DISCOVER EGOV CIVIL SERVICE SOFTWARE

HR SELECT

Civil Service Software

HR SELECT

Administrative Manual

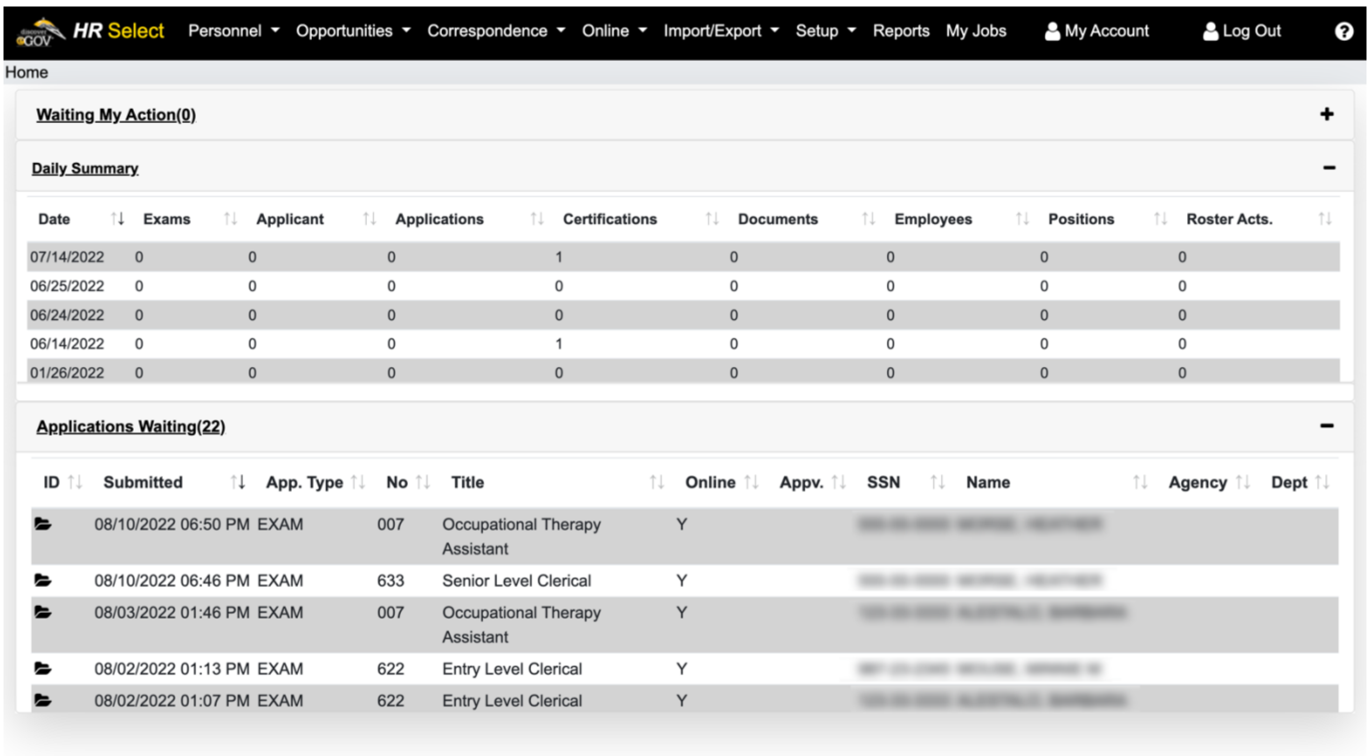
Table of Contents

Chapter

1

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.



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.

Chapter

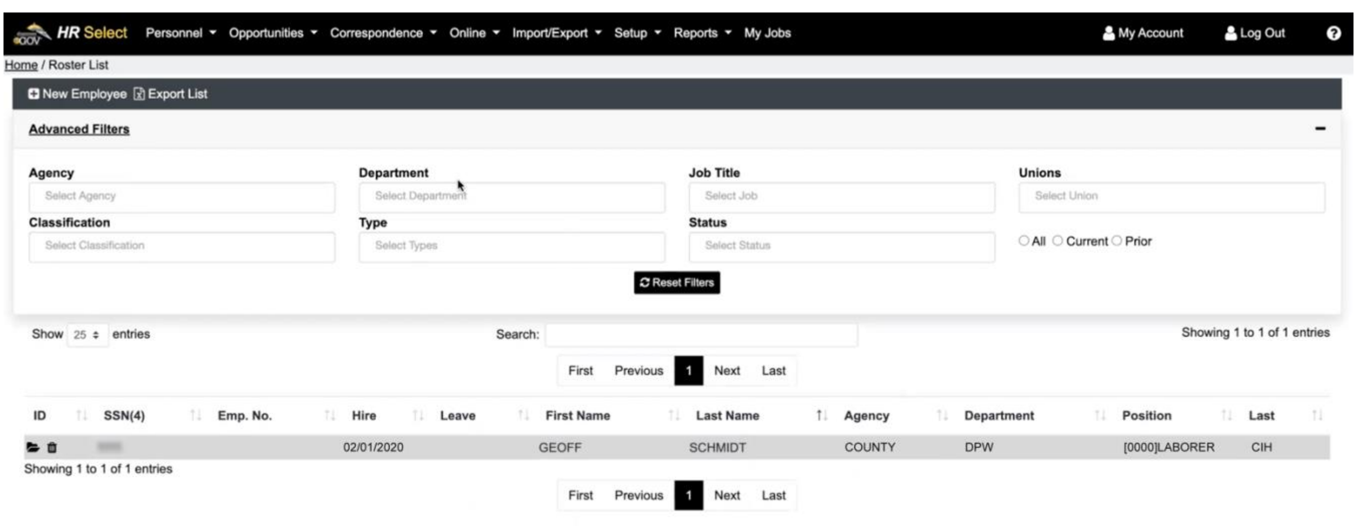
2

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.

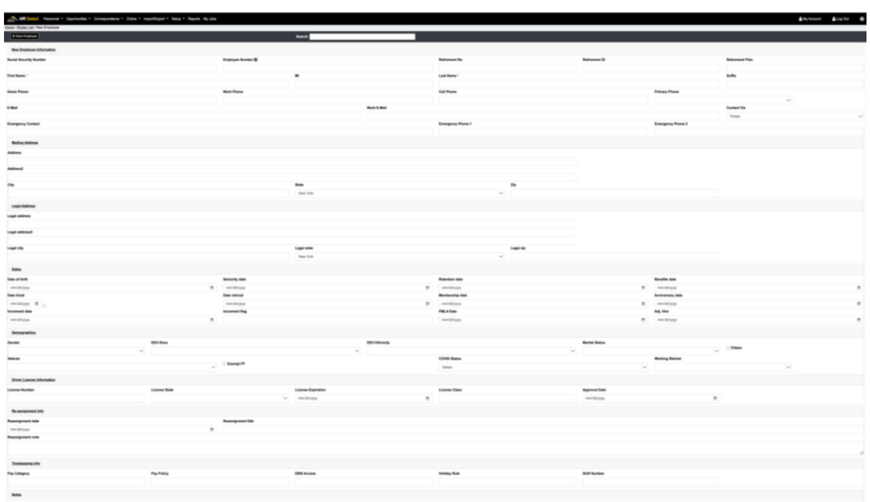


- **Export List** - The Export Button will export an Excel Workbook of the Employees that are currently selected according to your search and filter criteria.

- **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

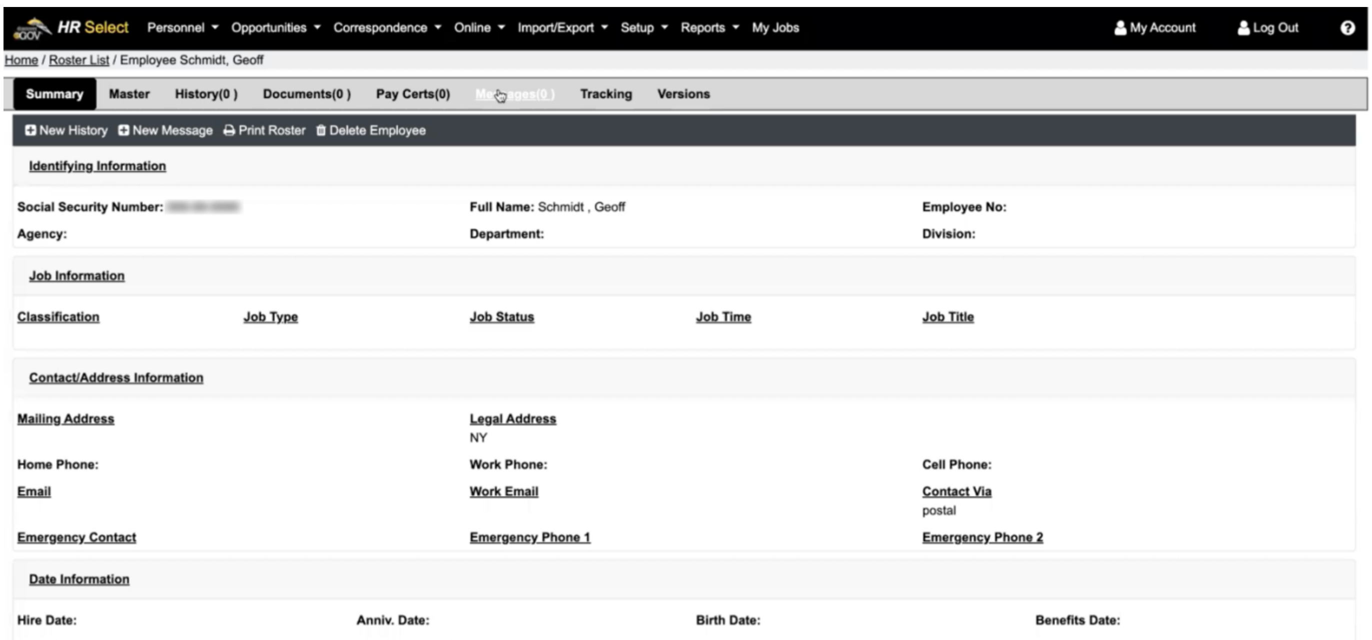
Driver's License – Fields for Driver's License information

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.



<u>Menu Bar</u>

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

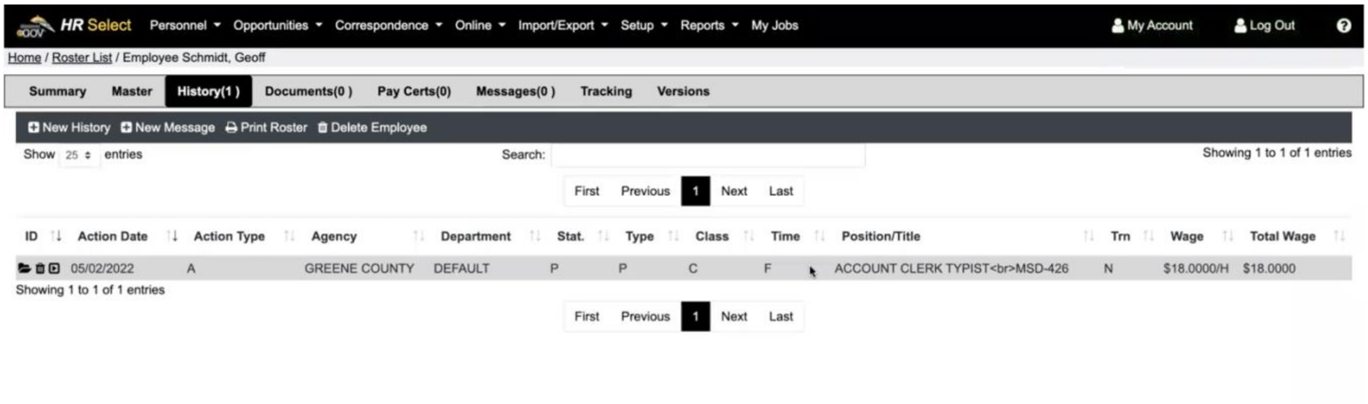
Delete Employee – Delete the employee record

Roster – Employee Master Tab

The master tab displays all information for that employee.

Roster – Employee History Tab

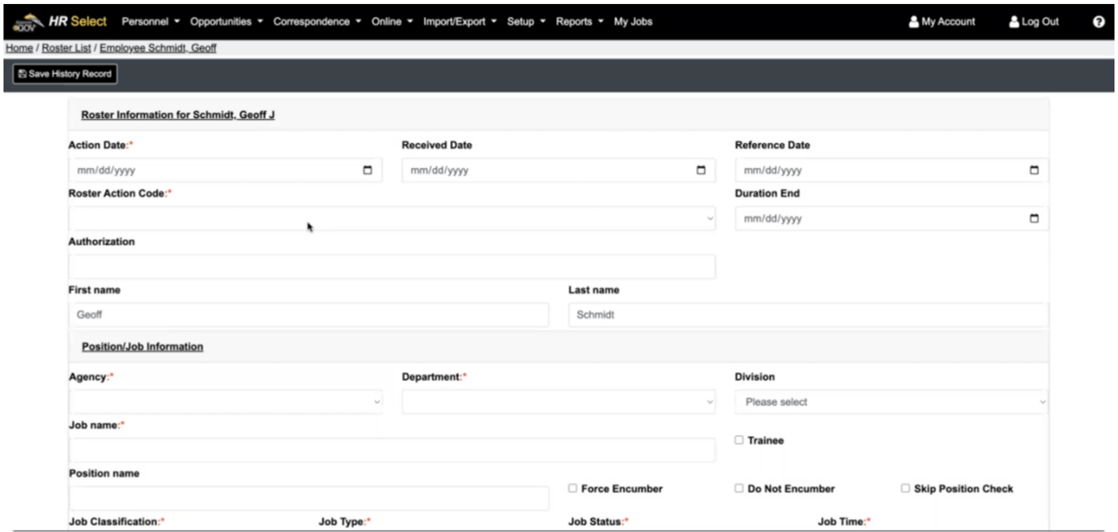
The history tab displays all roster actions and history for that employee.



- **<u>Action</u>** - 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

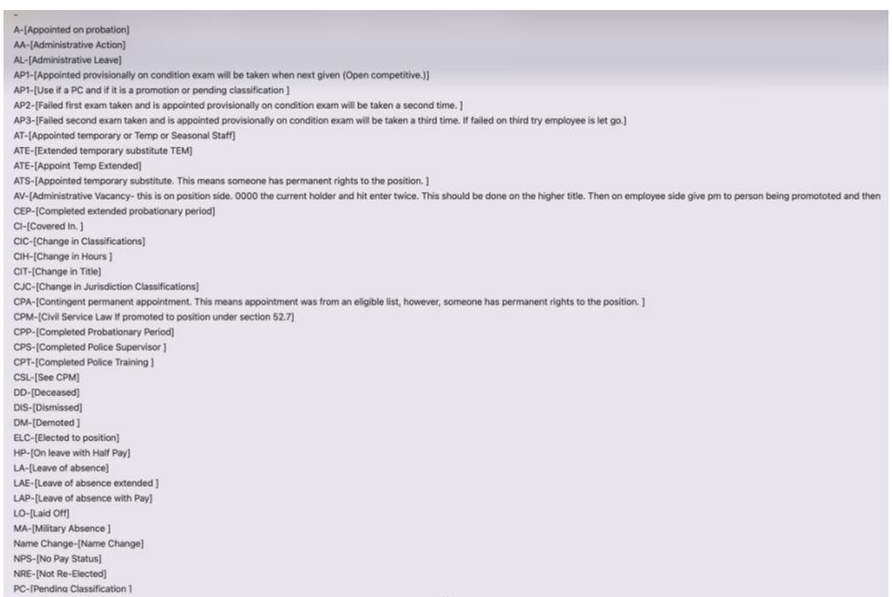
Roster – New History Action

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



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.)



- **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 alotments, 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

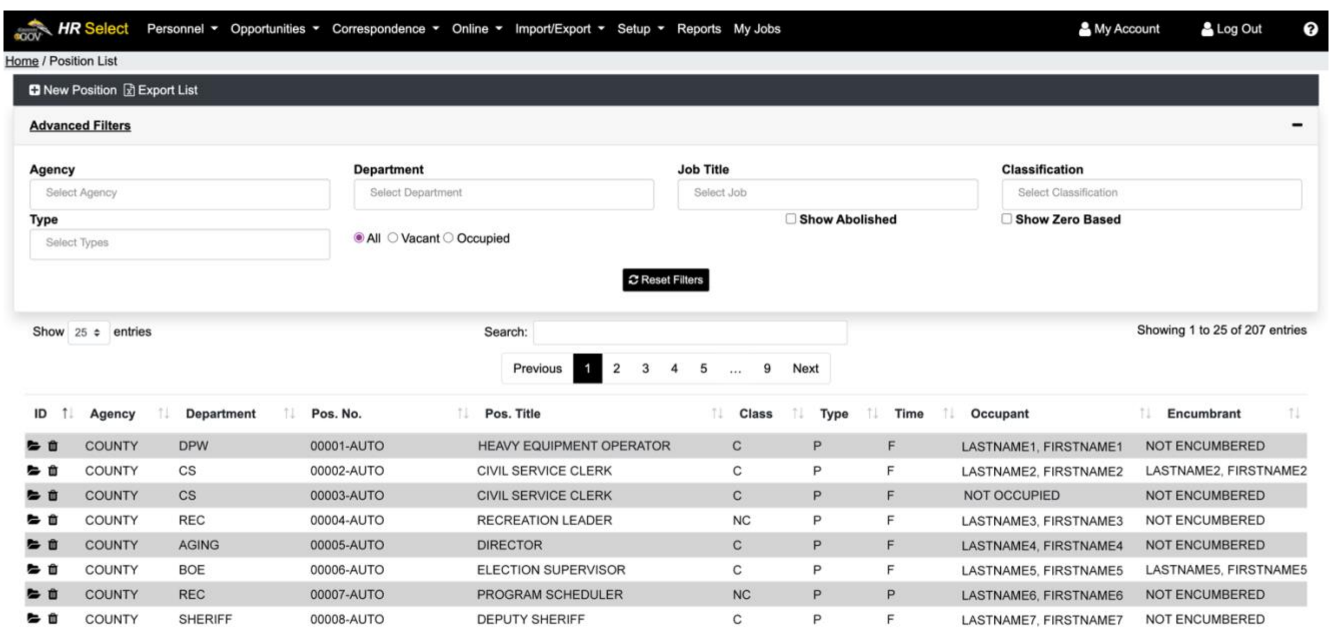
Messages can be created to be emailed or mailed and can be tracked in delivery history.

- **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.



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

<u>**Menu Bar**</u>

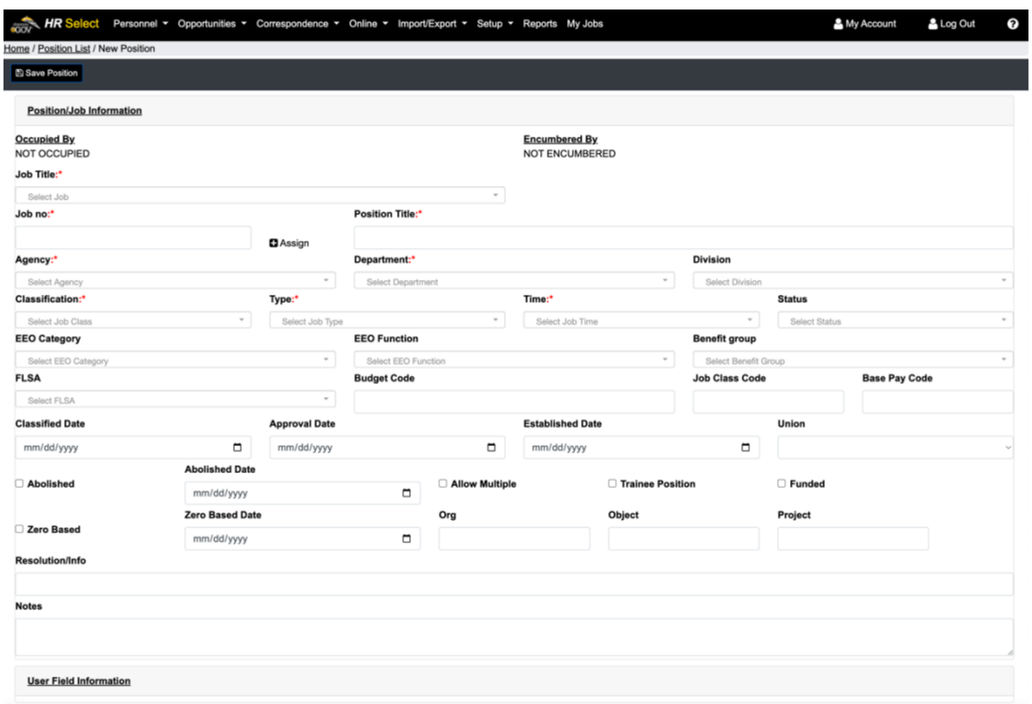
New Position – Creates a new position

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.



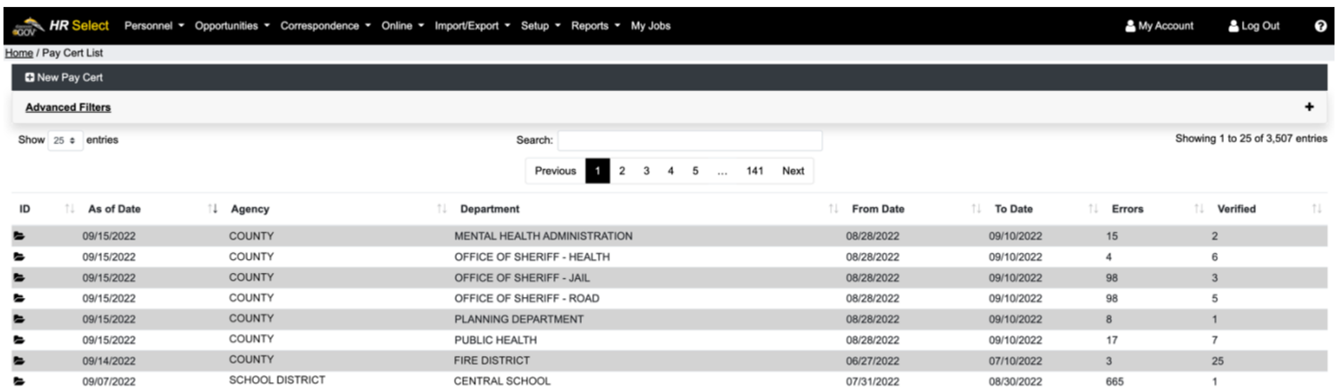
- **Job Title** – Will provide a dropdown of titles already setup in system
- **Job No** – Can be setup to auto program or manually enter
- **Position Title** – Provide title of position

- **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.



<u>**Menu Bar**</u>

Process – Start the certification process

Delete – Delete the certification

Print Report – Print the certification report

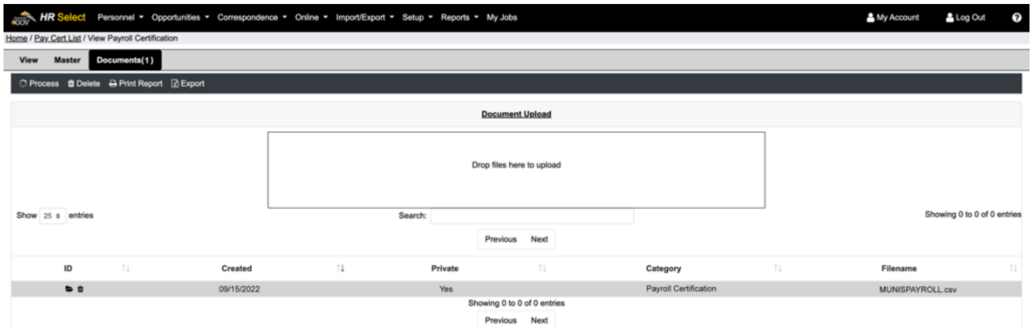
Export – Export the certification to excel spreadsheet

Payroll Certification – with CSV file

To use a CSV file:

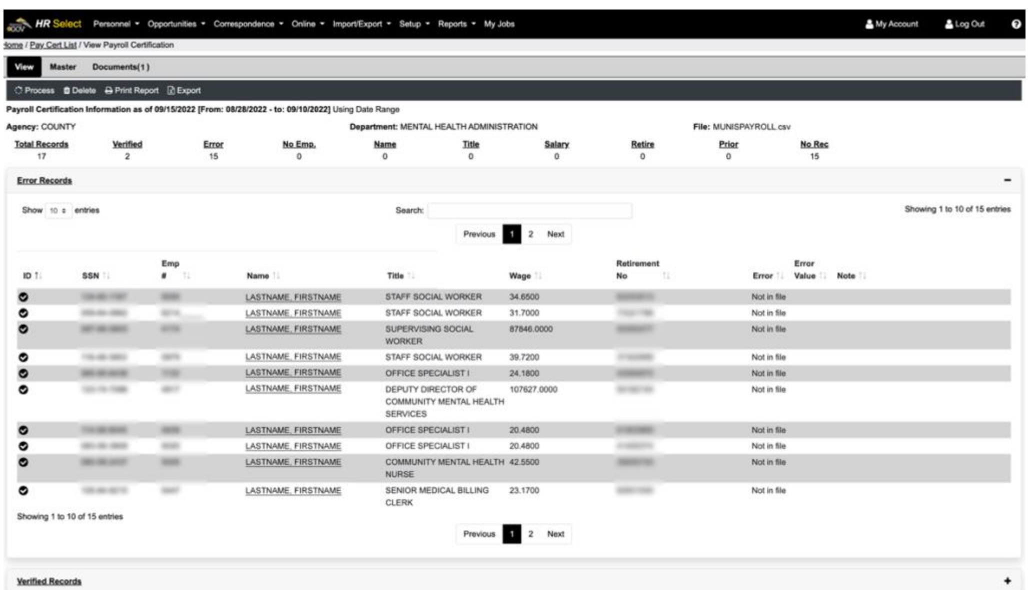
- Go to Personnel > Payroll Certifications
- Click on New Pay Cert in upper left corner
- Fill in the information for the Payroll Certification and Save Certification
- Once certification is setup you will then click on the folder icon to open the new certification

- 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.

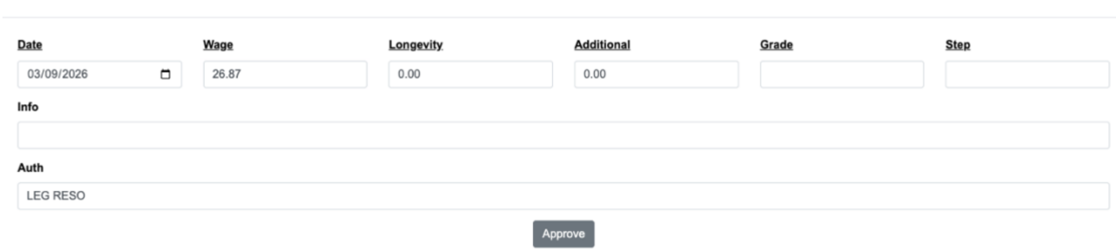
To use the CSV file:

- 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

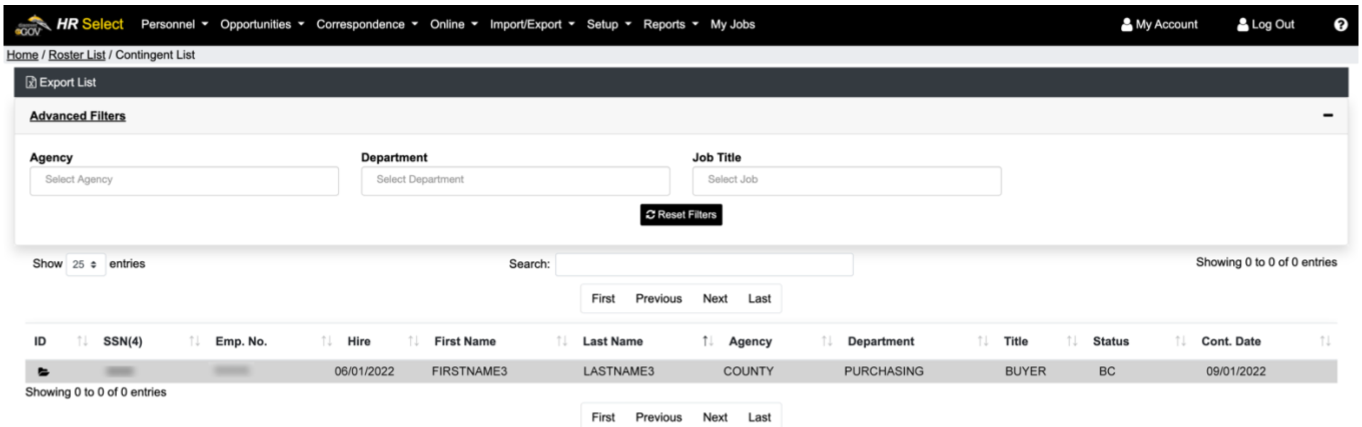
Any error records can be fixed at that time and new file uploaded if necessary and process rerun.

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.



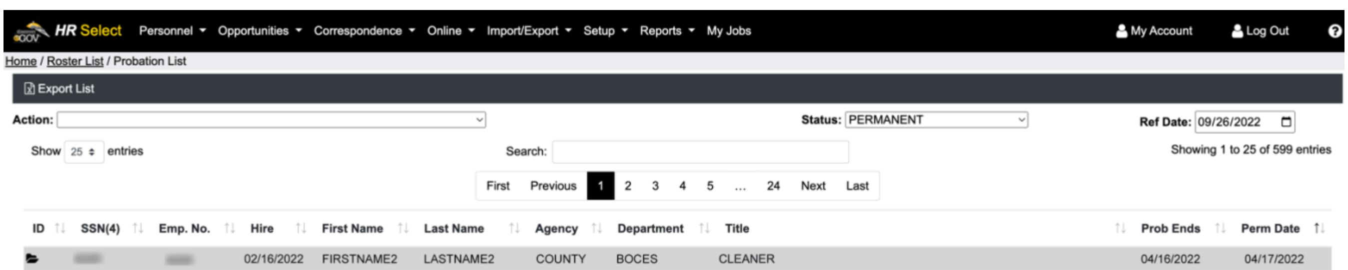
Contingent Employees

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.



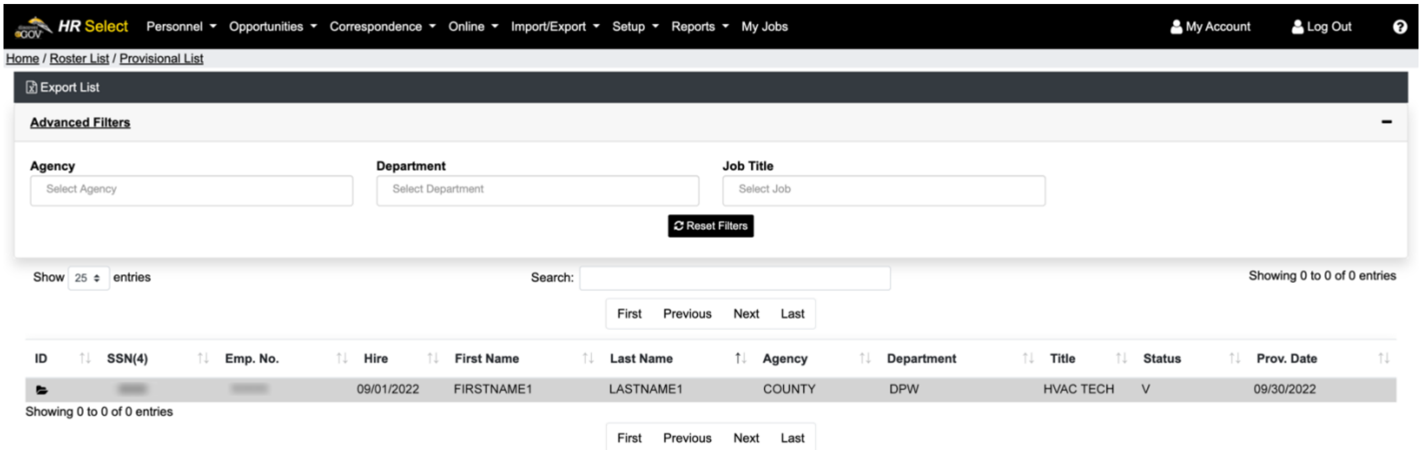
Probation Employees

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



Provisional Employees

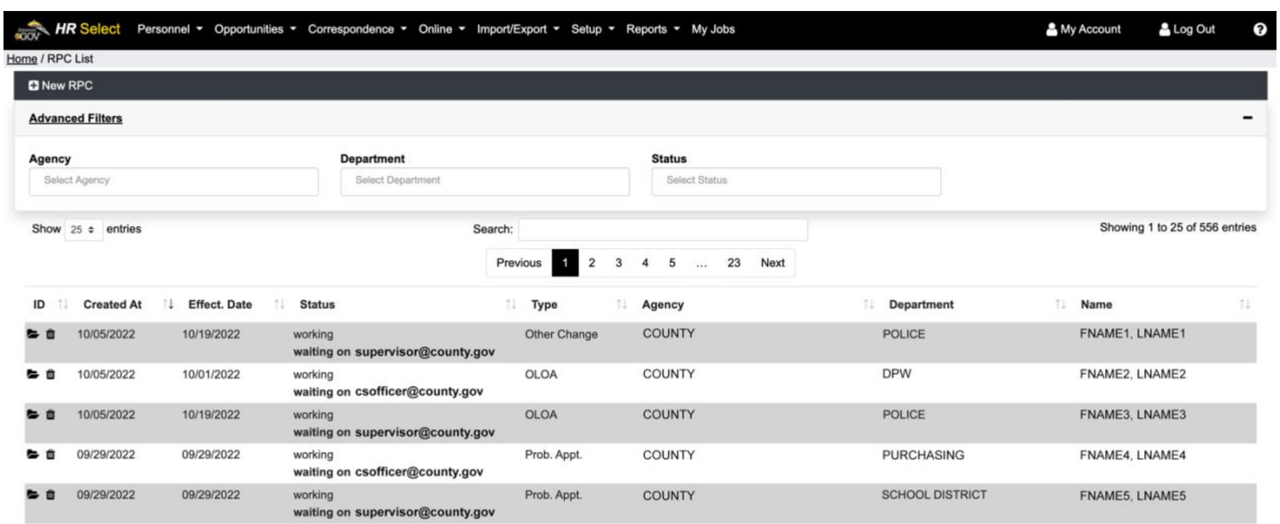
Under Personnel > Provisional you will find an overview listing all provisional employees. Advanced filters allow you to filter your search by Agency, Department or Title. The open folder icon allows you to directly access that employee record.



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.



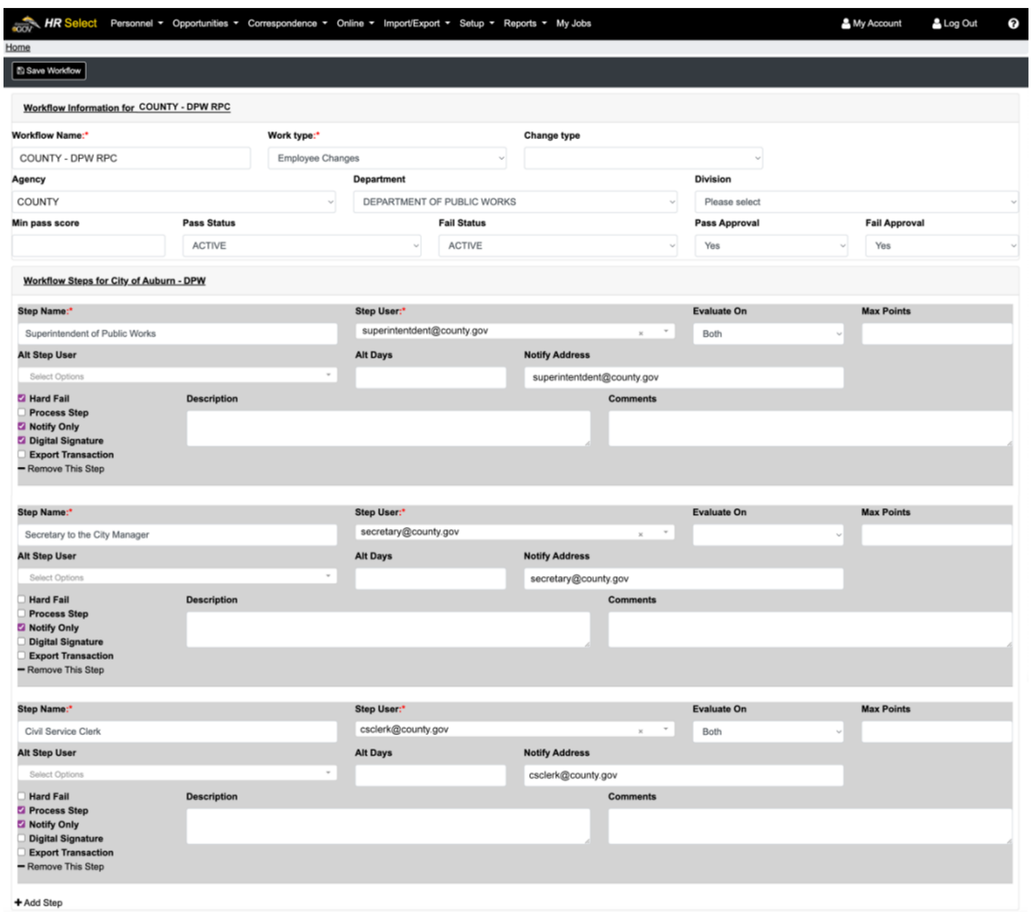
- **Actions -** "Folder icon" is used for viewing RPC details and the “trashcan icon” deletes the RPC.
- **Created at** – The date the RPC was created
- **Effect. Date** – The date the change becomes effective
- **Status** - The step the RPC is currently at and whom it is waiting on
- **Type** – The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



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.

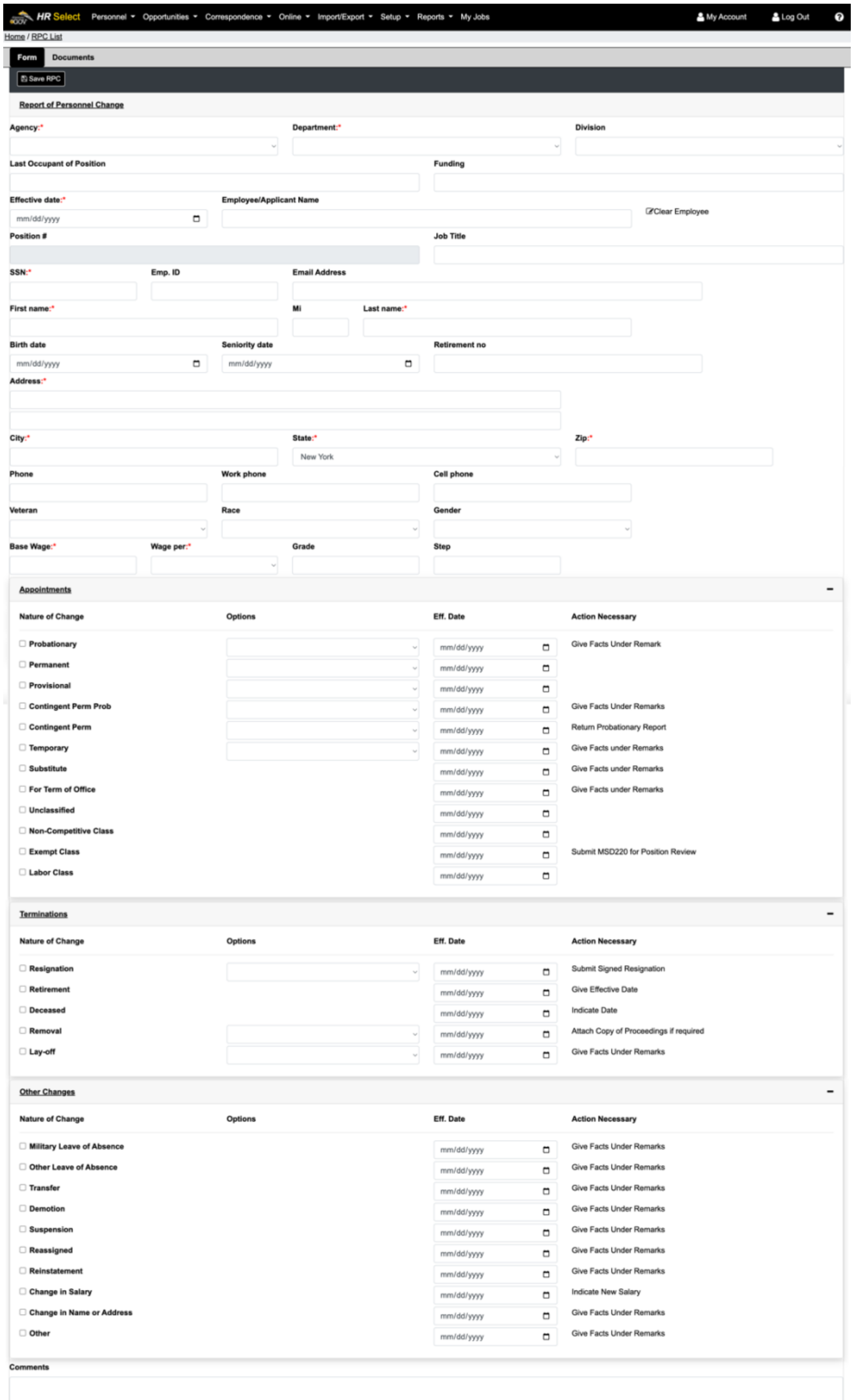
Person inputting RPC can search for employee name but it is in the confines of the agency and the department specified. Once name is found it will prefill information.

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:* mm/dd/yyyy | Employee/Applicant Name | Clear Employee

Position # | Job Title

SSN:* | Emp. ID | Email Address

First name:* | Mi | Last name:*

Birth date mm/dd/yyyy | Seniority date mm/dd/yyyy | Retirement no

Address:*

City:* | State:* New York | Zip:*

Phone | Work phone | Cell phone

Veteran | Race | Gender

Base Wage:* | Wage per:* | Grade | Step

Appointments

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

Terminations

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

Other Changes

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

Comments

Sample RPC form

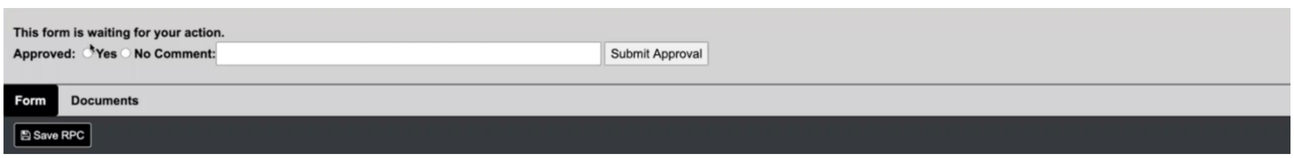
RPC – RPC Workflow Process

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:

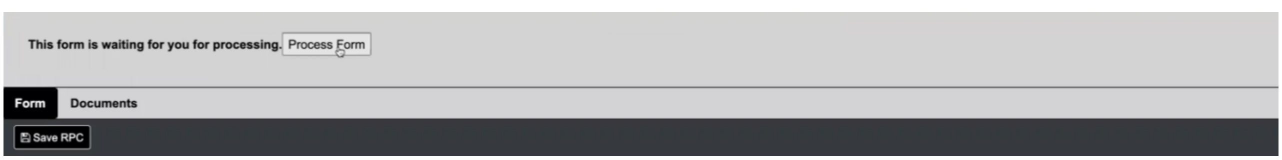
User will see input bar at top of the RPC, asking if it is approved and comments. If approved, they check yes and submit approval and RPC moves to next step based on workflow setup.

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 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.



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.

Chapter

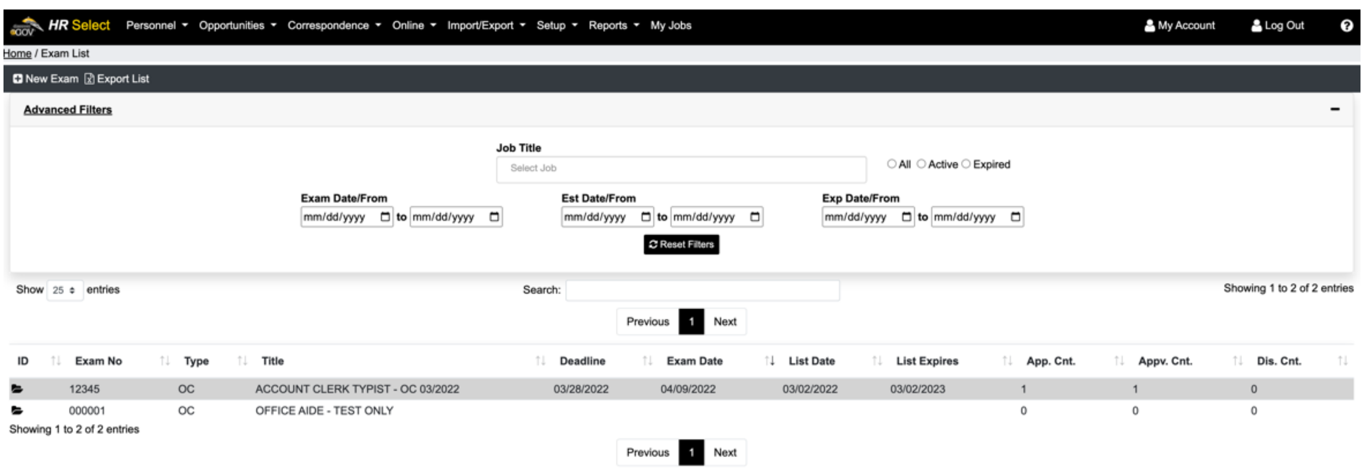
3

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.

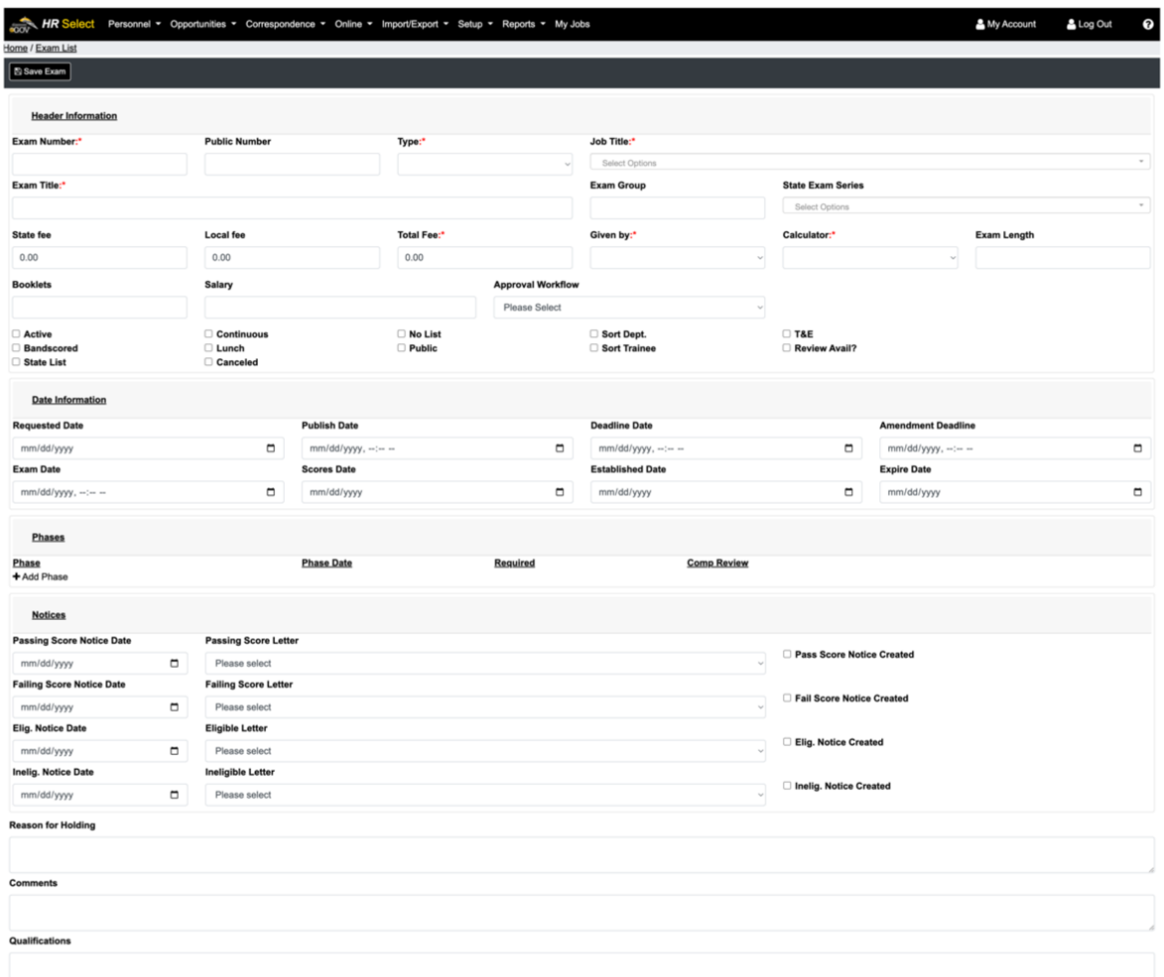


- <u>**Action**</u> - Use the folder icon to open an **EXISTING** Exam Record
- **Exam No** - The number assigned to the Exam
- **Type** - OC - Open Competitive, PROM – Promotional, CR – Continuous Recruitment
- **Title** - The title of the Exam. This can be the job title or a custom title you assign 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.

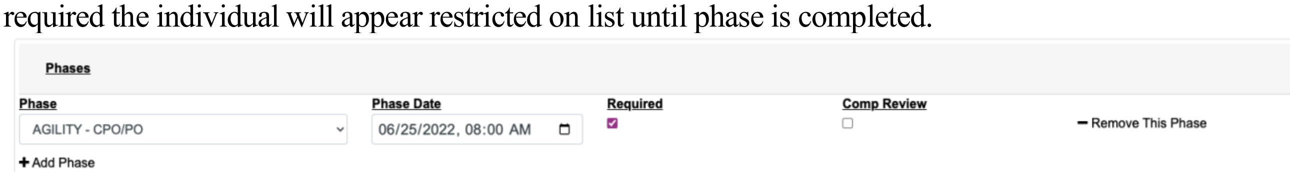


- **Exam No** - The state assigned exam number

- **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.



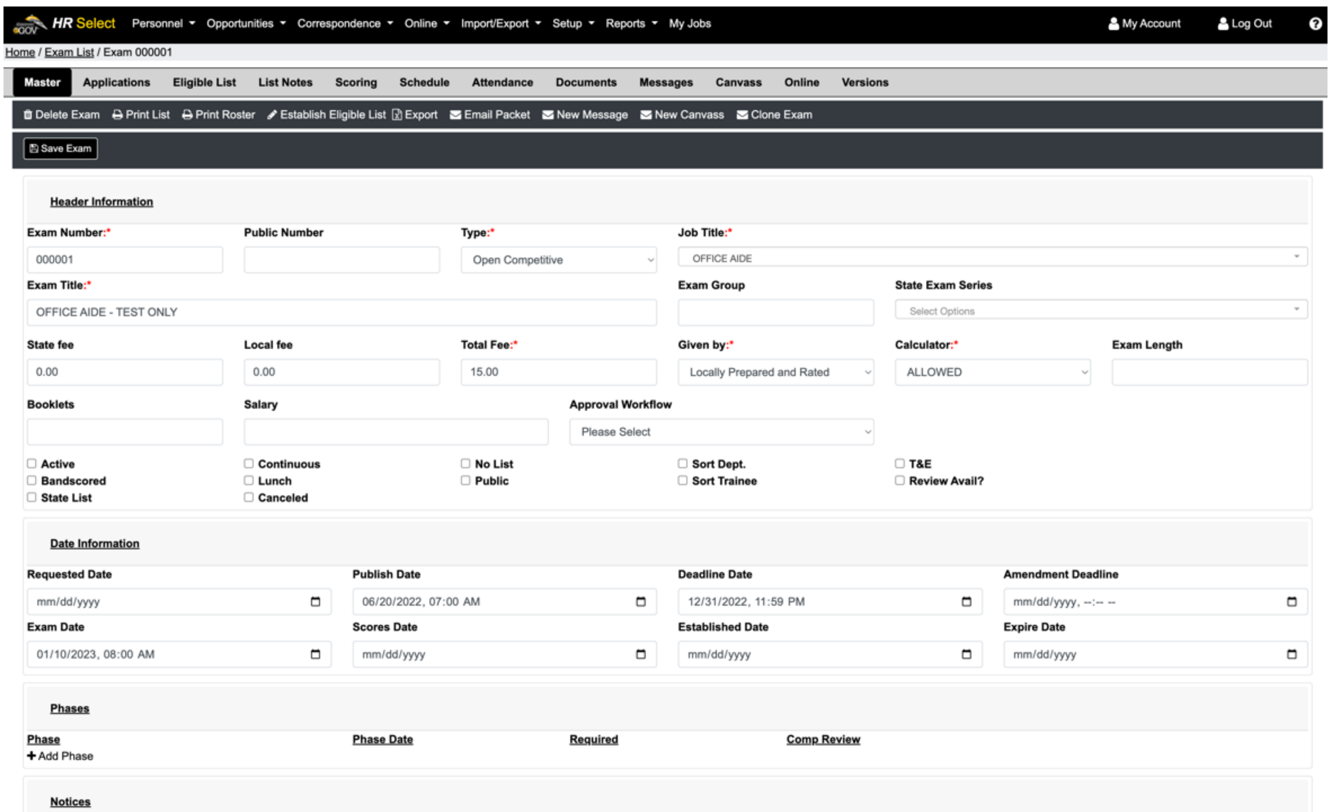
- **Notices** – Setup of dates and letter templates for important notices specific to the exam.
- **Reason for Holding** – Comments on why exam was held

- **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.



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.

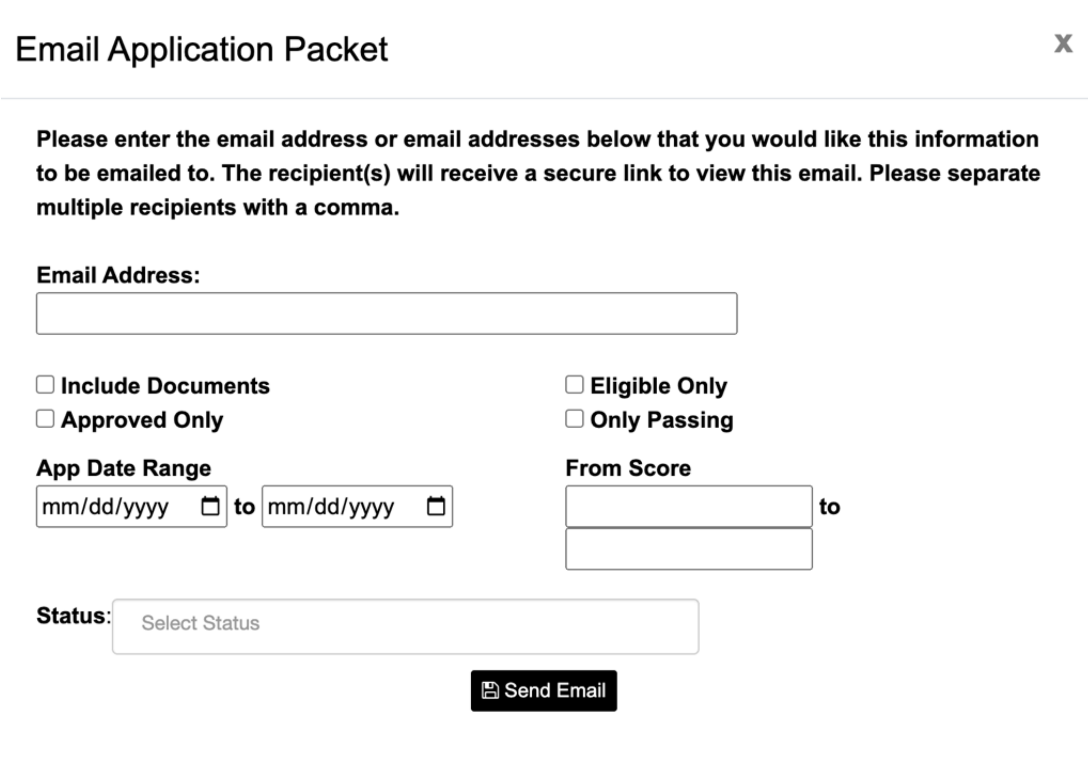
Print List - Print the CURRENT Eligible List for this Exam

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.



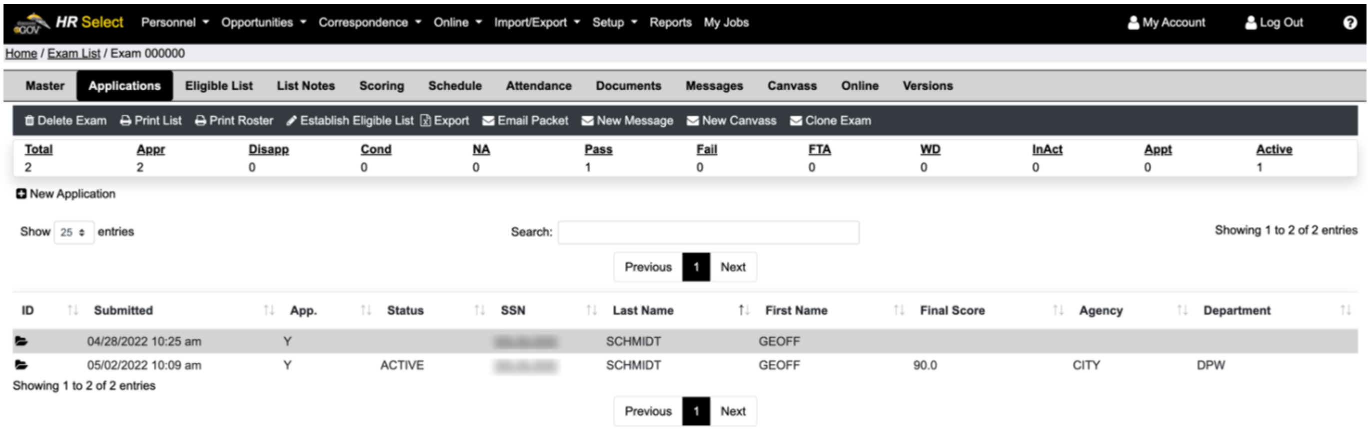
New Message - Create new messages for exam (viewable under messages tab)

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.



Applicant Statistics

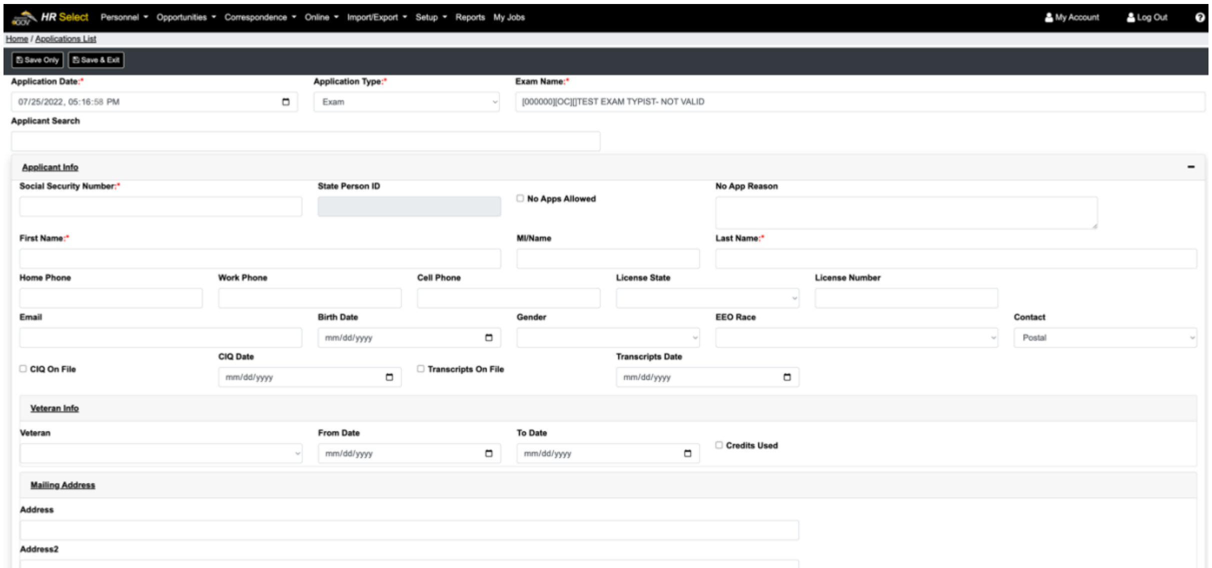
- **Total** - The total number of applicants applying for this exam
- **Appr** - The total number of Approved Applicants for this exam
- **Disapp** - The total number of Applicants NOT APPROVED for this exam
- **Cond** - The total number of Applicants CONDITIONALLY APPROVED for this exam
- **NA - No 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.

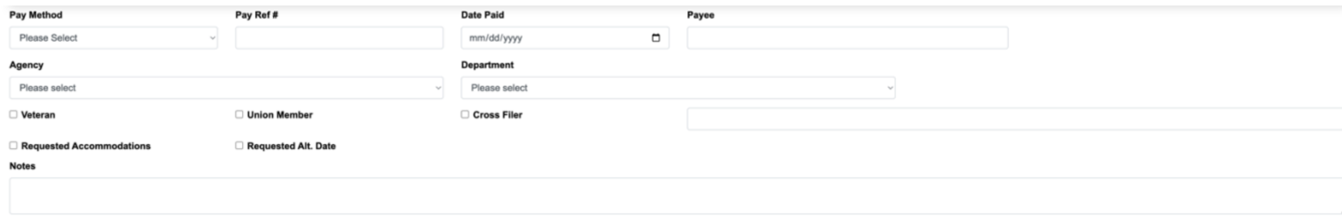
You will have one applicant record per social security number. If you try to add a duplicate social you will not be able to save it – an error will alert you that number is already used.



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



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.

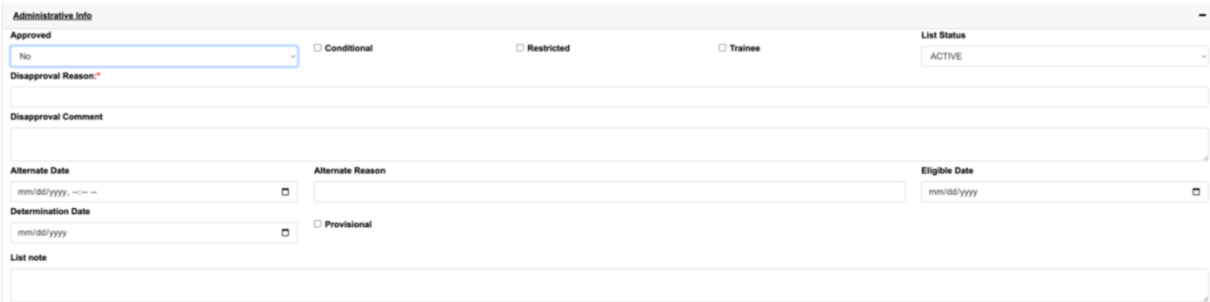
Checkboxes:

- **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:

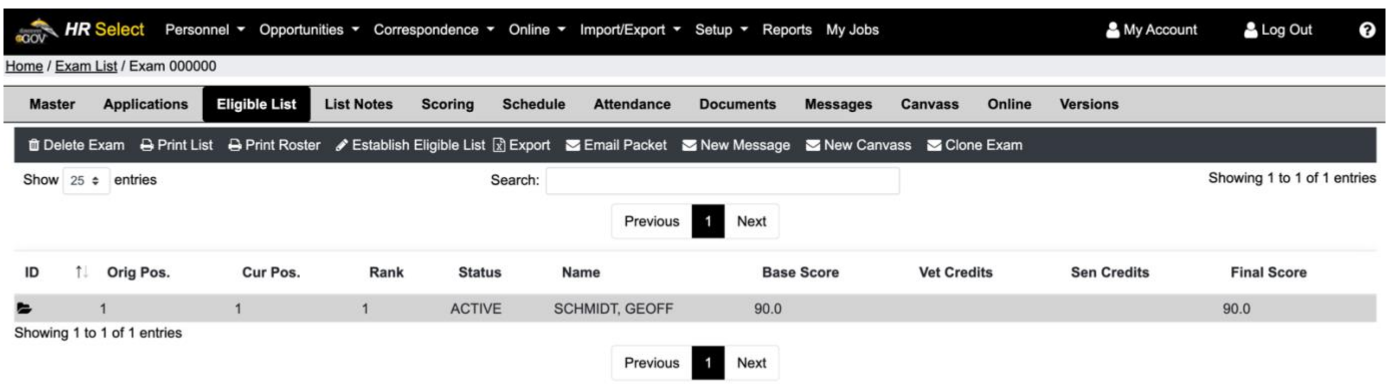
- **Alternate Date** - if an alt date has been approved you can fill in alt date of test and reason for it.
- **Eligible Date** - goes hand in hand with restricted checkbox, you can put the date in that they do become eligible and if a list is established they will then appear on the list on that date.
- **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.



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.



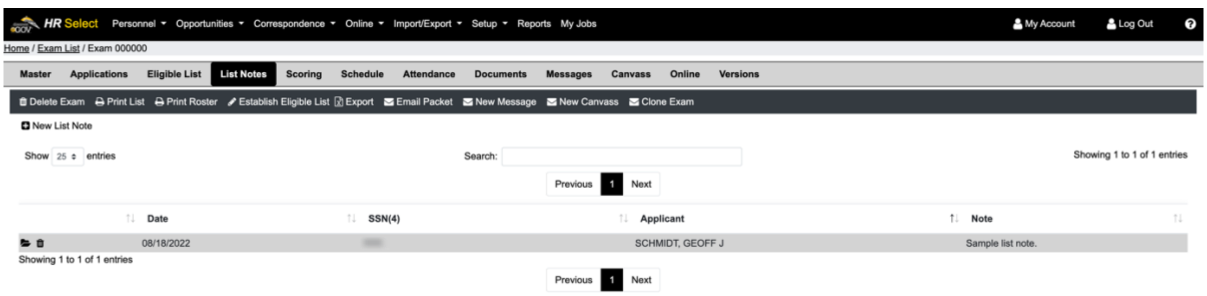
You may search for particular candidates using the Search Box.

- **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

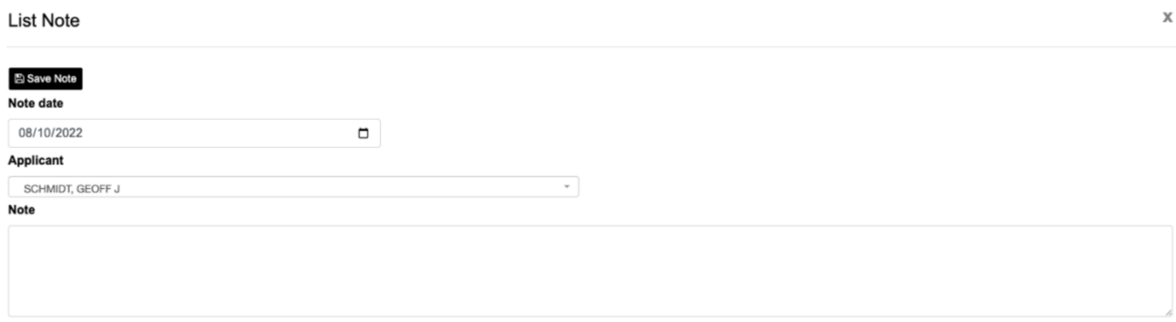
Exams – List Notes

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



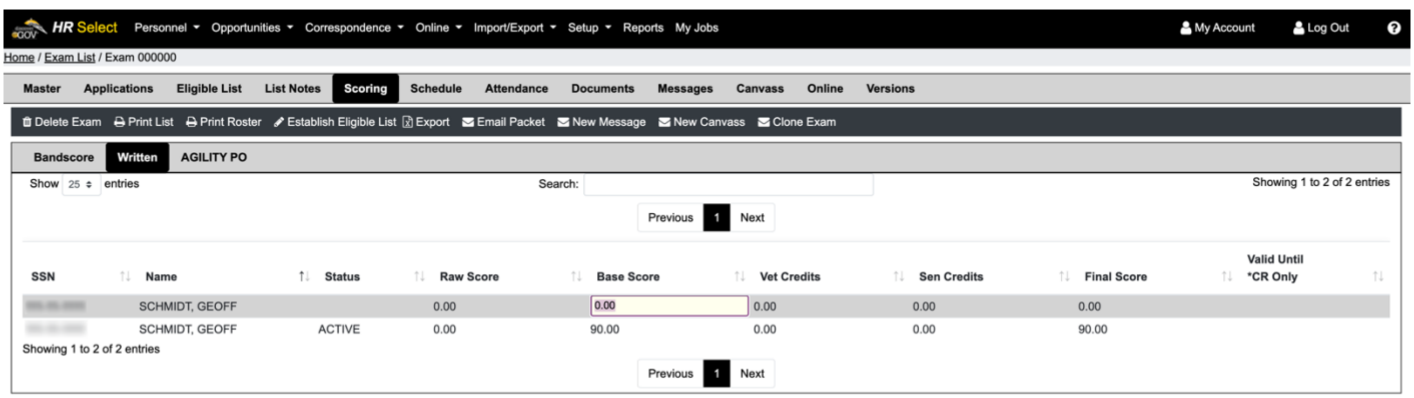
- **Actions** – The folder icon opens the note, the trashcan icon deletes the note, search bar to search notes, new list note to add notes
- **Date** - The date you want the list note to appear
- **SSN(4)** - The last four digits of Social Security Number of the Applicant
- **Applicant** - The Full Name 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.



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.



- **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.

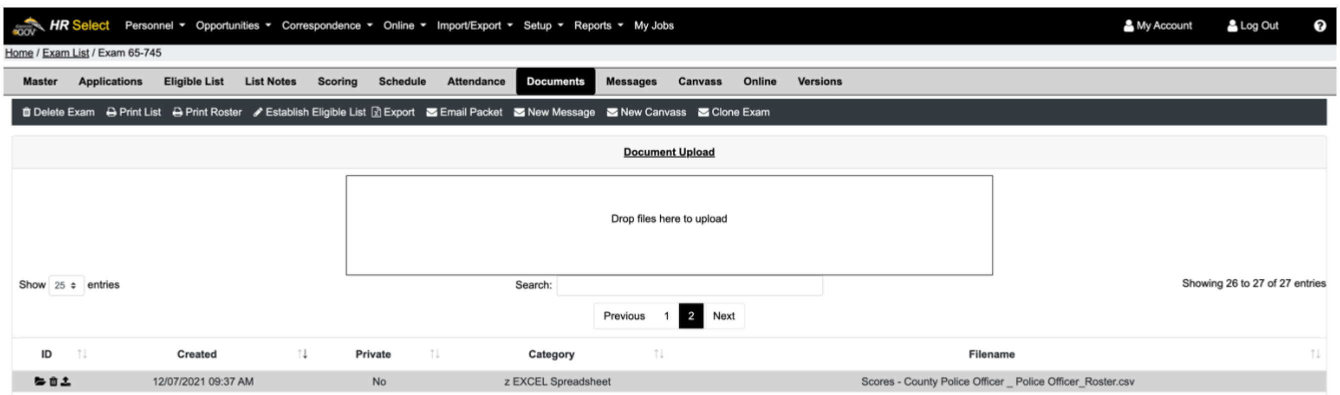
- **Vet Credits** - Veterans Credits

- **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.



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.

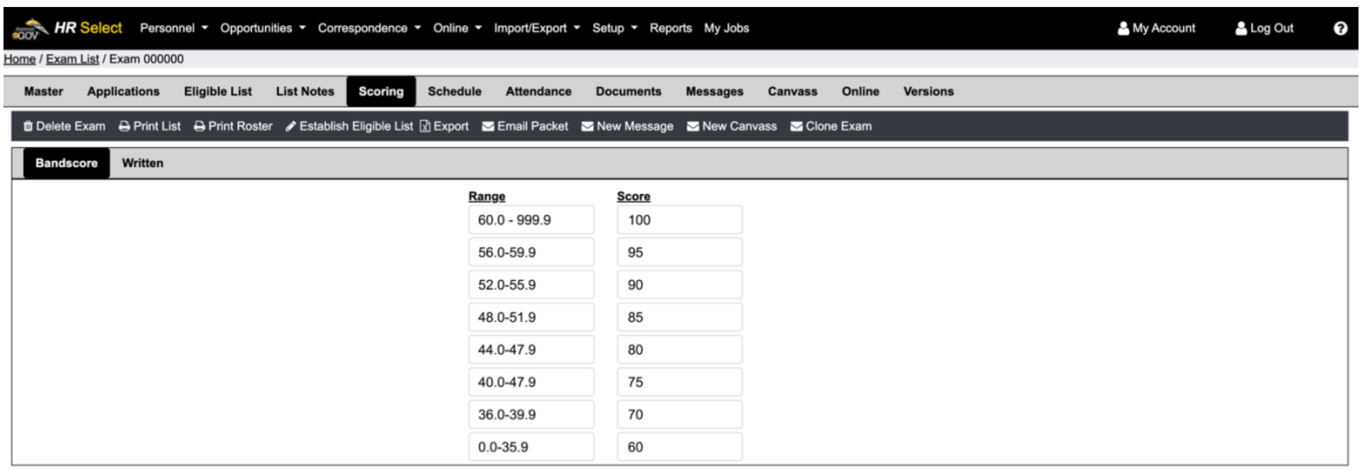
Anybody with a Passing Grade will be added to the system as Approved and with a Status that has the code of 'A' under Setup > App.Status. In our case, 'Active'. The ones with a Failing Grade will be added to the system as Approved and with a Status that has the code of 'F' under Setup > App. Status.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

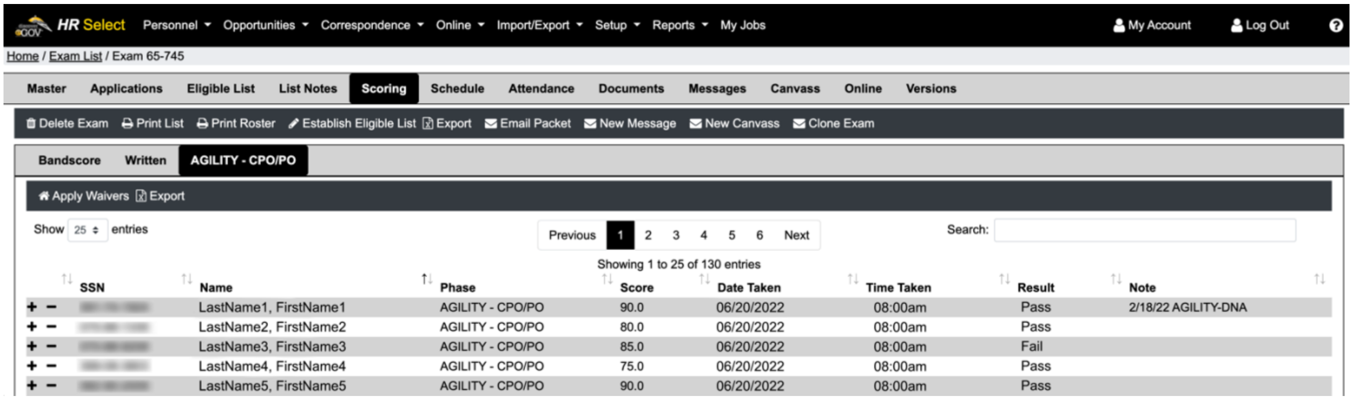
If you have checked bandscore on the setup of the exam you will find a bandscore sub-tab on the scoring screen. You can fill in the range and score and it will be applied on your written scoring screen.



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

Exams – Scoring – Phases

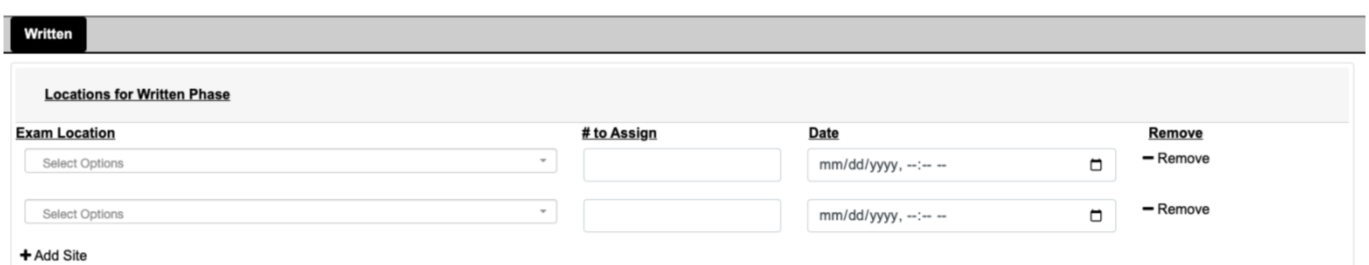
If a phase (performance test) is setup for an exam you will find a sub-tab for that test on the scoring tab.



- **<u>Actions</u>** - 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

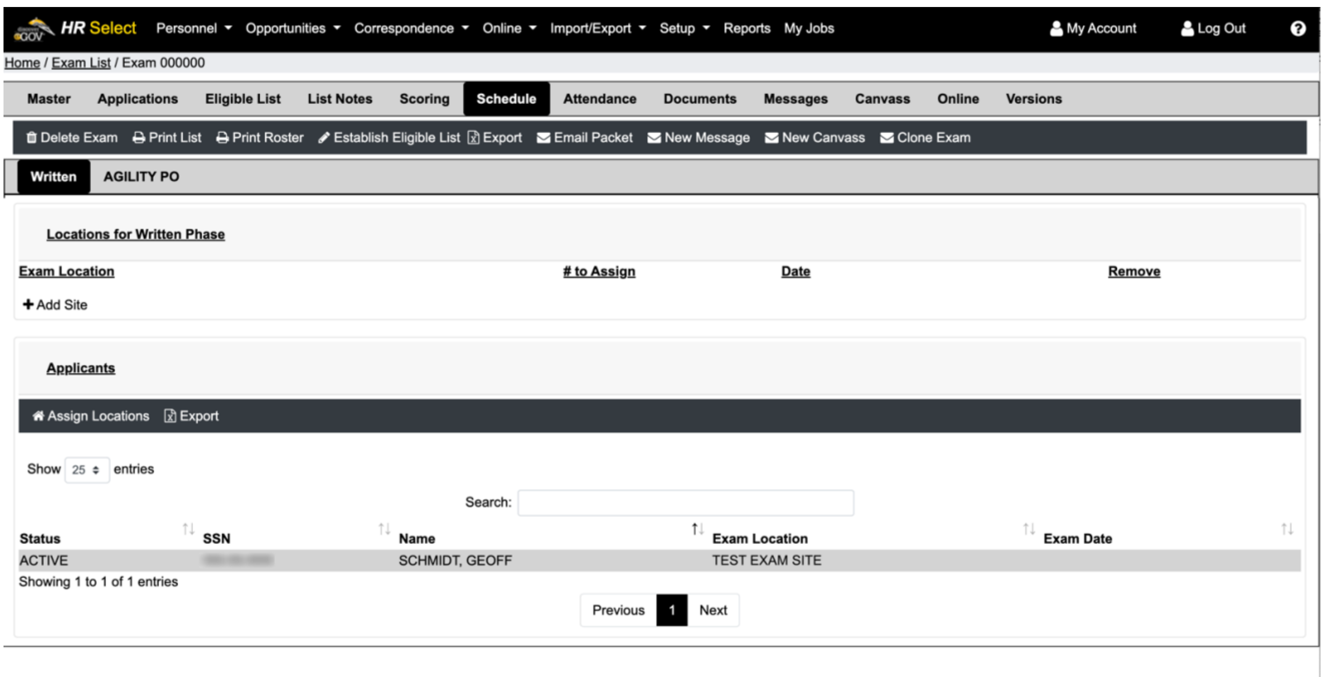
Exams – Schedule

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.



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



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)

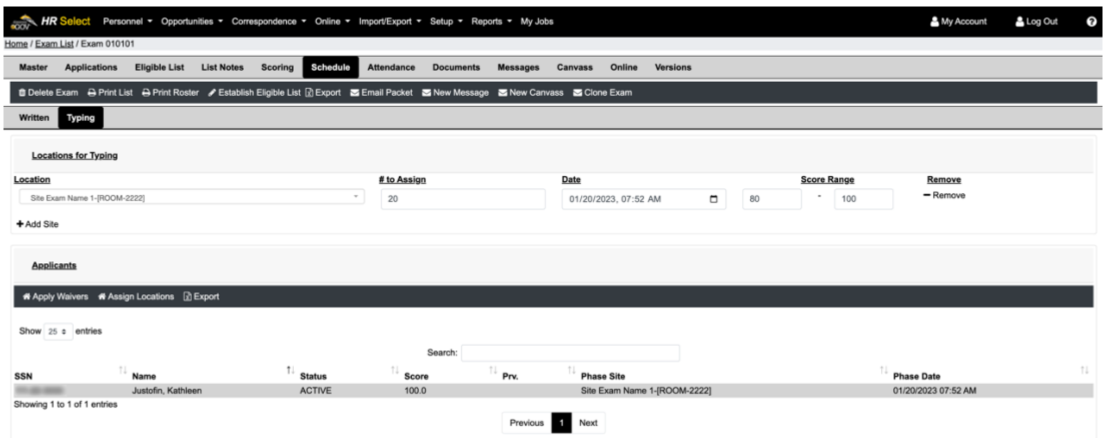
To allow the system to automatically assign locations click "assign locations" and the system will then assign sites to applicants using capacities and any multiple exam information on file.

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

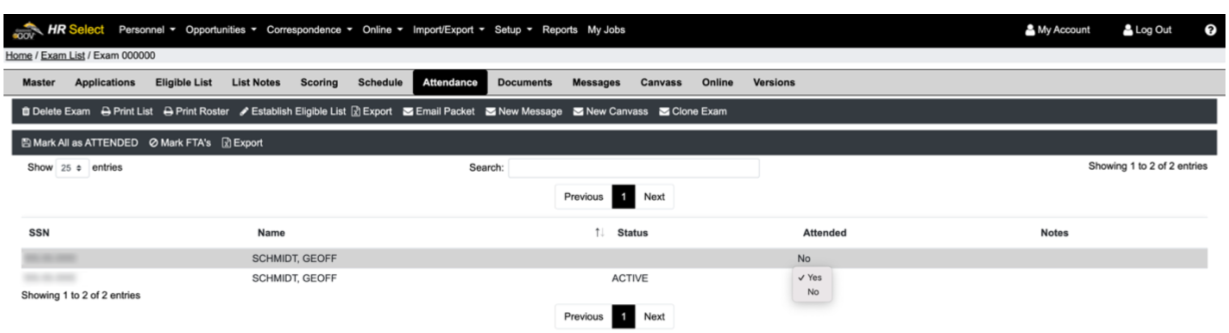
The schedule tab will also allow you to schedule and assign locations for each exam phases. Each phase will have its own subtab. Exam sites should first be setup under Setup > Exam Sites – once that is done then they are available as an exam location option. **For applicants to be available for scheduling 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).



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.

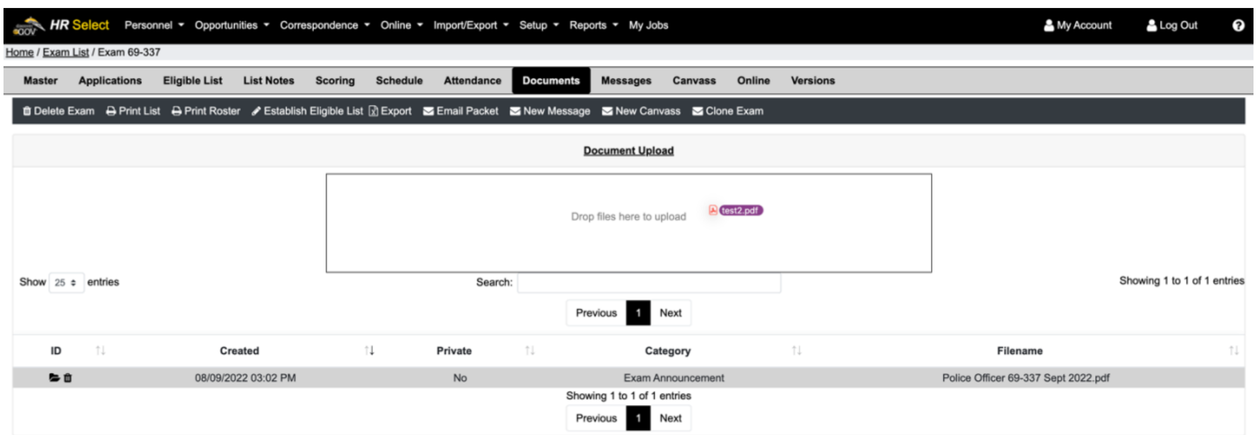


Exams – Documents

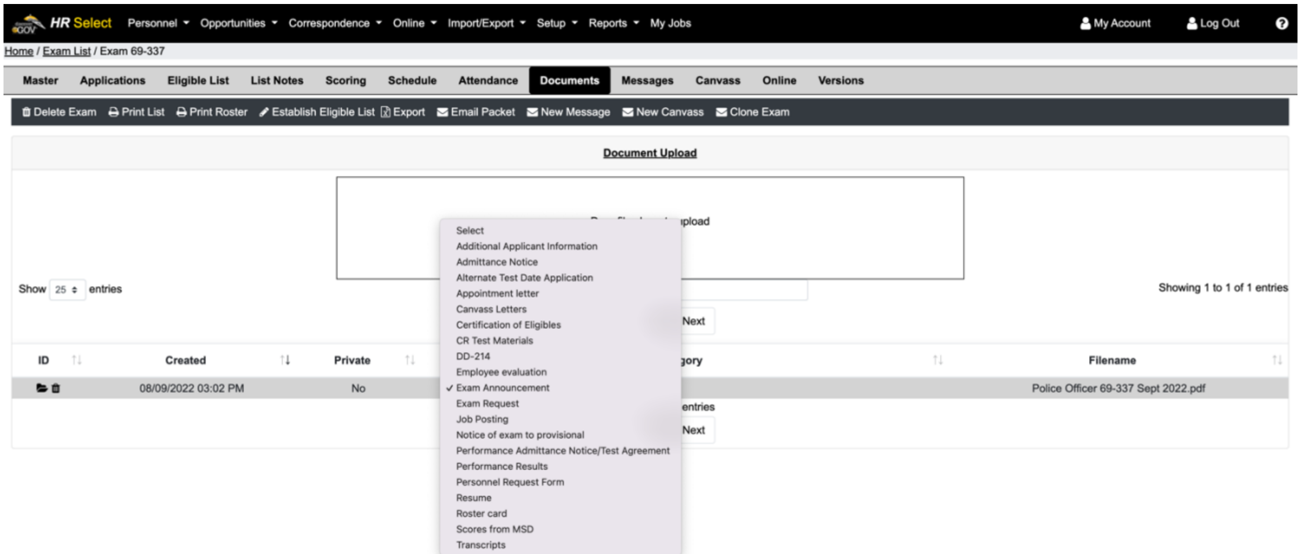
The documents tab allows you to attach documents to this exam. Any number of documents may be attached and categorized on this exam. To upload a document you can drag a file from your desktop into the area marked "Drop files here to upload" or you can use the “Document Upload” link to select a file from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

- **<u>Actions</u>** - 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

<u>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.</u>



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.

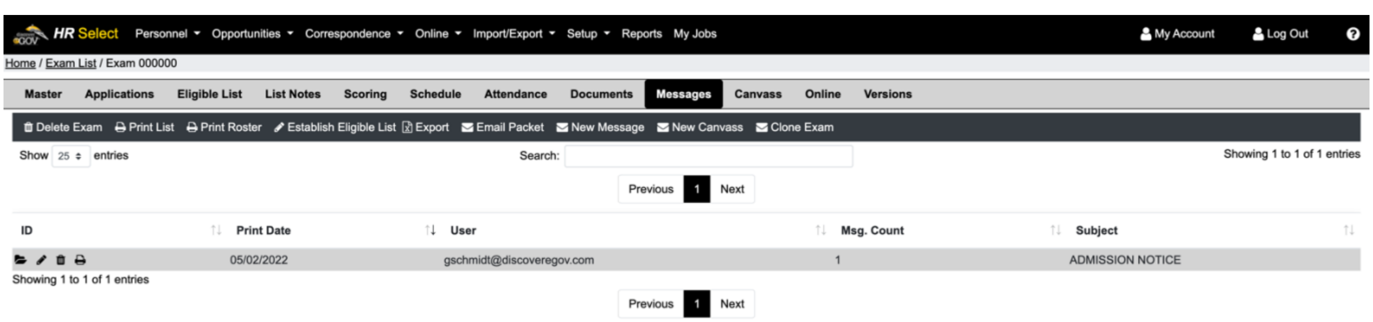


Exams – Messages

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.

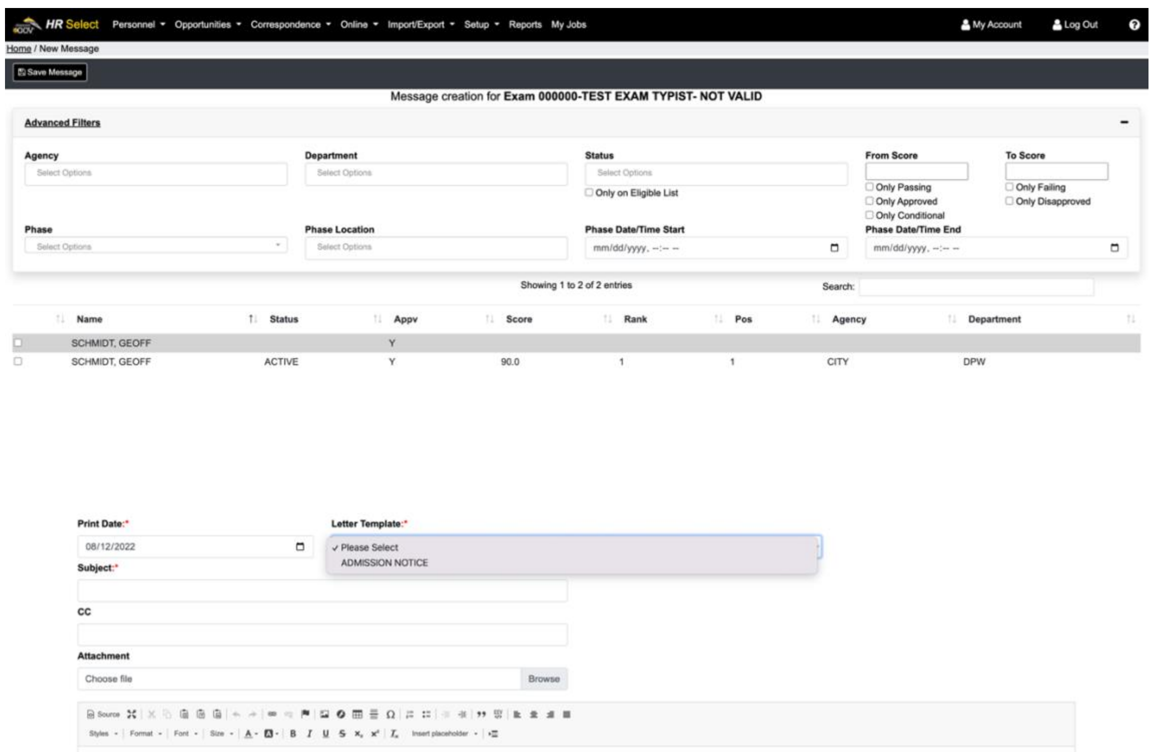
- **<u>Actions</u> -** "Folder icon" is used for viewing a previously created batch of messages, "pencil icon" is for editing, "trashcan icon" deletes the message and the "printer icon" prints the messages.
- **Print Date** - The actual print date of the message. This is specified when you create a batch 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.



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

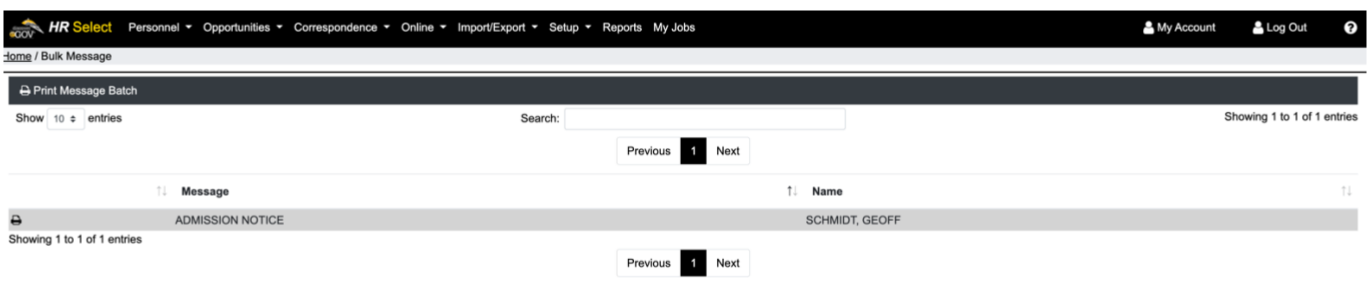
- **Agency -** This will select applicants by the Agency associated with the application
- **Department** - This will select applicants by the Department associated with the application
- **Application Status** - This will select applicants by their current Application Status
- **Checkbox for Only on 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

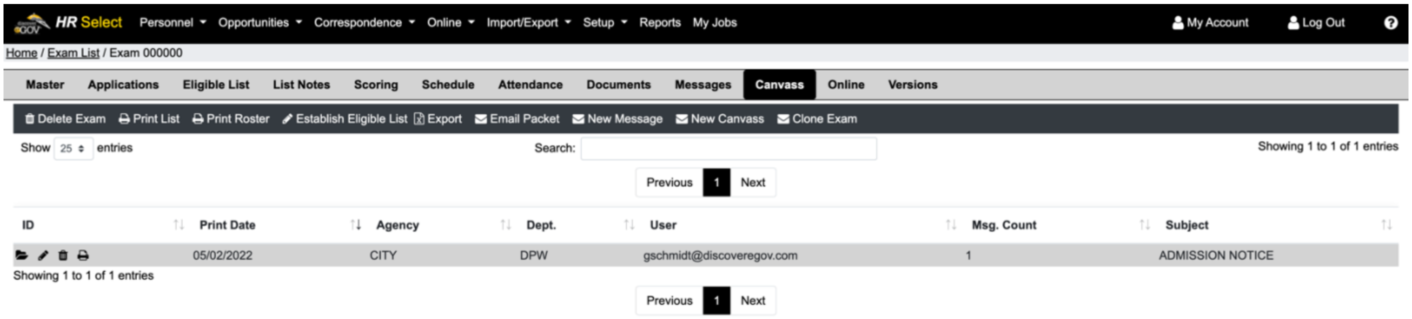
After selecting the folder icon of an existing letter batch, the following screen appears. All letters are retained in the system indefinitely.



- <u>**Actions**</u> – 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.

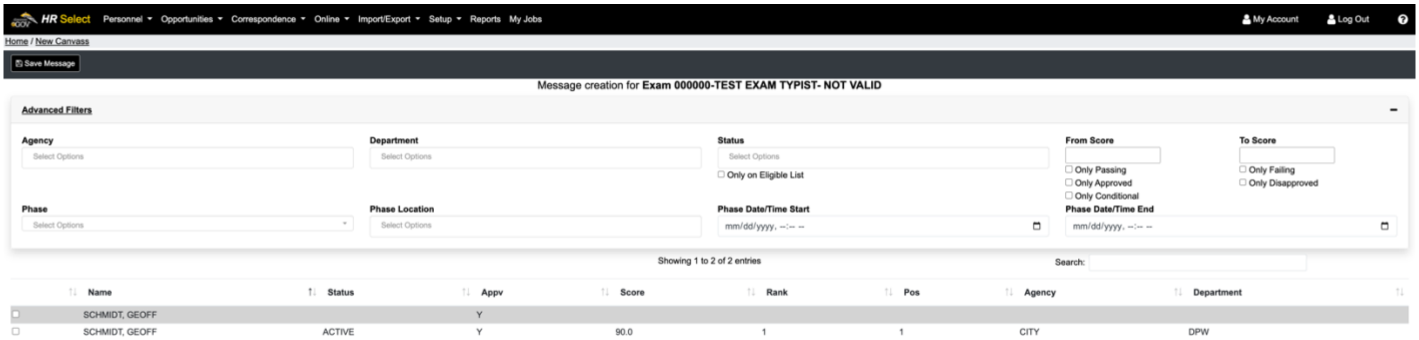


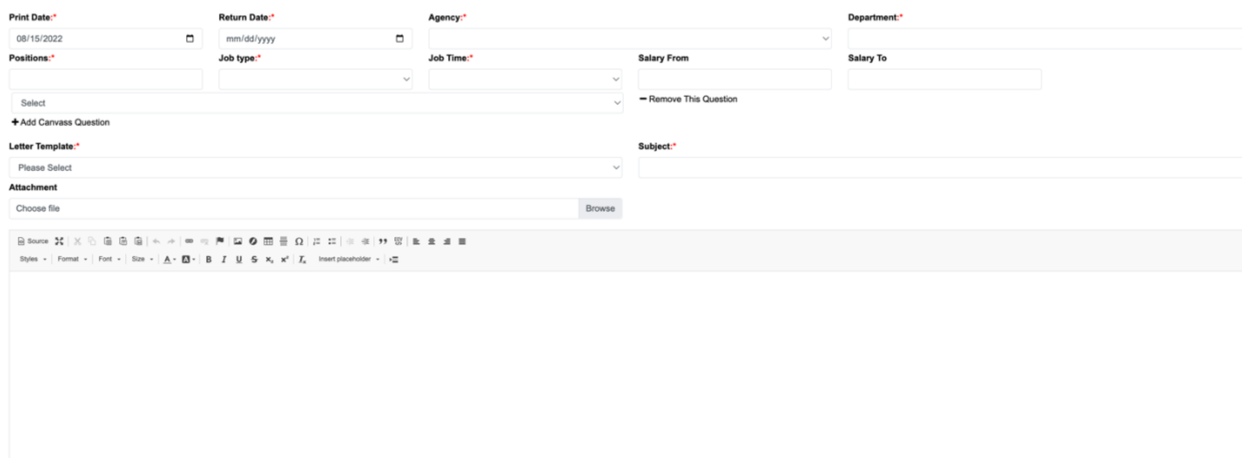
- **Actions** – Folder icon is used for viewing a batch of letters and inputting responses, the pencil icon is for editing the canvass letter, the trashcan icon is for deleting and the print icon is for printing.
- **Print Date** - The actual print date of the letter. This is specified when you create 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.





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.

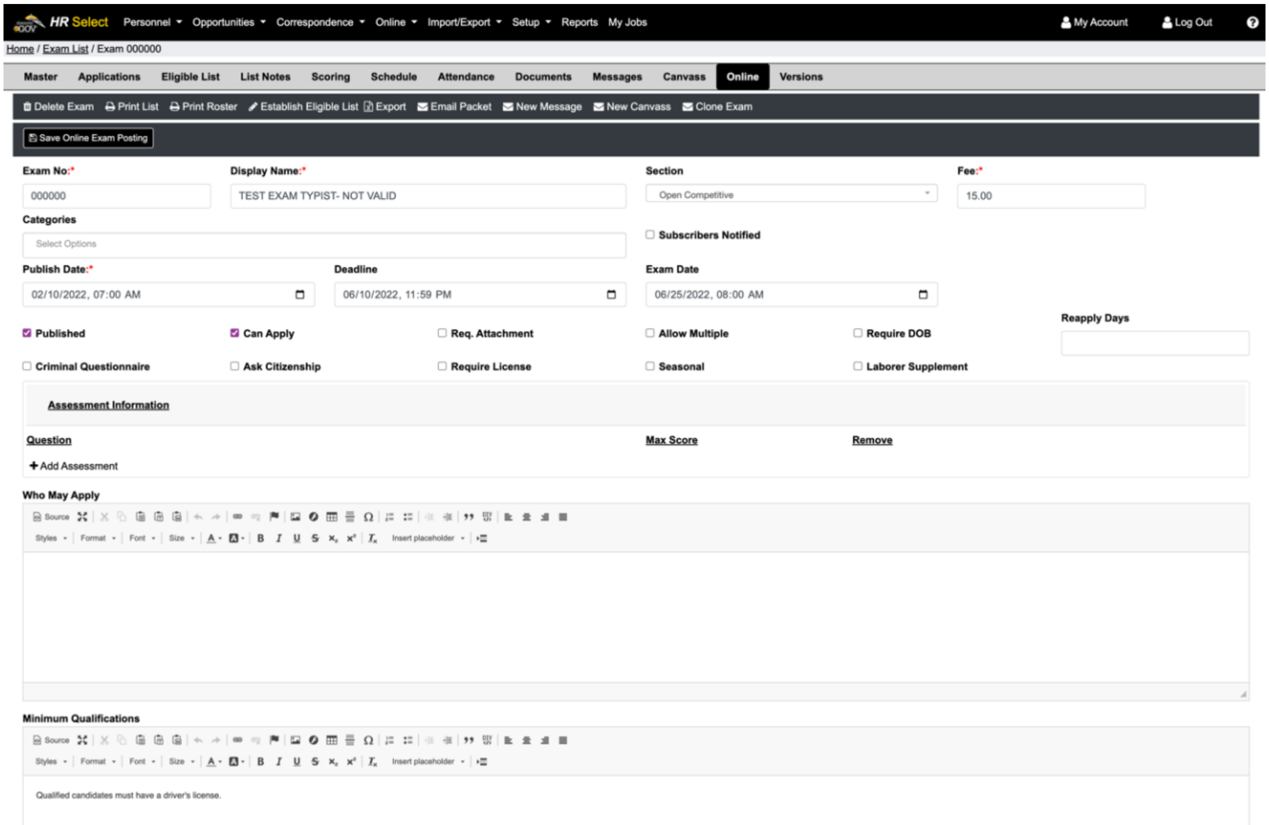
Exams – Creating and Viewing Canvass Responses

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

- **<u>Actions</u>** – 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.



- **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.

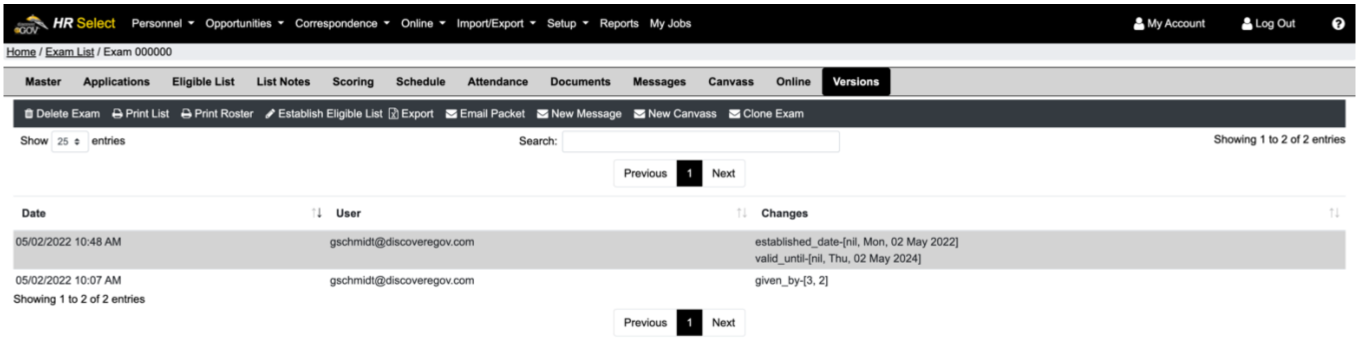
- **Who May Apply** – Instructions for who is eligible to apply for this exam – to display in online portal (must be previously setup in application)
- **Minimum Qualifications** – The minimum qualifications required for candidates to take this exam to appear in a popup before they apply (must be previously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

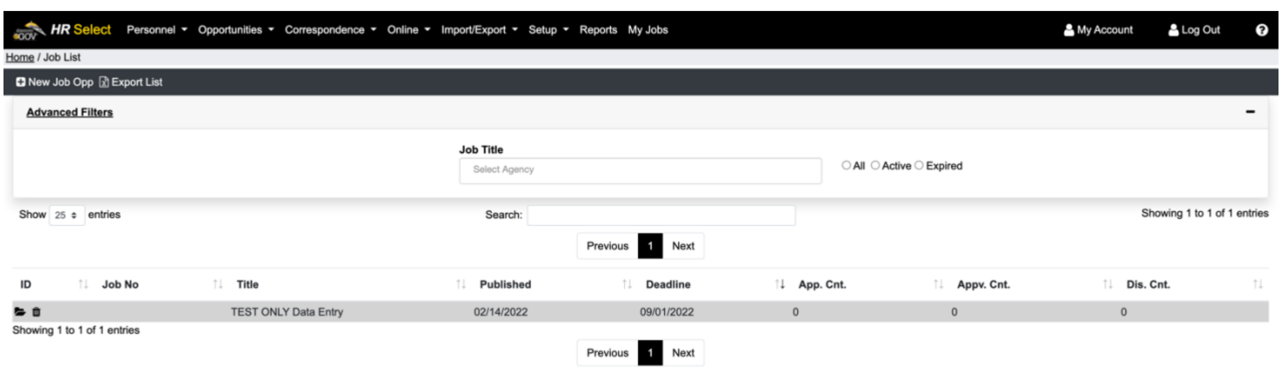
Exams – Versions

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.



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.

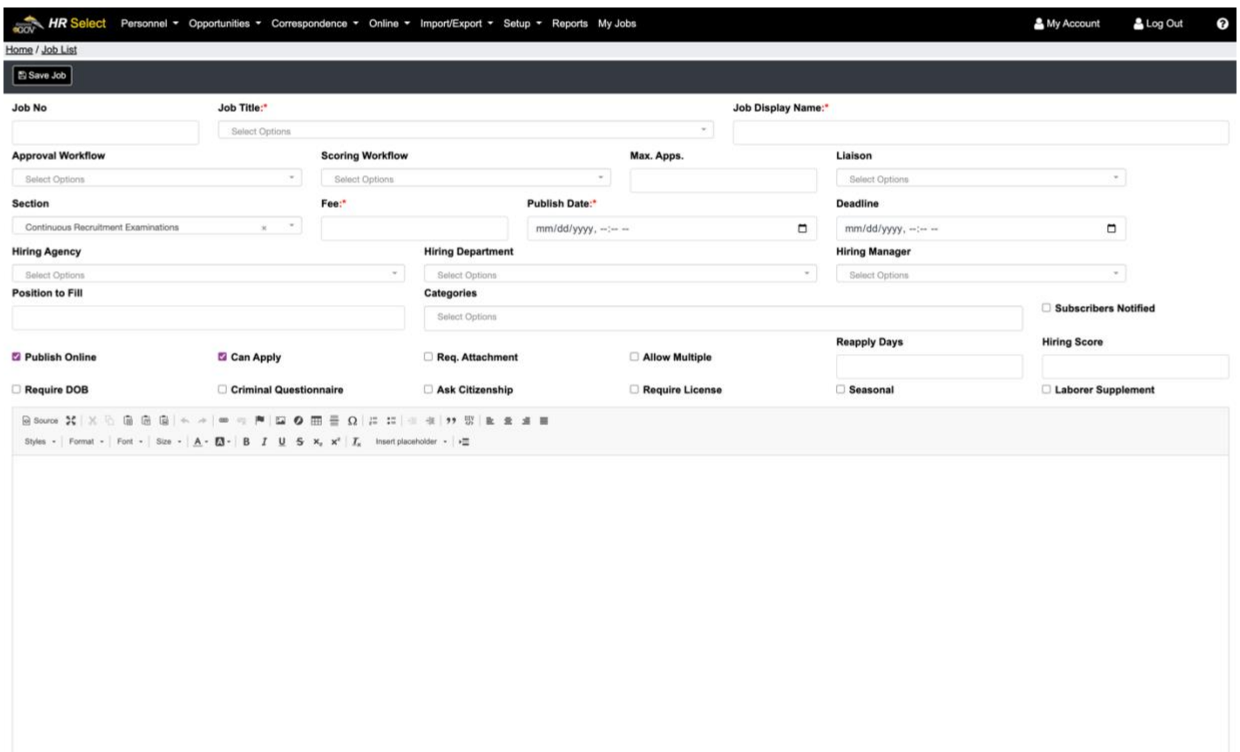


- **Action** - Use the folder icon to open an **EXISTING** Exam Record or trashcan to delete a job listing
- **Job No** - The number assigned to the Job
- **Title** - The title of the Exam. This can be the job title or a custom title you assign to the exam
- **Published** - Date the job was published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



- **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

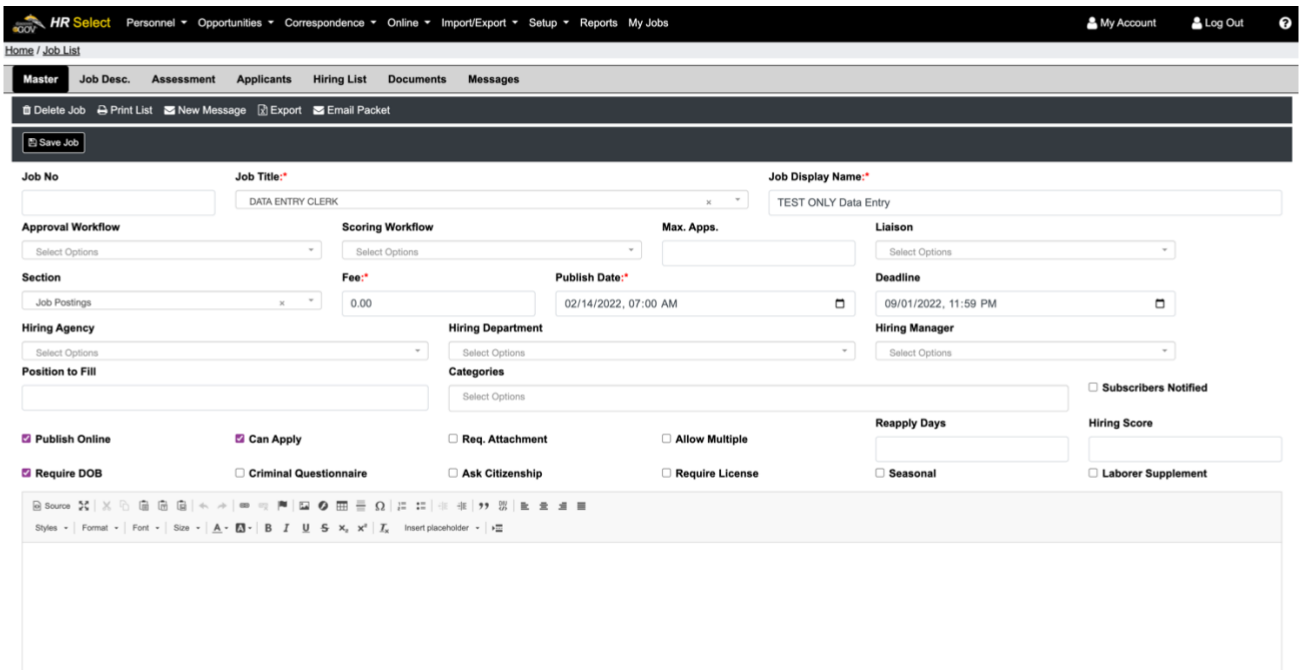
- **Subscribers Notified** – This will check automatically once alert goes out. To send announcement to people who have not received the notification as of yet, uncheck the box – a notice will go out to those who did not receive the first one. If an applicant has been sent the notice they will not get 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.



<u>Menu Bar</u>

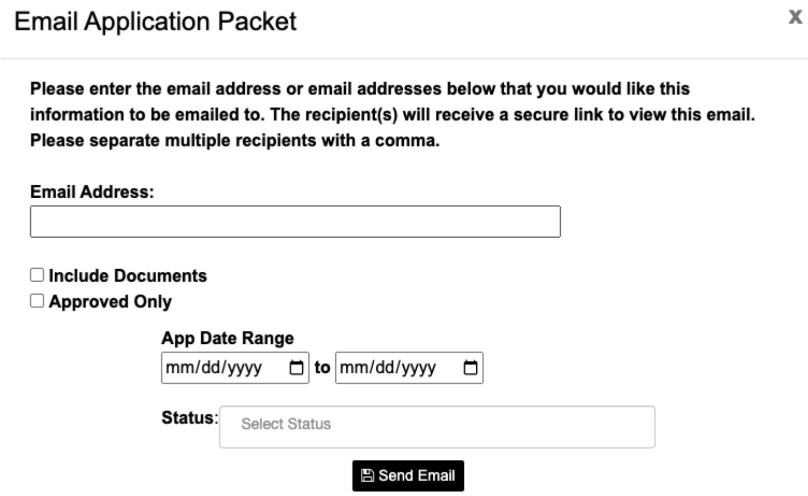
Delete Job - This will delete this job record. Jobs with applicants will not be able to be deleted without all associated information being deleted first.

Print List - Print the list of applicants for this job

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

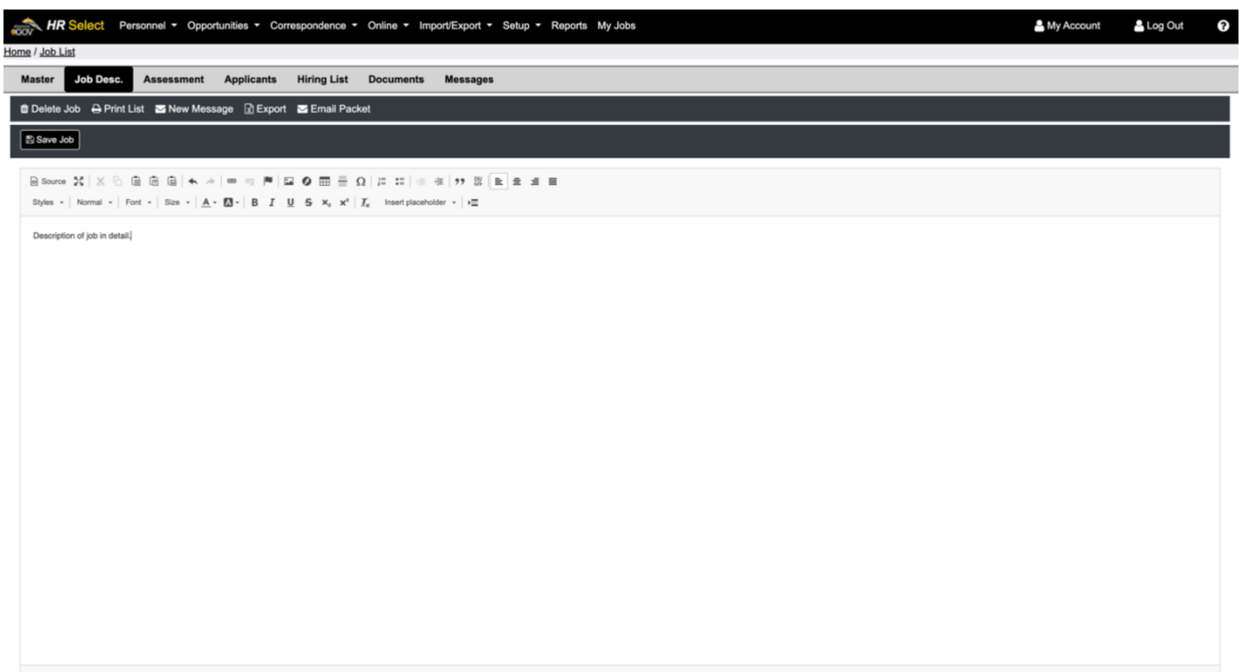
Export – Creates an export of the Exam information and associated applicant information

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



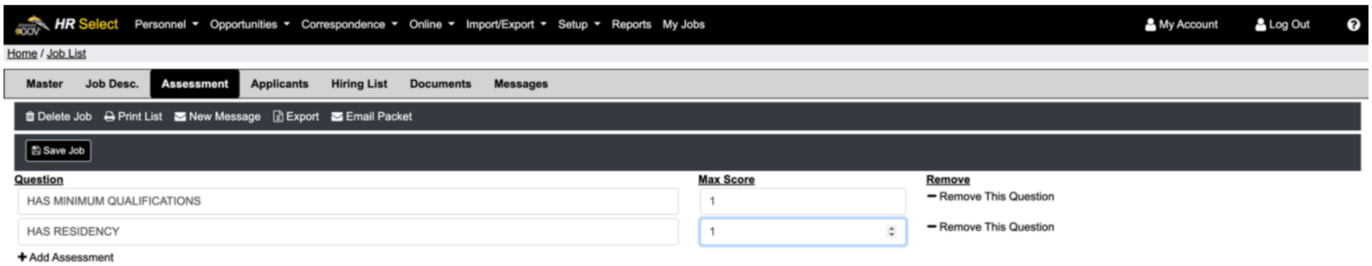
Jobs – Job Desc. Tab

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



Jobs – Assessment Tab

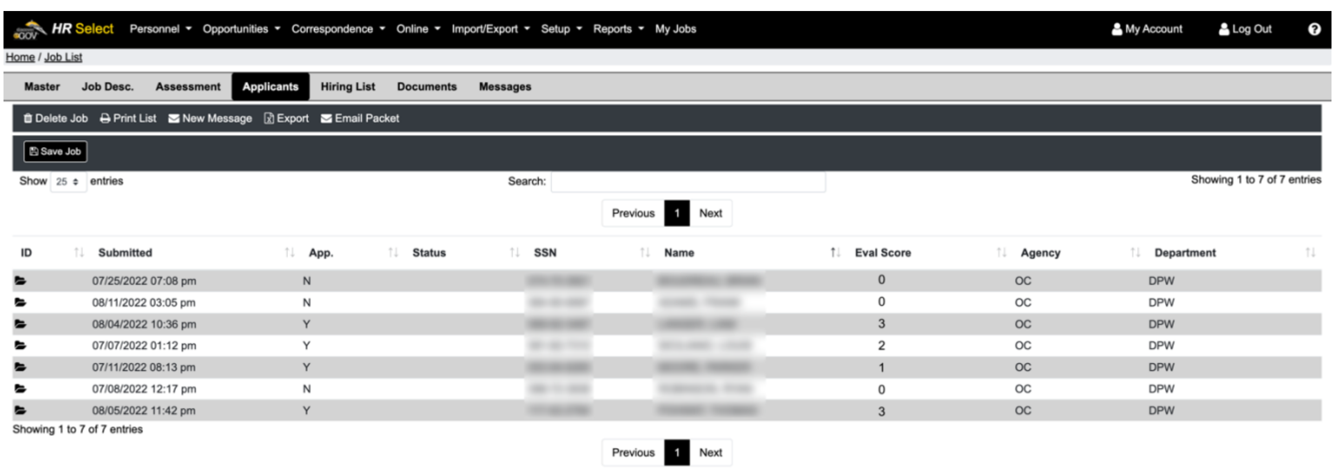
Setup assessment questions and assign a score to each question so when someone is reviewing the application they can use the assessment tab to help them assess if applicant is meeting requirements. Useful when doing non-competitive, score certain parameters for hiring and then use in hiring list similar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



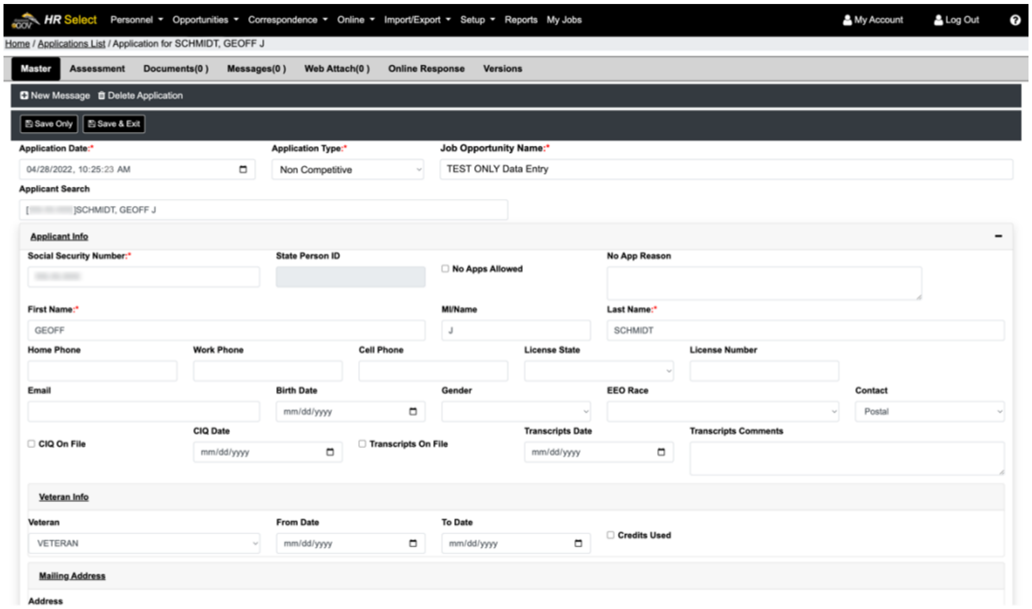
- **Action** – Use "+ Add Assessment" option to add assessment question(s)

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.

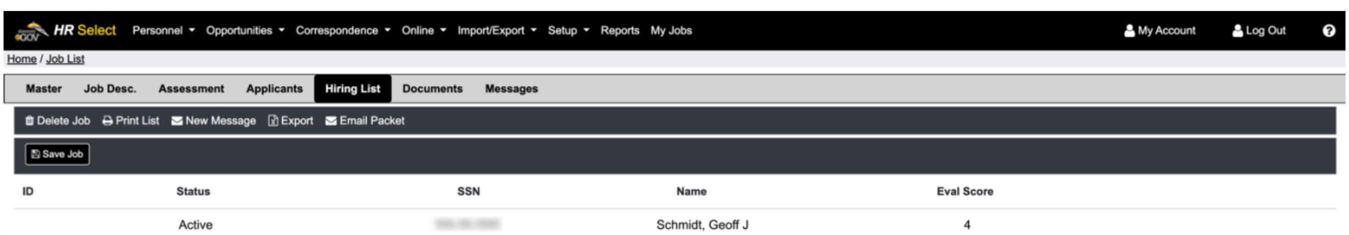


- **Action -** The folder icon will open the master applicant screen for that applicant



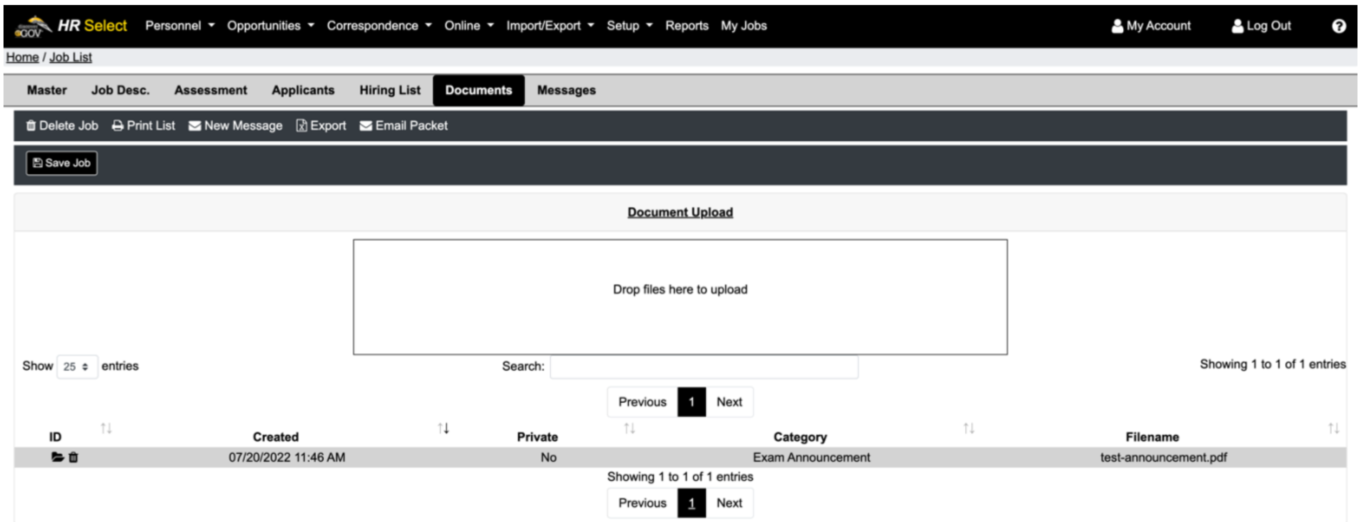
Jobs – Hiring List Tab

Create a hiring list based on evaluation score.



Jobs – Documents

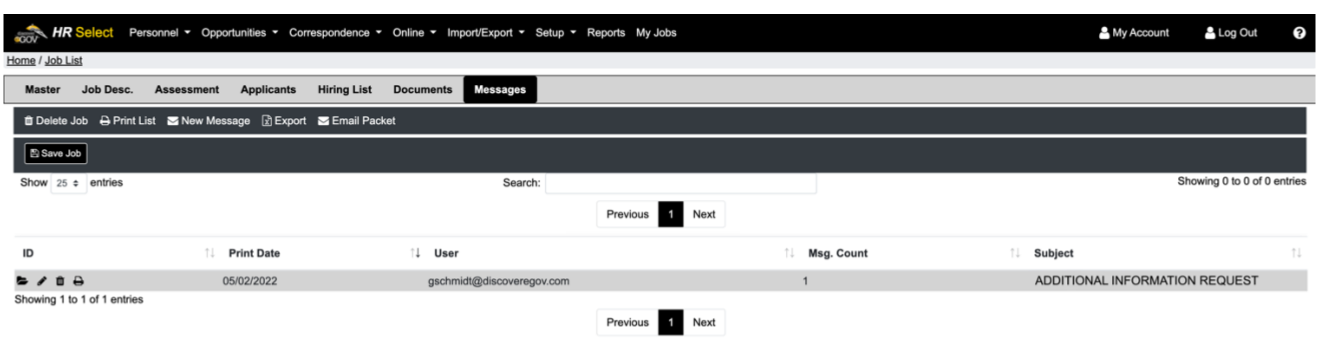
The documents tab allows you to attach documents to this job. Any number of documents may be attached and categorized for this job. To upload a document you can drag a file from your desktop into the area marked "Drop files here to upload" or you can use the “Document Upload” link to select a file from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



- **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.



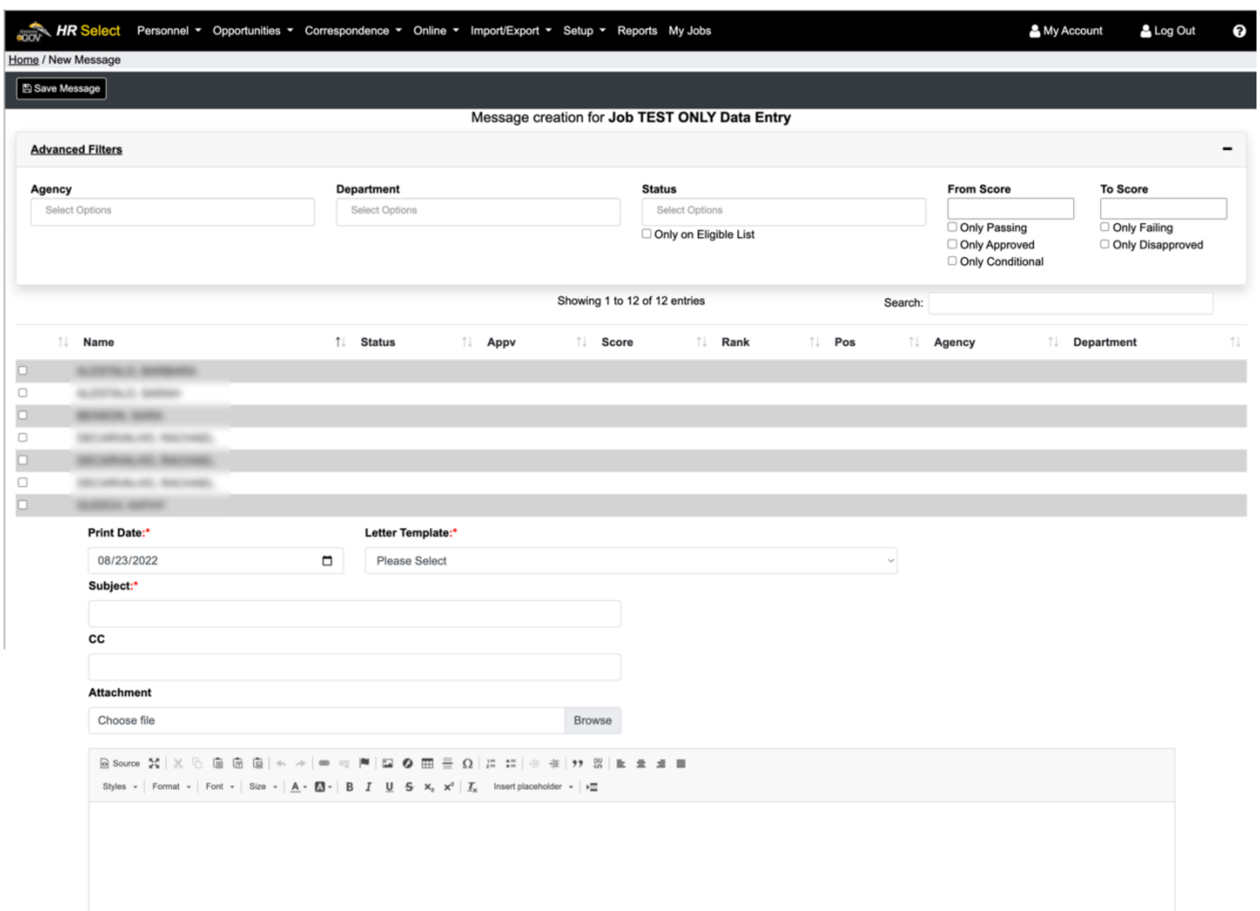
- **Actions** - "Folder icon" is used for viewing a previously created batch of messages, “pencil icon” is for editing, “trashcan icon” deletes the message and the “printer icon” prints the messages.

- **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).



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.

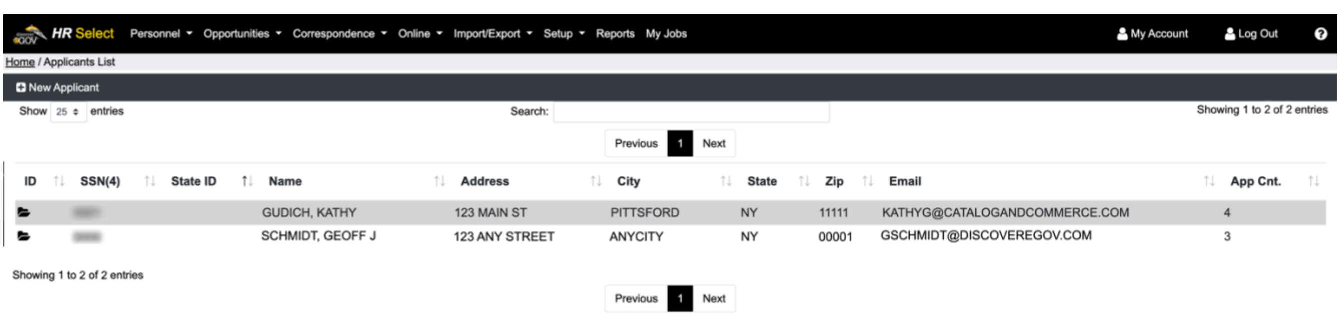
Advanced Filters

- **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.

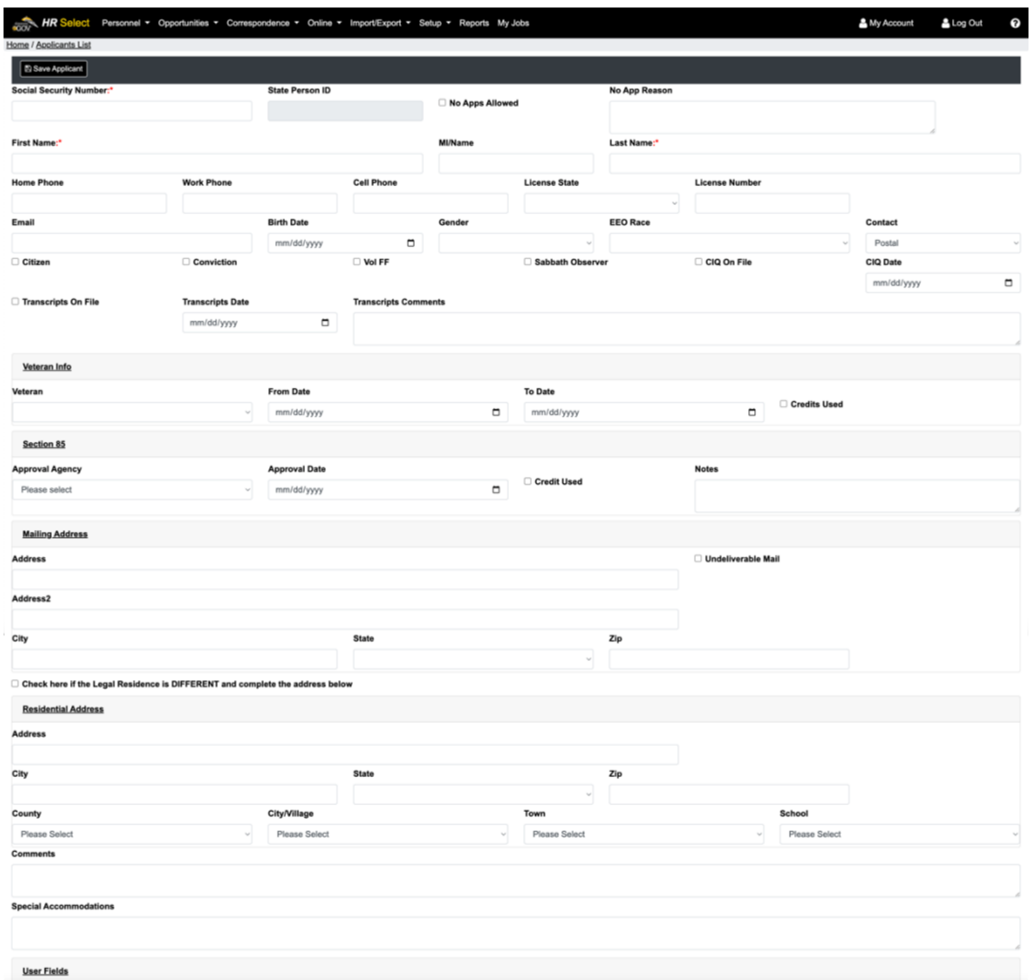


- **Action** - Folder icon will open the application approval and scoring window for this particular application, the "New Applicant" option in upper left will open a new applicant screen
- **SSN** - The last four of the social security number of the applicant

- **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.



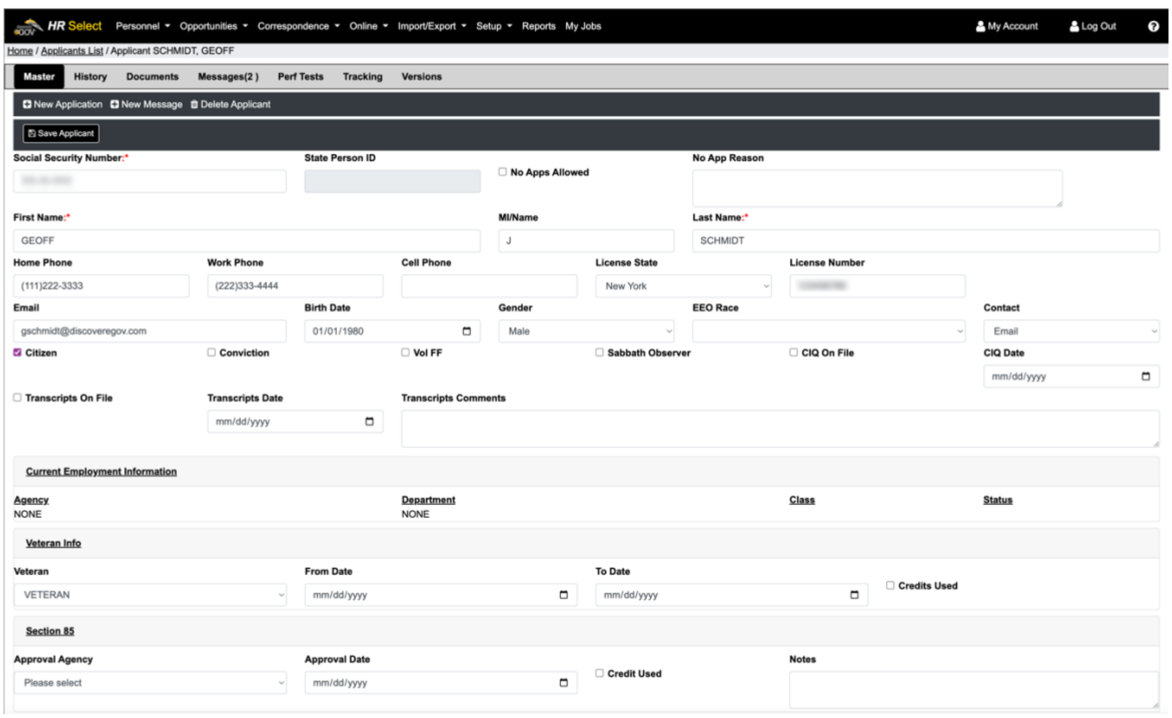
- **SSN** - The Social Security Number of the Applicant. You will not be able to create multiple applicant records with the same social security number. If you do not enter a Social Security Number, the system will generate a temporary identification number for you when you save applicant
- **State Person 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.



<u>**Menu Bar**</u>

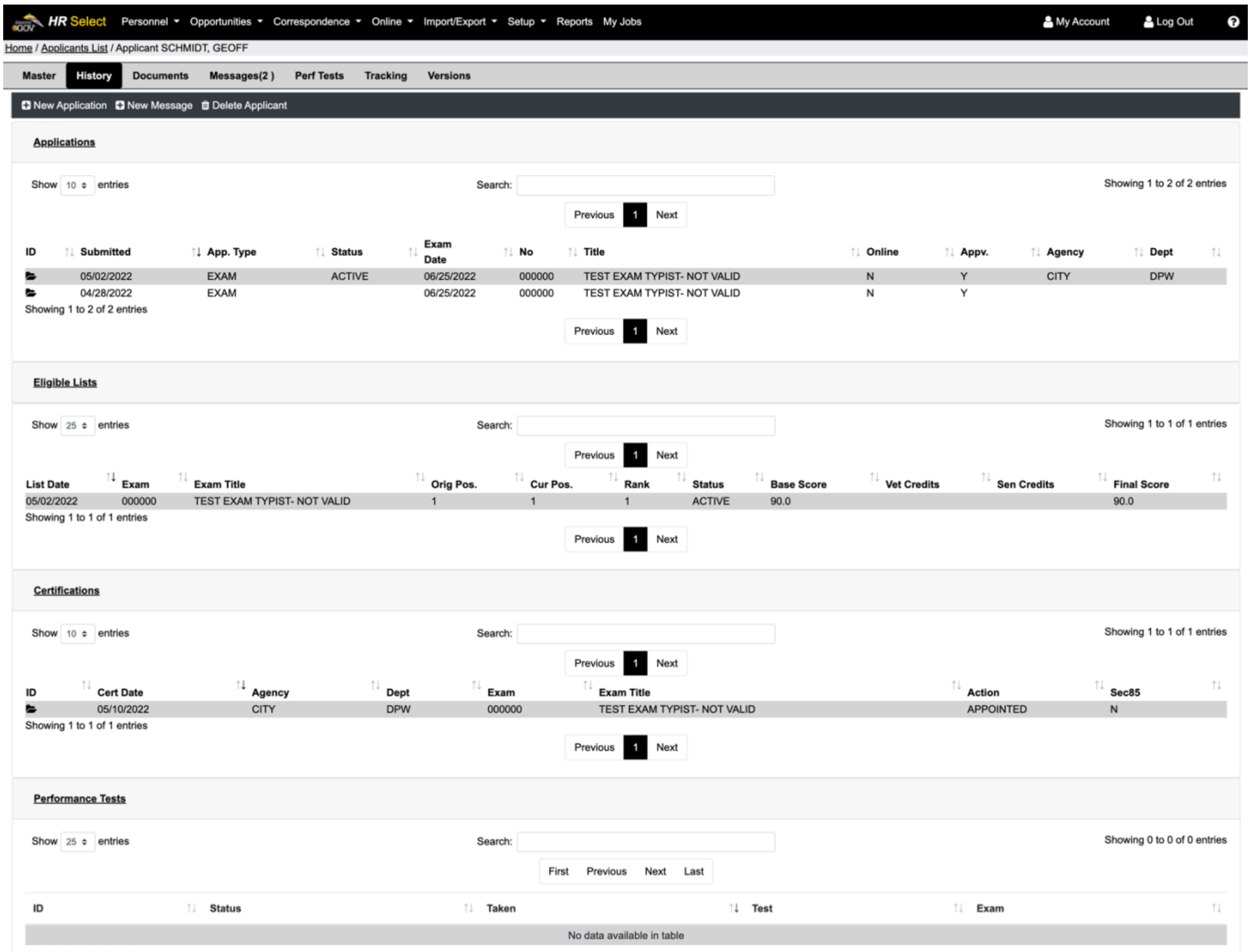
New Application – Starts a new application for that applicant – pre-populating the applicant's information into the new application

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.



- **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.

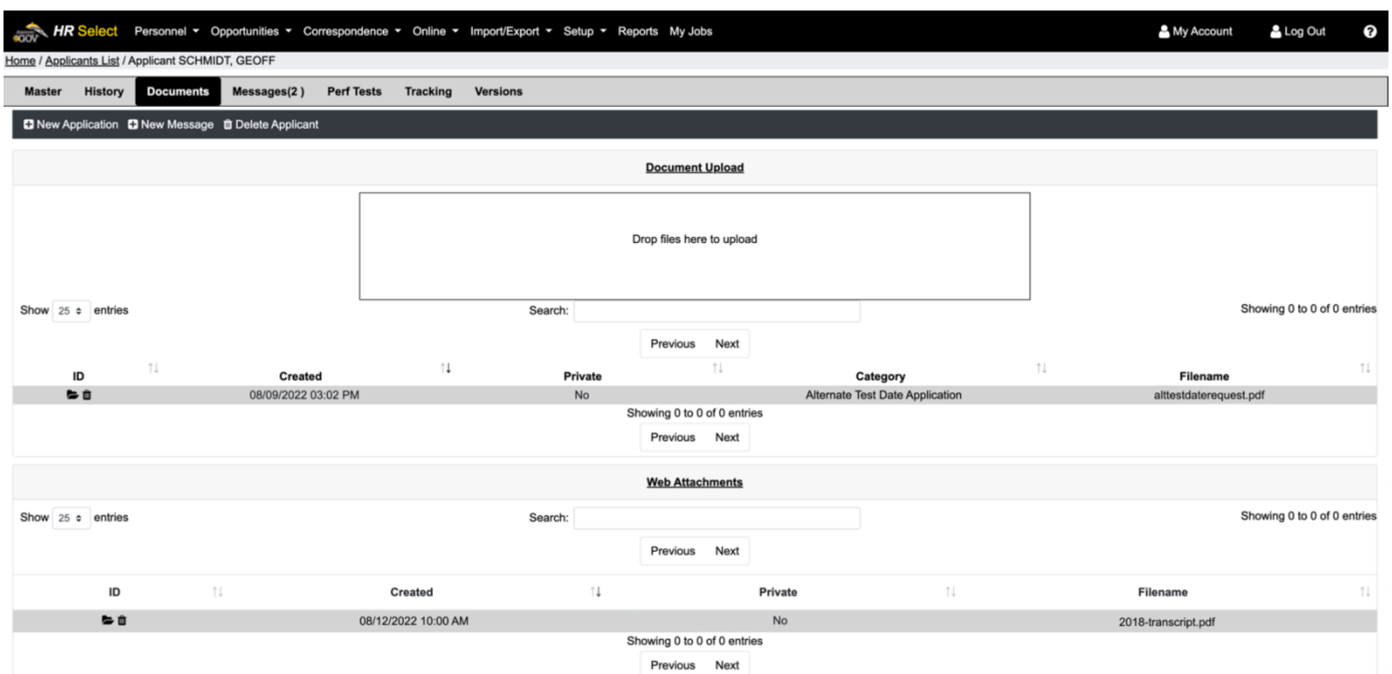
Performance Tests

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.

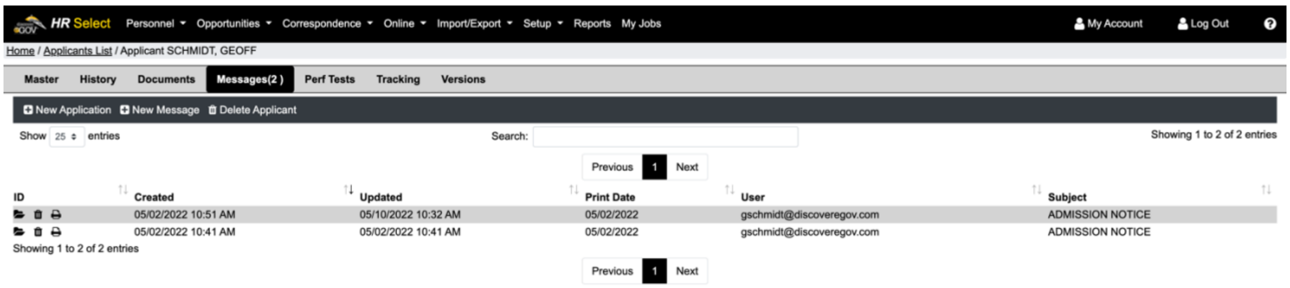
The second section “Web Attachments” will list all documents the applicant uploads via the online application portal such as transcripts, copy of license, etc.



- **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.

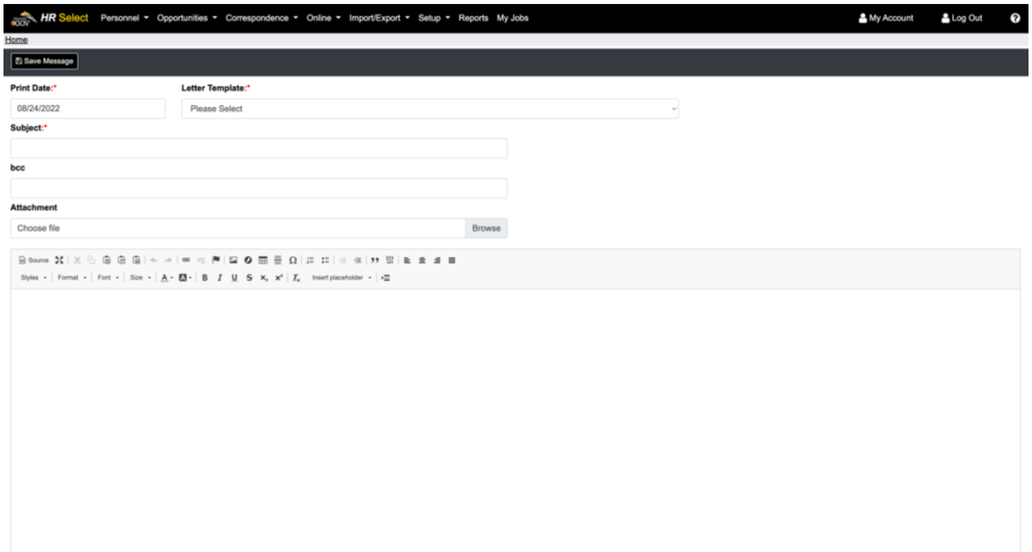


- **Actions** - Folder icon is used for viewing a message, trashcan icon deletes the message and the printer icon prints the messages.
- **Created** - The date the message was created
- **Updated** - The date a message was update if applicable
- **Print Date** - The actual print date of the message. 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.

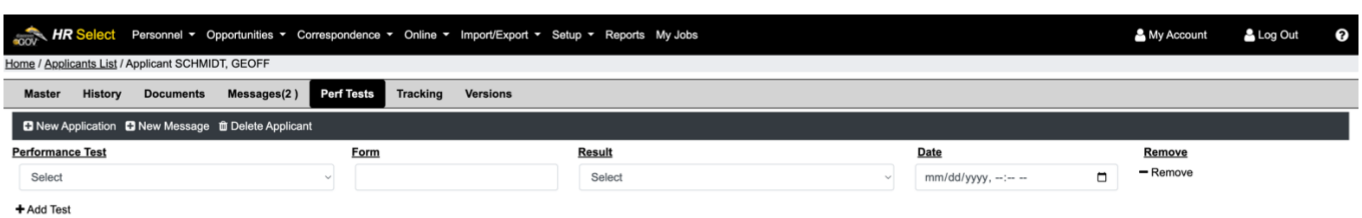


- **Print Date** - The date you want the messages to be printed or emailed. For printed message, they may be printed before this date however this is the date that will show on the message.
- **Letter Template** - You may select a pre-defined letter template form dropdown as defined under Setup > Message 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.

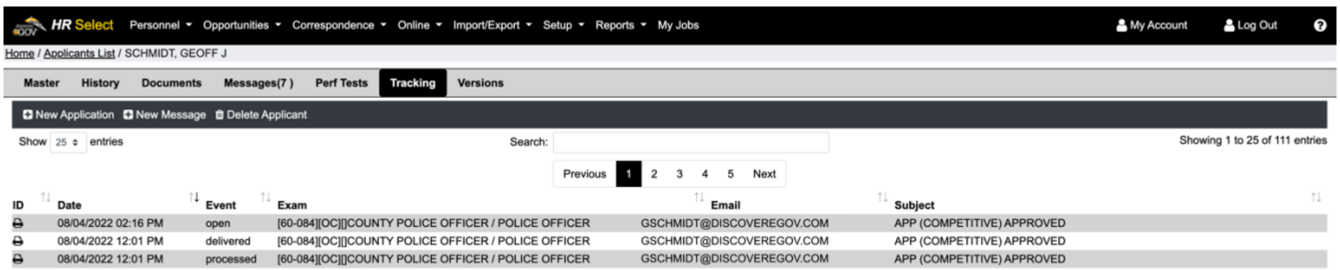


- **Actions** - "Add Test" option provides new test fields
- **Performance Test** – The name of the test with a dropdown of options previously created under Setup > Perf. Tests

- **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

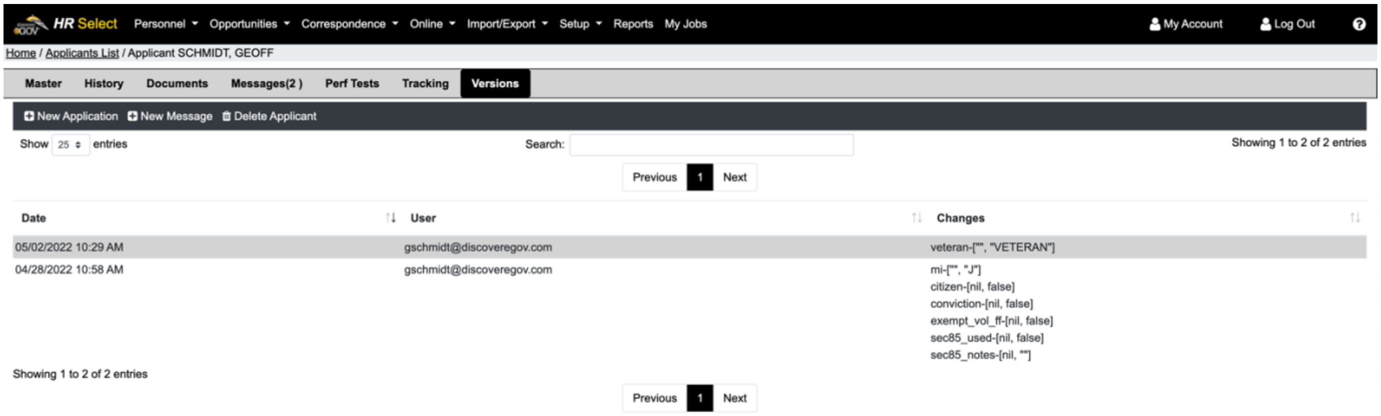
The Tracking Tab offers very detailed information on the interaction of an applicant with any email correspondence sent to them. It tracks delivery and opening of emails at the specific message level.



- **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

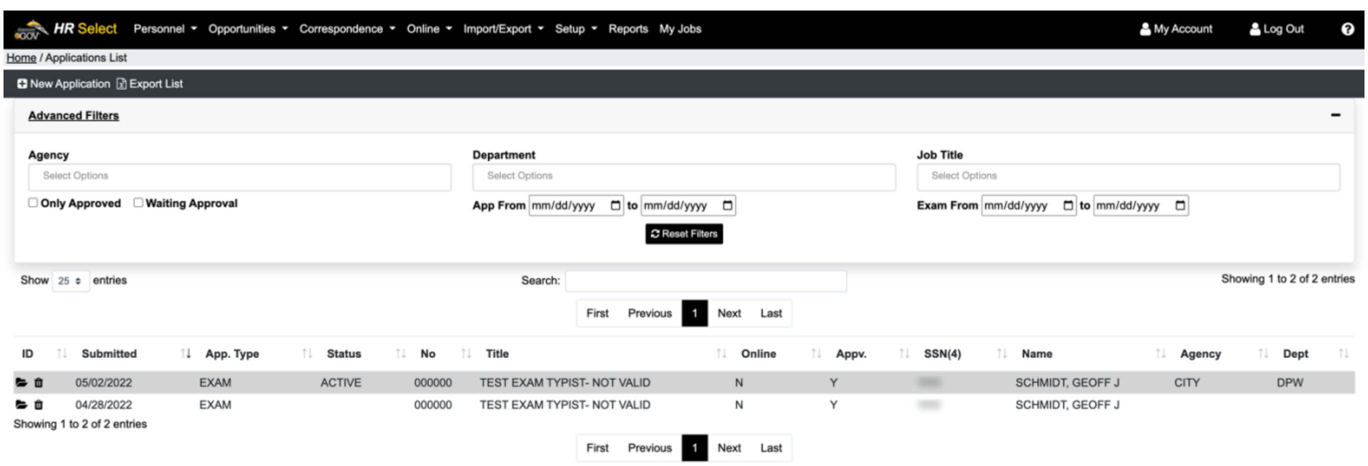
Applicants – Versions Tab

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.



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.



- **<u>Actions</u>** – 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

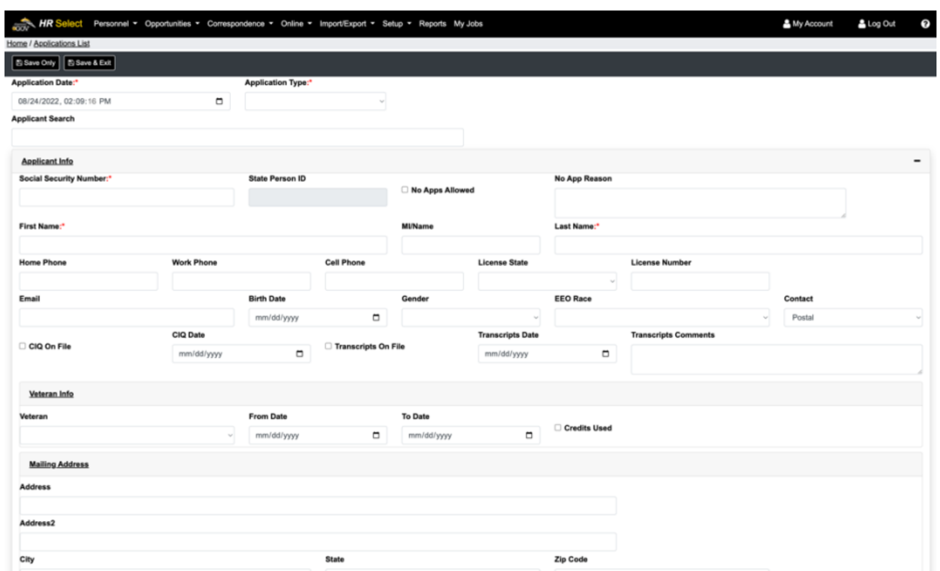
- **Title** – The title of the exam or job
- **Online** – If the application was done online
- **Approved** – If the application has been approved
- **SSN(4)** – Last four digits of applicant's social security number
- **Name** – The full name of the applicant
- **Agency** – The agency associated with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

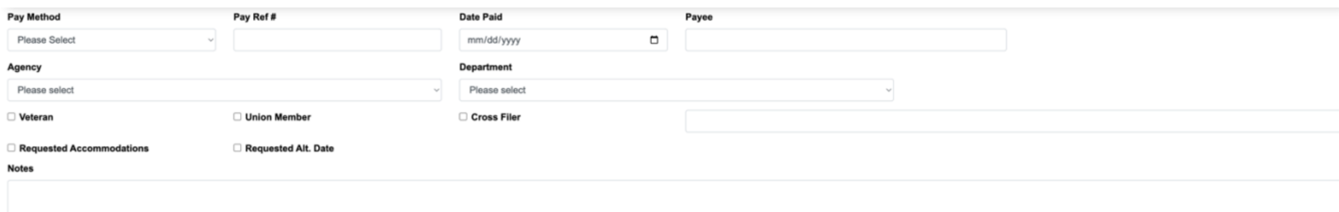
You will have one applicant record per social security number. If you try to add a duplicate social you will not be able to save it – an error will alert you that number is already used.



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

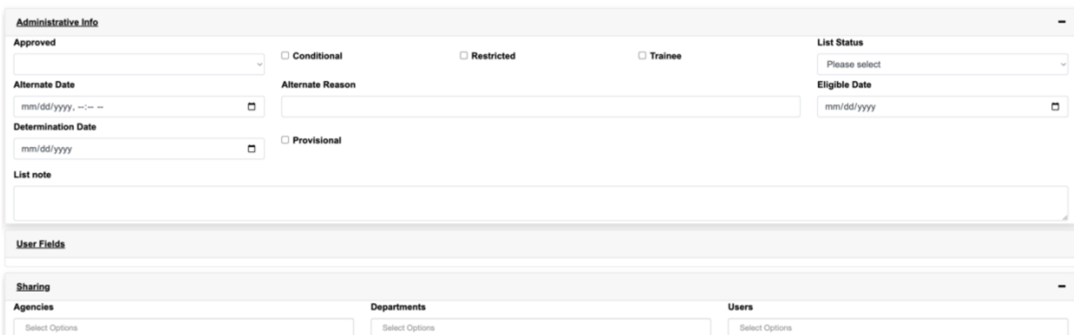
- **Restricted Reason and Restricted Comment** - same as above, reason is short general statement and comment is more detailed explanation.
- **Trainee** - flag an application as a trainee application

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

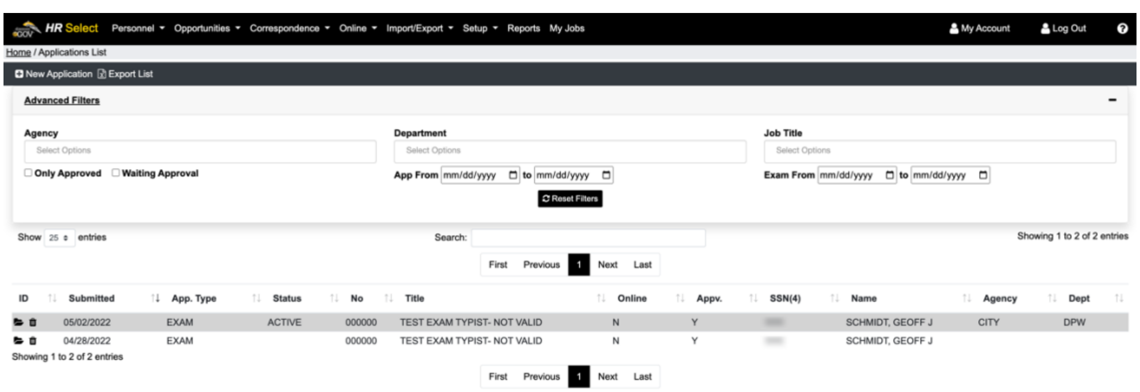
- **List Note** - Any notes you want to appear on the eligible list for this application
- **Sharing** – Agency, Department or User you want to share application with

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

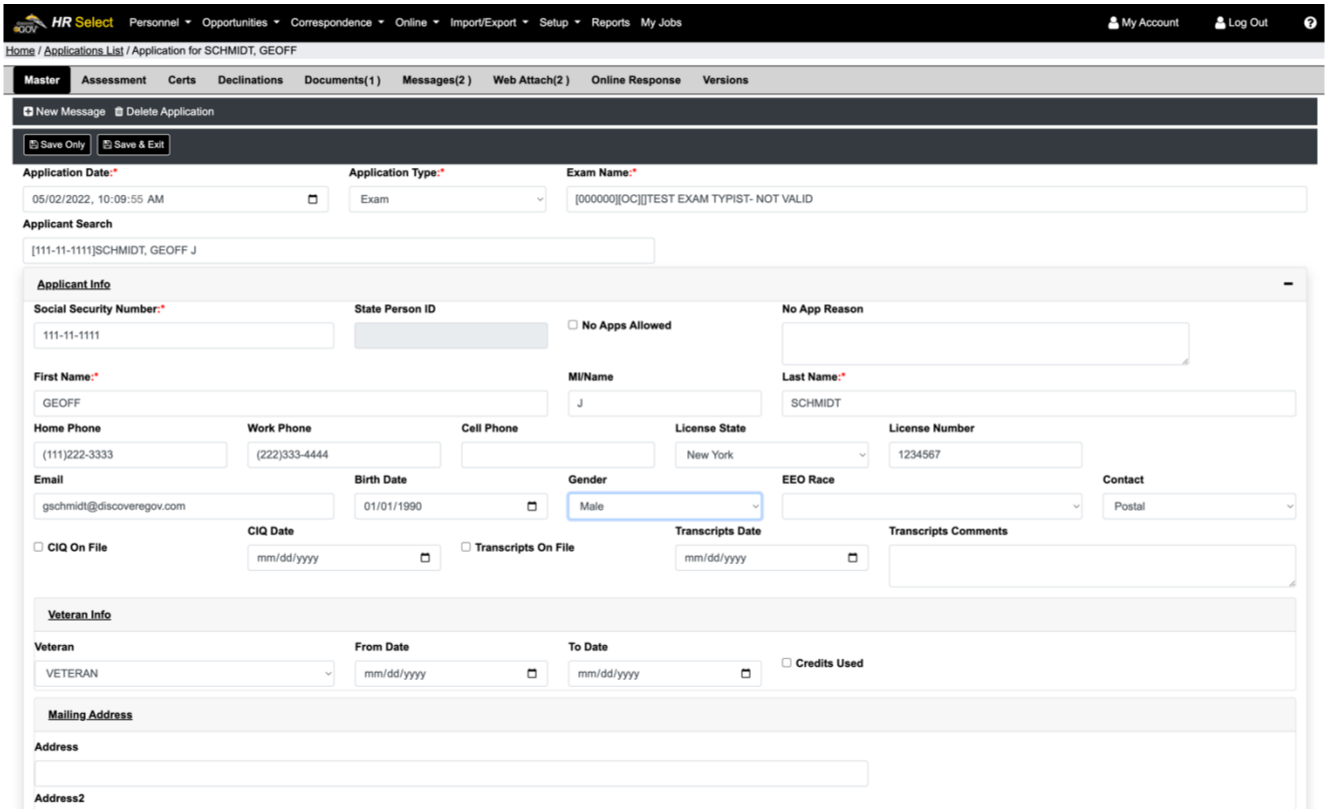


Viewing/Editing Existing Applications – Master Tab

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



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

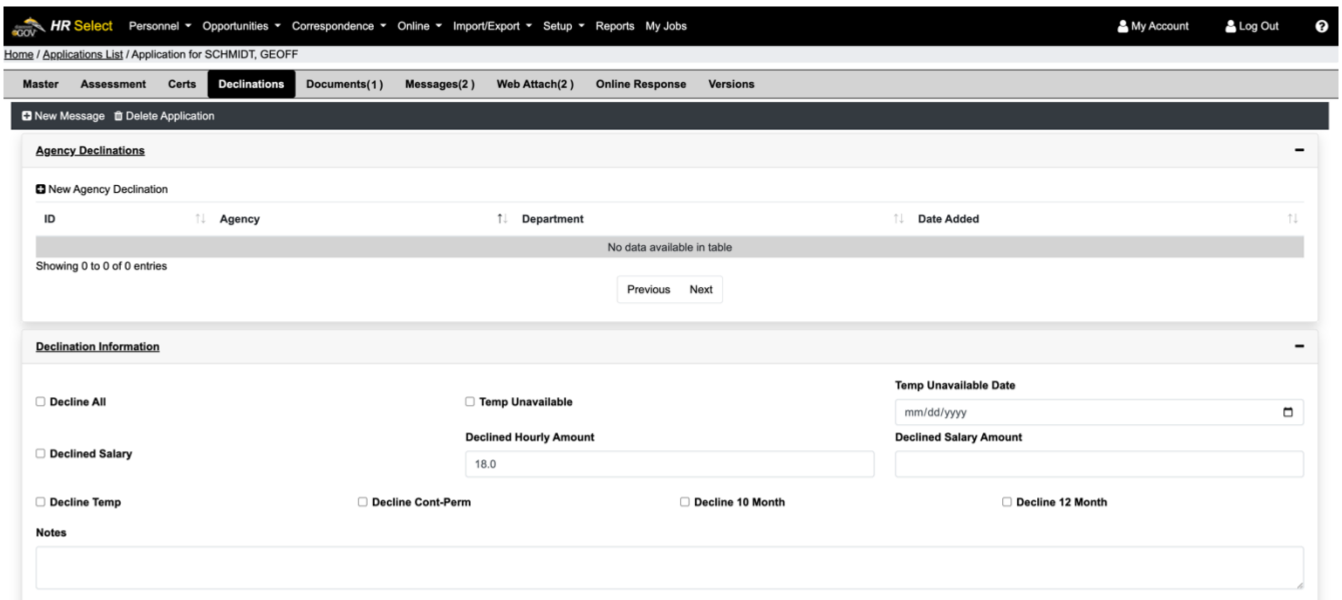
Shows when an application has been used in a certification.

- **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

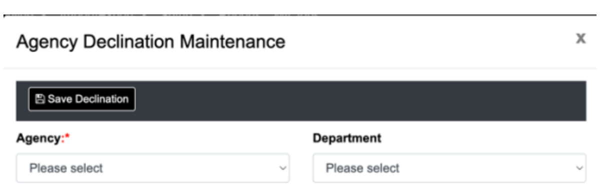
- **Action** – What action occurred

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.



- **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



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

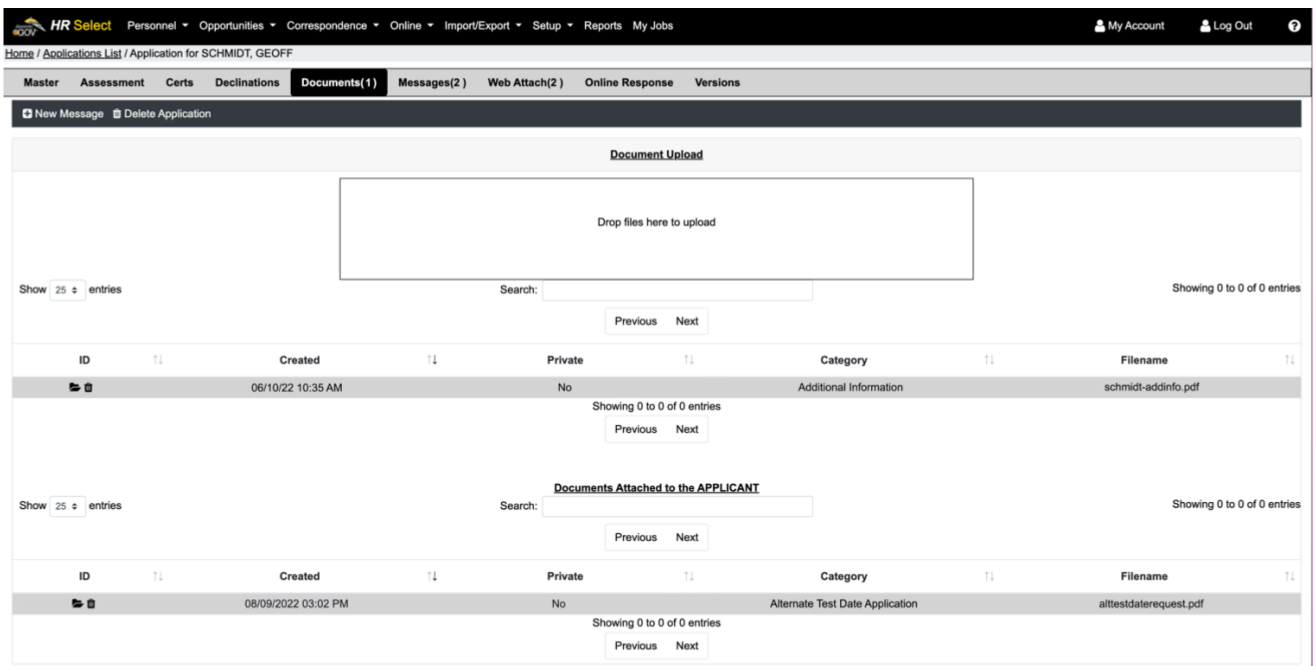
- **Declined Cont-Perm** – declines contingent permanent position
- **Decline 10 Month/Decline 12 Month** – declines for this amount of time but wants to be considered after this time frame

- **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.

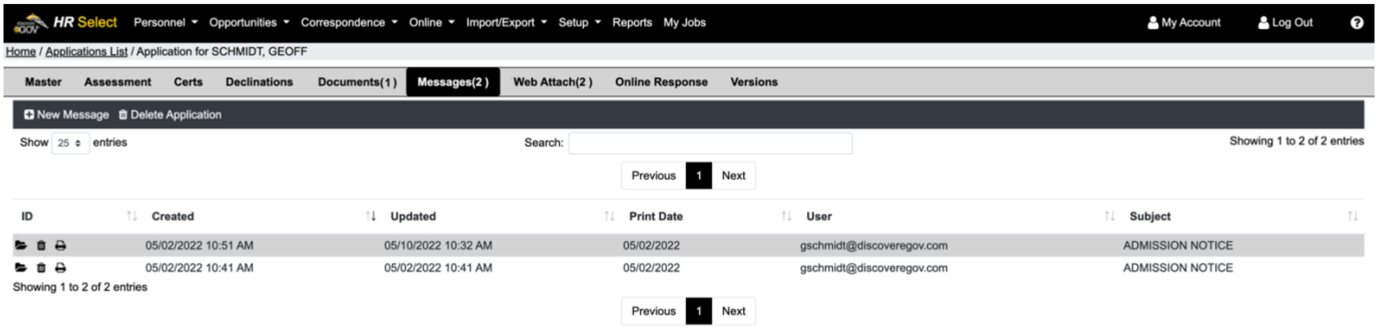
The second section “Documents Attached to the APPLICANT” will list all documents that were uploaded to the applicant regardless of application.



- **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.



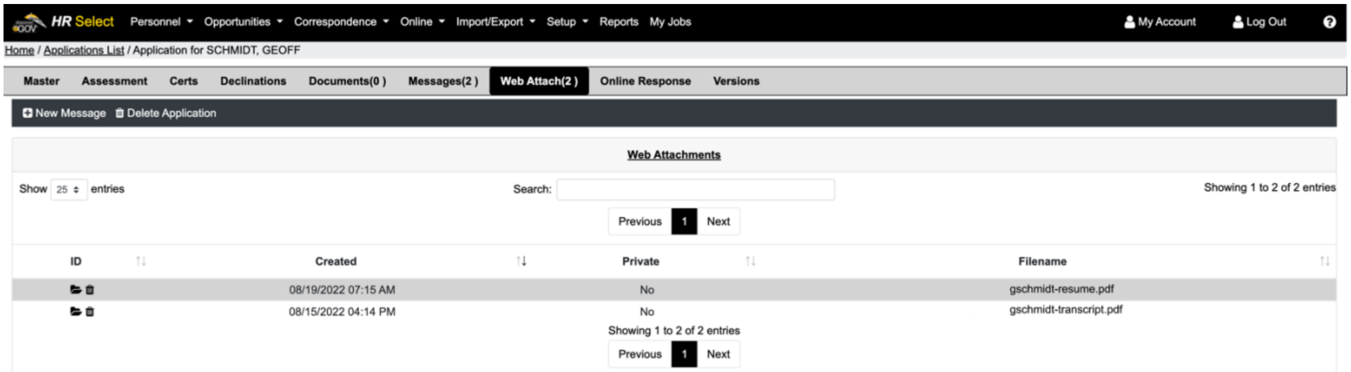
- **Actions** - Folder icon is used for viewing a message, trashcan icon deletes the message and the printer icon prints the messages.
- **Created** - The date the message was created
- **Updated** - The date a message was update if applicable
- **Print Date** - The actual print date of the message. 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

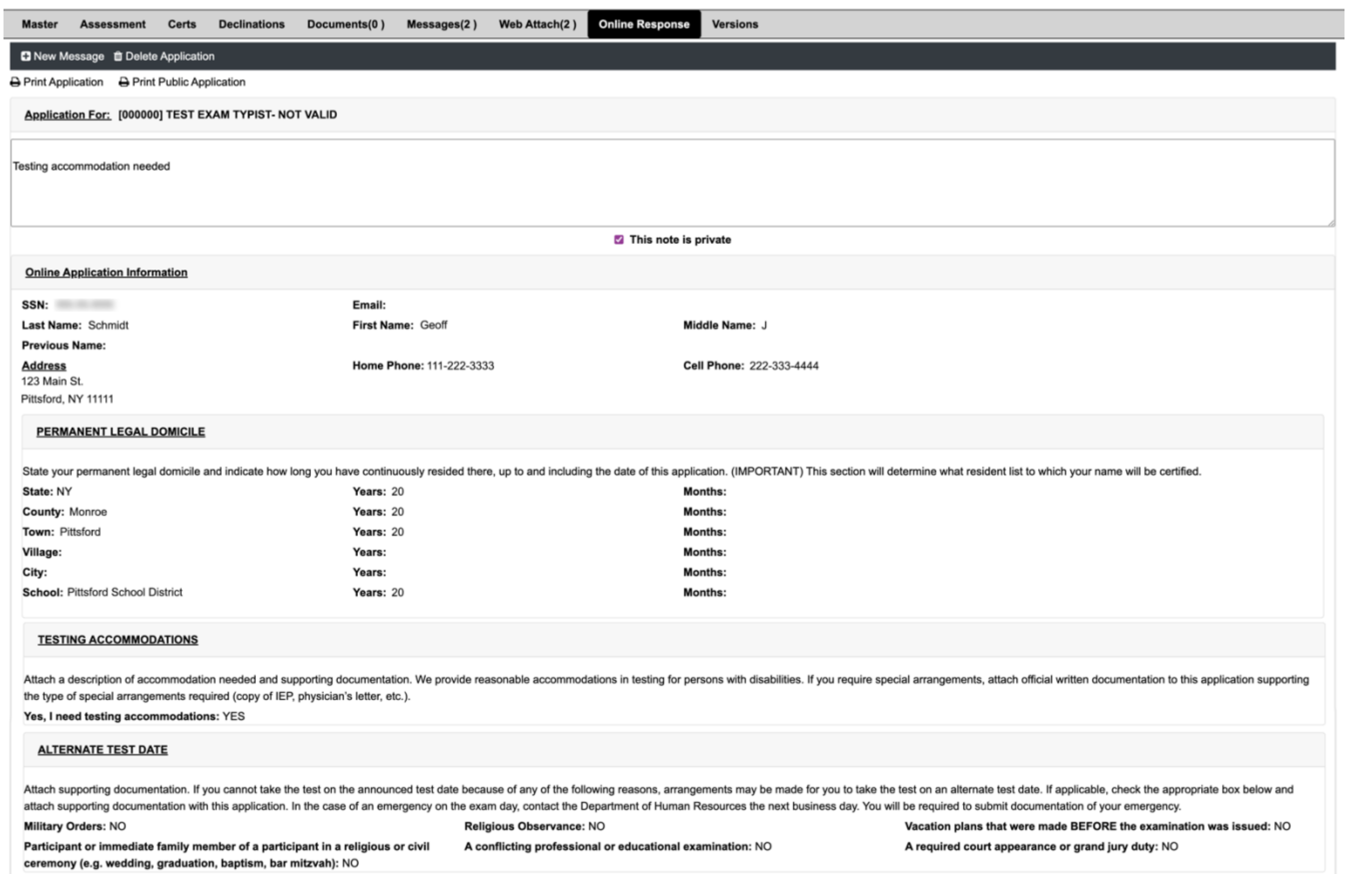
The web attach tab in an application provides a list of all attachments an applicant has uploaded to their online application.



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

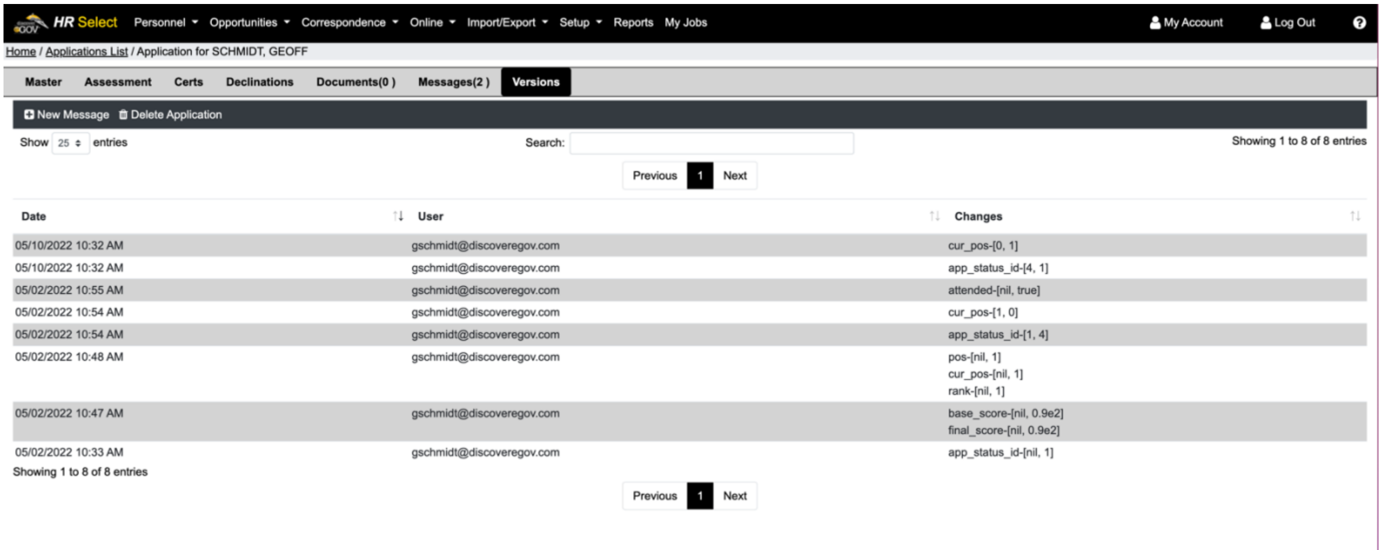
Applications – Online Response

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.



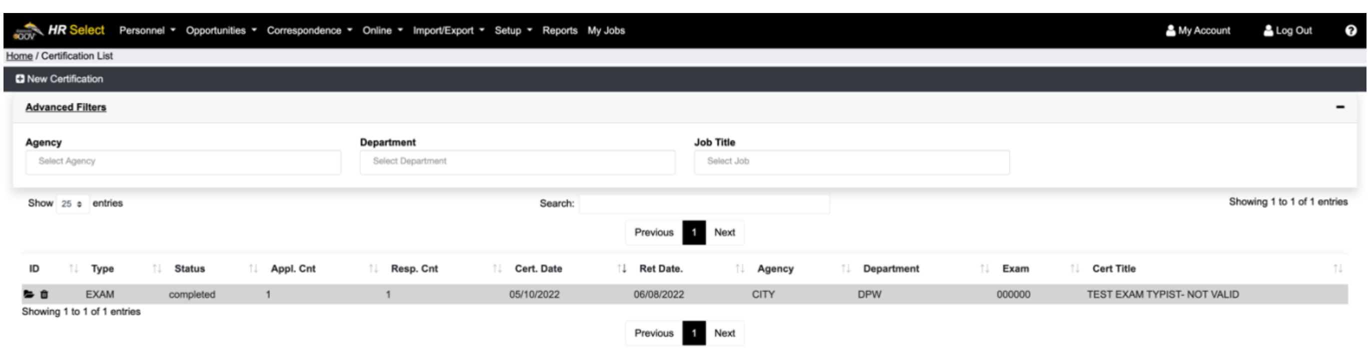
Applications – Versions Tab

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.



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.

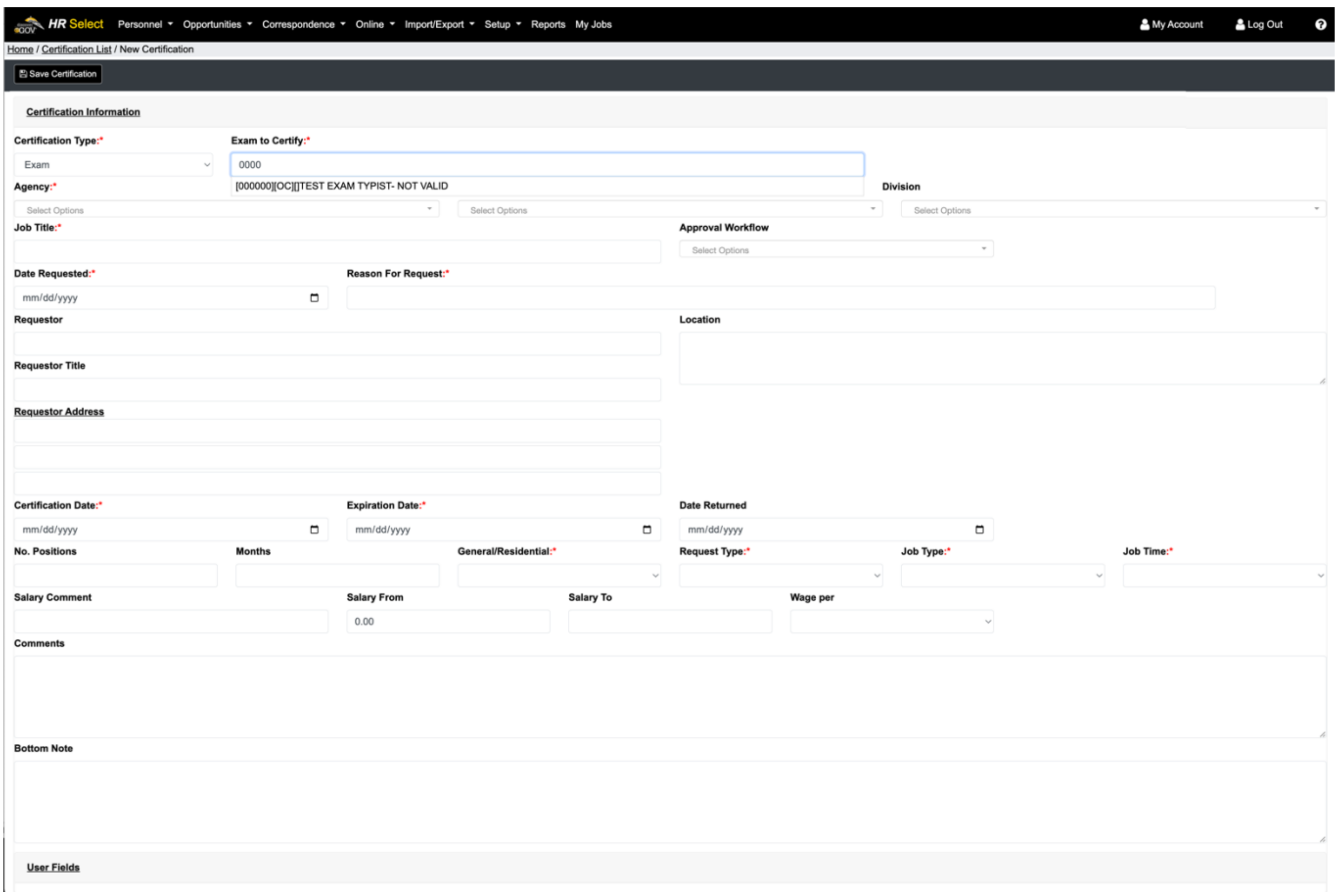


- **<u>Actions</u>** – The folder icon will open an certification for viewing or editing and the trashcan icon will delete a certification
- **New Certification** - Clicking the “New Certification” option will create a new certification form and allow you to add a certification to the system

- **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.

<u>Menu Bar</u>

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

Delete Certification – Deletes the certification

Print Cert - Print the certification

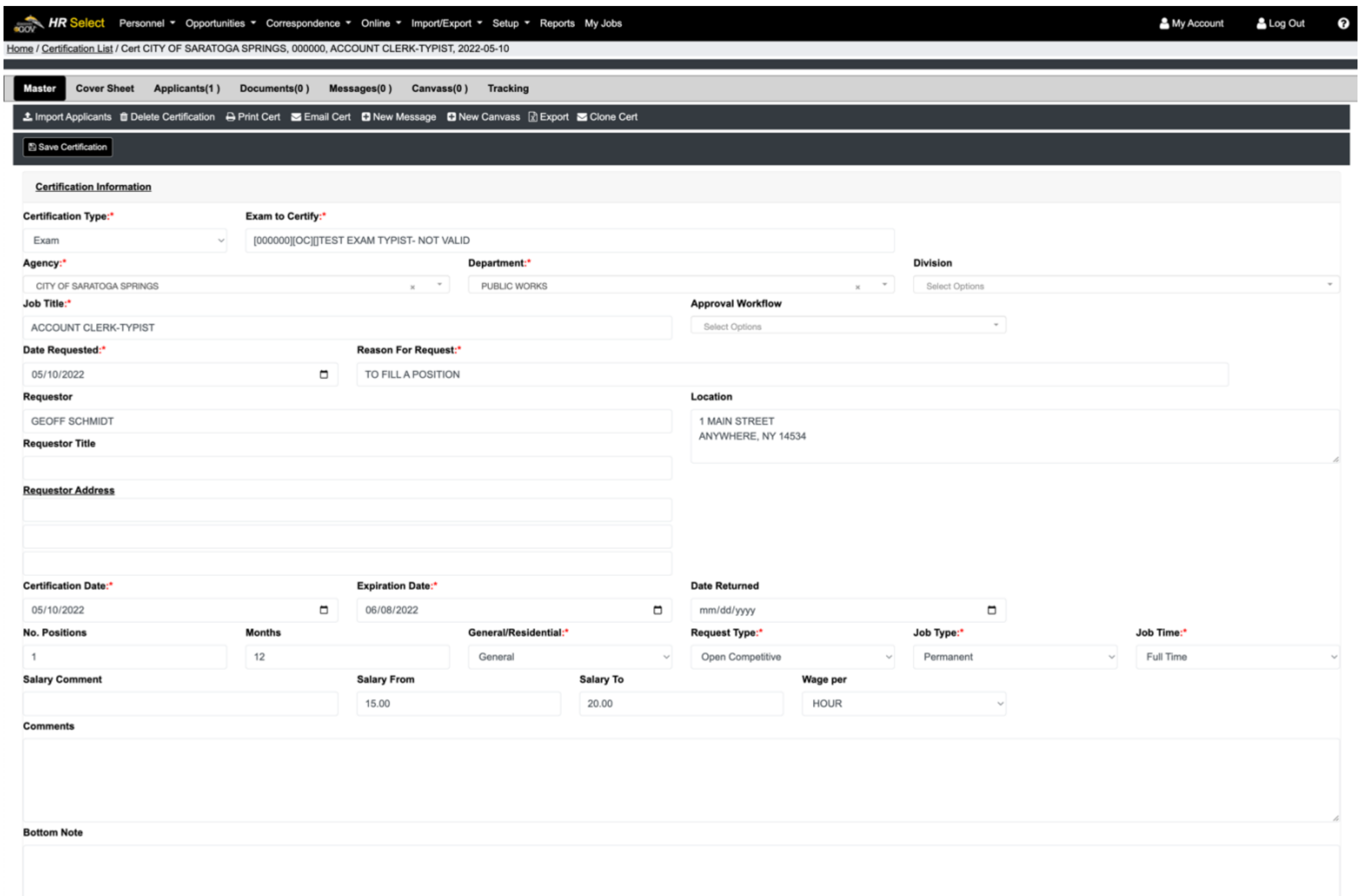
Email Cert – Email the certification

New Message – Creates a new message

New Canvass – Creates a new canvass

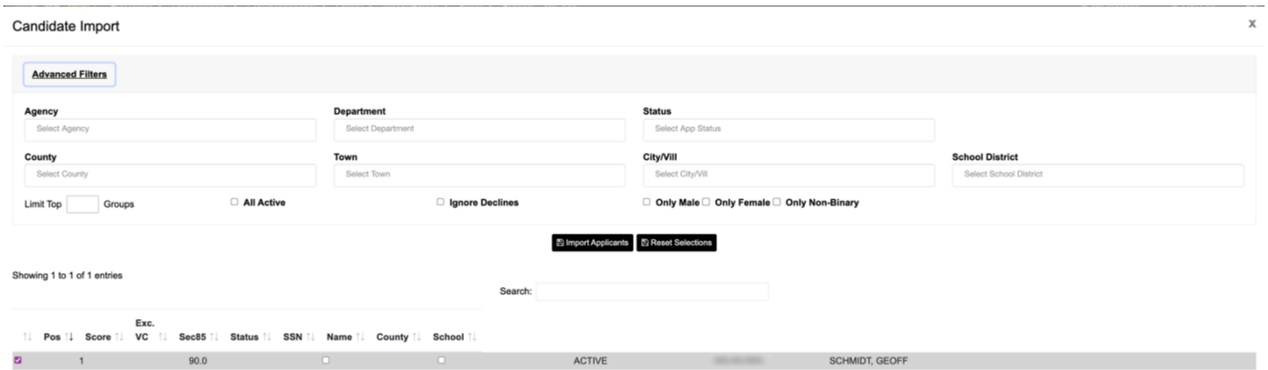
Export – Exports the certification

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



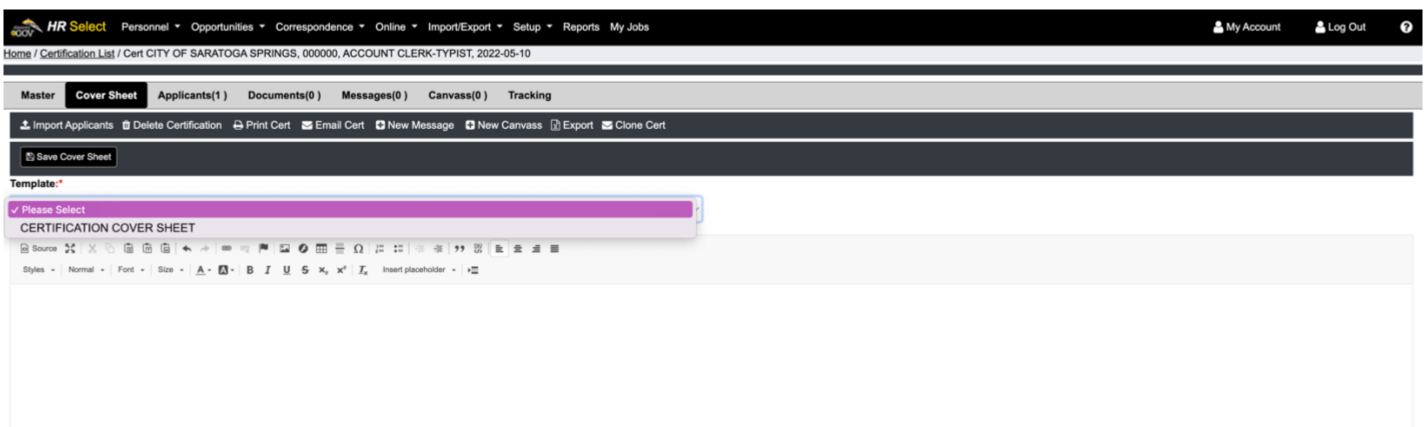
Certifications – Importing Applicants

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.



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.



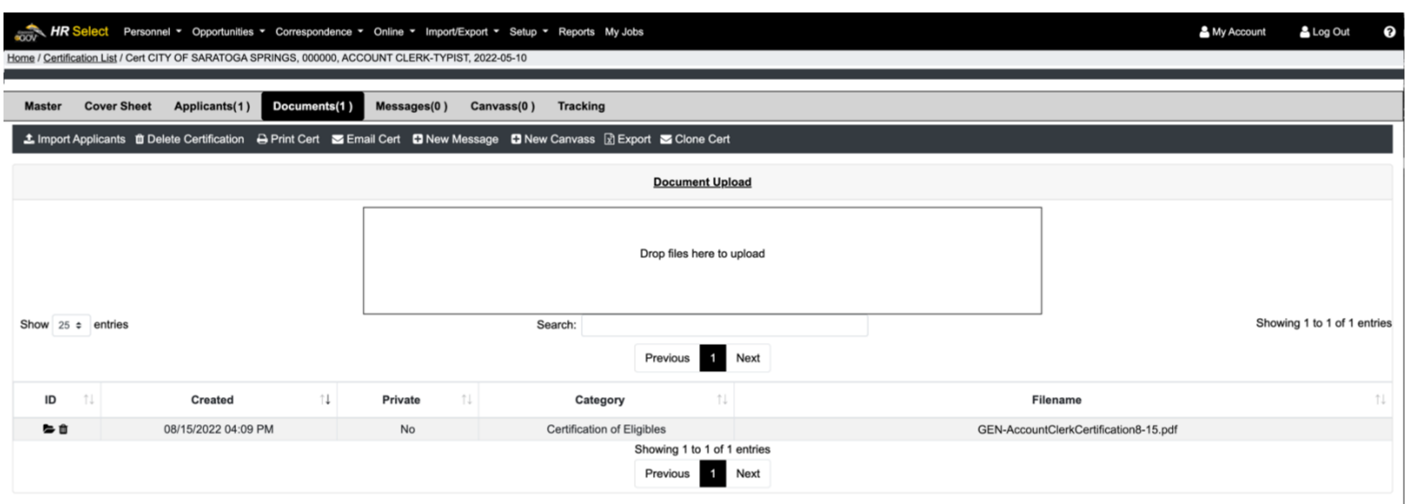
Certifications – Applicants Tab

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.

- **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 certfication
- **Salary** – The salary for this certification
- **Act. Date** – The active date
- **Avail Date** – The availability date of applicant

Certifications – Documents Tab

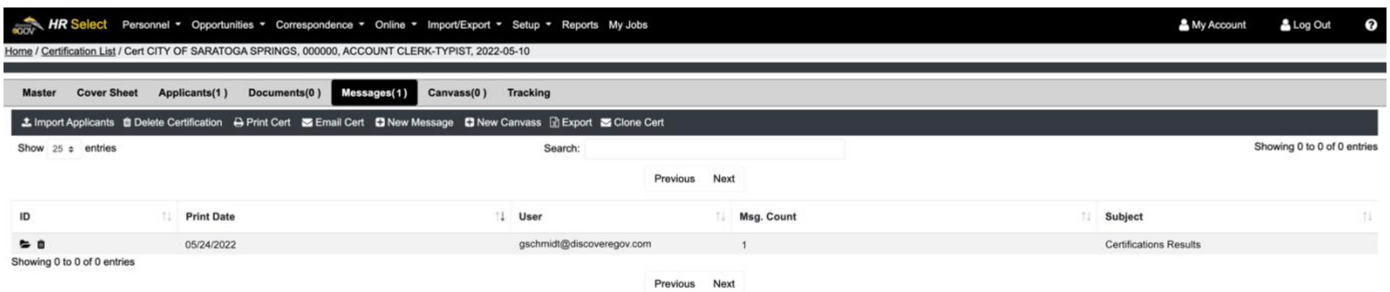
The certifications documents tab is a document upload area for admins to attach documents to this certification. Any number of documents may be attached and categorized for this application. To upload a document you can drag a file from your desktop into the area marked "Drop files here to upload" or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



- **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.



- **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

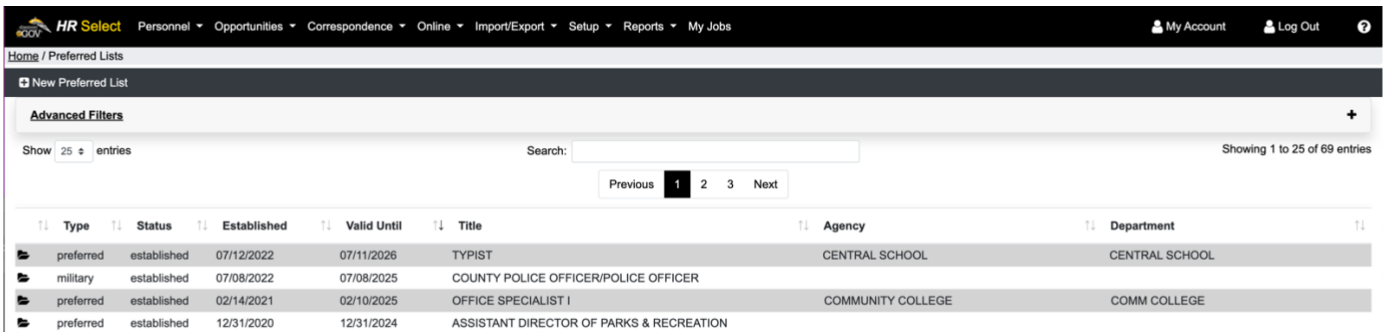
After you setup certification you can canvass on that certification.

Certifications – Tracking Tab

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

Preferred Lists

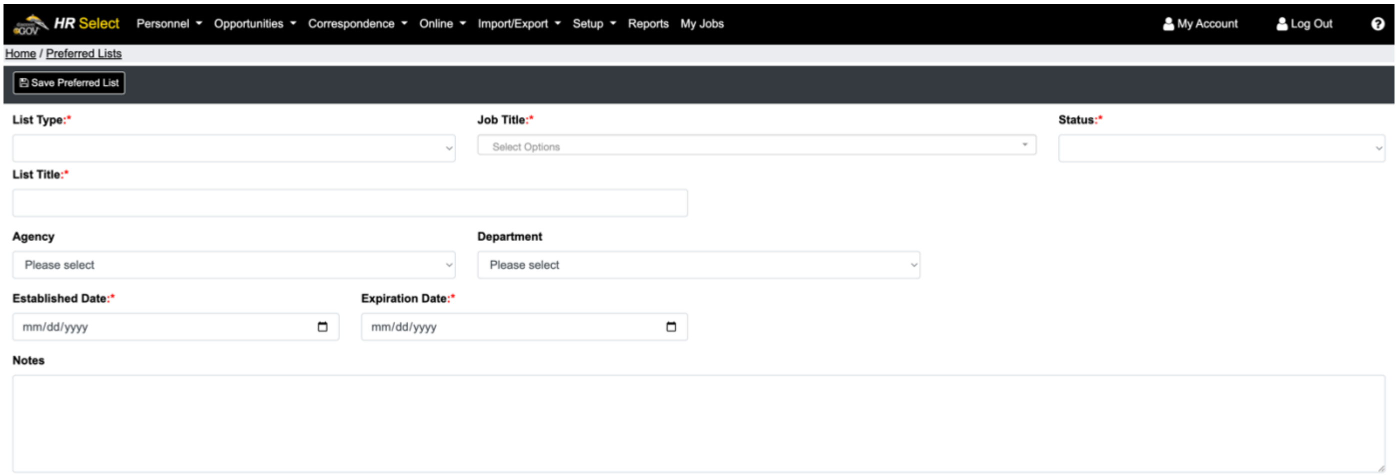
A complete list of all preferred lists in HR Select. Searching can be accomplished using the free form search box. As you began to type an exam title in the search box suggestions will be made.



- **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.

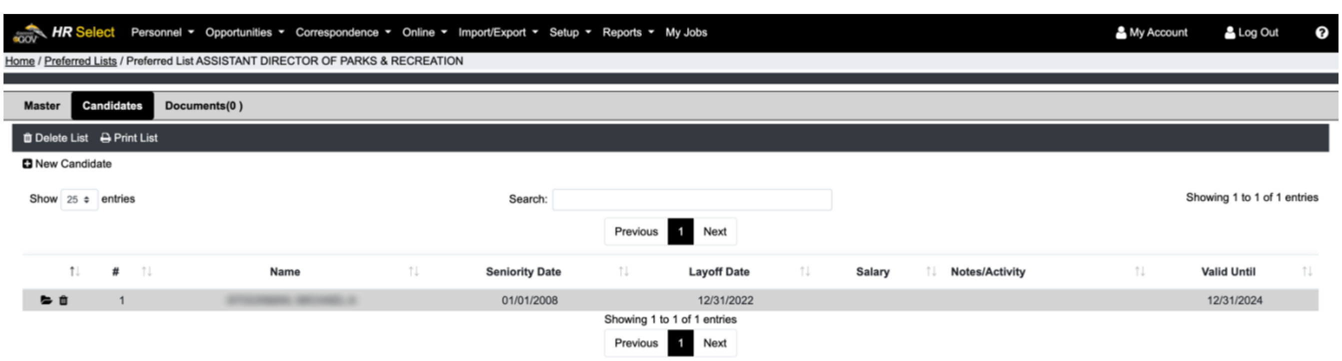


- **List Type** – Preferred or Military
- **Job Title** – Prepopulated list of job titles as you type options will appear
- **Status** – Dropdown of options regarding list: exhausted, certified, complete, etc.
- **List Title** – Title you want to assign to list
- **Agency/Department** – The agency and 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. You 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.



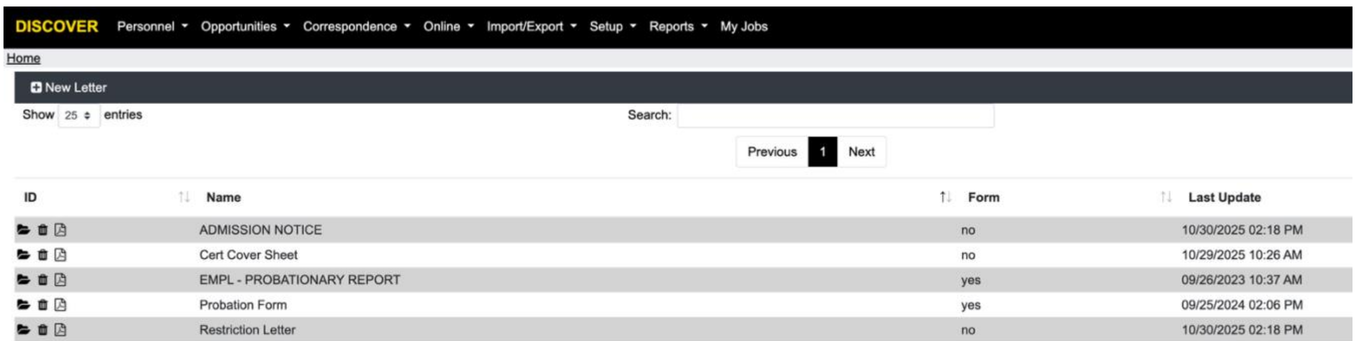
Correspondence

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.



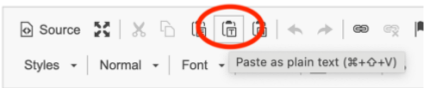
- **<u>Actions</u>** – The folder icon will open the message template for editing, trashcan will delete the template and the pdf icon will open it as a pdf preview to allow you to see what it will look like to the recipient.
- **Name** – Name of the message template.
- **Form** – If the template is a 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

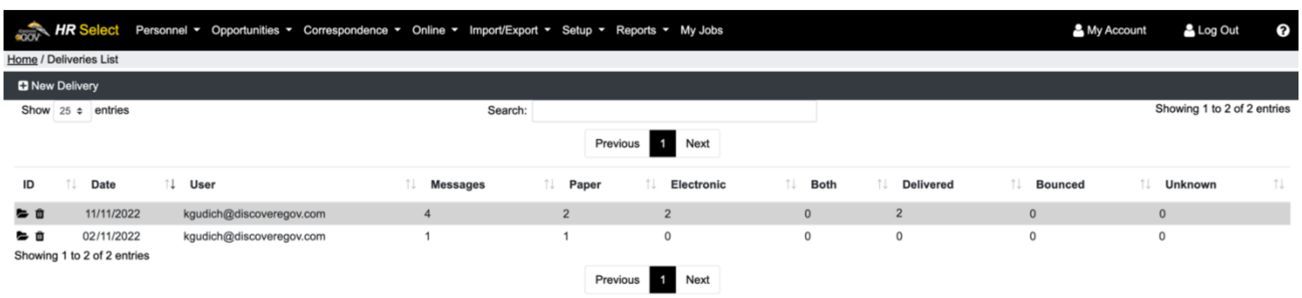
3. Choose the template you want to use and date it should go out

4. Update the letter if necessary (NOTE: this will only update this letter, not the original template)

5. Save Message

Deliveries

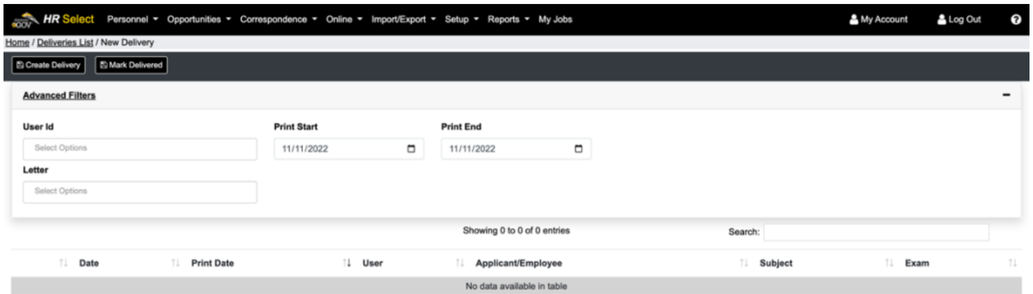
Messages will not automatically send until a delivery is created. Using Correspondence > Deliveries you can setup deliveries for your messages. Deliveries refer to any batch or single delivery of a message either by printing or by email. Whether someone receives a hardcopy, email or both is controlled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



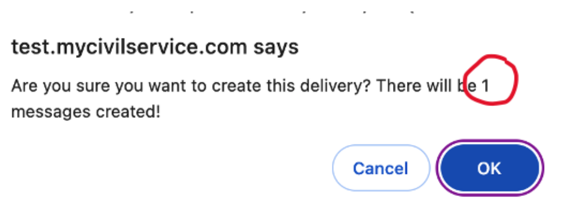
- **<u>Actions</u>** – The folder icon will open the delivery, trashcan will delete the delivery (if the delivery has not taken place yet) and New Delivery will create a new delivery.
- **Date** – Date delivery is scheduled.
- **User** – The user that created the delivery.
- **Messages** – The count 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.



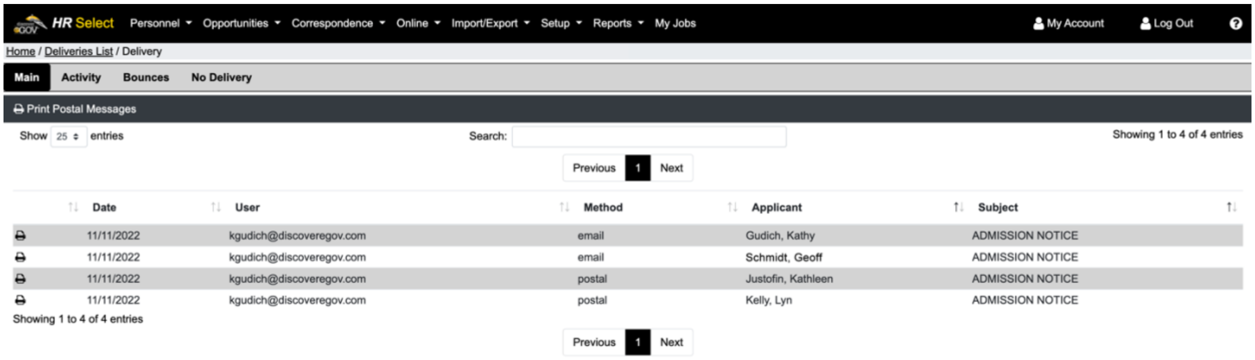
When your selections are done, click 'Create Delivery'. A pop-up will then appear stating how many messages will be created – be sure this number is close to what you expect before you say ok (500 vs 20 letters for example) because once you say ok, there is very little time to delete it if it is wrong – 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.



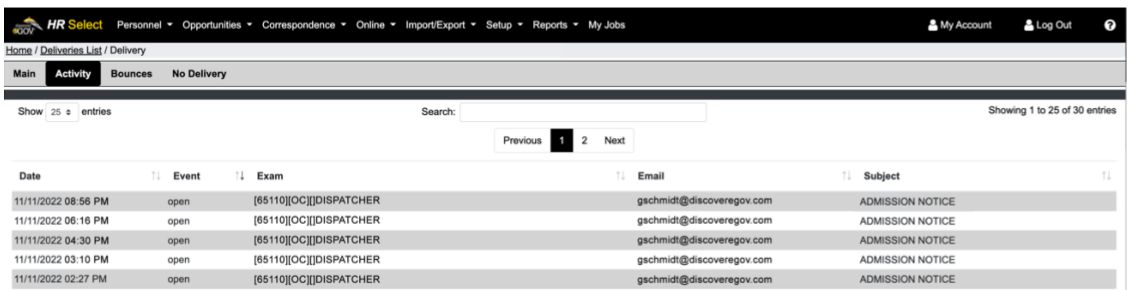
Once you say ok it will take you back to the main delivery screen and you will see the summary of counts for that delivery.

Viewing and Printing Delivery

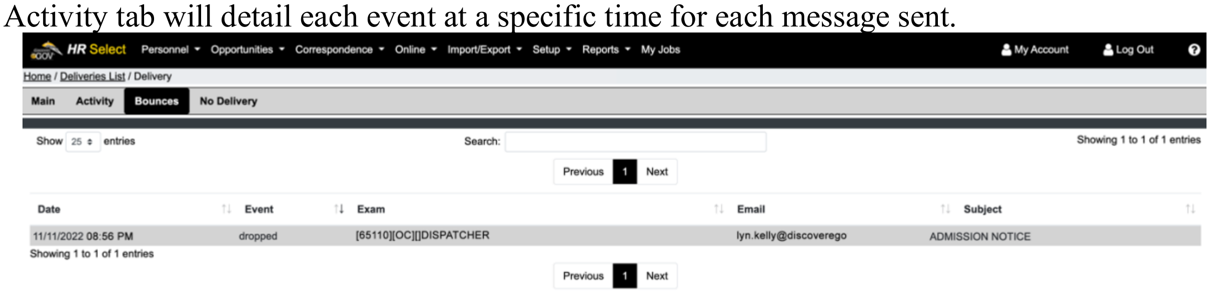
After creating the delivery, you will see that the messages are sorted into those needing to be printed for hardcopy and those that will be emailed on the summary page. The emailed ones will be sent automatically. If there are hardcopy messages in your batch you will click on the folder icon which will 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.



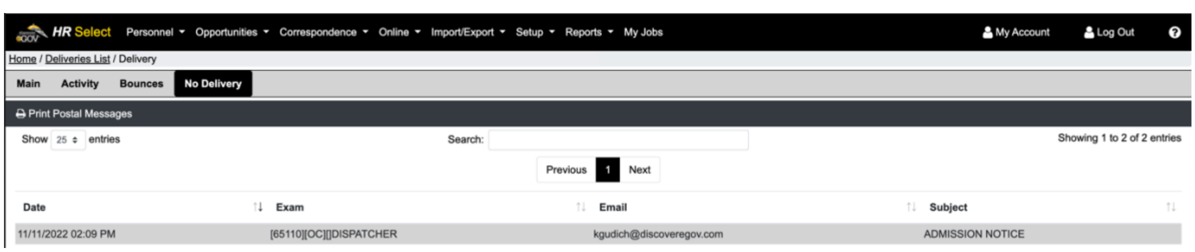
This screen also has tabs for 'Activity', 'Bounces' and 'No Delivery' which allow you to further see more information on the delivery. They track all emails that are sent and when people open them, etc. Each individual applicant in the system also has a tracking tab that contains the same information.



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



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



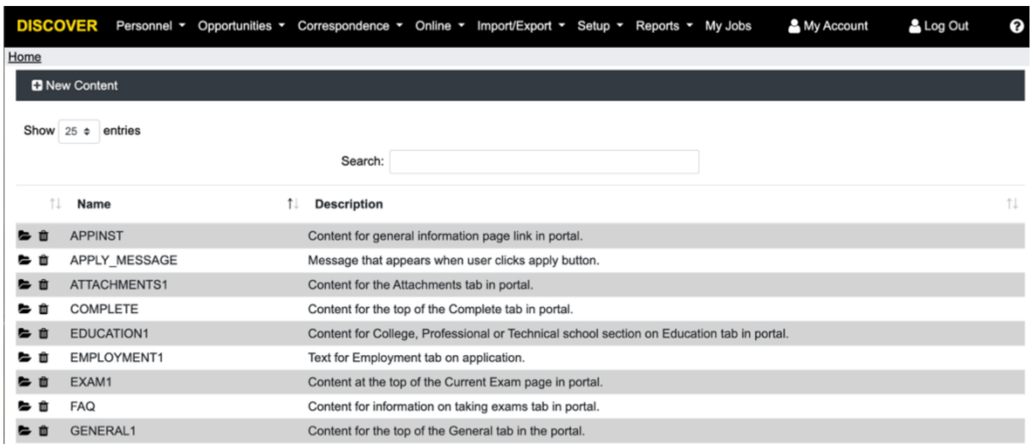
The no delivery tab will display any messages that did not get delivered.

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.

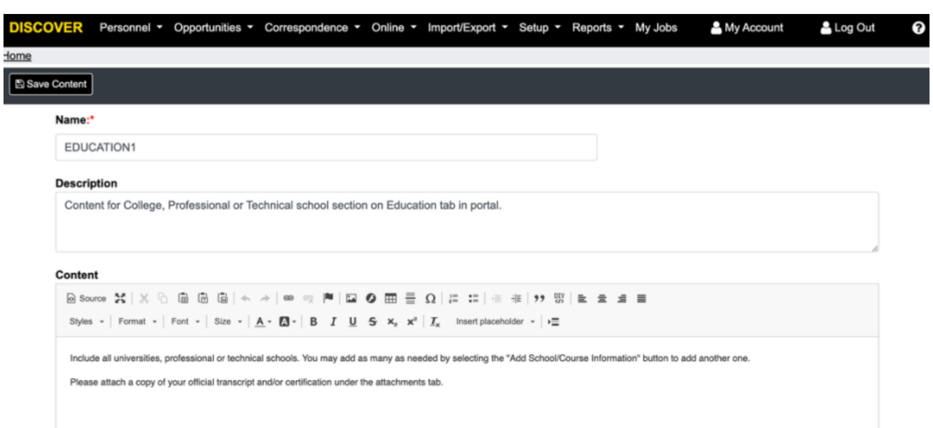
Content

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.



- **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.



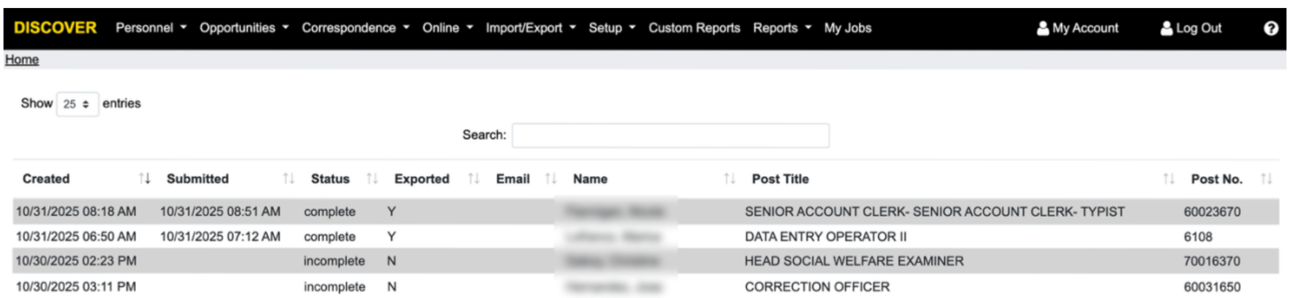
Using the New content button will allow you to create a new section of content however it will not appear on the portal until you submit a ticket to us at our help desk asking us to add that new section to your portal code base.

Online Users

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

Online Apps

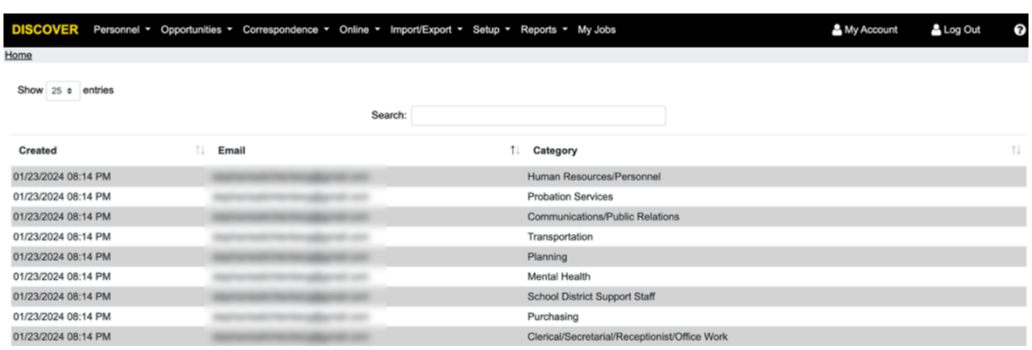
This section provides a view of applications from your portal. It advises when they were created, submitted, their status, if they were exported into your Discover system, name of applicant and title and no from the online post. This area is vital to check periodically to help with reconciling your payments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

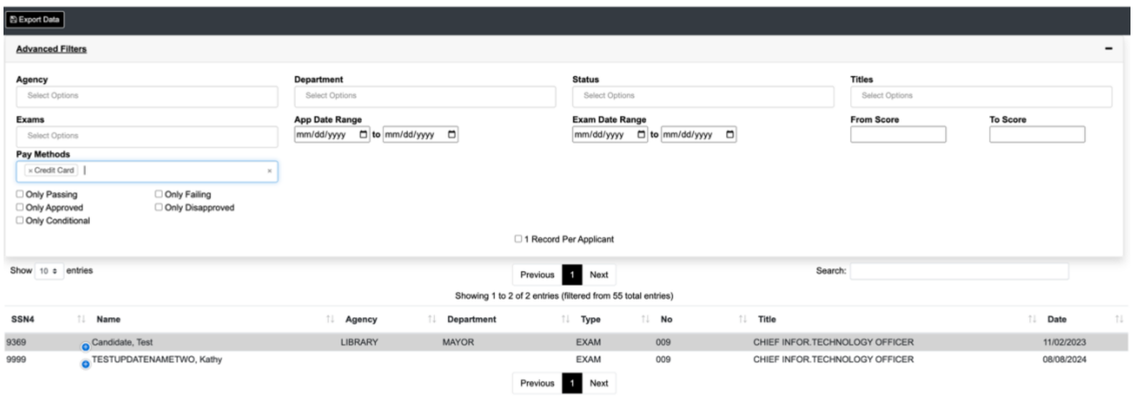


Created	Email	Category
01/23/2024 08:14 PM		Human Resources/Personnel
01/23/2024 08:14 PM		Probation Services
01/23/2024 08:14 PM		Communications/Public Relations
01/23/2024 08:14 PM		Transportation
01/23/2024 08:14 PM		Planning
01/23/2024 08:14 PM		Mental Health
01/23/2024 08:14 PM		School District 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.

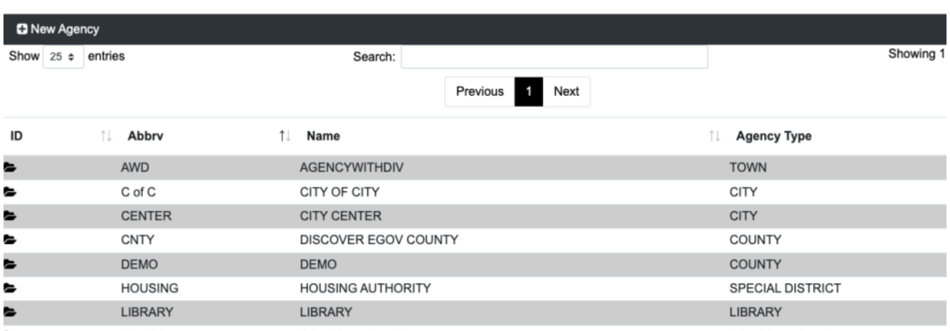


Setup

This area contains basic setup tables that the Discover system uses for many of it's 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.


New Agency

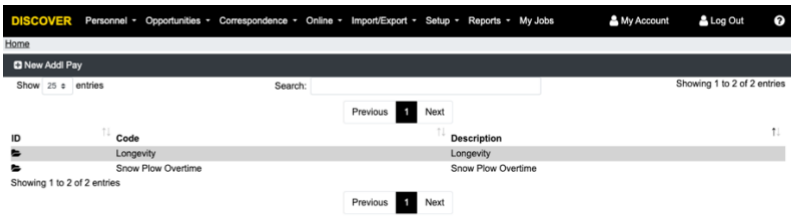
Show 25 entries Search: Showing 1

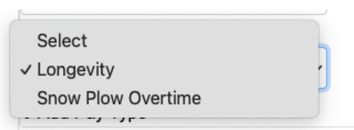
Previous 1 Next

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

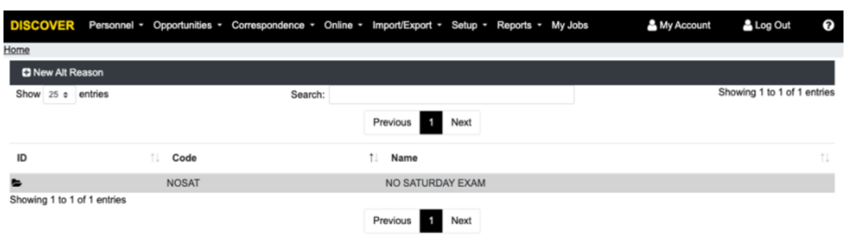
All additional pays that you may need to record in the employee records. Once they are setup they will be available in the "Additional Pay" dropdown field in the employee history screen. To add an additional pay select the "New Addl Pay" text. If you want the pay always included in their total wage then 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.

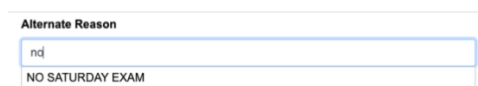




Alt Reasons

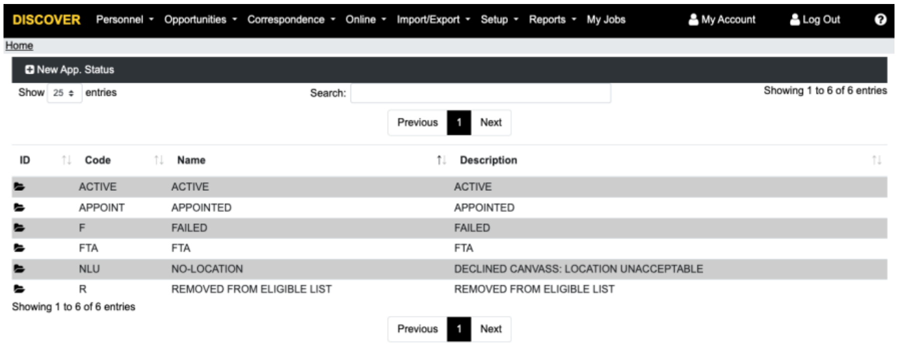
All Alternate Test Date Reasons that may be requested by applicants on an application. Once it is setup it will be available in the "Alternate Reason" field in the application screen. You may type a "*" into the field to see full list of all reasons for selection. To add an additional reason select the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

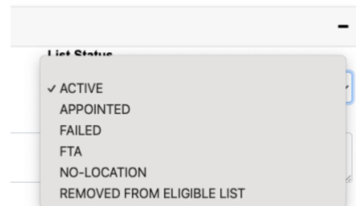




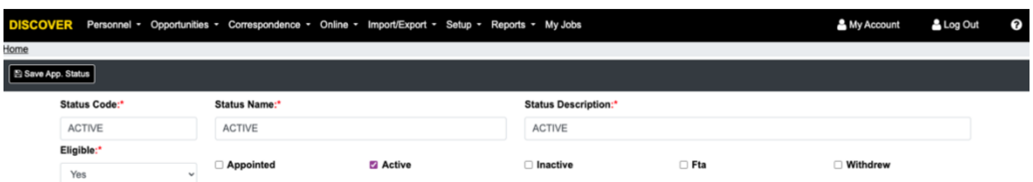
App Statuses

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.



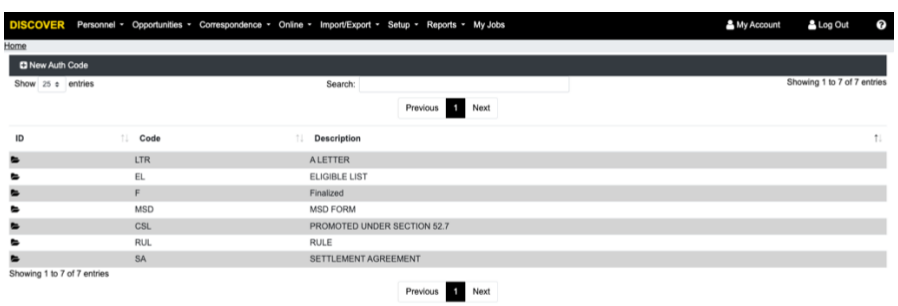


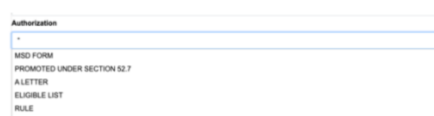
When setting up a new status you want to be sure that the eligible dropdown is set correctly so that the system understands what to do with an applicant set with that specific status. If eligible is set to “yes” they will appear on the eligible list, if it is set to “no” they will not appear on the list 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.



Auth. Codes

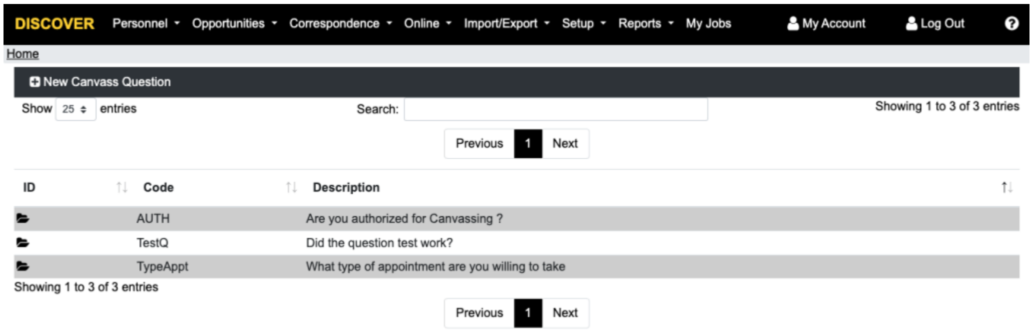
All Authorization Codes you may need to use in your employee history records. Once a code is setup it will be available in the “Authorization” field in the employee history screen. You may type a “*” into the field to see full list of all codes for selection. To add an additional status select the “New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



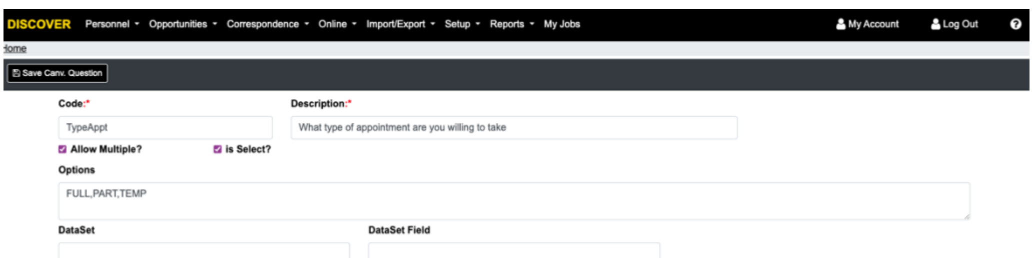


Canv. Questions

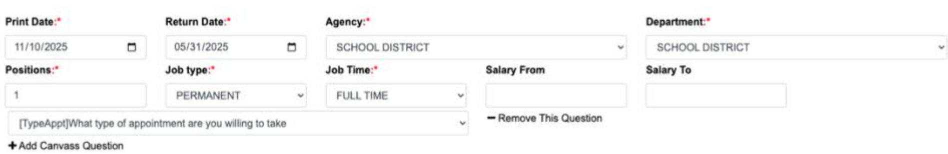
All custom canvass questions you may want to use in addition to your base canvass letter. Setup new question by selecting New Canvass Question link.

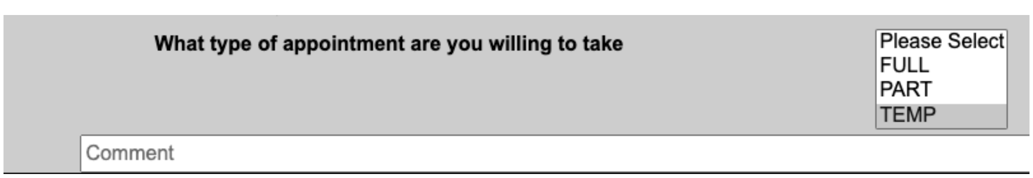


As you setup the question you will list if it is a select type answer (as displayed below; for full, part time or temp work), if multiple answers are allowed, etc. Remember it should match the actual question that you have on your letter template so you can record the answers appropriately.



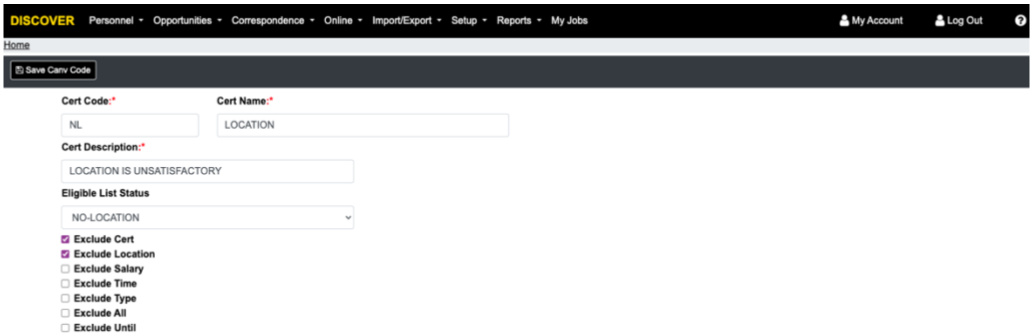
Once a question is setup it will be available to load into a canvass reply section so that you can record any answers you receive.





Canv. Codes

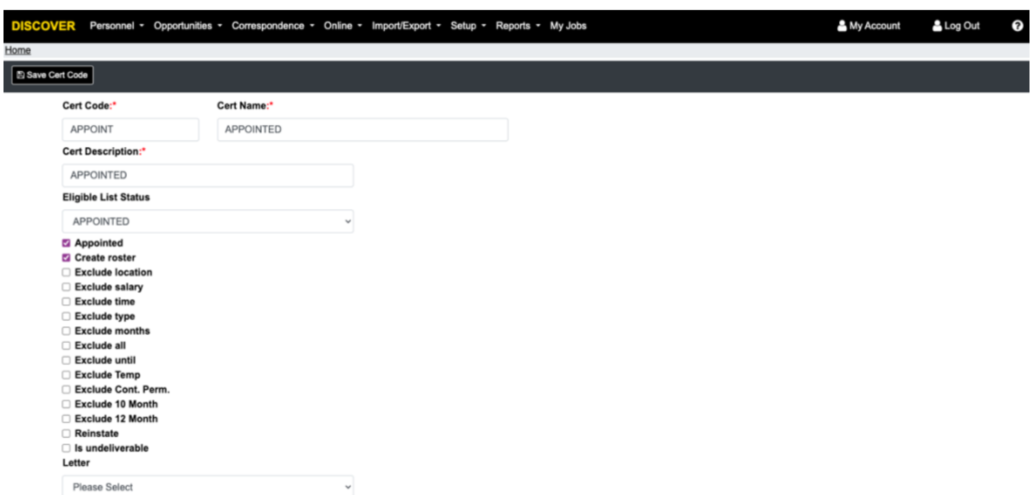
All canvass replies that you need to record. Setup a new reply by selecting New Canvass Code link.



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

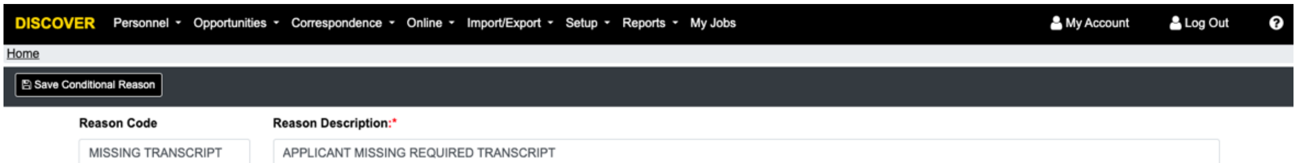
All cert codes you need to track when certifications are returned. Setup a new cert. code by selecting New Cert Code link.



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.

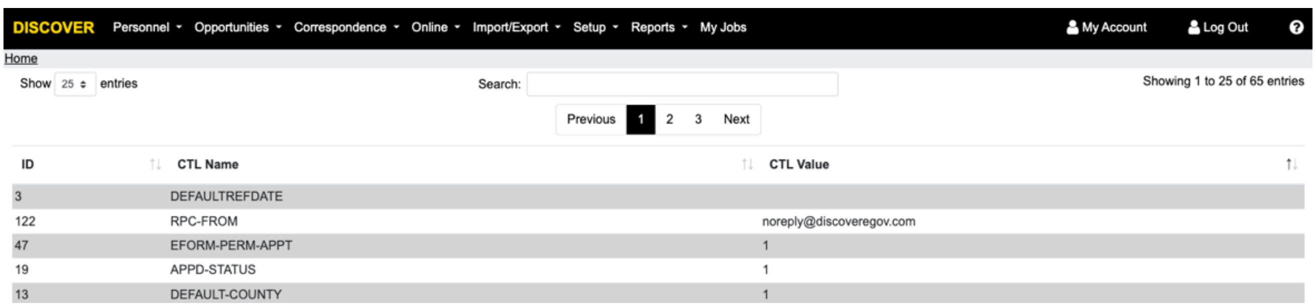
Conditional Reasons

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.



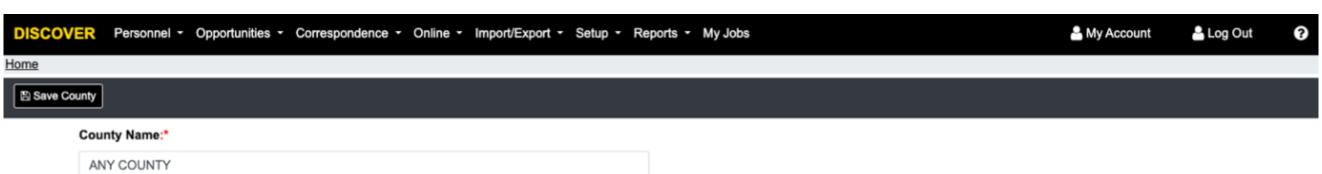
Controls

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.



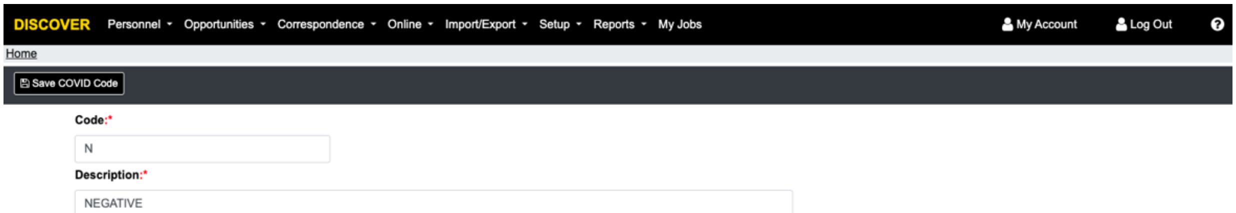
Counties

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.



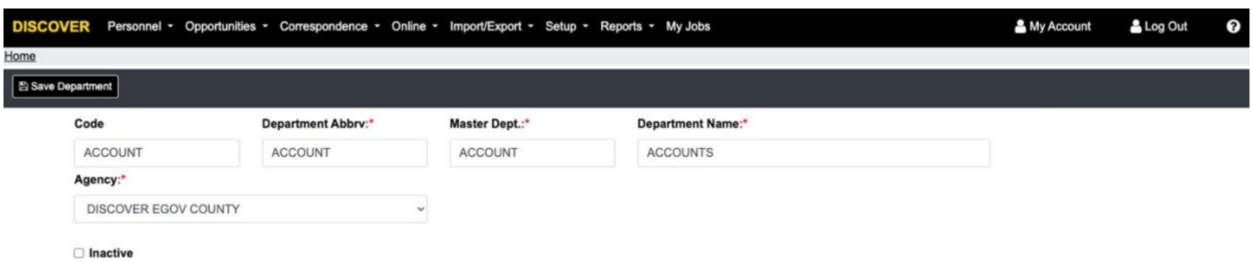
COVID Status

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



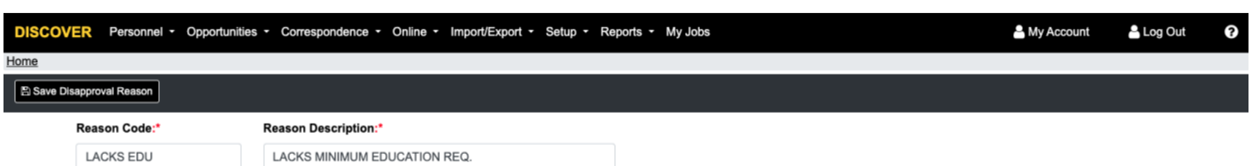
Departments

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.



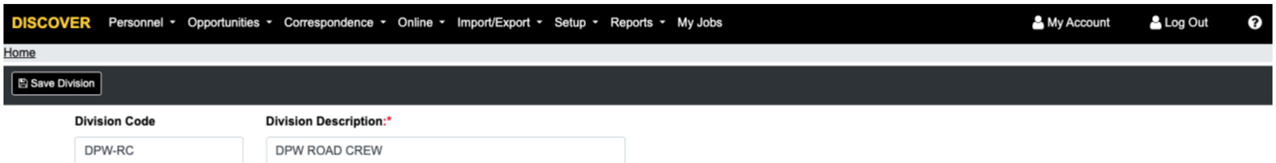
Disapproval Reasons

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.



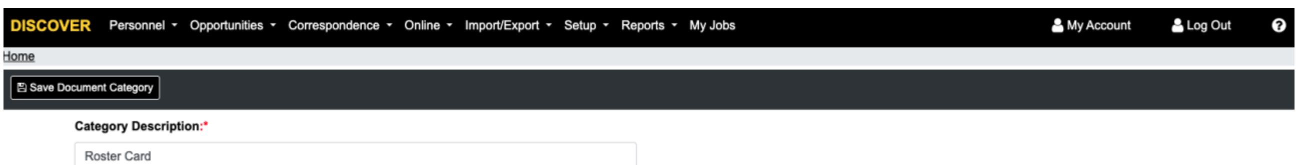
Divisions

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

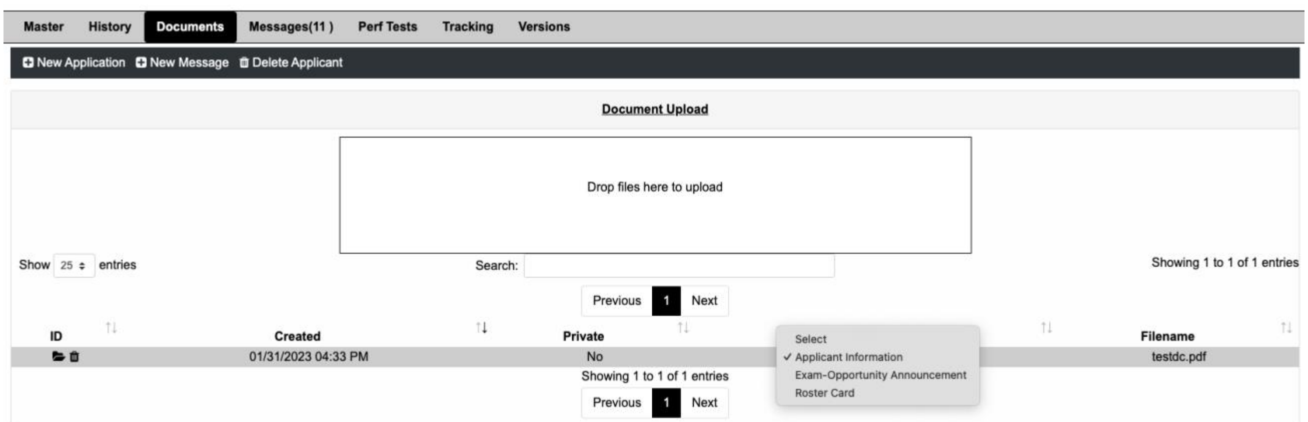


Document Category

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.

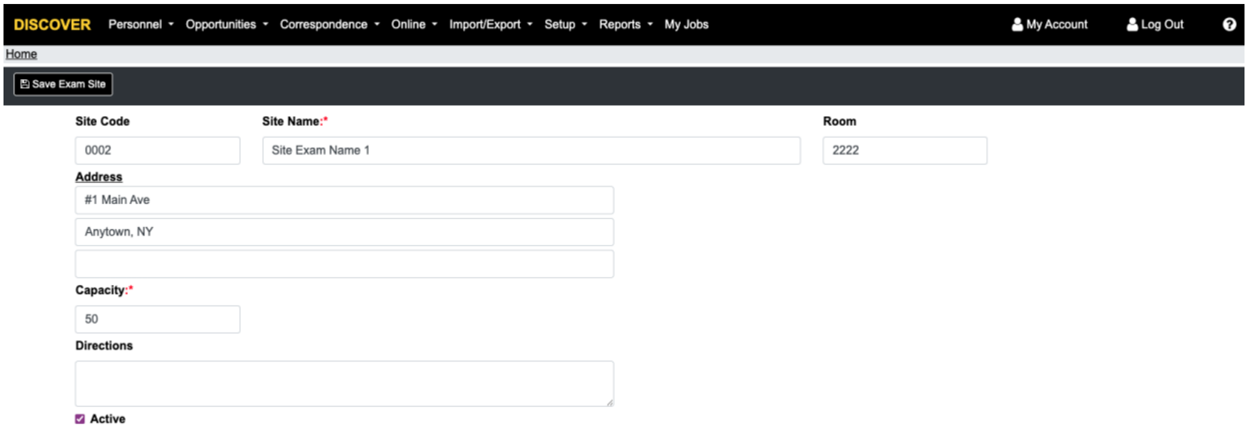


Once a category is loaded it will be available to you in the category column on the documents tab. There you can tag the document so you can see at a glance what types of documents are in that record.

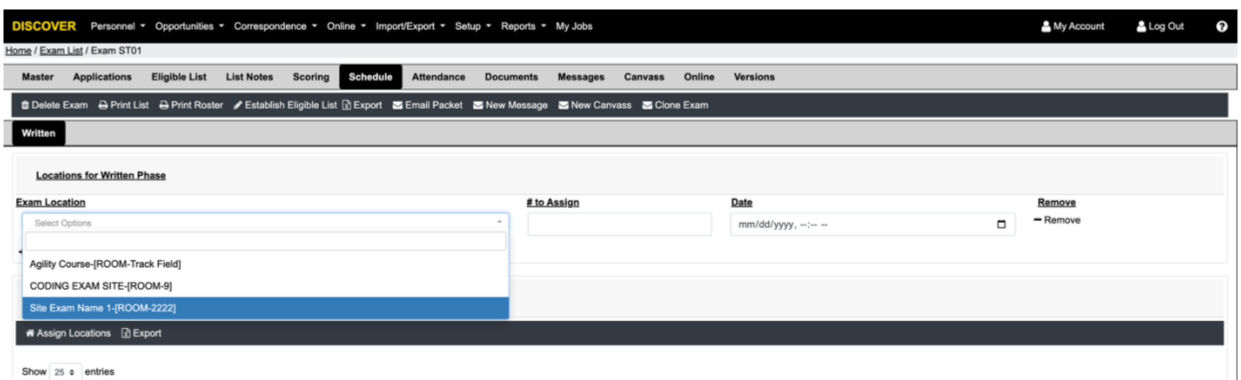


Exam Sites

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.

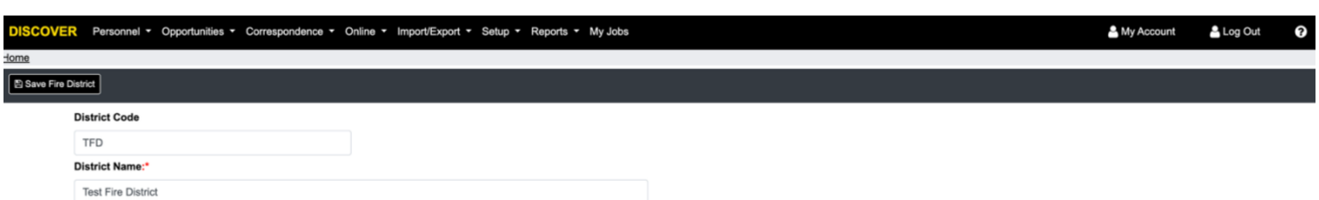


You can load the exam site in the scheduling tab and set the number of candidates to assign to that site and an exam date.



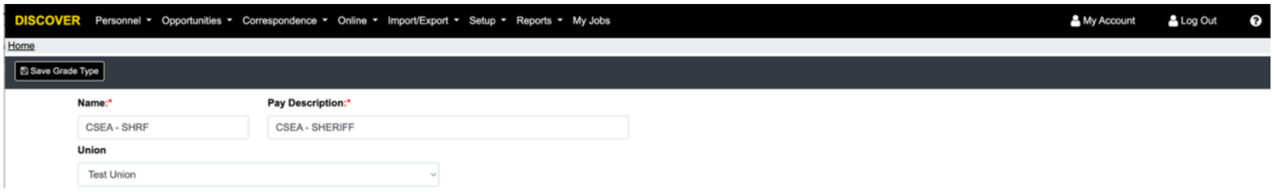
Fire Dists.

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



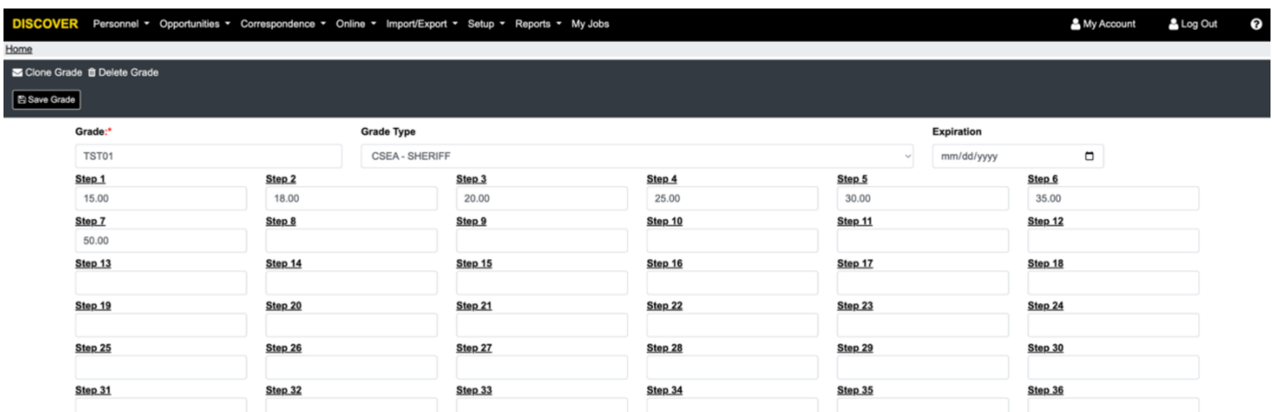
Grade Types

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.



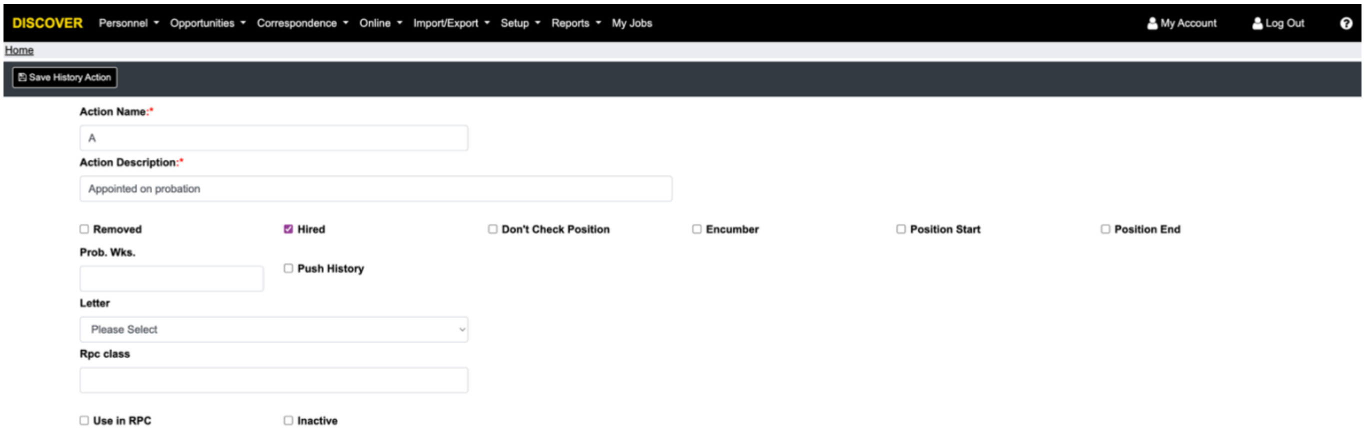
Grades

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.



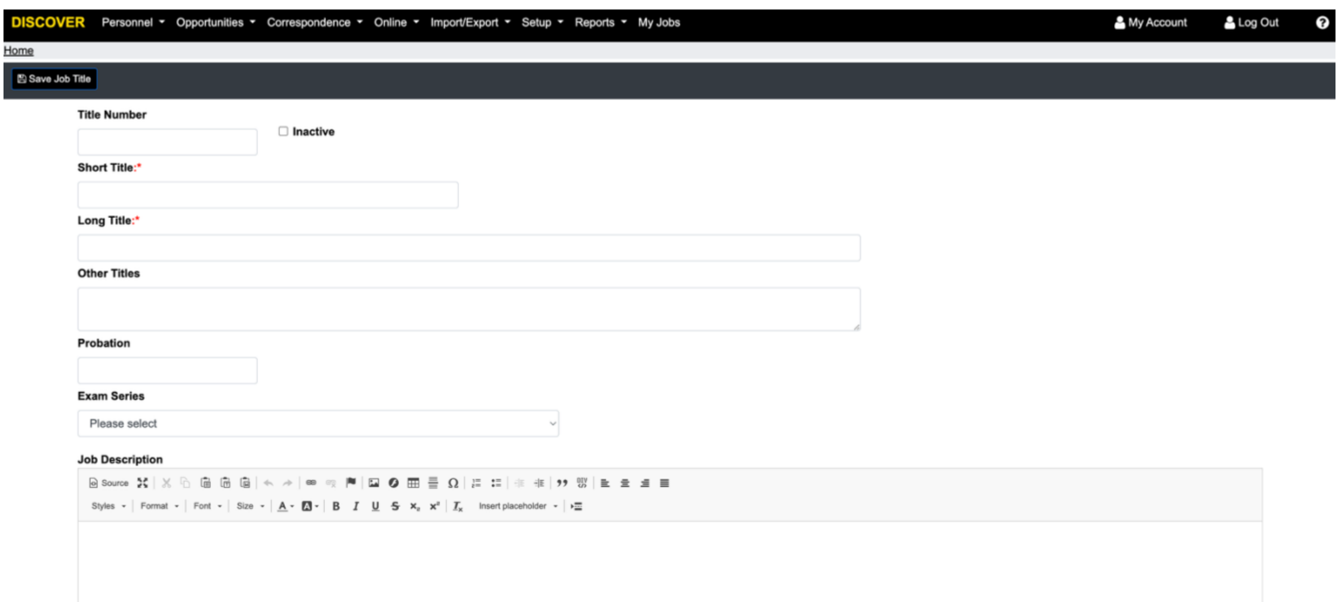
History Actions

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.



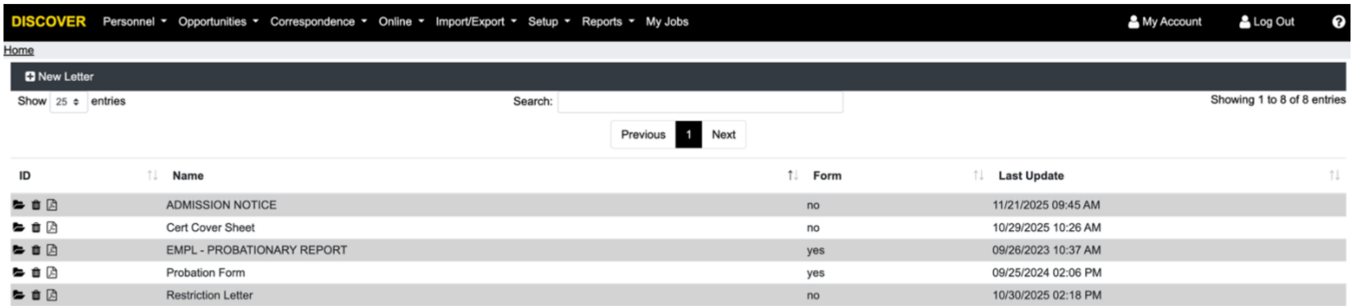
Job Titles

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.



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.



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.