

Creating Evaluations Steps

The purpose of this job aid is to explain how to create evaluation steps. Creating multiple evaluation steps, and moving candidates through these steps, allow you to organize the candidates by various screening stages. It also explains how to notify candidates of their application status.

Navigation Path: CandidateTrack – Exam Plan

Step	Action	Comments
1.	Log into Insight – Human Resources	
2.	Select the “Exam Plan” option from the “CandidateTrack” drop-down menu	<ul style="list-style-type: none"> ▪ See “Exam Plan Overview” job aid for instructions on creating an Exam Plan if one has not already been created. <ul style="list-style-type: none"> ○ Exam Plans can be created before, during or after the job is posted
3.	Search for your Exam Plan	You can either search by Exam Title or Exam Number
4.	Click on the Exam Plan Title for the applicable Exam Plan	

[Add New Exam Plan](#) | [Show Archived Exam Plans](#) | [List New Resumes](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Search for exam title or exam number:

757 records found.
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Exam #	Exam Plan	Job #	Job Posting	Analyst	Action
20071234mrd	HR Assistant	20028547BJF	HR Assistant	Sutherland, L	Edit Archive

5.	Click “Add Step” next to “Evaluation Steps” to add another step	<ul style="list-style-type: none"> • Step 1 will always be “Application Received” <ul style="list-style-type: none"> ○ This step cannot be edited • You can add a step at any time during the recruitment; before the job is posted, during the posting period or after the posting has expired
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Exam Title HR Assistant		Department Ohio Housing Finance Agency	
Exam Number 20071234mrd		Division	
		Vacancies 1	

[Edit Exam Plan](#)

Job Posting

Job #	Job Title	Status	Last Updated	Assigned To	Action
20028547BJF	HR Assistant	Expired	01/26/09	Laura Sutherland	Edit Delete

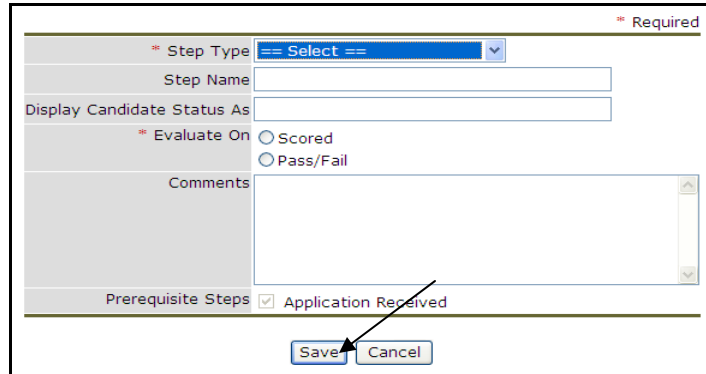
Recruiting Plan [Add New](#)

Ad Type	Ad Name	Requested Date	Start Date	End Date	Action

Evaluation Steps [Add Step](#) [View Applicants \(8\)](#) [View Applicants by Step \(8\)](#) [App Flow](#)

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	8	Filter

Step	Action	Comments
6.	Select "Step Type"	Step Type options are "Supplemental Questionnaire", "Training and Experience", "Written Exam", "Performance Exam", "Oral Exam" and "Other"
7.	Enter "Step Name"	For internal use only (e.g. Minimum Qualifications could be used for the "Supplemental Questionnaire" step)
8.	Enter "Display Candidate Status As"	<ul style="list-style-type: none"> The information entered in this area can be seen by all applicants sitting in this step, regardless of their disposition We suggest typing something generic until you've moved the applicants through the steps (e.g. Reviewing Applications)
9.	Select whether the step will be "Scored" or evaluated on "Pass/Fail"	If the step will be scored, several more options will be available after completing step 10.
10.	Enter any "Comments" and click the "Save" button	If you selected to evaluate the step based on "Pass/Fail" skip steps 11-13



* Required

* Step Type == Select ==

Step Name

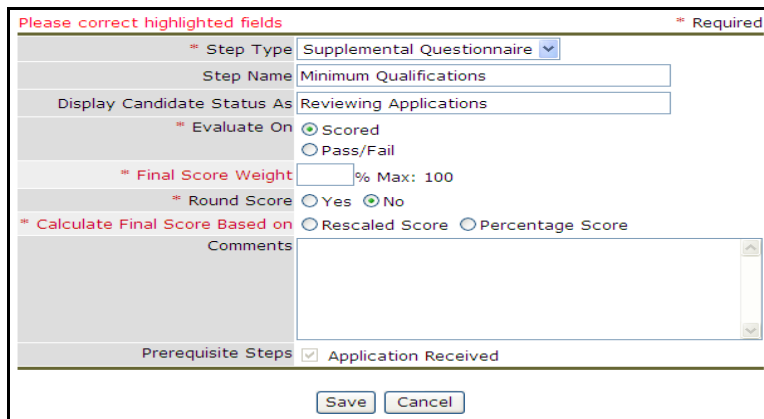
Display Candidate Status As

* Evaluate On Scored
 Pass/Fail

Comments

Prerequisite Steps Application Received

Step	Action	Comments
11.	If you selected to evaluate on “Scored”, once you click “Save” you will also have to enter “Final Weight Score”, “Round Score” and what to “Evaluate Final Score Based On”	<ul style="list-style-type: none"> ▪ Although it says: “Please correct highlighted fields” you are not able to enter these fields until you complete step 10. ▪ See “Scoring Plan Guide 032306”, found by going to Help & Support – Customer Success Center – System Documentation area within Insight, for further explanation on setting up a scoring plan



Please correct highlighted fields

* Required

* Step Type Supplemental Questionnaire

Step Name Minimum Qualifications

Display Candidate Status As Reviewing Applications

* Evaluate On Scored
 Pass/Fail

* Final Score Weight % Max: 100

* Round Score Yes No

* Calculate Final Score Based on Rescaled Score Percentage Score

Comments

Prerequisite Steps Application Received

Step	Action	Comments
12.	If you selected to calculate final score based on “Rescaled Score”, you will also have to enter the “Cut-off Raw Score”, “Max Raw Score” and Rescale Cut-off Raw Score to”	

Please correct highlighted fields * Required

* Step Type: Supplemental Questionnaire

Step Name:

Display Candidate Status As:

* Evaluate On: Scored Pass/Fail

* Final Score Weight: % Max: 100

* Round Score: Yes No

* Calculate Final Score Based on: Rescaled Score Percentage Score

* Cut-off Raw Score:

* Max Raw Score:

* Rescale Cut-off Raw Score to: %

Comments:

Prerequisite Steps: Application Received

13.	If you selected to calculate final score based on “Percentage Score”, you will need to enter “Max Raw Score” and “Passing Score Percentage”	
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Please correct highlighted fields ** Required

** Step Type	Supplemental Questionnaire
Step Name	Minimum Qualifications
Display Candidate Status As	Reviewing Applications
** Evaluate On	<input checked="" type="radio"/> Scored <input type="radio"/> Pass/Fail
** Final Score Weight	<input type="text"/> % Max: 100
** Round Score	<input type="radio"/> Yes <input checked="" type="radio"/> No
** Calculate Final Score Based on	<input type="radio"/> Rescaled Score <input checked="" type="radio"/> Percentage Score
** Max Raw Score	<input type="text"/>
** Passing Score Percentage	<input type="text"/> %
Comments	<div style="border: 1px solid gray; height: 40px;"></div>
Prerequisite Steps	<input checked="" type="checkbox"/> Application Received

Step	Action	Comments
14.	After saving the “Evaluation Step” you will be taken back to the Exam Plan	

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	8	Filter
Step 2	Minimum Qualifications	N/A	View Results	0	Edit Delete Filter

15.	After moving applicants who passed the Minimum Qualifications to the next step, edit the “Display Candidate Status As” for those applicants who failed and remain in this step	<ul style="list-style-type: none"> ▪ Make sure only those failing remain in the step before editing the “Display Candidate Status As” <ul style="list-style-type: none"> ○ In Step 2: Minimum Qualifications, we can change the “Display Candidate Status As” since the only candidate left in the step is Princess Lydia, who has a failing disposition ○ See Steps 16-18 for an explanation on editing the “Display Candidate Status As”
16.	Click “View Exam Plan”	

[View Exam Plan](#) [Eligible List\(s\)](#)

Step 1: Application Received [Step History](#) [Step Comments](#)

Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source	Received	Notices
0 Records Found Page: 1 of 1								
== Select Action ==			== Select Candidate(s) ==			Go		

Step 2: Minimum Qualifications [Step History](#) [Step Comments](#)

Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source	Received	Notices
<input type="checkbox"/> Lydia, Princess	205154	View	Fail - Does not meet the minimum qualifications			Online	06/11/08 11:09 AM	N/A
1 Record Found Page: 1 of 1								
== Select Action ==			== Select Candidate(s) ==			Go		

Step 3: Training and Experience [Step History](#) [Step Comments](#)

Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source	Received	Notices
<input type="checkbox"/> Bennett, Elizabeth	205222	View	N/A			Online	06/11/08 11:09 AM	N/A
<input type="checkbox"/> hardy, judy	203850	View	N/A			Online	06/11/08 10:54 AM	N/A
<input type="checkbox"/> Jones, Jeffrey	203856	View	N/A			Online	06/11/08 11:05 AM	N/A
<input type="checkbox"/> Mortimer, Pamela	204897	View	N/A			Online	06/11/08 11:08 AM	N/A
4 Records Found Page: 1 of 1								
== Select Action ==			== Select Candidate(s) ==			Go		

Step	Action	Comments
17.	Click "Edit" next to the step you want to change the "Display Applicant Status As"	

Evaluation Steps [Add Step](#) [View Applicants \(5\)](#) [View Applicants by Step \(5\)](#) [App Flow](#)

Step	Evaluation Step	Weight	Results	At Step	Action
Step 1	Application Received	N/A	View Results	0	Filter
Step 2	Minimum Qualifications	N/A	View Results	1	Edit Delete Filter
Step 3	Training and Experience	N/A	View Results	4	Edit Delete Filter

Step	Action	Comments
18.	Enter a new status in the “Display Candidate Status As” area, such as “Not Selected”, and click the “Save” button	<ul style="list-style-type: none"> • This will allow candidates not selected for the position to view their application status by checking their profile. • Be careful about changing the status for bargaining unit positions <ul style="list-style-type: none"> ○ Notify the bargaining unit employees that were not selected before changing the “Display Candidate Status As” section • Another option is to wait until a candidate has been selected and edit all evaluation steps to say “Position has been filled”

20071234mrd HR Assistant ** Required

* Step Type Supplemental Questionnaire

Step Name

Display Candidate Status As

* Evaluate On Scored
 Pass/Fail

Comments

Prerequisite Steps Application Received
 Minimum Qualifications
 Training and Experience