The Appointment Workflow- A Guide

Description: The Appointment workflow is used to process employee appointment actions. A WiTS appointment action can be initiated in one of three ways: From an unassigned job requisition action, from a Recruitment action, or from the creation of a standalone appointment action.

Typical users of this workflow: CSD Branches, DEU and DSSEM.

Adding Attachments: You can attach documents of the following type: Word, Excel, PowerPoint, PDF, JPEG, and emails to WiTS actions. There is no limit to the size of attached files in WiTS; however, it is recommended that the total size of all files combined be under 50MB (most attached documents tend to be less than 1MB). PII is allowed in WiTS attachments. For a complete list of allowable PII, see the WiTS FAQ page.

Action Details Tab

Action Details	Appointment	Approvals	Pay	Orientation	Final Processing

* Required Fields

WiTS #:	38830	Date Entered:	07/19/2018 08:47 AM
Action Type:	Appointment	Date Recv'd in HR*: (mm/dd/yyyy)	07/19/2018
AO's First Name*:		AO's Last Name*: *(NED Lookup)*	
AO's Email Address*:		Global Recruitment?*:	
		DSSEM?*:	No
Administrative Code*:		Institute/Center*:	
Organization Initials:		Proposed Effective Date*: (mm/dd/yyyy)	Calendar Payroll

Note: Dynamic fields will only appear based on what is selected in another field. For example, an 'Approval Number' field may only appear if the 'Approval Needed?' field is marked as 'Yes.'

- **WiTS#:** System-generated.
- **Date Entered:** System-generated.
- **Action Type:** System-generated.
- **Date Recv'd in HR:** Enter the date that the Classification request was received.
- **AO First Name, Last Name, Email address:** The NED Lookup feature may be used to fill in the information for the Administrative Officer or other IC contact if it is unknown. These fields are not mandatory for Classification Unit users when performing an Ad Hoc Classification.
- **Global Recruitment?** Select yes if this action is being handled by the CSD Global Recruitment Unit.
- **DSSEM?*:** Auto-selected as "No". Only select "Yes" if this is an Appointment being handled by DSSEM.
- **Administrative Code, Institute/Center, Organization Initials:** Enter the Admin Code associated with the action. The Institute/Center and Organization Initials will auto fill based on the admin code entered. These fields are not mandatory for Classification Unit users when performing an Ad Hoc Classification.

- **Proposed Effective Date:** Enter the Proposed Effective Date of the appointment. Update this date if the Proposed Effective Date changes during the appointment process.
- **CSD Branch Chief, CSD Team Leader, CSD HRS, CSD HR Assistant, Final Authorizer:** Select the appropriate participants.
- **Last Saved/Updated:** System-generated.
- **By:** System-generated.
- **Is the package complete?:** Indicate whether the initial appointment package submitted by the IC/Program is complete (you have all required documents/information needed to process the appointment). If the initial appointment package is not complete, select 'No.' Do NOT change this field when the IC/Program area submits a complete package. Once you select, 'No', leave this field as 'No.'
- **Date Missing Docs Email Sent:** System-generated.
- **List of Missing Docs/Info:** List whatever documentation or information is necessary.
- **Date Complete Package Received:** Indicate the date you received all of the required documentation to process the Appointment action. For Appointments related to a Recruitment action, enter the date the Selecting Official returned the hiring decision to HR. This is a required field before sending an action to the CSD DEU.
- **Priority:** Defaults to high. Change if applicable.
- **Action Status Code:** Select the code that is applicable.
- **Action Status:** Select the status that is applicable.
- **Action Status Description:** Select the appropriate status description.
- **Comments:** You may enter any comments related to the Appointment that are necessary. *Note: Comments entered in this field are displayed on the Status Report.*

Appointment Tab

Action Details	**Appointment**	Approvals	Pay	Orientation	Final Processing

* Required Fields
NIH Employee?*: ❓ [⌄]

Note: Dynamic fields will only appear based on what is selected in another field. For example, an 'Approval Number' field may only appear if the 'Approval Needed?' field is marked as 'Yes.'

- **NIH Employee?:** Indicate whether the appointee is a current NIH employee.
- **Appointee's First name, MI, Last Name, Appointee Email address, Employee ID:** If the appointee is a current Federal NIH employee, use the Employee Lookup feature to auto-populate their information. If not, manually enter all information (including personal email address).
- **Related Recruitment WiTS #:** For Appointment actions initiated directly from Recruitments, this will be auto-populated. For stand-alone Appointments, enter the related Recruitment, if applicable.
- **Announcement #:** For recruitment-related Appointments, select the announcement number.

- **Certificate #:** For recruitment-related Appointments only, select the certificate number.
- **Relationship to Recruitment Action:** For recruitment-related Appointments only, indicate if the appointment is the 1st Selection, Additional Selection, or from a Shared Certificate.
- **Certificate Type:** For recruitment-related Appointments only, select the certificate type.
- **Cap HR Job Requisition#:** This will be populated for actions created from the Unassigned Staffing process. If not, manually enter the number.
- **Position Title, Pay Plan, Series, & Grade:** Enter the information for the position that the employee is entering. For Appointments that are related to recruitments, these fields will be auto-populated based on the certificate that is selected.
- **Full Performance Level, Step, Pay Tier, Pay Band:** Enter the information for the position that the employee is entering.
- **Special Pay Indicator:** Select the appropriate Special Pay Indicator Type from the dropdown. If the series you entered does not contain occupations eligible for Title 38 Premium Pay, this field will be defaulted to 'Not Applicable'.
- **Related JCPN WiTS:** Enter the JCPN if there is one associated with this action.
- **Job Code:** Enter the job code associated with this appointment. The Job Code Lookup feature can be used to identify appropriate Job Codes in Capital HR.
- **Position Number:** Enter the position number associated with this appointment. The Position Number Lookup feature can be used to locate vacant position numbers from Capital HR that may be used for the appointment.
- **Duty Station:** Select the appointee's duty location from the lookup.
- **Duty Station Code:** System-generated.
- **Reports To (Supervisor) First Name, Last Name, Supervisory Status, Email Address:** The Employee Lookup feature should be used to locate the information for the position's Supervisor.
- **CAN:** Enter the Common Accounting Number.
- **HR Cards PD Used: I**ndicate whether an HR CARDS position description was used. "Used" is defined as using an HR CARDS PD or the Evaluation Statement as the basis for the position description that the appointee will be placed on.
- **HRC# (HR Cards Number):** If an HR CARDS PD was used, enter the HRC Number.
- **Legislative Initiative Supported:** Defaults to N/A. Indicate whether the position will be supporting a Legislative Initiative.
- **Date Cert Sent to Selecting Official:** For recruitment-related Appointments only, enter the date that the certificate was sent to the Selecting Official.
- **Date of Hiring Decision:** For recruitment-related Appointments only, enter the date that the Selecting Official made the hiring decision.
- **Date Hiring Decision Received in HR:** For recruitment-related Appointments only, enter the date that OHR received the hiring decision and authorized the HRS to make the tentative job offer.
- **Date of Tentative Job Offer:** Enter the date that you made the first attempt (e.g., called, left a voice message, email, etc.), to contact the selectee to offer the job.

- **Tentative Job Offer Response Date:** Enter the date the candidate responded to the tentative job offer.
- **Job Offer Response:** Select the candidate's response from dropdown. *Note: If the candidate declines, select 'decline' for tracking purposes**, SAVE THE ACTION** and then cancel the action.*
- **Additional Approval Required:** Indicate if any additional approvals (Student Loan Repayment, Service Credit for Annual Leave, Ethics clearance, etc.) are required before making the Official Job Offer. If "Yes", enter the associated dates on the Approvals Information tab.
- **Date Security Investigation Initiated:** This field is auto-populated with the 'Job Offer Response' date
- **Date Prepare for New Hire Email Sent to AO:** System generated. Date stamp of when the Date Prepare for New Hire Email was sent to the HRS, HRA, Administrative Officer or IC Contact. For more information about this email, visit our email library.
- **Date of Official Job Offer:** This is the date you communicated the final conditions of the offer (salary, incentives, EOD Date, etc.) to the selectee.
- **Official Job Offer Response Date:** Enter the date the candidate responded to the official job offer.
- **Type of Selection:** Indicate whether the selection was competitive or non-competitive.
- **Appointment Type:** Select the appointment type.
- **OGE-278 Filer?**: Indicate whether the appointee will be subject to OGE-278 (Public Financial Disclosure) filing requirements.
- **Nature of Action Code (Dynamic):** Selections based on 'Appointment Type'. Select the appropriate Nature of Action Code and associated Nature of Action.
- **OGE – 450 Filer?** Indicate whether the appointee will be subject to OGE-450 filing requirements.
- **Hiring Flexibility Used?** Indicate whether a hiring flexibility was used for this appointment.
- **Priority Placement:** Indicate whether this will be a priority placement.
- **Hiring Flexibility Type:** If a hiring flexibility was used, select the hiring flexibility type.
- **Other (Hiring Flex Type):** Use this field to manually enter the hiring flexibility, if applicable.
- **Pathways Agreement (Dynamic):** Appears when 'Hiring Flexibility Type' selected is related to any Schedule D type. Indicate that the Pathways Agreement was completed.
- **Expected Date of Conversion (Dynamic):** Appears when 'Hiring Flexibility Type' selected is related to any Schedule D type. Enter the appointee's expected program completion date.
- **Basic Pay:** Enter the appointee's Basic Pay.
- **Adjusted Basic Pay:** Enter the appointee's Adjusted Basic Pay.
- **Professional Designation:** For Title 42 appointments, select the approved Professional Designation.
- **Category:** For Title 42 appointments, select the approved Category.
- **Medical Specialty:** Select the appointee's medical specialty, if applicable.
- **Board Certification:** Enter the appointee's board certification, if applicable.
- **Eligible for Benefits:** Indicate whether the appointee is eligible for benefits. Select 'Yes'. N*ote: If 'yes' is selected and the Attending Orientation field is either 'Full Orientation' or 'Presentation Only' on the Orientation Tab, a new benefits action is created and routed to the associated Benefits Assistant in BPLB. If this action results in the employee attending 'DSSEM Orientation,' a benefits action is created*

and routed to the associated Benefits Assistant in BPLB, immediately after the Appointment action is routed to the FA.

- **Veterans Preference:** Select the appointee's Veteran Preference code.
- **Reemployed Annuitant:** If the appointee is a reemployed annuitant, indicate if they have been granted a waiver of salary offset or not. This field triggers an email notification to the servicing WRD Benefits Specialist.
- **EOD Date:** Enter the appointee's entrance on duty date, which is the date on which an appointee completes the necessary paperwork and is sworn in as an employee.
- **NTE Date:** Enter the not-to-exceed date.
- **Date Educational Docs Rec'd:** Enter the appropriate date.

Approvals Tab

Note: Dynamic fields will only appear based on what is selected in another field. For example, an 'Approval Number' field may only appear if the 'Approval Needed?' field is marked as 'Yes.'

- **HCC Approval Required:** Select 'yes' or 'no'.
- **HCC Approval Number (Dynamic):** Triggered by HCC Approval Required field. Enter the related HCC approval number.
- **Release Date Requested:** Indicate if a release date has been requested for this appointment.
- **Date Release Requested:** Enter the date you contacted the losing agency or organization for a release of their employee.
- **Approved Release Date:** Enter the release date.
- **Date Pkg Sent for Additional Approval:** If applicable, enter the date that the approval package was sent to the authorizing official(s). For cases where multiple approvals are required, enter the date of the first approval package sent.
- **Date Approval Decision Rec'd in HR:** If applicable, enter the date that HR received a decision (and authorization to make the Official Job Offer) on all additional approvals.

- **FIC/DIS Approval Date:** Enter the date the Fogarty International Center/Division of International Services approved the visa, if applicable.
- **VISA/EAD Type:** Select the type of visa or other Employment Authorization Document, if applicable.
- **VISA/EAD Effective Date:** Enter the date the visa or other Employment Authorization Document was effective, if applicable.
- **VISA/EAD Expiration Date:** Enter the date the visa or other Employment Authorization Document expires, if applicable.
- **DEU Selection Approver:** Select the individual in the CSD DEU who will approve of the DE selection. This individual is typically the same person who issued the certificates (i.e., DE HRS).
- **Addt'l DEU Selection Info Needed:** Enter any comments if the CSD DEU requires additional information from the Branch HRS to make an approval decision.
- **DEU Selection Decision:** Indicate whether the selection is "Approved" or "Disapproved."
- **Date to DEU For Decision:** System-generated date, which is a time-stamp of when the WiTS action was sent to the CSD DEU by the Branch HRS. If the Branch HRS re-sends the action to the CSD DEU, WiTS will override the original date.
- **Date of DEU Selection Decision:** Enter the date that the DEU's final decision ("Approved" or "Disapproved") was made.
- **DEU Selection Decision Comments:** Enter any comments related to the disapproval of the selection. *Note: Comments entered into this field will be pulled into the "Disapproved by DEU" email sent to the Branch HRS. Only enter comments in this field if the selection was not approved.*

Pay Tab

Action Details	Appointment	Approvals	**Pay**	Orientation	Final Processing

	* Required Fields
Pay Type:	▾

Note: Dynamic fields will only appear based on what is selected in another field. For example, an 'Approval Number' field may only appear if the 'Approval Needed?' field is marked as 'Yes.'

- **Pay Type:** Select applicable type.
- **Date HPR Authorized by IC (Dynamic):** Appears if 'Pay Type' field is marked as 'Highest Previous Rate'
- **Maximum Payable Rate (Dynamic):** Appears if 'Pay Type' field is marked as 'Highest Previous Rate'
- **Date ARP Sent for Approval (Dynamic):** Appears if 'Pay Type' field is marked as 'Advance Rate of Pay'
- **Date ARP Approved (Dynamic):** Appears if 'Pay Type' field is marked as 'Advance Rate of Pay'
- **ARP Justification (Dynamic):** Appears if 'Pay Type' field is marked as 'Advance Rate of Pay'
- **ARP Step Determination Based On (Dynamic):** Appears if 'Pay Type' field is marked as 'Advance Rate of Pay'
- **Step Assigned:** Select applicable step.

Orientation Tab

Action Details	Appointment	Approvals	Pay	**Orientation**	Final Processing

* Required Fields

Attending Orientation?*: [▼]

Orientation Location: [▼]

Hire Type: [▼]

Orientation Date: (mm/dd/yyyy) [　　　] 📅

Appointee's Email Address for Orientation Contact: Help [　　　]

Date Official Offer Letter Sent*: (mm/dd/yyyy) [　　　] 📅

Note: Dynamic fields will only appear based on what is selected in another field. For example, an 'Approval Number' field may only appear if the 'Approval Needed?' field is marked as 'Yes.'

- **Attending Orientation:** Indicate if the appointee will be attending the full New Employee Orientation (NEO), presentation only, or if they will not be attending. Selecting 'Not Attending' will lock down the other orientation-specific fields. *Note: If on the Actions Tab 'yes' is selected in the DSSEM field, the Attending Orientation field will default to 'DSEEM Orientation'. Also, if the Eligible for Benefits field = 'Yes' and the Attending Orientation field is either 'Full Orientation', 'Presentation Only', or 'DSSEM Orientation,' a benefits action is created and routed to the associated Benefits Assistant in BPLB, immediately after the Appointment action is routed to the FA.*
- **Orientation Location:** Select the location where the appointee is scheduled to attend the New Employee Orientation, if applicable.
- **Hire Type:** Select the hire type.
- **Servicing Team Leader (Dynamic):** Select the appropriate contact. *Note: This field will appear if on the Actions Tab 'yes' is selected in the Global Recruitment field.*
- **Orientation Date:** Enter the date that the appointee is scheduled to attend the New Employee Orientation, if applicable.
- **Appointee's Email Address for Orientation Contact:** Enter the appointee's personal email address that will be used to contact the appointee regarding orientation.
- **Date Official Offer Letter Sent:** Enter the date the official offer letter was sent to the appointee.

Final Processing Tab

Action Details	Appointment	Approvals	Pay	Orientation	**Final Processing**

* Required Fields

Effective Date*: [　　　] 📅 *Payroll Calendar*

Temporary Federal Employee ID Assigned*: ❓ [No ▼]

Date Pro'd in Capital HR*: [　　　] 📅

Note: Dynamic fields will only appear based on what is selected in another field. For example, an 'Approval Number' field may only appear if the 'Approval Needed?' field is marked as 'Yes.'

- **Effective Date:** Enter the date on which the employee's official assignment begins.
- **Date Pro'd in Capital HR:** Enter the date on which the personnel action was processed.

- **Temporary Federal Employee ID Assigned:** Indicate if the appointee was assigned a temporary federal employee identification number.

The Routing Menu

The routing menu is used to move actions through the process and/or to send emails. The following list includes definitions for all routing options. The options and email recipients may change based on which user possesses the action.

CSD HRS options:
- **Send Pckg Recd Email:** sends an email to the AO (From: person using this option) contact advising the action has been received and is under review.
- **Send Pckg Incomplete Email:** sends an email to the AO (From: person using this option and cc: CSD HRS and HRA) contact advising the package is incomplete.
- **Initiate JC/PN:** creates a new Job Code/Position Number request and routes the action to the HRS.
- **Send to DEU (Set Apprvl):** routes the action to the CSD DEU for approval. An email is sent to the HRS and the DEU Selection Approver, notifying both parties that the CSD DEU has received a request to review a selection for approval.
- **Send to HRA:** routes the action to the HRA.
- **Send to Final Authorizer:** routes the action to the Final Authorizer for final processing.
- **Cancel Action:** Cancels the action.

CSD HRA options:
- **Send to HRS:** routes the action to the HRS.
- **Send to Final Authorizer:** routes the action to the Final Authorizer for final processing.
- **Cancel Action:** Cancels the action.

CSD DEU options:
- **Sel Apprvd-Return to Branch:** sends an email to the HRS advising the action has been reviewed and approved.
- **Sel Dispprvd-Return to Branch:** sends an email to the HRS advising the action has been reviewed but has not been approved.
- **More Info Needed-Return to Branch:** sends an email to the HRS advising the action has been returned because more information is needed. Body of the email will include the comment left in the 'List of Missing Docs/Info' field.

Final Authorizer:

- **Action Complete:** completes an action, sends it to the archives, and sends an email to the AO, CSD HRS and HRA that the Appointment action has been processed.
- **Return to HRS:** routes the action to the HRS.
- **Return to HRA** routes the action to the HRA.

Email Notifications

- Subject: Action Required-OGE-278 Appointment Clearance - An email is automatically sent to the NIH Ethics Office, the CSD Branch Chief, Team Leader and HRS associated with the action, after 'Yes' is selected and saved for the 278 Filer field.
- Subject: Title 38 Appointment Action Completed for John Doe - If the Appointment action was processed for an employee in the 'GP' pay plan, an automated notification is sent to the NIH Title 38 Team.
- Subject: Appointment Action for Reemployed Annuitant in Progress for John Doe - When 'Yes' is selected on the 'Reemployed Annuitant' field on the Appointment tab, a notification is sent to the servicing WRD/Benefits Specialist the next day.
- Subject: Title 38 Premium Pay Timekeeping Designation Email – When 'Title 38 Non. Clin. Nurse' is selected from the Special Pay Indicator dropdown field, an email is sent the day after the action is completed to the AO, copying the HR Specialist, HR Assistant and HR Team Lead. The email will appear to come from the HRS on the Appointment Action but is sent from WiTS.
- Subject: Action Needed: re: Your New Position at NIH – This email is sent to new OHR employees with a CC to the HRS and AO and appears to be sent from the HRS on the appointment action. This email is to ensure new OHR employees are added to NED as soon as the job offer has been made, to facilitate the initiation of the DPSAC security clearance. The email is sent at 6:00 am the morning after the Tentative Job Offer Date, Tentative Job Offer Response Date, and New Hire email fields have been completed AND when Full Orientation or Presentation Only are selected from the Orientation Tab.

For more information, visit our Email Library.

Related Reports/Dashboards

- Appointment Actions Report
- Appointment KPI Report
- Entrance on Duty Report
- Orientation Report
- Status Report
- Recruitment Actions Report/ Selection Info View

For more details, visit our Reports/Dashboard Library- *Coming Soon!*
To learn how to run a WiTS report, see our WiTS Reports User Guide- *Coming Soon!*
To start/stop/modify a report subscription, visit our WiTS Subscription Page, for instructions.

Key Players

CSD HRA or HRS (Initiates Action)	CSD HRS	DEU Unit (Optional)	Final Authorizer (Completes Action)
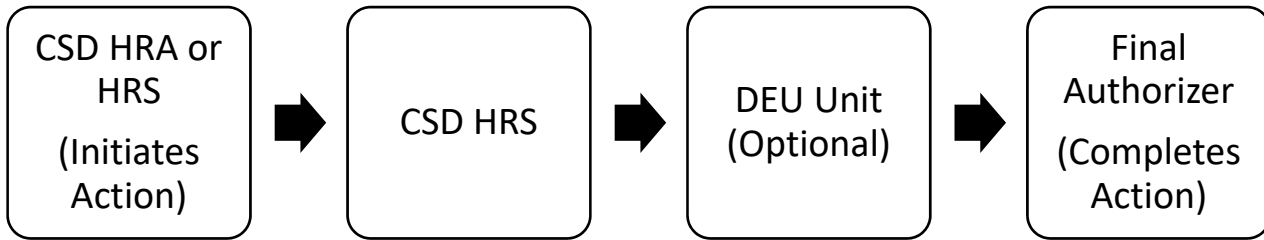
Video Tutorials

No videos currently available.

For more information, visit our Video Library.

Need more than a video? You can request training- Submit an HRSS ticket (Get Help with an HR System), select Issue Category: WiTS-Training Request, and someone from the WiTS Project will contact you!