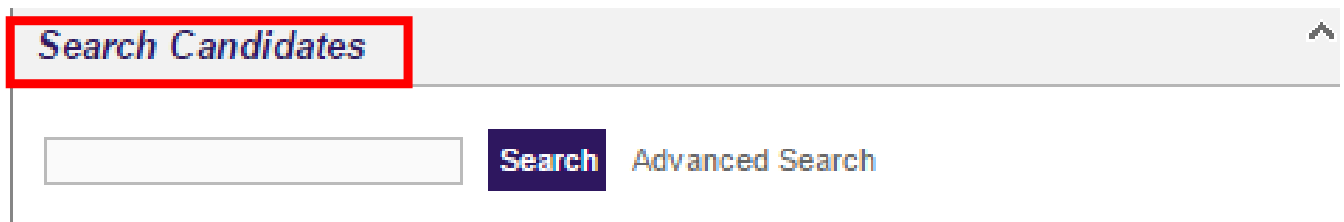


Offers

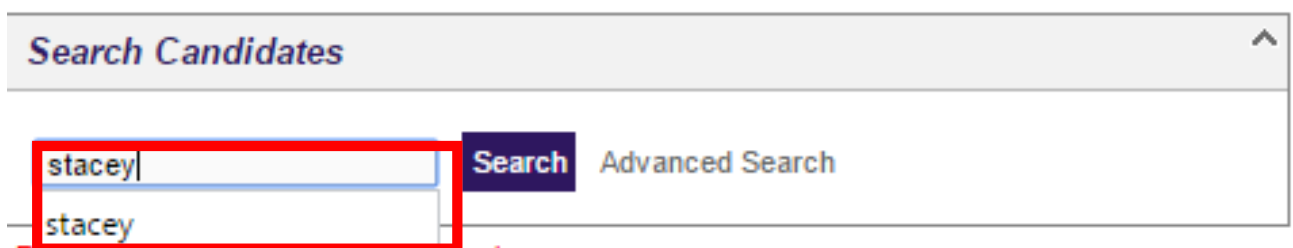
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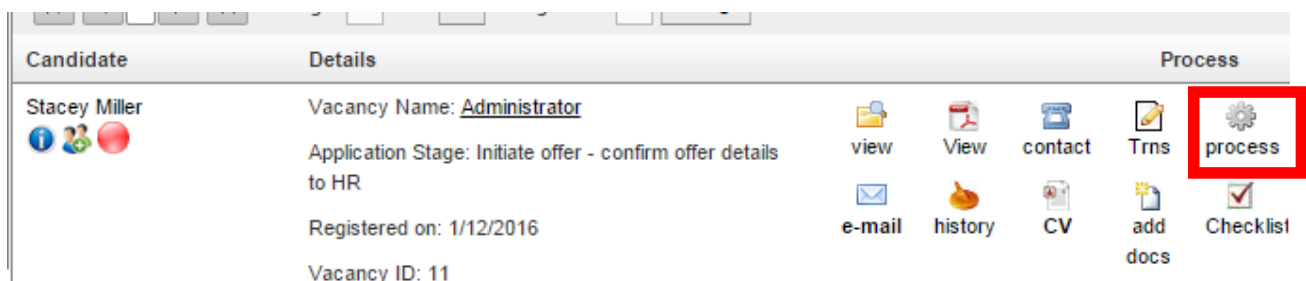
1. If you have a candidate who you would like to appoint, you will need to progress them to the offer stage through the system. First, search for the candidate by clicking the **'Home'** tab and finding the **'Search Candidates'** field.














2. Enter the candidate's name and click the purple **'search'** button. In this example we are looking for **Stacey Miller**.

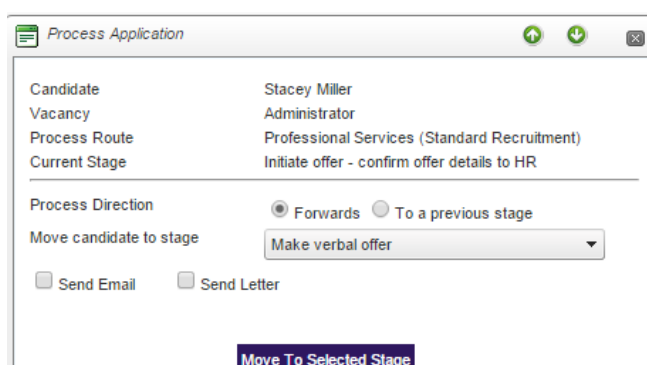


3. The candidate's name will appear in the screen. Click on **'process'** icon.



Candidate	Details	Process
Stacey Miller 	Vacancy Name: Administrator Application Stage: Initiate offer - confirm offer details to HR Registered on: 1/12/2016 Vacancy ID: 11	 view  View  contact  Trns  process  e-mail  history  CV  add docs  Checklist

4. The **'Process Application'** window will open.



Candidate	Stacey Miller
Vacancy	Administrator
Process Route	Professional Services (Standard Recruitment)
Current Stage	Initiate offer - confirm offer details to HR

Process Direction: ☒ Forwards ☐ To a previous stage

Move candidate to stage: Make verbal offer

☐ Send Email ☐ Send Letter

Move To Selected Stage

5. Click the '**Move candidate to stage**' drop down and change the status to '**Make Verbal Offer**'
6. Click the purple '**Move to Selected Stage**'. Close the window and you will go back to the candidate screen, showing the candidate's name

Process Application

Candidate: Stacey Miller
 Vacancy: Administrator
 Process Route: Professional Services (Standard Recruitment)
 Current Stage: Initiate offer - confirm offer details to HR

Process Direction: ☒ Forwards ☐ To a previous stage

Move candidate to stage: Make verbal offer

☐ Send Email ☐ Send Letter

Move To Selected Stage

7. At this point you are likely to want to speak to the candidate to make the offer. To find the contact details click the '**contact**' icon (a **blue telephone**).

Stacey Miller

Vacancy Name: Administrator
 Application Stage: Make verbal offer
 Registered on: 12/01/2016
 Vacancy ID: 11












view View **contact**
 e-mail history CV

8. A pop-up window will appear to show you the candidate's telephone number and email address.

Candidate Contact Information

First name: Stacey
Surname: Miller
Address Line 1: 20 Third Avenue
Address Line 2:
Address Line 3:
Address Line 4: Dagenham
Postcode: Essex
Preferred contact number: 010292
E-mail address: Stacey@test.com
Title: Mrs
Preferred contact number type: Mobile phone No

9. Close the pop-up window when you have made a note of the information you need.
10. After the conversation, hopefully your candidate has decided to accept the offer. Find your candidate in the system as before and click the '**process**' icon.

Stacey Miller 	Vacancy Name: Administrator Application Stage: Verbal offer accepted - initiate second fundcheck Registered on: 1/12/2016 Vacancy ID: 11	 view  e-mail	 View  history	 contact  CV	 Trns  add docs	 process  Checkli
--	---	--	---	---	--	---

11. In the pop-up window select '**Verbal Offer Accepted – Initiate Second Fund Check**'

Process Application

Candidate: Stacey Miller
 Vacancy: Administrator
 Process Route: Professional Services (Standard Recruitment)
 Current Stage: Make verbal offer

Process Direction: ☒ Forwards ☐ To a previous stage

Move candidate to stage: Offer withdrawn

☐ Send Email ☐ Send Letter

Move to Selected Stage

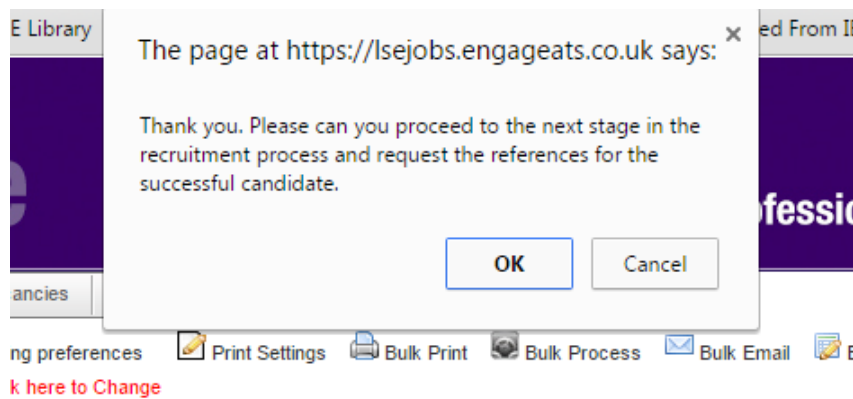
☐ Remove from candidate search results

☐ Close process window after processing

12. Click the purple 'Move to Selected Stage' button

Important Note: If the candidate has declined the verbal offer or has withdrawn their application, please select the appropriate item from the drop-down list.

13. Click 'OK' to confirm.



Go Page size: 1 Change

Process Application

Candidate	Stacey Miller
Vacancy	Administrator
Process Route	Professional Services (Standard Recruitment)
Current Stage	Make verbal offer

Process Direction ☒ Forwards ☐ To a previous stage

Move candidate to stage Verbal offer accepted - initiate second fundc ▼

☐ Send Email ☐ Send Letter

Move To Selected Stage

☐ Remove from candidate search results ?

☐ Close process window after processing

14. You should now initiate the Second Fund Check process through the system.

Second Fund Check

- Click the **'Approval Request'** tab at the top of the screen and click **'Request to Recruit'** on the drop down menu.

The screenshot shows the top navigation bar with tabs: Home, Panel Home, My Settings, Vacancies, **Approval Request**, Interviews, and FAQs. Below the 'Approval Request' tab, a dropdown menu is open, and the 'Request To Recruit' option is highlighted with a red box. Other options in the dropdown include 'Window tiling preferences', 'Print', 'Bulk Process', 'Bulk Email', 'Bulk References', and 'Export all scores, recs, etc.'. Below the navigation bar, there is a search results section for 'Candidate name/id like stacey'. The search results table shows one candidate, Stacey Miller, with details like 'Vacancy Name: Administrator', 'Application Stage: Verbal offer accepted - initiate second fundcheck', 'Registered on: 12/01/2016', and 'Vacancy ID: 11'. The table also includes a 'Process' column with various action icons like 'view', 'View', 'contact', 'Trns', 'process', 'rcmnd', 'appoints', 'note', 'e-mail', 'history', 'CV', 'add docs', 'Checklist', 'print', and 'Referenc'. The table is paginated to show 'Page: 1 of 1' and 'Page size: 1'.

- Click the purple **'New Request'** button.

The screenshot shows a purple button labeled 'New Request' with a red border. To the right of the button, there is a text prompt: 'Click to enter the relevant manager to approve your vacancy'. Below the button, there is a text prompt: 'Please click the "Start" button in the *Unstarted requests* column below to submit your unstarted appri'. Below the text prompt, there is a table with the following columns: 'Unstarted requests', 'ID', 'Workflow Name', and 'Definition'. The table contains five rows of data:

Unstarted requests	ID	Workflow Name	Definition
	33077	Replacement New - KR	Professional Services - Replacement Post for like) - Single Budget
	33073	New - KR	Professional Services - New Post-Single B
	32979	UG Admissions Specialist - Jan 2016	Professional Services - Replacement Post for like) - Single Budget
	32977	Office Manager	Professional Services - Replacement Post for like) - Single Budget
	32924	test	Professional Services - New Post-Single B

At the bottom of the table, there is a purple button labeled 'Start' next to the row with ID 32907, Workflow Name 'Recruitment advisor', and Definition 'Professional Services - New Post-Single B'.

- Select the workflow that you require. In this example we are making an offer for a Professional Services vacancy and so we will select **'Professional Services'** in the drop down.

Please select any filters that you would like to use to help locate the appropriate approval workflow:

Job Type

Professional Services

Select Workflow

18. Click the purple **'Select Workflow'** button to proceed.

In the Workflow Definition field select the appropriate fund check workflow – either **'offer within 2 increments'** or **'offer above 2 increments'**, depending on the level of offer you wish to make. If you are unsure, please contact your HR Adviser.

Recruitment Authorisation Request


New Request Click to enter the relevant manager to approve your vacancy

Please click the "Start" button in the *Unstarted requests* column below to submit your unstarted approval requests.

Unstarted requests	ID	Workflow Name	Definition	Current step	Date Started	Stat
Start New Workflow						
Workflow summary information						
Workflow Definition:		Please choose				
Name for the new workflow:		Academic/Senior Research - Second Fund Check				
		LSE Fellow/Course Tutor - Second Fund Check				
		Named Researchers				
		Professional Services - New Post-Single Budget				
		Professional Services - Replacement Post (like for like) - Single Budget				
		Professional Services - Replacement Post (with changes) - Single Budget				
		Professional Services - Second Funds Check - Offer above 2 increments				
		Professional Services - Second Funds Check - Offer within 2 increments				
		Research Officer/Research Assistant - Second Fund Check				
		Single Nomination				

19. In this example we have selected **'offer above 2 increments'**. Complete the fields with your email address, your funders email address, your HR Adviser's email address and then select the HR Systems team email address. Click the purple **'Start workflow'** button at the bottom of the screen.


20. A **Vacancy Approval Form** will appear in a pop-up window.

 Vacancy Approval Form

Job Title *	<input type="text"/>
Area *	<input type="text" value="Please Select"/>
Sub -Area	<input type="text" value="Please Select"/>
Grade *	<input type="text" value="Please Select"/>
Step *	<input type="text" value="Please Select"/>
Salary *	<input type="text" value="Please Select"/>
Salary Range *	<input type="text" value="Please Select"/>
Is this a full-time post? *	<input type="radio"/> Yes <input type="radio"/> No
If part-time, please state hours of work each week	<input type="text"/>
Is this post fixed term? *	<input type="radio"/> Yes <input type="radio"/> No
If yes, please state the length of the fixed term appointment and the appointment end date	<input type="text"/>
The reason should be a legitimate reason for using a fixed term contract. Contact your HR Adviser	<input type="text" value="Please Select"/>
If yes, please state the reason	<input type="text"/>
Estimated start date of the post *	<input type="text"/> <input type="button" value="Calendar"/>
Please provide your business case for the offer you wish to make to the successful candidate	
Business Case *	<input type="text"/> <input type="button" value="Browse"/>
	<input type="button" value="Upload"/>

21. Enter the details of the offer that you would like to make.
22. In this example we are making an **offer above the normal 2 increments**. Therefore, we are asked to upload a business case to explain why you need to offer above the normal minimum.
23. If you are unsure how to write a business case for making an offer above 2 increments, please refer to the [Starting Salary Policy](#) for guidance, or speak to your HR Adviser.

24. Click the purple **'Save and Exit'** button if you want to come back to it later or click **'Submit'** if you want to proceed.

 Vacancy Approval Form

Salary Range * SB05: £27,934 - £32,333 ▼

Is this a full-time post? * ☒ Yes ☐ No


If part-time, please state hours of work each week

Is this post fixed term? * ☐ Yes ☒ No

If yes, please state the length of the fixed term appointment and the appointment end date

The reason should be a legitimate reason for using a fixed term contract. Contact your HR Adviser Please Select ▼


If yes, please state the reason

Estimated start date of the post * 01-03-2016 

Please provide your business case for the offer you wish to make to the successful candidate

Business Case *

Uploaded Documents

Document Name	Date	Delete
Business Case for Ad...	02/02/2016 16:32:07	

Proposed salary offer (above 2 increments) * £30,495

Save and exit

Submit

Print

You can save your data by clicking the Save button and come back to it later.

When you are happy with your form, click 'Submit'.

To download this form as a printable PDF file, click 'Print'.







































25. You will see this screen. The status of the second fund check is now **'Active'**. This will change to **'Completed'** when it is approved.

Recruitment Authorisation Request

New Request

Click to enter the relevant manager to approve your vacancy

Please click the "Start" button in the *Unstarted requests* column below to submit your unstarted approval requests.

Unstarted requests	ID	Workflow Name	Definition	Current step	Date Started	Status	
	33291	Administrator	Professional Services - Second Funds Check - Offer above 2 increments		2/2/2016 4:27:01 PM	Active	   
	33077	Replacement New - KR	Professional Services - Replacement Post (like for like) - Single Budget	Email(s) to confirm approval by HR	1/28/2016 2:28:14 PM	Completed	  
	33073	New - KR	Professional Services - New Post-Single Budget	Email(s) to confirm approval by HR	1/28/2016 2:14:34 PM	Completed	  
	32979	UG Admissions Specialist - Jan 2016	Professional Services - Replacement Post (like for like) - Single Budget	Email sent to Funding for approval	1/27/2016 10:29:42 AM	Active	   
	32977	Office Manager	Professional Services - Replacement Post (like for like) - Single Budget	Email sent to Funding for approval	1/27/2016 10:29:39 AM	Active	   
	32924	test	Professional Services - New Post-Single Budget	Email sent to Funding for approval	1/26/2016 1:34:57 PM	Active	   
Start	32907	Recruitment advisor	Professional Services - New Post-Single Budget		1/26/2016 1:29:36 PM	Unstarted	   
	32906	Media and Communications Administrator	Professional Services - New Post-Single Budget	Email sent to Funding for approval	1/26/2016 1:29:35 PM	Active	   
	32873	MSc Administrator	Professional Services - New Post-Single Budget	Email sent to Funding for approval	1/26/2016 10:04:02 AM	Active	   
Start	32829	Research and Communications Administrator	Professional Services - New Post-Single Budget		1/25/2016 2:36:15 PM	Unstarted	   

26. You should now complete the **'Offer Checklist'** in order to confirm to HR the details that you would like include in the contract.

Completing the Offer Checklist

1. Go to the **'Home'** tab and find the **'Search Candidates'** field.

Search Candidates

[Advanced Search](#)

2. Enter the candidate's name and click the purple **'search'** button.

Search Candidates

[Advanced Search](#)

3. The candidate's name will appear in the screen. Click the '**Checklist**' icon.

The screenshot shows a web application interface for searching candidates. On the left is a vertical sidebar labeled 'Search Candidates'. The main area displays details for a candidate named 'Stacey Miller'. The details are organized into columns: 'Candidate' (with a profile icon), 'Details' (with text like 'Vacancy Name: Administrator', 'Application Stage: Verbal offer accepted - initiate second fundcheck', 'Registered on: 1/12/2016', and 'Vacancy ID: 11'), 'Process' (with icons for view, View, contact, Trns, process, rcmd, appoints, note, e-mail, history, CV, add docs, Checklist, print, and Referenc), and 'Select' (with a red box around a small square icon). At the top and bottom of the main area are pagination controls showing 'Page: 1 of 1' and 'Page size: 1'.

4. A pop-up window will appear called '**Candidate Documentation**'

The screenshot shows a pop-up window titled 'Candidate Documentation'. It has a header bar with a green icon, the title, and two green arrows. The main content area shows 'Candidate Stacey Miller' and a 'Print:' button. Below this is a list of three items, each with a dropdown arrow: 'Offer Checklist', 'Candidate Checklist', and 'Hourly Offer Checklist'.

5. Click on the arrow to the right of the '**Offer Checklist**' to open it.

This screenshot is identical to the previous one, but the 'Offer Checklist' item in the list is highlighted with a red rectangular box, indicating it is the selected item.

6. Enter the details of the offer in the fields, similar to the example below.

Candidate Documentation	
Job Title	Administrator
Area	Anthropology
Sub Area (if applicable)	Please Select
Place of Work	Houghton Street London
Grade	SB05
Step	21
Salary	£30,495
Hours per week	35 35 hours per week is our FT hours
FTE	1 If 35 hours, FTE of 1
Salary	
Start Date	01-03-2016
End Date (if applicable)	
If Fixed Term, reason	Please Select
Manager Name	Rachel Hope
Manager Job Title	Department Manager

Important Note: Please ensure that you complete all sections related to the type of the job that you are offering as this information will be merged from this checklist into the offer letter.

7. If the post is part-time, please complete the '**Working Pattern**' field stating how many hours the candidate is working and the days per week that they work.
8. Please state the review period. If the person is an internal candidate and has already successfully completed a review period, select '**Internal (informal only)**'.
9. Check that you have completed all sections correctly.
10. Scroll to the end of the '**Offer Checklist**' and click the purple '**submit**' button.

Candidate Documentation

If Other please stipulate review period

Research Posts Only

Research Project Title

Research Funding body

PI for Project

Academic Posts Only

Salary Supplement

Interim Review ☐ Yes ☐ No

Interim Review Due Date

If No, please supply reason

Major Review Due Date

PGCert Required ☐ Yes ☐ No

Research Allowance

Relocation Allowance

Other Information

Submit

11. The '**Checklist**' icon will become bold to show that information has been completed.

Candidate		Details		Process								Select
Stacey Miller		Vacancy Name: Administrator										
		Application Stage: Make verbal offer										
		Registered on: 12/01/2016										
		Vacancy ID: 11										

