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*.

	\rightarrow	
492319 - Direct Service Associate III 🎽 Job status: Filled F	Emery cibulka (Finalist)	
	Confirm status change	•
Quick filters A Finalist (0)	You are about to move Emery cibulka to a different status:	Î
Statuses with Applications	From status: Finalist	
Shortlisted Applicants	To status: Verbal Offer (Prepare Offer)	ł
Current Application Statuses	Communication template: No template 🗸	ļ
Flags V An internal communication will trigger to go out to users on the job upon status change.	E-mail: Applicant: ● Yes O No	
Application status Select all	Additional users from Job: O Yes O No	
Reference Check Successful (0)	Additional users from Job	
Reference Check Unsuccessful (0)	Agency Director 🗹 Originator	
Finalist (0)	Recruiter 🗆 Dean	
Verbal Offer (Prepare Offer) (1)	Hiring Manager / Panel Head Interview Panel Member	
Online Offer Made (0)	Additional users from Offer	
	HR Rep / Onboarding Delegate 2 Originator	
Offer Declined (0)	Move now sancel	*

2. When the offer is being sent to a current or previous employee of the state, you will need to enter their information here. This will enable the applicant ID to match the employee account during the 2-way integration back to Cardinal.

Current or p	Current or previous employee details									
6 If the applicant you are extending an offer to is a current or previous employee, then use the lookup below to select their employee profile. If the applicant is not a current or previous employee, or if the applicant is not found in the search, please leave the field blank.										
Employee number:										
Employee.										
	JAMIE.NORMAN@DRRM.VIRGINIA.GOV									
	Position No:									
	Position Title:									
	View employee card									

- 3. 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. **<u>Note</u>:** The Offer Card will feed important data into an applicant's offer letter.

			→				
492319 - Direct Service As	sociate III 🎽 🗉	Job status: Filled F	Emery cibu	ulka (Final	list)		
			Offer details				
Quick filters	 Finalist (0) 	000	Positie WRP	on Number 00107	Type: Replacement New	Applicant cassandra1 cibulka -	Application Statu Hired
Current Application Statuses			-		0	OFFER DETAILS	
Flags V			Offer Type: Start date:*	Select Jan 16, 2023	;		Start completing
Application status Select a	u 		Day One Reporting Time:*	09:00 am			
Reference Check Successful (0)				Please enter t	he "TIME" above in th SA	he following format - 00:00 ar ALARY DETAILS	n/pm
Finalist (0)Verbal Offer (Prepare Offer) (1)			Pay Band:	3			
Online Offer Made (0) Offer Accepted (0)			Annual salary: Semi Monthly				
Offer Declined (0)			Pav [.]		Save and c	lose Save Cancel	

- 4. 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. Offer Signed By: Recruiter

				<i>→</i>				
492319 - Direct Service Ass	ociate III 🎽	Job status: Filled Po	sition: 1 H	Emery cibulka (F	inalist)			
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uick filters	Finalist (0)	000	Verbal (ONBOARDING DETAILS	<i>li</i>	
Shortlisted Applicants			© Gle	Position title:	Direct Service Associate III			
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Flags ∽			Change	B Onboarding Workflow:*	Onboarding		~	
oplication status Select all				C manager:*	Harry Hire	Q Ø		
Reference Check Successful (0)				HR Rep / Onboarding	Ronald Recruiter	Q /		
Reference Check Unsuccessful (0)				Delegate:	nicolet+recruiter@pageupp	eople.com Y		
Verbal Offer (Prepare Offer) (1)				HR Rep / Onboarding Delegate 2:	Ellie Eeo	Q Ø		
Online Offer Made (0)					nicolet*eeo@pageuppeople	e.com		
Offer Accepted (0)				Offer Signed By:	Ronald Recruiter	Q /		
Offer Declined (0)					nicolet+recruiter@pageupp	eople.com ~		
Offer Rescinded (0)						OFFER PROGRESS		
Background Check (0)					Save	and close Save Cancel		

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

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Gmail 📙 Daily Workflow 📙 Useful Links 📙 Know	iledge Base 🛛 📙 Google Sheets	🧧 Client Specific 📙 I	Impleme dhrm.dc4.pag	euppeople.com savs							
E PageUp.			To perform this Do you want to	action the offer card must first be saved.							
492319 - Direct Service Ass	ociate III 🎽 🤉	ob status: Filled Pos	ition:	2 ок	Cancel						
			0	ffer details							₽
				No one has been identified	as an employee referral.						-
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pplication status Select all											
Reference Check Successful (0)				Name				Date	Size		
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Verbal Offer (Prepare Offer) (1)											
Online Offer Made (0)											
Offer Accepted (0)											
Offer Declined (0)											
Offer Paperwork, Form Complete (0)											
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Background Check (0)					Save and c	lose Save	Cancel				

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

Up.• <	Document merge - PageUp People - Google Chrome				- 🗆 X
	dhrm.dc4.pageuppeople.com/beta/v5.3/provider/manageApplicants/documentMerge.aspx?sData	=UFUtVjMtkMMKQjF2ICBlwruIPtx%2FAE	e46kgly1Cf6xxQHGs8n7N04qdoLyvf	JiAclgUZsSLmUAS6raVzrofAtYm458%	2FQgV0sONP1zXItKurtI Q
Dire	Document merge				Ð
	Note: Merge template documents MUST be one of the following file types:				
	 Rich Text Format (File extension = .rtf or .RTF) Microsoft Word 2010 or newer (File extension = .docx or .DOCX) 				
th Appli	Select documents to merge:				
Applica	Documents				-
plicatior	Offer Letters				
plicatior	☑ 1_New_Hire_Classified_Offer_Letter.docx			Dec 5, 2022 15Kb	View
1	□			Dec 5, 2022 15Kb	View
tus	Image: Competitive_Voluntary_Transfer_Classified_Offer_Letter_Sample			Oct 14, 2022 13Kb	View
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- 7. 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. <u>Note:</u> If additional fields appear, click Back then Cancel to finish the offer card as missing fields have not been populated on the Offer Card.

uppeop	🗢 Document merge - PageUp People - Google Chrome		– 🗆 X 🗡
rm.dc4	dhrm.dc4.pageuppeople.com/beta/v5.3/provider/manageApplicants/documentN	terge.aspx?sData=UFUtVjMt7zV0cRhl6vXm2DOxcouzo%2BAjeq74BuTKeLExek5KNwlWw%2FgfMENqWPpHsHxVUQ7fzXe4JAUAoiYQq5pN	aJ8%2FN%2Fcc% 🍳 🍵
rkflow	Document merge		₽
- ■	Some applicant merge information is missing, which may result in	the document containing errors.	
	Below is a list of the missing merge fields. Merge fields marked with a	n asterisk (*) must be updated manually. To manually correct errors in a new window click here.	
irec	Document	Missing merge information	
applica dicante ation S ations	1_New_Hire_Classified_Offer_Letter.docx	APPLICANTSTREET2*	
		Back Cancel	
essful ((0)	Application documents	
(0)		Documents uploaded by the applicant are displayed in blue.	
Accepte	ed (0)	Documents belonging to a different application are marked with an asterisk (*).	
Decline	ed (0)	Title 🔻 Size Category	
Unsucc	cessful (0)		

- 8. 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>Hiring Manager</u>
 - d. <u>Next Level Manager:</u> Manager who Hiring Manager reports to.
 - e. <u>HR Director:</u> Agency HR Director or Supervisor.
 - f. Agency Director

PageUp. [•] _{BETA}		→				
319 - Direct Service Ass	Sociate III * Job status: Filled Po	osition: 1 H Emery	r cibulka (Finalist)			
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el / Search Committee Review (0) rel / Search Committee Review Su (0)				Save and close Save R	Remove Offer Cancel	

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

Direct Service As	sociate III *	Job status: Filled Po	sition: 1 H	Emery cibulka (Finalist)			
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arch Committee Review (0)				- Application Status			

Sending an Online Offer (Offer Letter)

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

Offer approved D Trash ×		\$	Ľ
COV Recruitment Team <noreply-1125@mail.pageuppeople.com> to nicolet+recruiter ▼ Dear Ronald,</noreply-1125@mail.pageuppeople.com>	1:48 PM (1 minute ago)	۴	:
Offer details for Emery cibulka for position of Direct Service Associate III, job number 492319, have been accepted and the contract is being pro	cessed.		
Should you have any queries, please feel free to give me a call on the number listed below.			
Kind regards,			
KRISTEN HICKS Hiram Davis Medical Center Recruitment Team			
(← Reply all ← Forward			

2. Log into PageUp to send the formal offer letter to the applicant. Navigate to the applicable job, click *View Applications.*

PageUp.		Jobs People	Reports ∨	Settings Recent items v	Quick search Q PageUp (1125)
	Direct Service Associate III Raised from: PD-32 - Certified Nursing Assistant Position Info Notes Sourcing Docum	nents Reports		View applications	
	Team Link:	No Team selected.	2		
		REQUISITION INFORMATIO	N		
	Reason:	Resignation 🗸			
	Position Title and Number:*	WRP00107	2 /		
		Details	~		
	Working Title:*	Direct Service Associate III			
	Requisition Number:	492319	initian Number		
	Role Title & Code:*	Direct Service Associate III			
		Role Title: Direct Service Associate III	~		
		NUMBER OF OPENINGS			-
		Select the number of positions required (backfilling an existing employee)	: New (additional	headcount) or Replacement	

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.