

MAKING A VERBAL OFFER
AND
SUBMITTING YOUR SECOND FUND CHECK
A GUIDE TO MAKING YOUR VERBAL OFFER

Making an Offer and Submitting a Second Fund Check, an Overview : Academic, Research, Teaching & Professional Services Staff

WHY, HOW & WHAT:

Once you have completed your interviews and decided upon an appointable candidate, you will be ready to make an offer both verbally and in writing.

Confirmation of these steps must be completed using the School's e-Recruitment system. This is important for three key reasons:

1. Updating your recruitment and candidate journey in the School's e-Recruitment system enables the School to gather meaningful data in relation to the recruitment process. This data is used for reporting papers such as HESA, Athena Swan, the VCAC report and much more. It also supports us to undertake reviews of our recruitment processes and report on progress relating to our EDI commitments.
2. Updating the outcome of your successful candidate on the School's e-Recruitment system enables a process which ensures that the offer letter is sent out to the candidate in a timely fashion. Without following this process, the offer letter cannot be sent.
3. Updating the outcome in the system enables you to gain visibility of the candidates salary which is essential to supporting you in negotiating your candidates offer details.

The offer status and second fund check must be submitted using the School's e-Recruitment system. The request is comprised of four core stages, all of which take place within the e-Recruitment system:

1. Progress your candidate to verbal offer stage to reveal salary details.
2. Once the offer has been made to the candidate, first complete the checklist and then the second fund check.
3. Approval of the offer from your HR Adviser (for offers within the standard salary range), *or* approval of the offer from your HR Partner (for offers within the contribution zone)
4. Approval of the offer from your Financial, Planning & Analysis (FP&A) Manager.

Once these stages are completed, your HR Administrator will send out the offer letter within three working days.

Timescales:

- Your FP&A Manager has up to three working days to approve your request. Should you require approval sooner than this, you should contact them directly.
- Your HR Adviser has one working day to review your request. Should you require a review sooner than this, you should contact them directly.
- Your HR Administrator will circulate the offer letter within three working days.

Making an Offer and Updating the System

Congratulations, you have a candidate that you wish to appoint.

You will now need to contact your candidate to make a verbal offer.

Additionally, so that the Human Resources team can extend a formal written offer to your chosen candidate, you must first complete the **Offer Checklist** and then complete the **Second Fund Check** within the e-Recruitment system.

It should be noted that non-completion of this process and relevant approvals will prevent the offer letter from being sent.

Useful Information/Access Links:

To access the e-recruitment system please click [here](#).

To familiarise yourself with the Recruitment Journey review the recruitment infographic [here](#).

To access the Recruitment Toolkit, please click [here](#).

To see a list of your HR contacts, please click [here](#).

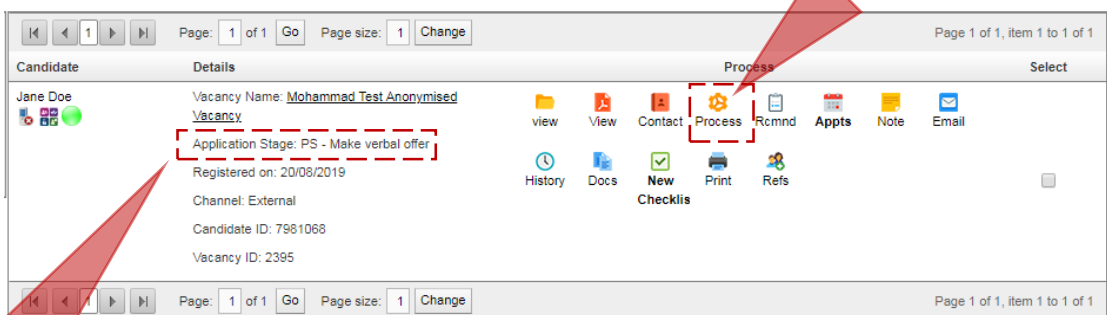
For the School's Starting Salary Policy and Procedure (Professional Services Staff), please click [here](#).

MAKING A VERBAL OFFER

Prior to making your verbal offer, you will need to ensure your chosen candidate's salary is visible to you. To do this, you will need to move your chosen candidate to: **PS – Make Verbal Offer**.

To do this, you should be logged into the e-Recruitment system and select the **Home** tab. Here, you can use the **process** icon to move your candidate to the appropriate stage. Once you have done this, the candidate salary will appear on their application. This should be used as a guide when making your verbal offer.

Advice and guidance can be sought from your HR Adviser or HR Partner where appropriate in relation to verbal salary offers.

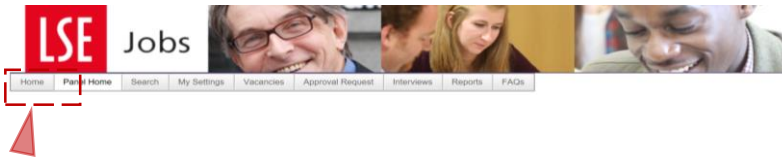


UPDATING THE SYSTEM:

Now that you have made your offer, you will need to first complete the checklist and then the second fund check in the e-Recruitment system so that your offer letter can be sent.

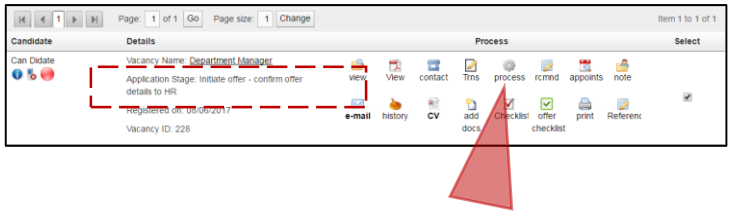
STEP ONE:

To submit your second fund check, you will need to go to the **Home** tab. From here, you will note your vacancy below. Click the **+** button to locate your candidate within the relevant campaign.



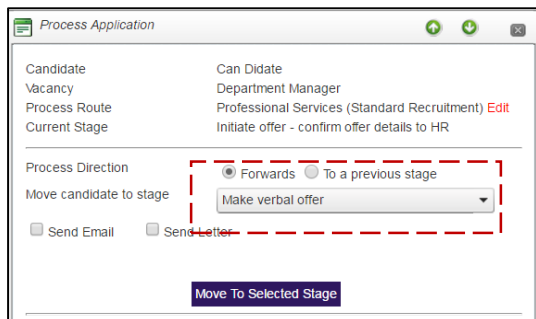
STEP TWO:

The successful candidate you wish to appoint must be at the **Initiate Offer- confirm offer details to HR** stage in the e-Recruitment System for the request to be processed. To move your candidate to this stage, you will need to select the process icon as highlighted below.



STEP THREE:

After selecting the process icon, from the drop down list you will need to select the appropriate stage to move the candidate to in order to initiate the process to request the second fund check approval.



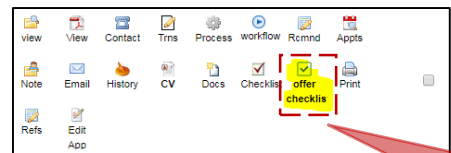
STEP FOUR: Once the candidate has accepted the verbal offer, you will need to progress the candidate to the next stage in the e-Recruitment system: **Verbal offer accepted – initiate second fund check.**

This involves you, as the hiring manager, completing two key steps in the e-Recruitment system:

1. The Offer Checklist
2. Second Fund Check **Workflow**

Post Interview Feedback: You must remember to move unsuccessful candidates through the e-Recruitment System to the **'Regret after Shortlisting'** stage. Further guidance on interview feedback can be found in the Recruitment Toolkit [here](#).

THE OFFER CHECKLIST: The full details for the appointment letter now need completing, including the duration of the review period. Select the **Offer Checklist** icon on the candidate's **record**, highlighted below:



The Offer Checklist has two sections.

The first section relates to the 1st Fund Check that was initially carried out when the vacancy was approved.

This section will have all the details copied from the 1st Fund Check form, and will be greyed out. You will not be able to add to or modify details in this section.

The second section of the form relates to **the 2nd Fund Check that must be approved by Finance / Research**, before a written offer can be made to the candidate.

As the hiring manager you must complete the relevant sections of the offer checklist, as these items will be merged into the appointment letter.

Please do not enter anything in the section titled **Funding and HR Approval Names and Comments Only**. This section is for Finance and HR approvers.

Once all required details have been entered, please press the **Submit** button and move to the next step, the Second Fund Check which must be completed using the **Workflow** icon.

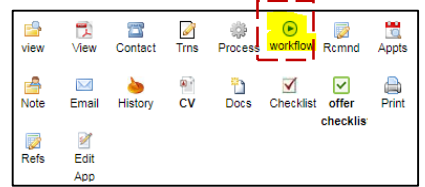
Key Information:

- 1) The Offer checklist must be completed first so that the 2nd fund check is populated.
- 2) The candidate **must** be at 'verbal offer accepted- initiate second fund check' for the workflow button to appear.

THE WORKFLOW AND YOUR SECOND FUND CHECK:

You must now complete the **Second Fund Check**.

Once the Offer Checklist has been completed, the Second Fund Check approval process needs to be started using the **Workflow** icon. For information on how to do this, refer to the "Creating a Vacancy Request" guidance document.



STEP ONE: You will need to choose the appropriate workflow from the drop-down list for **Workflow Definition**.

You should select one of the four workflows which have names starting with 'Second Fund Check' and ending in '(Jan 2019)'

STEP TWO: Once you select the right workflow you should name it. This name should be the same name which you used for the first fund check at the start of the recruitment process.

You will also need to provide your email address and select the Finance and HR approvers from the drop-down lists

Finally, press the 'Start Workflow' icon to send the Second Fund Check request to the approvers.

YOUR REQUEST TO APPOINT HAS BEEN COMPLETED, WHAT NEXT?

An automatic system notification will be sent to your HR Adviser (or HR Partner if the salary offer sits within the contribution zone) who will review your request and confirm the outcome within two working days. You will receive confirmation of the outcome via an email from the system which will be sent to you immediately once the outcome is determined.

POSSIBLE OUTCOMES:

- **Approval by HR** – if your request is approved, you will receive an email from the e-Recruitment system to notify you of this.
- Following this, your **FP&A Manager** will receive an automated notification asking them to log in to the system to review your request. They will review the content of the request to appoint and confirm the availability of funding. Obtaining this approval ensures that you remain compliant with the School's [Financial Regulations](#). No hiring or written offers should be undertaken without approval from your FP&A Manager. The FP&A Manager will review and confirm the outcome of your request within three working days. If your request is approved by the FP&A Manager, you will receive another email from the e-Recruitment system to notify you.
- **Rejection** – if your request is rejected by either HR or your FP&A Manager, you will receive a notification from the e-Recruitment system. Reasons for rejection may include: incorrect budget codes, insufficient monies to support the hire or any other misinformation. You will need to discuss the reasons why with either your HR Adviser or FP&A Manager and re-submit if appropriate.

ONCE YOUR REQUEST IS APPROVED:

Following this the HR Administrators receive an automatic email from the system notifying of approval and to prepare the offer of appointment letter. This will be sent to your successful candidate within three working days.