

Interview Self-Scheduling Guidance

Interview Self-Scheduling Guidance

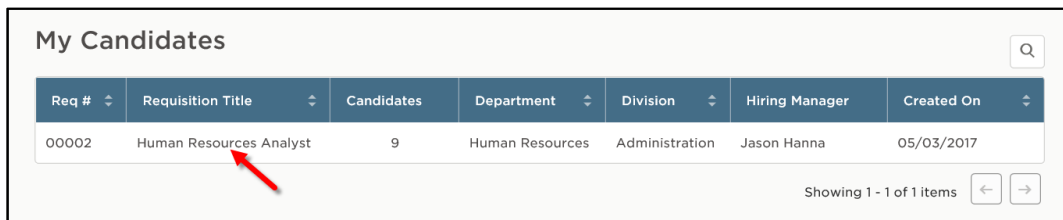
If you are planning to utilize self-scheduling for interviewing, it is important to include the verbiage below on the external vacancy posting at the bottom of the Required Experience, Training & Eligibility section:

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

Interview Self-Scheduling Instructions – One Candidate/Timeslot

After logging in to NEOGOV, access the OHC environment.

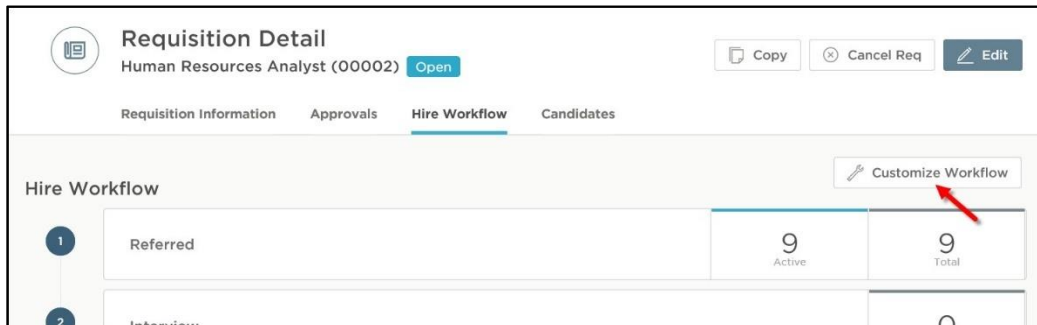
From the My Candidates section of your dashboard, click on the requisition title for which you need to create a custom hire workflow to allow for self-scheduling.




The screenshot shows the 'My Candidates' dashboard. It features a search bar in the top right corner. Below it is a table with the following columns: Req #, Requisition Title, Candidates, Department, Division, Hiring Manager, and Created On. The table contains one row with the following data: Req # 00002, Requisition Title Human Resources Analyst, Candidates 9, Department Human Resources, Division Administration, Hiring Manager Jason Hanna, and Created On 05/03/2017. A red arrow points to the 'Human Resources Analyst' text in the Requisition Title column. At the bottom right of the table, it says 'Showing 1 - 1 of 1 items' with left and right navigation arrows.

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

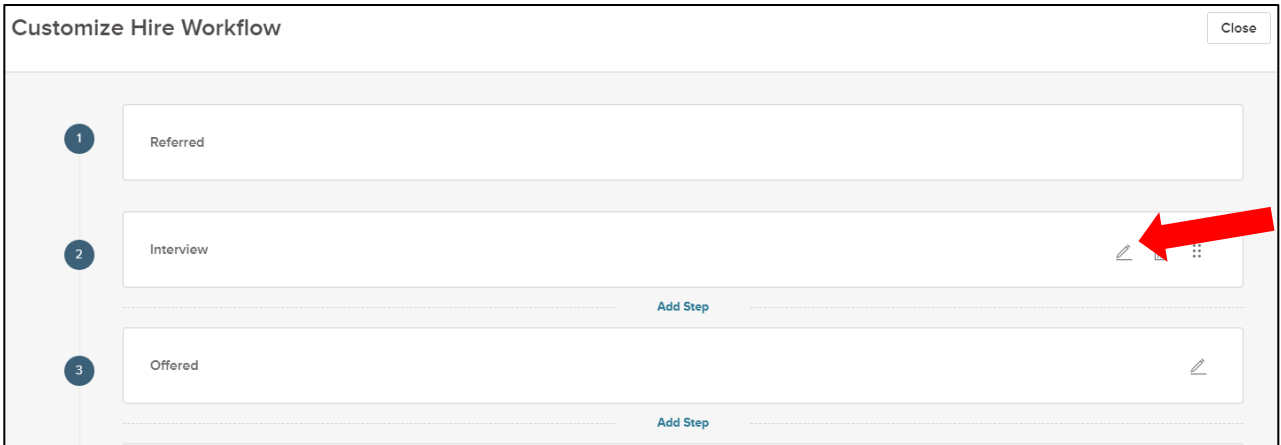
Click on the Hire Workflow tab and then click on the Customize Workflow button.



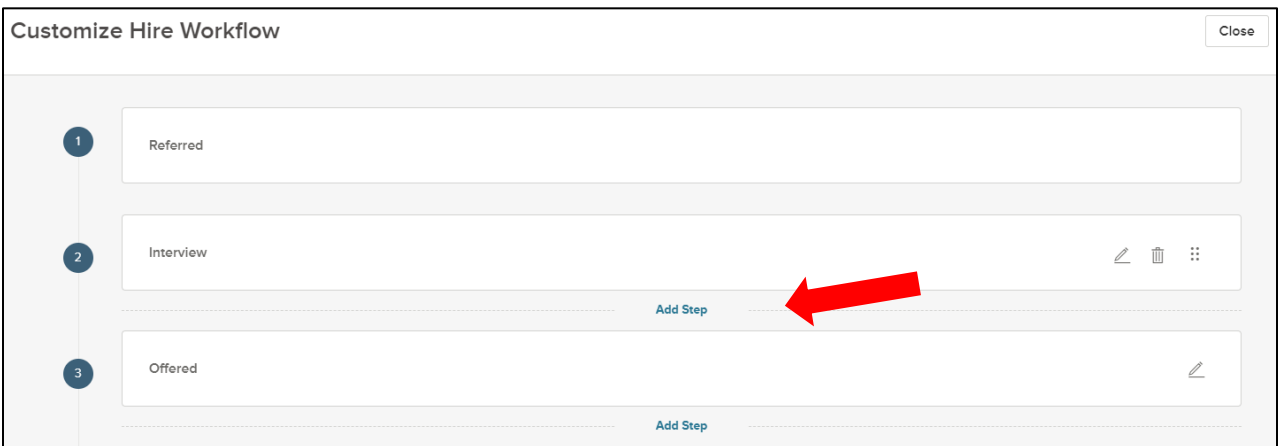
The screenshot shows the 'Requisition Detail' page for 'Human Resources Analyst (00002)'. At the top, there are buttons for 'Copy', 'Cancel Req', and 'Edit'. Below these are tabs for 'Requisition Information', 'Approvals', 'Hire Workflow', and 'Candidates'. The 'Hire Workflow' tab is selected. In the 'Hire Workflow' section, there is a 'Customize Workflow' button with a wrench icon, which is highlighted by a red arrow. Below the button, there is a workflow diagram with two steps: '1 Referred' and '2 Interview'. The 'Referred' step has a box with '9 Active' and '9 Total' candidates, with a red arrow pointing to the '9 Total' value.

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

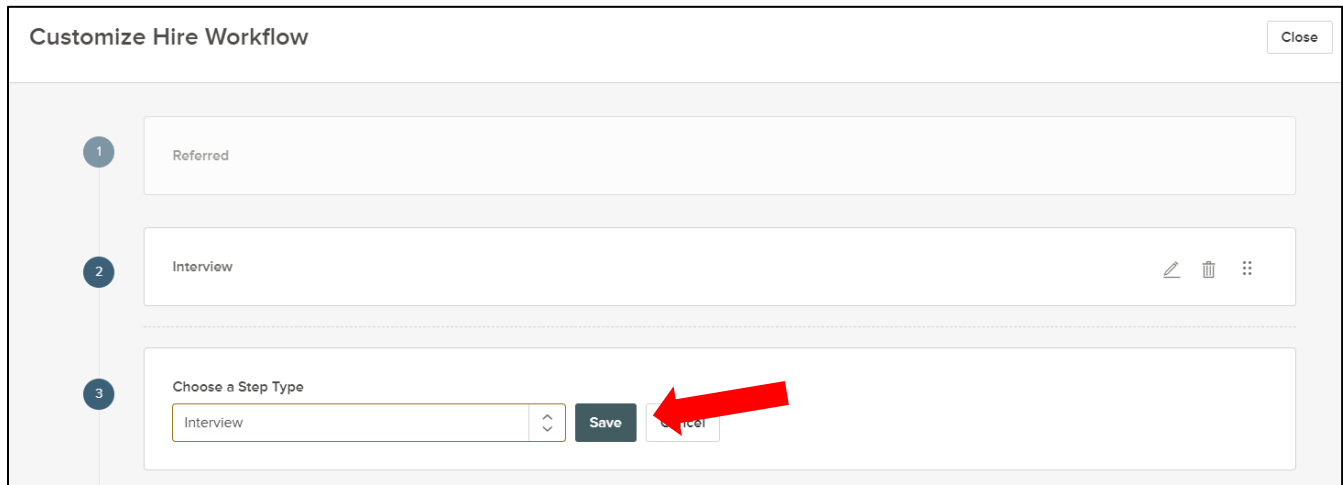
- If you are using self-scheduling for only one round of interviews (either just phone, or just in-person, or just virtual), click on the pencil icon to change the name of the interview step to reflect the type of interviews you are conducting (i.e. phone, in-person, or virtual).



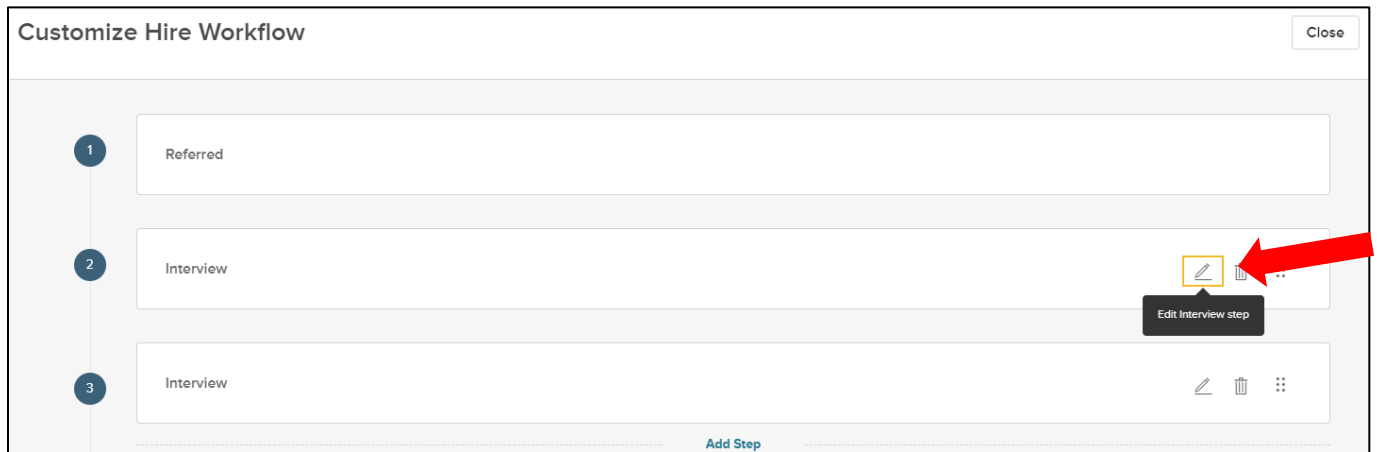
- If you are using self-scheduling to conduct more than one round of interviews (i.e. phone and in-person), you will need to add a workflow step by clicking Add Step below the existing Interview step.



Click Save.



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



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

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

Click Save & Continue.

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

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

The screenshot shows the 'Interview' screen with two tabs: '1. STEP DETAILS' (active) and '2. SCHEDULING'. The 'Step Details' section includes a 'Name' field with the text 'Phone Interview', a 'Display Status to Candidate As' field, and a 'Raters' field with 'Rummel, Jordan'. A red arrow points to the 'Save & Continue' button in the top right corner. The 'Evaluate Using' section has radio buttons for 'Pass/Fail', 'Star Rating' (selected), and 'Percentage'. The 'Scale' section has radio buttons for '5 Stars' (selected) and '10 Stars'. The 'Pass Point' section shows a star rating of 3 Stars.

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

Interview

1. STEP DETAILS ✕ **2. SCHEDULING** ✓

Appointment Scheduling

Pre-Configure Interview Slots

1 Email Confirmation

Raters

Send Email Confirmation ←

Subject
Interview Notification - Interview Scheduled

Body
Dear [Rater], You have been scheduled to interview <Candidate Name> on <Date><Time> at <Location>

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

Interview Cancel Save & Close

1. STEP DETAILS ✓ **2. SCHEDULING** ✕

Appointment Scheduling

Pre-Configure Interview Slots ←

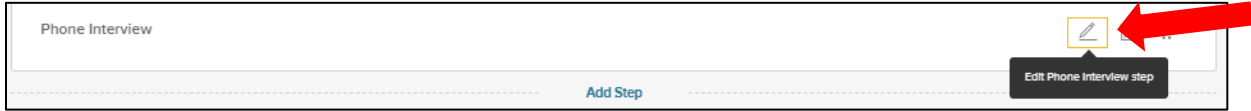
Allow Candidate Self-Scheduling

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

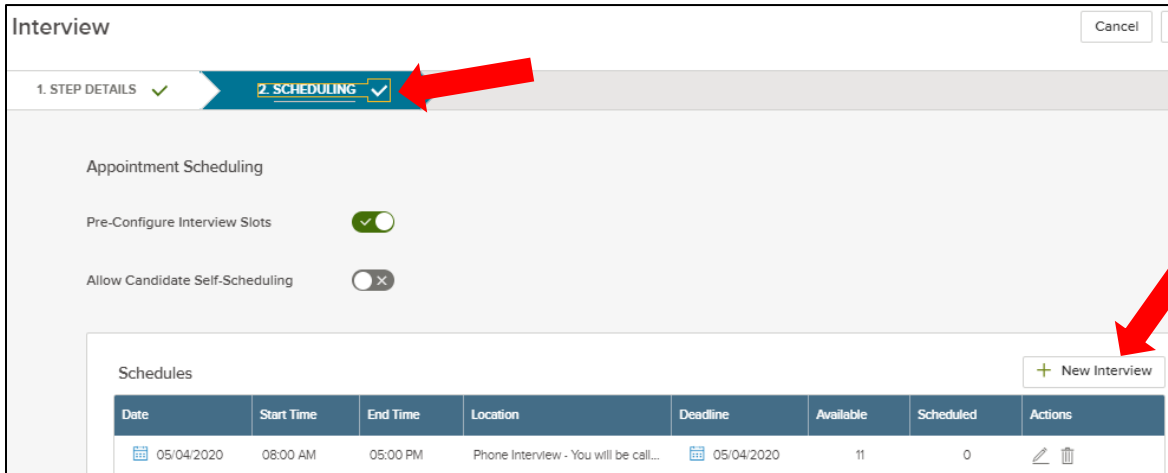
Select all the dates you want to offer for interviews. After all the dates are selected, choose the interview times, add durations, and time between interviews.

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

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

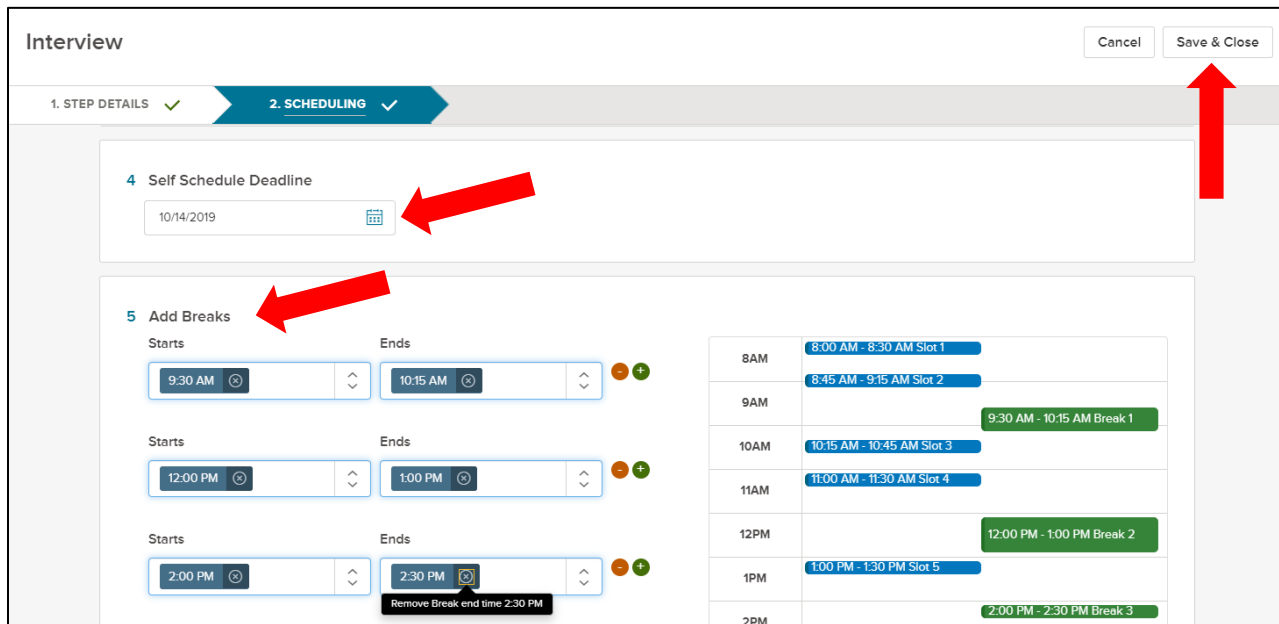


From the Interview screen, click on the Scheduling tab and then click on the New Interview button. Choose the location, your next interview date and times, add durations and breaks between interviews, and select Save & Close.



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

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

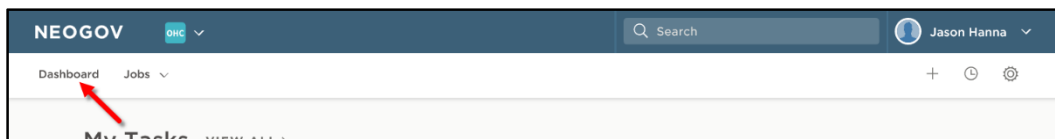


Schedule Interviews

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

Steps to Schedule Interviews

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



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

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

Showing 1 - 2 of 2 items

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

9 TOTAL
Referred: 9

6 records are selected

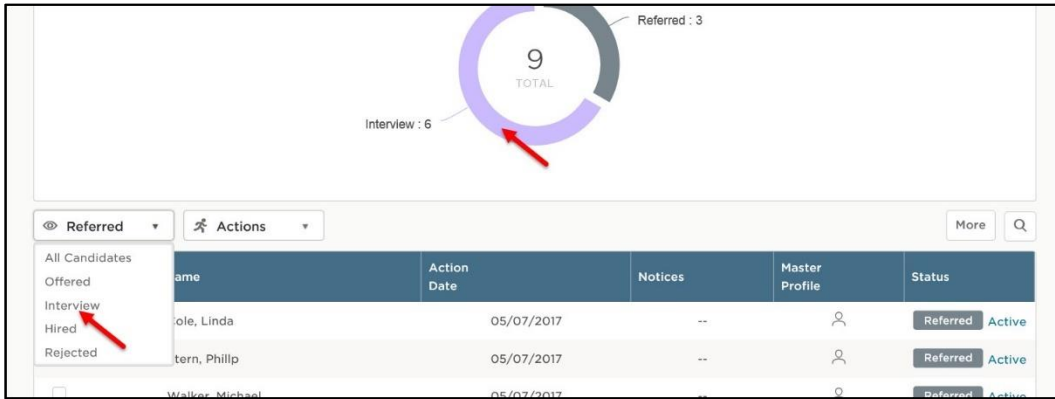
Actions

- Reject
- Move to Interview
- Move to Offered
- Move to Hire
- Send Notices
- Print Apps

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

Click OK to confirm moving the candidates.


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

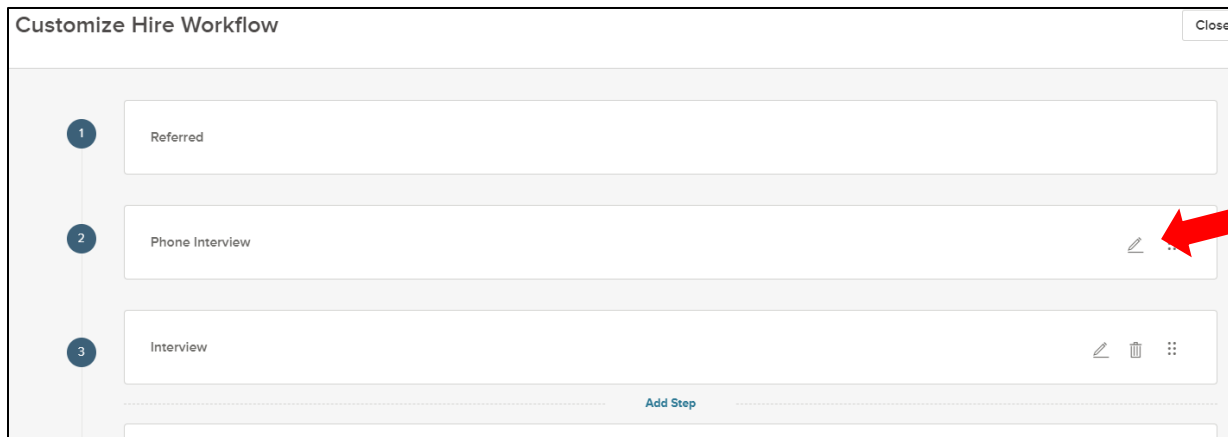


Now you are ready to allow candidates to see interview dates/times and schedule their interview!




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



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

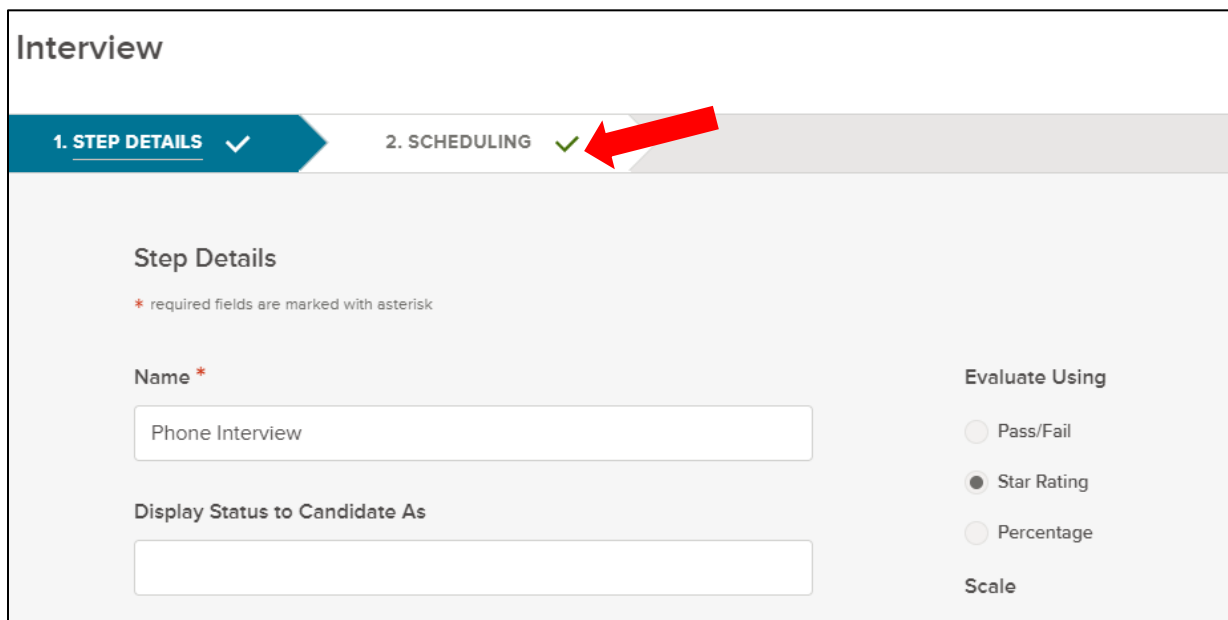


Customize Hire Workflow Close

- 1 Referred
- 2 Phone Interview 
- 3 Interview   

[Add Step](#)

Click on the Scheduling tab.



Interview

1. STEP DETAILS ✓ 2. SCHEDULING ✓

Step Details

* required fields are marked with asterisk

Name *

Display Status to Candidate As

Evaluate Using

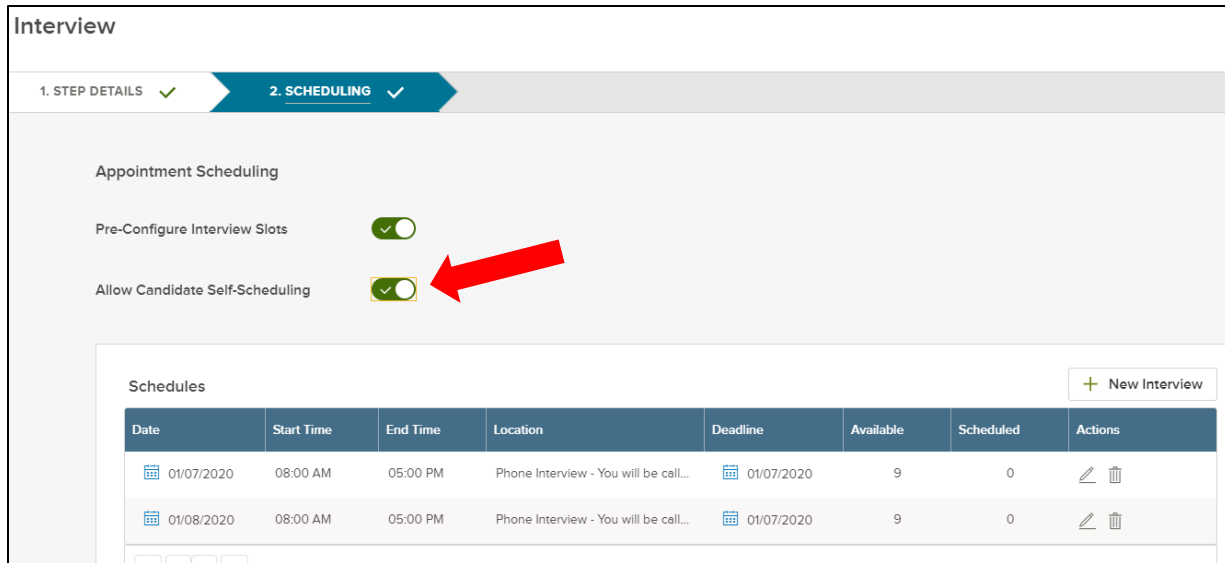
Pass/Fail

Star Rating

Percentage

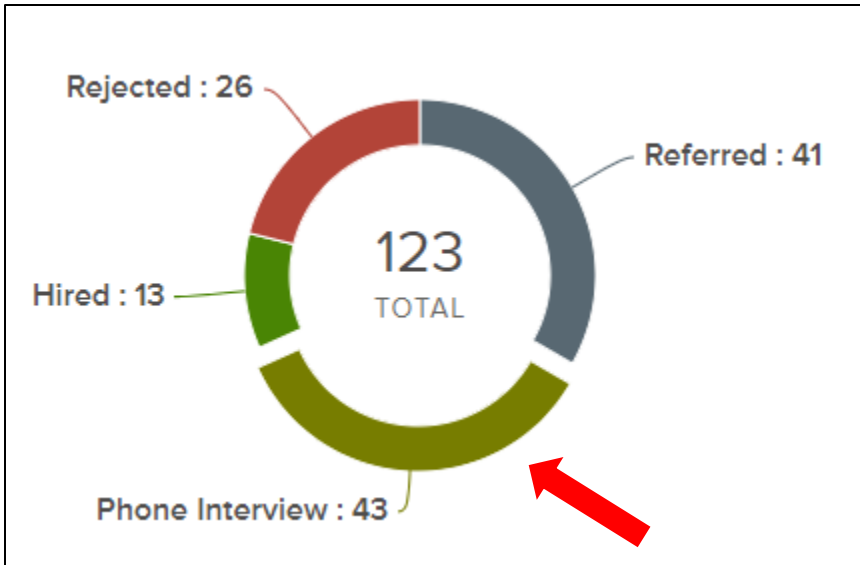
Scale

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



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

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



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

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

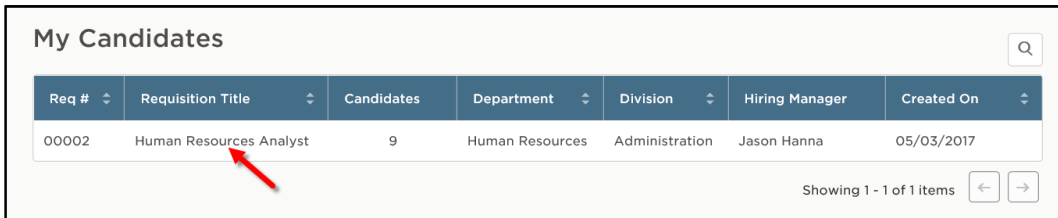
Name	Unsubscribed	Phone	Action Date	Vet Indicator	Date Vet Ind Assigned	County of Residence	Exam Score	Total Score	CS List Type 1	CS List Type 2	CS List Type 3	Personnel Number
Stamm, Daniel A.	No	570-847-3162	10/28/2019	V	6/26/2019	49	100	110				
Afolabi, Olufunmilayo	No	717-982-7433	10/28/2019			22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

Interview Self-Scheduling Instructions – Multiple Candidates/Timeslot

(For use in conducting group interviews and/or information sessions.)

After logging in to NEOGOV, access the OHC environment.

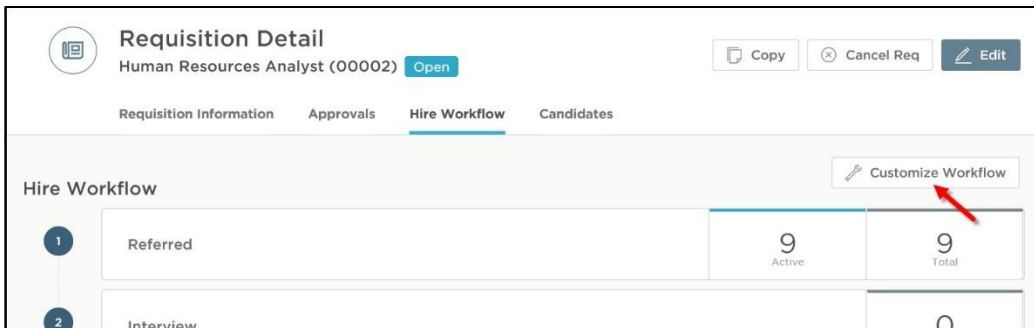
From the My Candidates section of your dashboard, click on the requisition title for which you need to create a custom hire workflow to allow for self-scheduling.



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

Showing 1 - 1 of 1 items

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



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

Copy Cancel Req Edit

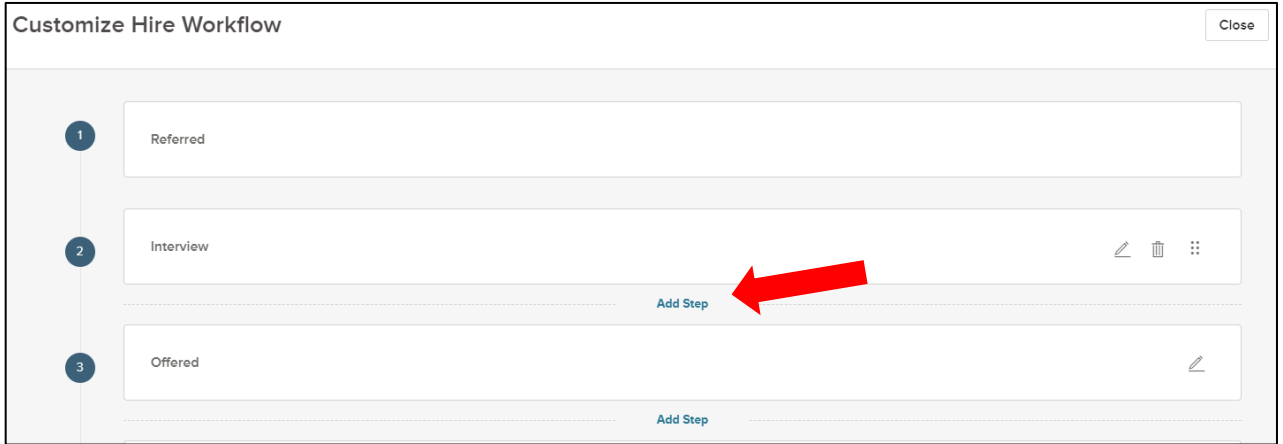
Requisition Information Approvals **Hire Workflow** Candidates

Hire Workflow [Customize Workflow](#)

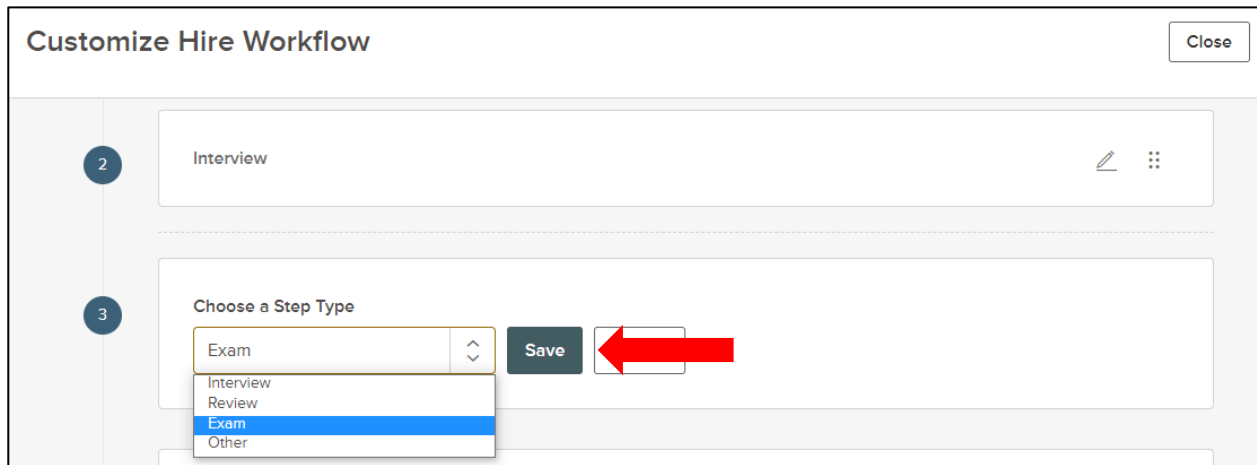
1	Referred	9 Active	9 Total
2	Interview		


NEOGOV

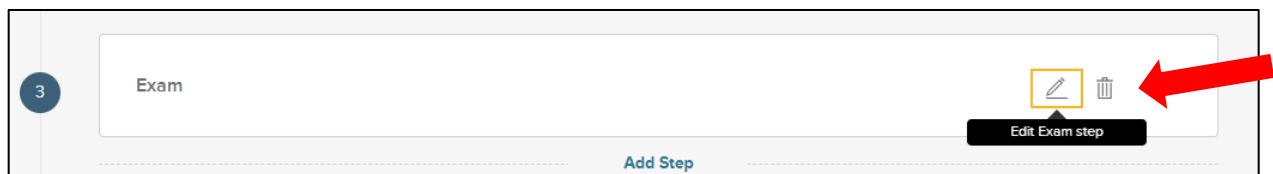
To set up self-scheduling to allow **more than one candidate to select the same timeslot**, you will need to add a workflow step by clicking Add Step below the existing Interview step.



Select "Exam" from the dropdown menu. Click Save.



Now you will see an Interview step and an Exam step (which will need to be renamed). Click  on the Exam step.



In the Step Details screen of the Exam step show below, change the name to either Group Interview or Information Session (or another appropriate name).

Exam

Cancel Save & Close Save & Continue

1. STEP DETAILS ✓ 2. SCHEDULING ✗

Step Details

* required fields are marked with asterisk

Name *
Group Interview/Information Session

Display Status to Candidate As
[Text Field]

Raters
Start typing to find a rater. [Search Icon]

Comment
[Text Field]

Evaluate Using
 Pass/Fail
 Star Rating
 Percentage

Scale
 5 Stars
 10 Stars

Pass Point
★★★★☆ 3 Stars

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

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

Click Save & Continue.

The screenshot displays the 'Exam' configuration interface. At the top right, there are three buttons: 'Cancel', 'Save & Close', and 'Save & Continue'. The 'Save & Continue' button is highlighted with a red arrow. Below the buttons, there are two progress indicators: '1. STEP DETAILS' with a checkmark and '2. SCHEDULING' with an 'X'. The main content area is titled 'Step Details' and includes a note: '* required fields are marked with asterisk'. The 'Name' field is filled with 'Group Interview/Information Session'. The 'Display Status to Candidate As' field is empty. The 'Raters' field is empty with a search icon. The 'Evaluate Using' section has three radio buttons: 'Pass/Fail', 'Star Rating' (selected), and 'Percentage'. The 'Scale' section has two radio buttons: '5 Stars' (selected) and '3 Stars'. The 'Pass Point' section shows a star rating of 3 out of 5 stars.

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

Interview

1. STEP DETAILS ✕ 2. SCHEDULING ✓

Appointment Scheduling

Pre-Configure Interview Slots

1 Email Confirmation

Raters

Send Email Confirmation ←

Subject
Interview Notification - Interview Scheduled

Body
Dear [Rater], You have been scheduled to interview <Candidate Name> on <Date><Time> at <Location>

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

Interview Cancel Save & Close

1. STEP DETAILS ✓ 2. SCHEDULING ✕

Appointment Scheduling

Pre-Configure Interview Slots ←

Allow Candidate Self-Scheduling

In the Select Location(s) field, choose the appropriate interview type (Group Interview or Information Session), and click Done.

The screenshot shows the 'Exam' scheduling interface. At the top, there are 'Cancel' and 'Save & Close' buttons. Below is a progress bar with '1. STEP DETAILS' (checked) and '2. SCHEDULING' (active). The main section is 'Appointment Scheduling' with a toggle for 'Allow Candidate Self-Scheduling' (OFF). A note states '* required fields are marked with asterisk'. The '1 Select Location(s) *' field is highlighted with a red box and a red arrow pointing to a location icon. A tooltip below the icon says 'Click or press enter to view all locations in flyout window.' The text 'Start typing to find a location...' and 'Location is required' are also visible.

The screenshot shows the 'Select Location(s)' flyout window. At the top, there are 'Cancel' and 'Done' buttons. A search icon is in the top right. Below is a table with 1 record selected. The table has columns for 'Location Name' and 'Address'. The first row is selected and highlighted in green. Below the table are navigation arrows and the text 'Showing 1 - 3 of 3 items'.

	Location Name	Address
<input checked="" type="checkbox"/>	Information Session-Details will b...	Details will be provided , Informat...
<input type="checkbox"/>	Online Test	613 North Street , Harrisburg, Pen...
<input type="checkbox"/>	SCSC Test	320 Market Street , Harrisburg, P...

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Select the date, time, and duration for the group interview/information session.

Exam Cancel Save & Close

1. STEP DETAILS ✓ **2. SCHEDULING** ✓

2 Select Available Dates *

May 2021 May 12, 2021

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

3 Select Times

Start Time * 8:00 AM

Duration * 30 min

Select the number of candidates you want to be able to schedule for the same timeslot.

Exam Cancel Save & Close

1. STEP DETAILS ✓ **2. SCHEDULING** ✓

4 Self Schedule Deadline 05/11/2021

5 Maximum Candidates 10

6 Special Notes Enter notes

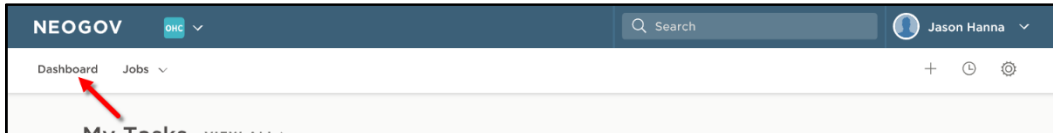
Please Note: If you want to conduct more than one group interview/information session, you will need to repeat this process for each date/time you want to offer.

Schedule Group Interview/Information Session

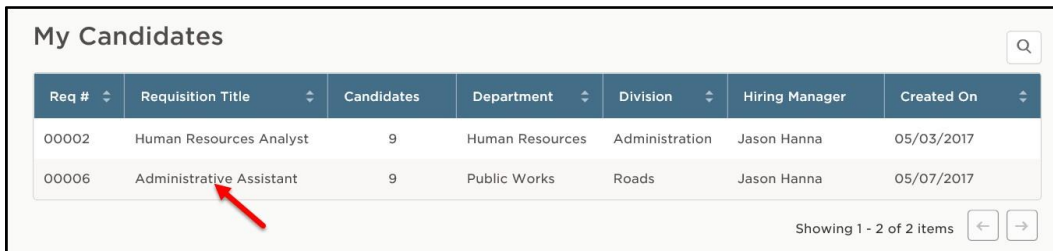
It's now time to move your candidates to the group interview/information session step!

Steps to Schedule Group Interview/Information Session

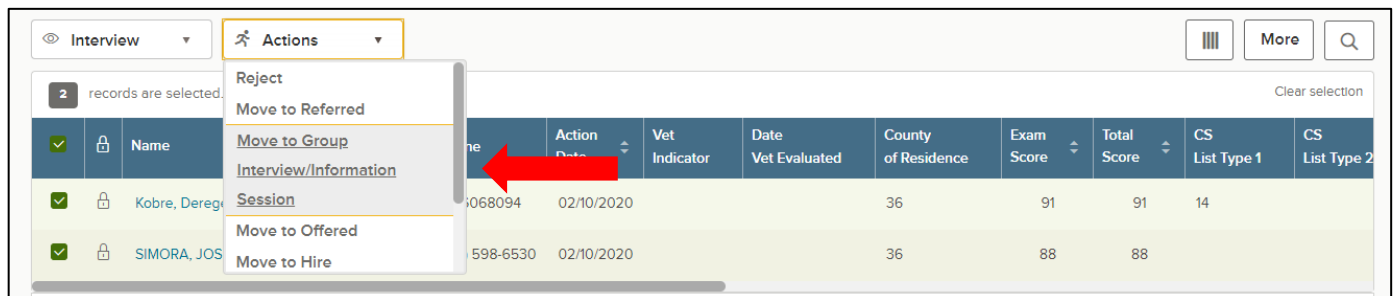
If you're not already viewing your dashboard page, click on the Dashboard link in the upper left corner.



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

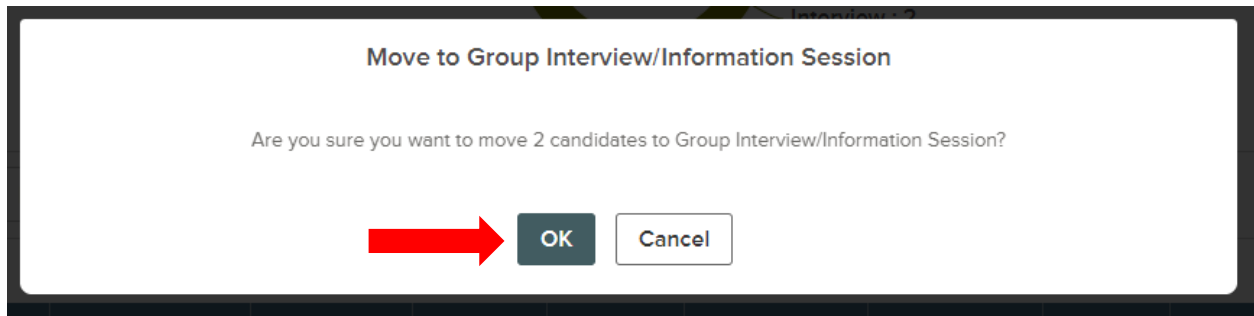


Select the candidates who will be moved to the group interview/information session step. From the Actions menu, click on Move to Group Interview/Information Session.

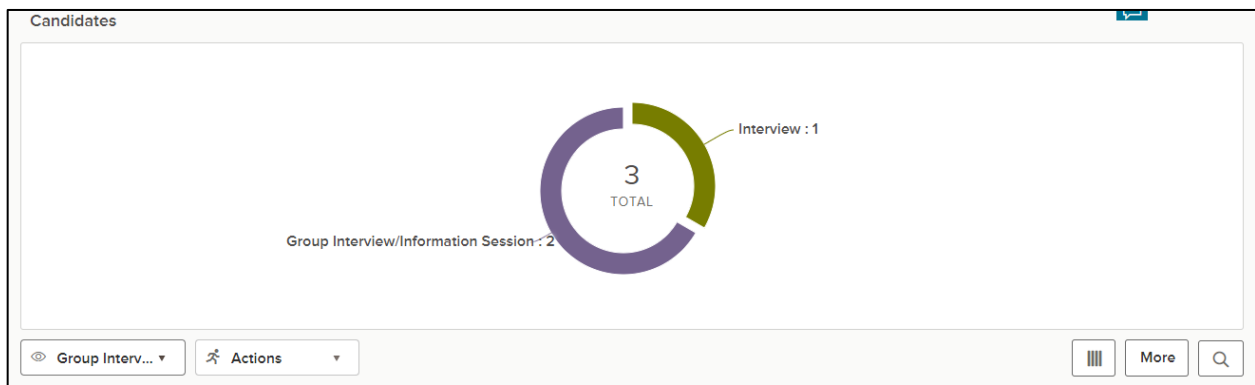


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Click OK to confirm moving the candidates.



The selected candidates have been moved from the referred step to the group interview/information session step.



To see the candidates, you can either click on the appropriate interview step on the donut chart, or from the dropdown menu, click on the appropriate interview step.

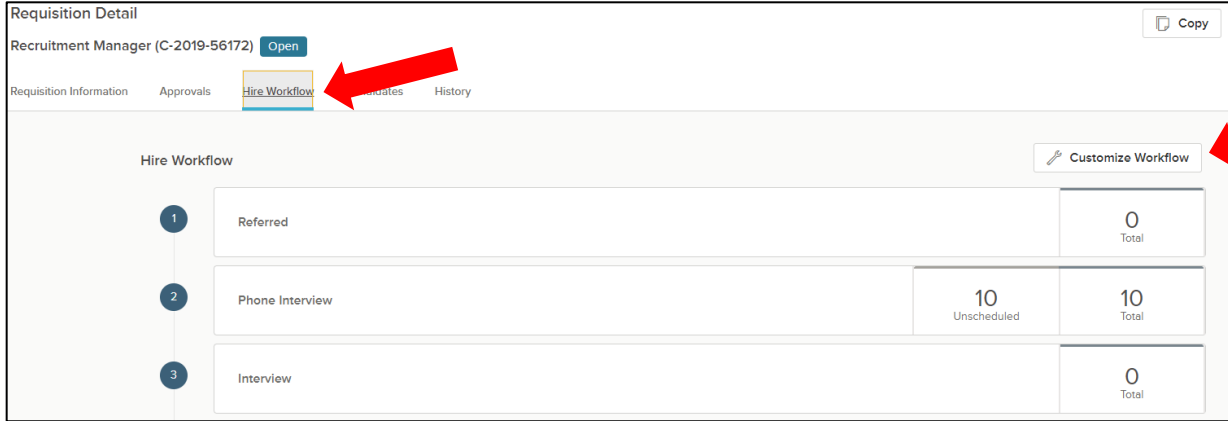
A table showing a list of candidates. The table has 12 columns: Name, Subscribed to, Phone, Action Date, Vet Indicator, Date Vet Evaluated, County of Residence, Exam Score, Total Score, CS List Type 1, and CS List Type 2. Two records are selected, indicated by green checkmarks in the first column. The "More" button from the previous screen is highlighted in yellow above the table. Below the table are navigation arrows and the text "Showing 1 - 2 of 2 items".

	Name	Subscribed to	Phone	Action Date	Vet Indicator	Date Vet Evaluated	County of Residence	Exam Score	Total Score	CS List Type 1	CS List Type 2
✓	Kobre, Derege Wolde	✉	7176068094	05/06/2021			36	91	91	14	
✓	SIMORA, JOSEPH P.	✉	(717) 598-6530	05/06/2021			36	88	88		

NEOGOV


Now you are ready to allow candidates to see the group interview/information session date and time and schedule!

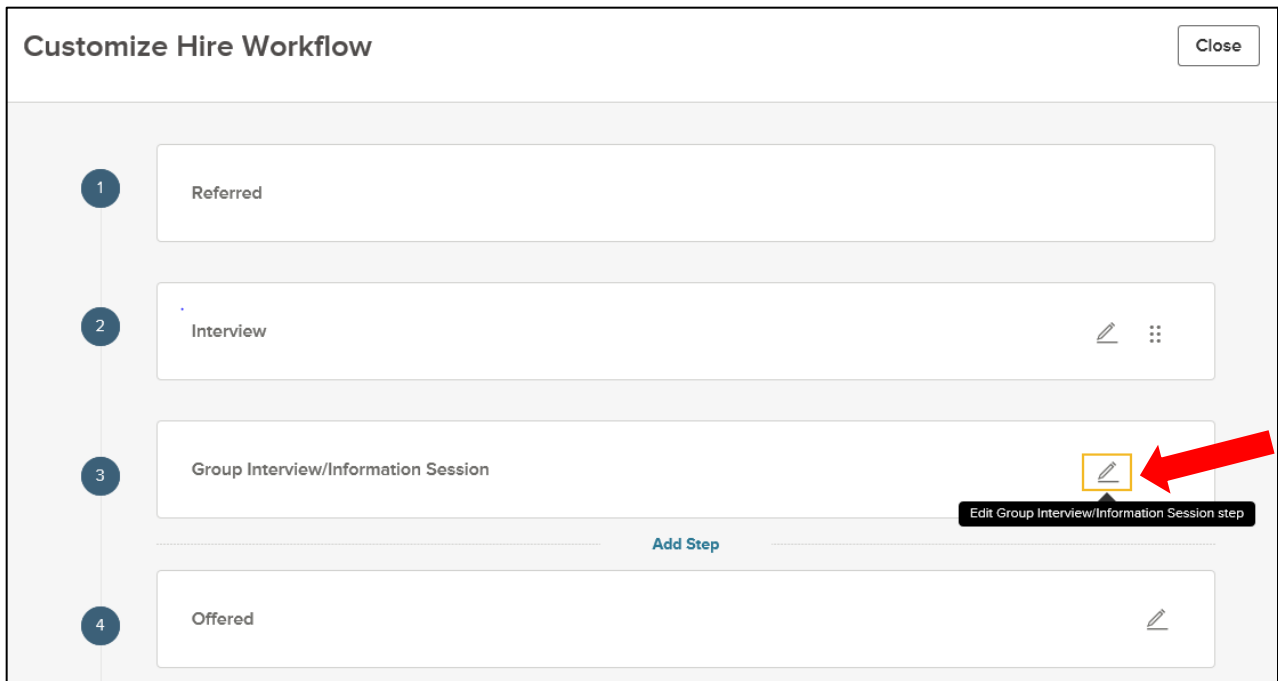
Click on the Hire Workflow tab, then click on Customize Workflow.



The screenshot shows the 'Requisition Detail' page for 'Recruitment Manager (C-2019-56172)'. The 'Hire Workflow' tab is selected, and the 'Customize Workflow' button is highlighted with a red arrow. The workflow steps are:

Step	Step Name	Unscheduled	Total
1	Referred		0
2	Phone Interview	10	10
3	Interview		0

In the group interview/information session step click on the .

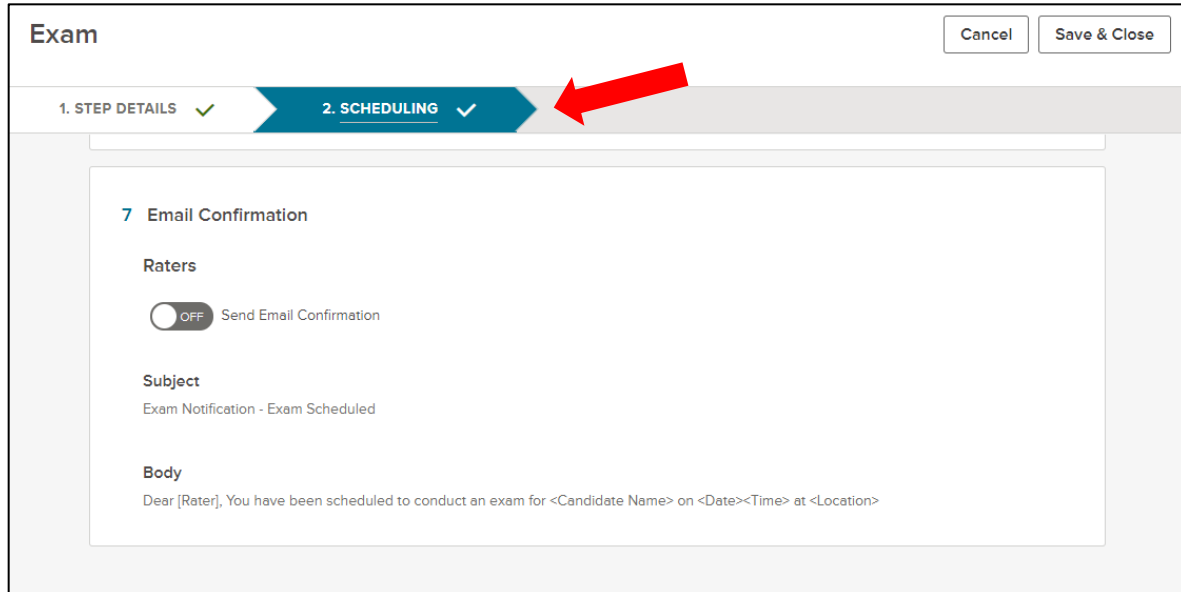


The screenshot shows the 'Customize Hire Workflow' page. The 'Group Interview/Information Session' step is selected, and the edit icon is highlighted with a red arrow. A tooltip reads 'Edit Group Interview/Information Session step'. The workflow steps are:

- 1 Referred
- 2 Interview
- 3 Group Interview/Information Session
- 4 Offered

NEOGOV

Click on the Scheduling tab.



Exam

Cancel Save & Close

1. STEP DETAILS ✓ 2. SCHEDULING ✓

7 Email Confirmation

Raters

OFF Send Email Confirmation

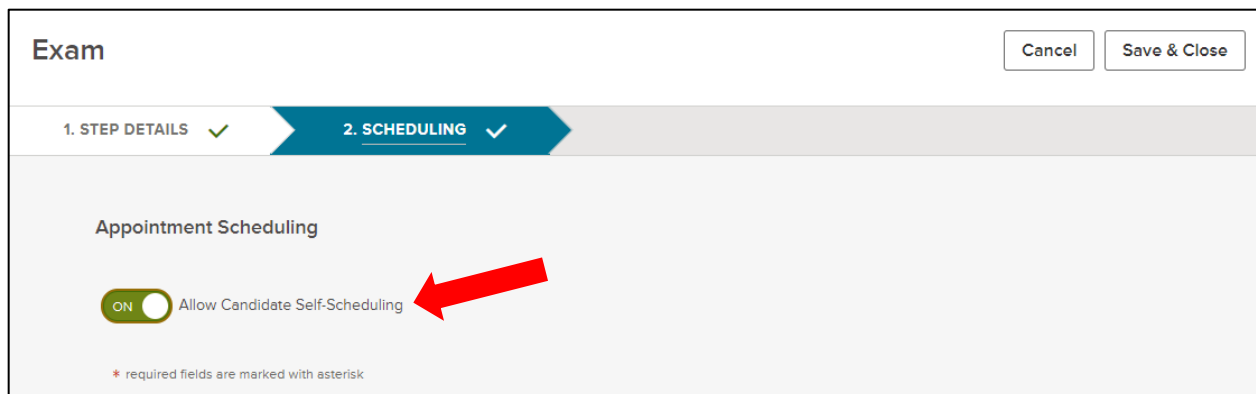
Subject

Exam Notification - Exam Scheduled

Body

Dear [Rater], You have been scheduled to conduct an exam for <Candidate Name> on <Date><Time> at <Location>

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



Exam

Cancel Save & Close

1. STEP DETAILS ✓ 2. SCHEDULING ✓

Appointment Scheduling

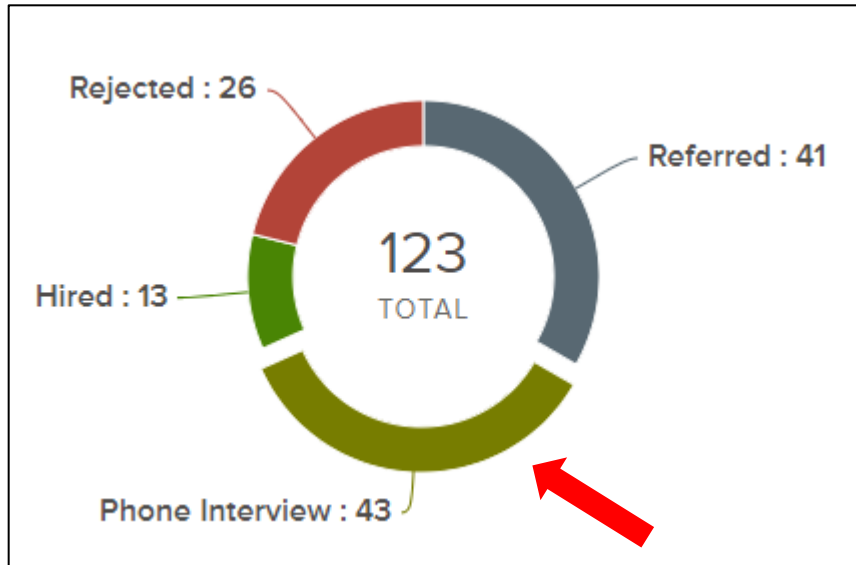
ON Allow Candidate Self-Scheduling

* required fields are marked with asterisk

Send a notice to each candidate alerting them to schedule their interview using the appropriate NEOGOV **OHC** notice template. When sending the notice template, it is critical that you remember to attach the "Candidate Instructions for Scheduling an Interview" document, which is housed on the HR Central website. These instructions are intended to assist candidates as they go through the self-scheduling process.

NEOGOV

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



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

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

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