Managing Offers

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Managing Offers in PageUp

Initiating an offer

Depending on the role you have in the recruitment process, you will have access to move an applicant to the **Prepare Offer** status.

To navigate to the applicants, there are a couple of options.

From the **Dashboard** the user can access the applicants by selecting **Jobs open** from the **Bubble** or **hamburger drop down menu**.

Once directed to the open job list, the option to **View job** is displayed and should be selected.

Click on **View Job** to be directed to the Requisition Information page. Next, click on **View applications** to be directed to the applicants who have applied to the position.
Select the candidate that you want to move by clicking in the Green box. Next, select the Bulk Move.

To initiate the process, change the current Status to Prepare Offer. When the applicant Status is moved to Prepare Offer, the Offer Card is displayed. Fields from the Requisition and the Applicant Card will be pre-populated with data carried over.
The user will be asked to **Confirm status change**. The page will contain history of the **Status** the applicant has moved through and will allow the addition of notes to the **Applicant Card**.

Complete this step by selecting **Move now**.
The initial display of the Offer Card pulls forward personal details, job details, and offer details contained in the PageUp system. For Term positions, include the End date, if applicable field. This may not exceed 365 days from the start date.

Position Details will be started by the user initiating the offer. Details that are unknown to the initiator may remain blank, as the offer will progress to several users before it is complete. Only required fields noted by an asterisk (*) will prevent the offer from moving forward.

If the hourly rate/salary range is not within the advertised range for USS and Unclassified Professionals positions, please consult with Compensation and Organization Effectiveness for guidance prior to making the final offer. The Salary notes field can be used to provide the explanations that impact salary, such as: if the salary accepted by the candidate is not within the advertised salary range or if the candidate would receive an increase in salary upon completion of degree requirements.
Indicate if a background check is needed for the candidate by selecting the Yes or No option.

Select the Onboarding Form which is applicable to the offer.
Select the Onboarding workflow which applies to the position.

Indicate the immediate supervisor of the candidate in the Reports to manager field. Select the binoculars to confirm the email address. Indicate the individual who is responsible for onboarding the candidate in the Onboarding delegate field. In some cases, it may be the immediate supervisor, HCS Liaison, or faculty mentor. Select the binoculars to confirm the email address.

The Offer Progress fields will be automatically updated by the system.
The next section tracks the progress of the offer and is automatically updated by the system.

**Offer documents**

Offer documents contain two options; *Add document* and *Merge document*.

Additional documents, such as benefits details or any other documents that should be included in an offer may be attached by selecting *Add document* on the left side of the screen.

To access a *Merge document*, first select the title *Merge document*. *Merge document* has been set up to merge data from the PageUp system into the offer letters and contracts created.

Note: you will not be able to select *Merge document* until all mandatory fields have been completed.
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You will then be able to select the offer letter template and/or the contract that has been set up in the system. The fields which are to be pulled or “merged” will populate in the document. Once merged, the completed document will be attached to the Offer Card and ready for review. Edit the document as needed. Once editing has been completed, you will need to save the document to your desktop or file. Then you will need to upload the final document. Be sure to delete the original merged document. The documents which are in the Document section is what will be viewed during the approval process, as well as, the candidate whom has been extended the offer.
Offer approval

The Approval process will be initiated when the offer is saved. All required fields must be completed. Select from the drop down list the approval that is appropriate for the offer created. The selection will generate the fields to be populated for the appropriate individuals at each level. The first approver will populate any data that is incomplete, or will approve and pass to the next approver.

Extending the offer

Once the final offer approval has been completed, an email will be extended to the applicant to log into their applicant portal and view the details of the offer. When the new hire selects an acceptance, the Status in the system will change to Offer accepted, or conversely to Offer declined if that is the case.