

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**.

The screenshot shows the PageUp interface with a sidebar on the left containing filters and application status options. The main area displays a pop-up window titled "Emery cibulka (Finalist) Confirm status change". The pop-up contains the following information:

- You are about to move **Emery cibulka** to a different status:
- From status:** Finalist
- To status:** Verbal Offer (Prepare Offer)
- Communication template: -- No template --
- E-mail: Applicant: Yes No
- Additional users from Job: Yes No
- Additional users from Job:
 - Agency Director
 - Recruiter
 - Hiring Manager / Panel Head
 - HR Rep / Onboarding Delegate 2
 - Originator
 - Dean
 - Interview Panel Member
 - Originator
- Buttons: **Move now** (highlighted with a red circle) and Cancel

A red callout box with the text "An internal communication will trigger to go out to users on the job upon status change." points to the "Move now" button.

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.

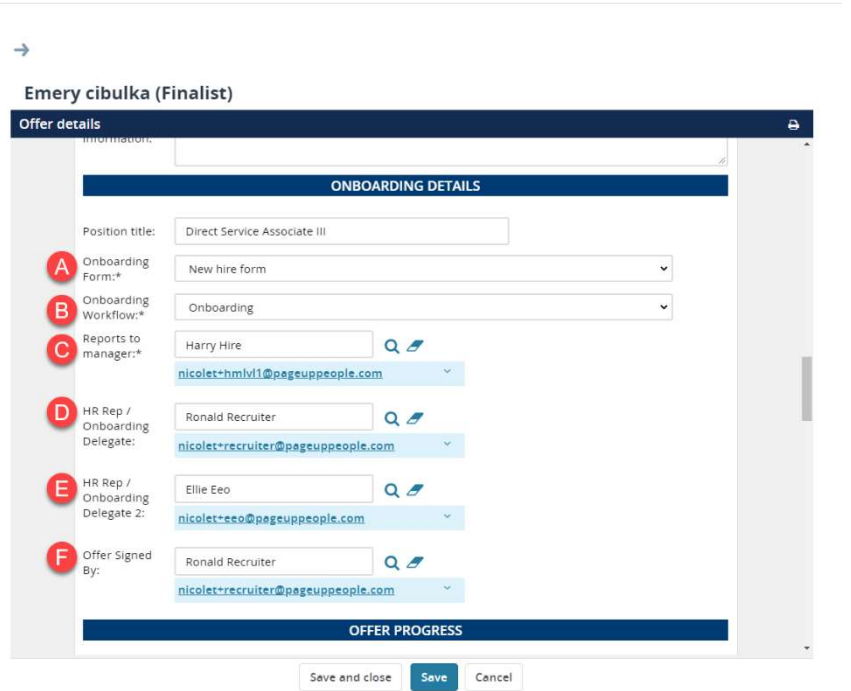
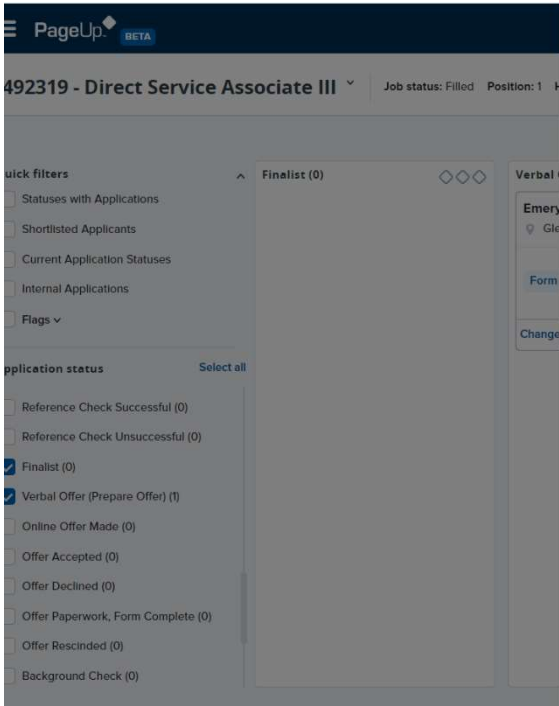
The screenshot shows the PageUp interface with a sidebar on the left. The main area displays a pop-up window titled "Emery cibulka (Finalist) Offer details". The pop-up contains the following information:

- Positions table:

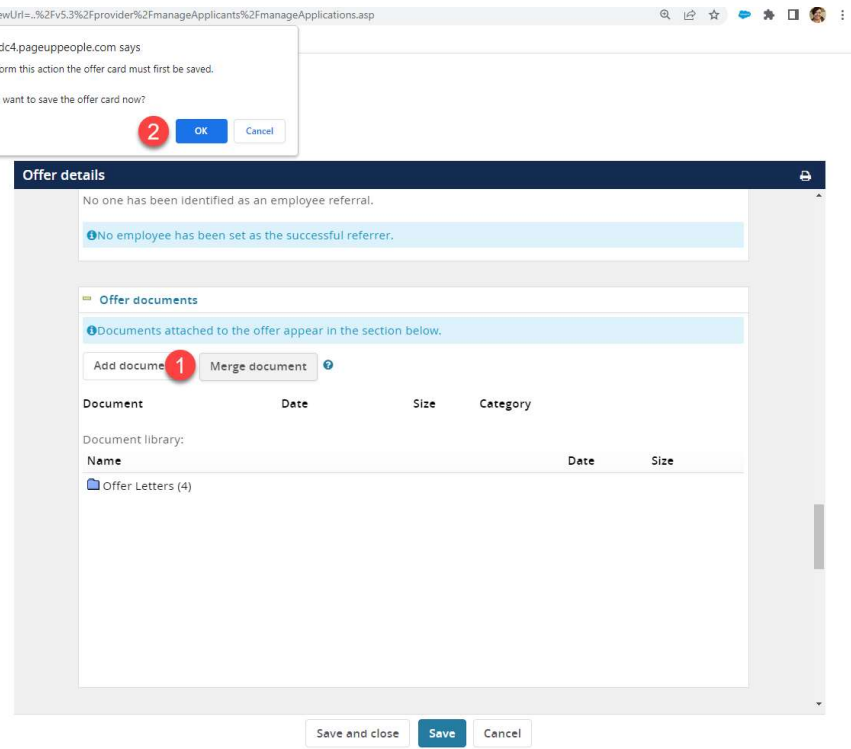
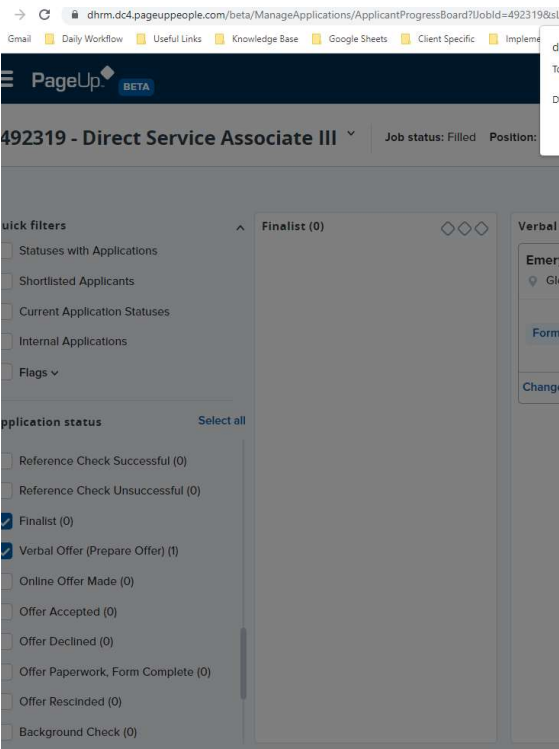
Position Number	Type:	Applicant	Application Status
WRP00107	Replacement	cassandra1 cibulka	Hired
	New	-	-
- OFFER DETAILS** section:
 - Offer Type: Select
 - Start date:* Jan 16, 2023
 - Day One Reporting Time:* 09:00 am
 - Please enter the "TIME" above in the following format - 00:00 am/pm
- SALARY DETAILS** section:
 - Pay Band: 3
 - Annual salary:
 - Semi Monthly Pay:
- Buttons: Save and close, **Save**, Cancel

A red callout box with the text "Start completing the offer card here." points to the "OFFER DETAILS" section header.

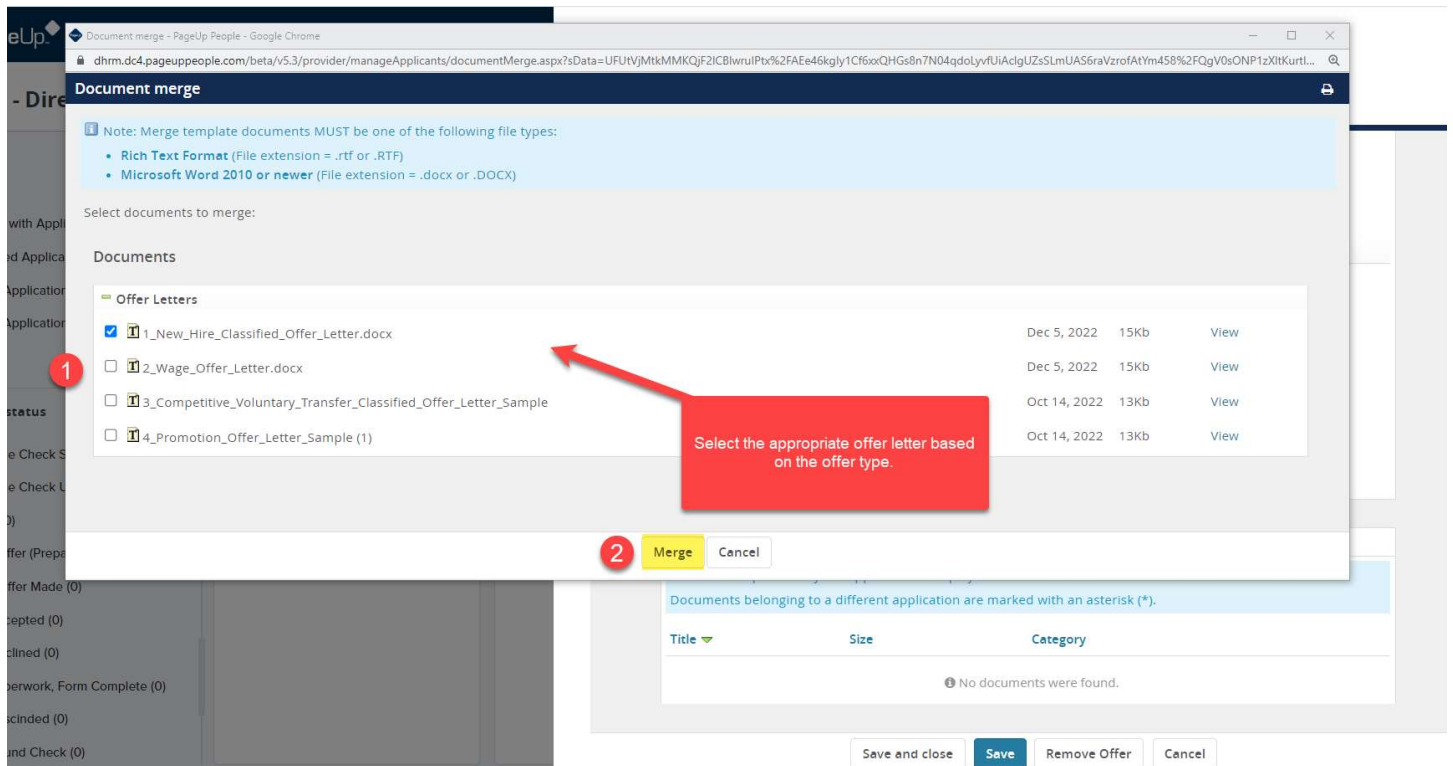
3. At the Onboarding Details section, complete the following fields:
 - a. Onboarding Form: New hire form
 - b. Onboarding Workflow: Onboarding
 - c. Reports to Manager: Manager the new hire is reporting to.
 - d. HR Rep/Onboarding Delegate: Agency HR Rep who will be responsible for overseeing onboarding process.
 - e. HR Rep/Onboarding Delegate 2: Secondary agency HR Rep who will be responsible for overseeing onboarding process (if applicable)
 - f. Offer Signed By: Recruiter



4. Scroll to the **Offer Documents** section, click **Merge Document** then **Ok** to begin the offer letter build.

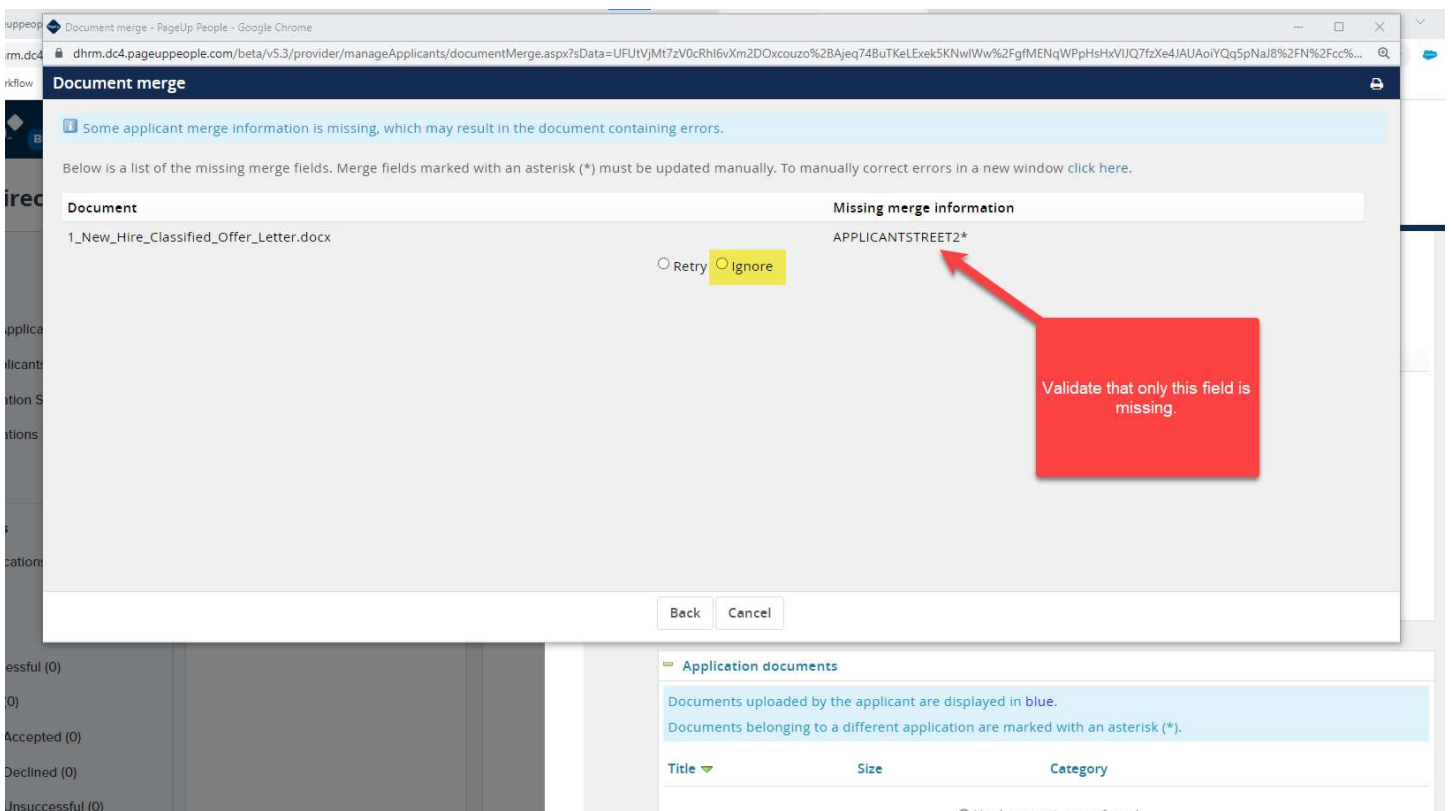


5. When the **Document Merge** pop-up window appears, select the appropriate offer letter then click **Merge**.

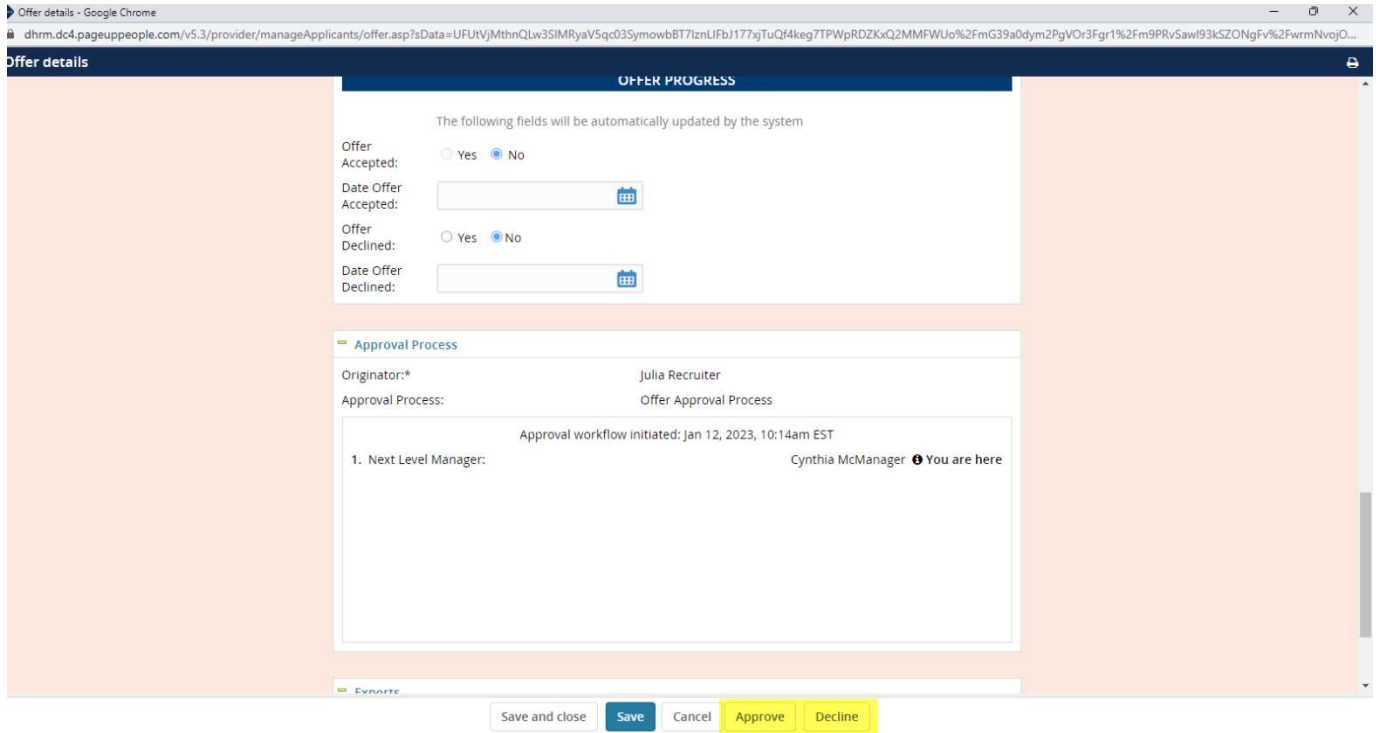


6. The offer letter will validate that all required fields have successfully merged. The only potential field that should not be validated is **APPLICANTSTREET2**, if this is true, then click **Ignore**.

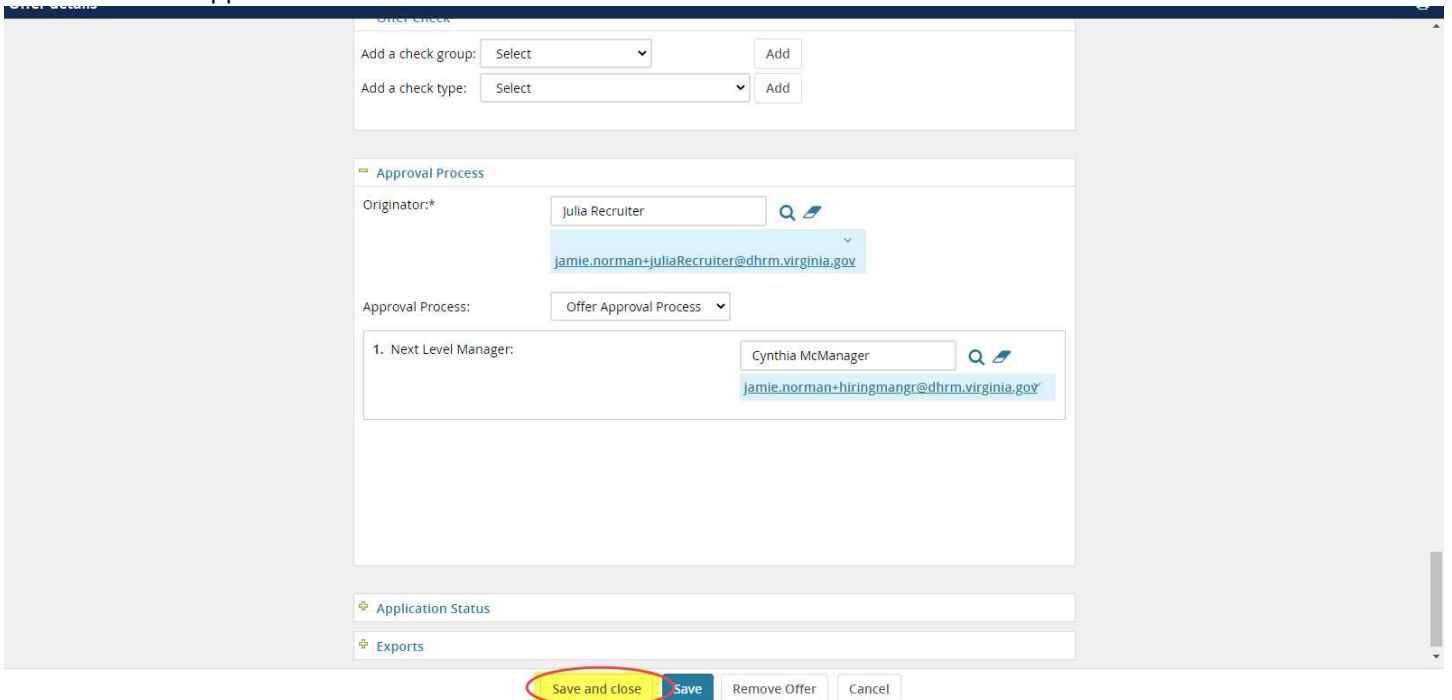
- Note:** If additional fields appear, click Back then Cancel to finish the offer card as missing fields have not been populated on the Offer Card.



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. Originator: User completing the Offer Card, this should default to the logged in User.
 - b. Approval Process: Select Offer Approval Process.
 - c. Next Level Manager: Manager who Hiring Manager reports to.

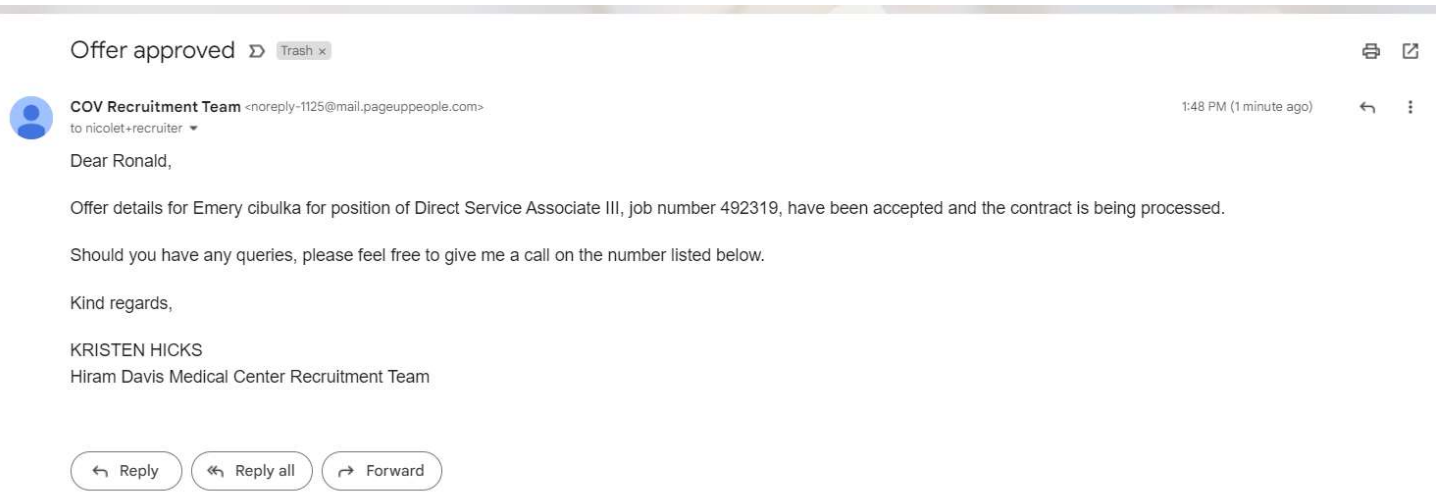


8. Click **Save and Close** to begin the approval process.
 - a. **Note:** Further action cannot be taken until all users selected in the approval process have reviewed and approved the offer.

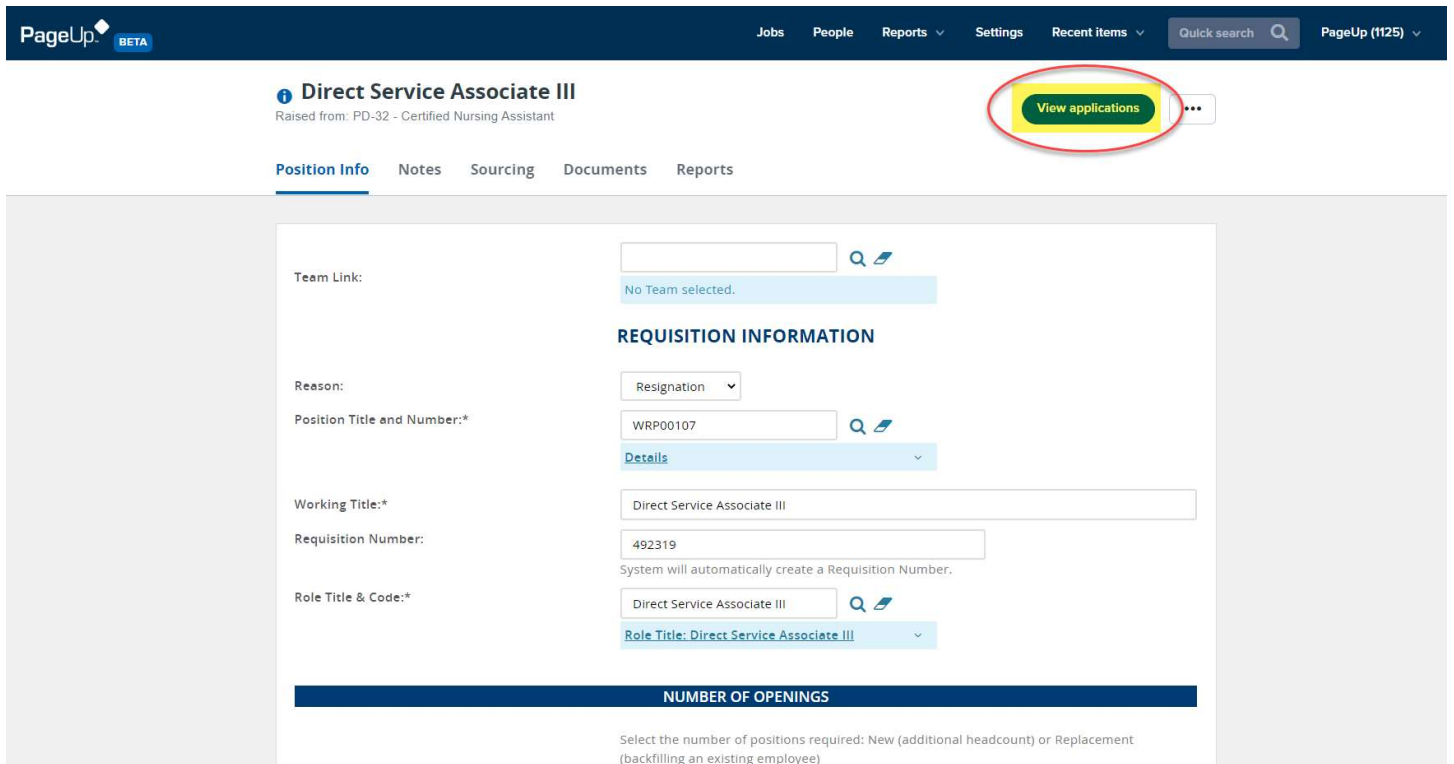


Sending an Online Offer (Offer Letter)

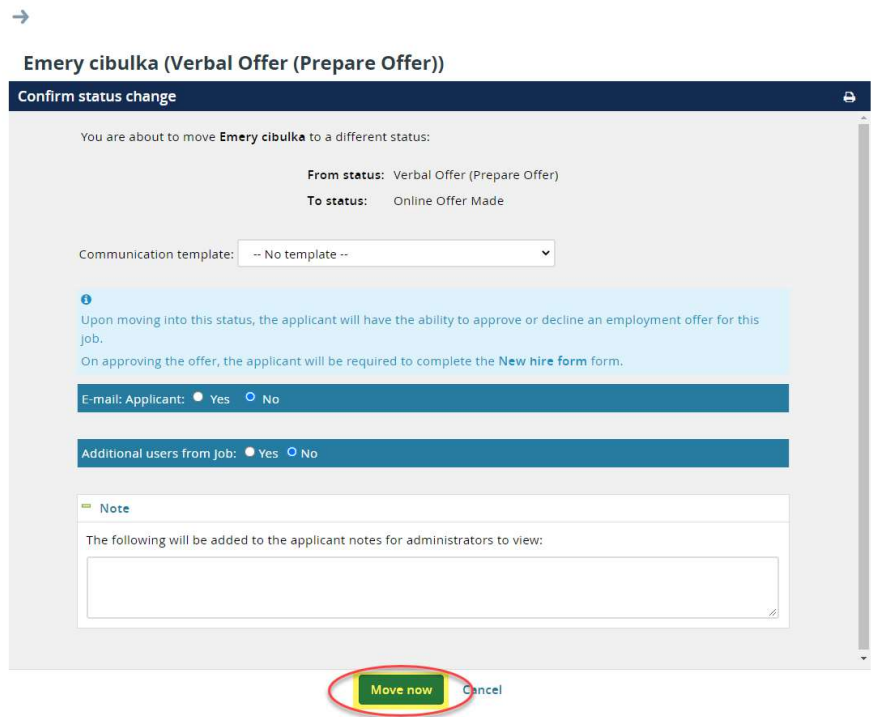
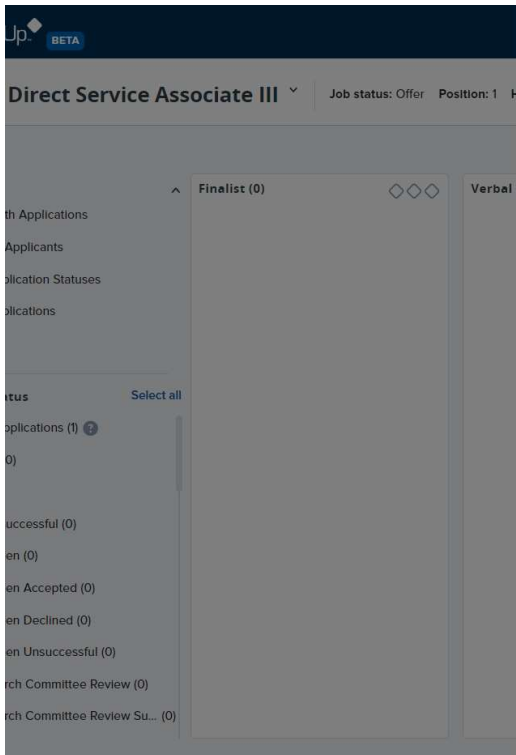
1. Once the offer has been approved, the Originator (Recruiter) will receive a notification via email.



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.