Overview Guide: How to Hire a Budget Analyst
Cross-Government Hiring: Budget Analyst, GS-0560-12/13

> ### This guide is designed to provide the following for agency POCs:
> 1) **An overview of this Federal governmentwide recruitment effort**
> 2) **What agencies are required to do to hire from the cross-government Talent Pools**
> 3) **What steps the Hiring Manager needs to take to hire from the Talent Pools**

Please note: This guide is designed to provide a high-level overview of this process, but each agency may have different approaches and specific steps not articulated here. Questions should be raised with your agency HR points of contact to ensure you are following the appropriate protocols.

1. Overview of the Federal governmentwide recruitment for Budget Analyst, GS-0560-12/13

The OPM Hiring Experience Group (HX) partnered with OPM Human Resources Solutions (HRS) to support a Federal governmentwide recruitment for Budget Analyst, GS-0560-12/13. The job opportunity announcement (JOA) is included at the following link for your reference, and this JOA may be a useful tool for you to update and/or develop a position description (PD) to hire from these Talent Pools: CGA-DE-12398442-24-BS-VG (www.usajobs.gov/job/793207500)

HOW WERE APPLICANTS DETERMINED TO BE QUALIFIED?

Applicants were assessed through an application questionnaire, online competency-based assessments (USA Hire), and application package and resume review for specialized experience, otherwise noted as minimum qualifications. The minimum qualifications (specialized experience) and competencies listed below were included in the JOA (also shown in the link above).

GS-12 Minimum Qualifications (Specialized Experience):
1. Analyzing budget requirements and monitoring execution to ensure the use of funds are in accordance with allocation limits, policies, procedures, or laws; and
2. Using data analysis tools, techniques, and methodologies to analyze budget data to support decision-making and improve project outcomes.

GS-13 Minimum Qualifications (Specialized Experience):
1. Planning, coordinating, and monitoring budgets for programs, projects, or activities;
2. Analyzing data to identify budget trends and issues, develop reports, and present recommendations to stakeholders;
3. Using budgeting databases, analytic tools, or other methodologies to generate analyses of program budgets, develop budget projections, or identify gaps and trends;
4. Planning and ensuring that the use of funds are in accordance with allocations, policies, procedures, or laws; and
5. Verifying and validating financial data and reconciling accounts to ensure funds control.

Competencies (Technical and General from USA Hire):

For GS-12:	For GS-13, in addition to the competencies to the left, applicants were also assessed on the following:
- Budget Administration - Financial Analysis - Accountability - Arithmetic/Mathematical Reasoning - Attention to Detail - Customer Service - Decision Making - Flexibility - Integrity/Honesty - Interpersonal Skills - Learning - Reasoning - Self-Management - Stress Tolerance - Teamwork - Technical Competence	- Control of Funds - Financial Management - Principles of Finance - Internal Controls

ONCE DETERMINED TO BE QUALIFIED, WHERE DO APPLICANTS GO?

Once applicants are determined to be qualified, they move into the next stage where agencies are able to review resumes and select candidates for interview. The following terms, tools, and roles are good to know to understand what happens after applicants are determined to be qualified.

ROLES AND TERMS

- **Agency Shared Certificate Coordinator:** All agencies have at least one Shared Certificate Coordinator who has completed the necessary requirements (e.g., certification, role, training). Agency Shared Certificate Coordinators are responsible for submitting a Talent Pool request through the ATP. OPM maintains a list of Agency Shared Certificate Coordinators; please email CrossGovHiring@opm.gov to access this list.
- **Hiring Manager:** Agency program staff who has a vacancy to hire a Budget Analyst.
- **HR Recruitment / Staffing Specialist:** The agency HR partners with the Hiring Manager to complete a hiring action.
- **Position Description (PD):** The agency document that enables the hiring of a candidate. In order to hire using a PD, it must be classified by the time a selection is made. PDs should be tailored according to agency needs.
- **Selecting Official Interview (Fit Interview):** The interview conducted with candidates by the **Hiring Manager** or relevant stakeholders to ensure the candidate is a good fit for the position.
- **Talent Pool:** A Talent Pool is a list of qualified candidates who are already on an approved shared hiring certificate (cert) and ready to be hired. These candidates have opted-in to share their Federal application with Federal agencies who are hiring for similar positions. You can use Talent Pools to find candidates who fit your hiring needs. It is recommended for agency personnel interested in reviewing Talent Pools to have an account established *prior* to Talent Pool creation.
- **USAJOBS Agency Talent Portal (ATP):** The system used to review, interview, and select candidates within a Talent Pool. You must have a USAJOBS Agency Talent Portal (ATP) account to participate in governmentwide hiring actions and access Talent Pools. To request an ATP account, please contact your agency administrator or email recruiter-help@usajobs.gov and indicate your role: Shared Certificate Coordinator or Agency User (Hiring Manager, HR Specialist, Recruiter).

RELEVANT FORMS

- **Talent Pool Request Form:** The first of two forms that must be completed by the **Agency Shared Certificate**

Coordinator, working with **HR Staff (who will work with the Hiring Manager)** and emailed to CrossGovHiring@opm.gov. Completing this form is required to access the Talent Pool. To complete the form, you must:
- o Complete the Specialized Experience and Competency Verification Form (See definition below)
- o Verify your agency's category rating policy is in place
- o Email the classified position description (PD) to CrossGovHiring@opm.gov
- **Specialized Experience and Competency Verification Form:** The second of two forms that must be completed by the **Agency Shared Certificate Coordinator,** working with **HR Staff (who will work with the Hiring Manager)**, and emailed to CrossGovHiring@opm.gov. This form certifies that the specialized experience and competencies listed are important for successful job performance and required upon entry in the position the agency is filling.

2. What agencies are required to do to hire from the cross-government Talent Pools

PHASE 1: WORKING WITH YOUR AGENCY SHARED CERTIFICATE COORDINATOR TO ACCESS THE TALENT POOLS

- **Step 1**: **Hiring Manager** and their HR staff (e.g., Recruiter, HR specialist) work together to:
  - o Identify their agency-specific classified position description (PD) in the 0560 job series, GS-12 and/or GS-13 (or equivalent). If no classified PD can be found within the agency, you can develop a new PD.
    - ▪ *Note:* Your PD does not need to be classified for you to receive access to the Talent Pools and review resumes to interview candidates, but your PD <u>must be classified by the time you make a selection of a final candidate to extend a tentative job offer</u>.
    - ▪ HR staff can also request copies of sample Budget Analyst, GS-0560-12 and/or GS-0560-13 PDs for use in classification from CrossGovHiring@opm.gov
  - o If an existing PD is identified, verify/update the PD so that the specialized experience and competencies are appropriate for qualification; if it is determined that no existing classified PD exists and a new PD will need to be classified, existing PDs can also be modified/customized for agency use.
- **Step 2**: **HR Staff** notifies **Agency Shared Certificate Coordinator** of the **Hiring Manager's** interest in hiring from the Talent Pools, and the **Agency Shared Certificate Coordinator** requests access to the Talent Pools in ATP.
- **Step 3: Agency Shared Certificate Coordinator** works with HR Staff and **Hiring Manager** to verify that the hiring information is correct and emails the forms to CrossGovHiring@opm.gov.
  - o **Hiring Manager** and **HR Staff** should ensure that the information on the Talent Pool Request Form is accurate to ensure that the Agency Shared Certificate Coordinator has all the information they need for submission.
  - o Complete the attached Specialized Experience and Competency Verification Form (Form B).
  - o To see qualified candidates, you must have a funded FTE slot to fill from these Talent Pools.

PHASE 2: WORKING WITH YOUR AGENCY'S HR STAFF TO INTERVIEW AND HIRE CANDIDATES
- **Step 4**: **Hiring Manager** contacts qualified candidates to schedule and complete the selecting official interviews.
- **Step 5**. Once the **Hiring Manager** elects to make a selection (i.e., extend a tentative job offer to a candidate) from the Talent Pool within ATP, they notify their HR Staff; HR staff then sends an email to CrossGovHiring@opm.gov to notify them of the desire to make a selection.
  - o *Note:* Agency selection and hiring rules and policies should be followed when reviewing Talent Pools and making selections. Agency unique hiring practices and the agency's standard HR process will need to be considered as part of this recruitment.

  Step 6: OPM sends a Certificate Review via USA Staffing to allow the HR Staff and **Hiring Manager** to

gain access to the candidate's application materials for case file records.

- **Step 7**. OPM verifies selections made by the **Hiring Manager** (e.g., checks that we have the agency's classified PD) and confirms with agency via email.
- **Step 8: Hiring Manager** works with their HR Staff to make tentative job offers and onboard selectees using their agency's standard HR pre-employment process. OPM must be informed by the agency's HR Staff of the result of the tentative job offer (i.e., acceptance or declination). Once selections are approved, the agency's HR staff should consider:
    - o OPM is unable to flow selectees to any agency's USA Staffing Onboarding system, so the agency's HR staff must manually build New Hire records: https://help.usastaffing.gov/USAS/index.php?title=Creating_a_new_hire_request
    - o USA Staffing customers may need to switch their Tenant to find the recruitment: https://help.usastaffing.gov/HiringManager/index.php?title=Switching_between_tenants
    - o Follow your agency's onboarding procedures. The agency's HR staff are responsible for sending job offers, requesting SF-75 and confirming Federal employment (if applicable), setting pay, etc.
    - o Use agency policy for number of days the selectee has to accept a job offer; include the response due date in the job offer.
    - o OPM tracks tentative offer acceptances and declinations. Email CrossGovHiring@opm.gov regularly with updates. Before a candidate is marked *Withdrawn from Consideration*, OPM needs to know if they declined your agency *only* or withdrew from *all* agencies. Forward any documentation to CrossGovHiring@opm.gov.

3. What steps the Hiring Manager needs to take to hire from these Talent Pools

- ➢ **Make sure you have an active USAJOBS Agency Talent Portal account**. You must have a USAJOBS Agency Talent Portal (ATP) account for pooled hiring access. *To request an ATP account, please contact your agency administrator or email recruiter-help@usajobs.gov and indicate your role: Shared Certificate Coordinator or Agency User (Hiring Manager, HR Specialist, Recruiter).*
- ➢ **Reach out to your HR staff/Talent Team partner** to align on steps, requirements, and timelines; review the forms included in this document to make sure you are familiar with required information.
- ➢ **Confirm with your HR staff/Talent Team partner whether your agency has a classified PD that can be used for this hiring action.**
- ➢ **Work with your Agency Shared Certificate Coordinator and HR staff/Talent Team partner to confirm that the details on the required forms are correct.**
- ➢ **Begin reviewing resumes** once you get access to ATP.
- ➢ Determine your plan for **interviewing for fit.**
- ➢ **Once you have selected a candidate, reach out to your HR Staff** to contact OPM to validate your selections.
    - o Once OPM validates your selections: Move forward on hiring!

Form A. Talent Pool Request Form

Job opportunity announcement: CGA-DE-12398442-24-BS-VG (www.usajobs.gov/job/797307500)

*HR Official—***Have you…?: (Please *X* the boxes.)**

☐ Received the completed Specialized Experience and Competency Verification Form certifying the experience and competencies assessed are appropriate for the position?

☐ Verified agency's category rating policy is in place?

☐ Completed **ALL** required information below? (We must collect for audit purposes.)

POSITION INFORMATION

Title: _____

Series: 0560   **Pay Plan & Grade(s):** _____

Duty Location(s): _

Appointment Type: Competitive Service, Permanent

Reemployment Priority List (RPL) Cleared?:   ☐ **Yes**

There is a hiring freeze in effect, per the President's action.

To proceed with accessing an existing Talent Pool/certificate of eligibles, you must personally verify that the position you are trying to fill is exempt from the hiring freeze.

To confirm, please select one of the options below and then check "I confirm." If you are unsure if your agency has an exemption to fill this position, you must contact your supervisor for clarification and approval before moving forward.

☐ This certificate will be used to fill a position directly related to immigration enforcement, national security, or public safety.

☐ This certificate will be used to fill a position directly related to the provisioning of Social Security, Medicare, or Veterans' benefits.

☐ This certificate will be used to fill a position exempted by the Acting Director, Office of Personnel Management, explicitly and in writing.

Contact tracking@opm.gov with any questions.

☐ I confirm / ☐ I cannot confirm

REQUESTING AGENCY INFORMATION – HR OFFICIAL

Agency:_____

Name:_____

Email and Phone:_____

Signature and Date:_____

If your agency HR, hiring managers, selecting officials, or others involved in the hiring process don't already have USAJOBS Agency Talent Portal accounts as described on the previous pages, please email recruiter-help@usajobs.gov to request their Agency User access, so they may view Talent Pools shared with your agency.

Form B. Specialized Experience and Competency Verification Form

Job opportunity announcement: CGA-DE-12398442-24-BS-VG (www.usajobs.gov/job/797307500)

Completion of this form is mandatory for agencies that are interested in reviewing Talent Pools resulting from the action and potentially making selections. This form should be completed and placed within the agency case file for the hiring action. Failure to complete this form, or otherwise participating in the hiring action without sufficient verification support, places the agency at significant risk for hiring unqualified candidates.

OPM makes no assertion as to the appropriateness of the use of the referenced job opportunity announcement (JOA) with or without the completion of this form. The agency bears sole responsibility as to the appropriateness of the use of the JOA for filling vacancies within the agency.

The specialized experience and competencies that were identified as important and required at entry for the position referenced above are provided on the following pages. To participate in this cross-government recruitment, the specialized experience and competencies **must** be important and required at entry for the referenced position in your agency. Use this form and the instructions provided to complete the verification process.

Specialized Experience Verification: Review the specialized experience statements in the following tables. For each specialized experience, indicate if the experience is important for successful performance in the targeted position and if the experience is needed upon entry. By checking *Yes* in the second and third columns, you certify the specialized experience is important and needed upon entry for the targeted position. To participate in this recruitment, each specialized experience listed below must be both important and needed upon entry for the position referenced above.

GS-12 Specialized Experience Statement	Experience is Important for Successful Performance	Experience is Needed Upon Entry
Analyzing budget requirements and monitoring execution to ensure the use of funds are in accordance with allocation limits, policies, procedures, or laws.	Yes ☐ No ☐	Yes ☐ No ☐
Using data analysis tools, techniques, and methodologies to analyze budget data to support decision-making and improve project outcomes.	Yes ☐ No ☐	Yes ☐ No ☐

GS-13 Specialized Experience Statement	Experience is Important for Successful Performance	Experience is Needed Upon Entry
Planning, coordinating, and monitoring budgets for programs, projects, or activities.	Yes ☐ No ☐	Yes ☐ No ☐
Analyzing data to identify budget trends and issues, develop reports, and present recommendations to stakeholders.	Yes ☐ No ☐	Yes ☐ No ☐
Using budgeting databases, analytic tools, or other methodologies to generate analyses of program budgets, develop budget projections, or identify gaps and trends.	Yes ☐ No ☐	Yes ☐ No ☐
Planning and ensuring that the use of funds are in accordance with allocations, policies, procedures, or laws.	Yes ☐ No ☐	Yes ☐ No ☐
Verifying and validating financial data and reconciling accounts to ensure funds control.	Yes ☐ No ☐	Yes ☐ No ☐

Competency Verification: Review the competencies in the following tables. For each competency, indicate if the competency is important for successful performance in the targeted position and if the competency is needed upon entry. By checking *Yes* in the second and third columns, you certify the competency is important and needed upon entry for the targeted position. To participate in this recruitment, each competency listed below must be both important and needed upon entry for the position referenced above.

GS-12 Competency	Competency is Important for Successful Performance	Competency is Needed Upon Entry
Budget Administration	Yes ☐ No ☐	Yes ☐ No ☐
Financial Analysis	Yes ☐ No ☐	Yes ☐ No ☐

GS-13 Competency	**Competency is Important for Successful Performance**	**Competency is Needed Upon Entry**
Budget Administration	Yes ☐ No ☐	Yes ☐ No ☐
Financial Analysis	Yes ☐ No ☐	Yes ☐ No ☐
Control of Funds	Yes ☐ No ☐	Yes ☐ No ☐
Financial Management	Yes ☐ No ☐	Yes ☐ No ☐
Principles of Finance	Yes ☐ No ☐	Yes ☐ No ☐
Internal Controls	Yes ☐ No ☐	Yes ☐ No ☐

Agency: _____

Hiring Manager (HM) or Subject Matter Expert (SME) Name: _____

HM or SME Email and Phone: _____

HM or SME Signature and Date: _____