



Managing Offers

Table of Contents

Recommending candidate for Hire:	2
Accessing the Offer Card:	2
Preparing the Offer Card:	3
I. Offer Details	3
a. Position Details	3
b. Salary	4
c. Pre-Employment Checks	4
d. Onboarding	4
II. Offer Documents	8
a. Creating an auto-filled document	8
III. Approval Process	10
a. Submit the Offer Card	10
Extending the offer:	10



User Guide

Recommending candidate for Hire:

When you completed interviews and are ready to recommend the top candidate for hire, you will need to update the candidate status to Recommended for Hire.

Step 1: Open the job requisition then select **View Applications**

Step 2: Click on the candidate's name

Step 3: In the Applications section, click on the recruitment status and change to **Recommended for Hire**

Step 4: Click **Next**

Step 5: Complete the status change by selecting **Move now**

This provides permission to move forward with the verbal contingent offer. However, the hiring manager may want to confirm with the Dean or VP office that the offer can move forward with the approved salary range.

Accessing the Offer Card:

Please refer to your College / Unit's protocol regarding verbal contingent offers and preparing the offer card before proceeding. The person responsible for this process will be the one which will complete the offer card. (this may be the HCS Liaison or Hiring Manager associated with the recruitment).

- **Step 1:** After conducting reference checks, the hiring manager can contact the candidate to make the verbal contingent offer.

NOTE: If during the **verbal contingent offer**, the candidate declines, the status for this individual needs to be updated to **Offer declined**.

- a. Click **Next**. Allow the **Offer with Kansas State University has been Decline** email communication to be sent.
- b. Indicate the **Offer decline reason**.
- c. Click **Move Now**.

Interview Panel / Hiring Manager Review
Interview Panel / Hiring Manager Review unsuccessful
Phone / Video Interview Event Booking
Phone / Video Interview Accepted
Phone / Video Interview Declined
Phone / Video Interview Unsuccessful
In Person Interview Event Booking
In Person Interview Accepted
In Person Interview Declined
In Person Interview Unsuccessful
Reference Check
Reference Check unsuccessful
Recommended for Hire
Verbal Offer Accepted, Prepare Offer Card
Background Check Complete
Background Check On Accession
Offer declined
Offer accepted, form complete

Save Next > Cancel



User Guide

- **Step 2: AFTER** verbal contingent offer is **accepted and negotiations are set**, the status of the individual needs to be changed to **Verbal Offer Accepted. Prepare Offer Card**. This initiates the offer card.
- **Step 3: Select the individual which has accepted the verbal contingent offer.**
- **Step 4:** Click on the individual's name
- **Step 5:** In the Applications section, click on the recruitment status and change to **Verbal Offer Accepted. Prepare Offer Card**
- **Step 6:** Click **Next**
- **Step 7:** Complete the status change by selecting **Move now**

**** IMPORTANT MESSAGE ****

Verbal Offer Accepted. Prepare Offer Card
is the **LAST status you will change.**



Preparing the Offer Card:

Fields from the **Job Requisition** and the **Applicant Card** will be pre-populate certain fields on the **Offer Card**.

I. Offer Details

You will see the **Position no** and **Applicant's name**. In most situations, the Position no will already be marked for the individual. However, if there are several position numbers listed on the job requisition, you may need to change the position number to match the applicant. To do this, click on the appropriate position number and proceed with the offer card.

a. Position Details

It is important to gather all of the details prior to starting the offer card. Fields noted by an **asterisk (*)** are required and will prevent the offer card from being saved.

- **Start Date** – this is the date which the hire will report to start their new position.
 - For a NEW hire, this date should reflect the actual date which the new hire reports for their first day of work.
 - For a current employee, the start date will be the first day of the pay period.
- **End date** - *For **Term** or **Temporary** positions. *This may not exceed 365 days from the start date.*



User Guide

b. Salary

- **Salary* and Rate Period** – the salary may need to be converted to Bi-weekly or Hourly pay rate in the **Salary*** field based on **position type** and **FLSA status**
- **Follow the guidelines** in the **Salary section** to determine how the pay should be shown in the **Salary field**
- **Rate Period** should accurately represent the correct position type and FLSA conversion.

c. Pre-Employment Checks

Indicate if a background check is needed for the candidate by selecting the **Yes** or **No** option. To determine if a background screen is necessary, please view the [Policy and Procedure Manual Chapter 4015](#).

1. **Background Screen** is required: Select the appropriate **background screen package**.

NOTE: The **Core package** is the **Standard Background Check**.

The **Core package** includes:

- Criminal Search
- Federal U.S. District Courts
- SSN Trace
- National Sex Offender Registry Search
- National Criminal Background Search

2. **Background Screen** NOT required: Select the appropriate reason for not requesting a background screen. Talent Acquisition will verify the reason.
3. Indicate if this position requires a **drug screen**, and / or **physical**.

d. Onboarding

1. Select the appropriate **Onboarding Form** and **Onboarding Workflow**.
 - a. **Onboarding Form** consists of the required information needed from the hire



User Guide

- b. **Onboarding Workflows** determine the **New Hire Tasks** that are to be completed by the **Hire** (Employee) and by the **Reports to manager*** (typically the supervisor for the hire) and the **Onboarding delegate** (typically the HCS Liaison)
 2. The **New Hire Tasks** for the **Reports to Manager*** and the HCS Liaison (**Onboarding delegate**) will appear on that individual's dashboard.
 - a. The **Reports to Manager*** (immediate supervisor for the employee). This is the person who is responsible for setting the stage and professional development of the employee.
 - b. Select the Binoculars to confirm the email address
 - c. The **Onboarding Delegate** is the individual who is responsible for the hire paperwork for the employee. In most cases, this will be the HCS Liaison in this role.
 - d. Select the **Binoculars** to confirm the email address.

Onboarding Workflows

Type of Hire	Onboarding Form	Onboarding Workflow
Faculty: New or rehire	Hire Form	Faculty - New or Rehire
Faculty Non-resident hire	Hire Form	Non-Resident Employee - Faculty
Faculty Hire from current temporary faculty	Hire Form	Temporary Hire to Unclassified (Reg/Term) position
Faculty Hire from current benefits eligible unclassified staff or faculty (Regular or Term) employee	Hire Form	Promotion / Transfer - Unclassified to Unclassified
Faculty Hire from GRA / GTA	Hire Form	Faculty - New or Rehire
Faculty Temporary Instructors	Hire Form	Temporary Instructors



User Guide

Type of Hire	Onboarding Form	Onboarding Workflow
Unclassified New or rehire (Regular or Term)	Hire Form	Unclassified - New or Rehire
Unclassified Non-resident hire (Regular or Term)	Hire Form	Non-Resident Employee - Unclassified
Unclassified hire (Regular or Term) from GRA or GTA	Hire Form	Unclassified - New or Rehire
Unclassified hire from local agency (Regular or Term)	Hire Form	Unclassified - Local Agency or Agency Transfer
Unclassified hire from State of Kansas (SOK) agency (Regular or Term)	Hire Form	Unclassified - Local Agency or Agency Transfer
Unclassified hire (Regular or Term) from a Current Hourly student employee	Hire Form	Hourly Student to Unclassified
Unclassified Hire (Regular or Term) from a current benefits eligible unclassified employee	Hire Form	Promotion / Transfer - Unclassified to Unclassified
Unclassified Hire (Regular or Term) from current Temporary (non-benefits eligible) Unclassified or USS position employee	Hire Form	Temporary Hire to Unclassified (Reg/Term) Position
Unclassified Hire (Regular or Term) from current benefits eligible USS employee	Hire Form	Promotion / Transfer - USS to Unclassified
Unclassified Temporary: New or rehire	Hire Form	Temporary Hire
Unclassified Temporary: Non-resident hire	Hire Form	Temporary Hire - Non Resident Employee
Unclassified Temporary Hire from current Temporary Unclassified or USS employee	Hire Form	Temporary to Temporary
Unclassified Hire from Retiree rehire	Hire Form	Temporary Hire
Unclassified Temporary Hire from current benefits eligible unclassified employee	Hire Form	Temporary Hire



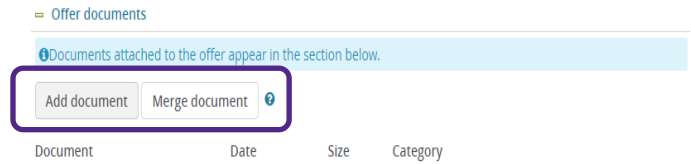
User Guide

Type of Hire	Onboarding Form	Onboarding Workflow
USS New hire or rehire	Hire Form	USS - New or Rehire
USS Hire from GRA / GTA	Hire Form	USS - New or Rehire
USS Hire from current USS Limited Term employee	Hire Form	Promotion / Transfer – USS to USS
Police Officer	Hire Form	USS - New or Rehire
USS Hire from local agency	Hire Form	USS - Local Agency or Agency Transfer
USS Hire from SOK agency	Hire Form	USS - Local Agency or Agency Transfer
USS Hire from current USS employee	Hire Form	Promotion / Transfer – USS to USS
USS Hire from current hourly student	Hire Form	Hourly Student to University Support Staff
USS Hire from current Temporary USS employee	Hire Form	Temporary Hire to USS Position
USS Hire from current benefit eligible unclassified employee	Hire Form	Promotion / Transfer - Unclassified to USS
USS Non-resident hire	Hire Form	Non-Resident Employee - USS
USS Temporary New or rehire	Hire Form	Temporary Hire
USS Temporary from current benefits eligible USS employee	Hire Form	Temporary to Temporary
USS Hire from Retiree rehire	Hire Form	Temporary Hire
Type of Hire	Onboarding Form	Onboarding Workflow
Non-University Students	Hire Form	Non-University Student Hire

User Guide

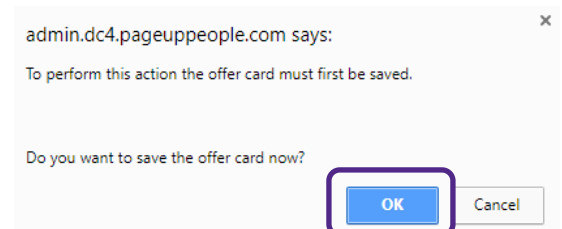
II. Offer Documents

Within the **Offer documents** section, there are two options on how to create the offer documents which will send to the candidate through their applicant portal. These options are **Add document** and **Merge document**.



a. Creating an auto-filled document

Step 1: Select **Merge document**. **Merge document** has been set up to merge data from the **PageUp** applicant tracking system into the offer letters and contracts to be created. **Note: you will not be able to select Merge document until all mandatory fields are completed.**



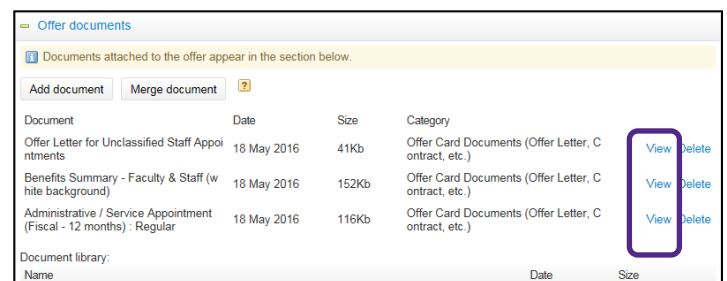
Step 2: Once you click **Merge document**, the system will ask if you want to save the offer card. Click **OK**.

Step 3: You will select the appropriate offer letter template and/or contract template. To select, place a check in the box in front of the appropriate selected document.

Step 4: Select **View** if you would like to see the document prior to selecting.

Step 5: Select **Merge** and information will populate in the document.

Step 6: Once merged, the document is attached to the **Offer Card** and ready for editing. To edit, click on **View** next to the document.



Step 7: Review the merged document for accuracy. Pay attention to the fields which are **highlighted in yellow**. These will need to be edited accordingly. Once editing has been completed, **remove the yellow highlight**.

Step 8: Save the document to your desktop or to a file on your computer. **Save the document titled beginning with the individual's name and then the title of the document.**



User Guide

*For example, Harry Hire is offered the position. You have just edited the initial appointment document and ready to save for upload. You will save on your desktop or computer file as **Harry Hire Initial Appointment**. For the offer letter, you would name it as **Harry Hire Offer Letter**.*

Step 9: Upload the final document into the offer card by clicking on **Add document**. This will prompt the *Upload a new document* window.

Step 10: Click **Upload file**. Locate the file on your computer.

Step 11: The **Document category** needs to be **Offer Card Documents (Offer Letter, Contract, etc.)**.

Step 12: Type **Offer Letter** or **Initial Appointment** (Depending on the document type) for the **Title**.

Step 13: Click **Save and add another** in order to upload the next document. **NOTE: If there is only one document, click Save and close.**

Step 14: Click **Save and close** once the final document is uploaded.

Step 15: Delete the original merged documents. The documents in the **Document** section will be the documents which will be reviewed by the approvers and seen by the candidate when reviewing the contingent offer.



User Guide

III. Approval Process

The **Approval process** is initiated when the offer is saved. All required fields must be completed. Select the appropriate approval process for your college from the drop down list. The selection will generate the fields to be populated for the appropriate individuals at each level. **NOTE: If you don't see the appropriate approval process for your college, contact your Talent Acquisition partner to set up the approval process.**

Each approver may fill in fields where any information is missing or documents for the hire. Once they approve the offer card, it is forwarded to the next approver.

a. Submit the Offer Card

Before you start the offer card process, **review** the offer card to confirm all information is correct and completed. Click **Save and close**.

Extending the offer:

The originator of the offer card will be notified when the final offer approval is completed.



NOTE: Talent Acquisition will be responsible for changing statuses on the individuals who have had an offer card created for them from this point forward. If you update the status on these individuals, this will negatively affect the individual's onboarding process.

When the new hire either accepts or declines the contingent offer, PageUp will automatically update the status in the system to **Offer accepted** or **Offer declined**.

After the contingent **offer is electronically accepted**, Talent Acquisition will initiate the background check (if applicable) and new hire will begin the electronic onboarding process.