

OFFER CARD CHECKLIST

The checklist is broken down by Offer Card sections and should be followed in order. Many of the Offer Card fields are auto-filled with information from the requisition and do not require action. They are not included in the checklist below unless review is necessary.

- Hover over any underlined words to view a quick tip on that section or phrase (You may need to download this PDF in order to view the quick tip features).
- Click on **bolded words** next to a hyperlink icon (🔗) to access online resources related to that section or phrase.

ACTIONS PRIOR TO THE PREPARING THE OFFER CARD

- ___ Interview applicants and identify top candidate
- ___ Inform remaining applicants that they're not selected
- ___ Move remaining applicants' statuses to *Unsuccessful*
- ___ Move top candidate's status to *Reference check*
- ___ Perform reference check (if it hasn't been done already)
- ___ Move top candidate's status to *Recommend for hire*
- ___ Contact top candidate to make a verbal offer
- ___ AFTER candidate accepts, move their status to *Verbal Offer Accepted*. Prepare Offer Card to prompt the Offer Card

COMPLETING THE OFFER CARD BY SECTIONS & FIELDS

I PERSONAL DETAILS

II JOB DETAILS

III OFFER DETAILS

- ___ Match the position numbers to the right candidates

IV POSITION DETAILS

- ___ Start date
- ___ End date – ONLY for Limited Term or Temporary
- ___ K-State eID - applies if they worked/work for the university
- ___ Regular or Temporary (benefits or non-benefits eligible)
- ___ Full time or Part time
- ___ Probationary status – for non-temp. USS positions ONLY
- ___ Probationary period

V SALARY

- ___ FLSA Status - match what's in the yellow box
- ___ Approved Salary
- ___ Salary - Convert your salary according to the following:
 - Regular + Exempt = Annual salary
 - Term + Exempt = Bi-weekly rate
 - Regular + Non-exempt = Hourly rate
 - Term + Non-exempt = Hourly rate
- ___ Rate period - reflects the salary conversion
- ___ Salary notes - explain any impacts on the offered salary

VI PRE-EMPLOYMENT CHECKS

- ___ Background screening (Yes or No)
 - ___ Yes - select background check package
 - ___ No - If the new hire doesn't match the options, they most likely need a background check - Call your Strategic Partner
 - ___ Select additional options if needed

VII ONBOARDING WORKFLOWS

- ___ Onboarding form (Hire Form or Hire Form - Athletics)
- ___ Onboarding workflow (See charts on pages 2-4)
- ___ Reports to manager – immediate supervisor
- ___ Onboarding delegate – HR Liaison

VII OFFER PROGRESS

Do NOT make changes to this section

IX OFFER DOCUMENTS

- ___ Upload the **contract** 🔗, **offer letter** 🔗, and/or **appointment papers** 🔗
 1. Select Add document
 2. A window will be triggered
 3. Document Category will be "Offer Card Documents"
 4. Title
 5. Select Save and add another or Save and close

X APPLICATION DOCUMENTS

XI APPROVAL PROCESS

- ___ The Originator is the person filling the offer card
- ___ Leave the Approval process at None

XII PROVISIONING


- ___ Create a provision list
 1. Select Add
 2. A window will be triggered
 3. Select applicable provisions
 4. Select Save
- ___ Provisioning address is where provisions will be delivered

XIII SELECT SAVE TO COMPLETE - STOP HERE

WHERE TO FIND ADDITIONAL RESOURCES ON:

- Offer card process - [Managing Offers instruction guide](#) 🔗
- All aspects of the hiring process - [Hiring Tools web page](#) 🔗
- PageUp - Applicant Tracking System Instruction Guides [web page](#) 🔗
- Hiring Best Practices - [Hiring Guide](#) 🔗
- Required Training - [Intro to Search Committee](#) 🔗 and [Hiring Top Talent Best Practices](#) 🔗

Types of Onboarding Form and Workflow


If This			Select This in PageUp	
Employee Type		Hire Type	Onboarding Form	Onboarding Workflow
Unclassified (UNC)	Benefit Eligible (.50 FTE or greater)	New Hires (all contract types except Faculty) Rehires GRA / GTA to Unclassified	Hire Form	Unclassified - New or Rehire
		Local Agency to KSU Agency Transfer SOK to KSU	Hire Form	Unclassified - Local Agency or Agency Transfer
		New or Rehire Faculty	Hire Form	Faculty - New or Rehire
		Promotion or Transfer (Unclassified to Unclassified)	Hire Form	Promotion / Transfer - UNC to UNC
		Transfer from Hourly Student to Unclassified	Hire Form	Hourly Student to Unclassified
		Temporary Unclassified to Regular Unclassified	Hire Form	Temporary Hire to Unclassified (Reg/Term) Position
		Benefit Eligible USS to Unclassified	Hire Form	Promotion / Transfer - USS to UNC
	Non-Benefit Eligible (<.50 FTE)	Adjunct Appointments	Hire Form	<i>Coming in 2018</i>
		Regular to Temporary (benefit eligible to a non-benefit eligible position)	Hire Form	Temporary Hire
		Rehired Retiree	Hire Form	Temporary Hire
		New or Rehire Unclassified Temporary	Hire Form	Temporary Hire

If This



Select This in PageUp

Employee Type		Hire Type	Onboarding Form	Onboarding Workflow
University Support Staff (USS)	Benefit Eligible (Regular appointment of .50 FTE or greater)	New Hires	Hire Form	USS - New or Rehire
		Rehires		
		GRA / GTA to USS		
		Local Agency to KSU	Hire Form	USS - Local Agency or Agency Transfer
		Agency Transfer State of Kansas (SOK) to KSU		
		Promotion / Transfer / Demotion (USS to USS)	Hire Form	Promotion / Transfer - USS to USS
		Police Officers	Hire Form	USS - New or Rehire
		USS Limited Term	Hire Form	USS - New or Rehire
		Transfer from Hourly Student to USS	Hire Form	Hourly Student to USS
		Temporary USS to Regular USS	Hire Form	Temporary Hire to USS Position
	Benefit Eligible Unclassified to USS	Hire Form	Promotion / Transfer - UNC to USS	
	Non-Benefit Eligible (Temp. appt. or Reg. appt. of <.50 FTE)	Regular to Temporary (benefit eligible to a non-benefit eligible position)	Hire Form	Temporary Hire
		Rehired Retiree	Hire Form	Temporary Hire
New or Rehire USS Temporary		Hire Form	Temporary Hire	

If This			Select This in PageUp	
Employee Type	Hire Type	Onboarding Form	Onboarding Workflow	
Graduate Students	Graduate Research Assistant Graduate Teaching Assistant	Hire Form	Temporary Hire	
	USS/UNC Benefit Eligible to Graduate Student	Hire Form	<i>Coming in 2019</i>	
Employee Type	Hire Type	Onboarding Form	Onboarding Workflow	
Hourly Students	Hourly Students	Hire Form	<i>Coming in 2019</i>	
	USS/UNC Benefit Eligible to Hourly Student	Hire Form	<i>Coming in 2019</i>	