MAKING AN OFFER
A GUIDE TO SUBMITTING COMPLETING YOUR SECOND FUND CHECK USING THE SCHOOL’S E-RECRUITMENT SYSTEM.
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 two 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.

What you need to do:

1. Complete the Offer Check List.
2. Complete the Workflow to submit your Second Fund Check request.

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

1. Completion and submission of the second fund check and offer check list.
2. 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).
3. 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.

**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.

So that the Human Resources team can extend a formal written offer to your chosen candidate, you must submit a Second Fund Check, and complete the Offer Checklist 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.

**STEP ONE:**

To submit your second fund check, you will need to go to Panel Home. 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 in order 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

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 1<sup>st</sup> Fund Check that was initially carried out when the vacancy was approved.

This section will have all the details copied from the 1<sup>st</sup> 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 2<sup>nd</sup> 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 if 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.

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 WORKFLOW AND YOUR SECOND FUND CHECK:

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

Once the Offer Checklist has been completed, the 2nd Fund Check approval process needs to be started using the **Workflow** icon. Need a reminder on what to do? 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 ‘2nd 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 email 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. 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.

Timelines:
The HR Adviser will review and confirm the outcome of your request within two working days.

POSSIBLE OUTCOMES:

• **Approval** – 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 also receive an automated email asking them to log-in to the system to review your request. Information regarding this can be found below.

• **Rejection** – if your request is rejected, you will receive an email from the e-Recruitment system to notify you of this. Reasons for rejection may include: incorrect budget codes, insufficient monies to support the hire, any other misinformation.

HUMAN RESOURCES HAVE APPROVED YOUR REQUEST TO APPOINT, WHAT NEXT?

Requests to recruit will be sent to your FP&A Manager once financial approval has been given by your HR contact. Your FP&A Manager will receive an automated system notification email of your request to recruit they will review the content of the request to appoint and confirm the availability of funding.

This check, which is carried out by your FP&A, is a review to confirm the availability of monies to fund your post.

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.

Timelines:
The FP&A Manager will review and confirm the outcome of your request within three working days.

POSSIBLE OUTCOMES:

• **Approval** – if your request is approved, you will receive an email from the e-Recruitment system to notify you of this. Following this, the HR Adviser will confirm the outcome to the HR Administrator who will prepare the offer letter to be sent within no more than three working days.

• **Rejection** – if your request is rejected, you will receive an email from the e-Recruitment system to notify you of this. Reasons for rejection may include: incorrect budget codes, insufficient monies to support the hire, any other misinformation.