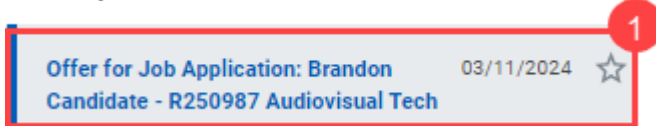


Job Application Stage: Create and Extend Offer

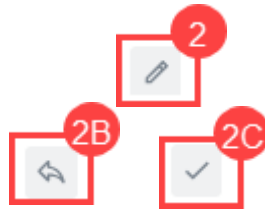
You may initiate offer to candidates who applied to a job requisition in Workday.
Each step in this QRC is applicable to different audiences depending on the job the candidate is applying for.

Initiate Offer – Hiring Managers /Dept. Recruiting Rep

1. Go to **My Tasks** and select the **Offer for Job Application** Task.

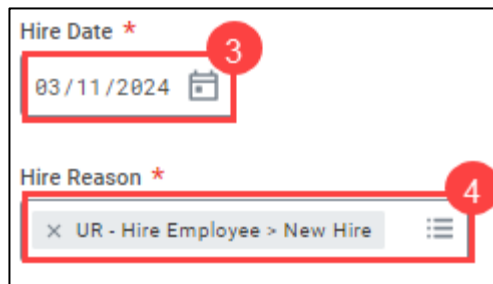


2. For each section, select the **pencil icon** to edit and update.
 - A. Select the **left arrow icon** to undo updates.
 - B. Select the **checkmark icon** to save updates.



Details

3. Select **Hire Date**. Enter the proposed hire date for the candidate. The HR Liaison will set the start/hire date with the candidate during offer/pre-employment stage.
4. Select **Hire Reason**. The selected Reason must begin with “UR – Hire Employee”.



Job Details

5. Confirm or update **Business Title**.
6. Select **Next**.
7. Confirm the information for **Offer**.
8. Select **Submit**.



Request to Make an Offer – Hiring Managers/ Dept. Recruiting Rep

9. Go to **My Tasks** and select the **Request to Make an Offer** task.
10. Complete the offer form, include any attachments needed to support review of offer.
11. Select **Submit**.

Note: This process is mandatory for all staff hires.

Propose Compensation Offer –HR Business Partner

12. Go to **My Tasks** and select the **Propose Compensation** task.
13. Enter compensation information for Salary, Hourly, and Allowance sections. For additional guidance, refer to the Change Compensation QRC.
14. Select **Submit**.

Job Application Stage: Create and Extend Offer



48-Hour Sheet / Pre-Offer Verification Checklist – *HR Liaisons & HR Recruiters*

1. Go to **My Tasks** and select the **48-Hour Sheet / Pre-Offer Verification Checklist** task. This task is applicable to HR liaisons and recruiters only.
2. For each checklist item, select **Yes** or **Not Applicable** and enter comment.
3. Select **Submit**.

Extend the verbal offer to candidate– *Hiring Managers / Department Recruiting Reps*

1. Review the extend verbal offer step in your task inbox in myURHR to review the details of the offer for the candidate.
2. Extend the verbal offer to the candidate. Be sure to discuss compensation with the candidate. If there are any changes in compensation needed, please click the **send back** button, select HRBP Consolidated review, and enter the reason for your HR Business Partner to review and make the needed updates, if applicable.
3. If the candidate accepts the verbal offer, please click the **Approve** button to confirm acceptance so that your HR Liaison can work with the candidate on the next steps in the hiring process. **Please only click approve if the offer was extended.**
4. Once a start date is established, the HR Liaison will update the hire date and send the offer letter to the candidate to acknowledge. The hire date can be viewed on the offer details tab (*Offer section*) on the candidate profile.

Review Offer for Job Application: Joe Test - R250983 Ambulatory Tech I ...

Please extend Verbal Offer to the candidate.

- If there are any changes in the compensation, please use the "send back" button and route the step to HR Business Partner. Make sure you add a note for the HR Business Partner with the revise compensation.
- Once the HR Business Partner updates the compensation, this step will route to you again for approval before it is sent to the HR Liaison for Hire Date updates and letter generation.

Submit this step if there are no changes in the compensation.

For

Job Application: Joe Test - R250983 Ambulatory Tech I on 04/17/2024

Overall Process

Offer for Job Application: Joe Test - R250983 Ambulatory Tech I

Overall Status

In Progress

Details to Review

Hire Date

* 04/17/2024

Hire Reason

* UR - Hire Employee > New Hire

Location

* James P. Wilmot Cancer Center

Job Profile

UR4121H - Ambulatory Tech I (H)

Business Title

* Ambulatory Tech I

Approve

Send Back

Save for Later

Cancel

Job Application Stage: (Offer) HR Liaisons



Set Verbal Offer Status- *HR Liaisons*

1. Go to **My Tasks** and select the **Set Verbal Offer Status** To Do task.
2. Add verbal offer status for the candidate.
3. Select **Submit**.
4. The Offer Letter is generated in **My Tasks** for your review.

Generate Offer Letter – *HR Liaisons*

1. Go to **My Tasks** and select the **Offer Letter** task.
2. Select **Review**.
3. Review the offer letter. Please do not make updates to auto-populated values in the letter. These values are defaulted from the candidate's application, position of the offer, and the approved offer information. Provide information to the red **Update** sections only.
4. Click the **Preview** button to review the offer and make sure no other changes are needed before selecting **Submit**.
5. Select **Submit**. Once submitted, the candidate will receive the offer letter to review and acknowledge.

A screenshot of the 'Staff Offer Letter' preview interface. The title is 'Staff Offer Letter' with a subtitle 'Source: Offer' and a 'Preview' button. Below the title is a menu bar with 'File', 'Edit', 'Format', 'Insert', and 'Layout'. A toolbar contains various formatting options like paragraph, font size (12), bold, italic, underline, and text color. The main content area shows a draft letter with a red box highlighting the 'Update' section. The letter text includes a date 'March 11, 2024', a name 'Brandon' with a 'Candidate' tag, a salutation 'Dear Brandon,', and a congratulatory message. A red circle with the number '3' is next to the red box.

Staff Offer Letter Source: Offer Preview

File Edit Format Insert Layout

Paragraph 12 B I U A [color picker] [font size] [bullets] [numbered list] [link]

March 11, 2024

Brandon Candidate

,

,

Dear Brandon,

Congratulations and welcome to the University of Rochester. This letter is confirmation of our recent conversation and a formal offer of employment. The following information describes your employment.

Set Written Offer Status- *HR Liaisons*

1. Once the candidate acknowledges the offer letter, you will receive a task to confirm the candidate has signed the offer letter and to set a written offer status.
2. In the candidate's profile, confirm that the candidate has acknowledged and accepted the offer letter.
3. Click on Blue Set offer and Employment agreement button to **Set the Written Offer Status**.
4. Select **Written Offer Accepted** for **Offer and Employment Agreement Status**.
5. Select **Ok**.
6. Select **Submit**.

A screenshot of a dropdown menu for 'Offer and Employment Agreement Status'. The menu is open, showing the selected option 'Written Offer Accepted'. A red box highlights the dropdown area, and a red circle with the number '4' is next to it.

Offer and Employment Agreement Status * Written Offer Accepted ▼

Job Application Stage: Create and Extend Offer

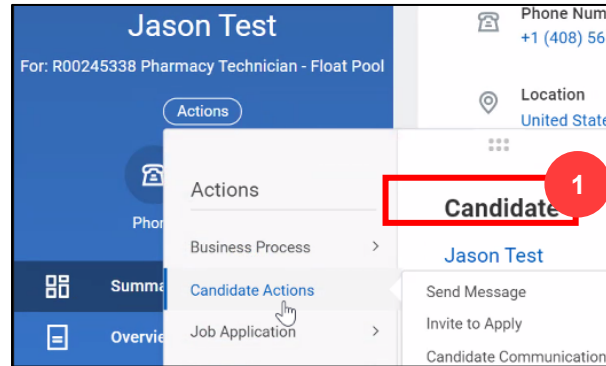
Send Message: Form I-9, Health Screening and Parking Pass Attachment -HR Liaison

In the **Candidate Profile**:

1. Select actions, hover over candidate actions, and select **send Message**. Select the application that the candidate is being considered for and select the template needed to send message for each of the below messages:

- Form I-9
- Health Screening
- Parking Pass (attach the pass)

Note: Repeat the process to send all three above messages.



Find Duplicates

In the **Candidate Profile**:

1. Select the **Overview** tab.
2. Select **Duplicates**.
3. Review the **Potential Duplicates** table. If the candidate is a rehire, contingent worker or student/student worker, contact HR Data Services to merge duplicate records.

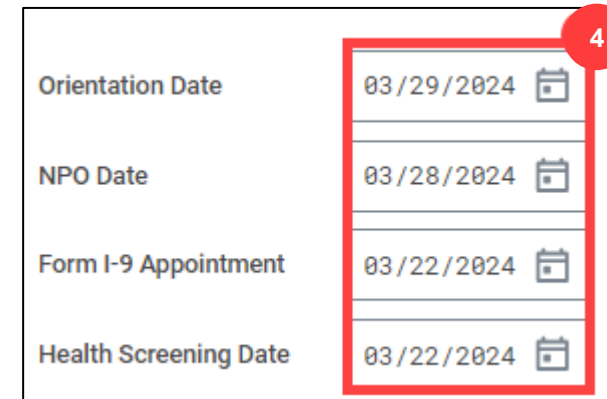
Note: candidates with duplicate records may proceed with **Pre-employment requirements** but cannot proceed to **Ready for Hire**.

4. Once the records are merged, go to either the **Recruiting Hub** or **Candidate profile** to access the **Find Duplicates** task.
5. Select **Submit**.

HR Checklist/Additional Data- HR Liaison

In the **Candidate Profile**:

1. Select the **Overview** tab.
2. Select **Additional Data**.
3. Under **Candidate Additional Details**, select **Edit**.
4. Enter dates as applicable.
5. Select **OK**.



Orientation Date	03/29/2024
NPO Date	03/28/2024
Form I-9 Appointment	03/22/2024
Health Screening Date	03/22/2024

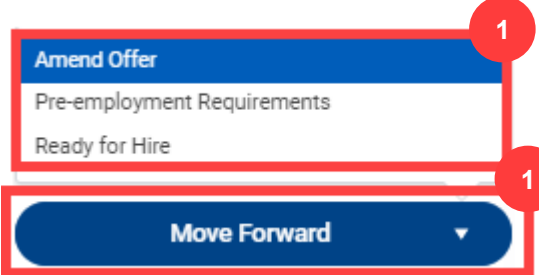
6. In the Recruitment Hub, select the **HR Checklist – Additional Data To Do** task.
7. Select **Submit**.

Note: **Ready for Hire** step triggers additional divisional/department required approvals. Check business process to ensure they are completed prior to hire date.

Job Application Stage: Create and Extend Offer

Make Offer Decision – HR Liaison

1. If changes need to be made to the offer during the offer stage, select **Amend Offer** to complete them before moving the candidate to the **Pre-Employment requirements stage**.
2. After completing the steps in the offer stage, the candidate is ready to be moved to **Pre-Employment** requirements stage to complete their background check, self-disclosure, and Pre-Hire Checklist, which includes clearing all pre-hire requirements before moving the candidate **Ready for Hire**.
3. If changes need to be made during the **Pre-Employment Requirement** stage, select **Start Parallel Amend offer**.



The screenshot shows a vertical menu with three options: 'Amend Offer', 'Pre-employment Requirements', and 'Ready for Hire'. Below this menu is a blue button labeled 'Move Forward' with a dropdown arrow. Red boxes and numbers '1' highlight the 'Amend Offer' button and the 'Move Forward' button.

Note: candidates with duplicate records may proceed with **Pre-employment requirements** but cannot proceed to **Ready for Hire**.