USER GUIDE

RECRUITMENT (CSD Branches)

Using the Recruitment Form

When to Use the Recruitment Form

1. When the Client Services Division is leading the recruitment effort. This includes Title 5 (non-Senior Executive Service) and Title 42 announcements.

2. When the Institute or Center (IC) is leading the recruitment effort and the Client Services Division announces the vacancy in an OHR Staffing System. For example, the Client Services Division announces the vacancy in HHS Careers (USA Staffing), but the IC will perform all the rating and ranking procedures.

When NOT to Use the Recruitment Form

1. When the Compensation and Senior/Scientific Employment Division (CSSED) is leading the recruitment effort.

2. When the vacancy is for a Senior Executive Service (SES) or non-full-time equivalent (FTE) position.

Initiating a Recruitment Action

As a stand-alone Recruitment

Although the majority of WiTS Recruitment actions are auto-generated shortly after a Job Requisition is approved in Capital HR—there may be times when an HR Specialist needs to manually initiate a Recruitment action. In those cases only, the HR Specialist will select *Recruitment* from the Action Initiation bizcove on the WiTS Work Area Page:

From the Capital HR interface

Shortly after a Capital HR Job Requisition is approved, an action is automatically generated in WiTS and can be found in the **Unassigned Staffing Processes** bizcove for your Branch. Because WiTS does not know whether the incoming action is a Recruitment or an Appointment, it is held in the unassigned staffing area until a CSD staff member retrieves it and assigns it as either a Recruitment or an Appointment.

Assigning these actions and beginning work on them in a timely manner is critical. For this reason, a series of reminder emails are sent (on business days only) when an action has not been assigned to an HR Specialist:

- **On the 3rd business day** – email to all Team Leaders in the branch
- **On the 5th business day** – email to Branch Chief
- **On the 7th business day** – email to Deputy Director that is assigned to the branch

To assign the action, the CSD staff member will click on the checkbox next to the action and select "Open Selected Action"

Recruitment or Appointment

When the CSD staff member opens the action, the *Determine Staffing Process* form displays information that was sent from Capital HR.

The CSD staff member reviews this information and determines whether the action is a Recruitment or an Appointment. This step is necessary because IC staff may enter Capital HR Job Requisitions for Recruitments, but may also enter them for Appointments where recruitment is not necessary (Shared Certificate selections, Committee Members, Special Experts, certain non-competitive appointments, etc.). Whether the Capital HR Job Requisition is used in this manner will vary from IC to IC.

All of the fields on the *Determine Staffing Process* page contain information that was entered by the IC staff member and cannot be edited at this junction. These fields can be edited after an Appointment or Recruitment action is created. Blank fields indicate that the IC staff member did not enter the information into Capital HR.

Any comments the IC staff member entered into the Capital HR Job Requisition are listed in the Cap HR Comments field; any attachments to the Capital HR Job Requisition are also contained in the WiTS action.

WiTS Tip: Branch HR Specialists can refer IC staff to the Capital HR User Guides Web Page for more information on Capital HR and how to create a Capital HR Job Requisition.

Steps for assigning a Determine Staffing Process action to an HR Specialist

1. The CSD staff member indicates whether the Global Recruitment Unit (GRU) will handle the action or not.

2. The CSD staff member assigns the action to the appropriate HR Specialist by selecting their name from the CSD HR Specialist drop down menu.

3. If the action is a Recruitment, the CSD staff member selects *Initiate Recruitment* from the routing menu and clicks on the checkmark to route the action.
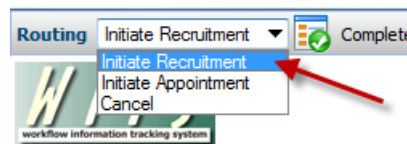
If it is determined that the action is an Appointment, the CSD staff member selects *Initiate Appointment*. For more information on how to use the Appointment workflow, please reference the *User Guide – Appointment.* If the action was initiated in error, you can cancel the action. You may re-use the Capital HR Job Requisition # if you cancel an action.

4. The Recruitment action is sent to the worklist of the assigned CSD HR Specialist.

Upon receipt of the Recruitment action, the CSD HR Specialist reviews or completes the information on the *Transaction Information* and *Pre-Recruitment Information* tabs.

WiTS Tip: Please ensure that the remarks entered by the IC staff member do not contain Personally Identifiable Information (PII). If you find PII, please contact the WiTS Team as soon as possible. For more information on PII and information security, please refer to the Office of Human Resources (OHR) Information Security Web Page.

Managing WiTS Recruitment Actions - Best Practices (Pre-Recruitment)

Creating Manual WiTS Recruitment Actions

Although the majority of WiTS Recruitment actions are auto-generated shortly after a Capital HR Job Requisition is approved, there may be times when a Branch HR Specialist needs to initiate a Recruitment action manually. To promote consistency and to track the length of time an action spends in the 'Pre-Recruitment' stage (i.e., *the time between the 'Date Entered' and the 'Date Complete Package Received'*) *accurately*, HR Specialists should adhere to the following guidance:

- **Before creating a manual WiTS Recruitment action, the Branch HR Specialist should request that the IC staff approve the Capital HR Job Requisition.** The Branch HR Specialist should contact the IC staff (or Administrative Officer) and ask that they approve of the Capital HR Job Requisition. If after multiple attempts and the IC staff has not approved the Capital HR Job Requisition, then the Branch HR Specialist should create a manual WiTS Recruitment action.

- **Before performing any "substantial" work on a vacancy announcement, the Branch HR Specialist should create the associated WiTS Recruitment action, if the IC staff has not approved the Capital HR Job Requisition.** For the purposes of this guidance, "substantial" means any work including, but not limited to any effort associated with assessment/job analysis creation or modification, vacancy announcement development, and other similar functions. Substantial does NOT mean casual conversations about a vacant position, sharing certificates, sharing position descriptions, and other similar functions.

  o If a Capital HR Job Requisition is initiated after a Recruitment action has already been entered in WiTS manually, the Branch HR Specialist should cancel the subsequent action that was generated by the interface.

Managing WiTS Recruitment Actions

To promote consistency, Branch HR Specialists should adhere to the following guidance:

- **Branch HR Specialists should update the Action Status Code, Action Status, and Action Status Description throughout the recruitment process.** The Branch HR Specialist should be especially mindful of these fields during the Pre-Recruitment phase of the recruitment. Selecting the appropriate Action Status Code, Action Status, and Action Status Description provides CSD Leadership (and IC staff) with a 'quick look' at the action.

Closing (Completing) a WiTS Recruitment Action in the Pre-Recruitment stage

There may be times when a Branch HR Specialist has to close a recruitment action during the Pre-Recruitment Stage. **Note:** Closed actions appear on reports (including the workload report); and they are removed from the pre-recruitment reminder emails. The Branch HR Specialist has three options to close a recruitment action during the Pre-Recruitment Stage. *Please review the Closing WiTS Recruitment Actions section of this guide for more information on closing recruitment actions.*

1. **Action Disapproved – Close Action:** Select this option when the IC, Office of Human Resources, or other office/organization disapproves or requests the stoppage of the recruitment action, for any reason. This will close (not cancel) the action and send it to Archives.

2. **Position Not Filled – Close Action:** Select this option when the IC does not wish to fill the position or the position was not filled. This will close (not cancel) the action and send it to Archives.

3. **No Response – Close Action:** Select this option when you (the Branch HR Specialist) have received no communication or follow-up on the recruitment action for 90 consecutive days during the pre-recruitment phase of the action. *Please consult your Team Leader or Branch Chief before using this option.* This will close (not cancel) the action and send it to Archives.

Cancelling WiTS Recruitment Actions

There may be times when a Branch HR Specialist has to cancel a recruitment action. **Note:** Cancelled actions do not appear on any reports (including the workload report), and they are removed from all reminder emails. If a Branch HR Specialist performs a substantial amount of work on an action, they should consider completing the action using one of the options in the Closing WiTS Recruitment Actions section of this guide.

Examples of when cancelling a WiTS recruitment action is appropriate:

- If the Branch HR Specialist creates a manual recruitment action and the IC staff subsequently approves a Capital HR Job Requisition. In these cases, the Branch HR Specialist must cancel the WiTS recruitment action created through the Capital HR Interface.

- If the recruitment action was entered in error.

WiTS Tip: Branch HR Specialists should avoid cancelling recruitment actions if they perform a substantial amount of work on an action as they are removed from all reports.   Additionally, cancelling and re-creating a recruitment action will give the appearance that the action took a shorter amount of time in the Pre-Recruitment Stage than actuality. Consult your Branch Chief, Team Leader, WiTS Super User, or the WiTS Team if you have questions about cancelling a recruitment action.

Transaction Information Tab

- **WiTS #:** Is automatically assigned and is un-editable.

- **Date Entered:** Is automatically assigned when the recruitment action is created, and is un-editable.

- **Date Received in HR**: Is automatically assigned (same date as when the action was created). This field is editable. This field represents the date that the initial request for a recruitment was received by the Branch HR Specialist.

- **AO First Name, Last Name, Email address**: The *NED Lookup* feature should be used to locate the information for the Administrative Officer or IC Contact.

- **Global Recruitment?** Select "Yes" if this is a global recruitment. Otherwise, select "No."

- **Administrative Code, Institute/Center, Organization Initials**: Enter the Admin Code associated with the recruitment. For Capital HR-initiated recruitment actions, this field will be autopopulated with the information from Capital HR.

- **Proposed Effective Date**: Enter the estimated effective date of the first selection from this recruitment action. For Capital HR-initiated Recruitment actions, this field will be autopopulated with the information the IC entered in Capital HR.
  - *Upon receipt:* Set the date to when you forecast the first appointee's effective date.
  - *Upon Cert Issuance:* Enter the date when all of the certificates will expire. This keeps the action active so that it will be captured on the *Vacancy Announcement and Certificate Report and Status Report.*

- **CSD Branch Chief, CSD Team Leader, CSD HR Specialist, CSD HR Assistant, Final Authorizer:** Select the appropriate participants.

- **Is the package complete?** This will default to "No" and will always remain as "No." *By definition, a recruitment package will never be initially complete as internal OHR or CSD approvals are required before posting.*

- **Date Complete Package Received:** Enter the date that all required internal and external approvals (Team Leader, DEU, etc.) were received and the vacancy was ready to be posted in the staffing system. *For actions where there is more than one approval date, due to multiple announcements, (e.g., All Sources Announcements) and if the announcements are not posted on the same day, use the earliest approval date. This will prevent negative metrics on the KPI and Recruitment Actions Report.*

WiTS Tip: If the "Date Complete Package Received" field is deleted, the "Date Announcement Posted", "Date Announcement Opened", and "Date Announcement Closed" fields will also be deleted.

Comments and Action Status Codes/Descriptions

Comments, Action Status Code, Action Status, and the Action Status Description fields are visible to HR staff and IC customers on a majority of WiTS reports. It is important that these fields are current and accurate. Entries in the Comments section should include a timeline of the action's progression. They should be listed in reverse chronological order with the most recent entry at the top of the comments field, and they should be updated at least weekly.

Best Practices for Comments:

- **Be Brief**—The Comments field allows 5000 characters, which includes spaces. List only what is necessary to avoid causing the action's entry in the reports to be excessively lengthy.

- **Be diplomatic** – Your comments should not include sensitive information about employees. Be mindful of the fact that our IC customers view these comments through WiTS reports and be careful not to give the appearance of assigning "blame" if an action is taking longer than expected.

- **Be careful**—Do not add any information related to name requests or other information that may give the appearance of pre-selection.

- **Be timely** – Your comments should reflect the most recent status of the action and always check your spelling and grammar.

WiTS Tip: Recruitment actions created on or after July 15, 2013, will have the following data auto-populated on the Status Report, Age of Actions Dashboard, and the Active Recruitment Action Email.

Autopopulated fields/data	Status Report	Age of Actions Dashboard	Active Recruitment Action Email
Scheduled Reminders (45, 60, 75, and 90 day emails)	✓	✓	✓
Common Accounting Number (CAN)	✓		✓
Time Keeper Number (TK#)	✓		✓
Selecting Official	✓	✓	✓
Administrative Officer	✓		✓
Announcement Number(s)	✓		
Open Date(s)	✓		
Close Date(s)	✓		
1ˢᵗ Hiring Decision Due Date	✓		
(12 Latest Certs Only) Certificate Number, Type, Title, Grade, Issue Date and Expiration Date	✓		

Reference the [Active Recruitment Action (Pre-Recruitment) Email](#) section of this guide for a sample email.

Pre-Recruitment Information Tab:

The Pre-Recruitment Information tab is meant to collect data related to the IC's recruitment request and the pre-recruitment consulting during the Pre-Recruitment Stage that is performed by OHR.   All of the fields on the Pre-Recruitment Information tab are required before sending an action to the Client Services Division, Delegated Examining Unit (CSD DEU), if applicable, for vacancy approval.

- *Selecting Official First Name, Last Name, Email address*: The *NED Lookup* feature should be used to locate the information for the selecting official.

- *Supervisor's First Name, Last Name, Email address:* These fields are only needed in cases where the position's supervisor is different from the Selecting Official. The *NED Lookup* feature should be used to locate the information for the position's supervisor.

- *Cap HR Job Requisition#:* Enter the Capital HR Job Requisition number. For Capital HR-initiated Recruitment actions, this field will be autopopulated. Note: You can reuse a requisition number multiple times if needed.

- *Date Job Requisition Approved:* Enter the date that the Capital HR Job Requisition was approved. For Capital HR-initiated Recruitment actions, this field will be autopopulated.

- *Date of Pre-Recruitment Meeting:* Enter the date of the Pre-Recruitment Meeting with the IC customer, if held.

- *Date Pre-Recruitment Form Signed by Selecting Official:* Enter the date the Pre-Recruitment Worksheet was signed by the Selecting Official and Administrative Officer.

- *Recruitment Type:* Select either Title 5 or Title 42.

- *Date Need Validated:* This field is autopopulated with the date that was entered in the "Date Complete Package Received" field on the Transaction Information Tab and is un-editable. *For Recruitment actions, the Date Need Validated and the Date Complete Package Received have the same meaning.*

Position Title*	Pay Plan*	Series* (4 digits)	Grade* (Hold CRTL key and click all options that apply)	Full Performance Level (FPL) *	Duty Location(s)* (Hold CRTL key and click all options that apply)
Administrative Officer	GS	0341	09 / 10 / 11 — 09, 11	12	Montgomery County, MD / Baltimore Metro Area / Frederick County (Ft Detrick Area)

In the position section of the *Pre-Recruitment Information* tab, enter the requested *Position Title, Pay Plan, Series,* and *Grade.* For Capital HR-initiated Recruitment actions, this field will be autopopulated if the IC staff member entered the information in Capital HR. The HR Specialist will enter the *Full Performance Level, Duty Location and Vice* information. *The Vice field is meant to capture the person's name who previously held the position, if applicable.*

WiTS Tip: Use the "Add New Position" button to add additional positions if there are multiple titles (e.g., Multidisciplinary Positions or positions with different titles at different grades). Do not add a new position for multiple grades. You can select multiple grades in the grade field by holding down the Ctrl key and selecting the grades.

- **Legislative Initiative Supported:** Indicate whether the position will be supporting one of the following Legislative Initiatives: The American Recovery and Reinvestment Act (ARRA), Roadmap, Stem Cell, or Other research. If the position will not be supporting a Legislative Initiative, leave the field as 'N/A'.

- **# of Positions Advertised:** Enter the number of positions requested to be advertised.

- **CAN#:** Enter the Common Accounting Number.

- **Timekeeper #:** Enter the number of the position's Timekeeper.

- **Is this a New Position?** Indicate whether this is a new position. A "New Position" is defined as a full-time equivalent designation with a brand new position description or classification. A minor modification to the position description is not a New Position.

- *Is this a Re-Advertisement?* Indicate whether this is a re-advertisement of a previously announced position. Re-advertisements are usually within 60 days of the previously announced position's closing date. *Please consult your Team Leader and Branch Chief before re-advertising a position.*

- *HR CARDS PD Used?* Indicate 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 of the advertised position.

- *HRC# (HR CARDS Number):* If an HR CARDS PD was used, enter the HRC Number. *The HRC Number is the digit in the far left column.*

HRC# ⬇	PP - Series - Grade ⬇	Position Title ⬇
1 ⬅	GS - 0201 - 05	HUMAN RESOURCES SPECIALIST(EMPLOYEE BENEFITS)

- *Related WiTS Classification #:* If applicable, enter the related WiTS Classification #.

- *Transitional Recruitment?* If this is a transitional recruitment (recruiting while the position is still encumbered for training purposes—often called Dual Incumbency), select Yes. Otherwise, select No.

- *Other Recruitment Considerations:* Indicate if alternative methods were considered before posting a vacancy announcement. Indicate if applicants were reviewed by the Selecting Official through a shared certificate, the use of a Global Recruitment was available and proposed to the Selecting Official, or if Other Considerations were pursued. Other Considerations are any other alternative methods to filling a position without the posting of a vacancy announcement such as the review of non-competitive applications (Schedule A, VRA eligibles, Reemployed Annuitants, etc.). If no considerations were used before recruiting, select N/A.

- *Paid Ad:* Indicate whether a paid advertisement will be used for this recruitment. *Please consult your Branch Chief before using a paid advertisement.*

- *Clearance Level Required for Position:* Enter the security level required for the position. This selection should match what was advertised in the USA Staffing vacancy announcement(s).

- *Date Paid Ad Approved:* If a paid advertisement will be used for this recruitment, enter the date it was approved. This is usually the date that your Branch Chief approved the advertisement.

- *Will Relocation Expenses Be Paid?* Indicate whether the IC is willing to pay relocation expenses for a selected candidate. NOTE: *This relocation type is administered under* 41.C.F.R.302 *and should not be confused with a Relocation Incentive administered under* 5.C.F.R. 575.

- *Incentives Offered:* Select which incentive(s) the IC, if any, will offer to a selected candidate. NOTE: *The Relocation Incentive in this list refers to the incentive administered under* 5.C.F.R. 575.

- *Additional Recruitment Channels:* Identify any additional recruitment channels used.

- *Pre-Recruitment Comments:* This field will be populated with any comments the IC entered in the Capital HR job requisition. This field is editable if you need to add or edit any comments.

➢ **Communication Point**

After the program area initially submits a recruitment request package, the Branch HR Specialist has the option to select "Send Pkg Rec'd Email" from the routing menu. This will send an automatic email notice to the Administrative Officer, Selecting Official, Supervisor, and the HR Specialist that the Recruitment action has been received in HR.
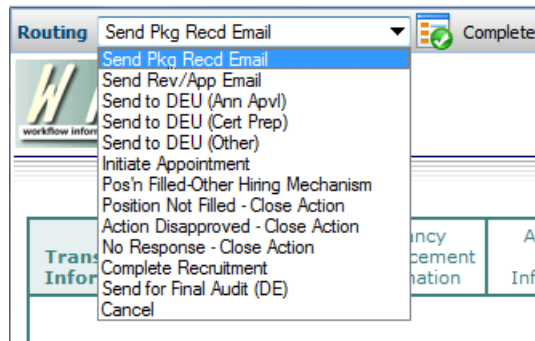
Subject: Recruitment action for HR Specialist,GS-0201-12 (WiTS #27138) - Under Review

The Office of Human Resources has received your recruitment for the position(s) listed below in the Test, Play/Testing Branch, administrative code TEST. The assigned Workflow information Tracking System (WiTS) transaction number is #27138; please include this number with all inquiries.

Requested Position Title	Requested Pay Plan	Requested Series	Requested Grade(s)
HR Specialist	GS	0201	12

You will be contacted to schedule a Strategic Recruitment meeting or if any further information is needed after the action has been reviewed (for example, when items related to the recruitment need your approval such as the vacancy announcement(s), weighted questions, etc.).

For more information on WiTS, including access to WiTS Reports for authorized Test staff, please visit the WiTS page on the OHR website at:
http://hr.od.nih.gov/hrsystems/staffing/wits/default.htm.

WiTS Tip: The steps that follow occur over the life of the recruitment action. It will be necessary to continually save and retrieve the action to update the information as the case progresses.
It is critical that the Action Status Code, Action Status, Action Status Description, Internal Comments, and Proposed Effective Date be updated as the case continues.

Vacancy Announcement Information Tab

The Vacancy Announcement Information tab is meant to collect data related to the announcement(s) of the position(s).

- *Number of Positions Advertised:* Indicate the number of positions that will be advertised.

- *Area of Consideration (AOC):* Select the AOC
  - All sources
  - DE only
  - All sources (non-DE) [1]
  - Government-wide
  - HHS-wide
  - NIH-wide
  - IC-wide
  - Lab/Office/Branch-wide
  - CTAP/ICTAP only

[1] Use this area of consideration for vacancies where you are accepting applications from U.S. citizens and you are not using Delegated Examining procedures (e.g., Direct Hire, Excepted Service, etc).

- **Case Examining Register:** Please indicate if the Recruitment is a Case Examining Register. The default option is 'No.'

    A Case Examining Register is a recruitment method using the same guidelines, principles, and procedures as a traditional Case Examining vacancy; however, a List of Eligibles is furnished upon the selecting official's request rather than at pre-determined dates. Lists are issued at the time of request, starting from when the vacancy opens through the expiration date of the register. Applicants are assessed for basic qualifications and eligibility requirements and rated/ranked against any criteria, if applicable, then are placed on a List of Eligibles grouped in the same manner as traditional certificates (i.e.,

Occupational Series, Grade, Duty Location, Specialty, and any other employment conditions) with qualifying preference eligibles ordered atop each list.

- **Multidisciplinary Position?** Indicate whether the position is multidisciplinary (i.e., can be filled in more than one series). *This is often referred to as an interdisciplinary position*.

- **Vacancy Identification (VIN) #:** Enter the Vacancy Identification number or VIN.

- **Vacancy Announcement #:** Enter the vacancy announcement number.

- **Announcement Type:** Select the announcement type (DE, MP, DH, or Other).

WiTS Tip: Ensure the vacancy announcement number, vacancy identification number (VIN), and announcement type are correct before sending the action to the CSD DEU for approval, and before you enter data on the Applicant Rating Information and Certificate Information tabs. Changing the vacancy announcement number will cause you to lose data on multiple fields on the Applicant Rating Information and Certificate Information tabs.

Vacancy Identification (VIN) #*:	789456
Vacancy Announcement #*:	NIH-TEST-13-MP-789456 ❓

- **Date Announcement Posted:** Enter the date the vacancy announcement was posted (or released to USAJobs) in the staffing system.

- **Date Announcement Opened:** Enter the opening date of the vacancy announcement.

- **Date Announcement Closed:** Enter the closing date of the vacancy announcement.

- **Date Announcement Cancelled:** Enter the date the vacancy announcement was canceled, if applicable. NOTE: *Placing a date in this field will stop the SLA reminder emails and remove the announcement from your dashboard. However, the announcement will still remain on all reports unless the action itself is cancelled.*

- **Open Continuous Announcement?** Indicate whether this is an open continuous announcement or not.

NOTE: Click on the "Add Announcement" button if you have multiple announcements related to the recruitment (i.e., DE, MP, DH, or Other).

Attaching Documents to WiTS Actions

It is a best practice to attach the recruitment case file and any other related, non-sensitive, documents to the WiTS action. For information on how to attach documents to WiTS actions, please see the *QRG – Attachments in WiTS.*

Examples of Appropriate Documents to Attach to Recruitment Actions

- Fax Cover Sheet,
- Vacancy Case File Checklist,
- Pre-recruitment Worksheet,
- SF-39,
- Capital HR Job Requisition or SF-52,
- Assessment Approval (for unique positions),
- Job Analysis,
- USA Staffing Assessment tool for modifications,
- Selective Factor Justification (if applicable),
- OF-8(s) and Position Descriptions,
- SME documentation (if applicable),
- Term or Temporary Justification (if applicable), and,
- Any other documents that do not contain Personally Indefinable Information (PII).

WiTS Tip: If a document contains PII and you need to attach it to the WiTS action, please scrub the sensitive information from the document and re-scan it. You can also use the Redaction feature in Adobe Professional, if you have the software.

➢ **Communication Point**

When the vacancy is ready for IC review/approval, the Branch HRS has the option to select "Send Rev/App Email" to send an email to the AO and/or Selecting Official stating that the vacancy announcement, assessment questions, etc. are ready for their review.
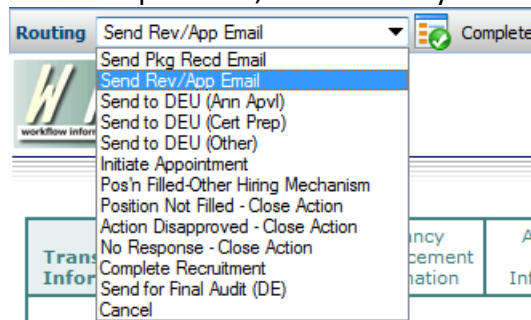
These documents can be attached to the WiTS action and will be sent along with the email.

DE Vacancy Announcements and Working with the CSD DEU

The Client Services Division, Delegated Examining Unit (CSD DEU) is responsible for approving DE vacancy announcements, issuing DE certificates, auditing DE recruitment cases, and approving DE selections. The Branch HRS must send the WiTS recruitment action to the CSD DEU for vacancy approval, certificate issuance, and final audit.

Routing Actions to the CSD DEU for Vacancy Approval

The Branch HRS enters the information related to the vacancy announcement(s) on the Vacancy Announcement Information tab. When the Branch HRS selects 'All Sources' or 'DE Only' as the 'Area of Consideration', drop-down menus for the Delegated Examining Human Resources Specialist (DE HR Specialist) and Delegated Examining Quality Reviewer (DE Quality Reviewer) appear. The Branch HRS is required to select a DE HR Specialist and a DE Quality Reviewer, and complete all of the information related to the vacancy announcement(s) except the posting, opening, and closing dates prior to sending the action to the CSD DEU for vacancy approval.

The following fields are required before sending the WiTS recruitment action to the CSD DEU for vacancy approval:

- All of the fields on the Transaction Information tab (Except: Date Complete Package Received)
- All of the fields on the Pre-recruitment Information tab
- All of the fields on the Vacancy Announcement Information tab (Except: Date Announcement Posted; Opened; Closed; and Cancelled).

Vacancy Announcement Information tab

- The Branch HRS will leave the "Date Complete Package Received", "Date Announcement Posted", "Date Announcement Opened", and "Date Announcement Closed" fields blank until the CSD DEU has approved the announcement and returned the action.

- Only members of the CSD DEU can edit the "Case Returned Comments" and "Selective Placement Factor Comments" fields.

WiTS Tip: When the Branch HRS has prepared the vacancy announcement(s) and is ready for the CSD DEU to review and approve, he or she selects "Send to DEU (Ann Appvl)" to send the action to the CSD DEU. This must be done in real-time as this action sets the 'Date Sent to DEU' field.
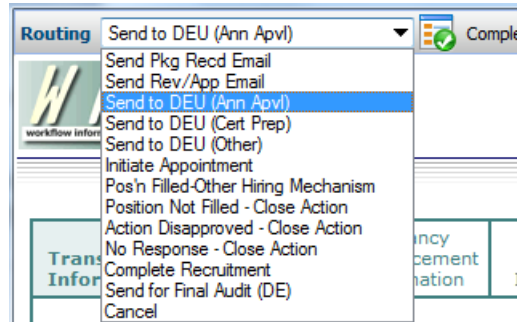
WiTS sends an email to the Branch HRS, with a cc to the DE Quality Reviewer. The action is then sent to the DEU worklist.

CSD DEU Vacancy Announcement Review/Approval

Upon receipt of the WiTS recruitment action, the DE Quality Reviewer has the following options:

1. **Approve the announcement**

In this case, the Branch HRS will receive an email stating that the announcement has been approved by the DE Quality Reviewer and is ready to be posted. WiTS will return the action to the Branch HRS with the 'Date Announcement Approved by DEU' field completed.

2. **Return the Action to the Branch**

In this case, the Branch HRS will receive an email stating that the action is being returned to them and giving them the reason (for example, it was sent in error, it needs extensive revision before it can be approved, etc.). WiTS will return the action back to the Branch HRS.

3. **Mark the action as 'Pending Selective Placement Factor Review'**

In this case, the Branch HRS will receive an email stating that the action is being placed in a pending status because the announcement contains a Selective Placement Factor and needs to be reviewed by the DEU Chief. The WiTS action will remain with the DEU. An additional email will be sent to the Branch HRS with the DEU Chief's decision. The WiTS action will be returned to the Branch HRS when the vacancy, as a whole, is approved.

Notification of a DE Announcement Closing

One day prior to the DE announcement closing, the DE HR Specialist, the DE Quality Reviewer, Branch Team Leader, and the Branch HRS will receive an auto-generated email at 6:00am, informing all recipients of the closing date of the announcement.

Sending the Recruitment Action for CSD DEU Certificate Issuance

After the DE Quality Reviewer has approved the DE announcement(s), and the WiTS action has been sent back to the Branch HRS, the Branch HRS will post the announcement in the staffing system, and complete the '*Date Complete Package Received*', '*Date Announcement Posted*', '*Date Announcement Opened,*' and '*Date Announcement Closed*' fields.

The Branch HRS will send the action back to the CSD DEU no later than the day before the announcement closes, by selecting 'Send to DEU (Cert Prep)':
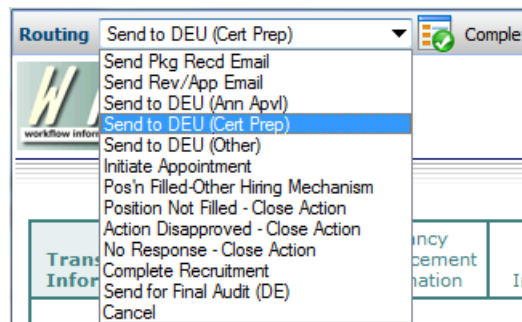
WiTS Tip: Because work on All-Sources recruitments is done by the CSD DEU and the CSD Branches in parallel, there are times when Branch staff will need to make updates to the WiTS form while the actions are 'with' the CSD DEU. For information on how to access actions at the same time as the CSD DEU, CSD Branch staff should reference the *QRG - Accessing/Updating Actions That Are with the CSD DEU*.

Applicant Rating Information Tab

The Applicant Rating Information tab is meant to collect data related to the vacancy announcement(s)' applicants. Some fields are reserved for the CSD DEU when the announcement type is DE. These fields will be 'grayed out' to non-CSD DEU staff.

Announcement Number: Select an announcement number from the drop down menu. The list of available announcements is populated from the Vacancy Announcement Tab.

Evaluation Method:
- *Basic Quals*: *Select this option when the applicant pool is only being rated for basic qualifications (e.g., Direct Hire or Title 42 announcements).*
- *Traditional: Select this option for announcements covered by the* NIH Merit Promotion Plan *where the applicant pool will not be rated using Category Rating Procedures.*
- *Category Rating: Select this option for any announcement where the applicant pool will be placed into categories as defined in the HHS Category Rating Policy.*
- *Phasing: Select this option for announcements where the rating process is carried out through a series of stages (e.g., Structured and Rated Interviews).*

Rater: Select HRS (Branch HR Specialist), DEU (DEU HR Specialists), QRB (Qualifications Review Board) and/or SME (Subject Matter Expert).

Total Number of Applicants: Enter the total number of applicants to the vacancy announcement.

Total Number of Qualified Applicants: Enter the total number of applicants to the vacancy announcement that met the basic qualifications. NOTE: *If an applicant is qualified for more than one*

grade or series, that applicant should only be counted once. Specialist should use the Applicant Notifications and Roster Reports to gather the total number of qualified applicants.

Total Number of Referred Applicants: Enter the total number of applicants to the vacancy announcement that were referred. NOTE: *If an applicant is referred on more than one certificate, that applicant should only be counted once. Specialist should use the Applicant Notifications and Roster Report to gather the total number of referred applicants.*

Date Minimum Quals Completed: Enter the date that the review of all applicants for minimum qualifications was completed.

Date Apps to SME/QRB: If applicable, enter the date that the applications were forwarded to the Qualifications Review Board (QRB) or Subject Matter Expert (SME) for review.

Date Apps Rec'd from SME/QRB: If applicable, enter the date that the review of the applications by the QRB or SME was completed.

Date Applicants Notified of Elig/Qual Status: Enter the date that the application pool was notified of their "qualified / not qualified or eligible / ineligible" status via the staffing system. This is the date, for HHS Careers (USA Staffing) announcements, that the Referral Letter, Notification Letter, Notice of Results (NOR), Cancellation Letter was sent. *Specialist should use the Applicant Notifications Report to gather this information.*

Date Applicants Notified of Referral Status: Enter the date that the majority of the applicant's were notified (emailed) of their "referred / not referred" status in the staffing system. This is the date, for HHS Careers (USA Staffing) announcements, that the Referral Letter, Notification Letter, Notice of Results (NOR), or Cancellation Letter was sent. *Specialist should use the Applicant Notifications Report to gather this information.*

WiTS Tip: Click on the 'Add Applicant Rating' button to complete this information for any additional vacancy announcements related to the recruitment. Use the 'Delete' checkbox to delete a block if needed.

WiTS Tip: When the announcement type is DE, the Branch HRS must complete the "Date Applicants Notified of Elig/Qual Status", "Date Applicants Notified of Referral Status", "Date Apps to SME/QRB" and "Date App Evaluation Completed By SME/QRB". The CSD DEU will complete the remainder of the fields.

WiTS Tip: For HHS Careers (USA Staffing) vacancies, click on the "View Applicant Roster" or "View Applicant Notifications" links to obtain a roster of your applicant pool, or a report of the notifications and referral status of your applicant pool.   WiTS uses the VIN to generate these reports so ensure that the VIN is accurate.

Certificate Information Tab

The *Certificate Information* tab is meant to collect data related to the certificates issued for the vacancy announcement(s).

Completing the Certificate fields

Who should complete the fields on the Certificate Information Tab
- *Non-DEU Certs*—indicates that the Branch HR Specialist should complete this field for non-DEU certificates only.
- *CSD DEU*—indicates that the field is reserved for members of the CSD DEU when the certificate is 'DE' or 'NC-DE.'
- *Branch HRS*—indicates that the Branch HRS, no matter the certificate type, should always complete the field.

Announcement Number: *(Non-DEU Certs)* Select an announcement number from the drop down menu. The list of available announcements is populated from what was entered on the Vacancy Announcement Tab.

Cert Issued? *(Non-DEU Certs)* Indicate whether the certificate was issued. *For announcements where a certificate is not issued, select the Announcement Number and note the 'Cert Issued' field as 'No.' This will let WiTS know that a certificate was not issued from this announcement. This will stop certificate issuance reminder emails and remove the announcement from your dashboard. Even if there are no certificates issued, DE Recruitment actions must be sent to the DE for Final Audit.*

Certificate Type: *(Non-DEU Certs)* Select the type of certificate (DE, NC-DE, MP, NC-MP, DH, or Applicant List). This list is dynamic based on the Announcement Type.

Certificate Number: *(Non-DEU Certs)* Enter the certificate number. Change the certificate number if you issue a supplement or amendment—do not create another certificate block.

Position Title, **Pay Plan, Series, Grade:** *(Non-DEU Certs)* Select the position information related to the certificate. The drop down lists for position title, pay plan, and series are populated from what was entered on the Vacancy Announcement Tab. The grade field is loose—meaning you will have to select the grade for the certificate.

Duty Location: *(Non-DEU Certs)* Select the duty location for which the certificate was issued.

Date Certificate Issued: *(Non-DEU Certs)* Enter the date the certificate was issued. Do not edit this date if you issue a supplement or amendment.

Date 10-Pt File Checked: *(CSD DEU)* This field is reserved for the CSD DEU and only applies to DE announcements. Leave this field blank.

Date Internal Review Completed: *(Non-DEU Certs)* Enter the date that the CSD Team Leader (or other reviewer) completed a quality review of the certificate.

Preference Eligibles Within Reach: *(Non-DEU Certs)* Indicate whether or not any preference eligibles were within reach on the certificate. This applies to non-DEU certificates as well as DEU certificates.

Date Certificate Expires: *(Non-DEU Certs)* Enter the date the certificate expires, which is typically 60 days after the date certificate issued. *Ensure to update the Proposed Effective Date with the latest certificate expiration date.*

Date Certificate Sent to SO: *(Branch HRS)* Enter the date the certificate was sent to the Selecting Official. If you issue a supplement or amendment, do not edit this date. NOTE: *For selections only—the date difference between Date Certificate Sent to SO and Date of Hiring Decision is used to measure IC hiring timelines. For 1st Selections, on all reports, these dates derive from the Recruitment form and not the Appointment form.*

Certificate Extended? *(Branch HRS)* Indicate whether the certificate was extended beyond the original expiration date.

New Cert Expiration Date: *(Branch HRS)* If the certificate was extended, enter the new expiration date.

Cert Used? *(Branch HRS)* Indicate whether the certificate was used *("Used" meaning that at least one selection was made from the certificate). This includes any shared certificate or additional selection activity. If the certificate is shared and a selection is made, this field must be updated.* NOTE: *If the selectee(s) declines the position, the certificate is still considered to be 'Used.'*

Selection Made? *(Branch HRS)* Indicate whether *at least one* selection was made from the certificate. *This includes any shared certificate or additional selection activity. If the certificate is shared and a selection is made, this field must be updated.* NOTE: *If the selectee(s) declines the position, a selection is still made.*

Cert Returned Unused Reason: *(Branch HRS)* If the certificate was returned unused, select the reason. *This includes any shared certificate or additional selection activity. If a certificate is shared with many Selecting Officials, and the certificate is not used, select the unused reason given by the Initiating Selecting Official.*

Cert Returned Unused Reason - Other: *(Branch HRS)* Required field when "Other" is the unused reason. Enter the reason why the certificate was unused. *This includes any shared certificate or additional selection activity. If a certificate is shared with many Selecting Officials, and the certificate is not used for other reasons, enter the other unused reason given by the Initiating Selecting Official.*

Action Taken: *(Branch HRS)* Indicate the action taken on the certificate, *not the Recruitment action as a whole. This includes any shared certificate or additional selection activity.*

- o **Hire** *means that at least one individual (on the certificate) was selected and accepted the position.*
- o **Cancelled** *means that the certificate was rescinded or cancelled.*
- o **Not Filled** *means no selections (on the certificate) were made or no selectees accepted the position.*

Date of Hiring Decision: *(Branch HRS)* Enter the date that the Selecting Official made the hiring decision. This is the date that the Selecting Official annotated on the certificate(s)/applicant list(s) to select or not select an individual. *In cases where the Selecting Official does not sign the certificate(s)/applicant list(s), use the date that the Selecting Official made the decision to select or not select an individual from a certificate(s)/applicant list(s).* NOTE: *For selections only—the date difference between Date Certificate Sent to SO and Date of Hiring Decision is used to measure IC hiring timelines. For 1st Selections, these dates derive from the Recruitment form and not the Appointment form.*

Date Hiring Decision Rec'd in HR: *(Branch HRS)* Enter the date that OHR/CSD received the hiring decision and in cases of selections, authorized the HR Specialist to make the tentative job offer. *In cases where the Selecting Official does not sign the* certificate(s)/applicant list(s)*, use the date that the Selecting Official returned the Hiring Decision (e.g., via email, signed copy, or other approved method) and authorized the HR Specialist to make the tentative job offer.* Do not indicate the date any Shared Selecting Official returned their Hiring Decision.

Date Final Applicant Statuses Set: *(Branch HRS)* Enter the date the applicants on the certificate were notified, via email, of their disposition status (including the cancellation of the announcement or certificate) regarding selection or non-selection for the certificate.

Date Cert Returned to DEU for Final Closeout Audit: *(CSD DEU)* This field is reserved for the CSD DEU and only applies to DE announcements.   Leave this field blank.

Date Audit Completed: *(CSD DEU)* This field is reserved for the CSD DEU and only applies to DE announcements.   Leave this field blank.

Audit Comments: *(CSD DEU)* This field is reserved for the CSD DEU and only applies to DE announcements. Leave this field blank.

 WiTS Tip: Click on the 'Add Certificate' button to add additional certificates. Note: When you add a certificate, the information that was entered in the first certificate block will be copied. Please make sure you make changes where appropriate. You can enter up to 1,000 certificates.

WiTS Tip: Certificate numbers cannot be duplicated across all WiTS actions.

WiTS Tip: Certificates cannot be deleted if an Appointment has been made using that certificate.
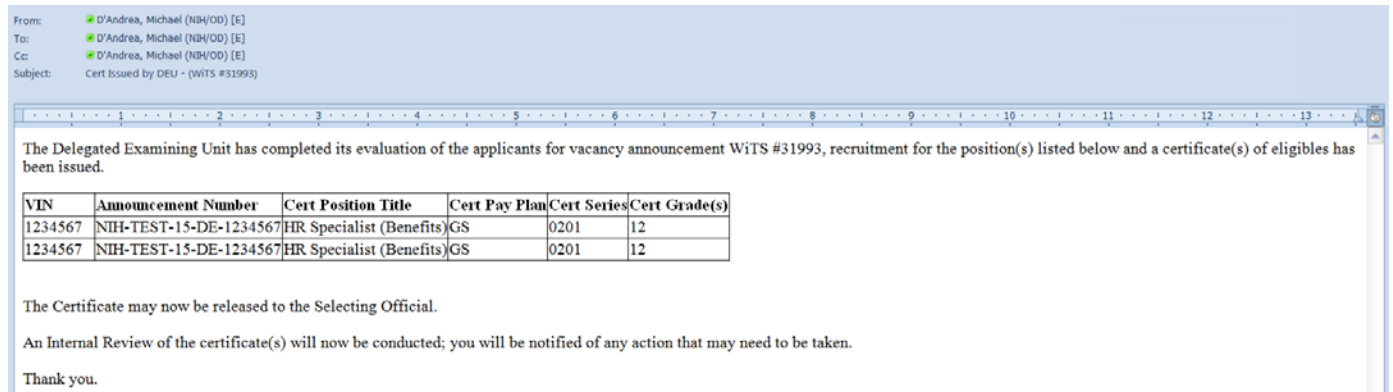
WiTS Tip: Any edits made to a certificate number on the Recruitment form, will automatically update any associated certificate used on an Appointment form.

WiTS Tip: For supplemental or amended certificates, simply edit the certificate number as appropriate. Do not issue a new certificate and do not edit the original 'Date Certificate Issued', 'Date Cert Sent to SO', 'Date of Hiring Decision', and 'Date Hiring Decision Rec'd in HR' fields. Changing the certificate dates will inaccurately report on certificate issuance SLAs.

WiTS Tip: Declinations: If the initial selectee declines the position and another individual is selected, do not edit the original 'Date of Hiring Decision' and 'Date Hiring Decision Rec'd in HR' fields. Editing these fields using the subsequent selectee's dates will inaccurately report on Hiring Decision SLAs. In these cases, leave the original dates and note the subsequent selection as an "Addition Selection" or "Shared Certificate" (as appropriate) on the Appointment form. On the Appointment form, enter the date that you re-sent the certificate to the Selecting Official and their Hiring Decision dates.

DEU Certificate Issuance by the CSD DEU

When the certificate(s) is ready to be released to the Branch HRS, the DE HR Specialist issues the certificate in the Staffing System, then routes the recruitment action back to the Branch HRS, then an email is sent to the Branch HRS with a cc to the DE HR Specialist:

From:	D'Andrea, Michael (NIH/OD) [E]
To:	D'Andrea, Michael (NIH/OD) [E]
Cc:	D'Andrea, Michael (NIH/OD) [E]
Subject:	Cert Issued by DEU - (WiTS #31993)

The Delegated Examining Unit has completed its evaluation of the applicants for vacancy announcement WiTS #31993, recruitment for the position(s) listed below and a certificate(s) of eligibles has been issued.

VIN	Announcement Number	Cert Position Title	Cert Pay Plan	Cert Series	Cert Grade(s)
1234567	NIH-TEST-15-DE-1234567	HR Specialist (Benefits)	GS	0201	12
1234567	NIH-TEST-15-DE-1234567	HR Specialist (Benefits)	GS	0201	12

The Certificate may now be released to the Selecting Official.

An Internal Review of the certificate(s) will now be conducted; you will be notified of any action that may need to be taken.

Thank you.

After the Branch HRS receives this email from the CSD DEU, they should release/send the certificate(s) to the Selecting Official.

Closing WiTS Recruitment Actions

The Initiating HR Specialist (person noted on the Recruitment action) is responsible for gathering all applicable information from any shared certificate and additional selection activity, and updating the WiTS recruitment action.

The Initiating HR Specialist will complete their recruitment action or send the action to the DEU for final audit when all of the certificates have expired, all Hiring Decisions (i.e., selections or non-selections) have been returned by the Selecting Official(s) (to include any shared certificates), and the WiTS action has been accurately updated, specifically the Certificate Information tab.

Options for Closing a Recruitment Action

Send for Final Audit (DE)

If one of the announcement types in the WiTS action is "DE" then the Branch HRS must send the action to the CSD DEU for final audit. This is done when all of the certificates have expired, all Hiring Decisions (i.e., selections or non-selections) have been returned by the Selecting Official(s) (to include any shared certificates), and the WiTS action has been accurately updated, specifically the Certificate Information tab. *Even if there are no certificates issued, DE Recruitment actions must be sent to the DE for Final Audit.*

The Branch HRS will send the WiTS action back to the CSD DEU for final audit by selecting 'Send for Final Audit (DE)':
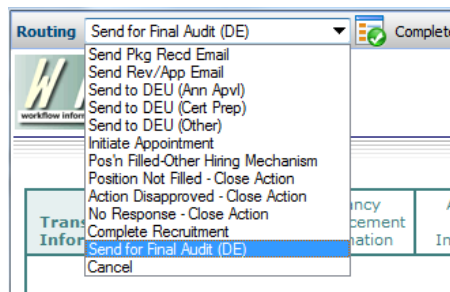
WiTS Tip: Sending the Recruitment to the CSD DEU for Final Audit does not close the Recruitment action, but completes the process for the Branch.

WiTS Tip: Once the Recruitment action is sent to the CSD DEU for Final Audit, it cannot be returned to the Branch. Please see the Accessing/Updating Actions With the DEU (for CSD Branches) guide for instructions on how to access and update actions while they are with the CSD DEU. Additionally, the CSD Branch Chief, CSD Team Leader, CSD HR Specialist, CSD HR Assistant, and Final Authorizer fields will be locked and cannot be changed.

Complete Recruitment

For non-DEU recruitment actions: Select this option when all of the certificates have expired, all Hiring Decisions (i.e., selections or non-selections) have been returned by the Selecting Official(s) (to include any shared certificates), and the WiTS action has been accurately updated, specifically the Certificate Information tab.
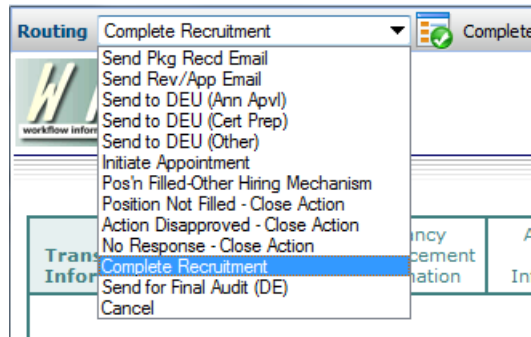
An email notification is sent to the HR Specialist notifying them that the WiTS action has been completed.

NOTE: Even after a Recruitment action has been closed in WiTS, related Appointment actions can still be initiated and linked to the recruitment by entering the Recruitment WiTS #.

No Response – Close Action

Select this option when you (the Branch HR Specialist) have received no communication or follow-up on the recruitment action for 90 consecutive days during the pre-recruitment phase of the action. *Please consult your Team Leader or Branch Chief before using this option.* This will close (not cancel) the action and send it to Archives.
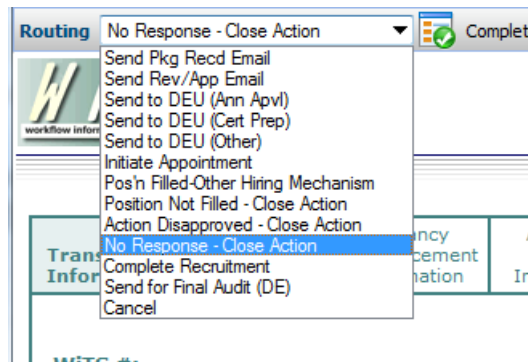
An email is sent to the AO, Selecting Official, and Supervisor advising them that the action was closed due to no response, and that the WiTS action is being closed.

Appendix 1: Reminder Emails

Throughout the recruitment process, WiTS sends reminder emails to HR staff as well as to IC customers based on certain dates and information entered on the Recruitment form. These emails are intended to keep the process moving in a timely fashion, to help ensure that we meet our mutual hiring reform goals, and to provide reminders. Reminder emails are calculated using calendar days.

Active Recruitment Action (Pre-Recruitment) Email

To provide a way for CSD Leadership to monitor and track timelines within the Pre-Recruitment Stage, reminder emails are sent:

Email Calculation: ('Date Entered to 'Date Complete Package Received')

Email Exclusions:
- If the 'Date Complete Package Received' is complete
- If the Recruitment action is closed or cancelled
- If the Recruitment action is Title 42 or Title 42 CRS
- If any of the following Action Statuses are selected: "Hold – Shared Certificate/Recruitment in Progress", "Applicants Under Review – Program SME", "Applicants Under Review – QRB", or "Cert Issued to Selecting Official"

*On **Day 45** from the Date Entered if the 'Date Complete Package Received' field is not complete*
To: CSD Team Leader & CC: CSD HR Specialist (CSD HRS) and Administrative Officer

*On **Day 60** from the Date Entered if the 'Date Complete Package Received' field is not complete*
To: CSD Branch Chief & CC: CSD Team Leader, Administrative Officer, and CSD HRS

*On **Day 75** from the Date Entered if the 'Date Complete Package Received' field is not complete*
To: Responsible CSD Deputy Director & CC: CSD Branch Chief, CSD Team Leader, Administrative Officer, and CSD HRS

*On **Day 90** from the Date Entered if the 'Date Complete Package Received' field is not complete*
To: CSD Director & CC: Responsible CSD Deputy Director, CSD Branch Chief, CSD Team Leader, and CSD HRS

Subject: Action Needed - Move Recruitment Action Forward - Program Director GS-0601-15
Importance: High

Suggested Action: Please contact Ross Geller for more information and to move the recruitment process forward.

Details: WiTS Recruitment Action 123456 has been active for 45 days in the pre-recruitment stage. Please reference the table(s), comments, and pre-recruitment status below for specific information related to this recruitment action.

Current Status	Incomplete Package Received by HR / Waiting for missing documents
Initiated	12/19/13
WiTS#	123456
Submitted By/Org	JOEY TRIBBIANI/ NCI CBIIT
Admin Code	HNT0D
Position Title	Program Director
Pay Plan/Series/Grade(s)	GS/1234/14
CAN	12345678
SO	PHOEBE BUFFAY
AO	JOEY TRIBBIANI

Date of Pre-Recruitment Meeting: 01/02/14
Date Pre-Recruitment Form Signed: 12/18/13
Comments:
02/20 – Received job analysis; updating documents 01/31 - Drafting job analysis

Scheduled Reminders:
- 45 Days: 02/02/2014
- 60 Days: 02/17/2014
- 75 Days: 03/04/2014
- 90 Days: 03/19/2014

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Post Vacancy Announcement Email

By the 2nd day after the 'Date Complete Package Received' field is complete, the HR Specialist should post the announcement and complete the 'Date Announcement Posted' field.

Email Calculation: ('Date Complete Package Received' to 'Date Announcement Posted')

Email Exclusions:
- If the 'Date Announcement Posted' field is complete
- If the Recruitment action is closed or cancelled

If the announcement has not been posted:
- **on day 2** – To: CSD HRS
  - CC: CSD Team Leader and CSD Branch Chief

Subject: Action Needed – Post Vacancy Announcement – IT Specialist GS-1234-11, 12, 13
Importance: High

Suggested Action: Please post the announcement and complete the **"Date Announcement Posted"** field in the WiTS Recruitment form.

Details: Action is needed on WiTS # 123456 in order to meet the OPM hiring Reform Goals. The vacancy announcement(s) for the positions listed below should be posted by close of business today. Please reference the table below for specific information related to this action.

Vacancy #	NIH-OHM-14-MP-1234567
WiTS#	123456
Submitted By/Org	TOPANGA LAWRENCE / OHM
Admin Code	HNM12
Position Title	IT Specialist
Pay Plan/Series/Grade(s)	GS/1234/11, 12, 13

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Pre-Announcement (DEU) Closing Email

Before a DE announcement closes, the HR Specialist should route the Recruitment action to the DE Unit for certificate preparation. Therefore, WiTS sends a reminder email one day before the closing date of the announcement.

Email Calculation: ('Date Announcement Closed' to 'Today's Date)

Email Exclusions:

- If the announcement is not DE
- If the Recruitment action is completed or cancelled

  o **One day prior to the announcement closing** – To: CSD HRS and CSD Team Leader
    - CC: DEU HRS and DEU Quality Reviewer

Subject: Route Recruitment Action to DEU - Program Specialist GS-0301-09

Suggested Action: Please route the Recruitment action (If it has not been done already) to the DE Unit by selecting 'Send to DEU (Cert Prep)' from the routing menu by the close of business of 10/03/14.

Details: Vacancy Announcement # Program Specialist -NCX-14-1216215 for Recruitment Action WiTS #1234567, posted by Nelson Cruz will close tomorrow. In order for the DE Unit to issue the certificate(s) in WiTS, the Recruitment action must be routed to them. Please reference the tables below for specific information related to this action.

Vacancy #	Program Specialist -NCX-14-1216215
WiTS #	1234567
Submitted By/Org	BUCK SHOWALTER / NCX OD
Admin Code	NCZ12
Position Title	Program Specialist
Pay Plan/Series/Grade(s)	GS/0301/09

VIN	1234567
Total # of Applicants*	100
Total # of Eligible Applicants*	75
Total # of Claimed Veterans*	20

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Issue Certificate (DEU) Email

For DE certificates, the DE HR Specialist should issue the certificate within 11 days of the announcement closing.

> **Email Calculation:** ('Date Announcement Closed' to 'Date Certificate Issued')

> **Email Exclusions:**
> - If the 'Date Certificate Issued' field is complete
> - If the Recruitment action is closed or cancelled
> - If there is a date in the 'Date Announcement Cancelled' field
> - If the announcement number is selected on the Certificate Information tab and the 'Cert Issued' field = 'No'

If the certificate has not been issued:
- **on day 8** – To: DEU HRS
  - CC**:** DEU Chief, Deputy DEU Chief
- **on day 10** – To: DEU Chief
  - CC: CSD Branch Chief, CSD HRS, CSD Team Leader, DEU HRS and DEU Deputy Chief

---

Subject: Action Needed – Issue Certificate – Health Science Policy Officer GS-0601-15

Suggested Action: Please issue the certificate in the staffing system, complete the "Date Cert Issued" field(s) in the WiTS Recruitment form and route the WiTS action back to the Branch by 09/30/14.

Details: Action is needed on WiTS # 123456 in order to meet the OHR Service Level Agreement (SLA). Please reference the table below for specific information related to this action.

Vacancy #	NIH-NIMH-DE-14-123456
WiTS #	123456
Submitted By/Org	BRUCE HORNSBY / NCH OD
Admin Code	HNQP12
Position Title	Health Science Policy Officer
Pay Plan/Series/Grade(s)	GS/0601/15

VIN	1234567
Total # of Applicants*	44
Total # of Eligible Applicants*	27
Total # of Claimed Veterans*	2

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Issue Certificate (DEU) SLA Exceed Email

For DE certificates, the DE HR Specialist should issue the certificate within 11 days of the announcement closing. If the certificate was not issued within 11 days, the service level agreement was missed**.**

Email Calculation: ('Date Announcement Closed' to 'Date Certificate Issued')

Email Exclusions:
- If the 'Date Certificate Issued' field is complete
- If the Recruitment action is closed or cancelled
- If there is a date in the 'Date Announcement Cancelled' field
- If the announcement number is selected on the Certificate Information tab and the 'Cert Issued' field = 'No'

If the certificate has not been issued:

- **on day 12** – To: CSD Deputy Director (IOOB)
  - CC: CSD Branch Chief, CSD HRS, CSD Team Leader, DEU HRS and DEU Chief and DEU Deputy Chief
- **on day 14** – To: Deputy Director that is assigned to the branch
  - CC: CSD Deputy Director (IOOB), CSD Branch Chief, CSD HRS, CSD Team Leader, DEU HRS and DEU Chief and DEU Deputy Chief.

Subject:	Action Needed – Issue Certificate (SLA Exceeded) -- Health Science Policy Officer GS-0601-15

Suggested Action: Please issue the certificate in the staffing system, complete the "Date Cert Issued" field(s) in the WiTS Recruitment form and route the WiTS action back to the Branch by 09/30/14.

Details: Action is needed on WiTS # 123456 because an OHR Service Level Agreement (SLA) has been exceeded (**the certificate should have been issued to the CSD Branch by 10/03/14**). Please reference the table below for specific information related to this action.

Vacancy #	NIH-NIMH-DE-14-123456
WiTS #	123456
Submitted By/Org	BRUCE HORNSBY / NCH OD
Admin Code	HNQP12
Position Title	Health Science Policy Officer
Pay Plan/Series/Grade(s)	GS/0601/15

VIN	1234567
Total # of Applicants*	44
Total # of Eligible Applicants*	27
Total # of Claimed Veterans*	2

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Send Certificate (DEU) to Selecting Official Email

For DE certificates that have been issued to the Branch, the Branch HR Specialist should send the certificates to the Selecting Official within 16 days of the announcement closing.

Email Calculation: ('Date Announcement Closed' to 'Date Certificate Sent to SO')

Email Exclusions:
- If the 'Date Certificate Sent to SO' is complete
- If the 'Certificate Issued' field is not complete
- If the Recruitment action is closed or cancelled
- If there is a date in the 'Date Announcement Cancelled' field
- If the announcement number is selected on the Certificate Information tab and the 'Cert Issued' field = 'No'

If the certificate(s) has been issued to the Branch, but has not been sent to the Selecting Official:

- **on day 14** – To: CSD Branch Chief
  CC: CSD Team Leader and CSD HRS

Subject: Action Needed – Send Certificate to Selecting Official – Administrative Officer GS-0341-15

Suggested Action: Please send the certificate(s) to the Selecting Official and complete the **"Date Certificate Sent to SO"** field(s) in the WiTS Recruitment form.

Details: Action is needed on WiTS # 123456 in order to meet the OHR Service Level Agreement (SLA). The certificate(s) for WiTS # 123456 should be sent to the Selecting Official by 10/05/14. Please reference the table below for specific information related to this action.

Vacancy #	NIH-NCX-MP-14-1209083
WiTS #	123456
Submitted By/Org	ADAM JONES / NCZ OD
Admin Code	NCZ123
Position Title	Administrative Officer
Pay Plan/Series/Grade(s)	GS/0341/15

VIN	1234567
Total # of Applicants*	132
Total # of Eligible Applicants**	122
Total # of Applicants Claiming Veterans Preference***	42

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Send Certificate (DEU) to Selecting Official SLA Exceed Email

For DE certificates, the Branch HR Specialist should send the certificate to the Selecting Official within 16 days of the announcement closing. If the certificate was not sent in 16 days, the service level agreement was missed.

Email Calculation: ('Date Announcement Closed' to 'Date Certificate Sent to SO')

Email Exclusions:
- If the 'Date Certificate Sent to SO' is complete
- If the Recruitment action is closed or cancelled
- If there is a date in the 'Date Announcement Cancelled' field
- If the announcement number is selected on the Certificate Information tab and the 'Cert Issued' field = 'No'

For DE certificates that have not been sent to the Selecting Official within 16 days:

- **on day 17** – To: CSD Director
  - CC: CSD Deputy Director (IOOB), CSD Deputy Director that is assigned to the Branch, CSD Branch Chief, CSD HRS, CSD Team Leader, DEU HRS and DEU Chief and DEU Deputy Chief

---

Subject: Action Needed – Send Certificate to Selecting Official (SLA Exceeded) – Administrative Officer GS-0341-15

Suggested Action: Please send the certificate(s) to the Selecting Official and complete the "**Date Certificate Sent to SO**" field(s) in the WiTS Recruitment form.

Details: Action is needed on WiTS # 123456 in order to meet the OHR Service Level Agreement (SLA). **The certificate(s) for WiTS # 123456 should have been sent to the Selecting Official on 10/05/14.** Please reference the table below for specific information related to this action.

Vacancy #	NIH-NCX-MP-14-1209083
WiTS #	123456
Submitted By/Org	ADAM JONES / NCZ OD
Admin Code	NCZ123
Position Title	Administrative Officer
Pay Plan/Series/Grade(s)	GS/0341/15

VIN	1234567
Total # of Applicants*	132
Total # of Eligible Applicants**	122
Total # of Applicants Claiming Veterans Preference***	42

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Send Certificate (MP or DH) to Selecting Official Email

For MP or DH certificates, the CSD HR Specialist should send the certificate to the Selecting Official within 16 days.

Calculation: ('Date Announcement Closed' to 'Date Certificate Sent to SO')

Exclusions:
- If the 'Date Certificate Sent to SO' is complete
- If the Recruitment action is closed or cancelled
- If there is a date in the 'Date Announcement Cancelled' field
- If the announcement number is selected on the Certificate Information tab and the 'Cert Issued' field = 'No'
- If the announcement type is 'Other'

For MP or DH certificates that have not been sent to the Selecting Official within 16 days:

- **on day 10** – To: CSD HRS
- **on day 14** – To: CSD HRS, CSD Team Leader, and CSD Branch Chief
  - CC: CSD HRS
- **on day 17** – To: Deputy Director that is assigned to the branch,
  - CC: CSD HRS, CSD Team Leader, and CSD Branch Chief

Subject: Action Needed – Send Certificate to Selecting Official – Administrative Officer GS-0341-15

Suggested Action: Please send the certificate(s) to the Selecting Official and complete the "**Date Certificate Sent to SO**" field(s) in the WiTS Recruitment form.

Details: Action is needed on WiTS # 123456 in order to meet the OHR Service Level Agreement (SLA). The certificate(s) for WiTS # 123456 should be sent to the Selecting Official by 10/05/14. Please reference the table below for specific information related to this action.

Vacancy #	NIH-NCX-MP-14-1209083
WiTS #	123456
Submitted By/Org	ADAM JONES / NCZ OD
Admin Code	NCZ123
Position Title	Administrative Officer
Pay Plan/Series/Grade(s)	GS/0341/15

VIN	1234567
Total # of Applicants*	132
Total # of Eligible Applicants**	122
Total # of Applicants Claiming Veterans Preference***	42

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Tentative Job Offer Email

By the 2nd day after the Hiring Decision is returned by the IC, CSD HRS should make a tentative job offer. *This reminder email only applies to the Appointment action, and not the Recruitment form.*

Email Calculation: ('Date Hiring Decision Rec'd in HR to 'Tentative Job Offer Date)

Email Exclusions:
- If the 'Date of Tentative Job Offer' is complete
- If the Appointment action is missing a Related WiTS Recruitment number

If the tentative job offer has not been made:

- o **on day 2** – To: CSD HRS
  - CC: CSD Team Leader and CSD Branch Chief

Subject: Action Needed – Extend Tentative Job Offer – Biologist GS-1234-12
Importance: High

Suggested Action: Please extend the tentative job offer and complete the "Tentative Job Offer Date" field in the WiTS Appointment Form.

Details: Action is needed on WiTS # 123456 in order to meet OPM Hiring Reform Goals. A tentative job offer needs to be made (a voice mail message is acceptable) to the selected candidate by close of business today. Please reference the table below for specific information related to this action.

Vacancy #	NIH-OHM-DE-14-1234567
WiTS #	123456
Submitted By/Org	PHIL DUNPHY / OHM
Admin Code	HNM12
Position Title	Biologist
Pay Plan/Series/Grade(s)	GS/1234/12

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Official Job Offer Email

By the 2nd day after any additional approvals have been received, the HRS should make an official job offer.

Email Calculation: ('Date Approval Decision Rec'd in HR to 'Date of Official Job Offer')

Email Exclusions:

- If the 'Date of Official Job Offer' is complete
- If the 'Additional Approvals Rec'd in HR' field is blank

If the official job offer has not been made:

- o **on day 2** – To: CSD HRS
  - CC: CSD Team Leader and CSD Branch Chief

Subject: Action Needed – Extend Official Job Offer – Biologist GS-1234-11
Importance: High

Suggested Action: Please extend the official job offer to the selected candidate and complete the **"Official Job Offer Date"** field in the WiTS Appointment Form.

Details: Action is needed on WiTS # 123456 in order to meet OPM Hiring Reform Goals. An official job offer needs to be made (a voice mail message is acceptable) to the selected candidate by close of business today. Please reference the table below for specific information related to this action.

Notes:

- An Official Job Offer must be made within two calendar days of the 'Date Approval Decision Rec'd in HR' on the Approval Information tab. This Appointment action indicates that the approval decision was received in HR on 12/27/13.

- Selections from a Delegated Examining Unit announcement must be routed and approved by the CSD DEU before extending the official job offer.

Vacancy #	NIH-OHM-DE-14-123456
WiTS #	123456
Submitted By/Org	JON SMITH/ OHM
Admin Code	HNM12
Position Title	Biologist
Pay Plan/Series/Grade(s)	GS/1234/11

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Certificate Expiration Email (HRS)

On the morning of the 5th day before the certificate expiration date, a reminder email is sent to the HR Specialist.

Email Calculation: ('Date Certificate Expires' or 'New Cert Expiration Date' to Today' Date)

Email Exclusions:
- If the 'Cert Issued' field = 'No'
- If the Recruitment action is closed or cancelled

5 days before the certificate expiries:

  o **5 days before cert expires**
    - To: CSD HRS
      - CC: CSD HRS

Subject: Notice – Certificate Expiration – Mechanic WG-1234-10
Importance: High

Suggested Action:

- If you are extending this certificate, please enter the new expiration date on the WiTS Recruitment form.
- If you are not extending this certificate, and you have not already done so, please complete the audit process in HHS Careers (USA Staffing) and send the Disposition Letters to your applicant pool.
- If you need assistance auditing a certificate in HHS Careers (USA Staffing), please reference the Applicant Referral and Selection User Guide.
- For DE Announcements, be sure to send all required documents to the CSD DEU so that they can close out the case file. Remember that even if there is no selection, you must send final Disposition Letters to the applicants notifying them the status of their application.

Details: Your certificate WE-14-DEU-12345S0 will expire on 03/04/14. Please reference the table below for specific information related to this action.

WiTS#	123456
Certificate#	WE-14-DEU-12345S0
Certificate Issue Date	01/03/14
Certificate Expiration Date	03/04/14
Org/SAC	OHM, HNM12
Position Title	Mechanic
Pay Plan/Series/Grade	WG/1234/10

Hiring Decision Needed Email

By the 25th day after the cert is sent to the Selecting Official, the hiring decision is due back from the Selecting Official to meet the 25 day hiring goal. Therefore, on the morning of day 15 and 24, a reminder email is sent to the AO or other IC Contact and the Selecting Official with a copy to the HR Specialist. This email includes all outstanding certificates.

Email Calculation: ('Date Certificate Sent to SO' to 'Date of Hiring Decision')

Email Exclusions:

- If the 'Cert Issued' field = 'No'
- If the action type is 'Appointment'
- If the Recruitment action is closed or cancelled
- If the announcement type is 'Other'

15 and 24 days after the Date Certificate Sent to SO:

- To: Selecting Official and Administrative Officer (IC Contact)
- CC: CSD HRS

Subject: Action Needed - Hiring Decision Needed for Recruitment Action – Nurse GS-1234-11
Importance: High

Suggested Action: In order to meet hiring reform goals, your selection/non-selection of a candidate is due by the **Hiring Decision Date** identified below. Please contact Gloria Pritchett about your Hiring Decision as soon as possible.

Details: A decision (selection/non-selection) should be made by the Hiring Decision Date identified below to meet hiring reform goals. Failure to meet the hiring reform goal does not preclude you from making a decision as late as the certificate expiration date. **Please note, however, that if you do not make your selection/non-selection by the Hiring Decision Date, other selecting officials then become able to make a selection from that certificate.** Reference the table(s) below for specific certificate details and due dates.

WiTS#	123456
Certificate#	WE-14-DRH-12345SO
Date Cert Sent	01/28/14
Hiring Decision Due Date	02/22/14
Certificate Expiration Date	03/27/14
Org/SAC	OHM, HNM12
Position Title	Nurse
Pay Plan	GS
Series	1234
Grade	11

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Certificate Expiration Email (IC)

On the morning of the certificate expiration date, a reminder email is sent to the AO or other IC contact and the Selecting Official with a copy to the HR Specialist. *All outstanding certificates (i.e., where the 'Date Hiring Decision Rec'd in HR' field is blank) will be listed in one email.*

Email Calculation: ('Date Certificate Expires' or 'New Cert Expiration Date' to Today's Date)

Email Exclusions:
- If the 'Cert Issued' field = 'No'
- If the 'Date Hiring Decision Rec'd in HR' is complete
- If the Recruitment action is closed or cancelled
- If the announcement type is 'Other'

The morning of the certificate expiration:

- To: Selecting Official and Administrative Officer (IC Contact)
- CC: CSD HRS

Subject: Action Needed - Hiring Decision Needed Cert Expiring – Supervisor GS-1234-09
Importance: High

Suggested Action: Please contact Rachel Green regarding your Hiring Decision (selection/non-selection) or to request an extension.

Details: The certificate for the position listed below is set to expire. Please reference the table below for the expiration date and other details of this certificate.

WiTS#	123456
Certificate#	WE-14-MPP-12345S0
Certificate Issue Date	12/27/13
Certificate Expiration Date	02/27/14
Org/SAC	OHM, HN123
Position Title	Supervisor
Pay Plan/Series/Grade	GS/1234/09

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Feedback Requested Email

The email will be triggered the day after the HR Specialist updates the Recruitment action to indicate that a Hiring Decision has been made. If a Hiring Decision is not made (e.g., when there are no qualified applicants), then the email will be triggered the day after the HR Specialist completes or closes the Recruitment action.

The email is sent to the Selecting Official with a copy to the CSD HR Specialist. The email invites the Selecting Official to take a brief survey about their Recruitment experience.

Subject: NIH/OHR wants to know about your Biological Science Technician (Pharmacy) recruitment experience
Importance: High

Your valuable feedback is requested for the Technician (Pharmacy) GS-1234-09 vacancy that recently closed.

Please go to http://study.opm.gov/mss/ and answer a few questions about your experience with the recruitment process for this position. The survey should only take about five minutes of your time. This information will be used by The Office of Personnel Management (OPM) to measure NIH's success in meeting hiring reform goals.

Thank you.

Applicant Supporting Documentation Email

If the announcement is advertised in USA Staffing and the WiTS Recruitment action is updated accurately in real time, the Branch HR Specialist and DE HR Specialist (for DE announcements) will receive an email when an applicant submits a supporting document more than two days after the Date Announcement Closed.

Email Calculation: *Date Announcement Closed to Date Applicant Submitted Document* is greater than two days and the Date Announcement Closed is not greater than 60 days.*

Considerations and Troubleshooting:
- Date Announcement Closed, Announcement Type, and Announcement Number come from WiTS so this information must be accurate and updated in real time for the email to work properly.
- The VIN entered in the WiTS Recruitment form must match the VIN in the USA Staffing action for the email to work properly.

Business Rules of Email:

1. *DE Announcements (as indicated in WiTS):*
   - If the date the applicant submitted* the document is between 3 – 14 days after the announcement closing date, the Branch HRS and DE HRS will receive an email.
   - If the date the applicant submitted* the document is between 15 – 60 days after the announcement closing date, only the Branch HRS will receive an email.

2. *Non-DE Announcements (as indicated in WiTS):*
   - If the date the applicant submitted* the document is between 3 – 60 days after the announcement closing date, only the Branch HRS will receive an email.

3. *Email Expiration:*
   - If the applicant submits a document greater than 60 days after the announcement closing date, no email will be sent.

*Date Submitted: WiTS receives the Date Processed and not the Date Received from USA Staffing. HR Staff should use the Date Received to determine when the applicant actually submitted the document.

Document Type	Send to SM	Source	Original File Name	Received	Processed	Matched	Change to Doc Type	Modify
Cover Letter	☑	USAJOBS	cover letter	04/17/2012 01:32 PM	4/18/2012 12:04:47 AM	04/17/2012 01:35 PM		Modify
Other	☑	USAJOBS	resume	04/17/2012 01:32 PM	4/18/2012 12:04:46 AM	04/17/2012 01:35 PM		Modify
Resume	☑	USAJOBS		04/17/2012 01:32 PM	4/17/2012 1:32:31 PM	04/17/2012 01:32 PM		Modify
Transcript	☑	USAJOBS	transcripts	04/17/2012 01:32 PM	4/18/2012 12:04:47 AM	04/17/2012 01:35 PM		Modify

Sample Supporting Documentation Email:

Subject: Review Needed - Supporting Documentation Submitted After Announcement Close – Health Specialist GS-1234-12
Importance: High

Suggested Action: Please review the applicant(s) supporting documentation and take any action necessary.

Details: The following applicant(s) have submitted supporting documentation for Vacancy # NIH-OD-MP-14-1234567 which closed on 02/17/14. Please reference the tables below for specific information.

WiTS #	123456
Vacancy #	NIH-OD-MP-14-1234567
VIN	1234567
Date Announcement Closed	02/17/14

Applicant Name	MICHAEL MYERS
Document Type	Transcript
Date Document Processed*	02/25/14

*The 'Date Document Processed' is the date that the applicant's document was processed in USA Staffing, which may differ from the date submitted. Please reference the 'Date Received' in the USA Staffing system for the official date that the applicant's document(s) were submitted.

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Unaudited Certificate Email

WiTS sends reminder emails to ensure all certificates in HHS Careers (USA Staffing) are audited.

Email Calculation: The date that all certificates for the announcement, as noted in WiTS, expire to Today's date. For announcements with multiple certificates and expiration dates, WiTS will look for the latest certificate expiration date noted on the Recruitment form.

Email Exclusions:
- If all certificates in HHS Careers (USA Staffing) are audited
- If the Recruitment action is cancelled

For certificates in HHS Careers (USA Staffing) that have not been audited:

o **on day 10 and 20 after the latest certificate expiration date in WiTS** To: CSD HRS
o **on day 30 after the latest certificate expiration date in WiTS** To: CSD HRS and Cc: CSD Team Leader

	Request Number	Request Date	Complete	Deleted
149724		09/06/2012	☐	☐

Criteria
MP-14-MD

Certificate Number	Issue Date	Referral Status	Due Date	Return Date	Audit Date
WT-12-MPP-00355S0	09/06/2012	Sent to Customer	11/06/2012		

Unaudited Certificate in HHS Careers (USA Staffing)

Sample Email:

Subject: Action Needed - Audit Certificate(s) – Vacancy #NIH-NCZ-MP-14-1234565
Importance: High

Action:

- If you are extending the certificate(s), please enter the new expiration date on the WiTS Recruitment form.
- If you are not extending the certificate(s), please complete the audit process in HHS Careers (USA Staffing) and send the Disposition Letters to your applicant pool.
- If you need assistance auditing a certificate in HHS Careers (USA Staffing), please reference the HHS Careers for HR Webpage.
- For DE Announcements, be sure to send all required documents to the CSD DEU so that they can close out the case file. Remember that even if there is no selection, you must send final Disposition Letters to the applicants notifying them the status of their application.

Details: As indicated in WiTS, all of the certificates associated with vacancy announcement # NIH-NCZ-MP-14-1234565 expired on 05/19/2014. Please reference the tables below for specific information related to this action and details on the certificate(s) for this vacancy announcement that have not been audited in USA Staffing.

| WiTS#	654321
VIN	1234565
Vacancy Announcement #	NIH-NCZ-MP-14-1234565
Position Title	Lead Program Specialist
Pay Plan/Series/Grade	GS/0301/14

Certificate(s)

USAS Certificate Number	WE-14-MPP-12742S0
USAS Criteria	MP-14
USAS Certificate Issue Date	03/20/2014

Please refer to the CSD Reminder Email Guide for more details about reminder emails.

Appendix 2: Initiate Appointment

After all of the tabs on the Recruitment form have been completed, the HRS can use the drop down routing menu to initiate an Appointment action. You may make this selection multiple times for as many employees as are being hired from the recruitment.
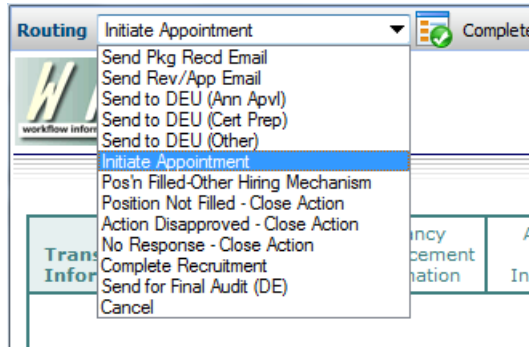
The Appointment action will appear in your WiTS worklist below the Recruitment: