Exam Plan Overview

Introduction

The Exam Plan serves as an electronic file folder. It stores all relevant information on the open position, including the job posting and recruiting plan. This job aid shows how to create an Exam Plan. It also provides an overview of all sections of the Exam Plan and how to use them to their full advantage. Exam Plans are normally created from an open requisition. However, you may create an exam plan without a requisition.

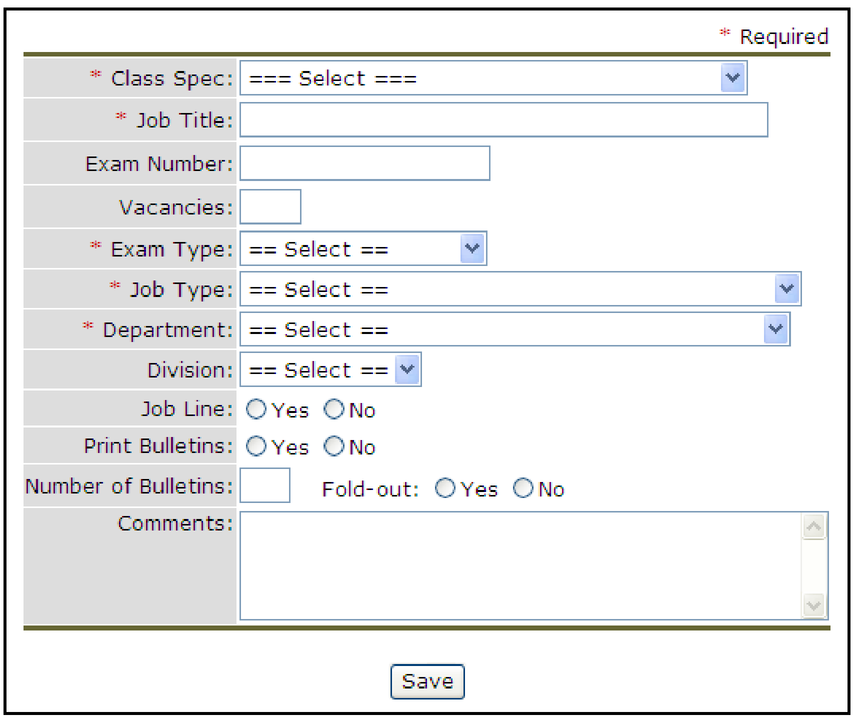
Step	Action	Comments
1.	Log into Insight – Human Resources	
2.	Find your requisition under the “Open Requisitions” section of your My HR page.	
3.	Click “Create Exam”	If you are creating an Exam Plan without using a Requisition, you will go to CandidateTrack – Exam Plan – Create New Exam Plan

Open Requisitions
1 record found.
Page 1 of 1

Req #	Req. Title	Position ID	Department	Rcvd.	Exam	# Ref.	Action
10000	Administrative Assistant 3		Taxation	12/11/08	Create Exam	0	Authorize Edit

4.	Edit the “Class Spec”, “Job Title”, “Exam Number” and “Vacancies” fields as necessary	▪ These fields carry over from the requisition, but can be edited if mistakes were made ▪ The “Exam Number” automatically populates as the “Requisition #” o We recommend not editing this field unless you are associating multiple requisitions with the same exam plan

Step	Action	Comments
5.	Select the “Exam Type” and the “Job Type”	▪ These fields do not carry over from the requisition ▪ You will choose “Open”, “Open and Promotional” or “Promotional” for the “Exam Type” ▪ “Division” is not an available field.* ▪ The State of Ohio does not use “Job Line”. ▪ Agencies who print bulletins for outlying areas may want to use “Print Bulletins” and “Number of Bulletins” for automation and tracking of the process.
6.	Enter any relevant “Comments” and click the “Save” button	



7.	**Job Posting**	▪ Once created, job posting will appear in this section o See “Creating a Posting” Job Aids

Job Posting Add New

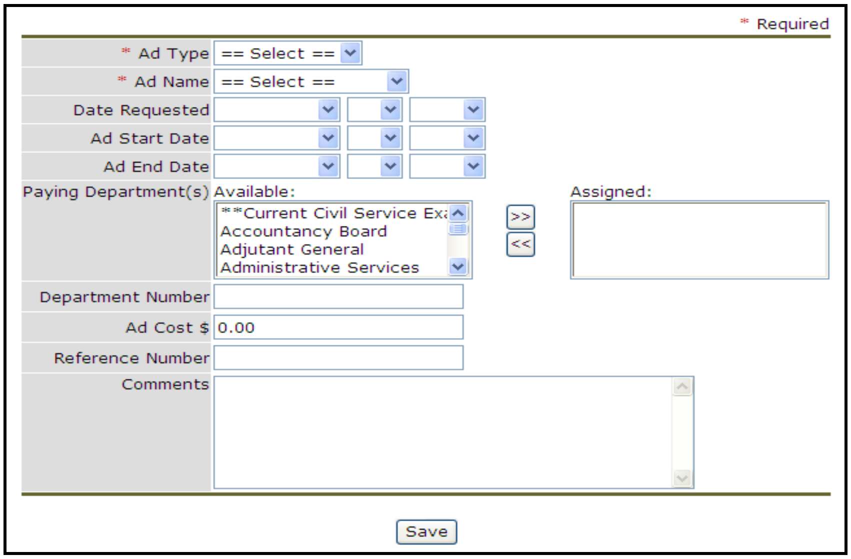
Job #	Job Title	Status	Last Updated	Assigned To

8.	**Recruiting Plan** – Click "Add New"	This allows you to add advertising information.

Recruiting Plan Add New

Ad Type	Ad Name	Requested Date	Start Date	End Date	Action

Step	Action	Comments
9.	Select "Ad Type" and "Ad Name"	These are required fields.
10.	Enter the "Date Requested" and the "Ad Start Date" and "Ad End Date"	These fields are not required and are used for reporting purposes.
11.	Select your agency as the "Paying Department"	
12.	Enter the "Department Number", "Ad Cost", "Reference Number" and any "Comments"	These are also just used for reporting purposes and are not required
13.	Click "Save"	

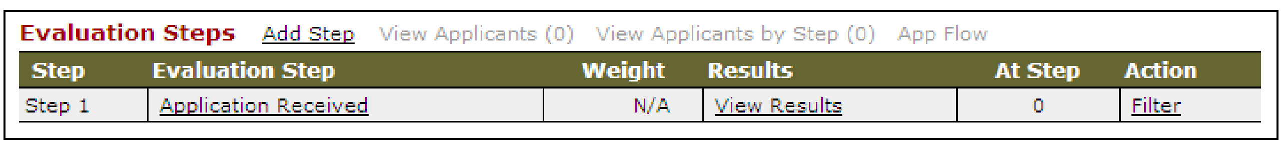


* Required

* Ad Type	== Select ==
* Ad Name	== Select ==
Date Requested	
Ad Start Date	
Ad End Date	
Paying Department(s)	Available: **Current Civil Service Ex; Accountancy Board; Adjutant General; Administrative Services — >> << — Assigned:
Department Number	
Ad Cost $	0.00
Reference Number	
Comments	

Save

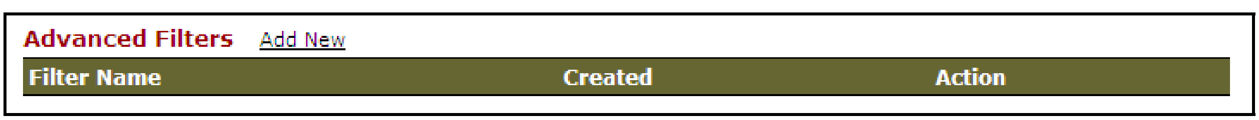
Step	Action	Comments
14.	**Evaluation Steps**	See " Creating Evaluation Steps" Job Aid



Evaluation Steps Add Step View Applicants (0) View Applicants by Step (0) App Flow

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	0	Filter

15.	**Advanced Filters**	See "Advanced Filters" Job Aid



Advanced Filters Add New

Filter Name	Created	Action

16.	**Eligible Lists**	See "Eligible Lists" Job Aid

Eligible Lists Add New Show Archived Eligible Lists

List Name	List Type	Expiration Date	# On List Total	# On List Active	Action
Default List	Normal	N/A	0	0	Edit Archive View Candidates

Step	Action	Comments
17.	**Requisitions**	See “Creating a Requisition” Job Aid

Requisitions

Req #	Title	Position ID	Department	Date Created	Modify
TAX2003	Administrative Assistant 3	20001000	Taxation	05/12/2008	Edit Disassociate

18.	Click “Add New” to add a **Task**	

Tasks Add New

Subject	Status	Priority	Due Date	Assigned To	Action

19.	Select the person who is “Assigned To” the Task	You can assign it to yourself or another HR User in your agency as a reminder to complete a task associated with the recruitment
20.	Enter a “Subject” and select the “Status” and the “Priority”	▪ These are all required fields. ▪ “Status” (i.e. Not Started, In Progress, Completed, Waiting on someone else, Deferred) and “Priority” (i.e. Normal, High, Low)
21.	Enter a “Due Date” if necessary	

Step	Action	Comments
22.	Mark the checkbox if you want to “Send Email” for this task and enter any “Comments”	
23.	Click the “Save” button	You can add as many tasks as you want

* Required

* Assigned To	Sutherland, Laura
* Subject	
* Status	Not Started
* Priority	Normal
Due Date	
Send Email	☑
Comments	

Save

24.	Click “Edit” to make changes to the Task	You may want to edit the “Status” as necessary
25.	Click “Delete” to delete the Task	

Tasks Add New

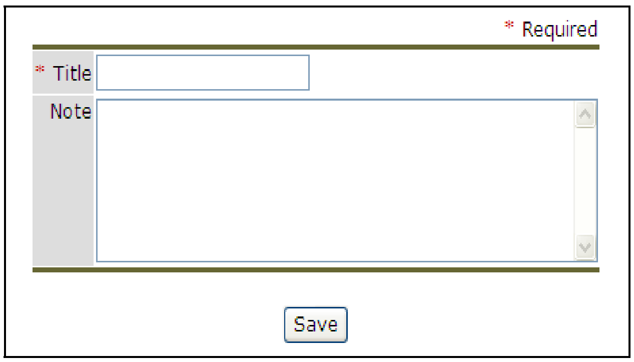
Subject	Status	Priority	Due Date	Assigned To	Action
Schedule Interviews	Not Started	Normal	11/10/2008	Sutherland, Laura	Edit Delete

26.	Click “Add New” to add a **Note** to the Exam Plan	

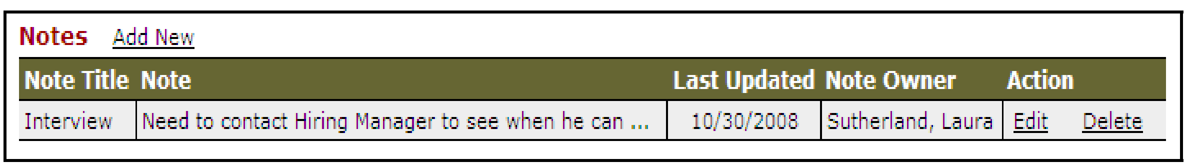
Notes Add New

Note Title	Note	Last Updated	Note Owner	Action

Step	Action	Comments
27.	Enter the “Title” and the contents of the “Note”	Only the “Title” is required.
28.	Click the “Save” button	You can enter as many Notes as needed

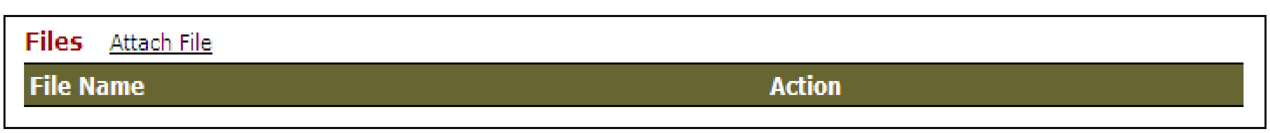


29.	Click “Edit” to make changes to the Note	
30.	Click “Delete” to delete the Note	

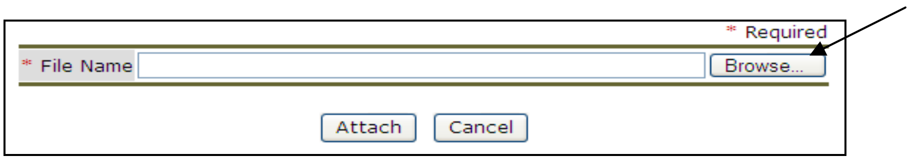

Notes Add New

Note Title	Note	Last Updated	Note Owner	Action
Interview	Need to contact Hiring Manager to see when he can ...	10/30/2008	Sutherland, Laura	Edit Delete

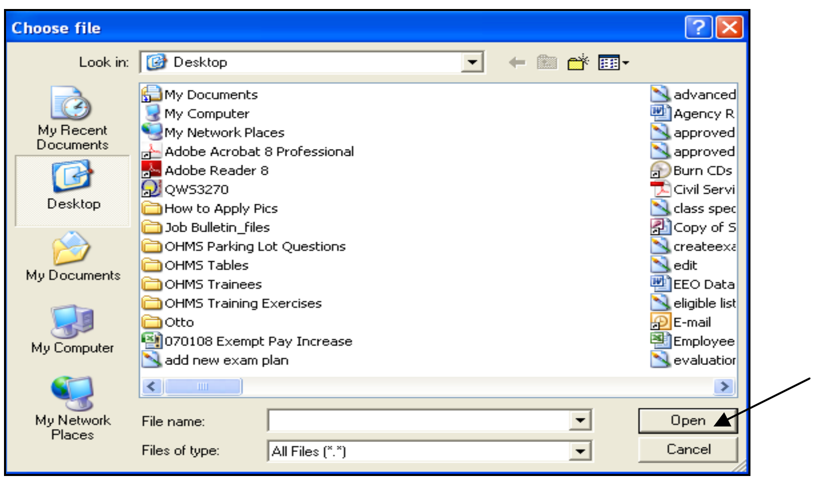
31.	Click “Attach File” to attach **Files** to the Exam Plan	Files, such as the Position Description, can be attached to the Exam Plan



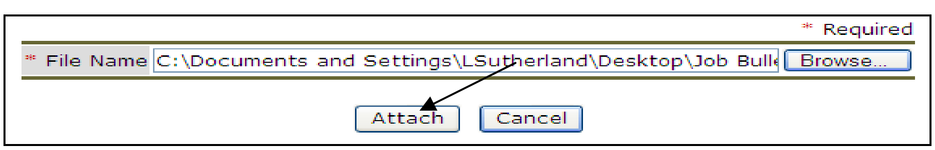
Step	Action	Comments
32.	To attach a file, click the “Browse” button	



33.	Locate the file and click “Open”	



34.	Click “Attach” to attach the file	



Step	Action	Comments
35.	Click “Delete” to delete the file	

Files Attach File

File Name	Action
OHMS Analyst PD.doc	Delete