Creating and Sending the Offer

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.

2. Click on the ‘Actions’ drop down menu and choose Change status:
Creating and Sending the Offer

3. Select ‘Verbal offer’ and click ‘Next’.

4. Confirm this status and date and click on ‘Move now’ (you may add a note at this time if applicable).
Creating and Sending the Offer

5. 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.

![Offer card example](image-url)
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
Creating and Sending the Offer

### PRE-EMPLOYMENT CHECKS

Indicate if a criminal background check is required.

Indicate if an I-9 is required.

### ONBOARDING

- **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.

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.
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.

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

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

15. **Delete the original Merge document.**
Creating and Sending the Offer

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

![Image of the pop-up window with OK and Cancel buttons]

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

![Image of the application documents list]

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

![Image of the approval process 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.

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.**
Creating and Sending 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.
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.