

REGULAR JOB OFFER CHECKLIST & CHEAT SHEET

Unit Verbal Contingent Offer Checklist

Check the following items prior to extending verbal offer:

1. ____ Has a salary and/or negotiable salary range been determined and approved by appropriate parties?
2. ____ Has the Restricted Table check been performed for the selected candidate with satisfactory results?
3. ____ Has Image Now/WebNow personnel files been reviewed for the selected candidate with satisfactory results?
4. ____ Have references been checked on the selected candidate with satisfactory results?
5. ____ Have pre-screening questions and answers been reviewed on the selected candidate's Application document and any issues resolved? Follow up with EPC to resolve issues if necessary.
6. ____ If the job opening has an Affirmative Action goal, have the Applicant Summary Report and Availability Data report been reviewed?
7. ____ **(Health System only)** If PEP screening is required for this position, has the selected candidate passed?

EPC & Unit Offer Checklist

Check the following items when preparing an offer in eRecruit and reviewing job offers for approval:

1. ____ If filling at an underfill level, is the appropriate job code designated as Primary in the Job Opening Details? (Note: Unit to complete prior to preparing an offer in eRecruit.)
2. ____ Have all candidates, who were seriously considered and/or interviewed for the job opening, received an appropriate disposition? (Note: Unit to complete prior to preparing an offer in eRecruit. See *Disposition Guidelines* document on MyLINC for further detail on setting dispositions.)
3. ____ Is visa sponsorship needed? (Review the prescreening questions and answers on the Application document.)
4. ____ If the selected candidate is internal and covered by a bargaining agreement, has (s)he held the current position for the duration as outlined in the agreement?
5. ____ If a department specific transfer or offer letter was provided to the selected candidate, has the unit uploaded and attached the document to the job opening? EPCs: If applicable, ensure a letter is attached to the job opening.
6. ____ **(Health System only)** EPC verifies the selected candidate has passed PEP screening, if applicable.
7. ____ **(EPC only)** If the job opening has an Affirmative Action goal, has the goal email been uploaded and attached to the job opening?
8. ____ Has the background check been completed with satisfactory results?

9. ____ Have all the Offer fields been populated correctly? Use the checklist below for verification:
- a. ____ Does the Posting Title reflect the correct Working Title? If not, return to Job Opening to edit Posting Title. (Note: Working Title cannot be the same as any active Market Title or reflect an obvious inflation of the title.)
 - b. ____ Does NEO date allow enough time for selected candidate/new employee to have background check information and self service completed? (Note: Recommend minimum one week period from time of offer preparation.)
 - c. ____ Are Appt Begin and End dates accurately added? (Note: End date is not required for most appointments.)
 - d. ____ If your unit uses Manager Desktop, is the correct Supervisor ID for the job opening entered?
 - e. ____ Is sponsored project pool selected if applicable?
 - f. ____ Is the Work Address correct? Specific fields to complete include Address 1 (Dept name), Address 2 (Room Number and Bldg), City, State and Zip/Campus Code and ten-digit Work Phone.
 - g. ____ If the selected candidate is internal, has the radio button for Additional Appointment or Transfer been turned on and is applicable information included in the Offer Comments field?
 - h. ____ Does the Offer Comments field include information related to the following topics OR is separate documentation attached, if applicable:
 - Any issues related to how the selected candidate answered the pre-screening questions
 - If the selected candidate is a temp to regular conversion for bargained or for non-bargained staff
 - Any exceptions on the job opening to salary
 - Responses on on-selected RIF candidates
 - If the job opening is an underfill
 - If the job opening had an Affirmative Action goal, any comments pertaining to additional outreach or the diversity of the applicant pool
 - i. ____ Are the correct Approvers identified? (Note: For Nursing job offers, DELETE the Nurse Recruiter approver who populated over from the job opening and ADD your EPC and the only, last and Primary approver.)

References to applicable Standard Practice Guide topics:

- 201.18 Employment of non US Citizens
- 201.20 Employment of Minors
- 201.22 Recruitment and Selection of all Regular Faculty and Staff
- 201.23 Appointment of Relatives or Others with Close Personal or External Business...
- 201.24 Employment of Students

Unit Cheat Sheet: Use the below field descriptions for reference during Offer preparation and/or review

Navigation: MENU > RECRUITING > FIND JOB OPENING (search for & select job opening) > use drop down box in TAKE ACTION column and click on

PREPARE JOB OFFER (in row of selected candidate)

<u>FIELD</u>	<u>REQUIRED?</u>	<u>DESCRIPTION/COMMENTS</u>
Job Opening	Yes	Pre-populates automatically; no action needed
Admin	Yes	Type in or use finder icon to select appropriate Admin Department
Appt	Yes	Populates over from job opening; no action needed
Job Code	Yes	Populates over from job opening. In the case of an underfill, ensure correct Job Code appears
NEO Date	No	Type in or use calendar icon if desired/known
Appt Begin Date	Yes	Populates over from job opening if date was entered during creation; otherwise type in or use calendar icon to select start date
Appt End Date	No	Populates over from job opening if date was entered during creation. Type in or use calendar icon to select Appt End Date if applicable (term limited position)
Offer Date	Yes	Pre-populates with current date; may be changed if appropriate
Supervisor ID	No	Type in or use finder icon to select Supervisor; information will populate over to Manager Desktop. Note: if using finder icon, type search parameters in before clicking "Look Up" to avoid long search times, as all active UM employees are available for lookup
HR	Yes	Populates over from job opening; may be changed if applicable
Letter/Date	No	For EPC use only; no action needed
Status	Yes	Populates automatically; no action needed. Note: Status of Offer is updated by the EPC and automatically by the system throughout Offer/Hire process
Reason	No	For EPC use only; no action needed
Created By	Yes	Pre-populates and hard coded; no action needed
Pay Group	Yes	Populates automatically based on job code; may be changed if applicable
Standard Hours	Yes	Populates over from job opening; may be changed if applicable
Comp Rate	Yes	Type in annualized Comp Rate and press tab to populate related hard coded fields of Hourly, Daily, Biweekly, Monthly, Annual OR select appropriate Appointment Period and type in FTR Rate (see next two rows for details) to populate Comp Rate and related fields
Appointment Period	Yes	Use drop down box to select appropriate Appointment Period. Note: If incorrect Appointment Period is selected, an error generates upon submitting offer
FTR Rate	Yes	Populates automatically if Comp Rate and Appointment Period have been designated. If Comp Rate is blank, type in FTR Rate associated with the Appointment Period and press tab to populate Comp Rate and related hard coded fields
Unit PCN	No	Populates over from job opening if PCN was entered during creation. Type in Unit Position Control Number if applicable
Effective Date	Yes	Populates over from Appt Begin Date. When using multiple effective dates on DBE rows, at least one must match the Appt Begin Date.
Sponsored	No	Use drop down box to select Sponsored Project Pool if applicable
Funding End	No	Type in or use calendar icon to select Funding End Date related to Pool if applicable
Shortcode	Yes	Type in or use finder icon to select appropriate Shortcode. Press tab to populate the related hard coded fields of Fund, DeptID, Prog, Class, Proj/Grt. Note: additional shortcode(s) may be included by clicking  located on the far right side of the panel. If adding a shortcode, a blank panel generates; click View All to see all panels on one page
% Effort	Yes	Type in % Effort related to Shortcode. Total of all panels must = (Hours in the Standard Hours field / 40.00 Hours) *100
% Dist	Yes	Type in % Dist related to Shortcode. Press tab to populate the related hard coded field of Comp Rt Dist. Total of all panels must = 100%
Address 1	Yes	Populates based on job code; may be changed if applicable
Address 2 (and	No	Type in street address of work location
City	Yes	Type in City of work location
State	Yes	Type in or use finder icon to select State of work location
Postal	Yes	Type in five digit zip code and campus zip if applicable (XXXXX – XXXX)
UM Work	Yes	Type in work phone number including area code; system will auto format to XXX/XXX-XXXX

If Additional Appointment or Transfer, click appropriate radio button; if external new hire, leave blank or click None button.

Offer Comments to include: any special information if the selected candidate is an Additional Appointment or Transfer, reasons for non-selected RIF candidates (unless attached in a separate document), additional outreach or diversity of candidate pool if job has an AA goal

Offer Approvers Add Approvers	Yes	Type a number in Seq# field to designate the order of the workflow approval email to each Approver. Type in EMPLID or use finder icon to select Approver. Note: at a minimum the EPC is required as the final and Primary Approver. Placing a check mark in the Primary field filters the finder icon results to only EPC lever employees.
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Click [Submit](#) to start approval workflow emails