OHC Training Guide Phase 1

Created April 2023 Updated July 2023 v2.0

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Section 1: Creating a Requisition & Requisition Approval

This guide covers the first step in Phase 0 which is creating the requisition. This is done by the agency HRL. Once the requisition is created, the HRL will submit the requisition. OHRM will then review and approve (or deny) the requisition.

 Note: This section assumes that you have already completed Phase 0 where OMB and OHRM have reviewed and approved the position for this requisition. This process was all completed in SAP via the ePRB. Refer to the <u>Recruitment & Hiring Resources</u> for the appropriate links to the relevant guide.

1.1 Creating a Requisition

Shown below are the basic steps needed to successfully create a requisition in NEOGOV.



1.1.1 Create a New Requisition

Note: All fields marked with an asterisk (*) are required fields.

1. Access the OHC from your Dashboard dropdown menu.



2. To start a new requisition, click the plus (+) symbol in the upper right of the window, under your name.



3. Click on the *Requisition* button.



- 4. You are now in the *Create Requisition* window. There are three (3) parts to creating a requisition.
 - a. Create = Where you create the requisition.
 - b. Approvals = Where you start the approval workflow (next section).
 - c. Attachments = Where you attach the required documentation (next section).

At the top of the screen, you have three (3) actions:

- a. Cancel = Clicking this will cancel the creation of the requisition.
- b. Save & Close = Allows you to save your work so that you can come back later to finish it.
- c. Save & Continue to Next Step = You are creating the requisition and are ready to move to the next step in the process.

Create Requisition			X Cancel Save & Close Save & Continue to Next Step
1. <u>CREATE</u>	2. APPROVALS	3. ATTACHMENTS	

1.1.2 Completing the Top Half of the Requisition Form

The Requisition form has several fields. It is strongly suggested that you fill them out in a certain order which will save you time. We will tackle these fields in logical clusters. We will start with the fields in the top portion of the form: Department/Division, Position, Requisition #, Class Spec, Desired Start Date, Hiring Manager, Job Type, List Type, and Number of Vacancies.

* Fields are required. Requisition #	* Department/Division
[Assigned when requisition is saved]	Find a Department/Division Q
* Class Spec ① 4	Working Title 5
Find a class spec Q	
Desired Start Date	* Hiring Manager 7
MM/DD/YYYY	Find a hiring manager
Јор Туре	List Type 9
~	~
Position ① 2	Number of Vacancies
Find a position	0

- 1. Department/Division (#1) Enter enough search criteria to locate the correct Department/Division and then select.
 - Notes:
 - It is strongly recommended that you fill in this field first! You will not be able to find your created position without the correct Department/Division listed.
 - Division = Org Unit in SAP.
- Position Click to see the Position numbers available. If you do not see the Position number you
 are looking for, check that you have entered the correct Department/Division. You will only see
 the available Position numbers for the Department/Division that you entered in the previous
 step.
 - Notes:
 - If there is not Position number selected when you submit the requisition for approval, it will be denied. The unique Position number is what ties SAP and NEOGOV together, therefore, this is a critical field.
 - It is strongly recommended that you fill in this position after selecting the Department/Division instead of filling out the other fields before getting to the Position field. This way, if you have to change the Department/Division field, you won't have to redo all the other fields.

- If you have multiple positions that are in the same division **and** are in the same classification, you can select them. This will save you the trouble of creating a requisition for each one of those.
- 3. Requisition # This will be auto-assigned when you save the requisition.
- 4. Class Spec Select the Class Spec that matches the job title.
- 5. Working Title while this field is not required, it is highly desirable that you put a title in here. This title is what will be posted on the external job boards for prospective candidates to see. Therefore, it should be a title that clearly states to the candidate what will likely be needed in that job.
- 6. Desired Start Date List the desired start date.
- 7. Hiring Manager You can have multiple selections in this field. Therefore, you should select anyone who will be reviewing candidates. Be sure to include yourself (the HRL) and any other HR team members in your agency, even if you are not the hiring manager. You, and your HR team members, need to be listed so that you/them can see the candidates listed in the *My Candidates* section on your Dashboard.
 - Notes:
 - It is a good idea to check with your manager on who needs to be included in this list.
 - If the name of the Hiring Manager you would like to select does not appear, you will need to e-mail <u>OHRMRecruitment@co.pg.md.us</u> to request access for them. Please see *Error! Reference source not found.* in the Error! Reference source not found. se ction for this process.
- Job Type Select the job type from the dropdown. Check the <u>Classification Plan</u> file to find the correct job type probationary plan. If the answer is NA, then select the appropriate Job type. Otherwise, all other job types will have a specific probationary plan (i.e. Probationary FT, Probationary PT).
- 9. List Type This defines how you want your position to be promoted. For the majority of postings, *Regular* is the selection you will need.
- 10. Number of Vacancies Enter the number of vacancies that there are for this job. If you have listed more than one position in the *Position* field, then the number you put here needs to equal the number of positions listed.
 - Note: The field titled *EEO/Census Data Template* is not used.

1.1.3 Completing the Bottom Half of the Requisition Form

Here are the fields in the bottom half of the requisition form which need to be filled out.

 Pey Grad Type In a search term Clo Category 3 Type In a search term Close Coce 5 Type In a search term Close Coce 6 Minimum Request Compensation: * Maximum Request Compensation: * Maximum Request Compensation: * Maximum Request Compensation: * Statis for a non-competitive positing (i.e. LTGF, 1000HR Beasonal Temporary, horse: Hyou select Type you must enter the secreted candidate(s) name in the Expected Candidate(s) for the secret term * Maximum Request Compensation: * Statis for a non-competitive positing (i.e. LTGF, 1000HR Beasonal Temporary, horse: Hyou select Type you must enter the secreted candidate(s) name in the Expected Candidate(s) for the secret term * Non * Non * Statis for a non-competitive positing (i.e. LTGF, 1000HR Beasonal Temporary, horse: Hyou select Type you must enter the secreted candidate(s) name in the Expected Candidate(s) for the secret term * Non * Non * Non * Vescory Date (incumbents last day) * Non * Non * Non * Non * Non * Statis for a non-competitive position; * Non * Non		
Type is a search term Type is a search term Eto Category Type is a search term Type is a search term * Cless Coce • Maximum Request Compensation: * Maximum Request Compensation: • Maximum Request Compensation: • Maximum Request Compensation: • Maximum Request Compensation: • Maximum Request Compensation: • Maximum Request Compensation: • Maximum Request Compensation: <td>* Pay Grade</td> <td>Union 2</td>	* Pay Grade	Union 2
EIO Category 3 Type In a search term • Class Coce 5 • Maximum Request Compensation: • Maximum Request Compensation: • Is this for a non-competitive posting (i.e. LTOF, 1000HR Seasonal Temporary). Note: If you select "If you must enter the expected Candidatesy interview of the c	Type in a search term 🗸	Type In a search term 🗸
Type in a search term Type in a search term Type in a search term Type in a search term Type in a search term T	EEO Category	Affirmative Action Objective
 Class Code Maximum Request Compensation: Maximum Request Compensation: Is this for a non-competitive positing (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Ver", you must enter the expected Candidate(s) name in the Expected Candidate(s) field. Veta No Position Details New Position? Yes No (P Add Position Detail (P Add Position Detail	Type in a search term	Type In a search term
* Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select * Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select "Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary). Not: If you select Postion Details New Position? () Add Position Detail	* Class Code 5	* Minimum Request Compensation:
 * Maximum Request Compensation * Is this for a non-competitive positing (i.e. LTGF. 1000HB Sessonal Temporary), Note: Hyou select Vest', you must enter the expected candidate(s) name in the Expected Candidate(s) field. Yes No * Is this for a non-competitive positing (i.e. LTGF. 1000HB Sessonal Temporary), Note: Hyou select Vest', you must enter the expected candidate(s) field. Yes No 		
Processed Candidates; Presse enter the name of the candidates; you want to hire into this non- competitive position. Incumbent Last Name Incumbent Last Name Position Details New Position? Yes No O Add Position Detail	* Maximum Request Compensation:	* Is this for a non-competitive posting (i.e. LTGF, 1000HR Seasonal Temporary), Note: If you select "Yes", you must enter the expected candidate(s) name in the Expected Candidate(s) field.
Expected Candidate(s), Please enter the name of the candidate(s) you want to hire into this non- competitive position. Incumbent Lass Name 11 Position Details New Position? Ves No Or Add Position Detail	9	
competitive position. Incumbent Last Name I Vacancy Date (incumbents last day) Position Details New Position? Ves No	Expected Candidate(s). Please enter the name of the candidate(s) you want to hire into this non-	Incumbent First Name
Incumbert Last Name Incumbert Last Name I Vecancy Date (incumberts last day) Position Details Ves No O Add Position Detail		
Incumbernt Last Name 11 Vacancy Date (incumbernts last day) 12 Position Details New Position? Ves No O Add Position Detail		
Position Details New Position? 13 O Yes No Position Detail O Yes Add Position Detail	Incumbent Last Name	Vacancy Date (incumbents last day)
Position Details New Position? 13 O Yes Image: No Image: Original Action Detail Image: Original Action Detail		
Position Details New Position? 13 O Yes No		
New Position? 13 O Yes No	Position Details	
Yes No O Add Position Detail	New Position? 13	
Add Position Detail	🔿 Yes 💿 No	
	Add P	osition Detail

- 1. Pay Grade Select the pay grade for the position.
- 2. Union Select the appropriate union for the position (optional).
- 3. EEO Category Select the EEO category (optional).
- 4. Affirmative Action Objective Select the category for the Affirmative Action Objective (optional).
- 5. Class Code If you aren't sure of the Class Code, click on the entry for the Class Spec to see what the Class Code is (red circle in screenshot below).
 - a. To access the Class Spec, click on the Class Spec that you entered in the top half of the screen as shown below (red arrow).

Requisition Details	
* Fields are required. Requisition #	
[Assigned when requisition is saved]	
* Class Spec ① Account Clerk 2A (20000391) ③	Q



b. The *Class Spec Details* window will pop out on the right side of your screen.

Class Spec Details	Print Close
Description Benefits	
Class Code 20000391 Class Spec Account Clerk 2A	
Salary \$32,056.00 - \$62,065.00 Annual	y
Established Date Rev	ised Date

- 6. Minimum Request Compensation Enter the minimum amount which will be used when posting the compensation range for the position. This should be the budgeted amount your agency has for the position. The full range can be found on the *Class Spec Details* (see green square above).
- Maximum Request Compensation Enter the maximum amount which will be used when posting the compensation range for the position. This should be the budgeted amount your agency has for the position. The full range can be found on the *Class Spec Details* (see green square above).
- 8. Is this for a non-competitive posting...? This relates to postings such as LTGF or 1000HR Seasonal Temporary). Select the appropriate radio button.
- 9. Expected Candidate(s) Enter the name(s) of the candidates you want to hire into this noncompetitive position.
- 10. Incumbent First Name This field is only used if the position is for a backfill and you know when the person is leaving the position.
- 11. Incumbent Last Name See explanation above for *Incumbent First Name*.
- 12. Vacancy Date (Incumbent's last day) OHRM will check this field, along with the Incumbent's name, if they notice that the position is currently listed as full. If this field (and Incumbent Name fields) are empty, the TA will reach out to you for clarification on why the position is currently listed as full but you are submitting a requisition for this position.
- 13. Position Details The remaining section of the *Requisition* form is the *Position Details*. This section is currently not used and can be skipped.

You are now ready to move to the next major action – Approval Workflow.

1.2 NEOGOV Requisition Approval Workflow: OHRM Talent Acquisition Approvals

The OHRM Talent Acquisition approval workflow is done within NEOGOV. There are two groups who are responsible for the workflow process. The first group is the Human Resource Liaison (HRL) and the second group is the OHRM Talent Acquisition Analyst (TA Analyst). Shown below is an illustration of the workflow steps involved for each group. The specific details, with screenshots, follow the workflow illustrations. These described in the order that the steps need to be executed. The first will be the HRL section (Human Resources Liaison (HRL) Role), followed by the TA Analyst section (Talent Acquisition (TA) Analyst Role).

HRL Component:





TA Analyst Component:



1.3 Human Resources Liaison (HRL) Role

1. Once an HRL enters a new requisition, there will be a default Approval Workflow. No action is needed from the HRL at this point. Just click select "Save & Continue to Next Step."

Create	Requisition	X Cancel Save & Close Save & Continue to Next Step
1. CREATE	2. APPROVALS 3. ATTACHMENTS	
	Approval Workflow * Fields are required.	
	⊙ Add Approval Group	

- 2. The HRL attaches the required documents. This is accomplished by either dragging the documents onto the box in the window or clicking the "Browse" link to locate and attach the documents. Once this is completed, select "Save & Submit" to move to the next step.
 - Required documents are:
 - i. Job Announcement Form (JAF)
 - ii. Approved ePRB Position Request Form (PRF) this form must show that both OMB and OHRM approved the ePRB request.
 - iii. Position Description (544)

Create Requisition	X Cancel Save & Close Save & Submit
1. CREATE V 2. APPROVALS V 3. ATTACHMENTS V	
Add Attachments	
$\bigcirc \bigcirc \bigcirc$	
Drag and drop file here, or <u>click here to upload</u>	
Supported tile types are omp, doc, docx, git, jpe, jpeg, jpg, pdt, png, tit, titr, xis, xisx The maximum allowed file size is 10MB.	

- 3. Once the requisition is submitted, it will show up under the "My Requisitions" Tab in the OHC Dashboard. The following options will be displayed:
 - In Progress: If a requisition is pending OHRM approval.
 - Approved: If a requisition was approved by OHRM.
 - Draft:
 - i. If a requisition was denied by OHRM, it will be directed back to the HRL's OHC dashboard and the HRL will receive an e-mail.

ii.	ii. A requisition can also be in this status i	f the HRL has not submitted it to OHRM.

My Requi	sitions VIEW ALL >								٩
	4 Total	C Dra) aft	In	0 Progress	3 Approve	d	1 Ope	n
Req # 💠	Requisition Title	\$	Department	¢	Division 🗘	Position Code 🗢	Hiring Manager	Approval	Created On 👻
06524	Approved Financial	Analyst	Department of Hea	alth	Accounts Payable	30000108 +1 More	Amy Jaslow	✓ Complete	03/24/2023
06523	Approved Project M	fanager	Office of Human R	esources Mgmt	HR Agency Operations	30004841	CHRISTI CRIST	✓ Complete	03/17/2023
06465	Open Construc	tion Standards In	Permitting Inspecti	ions Enforce	Residential South Distric	t 30050281	Chonnie Harper	✓ Complete	12/13/2022
06444	Approved Public Sa	afety Emergency	Office of Homelan	d Security	New Hire Unit	30004816 +2 More	Kelly Marshall	✓ Complete	12/07/2022

- 4. If a requisition is denied by OHRM, the HRL will need to select the requisition under "My Requisitions." Once the Requisition Details page appears (shown below), go to the "Approvals" tab. There you will be able to review the comment left by the OHRM TA Analyst.
 - Click "Edit" and make the necessary adjustments. Then follow steps 1 & 2 to resubmit the requisition to OHRM.



1.4 Talent Acquisition (TA) Analyst Role

1. Once the requisition is submitted, the OHRM TA team that is within the approval group will receive an e-mail from NEOGOV letting them know they need to log into NEOGOV OHC and approve the requisition. Below is a sample email of what the OHRM TA Analyst will receive.

*** NOTE: This email was sent from NEOGOV ***	

PLEASE DO NOT REPLY TO THIS EMAIL	
If you reply to this email, your reply will *NOT* be read. Instead,	
please contact the individual(s) listed at the bottom of this email	
if you have questions.	

Hi	
Requisition# 06775 has been created on 04/12/23 and requires your approval now.	
Class Title: Community Developer 1G	
Working Title: Community Developer 1G	
Desired Start Date:	
Department: Department of Health	
Division: Recovery Clubhouse	
Hiring Manager(s):	
Sonia Johnson	
Jacqueline Somerville	
Joe Woods	
Shalita Wells	
Jean Gbetibouo	
Ololade Olakanmi	
Charleszette Ferguson	
Taylor Wilder	
Felecia Howard	
Tomeicka Branson	
To view the details of this requisition, please go to https://secure.neogov.com/insight/login.c	fm
If you have any questions regarding this recruitment, please contact:	
Jean Gbetibouo (HR Liaison)	

2. The designated TA Analyst will go to the OHC dashboard and locate the requisition in question under "My Tasks."

Dashboard Jobs ~												
	My Tasks	VIE	W ALL >								C	٦
		1 Total					1 Requisition Approval					
	Туре	¢	Related To	¢	Date Assigned 🔺	Du	ie Date	¢	Department	¢	Division	÷
	Approval		Req Account Clerk 1A (05370)		07/22/2022				Office of Human Resources Mgmt		HR Agency Operations	
										ŝ	showing 1 - 1 of 1 items	\rightarrow

- 3. The TA Analyst will need to click on the requisition title under "Related To." A Requisition Approval window will appear. The TA Analyst will be able to review the requisition details and attachments and then approve, deny, or hold the requisition.
 - Before approving, the TA Analyst must ensure that the requisition has the following:
 - i. Position Number
 - ii. Accurate Classification Specification
 - iii. Required Attachments (as listed in Step 2 of the HRL role)
 - iv. The position is listed as vacant. If not, the incumbent information must be entered.



Requisition Approval Auditor (06528)			Cancel 🖉 Edit
✓ Approve × Deny Hold			
Requisition Details		Approval Timeline	2
Requisition Number 06528	Department Department of Health	Pending Talent Acquisition	
Title	Division		
Auditor	HD Adm Audit		
Class Spec Auditor 5G	Vacancies O		
A	and the second sec		

2A. *If Approved:* The TA Analyst will have the option to add comments and then will select "Submit." Once approved, the task will be removed from the "My Tasks" list and the requisition will show up on the Insight site under "Approved" requisitions.

ashboard Jobs ∼	Requisition Approval Account Clerk 1A (05370)	Cancel Z Edit
	Approve X Deny II Hold Comment (Optional) Add a comment	Submit
	Requisition Details	Approval Timeline

2B. *If Denied:* The TA Analyst will select to send it back to the HR Liaison who created the requisition and add specific comments as to why it was denied.

nboard Jobs Y	Requisition Approval Account Clerk 1A (05370)		Cancel 🖉 Edit
	Approve X Deny II Hold required fields are marked with esterisk Send Back to Step * HR Liaison - CRIST CHRISTI	Comment (Optional) Add a comment	Submit
	Requisition Details		Approval Timeline

2C. *If on Hold:* This option should only be marked if the HR Liaison reaches out directly to the TA Analyst and asks to put the requisition on hold. This status also will require OHRM Director approval before allowing it to be selected.

Once the requisition has been approved, the process moves to Phase 2 – Job Announcement Posting and Candidate Evaluation. This phase is handled entirely by ORHM; therefore, we will now move to Phase 3 – "Handling a Referred List of Candidates."