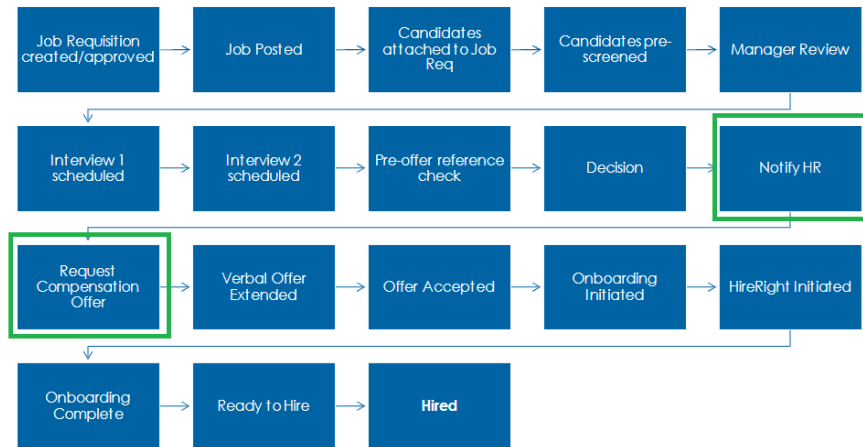


## Making an offer

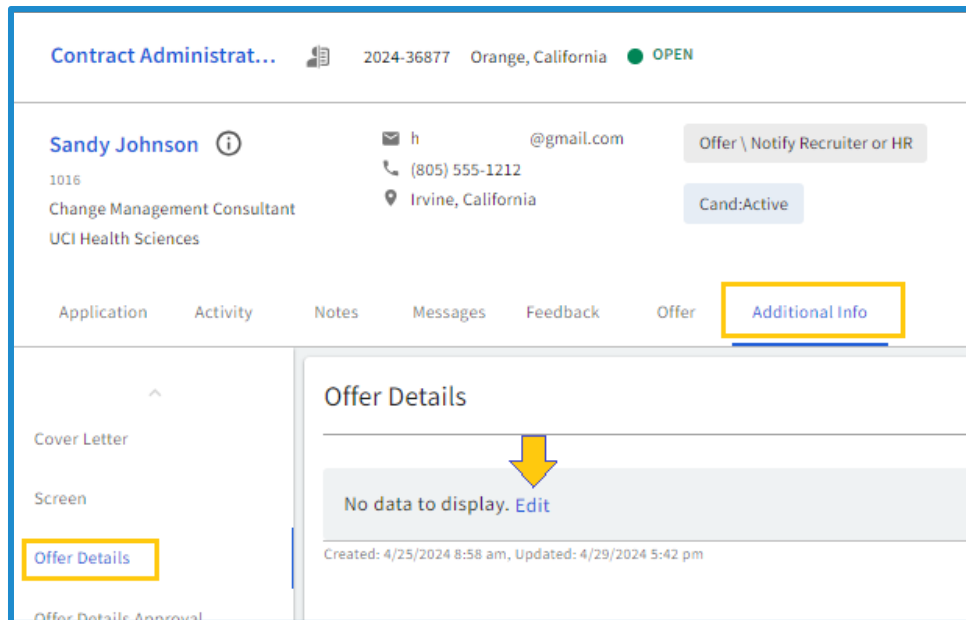
Once a decision has been made, the offer details need to be determined and offer letter prepared. To start this process detailed in this document, the Hiring Manager will notify the Recruiter or Local HR they want to extend an offer.

# APPLICANT TRACKING PROCESS FLOW



## Create Offer Letter

- Navigate to the **Job profile** for which you want to create an offer, and click the **Candidates** tab.
- Click on the candidate for whom an offer is to be prepared, once inside the candidate click on **Additional** Info, on the left side click on Offer Details, when the screen is presented, press **Edit**



- Complete the offer details using the approved values listed in the drop-down boxes. For freeform fields
  - **Offer Expiration** – Using the calendar, select a date for when the offer will expire.
  - **Position Number** – enter the position number used to create the job requisition. For multiple job requisitions, enter one of the unused position numbers.
  - **Salary Plan for this Offer** – For Represented positions, select the correct step for the position.
  - **Hourly/Monthly/Annual Compensation Amount** – Enter the compensation amount in the appropriate field for this position. It is only necessary to enter information in Annual Compensation the field that is used in the offer letter.
  - **Difference to Healthcare Minimum** – (For patient facing roles only) The difference between the negotiated step amount and the minimum wage as per California SB525.
  - **Counter Offer** - The original offer amount when a counter offer has been made.
  - **Hiring Bonus** – Indicate the full amount of the hiring bonus (if offered)
  - **Relocation Amount** – If relocation services are being covered, indicate the amount that will be provided.
- When all necessary information has been provided, press **Save**

Offer Details

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**COMPLETION OF OFFER DETAILS:** Prior to completing this tab please be sure to have reviewed the job posting, candidate profile, and interview assessment. The information entered here must be supported by the interview assessment, and accurately capture the Offer Hire Type and Action Reason

Offer Hire Type \* ▼

Offer Expiration (Standard - 3 business days) \* 📅

Position Number (Please be sure to select and verify the correct position number) \* ▼

Proposed/Confirmed Start Date \* 📅

Proposed NEO Date ▼

Salary Plan for this Offer (Mandatory for represented with step rate!) ▼

Hourly Compensation Amount USD ▼ Frequency: Annually ▼

Monthly Compensation Amount USD ▼ Frequency: Annually ▼

Annual Compensation Amount USD ▼ Frequency: Annually ▼

Difference to Health Care Minimum USD ▼ Frequency: Annually ▼

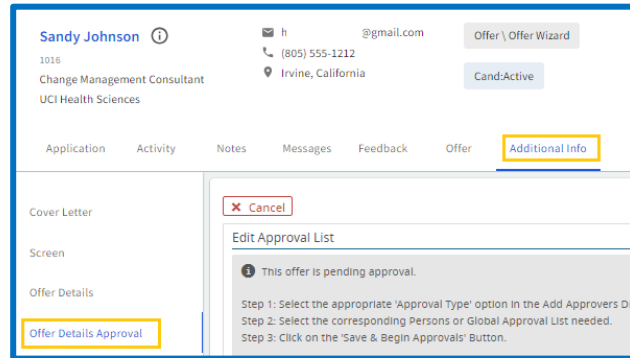
Counter Offer Amount (Do we hide?) USD ▼ Frequency: Annually ▼

Hiring Bonus USD ▼

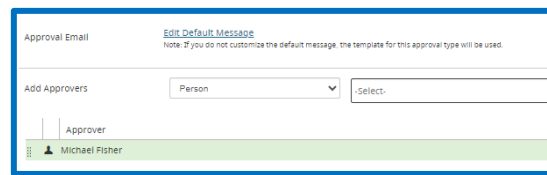
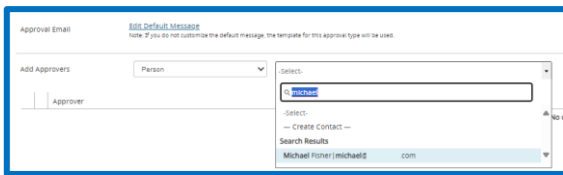
Relocation Amount USD ▼

Notes

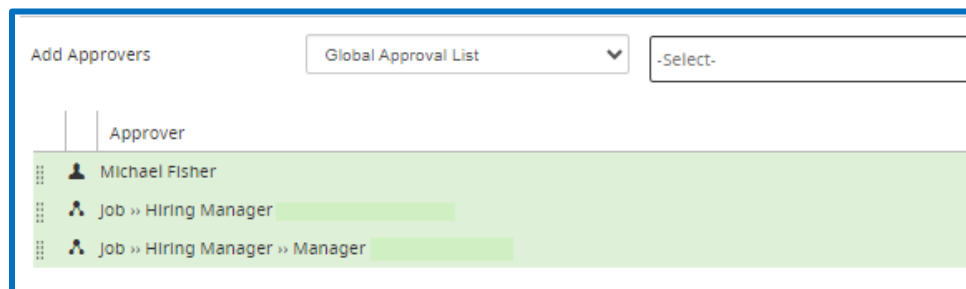
- To route the offer for approval, within the Additional Info section for the candidate, on the left side of the screen, click on **Offer Details Approval**, when the screen appears, click **Edit**



- Offer Approval may be requested either of individuals or a global address list, or a combination of the two. To add a specific person(s) to the approval list
  - With **Person** showing in the left selection box in the **Add Approvers** section, click into the **Select** dropdown and begin typing the person's name. When the name appears, click on the name. They have been added to the approval process.
  - Repeat this as many times as necessary until all names have been added to the approval.
  - You can add a new name by selecting **Create Contact** from the dropdown and then filling in the person's name and email.



- To add a predetermined list of approvers
  - Select **Global Approval List** in the left selection box. Click into the **Select** dropdown to search for and select the correct global approval list. Note that the global approval list will populate as individual persons, not as a list, so that individuals can be removed or moved within the newly-created list.



**Tips:**

- Person and Global Approval List selections may be made in any order, and adding a new selection will not overwrite existing approvers in the list.*

- *It is possible to add the same individual multiple times in an approval list. An individual who appears multiple times (by name and/or by relationship) will receive the approval request multiple times.*
- Click the **Save & Begin Approval** button.
- Click **OK** in the popup window to confirm the start of the approval process. The system will email each approver one at a time in the order they are listed. This process will continue until all approvers listed have responded.
- View the finalized approval process on the **Offer Approval** tab of the candidate's Recruiting Workflow profile. Each approver will be listed along with the status of their approval.
- **Warning: The link and/or approval buttons provided in the email to each approver will allow them to approve the offer and make comments without logging in. To avoid security concerns, this email should not be forwarded or carbon-copied to others.**

**Tips:**

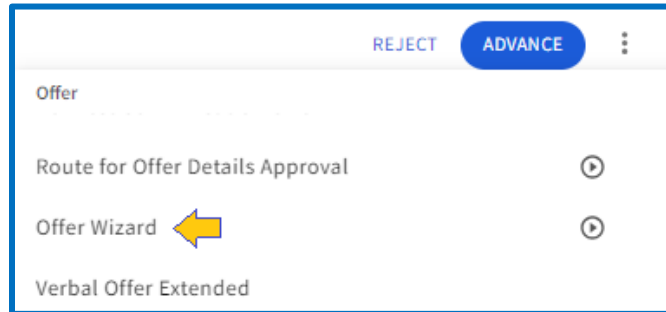
- *Resend approval emails as reminders to listed approvers by clicking the Resend button.*
- *Skip over any listed approvers to advance the approval process by clicking the Skip button.*
- The iCIMS system assigns a status to the approver so that the recruiter knows where the approval stands. These statuses can also be manually changed by users with appropriate permissions. The most common statuses are:
  - **Pending** - Approvers have been assigned, but the approval email has not been sent.
  - **Notified** - Approver has been notified, but hasn't yet viewed the email.
  - **Viewed** - Manager has viewed the approval email.
  - **Approved** - Job, candidate, offer, or iForm has been approved.
  - **Rejected** - Job, candidate, offer, or iForm approval has been declined.
  - **Skipped** - Recruiter has manually set the status to Skipped so that the process does not stall.
  - **Unable to Contact** - Email has not reached the recipient.

**Rejected Offer**

- An offer that was rejected can be continued by clicking **Resume Approval**, which will restart the process starting with the person who rejected the original offer.
- To restart a rejected offer approval from the beginning, click **Edit**, then click **Save & Begin Approval**.

## Creating an Offer Letter

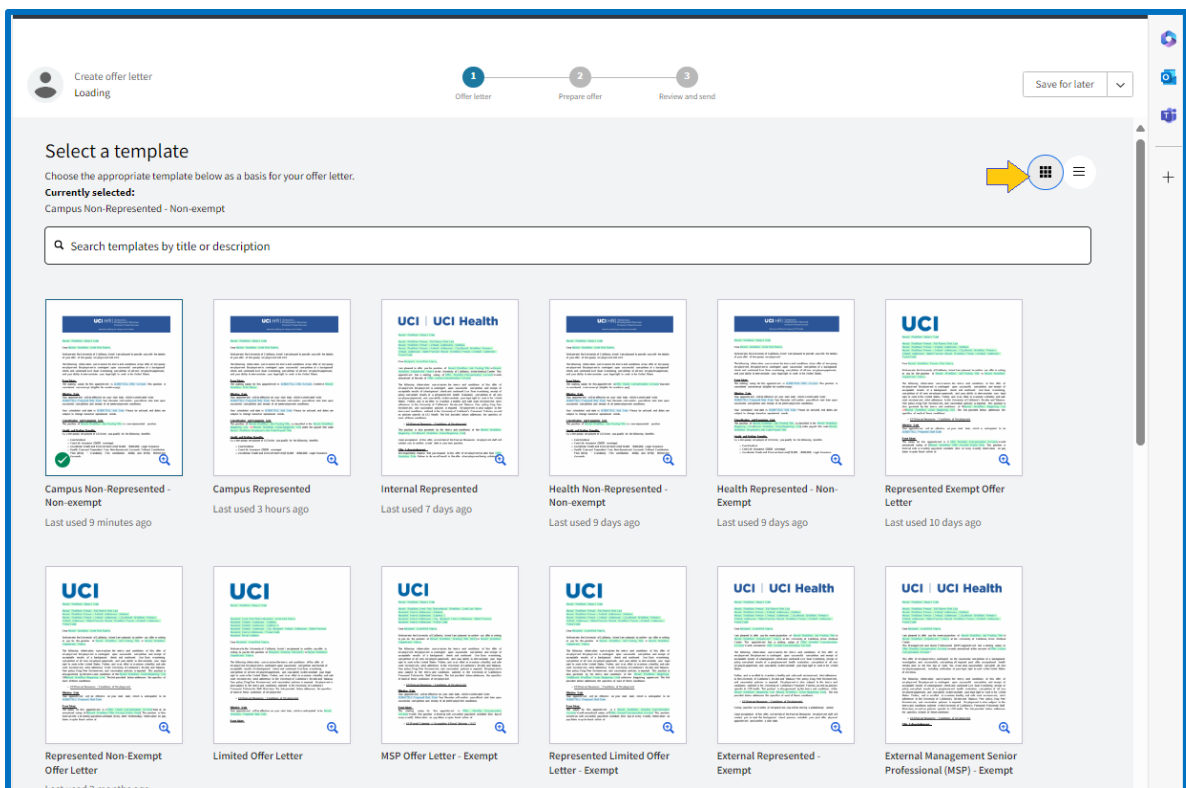
- To create an offer letter, Select the candidate, Click **Advance** and Select **Offer Wizard**.



- Preview an offer template in the first step of the **Offer Wizard** by selecting a template from the list view. A thumbnail of the offer template displays in the right-side panel. Clicking the magnifying glass or on the thumbnail displays a read-only popup of the full offer template.

### Tip:

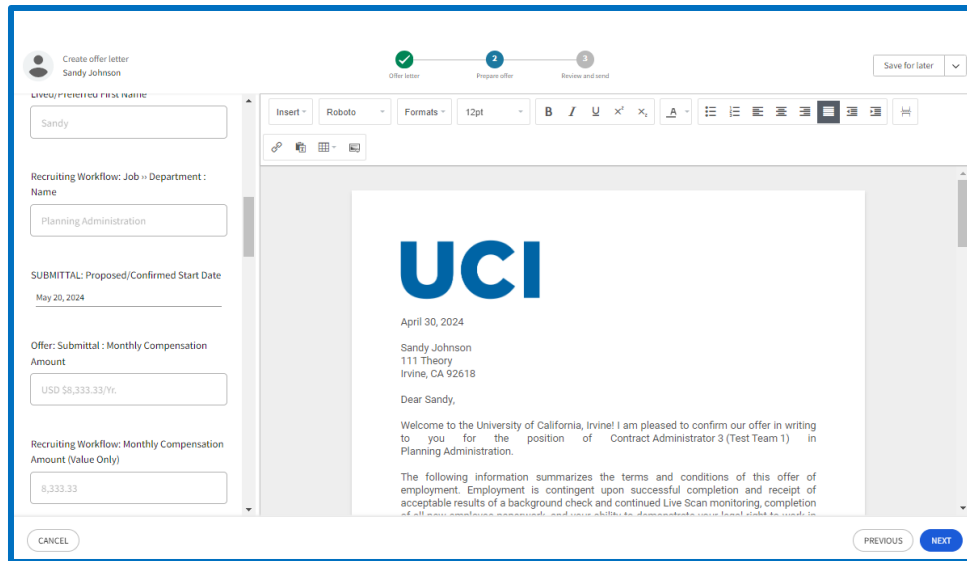
- *Users have the option to click the grid view icon near the top right of the page to view thumbnails of all available templates.*



- Select the applicable offer template.

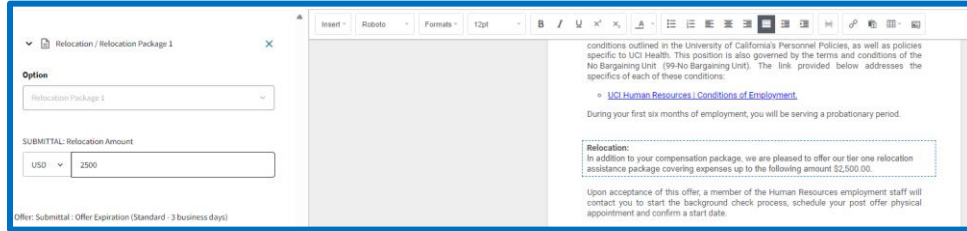
### Tip:

- *The template may be located by searching for its title or description within the search bar or by using the dropdown to the right of the search bar to filter by category. The dropdown filter options include All, My Templates, Uncategorized, and any customer-specific categories.*
- Click **Next**. The Prepare Offer page displays.

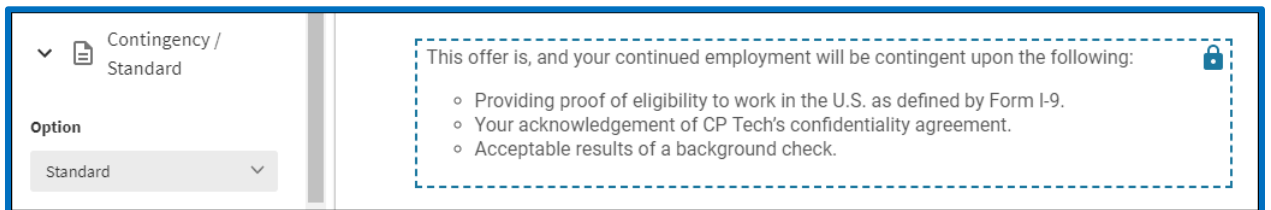
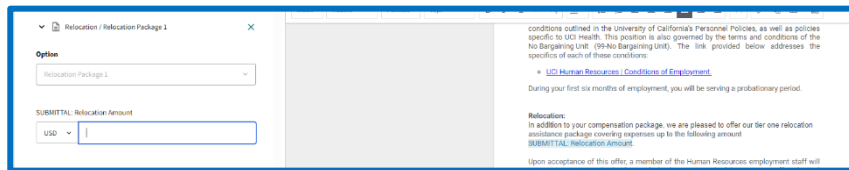


- Review the text, images, and formatting of the populated draft in the **Offer Studio** document editor. Review the sidebar which lists the offer letter's fields, variables and clauses for accuracy and to ensure content is populated:
- The UCI Offer letters have primarily been developed using variables. The difference between fields and variables is that fields have 2-way communication. An update made to a field in the offer letter automatically syncs to the corresponding field in the system profile. For example, an update made to the Offer Amount field in the offer letter is reflected in the associated Recruiting Workflow profile Offer Details tab.
- **Variables**
  - Unresolved variables will display green in the offer letter; action is required.
    - Populate the value in the respective profile field to resolve the variable in the offer letter. When resolved, variables display the populated value in bold black text. An offer letter should not be sent until unresolved variables are populated
  - **Note:** Variables *do not* support two-way sync between Offer Management and Applicant Tracking and are read-only.
  - **Changes Detected:** If the system detects that a profile field value has been changed and no longer matches the value in the offer letter, a Changes Detected alert displays above the offer letter.
- **Fields:**
  - Unresolved fields will display blue in the body of the offer letter, indicating they are unresolved, action is required. Update the value of the field in the sidebar. When resolved, fields display the populated value in black text. An offer letter should not be sent until unresolved fields are populated.
  - If the user updates a field in the offer letter that the user does not have access to in the corresponding profile, this field is updated in the offer letter only; it is not updated in the profile. Only updates made to fields that the user has access to are synced to profiles.
- **Clauses:**
  - Clauses may or may not include variables/fields. A clause's title and option are listed in the sidebar. A clause will be outlined with a perforated blue box when hovering the cursor over the text in the **Offer Studio** document editor. Unresolved clauses will display in the

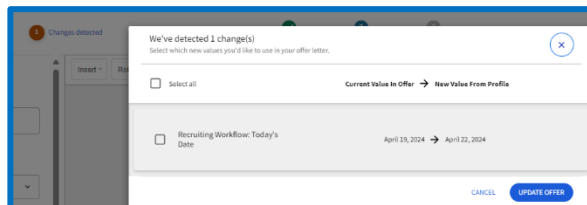
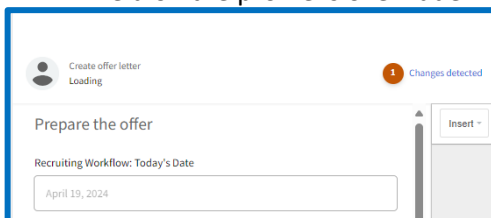
document editor highlighted in blue. Review the offer letter for clauses that must be selected and require action.



- **Action Required:** If only a clause's title displays in the body of the offer letter and the sidebar, indicating an option has not been selected, select a clause option in the sidebar. Once selected, the populated clause option content displays in the body of the offer letter. An offer letter should not be sent if clause options have not been selected in the sidebar.
  - A selectable clause option is editable if a padlock icon does not display within the perforated blue box. A padlock icon indicates that the content of the selected clause option cannot be altered.



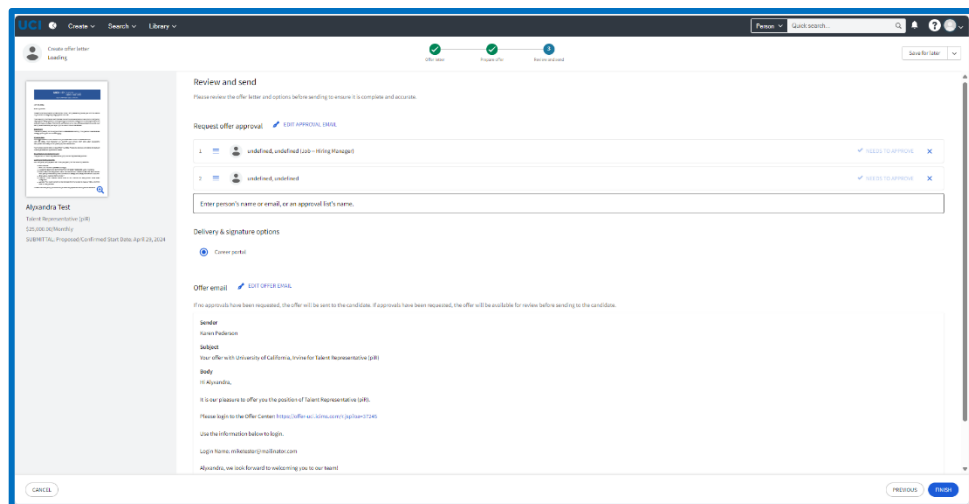
- To add a clause to the offer letter, place the cursor where the clause should display in the body of the offer letter, and in the toolbar, click **Insert**, then **Insert Clause**. An **Insert Clause** popup displays. Search for and select a clause option, then click **Insert Clause**.
- Click the **Changes Detected** alert to launch a popup that lists discrepancies between fields in the profile and the offer letter. Then, take one of the actions below:
  - To **update** the offer letter with the new value from the profile, select the checkbox next to the applicable value and click **Update Offer**.
  - To **not update** the offer letter to the new profile value, click **Cancel** on the popup or disregard the **Changes Detected** alert. When the offer letter is then saved or sent, the field on the profile is overridden with the value from the offer letter.



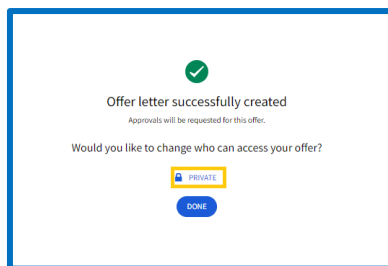
- Click **Next**. The Review and Send page displays.

## Preview the offer

- Click the thumbnail in the left side panel. A popup of the full offer letter displays.
- The preview cannot be directly edited, saved, or printed. Return to the previous page to edit and save as needed.
- If department policy requests that approvals occur for the offer letter, in addition to the Offer Details, add approvers as follows
  - To a specific person, begin typing the name and select once it appears
  - To add the Hiring Manager and their Manager, begin typing Manager Hierarchy and select once it appears
- To arrange approvers in the order in which they should be notified of the offer, click and drag the grip icon.
- To remove an approver from the list, click the **Delete (X)** icon.
- To review and edit the email sent to approvers, click the **Edit Approval Email** button. The Compose Email window displays with the default email template configured for your organization. **Edits** only apply to the email for the specific offer and do not affect the email template or other offers using the same template. A PDF copy of the offer letter draft is attached to approval emails.



- Click **Finish**. A confirmation page displays. The privacy level for the offer letter defaults to Private. If you want to change access, click on the Private icon, make the appropriate selection and press **Apply**.



- Click **Done**.



<b>Version</b>	<b>Author</b>	<b>Date</b>
Version 1.0	Karen Pederson	May 21, 2024