

GSA JOB OFFER CHECKLIST AND CHEAT SHEET

Unit Verbal Contingent Offer Checklist

Check the following items prior to extending offer to selected candidate:

1. ____ Have fraction calculation, and salary been determined and approved by appropriate parties?
2. ____ Has the Restricted Table been checked for the selected candidate with satisfactory results?
3. ____ Have pre-screening questions and answers been reviewed on the selected candidate's Application document and any issues resolved?
4. ____ Is this appointment greater than 75%? If so, has the Academic Advisor been contacted?
5. ____ Does candidate have another active appointment? If so, has other employment department been contacted?
6. ____ Have you identified the appropriate EPC as the primary and final offer approver?

Offer Checklist

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

1. ____ 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 My LINC for further detail on setting dispositions.)
2. ____ Is visa sponsorship needed? (Review the pre-screening questions and answers on the Application document). If so have the appropriate steps been completed to obtain sponsorship?
3. ____ If a department specific transfer or offer letter was provided to the selected candidate, has the unit uploaded and attached the document to the selected candidate?
4. ____ Has a Contact Note been created indicating the employee's actual first date of employment on the subject line?
NOTE: THIS STEP FOR ANN ARBOR CAMPUS ONLY
5. ____ Have all the Offer fields been populated correctly? Use checklist below and cheat sheet for verification:
 - a. ____ Are Appt Begin and End Dates accurately added?
 - b. ____ Does Appt Period accurately reflect the Appt Begin and End Dates?
 - c. ____ If your unit uses Manager Desktop, is the correct Supervisor ID for the job opening entered?
 - d. ____ 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.
 - e. ____ If this is for an Additional Appointment or Reappointment (Transfer) is the appropriate radio button selected and is applicable information included in the Offer Comments field?
 - f. ____ Does the Offer Comments field include information related to the following topics OR is separate documentation attached, if applicable:
 - Any issues related to the hire or selected candidate
 - Any salary exceptions
 - g. ____ Are the correct Approvers identified?
 - Must have at least one approver who authorizes department funding
 - Add Ron Dick as approver if appointment is >60 days retroactive (required)
 - Identify the EPC as the primary and final approver

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)

FIELD	REQUIRED	DESCRIPTION / COMMENTS
Offer Details		
Job Opening	Yes	Defaults from Job Opening; no action needed
Admin Department	Yes	Type in or use the finder icon to select the dept ID for the department responsible for the terms and conditions of the appointment
Appt Department	Yes	Defaults from Job Opening; no action needed. Or, update as needed
Job Code	Yes	Defaults from job opening - non modifiable
NEO Date	No	New Employee Orientation is not handled centrally, so a date is not needed
Appt Begin Date	Yes	Defaults from job opening if date was entered during creation; otherwise enter date or use calendar icon to select start date. Should typically reflect beginning of a term (9/1, 1/1, 5/1 or 7/1)
Appt End Date	Yes	Defaults from job opening if date was entered during creation; otherwise enter the date or use calendar icon to select appt end date. Should typically reflect end of a term (12/31, 4/30, 6/30, or 8/31)
Offer Date	Yes	Defaults to current date; may be changed if appropriate
Supervisor ID	No	Type in or use finder icon to select Supervisor; information populates 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
Department Contact	Yes	Defaults from job opening; may be changed if applicable; EMPLID "Look Up" is available to search for department contact (individual to be contacted if there are questions). Note: the contact also receives daily digest of new hires that have not completed self-service onboarding.
Letter/Date Printed	No	Generates letter to selected candidate; drop menu available only after offer has been approved and status is "accepted". A copy of the generated letter is stored in the Contact Notes for the selected candidate
Status (Offer)	Yes	Populated automatically; no action needed until offer is approved. Must then be changed to "Accepted" in order to complete the Prepare for Hire panel
Reason	No	This refers to the reason for the offer status. Not all offer statuses have an associated reason
Created By	Yes	Defaults the name of the person creating the offer
Other Employing Department Contacted	Yes	Required if applicant has another active appointment; check box to indicate contact was made ** field appears only if there is another active appointment
Job Details		
Pay Group	Yes	Populates automatically to MGS Grad Student; no action required
Standard Hours	Yes	Populates automatically from Job Opening. If no hours are indicated in Job Opening, enter number of hours applicable to the applicant
FTE	Yes	Full Time Equivalent for standard hours. Defaults from standard hours and is not modifiable
Comp Rate	Yes	Enter the compensation rate in a monthly value
Frequency	Yes	Defaults based on job code; no action required
Salary Admin Plan	No	Defaults from Job Code table; includes, salary grade, hourly, daily, bi-weekly, monthly, and annual rates
Appointment Period	Yes	Enter the correct value for length of appointment. Choose from drop down list
FTR Rate	Yes	Full Time Rate. Defaults from Comp Rate and 40 Standard Hours
Unit PCN	No	Enter Alpha/Numeric value based on departmental usage of position control numbers
Appropriate approval granted for >75% appt	Yes	If total number of standard hours is greater than 30, must speak to the student advisor and get approval to process appointment. Check box to indicate the approval was granted

Department Budget Earnings (DBE)		
Effective Date Detail		
Effective Date	Yes	Populates automatically; no action needed. Can be changed on added rows. When using multiple effective dates on DBE rows, at least one must match the appointment start date
Prior Effdt	Yes	Defaults from job if appointment exists
Funding End Date	No	Enter funding end date if used by department processes. Does not end pay. When using multiple DBE rows, at least one must match the appointment end date
Earnings Distribution Detail		
Shortcode	Yes	Enter shortcode 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	Enter Percent of effort associated with standard hours to be paid from the shortcode
% Dist	Yes	Enter % Dist related to Shortcode. Press tab to populate the related hard coded field of Comp Rt Dist. Total of all shortcodes entered must = 100%
UM Work Address		
Address 1	Yes	Populates based on job code; may be changed if applicable
Address 2 (and 3)	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 Address Voice	Yes	Type in work phone number including area code; system will auto format to XXX/XXX-XXXX
Fraction Calculation Forms		
Add Fraction Calculation Form	No	Click link to create new form. Note: May selected from library if one was created. Only one form should be associated with each offer.
Sequence #	No	Only required if including a Fraction Calculation with job offer. Defaults from job opening
Name of form	No	Defaults; displays name given form when created
Radio Buttons	No	Enter value if candidate has a current appointment to accurately reflect this hire as an Additional Appointment or Transfer. Click None if error is made during data entry and you need to leave field value blank
Offer Comments to include: any special information related to the hire or information on job offers that have been withdrawn or rescinded. Comments should be entered prior to changing the Offer status to Withdrawn or Rescinded.		
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 level employees. Include Academic HR (Ron Dick) as an approver if appointment is processed >60 days past the date of hire (<i>note: system will display error if this approval is not added</i>)
Click Submit to start approval workflow emails		