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| **Position Management to Hire** **Hiring Manager (HM) Checklist** | **Position Control to Hire Human Resources (HR) Checklist** |
| ☐Create or update position in JobBuilder (CATS until JB available) (<https://www.ucop.edu/local-human-resources/your-career/compensation/classification.html>)  ☐Concurrently, initiate request for new position (Position Management PerfectForms)  - Approvals by Supervisor, Director (State Director-if app) - Funding approval by Financial Control Point, RPM  ☐If Identified Candidate, complete Waiver of Recruitment form  ☐Submit request in Zendesk ([support@ucanrhelp.zendesk.com](mailto:support@ucanrhelp.zendesk.com)) to be assigned an analyst. Include JobBuilder/CATS PD or link to PD and completed Position Management PerfectForm.  (HR reviews, approves, enters PD in UCPath, adds position number to PerfectForms, moves PD from JobBuilder to TAMS, builds job opening in TAMS, posts job. Applicants apply. HR will sent spreadsheet.)  Review applicant materials and complete first section of spreadsheet  ☐Submit spreadsheet to same Zendesk ticket  (HR/Affirmative Action (AA) reviews applicants moves status to “Interview or Reject” (TAMS))  After HR approval, schedule and conduct interviews  Enter interview results into second section of spreadsheet  Submit spreadsheet to recruiter in Zendesk  (HR reviews evaluation template and moves status to “Offer, Hold or Reject” (TAMS); Prepare/Process Salary Analysis (PerfectForms) RPM/Leadership reviews and approves budget for salary analysis. AA reviews offer, approves final applicant (TAMS).  Perform reference checks. Let recruiter know they were successful.  (HR notifies HM of salary approval through Zendesk).  HM extends offer to applicant (verbal)  (Applicant accepts offer. Fingerprinting and background check initiated and cleared.)  Notify HR of agreed upon start date. (HR prepares Job Offer- letter created and sent through TAM. Pre-hire form attached. Candidate returns form for HR input to TAM (Prepare for Hire). New Hire processed by UC Path Center.  Next steps – Onboarding and I-9 Tracker.) | (HM initiate request for new position (PerfectForms) with funding, organizational, and programmatic approvals. Submits Waiver if I.C. and creates/updates position in JobBuilder/CATS.)  Recruiter receives request in Zendesk with attachments/links of completed PerfectForm(s) and JobBuilder/CATS PD  Recruiter reviews and classifies position  Ops Lead enters shell of position in UCPath, adds position number to PerfectForms  Recruiter builds job opening in TAMS, includes full PD from JobBuilder/CATS for posting  Recruiter Lead approves job posting  Recruiter posts job (Applicant(s) apply)  HR provides spreadsheet to HM  (HM Reviews applicant documents, completes first section of spreadsheet, returns to recruiter via Zendesk.)  Recruiter/AA reviews applicants moves status to “Interview or Reject” (TAMS)  (HM schedules and conduct interviews, enters interview results into second section of spreadsheet and submits to HR in Zendesk.)  Recruiter reviews evaluation template and moves status to “Offer, Hold or Reject” (TAM)  Recruiter prepares/process Salary Analysis (Leadership/RPM reviews and approves budget for salary analysis. AA reviews offer, approves final applicant (TAMS).  HR notifies HM of salary approval (Zendesk).  HM extends offer to applicant (verbal)  (Applicant accepts offer. Fingerprinting and background check initiated and cleared.  Prepare Job Offer in TAM. (Offer letter created and Pre-Hire form sent for candidate completion. Returns completed and signed to recruiter.)  Prepare for Hire (TAM) and submit. (UCPC processes New Hire.)  (Next steps – Onboarding and I-9 Tracker.) |