Creating Offers

This guide describes how to create and extend an offer using a written offer, such as e-Offer, or verbal offer.

Before You Begin:
Before you can create an offer, the candidate must be in the Offer step and the Offer to be Made status. This procedure should be used for any candidate whom you intend to offer employment.

Contents
Creating Offers .................................................................................................................................................. 1
Entering Information in the Offer Matrix ........................................................................................................ 2
Creating an Offer Letter Using a Template ....................................................................................................... 3
Requesting Offer Approvals.................................................................................................................................. 5
Extending an Offer .............................................................................................................................................. 7
What the Candidate Sees through an e-Offer ................................................................................................... 9
Capturing a Manual Offer Response .................................................................................................................. 10
Entering Information in the Offer Matrix

Entering information into the offer matrix is required for all candidates who progress to the Offer step. When planning to hire a candidate, you must complete the fields in the General Terms section. If you are going to use an offer letter template, CU Careers includes information from the offer matrix in the template.

To enter offer matrix information:

1. Click **Candidates** from the menu bar.
2. Select the candidate for whom you want to create an offer.
3. Click **More Actions**.
4. Choose **Create Offer**. The selected candidate file opens at the Offer tab. New offers appear in the middle and are editable.

5. Select an **Expiration Date** (optional).

6. Select a **Contract Start Date** (optional).

7. Select a **Start Date** (required).
8. Specify all **Salary, Pay Basis, and Annualized Salary** (required).

<table>
<thead>
<tr>
<th>Currency</th>
<th>US Dollar (USD)</th>
<th>Yearly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary (Pay Basis)</td>
<td>5,000.00</td>
<td></td>
</tr>
<tr>
<td>Pay Basis</td>
<td>Monthly</td>
<td></td>
</tr>
<tr>
<td>Annualized Salary</td>
<td>60,000.00</td>
<td></td>
</tr>
</tbody>
</table>

9. Enter bonus information, if applicable.

<table>
<thead>
<tr>
<th>Bonuses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relocation Amount</td>
</tr>
<tr>
<td>Relocation Package</td>
</tr>
<tr>
<td>Recruitment Incentive</td>
</tr>
</tbody>
</table>

10. If you plan to create an offer letter using an offer letter template, continue with the following procedure.

Or,
If you are not creating an offer letter, click **Save and Close** and continue to **Requesting Offer Approvals**.

### Creating an Offer Letter Using a Template

This section describes how to create offer letters using templates. Offer letter templates have been added by campus system administrators in Human Resources. If you are unsure about which template to use, contact your campus HR office.

To create an offer letter:

1. Click **Create**.

   The Offer Letter Assistant window appears.

2. Click the button to the right of the from template box.

3. Click **Select** next to the appropriate offer template.

4. Select the box next to the content you want to use.

5. Click **Edit**.

6. Make any edits to the offer.
7. If applicable, add an attachment:
   a. Click **Browse** to locate documents on your computer.

   ![Offer Letter Assistant](Offer Letter Assistant.png)

   **Note:** After it’s uploaded, the filename of your document will appear below the Attachments field.

   ![Offer Letter Assistant](Offer Letter Assistant.png)

   b. Select your document, and click **Attach**.

   ![Offer Letter Assistant](Offer Letter Assistant.png)

8. Click **Preview** to view the letter as the candidate will see it.

9. Click **Finish**.
Requesting Offer Approvals

After you have entered offer details into the offer matrix and created the offer, either from scratch or through using an offer template, the next step is to request approval.

1. Click **More Actions**.
2. Select **Request Approval**.
3. From the Quick Filters area, search for an approver.

4. From the After Approval area, assign who should receive the approval next, if applicable. Selected approvers are displayed, in order, on the right.

5. Enter **Comments** and click **Done**.

The system sends an email to the first approver. The system also progresses the candidate to the Step of Offer with a Status of Approval in Progress.

<table>
<thead>
<tr>
<th>Result</th>
<th>0%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>176557</td>
</tr>
<tr>
<td>Required</td>
<td>0 / 0</td>
</tr>
<tr>
<td>Assets</td>
<td>0 / 0</td>
</tr>
<tr>
<td>Step</td>
<td>Offer</td>
</tr>
<tr>
<td>Status</td>
<td>Approval in Progress</td>
</tr>
<tr>
<td>Other Submissions</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>0</td>
</tr>
<tr>
<td>Inactive</td>
<td>0</td>
</tr>
</tbody>
</table>
The approver receives an email asking for approval of the offer. The approver must click **Respond** to either accept the offer or decline it.

Clicking **Respond** opens an internet browser window where the approver can select a response.

After the approver responds to the request, an email is sent to the approval requestor listing the responses. **Note:** If multiple approvers are included in the approval path, the process will function like a chain where the second approver will receive the request only after the first approver responds.
After the offer has been approved, the system progresses the candidate to a Step of Offer with a Status of Approved.

<table>
<thead>
<tr>
<th>Result</th>
<th>0%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>178667</td>
</tr>
<tr>
<td>Required</td>
<td>0 / 0</td>
</tr>
<tr>
<td>Assets</td>
<td>0 / 0</td>
</tr>
<tr>
<td>Step</td>
<td>Offer</td>
</tr>
<tr>
<td>Status</td>
<td>Approved</td>
</tr>
<tr>
<td>Other Submissions</td>
<td></td>
</tr>
<tr>
<td>Active (0)</td>
<td></td>
</tr>
<tr>
<td>Inactive (0)</td>
<td></td>
</tr>
</tbody>
</table>

Extending an Offer

After all required approvals have been received and the offer letter has been created, the offer can be extended to the candidate using the following options:

- In writing, such as e-Offer (provides method of electronic signature), email, or printed letter.
- Verbally, such as through a phone call or meeting.

The following procedure describes both written and verbal offers.

To extend an offer:
1. From the candidate’s profile, click More Actions.
2. Click Extend Offer. Your options are to extend the offer in writing (shown below), or verbally (shown after written).
   - To extend an offer in writing:
     a. Select Extend in writing.
b. Click **Done**.

c. Select your method of delivery for the offer letter (Email, e-Offer, or Printed Letter).

d. Click **Next**.

- To extend an offer verbally:

  a. Select **Extend verbally**.

    ![Extend Offer]

    - To extend an offer verbally:
      
      b. Type or select the date of the verbal offer.

      c. Click **Done**.

3. After reviewing the offer, click **Send**.

   **Note:** What the candidate sees through an e-Offer is described in the following section. If you chose to offer verbally, the candidate’s response needs to be recorded as described in **Capturing a Manual Offer Response**.
What the Candidate Sees through an e-Offer

When you select e-Offer as the method of delivery, the candidate receives an email with a link to log into CU Careers and view the offer details.

Dear Janis,

Welcome to the University of Colorado! We are excited to extend a formal offer of employment to you for the position Technical Paralegal (Posting) (02356).

Please review the details of this job offer and provide your response online. If you have questions or comments, please contact your new supervisor.

To access the site, please log in with the username “Moonbeam” and the password that you created.

Best Regards,

University of Colorado

Anschutz Medical (AMC)

Please do not reply to this email. Replies to this message are undeliverable.

After the candidate logs into the CU Careers account, he or she can view the offer language from the template. The candidate can also view and download the offer letter as an attachment.

To accept the offer:

1. The candidate selects **Accept the offer** to electronically sign the offer letter.
2. The candidate types his or her **Full Name** and **Initials** and clicks **Submit**.
Capturing a Manual Offer Response

This section describes capturing, or recording, a candidate’s response to an offer. This should be performed when using the verbal offer option, or when creating the offer letter outside of CU Careers.

1. From the candidate’s profile, click **More Actions**.
2. Click **Capture Response**.
3. Select the response that best describes the candidate’s response.

```
<table>
<thead>
<tr>
<th>Capture Offer Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>How did the candidate respond to the offer?</td>
</tr>
<tr>
<td>☐ The candidate accepted the offer</td>
</tr>
<tr>
<td>☐ The candidate wants to negotiate the offer</td>
</tr>
<tr>
<td>☐ The candidate refused the offer</td>
</tr>
</tbody>
</table>
```

4. Enter the date when the offer was accepted and the start date.

5. Click **Done**.