

Online Recruiting: Direct to Offer Fact Sheet

What is Direct to Offer?

Direct to offer is essentially an unadvertised position. The process is very similar to the advertised position process but with some notable differences.

Differences in the Requisition

This sheet assumes you already understand the process for completing a requisition for an advertised vacancy. If you do not, please refer to the Requisition Fact Sheet and the online recruiting Reference Guide for assistance.

The screenshot shows the 'New Requisition' form with the following sections and annotations:

- 1. Structure Information**
 - Structure: No change
- 2. Vacancy Management Information**
 - Owners / Position Details: Select the Direct to Offer candidate selection workflow (*important - this removes the vacancy from the advertising workflow and simplifies the process*)
- 3. Remuneration and Budget Information**
 - Nature of Employment / Remuneration and Budget: Permanent or fixed term positions of greater than 12 months will require a business case added as an attachment (*refer to next section*).
- 4. Sourcing/Advertising Information**
 - External Description / Internal Description: Choose appoint without advertising, add the appointees name and add the approved text from the Managers' Toolkit on the HR website.
- 5. Credentials**
 - Credentials / Prescreening: No change

About the Business Case

Positions with a term of more than 12 months must be advertised. In exceptional circumstances (such as where the candidate is named on a successful research grant application) you can request this be waived.

To do so, prepare a memo summarising the case and attach it to the requisition.

- If the Direct to Offer appointment is for a fixed term of more than 12 months, approval from the HR Services Manager is required.
- If the Direct to Offer appointment is permanent, approval from the Director of Human Resources is required.

The HR Administrator will seek this further approval for you once the Offer Grid has been approved.

Accessing the Approved Ad Text

When completing the requisition you will be asked for advertising wording. Candidates will see this wording under the 'Description' area for the vacancy advertisement.

Insert the following advertisement wording in both the External and Internal sections, regardless of the status of your preferred candidate:

"You are invited to apply for this position. Please click on the below 'Apply Online' button and you will be taken through a short application process. You will need to attach a current curriculum vitae and if relevant, please also attach a copy of your current work visa."

Copy Advertisement Text

There is a link just below the Draft External text box on the requisition page or go to:

<http://www.otago.ac.nz/humanresources/managers/recruitment/direct-to-offer.php>

Remember: You must paste the Advertisement Text in both the Internal and External sections, regardless of your candidate's status.

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Attachments

Please add the Job Description or Information Statement for the position, as well as the candidate's CV. For full time or fixed term positions greater than 12 months you should also attach a memo outlining the reasons behind the appointment.

Approvals

There are currently two possible paths for requisition approval for direct to offer vacancies. Some divisions require a full approval at this stage, while within other divisions the hiring manager approves the requisition themselves. Keep in mind that this variation in process is only at the requisition level. The offer stage always requires full approval.

For information on how your division is approaching this, contact your divisional manager or departmental administrator for specific advice.

You can also contact your HR Administrator with any questions.

Full Approval

1. Create a requisition completing all details mandatory for approval and adding all required attachments
2. From the More Actions menu select Request Approval
3. Adjust your approval chain if required (*remember to add your approvers as collaborators as well*)
4. Click Done

NOTE: You will not be able to post this position to the website until final approval has been obtained.

Self Approval

1. Create a requisition completing all details mandatory for approval and adding all required attachments
2. From the More Actions menu select Save as Open
3. Add a comment if required
4. Click Done

NOTE: The requisition will be marked as Approved and you can post this position to the website straight away (*refer to next section*).

Post Online

To continue the process you must post the position online. Please note, this position will not be publicly visible. You will next provide the selected candidate(s) a link to apply.

1. After approval, open the requisition and select the Posting & Sourcing tab
2. Click the Select/Update button in the University of Otago Websites section
3. Confirm the default settings (a tick next to Direct to Offer External and Direct to Offer Internal)
4. The end date is set to 5 days (i.e. the posting will be available online for 5 days). Adjust this if necessary
5. Click Done

Notify the Candidate

There is a simple online form available to help you email the candidate(s) a direct link to the vacancy. **NOTE:** The email sent assumes you have spoken to the candidate(s) prior to sending this email.

Candidate Name:	<input type="text"/>
Email Address:	<input type="text"/>
Requisition Number:	<input type="text"/>
	<input type="button" value="Send Email"/>

1. Access the Direct to Offer page in the online Manager's Toolkit and locate the Contacting the Preferred Candidate section. (*see address over*)
2. Enter the Candidate Name, Candidate Email Address and Requisition Number into the online form.
3. Click Send Email

NOTE: There are instructions within the page on sending the email to more than one candidate if there are multiple positions.

Checking Status / Completing Offer Details

Logon to the online system to check if the candidate has applied. Once this is done, the Direct to Offer workflow will move the candidate directly to the Offer to be Made status. Complete the Offer Grid, seeking appropriate approvals, as per the normal process.

See [OVER](#)