Offer Process Guide

Preparing the Offer

1. Hover over the selected applicant, drag and drop into **"Verbal Offer (Prepare Offer)."** A side pop-up window will appear confirming the status change. Click ***Move Now***.

2. The next window will populate the ***Offer Details*** screen. Navigate down the screen completing all required **(*)** and known fields starting at the ***Offer Details*** section.
   a. **Note:** The Offer Card will feed important data into an applicant's offer letter.

3. At the Onboarding Details section, complete the following fields:
    a. <u>Onboarding Form:</u> New hire form
    b. <u>Onboarding Workflow:</u> Onboarding
    c. <u>Reports to Manager:</u> Manager the new hire is reporting to.
    d. <u>HR Rep/Onboarding Delegate:</u> Agency HR Rep who will be responsible for overseeing onboarding process.
    e. <u>HR Rep/Onboarding Delegate 2:</u> Secondary agency HR Rep who will be responsible for overseeing onboarding process (if applicable)
    f. <u>Offer Signed By:</u> Recruiter
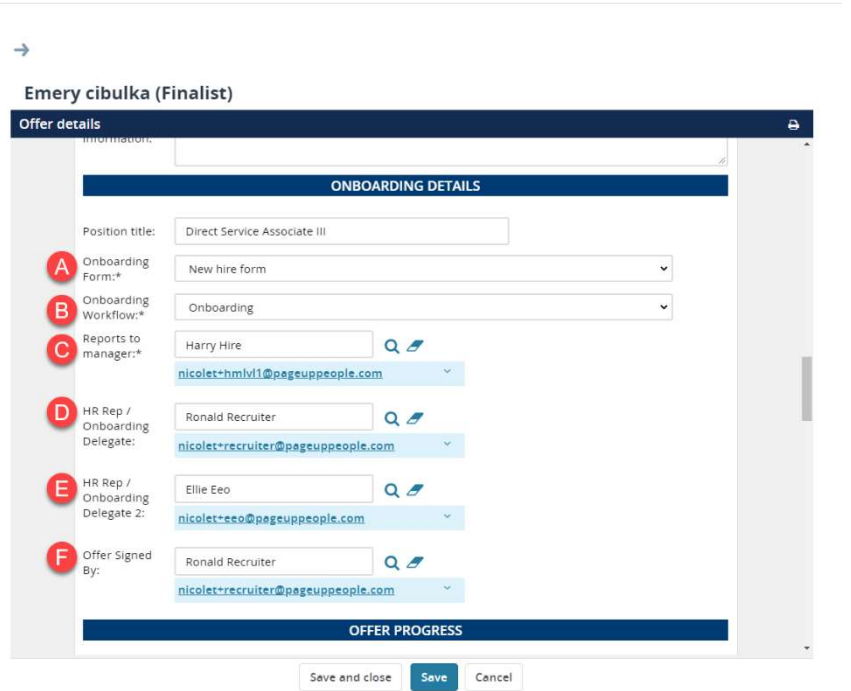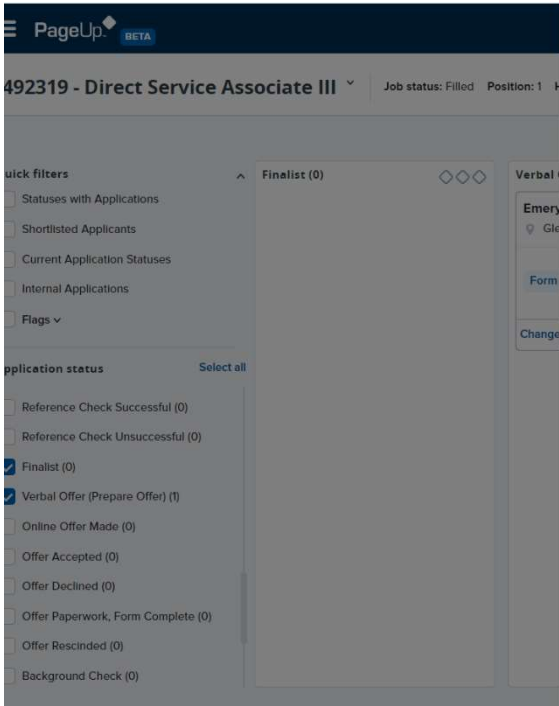
4. Scroll to the *Offer Documents* section, click *Merge Document* then *Ok* to begin the offer letter build.
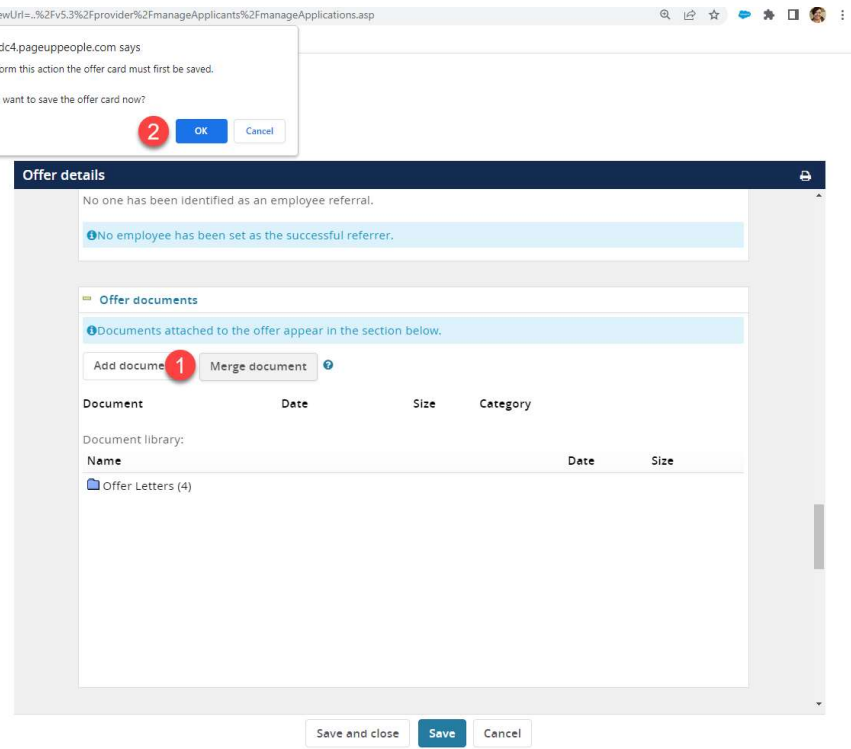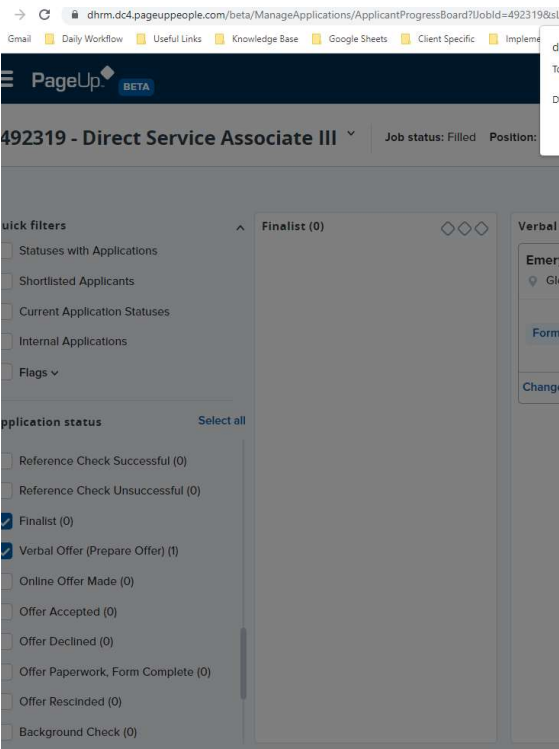
5. When the *Document Merge* pop-up window appears, select the appropriate offer letter then click *Merge*.
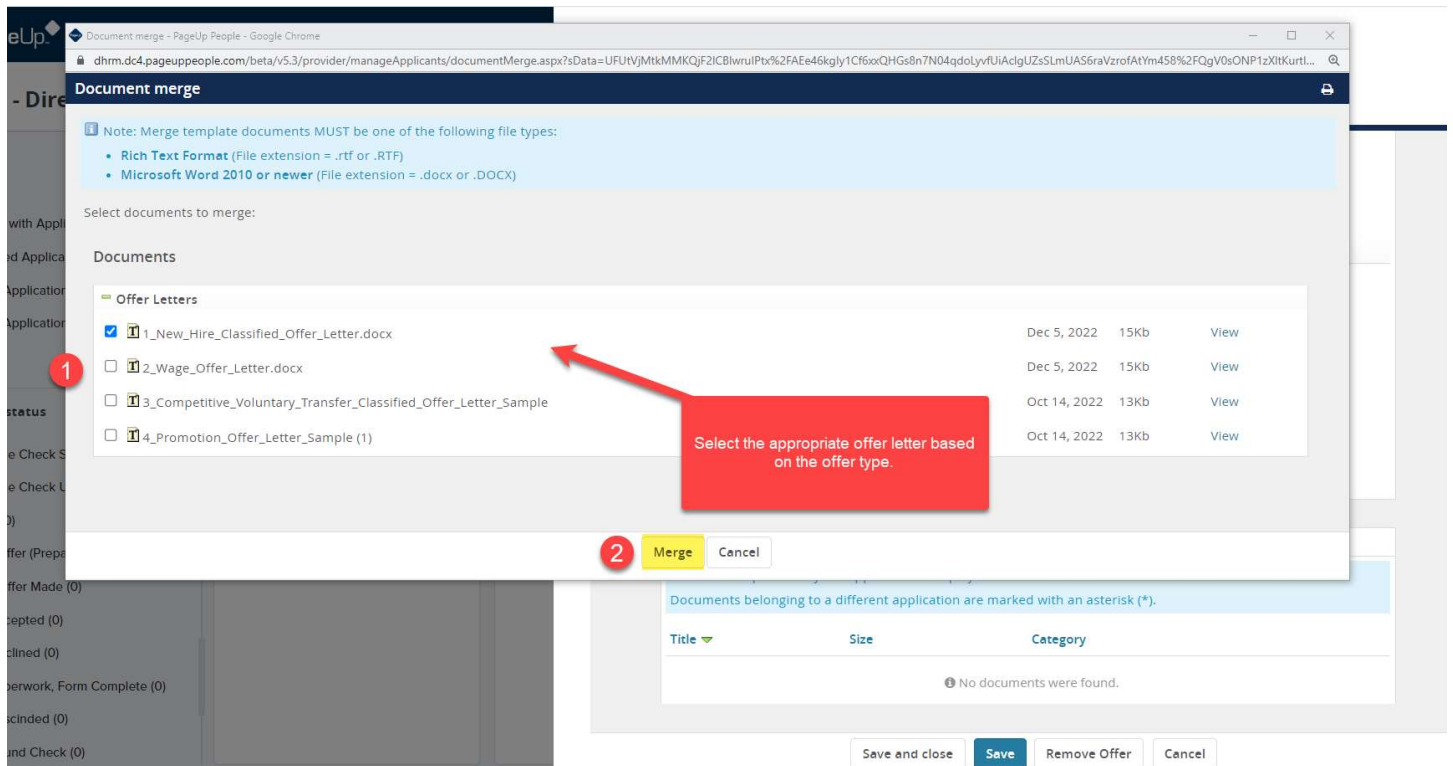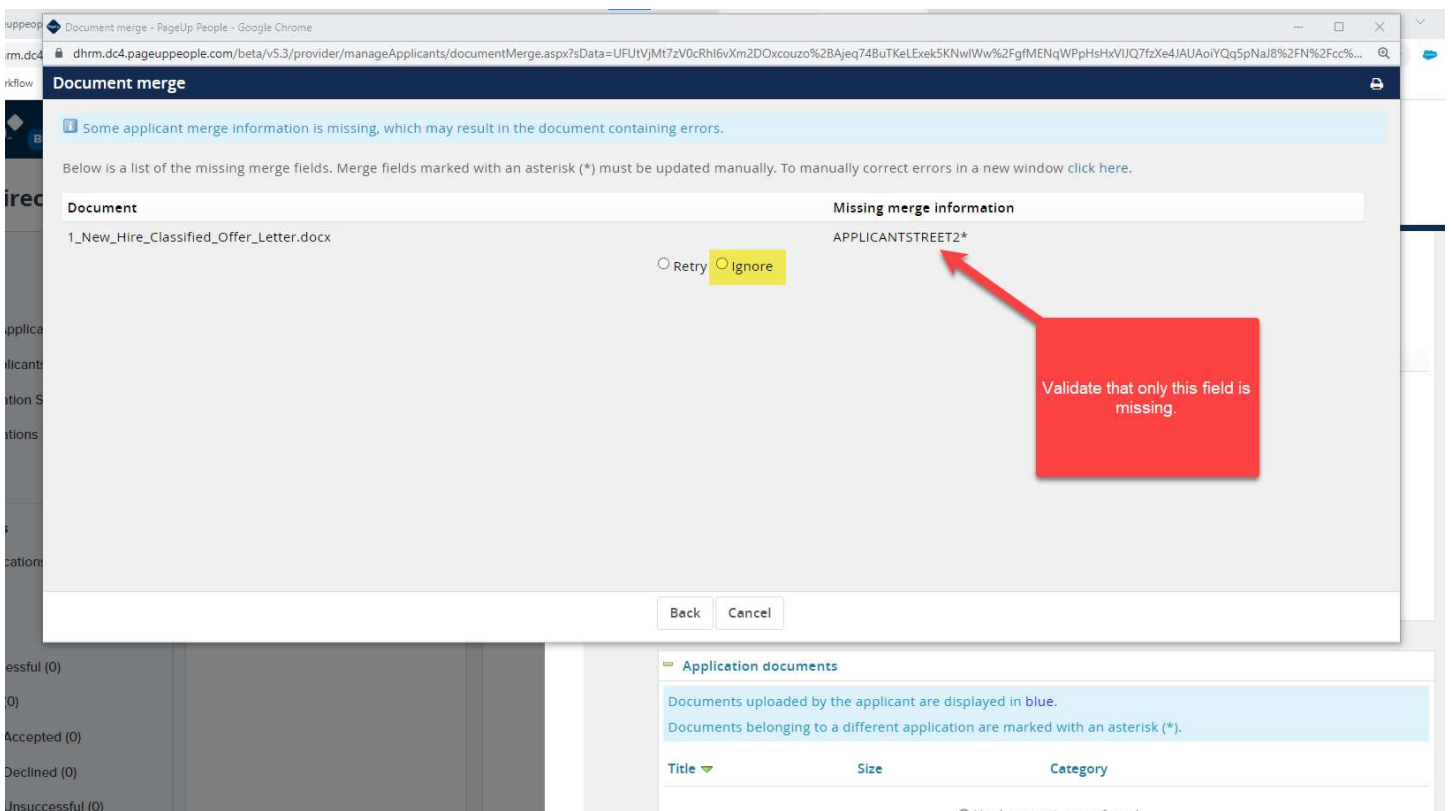

6. The offer letter will validate that all required fields have successfully merged. The only potential field that should not be validated is **APPLICANTSTREET2**, if this is true, then click *Ignore*.
   a. **Note:** If additional fields appear, click Back then Cancel to finish the offer card as missing fields have not been populated on the Offer Card.

7. Once the offer letter has been added to the job card, scroll to the ***Approval Process*** section to begin the approval process. Complete the below field:
   a. <u>Originator:</u> User completing the Offer Card, this should default to the logged in User.
   b. <u>Approval Process:</u> Select Offer Approval Process.
   c. <u>Next Level Manager:</u> Manager who Hiring Manager reports to.
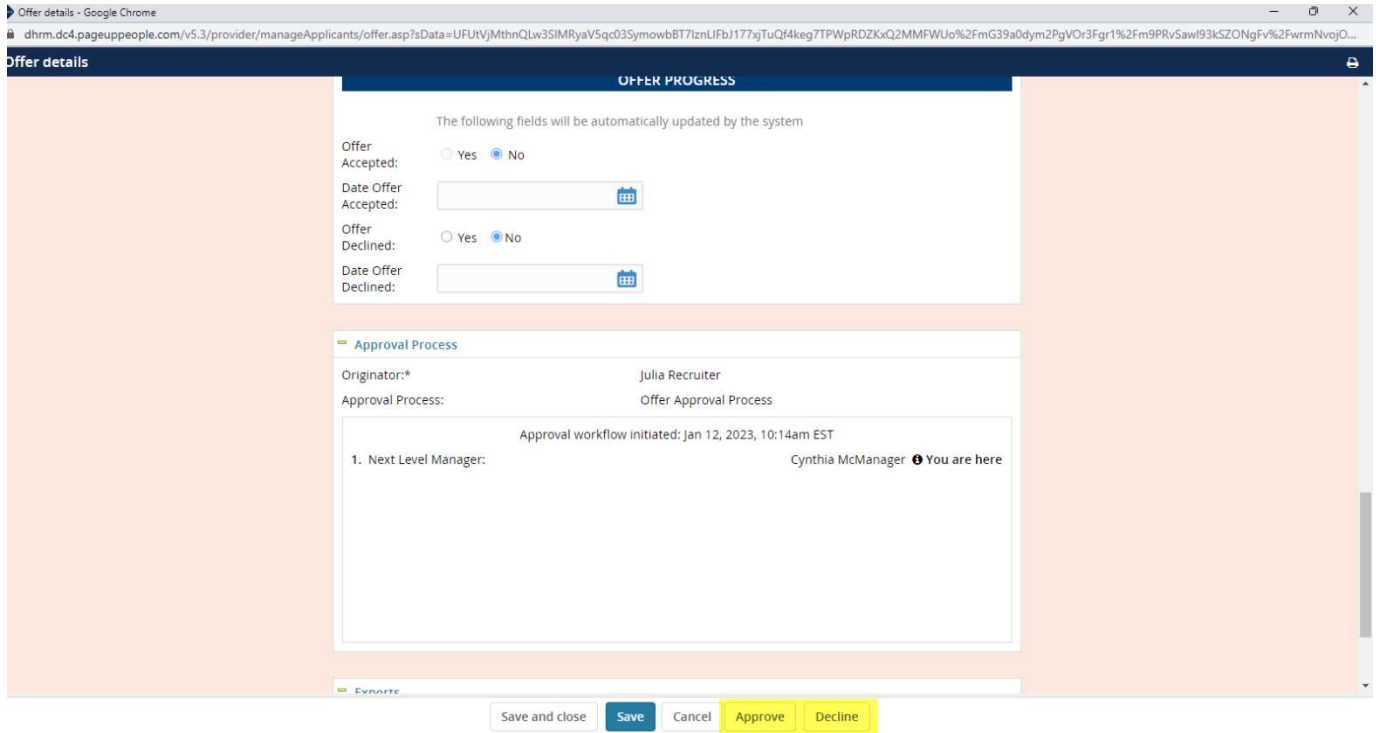
8. Click ***Save and Close*** to begin the approval process.
   a. **Note:** Further action cannot be taken until all users selected in the approval process have reviewed and approved the offer.
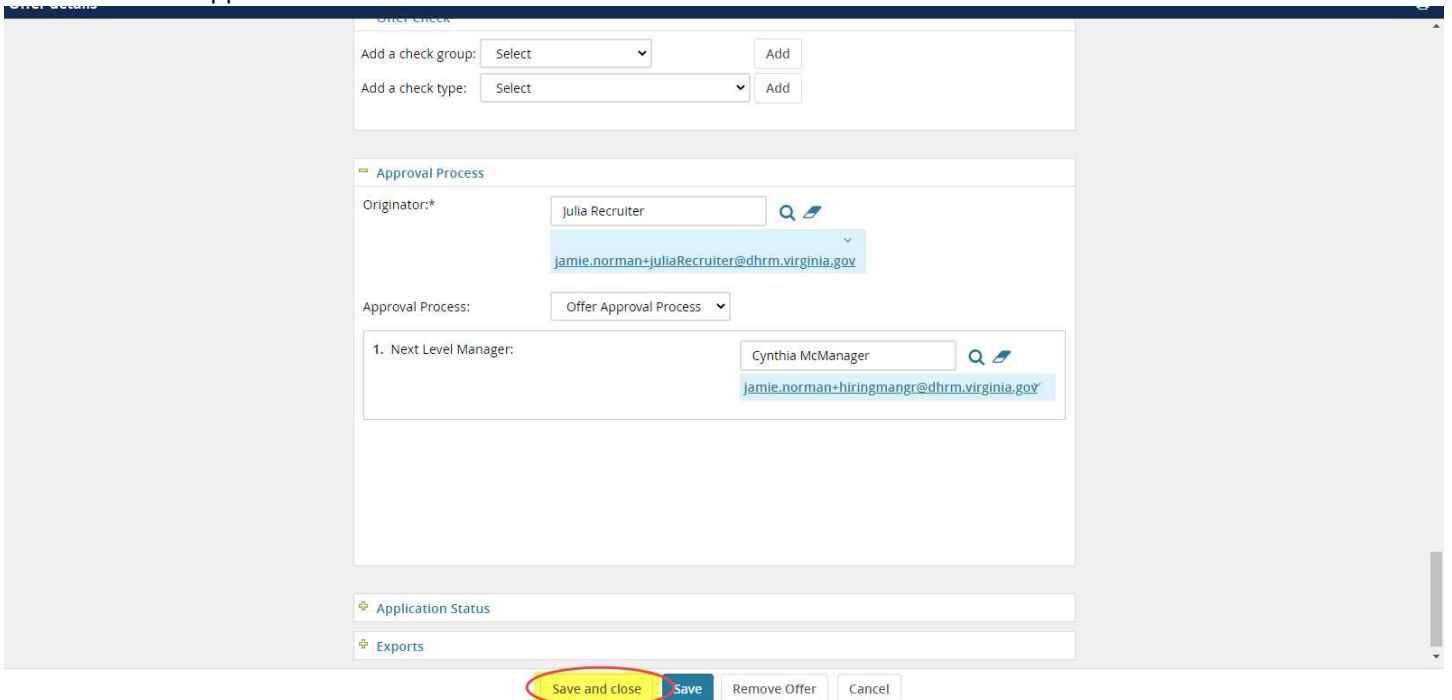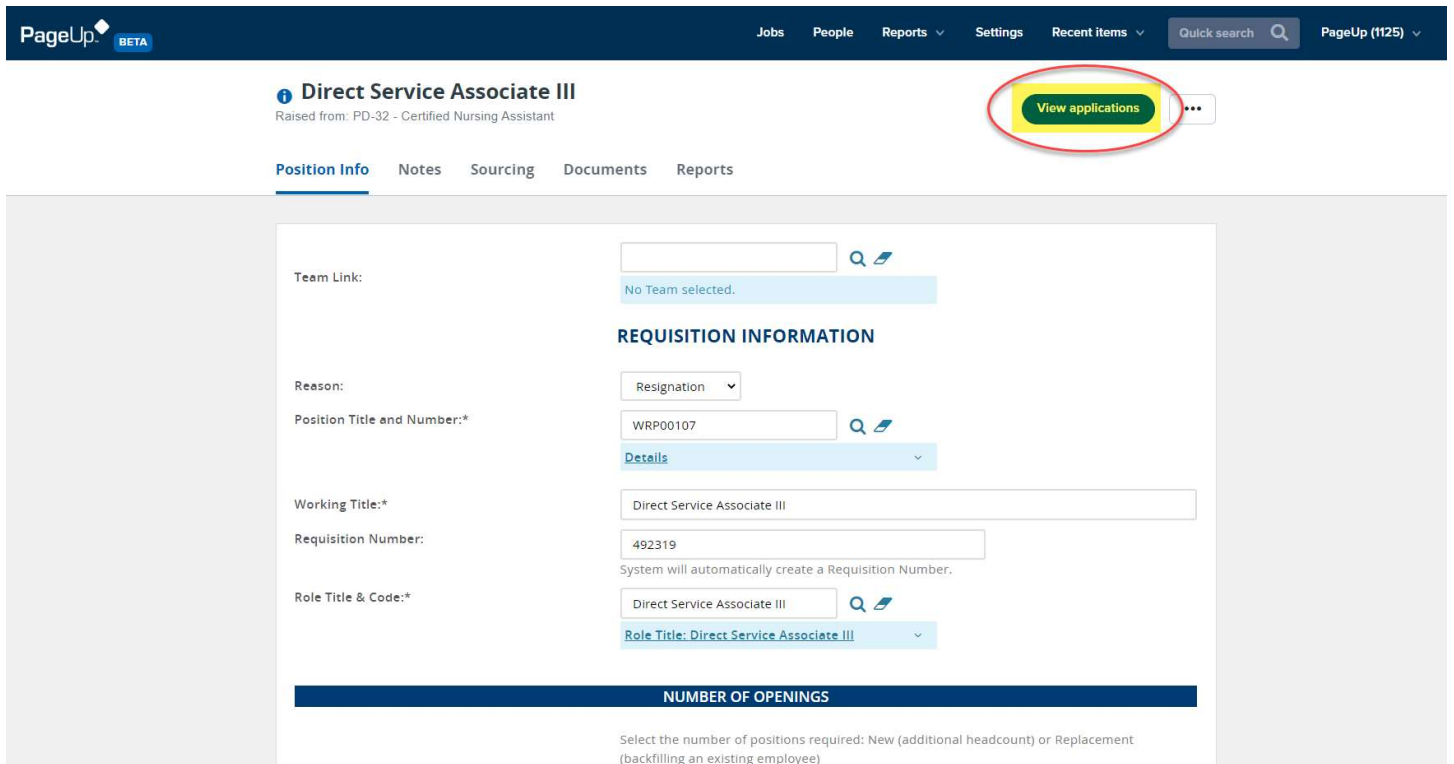

## Sending an Online Offer (Offer Letter)

1. Once the offer has been approved, the Originator (Recruiter) will receive a notification via email.
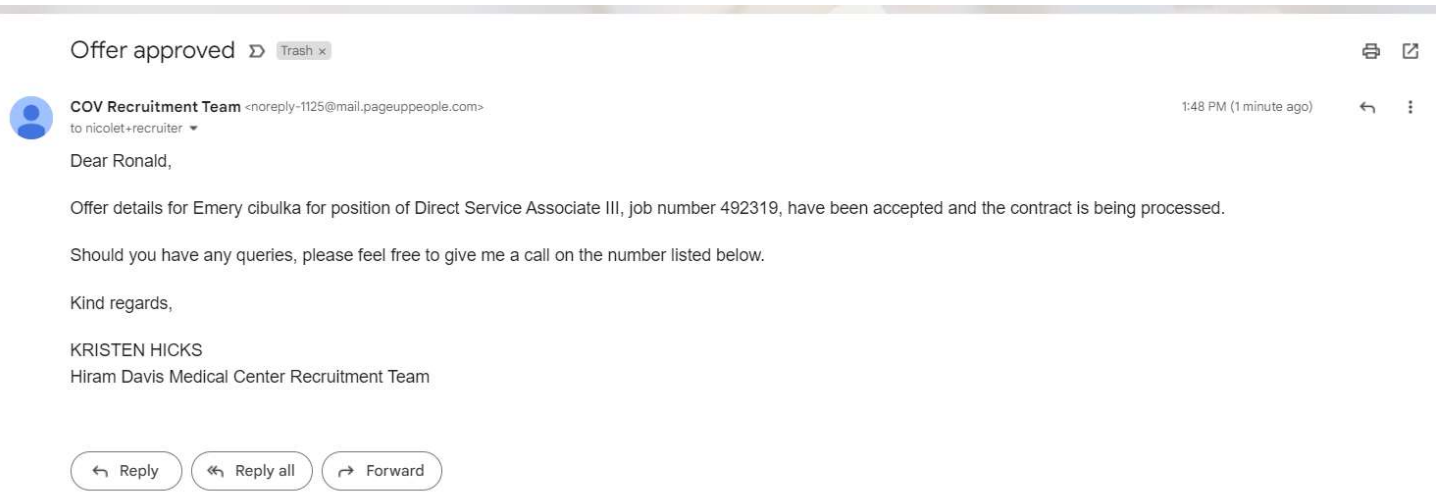
2. Log into PageUp to send the formal offer letter to the applicant. Navigate to the applicable job, click **View Applications.**

3. Hover over the selected applicant, drag and drop into "Online Offer Made." A side pop-up window will appear confirming the status change. Click Move Now.
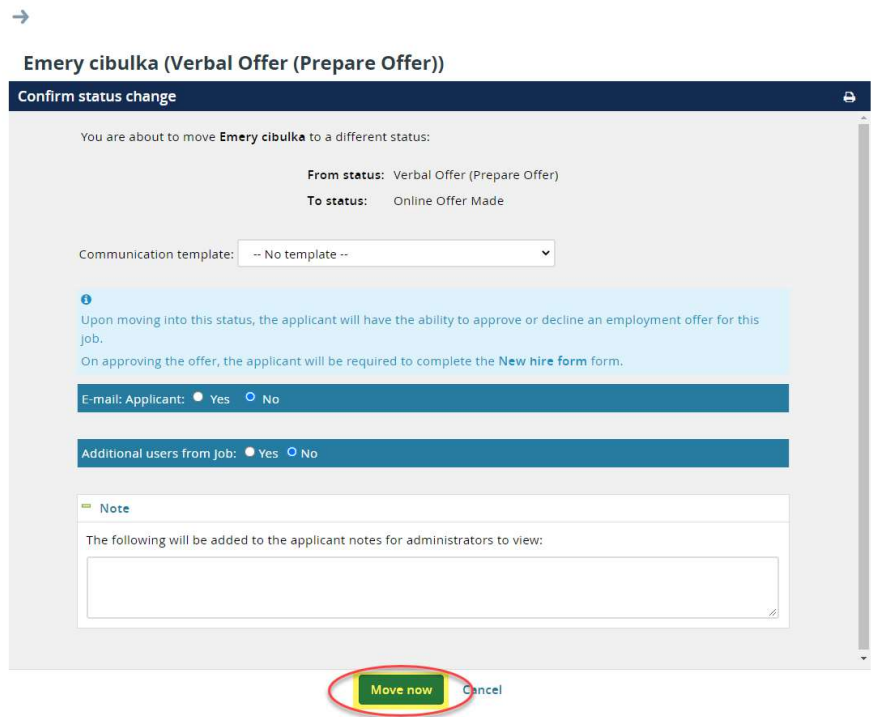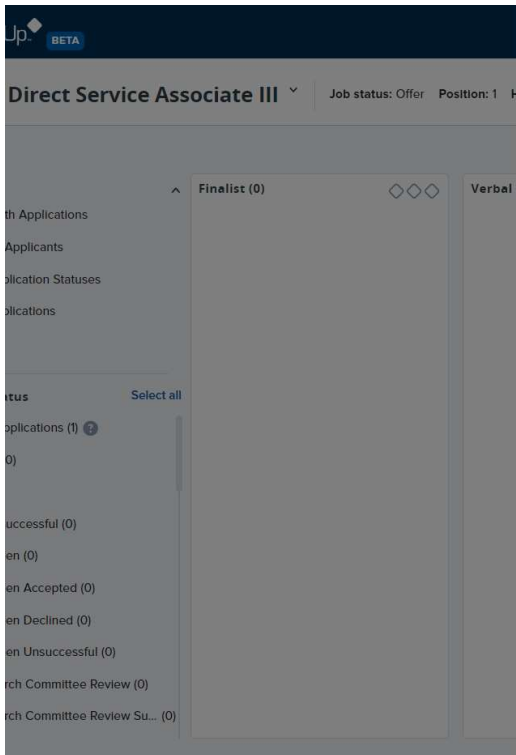
4. The applicant will receive an email notification triggering them to act against the offer. Once action has been taken, a notification will trigger advising if the applicant has accepted or declined the online offer.