

## IHS Group Recruitment and Retention Incentives

**(Group *relocation* incentives are only authorized in very limited situations involving organizational changes)**







“Approved group” refers to the targeted group of IHS positions, as approved by the IHS Director, for inclusion in the group incentive. The criteria defining the approved group may include a variety of factors such as occupational series, grade level, distinctive job duties, and geographic location. Criteria may differ between approved group incentives. Some group incentives may include both recruitment and retention incentives, and some group incentives may only include either recruitment or retention incentives.

### 1. Employee Eligibility -All eligibility criteria for each type of group incentive must be met.

<b>Group Recruitment Incentive</b>
1. Newly appointed to the Federal government or reappointed to the Federal government after a 90-day break. Former Federal employees who were on time-limited appointments and internship appointments do not require a 90-day break.
2. Is assigned to a position in the approved group
3. Is not in the Senior Executive Service
4. Is not currently fulfilling the service period for a relocation or a retention incentive
<b>Group Retention Incentive</b>
1. Is assigned to a position in the approved group
2. – Has a rating of record in a position in the approved group of Achieved Expected (AE) Results (level 3) or above in the last 52 weeks. The rating of record does not need to be in the employee’s current position. If performance falls below the AE level, the employee becomes ineligible for the incentive. – If the employee’s last rating of record was in a position outside the approved group, the employee must be placed on a performance plan for a position in the approved group, evaluated after 90 days, and given an interim rating of AE or above to become eligible. * <u>See</u> page 4 of this guidance for a quick way for supervisors and employees to attest to the start of an employee’s 90-day appraisal period for purposes of group retention incentive eligibility.
3. Is not in the Senior Executive Service
4. Is not currently fulfilling the service period for a recruitment, relocation, or retention incentive

### 2. Effect of HR Actions on Employee Eligibility for Each Type of Group Incentive

**All employee eligibility criteria from section 1 continue to apply.**

Action	Group Recruitment Incentive	Group Retention Incentive
Hired, reassigned, temporarily promoted, or permanently promoted to a different position <u>in the approved group</u>		
Hired, reassigned, temporarily promoted, or permanently promoted to a different position <b>NOT</b> in the approved group		
Detailed from position in the approved group to a different position NOT in the approved group or to a different position in the approved group. Group incentive continues since the employee’s position of record remains in the approved group		

### 3. Sample Scenarios Involving Group Incentives:

<b>Group Incentive Including Both Group <i>Recruitment</i> and <i>Retention</i> Incentives</b>
<p>New employee hired from the non-Federal sector to a position in the approved group and paid under the General Schedule (GS). The employee did not receive an individual recruitment incentive when hired.</p> <ul style="list-style-type: none"><li>• Employee is eligible to receive a group recruitment incentive with a one-year service period</li><li>• Following one year of service, the employee becomes eligible for the group retention incentive provided they have a rating of record of rating of AE or above.</li></ul>
<p>Employee transferred from another Federal agency (or a different part of IHS) to an approved group in IHS and is paid under the GS. The employee did not receive a relocation incentive.</p> <ul style="list-style-type: none"><li>• Employee is not eligible for a group recruitment incentive since they are not newly appointed to the Federal service.</li><li>• Employee is not immediately eligible for a group retention incentive since they do not have a rating of record of AE or above in a position in the approved group. After serving for 90 days under a performance plan in a position in the approved group (<u>see</u> attestation form to document 90-day appraisal period), employee may be given an interim rating. If the interim rating is AE or above, the employee is eligible for the group retention incentive.</li></ul>
<p>Employee reassigned from an IHS component to an approved group in IHS. Employee is paid under the GS. Employee received a 25 percent relocation incentive with a one-year service period in connection with moving to accept the new position in the approved group.</p> <ul style="list-style-type: none"><li>• Employee is not eligible for a group recruitment incentive since they are not newly-appointed to the Federal service.</li><li>• Employee will not be eligible for the group retention incentive until they fulfill the one-year service period for the relocation incentive. Following the one-year service period for the relocation incentive, and if the employee received a rating of record of AE or above in the approved group, the employee will become eligible for the group retention incentive.</li></ul>
<p>Current employee receiving a group retention incentive reassigned from a position in an approved group to a different position in the same approved group. Employee is paid under the GS.</p> <ul style="list-style-type: none"><li>• Employee is not eligible for a group recruitment incentive since they are not newly-appointed to the Federal service.</li><li>• Employee is immediately eligible to continue the group retention incentive provided that the employee received a rating of record of AE or above in a position (does not have to be in the employee's new position) in the approved group in the past 52 weeks.</li></ul>
<p>Employee has a rating of record of AE in the last 52 weeks in a position in the approved group and receives a group retention incentive. The employee changes positions within the approved group and the employee's performance then falls below the AE level in the new position. The employee is issued a rating of record of "Achieved Unsatisfactory Results."</p> <ul style="list-style-type: none"><li>• Employee loses eligibility for the group retention incentive since performance is no longer at the required AE or above level. The group retention incentive is stopped for the employee.</li></ul>

## Group Incentive Including Only Group Retention Incentives

New employee hired from the non-Federal sector to a position in the approved group and paid under the GS. The employee did not receive an individual recruitment incentive when hired.

- Employee is not immediately eligible for a group retention incentive since they do not have a rating of record of AE or above in a position in the approved group. After serving for 90 days under an established performance plan in a position in the approved group, employee may be given an interim rating. If the interim rating is AE or above, the employee is eligible for the group retention incentive.

Employee transferred from another Federal agency (or a different part of IHS) to an approved group in IHS and is paid under the GS. The employee did not receive a relocation incentive.

- Employee is not immediately eligible for a group retention incentive since they do not have a rating of record of AE or above in a position in the approved group. After serving for 90 days under a performance plan in a position in the approved group (see attestation form to document 90-day appraisal period), employee may be given an interim rating. If the rating is AE or above, the employee is eligible for the group retention incentive.

Employee reassigned from an IHS component to an approved group in IHS. Employee is paid under the GS. Employee received a 25 percent relocation incentive with a two-year service period in connection with moving to accept the new position in the approved group.

- Employee will not be eligible for the group retention incentive until they fulfill the two-year service period for the relocation incentive. Following the two-year service period for the relocation incentive, and if the employee received a rating of record of AE or above in the approved group, the employee will become eligible for the group retention incentive.

Current employee receiving a group retention incentive reassigned from a position in an approved group to a different position in the same approved group. Employee is paid under the GS.

- Employee is not eligible for a group recruitment incentive since they are not newly-appointed to the Federal service.
- Employee is immediately eligible to continue the group retention incentive provided that the employee received a rating of record of AE or above in a position (does not have to be in the employee's new position) in the approved group in the past 52 weeks.

Employee has a rating of record of AE in the last 52 weeks in a position in the approved group and receives a group retention incentive. The employee changes positions within the approved group and the employee's performance then falls below the AE level in the new position. The employee is issued a rating of record of "Achieved Unsatisfactory Results."

- Employee loses eligibility for the group retention incentive since performance is no longer at the required AE or above level. The group retention incentive is stopped for the employee.

**Supervisor/Employee Attestation Regarding Appraisal Period Start Date**

This form only needs to be used for employees who are new to the approved group and do not have a performance rating of record in some position in the approved group in the past 52 weeks. In this case, the employee must be placed on a performance plan for the position in the approved group, evaluated after 90 days, and given an interim rating of AE or above to become eligible for the group retention incentive. USA Performance is the automated performance management system used in IHS to establish performance plans, provide ratings, and accept electronic signatures. However, due to possible delays in USA Performance in formally establishing performance plans, it is considered that an employee's appraisal period begins on the employee's first day in a position in the approved group regardless of whether a performance plan has been formally established in USA Performance. This policy is adopted to benefit employees and to quickly start the required 90-day appraisal period needed before an interim rating can be issued that will allow the employee to be eligible for a group retention incentive.

**Agreement**

The supervisor and the employee agree that in regards to the 90-day performance appraisal period to determine the employee's eligibility for a group retention incentive, the following is true:

Start Date of Appraisal Period (should be first day in position in approved group): \_\_\_\_\_

The employee has been advised about their performance plan and performance elements/standards for their new position. The employee has been given an opportunity to ask questions and an opportunity to receive an advance copy of their performance elements before the performance plan is officially established in USA Performance.

Upon signing this, the supervisor also attests that a performance plan for the employee is being established in USA Performance.

Employee Signature/Date: \_\_\_\_\_

Supervisor Signature/Date: \_\_\_\_\_

Interim Rating After 90-Day Appraisal Period: