

# Online Recruiting: Offer Grid Fact Sheet

## Permanent and Fixed-term (Academic and General Staff)

### CONTEXT

## The recruiting process...

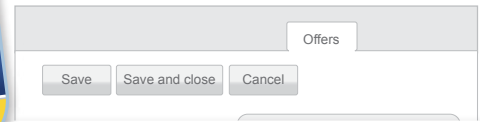
You have gone through steps 1 to 6 (right) and you have found the best candidate for the position. Now you would like to make a formal offer.



Notice that steps 5 to 8 of the recruiting process above are a condensed view of the candidate selection workflow (CSW). This fact sheet will focus on Offer Management (7) and more specifically, how to complete the Tab within the online recruiting system known as the Offer Grid.

## The offer process...

- 1 Offer Grid**  
 You complete the Offer Grid within the online recruiting system
- 2 Offer Approval**  
 The Offer Grid is sent for appropriate approval
- 3 Offer Letter**  
 HR reviews the Offer Grid and creates the Offer Letter
- 4 Offer Sent**  
 The Offer Letter is sent to the candidate
- 5 Response Captured**  
 Once the candidate responds, HR updates the online recruiting system accordingly and the workflow proceeds.

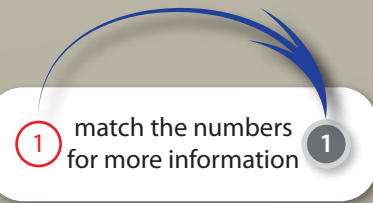


### Info you will need

- ~ The position title - as it should appear on the Letter of offer
- ~ The primary location
- ~ If it is a confirmation path position
- ~ Who the position reports to
- ~ 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
- ~ The desired start date
- ~ If fixed term, the desired end date
- ~ Position type (full-time, part-time, etc.)
- ~ Hours per week (or % of FTE for academic)
- ~ Schedule details if not standard (e.g. 8:30 - 2 Monday to Thursday)
- ~ Student status (are they enrolled)
- ~ Employment agreement (HR will complete this 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.)

# Symbol Key

Use the numbering scheme to match fields to additional information. The icons will help you understand more about the type of entry and the impact of that entry on the process.



## Fields

**Ma** Mandatory to save (also indicated by \*).

**Re** Required (if applicable) for Offer Letter and HR Information System.

**Op** Optional (not required but may help HR complete the Offer).

## Entry type

Free-text entry. Please note: you can enter more text than will be visible within the entry field.

Numeric entry. Please enter numbers only (e.g. enter 50000 do **not** enter \$50,000).

Look-up field. Many of these are codes or exact responses needed. Date fields also have a look-up feature.

## Impact

This information is used directly in the letter of offer.

This information will be updated to the HR Information System which drives payroll and leave.

This information is used to help drive other processes.

# System Tips

## Adding additional details

There is a field on the offer grid where you can add additional details, but entry is limited. If you would like to add a lot of additional details you can:

1. Add the text, 'see candidate comments dated dd/mm' to the additional details field
2. Save and close the offer grid
3. Enter extended comments by clicking the 'add comments' icon in the top menu

## Involving another staff member

Once you reach the offer stage you will no longer have access to the 'Request Contribution' functionality. If you need input from someone do the following:

1. Complete the mandatory fields on the offer grid and save it.
2. Ensure the contributor is listed on the requisition as an owner (if they will need to edit the offer) or a collaborator (if they only need to review the offer).
3. Send the contributor an email using Outlook (or your usual email program). Outline the contribution you would like from them.
4. They log in and add the necessary information.

# Top Section

The Offer Grid is in four sections:  
**Top Section, General Terms, Bonuses & Details**

1 Offers can have these statuses:

- » Draft
- » Pending Approval
- » Approved
- » Extended

*NB: The offer is date stamped when Approved and Extended.*

2 Enter the position title as it should appear in the Letter of Offer.

*NB: For academic offers, the position title should normally be standard (e.g. 'Lecturer' not 'Lecturer in specialty')*

3 Choose from a list of standardised Position Titles.

The screenshot shows the 'Offer (New)' form with the following fields and callouts:

- 1: Status (Draft, Approved, Extended)
- 2: Position Title
- 3: Position Title (Standard Academic)
- 4: Primary Location
- 5: Reports To Name
- 6: Created on (06/Sep/2010)
- 7: Expiration Date (27/Sep/2010)

Other visible fields include Confirmation Path, Reports To Position Title, and Confirmation Path (with a 'Re' icon).

4 Choose from a list of Locations.

5 Enter the name and position of the new employees direct Manager/Supervisor.

6 The offer is date stamped when you first save.

7 HR will amend the date when extending the offer.  
*NB: Normally 2 weeks from the date of the offer letter*

# General Terms

**8** Choose from a list.  
(e.g. create a new staff record or move an existing staff member to either a new/additional position)

**9** Enter Department and Position information for those currently employed at the University.  
NB: Used for data quality control

**10** Choose the desired start date  
NB: Leave this blank if it is to be agreed at a later date

**11** Leave this ticked if possible.

**12** Complete only if the position is fixed-term.

**13** Select the appropriate radio button.  
NB: To save, you must change this from the default, 'Not specified'

The screenshot shows the 'General Terms' form with the following fields and callouts:

- 8**: Commencement Type
- 9**: Details of Current Position
- 10**: Commencement Date
- 11**: Tentative checkbox
- 12**: Fixed-term End Date
- 13**: Full-time/Part-time/Variable (timesheet) radio buttons
- 14**: Academic FTE (0 - 1)
- 15**: Days and Hours of Work (if not standard)
- 16**: Semester Time Only checkbox
- 22**: Student Status radio buttons
- 23**: Employment Agreement

A yellow callout box points to the Salary Level section with the text: "see SALARY section below".

**A Small difference for General staff**

Hours Per Week  
Standard Hours Per Week

Not Specified  
 37.5  
 40

Enter the actual hours to be worked per week in the top box and then specify the number of hours considered full-time for that position.

**15** Enter details if required.  
(e.g. : 8.30 am to 5.00 pm, Tues and Wed with one hour lunch each day or Tuesday, 8.30 am to 2.30 pm, Wednesday, 8.30 am to 4.30 pm, and Friday, 8.30 am to 2.30 pm)

**16** Tick if applicable

**22** Select if applicable  
NB: Student status affects the employment agreement offered.

**23** Choose the applicable agreement.  
NB: If you are unsure, leave it blank and HR will complete upon review.

**14** Enter as 1 for full-time or an appropriate decimal.  
(e.g. 0.5, 0.75 or 1)

## Filling out the salary section...

The salary section of the Offer Grid comprises five entry fields. The first, Salary Level (A), is mandatory. Additional fields are required as indicated below. For more information, please refer to the remuneration policy and the salary scales on the HR website. For advice on which step is appropriate, please contact your Divisional HR Manager or Advisor.

|   | Full Time               | Part Time               | Variable (hourly)       |
|---|-------------------------|-------------------------|-------------------------|
| Salary Level with Steps                         | Fields Required A, B, C | Fields Required A, B, D | Fields Required A, B, E |
| Salary Level without Steps (or on agreed rates) | Fields Required A, C    | Fields Required A, C, D | Fields Required A, E    |

**17** Salary Level: Choose the appropriate level for the position.

**18** Step: (if applicable) Enter the Step based on the salary scale being offered to the preferred candidate.  
NB: This field needs a leading 0 if less than 10 (e.g. 06)

The screenshot shows the salary section of the form with the following fields and callouts:

- 17**: Salary Level (Classification)
- 18**: Step (e.g. 06)
- 19**: Annual Full-time Equivalent Salary
- 20**: Pro-rata Salary
- 21**: Hourly Rate/Agreed Fee

**19** Annual FTE Salary: (if applicable) Refer to the appropriate Salary Table and enter the salary commensurate with the previously entered Level and Step.

**20** Pro-rata Salary: (if applicable) Calculate by multiplying the annual FTE Salary by the FTE ratio above.  
(e.g. \$50000 x 0.75=37500)

**21** Hourly Rate/Agreed Fee: (if applicable) enter amount.

# Bonuses (Unused Section)



Though this section appears in the offer grid, it is not currently used. Please continue to the detail section.

If there are no applicable allowances will only need to complete numbers 24 and 32 of this section .

All fields: (unless otherwise indicated)

## Details

24

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.

In instances where the salary is to be paid from more than three accounts, please note details in the Additional Details field below.

If the salary is to be paid from a new account that has not been set up, please:

1. Enter the Department's main salary account
2. Make note in the Additional Details field
3. Advise HR of the correct account code before the start date

25

If a lump sum Relocation amount has been approved, enter the amount here.

26

Choose from 'Full Policy / Lump Sum / No'

27

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)

Details

|      |  |  |  |  |
|------|--|--|--|--|
| 24 * | Account Number GL/PL (1)                             |  |  |  |
| 24 * | Salary Percentage (Account 1)                        |  |  |  |
|      | Account Number GL/PL (2)                             |  |  |  |
|      | Salary Percentage (Account 2)                        |  |  |  |
|      | Account Number GL/PL (3)                             |  |  |  |
|      | Salary Percentage (Account 3)                        |  |  |  |
| 25   | Relocation Lump Sum Maximum Amount                   |  |  |  |
| 26   | Relocation?  |  |  |  |
| 27   | Specific Relocation Text for Offer Letter (lump Sum) |  |  |  |
| 28   | Establishment Grant Annual Value                     |  |  |  |
|      | Establishment Grant Years                            |  |  |  |
| 29   | R&R Allowance Type                                   |  |  |  |
|      | R&R Allowance Annual Value or Percentage             |  |  |  |
|      | R&R Allowance Start Date                             |  |  |  |
|      | R&R Allowance End Date                               |  |  |  |
| 30   | Admin Allowance Type                                 |  |  |  |
|      | Admin Allowance Annual Value or Percentage           |  |  |  |
|      | Admin Allowance Start Date                           |  |  |  |
|      | Admin Allowance End Date                             |  |  |  |
| 31   | Allowance Type (1)                                   |  |  |  |
|      | Allowance Annual Value or Percentage (1)             |  |  |  |
|      | Allowance Start Date (1)                             |  |  |  |
|      | Allowance End Date (1)                               |  |  |  |
|      | Allowance Type (2)                                   |  |  |  |
|      | Allowance Annual Value or Percentage (2)             |  |  |  |
|      | Allowance Start Date (2)                             |  |  |  |
|      | Allowance End Date (2)                               |  |  |  |
|      | Additional Details                                   |  |  |  |
| 32 * | Ready for HR (Yes/No)                                |  |  |  |
| 33   | Letter Used  |  |  |  |

Create...  
**DO NOT USE**

28

If an establishment grant has been approved, enter the annual value and the number of years granted.

29

If a recruitment and retention allowance has been approved, or if the staff member is eligible for other specific allowances, complete the appropriate section (29 or 31).

Enter either:

» the annual dollar value (e.g. 1000)

or

» the percentage of annual salary (e.g. 10)

Also add the start date and, if applicable, the end date for the allowance.

HR will complete the Allowance Type field when reviewing the offer but you are welcome to select the type if you know it.

*NB: For R&R allowances attach a scanned copy of the approval document to the requisition or email [rrs.info@otago.ac.nz](mailto:rrs.info@otago.ac.nz) with questions*

32

When you have completed the offer details to your satisfaction enter 'Yes' in this field.

33

**Do not use.**

Once HR has created the offer letter, this field will populate with the offer template used.

30

If an administration allowance has been approved, select the appropriate option from:

1. Administrative Supplement (Paid Pro-rata by FTE)
2. Administrative Supplement (Actual Amount Paid, not varied by FTE)

In most cases, these allowances are pro-rata. If the staff member increases or decreases their working hours in that position, the allowance will increase or decrease accordingly.

If **option 1** is selected, enter the full time equivalent annual dollar value (e.g. 1000). HR will enter the pro-rata amount in the offer letter.

If **option 2** is selected, enter the actual annual dollar value (e.g. 1000). HR will enter the actual amount in the offer letter.