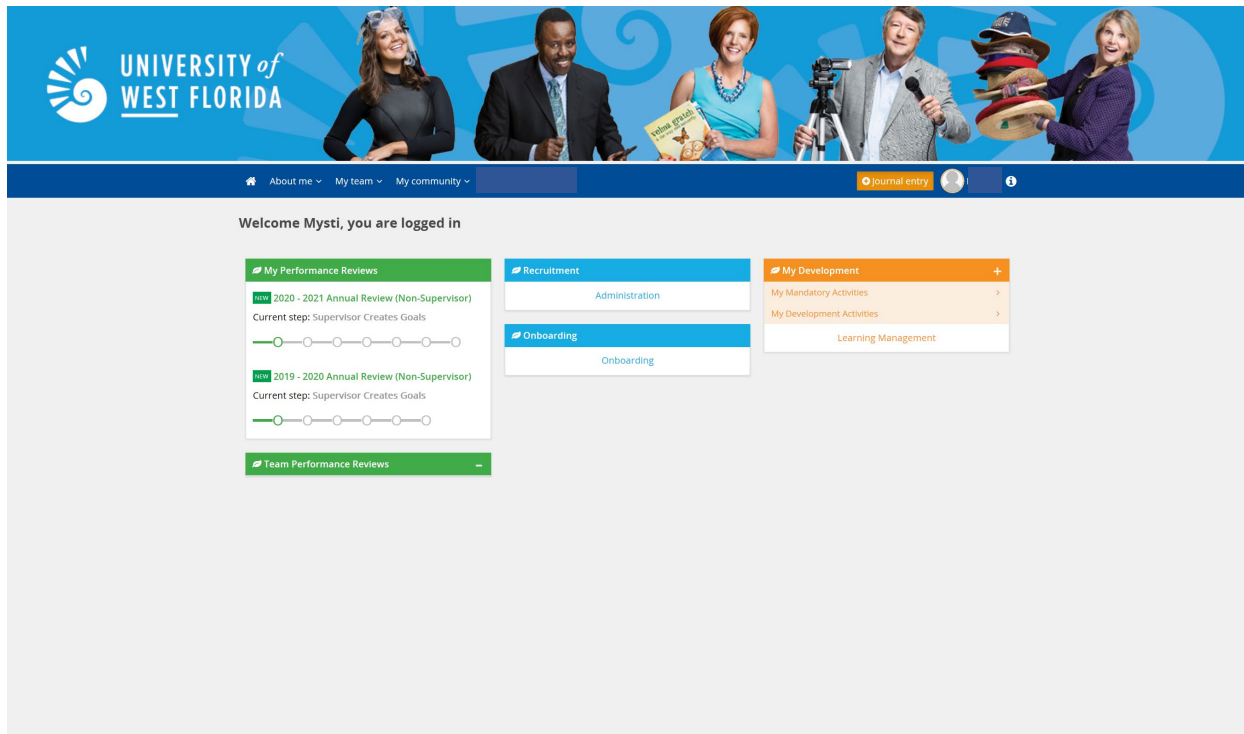


How to Create an Offer Letter



My Performance Reviews – shows the status of your performance review and clicking **My Performance Reviews** allows access of your review.

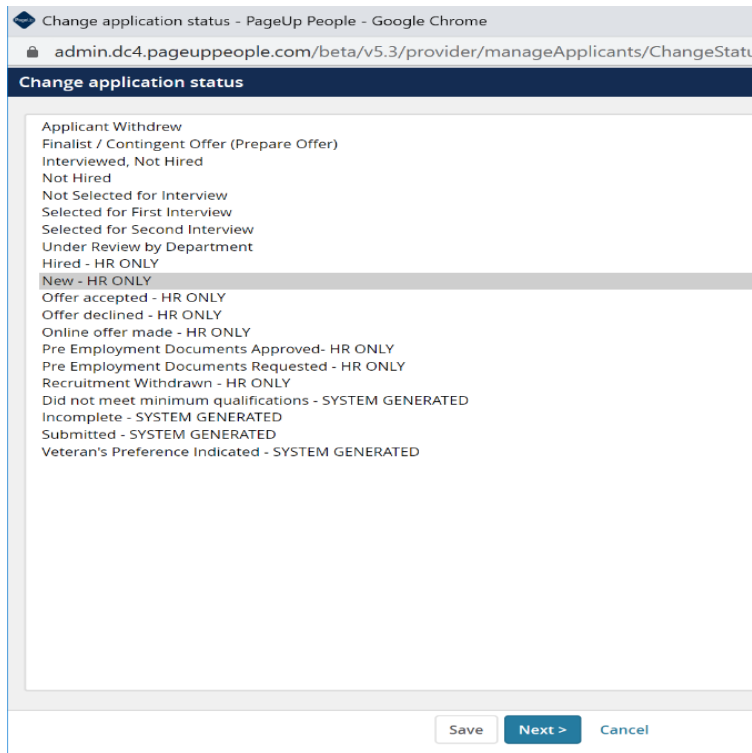
Recruitment - To access your PageUp Dashboard for managing Job Descriptions and Recruitments, click on **Administration**.

My Development – shows any professional development courses you have enrolled in via the Professional Development Learning Library. Click **Learning Management** to be taken to your development page.

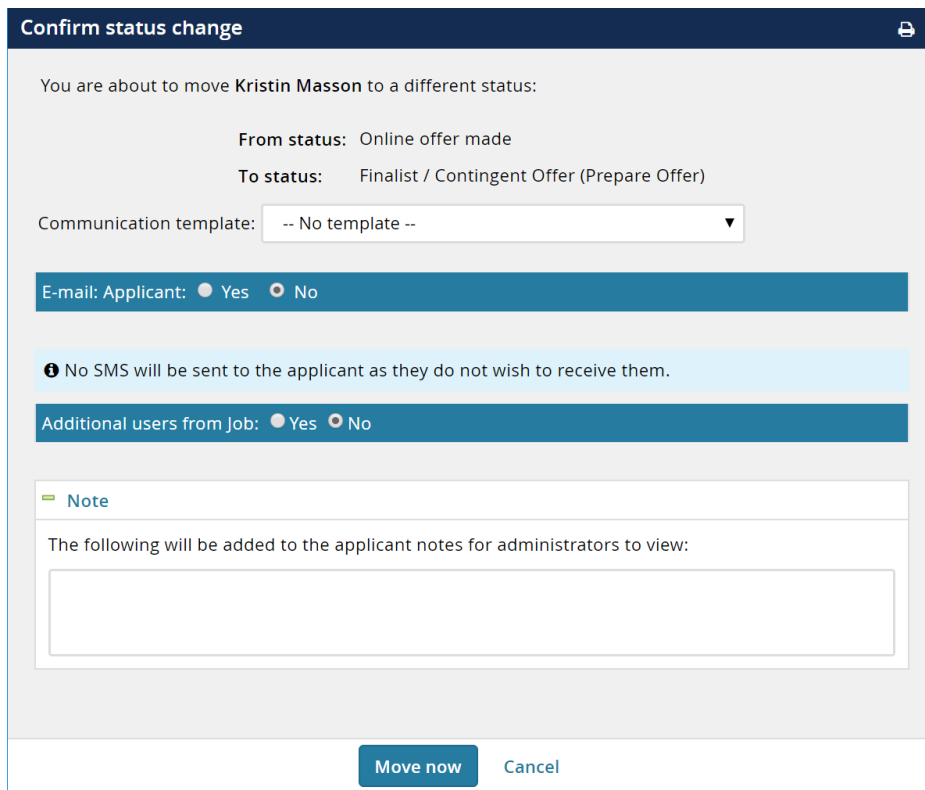
Team Performance Reviews – This tile will only have content if you supervise. To access your employee's performance reviews, click the appropriate **Review** title under the employee's name.

Onboarding – This tile will only be accessed if you have an Onboarding task to complete by clicking **Onboarding**.

To access job postings or job descriptions, click on **Administration** in the **Recruitment Tile**.



Once finalist has been moved to “**Finalist/Contingent Offer (Prepare Offer)**”, PageUp will prompt you to begin the Offer Letter process. Click **Next** to close popup.



Do not change information on this screen, select “**Move Now**” to proceed to the Offer Details page.

Offer details

Please fill in all mandatory fields marked with an asterisk (*).

Kristin Masson [Revision history](#)

Personal details

Address: Dori Fish
P42 Wallaby Way
Sydney Australia
Phone: 888-867-5309

E-mail: dori@fish.net

Applicant number:

[View profile](#)

Posting details

Position Title: **DOCUMENT TEST Office Administrator 493551**

Employment type: Staff Full-time

Division: President's Office

Department: Human Resources

Site: 001 -

Offer details

Approval status: **Pending**

Recruiter: Employment Team

Date entered: Apr 30, 2020, 5:45 pm

Date updated: May 18, 2020, 5:47 pm

Application source: Other - Employee referral [Edit](#)








No. of Vacancies:

Position no	Type	Applicant	Application status
⊙	New	Kristin Masson	Online offer made

POSITION DETAILS

The **Offer Details** popup will appear. Move down to the **Position Details** section to start putting in information.

POSITION DETAILS

Position Title:*	<input type="text" value="DOCUMENT TEST Office Administrator 493551"/>
Start date:*	<input type="text" value="Apr 30, 2020"/> 
End date if applicable:	<input type="text"/> 
Job Summary:*	<div style="border: 1px solid #ccc; padding: 5px;">the office in the Department of <u>LEEL</u>, College of Professional Studies. The incumbent is responsible for the management of all office operation and administrative duties assigned by the Chair. General duties include managing, training, recruiting, supervising of subordinates and delegating responsibilities to ensure the efficient operation of the department.</div>
Supervisor:*	<input type="text" value="April Harvey"/>   <div style="border: 1px solid #ccc; padding: 2px; background-color: #e6f2ff;">Email address: AHarvey@uwf.edu ▼</div>
Offer Signed By:	<input type="text" value="April Harvey"/>   <div style="border: 1px solid #ccc; padding: 2px; background-color: #e6f2ff;">Email address: AHarvey@uwf.edu ▼</div>
Date Offer Must Be Accepted By:*	<input type="text" value="May 15, 2020"/> 

Position Details:

- **Position Title** – Pulls over from Job Posting
- **Start Date** – Date should be far enough out to allow for all pre-employment paperwork to be completed and for offer acceptance.
- **End date if applicable** – Use only if the appointment has an end date.
- **Job Summary** – Pulls over from Job Posting; if it is blank, please input the information from the job posting.
- **Supervisor** – Person supervising the position
- **Offer Signed By** – (Optional field) Person to sign the offer letter, usually the Dean, Chair, VP or Supervisor.
- **Date Offer Must Be Accepted By** – Date finalist is expected to respond, allow a minimum of three business days for acceptance.

SALARY DETAILS

Annual salary:	<input type="text"/>
<i>To calculate Biweekly amount, divide Annual Salary by 26.1.</i>	
Biweekly Amount:*	<input type="text"/>

Salary Details (Used for Line Staff and Faculty positions):

- **Annual Salary** – Exact annual amount to be offered
- **Biweekly Amount** – To calculate **Biweekly Amount**, divide **Annual Salary** by 26.1.
 - For OPS/Student enter "0". This field does not pull over to OPS/Student offer letters; it does merge into letters for Faculty and Line Work Force offer letters.

How to Create an Offer Letter

OPS DETAILS

Only applies to OPS Hourly Positions. Skip if not applicable.

Hourly Rate:

Hours per Week:

OPS Details (Only Used for OPS/Student positions):

- **Hourly Rate**
- **Hours per Week**

OFFER PROGRESS

The following fields will be automatically updated by the system

Offer accepted: Yes No

Date offer accepted: 

Offer declined: Yes No

Date offer declined: 

Please do not change anything in this section – Offer Progress (Section will populate when finalist has accepted or decline the offer.)




Offer documents

 Documents attached to the offer appear in the section below.

- 

Document	Date	Size	Category
----------	------	------	----------

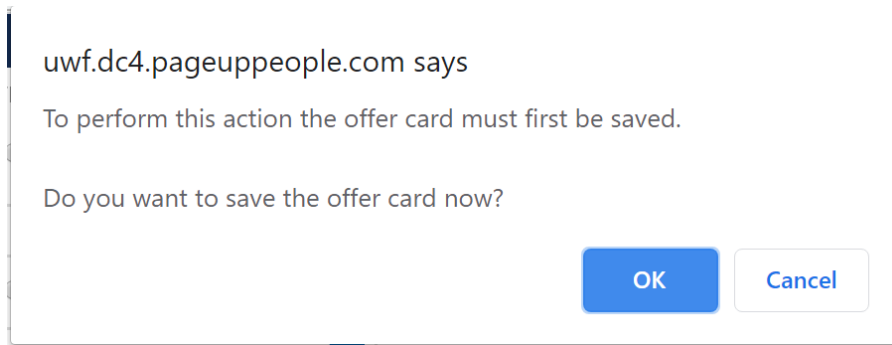
Document library:

Name	Date	Size	
 FFCRA Poster	Mar 26, 2020	175Kb	View
 Offer Letters (8)			
 Selection Report (2)			

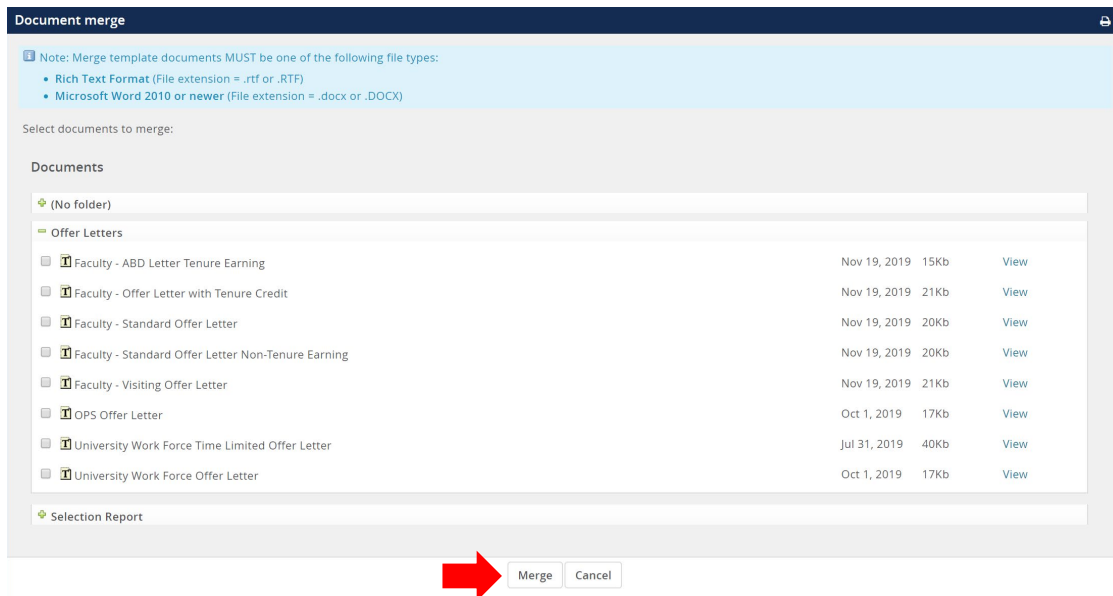
Offer Document: You can add your offer letter or opt to Merge Document in PageUp

- If you want to merge, click **Merge Document** and a popup will appear.

How to Create an Offer Letter

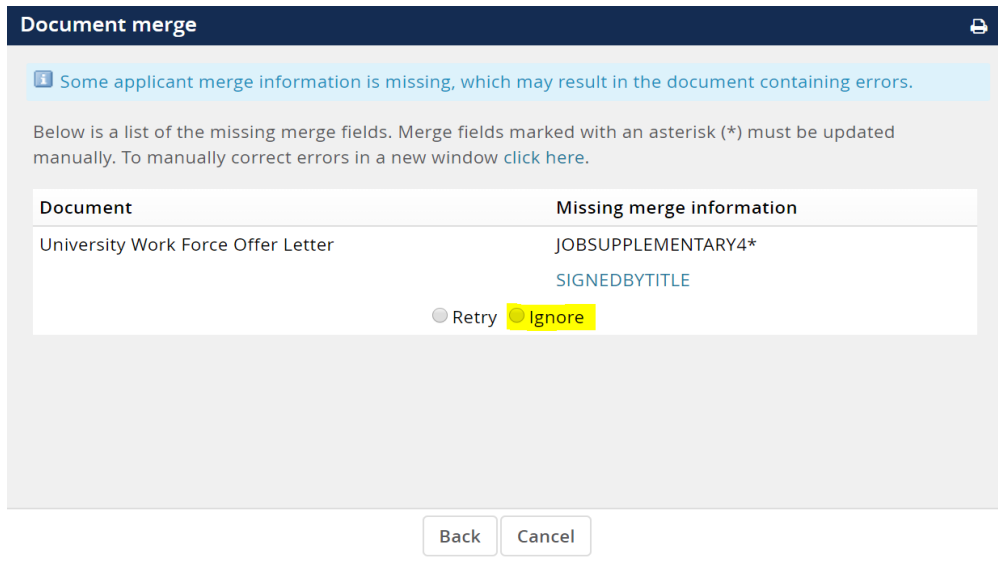


- Click **OK** to save offer and **Document Merge** popup will appear.



Document Merge popup:

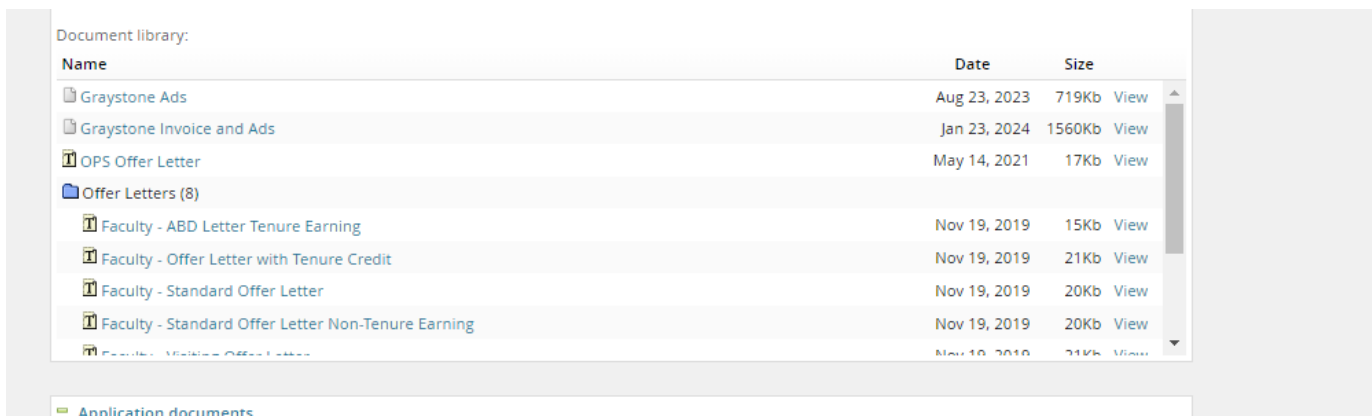
- **View** – gives a preview of offer letter template without merged information
- Each offer letter template has a **checkbox**, to select an Offer Letter template check the box next to the appropriate letter.
- Click **Merge** and the **Document Merge** popup will appear.



- Click **Ignore** on **Missing Merge Information** popup (this can be edited on the letter)
- Click **Back** to exit popup and be returned to the offer document section.

If you choose to upload your own Offer Letter:

- You may view the relevant template listed in the "Offer Letters" folder under the Document Library heading. Locate the relevant template and click **View** to download and open the offer letter.
- Department may edit/add information as needed then save to departmental letterhead.
 - Offer letter must be signed by the appropriate departmental authority (hiring official, supervisor, or search committee chair, etc.) prior to being uploaded back into PageUp.
 - If your department requires a signed acceptance (wet signature), please let finalist know that they need to sign and send one to the requester outside of PageUp (email, fax, etc.). PageUp does not provide a signed version (wet signature) of the accepted offer letter. The date stamp in PageUp meets the requirements for SACS and Human Resources.



How to Create an Offer Letter

Offer documents

Documents attached to the offer appear in the section below.

Add document Merge document ?

Document	Date	Size	Category	
University Work Force Offer Letter	Apr 30, 2020	17Kb	Offer Letters	View Delete

Document library:

- Click **Add Document** to upload signed offer letter to the offer card.

Upload a new document

File:* Signed Offer Letter on Letterhead.docx (12 kb) [Delete](#)

Document category:* Offer Letters

Title: Signed Letterhead

[Save and add another](#) [Save and close](#) [Close](#)

- Select **File** to upload
- Select **Document category** (Offer Letters)
- Title** – please include a document title
- Save and add another** – if additional documents are needed
- Save and close** to exit back to offer document

Offer documents

Documents attached to the offer appear in the section below.

Add document Merge document ?

Document	Date	Size	Category	
Signed Letterhead	May 1, 2020	12Kb	Offer Letters	View Delete
University Work Force Offer Letter	Apr 30, 2020	17Kb	Offer Letters	View Delete

Document library:

- Click **Delete** next to the template offer letter or any duplicate offer letters displayed.

Application documents



Documents uploaded by the applicant are displayed in blue.

Documents belonging to a different application are marked with an asterisk (*).

Title ▼	Size	Category	
Cover Letter (Test) K.Masson.docx *	12Kb	Cover letter	View
Cover Letter (Test) K.Masson.docx	12Kb	Cover letter	View
List of References (Test) K.Masson.docx *	12Kb	Supporting Applicant documents	View
Reference letter.docx *	12Kb	Supporting Applicant documents	View
Resume (Test) K.Masson.docx *	12Kb	Resume	View
Resume (Test) K.Masson.docx	12Kb	Resume	View
Resume (Test) K.Masson.docx *	12Kb	Resume	View
Veterans Preference (Test) K.Masson.docx	12Kb	Supporting Applicant documents	View

Skip this section – Applicant Documents – Shows all documents associated with applicant.

Approval process

Originator:*  

[Email address: mvanhoose@uwf.edu](mailto:mvanhoose@uwf.edu) ▼

Approval process: ▼

Approval Process:

- **Originator** is the person filling out the offer details.
- **Approval process** (See SCOOP in MyUWF for Supervisory Chain of Command)
 - **OPS/Faculty/Student Offers** – Follow Departmental approval process

How to Create an Offer Letter

Application status

Update application status following offer: Yes No

Save and close Save Remove Offer Cancel

Application Status:

- Change “**Update application status following offer**” to **Yes**.

Save/Save and Close/Remove/Cancel:

- **Save and Close** starts approval process and closes offer pop up.
- **Save** will save a draft and close pop up. Offer can later be accessed from finalist’s application.
- **Remove Offer** – resets offer card.
- **Cancel** exits screen without saving.

The offer will route through selected approval process and will come to HR last for review. HR will review the offer letter and contact the department if additional information is needed. Once the offer letter is approved and the appropriate onboarding routing is selected by HR, then the offer will be sent to the finalist. The Supervisor/Department Admin/Initiator will receive an email from PageUp indicating the offer has been sent. Additional PageUp emails will follow as the finalist accepts/declines the offer and as pre-employment documents are completed.

Departments should submit the New Hires Needing Essential Documents Form to Human Resources and ask your finalist to review the information on the Human Resources’ New Hire webpage.

The new hire essential documents will be collected by Human Resources and the Department may have the Personnel Action Form prepared and sent along to HR. To locate the Personnel Action Form, please log into MyUWF and enter Personnel Action Form in the search box.

All Personnel Action Forms are now routed for signature via DocuSign. Please consult with your Business Manager for specific instructions on how your Division is handling this process.

Department contacts will receive an email from HR stating that the pre-employment paperwork is complete. Once the finalist is cleared for hiring then the department should change the remaining applicant statuses. (See [How to Update Applicant Statuses and Create Status Emails](#))

Tracking Offer Acceptance and Pre-employment Paperwork

- HR changes status to **Online offer made - HR ONLY** this sends offer to finalist.
- When finalist accepts/declines, status will change to match – this can be seen on:
 - Applicant card
 - History tab shows exact date/time
 - Offer card
 - Shows date
- After accepted, finalist receives email to access onboarding portal which contains their pre-employment paperwork. Department will receive an email update from PageUp when all paperwork has been submitted for HR processing.
- After HR approves all pre-employment paperwork, HR emails department with OK to hire.

Tracking Offer Acceptance and Pre-employment Paperwork

The dashboard consists of six tiles arranged in a 2x3 grid:

- Job Description:** Contains two buttons: "My job description" and "Manage job descriptions".
- Active Jobs Not Filled:** Shows "2 Jobs open" and "4 Team jobs open". Includes a "New job" button.
- Approvals:** Shows "0 Jobs awaiting your approval" and "3 Approved".
- Current Jobs on Career Site:** Shows "0 Current Jobs on Career Site".
- Applications:** Shows "2 Jobs have applicants for review" and "0 Applicants assigned to you for review".
- Offers:** Shows "0 Offers awaiting your approval" and "1 New hires" (highlighted in yellow).

From the Supervisor's (the person listed as the supervisor on the offer card) Dashboard, click on **New Hire** in the bottom right tile.

The screenshot shows the University of West Florida HR dashboard. At the top, there are navigation tabs for "Jobs", "People", and "Recent Items". Below the navigation is a "My new hires" section with search filters for First name, Last name, Requisition Number, Title, Application status, Business unit, and Department. A "Clear" and "Search" button are present. Below the filters is a table with one row of data:

First name	Last name	Requisition Number	Title	Application status	Business unit	Department	Date started	View offer details	View all tasks
Mickey	Mouse	493614	WDW CEO 12345	Offer accepted - HR ONLY	Select	No Business unit selected	Oct 19, 2020		

View Offer Details - goes to the finalists offer card.

View All Tasks - goes to the finalists list of onboarding tasks that HR has assigned.

How to Create an Offer Letter

Offer details

Approval status: **Approved**

Recruiter: Employment Team

Date entered: Aug 6, 2020, 8:51 am

Date updated: Aug 11, 2020, 10:28 am

Application source: Internet - Invite to apply [Edit](#)

No. of Vacancies:

Position no	Type	Applicant	Application status
<input checked="" type="radio"/> 12345	New	Mickey Mouse	Offer accepted - HR ONLY

POSITION DETAILS

Position Title:* WDW CEO 123

Start date:*

End date if applicable:

Job Summary:* Job Description

Supervisor:* Walt Disney
wdw@wd.world

Offer Signed By:
No user selected.

Date Offer Must Be Accepted By:*

SALARY DETAILS

Annual salary:

To calculate Biweekly amount, divide Annual Salary by 26.1.

Biweekly Amount:*

OPS DETAILS

Only applies to OPS Hourly Positions. Skip if not applicable.

Hourly Rate:

Hours per Week:

OFFER PROGRESS

The following fields will be automatically updated by the system

Offer accepted: Yes No

Date offer accepted: Aug 11, 2020

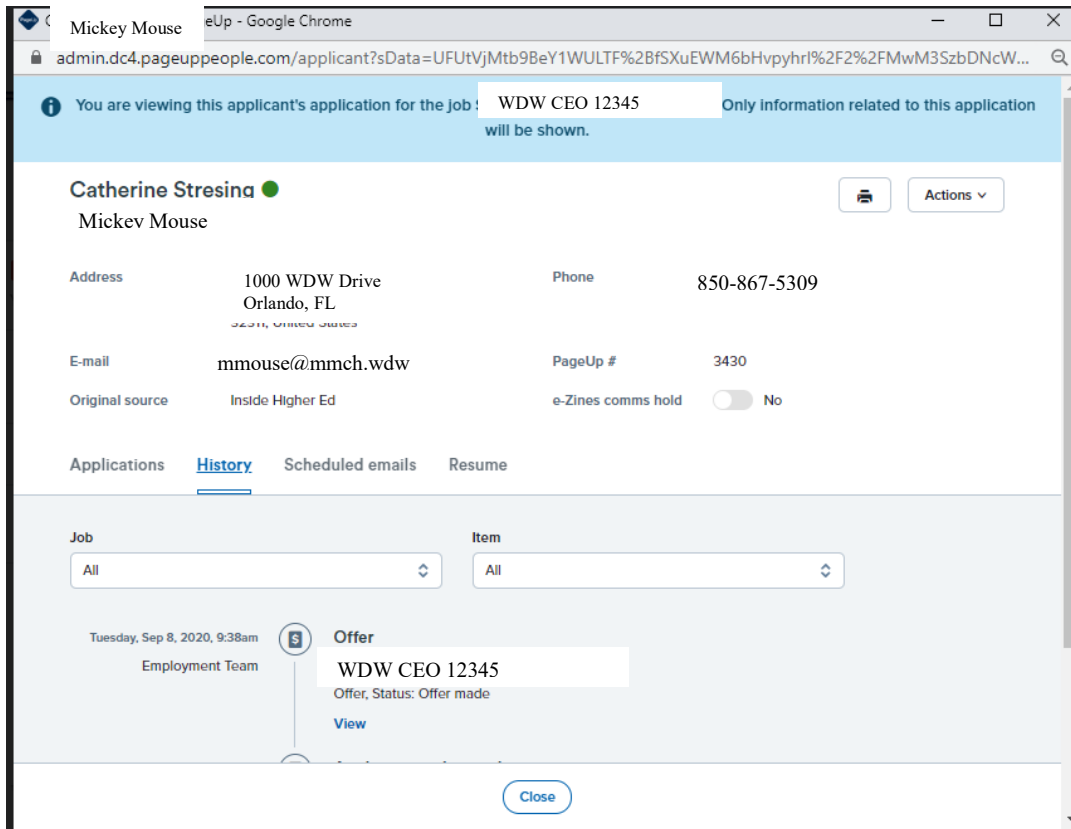
Offer declined: Yes No

Date offer declined:

Offer Card

On the **Offer Details** page, scroll down to the **OFFER PROGRESS** section, this will indicate the date the offer is accepted or declined.

By clicking on the applicant's name (in the **No. Of Vacancies** section), it will take you to their **Applicant Information Card**.



On the **Applicant Information Card**, click on the **History** tab, it will show the date and time stamp for all actions related to the applicant for the selected job.

Job Dropdown – Shows all positions within department to which the person has applied.

Item Dropdown - Shows all document and communication types associated with applicant. This can be used to sort and find reference letters, communications, etc.

Task List

New hire tasks

Task	Assigned to	Due date	Status
Pre-Employment Forms			
Background Screen Form	Mickey Mouse	05 Aug 2020	Completed
Florida Retirement System (FRS) Certification Form	Mickey Mouse	27 Sep 2020	Completed
Statement of Controlled Substance Conviction Form	Mickey Mouse	27 Sep 2020	Completed

The new hire task list will show the pre-employment paperwork that has been assigned to the finalist and its status (incomplete/complete).

How to Create an Offer Letter