Creating and Sending the Offer

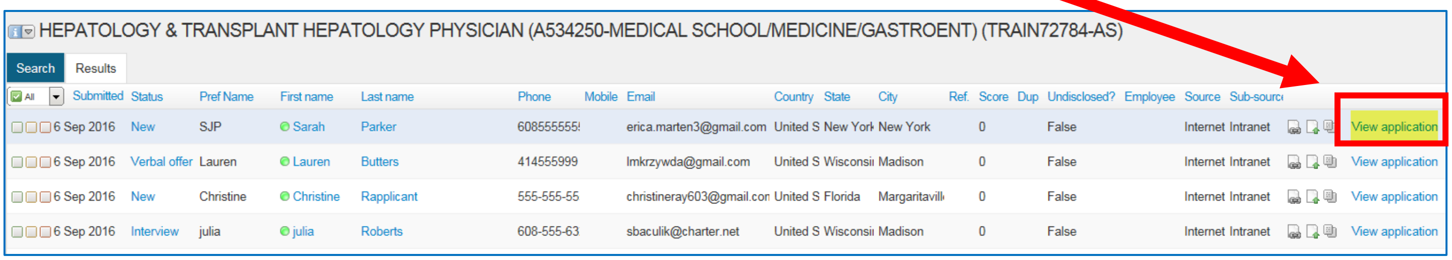
After you have spoken to the candidate and offered him/her the position, you are ready to start the offer process in TREMS. The offer process requires **two** applicant status changes: 1) a move to 'Verbal offer' and 2) a move to 'Online offer made'. You must move the selected candidate to 'Verbal offer'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

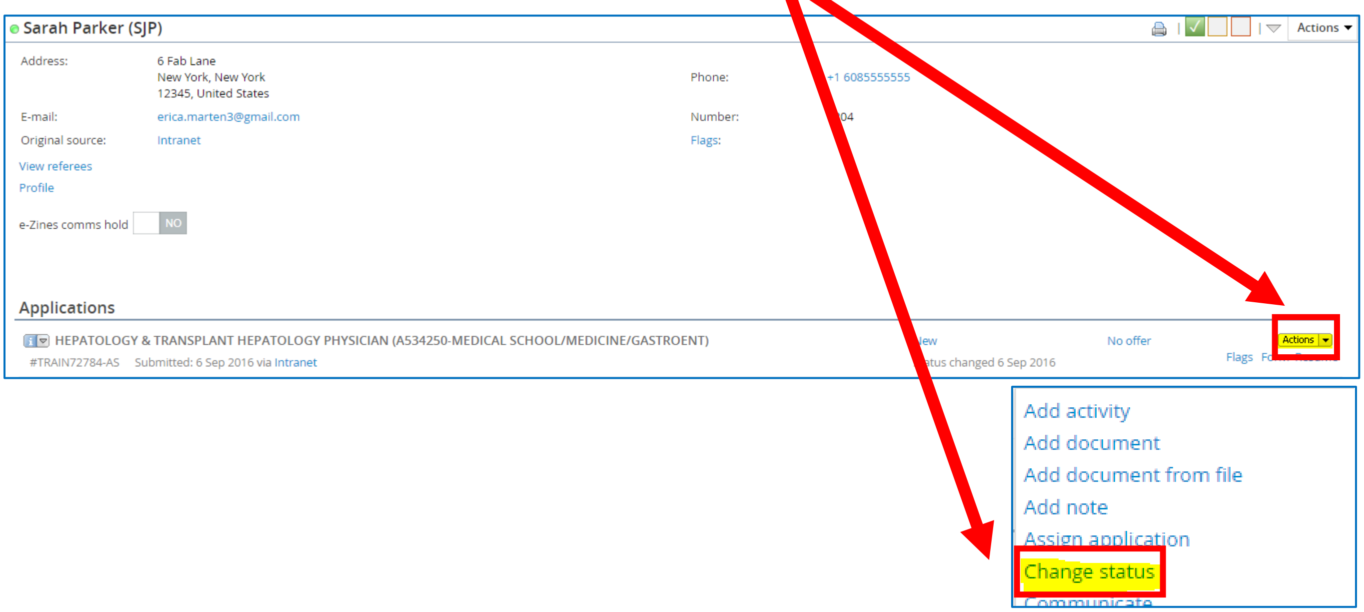
1. Click on 'view application' for the applicant who will receive offer.


HEPATOLOGY & TRANSPLANT HEPATOLOGY PHYSICIAN (A534250-MEDICAL SCHOOL/MEDICINE/GASTROENT) (TRAIN72784-AS)

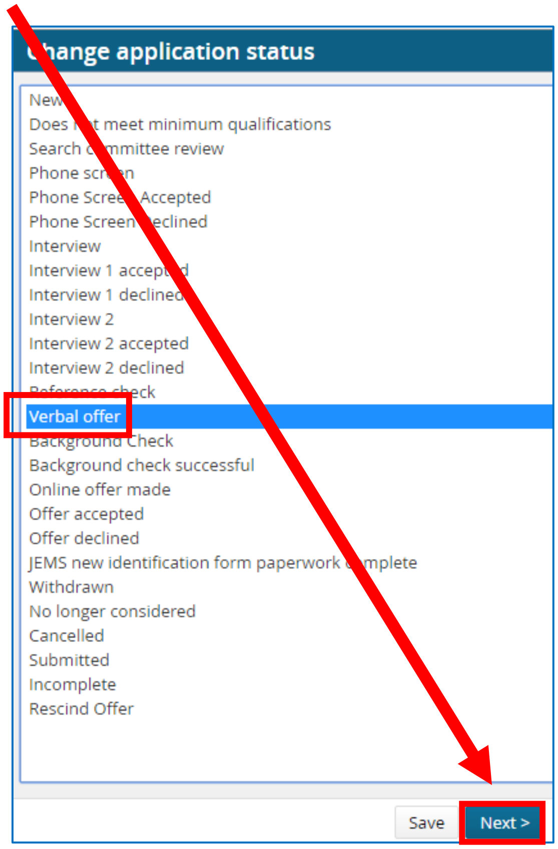
Search | Results

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	608555555!		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	Wisconsi	Madison		0		False		Internet	Intranet	View application
6 Sep 2016	New	Christine	Christine	Rapplicant	555-555-55		christineray603@gmail.con	United S	Florida	Margaritavill		0		False		Internet	Intranet	View application
6 Sep 2016	Interview	julia	julia	Roberts	608-555-63		sbaculik@charter.net	United S	Wisconsi	Madison		0		False		Internet	Intranet	View application

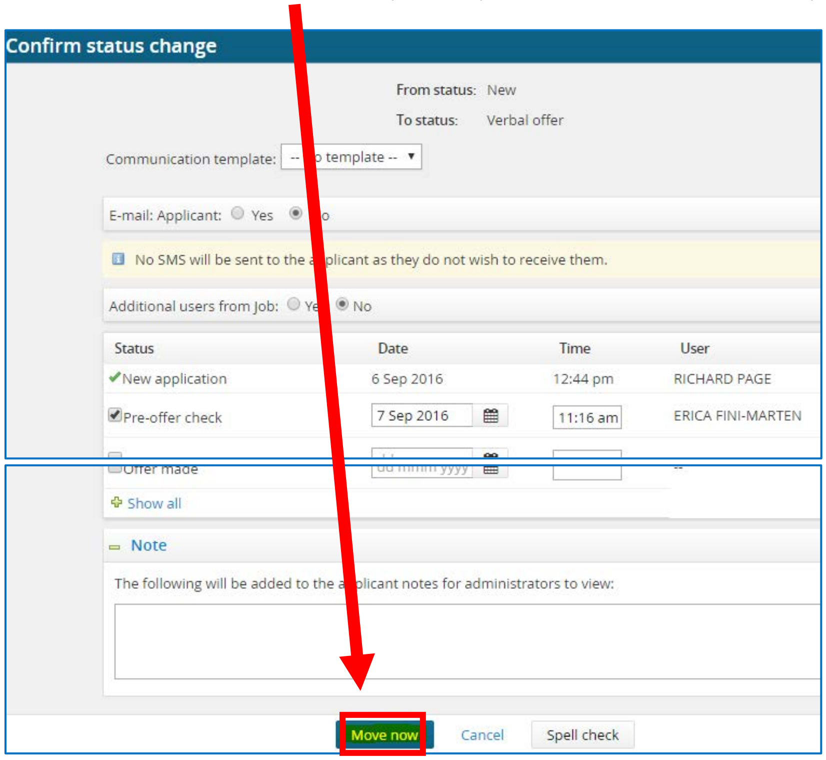
2. Click on the 'Actions' drop down menu and choose Change status:



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



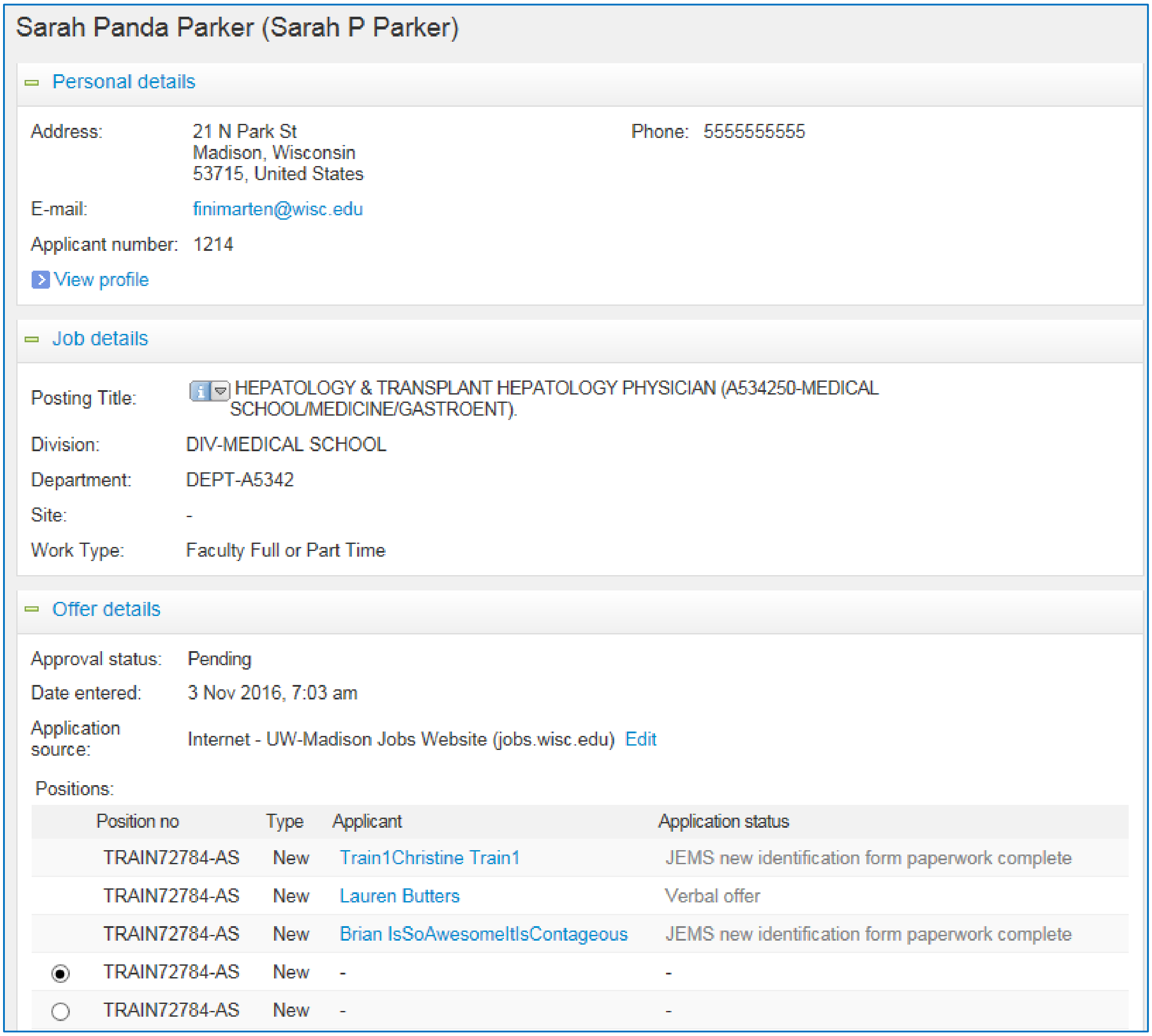
4. Confirm this status and date and click on ‘Move now’ (you may add a note at this time if applicable).



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.



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

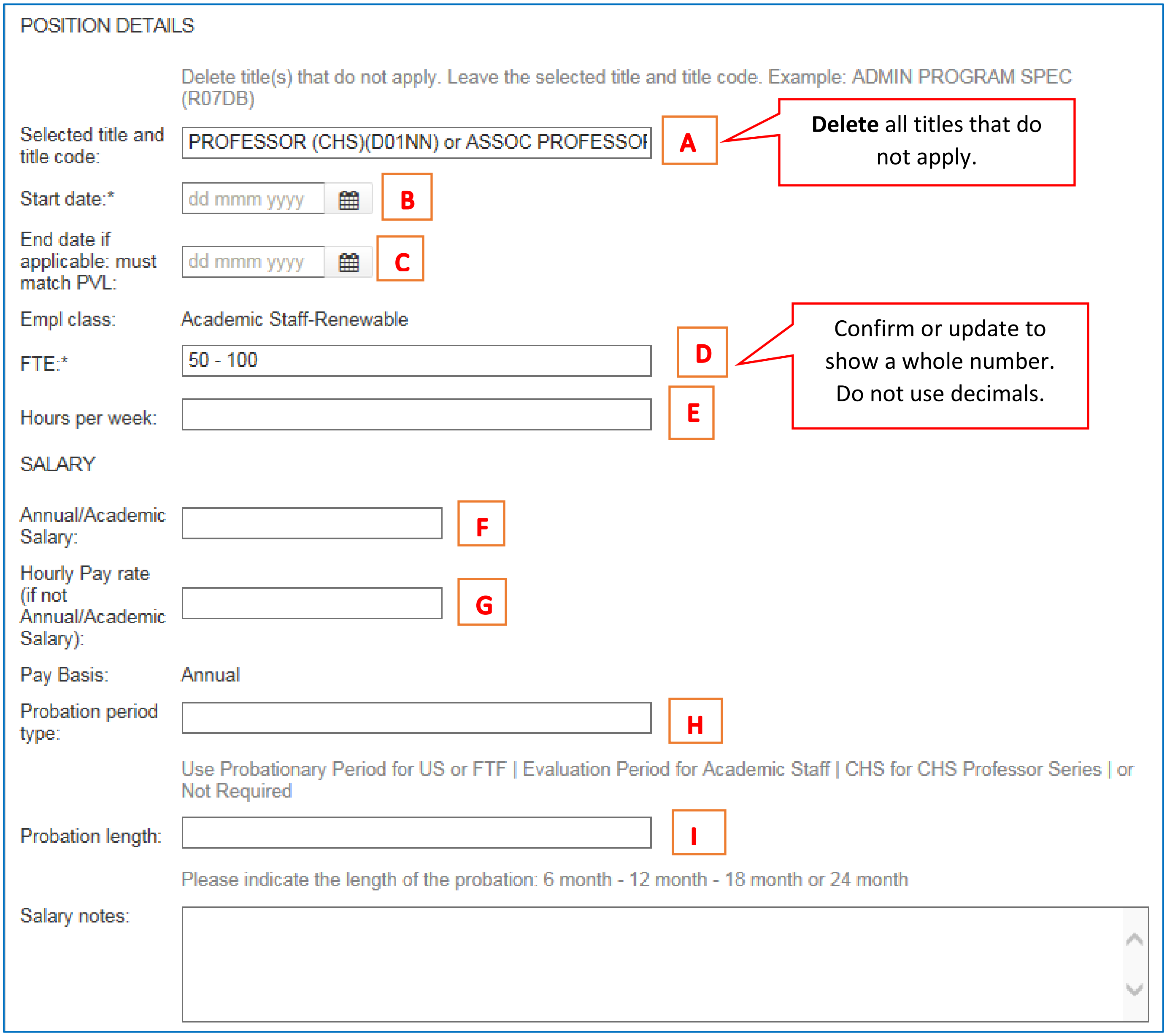
Approval status: Pending

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 IsSoAwesomeItIsContageous	JEMS new identification form paperwork complete
◉	TRAIN72784-AS	New	-	-
○	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: PROFESSOR (CHS)(D01NN) or ASSOC PROFESSOI — A

Delete all titles that do not apply.

Start date:* dd mmm yyyy — B

End date if applicable: must match PVL: dd mmm yyyy — C

Empl class: Academic Staff-Renewable

FTE:* 50 - 100 — 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

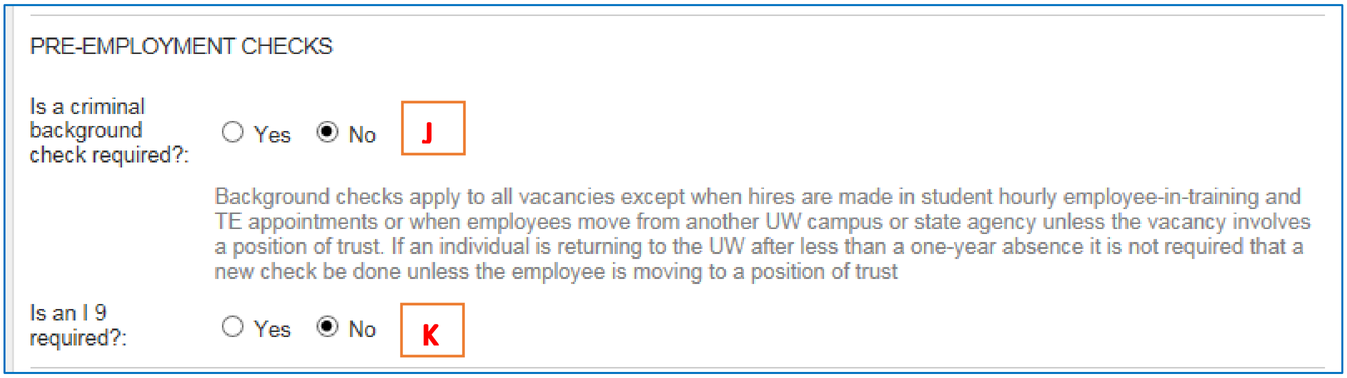
Use Probationary Period for US or FTF | Evaluation Period for Academic Staff | CHS for CHS Professor Series | or Not Required

Probation length: — I

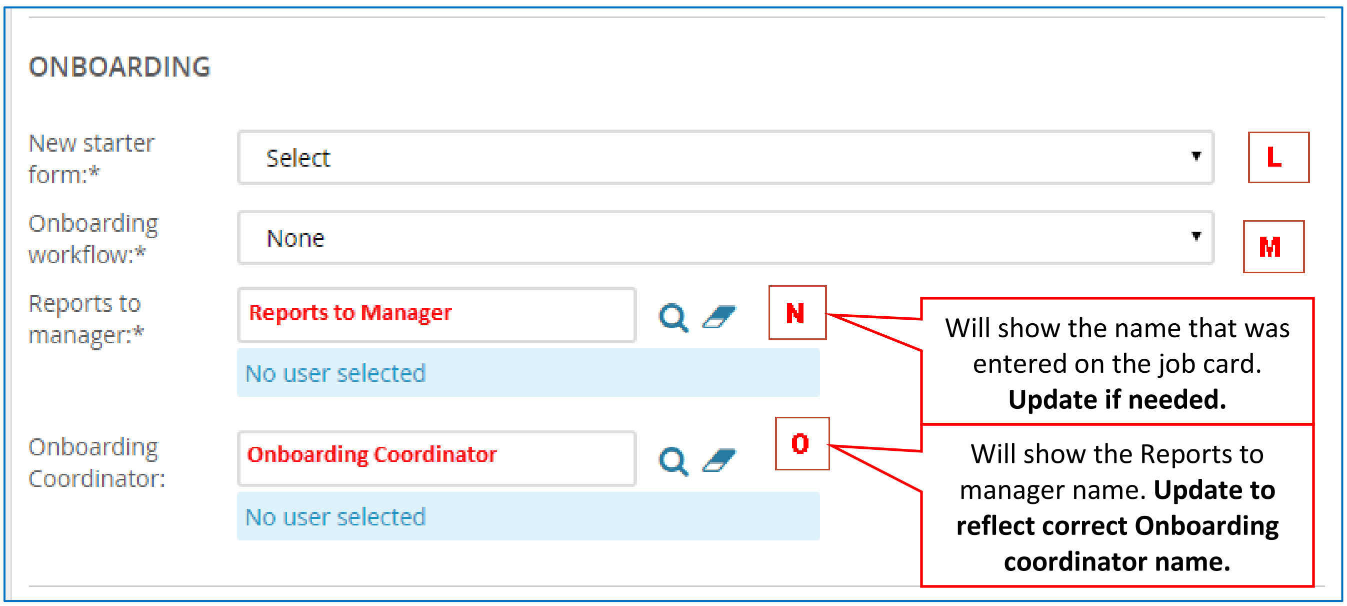
Please indicate the length of the probation: 6 month - 12 month - 18 month or 24 month

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

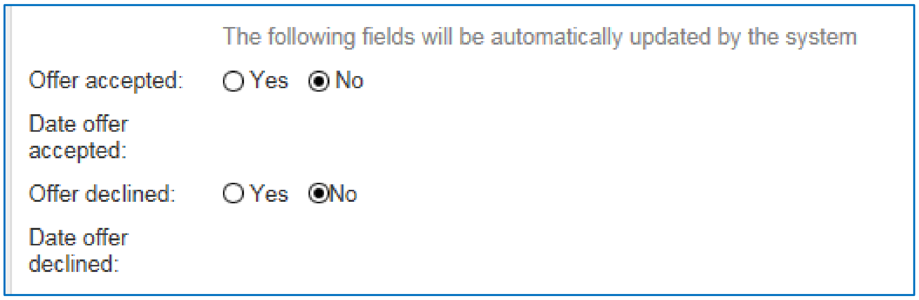


J.	Indicate if a criminal background check is required
K.	Indicate if an I-9 is required



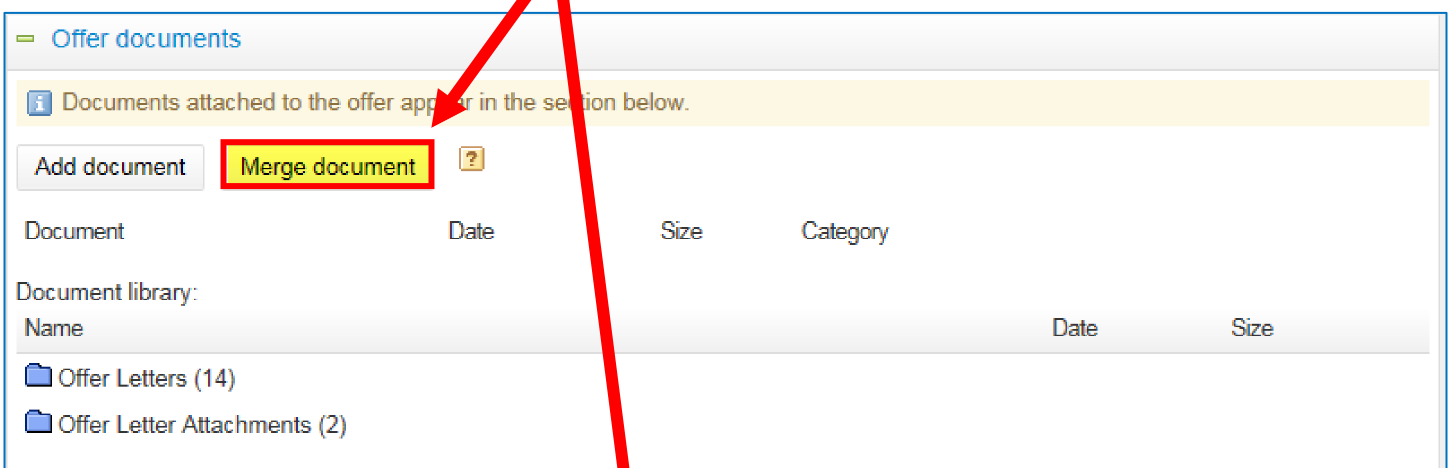
L.	Select New starter form from dropdown menu
M.	Select Onboarding workflow from dropdown menu
N.	Reports to Manager will automatically populate from Job Posting (If Reports to Manager has changed, click on Erase icon and enter name of Reports to Manager. Use Search icon to search for name if necessary.)
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.

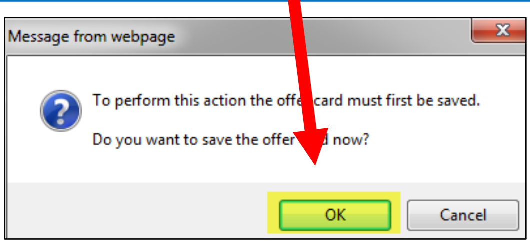
6. These fields are system generated fields and default to "No." Do not edit these fields.



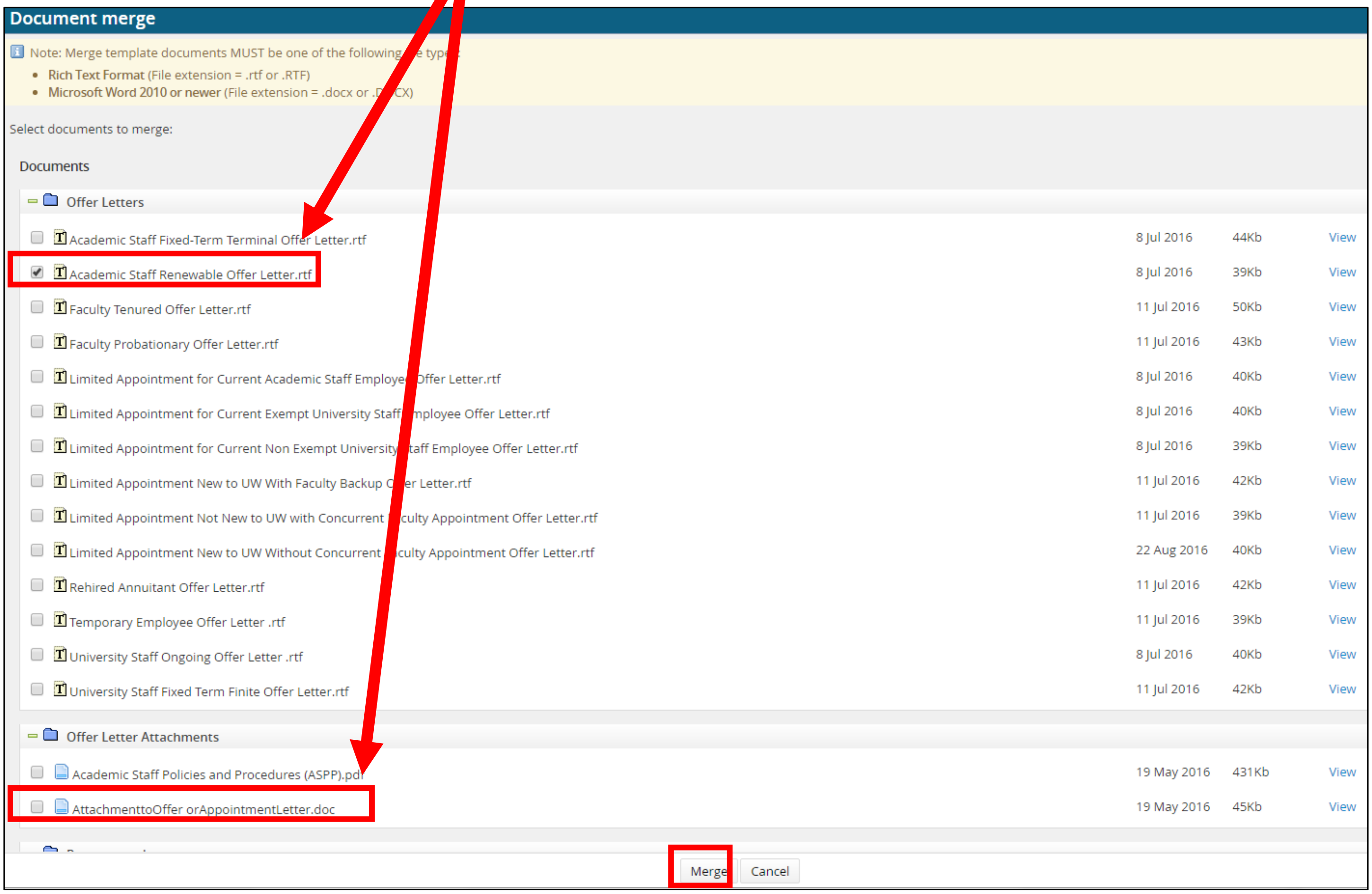
7. Near the bottom of the page you will add all documents associated with the offer. Documents include the offer letter and offer letter attachment, as well as any other necessary documents such as a copy of the position description or ASPP. There are pre-loaded templates for offer letters as well as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

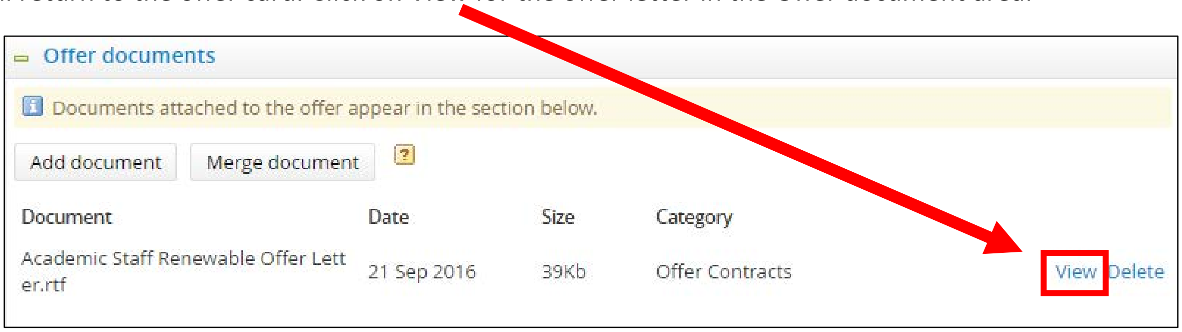




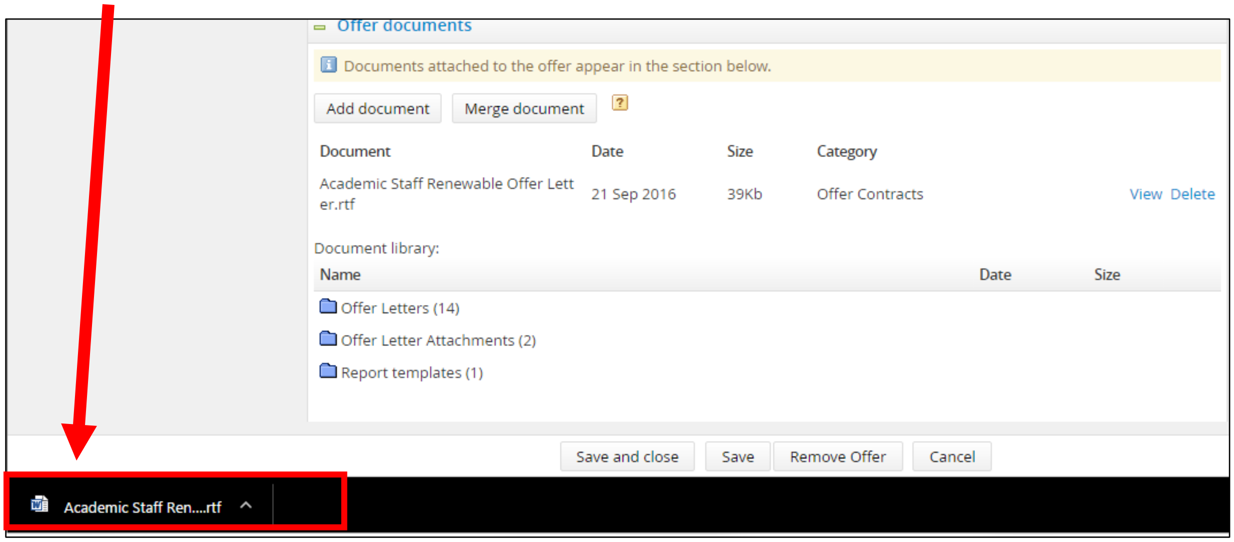
8. Select the offer letter that corresponds with your recruitment and the appropriate “Offer Letter Attachments” then click on Merge. **Note: You may elect to use your own appointment letter template versus merging from below list but you must include the ‘Offer Letter Attachment’ in order to provide the selected candidate with additional required information. The “Offer Letter Attachment’ in the Offer Card document library is the most up to date document.**



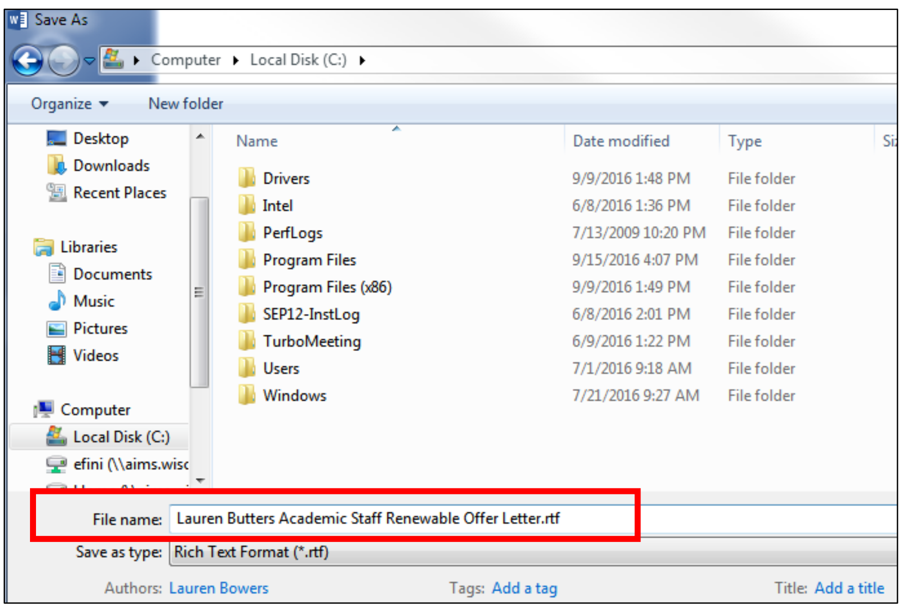
9. You will return to the offer card. Click on View for the offer letter in the Offer document area.



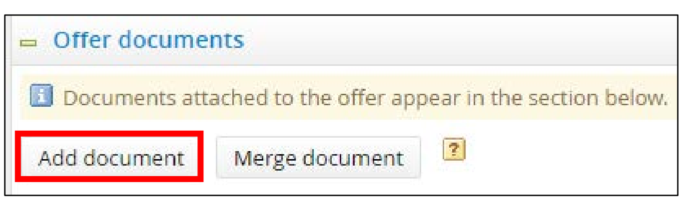
10. This will automatically download the merged letter into MS Word format. Click on the Offer/Appointment letter at the bottom of your screen.



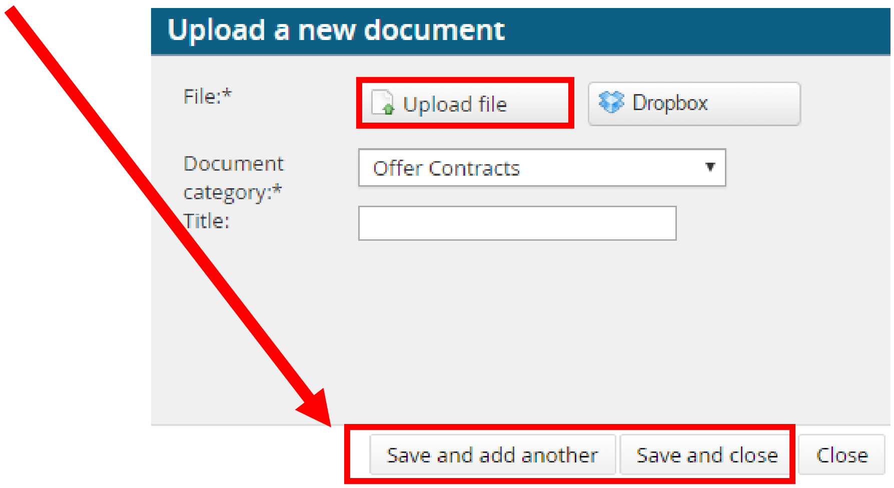
11. Make necessary edits to the Offer/Appointment letter, which must include putting on letterhead and signing. Once complete, save the document to your computer.



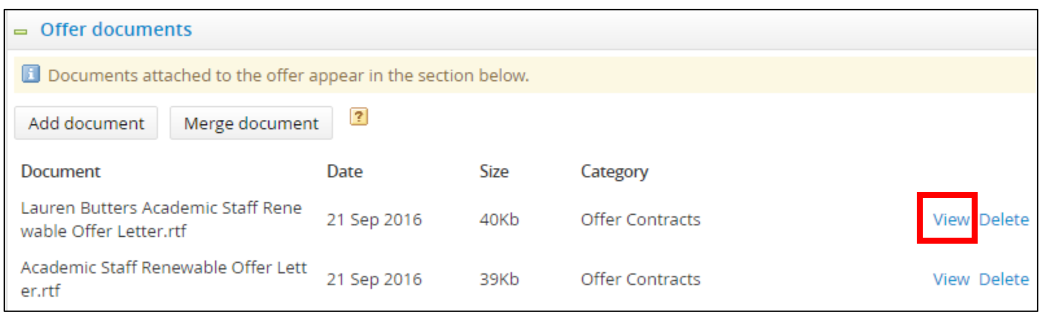
12. Go back to the Offer documents area. Click on Add document. You will also click here if you elect to use your own documents versus the merged documents.



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.

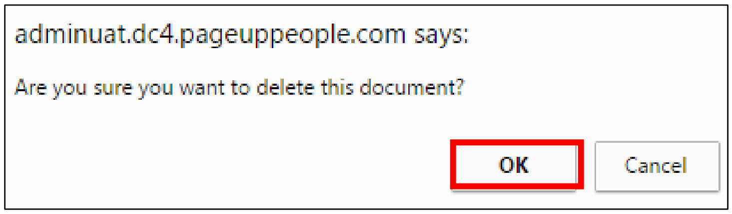


14. View your uploaded Offer/Appointment letter to ensure it is correct (it may take a few minutes to load).

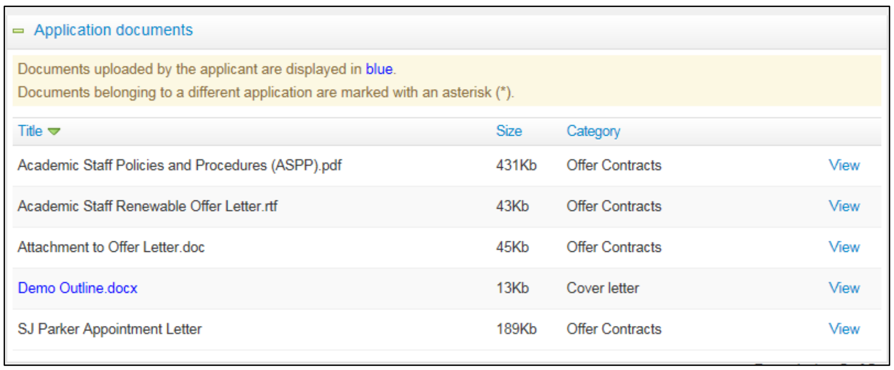


15. **Delete the original Merge document.**

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

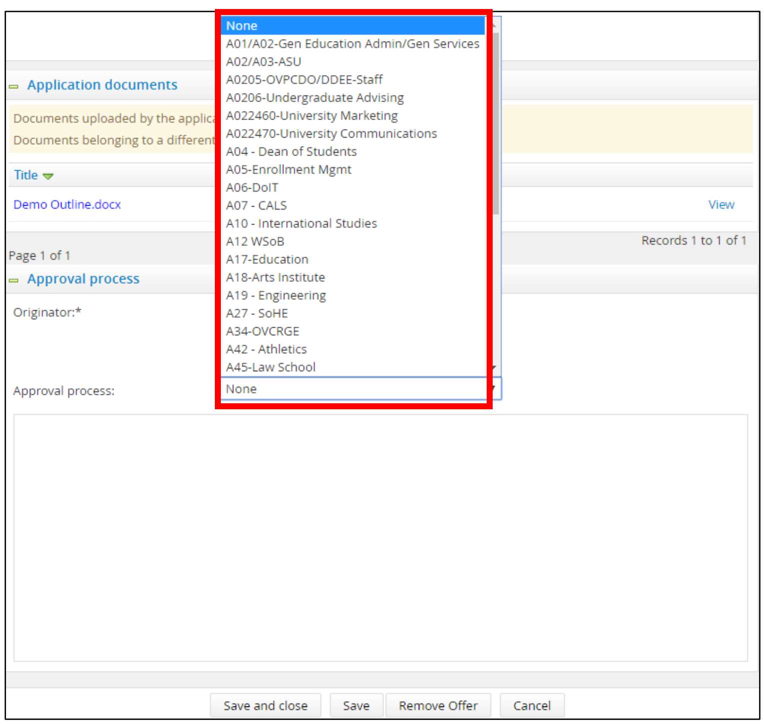


17. You will also view a list of application documents for the applicant.

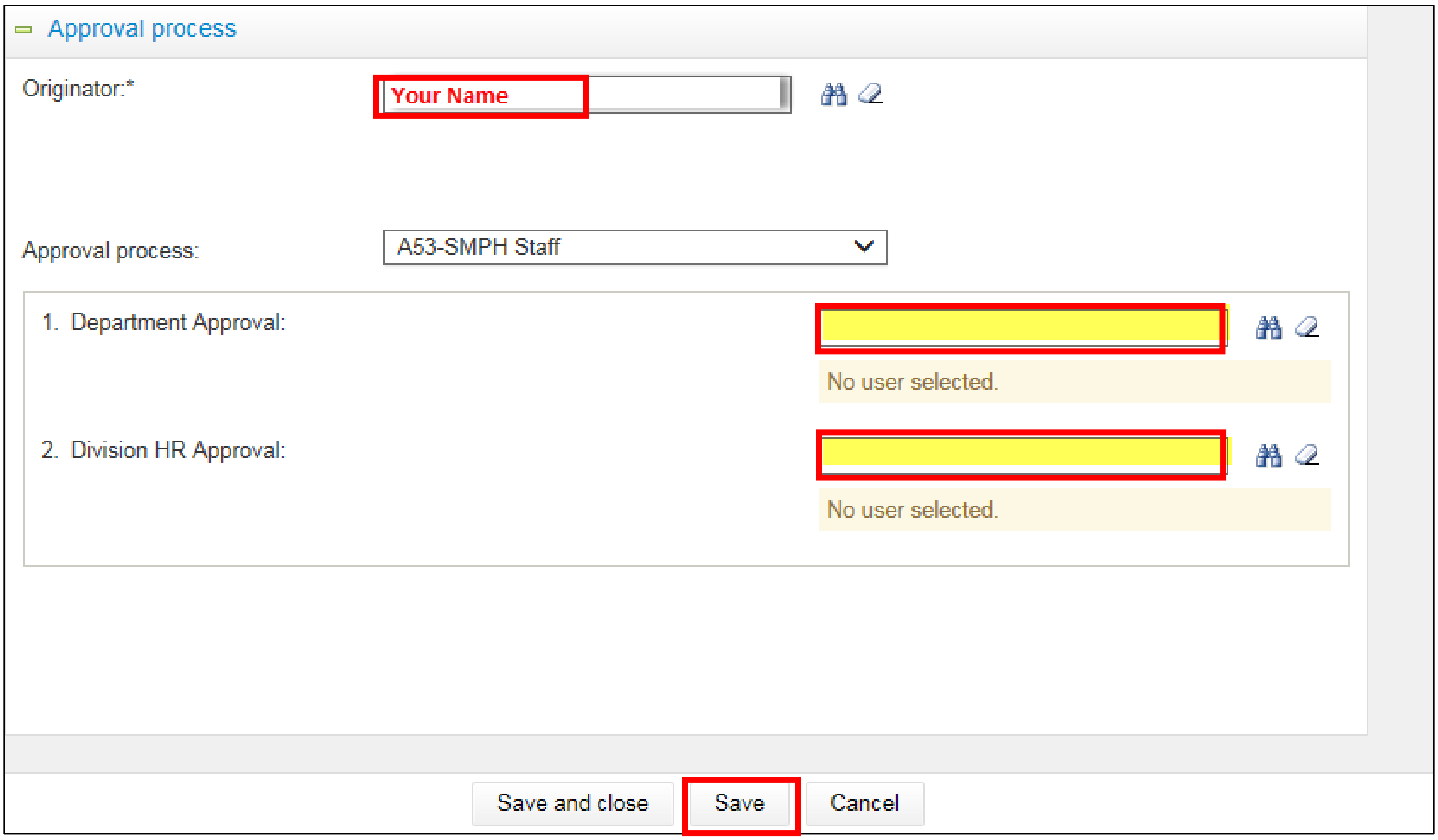


Title	Size	Category	
Academic Staff Policies and Procedures (ASPP).pdf	431Kb	Offer Contracts	View
Academic Staff Renewable Offer Letter.rtf	43Kb	Offer Contracts	View
Attachment to Offer Letter.doc	45Kb	Offer Contracts	View
Demo Outline.docx	13Kb	Cover letter	View
SJ Parker Appointment Letter	189Kb	Offer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

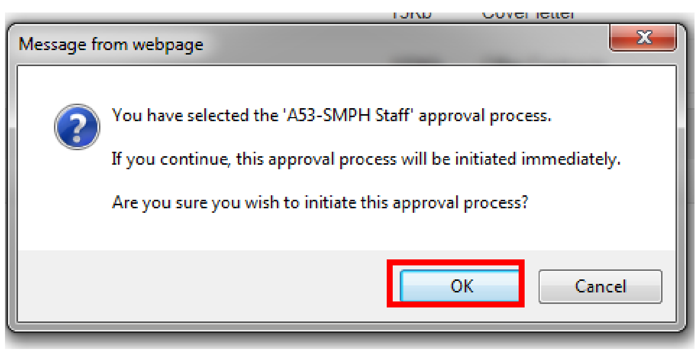
18. Once you have completed the Offer Card, choose your division's approval process from the dropdown list.



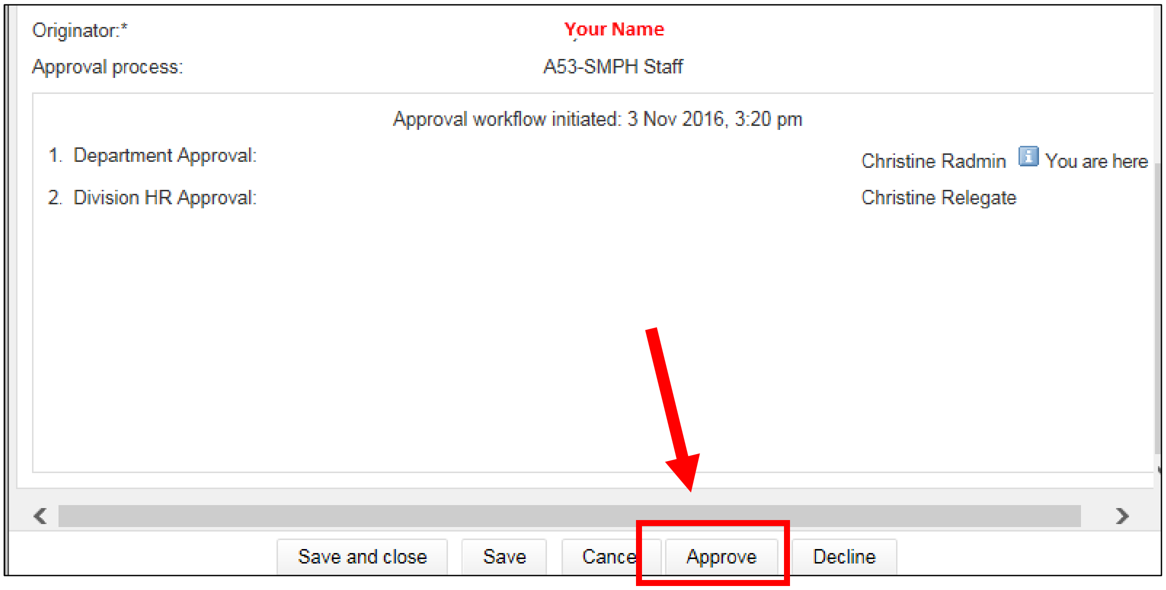
19. The approval process for your division will automatically populate. The 'Originator' field automatically populates with your name. Fill in the name(s) of the required approver(s) by clicking on the binoculars. If your approval process requires a department and division approver you will be required 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.



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

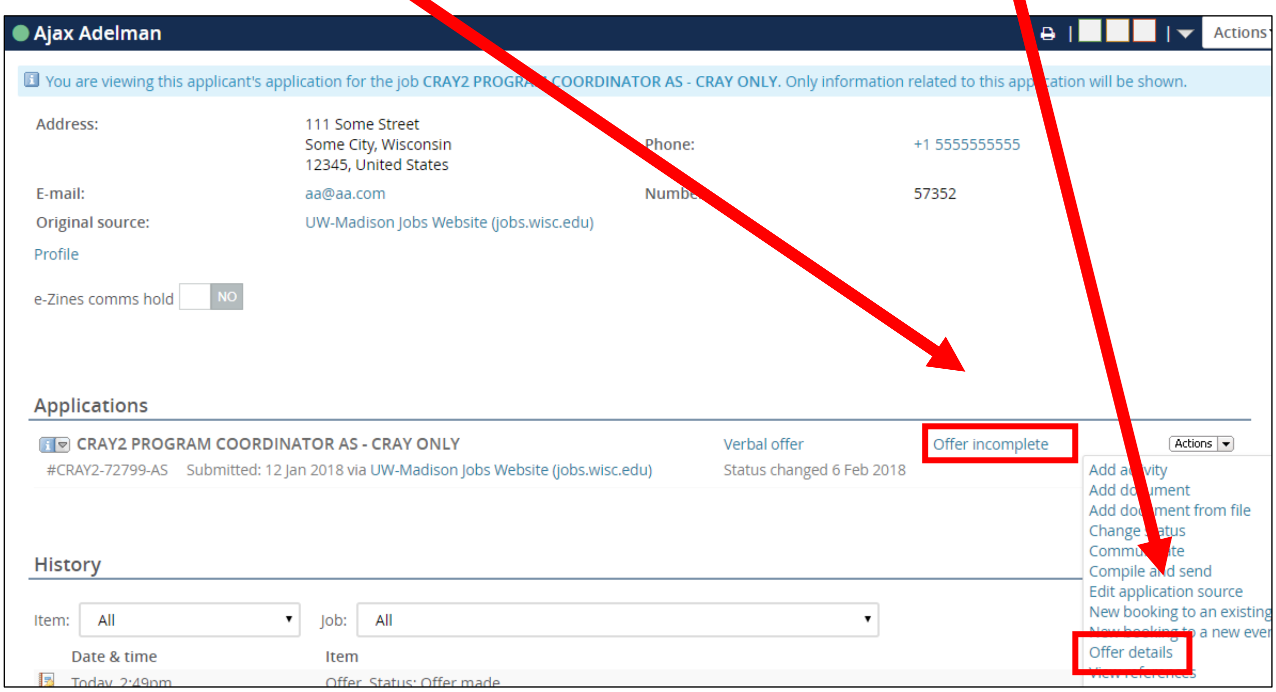


21. Once you click okay and you are the department approver the following screen will appear. Click the 'Approve' button (this will send an automatic communication to the Division Approver to approve or decline the offer). When this is complete, click on 'Save and close' to exit. If you are identified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



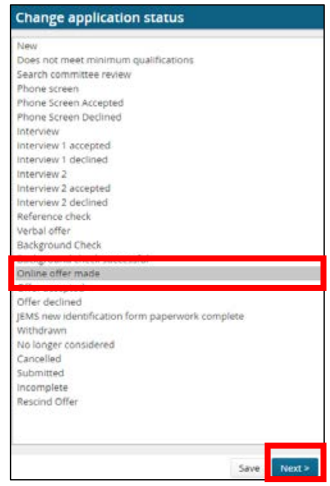
HOW TO: REOPEN THE OFFER CARD

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.

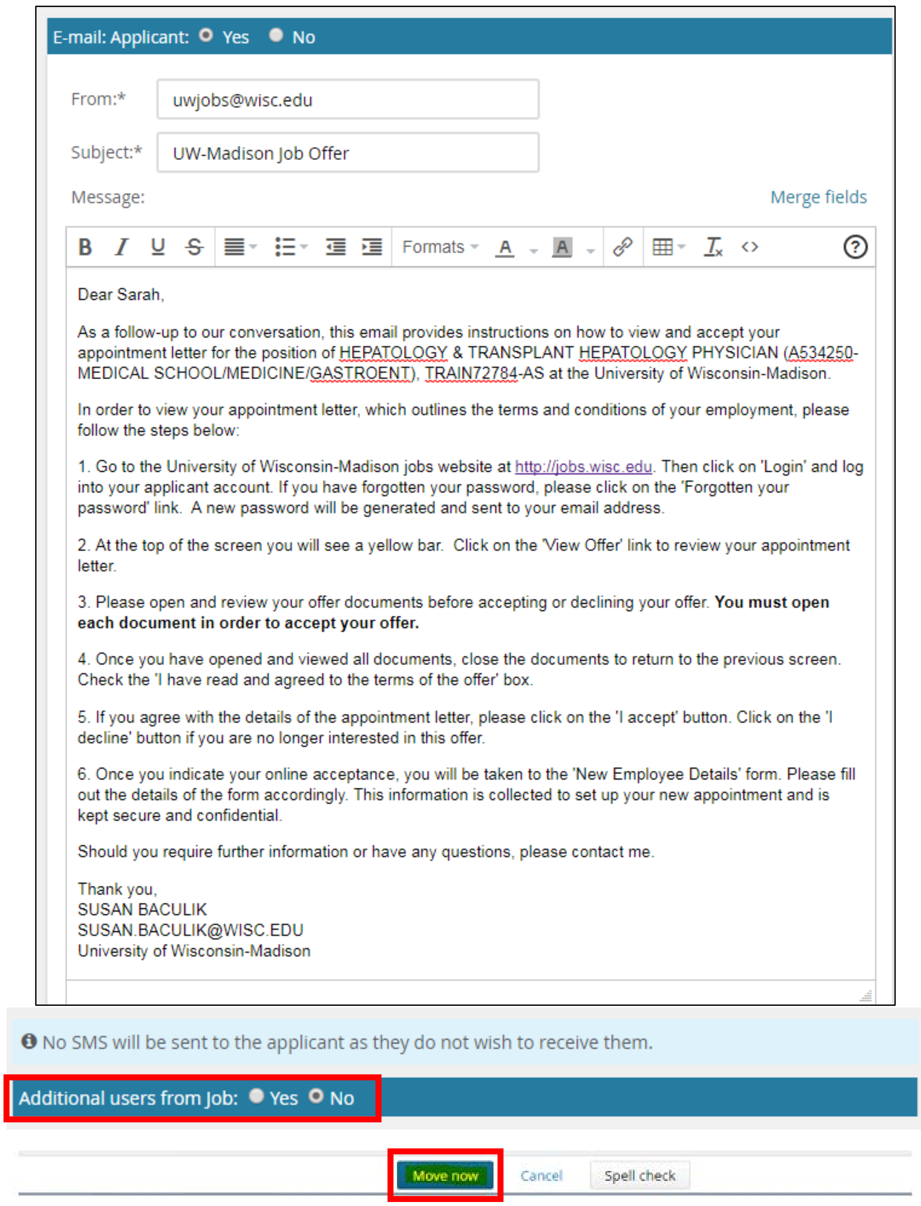

Change application status

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
JEMS new identification form paperwork complete
Withdrawn
No longer considered
Cancelled
Submitted
Incomplete
Rescind Offer

Save | Next >

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.


E-mail: Applicant: Yes No

From:* uwjobs@wisc.edu

Subject:* UW-Madison Job Offer

Message: Merge fields

Formats

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.

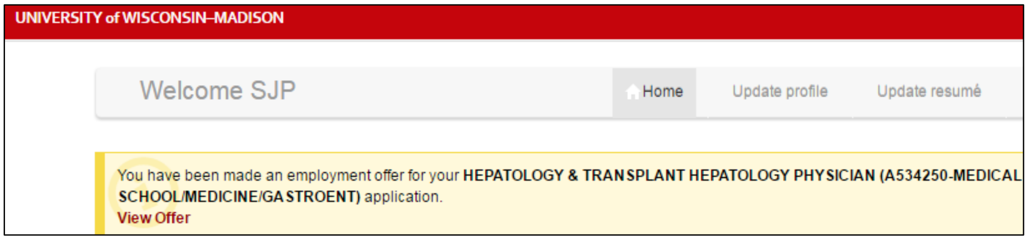
Thank you,
SUSAN BACULIK
SUSAN.BACULIK@WISC.EDU
University of Wisconsin-Madison

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

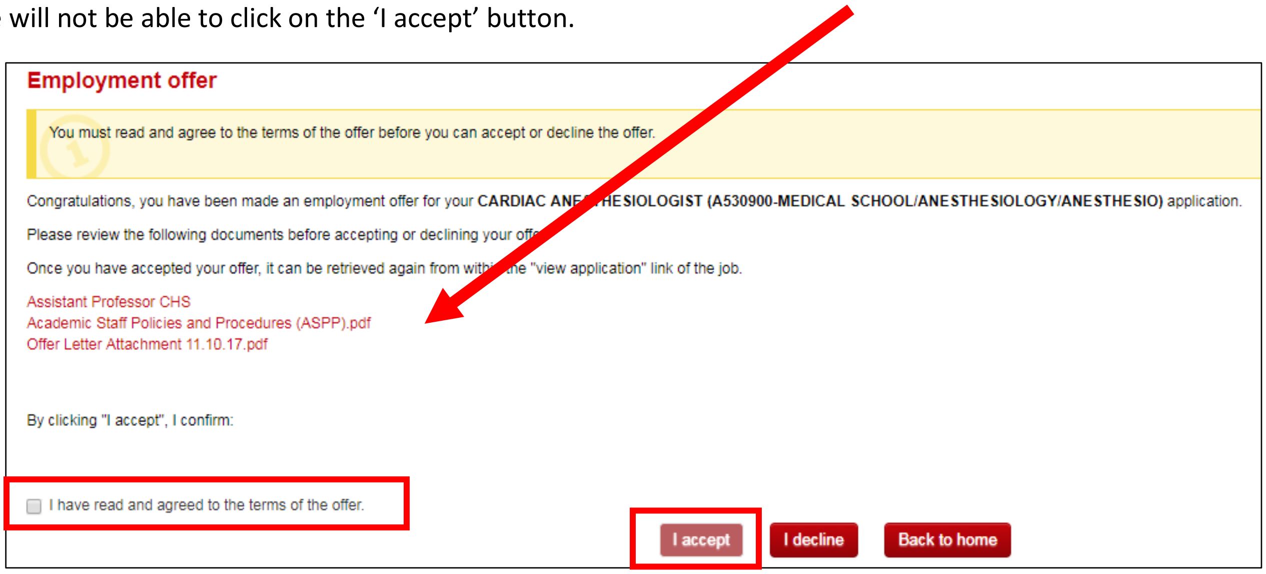
Additional users from Job: Yes No

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.