Creating the Offer Card

1. Click on applicant who will receive offer.

2. Click on the ‘Actions’ drop down menu:

3. Change the status of the applicant:
4. Select ‘Verbal offer’ when you speak to the applicant to offer him/her the position and click ‘Next’:
5. Confirm this status by clicking on ‘Move now’ (you may add a note at this time if applicable):
6. This will bring up the Offer card. You must fill in all fields marked with an asterisk. This includes the title you have chosen, start date, end date (if applicable), FTE, salary/pay and probation type. You must also choose if a new background check and/or I-9 is required for the hire. This is where you will choose a New Employee starter Form as well as the Onboarding workflow under the Onboarding section. Enter the correct Reports to manager and Onboarding Coordinator.

Sarah Panda Parker (Sarah P Parker)

- **Personal details**
  - Address: 21 N Park St 
    Madison, Wisconsin 
    53715, United States
  - Phone: 5555555555
  - E-mail: fnimarten@wisc.edu
  - Applicant number: 1214

- **Job details**
  - Posting Title: HEPATOLOGY & TRANSPLANT HEPATOLOGY PHYSICIAN (A534250-MEDICAL SCHOOL/MEDICINE/GASTROENT).
  - Division: DIV-MEDICAL SCHOOL
  - Department: DEPT-A5342
  - Site: -
  - Work Type: Faculty Full or Part Time

- **Offer details**
  - Approval status: Pending
  - Date entered: 3 Nov 2016, 7:03 am
  - Application source: Internet - UW-Madison Jobs Website (jobs.wisc.edu) Edit

<table>
<thead>
<tr>
<th>Position no</th>
<th>Type</th>
<th>Applicant</th>
<th>Application status</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAIN72784-AS</td>
<td>New</td>
<td>Train1Christine Train1</td>
<td>JEMS new identification form paperwork complete</td>
</tr>
<tr>
<td>TRAIN72784-AS</td>
<td>New</td>
<td>Lauren Butters</td>
<td>Verbal offer</td>
</tr>
<tr>
<td>TRAIN72784-AS</td>
<td>New</td>
<td>Brian IsSoAwesomeItIsContagious</td>
<td>JEMS new identification form paperwork complete</td>
</tr>
<tr>
<td>TRAIN72784-AS</td>
<td>New</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>TRAIN72784-AS</td>
<td>New</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
A. Delete Title(s) that do not apply - You must delete all non-selected titles for this role. Only leave the offered title in the ‘Selected title and title code’ box.
B. Enter start date
C. If a terminal appointment - enter end date
D. If FTE range - enter correct FTE
E. If University Staff - enter hours per week
F. If exempt - enter annual salary
G. If hourly enter - hourly rate
H. Enter probation type
I. Enter probation length if probation required
**PRE-EMPLOYMENT CHECKS**

<table>
<thead>
<tr>
<th>Is a criminal background check required?</th>
<th>J. Yes</th>
<th>J. No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background checks apply to all vacancies except when hires are made in student hourly employee-in-training and TE appointments or when employees move from another UW campus or state agency unless the vacancy involves a position of trust. If an individual is returning to the UW after less than a one-year absence it is not required that a new check be done unless the employee is moving to a position of trust.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Is an I-9 required? | K. Yes | K. No |

**ONBOARDING**

<table>
<thead>
<tr>
<th>New starter form:*</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding workflow:*</td>
<td>None</td>
</tr>
<tr>
<td>Reports to manager:*</td>
<td>Reports to Manager</td>
</tr>
</tbody>
</table>

| Onboarding Coordinator: | Onboarding Coordinator |

| L. | Select New starter form from dropdown menu |
| M. | Select Onboarding workflow from dropdown menu |
| N. | Reports to Manager will automatically populate from Job Posting (If Reports to Manager has changed, click on Erase icon and enter name of Reports to Manager. Use binoculars icon to search for name if necessary. |
| O. | Onboarding Coordinator will automatically populate with Reports to Manager name. Click on Erase icon and enter name of the Onboarding Coordinator. Use binoculars icon to search for name if necessary. |
7. These fields are system generated fields, user cannot edit.

The following fields will be automatically updated by the system

- Offer accepted:  
  - Yes
  - No
- Date offer accepted:
- Offer declined:  
  - Yes
  - No
- Date offer declined:

8. Near the bottom of the page you will add all documents associated with the offer. There are pre-loaded templates for offer letters as well as attachments. You can upload as many documents as you’d like or compile all of your documents into one upload. You will also have the option to Merge documents.

- Offer documents
- Documents attached to the offer appear in the section below:
  - Add document
  - Merge document

Document library:
- Name
- Date
- Size
- Category

- Offer Letters (14)
- Offer Letter Attachments (2)
Q. To merge documents, click on Merge document. A screen will appear asking you to save the document before the merge can occur. Click OK button.

R. Click on the folder icon and a list of merge documents will populate.

9. Select the offer letter that corresponds with your recruitment and the appropriate “Offer Letter Attachments” then click on Merge. Note: You may elect to use your own appointment letter template versus merging from below list but you should include the ‘Attachment to Offer Letter’ in order to provide the selected candidate with additional required information.
10. You will return to the offer card. Click on View in the Offer document area:

![Offer documents section with View button highlighted.]

11. This will automatically download the merged letter into MS Word format. Click on the Offer/Appointment letter at the bottom of your screen:

![Offer documents section with View button highlighted.]

Last Update: 12/02/16
12. Make necessary edits to the Offer/Appointment letter. Once complete, save the document to your computer:

![Save As](image1)

13. Go back to the Offer documents area. Click on Add document. You will also click here if you elect to use your own documents versus the merged documents.

![Offer documents](image2)

14. The Upload a new document screen populates. Click on Upload file and select the Offer/Appointment letter you saved. The document category will default to Offer Contracts. Enter a title for the document in the ‘Title’ field. Once you have selected your document, click on ‘Save and close’ or ‘Save and add another’ if you have additional documents you would like to upload:

![Upload a new document](image3)
15. View your uploaded Offer/Appointment letter to ensure it is correct (it may take a few minutes to load):

16. **Delete the original Merge document.**

17. A pop-up will appear asking you to confirm deletion. Click OK (this will remove the document from the Offer documents section):

18. **You will also view a list of application documents for the applicant.**
19. Choose your division’s approval process:
20. The approval process for your division will automatically populate. The ‘Originator’ field automatically populates with your name. Fill in the name(s) of the required approver(s) by clicking on the binoculars. If your approval process requires a department and division approver you will be required to fill in both fields. If you are the approver at the department and/or division level click on ‘Save’. If you are not the approver at the department and/or division level click on ‘Save and close’. Once you click on ‘Save and close’ an automatic communication will be sent to the Approver(s) to approve or decline the offer.

21. Once you click ‘Save’ you will receive this message, click ‘OK’ if you have selected the correct approval process.
22. Once you click okay and you are the department approver the following screen will appear. Click the ‘Approve’ button (this will send an automatic communication to the Division Approver to approve or decline the offer). When this is complete, click on ‘Save and close’ to exit.

23. Once the offer card has been approved, conversation with the applicant is complete, negotiations are finalized and background check (if required) is complete change the status again to ‘Online offer made’ and click on ‘Next’:
24. This will bring up the template communication that will be emailed to the Applicant. This template uses merge fields to automatically include the job title, number, your name and email address. You can choose to include Additional users from the Job if applicable. Once you have the communication set, click on ‘Move now’ to send the email to the applicant:

Confirm status change

Upon moving into this status, the applicant will have the ability to approve or decline an employment offer for this job.

E-mail: Applicant:  Yes  No
From:  uwjobs@wisc.edu
Subject:  UW-Madison Job Offer
Message:

Dear Sarah,

As a follow-up to our conversation, this email provides instructions on how to view and accept your appointment letter for the position of HEPATOLOGY & TRANSPLANT HEPATOLOGY PHYSICIAN (A5342504-MEDICAL SCHOOL/MEDICINE/GASTROENTER), TRAIN72784, at the University of Wisconsin-Madison.

In order to view your appointment letter, which outlines the terms and conditions of your employment, please follow the steps below:

1. Go to the University of Wisconsin-Madison jobs website at jobs.wisc.edu. Then click on ‘Login’ and log into your applicant account. If you have forgotten your password, please click on the ‘Forgotten your password’ link. A new password will be generated and sent to your email address.

2. At the top of the screen you will see a yellow bar. Click on the ‘View Offer’ link to review your appointment letter.

3. Please open and review your offer documents before accepting or declining your offer.

4. Once you have opened and viewed all documents, close the documents to return to the previous screen. Check the ‘I have read and agreed to the terms of the offer’ box.

5. If you agree with the details of the appointment letter, please click on the ‘I accept’ button. Click on the ‘I decline’ button if you are no longer interested in this offer.

6. Once you indicate your online acceptance, you will be taken to the ‘New Employee Details’ form. Please fill out the details of the form accordingly. This information is collected to set up your new appointment and is kept secure and confidential.

Should you require further information or have any questions, please contact me.

Thank you,
ERICA FINI-MARTEN
FINIMARTEN@WISC.EDU
University of Wisconsin-Madison

Delay e-mail by:  No delay

Additional users from Job:  Yes  No

Move now  Cancel  Spell check
25. The applicant will log into his/her account to accept or decline the offer as well as review all documents:

26. Once the offer is accepted or declined, you will receive an automated communication notifying you of the offer’s status:

27. If the applicant accepts the offer, they are immediately redirected to the New Employee starter Form. Some information from this form is then fed back into JEMS CHRIIS-HR/JEMS Hire: