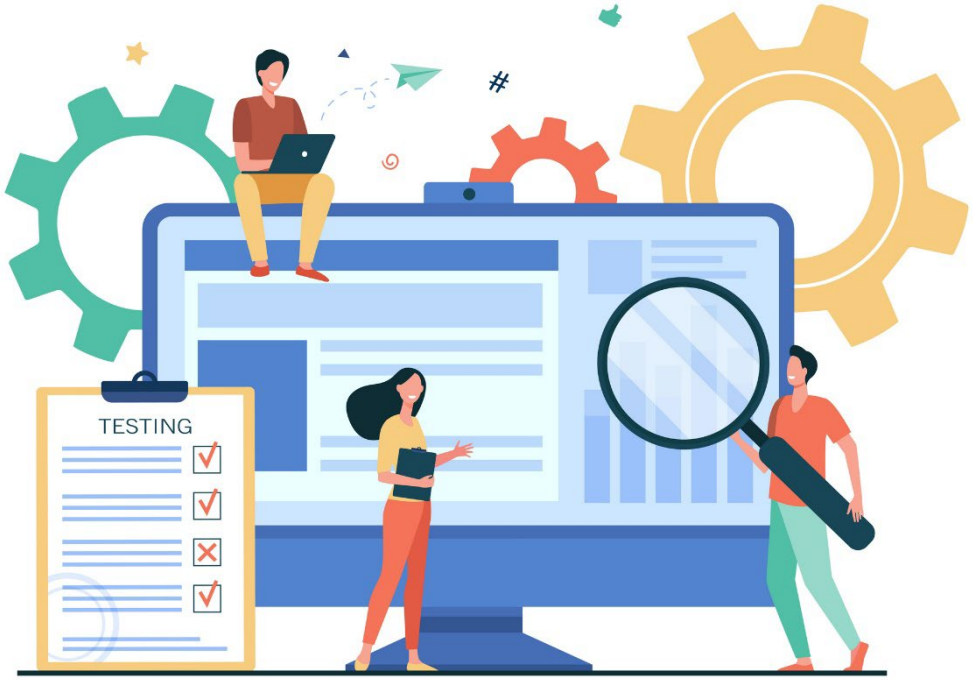
NEOGOV

HR Liaison User Guide

► Revised 12/2/2024



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Overview

As an HR Liaison, you play a critical role in the recruiting process. Here is a look at the recruitment process from end to end:

Your role in the recruitment process consists of these general steps:

1. You draft the Job Ad that will be added to NEOGOV and posted online by the OHR Recruiter.

   Note: You need to first complete the Job Ad Template in Word and have it on hand as you create the job requisition (REQ). Please **do not add special characters to the template text** (such as non-breaking spaces). You will also need to load the document online and create an editable link to the job ad to share with the Hiring Manager and Recruiter.

2. You then create the REQ in NEOGOV, including setting up approval workflows. Once done, the system automatically sends the REQ and job ad for review and completion in this order:

   1. *OHR Compensation* - to add the anticipated salary range
   2. *Hiring Manager* - to review the job ad and REQ
   3. *Your OHR Recruiter or Delegation of Authority (DOA) Recruiter* - to review the REQ and job ad, prepare the REQ, and post the job ad

   After the job closes, interviews are conducted, interviewees are rated, and the Hiring Manager selects the candidate to whom they wish to extend a conditional offer (called the e-Offer).

3. You review and approve the Hiring Manager's request to extend a conditional offer.

   Once you review/approve the conditional offer, the request is then sent to the OHR Recruiter for final steps.

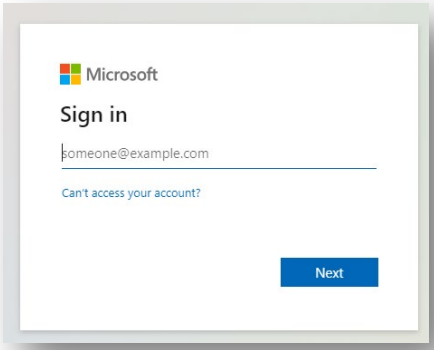
Acronyms Used in This Guide

- DOA Recruiter: Department HR Liaison with Delegation of Authority from OHR to post jobs, create eligible lists, and/or give conditional/final offers.
- PD: Position Description
- PDM System: Position Description Management System
- PN: Position Number
- Referred List/Eligible List: List of eligible candidates created by the Recruiter
- REQ: Shorthand for job requisition

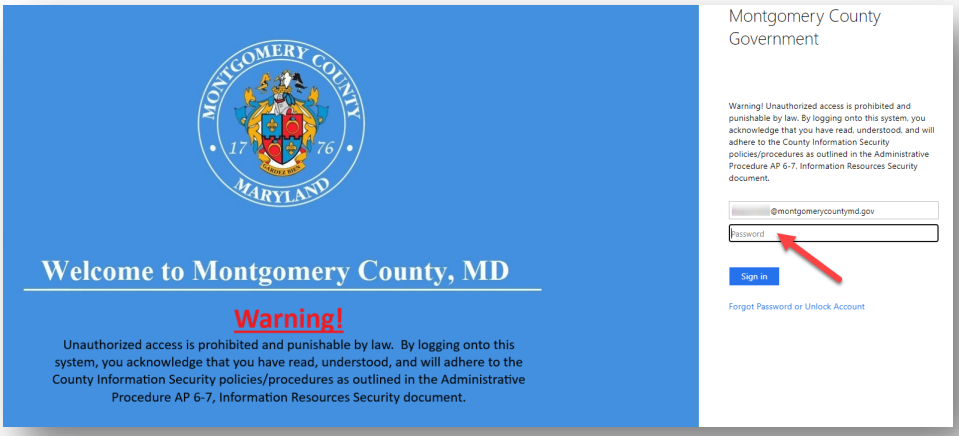
Access the System

- Go to https://login.neogov.com/authentication/saml/login/montgomerycountymd. This URL provides direct access to the system without having to use your VPN.

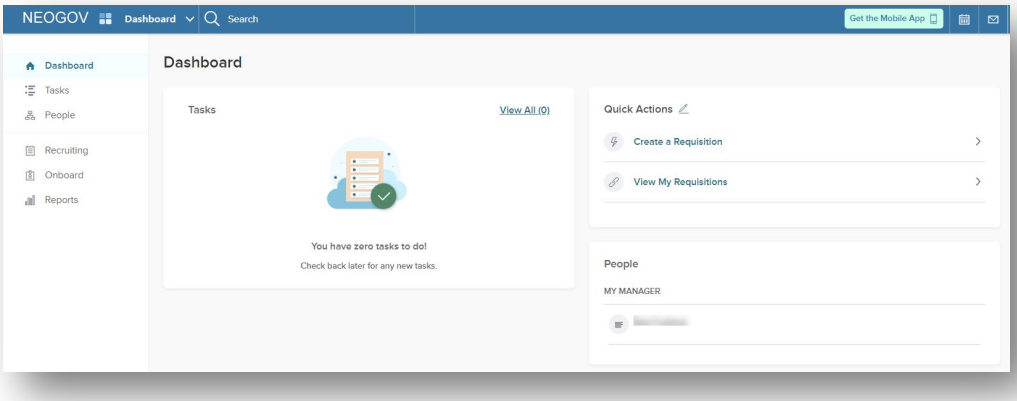
- If you are not already signed on to AccessMCG, you will need to enter your AccessMCG user name plus @montgomerycountymd.gov (username@montgomerycountymd.gov), then click Next.



- The following screen will appear; enter your AccessMCG password.



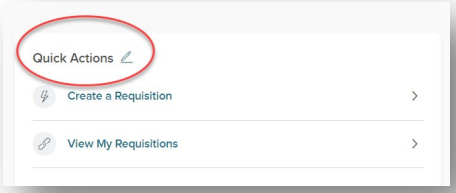
- Once logged in, you will see the NEOGOV Dashboard.



Important System Tips

- **Magnifying Glass:** Whenever you see a magnifying glass at the end of the field, this means you can click it and search for pre-populated data. Also, in most cases, you will then need to click the Done button (top right of the slide-in windows) before the system accepts your selection.

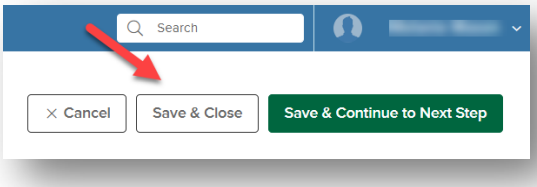
- **Quick Actions:** In addition to the Tasks area of your Dashboard (which will contain REQ-specific actions you need to take), you also have a Quick Actions area (right side of the Dashboard) to do some of the more common tasks in NEOGOV.



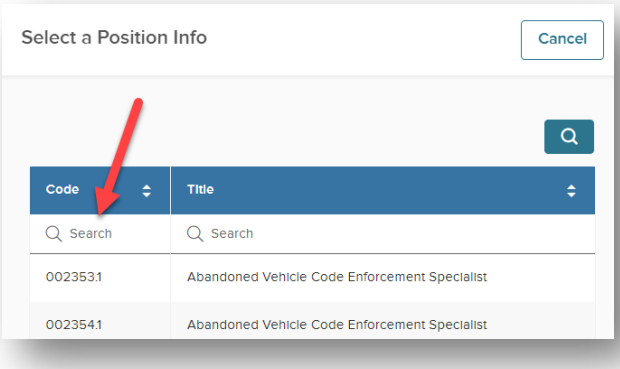
- **Required Fields:** These are marked with red asterisks*.

- **Save and Next Buttons:** In NEOGOV, these buttons are generally found at the far top right of screens. This means you may need to scroll to the top of a screen to continue to the next step.

- **Saving and sign out (to come back at a later time)**: You can always save your work and return later by selecting the Save & Close button (top right of most NEOGOV screens.



- **Search fields (in charts):** These are often found right under the top of a column in a chart:

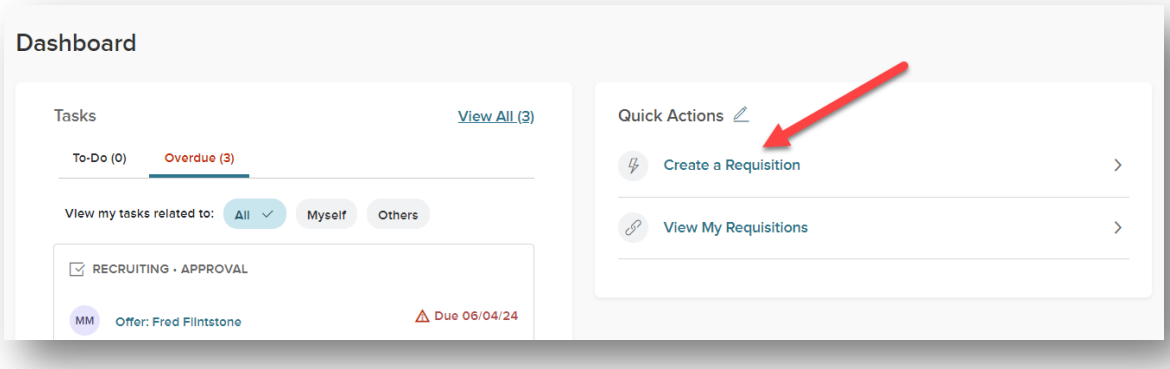


Create the REQ

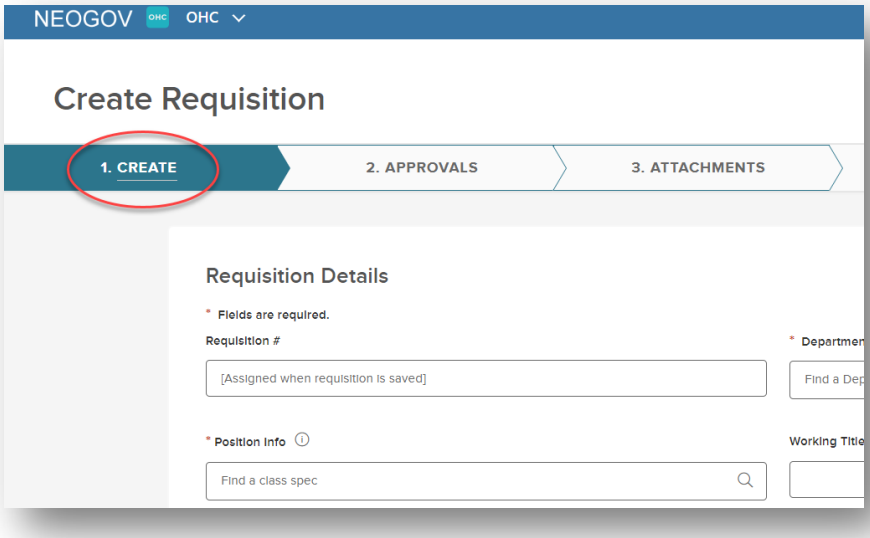
There are three parts to the job requisition (REQ) creation process: 1) creating it, 2) setting up approvals, and 3) attaching any relevant documents. In this section, you will create the REQ.

Important: Before you begin this process, you need to complete the Job Ad Template in Word and have it on hand as you create the job requisition (REQ). Please **do not add special characters to the template text** (such as non-breaking spaces). You will also need to load the document online and create an editable link to the job ad to share with the Hiring Manager and Recruiter.

- Sign on to the system using the steps in the Access the System section of this guide.
- In the Quick Actions section, click the Create a Requisition link.



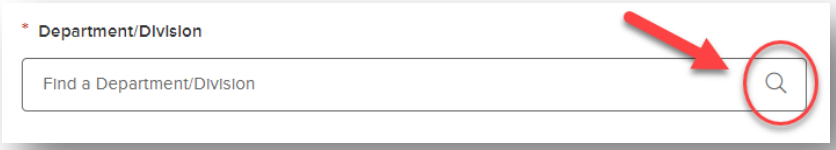
- The Create Requisition screen will appear with the Create tab highlighted. This is where you will add relevant information about the position you want to advertise.



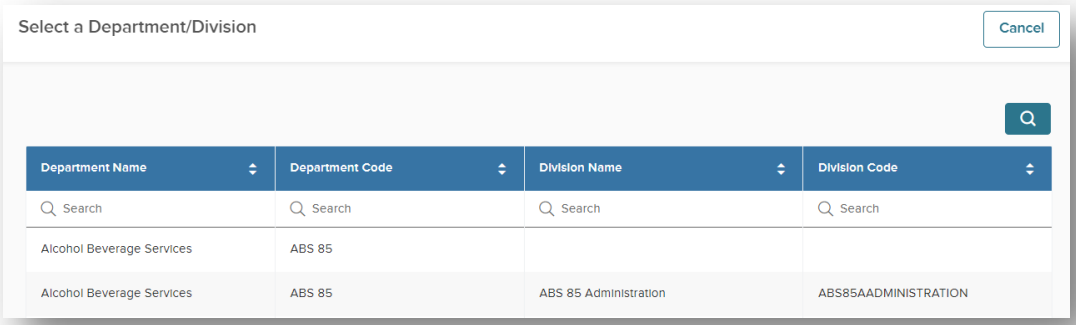
Follow these steps for each field:

- *Requisition #:* Skip this field; this information will be auto-assigned once your requisition is submitted or saved. No action is needed.

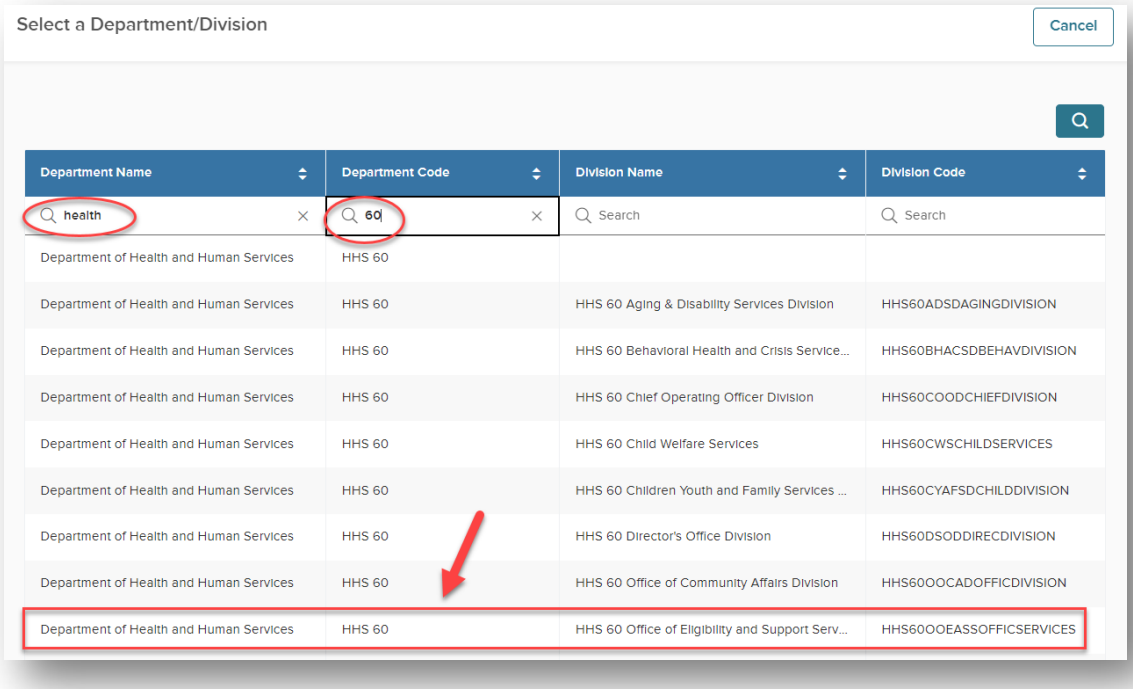
- *Department Division:* Click the magnifying glass at the end of the field to search for the department/division where this position resides.



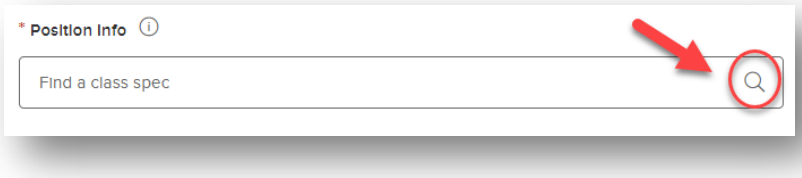
The Select a Department/Division slide-in window appears.



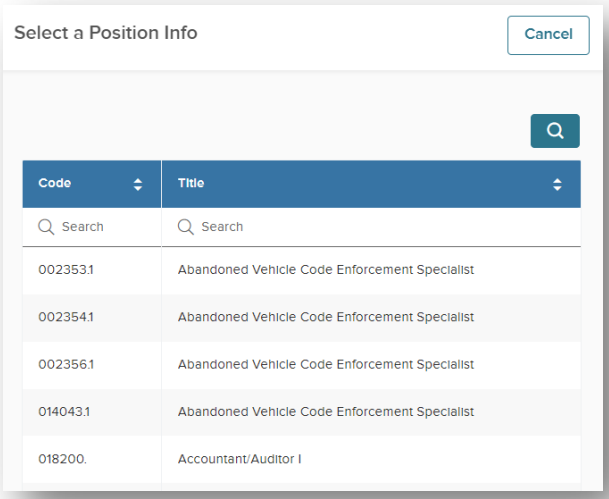
To find and select the Department/Division, enter any keyword from the department name and other pieces of information to narrow the selection. Once the desired department/division appears (for example, HHS 60 Office of Eligibility and Support Services), select the full Department/Division name.



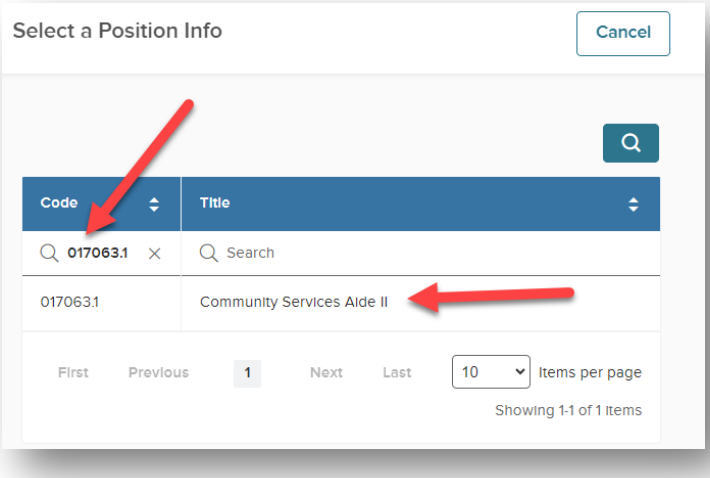
- *Position Info:* This is the job class title. Click the magnifying glass to the far right of the field.



The Select a Position Info slide-in window appears.



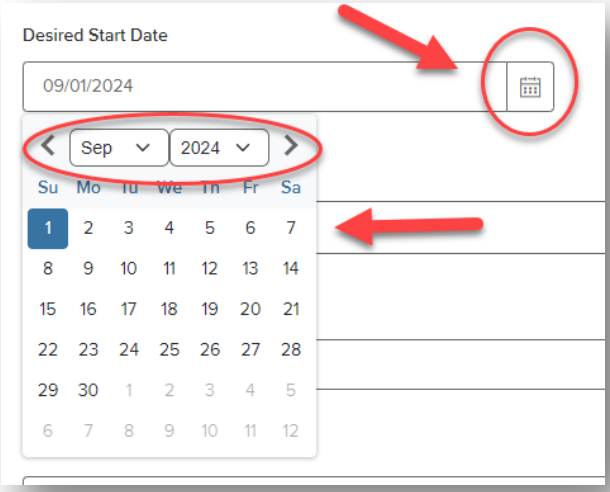
Enter the Position Number (PN) in the Search box at the top of the Code column (for example, 017063.1) and select it. You can locate the PN in the Position Dashboard of the BI Enterprise Reporting Tool. Then, select the correct title that pops up.



- *Working Title:* This is the job title and grade that will be advertised on the job board. It must always be completed regardless of whether the job's actual title and working title are the same or different. The format should be **Working Title (Position or Class Title, Grade).**

  Example: The actual position title is Legislative Analyst but you would like the job board to display Policy Analyst. In the *Working Title* field, enter **Policy Analyst (Legislative Analyst, Grade N28)**.

- *Desired Start Date:* Click on the calendar icon at the end of the field and select an estimated date for the new hire to start their position. This is typically approximately 12 weeks from when you plan to submit the REQ and job ad to the Hiring Manager. This will provide sufficient time for all steps in the recruitment process. Ensure the date begins at the start of a pay period (Sunday).



- *Hiring Manager:* Click the magnifying glass icon and, in the Select Hiring Manager slide-in window, enter the Hiring Manager's name in the Search field under the Full Name column header. (The Hiring Manager is the individual who will be handling the hiring tasks of this REQ such as approving the REQ and job ad, reviewing referred candidates, setting up and selecting candidates to interview, etc.). Click the checkbox to the left of the person's name and then click the Done button (top right of window).

- *Interview Panel Lead:* Follow the same steps as for the Hiring Manager selection. The Panel Lead will be the person to enter the consensus ratings into NEOGOV after the interviews have been completed.

- *Interview Panel Member:* Follow the same steps as for the Hiring Manager selection. The names listed here will have access to review the Eligible List, in addition to the Hiring Manager, Interview Panel Lead, and HR Liaison.

- *Job Type:* Select the one that applies to your position (for example, Permanent).

- *List Type:* Select who can apply for the job:

  - For jobs that should be open only to MCG employees, select Promotional Only.
  - For jobs that should also be open to MCG employees and external applicants, select Regular and Promotional.
  - Do **not** select Regular, Departmental Promotional Only, or Transfer.

- *Position:* Click the magnifying glass icon and, in the Select Position slide-in window, search for the PN. Click the box to the left of the PN and then click the Done button (top right of window). If hiring for multiple positions, select each position number in this field.

- *Number of Vacancies:* Set this to equal the number of positions you are entering into the Position field.

- *EEO/Census Data Template:* Leave blank as all MCG positions will use the same fields.

- *Hard to Fill Positions*: If applicable, select a justification.

- *Advertise Remote Employment:* Select the appropriate remote work category for the position.

- *Assignment Category:* Select the one that applies to your position (for example, full-time regular).

- *REQ Status (OHR Use Only):* Do not change this field.

- *Underfill Title:* If applicable, list job class titles for which you are willing to have underfilled. If there are no underfills, leave it blank. For example, if hiring a Community Services Aide II and you are willing to hire at the Community Services Aide I level, enter Community Services Aide I.

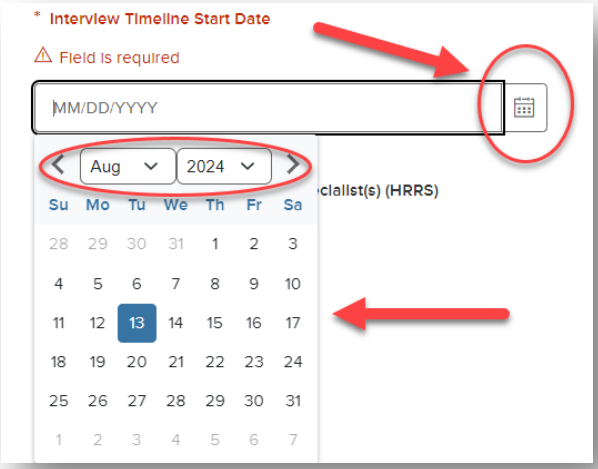
- *Underfill Grade:* If applicable, list grade level(s) of the underfill job class title(s).

- *Multilingual Requirements Level:* If multilingual is required and is documented in Oracle for this PN, select the level required here. Otherwise, leave it blank.

- *Languages Required:* If a particular language is required, select the required language here. Otherwise, leave it blank.

- *Ad Instruction:* Select how long you want to run the job ad and accept applications (typically, two weeks). If you want to run the ad longer than four weeks and be able to receive multiple eligible lists, select Open Continuous. The standard Open Continuous recruitment is advertised for three months, with the first eligible list pulled after two weeks (and the option to pull additional eligible lists upon request thereafter).

- *Interview Timeline Start Date:* Based on the amount of time you selected for the job ad to run (generally two weeks) and also considering the time it takes to create the eligible list (up to two weeks if many candidates apply), enter an approximate interview start date by clicking the calendar icon at the far right of the field, then using the Month/Year and date fields to select your date.



- *Interview Timeline End Date:* Enter an approximate end date using the same method as above. A good rule of thumb is to run interviews for 5 business days. If running two rounds of interviews, you would then conduct them within 10 days.

- *Human Resources Recruitment Specialist(s)*: Select your primary recruitment specialist assigned to your department. If your department has a delegation of authority to hire for this position, select Delegated Authority Recruiter.

- *Job Ad - Live Document:* Copy and paste the editable document link for your completed Job Ad Word document. This will be used for collaborative purposes later on in the approval process for the Hiring Manager and Recruiter to review the job ad.

- *Estimated Salary for Comp Review use only:* Leave this field blank. This will be filled in by the OHR Compensation team to provide an anticipated salary range on the job posting.

- *New Position?*: Select No.

- *Add Position Detail:* Do not click on this link.

- *Comment:* Leave this field blank, unless you have a comment or have a requisition with multiple position numbers. In the latter case, list the position numbers and vacancy status in the comment field and update the list as positions are filled.

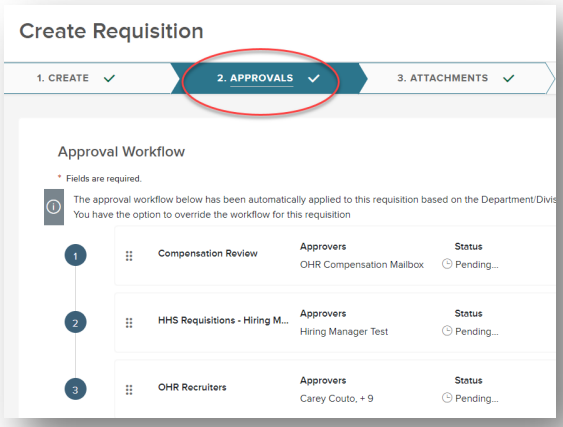
  Example
  003252 - Vacant
  003253 - Vacant
  003256 - John Smith effective 9/23/24
  003257 - Vacant

- Scroll up and click the Save & Continue to Next Step button (top right of screen).

Prepare the Approvals Workflow

As mentioned earlier, there are three parts to the job requisition (REQ) creation process: 1) creating it, 2) preparing the approval workflow, and 3) attaching any relevant documents. In this section, you will prepare the approvals workflow.

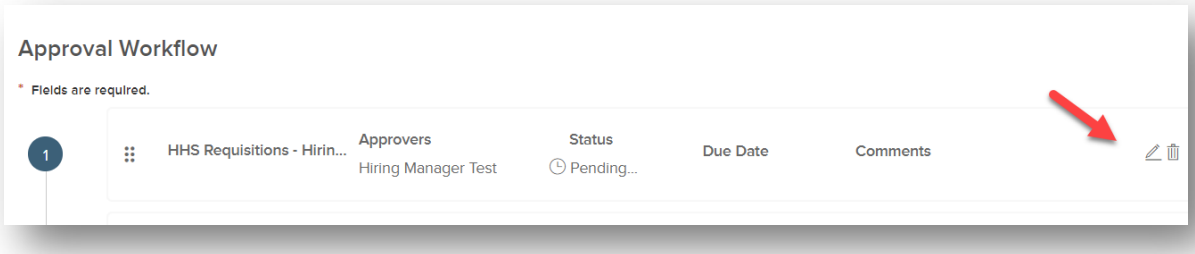
As shown on the next page, you will now be on the Approvals tab of the Create Requisition screen. In general, the flow of REQ approvals works like this: 1) OHR Compensation (to enter the anticipated salary range), 2) Hiring Manager (to approve the REQ and job ad), and 3) OHR Recruiters (to review the REQ and job ad, prepare the REQ, and then post the job ad).



First-Level Approval (Compensation Review)
Do not change any field of this approval level.

Second-Level Approval (Hiring Manager Review)
For most positions, you will see a pre-programmed approval workflow. (If not, go to the end of this section, Add Approval Group, to see how you can create the approval workflow.) You will now select the Hiring Manager who you want to review the REQ.

- Click the pencil (far right of first approval row).



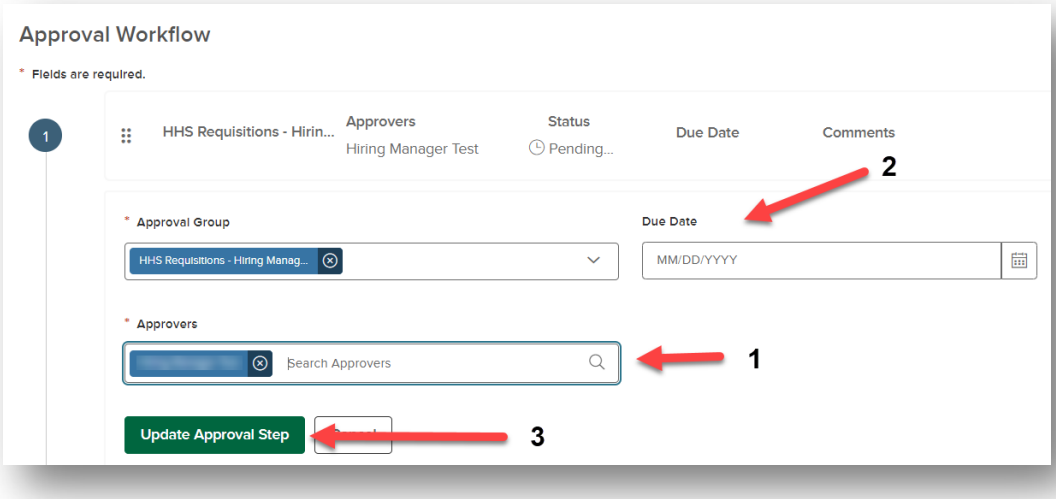
- The information fields for the Hiring Manager approval appear. Follow these steps to add the Hiring Manager approval step for this REQ:

  Note: Do not change the first field, Approval Group.

  1. *Approvers*: Click the magnifying glass icon in the Approvers field; the Select Approvers slide-in window appears. To select the specific Hiring Manager for this REQ, add the person's name to the Search box under the column title, Name, and then click the box to the left of the Hiring Manager's name. (If for some reason they do not appear, please notify your OHR Recruitment Specialist.) Click the Done button (top right of screen). The name will appear in the Approvers field.

  2. *Due Date*: Click the calendar icon to the far right of this field and select the due date for the Hiring Manager to approve your job and REQ (generally, three business days depending on the person's availability).

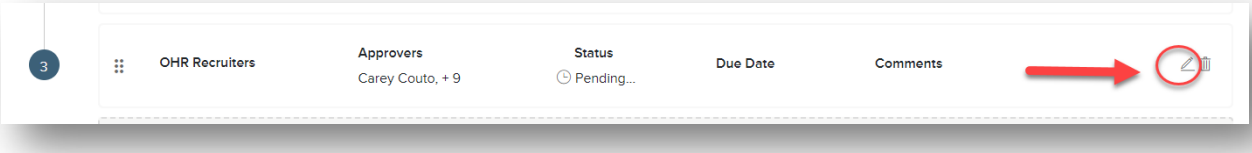
  3. Click the button, Update Approval Step.



Third-Level Approval (OHR Recruiters or Your Department's DOA Recruiter Review)

You will now select the Recruiter who will handle this REQ.

- Click the pencil (far right of third approval row). The information fields for the OHR Recruiters approval appear.



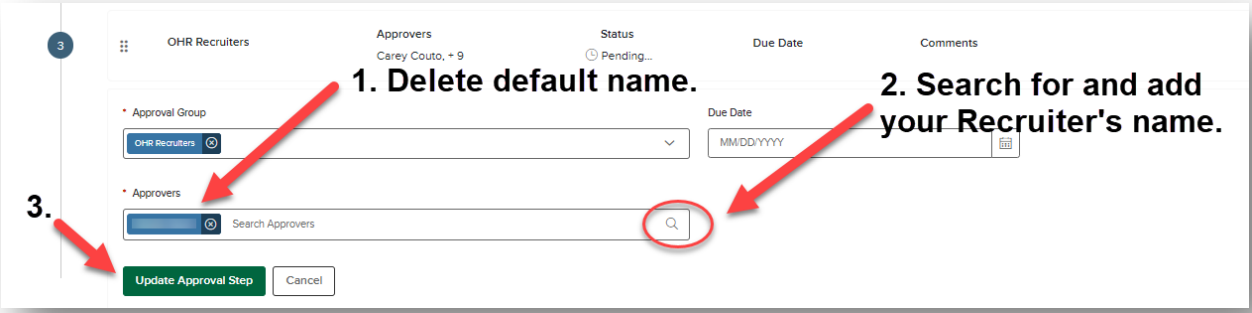
Note: Do not change the Approval Group or the Due Date fields.

- *Approvers*: Select your Recruiter. You will need to change the default person listed (OHR's Recruitment & Selection Manager) as follows.

  1) Delete the OHR Recruitment & Selection Manager's name.

  2) Click the magnifying glass to the far right inside that field and, on the Select Approvers screen, search for/add your Recruiter's name. (If for some reason they do not appear, please notify your OHR Recruitment Specialist.) Then, click the Done button (top right of the Select Approvers screen). The name will appear in the Approvers field.

  3) Back on the Approval Workflow screen, click the Update Approval Step button as shown below.



After You Complete the Approval Workflow

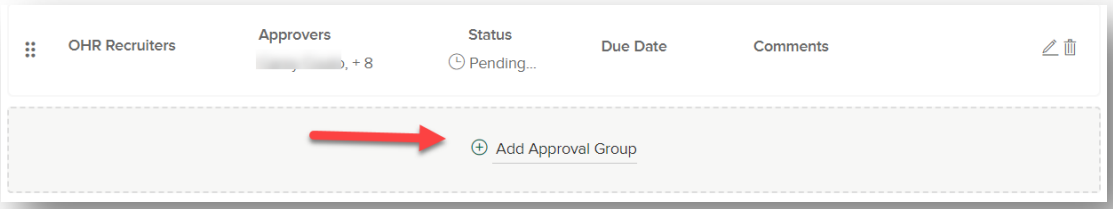
- On the Create Requisition screen (Approvals tab), click the button, Save & Continue to Next Step (top right of screen).

- Go to the Attach Relevant Attachments (If Required) section of this guide (unless you need to add the Approval Workflow Step; in that case, continue to the next step).

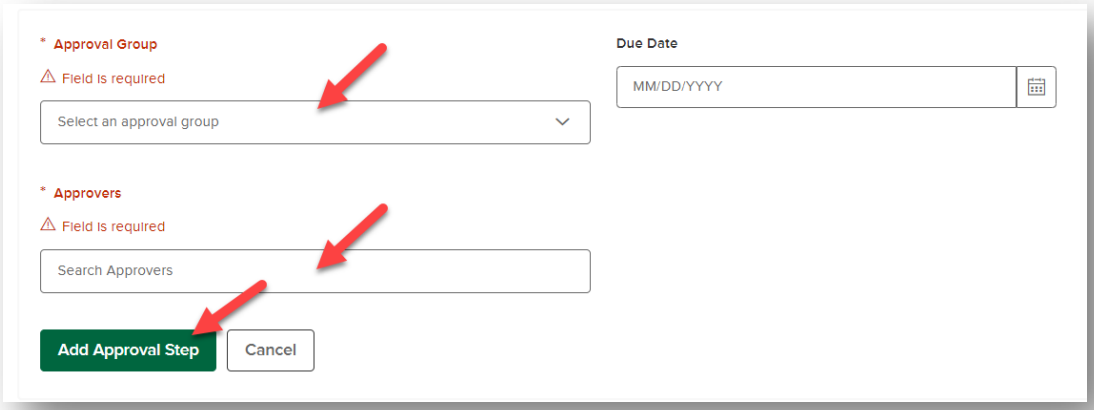
Adding an Approval Workflow Step

If you need to add an approval workflow step based on your department's recruiting process, follow the steps below. Generally, approval workflow steps are pre-populated as shown in the previous steps.

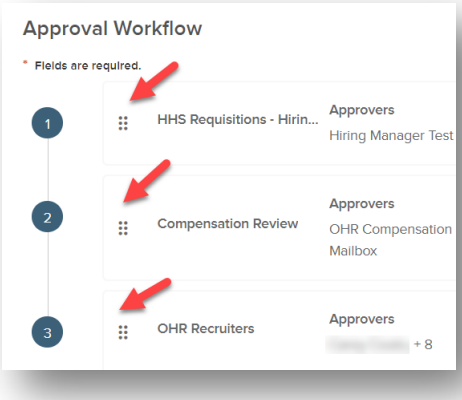
- Click the Add Approval Group link at the bottom of the Approval Workflow chart.



As shown below, 1) click the Approval Group field and select the hiring manager group for your department, and 2) click the magnifying glass that will appear in the Approvers field to select the specific hiring manager for this job requisition. Then, click the button, Add Approval Step.



- **Tip:** To re-order the workflow, click, hold, and drag the buttons shown below (being careful to keep the OHR Compensation step first in the flow, and OHR/DOA Recruiters remain last in the flow):



- You will now see the name added to the workflow and a number to the left of the approver's name.
- On the Edit Requisition screen (Approvals tab), click the button, Save & Continue to Next Step (top right of screen), and then go to the Attach Relevant Documents section of this guide.

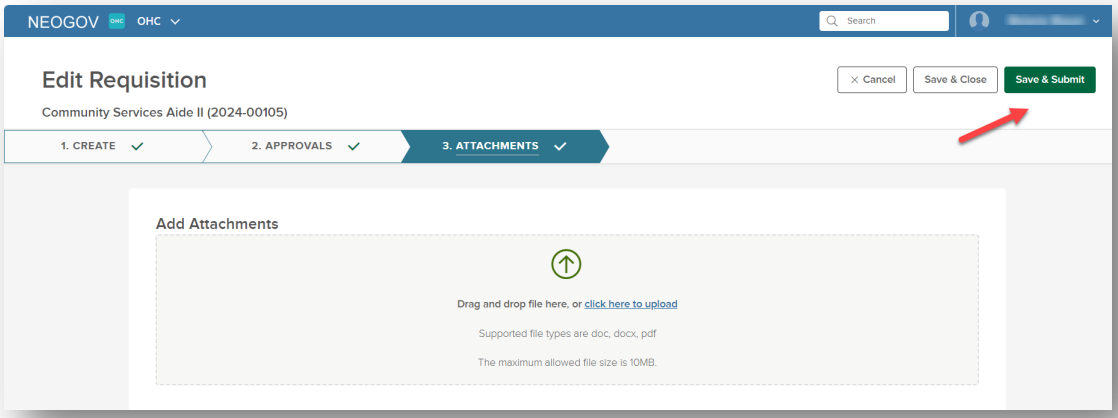
Attach Relevant Documents (If Required)

As mentioned earlier, there are three parts to the job requisition (REQ) creation process: 1) creating it, 2) setting up approvals, and 3) attaching any relevant documents. In this section, you will attach relevant documents (if required).

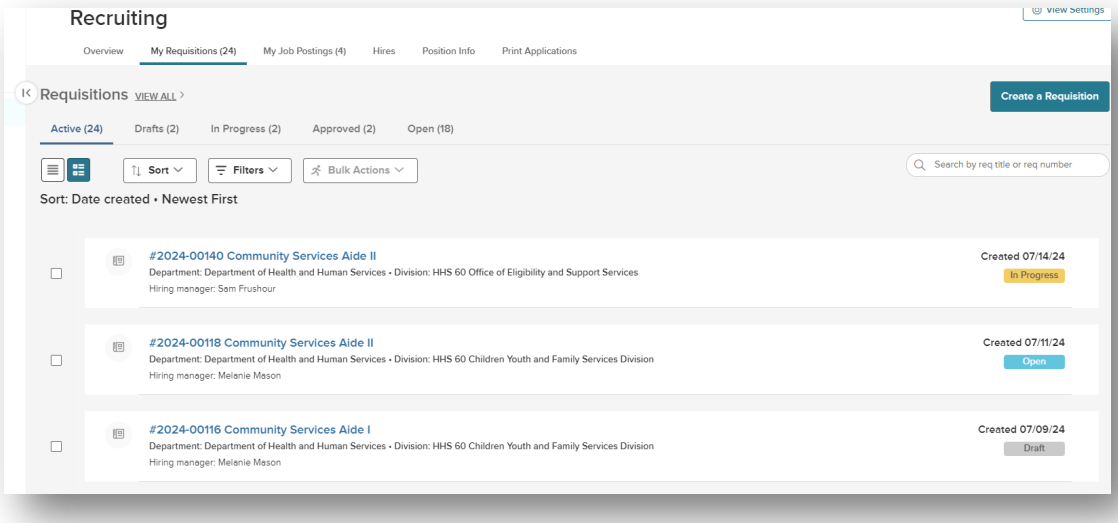
Note: The following step is only required if the job class does not require a position description (PD).

- Upload the class specs or the PD (.pdf file) that has already been approved and finalized by your department through the Position Description Management (PDM) system. To regenerate a PD file, follow the steps in the Regenerate Completed PDs section of the PDM system user guide.

- Click the Save & Submit button (top right of screen).



- You will then see the Recruiting/Requisitions screen.



- You have completed the REQ and the system has sent it to OHR Compensation to add the estimated salary (before the Hiring Manager's review). You will receive a system email titled, **Message From NEOGOV Insight: Requisition Created**. This is your confirmation that the REQ and job ad have been sent to OHR Compensation.

From: info@neogov.com <info@neogov.com>
Sent: Saturday, July 13, 2024 12:31 PM
To: [redacted]@montgomerycountymd.gov>
Subject: Message From NEOGOV Insight: Requisition Created

[EXTERNAL EMAIL]

*** 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 [redacted],
Requisition# 2024 - 00005 has been created on 07/13/24.

Class Title: [redacted]
Working Title: [redacted]
Desired Start Date: [redacted]
Department: [redacted]
Division: [redacted]
Hiring Manager(s):
[redacted]n@montgomerycountymd.gov

To view the details of this requisition, please go to https://login.neogov.com/authentication/saml/login/montgomerycountymd
If you have any questions regarding this recruitment, please contact:

[redacted] (HR Liaison)
[redacted]@montgomerycountymd.gov

- As the REQ progresses in the workflow, you will be notified via automated system emails along the way.

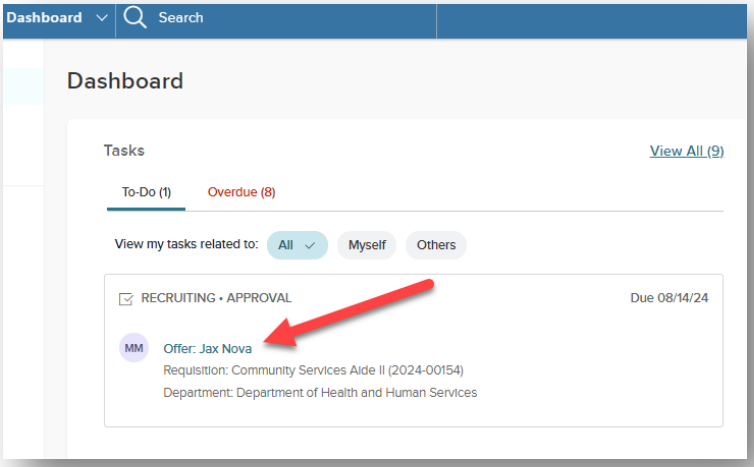
- To sign out of the system, follow the steps in the Sign Out of the System section of this guide.

Approve the Request to Extend a Conditional e-Offer

Once the job has been posted, interviews have been conducted, and the Hiring Manager has reviewed the ratings, the Hiring Manager will request that a conditional e-Offer be made to a specific candidate. At that point, you will receive a system email to review, edit, and approve the offer in the system. It will then be sent to the OHR Recruiter to review and extend the offer.

- Log in using the link in the NEOGOV email (or use the Access the System section of this guide).

- On your NEOGOV Dashboard, click on the link in your Tasks list (called Offer: Candidate Name).

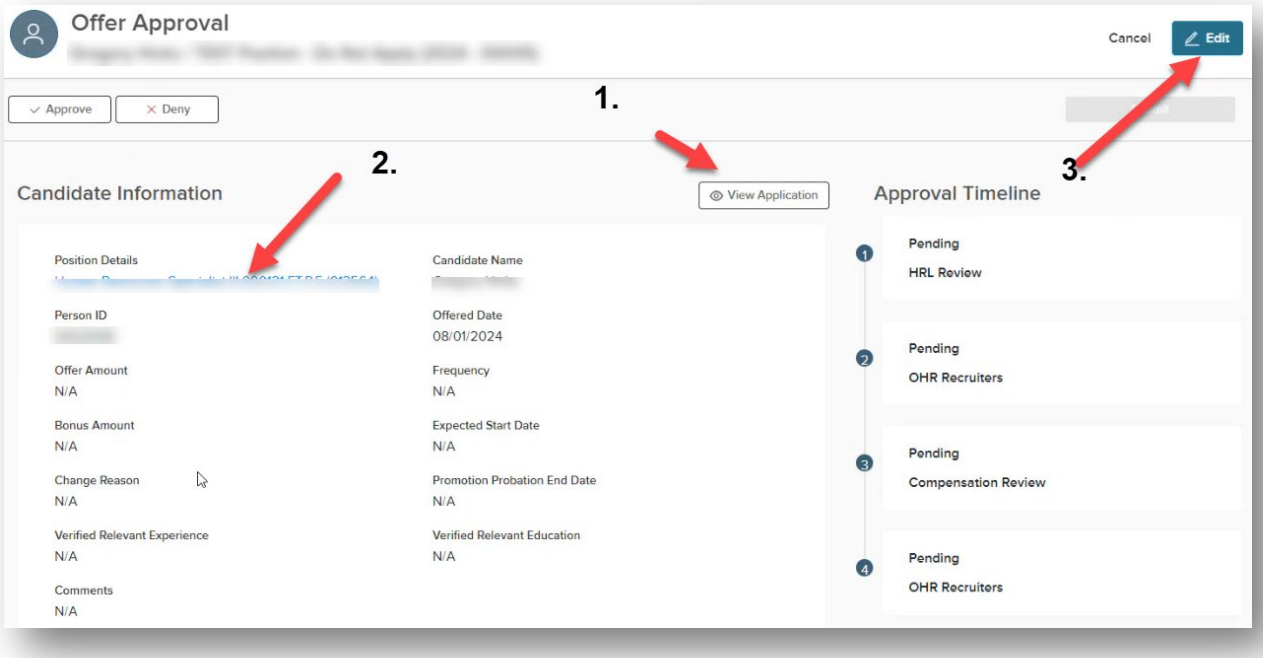


- The Offer Approval slide-in window appears. At this point, you can check the following items on the Offer Information tab:

  1) Click the View Application link to review and determine relevant experience/education years (which you will need to add in an upcoming step).

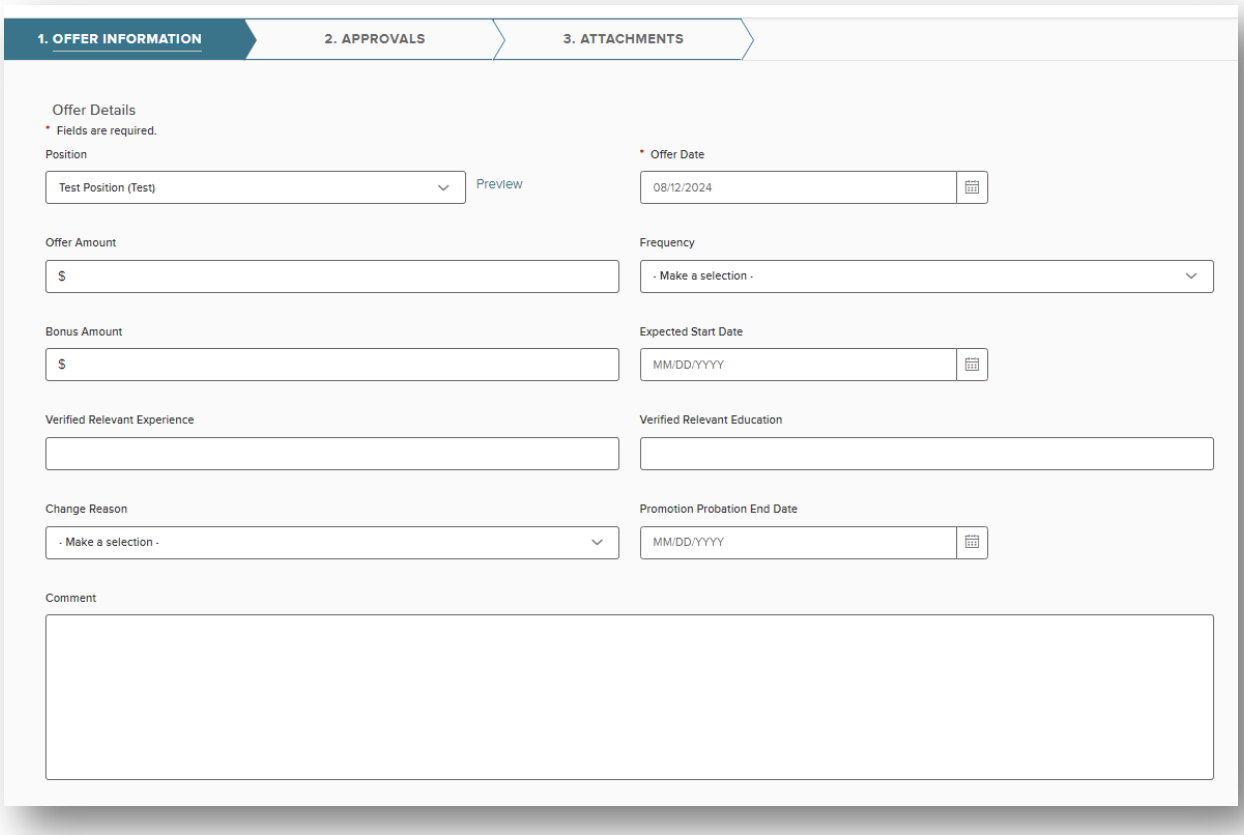
  2) Ensure that the position is still available by clicking the link in the Position Details field. The pop-up window should not have an employee name associated with it in the "Employee Name" field.

  3) Click Edit.



- The Offer Approval slide-in window appears; make the following changes:

    - *Offer Amount:* Add this based on the wage equity analysis.
    - *Frequency:* Set to Annually for annual salaries.
    - *Expected Start Date*: Add the anticipated date for the candidate to start in the position, which should always be the start of a pay period (Sunday).
    - *Verified Relevant Experience*: Enter the number of Verified Relevant Experience years.
    - *Verified Relevant Education*: Enter the number of Verified Relevant Education years.
    - *Change Reason*: Select Appointment (unless the person is being Promoted, Demoted, or Rehired/Reappointed).
    - *Promotion Probation End Date*: Use only if this is an internal candidate.
    - *Comments*: Add any applicable information to the Comments area, such as if the requested salary is above the mid-point or minimum, or if the recruitment is for an underfilled grade.



- Click the Save and Continue to Next Step button (top right of window).

- On the Approvals tab, check to ensure everything looks accurate. For example, if you know your Recruiter is on leave, you will need to Edit the form and select the backup Recruiter. Also, for the HR Liaison review, click the Approval pencil to remove OHR's HR Liaison name from the Approval workflow and replace it with your department's HR Liaison name(s).

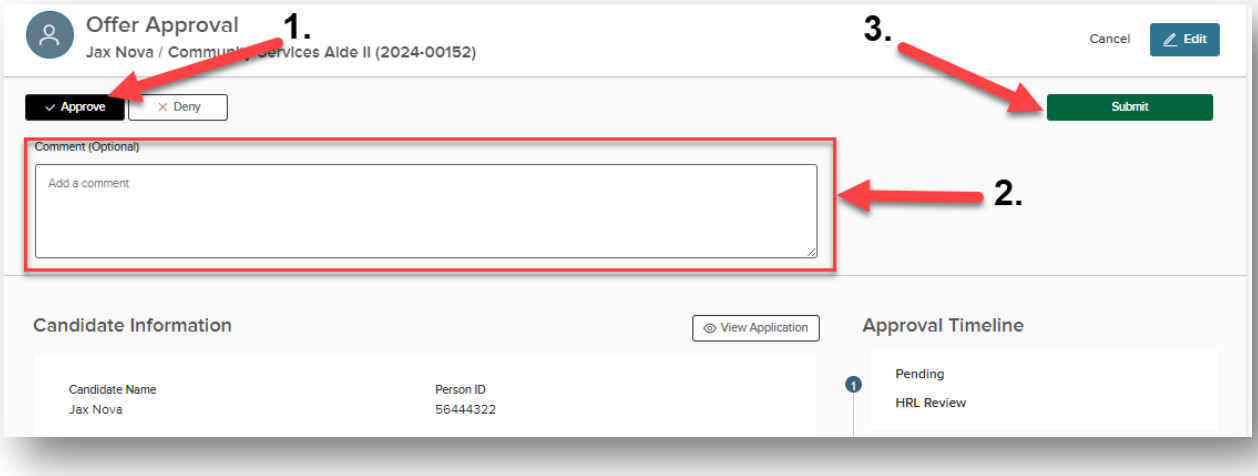
- Click the Save and Continue to Next Step button (top right of the window).

- On the Attachments tab, add the Interview packet (if not already attached). Also, if the requested salary is above the mid-point for an unrepresented position, above the minimum salary for a represented position, or a promotional salary increase greater than 10%, attach the Compensation Request Memo (also called the Decision Memo). If recruiting for a MCGEO position, you should also attach a salary equity review document.

- Click the Save and Submit button (top right of window).

- Back on the Offer Approval window, review the information for accuracy and ensure all attachments appear.

- Select Approve and enter any relevant comments (optional). (You also have the option of denying the offer. If needed, the offer record can be sent back to the Hiring Manager, and the process restarted at that point.) Click the Submit button.

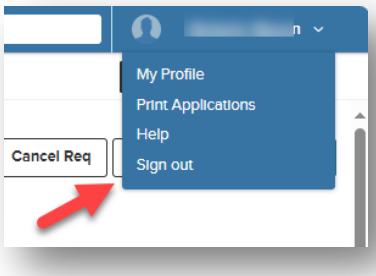


- The e-Offer request has now been sent to the Recruiter. On your NEOGOV Dashboard, the task no longer appears on your Tasks list.

- To sign out of the system, follow the steps in the Sign Out of the System section of this guide.

Sign Out of the System

- To log out of the system, hover over your name (top right of screen).
- Select Sign Out from the drop-down menu.



Resources

System Issues

- If you need help accessing the system or experience a technical issue, submit a helpdesk ticket to HelpIT@montgomerycountymd.gov.

Recruiting Process Questions

- Visit the HR Liaison SharePoint site and reach out to a fellow HR Liaison: Peer Consulting
- Contact your assigned OHR Recruitment Specialist.

This document provides general information about Montgomery County Government's recruiting process. If there is an inconsistency between the content of this document and any other documents, the applicable document will prevail (e.g., the law, regulation, procedure, or collective bargaining agreement). Please consult appropriate references, such as the Montgomery County Personnel Regulations and collective bargaining agreements for additional information.