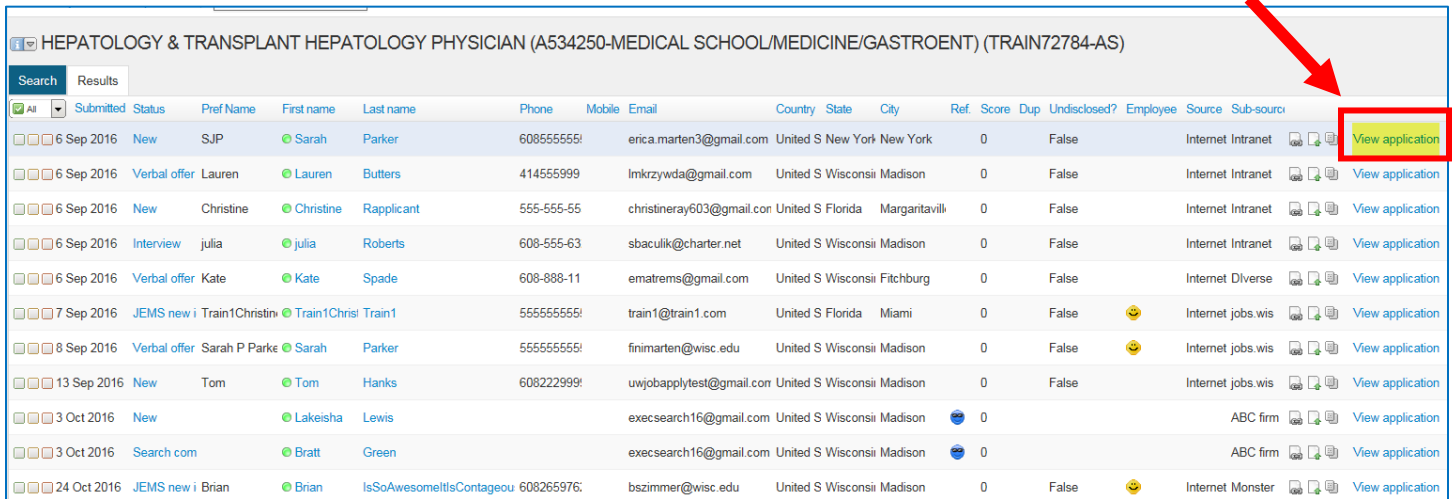


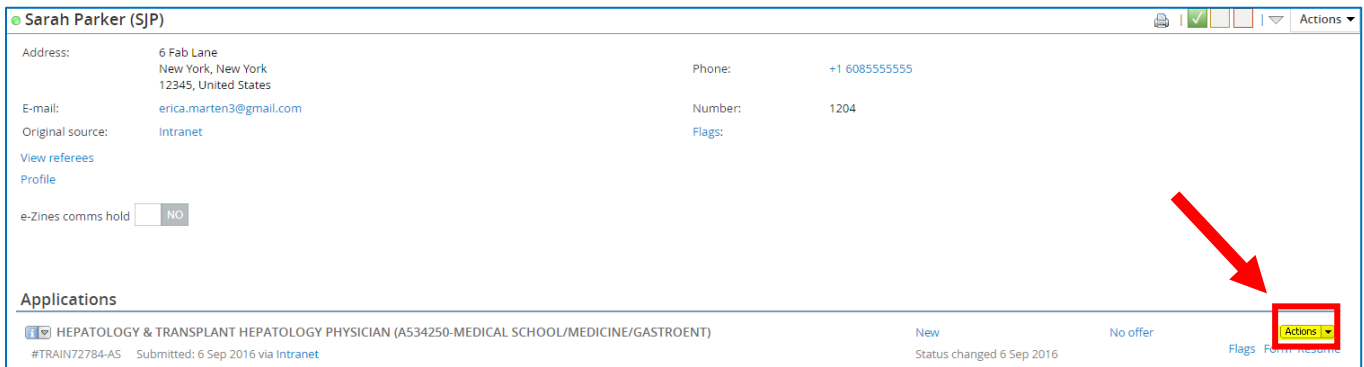
Creating the Offer Card

1. Click on 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-sourc		
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		lmkrzyd@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
6 Sep 2016	Verbal offer	Kate	Kate	Spade	608-888-11		ematrem@gmail.com	United S	Wisconsin	Fitchburg	0		False		Internet Diverse			View application
7 Sep 2016	JEMS new i	Train1Christin	Train1Chrisl	Train1	5555555555		train1@train1.com	United S	Florida	Miami	0		False	☹	Internet jobs.wis			View application
8 Sep 2016	Verbal offer	Sarah P Parke	Sarah	Parker	5555555555		finimarten@wisc.edu	United S	Wisconsin	Madison	0		False	☹	Internet jobs.wis			View application
13 Sep 2016	New	Tom	Tom	Hanks	608222999		uwjobapplytest@gmail.com	United S	Wisconsin	Madison	0		False		Internet jobs.wis			View application
3 Oct 2016	New		Lakeisha	Lewis			execsearch16@gmail.com	United S	Wisconsin	Madison	0		False	☹	ABC firm			View application
3 Oct 2016	Search com		Bratt	Green			execsearch16@gmail.com	United S	Wisconsin	Madison	0		False	☹	ABC firm			View application
24 Oct 2016	JEMS new i	Brian	Brian	IsSoAwesomelltsContageou	608265976		bszimmer@wisc.edu	United S	Wisconsin	Madison	0		False	☹	Internet Monster			View application

2. Click on the 'Actions' drop down menu:



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: 1204

Flags:

View referees

Profile

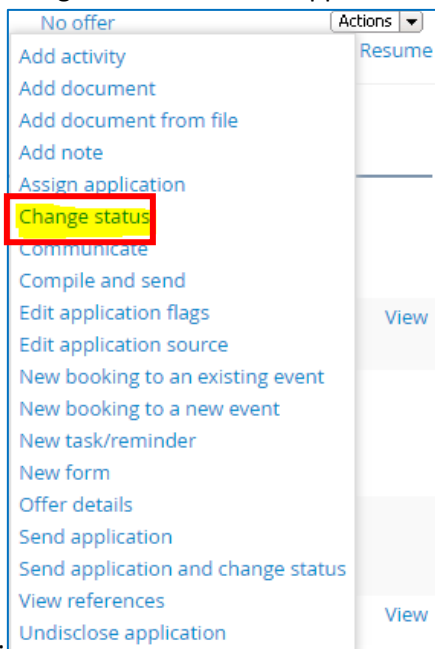
e-Zines comms hold NO

Applications

HEPATOLOGY & TRANSPLANT HEPATOLOGY PHYSICIAN (A534250-MEDICAL SCHOOL/MEDICINE/GASTROENT) (TRAIN72784-AS) New No offer Flags Form Resume

#TRAIN72784-AS Submitted: 6 Sep 2016 via Intranet Status changed 6 Sep 2016

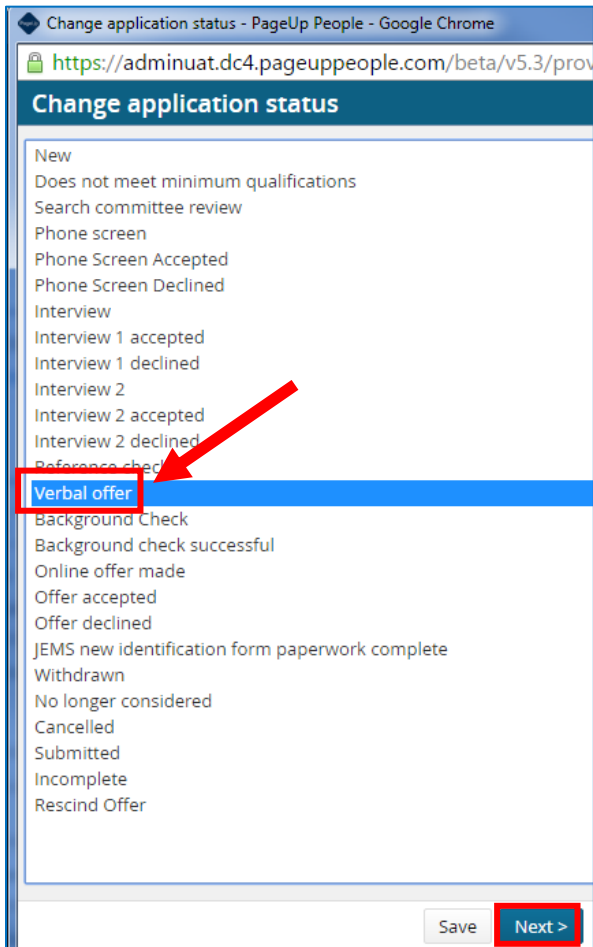
3. Change the status of the applicant:



No offer Actions

- Add activity Resume
- Add document
- Add document from file
- Add note
- Assign application
- Change status**
- Communicate
- Compile and send
- Edit application flags View
- Edit application source
- New booking to an existing event
- New booking to a new event
- New task/reminder
- New form
- Offer details
- Send application
- Send application and change status
- View references View
- Undiscover application

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):

Confirm status change

From status: New
To status: Verbal offer

Communication template: -- No template --

E-mail: Applicant: Yes No

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

Additional users from Job: Yes No


Status	Date	Time	User
<input checked="" type="checkbox"/> New application	6 Sep 2016	12:44 pm	RICHARD PAGE
<input checked="" type="checkbox"/> Pre-offer check	7 Sep 2016	11:16 am	ERICA FINI-MARTEN
<input type="checkbox"/> Interview 1	dd mmm yyyy		--
<input type="checkbox"/> Interview 2	dd mmm yyyy		--
<input type="checkbox"/> Line manager review 1	dd mmm yyyy		--
<input type="checkbox"/> Offer accepted	dd mmm yyyy		--
<input type="checkbox"/> Offer declined	dd mmm yyyy		--
<input type="checkbox"/> Offer made	dd mmm yyyy		--

[+ Show all](#)

Note

The following will be added to the applicant notes for administrators to view:

Move now Cancel Spell check



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: 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**

Start date:* **B**

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

Empl class: Academic Staff-Renewable

FTE:* **D**

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
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

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**

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:

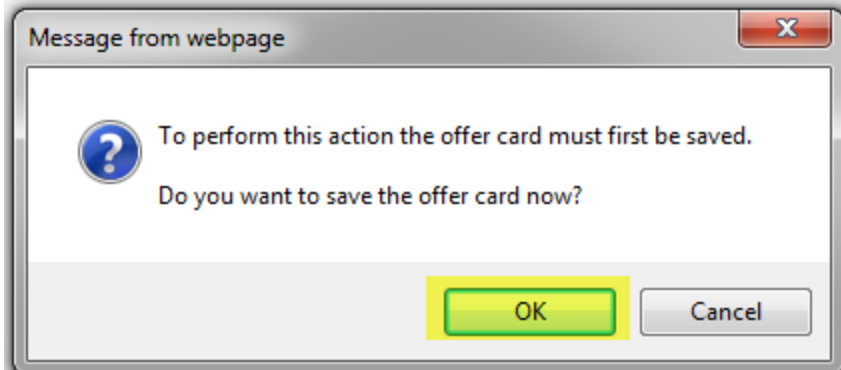
8. Near the bottom of the page you will add all documents associated with the offer. There are pre-loaded templates for offer letters as well as attachments. You can upload as many documents as you'd like or compile all of your documents into one upload. You will also have the option to Merge documents.


Offer documents

Documents attached to the offer appear in the section below.

Add document Merge document ? Q

Document	Date	Size	Category
Document library:			
Name	Date	Size	
Offer Letters (14)			R
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.**

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 Name	Date	Size	Action
<input type="checkbox"/> Offer Letters			
<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
<input checked="" type="checkbox"/> Offer Letter Attachments			
<input type="checkbox"/> Academic Staff Policies and Procedures (ASPP).pdf	19 May 2016	431Kb	View
<input type="checkbox"/> AttachmenttoOffer orAppointmentLetter.doc	19 May 2016	45Kb	View

10. You will return to the offer card. Click on View 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	
Academic Staff Renewable Offer Letter.rtf	21 Sep 2016	39Kb	Offer Contracts	View Delete

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

Documents attached to the offer appear in the section below.

Add document Merge document ?

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

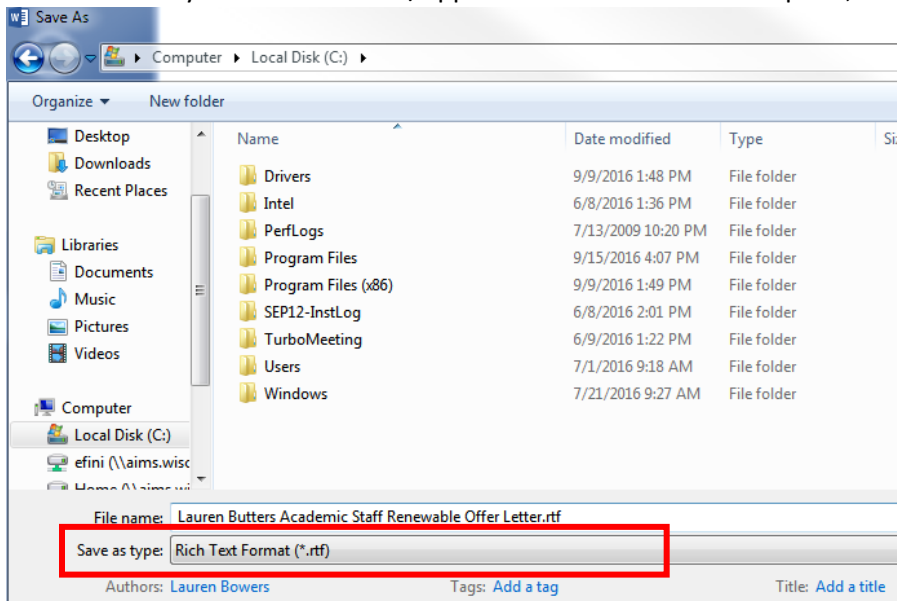
Document library:

Name	Date	Size
Offer Letters (14)		
Offer Letter Attachments (2)		
Report templates (1)		

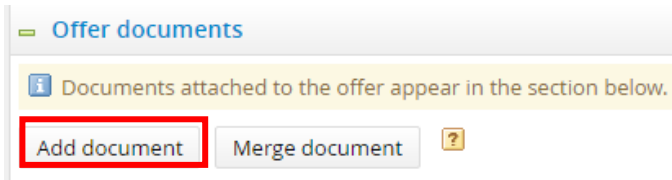
Save and close Save Remove Offer Cancel

Academic Staff Ren...rtf ^

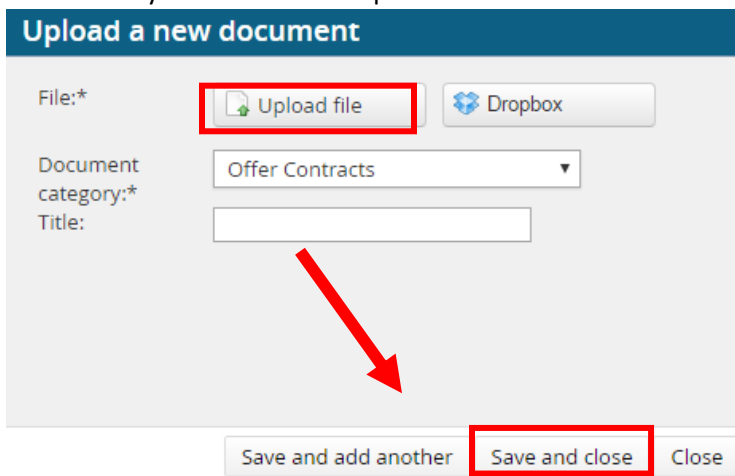
12. Make necessary edits to the Offer/Appointment letter. Once complete, save the document to your computer:



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.



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:



15. 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

16. 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

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

adminuat.dc4.pageuppeople.com says:

Are you sure you want to delete this document?

[OK](#) [Cancel](#)

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

Application documents

Documents uploaded by the applicant are displayed in blue.
Documents belonging to a different application are marked with an asterisk (*).

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

19. Choose your division's approval process:

The screenshot displays a web application interface with a dropdown menu open. The dropdown menu is highlighted with a red border and contains the following options:

- None
- A01/A02-Gen Education Admin/Gen Services
- A02/A03-ASU
- A0205-OVPCDO/DDEE-Staff
- A0206-Undergraduate Advising
- A022460-University Marketing
- A022470-University Communications
- A04 - Dean of Students
- A05-Enrollment Mgmt
- A06-DoIT
- A07 - CALS
- A10 - International Studies
- A12 WSoB
- A17-Education
- A18-Arts Institute
- A19 - Engineering
- A27 - SoHE
- A34-OVCRGE
- A42 - Athletics
- A45-Law School



The background interface includes a document viewer with the following elements:


- Application documents
- Documents uploaded by the applicant
- Documents belonging to a different user
- Title: Demo Outline.docx
- Page 1 of 1
- Approval process: None
- Originator:*
- Records 1 to 1 of 1



At the bottom of the interface, there are four buttons: Save and close, Save, Remove Offer, and Cancel.



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.

Approval process

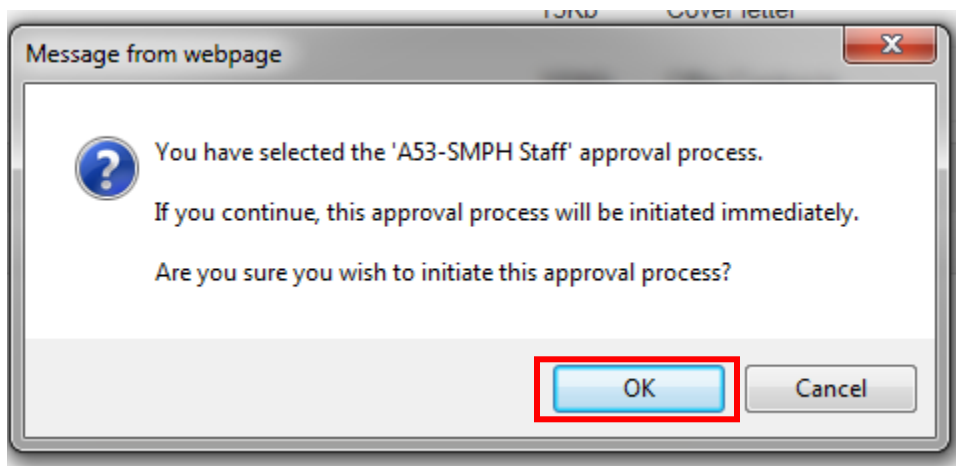
Originator:*  

Approval process: 

1. Department Approval:  
No user selected.

2. Division HR Approval:  
No user selected.

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.

Originator:* **Your Name**
Approval process: A53-SMPH Staff

Approval workflow initiated: 3 Nov 2016, 3:20 pm

1. Department Approval: Christine Radmin You are here
2. Division HR Approval: Christine Relegate

Save and close Save Cancel **Approve** Decline

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':

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
- Background check successful
- Online offer made**
- Offer accepted
- Offer declined
- JEMS new identification form paperwork complete
- Withdrawn
- No longer considered
- Cancelled
- Submitted
- Incomplete
- Rescind Offer

Save **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

i 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:*

Subject:*

Message: [Merge fields](#)

Format selection **B** *I* Tools

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 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:*

i 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

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

The screenshot shows the University of Wisconsin-Madison job offer portal. At the top, a red banner displays the university name. Below it, a navigation bar includes 'Welcome SJP', 'Home', 'Update profile', and 'Update resumé'. A yellow notification box states: 'You have been made an employment offer for your HEPATOLOGY & TRANSPLANT HEPATOLOGY PHYSICIAN (A534250-MEDICAL SCHOOL/MEDICINE/GASTROENT) application. View Offer'. A second red banner is at the bottom. The main content area is titled 'Employment offer' and contains the text: 'Congratulations, you have been made an employment offer for your HEPATOLOGY & TRANSPLANT HEPATOLOGY PHYSICIAN (A534250-MEDICAL SCHOOL/MEDICINE/GASTROENT) application.' Below this text are three buttons: 'I accept', 'I decline', and 'Back to home'.

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

Accepted Job Offer Michael Kors, TRAIN72783-AS, RESEARCH SPECIALIST (A348800-GRADUATE SCHOOL/PRIMATE/PRIMATE)

uwjobs@wisc.edu <uwjobs-767@mail.pageuppeople.com>
to me ▾

Michael Kors has accepted the offer for:
RESEARCH SPECIALIST (A348800-GRADUATE SCHOOL/PRIMATE/PRIMATE)
TRAIN72783-AS
DEPT-A3488/VCRGE/PRIMATE/PRIMATE

This is an automatic message from the Talent Recruitment and Engagement Management System - TREMS.

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 CHRIS-HR/JEMS Hire:

