

CU Careers: Step-by-Step Guide

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.

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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:

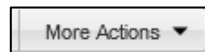
1. Click **Candidates** from the menu bar.



2. Select the candidate for whom you want to create an offer.

Candidates				
<div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div>More Actions</div> </div>				
Candidate	2 ▲	Req. ID, Title	1 ▲	Selection Step, Status
▼ 01577 - Assistant Professor of Public Relations				
Cleaver, June (48420)		01577 - Assistant Professor of Public Relations		Interviews - Interview
<input checked="" type="checkbox"/> Simmons, Gene (48860)		01577 - Assistant Professor of Public Relations		New - To be Reviewed

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.

Save Save and Close Cancel

Offer (New) Requisition

Top Section

Created on

Feb 3, 2015

Expiration Date

Status

Draft

Approved

Extended

Contract Start Date

General Terms

Start Date

Leave Blank

Currency

US Dollar (USD)

US Dollar (USD)

Salary (Pay Basis)

Pay Basis

Not Specified

Yearly

Annualized Salary

Bonuses

Relocation Amount

Relocation Package

Not Specified

Recruitment Incentive

Details

Letter Used

Create...

Comments

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

Expiration Date

Mar 1, 2015, 12:00 AM

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

Contract Start Date

7. Select a **Start Date** (required).

Start Date

Mar 16, 2015, 12:00 AM

8. Specify all **Salary**, **Pay Basis**, and **Annualized Salary** (required).

Currency	US Dollar (USD) ▼	US Dollar (USD)
Salary (Pay Basis)	5,000.00	
Pay Basis	Monthly ▼	Yearly
Annualized Salary	60,000.00	

9. Enter bonus information, if applicable.

Bonuses	
Relocation Amount	
Relocation Package	Not Specified ▼
Recruitment Incentive	

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**.

Details	
Letter Used	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.

Language	Code	Name	Intended for	
English	CU_Classified_Staff_Offer	CU Classified Staff Offer Letter	All candidates	Select
English	CU_Faculty_Offer	CU Faculty Offer Letter	All candidates	Select
English	CU_University_Staff_Offer	CU University Staff Offer Letter	All candidates	Select

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

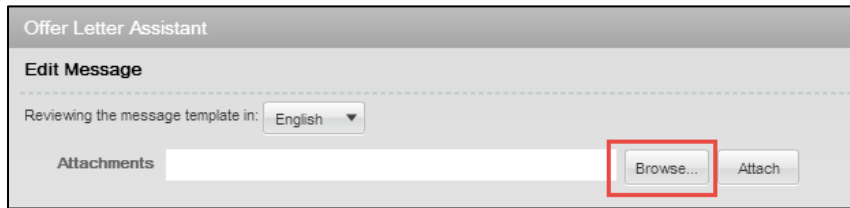
Select the paragraphs to include in the message
<input checked="" type="checkbox"/> Boulder- University Staff Offer Letter
<input checked="" type="checkbox"/> Denver-University Staff Offer Letter
<input checked="" type="checkbox"/> Colorado Springs- University Staff Offer Letter

5. Click **Edit**.

Edit

6. Make any edits to the offer.

7. If applicable, add an attachment:
 - a. Click **Browse** to locate documents on your computer.



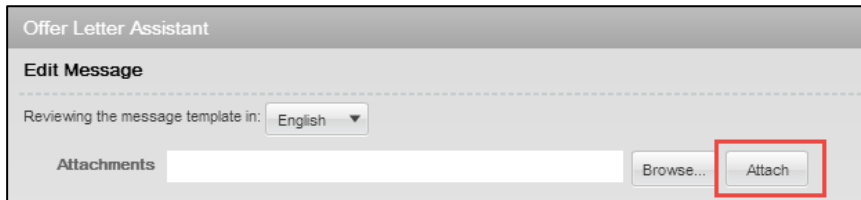
Offer Letter Assistant

Edit Message

Reviewing the message template in: English ▼

Attachments

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



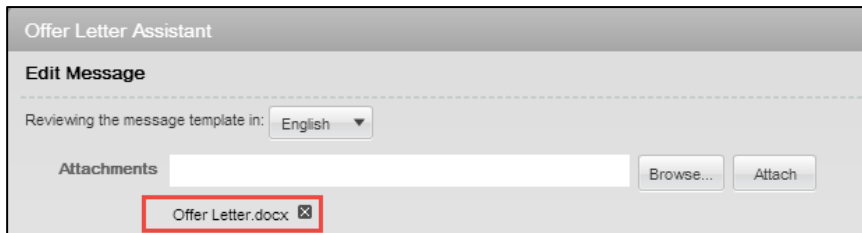
Offer Letter Assistant

Edit Message

Reviewing the message template in: English ▼

Attachments

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



Offer Letter Assistant

Edit Message

Reviewing the message template in: English ▼

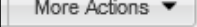
Attachments

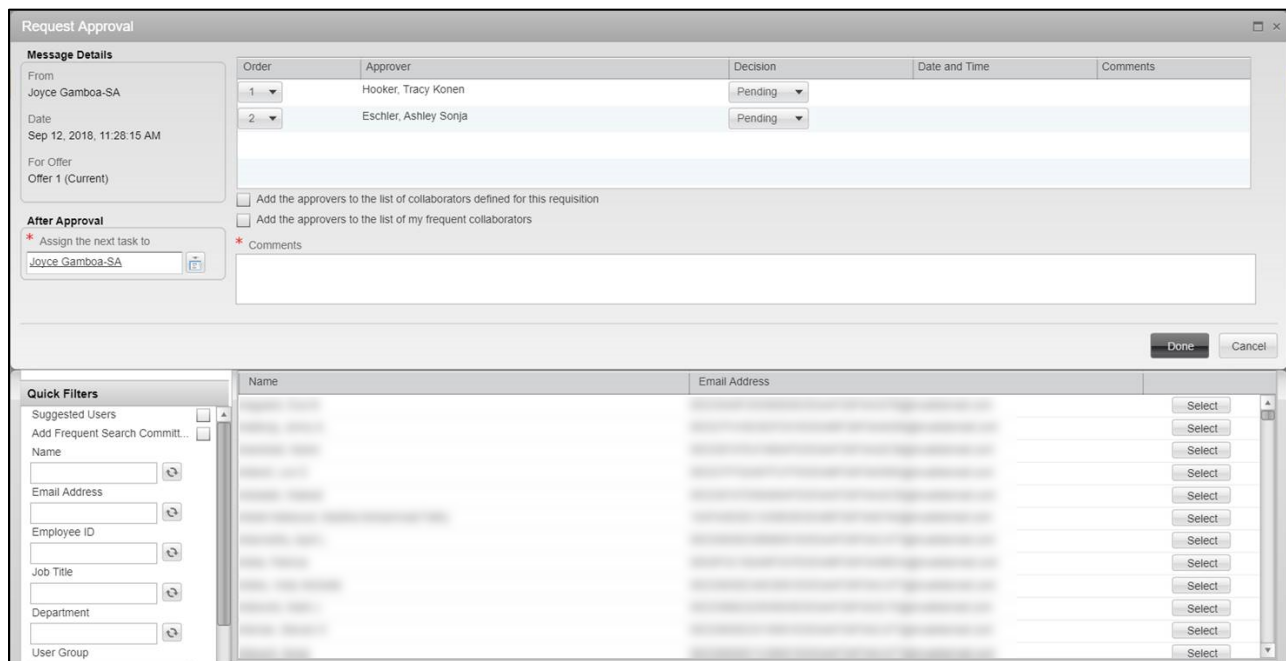
Offer Letter.docx

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.

Result	0%
ID	176557
Required	0 / 0
Assets	0 / 0
Step	Offer
Status	Approval in Progress
Other Submissions	
<u>Active (0)</u>	
<u>Inactive (0)</u>	

The approver receives an email asking for approval of the offer. The approver must click **Respond** to either accept the offer or decline it.

You have received an offer approval request. Please view the details below.

Requisition Title: **Director of Development, College of Engineering and Applied Science**
 Requisition ID: **02613**
 Requested by: **Elijah Olachea**
 Comments: **test**

Click "Respond..." to view more offer details and respond to the approval request as soon as possible.
[Respond...](#)

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

Offer Approval Request Done Cancel

Requisition **Director of Development, College of Engineering and Applied Science**
 Candidate **Kari A Bond**
 Requested by **Elijah Olachea**
 Comments **test**

Please review the Offer Information Summary and respond to the approval request as soon as possible.

In response to Elijah Olachea's approval request:

[Offer approval path details](#)

Comments (required if you do not approve the offer)

☐ Send me an email with my decision

Done Cancel

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.

Approval Path

Approver	Decision	Date and Time	Comments
Brynn Ashley Shader	Approved	Apr 26, 2016, 1:21:49 PM	Yes! This is a great candidate.

This approval was requested by on April 26, 2016.
 Best regards,
 Human Resources

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

After the offer has been approved, the system progresses the candidate to a Step of Offer with a Status of Approved.

Result	0%
ID	176557
Required	0 / 0
Assets	0 / 0
Step	Offer
Status	Approved
Other Submissions	
Active (0)	
Inactive (0)	

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**.

Extend Offer

Expiration Date Mar 1, 2015, 12:00 AM

Start Date Mar 16, 2015, 12:00 AM

Target Start Date Not Specified

How do you want to extend this offer?

☒ Extend in writing

☐ Extend verbally, on Feb 16, 2015

☐ Capture candidate response

Comments

- 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

Expiration Date Not Specified

Start Date Apr 3, 2015, 12:00 AM

Target Start Date Not Specified

How do you want to extend this offer?

☐ Extend in writing

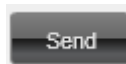
☒ Extend verbally, on Apr 3, 2015

☐ Capture candidate response

Comments

- b. Type or select the date of the verbal offer.
- c. Click **Done**.

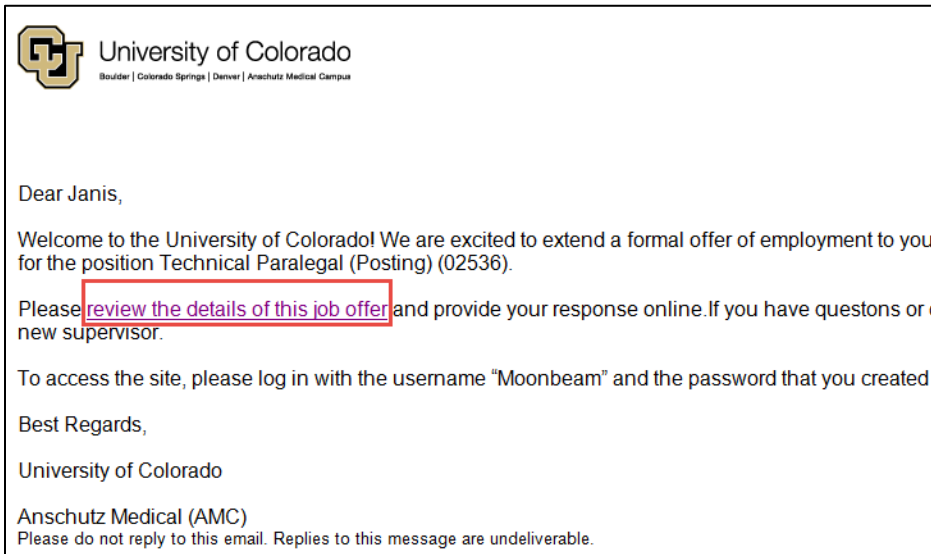
3. After reviewing the offer, click **Send**.



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.



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.

Select from the 1-9 options

I am very excited for you to join our team! I look forward to hearing from you.

Sincerely,

Attachments

- [Offer Letter.docx](#)

Offer Response

Do Not E-Sign Until You Have Read The Above Offer

☒ Accept the offer

☐ Refuse the offer

*Full Name

Joplin, Janis

*Initials

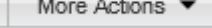
Submit Cancel

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.

Capture Offer Response

How did the candidate respond to the offer?

☒ The candidate accepted the offer

☐ The candidate wants to negotiate the offer

☐ The candidate refused the offer

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

Capture Offer Response

When did the candidate accept the offer?

Accepted on (Event Date)

When will the candidate start working?

Start Date

Apr 27, 2015, 12:00 AM ☐ Tentative

5. Click **Done**. 