University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

EMPLOYEE SERVICES

CU Careers: Step-by-Step Guide

Creating Offers

This guide describes how to create and extend an offer using an e-Offer, written offer, or verbal offer. Before users can create an offer, the candidate must be in the **Offer** step and the **Offer to be Made** status. This guide should be used for any candidate whom you intend to offer employment.

Entering Information in the Offer Matrix

This section describes how to enter information into the offer matrix. This step is required for all candidates who are progressed into the Offer step. If you plan to hire a candidate, you must complete the fields in the general terms section. Information entered into the offer matrix is included in an offer letter template, if you choose to use this feature.

To enter offer matrix information:

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

2. Select the candidate's name that you want to create an offer for.

3. Click **More Actions**.

4. Select **Create Offer**. The selected candidate file is launched, displaying the Offer tab. New offers appear in the center in edit mode.

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

| Expiration Date | Mar 1, 2015, 12:00 AM |

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

| Contract Start Date | |

7. Select **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	

Bonuses

Relocation Amount	
Relocation Package	Not Specified
Recruitment Incentive	

9. Enter bonus information, if needed.

10. If you are using the offer letter creation tool, continue with the following procedure.
Or,
If you are not creating an offer letter, click **Save and Close**.

Creating an Offer Letter Using a Template

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

To begin creating an offer letter:

Details

Letter Used	Create...

1. Click **Create** (next to Letters Used).
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 template you want to use.

Select the paragraphs to include in the message

☑ Boulder- University Staff Offer Letter

☑ Denver-University Staff Offer Letter

☑ Colorado Springs- University Staff Offer Letter

5. Click **Edit** from the bottom left of the window. `Edit`

6. Make the required edits to the offer.

7. Click **Finish**. `Finish`

Requesting Offer Approvals

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

1. Click **More Actions**. `More Actions ▼`

2. Select **Request Approval**, and search for your approvers by name.

Quick Filters	Name	Email Address	
Suggested Users ☐	Aagaard, Eva M	eva.aagaard@ucdenver.edu	Select
Add Frequent Search Committe... ☐	Aalborg, Jenny A.	jenny.aalborg@ucdenver.edu	Select
Name	Aarestad, Karen	karen.aarestad@ucdenver.edu	Select
	Abbott, Lon D	lon.abbott@colorado.edu	Select
Email Address	Abdalati, Waleed	waleed.abdalati@colorado.edu	Select
	Abdel Maksoud, Madiha Mohammad Fathy	madiha.abdel-maksoud@ucdenver.edu	Select
Employee ID	Abernethy, April L	april.abernethy@colorado.edu	Select
	Abila, Patricia	pabila@uccs.edu	Select
Job Title	Ables, Holly Michelle	holly.ables@ucdenver.edu	Select
	Ablowitz, Mark J	mark.ablowitz@colorado.edu	Select
Department	Abman, Steven H	steven.abman@ucdenver.edu	Select
	Abosch, Aviva	aviva.abosch@ucdenver.edu	Select
User Group	Abraha, Alemtsehai Ghebru	alemtsehai.abraha@ucdenver.edu	Select
All ▼	Abraham, Douglas J	doug.abraham@ucdenver.edu	Select
Keyword	Abtahi, Matthew Ahmad	matthew.abtahi@colorado.edu	Select
	Accurso, Frank J	frank.accurso@ucdenver.edu	Select
		1000 users available	

3. After you find your approver, click **Select** to the right of the person's name, enter a comment, and click **Done**.

This system sends an email to the approver. The system also moves 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	
Active (0)	
Inactive (0)	

The approver receives an email asking them to approve 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 a tab in an internet browser window where the approver can select a response.

Done   Cancel

Offer Approval Request

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:

[I approve this offer ▼]

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 candidate is automatically moved 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 in Writing

After all required approvals have been received and the offer letter has been accepted, it can be extended to the candidate in several ways. This section describes how to extend an offer in writing. You can select different options for extending the offer in writing, such as e-Offer, email, or printed letter.

1. From the candidate's profile, click **More Actions**.

2. Click **Extend Offer**.

3. Select **Extend in Writing**.
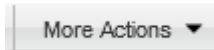
Extend Offer

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

4. Click **Done**.

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

6. Click **Next**.
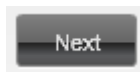
7. After reviewing the offer, click **Send**.
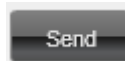
Extending a Verbal Offer

This section explains how to capture the candidate's response to a verbal offer.

1. From the candidate's profile, click **More Actions.** More Actions ▼
2. Click **Extend Offer**.
3. 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

4. Type or select the date of the verbal offer.

5. Click **Done**. Done
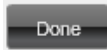
Capturing a Manual Offer Response

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**. More Actions ▼

2. Click **Capture Response**.

3. Select the response that best describes the candidate's response.
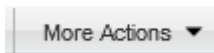
Capture Offer Response

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

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 A ☐ Tentative

4. Enter the date when the offer was accepted and the start date.
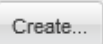
5. Click **Done**. Done
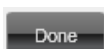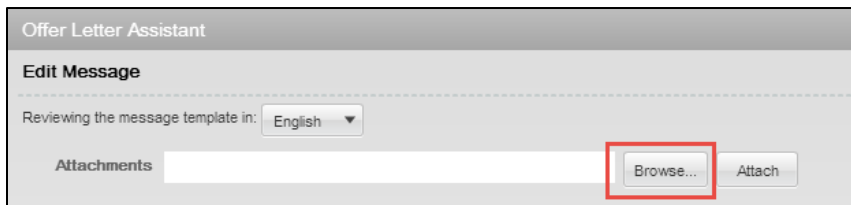
Adding an Attachment to an Offer

This section describes how to add attachments to the offer letter. Additionally, this section can also be used to add the actual offer letter as an attachment.

If users are not using templates in CU Careers to build offer letters, but would like to capture the response of a candidate using the e-Offer functionality, users can use a template that contains a custom paragraph informing the candidate that the attachment will have the offer details. The candidate will then be able to respond electronically.

1. Enter information into the Offer Matrix as described at the beginning of this document.

2. Click **Create** next to Letters Used. Create... The Offer Letter Assistant window appears.

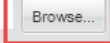| Language	Code	Name	Intended for	
English	CU_Classified_Staff_Offer	CU Classified Staff Offer Letter	All candidates	Select
English	CU_Faculty_Offer	CU Faculty Offer Letter	All candidates	Select
English	CU_University_Staff_Offer	CU University Staff Offer Letter	All candidates	Select

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

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

5. Click **Edit**. Edit

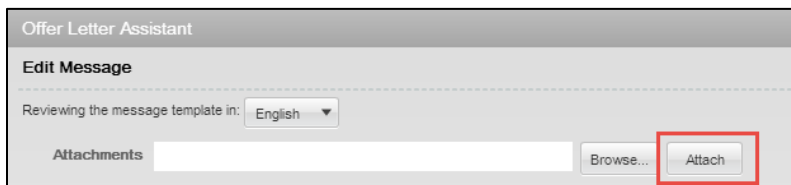6. From the **Attachments** field at the top of the page, click **Browse.**

Offer Letter Assistant

Edit Message

Reviewing the message template in: English ▾

Attachments [_____] Browse... Attach

7. Locate your document on your computer, and click **Attach.**

Offer Letter Assistant

Edit Message

Reviewing the message template in: English ▾

Attachments [_____] Browse... Attach

Note: The title of your document appears below the **Attachments** page after it's uploaded.

Offer Letter Assistant

Edit Message

Reviewing the message template in: English ▾

Attachments [_____] Browse... Attach

Offer Letter.docx ⊠

8. Click **Finish**. Finish

9. Click **Save and Close**.

10. Click **More Actions**.

11. Select **Extend Offer**.

12. Select **Extend in Writing**.

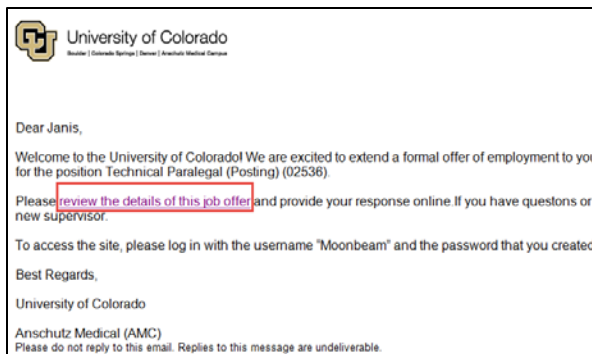13. Select **e-Offer** as the method of delivery.

14. Click **Next**.

15. After reviewing the offer and ensuring there are no errors, click **Send**.

What the Candidate Sees

When you use the method described above, the candidate will take the following steps.

1. The candidate receives an email with a link for the candidate to log into CU Careers and view the offer details.

2. When the candidate logs into the CU Careers account, he or she can view the language included from the template and the offer letter as an attachment, which the candidate can click on and download.

3. The candidate can click **Accept the offer** to electronically sign the offer letter.

4. The candidate types his or her **Full Name** and **Initials** and clicks **Submit**.