

After you have spoken to the candidate and offered him/her the position, you are ready to start the offer process in TREMS. The offer process requires **two** applicant status changes: 1) a move to 'Verbal offer' and 2) a move to 'Online offer made'. You must move the selected candidate to 'Verbal offer' status, complete the Offer Card, and receive Offer Card approval before moving to 'Online offer made' status.



DO NOT use the bulk move feature when moving to 'Verbal offer'. Always open the applicant card for each individual receiving an offer. Using bulk removes critical information from the offer card.

HOW TO: CREATE THE OFFER



After a verbal agreement has been reached with the candidate, it is time to record the offer details on the offer card in TREMS.

1. Click on 'view application' for the applicant who will receive offer.

Submitted	Status	Pref Name	First name	Last name	Phone	Mobile	Email	Country	State	City	Ref. Score	Dup	Undisclosed?	Employee	Source	Sub-source	
6 Sep 2016	New	SJP	Sarah	Parker	6085555555		erica.marten3@gmail.com	United S	New York	New York	0		False		Internet Intranet		View application
6 Sep 2016	Verbal offer	Lauren	Lauren	Butters	414555999		lmkrzywda@gmail.com	United S	Wisconsin	Madison	0		False		Internet Intranet		View application
6 Sep 2016	New	Christine	Christine	Rapplicant	555-555-55		christineray603@gmail.com	United S	Florida	Margaritaville	0		False		Internet Intranet		View application
6 Sep 2016	Interview	julia	julia	Roberts	608-555-63		sbaculik@charter.net	United S	Wisconsin	Madison	0		False		Internet Intranet		View application

2. Click on the 'Actions' drop down menu and choose Change status:

Sarah Parker (SJP)

Address: 6 Fab Lane
New York, New York
12345, United States
Phone: +1 6085555555

E-mail: erica.marten3@gmail.com
Original source: Intranet
Number: 04

View referees
Profile
e-Zines comms hold NO

Applications

HEPATOLOGY & TRANSPLANT HEPATOLOGY PHYSICIAN (A534250-MEDICAL SCHOOL/MEDICINE/GASTROENT) #TRAIN72784-AS Submitted: 6 Sep 2016 via Intranet
View No offer Flags: [Actions](#)

- Add activity
- Add document
- Add document from file
- Add note
- Assign application
- Change status**
- Communicate

3. Select 'Verbal offer' and click 'Next'.

The screenshot shows a 'Change application status' dialog box with a list of status options. The 'Verbal offer' option is highlighted with a blue background and a red box. A red arrow points from the text 'Select 'Verbal offer'' to this option. Another red arrow points from the text 'click 'Next'' to the 'Next >' button at the bottom right of the dialog. The 'Save' button is also visible.

4. Confirm this status and date and click on 'Move now' (you may add a note at this time if applicable).

The screenshot shows a 'Confirm status change' dialog box. It displays the transition from 'New' to 'Verbal offer'. There are fields for 'Communication template', 'E-mail: Applicant' (set to 'No'), and 'Additional users from Job' (set to 'No'). A table shows the application history:

Status	Date	Time	User
✓ New application	6 Sep 2016	12:44 pm	RICHARD PAGE
✓ Pre-offer check	7 Sep 2016	11:16 am	ERICA FINI-MARTEN

Below the table is a 'Note' section with a text area for adding notes. A red arrow points from the text 'click on 'Move now'' to the 'Move now' button at the bottom of the dialog. Other buttons include 'Cancel' and 'Spell check'.

- This will bring up the Offer card. 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.



For positions with multiple title levels, **you must choose one title**. Failure to do so will result in the highest level of title mapping to JEMS Hire and ultimately pushing to HRS.

You will also indicate background check and/or I-9 is requirements for the hire, choose the New starter form and Onboarding workflow. Confirm the correct Reports to manager and update the Onboarding coordinator.

Sarah Panda Parker (Sarah P Parker)

Personal details

Address: 21 N Park St
Madison, Wisconsin
53715, United States Phone: 5555555555

E-mail: finimarten@wisc.edu

Applicant number: 1214

[View profile](#)

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](#)

Positions:

Position no	Type	Applicant	Application status
TRAIN72784-AS	New	Train1Christine Train1	JEMS new identification form paperwork complete
TRAIN72784-AS	New	Lauren Butters	Verbal offer
TRAIN72784-AS	New	Brian IsSoAwesomeltIsContageous	JEMS new identification form paperwork complete
<input checked="" type="radio"/> TRAIN72784-AS	New	-	-
<input type="radio"/> TRAIN72784-AS	New	-	-

POSITION DETAILS

Delete title(s) that do not apply. Leave the selected title and title code. Example: ADMIN PROGRAM SPEC (R07DB)

Selected title and title code: **A** Delete all titles that do not apply.

Start date:* **B**

End date if applicable: must match PVL: **C**

Empl class: Academic Staff-Renewable

FTE:* **D** Confirm or update to show a whole number. Do not use decimals.

Hours per week: **E**

SALARY

Annual/Academic Salary: **F**

Hourly Pay rate (if not Annual/Academic Salary): **G**

Pay Basis: Annual

Probation period type: **H**

Use Probationary Period for US or FTF | Evaluation Period for Academic Staff | CHS for CHS Professor Series | or Not Required

Probation length: **I**

Please indicate the length of the probation: 6 month - 12 month - 18 month or 24 month

Salary notes:

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. Example: 100% should be entered as 100, not 1.0
E.	If University Staff - enter hours per week
F.	If exempt - enter annual salary
G.	If hourly enter - hourly rate
H.	Enter probation type. Do not enter a probation for TE, LI, and FA employment classes.
I.	Enter probation length if probation required

PRE-EMPLOYMENT CHECKS

Is a criminal background check required? Yes No **J**

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

Is an I 9 required? Yes No **K**

J.	Indicate if a criminal background check is required
K.	Indicate if an I-9 is required

ONBOARDING

New starter form:* **L**





Onboarding workflow:* **M**

Reports to manager:* **N**

Onboarding Coordinator: **O**

Will show the name that was entered on the job card. Update if needed.

Will show the Reports to manager name. Update to reflect correct Onboarding coordinator name.

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  Search icon to search for name if necessary.)
O.	Onboarding Coordinator will automatically populate with Reports to Manager name. Update to reflect the name of the onboarding coordinator in the unit. Click on  Erase icon and enter name of the Onboarding Coordinator. Use  Search icon to search for name if necessary.

6. These fields are system generated fields and default to “No.” Do not edit these fields.

The following fields will be automatically updated by the system

Offer accepted: Yes No

Date offer accepted:

Offer declined: Yes No

Date offer declined:

7. Near the bottom of the page you will add all documents associated with the offer. Documents include the offer letter and offer letter attachment, as well as any other necessary documents such as a copy of the position description or ASPP. 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.

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.

Offer documents

Documents attached to the offer appear in the section below.

Add document Merge document ?

Document	Date	Size	Category
Document library:			
Name	Date	Size	
Offer Letters (14)			
Offer Letter Attachments (2)			

Message from webpage

To perform this action the offer card must first be saved.
Do you want to save the offer now?

OK Cancel

8. 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 must include the 'Offer Letter Attachment' in order to provide the selected candidate with additional required information. The "Offer Letter Attachment" in the Offer Card document library is the most up to date document.**

Document merge

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)

Select documents to merge:

Documents

Document	Date	Size	View
<input type="checkbox"/> Academic Staff Fixed-Term Terminal Offer Letter.rtf	8 Jul 2016	44Kb	View
<input checked="" type="checkbox"/> Academic Staff Renewable Offer Letter.rtf	8 Jul 2016	39Kb	View
<input type="checkbox"/> Faculty Tenured Offer Letter.rtf	11 Jul 2016	50Kb	View
<input type="checkbox"/> Faculty Probationary Offer Letter.rtf	11 Jul 2016	43Kb	View
<input type="checkbox"/> Limited Appointment for Current Academic Staff Employee Offer Letter.rtf	8 Jul 2016	40Kb	View
<input type="checkbox"/> Limited Appointment for Current Exempt University Staff Employee Offer Letter.rtf	8 Jul 2016	40Kb	View
<input type="checkbox"/> Limited Appointment for Current Non Exempt University Staff Employee Offer Letter.rtf	8 Jul 2016	39Kb	View
<input type="checkbox"/> Limited Appointment New to UW With Faculty Backup Offer Letter.rtf	11 Jul 2016	42Kb	View
<input type="checkbox"/> Limited Appointment Not New to UW with Concurrent Faculty Appointment Offer Letter.rtf	11 Jul 2016	39Kb	View
<input type="checkbox"/> Limited Appointment New to UW Without Concurrent Faculty Appointment Offer Letter.rtf	22 Aug 2016	40Kb	View
<input type="checkbox"/> Rehired Annuitant Offer Letter.rtf	11 Jul 2016	42Kb	View
<input type="checkbox"/> Temporary Employee Offer Letter .rtf	11 Jul 2016	39Kb	View
<input type="checkbox"/> University Staff Ongoing Offer Letter .rtf	8 Jul 2016	40Kb	View
<input type="checkbox"/> University Staff Fixed Term Finite Offer Letter.rtf	11 Jul 2016	42Kb	View

Offer Letter Attachments

<input type="checkbox"/> Academic Staff Policies and Procedures (ASPP).pdf	19 May 2016	431Kb	View
<input checked="" type="checkbox"/> AttachmenttoOffer orAppointmentLetter.doc	19 May 2016	45Kb	View

Merge Cancel

9. You will return to the offer card. Click on View for the offer letter in the Offer document area.

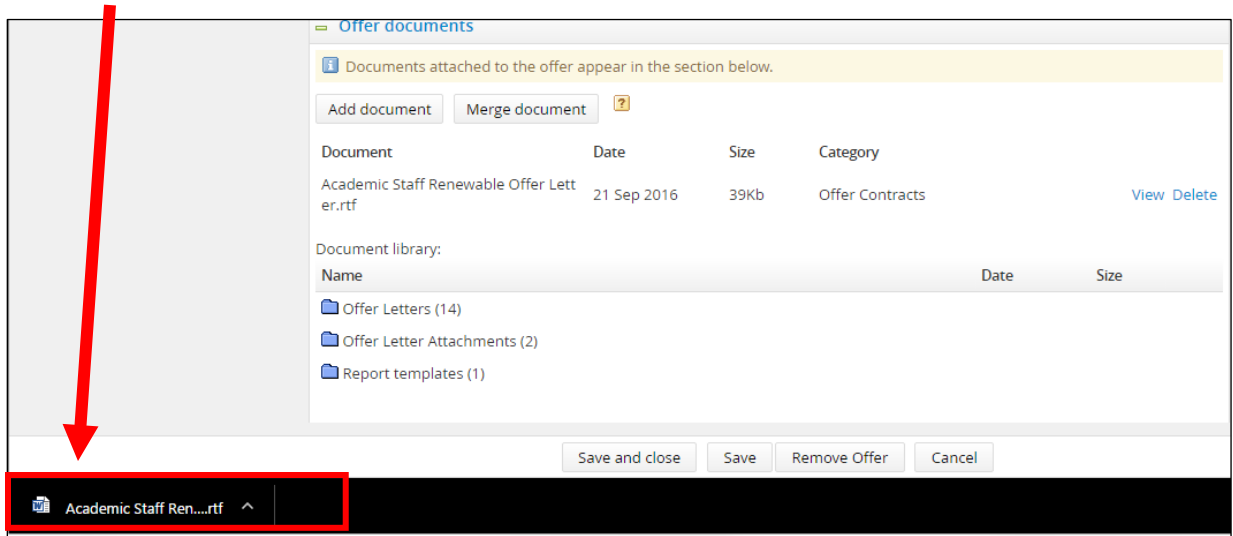
Offer documents

Documents attached to the offer appear in the section below.

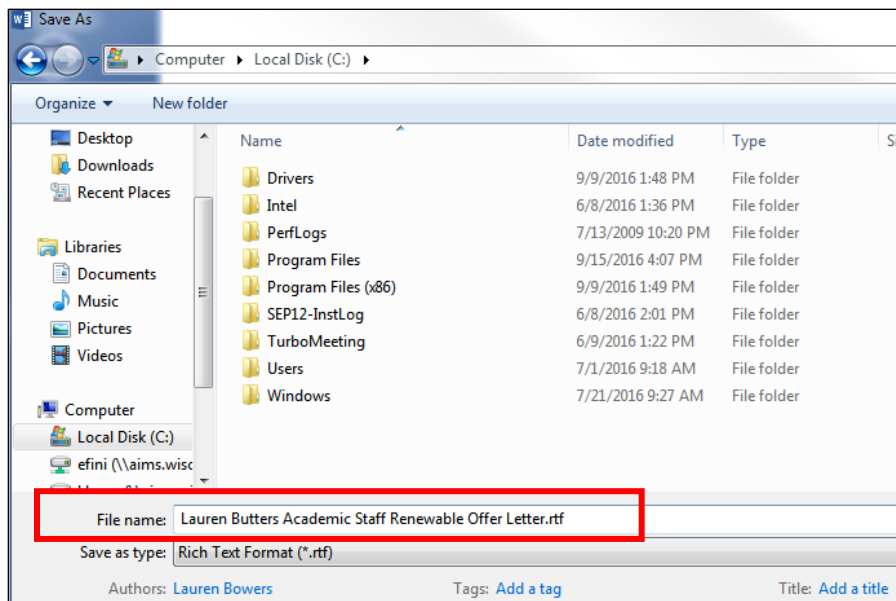
Add document Merge document ?

Document	Date	Size	Category	View	Delete
Academic Staff Renewable Offer Letter.rtf	21 Sep 2016	39Kb	Offer Contracts	View	Delete

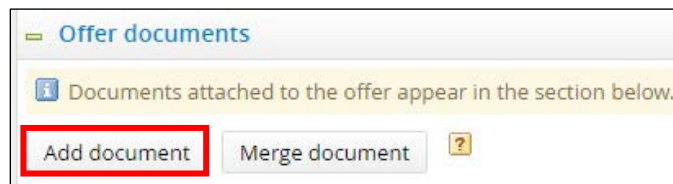
10. This will automatically download the merged letter into MS Word format. Click on the Offer/Appointment letter at the bottom of your screen.



11. Make necessary edits to the Offer/Appointment letter, which must include putting on letterhead and signing. Once complete, save the document to your computer.



12. 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.



13. 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 – do not change the document category. **Only documents in the category of 'Offer Contracts' are viewable by the selected candidate within their applicant account.** Enter a title for the document in the 'Title' field. Once you have selected and titled 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

File:* Upload file Dropbox

Document category:* Offer Contracts

Title:

Save and add another Save and close Close

14. View your uploaded Offer/Appointment letter to ensure it is correct (it may take a few minutes to load).

Offer documents

Documents attached to the offer appear in the section below.

Add document Merge document ?

Document	Date	Size	Category	
Lauren Butters Academic Staff Renewable Offer Letter.rtf	21 Sep 2016	40Kb	Offer Contracts	View Delete
Academic Staff Renewable Offer Letter.rtf	21 Sep 2016	39Kb	Offer Contracts	View Delete

15. **Delete the original Merge document.**

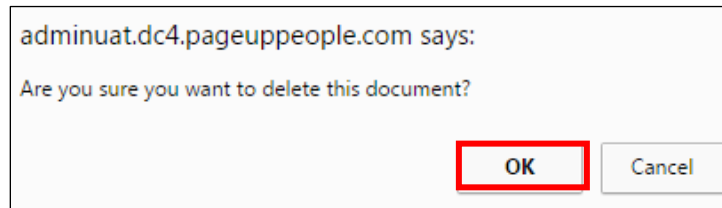
Offer documents

Documents attached to the offer appear in the section below.

Add document Merge document ?

Document	Date	Size	Category	
Lauren Butters Academic Staff Renewable Offer Letter.rtf	21 Sep 2016	40Kb	Offer Contracts	View Delete
Academic Staff Renewable Offer Letter.rtf	21 Sep 2016	39Kb	Offer Contracts	View Delete

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

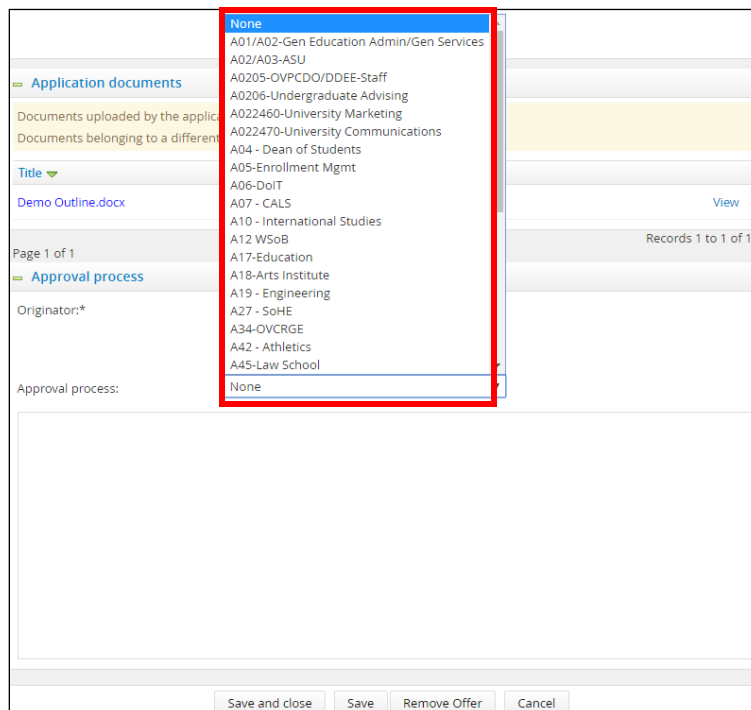


17. You will also view a list of application documents for the applicant.

The screenshot shows a section titled "Application documents" with a yellow background. Below the title, there is a note: "Documents uploaded by the applicant are displayed in blue. Documents belonging to a different application are marked with an asterisk (*)." Below this is a table with columns for Title, Size, and Category. The table lists several documents, with some titles in blue and others in black. A "View" link is present at the end of each row.



Title	Size	Category	
Academic Staff Policies and Procedures (ASPP).pdf	431Kb	Offer Contracts	View
Academic Staff Renewable Offer Letter.rtf	43Kb	Offer Contracts	View
Attachment to Offer Letter.doc	45Kb	Offer Contracts	View
Demo Outline.docx	13Kb	Cover letter	View
SJ Parker Appointment Letter	189Kb	Offer Contracts	View


18. Once you have completed the Offer Card, choose your division's approval process from the dropdown list.







19. 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.

Approval process

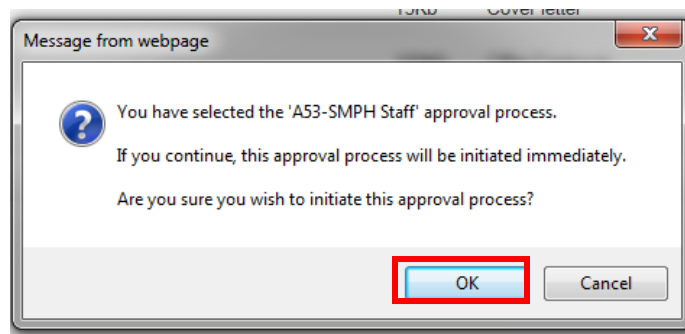
Originator:*  

Approval process: 

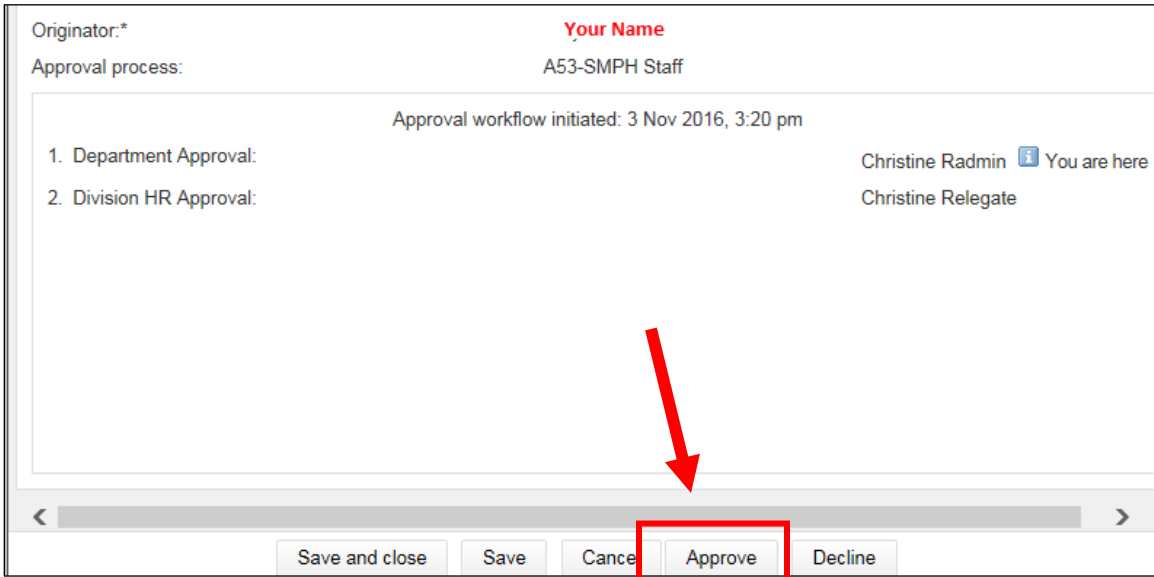
1. Department Approval:  
No user selected.

2. Division HR Approval:  
No user selected.

20. Once you click 'Save' you will receive this message, click 'Ok' if you have selected the correct approval process.



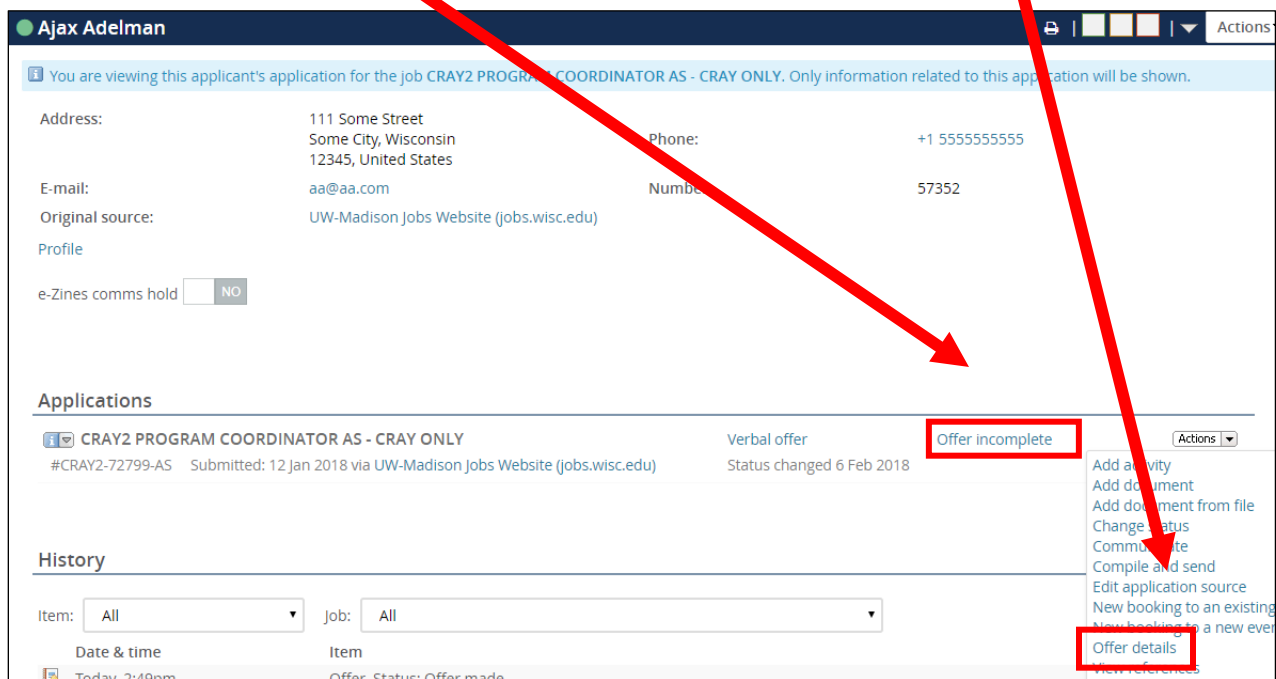
21. Once you click okay and you are the department approver the following screen will appear. Click the 'Approve' button (this will send an automatic communication to the Division Approver to approve or decline the offer). When this is complete, click on 'Save and close' to exit. If you are identified as the department and division approver, you must click approve for each approval level.



HOW TO: REOPEN THE OFFER CARD



There may be times you need to get back into the offer details and make changes after the offer card has been saved or approved. There are two methods to get back into the offer card: 1) open the applicant card and click on "Offer incomplete" or, 2) use the Actions menu to choose "Offer details". **DO NOT change the applicant's status back to 'Verbal offer' to reopen the offer.**



HOW TO: SEND THE OFFER



Once the offer card has been approved, conversations with the selected candidate are complete, negotiations are finalized and background check (if required) is complete, you are ready to send the offer to the candidate.

1. Open the applicant card and change the status to 'Online offer made' and click on 'Next'. **Do not move to 'Online offer made' until the Offer Card has been approved.**
2. This will bring up the template communication that will be emailed to the selected candidate. This template uses merge fields that automatically include the job title, number, your name and email address. You can also choose to include additional users from the Job. Once you have the communication set, click on 'Move now' to send the email to the applicant.

Change application status

- New
- Does not meet minimum qualifications
- Search committee review
- Phone screen
- Phone Screen Accepted
- Phone Screen Declined
- Interview
- Interview 1 accepted
- Interview 1 declined
- Interview 2
- Interview 2 accepted
- Interview 2 declined
- Reference check
- Verbal offer
- Background Check
- Online offer made**
- Offer declined
- JSMS new identification form paperwork complete
- Withdraw
- No longer considered
- Cancelled
- Submitted
- Incomplete
- Rescind Offer

Save Next >

E-mail: Applicant: Yes No

From:* uwjobs@wisc.edu

Subject:* UW-Madison Job Offer

Message: Merge fields

B I U [List icons] [Table icon] [Link icon] [Code icon] [Help icon]

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 (A534250-MEDICAL SCHOOL/MEDICINE/GASTROENT), TRAIN72784-AS 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 <http://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. **You must open each document in order to accept 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,
SUSAN BACULIK
SUSAN.BACULIK@WISC.EDU
University of Wisconsin-Madison

No SMS will be sent to the applicant as they do not wish to receive them.

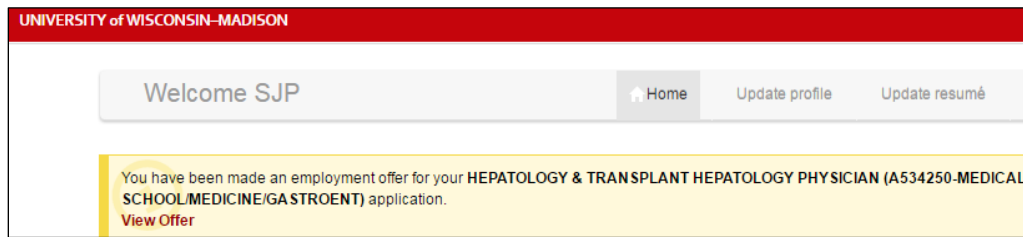
Additional users from Job: Yes No

Move now

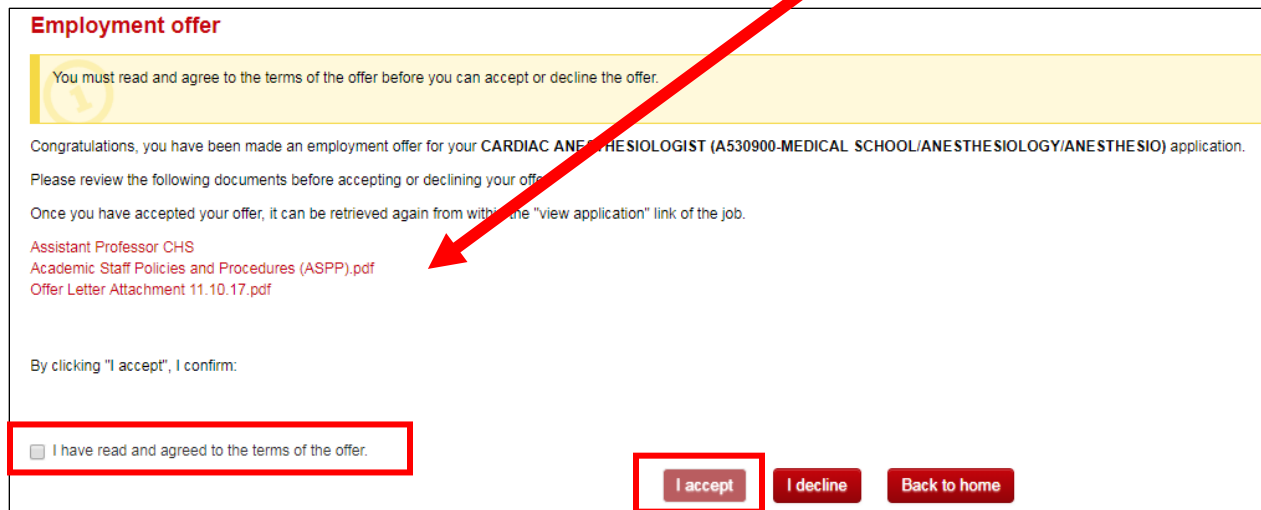
Cancel

Spell check

3. The selected candidate will log into his/her account to accept or decline the offer, as well as review all documents.



4. The selected candidate must open each document and click the box, "I have read and agreed to the terms of the offer" before the 'I accept' button will be available to select. If the candidate does not open each document, he or she will not be able to click on the 'I accept' button.



5. Once the offer is accepted or declined, you will receive an automated communication notifying you of the offer's status.



6. 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 CHRIS-HR/JEMS Hire. **Wait** until the new starter information is transferred into JEMS CHRIS-HR/JEMS Hire to finish making the hire.

