



U.S. Department of State
 Office of Civil Service Talent Management
Hiring Management Enterprise System
Merit Promotion (MP) Case File Checklist

Position title, series, grade(s)	Bureau/Office/Division	Announcement Number
Section 1: Items for Inclusion in Case File		
Request from Bureau / Office		Check
a. Request to Recruit memo / e-mail		
b. Completed recruitment package received from manager / selecting official		
c. Copy of Clearance from the Office of Organization and Talent Analytics (OTA), if applicable		
d. Copy of RPC / RPL e-mail		
e. Classified Position Description for each grade level being announced <i>(must match RPC/RPL request #)</i>		
f. Gateway to State Request for New Questions Checklist and Proposed New Questions Spreadsheet (<i>Excel document</i>), if applicable		
g. Job Analysis (<i>signed by Hiring Official</i>) / Crediting Plan		
h. Weights and Balance Calculator		
i. Justification for selective placement factor, if applicable		
j. Completed DS 5109 - Individual 80 Day Hiring Timeline Service Agreement		
k. Completed and signed DS 5108 - Competitive Recruitment Consultation Guide		
l. Request sent to HR Service Provider (<i>HRSP</i>), if applicable		
All of the above documents must be included in the case file when sending to the HRSP.		
Signature of Bureau HR Specialist		Date (mm-dd-yyyy)
Section 2: To be Completed by HRSP or Delegated Bureau		
a. Announcement posted to USAJOBS		
b. Amendment(s) to vacancy announcement, if applicable - Enter Vacancy Tracking Item explaining what was amended into HMES.		
First Point Notification Refer to Corresponding with Applicant: 4 Point Notification Process		
a. Change applicants status to AR		
b. Complete Applicant Hiring Metrics - <i>OPM Hiring Milestones</i>		
Second Point Notification - Refer to Corresponding with Applicant: 4 Point Notification Process		
a. Change applicant's status to AA		
b. Complete Applicant Hiring Metrics - <i>OPM Hiring Milestones</i>		
c. Reset applicant's status		
d. Complete the eQuals Applicant Review procedures for each application reviewed in accordance with HMES guidance "Recording Applicant Qualifications Electronic Qualification Worksheet (eQuals)."		
e. Based on your assessment, select the appropriate status code from the Status Code Listing Sheet Note: You must enter a reason for the action in both field boxes in HMES If there are no qualified applicants, change vacancy announcement status to NQA (<i>if applicable</i>)		

Third Point Notification · Refer to Corresponding with Applicant: 4 Point Notification Process	
<u>Applicants Referred:</u>	
a. Generate Certificate(s)	
b. Issue Certificate(s) of Eligibles (<i>send to non-delegated Bureau HR Specialist; HMES will send to Hiring Official</i>)	
c. Change the status of the BQ applicants that are being referred to R	
d. Complete Applicant Hiring Metrics - OPM Hiring Milestones	
<u>Applicants Not Referred:</u>	
e. Change the status of remaining BQ applicants that are "not" being referred to QNR or NR	
f. Enter an appropriate reason why applicant is not being referred to selecting official in both field boxes in the Hiring Management System	
g. Complete Applicant Hiring Metrics - OPM Hiring Milestones	
h. Returned copy of Certificate of Eligibles from Applicant Manager annotated with appropriate codes - (<i>i.e., selections / non-selections and interviewed / not interviewed</i>) (Hard copies not acceptable; Certificate must be submitted from the Hiring Official through the HMES application)	
i. Instruct the hiring official to complete the CHCO Manager survey (link is provided on the certificate of eligibles). Include the confirmation page in the casefile when completed by the hiring official.	
j. Annotate selection(s). Ensure selectee(s) resumes are included in the eOPF.	
Fourth Point Notification - Refer to Corresponding with Applicant: 4 Point Notification Process	
<u>Applicants Not Selected:</u>	
a. Change applicants status to RFNS or RNSM - Status change must be annotated on the certificate AND in the Staging Area	
b. If no selection(s) were made, change vacancy announcement status to NSM	
c. Complete Applicant Hiring Metrics - OPM Hiring Milestones	
<u>Applicant(s) selected (Tentatively)</u>	
a. Change applicant(s) status to S - Status change must be annotated on the certificate AND in the Staging Area	
b. Enter "Applicant tentatively selected from Vacancy Announcement # (<i>put announcement number</i>)" in both field boxes	
c. Extend Tentative Offer to Selectee(s)	
d. Complete Applicant Hiring Metrics - OPM Hiring Milestones	
e. Send Tentative Offer Selection Package to Selectee(s). A copy of the tentative offer letter with position, grade, step and salary must be included in the case file	
f. Enter Selectee(s) into eQIP	
g. Notify Applicant(s) of security clearance status	
h. Extend Final Offer of Employment and explain any special conditions	
i. Complete Applicant Hiring Metrics - OPM Hiring Milestones	
j. Complete New Hire Employment Offer Worksheet	

<u>Applicant(s) selected (Tentatively) (continued)</u>	
k. Send EOD Package or letter directing applicant to EOD website	
l. Copy of Selectee(s) SF-50 (<i>once applicant(s) EOD</i>) and application(s)	
m. Change Vacancy Announcement status code in HMES to the appropriate code (<i>i.e., Filled, NSM, etc.</i>)	
n. Include any e-mail correspondence, notes, pertinent documents, etc. in the case file	
o. If the vacancy announcement was cancelled a brief explanation must be included in the case file explaining why it was cancelled.	
Signature of HRSP/Delegated Bureau HR Specialist	Date (<i>mm-dd-yyyy</i>)