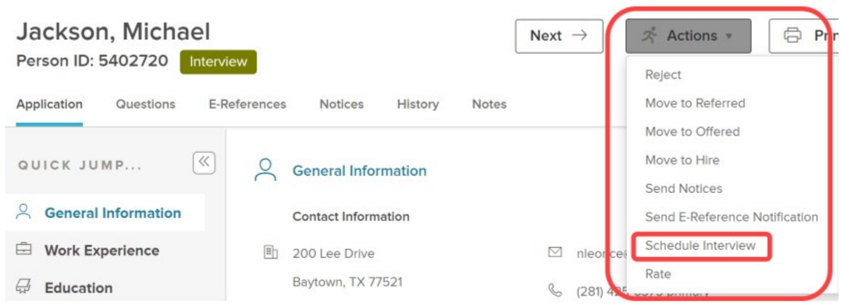
You have the option to log the interview meeting date and time in the OHC. This allows you to send email reminders to everyone about the interview(s). Follow the steps below to log a candidate's interview details.

1. When the candidate confirms his or her attendance, you have the option to return to your list of Interview candidates in the OHC to record the meeting date and time.

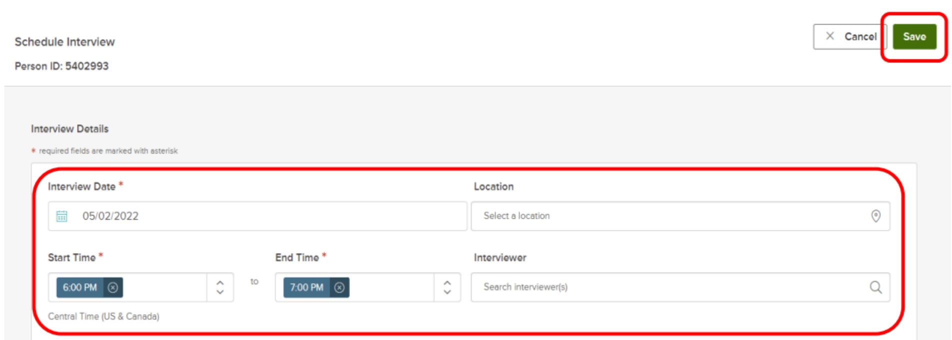
There are two ways to do this:

A.) From the Interview List, click Unscheduled for the appropriate candidate or


B.) From an individual's application, select Actions and Schedule Interview.




2. On the Interview Details page, enter the date, time, location, and names of the Search Committee members in the Interviewer field. Adding the names of the committee members is optional. This allows members of the group to receive a copy of the email you send to the candidate(s). Click Save when you are finished.



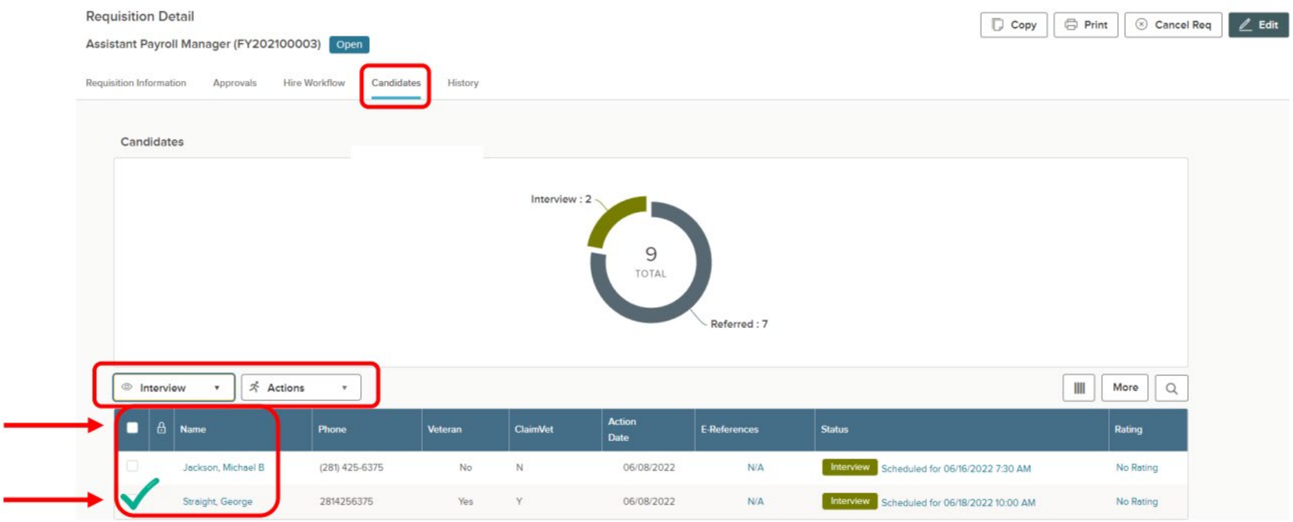

## Send Email to Remind Candidates of Their Interviews

Because you logged the interview details, you can send an email reminding each candidate (and Search Committee members) of the date and time of their scheduled interview.

1. Return to the Interview List. From the Dashboard, select the Recruiting link > My Requisitions tab > click the appropriate requisition/position > click the Candidates tab. Find the candidate(s) you want to view. They should be listed under the Interview hiring status.

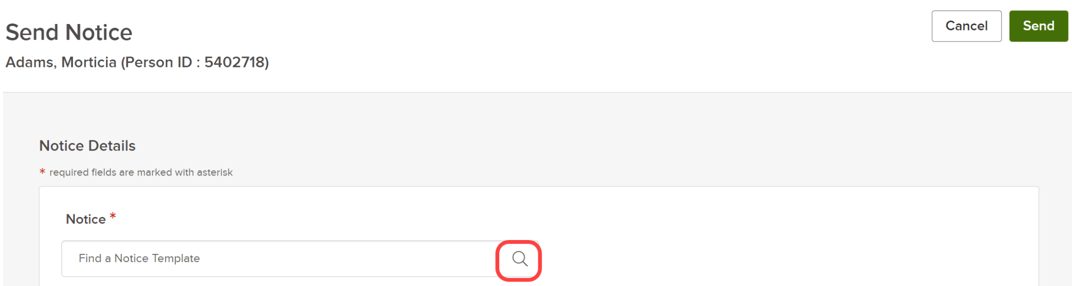
   There are two ways to select candidates to send a reminder:

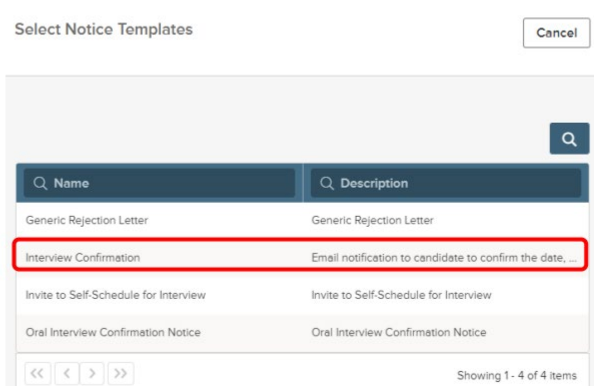
   A.) Individually – Check the box next to the candidate(s) you want to send a notification or
   B.) In bulk – Check the box to send a notification to all candidates.



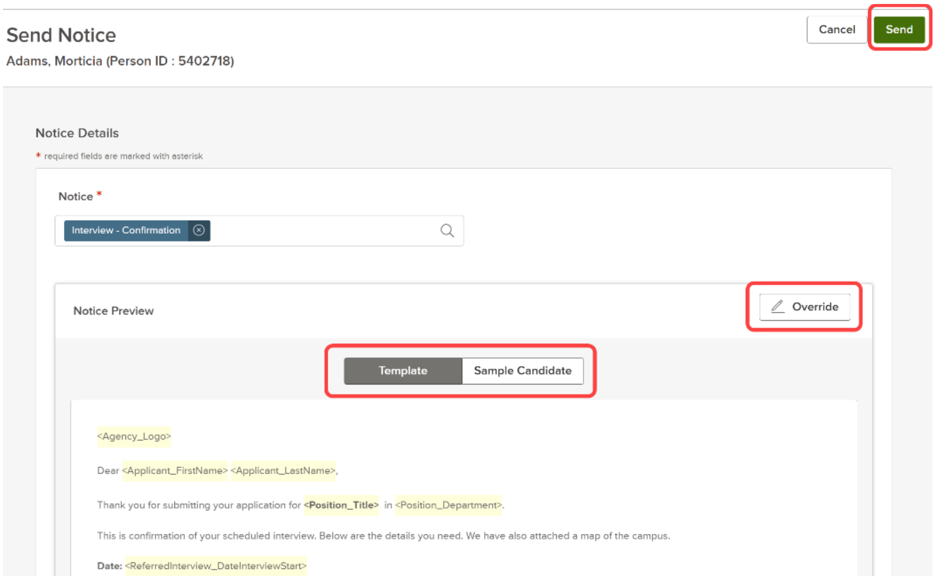

2. Select the candidate you want to send a reminder to. Then click Actions and Send Notices.

3. Click the magnifying glass to search notification templates. Select the Interview Confirmation template.




4. A preview of the notice will appear. To edit this message prior to sending, click Override. (Changes made here will not affect the original template.) To preview your message, click Sample Candidate. When you are ready to send the message, click Send.



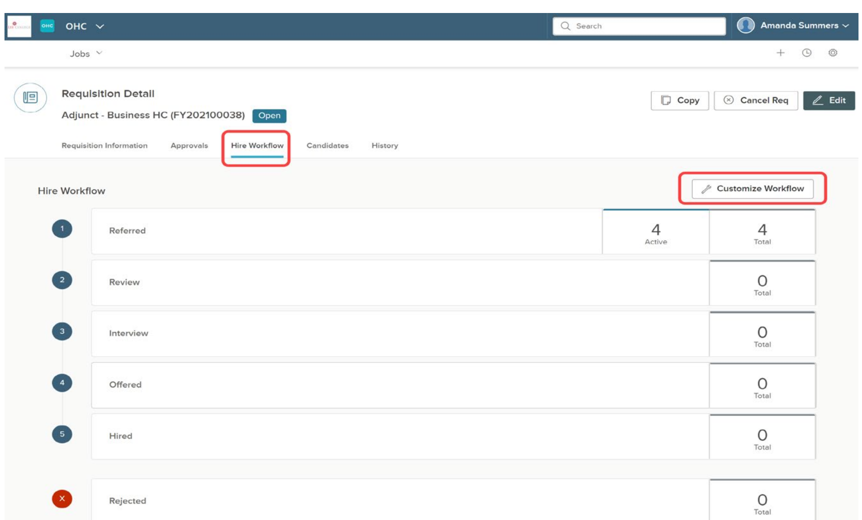

## Set Up Interview Ratings

Before scheduling interviews, the Search Committee should have determined the interview questions to ask the candidates. The interview questions were devised to see if candidates possess the desired knowledge, skills, abilities and experience to successfully perform the job. The questions can be condensed into categories, and those categories can be used as the interview rating scale criteria.

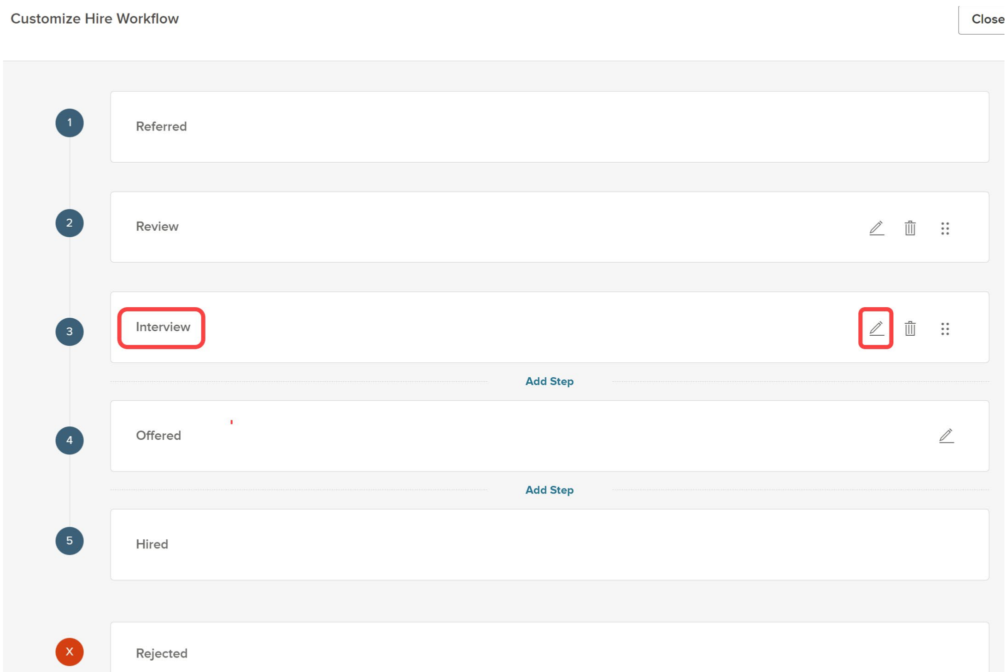
You have the option to set up a rating system for interviews. The interview rating is based on a 5-star rating scale, with 5 being the best.

To set up the interview criteria:

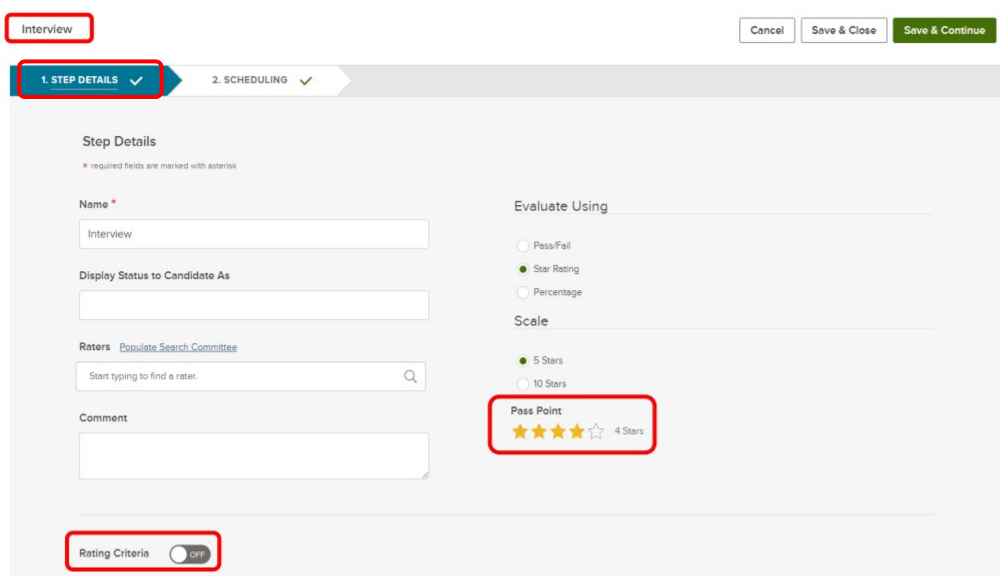
1. From the Dashboard, select the Recruiting link > My Requisitions tab > click the appropriate requisition/position > Hire Workflow tab > Customize Workflow.



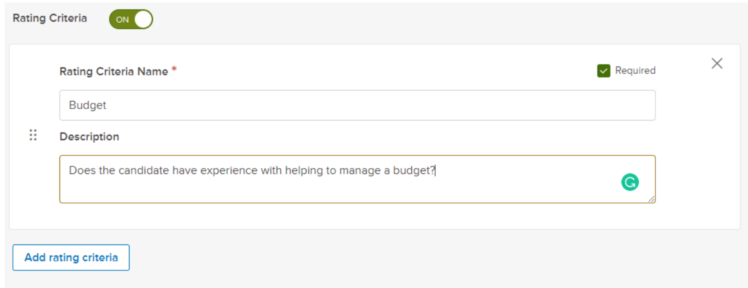
2. In the Interview step, click the pencil to edit the rating scale.




3. On the Step Details tab, enter the Pass Point minimum and turn the Rating Criteria on. Pass Point refers to the minimum number of stars the interviewing candidate must receive to move to the second round of interviews or to be recommended for hire (e.g., 4 out of 5 stars).

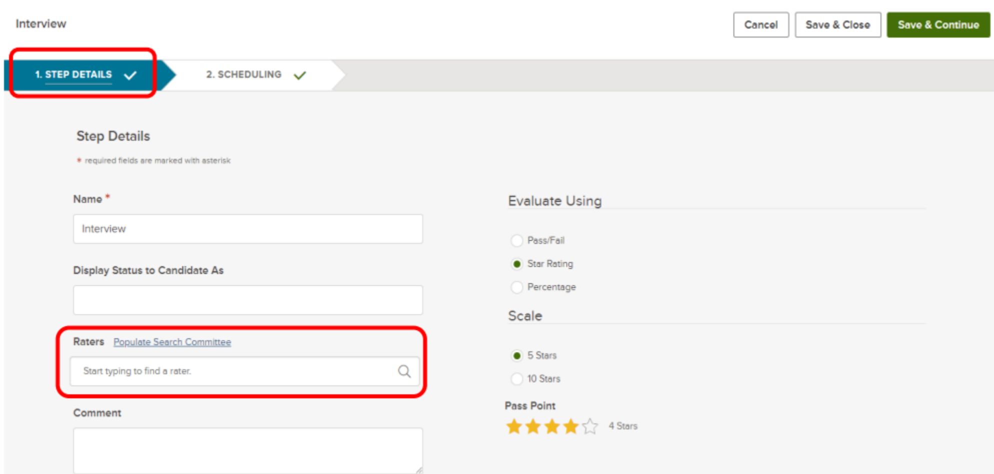



4. When the Rating Criteria is on, enter a Rating Criteria Name (e.g., a specific skill or qualification that you are looking for) and Description. For instance, a rating criterion could be “Supervision” and the description, “Does the candidate have experience supervising others?” Check the Required box to require a response to this criterion. Select Add Rating Criteria to add more.

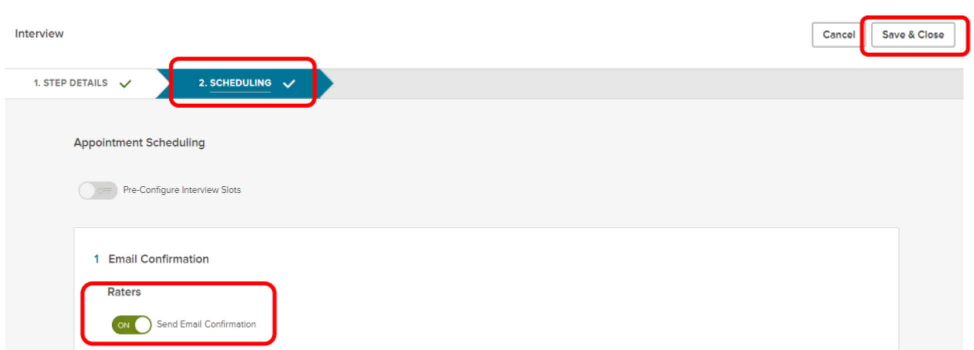



5. To enable Search Committee members to also submit ratings for the candidates, add them as raters in the Raters section. Click the Populate Search Committee link or search for members by clicking the magnifying glass or typing the names in. Contact the Human Resources Office at hr@lee.edu or (281) 425-6875 if you cannot find a member's name. Select Save and Continue.

   *TIP: Clicking Populate Search Committee will NOT automatically fill in the members unless their names were listed on the requisition for this position. Committee members are typically determined AFTER a position has been approved to be filled. HR enters committee members on the Requisition form when we receive approval of the members.*




6. On the Scheduling tab, ensure the Rater button is turned on. This will send a notification to the Raters letting them know they have a task to complete. Click Save & Close.



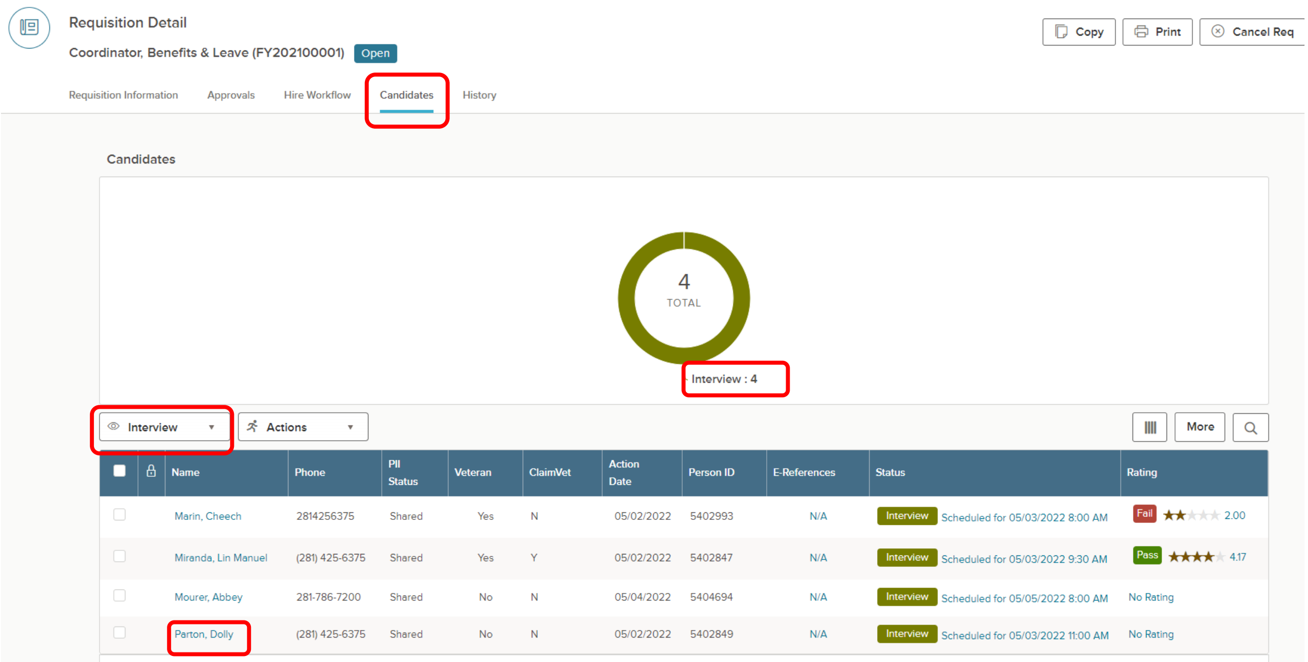

*TIP: Hiring managers can follow this same process in the Review step in the hiring workflow to create rating criterion for members to consider when they initially review applications.*

## Rate a Candidate After the Interview

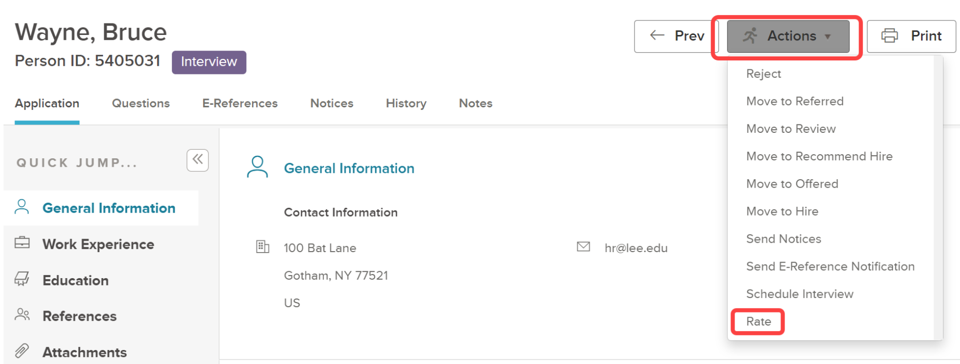
To rate a candidate after the interview, return to the Interview List.

1. From your Dashboard, Dashboard link > My Candidates section, select the appropriate Requisition/Job Title.

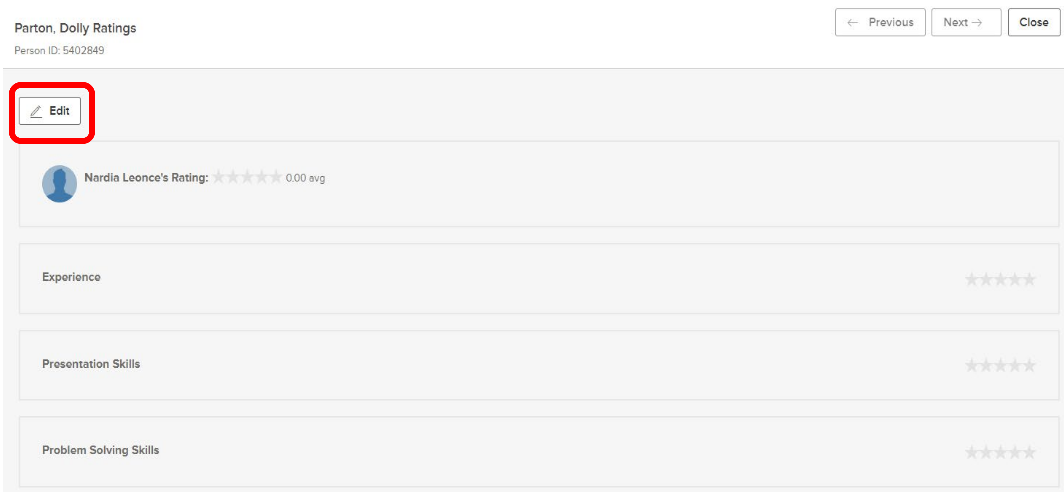
2. The Requisition Detail screen opens. Click the Candidate tab. Locate candidates in the Interview List by selecting the Interview List option or clicking the Interview section of the donut chart. Then select the name of the candidate you want to rate.



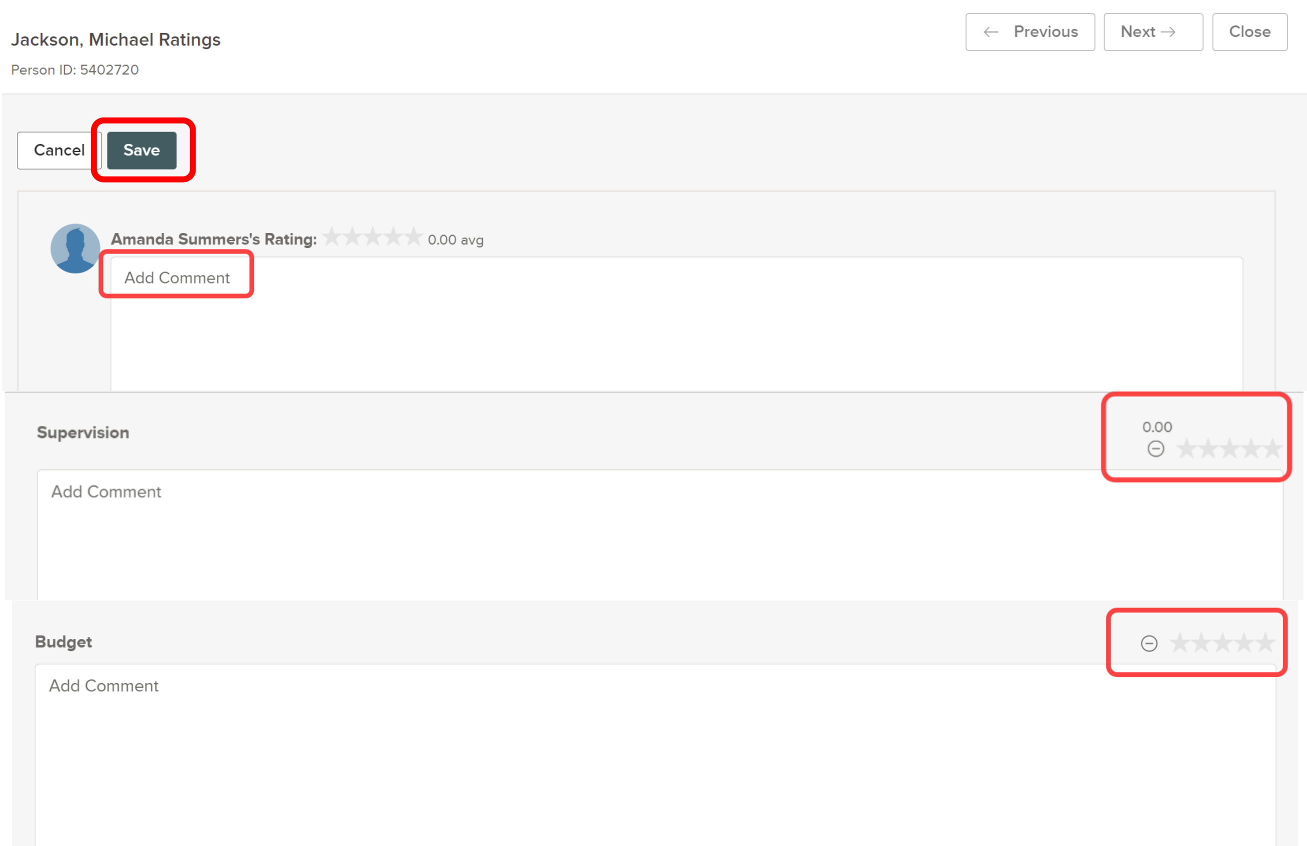

3. This opens the candidate's application. Select Actions and choose Rate.



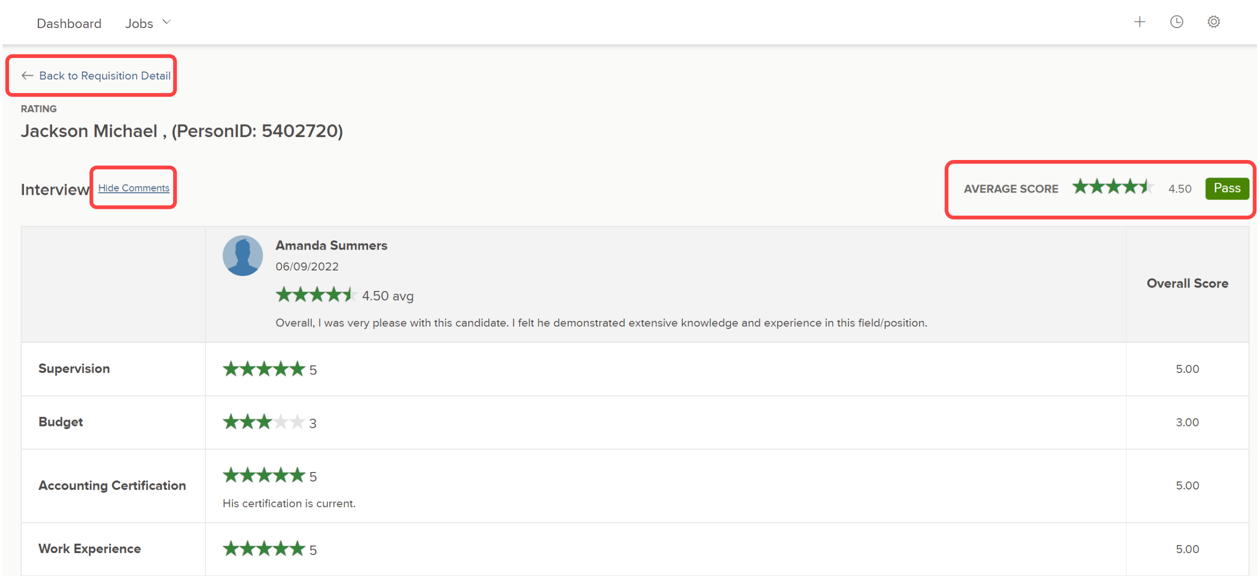
4. Click Edit to enter your rating for each criterion.



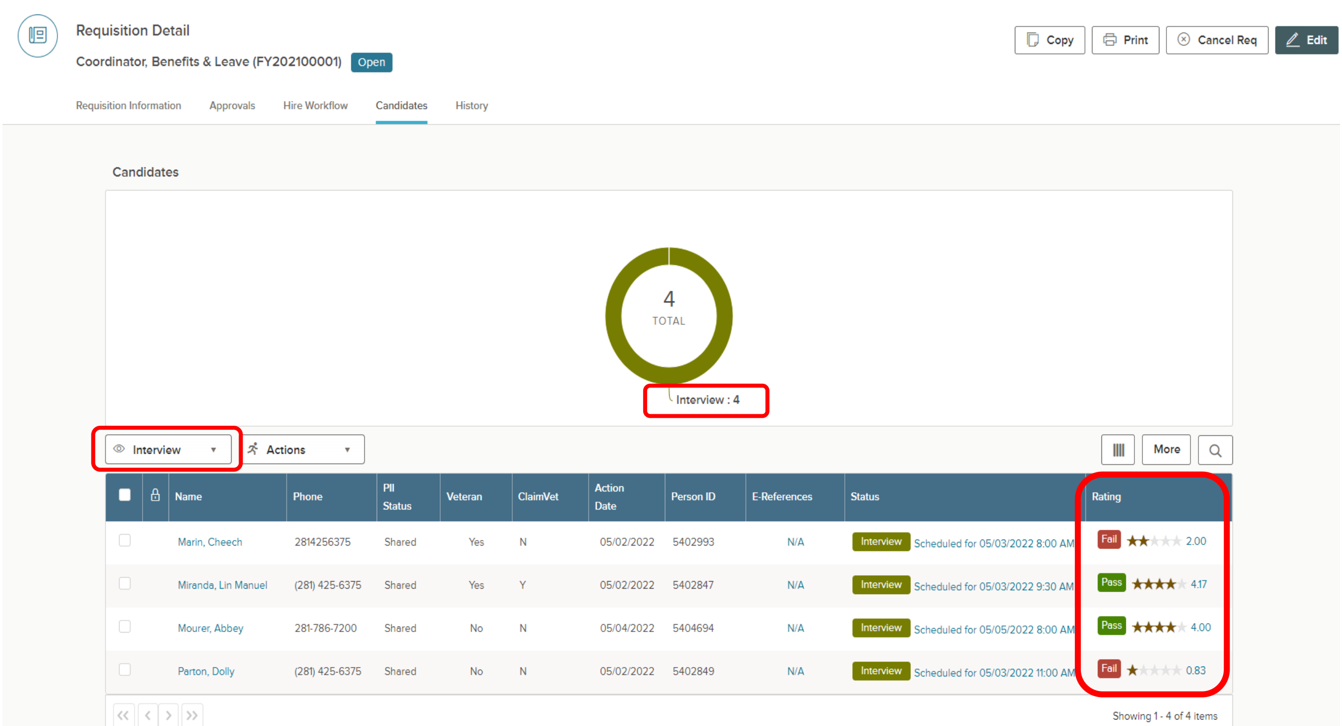

5. Enter your comments and star ratings. Click Save.



6. A summary of your ratings will appear. If you do not want to display the comments, select Hide Comments. Click Back to Requisition Detail to return to the Interview List.




7. On the Interview List, the overall ratings will now populate in the Rating column for each candidate that was rated.



# Electronic Reference Checks

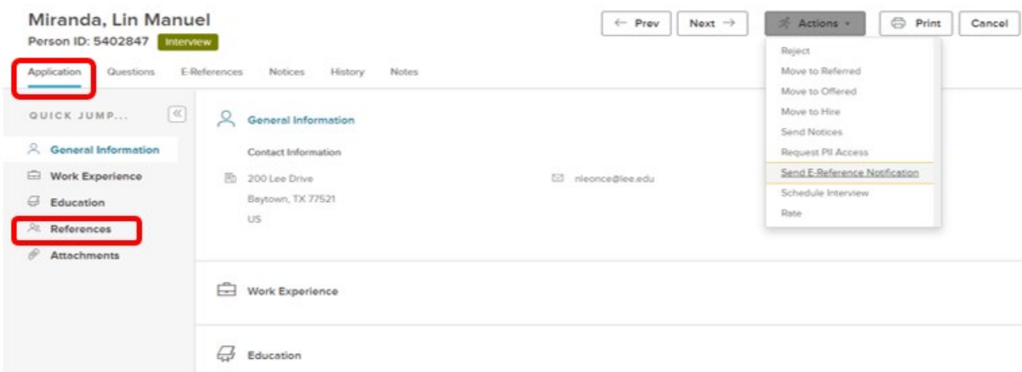
Once the search committee has decided which candidate they would like to recommend for hire, then the hiring manager will need to check references. Reference requests can be sent electronically through the system to the references that the candidate included on their application. If the candidate did not include references on his/her application, you could manually add them on the E-References tab.

## Initiate an E-Reference

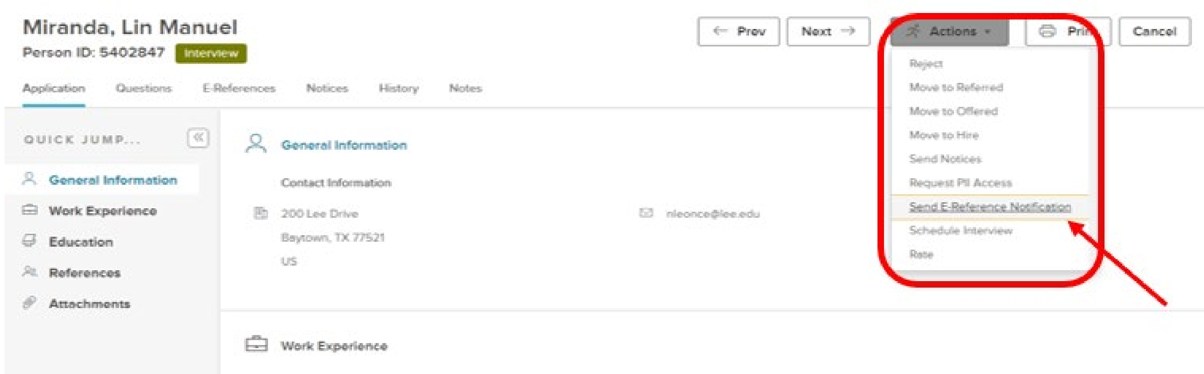
**Candidate Entered References on the Application**

If the candidate entered references on his/her application, they will appear in the References section of the Application.

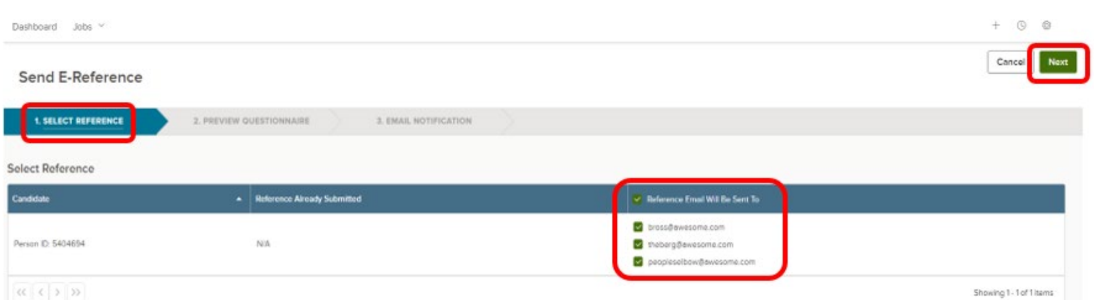
1. Open the candidate's application. Click the References section to view the reference information.



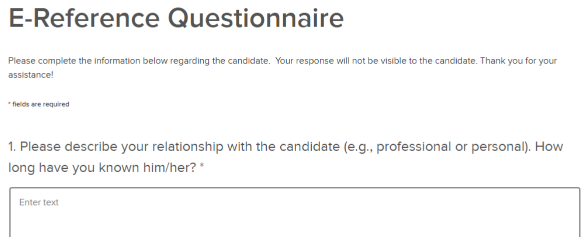

2. To send an electronic reference request for a candidate, click Actions and Send E-Reference Notification.



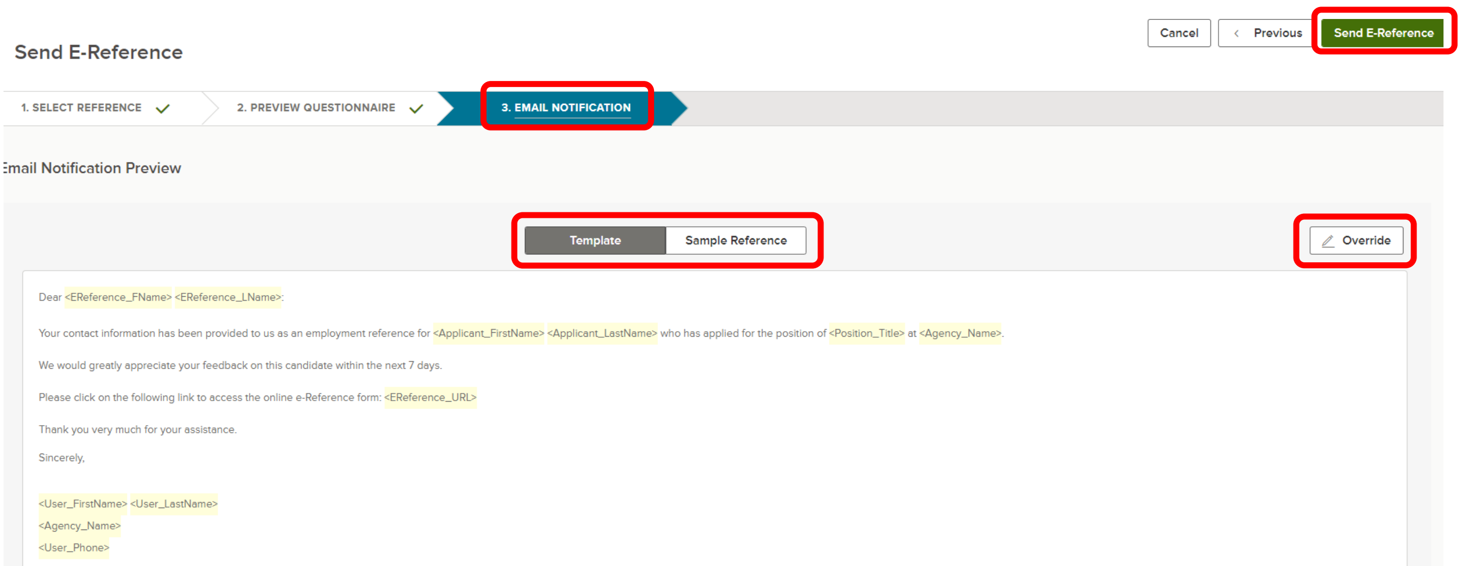

3. On the Select Reference tab, check the email addresses of the references you want to send notifications to and click Next.



4. On the Preview Questionnaire tab, you can preview the questions that will be sent to the reference.



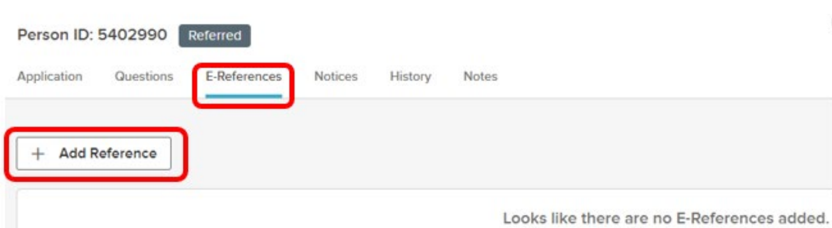

5. On the Email Notification tab, review and edit the notification you will send. Click Override to edit the text, if necessary, and select Sample Reference to preview the message with the candidate's information. When finished, click Send E-Reference.



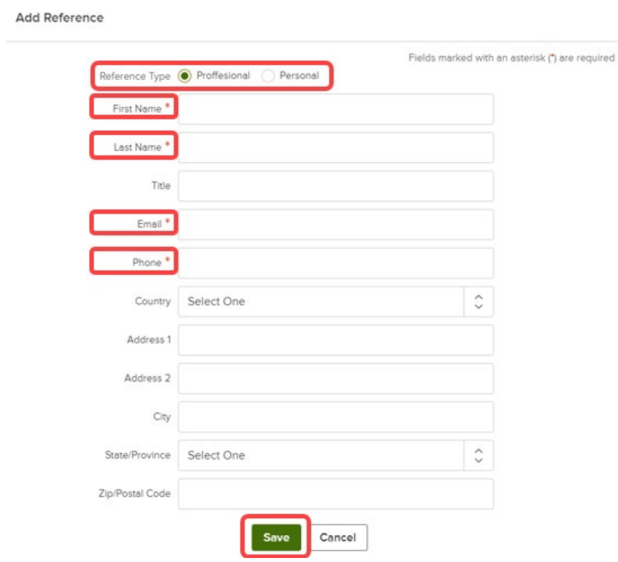

**Candidate Did <u>Not</u> Enter References on the Application**

If the candidate did not enter references on his/her application, you can manually add them under the E-References tab on the candidate's application.

1. Open the candidate's application. Select the E-Reference tab, then + Add Reference.



2. Enter the applicable information on the Add Reference screen. Click Save when you are finished. Repeat these steps to add multiple references or new references in addition to those already provided on the application.



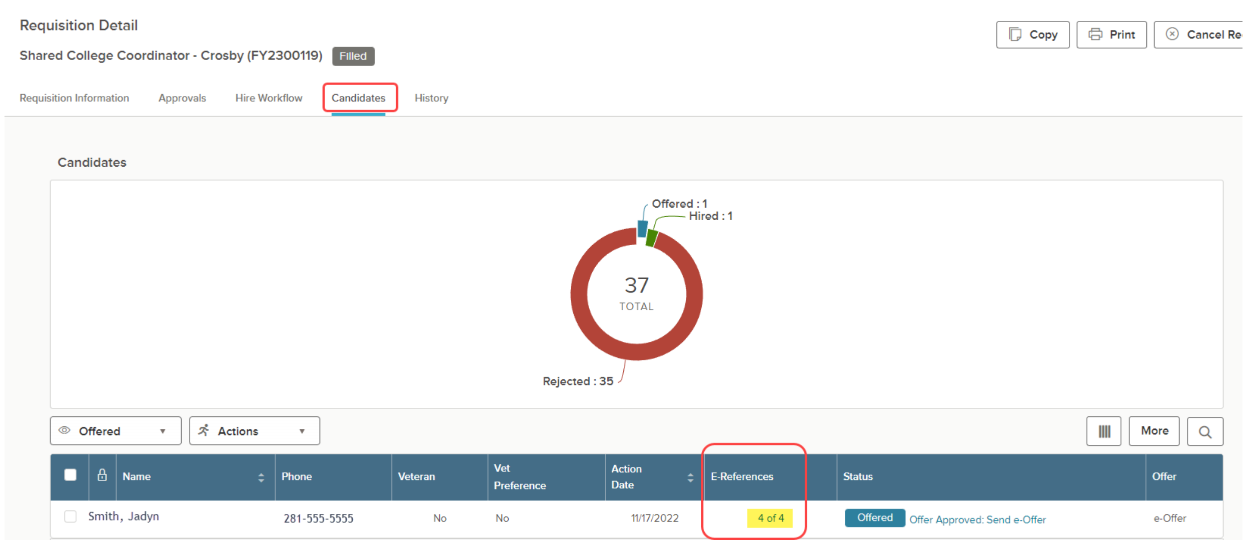

3. Once all the references have been added, follow the steps outlined in the Candidate Entered References on the Application section above to initiate the electronic references and review/customize the email notification.

## Review Reference Responses

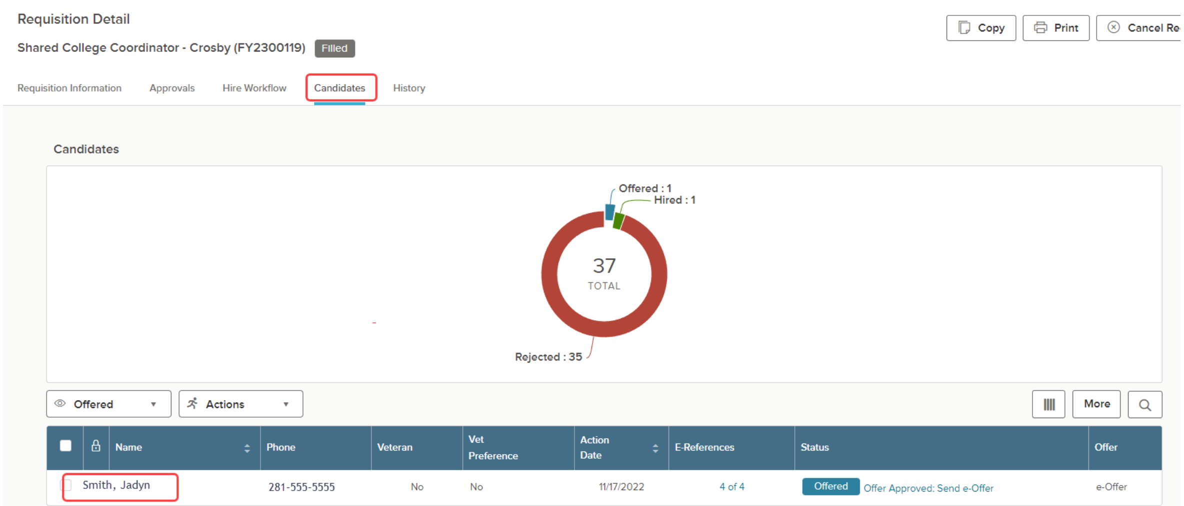
Reference responses can be viewed in the candidate's application.

1. From the Dashboard, click the Recruiting link > My Requisitions tab > select the appropriate requisition/position > Candidates tab. Find the candidate you want to review.

    A.) From the E-References column, click the shortcut/link to open the E-References screen on the application flyout or

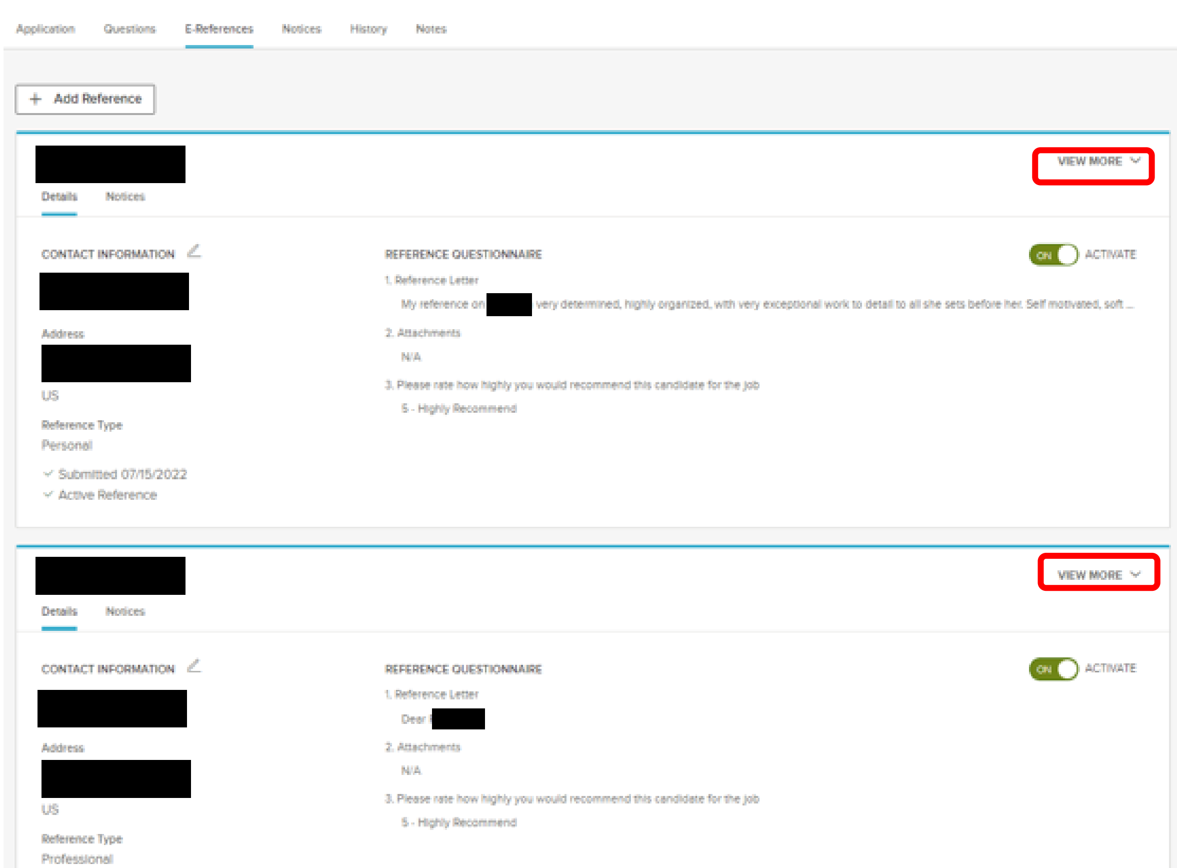


B.) Click the appropriate candidate's name to open his/her application. Click the E-References tab.





2. Review the responses received from each reference. Click View More to see additional information.



# Search Committees

## Identifying Search Committee Members

Hiring managers and Committee Chairs will continue to email their list of recommended committee members to the appropriate supervisors in the chain of command. Once the members of the committee are approved and completed the required online training, HR will enter their names in the OHC's electronic requisition form.

## Providing Committee Members Access to Applicants

To allow Search Committee members to view and/or rate applications for a position, managers must move all candidates from Referred to Review status and assign the members access in the Review and Interview hiring steps (see Set Up Interview Rating section). If a member of your committee is not able to view the applications, please contact Human Resources at hr@lee.edu or (281) 425-6875.

# Questions/Assistance

If you have questions or need assistance, contact the Human Resources Office at hr@lee.edu or (281) 425-6875.