

Completing an Offer Grid in Taleo

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What is the Offer Grid?

The University uses Taleo, an online recruiting system, to manage the recruitment of permanent and fixed-term appointments. This can be either Advertised or Unadvertised (Direct to Offer (DTO)) A requisition will have already been completed by this stage, with the details of the role needing to be filled, and a candidate selected.

The Offer Grid is where you enter the information about both the role and the candidate's appointment details such as their salary, and working hours. The candidate's selection step status should be updated to "Offer – Offer to be made" (for a DTO the step and status will automatically be set to Offer – Offer to be Made if the correct Candidate Selection Workflow has been selected in the requisition) and when you click on their name, you can select 'More Actions' and then 'Create Offer'.

The Offer Grid is usually completed and submitted for approval through the appropriate approval chain by Client Services on behalf of the Hiring Manager.

What you need before completing the Offer Grid

- The position title as it should appear on the Letter of Offer
- The primary location of the role
- If it is a confirmation path position (see [Confirmation Path Policy](#))
- Who the position reports to (name and title)
- If the preferred candidate is new to the University or an existing staff member
- If an existing staff member, department/position information for the job they are leaving
- Start date
- If fixed term, the end date
- Position type (full-time, part-time, etc.)
- Hours per week (or % of FTE for academic)
- Schedule details if not standard (e.g., 8:30am to 2:00pm Monday to Thursday)
- Student status, if applicable (are they enrolled)
- Employment agreement (contact your HR Administrator if you are uncertain)
- Salary information
- Information on which account(s) the salary will be paid from
- Information on any applicable allowances (relocation, establishment grant, recruitment and retention etc.)

Completing the Offer Grid

Offer Grid sections

The Offer Grid is in three sections: top section, general terms, and details. You will find further details about the fields in each section listed below in the tables. If you are unsure about how to complete the Offer Grid you can find information in both the [Hiring Manager Process Guide](#) and the [Offer Grid Fact Sheet](#). If you cannot find the answers you need in these documents you can call or email [your HR Administrator](#) for assistance.

Populating fields from the Requisition

You can pull through information from certain fields in the requisition for a number of fields in the Offer Grid. This can be done line by line, or whole sections by clicking on the icon to the right (it looks like two pages with an arrow).

Note that with multiple account codes, you can pull through the first two, after that, they will need to be manually entered.

Saving a draft of the Offer Grid

You will note that a number of the fields have an asterisk beside them. These fields are required to save the Offer Grid in Taleo. They are not, however, the only information required for the Letter of Offer to be produced. This guide will provide supplementary advice on which fields need to be filled out in order to provide a complete and compliant Letter of Offer to your chosen candidate.

Attachments

Ensure any documentation supporting the offer details is attached. For example, a signed Recruitment and Retention (R&R) application.

Approval chains

Once the Offer Grid has been completed, you need to list the approvals required and submit for approval. Finance Advisory is not included in the Offer Grid approval as they will have already approved the requisition. If you are unsure of who the approvers are please check with your manager.

Checking and extending the offer

Once the Offer Grid has been approved by everyone in the chain, HR Services will be notified. They will check the Offer Grid, make any corrections, or check back with department or other areas if they need further information. Once all checks have been completed, the offer is extended electronically to the email address the candidate provided.

Automatic notifications and checking the status in Taleo

The 'recruiter' in Taleo (the staff member who initiated the requisition):

- Will receive a notification when the offer has been extended, and when the candidate has accepted the offer.
- Can check the status of the offer in Taleo.

Taleo Offer Statuses

Draft – Offer Grid has been completed and is ready to be sent for approval

Approved – offer has been fully approved and will appear on the Approved Offers report generated to HR Services (please note that if an offer is approved after 8am it will appear on the next day's report)

Extended – a Letter of Offer (EOffer) has been sent,

Accepted – the candidate has accepted the offer

Refused – the candidate has declined the offer

Offer Grid fields walkthrough

Top Section

Status

The status is generated automatically and will show either **draft**, **pending approval**, **approved** or **extended**.

When you are first creating an Offer Grid you need to enter information in all of the fields with an asterisk in order to save the offer. This will automatically set the first status – ‘draft’ – and add a date stamp. After this you can add information and re-save in draft form until you have everything you need, then the offer can be submitted for approval. This will proceed through the approval chain for your department, until everyone has approved it at which stage the status will update to ‘approved’ and will be date stamped. At this point the offer is approved in principle, but still needs to be checked by HR Services. They may make some corrections or seek further information before extending the offer. Sometimes they can re-approve they offer themselves, for example if they obtain more information about the candidate’s employment and are updating the commencement type, but other times they’ll need to make the change and resubmit the offer through the approval chain again.

Note: Once an offer is approved, the only fields that can be edited are the expiration date and the commencement date. If any other fields need to be corrected or updated, please contact HR Services as the offer is now sitting with them.

Position Title

Enter the Position Title as it should appear on the Letter of Offer. This should be the same as in the Job Description. Note: For academic offers, the position should be the standard Academic title (e.g., ‘Lecturer’ not ‘Lecturer in Speciality’).

Some Job Descriptions may have more than one title, e.g., Lecturer/Senior Lecturer. This can occur when a vacancy has been advertised and the department is flexible on either. In this case, make sure the title here matches the remuneration that has been approved and that the JD has been updated.

Position Title (Standard Academic)

Choose from a list of standard Position Titles. Note: This field does not appear in the Offer Grid for Professional staff roles.

This can differ from the above field. The position being appointed may be a Director role, but the candidate’s title is Senior Lecturer.

See [Academic Titles \(Otago website\)](#) for more.

Primary Location

Choose from a list of locations. This field can be populated from the requisition, but if the preferred candidate ends up being in another location

(e.g., if they are working remotely) this can be updated here.

Confirmation Path	<p>This tick box should be checked for all permanent Academic staff appointments at Lecturer level and above*, where the candidate is new or unconfirmed.</p> <p><i>*This includes Lecturer, Senior Lecturer, Associate Professor and Professor.</i></p> <p>See the Confirmation Path Policy for more.</p>
Position Reports to Name	Name of the new employees direct Manager/Supervisor.
Position Reports to Title	<p>Position title of the new employees direct Manager/Supervisor.</p> <p><i>The Manager/Supervisor can sometimes hold two positions, such as Head of Department and PI (Primary Investigator), so make sure to put the correct title here, for example Professor J Bloggs, Head of Department if the role would always report to the Head of Department, or Professor J Bloggs if it is reporting to that individual in their non Head of Department capacity, It might help to think if that person changes to another position, would this appointment follow them, or be transferred to their replacement.</i></p>
Created on	This is a system generated field that populates when you first save the Offer Grid. By now, all of the fields with an asterisk have been populated (you cannot save otherwise).
Expiration Date	<p>This field is automatically generated, and you don't need to change it.</p> <p><i>This is the expiration date of the offer. Once the Offer Grid has been received by HR Services (after the Offer Grid has been approved) and the offer is ready to be extended, they will amend the date. This will normally be three business days from the date of the Offer Letter. If the candidate hasn't responded in that time, HR Services will check in with the hiring manager and can push the date out further if that is requested</i></p>

General Terms

Commencement Type Although you will not necessarily be able to confirm the commencement type, this is a mandatory field. Select the option to the best of your knowledge from the list, and HR Services will check (and amend if required) this field.

Commencement types

- New staff member
- Ex-staff member returning to the University
- Additional position offered to a current staff member
- Term as HoD or Secondment offered to current staff member
- Current staff member transferring from another position

See Commencement Types below.

HR Services will check the payroll system to verify if the employee is new, or has been previously, or is currently, employed by the University.

Details of Current Position Enter department and position information for those currently employed at the University. If you don't know, this can be left blank.

This information is for data quality control only, it doesn't feed into the Letter of Offer or payroll system.

Commencement Date (Tentative) This usually starts as a tentative date, and the "tentative" tick box will default to ticked. If the date has yet to be agreed, you can leave this blank. If the date is firm though, you can enter it and untick the box. Make sure this date is not a weekend, or a public holiday.

This date will feed through to both the Offer Letter and the payroll system. Whilst this field can be left blank a date will be needed for the appointment to update in the payroll system. When intentionally leaving this blank please ensure that there is notification, in Additional Details, of Date to be Agreed needing to be in the Letter of Offer

Fixed-term End Date Complete only if the position is fixed term.

Full-time/Part-time/Variable (Timesheet)

Select the appropriate radio button (note: to save, you must change this from the default “Not Specified”).

For variable hours minimum hours must be provided (along with minimum you can also include maximum hours if you require a person to be available up to those maximum hours). This could be per week, per month, per semester etc. The reason a minimum number of hours must be stated is NZ employment laws prohibit contracts with zero hours (this excludes casual appointments where the requirement is “as and when required” therefore there is no requirement to guarantee any hours). This information can be added either in the “Days and Hours of Work” field, or in the “Additional Details” field at the end of the Offer Grid.

Academic FTE / Hours per week

If the Offer Grid is for an academic staff member, enter 1 for full-time or an appropriate decimal (e.g., 0.5, 0.75 with 0.01 being the minimum).

If the Offer Grid is for a professional staff member, enter the actual hours to be worked per week in the top box (“Hours Per Week”) and then specify the number of hours considered full-time for that position (“Standard Hours Per Week”).

For most professional staff, 37.5 hours constitutes an ordinary full-time week’s work. However, for Trade Supervisors and workers engaged in trades related work and kitchen and domestic staff working in the Residential Colleges, 40 hours each week will constitute an ordinary week’s work.

See [FTE – Hours conversions \(37.5 hr work week\) chart](#) below.

Days and Hours of Work
(if not standard)

Enter details if days/hours are not standard*. This information will show on the Letter of Offer.

**Standard roster details would be 8:30 – 5pm, Mon to Fri, with an hour for lunch.*

If the roster is not confirmed yet, ensure Payroll is notified as soon as the roster pattern has been agreed as this will affect future leave bookings. If no roster pattern is provided for staff with less than 1 FTE, the hours will be split equally over Monday to Friday (please be aware of the implications this might have on payment of Public Holidays).

Changes can be made on the [Change of FTE/Hours and/or Roster Change form](#).

For any staff working:

- Part-time - add details of weekly roster.
- Variable hours - add minimum and maximum hours per week as required by NZ employment law.

For Academic staff working:

- Non-standard hours of work – add details of hours if needed.

For Professional staff:

- Full-time - non-standard roster details
- Remember to take into account unpaid break requirements. E.g., Employees working over 4 hours, must have 30-minute unpaid meal break. See [Rest and meal breaks \(Employment New Zealand\)](#).

Example 1: 15 hours per week - 8.30am to 5.00pm, Tuesday and Wednesday with one-hour lunch each day

Example 2: 18.5 hours per week - Tuesday: 8.30am to 2.30pm with 30-min lunch break,

Wednesday: 8.30am to 4.30pm with 30-min lunch break and

Friday: 8.30am to 2.30pm with 30-min lunch break.

Semester Time or Academic Year Only

This is a drop-down list, and you can select from 'Semester Time Only' or 'Academic Year Only'. If it is a standard appointment, leave the field blank.

Examples of appointments that would be relevant here are Campus Watch staff who work Feb – Nov (Academic Year Only) and Dental Assistants who only work during the semesters (Semester Time Only).

Salary Level (Classification)	<p>Select the appropriate salary level for this position from the drop-down list. This should match the requisition unless the position was still being evaluated or the position was advertised without a salary level in the requisition.</p> <p><i>For professional staff, there are two main pay scales to select from, 37.5hrs and 40hrs, as well as specific salary levels by role.</i></p> <p><i>The main, non-specific codes to look for are:</i></p> <ul style="list-style-type: none"> • L1-8 = 37.5hr pay scale. • 40L1-8 = 40hr pay scale. <p><i>See Pay Scales for more.</i></p>
Salary Step	<p>Enter the step based on the salary scale being offered to the preferred candidate.</p> <p><i>Note: This field needs a leading 0 if less than 10 (e.g., 06).</i></p> <p><i>Be careful to select a salary step that is in line with the Remuneration Policy (refer Section 5 – Placement of staff members on a pay scale and progression within a pay scale)</i></p> <p><i>If it is outside policy, this should be discussed with your HR Advisor, Senior HR Advisor or Divisional Human Resource Manager prior to submitting the Offer Grid.</i></p>
Annual Full-time Equivalent Salary	<p>Refer to the appropriate salary table and enter the salary commensurate with the previously entered Level and Step. This needs to be the actual dollar amount.</p> <p><i>You can find the current salary scales here – Pay scales.</i></p>
Pro-rata Salary	<p>If the appointment is not full-time, calculate and enter the pro-rata salary here.</p> <p><i>Calculate by multiplying the annual FTE salary (above) by the FTE ratio. For Academic staff the FTE is in the “FTE Academic” field.</i></p> <p><i>Example 1 (Academic staff member that works 0.75 FTE):</i></p> <p>$\\$50,000 \times 0.75 = \underline{\\$37,500}$</p> <p><i>For professional staff the FTE will be the “Hours Per Week” divided by the “Standard Hours per Week”.</i></p> <p><i>Example 2 (Professional staff member that works 30 hours per week):</i></p> <p>$30 / 37.5 = 0.8$ (the FTE is 0.8).</p> <p>$\\$50,000 \times 0.8 = \underline{\\$40,000}$</p>
Hourly Rate/Agreed Fee	<p>Enter hourly rate/agreed fee if applicable.</p>
Currency	<p>This defaults to New Zealand (NZD).</p>

Student Status

Select if applicable.

Student status will affect the employment agreement offered.

Employment
Agreement

Select the appropriate Employment Agreement.

This field has a filter automatically set, based on the job family selected in the requisition. However, if you are not seeing the correct agreement type, you can fix this by clicking on 'clear filter' and the full list will appear in the drop-down.

See [Employment Agreements](#) for more information.

Details

Account Number (GL/PL)	<p>If the salary is to be paid from a single account, fill the details in the Account 1 area, and set the percentage at 100. If the salary is to be paid from several accounts, use Account 2 and Account 3 as needed.</p> <p>In instances where the salary is to be paid from more than three accounts, just enter 1 account code for the full 100% and note the full account code breakdowns, including percentages, in the Additional Details field.</p> <p>If the salary is to be paid from a new account that has not been set up, please:</p> <ol style="list-style-type: none">1. Enter the Department's main salary account2. Advise Payroll of the correct account code once it is active. <p><i>The format of the account code is important. It must be entered without spaces, dots or dashes and must be the full account code (15 characters for GL and 19 characters for PL). e.g., GL10ABC01211100.</i></p> <p><i>Academic staff salaries end in dissection code: 211100</i></p> <p><i>Professional staff salaries end in dissection code: 221100</i></p> <p><i>For more on the University's account codes, see the Chart of Accounts or contact your Finance Associate or Finance Manager.</i></p>
Salary Percentage	<p>The first salary percentage field defaults to 100. Leave this if only one account is being entered. If multiple accounts are being listed these must add up to 100%.</p> <p><i>If the position is part-time, for example 0.4 FTE, the percentage still needs to add to 100%, not 40%.</i></p>
Specific Relocation Text for Offer Letter (lump sum)	<p>If the lump sum option is selected and there are restrictions on what the relocation amount can be used for, enter details here (e.g., flights only).</p>
Relocation Lump Sum Maximum Amount	<p>If a lump sum Relocation amount has been approved, enter the amount here.</p> <p>See Relocation Policy here.</p>
Relocation?	<p>Choose from 'Full Policy/Lump Sum/No'.</p>
Establishment Grant Fields	<p>If an establishment grant has been approved, enter the annual value and the number of years granted.</p>

Allowance fields

These fields are not often used, maybe only 5-10% of the time. They may be used for an Recruitment and Retention (R&R) allowance or a tools allowance or vocational (medical/dental) allowance to name a couple. These fields do feed through to payroll, so if you are listing an allowance make sure each field is completed; type, amount, start and end date.

For more information regarding Recruitment and Retention Allowances, including the specific approvals required for academic and Professional staff, see the [Recruitment and Retention Remuneration Policy](#). If an R&R is selected, you must attach proof of approval from your Divisional approver/s.

Note: If the allowance is ongoing (e.g., a vocational allowance for a permanent position) the end date should be 31 Dec 2049. This is the current end date for permanent staff in the HR system.

Additional details

Include any information that may be useful for HR in completing the Letter of Offer.

For example, for the period 01/10/20-31/01/21 will be 0.5 FTE, from 01/02/21 to end of the fixed term will be 1.0 FTE.

Ready for HR (Yes/No)

Enter 'yes' here when you have completed the Offer Grid.

Letter used

Do not use this field. Once HR has created the offer letter, this field will populate with the offer template used.

Commencement types

Taleo Descriptions	Definition
Term as HOD or secondment offered to current staff member.	<p>Current staff member with concurrent appointment, where the staff member will return to their substantive role on the completion of this appointment</p> <p>Use for concurrent appointments (e.g., HOD or Secondments)</p>
Current staff member transferring from another position	<p>Current staff member with reappointment on existing job.</p> <p>or</p> <p>Where they are transferring completely from one role in the university to another role.</p> <p>Use for reappointments and transfers</p>
New staff member	<p>New employee.</p> <p>Use for staff new to the University</p>
Ex-staff member returning to the university	<p>Ex-Staff member returning to the university with a new job.</p> <p>Use in the scenario where an employee has left the University and is returning with a new job</p>
Additional position offered to a current staff member	<p>Current staff member being offered an additional job.</p> <p>Use in the scenario where an employee has a current part time job, but also requires an additional part time job (they will be holding two distinctly separate jobs)</p>

FTE – Hours conversions (37.5 hr work week)

Hours	FTE
3	0.0800
3.5	0.0933
4	0.1067
4.5	0.1200
5	0.1333
5.5	0.1467
6	0.1600
6.5	0.1733
7	0.1867
7.5	0.2000
8	0.2133
8.5	0.2267
9	0.2400
9.5	0.2533
10	0.2667
10.5	0.2800
11	0.2933
11.5	0.3067
12	0.3200
12.5	0.3333
13	0.3467
13.5	0.3600
14	0.3733
14.5	0.3867

Hours	FTE
15	0.4000
15.5	0.4133
16	0.4267
16.5	0.4400
17	0.4533
17.5	0.4667
18	0.4800
18.5	0.4933
18.75	0.5000
19	0.5067
19.5	0.5200
20	0.5333
20.5	0.5467
21	0.5600
21.5	0.5733
22	0.5867
22.5	0.6000
23	0.6133
23.5	0.6267
24	0.6400
24.5	0.6533
25	0.6667
25.5	0.6800
26	0.6933

Hours	FTE
26.25	0.7000
26.5	0.7067
27	0.7200
27.5	0.7333
28	0.7467
28.5	0.7600
29	0.7733
29.5	0.7867
30	0.8000
30.5	0.8133
31	0.8267
31.5	0.8400
32	0.8533
32.5	0.8667
33	0.8800
33.5	0.8933
34	0.9067
34.5	0.9200
35	0.9333
35.5	0.9467
36	0.9600
36.5	0.9733
37	0.9867
37.5	1.000