Basic navigation of NeoEd is covered in the D2L module about Faculty/AP hiring. This guide assumes you are familiar with your requisitions, the “tabs” of Requisition Information, Hire Workflow, Candidates, etc. and have the correct system access.

We continue to refine the forms, fields, and functionality of Neoed. Thanks for your patience as we make this product work for SIU’s needs.

Hiring Manager Tasks: Setting up the committee for Application Review

You can do this immediately after the Requisition is approved, no need to wait!

- In the Requisition, click the “Hire Workflow” tab.
- Click “customize workflow” and then “edit” (pencil icon) the Application Review step.
- In the Edit function:
    - Populate the Hiring Team. Should be a simple button click that imports names from the Req.
    - Display Status to Candidate As: This is what shows to the applicant. You can customize this per Job, but exercise caution. “Application Under Review” is a good option, or just leave blank.
    - Rating Scale: Default is 5 star scale, where 3 is passing. Can be customized with on-screen options. Ratings below 3 stars would not be eligible for interview.
    - Rating Criteria: On/Off toggle button. Off by default. If activated, this allows the committee to give separate ratings based on specific criteria, e.g. Education, Publications, Grant Funding. You can leave this “off” and use a single holistic rating if the committee prefers. If used:
        - Name the criteria (e.g. Education)
        - Describe what the Committee Members should be looking for (adding the relevant minimum qualification language here is a great start)
        - Click “add rating criteria”

HM will get an email when an application has arrived.

- Move applicants from Referred to Application Review status. You can do this as they come in, or wait until the deadline has passed and move them all at once. **The committee will not be able to see the applications until you move them into the Application Review status AND have added the committee members to the workflow.**

Committee Tasks: Reviewing Applications

Committees will carry out these steps themselves, but may need help or guidance along the way. They do not have required training like Hiring Managers have, so they are navigating blindly at first. Help them out!

- When the HM has moved applicants into an Application Review status, the committee members (CMs) should get an email telling them they have applicants to review. They will also see this as a Task on their Neoed dashboard.
- The dashboard will have a link in the Task widget that will take them directly to those applicants.

- Once there, the CM will see a list of names and 3 columns: Total, Unreviewed, and Reviewed applications. This will help them keep track of who they have or have not reviewed, which is especially helpful if they are reviewing applications as they arrive (rather than in bulk after the deadline).
- The CM will click on any name to start, which will show them the applicant's information, responses to questions, and attachments. The CM should review each of these attachments and compare them to the minimum and preferred qualifications as published.
- The CM should assign a rating to each applicant.
    - Default is a 5 star scale, where 3 is passing. The HM may have changed this to another format; if so, consult with the HM or Hiring Administrator on what is needed.
    - The CM can also add comments in a text box, which are visible to other CMs, the HM, and Affirmative Action. These comments are retained as part of the applicant's record on this Requisition.
    - The CM can see the ratings of other CMs.
    - The ratings of each CM are averaged for the applicant, giving a final overall rating. If using the default setup, ratings below 3 stars would not be eligible for interview.

Hiring Manager Tasks: Interview Requested Status

Once the committee has reviewed all applications and decided on their finalists, the HM will update the candidates for appropriate approvals. This is an "interview request" in Neoed.

- Navigate to the Hire Workflow tab, and click "customize workflow". Edit the "Interview Requested" step. Using the search box (magnifying glass icon), add Ashley Followell and Arianne Smith. Save and close. This is how we are notified that we have candidates to review. **You can also do this customization at the same time you add the hiring committee in the previous step.**
- Navigate to the Requisition and click the "Candidates" tab.
- Update the Status of each applicant, based on the committee's review and notes. Work with the Committee Chair or Hiring Administrator as needed.
    - The Non-Finalists: Move applicants in this group to the "rejected" status and assign an Inactivation Reason (formerly disposition code). This could be permanent or temporary, depending on the needs of the search. It does not automatically send a rejection email to the candidates.
    - Finalists: Move these applicants from Application Review to Interview Requested.
- Once we have completed our review, we will move the finalists into the Interview status of the workflow. That is the "approval" of your request. **Do not move applications into the Interview status yourself.**

Hiring Manager Tasks: Interview Scheduling

While the HM and committee are awaiting interview approval, you can go ahead and populate the Interview timeslots and setup the self-scheduling interface. This will be more efficient for scheduling the interviews once they are approved. The HM could also do parts of this well in advance in order to save time later.

- Click "customize workflow"

- Click “edit” on the Interview step.
- Step Details (Step 1):
  - Display Status to Candidate As: This is what shows to the applicant. You can customize this per Job, but exercise caution. “Application Under Review” is a good option.
  - Click “Populate Hiring Team”. Should be a simple button click that imports the search committee from the Req.
  - Rating Scale: Default is 5 star scale, 3 is passing. Same options as the Application Review step.
  - Rating Criteria: On/Off toggle button. Off by default. Same options as the Application Review step.
- Scheduling (Step 2):
  - Pre-configure Interview Slots is “off” by default.
  - Allow Candidate Self-scheduling is also “off” by default. You have to enable Pre-configured time slots to access this feature.
  - If you do not want to use self-scheduling or pre-configured interview slots, save and close this screen and skip the next bullet point.
  - If you want to **pre-configure your interview schedule:**
    - Select locations. Search the list to see if your building or department has been added already. If not, let us know! We’ll help. There is an “online/remote meeting” location for virtual interviews.
    - Select Available Dates. Click the dates on the calendar you want to have interviews on.
    - Select times. This area lets you choose the start and stop time for the whole interview block, the duration of individual interviews, and any buffer time between slots.
    - Self-schedule deadline: This is the response deadline the candidate has to schedule their interview.
    - Add Breaks: If you want to build in a lunch break or some down time in the interview schedule, do that here.
    - Rater email confirmation: This is “on” by default. This will send a notification to the search committee members with interview information (interviewee, date, time, location) when an interview is scheduled.
    - Once the applicant has self-scheduled, they will appear in the workflow as “scheduled” and it will display the date and time of their interview. The committee would then carry out the interviews.
- **If you manually schedule interviews, you still need to reflect the actual time/date/location in the system**. This is an important part of recordkeeping and audit protection for SIU and your unit. You can do this step after Affirmative Action moves the candidate into “interview status”.
  - The applicant will appear as “unscheduled” in the Candidates tab. Click that word to open an Interview Details flyout.
  - They flyout will prompt you to note the interview details. Date, location, time, and interviewers are included. A schedule appears below that should show conflicts in scheduling with other finalists (we’re still testing this part). **This is a record only, and does not automatically send an email notice to the candidate.** Once you save, the

candidate will be in a “scheduled” status and will show the interview date and time in the workflow list. This is important for recordkeeping!
    - You can send the candidate an email confirmation of their interview schedule. To do this:
        - click the checkbox next to their name in the workflow, and click the “actions” dropdown.
        - Choose “send notices”. This will open a flyout with a search box.
        - Click the magnifying glass to open another flyout with a list of notice templates. For now, “oral interview confirmation notice” is your best option.
        - When you click that, it will return you to the first flyout. Review the language and merge fields in the email. You may be able to customize the email by clicking the “override” button (if you have it, depends on security access).
        - When you are happy with it, click “send” in the upper right corner. Your interviewee has been notified!

Hiring Manager Tasks: Post-Interview Updates and Candidate Offers

After the interviews are done, the committee should give information to the HM about which candidate(s) they want to hire, and why the others will be rejected. The HM should then update Neoed.

- Navigate to the Candidate tab of your requisition. View the applicants that are in Interview status.
- Move the interviewees who are not being hired at this time to the “rejected” status and assign an Inactivation Reason (formerly disposition code). This could be permanent or temporary, depending on the needs of the search. It does not automatically send a rejection email to the candidates.
- Move the intended hire into Offered status. This will open the Offer Approval Form. The Offer Approval is a combination of the old Hiring Proposal and NOA forms, and is the same for Faculty, AP, and Civil Service employment. Some fields are required, and some fields are situational or optional. Most of them function the same way they did on their legacy forms, and I’ve summarized the most common/important fields below. Note this form is still under revision and finalization by HR. If you have questions, please contact your Dean/VC office or Affirmative Action.
    - Offer Information (Page 1):
        - Offer date: The date you’re *making* the offer, usually today. This is not the start date!
        - Offer amount and Frequency: Generally a monthly salary offer, but annual or other amounts can be entered.
        - Expected start date: Please give enough lead time for approvals, acceptance, and onboarding. Preference is for the first day of a pay period when possible.
        - Acceptance Deadline: When the candidate must return their decision to the hiring unit. This will be shown on the email the candidate receives. Give enough time for routing and approvals. HR/Affirmative Action may reach out if we think it needs adjusted.
        - Justification for hiring outside the goal: Only when applicable. If you are not sure of your position’s hiring goal, contact Affirmative Action.

        - Other terms and conditions of employment: You can use this field for a variety of things! Specific course numbers to be taught, workload percentages, background check clearance contingency…
        - Fields with "Partial Semester Payment Only" notes: For specific Faculty hiring situations. If you are not sure, contact PVCHiring@siu.edu.
        - Intent to reappoint for subsequent semesters: This field helps HR determine benefits eligibility for certain faculty hires. It is not binding to the unit or the employee, and it doesn't guarantee future employment. The new employee would not see this field.

Hiring Manager Tasks: Send e-Offer

This is the final step of employment that is available in Neoed at this time. Additional functionality is still in progress that will handle the new employee onboarding process. Stay tuned!

After the Offer Approval is complete, you need to contact the applicant with the terms of the offer. In Neoed, this is called an "e-offer". It allows the unit one final check over the approved terms of the offer, and invites the applicant to accept the offer of employment.

- Navigate to the Candidate tab, view Offered candidates, and click "send e-offer".
- Offer information screen: This shows you the final version of what was approved in the Offer Approval form. Double check it for accuracy, and contact your approval chain if there are mistakes or concerns.
- If the Offer Details are correct, click Send e-Offer in the upper right corner. This will refresh the screen into a 3 step form.
- Step 1: Offer Detail
    - **NOTE:** This fields in this step pre-populate based on the Offer Approval form, and gives the ability to make changes to those values. **Do not change any information on this page without approval from your Vice Chancellor and Affirmative Action.** Simply click "next" at the top of the page.
    - The Due Date field may not pre-populate (still in testing). Treat this like the Acceptance Deadline field, and enter a reasonable date
- Step 2: Offer Letter
    - This step creates the offer that the applicant will see in their Neoed applicant account. We are developing Offer Letter templates that will meet the needs of various hiring units, but for now please click the "Offer Letter (not SS)" template.
    - Once you click the template, the text of the offer and applicable merge fields will appear. To see how it will appear to the applicant (with the merge fields populated), click the "Sample Candidate" box in the upper center of the screen.
    - Depending on your access levels, you may have an "Override" button in the upper right corner. If you do, this allows you to make adjustments to the language in the letter.
    - If you don't have Override ability but need to make changes to the text, contact Human Resources.
- Step 3: Email Notice
    - This step chooses the email the applicant will receive from Neoed to tell them they are being offered employment. It includes instructions for them to log into Neoed and

accept or decline the offer. In the list of Email Notice Templates on the left, choose "E-Offer Email".

- Like in Step 2, the text of the email and applicable merge fields will appear. Guidance is the same as in the previous step.
- When you are satisfied with the language, click "send e-offer" in the upper right. Your candidate has been notified of their job offer!

If you have any questions about these steps, contact Affirmative Action at affact@siu.edu.