Offers

Revision history

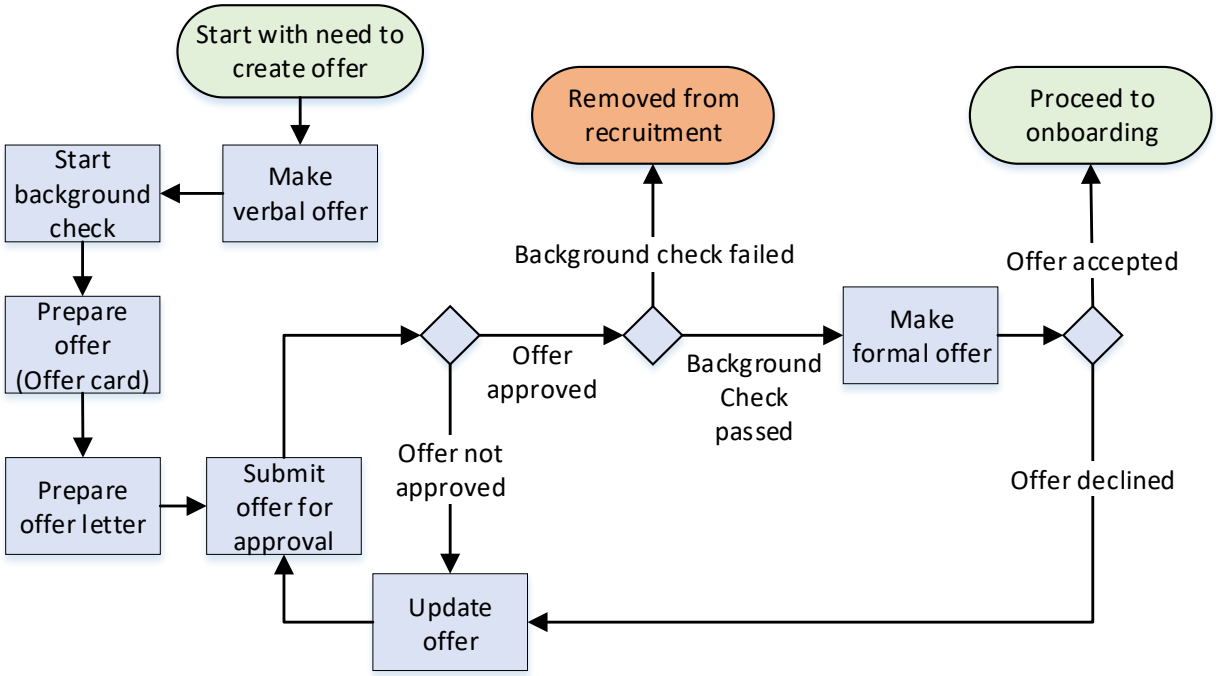
Last modified on	Author	Reason
3/19/2019	CHRS Recruiting Training Team	Initial publication
4/26/19	CHRS Recruiting Training Team	Minor updates, added information on freeing a position
6/7/19	CHRS Recruiting Training Team	Release 7 updates

Introduction

This guide shows you how to work with offers and make offers to selected applicants. Offers require an approval process and fields on the offer are used for PeopleSoft integration.

Process diagram

The following diagram shows a general, high-level offer process. Your campus's process might differ.



- Initially, you might make a verbal or conditional offer to the applicant upon selecting the final candidate.
- Begin the background check using your existing campus processes.
- Prepare the offer by completing the Offer card.
- Prepare the offer letter using merged fields available on the Offer card.
- The offer approval process begins.

    - If it is not approved, you must update and resubmit the offer for approval.
- If approved, and if the applicant passes the background check, then the offer is made to the applicant. If the applicant fails the background check, follow your campus process to notify the applicant.
- If the applicant accepts the offer, proceed to onboarding. Otherwise, the offer can be revised and resubmitted for approval.

What you will do

- Create an offer
- Complete the Offer card
- Prepare the offer letter
- Move application status to “online offer made”
- Revise an offer
- Rescind an offer
- Free a position after a declined offer

Definitions

Term	Definition
Applicant card	The Applicant card is a complete summary of an applicant in the system, including their personal details and application history.
Application status	A single stage of a recruitment process. Campuses pre-determine their recruitment processes based on the type of recruitment. Application status identifies where an applicant is in that process. Example: First Interview Successful.
Job card	The Job card initiates a requisition with specific and relevant details of the job, posting language and requirements, and includes an approval process with notifications and alerts to approvers. With a unique ID to represent each requisition, it facilities central information collection and tracking. The Job card also associates users to the requisition by their roles in the recruitment process, such as the Hiring Manager, HR/FA Representative (Recruiter), Search Committee Chair and other key team members.
Job code	Job code is a four digit number assigned to a specific classification based on CSU Classification Standard. In CHRS Recruiting, it is also referred to as Employee Classification. The field displays the classification title, and the Job No (number) box displays the actual four digit code. Example: 1038
Library	A collection of documents and folders that exist in the CHRS Recruiting system. The library can contain such documents as interview guides, offer letters, and position descriptions.

Term	Definition
Merge field	Merge fields are specific text strings that pull information directly from the system. You can use merge fields to personalize bulk communications. Example: Dear {FIRSTNAME} is shown in the communication preview. When the communication is sent, {FIRSTNAME} is replaced by the value of the applicant's first name.
Offer card	A form that is used for creating the official offer to the selected applicant. The Offer card requires an approval process.
Offer status	The offer status shows the progress of the offer through the offer approval process.
PeopleSoft HCM	PeopleSoft HCM is the Human Resources Management system. CHRS Recruiting is a separate system that ties in to PeopleSoft HCM via integration, so that records in the two systems are consistent.
Position number	An eight-digit number associated with a position that is generated in PeopleSoft HCM. Position numbers are attached to positions when they are imported from PeopleSoft into PageUp. In PageUp, Positions numbers start with a campus two-letter code. Example: FL-00027198. (FL is the campus code for Fullerton.)
Provisioning	A CHRS Recruiting feature that you use to order equipment, access, hardware, and software needed for a new hire. For physical items, provide an address for where the items are to be delivered.

Create an offer

To prepare an offer for approval, you need to do the following tasks:

- Create an offer
- Complete the Offer card
- Select an offer approval process
- Prepare the offer letter

About the Offer card

The Offer card, like the position description and the Job card, is a form that is used across the CSU system, though each campus might hide a different set of fields.

Because new hires must be recorded in the PeopleSoft HCM, information in the CHRS Recruiting system must be synchronized with PeopleSoft.

When you create the offer for the first time, you should open the Offer card by using an application status change. Each campus might use a different recruitment process; however, each should have a status change that opens the Offer card.

After you create the offer, the Offer card is more easily accessed through the Applicant card by clicking the Offer status link.

When to create an offer

Campuses have different processes for when to prepare an offer. The following examples may not apply to all campuses:

- After you have decided on a finalist to offer the job
- After you have made a verbal offer

Prerequisites and assumptions

- You have permission to view applicants.
- You know how to open the Applicant card.
- You have permission to change application statuses.
- You know how to change application statuses.
- You have permission to create and edit offers.

How to create an offer

You access the Offer card through the Offer status link on the Applicant card. However, when you are preparing the offer for the first time, you do this by changing the application status.

1. Open the **Manage applicants** page for the job.

2. Click the status of the applicant.

3. Change the status to **Prepare Offer**. The offer is created with some fields pre-populated with information from the job requisition.

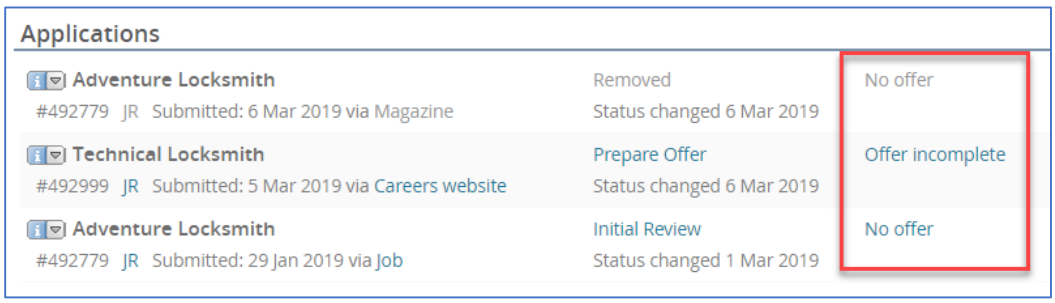
Guidelines

- Your campus might use a different process with a different status name but with the same functionality.
- You can save the offer as a draft if you need to work on it later. The offer status changes from **No Offer** to **Offer Incomplete**.

How to re-open an offer

If you need to continue working on an offer or to update it, you can reopen it by using the following procedure.

1. Open the **Manage applicants** page for the job.
2. Click the applicant's name to open the Applicant card.
3. In the Applications area, click the **Offer status** link.



The Offer card opens.

Guidelines

- The Offer status link is always in the same location on the Applicant card, but the link name changes, depending on the status of the offer.
- An offer status is disabled for applications that are no longer active.

What happens next

You complete the Offer card.

Related documents

Creating an offer

Offer

REC_RG_19_Manage Applications.docx – opening the Applicant card

REC_RG_12_Recruitment Process – changing application statuses

Complete the Offer card

You must complete the Offer card and the offer letter before you can submit the offer for approval.

When to complete the Offer card

You have moved an applicant to **Prepare Offer** status.

Prerequisites and assumptions

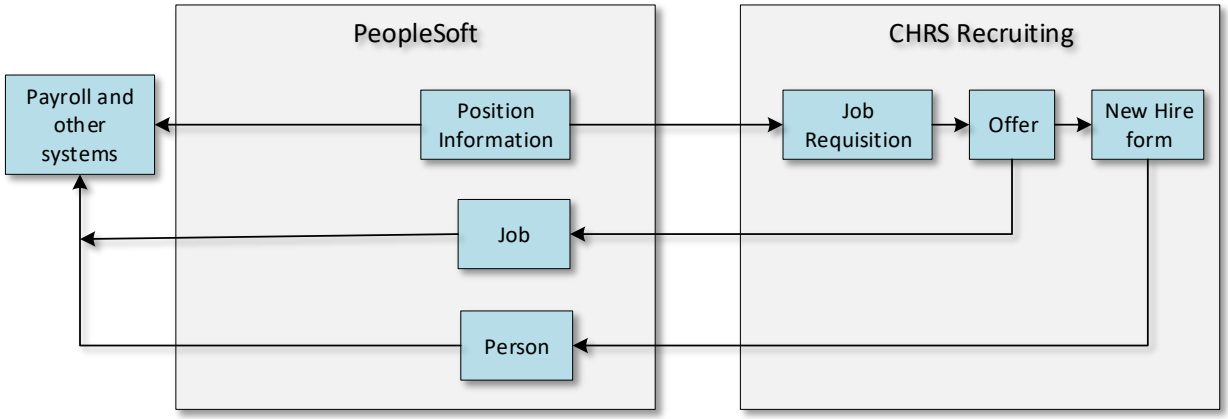
- The applicant has been moved to the **Prepare Offer** status.
- You have permission to create offers.

About the Offer card

CHRS Recruiting system is not part of the PeopleSoft Human Resources system. Although there is some integration, it is necessary for the recruiter to ensure that the information in both systems is synchronized. As you complete the Offer card, you must verify that the information is correct and in sync with the position data in the PeopleSoft system.

PeopleSoft – CHRS Recruiting data flow diagram

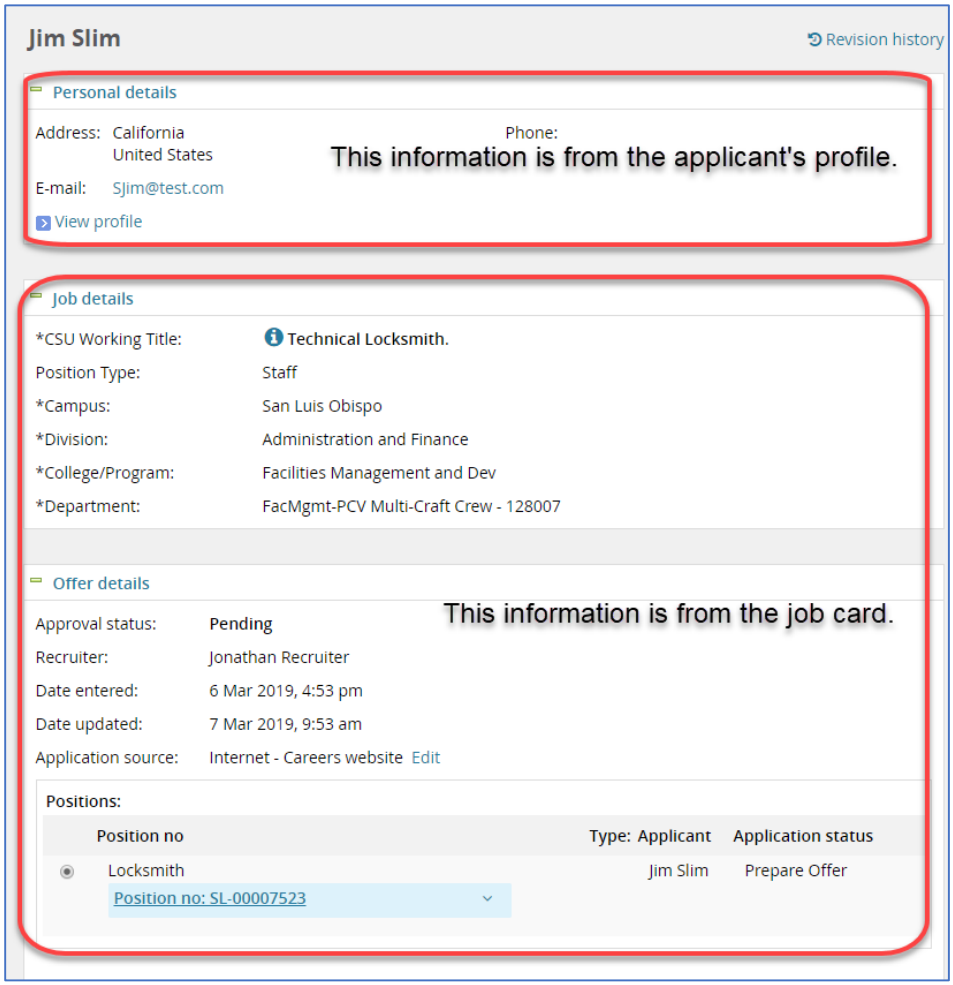
This diagram shows how data is shared between PeopleSoft, CHRS Recruiting, and other systems. It is your responsibility to ensure that the data are consistent across the systems. For example, if the job requisition has changed, you must make sure the change is also made in PeopleSoft Position Management before you submit the offer for approval.



How to complete the Offer card

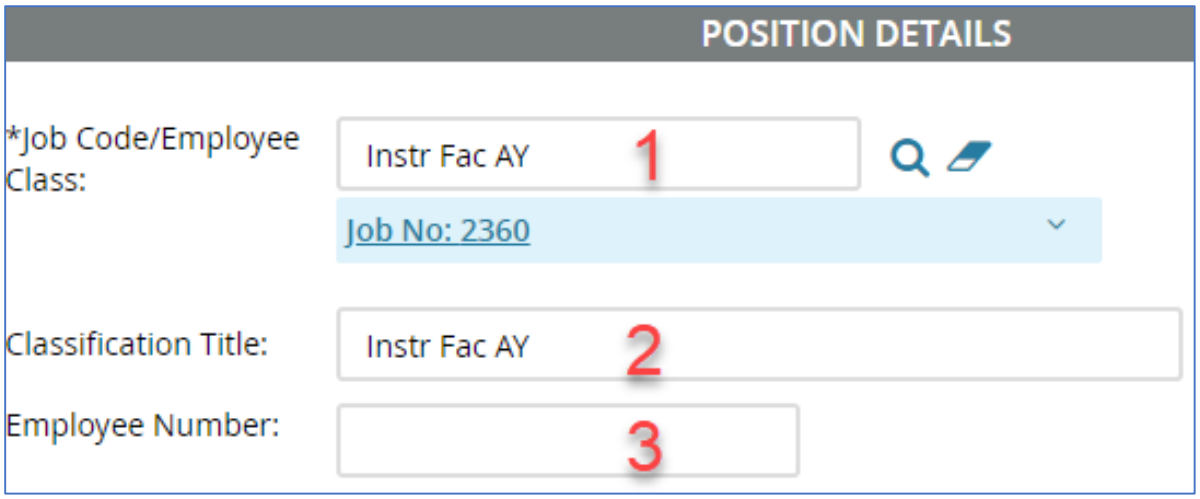
1. Complete the fields on the Offer card by using the following screen captures and data tables.

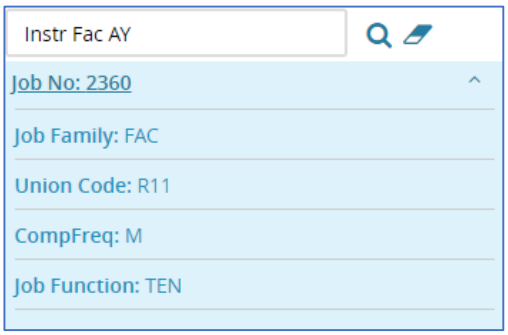
Offer card - Personal, Job, Offer details sections



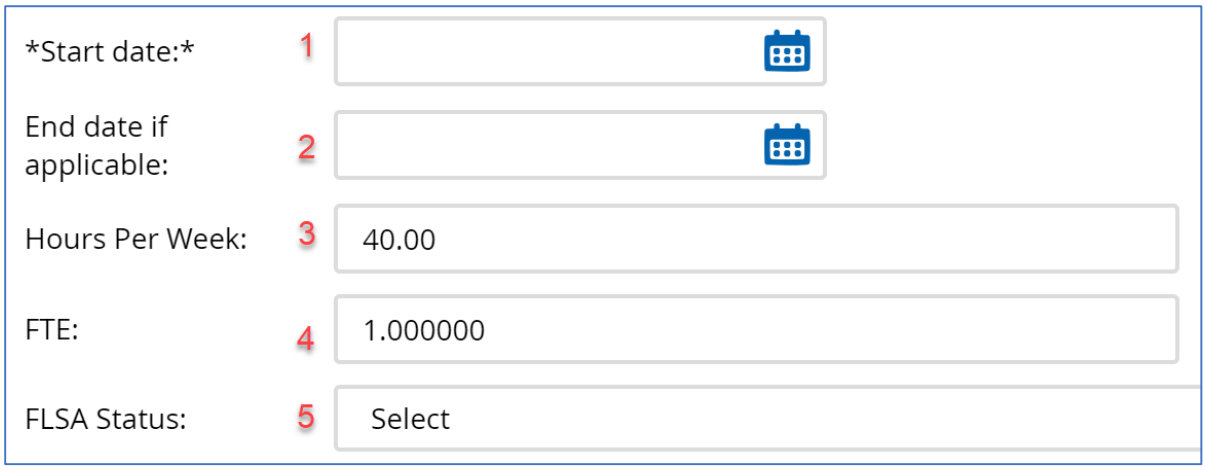
The Personal details, Job details, and Offer details sections are pre-populated. You cannot edit these. The values for these fields is drawn from the Job card and Applicant card.

Offer card – Position Details section 1



#	Field	Information
1	***Job Code/Employee Class**	Specify the job code. You can expand the blue box to view the information about this job code. Job code shows as Job No in the box below the employee classification.  Use your campus processes to ensure that the position number and job number are synchronized between the PeopleSoft and CHRS Recruiting systems.
2	**Classification title**	This field is populated with data from the Job card. It cannot be merged into the offer letter. You must copy the classification title (based on the job number in the blue box or the title from the field above it) and paste it into the offer letter.
3	**Employee Number**	If the applicant is a current employee: • Copy and paste the employee ID from PeopleSoft. • No new hire starter form should be initiated. Otherwise, leave this field blank.

Offer card – Position Details section 2

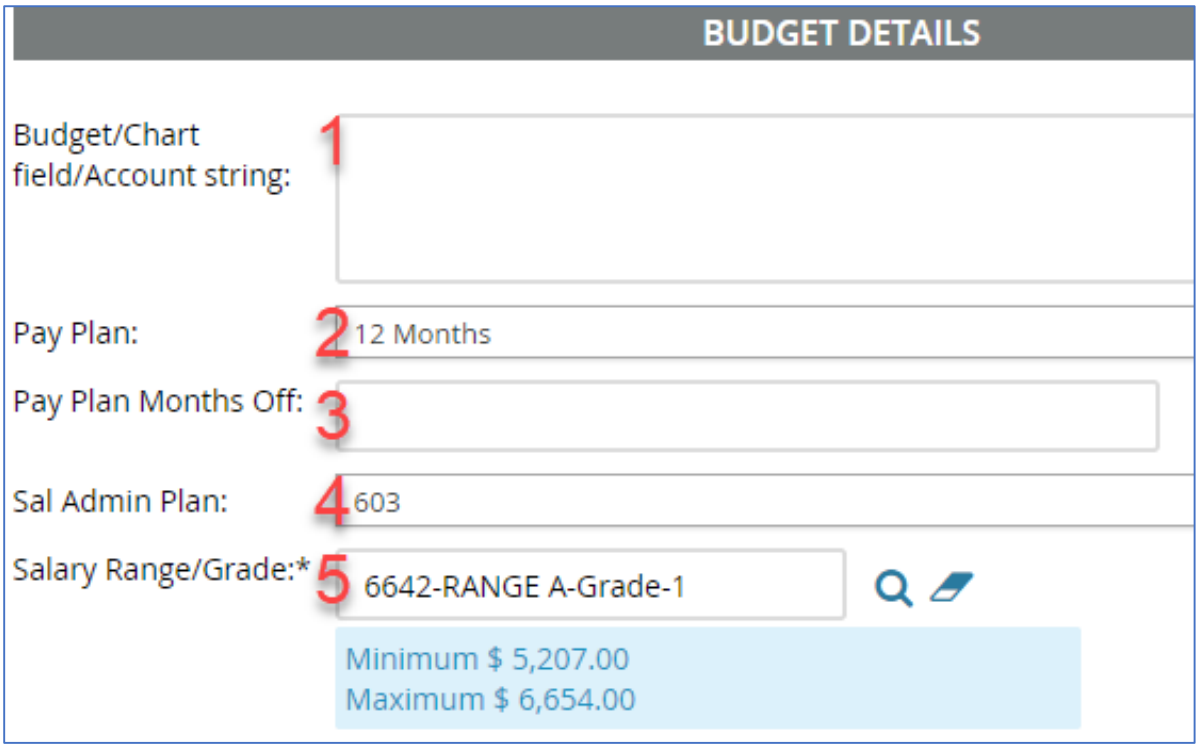


#	Field	Information
1	***Start date:***	Use the calendar to enter the start date. This date drives the new hire onboarding tasks.
2	**End date if applicable:**	Use this field only for temporary employees.
3	**Hours Per Week**	Enter the number of hours per week.
4	**FTE:**	Full-time equivalence: Enter a decimal value from 0 to 1. Example: 20 hours/week is 0.5 FTE. Use campus business process to synchronize this value with PeopleSoft.
5	**FLSA Status:**	Select: Exempt, non-exempt, other Use campus business process to synchronize this value with PeopleSoft.

Offer card – Position Details section 3

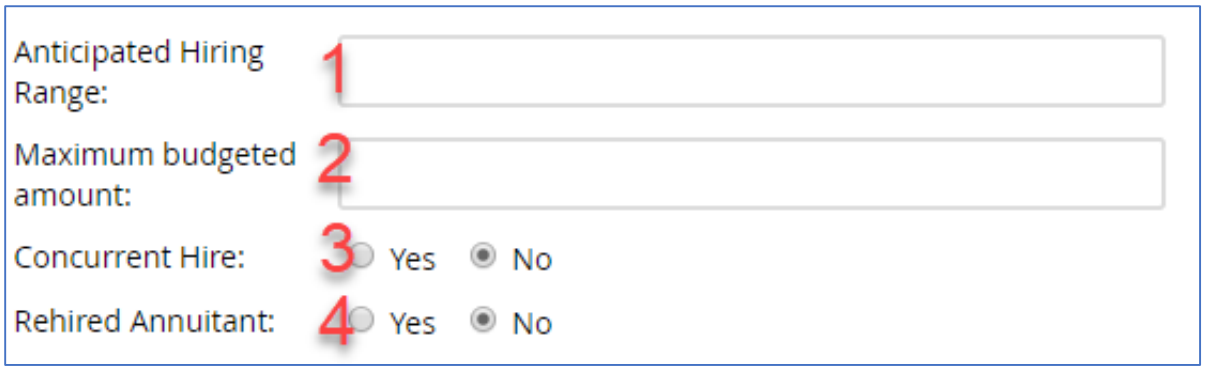
#	Field	Information
1	**Union:**	Select the appropriate union from the list.
2	**Union Language**	Enter the applicable union language. This language comes from system-wide collective bargaining agreement. Each union provided the same language to all campuses to be inserted in the offer letter. This information does not exist in PeopleSoft.
3	**Mandated Reporter**	Select the appropriate mandated reporter from the list: General, Limited, and None.
4	**NCAA:**	If Yes, then campuses would need to provide language in offer letters via Offer Template for applicable NCAA appointments.
5	**Sensitive Position**	This information is used in determining the appropriate type of background checks and new hire trainings. This language is merged into the offer letter. Use campus business process to synchronize this value with PeopleSoft.
6	**Conflict of Interest**	Designates whether the applicant must complete a Conflict of Interests form and attend training. This language is merged into the offer letter. Use campus business process to synchronize this value with PeopleSoft.

Offer card – Budget Details section 1



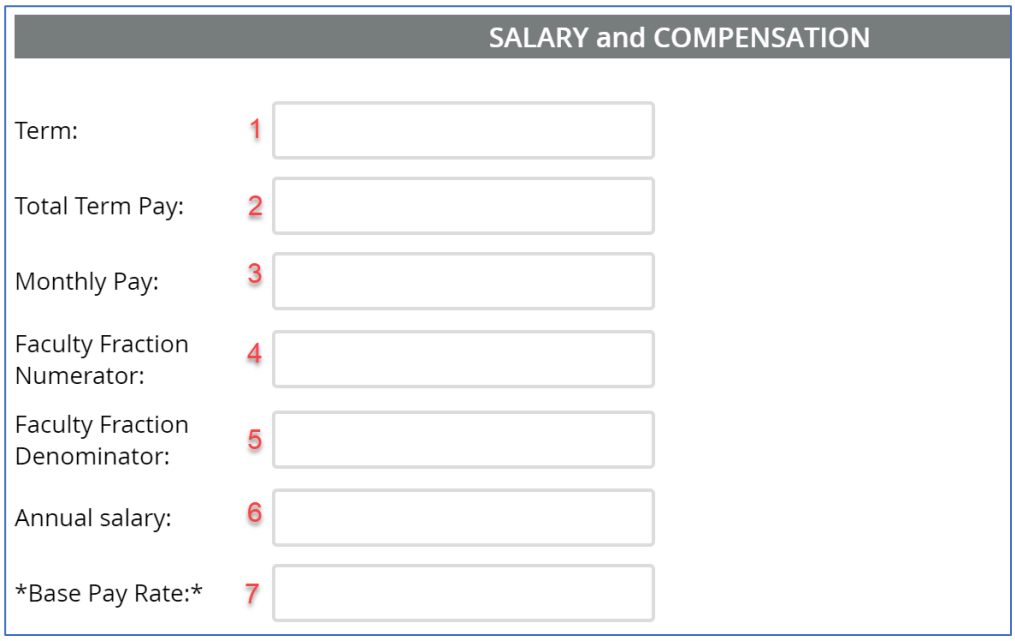
#	Field	Information
1	**Budget/Chart field/ Account String**	Enter chart string information including the Department, Fund, Program or Project, Class and % Distribution.
2	**Pay Plan:**	Select the applicable Pay Plan. Example: 12/12 months. This information can be merged into the offer letter.
3	**Pay Plan Months Off:**	If the Pay Plan field value is anything other than 12/12 months, you must specify which months are off. This information is merged into the offer letter.
4	**Sal Admin Plan:**	The value for this field is automatically populated from the Position ID.
5	**Salary Range/Grade:***	The values for this field are filled from the Position ID. The range selection is determined by the system- wide classification standards.

Offer card – Budget Details section 2



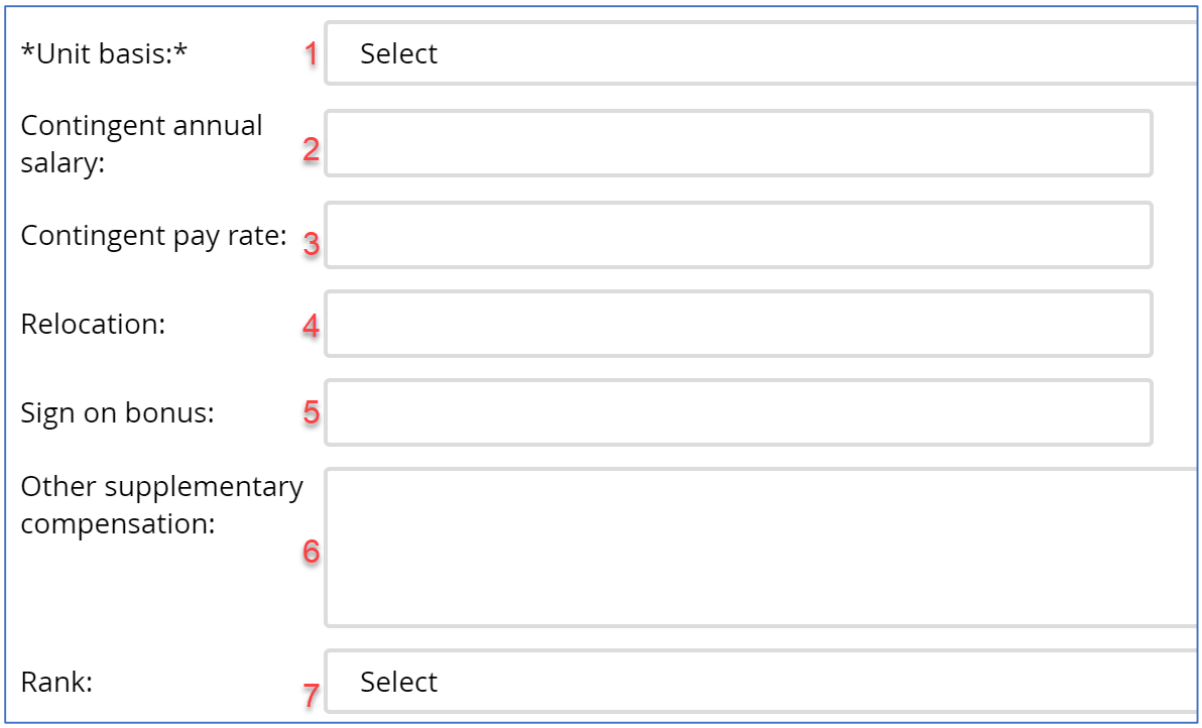
#	Field	Information
1	**Anticipated Hiring Range:**	Use this field to specify the campus-specific hiring salary range. This is usually used by the Budget Office to determine if the offer can be approved or not.
2	**Maximum budgeted amount:**	Enter the maximum budgeted amount.
3	**Concurrent Hire:**	Select **Yes** if the applicant is a current employee who is going to be working both positions concurrently. A campus expert needs to provide training on how to identify this type of applicant.
4	**Rehired Annuitant:**	Select **Yes** if the applicant is a retired employee who is working part-time. A campus expert needs to provide training on how to identify this type of applicant.

Offer card – Salary and compensation section 1



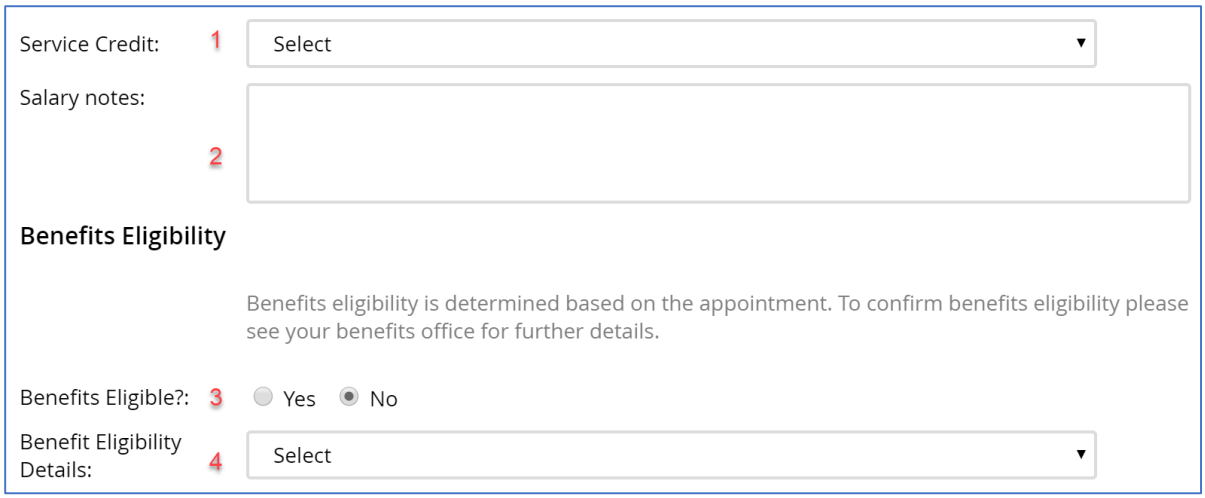
#	Field	Information
1	**Term:**	This field is used for temporary faculty only. Term should match the campus term code used in PeopleSoft HCM representing the term the new hire will be teaching. The field can be merged into the offer letter.
2	**Total Term Pay:**	This field is used for temporary faculty only. The field can be merged into the offer letter.
3	**Monthly Pay:**	This field is used for temporary faculty only. This field is to explain the difference in pay for total term and by month. The field can be merged into the offer letter.
4	**Faculty Fraction Numerator**	This field is used for temporary faculty only. This field and the field below work together to define the time base of the faculty. It is a PeopleSoft field that will be used in integration. The field can be merged into the offer letter.
5	**Faculty Fraction Denominator:**	This field is used for temporary faculty only. This field and the field above work together to define the time base of the faculty. It is a PeopleSoft field that will be used in integration. The field can be merged into the offer letter.
6	**Annual salary:**	This field is used for all types of employees by some campuses. Regardless of whether this field is completed, the Base Pay Rate and Unit Basis are required. You might have to calculate to derive the values for this field. The field can be merged into the offer letter.
7	***Base Pay Rate:***	This field is required for all hires. This field works with the "Unit Basis" field to provide the salary information for the new hire. Both fields will be integrated with PeopleSoft.

Offer card – Salary and Compensation section 2



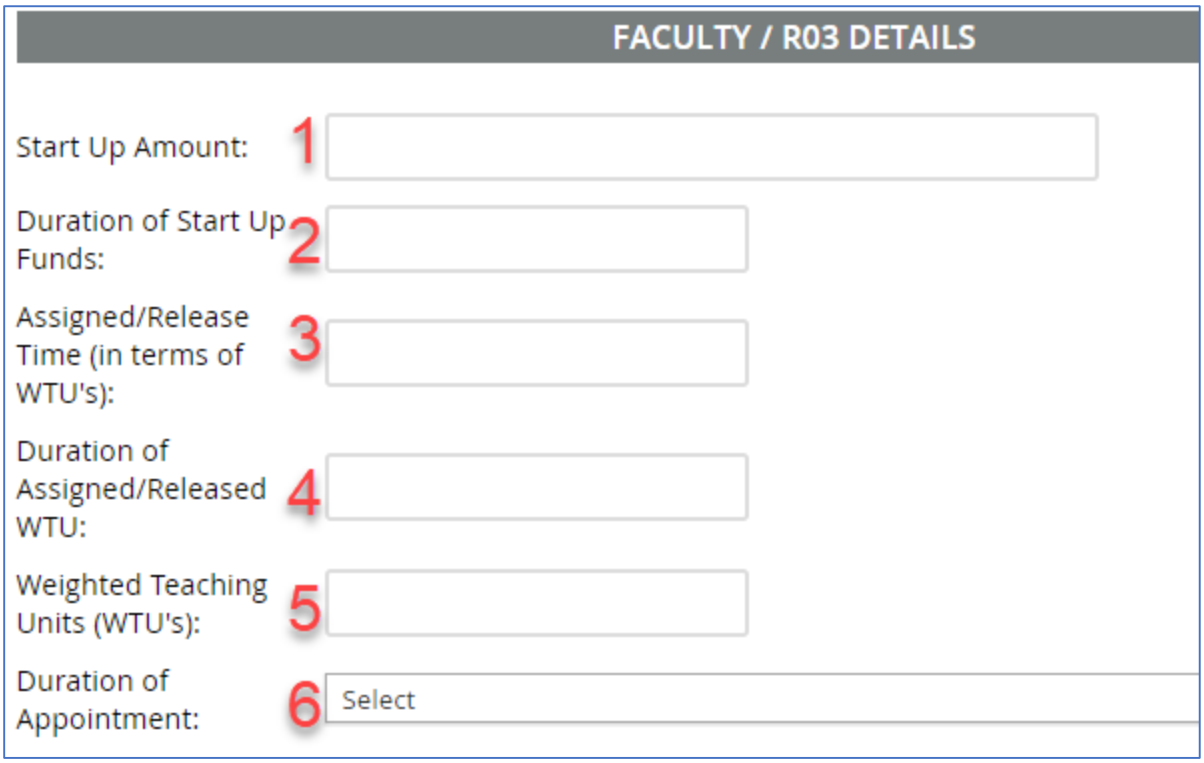
#	Field	Information
1	***Unit basis:***	This field is required for all hires. The field can be merged into the offer letter. Used in integration. Select the unit by which to base pay on. Examples: Lump Sum, Annual, Hourly, Number of students.
2	**Contingent annual salary:**	Faculty hire field. The field can be merged into the offer letter.
3	**Contingent pay rate:**	Faculty hire field. The field can be merged into the offer letter.
4	**Relocation:**	Faculty hire field. Sometimes also used for staff. The field can be merged into the offer letter.
5	**Sign on bonus:**	Faculty hire field. Sometimes also used for staff. The field can be merged into the offer letter.
6	**Other supplementary compensation:**	This field is to be used to record any supplemental compensation. The field can be merged into the offer letter.
7	**Rank:**	Faculty hire field. The field can be merged into the offer letter. Select Assistant, Associate or Professor.

Offer card – Salary and Compensation section 3



#	Field	Information
1	**Service Credit:**	Faculty hire field to record how service credit would be calculated for certain type of new hire. The field can be merged into the offer letter.
2	**Salary notes:**	Free text field designed to record any salary related information. It can be merged into the offer letter.
3	**Benefits Eligible?**	Select Yes or No. The field is merged into the offer letter.
4	**Benefit Eligibility Details:**	Select: Full Benefits, Health Only (ACA), Partial Benefits. The field is merged into the offer letter.

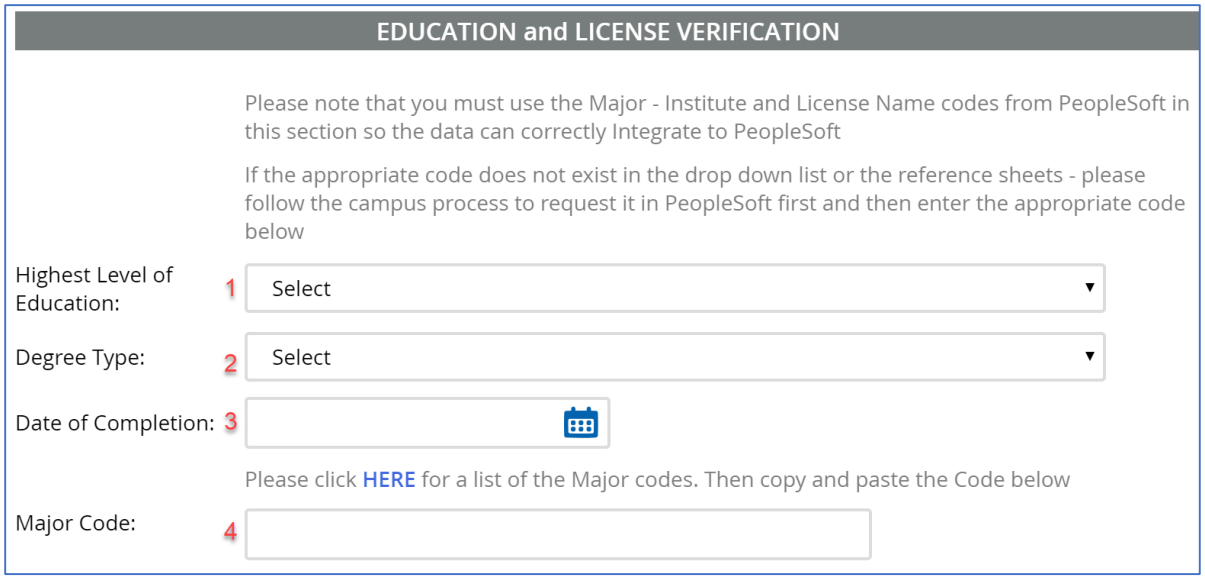
Offer card – Faculty / R03 Details section



#	Field	Information
1	**Start Up Amount:**	Field used specifically for faculty hires. It can be merged into the offer letter. Data is also used for reporting.
2	**Duration of Start Up Funds:**	Field used specifically for faculty hires. It can be merged into the offer letter. Data is also used for reporting.
3	**Assigned/Release Time (in terms of WTU's):**	Field used specifically for faculty hires. It can be merged into the offer letter. Data is also used for reporting.
4	**Duration of Assigned/Released WTU:**	Field used specifically for faculty hires. It can be merged into the offer letter. Data is also used for reporting.
5	**Weighted Teaching Units (WTU's):**	Field used specifically for faculty hires. It can be merged into the offer letter. Data is also used for reporting. This field is also used in integration with PeopleSoft.
6	**Duration of Appointment:**	Field is required for lecturer hires. Select: Quarter, Semester, or Year. Integrated into PeopleSoft.

Offer card – Education and License Verification section 1

Follow your campus's background check process to verify the education and license for the new hire.



#	Field	Information
1	**Highest Level of Education:**	If the job requires a degree, you must complete this field. This field is integrated with PeopleSoft.
2	**Degree Type:**	If the job requires a degree, you must complete this field. This field is integrated with PeopleSoft.
3	**Date of Completion:**	If the job requires a degree, you must complete this field. This field is integrated with PeopleSoft.
4	**Major Code:**	If the job requires a degree, you must complete this field. This field is integrated with PeopleSoft. Click the **HERE** link to download a list of Major codes. The spreadsheet includes codes and descriptions. Copy and paste the CODE value only. If the code is not in your campus's PeopleSoft instance, contact your campus administrator to request CO Standardization Team to add it into PeopleSoft across the system. PS Code / Major Description 10 ANA Board Certificate 20 Accounting 25 Administration 30 Adult Education

Offer card – Education and License Verification section 2

Institute Code: 1

License/Certification

Please click **HERE** for a list of the License/Certificate Name. Then copy and paste the code below

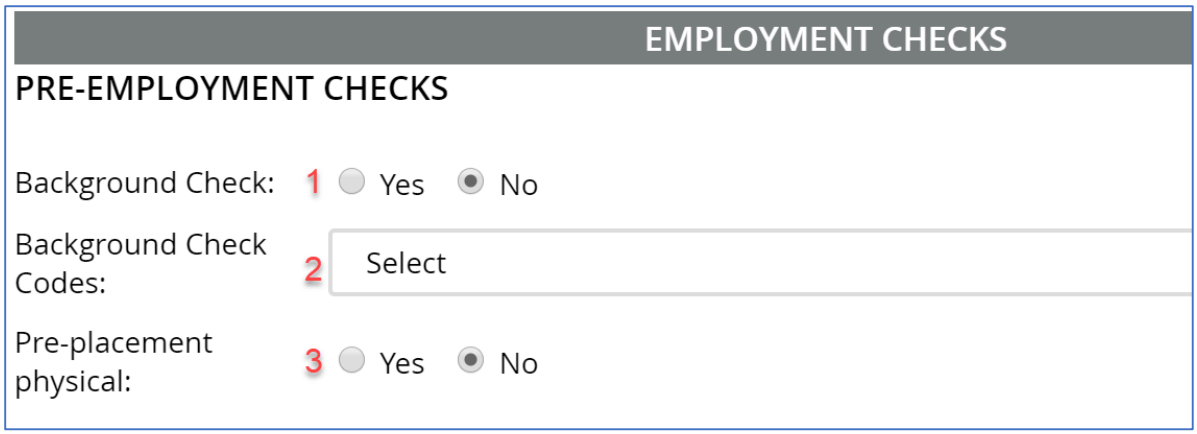
License/Certification Name: 2

License/Certification Number: 3

License/Certification Expiry Date: 4

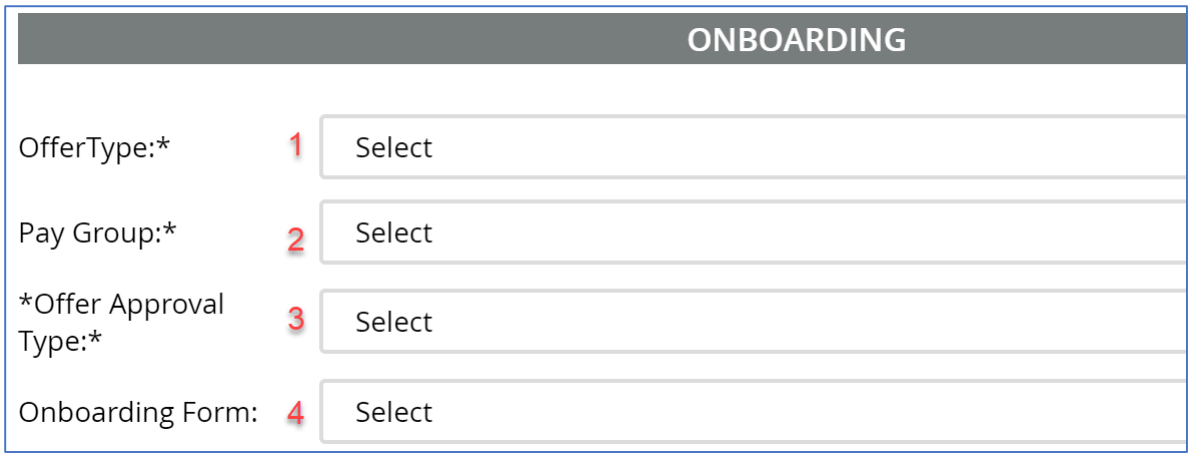
#	Field	Information
1	**Institute Code:**	If the job requires a degree, you must complete this field. This field is integrated with PeopleSoft. Click the **HERE** link to download a list of Institute Codes. The spreadsheet includes codes and institute names. Copy and paste the CODE value only. If the code is not in your campus' PeopleSoft instance, contact your campus administrator to request CO Standardization Team to add it into PeopleSoft across the system. <table><tr><th>PS Institute Cd</th><th>Institute Name</th></tr><tr><td>001169</td><td>Claremont Graduate School</td></tr><tr><td>002780</td><td>New School For Social Research</td></tr><tr><td>014653</td><td>Pennsylvania Acad of Fine Arts</td></tr></table>
2	**License/Certification Name:**	If the job requires a specific license, you must complete this field. This field is integrated with PeopleSoft. Click the **HERE** link to download a list of License names. The spreadsheet includes codes and license names. Copy and paste the CODE value only. If the code is not in your campus' PeopleSoft instance, contact your campus administrator to request CO Standardization Team to add it into PeopleSoft across the system.
3	**License/Certification Number:**	If the job requires a license, you must complete this field. This field is integrated with PeopleSoft.
4	**License/Certification Expiry Date:**	If the job requires a license, you must complete this field. This field is integrated with PeopleSoft.

Offer card – Employment checks section



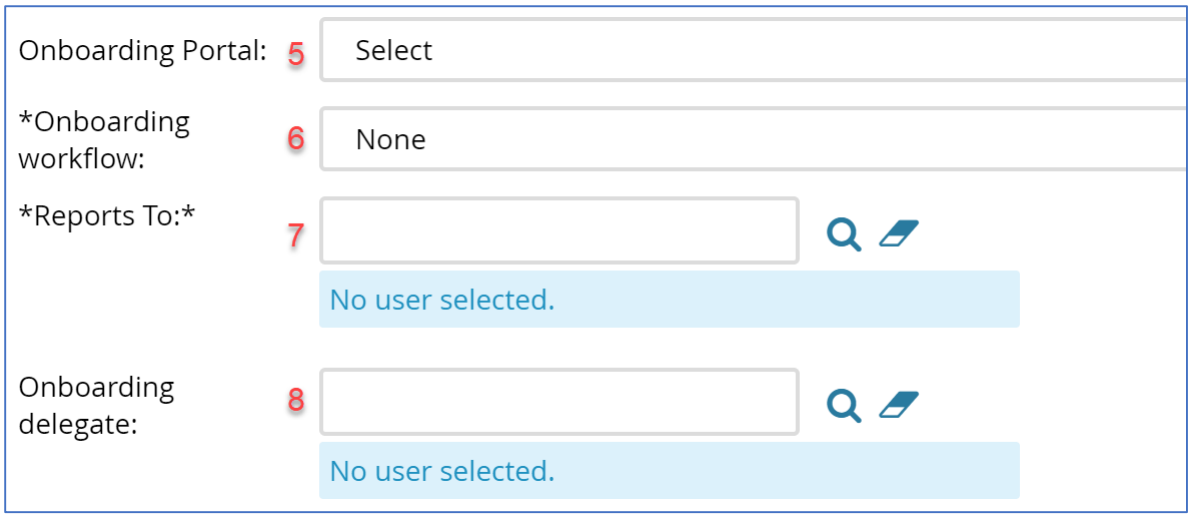
#	Field	Information
1	**Background Check:**	Select Yes if a background check is required.
2	**Background Check Codes:**	Select the type of background check from the list. Please note this list matches the values from the PeopleSoft Security Clearance area. Please ensure that the two systems are in sync. Upon completion of the background check, data should be directly keyed into PeopleSoft.
3	**Pre-placement physical:**	Select Yes if the job requires a pre-placement physical. Use your campus process to schedule the physical.

Offer card – Onboarding section 1



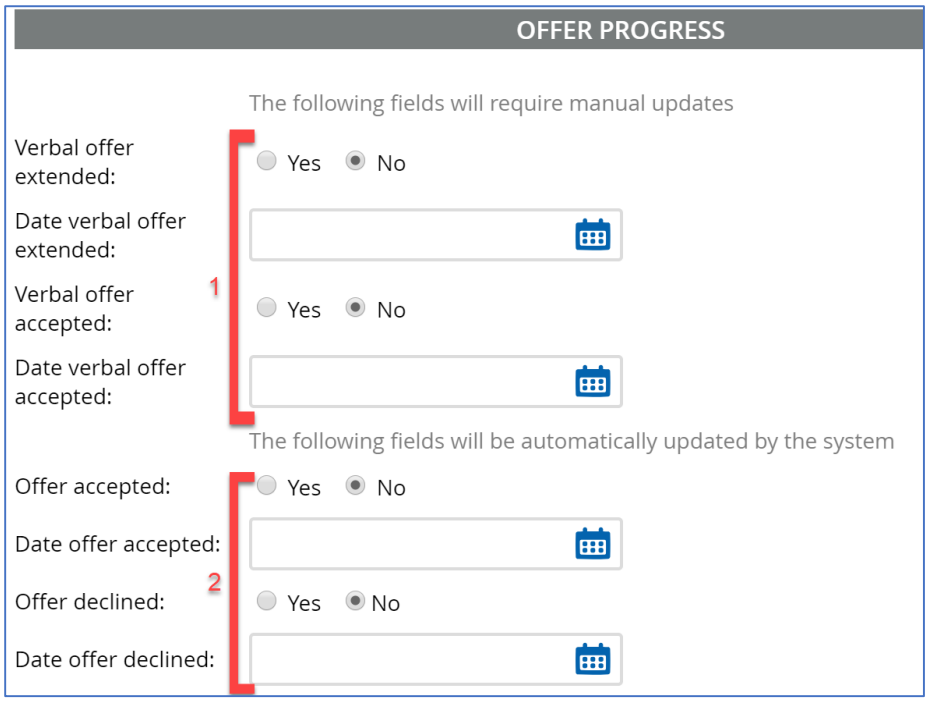
#	Field	Information
1	**OfferType***	Select from the list: Temp to perm, Hire, Transfer, and so on. This field integrates with PeopleSoft Job Data, Action/Reason field.
2	**Pay Group***	Select from the list: Academic Calendar, Master Payroll, Positive Pay, and Student Payroll. This field integrates with the PeopleSoft Payroll, Pay Group field.
3	***Offer Approval Type***	This field determines the Offer Approval Process used to approve the offer card. Select the appropriate option from the list.
4	**Onboarding Form**	This field refers to the New Hire Starter Form. This is a shared form across the system. If an employee ID is completed at the earlier part of the form, this field should be blank. Otherwise, select the “Base New Hire Information Form.”

Offer card – Onboarding section 2



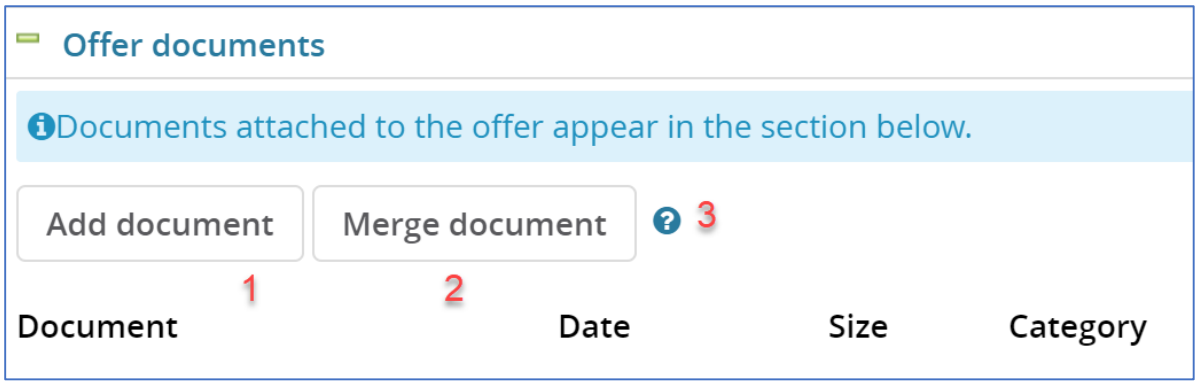
#	Field	Information
5	**Onboarding Portal**	Directs to the New Employee portal to complete onboarding tasks, including onboarding forms. Select the appropriate onboarding portal.
6	***Onboarding workflow**	Determines the onboarding tasks to be completed by the new employee and the manager. Select the appropriate onboarding workflow.
7	***Reports To***	This person gets notification of offer acceptance and onboarding task progress. Enter or search for the appropriate user.
8	**Onboarding delegate**	Back-up for the Reports To person who can perform the same onboarding tasks if necessary. Enter or search for the appropriate user.

Offer card – Offer Progress section



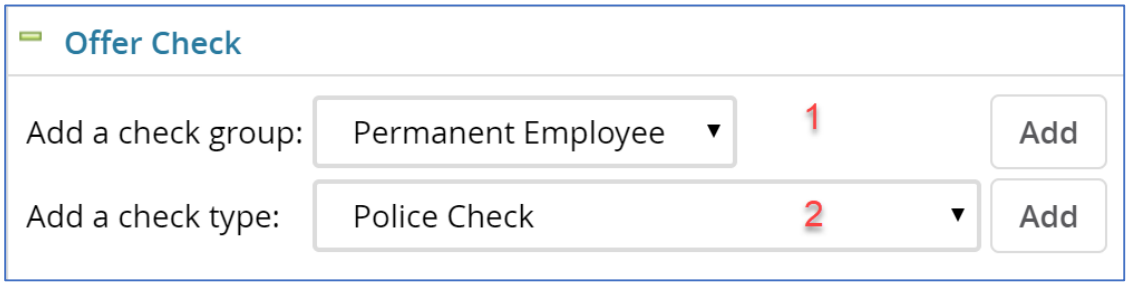
#	Field	Information
1	**Verbal offer extended:** **Date verbal offer extended:** **Verbal offer accepted:** **Date verbal offer accepted:**	Optional, unless your campus needs to record this data. Used only for reporting. These fields must be updated manually.
2	**Offer accepted:** **Date offer accepted:** **Offer declined:** **Date offer declined:**	Optional, unless your campus needs to record this data. Updated when applicant accepts or rejects the offer. Used for reporting. These fields must be updated manually.

Offer card – Offer documents section



#	Button	Information
1	**Add document**	Add documents to the offer. • Faculty positions must include an offer letter. • Non-faculty positions must include a position description and an offer letter. Use your campus process to include the position description.
2	**Merge document**	Merge fields into the offer letter. For complete instructions go to Prepare the Offer Letter.
3	**Question mark icon**	Opens the Merge Document Help, showing offer document merge field information.

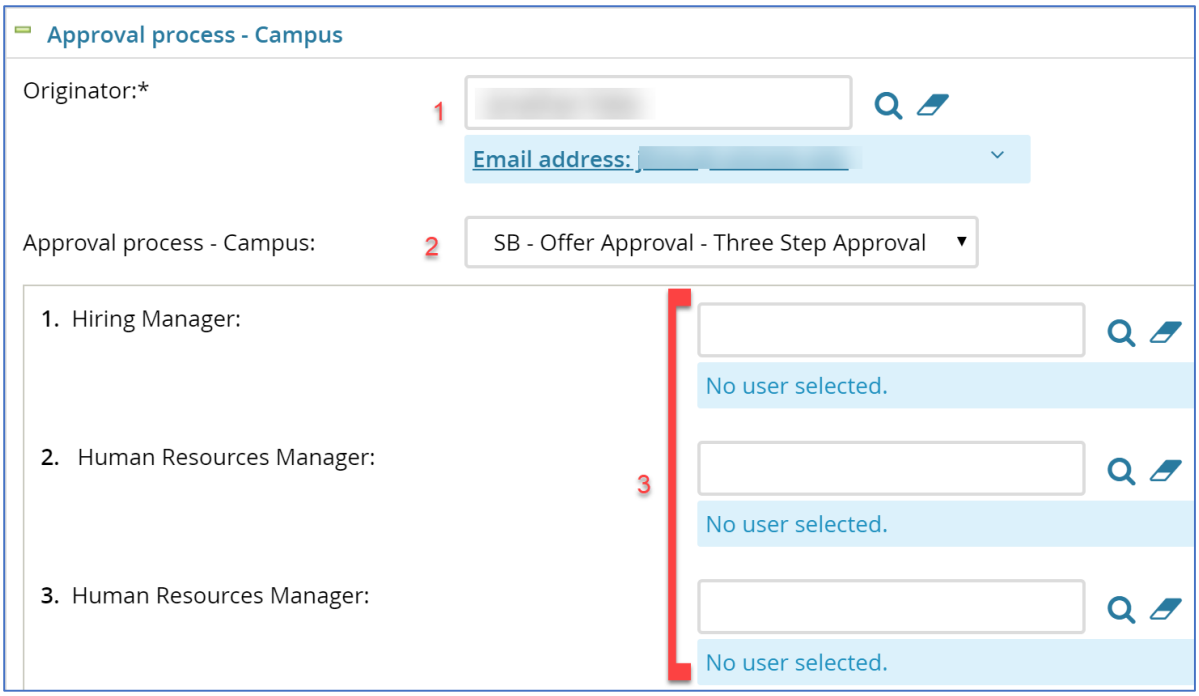
Offer card – Offer Check section



Note: This section can be hidden by your campus administrators.

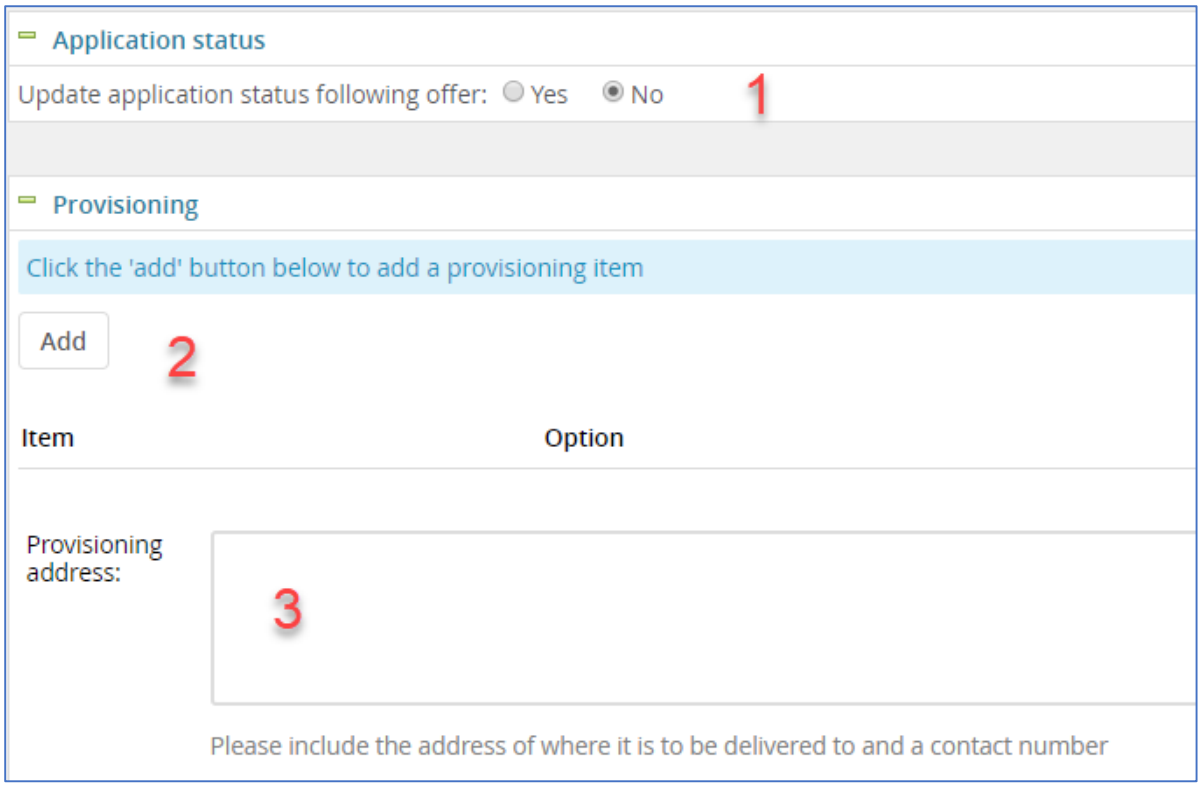
#	Field	Information
1	**Add a check group**	This is a group of checks that need to be completed for a particular type of offer. They are intended to speed up the offer check setting process. For example, every time you hire an engineer, they may need to complete a medical, police and license check.
2	**Add a check type**	For every check type that you add, you can determine if the check shows the start date, completion date and person allocated to.

Offer card – Approval Process section



#	Field	Information
1	**Originator**	This field shows the originator of the offer. Change this field only if you are changing ownership of the offer process.
2	**Approval process**	Select the applicable approval process if the process is not already selected. If no approval process is available, ensure that the *Offer Approval Type:* field in the Onboarding section is complete.
3	**Approvers**	Specify the approvers in the approval process. Your approval process might have more or fewer steps.

Offer card – Application status and Provisioning section



Note: this section might be hidden by your campus administrators.

#	Field	Information
1	**Update application status following offer**	If you select Yes, then the application status is automatically changed when you submit the offer. The status change can trigger a communication to the applicant, which you will need to review or edit.
2	**Add provisioning items**	Provisioning items are items that need to be delivered to the new hire, such as laptops, passwords, badges, and so on. Click **Add** to add provisioning items. A new window opens from which you can specify items to add.
3	**Provisioning address**	You must provide an address where provisioning materials are to be delivered.

What happens next

- You prepare the offer letter.
- You submit the offer.
- The offer approval process begins.
- Optionally, the application status changes, and you edit the outgoing message to the applicant.

Related documents

Creating an offer

Offer

Offer approvals

Offer and onboarding forms

Provisioning

Prepare the offer letter

The offer letter is sent to the applicant and provides details about the offer. These details are provided by merged fields that draw information from the Applicant card, Job card, and Offer card.

When to create the offer letter

- Before submitting the offer for approval.
- After verbal offer is made.

Prerequisites and assumptions

- You have permission to view applicants.
- You know how to open the Offer card.
- You have permission to create and edit offers.

How to create the offer letter

Before you merge fields, ensure that all mandatory fields on the offer form are complete.

1. Open the Offer card.
2. Scroll down to the **Offer Documents** section.
3. Optionally, click the question mark to view merge field help.
4. Click **Merge document**.
5. Click **OK** to save the document, when prompted.
6. Select your campus template by checking its check box. You can optionally view the document by clicking the **View** link.
7. Click **Merge**. The fields are merged into the offer letter. The offer letter is added to the offer.
   a. If you receive a message about missing merge information, you can choose whether to Ignore or Retry.
      i. Retry: the system reattempts to merge the fields.
      ii. Ignore: the system does not attempt to merge the fields. You must correct the errors before sending the offer.
8. Save and close the Offer card.

Merge field troubleshooting

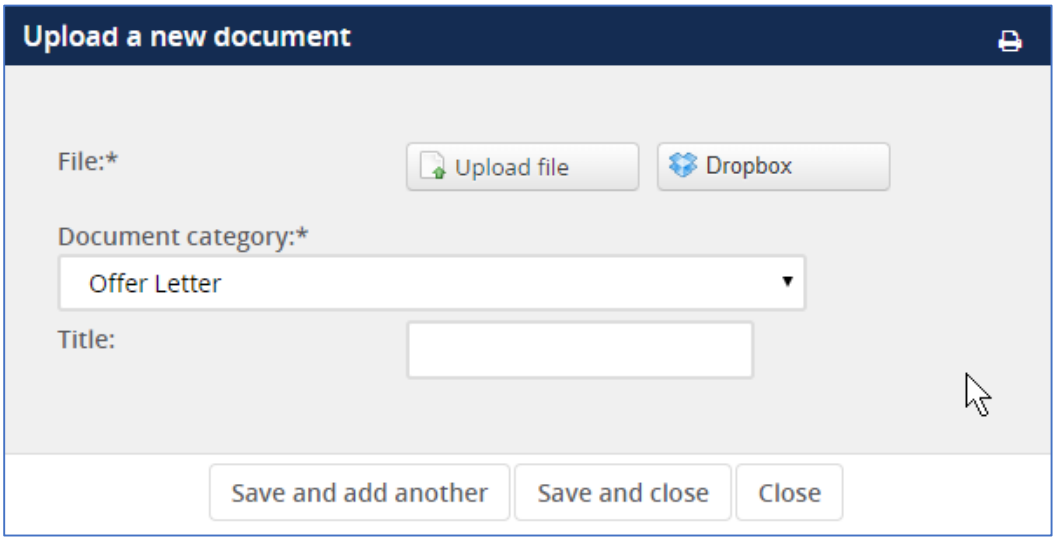
If you receive merge field errors, use the following guidelines to resolve them:

- Field errors can be caused by missing information on the Offer card. Be sure that all the fields on the Offer card are completed.
- Field errors can be caused by merge field errors in the document template.
  - Review the template.
  - Copy/paste the merge field into a plaintext file to remove unseen formatting, and then paste the field codes back into the template.
  - Save the template and then try again.

How to update the offer letter

You should review the offer letter before you send it out. Sometimes, the offer letter contains boilerplate text that was not updated. Sometimes, the offer letter needs additional clarification.

1. Open the Offer card.
2. Scroll down to the **Offer Documents** section.
3. Click **View** to view the document. The document is downloaded to your workstation.
4. Open the document in a document editor to make updates.
5. Delete the original, unedited version of the document from the offer (to avoid duplicates).
6. Add the updated document in to the offer:
    a. On the Offer card, in the **Offer Documents** section, click **Add Document**.



    b. Select Offer letter from the Document category list.
    c. Click **Upload file**.
    d. Select the file to upload.
    e. Click **Save and close**.

How to add the position description to the offer

For some jobs, the position description must be included with the offer.

1. Open the Offer card.
2. Scroll down to the **Offer Documents** section.
3. Click **Add Document**. The **Upload a new document** window opens.
4. From the Document category:* field, select **Position Description**.
5. Click **Upload file**.
6. Select the file to upload.
7. Click **Save and close**.

Guidelines

- You can add other documents to the offer besides the offer letter and position description, such as the cover letter.
- Always review the document before you send it to the applicant.

What happens next

- The document is saved with the offer.
- After the offer is approved, you can send the documents to the applicant.

Related documents

Offer

Offer letters

Move application status to Online offer made

After the offer is approved, you change the application status to **Online offer made**. This application status change makes the offer document available on the applicant portal. The applicant can go to the applicant web portal to view and accept the offer.

This status change is also used for reporting.

When to move the application status to online offer made

Move the applicant status to **Online offer made** when you extend the offer to the applicant.

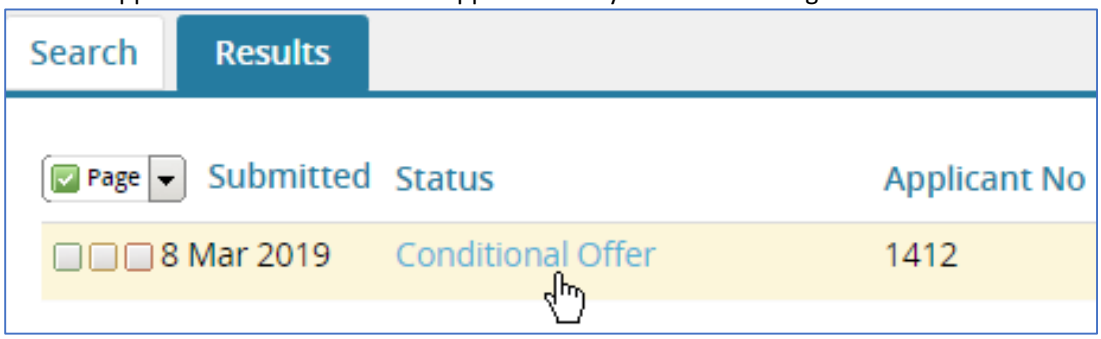
Prerequisites and assumptions

- The offer is complete and approved.
- All offer documents are ready to be sent.
- The background check is complete and successful.

How to move the application status to Online offer made

You can change the application status directly from the Applicant card or Manage applications page, or you can change the status from the Offer card.

1. Open the **Manage applications** page.
2. Click the application status link for the applicant that you want to change.



3. Click **Online offer made**.
4. Click **Next**.
5. Review and edit the outgoing communication.
6. Click **Move now**.

What happens next

- The job status changes to **Offer**.
- The application status changes to **Online offer made**.
- The applicant is notified of the offer.
- The offer is made available at the applicant portal.
- The applicant can access the offer from the applicant web portal.

Related documents

Offer

REC_RG_12_Recruitment Process – changing application statuses

Revise an offer

If the applicant wants to renegotiate the offer, or if other changes are required, the offer must be revised.

Revising the offer requires two application status changes for recording purposes and to trigger the actions needed for the revision.

When to revise an offer

After the offer is made, there is a need to make changes to the offer.

Prerequisites and assumptions

- You have permission to update the offer.
- You have permission to change application status.
- You have permission to update application status.
- You know how to prepare an offer.
- You know how to change application status.

How to Revise an offer

1. Set the application status to **Revised offer**.
2. Renegotiate the offer with the applicant.
3. Set the application status to **Prepare offer**.
4. Update the offer and offer letter.
5. Resubmit the offer for approval.

What happens next

The new offer is approved or rejected.

Related documents

Offer

Offer letters

REC_RG_12_Recruitment Process – changing application statuses

Rescind an offer

You might need to rescind an offer in the following situations:

- You made multiple offers to an applicant for multiple positions, and accepting one position cancels the offer for the other.
- You made an offer by mistake.

When to rescind an offer

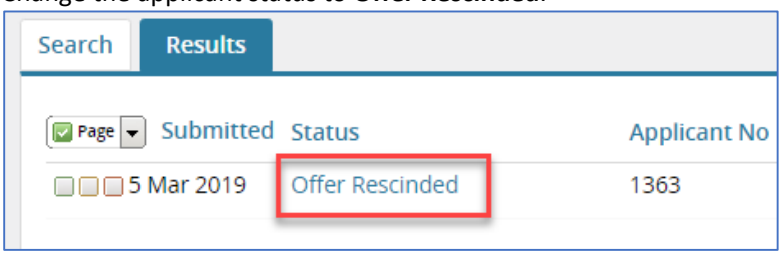
- When you need to remove the offer and all records of it from the system.
- Before the offer is accepted.

Prerequisites and assumptions

- The offer has not been accepted by the applicant.
- You know how to change application statuses.

How to rescind an offer

1. Open the **Manage applications** page.
2. Change the applicant status to **Offer Rescinded**.



3. Click **Next**.
4. Optionally edit the email to the applicant, if applicable.
5. Click **Move now**.

What happens next

- The offer is rescinded.
- The applicant status shows **Offer Rescinded**.
- The Offer status on the applicant card is greyed.

Guidelines

Do **not** use the Remove Offer button at the bottom of the Offer card. Removing the offer deletes the audit trail.

Related documents

Offer

REC_RG_12_Recruitment Process – changing application statuses

Free a position after a declined offer

If you attempt to make an offer to an applicant after another applicant has already declined the offer, you see a message indicating that no positions are available.

Only administrators can remove the offer. Removing the offer also removes all records of the offer.

You need to be able to free up the position so that you can make an offer to another applicant without removing the offer.

To do this, you can:

- Free the position
- Create another position

When to free a position

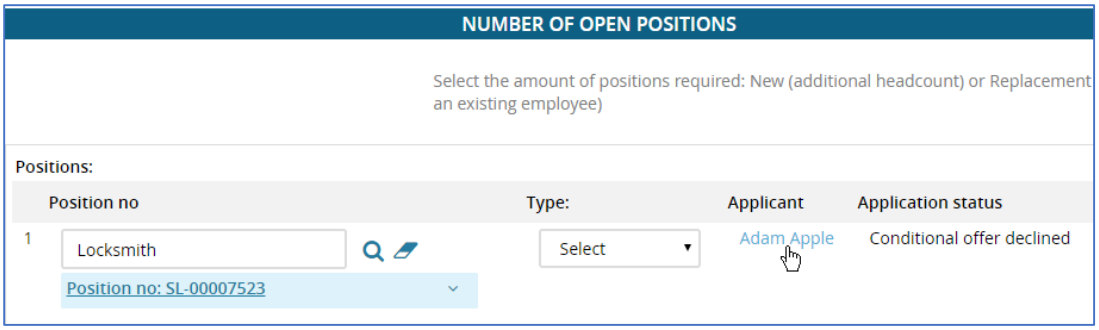
- You have made an offer to an applicant, who has declined the offer.
- You want to make an offer to another applicant.

Prerequisites and assumptions

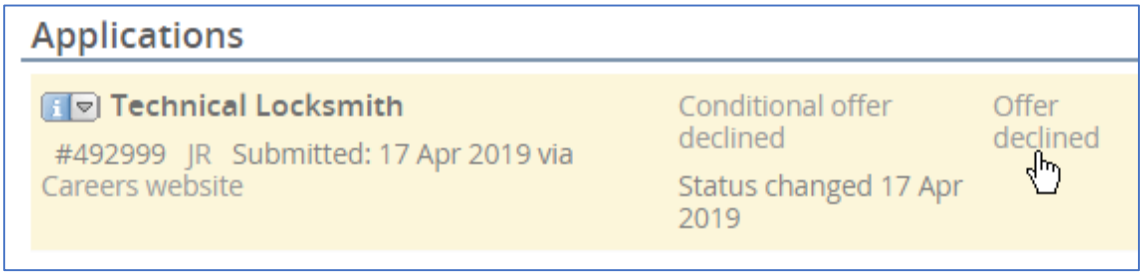
- The previous offer was declined, and you want to move forward with another applicant.
- You are authorized to make offers.
- You can edit the job requisition.

How to free the position

1. Open the job requisition.
2. Click on the name of the applicant who declined the offer. The Applicant card opens.

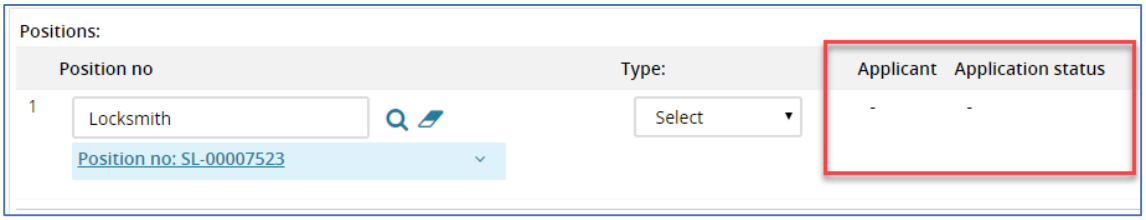


3. On the Applicant card, click the **Offer declined** status.



The Offer card opens.

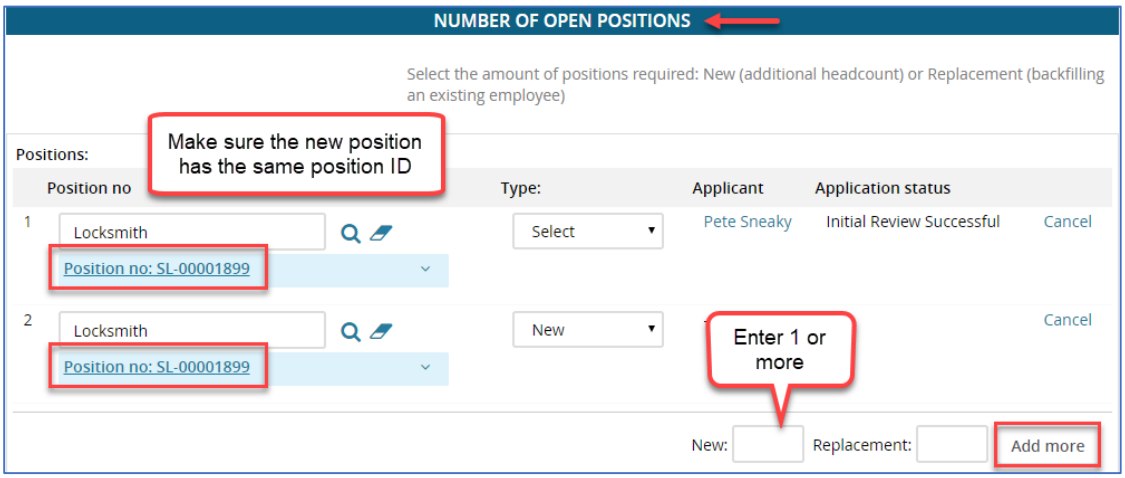
4. Click **Save & Close** at the bottom of the Offer card.
5. Click **Done** to close the Applicant card.
6. Refresh the job requisition to confirm that the position is free.



How to create another position

If freeing the position does not work, you can work around the issue by creating another position.

1. Open the job requisition.
2. In the **Number of Positions** section, enter "1" in the **New** or **Replacement** field.
3. Click **Add more**.
4. Enter the same position number in the Position no field, then click the Magnifying glass to ensure the blue box is filled.



5. Click **Submit & Exit** at the bottom of the job requisition.

Approval

If you use the same position number, you do not need to submit the new position for approval; the position was already approved.

What happens next

- The history of the declined offer is maintained on the Applicant card.
- You can move a candidate to the Prepare Offer status.

Related documents

- Troubleshooting