



DISCOVER EGOV CIVIL SERVICE SOFTWARE

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HR SELECT

# Civil Service Software

HR SELECT

# Administrative Manual

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# Dashboard

Upon login you will be directed to your dashboard screen. This page provides a summary of recent activity related to the Civil Service Portal; Waiting My Action (this section requires workflow setups), Daily Summary and Applications Waiting.

The screenshot shows the HR Select dashboard interface. At the top is a navigation menu with options: Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, My Jobs, My Account, and Log Out. Below the menu, the dashboard is divided into sections:

- Waiting My Action(0)**: A section with a plus icon for expansion.
- Daily Summary**: A table with columns for Date, Exams, Applicant, Applications, Certifications, Documents, Employees, Positions, and Roster Acts. Data rows are shown for dates from 01/26/2022 to 07/14/2022.
- Applications Waiting(22)**: A table with columns for ID, Submitted, App. Type, No, Title, Online, Appv., SSN, Name, Agency, and Dept. It lists five application records with folder icons for each.

Click on any folder icon to go directly to a specific item for review or editing.

A search bar is found throughout HR Select so at any time you can search names and social security numbers to find a record quickly. At times you will also find “advanced filters” - once you click that you will find options that allow you to do a more granular search based on specific filters such as dates, titles, etc.

Throughout the portal clicking on any of the column headers that have a double arrow icon next to it will sort the list by that column as well as sort direction.

## Personnel

The opportunities dropdown includes Rosters, Positions, Payroll Certifications, Payroll Updates, Contingent, Probation, Provisional and RPC modules.

## Rosters

The Roster module provides a comprehensive list of all employee records in the system. The main screen gives you an overview of all employees. Searching can be accomplished using a combination of the advanced filters at the top and also the free form search box. As you began to type a last name, social security number, etc in the search box suggestions will be made. When using the advanced filters at the top, only make selections when you want to limit your results to what you have selected. You can use the Advanced Filters at the top along with any free form searching.

The screenshot displays the HR Select Roster List interface. At the top, there is a navigation bar with the HR Select logo and various menu items: Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, and My Jobs. On the right side of the navigation bar, there are links for My Account and Log Out. Below the navigation bar, the breadcrumb path is Home / Roster List. The main content area features a dark header with 'New Employee' and 'Export List' buttons. Underneath is the 'Advanced Filters' section, which includes several filter categories: Agency (Select Agency), Department (Select Department), Job Title (Select Job), Unions (Select Union), Classification (Select Classification), Type (Select Types), and Status (Select Status). There are also radio buttons for 'All', 'Current', and 'Prior'. A 'Reset Filters' button is located below the filters. Below the filters, there is a search bar and a 'Show 25 entries' dropdown. The search results are displayed in a table with the following columns: ID, SSN(4), Emp. No., Hire, Leave, First Name, Last Name, Agency, Department, Position, and Last. The table shows one entry for Geoff Schmidt, hired on 02/01/2020, working at County DPW as a Laborer. Below the table, there are pagination controls: 'Showing 1 to 1 of 1 entries' and 'First Previous 1 Next Last'.

- **Export List** - The Export Button will export an Excel Workbook of the Employees that are currently selected according to your search and filter criteria.

- **New Employee** - Clicking the New Employee button will open a new employee form and allow you to add an employee to the system that does not already exist.
- **Actions** - Use the folder icon to open an existing Employee Record, the trash can deletes record
- **SSN(4)** – Last four digits of the employee’s ss#
- **Emp. No.** – Employee Number if one is being used
- **Hire** – Employee’s hire date
- **Leave** - The date the employee "left" employment
- **First Name** - The employee’s first name
- **Last Name** - The employee’s last name
- **Agency** - The agency associated with this record.
- **Department** - The department associated with this record.
- **Position** – The position the employee currently holds
- **Last** – The last action on employee history

## Entering a New Employee

To create a new employee first click the link “New Employee” in the upper left corner. A screen will open for the new employee record. Required fields have asterisk.

Type in social security, if that applicant already exists it will prepopulate information from the applicant record. You can also use the search bar to search a name or ss# to find an existing applicant and select them from the list of options the search provides.

The only information absolutely required – **ss#, first name, last name**

**Additional New Employee Fields:**

**Employee #** - if needed system can create employee number based on client's desire or you can use for Munis numbers

**Retirement No** – State retirement no

**Retirement ID** – State retirement ID

**Retirement Plan** – State retirement plan

**Phone Numbers** – Fields for home, work and cell, and also an option to select the primary number to use

**Emails** – Personal email address and work email address fields

**Addresses** – Fields for both mailing and legal addresses

**Dates** –

- DOB – date of birth
- Date Hired – Hire date
- Increment date – Track a date for someone is scheduled to receive an increment – used with increment flag
- Seniority date – when doing promotional exams you can automatically have system calculate Seniority Points
- Date rehired – Based on rules setup you can calculate a rehire date
- Increment Flag – flag to set up an increment
- Retention Date
- Membership Date
- FMLA Date
- Benefits Date
- Anniversary Date
- Adj. Hire Date

**Demographics** – Fields for Gender, Veteran, Marital Status, COVID, Citizenship, Working retired, EEO Race, Exempt FF - Important for NYS Reporting

**Driver's License** – Fields for Driver's License information

**Re-Assignment Info** – Fields for re-assignment tracking

**Timekeeping Info** – Fields for timekeeping information

**Notes** – Any notes on employee

Once new employee information is input and you are ready to save record click on “save employee”. Once the record is saved you will see the summary employee screen that includes a list of subtabs that are now available for that new employee.

The screenshot displays the HR Select interface for an employee named Geoff Schmidt. The top navigation bar includes 'HR Select' and various menu items like Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, and My Jobs. The user's account information, 'My Account' and 'Log Out', is visible in the top right. The breadcrumb trail shows 'Home / Roster List / Employee Schmidt, Geoff'. Below this is a sub-tab bar with 'Summary' selected, along with other tabs like Master, History(0), Documents(0), Pay Certs(0), Messages(0), Tracking, and Versions. A toolbar contains actions: New History, New Message, Print Roster, and Delete Employee. The main content area is divided into several sections: 'Identifying Information' with fields for Social Security Number, Full Name (Schmidt, Geoff), Employee No., Agency, Department, and Division; 'Job Information' with a table for Classification, Job Type, Job Status, Job Time, and Job Title; 'Contact/Address Information' with fields for Mailing Address, Legal Address (NY), Home Phone, Work Phone, Cell Phone, Email, Work Email, Contact Via (postal), Emergency Contact, and Emergency Phone 1 and 2; and 'Date Information' with fields for Hire Date, Anniv. Date, Birth Date, Benefits Date, Leave Date, Membership Date, Retention Date, and Seniority Date.

## Menu Bar

**New History** – Create a new roster action for the employee

**New Message** – Create a new message for the employee

**Print Roster** - Print the employee’s Roster card – this can include any scanned roster cards as well form the document tab for that employee

**Delete Employee** – Delete the employee record

## **Roster – Employee Master Tab**

The master tab displays all information for that employee.

## Roster – Employee History Tab

The history tab displays all roster actions and history for that employee.

The screenshot shows the HR Select web application interface for the Employee History tab. The top navigation bar includes 'HR Select' and various menu items like 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. The user is logged in as 'My Account' and can 'Log Out'. The breadcrumb trail is 'Home / Roster List / Employee Schmidt, Geoff'. The main navigation tabs are 'Summary', 'Master', 'History(1)', 'Documents(0)', 'Pay Certs(0)', 'Messages(0)', 'Tracking', and 'Versions'. Below the tabs, there are action buttons: 'New History', 'New Message', 'Print Roster', and 'Delete Employee'. A search bar is present with the text 'Showing 1 to 1 of 1 entries'. The data table has the following columns: ID, Action Date, Action Type, Agency, Department, Stat., Type, Class, Time, Position/Title, Trn, Wage, and Total Wage. The table contains one entry for the date 05/02/2022, with an action type of 'A', agency of 'GREENE COUNTY', department of 'DEFAULT', status of 'P', type of 'P', class of 'C', time of 'F', and position title of 'ACCOUNT CLERK TYPIST<br>MSD-426'. The wage is listed as '\$18.0000/H' and the total wage as '\$18.0000'. Navigation buttons 'First', 'Previous', '1', 'Next', and 'Last' are shown below the table.

- **Action** - The folder icon opens an existing history record, the trash can deletes the record and play button
- **Action Date** - The date the action is effective from
- **Action Type** – The abbreviation of the history action
- **Agency/Department** – The agency and department associated with employee
- **Stat.** – Status of employee; probationary, permanent, etc. - can be different than type
- **Type** – Type of employment; permanent, temporary, etc.
- **Class** – The classification of the employee; competitive, non-competitive, labor, etc.
- **Time** – Full time, part time, etc.
- **Position/Title** – The title the employee holds
- **Trn** – if they are a trainee
- **Wage** – Employee’s wage
- **Total Wage** – Total wage if additional pays are tracked

## Roster – New History Action

To add a new roster action you click on new history. This opens a new employee history screen.

The screenshot shows a web-based form titled "Roster Information for Schmidt, Geoff J". The form is organized into several sections:

- Action Date:** A date field with a calendar icon, currently showing "mm/dd/yyyy".
- Received Date:** A date field with a calendar icon, currently showing "mm/dd/yyyy".
- Reference Date:** A date field with a calendar icon, currently showing "mm/dd/yyyy".
- Roster Action Code:** A dropdown menu.
- Duration End:** A date field with a calendar icon, currently showing "mm/dd/yyyy".
- Authorization:** A text input field.
- First name:** A text input field containing "Geoff".
- Last name:** A text input field containing "Schmidt".
- Position/Job Information:**
  - Agency:** A dropdown menu.
  - Department:** A dropdown menu.
  - Division:** A dropdown menu with "Please select" as the current value.
  - Job name:** A text input field.
  - Position name:** A text input field.
  - Job Classification:** A dropdown menu.
  - Job Type:** A dropdown menu.
  - Job Status:** A dropdown menu.
  - Job Time:** A dropdown menu.
  - Force Encumber:**
  - Do Not Encumber:**
  - Skip Position Check:**
  - Trainee:**

Everything starts with the action date. It is the date the action is effective. Fill in all pertinent fields.

- **Received date** – Date request received
- **Reference date** – Date of civil service commission meeting where items are approved – can print report based on this date then to take to meeting
- **Roster Action Code** – Preloaded list of actions (added under setup > hist. acts.)

A-[Appointed on probation]  
AA-[Administrative Action]  
AL-[Administrative Leave]  
AP1-[Appointed provisionally on condition exam will be taken when next given (Open competitive.)]  
AP1-[Use if a PC and if it is a promotion or pending classification ]  
AP2-[Failed first exam taken and is appointed provisionally on condition exam will be taken a second time. ]  
AP3-[Failed second exam taken and is appointed provisionally on condition exam will be taken a third time. If failed on third try employee is let go.]  
AT-[Appointed temporary or Temp or Seasonal Staff]  
ATE-[Extended temporary substitute TEM]  
ATE-[Appoint Temp Extended]  
ATS-[Appointed temporary substitute. This means someone has permanent rights to the position. ]  
AV-[Administrative Vacancy- this is on position side. 0000 the current holder and hit enter twice. This should be done on the higher title. Then on employee side give pm to person being promoted and then  
CEP-[Completed extended probationary period]  
CI-[Covered In. ]  
CIC-[Change in Classifications]  
CIH-[Change in Hours ]  
CIT-[Change in Title]  
CJC-[Change in Jurisdiction Classifications]  
CPA-[Contingent permanent appointment. This means appointment was from an eligible list, however, someone has permanent rights to the position. ]  
CPM-[Civil Service Law If promoted to position under section 52.7]  
CPP-[Completed Probationary Period]  
CPS-[Completed Police Supervisor ]  
CPT-[Completed Police Training ]  
CSL-[See CPM]  
DD-[Deceased]  
DIS-[Dismissed]  
DM-[Demoted ]  
ELC-[Elected to position]  
HP-[On leave with Half Pay]  
LA-[Leave of absence]  
LAE-[Leave of absence extended ]  
LAP-[Leave of absence with Pay]  
LO-[Laid Off]  
MA-[Military Absence ]  
Name Change-[Name Change]  
NPS-[No Pay Status]  
NRE-[Not Re-Elected]  
PC-[Pending Classification ]

- **Duration End** – A duration date for time limited actions such as temporary appointments, can list end date

- **Authorization Code** – What is authorizing this transaction, for instance MSD-426
- **Name is prefilled**
- **Agency** – Agency action is for
- **Department** – Department action is for
- **Division** – Division action is for
- **Job Name** – Job title dropdowns
- **Trainee** – If they are trainee
- **Position** – Will prefill with job name
- **Job Classification** – competitive, non-competitive, labor, etc.
- **Job Type** – permanent, temporary, etc.
- **Job Status** – probationary, permanent, etc. - can be different than type
- **Job Time** – full time, part time, etc.
- **Union** – track Union – requires setup
- **Salary Table** – Salary table – requires setup
- **Salary Grade** – Salary grade – requires setup
- **Step** – Salary step – requires setup
- **Base Wage** – the base wage for employee
- **Wage per** – options for how wage is paid, hourly, weekly, etc.
- **Annual Salary** – The annual salary
- **Pay period hours** – How many hours in pay period
- **Pay Quarter** –
- **Additional Pay Types** – Track as many additional pay types as you like, such as longevity, shift differentials, uniform allotments, etc.
- **List Information** – if employee is coming from eligible list you can track the list number, rank and score.

- **Resolution Info** – the resolution number for the action
- **Info Field** – notes or comments regarding action

Once all pertinent information is filled out then click on save history record and the action will be recorded.

### **History Action Notes:**

Change someone from probation to permanent – system can make permanent when probationary period is over (defined by client)

Future Actions - Retirement - you can put action in and save - will not change occupancy, etc. until that date passes - i.e. reporting not effected until after the action date

System will not allow you to put someone into a position that is already occupied unless you explicitly override (maybe to correct encumbrance or occupancy issues from past)

To force encumber check the Force Encumber box.

### **Roster – Documents Tab**

The documents tab allows you to attach documents to this employee. Any number of documents may be attached and categorized (i.e: previous paper roster cards). To upload a document you can drag a file from your desktop into the area marked "Drop files here to upload" or you can use the “Document Upload” link to select a file from your computer to upload.

- **Actions** - Folder icon to view the document and trashcan icon to delete the document
- **Created** - The date the document was attached to this exam
- **Private** - Checking private will ensure that this document is not included when creating email packets of applications or exam information
- **Category** - Documents can be categorized according to type. These categories are defined under Setup > Doc. Cats. Once setup a dropdown under Category will let you select the type you want.
- **Filename** - The filename if the uploaded document

### **Roster – Pay Certs Tab**

This tab will display a complete history of electronic payroll certifications for this employee.

### **Roster – Messages**

Messages can be created to be emailed or mailed and can be tracked in delivery history.

- **Actions** - "Folder icon" is used for viewing a previously created batch of messages, "pencil icon" is for editing, "trashcan icon" deletes the message and the "printer icon" prints the messages
- **Print Date** - The actual print date of the message. This is specified when you create a batch of messages and may not be the current date. For emailed letters, this will be the date the system sends the email. For printed messages, this is the date that will be printed on the message.
- **User** - The user that created the message
- **Subject** - The subject line attached to the message

You may initiate a new message by selecting "New Message" in the dark gray navigation bar. Letters may be deleted using the trashcan icon up until the point they have been "delivered". This is a safeguard mechanism that makes sure any correspondence we have sent to employee cannot be deleted after they have received it.

## Positions

The position control module provides a comprehensive way to track occupancy and encumbrance of positions. Position control is automated from the actions that are placed on an employee. The system will handle it all automatically, for instance, if an employee receives a promotion and is provisional in that position it can track the occupancy in the new position but the ownership of their prior position. It also tracks the EEO information for use in bi-annual reporting.

Positions need to be established in the system and once they are there is not a lot of manipulation that is needed unless a position needs to be reclassified or a new position is needed. The system does all the tracking automatically.

Advanced filters allow you to search based on specific criteria.

The screenshot shows the HR Select web application interface. At the top, there is a navigation bar with the HR Select logo and various menu items: Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, My Jobs, My Account, and Log Out. Below the navigation bar is a breadcrumb trail: Home / Position List. The main content area features a 'New Position' button and an 'Export List' link. A section titled 'Advanced Filters' contains several search criteria: Agency (Select Agency), Department (Select Department), Job Title (Select Job), and Classification (Select Classification). There are also checkboxes for 'Show Abolished' and 'Show Zero Based', and radio buttons for 'All', 'Vacant', and 'Occupied'. A 'Reset Filters' button is located below the filters. Below the filters, there is a 'Show 25 entries' dropdown, a search input field, and a pagination control showing 'Showing 1 to 25 of 207 entries' and page numbers 1 through 9. The main table displays a list of positions with columns for ID, Agency, Department, Pos. No., Pos. Title, Class, Type, Time, Occupant, and Encumbrant. The table contains 8 rows of data.

ID	Agency	Department	Pos. No.	Pos. Title	Class	Type	Time	Occupant	Encumbrant
	COUNTY	DPW	00001-AUTO	HEAVY EQUIPMENT OPERATOR	C	P	F	LASTNAME1, FIRSTNAME1	NOT ENCUMBERED
	COUNTY	CS	00002-AUTO	CIVIL SERVICE CLERK	C	P	F	LASTNAME2, FIRSTNAME2	LASTNAME2, FIRSTNAME2
	COUNTY	CS	00003-AUTO	CIVIL SERVICE CLERK	C	P	F	NOT OCCUPIED	NOT ENCUMBERED
	COUNTY	REC	00004-AUTO	RECREATION LEADER	NC	P	F	LASTNAME3, FIRSTNAME3	NOT ENCUMBERED
	COUNTY	AGING	00005-AUTO	DIRECTOR	C	P	F	LASTNAME4, FIRSTNAME4	NOT ENCUMBERED
	COUNTY	BOE	00006-AUTO	ELECTION SUPERVISOR	C	P	F	LASTNAME5, FIRSTNAME5	LASTNAME5, FIRSTNAME5
	COUNTY	REC	00007-AUTO	PROGRAM SCHEDULER	NC	P	P	LASTNAME6, FIRSTNAME6	NOT ENCUMBERED
	COUNTY	SHERIFF	00008-AUTO	DEPUTY SHERIFF	C	P	F	LASTNAME7, FIRSTNAME7	NOT ENCUMBERED

## Menu Bar

**New Position** – Creates a new position

**Export List** – Creates an export based on filtered results or the complete list.

- **Actions** - "Folder icon" is used for viewing a position and the “trashcan icon” deletes a position
- **Agency/Department** - The agency and department associated with the position
- **Pos. Number** – Can be auto generated, or your own unique position numbers
- **Pos. Title** - The title of the position
- **Class** – The classification of the position – competitive, non-competitive, etc.
- **Type** – The type of position – permanent, temporary, seasonal, etc.
- **Time** – The time of position – full time, part time, etc.
- **Occupant** – The name of the employee who occupies that position
- **Encumbrant** – The name of the employee who encumbers that position

## Positions – New Position

To create a new position click on New Position option under Personnel > Positions. A screen will open to input the new position information. Any required fields will have asterisk.

The screenshot shows the 'New Position' form in the HR Select system. The form is titled 'Position/Job Information' and contains various fields for entering position details. The fields are organized into sections: 'Occupied By' (NOT OCCUPIED), 'Encumbered By' (NOT ENCUMBERED), 'Job Title', 'Job no.', 'Agency', 'Department', 'Division', 'Classification', 'Type', 'Time', 'Status', 'EEO Category', 'EEO Function', 'Benefit group', 'FLSA', 'Budget Code', 'Job Class Code', 'Base Pay Code', 'Classified Date', 'Approval Date', 'Established Date', 'Abolished', 'Abolished Date', 'Zero Based', 'Zero Based Date', 'Allow Multiple', 'Trainee Position', 'Funded', 'Org', 'Object', and 'Project'. The form also has a 'Notes' section and a 'User Field Information' section at the bottom.

- **Job Title** – Will provide a dropdown of titles already setup in system
- **Job No** – Can be setup to auto program or manually enter
- **Position Title** – Provide title of position

- **Agency/Department/Division** – The agency, department and division that position belongs to
- **Classification** – Competitive, Non-competitive, etc.
- **Type** – Permanent, Temporary, Seasonal, etc.
- **Time** – Full time, part time, per diem, etc.
- **Status** – Permanent, Contingent, etc.

## Payroll Certifications

The payroll certification module provides an electronic way to verify payroll automatically.

Payroll Certification can be handled multiple ways. You can use an external spreadsheet (SAVE FILE AS CSV if exported from payroll system) or without a file as an interactive process.

ID	As of Date	Agency	Department	From Date	To Date	Errors	Verified
	09/15/2022	COUNTY	MENTAL HEALTH ADMINISTRATION	08/28/2022	09/10/2022	15	2
	09/15/2022	COUNTY	OFFICE OF SHERIFF - HEALTH	08/28/2022	09/10/2022	4	6
	09/15/2022	COUNTY	OFFICE OF SHERIFF - JAIL	08/28/2022	09/10/2022	98	3
	09/15/2022	COUNTY	OFFICE OF SHERIFF - ROAD	08/28/2022	09/10/2022	98	5
	09/15/2022	COUNTY	PLANNING DEPARTMENT	08/28/2022	09/10/2022	8	1
	09/15/2022	COUNTY	PUBLIC HEALTH	08/28/2022	09/10/2022	17	7
	09/14/2022	COUNTY	FIRE DISTRICT	06/27/2022	07/10/2022	3	25
	09/07/2022	SCHOOL DISTRICT	CENTRAL SCHOOL	07/31/2022	08/30/2022	665	1

## Menu Bar

**Process** – Start the certification process

**Delete** – Delete the certification

**Print Report** – Print the certification report

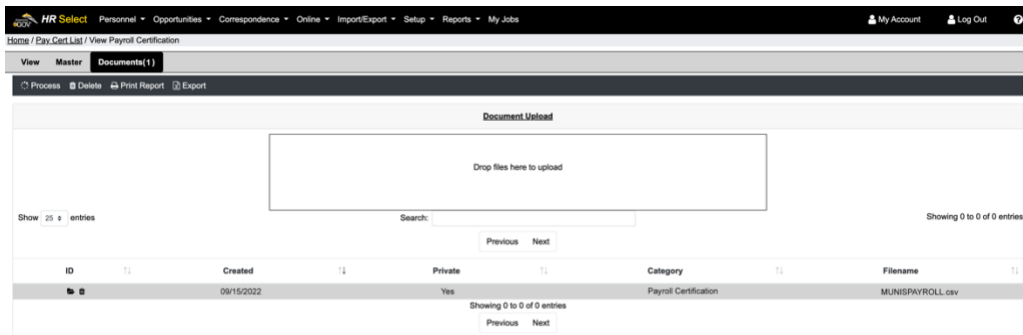
**Export** – Export the certification to excel spreadsheet

## Payroll Certification – with CSV file

To use a CSV file:

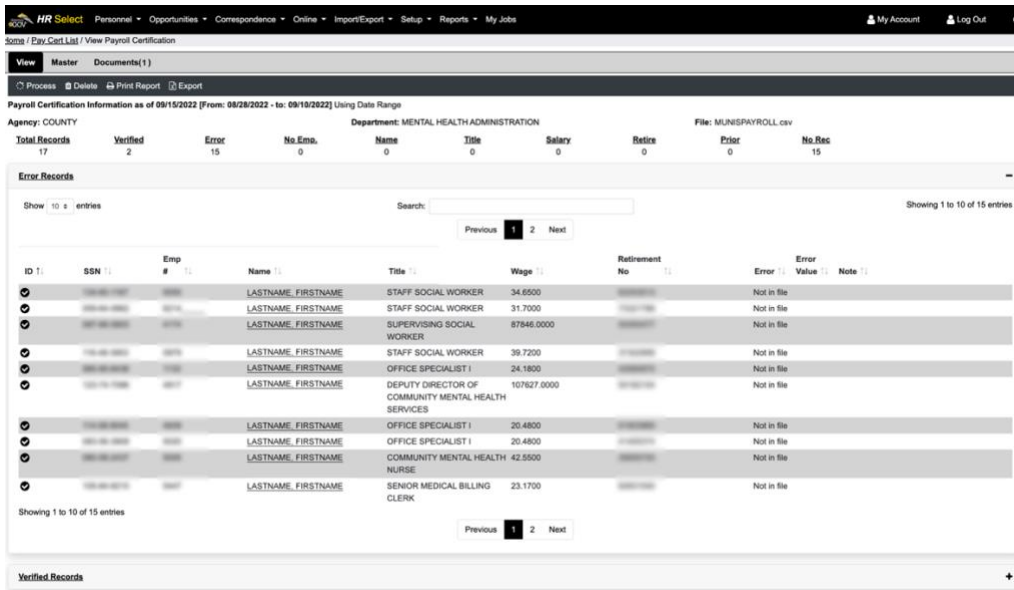
- Go to Personnel > Payroll Certifications
- Click on New Pay Cert in upper left corner
- Fill in the information for the Payroll Certification and Save Certification
- Once certification is setup you will then click on the folder icon to open the new certification

- Click on documents tab and upload your CSV file, select the correct category for the file.



- Click process to start the certification
- Once certification is complete you will see a summary of results in the view tab for that certification showing records that verify, errors and the reasons for the errors (title doesn't match, etc.)

It will do a two-way comparison, it will first look at what is in your CSV file (retirement number, title, etc) and compare it to what is in the system. Then it will look at the system and compare to what is not in your file. For instance, if you have employees showing as active in the Civil Service system but were not in the CSV file, they will show as an exception. Likewise, if you have people in your CSV file but do not appear in the Civil Service system they will show as exceptions at the same time. It is a good way to use as a synchronization tool to make sure systems match.



## Payroll Certification – without CSV file

To create a certification without a file:

- Go to Personnel > Payroll Certifications
- Click on New Pay Cert in upper left corner

- Fill in the information for the Payroll Certification and Save Certification
- Once certification is setup you will then click on the folder icon to open the new certification
- Click process to start the certification
- Once certification is complete you will see a summary of results in the view tab for that certification

## Payroll Updates

The payroll update module provides an electronic way to update payroll using a Discover .csv template.

Prior to using the Payroll Update module be sure that your system is setup to record the appropriate history action for a payroll update in the control settings and you have the appropriate template from Discover.

To use the CSV file:

- Go to Personnel > Payroll Update
- Click on New Pay Update in upper left corner
- Fill in the information for the Payroll Update (agency, department, effective date) and Save Payroll Update
- Once payroll update is setup you will then click on the folder icon to open the new update
- Click on documents tab and upload your CSV file, select the correct category for the file.
- Click process to start the update
- Once the process completes you will see a summary of records found and error records.

A record is counted as **verified** when:

- **Employee is found** in the system
- **No title error** (job title in file matches the system)
- **No leave error** (employee has not left before the as of date)
- It **does not** mean the pay update is complete

Any error records can be fixed at that time and new file uploaded if necessary and process rerun.

To apply the actual pay update to the employee record you would open the “Records Found” accordion and click on the circle with a check icon. That will then open a new screen with the wage, grade, step etc. information found in your .csv file. If you are satisfied with the information in that screen - click approve. That will automatically add a history action into that individual’s record with that specific wage information. It will also move the individual from Records Found to Processed Records. Repeat these steps for all individuals found on spreadsheet.

Date	Wage	Longevity	Additional	Grade	Step
03/09/2026 <input type="checkbox"/>	26.87	0.00	0.00		
Info					
<input type="text"/>					
Auth					
LEG RESO					
<input type="button" value="Approve"/>					

## Contingent Employees

Under Personnel > Contingent you will find an overview listing all contingent employees. Advanced filters allow you to filter your search by Agency, Department or Title. The open folder icon allows you to directly access that employee record.

Home / Roster List / Contingent List

Export List

Advanced Filters

Agency: Select Agency Department: Select Department Job Title: Select Job

Reset Filters

Show 25 entries Search: Showing 0 to 0 of 0 entries

ID	SSN(4)	Emp. No.	Hire	First Name	Last Name	Agency	Department	Title	Status	Cont. Date
			06/01/2022	FIRSTNAME3	LASTNAME3	COUNTY	PURCHASING	BUYER	BC	09/01/2022

Showing 0 to 0 of 0 entries

## Probation Employees

Under Personnel > Probation you will find an overview listing all probation employees. open folder icon allows you to directly access that employee record.

Home / Roster List / Probation List

Export List

Action: Status: PERMANENT Ref Date: 09/26/2022

Show 25 entries Search: Showing 1 to 25 of 599 entries

ID	SSN(4)	Emp. No.	Hire	First Name	Last Name	Agency	Department	Title	Prob Ends	Perm Date
			02/16/2022	FIRSTNAME2	LASTNAME2	COUNTY	BOCES	CLEANER	04/16/2022	04/17/2022

## Provisional Employees

Under Personnel > Provisional you will find an overview listing all provisional employees. Advanced filters allow you to filter your search by Agency, Department or Title. The open folder icon allows you to directly access that employee record.

The screenshot shows the 'Roster List / Provisional List' page in HR Select. It features an 'Advanced Filters' section with dropdown menus for Agency, Department, and Job Title, and a 'Reset Filters' button. Below the filters is a search bar and a table with columns: ID, SSN(4), Emp. No., Hire, First Name, Last Name, Agency, Department, Title, Status, and Prov. Date. The table currently shows 0 entries.

## RPC

The RPC module provides an electronic way to create RPCs. Once the RPC module is setup to mimic your paper form it also requires that all individuals involved with the process are setup as users in the system first (setup > users), then workflow setups need to be created for the RPCs (under setup > workflows). Once those two requirements are met then the RPCs can be created and put into a workflow.

To view a summary of RPCs and their status navigate to Personnel > RPC. A search field is available as well as advanced filters to quickly find specific information.

The screenshot shows the 'RPC List' page in HR Select. It features an 'Advanced Filters' section with dropdown menus for Agency, Department, and Status. Below the filters is a search bar and a table with columns: ID, Created At, Effect. Date, Status, Type, Agency, Department, and Name. The table shows 5 entries.

ID	Created At	Effect. Date	Status	Type	Agency	Department	Name
	10/05/2022	10/19/2022	working waiting on supervisor@county.gov	Other Change	COUNTY	POLICE	FNAME1, LNAME1
	10/05/2022	10/01/2022	working waiting on csofficer@county.gov	OLOA	COUNTY	DPW	FNAME2, LNAME2
	10/05/2022	10/19/2022	working waiting on supervisor@county.gov	OLOA	COUNTY	POLICE	FNAME3, LNAME3
	09/29/2022	09/29/2022	working waiting on csofficer@county.gov	Prob. Appt.	COUNTY	PURCHASING	FNAME4, LNAME4
	09/29/2022	09/29/2022	working waiting on supervisor@county.gov	Prob. Appt.	COUNTY	SCHOOL DISTRICT	FNAME5, LNAME5

- **Actions** - "Folder icon" is used for viewing RPC details and the "trashcan icon" deletes the RPC.
- **Created at** – The date the RPC was created
- **Effect. Date** – The date the change becomes effective
- **Status** - The step the RPC is currently at and whom it is waiting on
- **Type** – The type of change

- **Agency/Department** – The agency and department for the RPC
- **Name** – Name of Employee on the RPC

## RPC – RPC Workflow Setup

As you create your workflow there are two steps that are most important approval and process. The step check marked with process will have a process button for the user responsible for processing the RPC, the step(s) for approval will have an approved button for the user responsible for approving the RPC. A notify step will only provide a notification to user with a secure link to the form – no action from user will be necessary.

**Example Workflow Setup** – Set up your workflow similar to how your paper form moves through its process. This is only an example you can have as many steps or as little steps as needed in your specific workflow. There is an alternate step user field available if after a set number of days (you specify) the form has not been addressed the alternate user will be alerted and can move it along – this helps keep the form moving through the system (although it is not required). A user can appear as many times in a workflow as needed – they are not limited to just one step.

The screenshot displays the 'HR Select' system interface for setting up an RPC workflow. At the top, there is a navigation menu with options like 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. Below the navigation is a 'Home' link and a 'Save Workflow' button. The main section is titled 'Workflow Information for COUNTY - DPW RPC'. It contains several input fields: 'Workflow Name' (set to 'COUNTY - DPW RPC'), 'Work type' (set to 'Employee Changes'), and 'Change type'. Below these are dropdown menus for 'Agency' (COUNTY), 'Department' (DEPARTMENT OF PUBLIC WORKS), and 'Division' (Please select). There are also fields for 'Min pass score', 'Pass Status' (ACTIVE), 'Fail Status' (ACTIVE), 'Pass Approval' (Yes), and 'Fail Approval' (Yes). The next section is 'Workflow Steps for City of Auburn - DPW', which lists three steps. Each step has a 'Step Name' field, a 'Step User' field (with an email address), an 'Evaluate On' dropdown (set to 'Both'), and a 'Max Points' field. Below each step name is an 'Alt Step User' field, an 'Alt Days' field, and a 'Notify Address' field. There are also checkboxes for 'Hard Fail', 'Process Step', 'Notify Only', 'Digital Signature', and 'Export Transaction', along with a 'Remove This Step' option. A 'Description' and 'Comments' field are provided for each step. At the bottom, there is an '+ Add Step' button.

**Comments field** – can add specific direction for the step user.

## **RPC – New RPC**

Once workflows are setup then users can create RPCs. The new RPC form will mimic your paper form, the screen below is only an example form. The more fields that are required the less chance there is of having to track down missing information.

Person inputting RPC can search for employee name but it is in the confines of the agency and the department specified. Once name is found it will prefill information.

If job title is changing you can search for a job title in system

The appointments section, the termination section, and the other changes section should be setup to match your paper RPC. They will select which change(s) they are reporting – they can report multiple changes on one RPC for that employee.

The documents tab allows them to attach whatever documents are necessary, for instance a letter of resignation.

Once all information is filled in they will save the RPC and it will enter the workflow process.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / RPC List

Form Documents

Save RPC

### Report of Personnel Change

Agency: Department: Division:

Last Occupant of Position: Funding:

Effective date: Employee/Applicant Name: G/Clear Employee

Position #: Job Title:

SSN: Emp. ID: Email Address:

First name: MI: Last name:

Birth date: Seniority date: Retirement no:

Address:

City: State: Zip:

Phone: Work phone: Cell phone:

Veteran: Race: Gender:

Base Wage: Wage per: Grade: Step:

#### Appointments

Nature of Change	Options	Eff. Date	Action Necessary
<input type="checkbox"/> Probationary		mm/dd/yyyy	Give Facts Under Remark
<input type="checkbox"/> Permanent		mm/dd/yyyy	
<input type="checkbox"/> Provisional		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Contingent Perm Prob		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Contingent Perm		mm/dd/yyyy	Return Probationary Report
<input type="checkbox"/> Temporary		mm/dd/yyyy	Give Facts under Remarks
<input type="checkbox"/> Substitute		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> For Term of Office		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Unclassified		mm/dd/yyyy	
<input type="checkbox"/> Non-Competitive Class		mm/dd/yyyy	
<input type="checkbox"/> Exempt Class		mm/dd/yyyy	Submit MSD220 for Position Review
<input type="checkbox"/> Labor Class		mm/dd/yyyy	

#### Terminations

Nature of Change	Options	Eff. Date	Action Necessary
<input type="checkbox"/> Resignation		mm/dd/yyyy	Submit Signed Resignation
<input type="checkbox"/> Retirement		mm/dd/yyyy	Give Effective Date
<input type="checkbox"/> Deceased		mm/dd/yyyy	Indicate Date
<input type="checkbox"/> Removal		mm/dd/yyyy	Attach Copy of Proceedings if required
<input type="checkbox"/> Lay-off		mm/dd/yyyy	Give Facts Under Remarks

#### Other Changes

Nature of Change	Options	Eff. Date	Action Necessary
<input type="checkbox"/> Military Leave of Absence		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Other Leave of Absence		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Transfer		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Demotion		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Suspension		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Reassigned		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Reinstatement		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Change in Salary		mm/dd/yyyy	Indicate New Salary
<input type="checkbox"/> Change in Name or Address		mm/dd/yyyy	Give Facts Under Remarks
<input type="checkbox"/> Other		mm/dd/yyyy	Give Facts Under Remarks

Comments

Sample RPC form

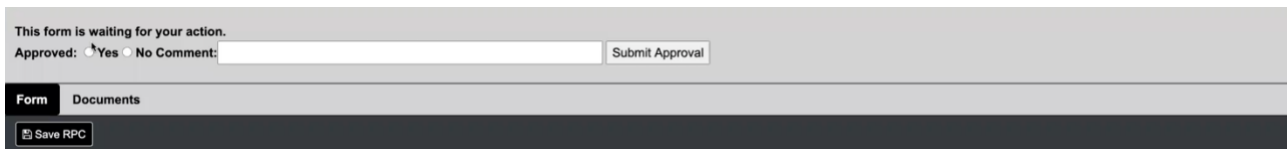
## RPC – RPC Workflow Process

Once the RPC is saved it goes into the workflow process and the first step in the workflow begins. The user in the first step will receive an email notification that an Employee Change form has been submitted and it is waiting their action. When they open the RPC (depending on what type of step it is, approval or process) they will see directions for their input and the workflow can continue.

### This is an example if the step is an approval step:

User will see input bar at top of the RPC, asking if it is approved and comments. If approved, they check yes and submit approval and RPC moves to next step based on workflow setup.

If RPC is not approved, a reason should be noted in comment section, then the originator of the form will get an email stating it was not approved and the comments on why it was not, and they can start the cycle again correcting the reason for disapproval.



This form is waiting for your action.  
Approved:  Yes  No Comment:

Form Documents

### This is an example if the step is a process step:

User will see input bar at top of the RPC, asking if they want to process it. To process they will click on process form button. The form will process and it will take user right into a roster action screen for that employee. The roster action for that employee change can then be entered and process finished.



This form is waiting for you for processing.

Form Documents

### A notify step:

A notify step will only provide a notification to the user in that workflow step with a secure link to the form – no action from user will be necessary.

## Opportunities

The opportunities dropdown includes Exams, Applicants, Applications, Certifications and Preferred modules.

### Exams

The exam module provides a comprehensive list of all exam records in the system. The main screen gives you an overview of all exams. The search feature offers advanced filters for granular searching with dates, job titles, etc. There are also links in upper left corner for adding a new exam or exporting a list of exams.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Exam List

New Exam Export List

Advanced Filters

Job Title   All  Active  Expired

Exam Date/From  to

Est Date/From  to

Exp Date/From  to

Reset Filters

Show 25 entries Search:  Showing 1 to 2 of 2 entries

Previous 1 Next

ID	Exam No	Type	Title	Deadline	Exam Date	List Date	List Expires	App. Cnt.	Appv. Cnt.	Dis. Cnt.
	12345	OC	ACCOUNT CLERK TYPIST - OC 03/2022	03/28/2022	04/09/2022	03/02/2022	03/02/2023	1	1	0
	000001	OC	OFFICE AIDE - TEST ONLY					0	0	0

Showing 1 to 2 of 2 entries

Previous 1 Next

- **Action** - Use the folder icon to open an **EXISTING** Exam Record
- **Exam No** - The number assigned to the Exam
- **Type** - OC - Open Competitive, PROM – Promotional, CR – Continuous Recruitment
- **Title** - The title of the Exam. This can be the job title or a custom title you assign to the exam
- **Deadline** - Last date to apply for exam
- **Exam Date** - The date the Exam will be given

- **List Date** - The date the eligible list has been established for this exam.
- **List Expires** - The date the eligible list will expire for this exam
- **App Cnt.** - The amount of applications for this exam
- **Appv. Cnt.** - The amount of approved applications for this exam
- **Dis. Cnt.** - The amount of disapproved applications for this exam

## Entering a New Exam

To create a new exam first click the link “New Exam” in the upper left corner. A screen will open for the new exam record. Required fields have asterisk.

The screenshot shows the 'New Exam' form in the HR Select system. The form is organized into several sections:

- Header Information:** Contains fields for Exam Number, Public Number, Type, Job Title, Exam Title, Exam Group, State Exam Series, State fee, Local fee, Total Fee, Given by, Calculator, Exam Length, Booklets, Salary, and Approval Workflow. There are also checkboxes for Active, Bandscored, State List, Continuous, Lunch, Canceled, No List, Public, Sort Dept., Sort Trainee, T&E, and Review Avail?.
- Date Information:** Contains date pickers for Requested Date, Publish Date, Deadline Date, Amendment Deadline, Exam Date, Scores Date, Established Date, and Expire Date.
- Phases:** A table with columns for Phase, Phase Date, Required, and Coms Review. There is an 'Add Phase' button.
- Notices:** Contains date pickers and dropdown menus for Passing Score Notice Date, Falling Score Notice Date, Elig. Notice Date, and Inelig. Notice Date. It also includes checkboxes for Pass Score Notice Created, Fall Score Notice Created, Elig. Notice Created, and Inelig. Notice Created.
- Reason for Holding:** A text input field.
- Comments:** A text input field.
- Qualifications:** A text input field.

- **Exam No** - The state assigned exam number

- **Public No** - The number you use to "advertise" the exam locally
- **Type** - Open Competitive (OC), Promotional (PROM), etc.
- **Job** - The job title this exam is associated with. These are defined under Setup -> Job Titles
- **Exam Title** - The title of the exam. Defaults to the job title but may be modified
- **Exam Group** - Used to group like exams together for certification. All exams of the same Exam Group may be combined for selection on one certification. System will exhaust first exam cert list first before starting on next exam cert list if they are in same exam group.
- **State Exam Series** – Select option for state exam series
- **State Fee – Local Fee – Total Fee** – Fields for fees associated with the exam, can break apart to use later for reporting purposes
- **Given By** – If it is State decentralized, State Prepared and Rated or Local
- **Calculator** – Select for calculator use – this can be used in letters pertaining to exam
- **Exam Length** – The length of the exam (ie. 6 hours) – this can be used in letters pertaining to exam
- **Booklets** – The number of booklets you have ordered for this exam
- **Salary** – The expected salary or salary range for positions filled from this exam
- **Approval Workflow** – If workflow is setup then it can be assigned with dropdown option (setup required under setup > workflows)
- **Checkboxes**
  - **Active** – Not necessary – uses expired and published dates
  - **Bandscored** - Whether this exam is bandscored
  - **State List** – Only for Director of Facilities exam, check it and then attach the list directly from state and it will do everything for you.
  - **Continuous** – check box if not related to an exam
  - **Lunch** – if exam has a lunch break
  - **Canceled** – If exam is canceled
  - **No List** - If set to "yes", the exam listing will show "No List" instead of established and expiration dates. Visual Indicator - useful for when after testing you do not establish a list.

- **Public** - If using the Application Portal and set to yes, this will make the list viewable online according to your specifications.
- **Sort by Dept** - If yes, the eligible list will be sorted by the department associated to the applicant and application. Typically used for promotional lists
- **Sort Trainee** - If this is set to "yes", the list will be established and sorted by Non-Trainee and then Trainee applicants according the how the application was entered.
- **T&E (Training and Experience)** - type instead of exam
- **Review Avail?** - If a review is available.

- **Dates**

- **Requested Date** - The date you requested this exam from the state if applicable
- **Published Date** - The date and time you begin to advertise and accept applications for this exam
- **Deadline Date** - The last date and time someone can submit an application
- **Amendment Deadline** – The date the exam is amended (if applicable)
- **Exam Date** - The date and time this exam is to be given
- **Scores Date** - The date this exam was scored or the scores were applied to this exam will autofill once scoring is completed
- **Established Date** - The date the eligible list was established for this exam
- **Expire Date** - The date the eligible list expires for this exam

- **Phases** – Setup for performance test(s) the exam requires – initial setup of the performance tests are done under setup > perf tests. Once they are setup click on “add phase” in the exam master tab, the test will be available in the dropdown under Phase. Test scoring will be administered on scoring tab and scheduling for each phase can be done on the schedule tab. Required button directly relates to Eligible list, if phase is required the individual will appear restricted on list until phase is completed.

Phases				
Phase	Phase Date	Required	Comp Review	
AGILITY - CPO/PO	06/25/2022, 08:00 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">- Remove This Phase</a>
<a href="#">+ Add Phase</a>				

- **Notices** – Setup of dates and letter templates for important notices specific to the exam.
- **Reason for Holding** – Comments on why exam was held

- **Comments** - Internal comments associated with this exam. Typically for office use only.
- **Qualification** - The qualifications required for candidates to take this exam

Once fields are completed save the exam using button in upper left corner.

## Viewing/Editing Existing Exams – Master Tab

To view/edit an existing exam click on the folder icon next to the exam you want to open. This will open a screen with the details of that exam record. Once you edit the exam click save exam button in upper left.

The screenshot displays the 'HR Select' interface for editing an exam. The top navigation bar includes 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. The breadcrumb trail shows 'Home / Exam List / Exam 000001'. The 'Master' tab is active, with a sub-menu containing 'Delete Exam', 'Print List', 'Print Roster', 'Establish Eligible List', 'Export', 'Email Packet', 'New Message', 'New Canvas', and 'Clone Exam'. A 'Save Exam' button is located in the top left of the form area.

**Header Information**

Exam Number:\* 000001    Public Number:    Type:\* Open Competitive    Job Title:\* OFFICE AIDE

Exam Title:\* OFFICE AIDE - TEST ONLY    Exam Group:    State Exam Series: Select Options

State fee: 0.00    Local fee: 0.00    Total Fee:\* 15.00    Given by:\* Locally Prepared and Rated    Calculator:\* ALLOWED    Exam Length:

Booklets:    Salary:    Approval Workflow: Please Select

Active     Continuous     No List     Sort Dept.     T&E  
 Bandscored     Lunch     Public     Sort Trainee     Review Avail?  
 State List     Canceled

**Date Information**

Requested Date: mm/dd/yyyy    Publish Date: 06/20/2022, 07:00 AM    Deadline Date: 12/31/2022, 11:59 PM    Amendment Deadline: mm/dd/yyyy, --:-- --

Exam Date: 01/10/2023, 08:00 AM    Scores Date: mm/dd/yyyy    Established Date: mm/dd/yyyy    Expire Date: mm/dd/yyyy

**Phases**

Phase	Phase Date	Required	Comp Review
+ Add Phase			

**Notices**

## Menu Bar

**Delete Exam** - This will delete this exam record. Exams with applicants will not be able to be deleted without all associated information being deleted first.

**Print List** - Print the CURRENT Eligible List for this Exam

**Print Roster** - Print the Exam Candidate Roster

**Establish Eligible List** - Once you have completed all scoring tasks, clicking 'Establish Eligible List' will allow you to establish the INITIAL Eligible List from all the applicants. The system will automatically fill in the current date as the established date and the expiration date based on your setup.

**Export** – Creates an export of the Exam information and associated applicant information

**Email Packet** - Email the Application packet via a secure link – fields/checkboxes for specific application selections.

### Email Application Packet x

Please enter the email address or email addresses below that you would like this information to be emailed to. The recipient(s) will receive a secure link to view this email. Please separate multiple recipients with a comma.

**Email Address:**

**Include Documents**                       **Eligible Only**  
 **Approved Only**                         **Only Passing**

**App Date Range**                              **From Score**  
mm/dd/yyyy  to mm/dd/yyyy                        to

**Status:**

**New Message** - Create new messages for exam (viewable under messages tab)

**New Canvass** - Create new canvass for exam (viewable under canvass tab)

**Clone Exam** - Makes a duplicate copy of the exam and ALL of its associated data including applicants

## Exams – Applications Tab

The application tab under an exam provides an overview of all applications received for that specific exam. The statistics bar is populated with counts of different application details (see descriptions below). The application list is searchable. To view a specific application click on the folder icon. You may also add a new application manually

for this exam with the new application link. New applications can be added multiple ways; under a specific applicant, under applications and under a specific exam – each will pre-populate different fields based on where it is added.

The screenshot shows the HR Select system interface. At the top, there is a navigation menu with options like Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, and My Jobs. Below this, the breadcrumb path is 'Home / Exam List / Exam 000000'. The main content area is titled 'Applications' and includes a sub-menu with options like Delete Exam, Print List, Print Roster, Establish Eligible List, Export, Email Packet, New Message, New Canvas, and Clone Exam. A summary table shows the following data:

Total	Appr	Disapp	Cond	NA	Pass	Fail	FTA	WD	InAct	Appt	Active
2	2	0	0	0	1	0	0	0	0	0	1

Below the summary table, there is a search bar and a table of applications. The table has columns for ID, Submitted, App., Status, SSN, Last Name, First Name, Final Score, Agency, and Department. Two entries are shown:

ID	Submitted	App.	Status	SSN	Last Name	First Name	Final Score	Agency	Department
	04/28/2022 10:25 am	Y			SCHMIDT	GEOFF			
	05/02/2022 10:09 am	Y	ACTIVE		SCHMIDT	GEOFF	90.0	CITY	DPW

## Applicant Statistics

- **Total** - The total number of applicants applying for this exam
- **Appr** - The total number of Approved Applicants for this exam
- **Disapp** - The total number of Applicants NOT APPROVED for this exam
- **Cond** - The total number of Applicants CONDITIONALLY APPROVED for this exam
- **NA - No Action** - The total number of Applicants waiting to be approved/determined.
- **Pass** - The total number of Applicants that have passed the written portion of this exam
- **Fail** - The total number of Applicants that have FAILED the written portion of this exam
- **FTA** - The total number of Applicants that have FAILED TO APPEAR for the written portion of this exam
- **WD - Withdrew** - The total number of Applicants that WITHDREW from this exam
- **InAct - Inactive** - The total number of Applicants that have been determined to be "INACTIVE" on the eligible list
- **Appt - Appointed** - The total number of Applicants Appointed from this eligible list.
- **Active** - The total number of Applicants Active on the eligible list

## **Exams – Adding a New Application**

When adding a new application under an exam the new application will pre-populate with the date and time, the exam's application type and exam name. Click on new application in upper left and a new application screen will open.

You can use the applicant search to find individuals, however if that person has never been loaded into the system you will just go about entering their information in the application and an applicant file will be created.

You will have one applicant record per social security number. If you try to add a duplicate social you will not be able to save it – an error will alert you that number is already used.

The screenshot shows the HR Select application form. At the top, there is a navigation bar with 'HR Select' and various menu items like 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. Below the navigation bar, there are buttons for 'Save Only' and 'Save & Exit'. The form is divided into several sections: 'Applicant Info' (Social Security Number, State Person ID, No Apps Allowed, No App Reason, First Name, MI Name, Last Name, Home Phone, Work Phone, Cell Phone, License State, License Number, Email, Birth Date, Gender, EEO Race, Contact, CIQ On File, CIQ Date, Transcripts On File, Transcripts Date), 'Veteran Info' (Veteran, From Date, To Date, Credits Used), and 'Mailing Address' (Address, Address2).

Fill in basic Applicant Info fields accordingly. No apps allowed checkbox prohibits individuals from filling out applications and you can provide the reason why under no app reason field.

Then move on to payment information, agency/department and other specifics for the exam itself:

- **Pay Method** - the way a person is pay for exam, check, money order, etc.
- **Pay Ref #** - check number or money order reference number you want to use – when taking online applications it will be CC transaction number
- **Date Paid** - Date on check or money order - for reconciling later
- **Payee** - if there is a person paying for another person you can list name here
- **Agency/Department** - Dropdown selections - these will prefill for PROM exams if there is an employee record in the system for the person applying
- **Checkboxes:**
  - Veteran status on application (check veteran)
  - Special accommodations (check requested accommodations)
  - Cross filing (check cross filer and enter location they are taking it at), etc.
  - Requested Accommodations (check if special accommodations are needed)
  - Requested Alt. Date (check if they requested another exam date)
- **Notes** – any internal notes you want to make

Pay Method Please Select	Pay Ref #	Date Paid mm/dd/yyyy	Payee
Agency Please select		Department Please select	
<input type="checkbox"/> Veteran	<input type="checkbox"/> Union Member	<input type="checkbox"/> Cross Filer	
<input type="checkbox"/> Requested Accommodations	<input type="checkbox"/> Requested Alt. Date		
Notes			

Administrative Info section of Application – typically where you will do the most work on an application.

**Approved** – list of options for the application – yes, no, conditional

**For Approved** - If you answer yes, an approval comment field will appear

**For Disapproved:** If you answer no, disapproval reason and disapproval comment will appear.

Disapproval Reason should be a general statement such as: Lacks minimum qualifications. (you can either type into that field or they can be setup for ones that are used most often, under setup > disapproval reasons)

Then Disapproval comment area can go into more detail and be specific to applicant: Applicant did not show the required 4 years of experience in accounting as outlined in the announcement.

These reasons and comments will then be available to insert into your letters to applicants – they will fill automatically with these fields.

**For Conditional** - Reason (can setup under setup > cond. reasons) and comment fields similar to not approved above, state general reason and then a more detailed comment.

#### Checkboxes:

- **Conditional** - For conditional approvals
- **Restricted** - If you have an instance where someone needs to be restricted outside of typical ones for performance exams; for instance: if a police officer can sit for an exam before a future birthday – they may be restricted
- **Restricted Reason and Restricted Comment** - same as above, reason is short general statement and comment is more detailed explanation.
- **Trainee** - flag an application as a trainee application

#### Dates:

- **Alternate Date** - if an alt date has been approved you can fill in alt date of test and reason for it.
- **Eligible Date** - goes hand in hand with restricted checkbox, you can put the date in that they do become eligible and if a list is established they will then appear on the list on that date.
- **Determination Date** - track date you made determination of approved or disapproved.
- **Provisional** - will get checked automatically if person is on file already as provisional employee

Once all fields are filled out to your satisfaction then save using Save buttons in upper left corner.

Administrative Info

Approved:   Conditional  Restricted  Trainee List Status:

Disapproval Reason:\*

Disapproval Comment

Alternate Date:   Alternate Reason:  Eligible Date:

Determination Date:    Provisional

List note

## Exams – Eligible List

If an eligible list has been created the Eligible List tab provides the current on-screen version of the eligible list for that specific exam. This is automatically re-ranked for you when you click this tab. To create a list, once you have completed all scoring tasks, clicking 'Establish Eligible List' in dark gray bar will establish the INITIAL Eligible List.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out ?


Home / Exam List / Exam 000000

Master Applications **Eligible List** List Notes Scoring Schedule Attendance Documents Messages Canvass Online Versions

Delete Exam Print List Print Roster Establish Eligible List Export Email Packet New Message New Canvass Clone Exam

Show 25 entries Search:  Showing 1 to 1 of 1 entries

Previous **1** Next

ID	Orig Pos.	Cur Pos.	Rank	Status	Name	Base Score	Vet Credits	Sen Credits	Final Score
 1	1	1	1	ACTIVE	SCHMIDT, GEOFF	90.0			90.0

Showing 1 to 1 of 1 entries

Previous **1** Next

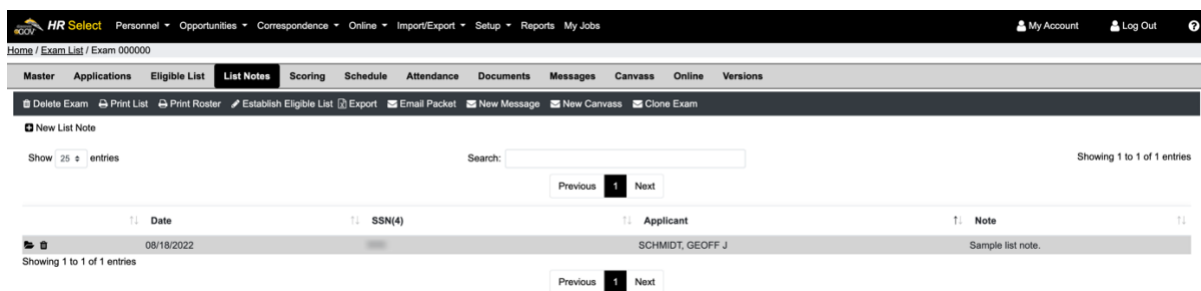
You may search for particular candidates using the Search Box.

- **Action** - Folder icon next to an applicant will open their application
- **Orig Pos** - The original position on the eligible list of the applicant when the list was established
- **Cur Pos** - The current position on the eligible list of the applicant
- **Rank** - The current ranking on the eligible list of the applicant
- **Status** - The status of the applicant
- **Name** - The applicant's full name
- **Base Score** - The base score of the written test

- **Vet Credits** - Any veterans credits used
- **Sen Credits** - Seniority Credits
- **Final Score** - The final score of the applicant including any additional credits

## Exams – List Notes

This tab gives you the ability to attach notes to a particular applicant which are then printed on the eligible list.



- **Actions** – The folder icon opens the note, the trashcan icon deletes the note, search bar to search notes, new list note to add notes
- **Date** - The date you want the list note to appear
- **SSN(4)** - The last four digits of Social Security Number of the Applicant
- **Applicant** - The Full Name of the applicant
- **Note** – The actual List Note that appears on the "Long" Eligible List

To create a note use the New List note option in upper left corner and you will be presented with this screen. Select date you want the note to appear, then select the applicant from a dropdown of all applicants for that exam and add the note, then save.

List Note x

**Save Note**

**Note date**

**Applicant**

**Note**

## Exams – Scoring

This tab contains all the relevant scoring information for the exam including written scores (entry and maintenance of written scores and associated information), performance testing scores and any associated band scoring.

The screenshot shows the HR Select Scoring interface. At the top, there is a navigation bar with 'HR Select' and various menu items. Below that, a breadcrumb trail reads 'Home / Exam List / Exam 000000'. The main navigation tabs include 'Master', 'Applications', 'Eligible List', 'List Notes', 'Scoring' (which is active), 'Schedule', 'Attendance', 'Documents', 'Messages', 'Canvass', 'Online', and 'Versions'. A secondary bar contains actions like 'Delete Exam', 'Print List', 'Print Roster', 'Establish Eligible List', 'Export', 'Email Packet', 'New Message', 'New Canvass', and 'Clone Exam'. The main content area is titled 'Bandscore' and 'Written' for 'AGILITY PO'. It features a search bar and a table with columns: SSN, Name, Status, Raw Score, Base Score, Vet Credits, Sen Credits, Final Score, and Valid Until \*CR Only. The table contains two entries for 'SCHMIDT, GEOFF'. The first entry has a Raw Score of 0.00 and a Base Score of 0.00. The second entry has a Raw Score of 0.00 and a Base Score of 90.00. Navigation controls for 'Previous', '1', and 'Next' are visible at the bottom of the table.

SSN	Name	Status	Raw Score	Base Score	Vet Credits	Sen Credits	Final Score	Valid Until *CR Only
	SCHMIDT, GEOFF		0.00	0.00	0.00	0.00	0.00	
	SCHMIDT, GEOFF	ACTIVE	0.00	90.00	0.00	0.00	90.00	

- **Actions** - Search bar to search for applicants or ss#
- **SSN** - The Social Security Number of the Applicant
- **Name** - The Full Name of the applicant
- **Status** - The current status of the Applicant. The available statuses are maintained under Setup > App. Statuses. You may change the status by selecting any available status from the drop-down
- **Raw Score** - The "RAW" score used for band scoring. This is only applicable on exams setup as "bandscored".

- **Base** - The base written score. This may be entered directly by clicking in the field and entering score or filled in by the system when using the Raw Score combined with the Bandscore table.
- **Vet Credits** - Veterans Credits
- **Sen. Credits** - Seniority Credits
- **Final Score** - The total score that is calculated. For non-bandscored exams, this is BASE+VC+SC. For band-scored exams, this is BASE+VC as the SC is used in determining the Raw Score for band scoring.

## Exams – Scoring File

Using the document tab you may attach a scoring file to this exam. The system will recognize the scoring file and you will have the option to "Import Scores". This will allow you to automatically score this exam based on a scoring file.

The screenshot shows the HR Select system interface. At the top, there is a navigation bar with the HR Select logo and various menu items: Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, and My Jobs. On the right side of the navigation bar, there are links for My Account and Log Out. Below the navigation bar, there is a breadcrumb trail: Home / Exam List / Exam 65-745. The main content area is titled "Document Upload" and features a large rectangular box with the text "Drop files here to upload". Below this box, there is a search field and a pagination control showing "Previous 1 2 Next". At the bottom of the page, there is a table with columns for ID, Created, Private, Category, and Filename. The table contains one entry with the following details: ID (with a dropdown arrow), Created (12/07/2021 09:37 AM), Private (No), Category (z EXCEL Spreadsheet), and Filename (Scores - County Police Officer \_ Police Officer\_Roster.csv). The table also shows "Showing 26 to 27 of 27 entries" and a "Show 25 entries" dropdown.

## LARGE EXAM FILES PROVIDED FROM THE STATE (I.E. DIRECTOR OF FACILITIES)

Download the appropriate files from the State Website. Export as Excel Document and keep it in .csv format – file wherever you normally put the scores. Because of an error in the state file, open the csv in Excel and re-save the CSV. This will fix the formatting error.

On the exam setup screen, there is a check box for “State List” next to the Exam Group. By checking this, it will tell the system to ignore any custom ranking and sorting that you use on your list that is different from how the state supplies the information. This should be checked for each DOF exam.

You will attach the appropriate DOF .CSV file to the exam under the documents tab. This will give you an option to “Import Applicants” just like you do scoring files.

Anybody with a Passing Grade will be added to the system as Approved and with a Status that has the code of ‘A’ under Setup > App.Status. In our case, ‘Active’. The ones with a Failing Grade will be added to the system as Approved and with a Status that has the code of ‘F’ under Setup > App. Status. In our case, “Failed Written Exam”.

All Applicants will be added with a code of “NO CHARGE” so they can be separated out for reporting purposes.

You will establish and update the list however you would normally and the system will handle the rest.

## Exams – Scoring – Bandscore

If you have checked bandscore on the setup of the exam you will find a bandscore sub-tab on the scoring screen. You can fill in the range and score and it will be applied on your written scoring screen.

Range	Score
60.0 - 999.9	100
56.0-59.9	95
52.0-55.9	90
48.0-51.9	85
44.0-47.9	80
40.0-47.9	75
36.0-39.9	70
0.0-35.9	60

- **Range** - The RAW Score Range
- **Score** - The actual score to apply to the raw score

## Exams – Scoring – Phases

If a phase (performance test) is setup for an exam you will find a sub-tab for that test on the scoring tab.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Exam List / Exam 65-745

Master Applications Eligible List List Notes **Scoring** Schedule Attendance Documents Messages Canvass Online Versions

Delete Exam Print List Print Roster Establish Eligible List Export Email Packet New Message New Canvass Clone Exam

Bandscore Written **AGILITY - CPO/PO**

Apply Waivers Export

Show 25 entries Previous 1 2 3 4 5 6 Next Search:

Showing 1 to 25 of 130 entries

SSN	Name	Phase	Score	Date Taken	Time Taken	Result	Note
+	LastName1, FirstName1	AGILITY - CPO/PO	90.0	06/20/2022	08:00am	Pass	2/18/22 AGILITY-DNA
+ -	LastName2, FirstName2	AGILITY - CPO/PO	80.0	06/20/2022	08:00am	Pass	
+ -	LastName3, FirstName3	AGILITY - CPO/PO	85.0	06/20/2022	08:00am	Fail	
+ -	LastName4, FirstName4	AGILITY - CPO/PO	75.0	06/20/2022	08:00am	Pass	
+ -	LastName5, FirstName5	AGILITY - CPO/PO	90.0	06/20/2022	08:00am	Pass	

- **Actions** - Apply waivers (will apply a waiver to those who have recently taken test and passed) and export
- **SSN** - The full social security number of the applicant
- **Name** - The full name for the applicant
- **Phase** - The associated performance test for this applicant. This is setup under the exam master tab.
- **Date Taken** - The date this test was or will be taken.
- **Time Taken** - The time this test was or will be taken
- **Result** - The result of the test. These result codes are setup under Setup > Perf. Codes – these are setup with connection to eligible list status.
- **Note** - A free form note field of informational notes you want to store with this applicant’s performance test

## Exams – Schedule

This tab contains functionality for assigning locations for the exam as well as phases (performance tests). Exam sites can first be setup under Setup > Exam Sites – once that is done then they are available as an exam location.

**Written**

Locations for Written Phase

Exam Location	# to Assign	Date	Remove
Select Options	<input type="text"/>	mm/dd/yyyy, --:-- -- <input type="checkbox"/>	- Remove
Select Options	<input type="text"/>	mm/dd/yyyy, --:-- -- <input type="checkbox"/>	- Remove

+ Add Site

Click Add Site to add an exam site to the exam.

- **Exam Location** - Auto complete field so as you type pre-setup sites will appear and you can select the one you need.
- **# to Assign** - Number of seats available at this site
- **Date** – Date of exam – for continuous recruitment exams that are held at multiple dates
- **Remove** – Remove this site from exam

The screenshot displays the HR Select web application interface. At the top, there is a navigation bar with the HR Select logo and various menu items: Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, and My Jobs. On the right side of the navigation bar, there are links for 'My Account' and 'Log Out'. Below the navigation bar, the breadcrumb trail reads 'Home / Exam List / Exam 000000'. A secondary navigation bar contains tabs for Master, Applications, Eligible List, List Notes, Scoring, Schedule (which is the active tab), Attendance, Documents, Messages, Canvass, Online, and Versions. Below this, there is a toolbar with icons and labels for 'Delete Exam', 'Print List', 'Print Roster', 'Establish Eligible List', 'Export', 'Email Packet', 'New Message', 'New Canvass', and 'Clone Exam'. The main content area is divided into two sections. The first section is titled 'Written' and 'AGILITY PO'. It contains a sub-section 'Locations for Written Phase' with a table that has columns for 'Exam Location', '# to Assign', 'Date', and 'Remove'. Below the table is a '+ Add Site' button. The second section is titled 'Applicants'. It has a sub-section 'Assign Locations' with an 'Export' button. Below this, there is a 'Show 25 entries' dropdown and a search bar. A table lists applicants with columns for 'Status', 'SSN', 'Name', 'Exam Location', and 'Exam Date'. The first entry is 'ACTIVE', 'SCHMIDT, GEOFF', and 'TEST EXAM SITE'. At the bottom of the table, it says 'Showing 1 to 1 of 1 entries' and has 'Previous', '1', and 'Next' navigation buttons.

**Applicants may be assigned automatically or on an individual basis. For an applicant to be available for scheduling they cannot have a status that has the eligible field set to No (under setup>app statuses).**

- **Status** - The status of the applicant
- **SSN** - The full Social Security Number of the applicant
- **Name** - The full Name of the applicant
- **Exam location** - The selection of sites previously assigned to the exam for you to choose from
- **Exam Date** – For continuous recruitment exams (see below)

To allow the system to automatically assign locations click “assign locations” and the system will then assign sites to applicants using capacities and any multiple exam information on file.

If you prefer to manually assign locations click under the exam location and a drop box will offer you any preloaded locations. The exam date field provides a calendar to pick the exam date. Includes an “export” option to download/print a list of applicants with their assigned location.

When assigning exam sites for continuous recruitment exams, you have the option to assign a date and time of the exam to each applicant on the assignments page.

## Exams – Schedule Phases

The schedule tab will also allow you to schedule and assign locations for each exam phases. Each phase will have its own subtab. Exam sites should first be setup under Setup > Exam Sites – once that is done then they are available as an exam location option. **For applicants to be available for scheduling the Eligible list must be established.** Clicking print list will load the applicants for scheduling. You can manually assign locations using the dropdown option under phase site and add a phase date or you can click “assign locations” and the system will do it for you based on the capacity to be seated at each location (# to assign field).

The screenshot displays the 'Schedule' tab for a 'Typing' exam. At the top, there are navigation tabs: Master, Applications, Eligible List, List Notes, Scoring, **Schedule**, Attendance, Documents, Messages, Canvass, Online, and Versions. Below these are utility links: Delete Exam, Print List, Print Roster, Establish Eligible List, Export, Email Packet, New Message, New Canvass, and Clone Exam. The 'Locations for Typing' section contains a table with the following data:

Location	# to Assign	Date	Score Range	Remove
Site Exam Name 1-[ROOM-2222]	20	01/20/2023, 07:52 AM	80 - 100	Remove

Below the locations table is an 'Applicants' section with a table listing one applicant:

SSN	Name	Status	Score	Prv.	Phase Site	Phase Date
	Justofn, Kathleen	ACTIVE	100.0		Site Exam Name 1-[ROOM-2222]	01/20/2023 07:52 AM

## Exams – Attendance

View Attendance record for the exam. Options include: mark all as attended, mark FTA’s (failed to appear) and an export feature. Please note: the system "calculates" FTA based on someone being approved and still having a status which would allow them on the list. Typically it is used after the exam. The FTA's will be set to No.

To mark individual applicants’ attendance or status click in the field and dropdown options will appear.

The screenshot displays the 'Attendance' tab for an exam. At the top, there are navigation tabs: Master, Applications, Eligible List, List Notes, Scoring, Schedule, **Attendance**, Documents, Messages, Canvass, Online, and Versions. Below these are utility links: Delete Exam, Print List, Print Roster, Establish Eligible List, Export, Email Packet, New Message, New Canvass, and Clone Exam. The 'Attendance' section contains a table with the following data:

SSN	Name	Status	Attended	Notes
	SCHMIDT, GEOFF	ACTIVE	No	

The 'Attended' field for the applicant is currently set to 'No', and a dropdown menu is open showing options for 'Yes' and 'No'.

## Exams – Documents

The documents tab allows you to attach documents to this exam. Any number of documents may be attached and categorized on this exam. To upload a document you can drag a file from your desktop into the area marked "Drop files here to upload" or you can use the "Document Upload" link to select a file from your computer to upload.

- **Actions** - Folder icon to view the document and trashcan icon to delete the document
- **Created** - The date the document was attached to this exam
- **Private** - Checking private will ensure that this document is not included when creating email packets of applications or exam information
- **Category** - Documents can be categorized according to type. These categories are defined under Setup > Doc. Cats. Once setup a dropdown under Category will let you select the type you want.
- **Filename** - The filename if the uploaded document

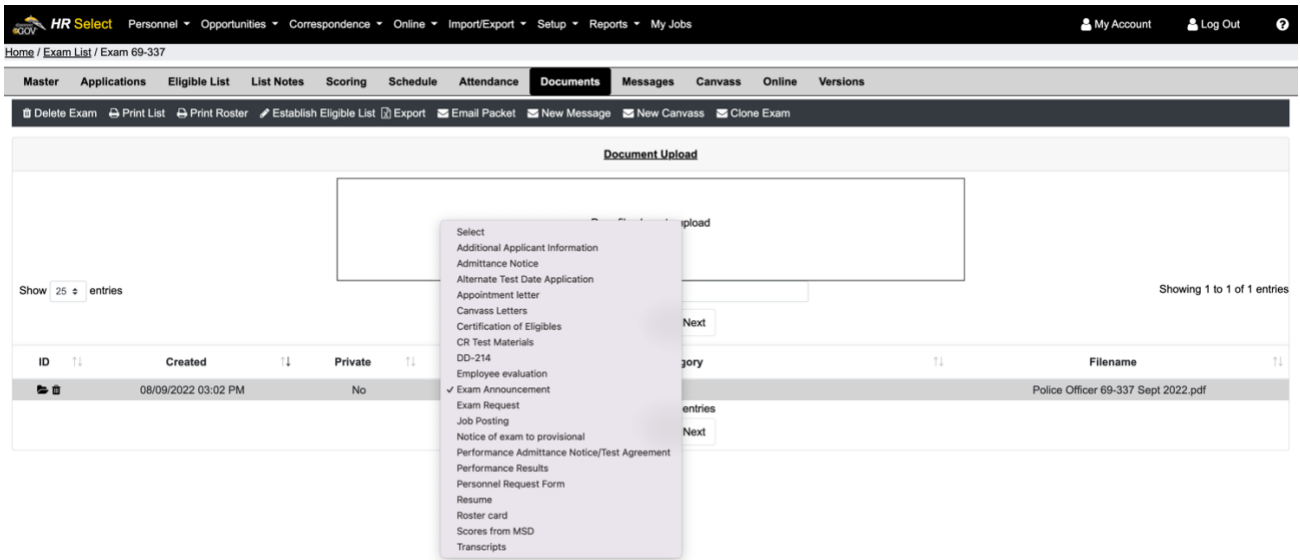
**If you attach a file to the exam that the system recognizes as a scoring file you will have the option to "Import Scores". This will allow you to automatically score this exam based on a scoring file.**

The screenshot displays the HR Select system interface. At the top, there is a navigation menu with options like Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, and My Jobs. Below this is a breadcrumb trail: Home / Exam List / Exam 69-337. The main navigation bar includes Master, Applications, Eligible List, List Notes, Scoring, Schedule, Attendance, Documents (highlighted), Messages, Canvass, Online, and Versions. A toolbar below the navigation bar contains icons for Delete Exam, Print List, Print Roster, Establish Eligible List, Export, Email Packet, New Message, New Canvass, and Clone Exam. The central area is titled "Document Upload" and features a large box with the text "Drop files here to upload" and a small icon of a document labeled "test2.pdf". Below this box is a search field and a "Showing 1 to 1 of 1 entries" indicator. A table below the search field lists the document details:

ID	Created	Private	Category	Filename
	08/09/2022 03:02 PM	No	Exam Announcement	Police Officer 69-337 Sept 2022.pdf

Below the table, there is another "Showing 1 to 1 of 1 entries" indicator and navigation buttons for Previous and Next.

To upload an exam announcement for the online portal, drop the file into the upload box and once it loads select the Exam Announcement category.



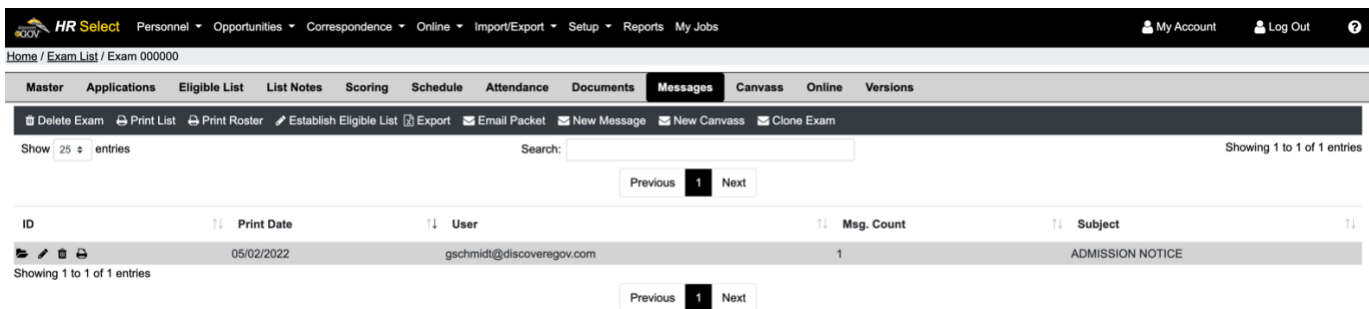
## Exams – Messages

Messages can be created to be emailed or mailed and can be tracked in delivery history.

**Messages can be generated in bulk for each exam.**

- **Actions** - "Folder icon" is used for viewing a previously created batch of messages, "pencil icon" is for editing, "trashcan icon" deletes the message and the "printer icon" prints the messages.
- **Print Date** - The actual print date of the message. This is specified when you create a batch of messages and may not be the current date. For emailed letters, this will be the date the system sends the email. For printed messages, this is the date that will be printed on the message.
- **User** - The user that created the message.
- **Count** - The number of messages in this batch
- **Subject** - The subject line attached to the message

You may initiate a batch of new messages by selecting "New Message" in the dark gray navigation bar. Letters may be deleted using the trashcan icon up until the point they have been "delivered". This is a safeguard mechanism that makes sure any correspondence we have sent to applicants cannot be deleted after they have received it.



## Exams – Creating a New Message

After selecting 'New Message' you are shown the following screen (Advanced filters box is open in screenshot). Whether someone receives a hardcopy, email or both is controlled by the "Contact" field in their applicant record.

The screenshot shows the 'HR Select' interface for creating a message. The title is 'Message creation for Exam 000000-TEST EXAM TYPIST- NOT VALID'. The 'Advanced Filters' section is expanded, showing the following options:

- Agency: Select Options
- Department: Select Options
- Status: Select Options,  Only on Eligible List
- From Score: [ ]
- To Score: [ ]
- Phase: Select Options
- Phase Location: Select Options
- Phase Date/Time Start: mm/dd/yyyy, -- --
- Phase Date/Time End: mm/dd/yyyy, -- --
- Checkboxes:  Only Passing,  Only Failing,  Only Approved,  Only Disapproved,  Only Conditional

Below the filters, a table shows 'Showing 1 to 2 of 2 entries':

Name	Status	Appr	Score	Rank	Pos	Agency	Department
SCHMIDT, GEOFF	ACTIVE	Y	90.0	1	1	CITY	DPW
SCHMIDT, GEOFF	ACTIVE	Y	90.0	1	1	CITY	DPW

Below the table are fields for 'Print Date' (08/12/2022), 'Letter Template' (Please Select, ADMISSION NOTICE), 'Subject', 'CC', and 'Attachment' (Choose file, Browse). A rich text editor is also visible at the bottom.

Advanced Filters may be used to automatically do the selection of applicants for you based on certain criteria. If you would like to select applicants individually you may do so by using the checkbox next to the applicant name in the applicants list.

### Advanced Filters

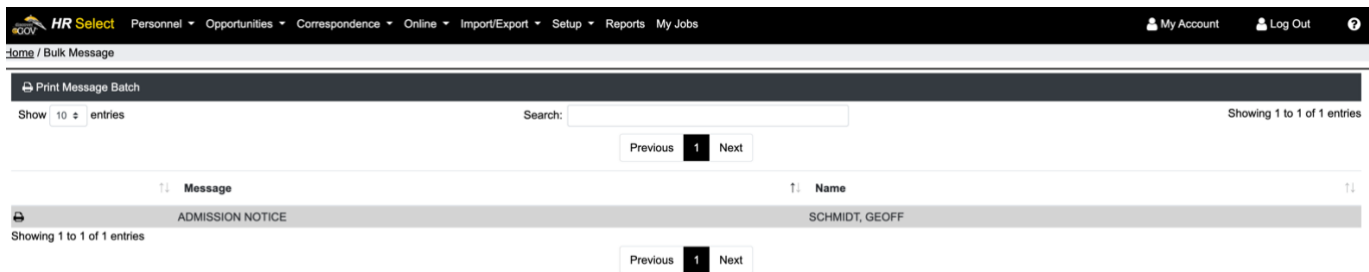
- **Agency** - This will select applicants by the Agency associated with the application
- **Department** - This will select applicants by the Department associated with the application
- **Application Status** - This will select applicants by their current Application Status
- **Checkbox for Only on Eligible List**
- **From and To Score Selection**
- **Checkboxes for: Only Passing, Only Failing, Only Approved, Only Disapproved, Only Conditional**
- **Phase Fields** - Fields to select applicants based on their phase information \*Important – they also populate the phase tokens that may have been used in a message template so you must use these filters if using phase tokens in template.

- **Print Date** - The date you want the messages to be printed or emailed. For printed message, they may be printed before this date however this is the date that will show on the message.
- **Letter Template** - You may select a pre-defined letter template form dropdown as defined under Setup > Message Templates
- **Subject** - The subject line for emailed messages
- **CC** – Carbon copy field
- **Attachments** – Choose file to attach to message if being sent email

After selecting a template, the text editor will populate with the body of the chosen message. You may then make changes for this specific message batch. This will not affect the overall template. Once you have completed all your fields, selecting 'Save Message' at the top will generate your message batch.

## Exams – Viewing an Existing Letter Batch

After selecting the folder icon of an existing letter batch, the following screen appears. All letters are retained in the system indefinitely.



- **Actions** – Print icon to print the specific message
- **Message** - The subject line of the message
- **Name** - The applicant's name
- **Print Message Batch** - Selecting Print Batch at the top will combine all of the letters into a single PDF for ease of printing

## Exams – Canvass

Canvass Letters can be generated in bulk for each exam.

- **Actions** – Folder icon is used for viewing a batch of letters and inputting responses, the pencil icon is for editing the canvass letter, the trashcan icon is for deleting and the print icon is for printing.
- **Print Date** - The actual print date of the letter. This is specified when you create a batch of letters and may not be the current date. For emailed letters, this will be the date the system sends the email. For printed letters, this is the date that will be printed on the letter.
- **Agency/Dept** - The Agency and Department the canvass letter has been created for
- **User** - The user that created the letter
- **Msg. Count** - The number of letters in this batch
- **Subject** - The subject line attached to the letter

You may initiate a batch of new canvass letters by selecting "New Canvass" in the dark gray navigation bar. Canvass Letters may be deleted or edited using the appropriate icon up until the point they have been "delivered". This is a safeguard mechanism that makes sure any correspondence we have sent to applicants cannot be deleted after they have received it.

## Exams – Creating a new Canvass Letter

After selecting 'New Canvass' you are shown the following screen.

The screenshot displays the HR Select system interface. At the top, there is a navigation bar with various menu items like 'Personnel', 'Opportunities', and 'Reports'. Below this, a message creation window is open for 'Exam 000000-TEST EXAM TYPIST- NOT VALID'. The window contains several filter sections: 'Advanced Filters' with fields for Agency, Department, Status, From Score, To Score, Phase, Phase Location, Phase Date/Time Start, and Phase Date/Time End. Below the filters is a table showing two entries for 'SCHMIDT, GEOFF'. The table columns include Name, Status, Appr, Score, Rank, Pos, Agency, and Department. Below the table is a form for creating a canvass, with fields for Print Date, Return Date, Agency, Department, Positions, Job type, Job Time, Salary From, Salary To, Letter Template, Attachment, and Subject. The form also includes a rich text editor for the subject line.

Advanced Selects may be used to automatically do the selection of Applicants based on certain criteria. If you would like to select applicants individually you may do so by using the checkbox next to the applicant's name.

### Advanced Filters

- **Agency** - This will select applicants by the Agency associated with the application
- **Department** - This will select applicants by the Department associated with the application
- **Status** - This will select applicants by their current Application Status
- **From/To Score Selection**
- **Only Passing, Only Approved, Only Conditional, Only Failing, Only Disapproved, Only on Eligible List**
- **Phase fields** – Fields to select applicants based on their phase information

### Canvass Information

- **Print Date** - The date you want the letters to be printed or emailed. For printed letters, they may be printed before this date however this is the date that will show on the letter.
- **Return Date** - The requested return date of the canvass

- **Agency/Department** - The Agency and Department that you are canvassing for
- **Positions** - The number of positions available
- **Job Type** - The type of job such as Permanent, Temporary, etc. These are predefined system variables.
- **Job Time** - Full Time, Part Time, Less than Full Time. These are predefined system variables.
- **Salary** - The salary or salary range associated with this canvass
- **Canvas Questions** – Predefined common questions to add to the canvas – created under Setup > Canv. Questions. Use the setup tab to make custom questions that can be carried thru so you don't continue to canvass someone who has declined for i.e. location or part-time or pay range
- **Letter Template** - You may select a pre-defined letter template as defined under Setup > Letters
- **Subject** - The subject line for emailed letters
- **Attachment** – Attachment file for the canvass

After selecting a template, the editor will populate with the letter body of the chosen letter. You may then make changes for this specific letter batch. This will not affect the overall template. Once you have completed all your fields, selecting 'Save Message' at the top will generate your letter batch.

## Exams – Creating and Viewing Canvass Responses

After selecting the folder icon next to a canvass you are presented with the following screen to view and enter canvass responses.

View	Applicant	Response	List Status
	SCHMIDT, GEOFF	NO TO LOCATION   05/02/2022	ACTIVE
Comment			

- **Actions** – Print icon for printing message, Print Message Batch to print entire batch
- **Applicant** - The Full Name of the Applicant
- **Response** - You may select a response code and enter a date under the Response section. Response codes are defined under Setup > Canv. Codes
- **List Status** - As part of the Canvass Code Setup, you may define a particular Eligible List Status to assign to the applicant based on this particular response code. You may also manually select a status by choosing one from the drop-down.
- **Comment** - Any internal note/comment you want to associate with the canvass response.

## Exams – Online

Online posting information for the exam appearance in the public application portal. Specific fields will import over from the exam master screen into the online tab. Additional online post details can be setup

here. For the exam to appear in the online portal you must have a current publish date, the published checkbox should be checked and any required fields must be filled in.

The screenshot shows the 'HR Select' online portal interface for creating an exam. The top navigation bar includes 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', and 'Reports'. The main menu has 'Master', 'Applications', 'Eligible List', 'List Notes', 'Scoring', 'Schedule', 'Attendance', 'Documents', 'Messages', 'Carvass', 'Online', and 'Versions'. A toolbar contains actions like 'Delete Exam', 'Print List', 'Print Roster', 'Establish Eligible List', 'Export', 'Email Packet', 'New Message', 'New Carvass', and 'Clone Exam'. A 'Save Online Exam Posting' button is visible.

The form fields are as follows:

- Exam No.:** 000000
- Display Name:** TEST EXAM TYPIST- NOT VALID
- Section:** Open Competitive
- Fee:** 15.00
- Categories:** Select Options
- Publish Date:** 02/10/2022, 07:00 AM
- Deadline:** 06/10/2022, 11:59 PM
- Exam Date:** 06/25/2022, 08:00 AM
- Checkboxes:**
  - Published
  - Can Apply
  - Req. Attachment
  - Allow Multiple
  - Require DOB
  - Criminal Questionnaire
  - Ask Citizenship
  - Require License
  - Seasonal
  - Laborer Supplement
- Assessment Information:** Includes a table with columns for Question, Max Score, and Remove.
- Who May Apply:** A rich text editor for defining eligibility criteria.
- Minimum Qualifications:** A rich text editor for defining minimum requirements.

- **Exam Number** – The state assigned exam number
- **Display Name** – The name of the exam
- **Section** – The section of the portal you want the exam to display: open competitive, prom, etc
- **Fee** - The fee to apply
- **Categories** – Tied in to the email notifications listed on your portal – users sign up to get notifications when exams are posted in specific categories – pre-populated options based on original portal setup – select category(s) that exam falls under to alert users of the opportunity
- **Subscribers Notified** – This will check automatically once alert goes out. To send announcement to people who have not received the notification as of yet, uncheck the box – a notice will go out to those who did not receive the first one. If an applicant has been sent the notice they will not get a second one.
- **Publish Date** – The date and time you begin to advertise and accept applications for this exam
- **Deadline** – The last date and time someone can submit an application
- **Exam Date** – The date and time this exam is given
- **Checkboxes**
  - **Published** – Uncheck to remove from Portal – mostly used for manual removal such as continuous recruitment exams

- **Can Apply\*\*** – Check to show apply button, otherwise it will show with no option to apply
- **Req. Attachment** – Check to require applicant to upload attachment
- **Allow Multiple** – Check to allow applicant to apply multiple times
- **Require DOB** – Check to require DOB field
- **Reapply Days** – Enter the amount of days an applicant has to wait to re-apply – used with allow multiple checkbox
- **Criminal Questionnaire** – Check to show criminal questionnaire section (must be previously setup in application)
- **Ask Citizenship** – Check to require citizenship question
- **Require License** – Check to require driver’s license question
- **Seasonal** – Check to show seasonal section (must be previously setup in application)
- **Laborer Supplement** – Check to show laborer supplement (must be previously setup in application)
- **Assessment Information** – Setup assessment questions in the online version and assign a score to each question so when someone is reviewing the application they can use the assessment tab to help them assess if applicant is meeting requirements. Useful when doing non-competitive, score certain parameters for hiring and then use in hiring list similar to eligible list.

Assessment Information		
Question	Max Score	Remove
HAS MINIMUM QUALIFICATIONS	1	<a href="#">Remove This Question</a>
HAS RESIDENCY	1	<a href="#">Remove This Question</a>

[+ Add Assessment](#)

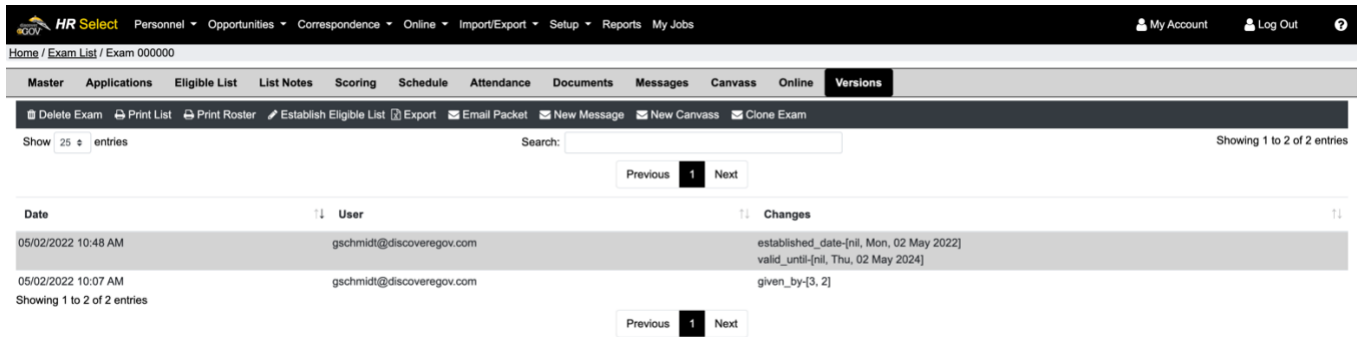
- **Who May Apply** – Instructions for who is eligible to apply for this exam – to display in online portal (must be previously setup in application)
- **Minimum Qualifications** – The minimum qualifications required for candidates to take this exam to appear in a popup before they apply (must be previously setup in application)

Once you have the information loaded in click on “save online exam posting” in upper left corner. Now your exam should appear on the portal as long as the publish date is current. Note: You may work ahead loading exams and use publish dates in the future, then they will not show until that date.

\*\*The “can apply” checkbox will show/hide the apply button, if you want to give them the option to apply it needs to be checked on. The publish online checkbox is NOT used for exams with expiration dates - they display based on publish and deadline date so they fall off automatically. The published checkbox is used for continuous recruitment – you will use either that checkbox or the publish date to manually remove Continuous Recruitment exams you no longer want listed on portal if applicable.

## Exams – Versions

This tab shows a record of all changes that were made to the exam record, the user who made the change and the date of the change.



Home / Exam List / Exam 000000

Master Applications Eligible List List Notes Scoring Schedule Attendance Documents Messages Canvass Online **Versions**

Delete Exam Print List Print Roster Establish Eligible List Export Email Packet New Message New Canvass Clone Exam

Show 25 entries Search: Showing 1 to 2 of 2 entries

Previous 1 Next

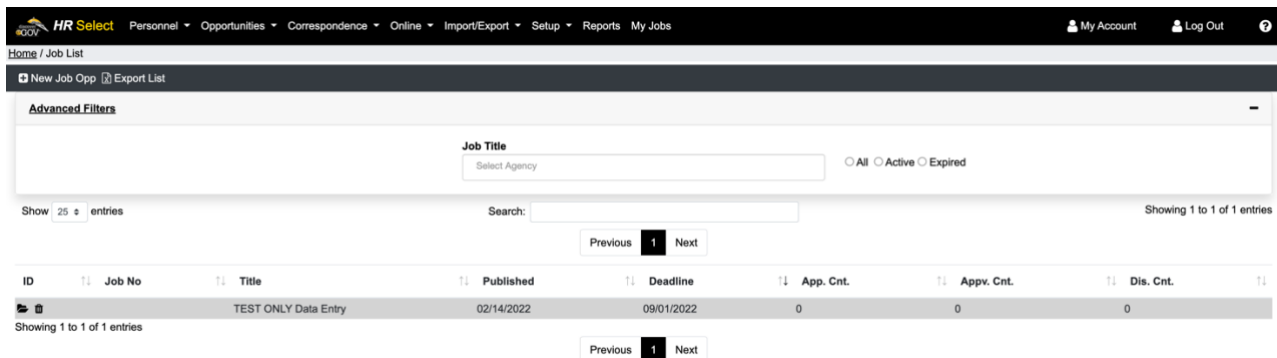
Date	User	Changes
05/02/2022 10:48 AM	gschmidt@discovergov.com	established_date-[nil, Mon, 02 May 2022] valid_until-[nil, Thu, 02 May 2024]
05/02/2022 10:07 AM	gschmidt@discovergov.com	given_by-[3, 2]

Showing 1 to 2 of 2 entries

Previous 1 Next

## Jobs

The jobs module provides a comprehensive list of all job records in the system. The main screen gives you an overview of all jobs. The search feature offers advanced filters for granular searching with job titles and checkboxes for all, active or expired. There are also links in upper left corner for adding a new job opportunity or exporting a list of jobs.



Home / Job List

New Job Opp Export List

Advanced Filters

Job Title  
Select Agency  All  Active  Expired

Show 25 entries Search: Showing 1 to 1 of 1 entries

Previous 1 Next

ID	Job No	Title	Published	Deadline	App. Cnt.	Appx. Cnt.	Dis. Cnt.
		TEST ONLY Data Entry	02/14/2022	09/01/2022	0	0	0

Showing 1 to 1 of 1 entries

Previous 1 Next

- **Action** - Use the folder icon to open an **EXISTING** Exam Record or trashcan to delete a job listing
- **Job No** - The number assigned to the Job
- **Title** - The title of the Exam. This can be the job title or a custom title you assign to the exam
- **Published** - Date the job was published online
- **Deadline** - Last date to apply for the job

- **App Cnt.** - The amount of applications for this job
- **Appv. Cnt.** - The amount of approved applications for this job
- **Dis. Cnt.** - The amount of disapproved applications for this job

## Entering a New Job

To create a new job first click the link “New Job Opp” in the upper right corner. A screen will open for the new job record. Required fields have asterisk.

The screenshot shows the 'New Job Opp' form in the HR Select system. The form is organized into several sections:

- Job Identification:** Job No, Job Title (required), Job Display Name (required).
- Workflow and Settings:** Approval Workflow, Scoring Workflow, Max. Apps., Liasion.
- Administrative Details:** Section, Fee, Publish Date, Deadline.
- Personnel:** Hiring Agency, Hiring Department, Hiring Manager.
- Positioning:** Position to Fill, Categories.
- Options and Checkboxes:**
  - Publish Online
  - Can Apply
  - Req. Attachment
  - Allow Multiple
  - Reapply Days
  - Hiring Score
  - Require License
  - Laborer Supplement
  - Subscribers Notified
  - Seasonal
  - Ask Citizenship
  - Criminal Questionnaire
  - Require DOB

At the bottom of the form is a rich text editor with a toolbar for text formatting and a large text area for additional information.

- **Job No** - Assigned job number
- **Job Title** - The job title for this opportunity
- **Job Display Name** - The display title of the job
- **Approval Workflow** - If workflow is setup then it can be assigned with dropdown option (setup required under setup > workflows)
- **Scoring Workflow** - If workflow is setup then it can be assigned with dropdown option (setup required under setup > workflows)

- **Max Apps** - Amount of applications you would accept for this job
- **Liason** - A dropdown menu of users that you can select from as the liason for this job
- **Section** - The section of the online portal where the job will be displayed
- **Fee** - The cost to apply for job, you may enter 0.00 if there is no fee
- **Publish Date** - The date and time you begin to advertise and accept applications for this job
- **Deadline Date** - The last date and time someone can submit an application
- **Hiring Agency** - The agency which is doing the hiring for the job, setup under setup > agencies
- **Hiring Department** - The department which is doing the hiring for the job, setup under setup > departments
- **Hiring Manager** - The manager who is doing the hiring for the job, dropdown of list of users
- **Position to Fill** -
- **Categories** – Tied in to the email notifications listed on your portal – users sign up to get notifications when exams are posted in specific categories – pre-populated options based on original portal setup – select category(s) that exam falls under to alert users of the opportunity
- **Subscribers Notified** – This will check automatically once alert goes out. To send announcement to people who have not received the notification as of yet, uncheck the box – a notice will go out to those who did not receive the first one. If an applicant has been sent the notice they will not get a second one.
- **Checkboxes**
  - **Publish Online** – Uncheck to remove from Portal – mostly used for manual removal
  - **Can Apply\*\*** – Check to show apply button, otherwise it will show with no option to apply
  - **Req. Attachment** – Check to require applicant to upload attachment
  - **Allow Multiple** – Check to allow applicant to apply multiple times
  - **Reapply Days** – Enter the amount of days an applicant has to wait to re-apply – used with allow multiple checkbox
  - **Hiring Score** – Can be used list a hiring score for the job
  - **Require DOB** – Check to require DOB field
  - **Criminal Questionnaire** – Check to show criminal questionnaire section (must be previously setup in application)
  - **Ask Citizenship** – Check to require citizenship question
  - **Require License** – Check to require driver’s license question
  - **Seasonal** – Check to show seasonal section (must be previously setup in application)

- **Laborer Supplement** – Check to show laborer supplement (must be previously setup in application)
- **Editor Field** – Enter any pertinent job information you may want to show on the portal (min requirements, residency requirements, etc.) - must be setup previously to have it display on portal.
- **Notes** – Any internal notes on the job opportunity

## Viewing/Editing Existing Jobs – Master Tab

To view/edit an existing job click on the folder icon next to the exam you want to open. This will open a screen with the details of that exam record. Once you edit the job click save job button in upper left.

The screenshot shows the 'Master' tab interface for editing a job record. The top navigation bar includes 'HR Select' and various menu items like 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. Below the navigation, there are tabs for 'Master', 'Job Desc.', 'Assessment', 'Applicants', 'Hiring List', 'Documents', and 'Messages'. A toolbar contains actions like 'Delete Job', 'Print List', 'New Message', 'Export', 'Email Packet', and 'Save Job'. The main form area is divided into several sections: 'Job No.', 'Job Title\*' (with a dropdown showing 'DATA ENTRY CLERK'), 'Job Display Name\*' (with a dropdown showing 'TEST ONLY Data Entry'), 'Approval Workflow', 'Scoring Workflow', 'Max. Apps.', 'Liaison', 'Section', 'Fee\*' (0.00), 'Publish Date\*' (02/14/2022, 07:00 AM), 'Deadline' (09/01/2022, 11:59 PM), 'Hiring Agency', 'Hiring Department', 'Hiring Manager', 'Position to Fill', 'Categories', and a 'Subscribers Notified' checkbox. At the bottom, there are several checkboxes for application options: 'Publish Online', 'Can Apply', 'Req. Attachment', 'Allow Multiple', 'Reapply Days', 'Hiring Score', 'Require DOB', 'Criminal Questionnaire', 'Ask Citizenship', 'Require License', 'Seasonal', and 'Laborer Supplement'. A rich text editor is visible at the bottom of the form.

## Menu Bar

**Delete Job** - This will delete this job record. Jobs with applicants will not be able to be deleted without all associated information being deleted first.

**Print List** - Print the list of applicants for this job

**New Message** – Create a message associated with this job (viewable under messages tab)

**Export** – Creates an export of the Exam information and associated applicant information

**Email Packet** - Email the Application packet via a secure link – fields/checkboxes for specific application selections.

### Email Application Packet

x

Please enter the email address or email addresses below that you would like this information to be emailed to. The recipient(s) will receive a secure link to view this email. Please separate multiple recipients with a comma.

Email Address:

Include Documents

Approved Only

App Date Range

mm/dd/yyyy to mm/dd/yyyy

Status: Select Status

Send Email

## Jobs – Job Desc. Tab

This tab offers a text editor where you can type in the job description and have it appear on the portal.

The screenshot displays the HR Select web application interface. At the top, there is a navigation bar with the HR Select logo and various menu items: Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, and My Jobs. On the right side of the navigation bar, there are links for My Account and Log Out. Below the navigation bar, there is a breadcrumb trail: Home / Job List. The main content area has a tabbed interface with the following tabs: Master, Job Desc. (selected), Assessment, Applicants, Hiring List, Documents, and Messages. Below the tabs, there is a toolbar with several icons: Delete Job, Print List, New Message, Export, and Email Packet. A Save Job button is located at the bottom left of the toolbar. The main content area is a large text editor with a rich text toolbar at the top. The toolbar includes options for Source, Styles, Normal, Font, Size, Bold, Italic, Underline, Strikethrough, Insert placeholder, and a list of icons for text alignment, bulleted list, numbered list, link, unlink, and table. The text editor area is currently empty, with the placeholder text "Description of job in detail" visible at the top left.

## Jobs – Assessment Tab

Setup assessment questions and assign a score to each question so when someone is reviewing the application they can use the assessment tab to help them assess if applicant is meeting requirements. Useful when doing non-competitive, score certain parameters for hiring and then use in hiring list similar to eligible list.

The screenshot shows the HR Select Assessment Tab interface. At the top, there is a navigation bar with 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. Below this is a breadcrumb trail 'Home / Job List'. The main navigation tabs include 'Master', 'Job Desc.', 'Assessment' (which is selected), 'Applicants', 'Hiring List', 'Documents', and 'Messages'. A toolbar contains icons for 'Delete Job', 'Print List', 'New Message', 'Export', and 'Email Packet'. Below the toolbar is a 'Save Job' button. The main content area has two rows of assessment questions. The first row is 'HAS MINIMUM QUALIFICATIONS' with a 'Max Score' of 1 and a 'Remove' button. The second row is 'HAS RESIDENCY' with a 'Max Score' of 1 and a 'Remove' button. At the bottom left, there is a '+ Add Assessment' button.

- **Action** – Use “+ Add Assessment” option to add assessment question(s)

## Jobs – Applicants Tab

A complete list of applicants for the job. You can search for specific applicants in the search box using SSN, Name, etc. For additional applicant screen information please see “applicant” section.

The screenshot shows the HR Select Applicants Tab interface. At the top, there is a navigation bar with 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. Below this is a breadcrumb trail 'Home / Job List'. The main navigation tabs include 'Master', 'Job Desc.', 'Assessment', 'Applicants' (which is selected), 'Hiring List', 'Documents', and 'Messages'. A toolbar contains icons for 'Delete Job', 'Print List', 'New Message', 'Export', and 'Email Packet'. Below the toolbar is a 'Save Job' button. The main content area shows a search box and a table of applicants. The table has columns for 'ID', 'Submitted', 'App.', 'Status', 'SSN', 'Name', 'Eval Score', 'Agency', and 'Department'. The table shows 7 entries. Below the table, there is a 'Showing 1 to 7 of 7 entries' message and a pagination control with 'Previous', '1', and 'Next' buttons.

ID	Submitted	App.	Status	SSN	Name	Eval Score	Agency	Department
	07/25/2022 07:08 pm	N				0	OC	DPW
	08/11/2022 03:05 pm	N				0	OC	DPW
	08/04/2022 10:36 pm	Y				3	OC	DPW
	07/07/2022 01:12 pm	Y				2	OC	DPW
	07/11/2022 08:13 pm	Y				1	OC	DPW
	07/08/2022 12:17 pm	N				0	OC	DPW
	08/05/2022 11:42 pm	Y				3	OC	DPW

- **Action** - The folder icon will open the master applicant screen for that applicant

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Applications List / Application for SCHMIDT, GEOFF J

Master Assessment Documents(0) Messages(0) Web Attach(0) Online Response Versions

New Message Delete Application

Save Only Save & Exit

Application Date: 04/28/2022, 10:25:23 AM Application Type: Non Competitive Job Opportunity Name: TEST ONLY Data Entry

Applicant Search: [SCHMIDT, GEOFF J]

**Applicant Info**

Social Security Number: [ ] State Person ID: [ ] No Apps Allowed:  No App Reason: [ ]

First Name: GEOFF MI/Name: J Last Name: SCHMIDT

Home Phone: [ ] Work Phone: [ ] Cell Phone: [ ] License State: [ ] License Number: [ ]

Email: [ ] Birth Date: mm/dd/yyyy Gender: [ ] EEO Race: [ ] Contact: [ ]

CIQ On File:  CIQ Date: mm/dd/yyyy Transcripts On File:  Transcripts Date: mm/dd/yyyy Transcripts Comments: [ ]

**Veteran Info**

Veteran: [ ] From Date: mm/dd/yyyy To Date: mm/dd/yyyy Credits Used:

**Mailing Address**

Address: [ ]

## Jobs – Hiring List Tab

Create a hiring list based on evaluation score.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Job List

Master Job Desc. Assessment Applicants Hiring List Documents Messages

Delete Job Print List New Message Export Email Packet

Save Job

ID	Status	SSN	Name	Eval Score
	Active	[REDACTED]	Schmidt, Geoff J	4

## Jobs – Documents

The documents tab allows you to attach documents to this job. Any number of documents may be attached and categorized for this job. To upload a document you can drag a file from your desktop into the area marked "Drop files here to upload" or you can use the "Document Upload" link to select a file from your computer to upload.

The screenshot shows the HR Select interface for the Documents section. At the top, there is a navigation bar with 'HR Select' and various menu items like Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, and My Jobs. Below this is a breadcrumb trail 'Home / Job List' and a sub-menu with 'Master', 'Job Desc.', 'Assessment', 'Applicants', 'Hiring List', 'Documents', and 'Messages'. A toolbar contains icons for 'Delete Job', 'Print List', 'New Message', 'Export', and 'Email Packet', along with a 'Save Job' button. The main content area is titled 'Document Upload' and features a large box with the text 'Drop files here to upload'. Below this is a search bar and pagination controls showing 'Showing 1 to 1 of 1 entries'. A table lists the document with the following columns: ID, Created, Private, Category, and Filename. The table contains one entry: ID (with a folder icon), Created (07/20/2022 11:46 AM), Private (No), Category (Exam Announcement), and Filename (test-announcement.pdf). Below the table, there are more search and pagination controls.

- **Actions** - Folder icon to view the document and the trashcan icon to delete the document
- **Created** - The date the document was attached to this job
- **Private** - Checking private will ensure that this document is not included when creating email packets of applications or job information
- **Category** - Documents can be categorized according to type. These categories are defined under Setup > Doc. Cats. Once setup a dropdown under Category will let you select the type you want.
- **Filename** - The filename of the uploaded document

## Jobs – Messages

Messages can be created to be emailed or mailed and can be tracked in delivery history. Messages can be generated in bulk for each job.

The screenshot shows the HR Select interface for the Messages section. The navigation bar and breadcrumb trail are the same as in the previous screenshot. The sub-menu now highlights 'Messages'. The toolbar contains icons for 'Delete Job', 'Print List', 'New Message', 'Export', and 'Email Packet', along with a 'Save Job' button. The main content area shows a search bar and pagination controls indicating 'Showing 0 to 0 of 0 entries'. Below this is a table with columns: ID, Print Date, User, Msg. Count, and Subject. The table contains one entry: ID (with folder, printer, and trashcan icons), Print Date (05/02/2022), User (gschmidt@discovergov.com), Msg. Count (1), and Subject (ADDITIONAL INFORMATION REQUEST). Below the table, there are search and pagination controls.

- **Actions** - "Folder icon" is used for viewing a previously created batch of messages, "pencil icon" is for editing, "trashcan icon" deletes the message and the "printer icon" prints the messages.

- **Print Date** - The actual print date of the message. This is specified when you create a batch of messages and may not be the current date. For emailed letters, this will be the date the system sends the email. For printed messages, this is the date that will be printed on the message.
- **User** - The user that created the message.
- **Msg. Count** - The number of messages in this batch
- **Subject** - The subject line attached to the message

You may initiate a batch of new messages by selecting "New Message" in the dark gray navigation bar. Letters may be deleted using the trashcan icon up until the point they have been "delivered". This is a safeguard mechanism that makes sure any correspondence we have sent to applicants cannot be deleted after they have received it.

## Jobs – Creating a New Message

After selecting 'New Message' you are shown the following screen (Advanced filters box is open in screenshot).

The screenshot displays the 'New Message' creation interface in HR Select. At the top, the navigation bar includes 'Home / New Message' and a 'Save Message' button. The main heading is 'Message creation for Job TEST ONLY Data Entry'. An 'Advanced Filters' box is open, showing filters for Agency, Department, Status (with an 'Only on Eligible List' checkbox), From Score, and To Score (with checkboxes for Only Passing, Only Approved, Only Conditional, Only Failing, and Only Disapproved). Below the filters, a table lists 12 entries with columns for Name, Status, Appv, Score, Rank, Pos, Agency, and Department. At the bottom, there are fields for Print Date (08/23/2022), Letter Template (Please Select), Subject, CC, and Attachment (Choose file). A rich text editor is at the very bottom.

Advanced Filters may be used to automatically do the selection of Applicants for you based on certain criteria. If you would like to select applicants individually you may do so by using the checkbox next to the Applicant Name in the Applicants list.

### Advanced Filters

- **Agency** - This will select applicants by the Agency associated with the application
- **Department** - This will select applicants by the Department associated with the application
- **Application Status** - This will select applicants by their current Application Status
- **Checkbox for Only on Eligible List**
- **From and To Score Selection**
- **Checkboxes for: Only Passing, Only Failing, Only Approved, Only Disapproved, Only Conditional**
- **Print Date** - The date you want the messages to be printed or emailed. For printed message, they may be printed before this date however this is the date that will show on the message.
- **Letter Template** - You may select a pre-defined letter template form dropdown as defined under Setup > Message Templates
- **Subject** - The subject line for emailed messages
- **CC** – Carbon copy field
- **Attachment** – if you are attaching any documents to be sent with email

After selecting a template, the text editor will populate with the letter body of the chosen letter. You may then make changes for this specific letter batch. This will not affect the overall template. Once you have completed all your fields, selecting 'Save Message' at the top will generate your letter batch.

## Applicants

When using the applicants tab, you will be given a complete list of Civil Service Applicants. Searching can be accomplished using the free form search box. As you began to type a last name, social security number, etc in the search box suggestions will be made.

ID	SSN(4)	State ID	Name	Address	City	State	Zip	Email	App Cnt.
			GUDICH, KATHY	123 MAIN ST	PITTSFORD	NY	11111	KATHYG@CATALOGANDCOMMERCE.COM	4
			SCHMIDT, GEOFF J	123 ANY STREET	ANYCITY	NY	00001	GSCHMIDT@DISCOVEREGOV.COM	3

- **Action** - Folder icon will open the application approval and scoring window for this particular application, the “New Applicant” option in upper left will open a new applicant screen
- **SSN** - The last four of the social security number of the applicant

- **Name** - The last name, first name of the applicant
- **Address** - The address of the applicant
- **City** - The city of the applicant
- **State** - The state of the applicant
- **Zip** - The zip of the applicant
- **Email** - The email of the applicant
- **App Cnt.** - The amount of applications the applicant has submitted

## Applicants – Creating a New Applicant

Clicking “New Applicant” under the main applicant screen will take you to the applicant entry screen shown below. There are three areas where you can add an applicant, from the main applicant screen, from the add new application screen on the exam tab and also from the application tab.

The screenshot shows the 'New Applicant' form in the HR Select system. The form is organized into several distinct sections:

- Personal Information:** Includes fields for Social Security Number, State Person ID, First Name, MI/Name, Last Name, Home Phone, Work Phone, Cell Phone, License State, License Number, Birth Date, Gender, EEO Race, and Contact (Postal, CIQ Date).
- Demographics:** Includes checkboxes for Citizen, Conviction, Vol FF, Sabbath Observer, and CIQ On File.
- Veteran Info:** Includes fields for Veteran status, From Date, To Date, and Credits Used.
- Section 85:** Includes Approval Agency (Please select), Approval Date, Credit Used, and Notes.
- Mailing Address:** Includes Address, Address2, City, State, Zip, and an Undeliverable Mail checkbox.
- Residential Address:** Includes Address, City, State, Zip, County, City/Village, Town, and School (Please Select).
- Comments:** A large text area for additional information.
- Special Accommodations:** A text area for special needs.
- User Fields:** A section for user-defined fields.

- **SSN** - The Social Security Number of the Applicant. You will not be able to create multiple applicant records with the same social security number. If you do not enter a Social Security Number, the system will generate a temporary identification number for you when you save applicant
- **State Person ID** – State ID number
- **No Apps Allowed checkbox** – If checked the applicant will not be able to submit an application
- **No App Reason** – Detailed reason no application is allowed, for instance “continually bounces checks”
- **First Name, MI (Middle Initial), Last Name**
- **Home Phone, Work Phone, Cell Phone**
- **License State** – Applicant’s driver’s license state
- **License Number** – Driver’s license number
- **Email** - Email address
- **Birth date** - Calendar popup to enter date of birth
- **Gender** - Dropdown options for gender selects
- **EEO Race** - The EEO Race of the Applicant. For more information on EEO Race, please refer to <http://eeoc.gov>
- **Contact** - An applicant may be set to be sent correspondence in 1 of 3 ways. Email, Postal or Both. When choosing Email, a hardcopy letter will not be generated for this applicant and they will receive email only. When choosing Postal, ONLY a hard copy letter will be generated. When choosing Both, both an email and hardcopy letter are generated.
- **Checkboxes:**
  - **Citizen** – Denotes citizenship
  - **Conviction** – Denotes a conviction
  - **Vol FF** – Denotes a volunteer firefighter
  - **Sabbath Observer** – Denotes a Sabbath Observer
  - **CIQ on File** – if a Criminal Information Questionnaire is on file
  - **CIQ Date** – Criminal Information Questionnaire Date
  - **Transcripts on File** – If applicant has submitted transcripts
  - **Transcripts Date** – Date applicant submitted transcript
  - **Transcripts Comment** – Any comments regarding transcripts
- **Veteran Info**
  - **Veteran Field** - Dropdown options of: UNKNOWN, NON-VET, VETERAN, DISABLED VET, NEED FORMS, ACTIVE DUTY, SPOUSE, CONDITIONAL, DENIED
  - **From Date** – Veteran from date
  - **To Date** – Veteran to date
  - **Credits Used** – Checkbox to denote if credits have been used
- **Section 85**
  - **Approval Agency** - Dropdown options for agencies
  - **Approval Date** – Date of approval
  - **Credit Used** – Checkbox to denote if credits have been used
  - **Notes** – Notes field
- **Mailing Address** - The current mailing address of the applicant, checkbox for undeliverable mail, if mail has been returned undeliverable

- **Residential Residence** - If the applicant has a different legal residence than their mailing address, select 'Check Here is the Legal Residence....' and fill out the address information for their legal residence. If this information is the same, you may leave it blank.
- **County, Town, City/Village, School** - These are predefined selections under setup to track the current LEGAL residency of the applicant
- **Comments** - Notes that you may want to store with this applicant
- **Special Accommodations** – Any special accommodations this applicant requires

After all required fields have been entered you can hit 'Save Applicant' to create the record.

## Viewing/Editing Existing Applicants - Master Tab

Clicking the folder icon next to an applicant will open their applicant record. After making modifications to applicant you then click “Save Applicant” to retain changes. Any updates that are made will be tracked on the Versions tab.

The screenshot shows the 'HR Select' web application interface. At the top, there is a navigation bar with 'Home / Applicants List / Applicant SCHMIDT, GEOFF'. Below this is a sub-menu with 'Master', 'History', 'Documents', 'Messages(2)', 'Perf Tests', 'Tracking', and 'Versions'. The 'Master' tab is active, showing a 'Save Applicant' button. The main form area is divided into several sections:

- Personal Information:** Social Security Number, State Person ID, No Apps Allowed (checkbox), No App Reason, First Name (GEOFF), MI/Name (J), Last Name (SCHMIDT), Home Phone, Work Phone, Cell Phone, License State (New York), License Number, Email (gachmidt@discovergov.com), Birth Date (01/01/1980), Gender (Male), EEO Race, Contact (Email), Citizen (checkbox), Conviction (checkbox), Vol FF (checkbox), Sabbath Observer (checkbox), CIQ On File (checkbox), CIQ Date (mm/dd/yyyy), Transcripts On File (checkbox), Transcripts Date (mm/dd/yyyy), Transcripts Comments.
- Current Employment Information:** Agency (NONE), Department (NONE), Class, Status.
- Veteran Info:** Veteran (VETERAN), From Date (mm/dd/yyyy), To Date (mm/dd/yyyy), Credits Used (checkbox).
- Section 85:** Approval Agency (Please select), Approval Date (mm/dd/yyyy), Credit Used (checkbox), Notes.

## Menu Bar

**New Application** – Starts a new application for that applicant – pre-populating the applicant’s information into the new application

**New Message** – Creates a new message to the applicant (viewed under message tab)

**Delete Applicant** – Deletes the applicant

## Applicants – History Tab

The history tab provides a comprehensive overview of each of the applicant’s applications, eligible lists, certifications and performance tests. Each section is an accordion view which can be opened for display and then closed. The search allows you to search that specific section.

The screenshot displays the HR Select interface for the History tab of Applicant SCHMIDT, GEOFF. The page is organized into four main sections, each with a search bar and a table of records.

**Applications Section:** Shows 2 of 2 entries. The table has columns: ID, Submitted, App. Type, Status, Exam Date, No, Title, Online, Appv., Agency, and Dept. The entries are:

ID	Submitted	App. Type	Status	Exam Date	No	Title	Online	Appv.	Agency	Dept
05/02/2022	05/02/2022	EXAM	ACTIVE	06/25/2022	000000	TEST EXAM TYPIST- NOT VALID	N	Y	CITY	DPW
04/28/2022	04/28/2022	EXAM		06/25/2022	000000	TEST EXAM TYPIST- NOT VALID	N	Y		

**Eligible Lists Section:** Shows 1 of 1 entries. The table has columns: List Date, Exam, Exam Title, Orig Pos., Cur Pos., Rank, Status, Base Score, Vet Credits, Sen Credits, and Final Score. The entry is:

List Date	Exam	Exam Title	Orig Pos.	Cur Pos.	Rank	Status	Base Score	Vet Credits	Sen Credits	Final Score
05/02/2022	000000	TEST EXAM TYPIST- NOT VALID	1	1	1	ACTIVE	90.0			90.0

**Certifications Section:** Shows 1 of 1 entries. The table has columns: ID, Cert Date, Agency, Dept, Exam, Exam Title, Action, and Sec85. The entry is:

ID	Cert Date	Agency	Dept	Exam	Exam Title	Action	Sec85
	05/10/2022	CITY	DPW	000000	TEST EXAM TYPIST- NOT VALID	APPOINTED	N

**Performance Tests Section:** Shows 0 of 0 entries. The table has columns: ID, Status, Taken, Test, and Exam. The message "No data available in table" is displayed.

- **Actions** – The folder icon will open a record for review and/or editing.

## Applications

This section contains a summary of all applications entered for this applicant. It includes the submitted date, app type, eligible list status, exam date, exam number, exam title, if it was an online application, whether the application is approved or not, and the agency and the department associated with the exam. If the application

is for a non-competitive title, the word JOB TITLE will appear in the exam column. Clicking on the folder icon next to the application will open up that specific application.

### Eligible Lists

This section contains a summary of all eligible lists associated with the applicant. It includes list date, exam number, exam title, original position, current position, rank, status, base score, any additional credits and final score.

### Certifications

This section contains a summary of all certifications this applicant has appeared on. It includes the certification date, agency and department, exam number and exam title, certification action and sec 85 information. Clicking on the folder icon next to the certification will open up that specific certification.

### Performance Tests

This section contains a summary of all performance tests this applicant has taken and the associated exam if applicable. It provides the test status, if it was taken, the test name and the exam it is for.

## Applicants – Documents Tab

The applicant documents tab has two sections. The first section is a document upload area for admins to attach documents to this applicant. Any number of documents may be attached and categorized for this person. To upload a document you can drag a file from your desktop into the area marked "Drop files here to upload" or you can use the "Document Upload" link to select a file from your computer to upload.

The second section "Web Attachments" will list all documents the applicant uploads via the online application portal such as transcripts, copy of license, etc.

The screenshot shows the HR Select interface for the 'Documents' tab of applicant SCHMIDT, GEOFF. The page is divided into two main sections: 'Document Upload' and 'Web Attachments'.

**Document Upload Section:**

- Header: Document Upload
- Upload area: A large box with the text "Drop files here to upload".
- Table: A table with columns: ID, Created, Private, Category, and Filename. It shows one entry: "alltestdaterequest.pdf" created on 08/09/2022 03:02 PM, with Category "Alternate Test Date Application".

**Web Attachments Section:**

- Header: Web Attachments
- Table: A table with columns: ID, Created, Private, and Filename. It shows one entry: "2018-transcript.pdf" created on 08/12/2022 10:00 AM.

- **Actions** – The folder icon will open a document record for review, the trashcan will delete the document

## Applicants – Messages

Messages can be created to be emailed or mailed and can be tracked in delivery history. The tab shows how many messages the applicant has (in the screenshot there is a (2) to state there are two messages).

**Messages can be generated individually for an applicant.**

ID	Created	Updated	Print Date	User	Subject
	05/02/2022 10:51 AM	05/10/2022 10:32 AM	05/02/2022	gschmidt@discoveregov.com	ADMISSION NOTICE
	05/02/2022 10:41 AM	05/02/2022 10:41 AM	05/02/2022	gschmidt@discoveregov.com	ADMISSION NOTICE

- **Actions** - Folder icon is used for viewing a message, trashcan icon deletes the message and the printer icon prints the messages.
- **Created** - The date the message was created
- **Updated** - The date a message was update if applicable
- **Print Date** - The actual print date of the message. This is specified when you create a batch of messages and may not be the current date. For emailed letters, this will be the date the system sends the email. For printed messages, this is the date that will be printed on the message.
- **User** - The user that created the message.
- **Subject** - The subject line attached to the message

You create a new message by selecting "New Message" in the dark gray navigation bar.

Messages may be deleted using the trashcan icon up until the point they have been "delivered". This is a safeguard mechanism that makes sure any correspondence we have sent to applicants cannot be deleted after they have received it.

## Applicants – Creating a New Message

After selecting 'New Message' you are shown the following screen – it is a basic message screen since it is only being sent to that specific applicant. Whether someone receives a hardcopy, email or both is controlled by the "Contact" field in their applicant record.

- **Print Date** - The date you want the messages to be printed or emailed. For printed message, they may be printed before this date however this is the date that will show on the message.
- **Letter Template** - You may select a pre-defined letter template form dropdown as defined under Setup > Message Templates
- **Subject** - The subject line for emailed messages
- **BCC** – Blind carbon copy field
- **Attachments** – Choose file to attach to message if being sent email

After selecting a template, the text editor will populate with the message body of the chosen letter. You may then make changes for this specific message. This will not affect the overall template. Once you have completed all your fields, selecting 'Save Message' at the top will generate your message.

## Applicants – Perf. Tests Tab

The Perf. Tests tab under an applicant is used for "stand-alone" performance tests. These are not attached to an exam but are given separate from the exam and attached to the applicant only. The results of these may be used to satisfy a required performance test associated with an exam.

- **Actions** - “Add Test” option provides new test fields
- **Performance Test** – The name of the test with a dropdown of options previously created under Setup > Perf. Tests

- **Form** – The test form, for example A or B
- **Result** – The result of the test with a dropdown of options previously created under Setup > Perf. Codes
- **Date** - The date and time of the test
- **Remove** - Removes the test from the applicant

## Applicants – Tracking Tab

The Tracking Tab offers very detailed information on the interaction of an applicant with any email correspondence sent to them. It tracks delivery and opening of emails at the specific message level.

The screenshot shows the HR Select interface for the Tracking Tab. At the top, there are navigation tabs: Master, History, Documents, Messages(7), Perf Tests, Tracking (selected), and Versions. Below the tabs, there are buttons for 'New Application', 'New Message', and 'Delete Applicant'. A search bar is present with the text 'Showing 1 to 25 of 111 entries'. A pagination control shows 'Previous', '1' (selected), '2', '3', '4', '5', and 'Next'. The main table has columns for ID, Date, Event, Exam, Email, and Subject. Three rows of data are visible, all dated 08/04/2022 and related to 'APP (COMPETITIVE) APPROVED'.

ID	Date	Event	Exam	Email	Subject
	08/04/2022 02:16 PM	open	[60-084][OC]COUNTY POLICE OFFICER / POLICE OFFICER	GSCHMIDT@DISCOVEREGOV.COM	APP (COMPETITIVE) APPROVED
	08/04/2022 12:01 PM	delivered	[60-084][OC]COUNTY POLICE OFFICER / POLICE OFFICER	GSCHMIDT@DISCOVEREGOV.COM	APP (COMPETITIVE) APPROVED
	08/04/2022 12:01 PM	processed	[60-084][OC]COUNTY POLICE OFFICER / POLICE OFFICER	GSCHMIDT@DISCOVEREGOV.COM	APP (COMPETITIVE) APPROVED

- **Actions** – The print icon next to the listing will allow you to print the actual correspondence that was sent
- **Date** - The date the interaction occurred
- **Event**
  - **processed** - This was processed by the system to be delivered
  - **delivered** - This was successfully delivered to the recipient
  - **click** - The recipient clicked on the link in the email
  - **open** - The recipient opened the email
  - **bounce** - The email could not be delivered and was "bounced"
  - **deferred** - Delivery has been deferred
- **Exam** - The exam name associated with the message
- **Email** - The email of the recipient
- **Subject** - The subject of the message

## Applicants – Versions Tab

The versions tab tracks EVERY change made to an applicant record and includes the date and time of the change and the user that made it. It also includes the old and new value of the field.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Applicants List / Applicant SCHMIDT, GEOFF

Master History Documents Messages(2) Perf Tests Tracking **Versions**

New Application New Message Delete Applicant

Show 25 entries Search: Showing 1 to 2 of 2 entries

Date	User	Changes
05/02/2022 10:29 AM	gschmidt@discoveregov.com	veteran-["", "VETERAN"]
04/28/2022 10:58 AM	gschmidt@discoveregov.com	mi-["", "J"] citizen-[nil, false] conviction-[nil, false] exempt_vol_ff-[nil, false] sec85_used-[nil, false] sec85_notes-[nil, ""]

Showing 1 to 2 of 2 entries

## Applications

A complete list of all application records in HR Select. Searching can be accomplished using the free form search box. As you began to type a last name, social security number, etc in the search box suggestions will be made. You may search by SSN, Name, Job Title, Exam Number, etc. Advanced filters provide more granular search options to narrow down results.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Applications List

New Application Export List

**Advanced Filters**

Agency: Select Options  
 Department: Select Options  
 Job Title: Select Options

Only Approved  Waiting Approval

App From: mm/dd/yyyy to mm/dd/yyyy  
 Exam From: mm/dd/yyyy to mm/dd/yyyy

Reset Filters

Show 25 entries Search: Showing 1 to 2 of 2 entries

ID	Submitted	App. Type	Status	No	Title	Online	Appv.	SSN(4)	Name	Agency	Dept
	05/02/2022	EXAM	ACTIVE	000000	TEST EXAM TYPIST- NOT VALID	N	Y		SCHMIDT, GEOFF J	CITY	DPW
	04/28/2022	EXAM		000000	TEST EXAM TYPIST- NOT VALID	N	Y		SCHMIDT, GEOFF J		

Showing 1 to 2 of 2 entries

- **Actions** – The folder icon will open an application for viewing or editing and the trashcan icon will delete an application
- **New Application** - Clicking the “New Application” option will create a new application form and allow you to add an application to the system
- **Export List** - The export button will export an Excel Workbook of the applications that are currently selected according to your search
- **Submitted** – The date the application was submitted
- **App. Type** – The type of application: exam, job opening, etc.
- **Status** – The status of the applicant
- **No** – The exam number for the application

- **Title** – The title of the exam or job
- **Online** – If the application was done online
- **Approved** – If the application has been approved
- **SSN(4)** – Last four digits of applicant’s social security number
- **Name** – The full name of the applicant
- **Agency** – The agency associated with the exam/job
- **Department** – The department associated with the exam/job

## Applications - Creating a New Application

To add a new application click on “New Application” in upper left and a new application screen will open. When adding in this area only the date will pre-populate. Once you choose what type of application you are adding, such as exam or job opportunity then the name field will appear.

You can use the applicant search to find individuals, however if that person has never been loaded into the system you will just go about entering their information in the application and an applicant file will be created.

You will have one applicant record per social security number. If you try to add a duplicate social you will not be able to save it – an error will alert you that number is already used.

The screenshot shows the HR Select application form. At the top, there is a navigation bar with 'HR Select' and various menu items like 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. Below the navigation bar, there are buttons for 'Save Only' and 'Save & Exit'. The form is divided into several sections:

- Applicant Info:** Includes fields for Social Security Number, State Person ID, No Apps Allowed (checkbox), No App Reason, First Name, MI/Name, Last Name, Home Phone, Work Phone, Cell Phone, License State, License Number, Email, Birth Date (mm/dd/yyyy), Gender, EEO Race, Contact, CIQ On File (checkbox), CIQ Date (mm/dd/yyyy), Transcripts On File (checkbox), Transcripts Date (mm/dd/yyyy), and Transcripts Comments.
- Veteran Info:** Includes fields for Veteran (checkbox), From Date (mm/dd/yyyy), To Date (mm/dd/yyyy), and Credits Used (checkbox).
- Mailing Address:** Includes fields for Address, Address2, City, State, and Zip Code.

Fill in basic applicant info fields accordingly. No apps allowed checkbox prohibits individuals from filling out applications and you can provide the reason why under no app reason field.

Then move on to payment information, agency/department and other specifics.

- **Pay Method** - the way a person paid for exam, check, money order, credit card, etc.
- **Pay Ref #** - check number or money order reference number you want to use – when taking online applications it will be CC transaction number
- **Date Paid** - Date on check or money order - for reconciling later
- **Payee** - if there is a person paying for another person you can list name here
- **Agency/Department** - Dropdown selections - these will prefill for PROM exams if there is an employee record in the system for the person applying
- **Checkboxes:**
  - Veteran status on application (check veteran)
  - Special accommodations (check requested accommodations)
  - Cross filing (check cross filer and enter location they are taking it at), etc.
  - Requested Accommodations (check if special accommodations are needed)
  - Requested Alt. Date (check if they requested another exam date)
- **Notes** – any internal notes you want to make

Administrative Info section of Application – typically where you will do the most work on an application.

**Approved** – list of options for the application – yes, no, conditional

**For Approved** - If you answer yes, an approval comment field will appear

**For Disapproved:** If you answer no, disapproval reason and disapproval comment will appear. Disapproval Reason should be a general statement such as: Lacks minimum qualifications. (you can either type into that field or they can be setup for ones that are used most often, under setup > disapproval reasons)

Then Disapproval comment area can go into more detail and be specific to applicant: Applicant did not show the required 4 years of experience in accounting as outlined in the announcement.

These reasons and comments will then be available to insert into your letters to applicants – they will fill automatically with these fields.

**For Conditional** - Reason (can setup under setup > cond. reasons) and comment fields similar to not approved above, state general reason and then a more detailed comment.

**Checkboxes:**

- **Conditional** - For conditional approvals
- **Restricted** - If you have an instance where someone needs to be restricted outside of typical ones for performance exams; for instance: if a police officer can sit for an exam before a future birthday – they may be restricted

- **Restricted Reason and Restricted Comment** - same as above, reason is short general statement and comment is more detailed explanation.
- **Trainee** - flag an application as a trainee application

**Dates:**

- **Alternate Date** - if an alt date has been approved you can fill in alt date of test and reason for it.
- **Eligible Date** - goes hand in hand with restricted checkbox, you can put the date in that they do become eligible and if a list is established they will then appear on the list on that date.
- **Determination Date** - track date you made determination of approved or disapproved.
- **Provisional** - will get checked automatically if person is on file already as provisional employee
- **List Note** - Any notes you want to appear on the eligible list for this application
- **Sharing** – Agency, Department or User you want to share application with

Once all fields are filled out to your satisfaction then save using Save buttons in upper left corner.

**Viewing/Editing Existing Applications – Master Tab**

To view and/or edit the application click on the folder icon next to the application record.

ID	Submitted	App. Type	Status	No	Title	Online	Appv.	SSN(4)	Name	Agency	Dept
05/02/2022	EXAM	ACTIVE	000000	TEST EXAM TYPIST- NOT VALID	N	Y		SCHMIDT, GEOFF J	CITY	DPW	
04/28/2022	EXAM		000000	TEST EXAM TYPIST- NOT VALID	N	Y		SCHMIDT, GEOFF J			

That will open the specific application and you can edit from there. Save once changes are completed.

## Applications – Assessment Tab

Assessment information for the application will appear on this tab.

## Applications – Certs Tab

Shows when an application has been used in a certification.

Certifications				
Cert Date	Agency	Dept	Exam/Title	Action
05/10/2022	CITY	DPW	000000 / TEST EXAM TYPIST- NOT VALID	APPOINT

- **Cert Date** – The date of certification
- **Agency** – The agency associated with the position
- **Dept** – The department associated with position
- **Exam/Title** – The title of the exam

- **Action** – What action occurred

## Applications – Declinations Tab

This tab provides declination information for an application. Allows you to enter the reason(s) for declination. You can clear declinations here as well.

The screenshot displays the 'Declinations' tab in the HR Select system. At the top, there's a navigation bar with 'Master', 'Assessment', 'Certs', 'Declinations' (selected), 'Documents(1)', 'Messages(2)', 'Web Attach(2)', 'Online Response', and 'Versions'. Below this is a sub-header with 'New Agency Declination' and a table with columns: ID, Agency, Department, Date Added. The table is currently empty, showing 'No data available in table'. Below the table is a 'Declination Information' section with several checkboxes: 'Decline All', 'Declined Salary', 'Decline Temp', 'Decline Cont-Perm', 'Decline 10 Month', 'Decline 12 Month', and 'Temp Unavailable'. There are also input fields for 'Declined Hourly Amount' (18.0) and 'Declined Salary Amount'. A 'Temp Unavailable Date' field is set to 'mm/dd/yyyy'. A 'Notes' field is at the bottom.

- **Actions** – New Agency Declination – allows you to add a declination
- **Agency** – Agency associated with the position
- **Department** – Department associated with the position
- **Date Added** – The date the declination was added

The screenshot shows a 'Agency Declination Maintenance' dialog box. It has a 'Save Declination' button at the top. Below the button are two dropdown menus: 'Agency:\*' and 'Department', both currently showing 'Please select'.

### New Agency Declination Screen

#### Declination Information

- **Checkboxes**
  - **Decline all** – declines all
  - **Temp unavailable** – temporarily unavailable – use date field to enter unavailable date
  - **Declined salary** – declines salary – use with salary field to further explain amounts declined

- **Declined Cont-Perm** – declines contingent permanent position
- **Decline 10 Month/Decline 12 Month** – declines for this amount of time but wants to be considered after this time frame
- **Notes** – Notes regarding the declination

## Applications – Documents Tab

The application documents tab has two sections. The first section is a document upload area for admins to attach documents to this application. Any number of documents may be attached and categorized for this application. To upload a document you can drag a file from your desktop into the area marked "Drop files here to upload" or you can use the "Document Upload" link to select a file from your computer to upload.

The second section "Documents Attached to the APPLICANT" will list all documents that were uploaded to the applicant regardless of application.

The screenshot displays the HR Select application interface. At the top, there is a navigation bar with the HR Select logo and various menu items: Personnel, Opportunities, Correspondence, Online, Import/Export, Setup, Reports, and My Jobs. On the right side of the navigation bar, there are links for My Account and Log Out. Below the navigation bar, the breadcrumb trail reads: Home / Applications List / Application for SCHMIDT, GEOFF. The main content area is divided into two sections. The first section is titled "Document Upload" and contains a large box with the text "Drop files here to upload". Below this box is a search bar and "Previous" and "Next" buttons. The second section is titled "Documents Attached to the APPLICANT" and contains a search bar and "Previous" and "Next" buttons. Below the search bar is a table with the following columns: ID, Created, Private, Category, and Filename. The table contains one entry with the following data: ID: 08/09/2022 03:02 PM, Created: 08/09/2022 03:02 PM, Private: No, Category: Alternate Test Date Application, and Filename: alltestdaterequest.pdf.

- **Actions** - Folder icon is used for viewing a document, trashcan icon deletes the message
- **Created** - The date the document was added
- **Private** - Checking private will ensure that this document is not included when creating email packets of applications or job information
- **Category** - Documents can be categorized according to type. These categories are defined under Setup > Doc. Cats. Once setup a dropdown under Category will let you select the type you want.
- **Filename** - The filename of the uploaded document

## Applications – Messages Tab

Messages can be created to be emailed or mailed and can be tracked in delivery history. The tab shows how many messages the applicant has (in the screenshot there is a (2) to state there are two messages).

**Messages can be generated individually for an application.**

The screenshot shows the HR Select interface for the Messages tab of an application for SCHMIDT, GEOFF. The navigation bar includes options like Master, Assessment, Certs, Declinations, Documents(1), Messages(2), Web Attach(2), Online Response, and Versions. A dark gray navigation bar contains 'New Message' and 'Delete Application' buttons. Below this is a search bar and a 'Showing 1 to 2 of 2 entries' indicator. The main content area displays a table with two entries:

ID	Created	Updated	Print Date	User	Subject
	05/02/2022 10:51 AM	05/10/2022 10:32 AM	05/02/2022	gschmidt@discoveregov.com	ADMISSION NOTICE
	05/02/2022 10:41 AM	05/02/2022 10:41 AM	05/02/2022	gschmidt@discoveregov.com	ADMISSION NOTICE

Below the table, there is another 'Showing 1 to 2 of 2 entries' indicator and navigation buttons.

- **Actions** - Folder icon is used for viewing a message, trashcan icon deletes the message and the printer icon prints the messages.
- **Created** - The date the message was created
- **Updated** - The date a message was update if applicable
- **Print Date** - The actual print date of the message. This is specified when you create a batch of messages and may not be the current date. For emailed letters, this will be the date the system sends the email. For printed messages, this is the date that will be printed on the message.
- **User** - The user that created the message
- **Subject** - The subject line attached to the message

You create a new message by selecting "New Message" in the dark gray navigation bar.

Messages may be deleted using the trashcan icon up until the point they have been "delivered". This is a safeguard mechanism that makes sure any correspondence we have sent to applicants cannot be deleted after they have received it.

For information on creating a new message see: [Applicant – Create a New Message](#)

## Applications – Web Attach Tab

The web attach tab in an application provides a list of all attachments an applicant has uploaded to their online application.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Applications List / Application for SCHMIDT, GEOFF





Master Assessment Certs Declinations Documents(0) Messages(2) **Web Attach(2)** Online Response Versions

New Message Delete Application

**Web Attachments**

Show 25 entries Search: Showing 1 to 2 of 2 entries

Previous 1 Next

ID	Created	Private	Filename
 	08/19/2022 07:15 AM	No	gschmidt-resume.pdf
 	08/15/2022 04:14 PM	No	gschmidt-transcript.pdf

Showing 1 to 2 of 2 entries

Previous 1 Next

- **Actions** - Folder icon is used for viewing a document and the trashcan icon deletes a document

## Applications – Online Response

The online response tab provides an overview of ALL of the information that the applicant submitted via their online application. There is a field for reviewer to add internal notes and mark them as private. It also provides options for printing the application.

Master Assessment Certs Declinations Documents(0) Messages(2) Web Attach(2) **Online Response** Versions

New Message Delete Application

Print Application Print Public Application

**Application For:** [000000] TEST EXAM TYPIST- NOT VALID

Testing accommodation needed

This note is private

**Online Application Information**

SSN: [REDACTED] Email: [REDACTED]  
 Last Name: Schmidt First Name: Geoff Middle Name: J  
 Previous Name: [REDACTED]  
 Address: Home Phone: 111-222-3333 Cell Phone: 222-333-4444  
 123 Main St.  
 Pittsford, NY 11111

**PERMANENT LEGAL DOMICILE**

State your permanent legal domicile and indicate how long you have continuously resided there, up to and including the date of this application. (IMPORTANT) This section will determine what resident list to which your name will be certified.

State: NY	Years: 20	Months:
County: Monroe	Years: 20	Months:
Town: Pittsford	Years: 20	Months:
Village:	Years:	Months:
City:	Years:	Months:
School: Pittsford School District	Years: 20	Months:

**TESTING ACCOMMODATIONS**

Attach a description of accommodation needed and supporting documentation. We provide reasonable accommodations in testing for persons with disabilities. If you require special arrangements, attach official written documentation to this application supporting the type of special arrangements required (copy of IEP, physician's letter, etc.).

Yes, I need testing accommodations: YES

**ALTERNATE TEST DATE**

Attach supporting documentation. If you cannot take the test on the announced test date because of any of the following reasons, arrangements may be made for you to take the test on an alternate test date. If applicable, check the appropriate box below and attach supporting documentation with this application. In the case of an emergency on the exam day, contact the Department of Human Resources the next business day. You will be required to submit documentation of your emergency.

<b>Military Orders:</b> NO	<b>Religious Observance:</b> NO	<b>Vacation plans that were made BEFORE the examination was issued:</b> NO
Participant or immediate family member of a participant in a religious or civil ceremony (e.g. wedding, graduation, baptism, bar mitzvah): NO	A conflicting professional or educational examination: NO	A required court appearance or grand jury duty: NO

## Applications – Versions Tab

The versions tab tracks EVERY change made to an application record and includes the date and time of the change and the user that made it. It also includes the old and new value of the field.

The screenshot shows the 'Versions' tab for an application record for SCHMIDT, GEOFF. The interface includes a navigation bar with 'HR Select' and various menu items. Below the navigation bar, there are tabs for 'Master', 'Assessment', 'Certs', 'Declinations', 'Documents(0)', 'Messages(2)', and 'Versions'. The 'Versions' tab is active, showing a table of changes. The table has columns for 'Date', 'User', and 'Changes'. The changes listed include updates to 'cur\_pos', 'app\_status\_id', 'attended', 'rank', 'base\_score', and 'final\_score'. The user for all changes is 'gschmidt@discoveregov.com'. The table shows 8 entries, with the first one highlighted.

Date	User	Changes
05/10/2022 10:32 AM	gschmidt@discoveregov.com	cur_pos-[0, 1]
05/10/2022 10:32 AM	gschmidt@discoveregov.com	app_status_id-[4, 1]
05/02/2022 10:55 AM	gschmidt@discoveregov.com	attended-[nil, true]
05/02/2022 10:54 AM	gschmidt@discoveregov.com	cur_pos-[1, 0]
05/02/2022 10:54 AM	gschmidt@discoveregov.com	app_status_id-[1, 4]
05/02/2022 10:48 AM	gschmidt@discoveregov.com	pos-[nil, 1] cur_pos-[nil, 1] rank-[nil, 1]
05/02/2022 10:47 AM	gschmidt@discoveregov.com	base_score-[nil, 0.9e2] final_score-[nil, 0.9e2]
05/02/2022 10:33 AM	gschmidt@discoveregov.com	app_status_id-[nil, 1]

## Certifications

A complete list of all certification records in HR Select. Searching can be accomplished using the free form search box. As you began to type an exam title in the search box suggestions will be made. You may search Exam Title or Exam Number. Advanced filters provide more granular search options to narrow down results. Use the setup tab > cert codes to create actions that will exclude people from continual certification based on criteria.

The screenshot shows the 'Certification List' page in HR Select. It features an 'Advanced Filters' section with dropdown menus for 'Agency', 'Department', and 'Job Title'. Below the filters is a search box and a 'Show' dropdown set to '25 entries'. The main table displays certification records with columns for 'ID', 'Type', 'Status', 'Appl. Cnt', 'Resp. Cnt', 'Cert. Date', 'Ret Date', 'Agency', 'Department', 'Exam', and 'Cert Title'. One record is shown: ID 1, Type EXAM, Status completed, Appl. Cnt 1, Resp. Cnt 1, Cert. Date 05/10/2022, Ret Date 06/08/2022, Agency CITY, Department DPW, Exam 000000, and Cert Title TEST EXAM TYPIST- NOT VALID.

ID	Type	Status	Appl. Cnt	Resp. Cnt	Cert. Date	Ret Date	Agency	Department	Exam	Cert Title
1	EXAM	completed	1	1	05/10/2022	06/08/2022	CITY	DPW	000000	TEST EXAM TYPIST- NOT VALID

- **Actions** – The folder icon will open an certification for viewing or editing and the trashcan icon will delete a certification
- **New Certification** - Clicking the “New Certification” option will create a new certification form and allow you to add a certification to the system

- **Type** – The type of the opportunity; i.e.: exam, non-competitive, preferred, etc
- **Status** – The status of the Certification
- **Appl. Cnt** – How many applicants on the certification
- **Resp. Cnt** – The amount of responses for the canvass
- **Cert Date** – The date of the certification
- **Ret Date** – The expiration date the certification
- **Agency/Department** – The agency and department associated with certification
- **Exam** – The exam number associated with the certification
- **Cert Title** – The title of the exam associated with the certification

## Certifications – Creating a New Certification

Use the “New Certification” option to create a new certification. Required fields are marked with asterisks.

- **Certification Type** – The type of the opportunity; i.e.: exam, non-competitive, preferred, etc – once that is selected the exam to certify field appears and allows you to search through exams (title, number)

- **Agency/Department** – The agency and department that you are certifying for
- **Division** – Division such as police, fire, etc.
- **Job Title** – Prepopulated list of job titles as you type options will appear
- **Approval Workflow** – A workflow dropdown option list (must be setup under setup > workflows)
- **Date Requested** – The date a certification was requested
- **Reason for Request** – Why the request was made (i.e. To fill a position)
- **Requestor** – Who made the certification request
- **Requestor Title** – The title of the individual requesting certification
- **Requestor Address** – The address of the individual requesting certification
- **Location** – The geographic location of the position
- **Certification Date** – Date the certification was completed
- **Expiration Date** – Date certification expires
- **Date Returned** – Date the canvass was returned – designed to be filled in later when cert is returned
- **No. Positions** – How many positions are available
- **Months** – 12 months, 9 months, etc.
- **General/Residential** – If it is a general or residential
- **Request Type** – Type of request; open competitive, promotional, promotional departmental, etc
- **Job Type** – Type of job; permanent, contingent-permanent, temp, etc.
- **Job Time** – Is job full time, part time, etc
- **Salary Comment** – Any comments on salary
- **Salary From** – From range of salary
- **Salary To** – To range of salary
- **Wage Per** – How the salary is configured; hourly, weekly, yearly, etc.
- **Comments** – Any comments to note
- **Bottom Note** – Designed to print on the certification

Once your information is filled out then you click on save certification.

## **Viewing/Editing Existing Certifications – Master Tab**

To view and/or edit a certification click on the folder icon next to the certification record. It will then open the record and there will be multiple options in the menu bar.

### **Menu Bar**

**Import Applicants** – This will allow you to import applicants into the certification

**Delete Certification** – Deletes the certification

**Print Cert** - Print the certification

**Email Cert** – Email the certification

**New Message** – Creates a new message

**New Canvass** – Creates a new canvass

**Export** – Exports the certification

**Clone Cert** – Makes a copy of the certification – useful for making certifications for multiple agencies

The screenshot displays the 'Certification Information' form in the HR Select system. The form is for a certification titled 'CITY OF SARATOGA SPRINGS, 000000, ACCOUNT CLERK-TYPIST, 2022-05-10'. Key fields include: Certification Type (Exam), Exam to Certify ([000000][OC][TEST EXAM TYPIST- NOT VALID]), Agency (CITY OF SARATOGA SPRINGS), Department (PUBLIC WORKS), Division (Select Options), Job Title (ACCOUNT CLERK-TYPIST), Approval Workflow (Select Options), Date Requested (05/10/2022), Reason For Request (TO FILL A POSITION), Requestor (GEOFF SCHMIDT), Location (1 MAIN STREET ANYWHERE, NY 14534), Certification Date (05/10/2022), Expiration Date (06/08/2022), Date Returned (m/m/dd/yyyy), No. Positions (1), Months (12), General/Residential (General), Request Type (Open Competitive), Job Type (Permanent), Job Time (Full Time), Salary From (15.00), Salary To (20.00), and Wage per (HOUR). There are also fields for Salary Comment, Comments, and Bottom Note.

## Certifications – Importing Applicants

To import applicants into a certification use the import applicants option and a new candidate import screen will open. Advance filters will allow you to drill down to specifics you want to select for the certification. Or you may simply select individuals manually. Once you have your selects made you can use the import applicants button.

Candidate Import X

**Advanced Filters**

<b>Agency</b> <input type="text" value="Select Agency"/>	<b>Department</b> <input type="text" value="Select Department"/>	<b>Status</b> <input type="text" value="Select App Status"/>	
<b>County</b> <input type="text" value="Select County"/>	<b>Town</b> <input type="text" value="Select Town"/>	<b>City/Vill</b> <input type="text" value="Select City/Vill"/>	<b>School District</b> <input type="text" value="Select School District"/>

Limit Top  Groups  All Active  Ignore Declines  Only Male  Only Female  Only Non-Binary

Showing 1 to 1 of 1 entries

Search:

Pos	Score	VC	Sec85	Status	SSN	Name	County	School
1	90.0			ACTIVE		SCHMIDT, GEOFF		

## Certifications – Cover Sheet

You can use the cover sheet tab to create a cover sheet for your certification. The template field offers a dropdown of message templates previously setup under setup > message templates. Select your cover sheet template and it will fill in the editor area or create a completely customized sheet with the editor tools. You can update a template once it is loaded and it will only change the cover sheet not the template itself.

## Certifications – Applicants Tab

Once you import applicants the applicants tab shows all selected applicants for that specific certification. A summary of the applicant and list information will show for each individual. There is also an option to view any previous certifications for that applicant. There you can fill in the certification response, the list status, any comments, etc. Certification updates then appear on the eligible list.

Home / Certification List / Cert CITY OF SARATOGA SPRINGS, 000000, ACCOUNT CLERK-TYPIST, 2022-05-10

Master Cover Sheet Applicants(1) Documents(0) Messages(0) Canvass(0) Tracking

Import Applicants Delete Certification Print Cert Email Cert New Message New Canvass Export Clone Cert

Pos	Name/Address	Expiration	Final Score	Cert Response:	VC Used:
1.	SCHMIDT, GEOFF	05/02/2024	90.0	APPOINTED	<input type="checkbox"/>

List Status: ACTIVE  
 Comment: APPOINTED 18.00/hr  
 Salary: 18.0000 HOUR  
 Act. Date: 05/10/2022 Avail Date: mm/dd/yyyy

Previous Certifications

- **Pos** – Position on the list
- **Name/Address** – Name and address of applicant
- **Expiration** – Expiration date of the list
- **Final Score** – Final exam score includes any credits used
- **Cert Response** – The response to the certification
- **List Status** – The status of the applicant on the list; active, appointed, failed, etc.
- **Comment** – Any comments regarding applicant’s certification
- **Salary** – The salary for this certification
- **Act. Date** – The active date
- **Avail Date** – The availability date of applicant

## Certifications – Documents Tab

The certifications documents tab is a document upload area for admins to attach documents to this certification. Any number of documents may be attached and categorized for this application. To upload a document you can drag a file from your desktop into the area marked "Drop files here to upload" or you can use the “Document Upload” link to select a file from your computer to upload.

Home / Certification List / Cert CITY OF SARATOGA SPRINGS, 000000, ACCOUNT CLERK-TYPIST, 2022-05-10

Master Cover Sheet Applicants(1) Documents(1) Messages(0) Canvass(0) Tracking

Import Applicants Delete Certification Print Cert Email Cert New Message New Canvass Export Clone Cert

Document Upload

Drop files here to upload

Show 25 entries Search: Showing 1 to 1 of 1 entries

ID	Created	Private	Category	Filename
	08/15/2022 04:09 PM	No	Certification of Eligibles	GEN-AccountClerkCertification8-15.pdf

Showing 1 to 1 of 1 entries

- **Actions** – The folder icon is for viewing a document and the trashcan icon will delete the document
- **Created** - The date the document was added
- **Private** - Checking private will ensure that this document is not included when creating email packets of applications or job information
- **Category** - Documents can be categorized according to type. These categories are defined under Setup > Doc. Cats. Once setup a dropdown under Category will let you select the type you want.
- **Filename** - The filename of the uploaded document

## Certifications – Messages Tab

Messages can be created to be emailed or mailed and can be tracked in delivery history. The tab shows how many messages there are.

**Messages can be generated individually for an application.**

The screenshot shows the HR Select interface for the Messages tab. The navigation bar includes options like Master, Cover Sheet, Applicants(1), Documents(0), Messages(1), Canvass(0), and Tracking. Below the navigation bar, there are icons for Import Applicants, Delete Certification, Print Cert, Email Cert, New Message, New Canvass, Export, and Clone Cert. A search bar is present with the text 'Showing 0 to 0 of 0 entries'. The main content area displays a table with the following data:

ID	Print Date	User	Msg. Count	Subject
	05/24/2022	gschmidt@discovergov.com	1	Certifications Results

Below the table, there are 'Previous' and 'Next' navigation buttons and the text 'Showing 0 to 0 of 0 entries'.

- **Actions** - Folder icon is used for viewing a message, trashcan icon deletes the message and the printer icon prints the messages.
- **Print Date** - The actual print date of the message. This is specified when you create a batch of messages and may not be the current date. For emailed letters, this will be the date the system sends the email. For printed messages, this is the date that will be printed on the message.
- **User** - The user that created the message
- **Subject** - The subject line attached to the message

You create a new message by selecting "New Message" in the dark gray navigation bar.

Messages may be deleted using the trashcan icon up until the point they have been "delivered". This is a safeguard mechanism that makes sure any correspondence we have sent to applicants cannot be deleted after they have received it.

For information on creating a new message see: [Applicant – Create a New Message](#)

## Certifications – Canvass Tab

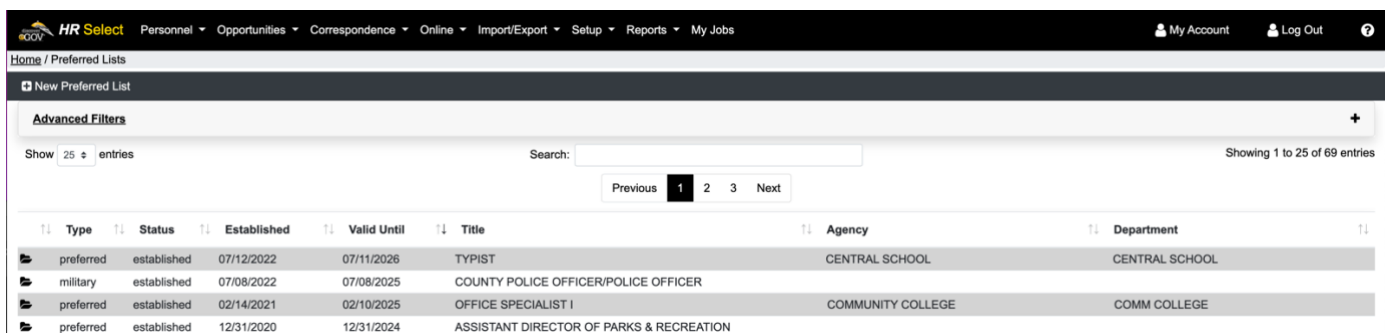
After you setup certification you can canvass on that certification.

## Certifications – Tracking Tab

Tracks the emailed certification – shows when they received it and when they opened it.

## Preferred Lists

A complete list of all preferred lists in HR Select. Searching can be accomplished using the free form search box. As you began to type an exam title in the search box suggestions will be made.



The screenshot shows the HR Select interface for Preferred Lists. It features a search bar and a table with the following data:

Type	Status	Established	Valid Until	Title	Agency	Department
preferred	established	07/12/2022	07/11/2026	TYPIST	CENTRAL SCHOOL	CENTRAL SCHOOL
military	established	07/08/2022	07/08/2025	COUNTY POLICE OFFICER/POLICE OFFICER		
preferred	established	02/14/2021	02/10/2025	OFFICE SPECIALIST I	COMMUNITY COLLEGE	COMM COLLEGE
preferred	established	12/31/2020	12/31/2024	ASSISTANT DIRECTOR OF PARKS & RECREATION		

- **Actions** – The folder icon will open the list
- **New Preferred List** - Clicking the “New Preferred List” option will create a new preferred list form and allow you to add a preferred list to the system
- **Type** – The type of the opportunity; i.e.: preferred, military
- **Status** – The status of the List: established, exhausted
- **Established** – Date list is established
- **Valid Until** – Date the list is valid until
- **Title** – The title of the Exam list is for
- **Agency/Department** – The agency and department associated with the position

## Preferred List – Creating a New Preferred List

Use the “New Preferred List” option to create a new Preferred List. Required fields are marked with asterisks.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Preferred Lists

Save Preferred List

List Type: [Dropdown] Job Title: [Select Options] Status: [Dropdown]

List Title: [Text Field]

Agency: [Please select] Department: [Please select]

Established Date: [mm/dd/yyyy] Expiration Date: [mm/dd/yyyy]

Notes: [Text Area]

- **List Type** – Preferred or Military
- **Job Title** – Prepopulated list of job titles as you type options will appear
- **Status** – Dropdown of options regarding list: exhausted, certified, complete, etc.
- **List Title** – Title you want to assign to list
- **Agency/Department** – The agency and department that are associated with list
- **Established Date** – Date list is established
- **Expiration Date** – Date the list is valid until
- **Notes** – Any notes you want associated with list

Once fields are completed click save preferred list. Your list will then populate in the main screen.

## Preferred List – Adding Candidates

Use the folder icon to open a preferred list, now you will see a candidate tab. This is where you will add candidates to the list using the new candidate option. You can also delete the list or print the list from here. A documents tab is also available for any documents you may want to attach to the list.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Preferred Lists / Preferred List ASSISTANT DIRECTOR OF PARKS & RECREATION

Master Candidates Documents(0)

Delete List Print List

New Candidate

Show 25 entries Search: [Text Field] Showing 1 to 1 of 1 entries

#	Name	Seniority Date	Layoff Date	Salary	Notes/Activity	Valid Until
1	[Redacted]	01/01/2008	12/31/2022			12/31/2024

Showing 1 to 1 of 1 entries
















# Correspondence

Our correspondence category includes deliveries and mass messaging options. These tools will provide the user the ability to send out messages, track messages and verify receipt of messages as well as a way to mass message outside of any exam, job, applicant or application.

Prior to scheduling correspondence to be sent out, you must setup your message templates for letter creation.

## Message Templates

Under Setup > Message Templates you can create letter templates using tokens to be sent out to both applicants and employees through our delivery system.

ID	Name	Form	Last Update
  	ADMISSION NOTICE	no	10/30/2025 02:18 PM
  	Cert Cover Sheet	no	10/29/2025 10:26 AM
  	EMPL - PROBATIONARY REPORT	yes	09/26/2023 10:37 AM
  	Probation Form	yes	09/25/2024 02:06 PM
  	Restriction Letter	no	10/30/2025 02:18 PM

- **Actions** – The folder icon will open the message template for editing, trashcan will delete the template and the pdf icon will open it as a pdf preview to allow you to see what it will look like to the recipient.
- **Name** – Name of the message template.
- **Form** – If the template is a form or not (forms to not usually include letterhead).
- **Last Update** – The date of the last update on that template.

## New Message Template (Letter)

To create a new message template, click on new letter in the message template setup screen. A blank message template will open. Once the template is open select the type of message you are creating with the checkboxes:

If it is a typical letter using your main letterhead then no checkboxes should be checked.

The form checkbox removes the letterhead so you can create a message with no letterhead; the bulk mailer checkbox is only for very specific installs who use a print center at their facility (additional setup required); and the certification cover sheet checkbox is used if you want an different letterhead setup for the certification sheet (additional setup required).

Next step is to either type in your letter in the editor field or paste it in from a document. Please be aware that if you copy and paste from Word or other programs you can potentially bring in extraneous code from those

programs that may give unexpected results. We highly recommend pasting from the other document as plain text using the tool on the toolbar circled below. You can then use the tools provided to format your letter with bold, italic, underlines, etc as needed. Name your letter, add your field tokens and save.



## Editing Existing Message Template

Use the open folder icon to enter a letter template. Once the template opens you can then go in and edit any portion of the letter you need to. Once you are done with edits save the file. **Important Note:** New versions will only appear in any new messages created AFTER the edit – any previous messages already in system that used that template will still show original version – that way it keeps message integrity of what was actually sent.

## Message Tokens

Populating your message template with tokens where appropriate will allow you to bring in information automatically from system records instead of typing it in manually – it is similar to mail merge in Word. For instance if the beginning of your letter states Dear Applicant Name, you can enter a token for the person’s name so when you create a batch of these letters for an exam, the names all populate automatically similar to this:

Dear \$\$person.full\_name\$\$,

You are taking Exam \$\$exam.exam\_no\$\$ on \$\$applicant.exam\_date.short\$\$.

Above is example of tokens in the template and this is final result in actual message:

Dear Angel Adams,

You are taking Exam 99999 on 01/30/24 12:00 am.

We have a complete list of tokens with their descriptions – if you do not have you can request from us at any time.

## Setting up Messages

Many modules in our system allow you to setup messages – please navigate to the module in this manual where you would like to create the message for full instructions. In brief detail the steps to setting up a message are:

1. Go to module where you want to send the message and click the messages tab (i.e.: exams for an admission letter)
2. Click new message and choose the applicants you want to send the letter to
3. Choose the template you want to use and date it should go out
4. Update the letter if necessary (NOTE: this will only update this letter, not the original template)
5. Save Message

## Deliveries

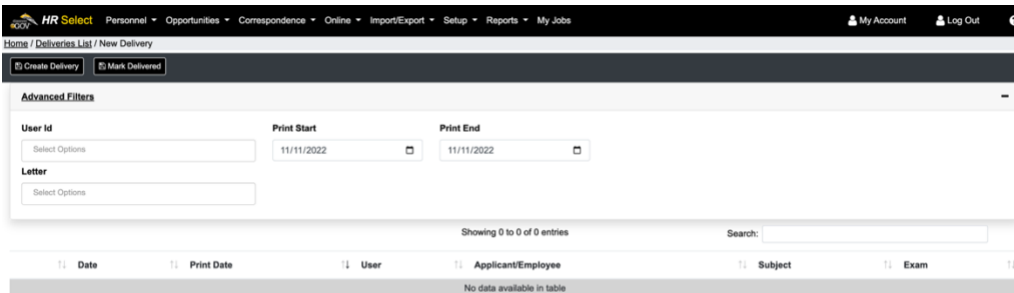
Messages will not automatically send until a delivery is created. Using Correspondence > Deliveries you can setup deliveries for your messages. Deliveries refer to any batch or single delivery of a message either by printing or by email. Whether someone receives a hardcopy, email or both is controlled by the "Contact" field in their Applicant Record. The main delivery screen is a summary of all deliveries.

ID	Date	User	Messages	Paper	Electronic	Both	Delivered	Bounced	Unknown
	11/11/2022	kgudich@discoveregov.com	4	2	2	0	2	0	0
	02/11/2022	kgudich@discoveregov.com	1	1	0	0	0	0	0

- **Actions** – The folder icon will open the delivery, trashcan will delete the delivery (if the delivery has not taken place yet) and New Delivery will create a new delivery.
- **Date** – Date delivery is scheduled.
- **User** – The user that created the delivery.
- **Messages** – The count of messages in the delivery
- **Paper** – Count of messages that are paper (for printing)
- **Electronic** – Count of messages that are email
- **Both** – Count of messages that are both paper and email
- **Delivered** – Count of messages that have been delivered
- **Bounced** – Count of messages that bounced
- **Unknown** – Count of messages that are not designated as printed or delivered

## New Delivery

To create a new delivery, click on new delivery under the deliveries summary screen. Using the advanced filters you can limit the new delivery to any of the selections (user, date, letter, etc). As you select different filters to use you will see the list of letters change on screen.



When your selections are done, click 'Create Delivery'. A pop-up will then appear stating how many messages will be created – be sure this number is close to what you expect before you say ok (500 vs 20 letters for example) because once you say ok, there is very little time to delete it if it is wrong – the system checks for letters to send out approximately every 10 minutes. If the number is not what you expect click cancel and look at your filtered list to see why there is more/less than you want to send.

test.mycivilservice.com says

Are you sure you want to create this delivery? There will be 1 messages created!



Once you say ok it will take you back to the main delivery screen and you will see the summary of counts for that delivery.

## Viewing and Printing Delivery

After creating the delivery, you will see that the messages are sorted into those needing to be printed for hardcopy and those that will be emailed on the summary page. The emailed ones will be sent automatically. If there are hardcopy messages in your batch you will click on the folder icon which will open the delivery and you have an option to "Print Postal Messages" at the top. This will allow you to print all the hardcopy letters in one batch for mailing.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Deliveries List / Delivery

Main Activity Bounces No Delivery

Print Postal Messages

Show 25 entries Search: Showing 1 to 4 of 4 entries

Previous 1 Next

Date	User	Method	Applicant	Subject
11/11/2022	kgudich@discoveregov.com	email	Gudich, Kathy	ADMISSION NOTICE
11/11/2022	kgudich@discoveregov.com	email	Schmidt, Geoff	ADMISSION NOTICE
11/11/2022	kgudich@discoveregov.com	postal	Justofin, Kathleen	ADMISSION NOTICE
11/11/2022	kgudich@discoveregov.com	postal	Kelly, Lyn	ADMISSION NOTICE

Showing 1 to 4 of 4 entries

Previous 1 Next

This screen also has tabs for ‘Activity’, ‘Bounces’ and ‘No Delivery’ which allow you to further see more information on the delivery. They track all emails that are sent and when people open them, etc. Each individual applicant in the system also has a tracking tab that contains the same information.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Deliveries List / Delivery

Main Activity Bounces No Delivery

Show 25 entries Search: Showing 1 to 25 of 30 entries

Previous 1 2 Next

Date	Event	Exam	Email	Subject
11/11/2022 08:56 PM	open	[65110][OC][DISPATCHER	gschmidt@discoveregov.com	ADMISSION NOTICE
11/11/2022 06:16 PM	open	[65110][OC][DISPATCHER	gschmidt@discoveregov.com	ADMISSION NOTICE
11/11/2022 04:30 PM	open	[65110][OC][DISPATCHER	gschmidt@discoveregov.com	ADMISSION NOTICE
11/11/2022 03:10 PM	open	[65110][OC][DISPATCHER	gschmidt@discoveregov.com	ADMISSION NOTICE
11/11/2022 02:27 PM	open	[65110][OC][DISPATCHER	gschmidt@discoveregov.com	ADMISSION NOTICE

The Activity tab will detail each event at a specific time for each message sent.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Deliveries List / Delivery

Main Activity Bounces No Delivery

Show 25 entries Search: Showing 1 to 1 of 1 entries

Previous 1 Next

Date	Event	Exam	Email	Subject
11/11/2022 08:56 PM	dropped	[65110][OC][DISPATCHER	lyn.kelly@discoverego	ADMISSION NOTICE

Showing 1 to 1 of 1 entries

Previous 1 Next

The bounces tab will display any messages that bounced and the event that caused it.

HR Select Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home / Deliveries List / Delivery

Main Activity Bounces No Delivery

Print Postal Messages

Show 25 entries Search: Showing 1 to 2 of 2 entries

Previous 1 Next

Date	Exam	Email	Subject
11/11/2022 02:09 PM	[65110][OC][DISPATCHER	kgudich@discoveregov.com	ADMISSION NOTICE

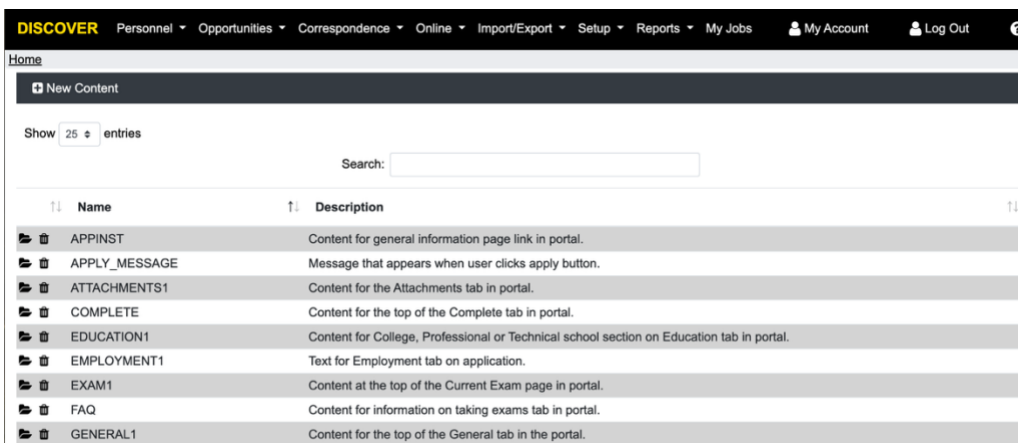
The no delivery tab will display any messages that did not get delivered.

# Online

The online dropdown menu includes options for: content, online users, online apps, and subscriptions. These options are specifically connected to the online portal. If you are not using the Discover portal setup they are not applicable to your install.

## Content

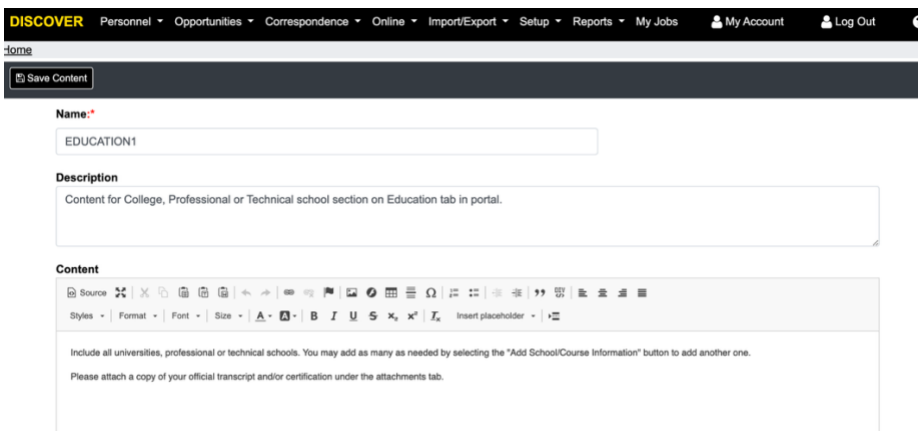
This section of the Discover system allows you to make real time updates to your portal pages. Content sections are setup during the launch of the portal and are listed here with descriptions.



Name	Description
APPINST	Content for general information page link in portal.
APPLY_MESSAGE	Message that appears when user clicks apply button.
ATTACHMENTS1	Content for the Attachments tab in portal.
COMPLETE	Content for the top of the Complete tab in portal.
EDUCATION1	Content for College, Professional or Technical school section on Education tab in portal.
EMPLOYMENT1	Text for Employment tab on application.
EXAM1	Content at the top of the Current Exam page in portal.
FAQ	Content for information on taking exams tab in portal.
GENERAL1	Content for the top of the General tab in the portal.

- **Actions** – The folder icon will open the content, trashcan will delete the content.
- **Name** – Correlates to section in portal – *do not rename or they will no longer appear!*
- **Description** – General description of where the content is displayed on the portal.

To edit content use the open folder icon to enter the content piece that needs changes. The editor is similar to the message template editor. Type in your changes and click on save content button. You should see the update in your portal immediately if you refresh the page.



Name\*

EDUCATION1

Description

Content for College, Professional or Technical school section on Education tab in portal.

Content

Include all universities, professional or technical schools. You may add as many as needed by selecting the "Add School/Course Information" button to add another one.

Please attach a copy of your official transcript and/or certification under the attachments tab.

Using the New content button will allow you to create a new section of content however it will not appear on the portal until you submit a ticket to us at our help desk asking us to add that new section to your portal code base.

## Online Users

This section provides a view of all users who have setup accounts in your online portal.

## Online Apps

This section provides a view of applications from your portal. It advises when they were created, submitted, their status, if they were exported into your Discover system, name of applicant and title and no from the online post. This area is vital to check periodically to help with reconciling your payments to the applications you receive in from your portal.

Created	Submitted	Status	Exported	Email	Name	Post Title	Post No.
10/31/2025 08:18 AM	10/31/2025 08:51 AM	complete	Y			SENIOR ACCOUNT CLERK- SENIOR ACCOUNT CLERK- TYPIST	60023670
10/31/2025 06:50 AM	10/31/2025 07:12 AM	complete	Y			DATA ENTRY OPERATOR II	6108
10/30/2025 02:23 PM		incomplete	N			HEAD SOCIAL WELFARE EXAMINER	70016370
10/30/2025 03:11 PM		incomplete	N			CORRECTION OFFICER	60031650

## Subscriptions

If you are using our email subscription service on your Discover portal this view will display the email of all individuals that have signed up to receive the email alerts along with the category they signed up for (provided you are using individual categories).

Created	Email	Category
01/23/2024 08:14 PM		Human Resources/Personnel
01/23/2024 08:14 PM		Probation Services
01/23/2024 08:14 PM		Communications/Public Relations
01/23/2024 08:14 PM		Transportation
01/23/2024 08:14 PM		Planning
01/23/2024 08:14 PM		Mental Health
01/23/2024 08:14 PM		School District Support Staff
01/23/2024 08:14 PM		Purchasing
01/23/2024 08:14 PM		Clerical/Secretarial/Receptionist/Office Work

# Import/Export

## Application Exports

The application export option allows you to export multiple applications based on selections you make with the comprehensive advanced filters. Once exported you receive a .csv file with information on both the applicant and the exam/vacancy they applied for.

The screenshot shows the 'Export Data' interface. At the top, there is a 'Show 10 entries' dropdown and a search bar. Below this is the 'Advanced Filters' section, which includes several filter categories: Agency, Department, Status, Titles, Exams, App Date Range, Exam Date Range, From Score, To Score, Pay Methods, and checkboxes for 'Only Passing', 'Only Failing', 'Only Approved', 'Only Disapproved', and 'Only Conditional'. There is also a '1 Record Per Applicant' checkbox. Below the filters, it says 'Showing 1 to 2 of 2 entries (filtered from 55 total entries)'. The table below has columns for SSN4, Name, Agency, Department, Type, No, Title, and Date. The data rows are:

SSN4	Name	Agency	Department	Type	No	Title	Date
9369	Candidate, Test	LIBRARY	MAYOR	EXAM	009	CHIEF INFOR. TECHNOLOGY OFFICER	11/02/2023
9999	TESTUPDATENAMETWO, Kathy			EXAM	009	CHIEF INFOR. TECHNOLOGY OFFICER	08/08/2024

## Setup

This area contains basic setup tables that the Discover system uses for many of its select options and basic direction. You will be able to add items in most tables but you cannot delete any entries and that to ensure data integrity. Some tables allow you to make items inactive if you no longer need them.

## Agencies

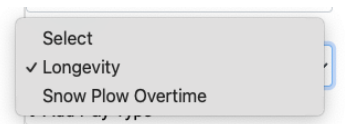
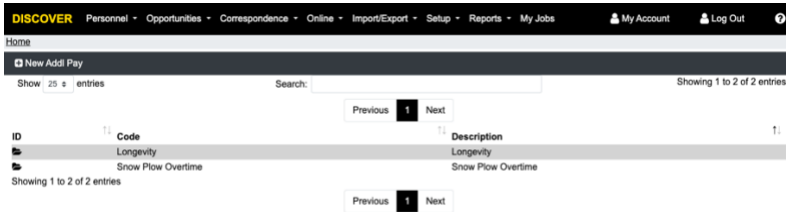
All agencies associated with your install. Depending on your setup there may only be one county agency or many. Each agency listed can be tagged with a “type” for reporting purposes such as city, town, county, special district, etc. You can use the “New Agency” text to add additional agencies. These agencies are then available for selection in the Agency field for positions and employees.

The screenshot shows the 'New Agency' table. At the top, there is a 'Show 25 entries' dropdown and a search bar. Below this is a 'Previous 1 Next' navigation bar. The table has columns for ID, Abbrv, Name, and Agency Type. The data rows are:

ID	Abbrv	Name	Agency Type
	AWD	AGENCYWITHDIV	TOWN
	C of C	CITY OF CITY	CITY
	CENTER	CITY CENTER	CITY
	CNTY	DISCOVER EGOV COUNTY	COUNTY
	DEMO	DEMO	COUNTY
	HOUSING	HOUSING AUTHORITY	SPECIAL DISTRICT
	LIBRARY	LIBRARY	LIBRARY
	SCHOOL	SCHOOL DISTRICT	SCHOOL DISTRICT

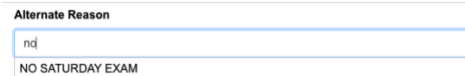
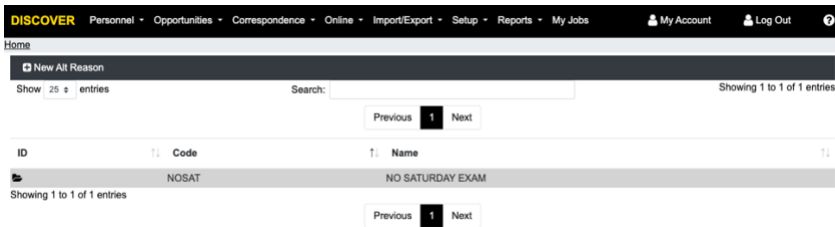
## Additional Pays

All additional pays that you may need to record in the employee records. Once they are setup they will be available in the “Additional Pay” dropdown field in the employee history screen. To add an additional pay select the “New Addl Pay” text. If you want the pay always included in their total wage then check the “Include” button in the setup screen. If you want do not want it included each time then do not check that box - you will still be able to include it on a per use basis in the history action screen.



## Alt Reasons

All Alternate Test Date Reasons that may be requested by applicants on an application. Once it is setup it will be available in the “Alternate Reason” field in the application screen. You may type a “\*” into the field to see full list of all reasons for selection. To add an additional reason select the “New Alt Reason” text.



## App Statuses

All Application Statuses that will be used to determine an applicant’s list status. Once a status is setup it will be available in the “List Status” field in the application screen. To add an additional status select the “New App. Status” text.

DISCOVER Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home

New App. Status

Show 25 entries Search: Showing 1 to 6 of 6 entries

Previous 1 Next

ID	Code	Name	Description
	ACTIVE	ACTIVE	ACTIVE
	APPOINT	APPOINTED	APPOINTED
	F	FAILED	FAILED
	FTA	FTA	FTA
	NLU	NO-LOCATION	DECLINED CANVASS: LOCATION UNACCEPTABLE
	R	REMOVED FROM ELIGIBLE LIST	REMOVED FROM ELIGIBLE LIST

Showing 1 to 6 of 6 entries

Previous 1 Next

List Status

- ACTIVE
- APPOINTED
- FAILED
- FTA
- NO-LOCATION
- REMOVED FROM ELIGIBLE LIST

When setting up a new status you want to be sure that the eligible dropdown is set correctly so that the system understands what to do with an applicant set with that specific status. If eligible is set to “yes” they will appear on the eligible list, if it is set to “no” they will not appear on the list and if set to “inactive” they will appear on the list but not take any positions – their current position would be set to 0 – not ranked via their score as an eligible applicant would be. If any of the checkboxes correlate to the status itself then they should be checked as well.

DISCOVER Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home

Save App. Status

Status Code: ACTIVE

Status Name: ACTIVE

Status Description: ACTIVE

Eligible: Yes

Appointed  Active  Inactive  Fta  Withdrew

## Auth. Codes

All Authorization Codes you may need to use in your employee history records. Once a code is setup it will be available in the “Authorization” field in the employee history screen. You may type a “\*” into the field to see full list of all codes for selection. To add an additional status select the “New Auth Code” text.

DISCOVER Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home

New Auth Code

Show 25 entries Search: Showing 1 to 7 of 7 entries

Previous 1 Next

ID	Code	Description
	LTR	A LETTER
	EL	ELIGIBLE LIST
	F	Finalized
	MSD	MSD FORM
	CSL	PROMOTED UNDER SECTION 52.7
	RUL	RULE
	SA	SETTLEMENT AGREEMENT

Showing 1 to 7 of 7 entries

Previous 1 Next

Authorization

- MSD FORM
- PROMOTED UNDER SECTION 52.7
- A LETTER
- ELIGIBLE LIST
- RULE
- SETTLEMENT AGREEMENT

## Canv. Questions

All custom canvass questions you may want to use in addition to your base canvass letter. Setup new question by selecting New Canvass Question link.

DISCOVER Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home

New Canvass Question

Show 25 entries Search: Showing 1 to 3 of 3 entries

Previous 1 Next

ID	Code	Description
	AUTH	Are you authorized for Canvassing ?
	TestQ	Did the question test work?
	TypeAppt	What type of appointment are you willing to take

Showing 1 to 3 of 3 entries

Previous 1 Next

As you setup the question you will list if it is a select type answer (as displayed below; for full, part time or temp work), if multiple answers are allowed, etc. Remember it should match the actual question that you have on your letter template so you can record the answers appropriately.

DISCOVER Personnel Opportunities Correspondence Online Import/Export Setup Reports My Jobs My Account Log Out

Home

Save Canv. Question

Code:\* TypeAppt Description:\* What type of appointment are you willing to take

Allow Multiple?  is Select?

Options  
FULL,PART,TEMP

DataSet DataSet Field

Once a question is setup it will be available to load into a canvass reply section so that you can record any answers you receive.

Print Date:\* 11/10/2025 Return Date:\* 05/31/2025 Agency:\* SCHOOL DISTRICT Department:\* SCHOOL DISTRICT

Positions:\* 1 Job type:\* PERMANENT Job Time:\* FULL TIME Salary From: Salary To:

[TypeAppt]What type of appointment are you willing to take - Remove This Question

+ Add Canvass Question

What type of appointment are you willing to take

Please Select  
FULL  
PART  
TEMP

Comment

## Canv. Codes

All canvass replies that you need to record. Setup a new reply by selecting New Canvass Code link.

The screenshot shows the 'Save Canv Code' form in the DISCOVER system. The form includes the following fields and options:

- Cert Code:** Text input field containing 'NL'.
- Cert Name:** Text input field containing 'LOCATION'.
- Cert Description:** Text input field containing 'LOCATION IS UNSATISFACTORY'.
- Eligible List Status:** Dropdown menu with 'NO-LOCATION' selected.
- Exclusion Options:**
  - Exclude Cert
  - Exclude Location
  - Exclude Salary
  - Exclude Time
  - Exclude Type
  - Exclude All
  - Exclude Until

Once set it up you can select options to limit individual from a certification if they respond with this reply or change their eligible list status based on the reply.

## Cert. Codes

All cert codes you need to track when certifications are returned. Setup a new cert. code by selecting New Cert Code link.

The screenshot shows the 'Save Cert Code' form in the DISCOVER system. The form includes the following fields and options:

- Cert Code:** Text input field containing 'APPOINT'.
- Cert Name:** Text input field containing 'APPOINTED'.
- Cert Description:** Text input field containing 'APPOINTED'.
- Eligible List Status:** Dropdown menu with 'APPOINTED' selected.
- Exclusion Options:**
  - Appointed
  - Create roster
  - Exclude location
  - Exclude salary
  - Exclude time
  - Exclude type
  - Exclude months
  - Exclude all
  - Exclude until
  - Exclude Temp.
  - Exclude Cont. Perm.
  - Exclude 10 Month
  - Exclude 12 Month
  - Reinstata
  - Is undeliverable
- Letter:** Dropdown menu with 'Please Select' selected.

Using the Create roster checkbox will automatically open a new employee screen where you can add in the candidate directly from the certification area if that code is applied to their certification record. For instance if you setup an “appointed” code as above with the “create roster” checkbox checked once you apply it to a candidate on the certification a new employee record screen will automatically open with information prepopulated for the individual and you can add them into roster directly from there.

## Conditional Reasons

All conditional reasons you need to use for marking applications as conditional. Setup a new reason by selecting New Conditional Reason link. Once you add the description in save.

The screenshot shows the 'Save Conditional Reason' form. At the top, there is a navigation bar with 'DISCOVER' and various menu items like 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. On the right, there are links for 'My Account', 'Log Out', and a help icon. Below the navigation bar, there is a 'Home' link and a 'Save Conditional Reason' button. The form has two main sections: 'Reason Code' and 'Reason Description\*'. The 'Reason Code' field contains the text 'MISSING TRANSCRIPT'. The 'Reason Description\*' field contains the text 'APPLICANT MISSING REQUIRED TRANSCRIPT'.

## Controls

All control settings for your install. This list is only editable by Discover staff – there are no options to add or update any of these controls available in the user interface.

The screenshot shows the 'Controls' list. At the top, there is a navigation bar with 'DISCOVER' and various menu items. On the right, there are links for 'My Account', 'Log Out', and a help icon. Below the navigation bar, there is a 'Home' link, a 'Show 25 entries' dropdown, a search box, and a 'Showing 1 to 25 of 65 entries' indicator. Below the search box, there are navigation buttons for 'Previous', '1', '2', '3', and 'Next'. The table below has the following data:

ID	CTL Name	CTL Value
3	DEFAULTREFDATE	
122	RPC-FROM	noreply@discovergov.com
47	EFORM-PERM-APPT	1
19	APPD-STATUS	1
13	DEFAULT-COUNTY	1

## Counties

All counties you need available for the system county dropdown field. You can add counties in by selecting the New Counties link and adding the name.

The screenshot shows the 'Save County' form. At the top, there is a navigation bar with 'DISCOVER' and various menu items. On the right, there are links for 'My Account', 'Log Out', and a help icon. Below the navigation bar, there is a 'Home' link and a 'Save County' button. The form has a single section: 'County Name\*'. The 'County Name\*' field contains the text 'ANY COUNTY'.

## COVID Status

All Covid Statuses you may want to track. You can add statuses by selecting the New Status link and adding the description.

The screenshot shows the 'Save COVID Code' form in the DISCOVER system. The navigation bar includes 'DISCOVER' and various menu items like 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. On the right, there are links for 'My Account' and 'Log Out'. Below the navigation bar, there is a 'Home' link and a 'Save COVID Code' button. The form contains two input fields: 'Code:\*' with the value 'N' and 'Description:\*' with the value 'NEGATIVE'.

## Departments

All departments in your County/City. You can add departments by selecting the New Department link and adding the required fields. Connect it to the proper agency with the agency dropdown menu.

The screenshot shows the 'Save Department' form in the DISCOVER system. The navigation bar is identical to the previous screenshot. Below the navigation bar, there is a 'Home' link and a 'Save Department' button. The form contains four input fields: 'Code' (ACCOUNT), 'Department Abbr.\*' (ACCOUNT), 'Master Dept.\*' (ACCOUNT), and 'Department Name:\*' (ACCOUNTS). There is also an 'Agency:\*' dropdown menu set to 'DISCOVER EGOV COUNTY'. At the bottom, there is an 'Inactive' checkbox which is currently unchecked.

## Disapproval Reasons

All disapproval reasons you need to use for marking applications as disapproved. Setup a new reason by selecting New Disapproval Reason link. Once you add the description in save.

The screenshot shows the 'Save Disapproval Reason' form in the DISCOVER system. The navigation bar is identical to the previous screenshots. Below the navigation bar, there is a 'Home' link and a 'Save Disapproval Reason' button. The form contains two input fields: 'Reason Code:\*' with the value 'LACKS EDU' and 'Reason Description:\*' with the value 'LACKS MINIMUM EDUCATION REQ.'.

## Divisions

All divisions in your County/City. You can add divisions by selecting the New Division link and adding the required field.

The screenshot shows the 'Save Division' form in the DISCOVER system. The navigation bar includes 'DISCOVER', 'Personnel', 'Opportunities', 'Correspondence', 'Online', 'Import/Export', 'Setup', 'Reports', and 'My Jobs'. User options for 'My Account' and 'Log Out' are visible. The form has a 'Save Division' button and two input fields: 'Division Code' with the value 'DPW-RC' and 'Division Description\*' with the value 'DPW ROAD CREW'.

## Document Category

All the different types of documents you may want to upload in the system. You can add a category by selecting the New Document Category link.

The screenshot shows the 'Save Document Category' form in the DISCOVER system. The navigation bar is identical to the previous screenshot. The form has a 'Save Document Category' button and a single input field for 'Category Description\*' containing the text 'Roster Card'.

Once a category is loaded it will be available to you in the category column on the documents tab. There you can tag the document so you can see at a glance what types of documents are in that record.

The screenshot shows the 'Documents' tab in the DISCOVER system. The navigation bar includes 'Master', 'History', 'Documents', 'Messages(11)', 'Perf Tests', 'Tracking', and 'Versions'. Below the navigation bar are links for 'New Application', 'New Message', and 'Delete Applicant'. The main content area is titled 'Document Upload' and features a large box with the text 'Drop files here to upload'. Below this is a search bar and pagination controls showing 'Showing 1 to 1 of 1 entries'. A table lists document entries with columns for 'ID', 'Created', 'Private', and 'Filename'. The first entry has a 'Private' status of 'No' and a filename of 'testdc.pdf'. A dropdown menu is open over the 'Private' column, showing options: 'Select', 'Applicant Information', 'Exam-Opportunity Announcement', and 'Roster Card'.

ID	Created	Private	Filename
	01/31/2023 04:33 PM	No	testdc.pdf

## Exam Sites

All exam sites you will be using for testing. Once they are loaded they will be available to you in the exam scheduling screen. You can add a site by selecting the New Exam Site link.

The screenshot shows the 'Save Exam Site' form in the DISCOVER system. The form includes the following fields and options:

- Site Code:** 0002
- Site Name:** Site Exam Name 1
- Room:** 2222
- Address:** #1 Main Ave, Anytown, NY
- Capacity:** 50
- Directions:** (Empty text area)
- Active:**

You can load the exam site in the scheduling tab and set the number of candidates to assign to that site and an exam date.

The screenshot shows the 'Written' exam scheduling screen in the DISCOVER system. The 'Locations for Written Phase' table is visible, with the following columns and data:

Exam Location	# to Assign	Date	Remove
Select Options		mm/dd/yyyy, --:--	- Remove
Agility Course-[ROOM-Track Field]			
CODING EXAM SITE-[ROOM-9]			
Site Exam Name 1-[ROOM-2222]			

Below the table, there are links for '# Assign Locations' and 'Export'. The page also shows 'Show 25 entries'.

## Fire Dists.

All fire districts you need to track in the system. You can add a district by selecting the New Fire District link.

The screenshot shows the 'Save Fire District' form in the DISCOVER system. The form includes the following fields:

- District Code:** TFD
- District Name:** Test Fire District

## Grade Types

All grade types you need to track in the system. You can add a type by selecting the New Grade Type link. You can connect the grade type to a union with the dropdown options.

The screenshot shows the 'Save Grade Type' form in the DISCOVER system. The form has a dark header with the 'DISCOVER' logo and navigation menus. Below the header, there are two input fields: 'Name' with the value 'CSEA - SHRF' and 'Pay Description' with the value 'CSEA - SHERIFF'. Below these is a 'Union' dropdown menu with 'Test Union' selected. A 'Save Grade Type' button is located at the top left of the form area.

## Grades

All grades/steps you need to track in the system. You can add a grade with steps by selecting the New Grade link. You will need to connect the grade with a grade type and an expiration date if necessary. Once the grade is added you can also add in the amounts for each step in that grade starting at Step 1.

The screenshot shows the 'Save Grade' form in the DISCOVER system. The form has a dark header with the 'DISCOVER' logo and navigation menus. Below the header, there are buttons for 'Clone Grade' and 'Delete Grade', and a 'Save Grade' button. The form contains several input fields: 'Grade' with the value 'TST01', 'Grade Type' with a dropdown menu showing 'CSEA - SHERIFF', and 'Expiration' with a date input field showing 'mm/dd/yyyy'. Below these are 36 numbered steps, each with an input field for a value. The first few steps have values: Step 1 (15.00), Step 2 (18.00), Step 3 (20.00), Step 4 (25.00), Step 5 (30.00), and Step 6 (35.00). The remaining steps are empty.

## History Actions

All history actions you need to track in the system. You can add an action by selecting the New History Action link. Actions are typically setup on launch of install. Checkboxes are available to further detail what the history action accomplishes. For example if an “Appointment” Action should “hire” that individual then the hired checkbox should be checked. If a “Terminated” Action should “remove” a person from their position then the removed checkbox should be checked. Inactive will allow the action to remain on historical records but not be available for use in any future actions.

**Action Name:**

**Action Description:**

Removed
  Hired
  Don't Check Position
  Encumber
  Position Start
  Position End

**Prob. Wks.**

Push History

**Letter**

**Rpc class**

Use in RPC
  Inactive

## Job Titles

All job titles you need to track in the system. You can add a title by selecting the New Job Title link. Both short title and long title are mandatory. Other title field is for abbreviated or slightly different titles that may come in from outside jurisdictions for pay updates or payroll certifications – by entering them in the other title field they will be recognized and not cause title mismatch errors.

**Title Number**  
  Inactive

**Short Title:**

**Long Title:**

**Other Titles**

**Probation**

**Exam Series**

**Job Description**  

Source

Styles | Format | Font | Size | A | B | I | U | S | x | Insert placeholder

## Message Templates

All messages/letters you need available in the system. You can add a message by selecting the New Letter link. See [Correspondence](#) section for instructions on how to set message templates up.

ID	Name	Form	Last Update
	ADMISSION NOTICE	no	11/21/2025 09:45 AM
	Cert Cover Sheet	no	10/29/2025 10:26 AM
	EMPL - PROBATIONARY REPORT	yes	09/26/2023 10:37 AM
	Probation Form	yes	09/25/2024 02:06 PM
	Restriction Letter	no	10/30/2025 02:18 PM

## Perf Codes

All performance codes you need to track in the system. You can add an action by selecting the New History Action link. Actions are typically setup on launch of install. Checkboxes are available to further detail what the history action accomplishes. For example if

## FAQs

### Q. Our exam will not post to web. What is causing this?

One very common cause for this issue is that you are pasting minimum qualifications or job descriptions from a Word document. Please paste as plain text (using plain text tool in toolbar) to remove all extraneous code that Word tends to bring over with it. That code creates issues when trying to save or post to web.

### Q. When setting up a message template what are the differences between the form, bulk mailer and certification cover sheet checkboxes?

The form checkbox removes the letterhead so you can create a message with no letterhead or an actual form, the bulk mailer checkbox is only for very specific installs who use a print center at their facility (additional setup required), and the certification cover sheet checkbox is used if you want an additional letterhead setup for the certification sheet.

### Q. If a candidate applies to wrong exam can you move them?

Yes, you can.

### Q. What does “No apps allowed” in the applicant setup screen do?

It would prevent an applicant from submitting an application online if you chose to enable the feature.

### Q. Where do I setup a new roster action code?

Under Setup > Hist Acts. you can add or update any codes needed.

**Q. When I uncheck the subscribers notified box for an online post who receives the notification?**

These only re-send to people who signed up but have not received communication as of yet for this specific posting. It does not resend to all.

**Q. Do there need to be two parts Conditional Reason and Comment for Conditional setting?**

There is no requirement that it show on a letter or anything. It can be purely for internal tracking. The only required field is the conditional reason. The comment is optional.

**Q. “Waiting My Action” on dashboard - is this tailored to individual use?**

Yes. It is tailored specific to workflows anything waiting for a specific user’s response/approval will show there.

**Q. Is there an ability to merge two certification lists from two exams?**

If you edit each exam and give it the same "Exam Group" you can then certify them together. It will list the applicants from the oldest exam first and then the newer applicants. The Exam Group can be whatever you want as long as you enter the same group in both exams you want to merge.

**Q. Can an applicant who would like to reapply to jobs so they can update their experience to meet the qualifications do so?**

Yes, you would check Allow Multiple in the Online tab for exams or in the main screen for jobs. Then set the reapply days to what suits the situation – that is the amount of days an applicant needs to wait to be able to reapply. It will then allow multiple applications from the same individual for a specific post.

**Q. A user cannot see tabs/modules they need to access in HR Select, where do I find what is causing this?**

Check their role permissions. Most times it is due to a permission setting either setup that they can only see specific agencies and/or departments and then user is not assigned to a specific agency or department so nothing shows OR they are setup with a permission that states “Can Only” see a specific agency or department for a certain module when they should be able to see all.

**Q. I am not able to access the EXAM tab even though I have access to the HR Select system and all other tabs.**

You would have to remove the "The user can ONLY USE THE EXAM APPLICANT VIEW".

**Q. I need to establish a list and print the list out. However, when I go to print the list, none of the candidate's information appears on the list for me to print out.**

Check that the applications are marked as Approved. It will not print if you do not have any approved candidates. You need to update the ones that passed and are active as Approved.

**Q. When trying to create a RPC, the Applicant information does not pop up.**

Check to verify the application has an agency or department associated with it. The application would have to have the agency and department of the RPC. If not, anybody would be able to see any applicant.

**Q. Is there a way for someone to submit a general application through the portal that isn't tied to an Exam or a Job posting?**

You would need to create a job posting called "General Application". All applications have to come in tied to either an exam or job posting.

**Q. What is the box for that you check private yes or no under documents?**

If you are sending a packet of applications or a certification and choose to include documents the ones marked "private" are not sent.

**Q. I have no applicants entered in the system for the Director of Facilities exam which means I cannot score any either, how do get them entered?**

You must download the original applicants.csv from the state and import that first. That is done by attaching it as a document under the exam document tab and then you will have an option to import the applicants. Once that is done you can then import the scores.

**Q. Is there a particular procedure for extending eligible lists?**

No. You can just update the expiration date and the system will track the extension as part of its audit.

**Q. We have updated the salary ranges for CSEA employees – where do I change the table for those updates?**

Go to Setup > Grades to update the table.

**Q. How do we populate existing performance waivers? How is a WAIVER created? Is it always based on data being entered into Perf Tests within the candidate Master?**

Performance waivers may be based on Perf tests in the candidate master or tests on prior exams that have not expired. It is a completely automatic process. So if you have a physical agility that is good for 2 years on file in either location and a new eligible list you are on has

the same requirement the system can automatically apply the waiver based on the previous results.

**Q. The carbon copy (CC) field in a message with multiple recipients does not seem to be working correctly – can you provide insight?**

Do not put any spaces between recipients in addition to a comma. There should not be a space - only a comma separating emails.

**Q. The phase results token does not populate any result in the applicant message.**

You must use the advanced filters at top of screen when creating the message to select the phase and/or phase dates and/or phase locations you want results to be displayed for - since an exam can have more than one phase, date or location.

**Q. Can I add a hire date directly into an employee record instead of using a history action?**

If you would like the hire date to be whatever you enter on the employee screen and not calculated from the history make sure to check the checkbox next to the hire date in the employee master screen.

**Q. There are no candidates available for scheduling in the phase scheduling tab – how do I get candidates to appear.**

The eligible list must be established to be able to schedule phases and a location site must be loaded into the phase schedule tab. If the list has already been established just click print list, the candidates will appear on the phase scheduling tab.