

Creating and Sending the Offer

After the candidate verbally accepts the terms of an offer, you will create the offer letter using the appropriate template available on the [recruitment toolkit](#). You are now ready to create the offer process in TREMS.

The offer process requires **two** applicant status changes: 1) a move to 'Verbal offer' and 2) a move to 'Online offer made.' You must move the selected candidate to 'Verbal offer' status, complete the Offer Card and receive Offer Card approval, before moving to 'Online offer made' status.

A tip as you work through the offer card - pay attention to the light gray text for helpful hints on how to accurately complete the fields.



DO NOT use the bulk move feature when moving to 'Verbal offer.' Always open the applicant card for each individual receiving an offer. Using bulk removes critical information from the offer card.

HOW TO: CREATE THE OFFER

1. Open the applicant card for the selected candidate.

Submitted Status	Pref Name	First name	Last name	Phone	Mobile	Email	Country	State	City	Ref. Score	Dup	Undisclosed	Employee Source	Sub-source
Dec 23, 2019 Verbal offer	Bucky	Bucky	Badger	6086086088		buckybadger@gmail	United States	Wisconsin	Madison	0	False		Internet	Twitter
Dec 23, 2019 Search committee review	Fiona	Fiona The	Hippo	124201777		fionahippo@gmail.c	United States	Ohio	Cincinnati	0	False		Other	EmpRef
Dec 27, 2019 Search committee review	Fins	Fins	ToTheLeft	(402) 291-5678		fins@fins.com	United States	New Mexico	Bellevue	0	False		Other	EmpRef
Dec 20, 2019 Phone Screen Accepted	Izzy	Izzy	Johnson	608-555-5555		izzy@gmail.com	United States	Wisconsin	Madison	0	False		Internet	FB
Dec 23, 2019 Interview 2 accepted	Ross	Ross	Geller	9876543214		DrRossGeller@gmail	United States	Wisconsin	Madison	0	False		Internet	Chronicle

2. Click on the status to begin the offer card creation:

Ross Geller

[View profile](#) [Add flags](#)

Address 951 Central Park Ave
Madison, Wisconsin
53715, United States

E-mail DrRossGeller@gmail.com

Original source Chronicle of Higher Education

e-Zines comms hold No

Applications History Scheduled emails CRM Resume

TRAIN81707-US - ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS)

Date submitted Dec 23, 2019	Applied via Chronicle of Higher Education	Status changed Dec 6, 2021 Interview 2 accepted	Offer Offer accepted
Resume View	Form View	Add flags	

3. Select Verbal offer and click Next.

Change application status

- New
- Does not meet minimum qualifications
- Search committee review
- Hiring Manager review
- Phone screen
- Phone Screen Accepted
- Phone Screen Declined
- Interview
- Interview 1 accepted
- Interview 1 declined
- Interview 2
- Interview 2 accepted
- Interview 2 declined
- Interview 3
- Interview 3 Accepted
- Interview 3 Declined
- Reference check
- Verbal offer**
- Background Check
- Background check successful
- Online offer made
- Offer accepted
- Offer declined
- JEMS new identification form paperwork complete
- Withdrawn
- No longer considered
- Cancelled
- Submitted
- Incomplete

Buttons: Save, Next >, Cancel

4. Confirm this status and date. In the 'Note' section, please indicate division approval to proceed with faculty and/or essential employee offer. Then click 'Move now.'

Confirm status change

You are about to move Ross Geller to a different status:

From status: Interview 2 accepted
To status: Verbal offer

Communication template: -- No template --

E-mail: Applicant: Yes No

No SMS will be sent to the applicant as they do not wish to receive them.

Additional users from Job: Yes No

Status	Date	Time	User
<input checked="" type="checkbox"/> Interview 2	Nov 10, 2021	1:08 pm	ERICA FINI-MARTEN
<input checked="" type="checkbox"/> New application	Dec 23, 2019	9:10 am	ERICA FINI-MARTEN
	7 Jan 2020	12:01 pm	PageUp Administrator
	Jan 7, 2020	10:54 am	ERICA FINI-MARTEN
	9 Feb 2021	6:28 am	A02/A03 Division HR
<input checked="" type="checkbox"/> Phone screen 1	Jan 2, 2020	1:42 pm	ERICA FINI-MARTEN

Buttons: Move now, Cancel

5. This will bring up the Offer Card. Fill in all fields marked with an asterisk. This includes the title you have chosen, start date, end date (if applicable), FTE, salary/pay and probation type.

Ross Geller (Ross) [Revision history](#)

Personal details

Address: 951 Central Park Ave
Madison, Wisconsin
53715, United States Phone: 9876543214

E-mail: DrRossGeller@gmail.com

Applicant number: 57395

[View profile](#)

Job details

Posting Title: **ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INTL PROGRAMS).**

Division: A07- DIV-COL OF AG & LIFE SCIENCES

Department: INTERNATIONAL AG PROG ADMIN-GEN

Site: -

Work Type: Staff-Full Time

Offer details

Approval status: Pending

Hiring Manager: A02/A03 Division HR

Date entered: Jan 22, 2020, 2:18 pm

Date updated: Feb 9, 2021, 6:28 am

Application source: Internet - Chronicle of Higher Education [Edit](#)

Positions:	Position no	Type:	Applicant	Application status
<input checked="" type="radio"/>	TRAIN81707-US	New	Ross Geller	Verbal offer

POSITION DETAILS

Delete title(s) that do not apply. Leave the selected title and title code. Example: ADMIN PROGRAM SPEC (R07DB)

Selected title and title code:

6. The Selected title and title code field automatically populates with the official title(s) from JEMS. Delete titles that do not apply. **DO NOT edit the selected title and title code!** (This means no extra spaces, letters, numbers, or special characters.)

Positions:	Position no	Type:	Applicant	Application status
<input checked="" type="radio"/>	TRAIN81707-US	New	Ross Geller	Verbal offer

POSITION DETAILS

Delete title(s) that do not apply. Leave the selected title and title code. Example: ADMIN PROGRAM SPEC (R07DB)

Selected title and title code:

Creating and Sending the Offer

- 7. Select the start date by clicking the calendar icon. If the appointment is terminal, select the end date. The end date must match PVL.

Positions:			
Position no	Type:	Applicant	Application status
<input checked="" type="radio"/> TRAIN81707-US	New	Ross Geller	Verbal offer

POSITION DETAILS

Delete title(s) that do not apply. Leave the selected title and title code. Example: ADMIN PROGRAM SPEC (R07DB)

Selected title and title code:

Hiring Administrator:

[Email address: FINIMARTEN@WISC.EDU](#) ▼

Start date:*

End date if applicable: must match PVL:

- 8. Enter the FTE. The FTE should be entered as a whole number and not a decimal. For example, a 1.0 FTE should be entered as 100.

Empl class:	<input type="text" value="Limited"/>
FTE:*	<input type="text" value="100"/>

- 9. Enter the pay rate in the correct field.

SALARY	
Annual/Academic Salary:	<input type="text"/>
Hourly Pay rate (if not Annual/Academic Salary):	<input type="text" value="21.00"/>
Pay Basis:	<input type="text" value="Hourly"/>

- 10. Choose the appropriate probation period type from the dropdown menu. A probation period is not required for temporary (TE), Limited (LI) or Faculty (FA) employment classifications.

Probation period type:*	<input type="text" value="Probationary Period"/>
Use Probationary Period for US or FTF Evaluation Period for Academic Staff CHS for CHS Professor Series or Not Required	
Probation length:	<input type="text" value="6 Month"/>
Please indicate the length of the probation: 6 month - 12 month - 18 month or 24 month	

11. Indicate if a background check and/or I-9 is required.

PRE-EMPLOYMENT CHECKS

Is a criminal background check required? Yes No

Background checks apply to all vacancies except when hires are made in student hourly employee-in-training and TE appointments or when employees move from another UW campus or state agency unless the vacancy involves a position of trust. If an individual is returning to the UW after less than a one-year absence it is not required that a new check be done unless the employee is moving to a position of trust

Is an I 9 required? Yes No

12. Select the 'New employee details - New start form' from the 'New starter form' dropdown menu. Then select 'General onboarding' from the 'Onboarding workflow' dropdown menu.

ONBOARDING

New starter form:* ▼

Onboarding workflow:* ▼

13. The Reports to Manager will automatically populate from the Job Card. If the Reports to Manager has changed, click the Erase icon and enter the name of Reports to Manager. Use the Search icon to search for the name if necessary.

Reports to manager:*

Email address: FINIMARTEN@WISC.EDU ▼

14. The Onboarding Coordinator will automatically populate with Reports to Manager name. Update to reflect the name of the onboarding coordinator in the unit. Click the Erase icon and the enter name of the Onboarding Coordinator. Use the Search icon to search for the name if necessary.

Onboarding Coordinator:*

Email address: FINIMARTEN@WISC.EDU ▼

15. The 'Offer progress' fields are system generated and default to No. Do not edit these fields.

OFFER PROGRESS

The following fields will be automatically updated by the system

Offer accepted: Yes No

Date offer accepted: Feb 4, 2020

Offer declined: Yes No

Date offer declined:

HOW TO: ADD THE OFFER DOCUMENTS

On the Offer Card, you will add all the documents associated with the offer. Documents include the offer letter and offer letter attachment, as well as any other necessary documents such as a copy of the position description, Academic Staff Policies and Procedures or Faculty Appointments Links to Policies.

1. Standard documents including the Offer Letter Attachment, Academic Staff Policies and Procedures and Faculty Appointments Links to Policies are stored in TREMS and available to merge to the offer card. Always use these documents to ensure you attach the most current version. To merge the document(s), click 'Merge Document.' A screen will appear asking you to save the offer card before the merge can occur. Click 'OK.'

The screenshot shows the 'Offer documents' section of the TREMS interface. At the top, there is a blue header with the text 'Documents attached to the offer appear in the section below.' Below this header are two buttons: 'Add document' and 'Merge document'. The 'Merge document' button is circled in red. Below the buttons is a table with columns for 'Document', 'Date', 'Size', and 'Category'. Underneath the table is a 'Document library' section with a table listing various documents.

Document	Date	Size	Category
Final template for EEO for Madison.XISX	May 30, 2017	37Kb	View
PageUp EEO ReportTemplate (3).xlsx	Nov 14, 2017	488Kb	View
Search Committee Outcome Template	Dec 21, 2018	296Kb	View
selection report for madison.docx	Feb 5, 2018	25Kb	View
Test EEO Report Template	Nov 9, 2017	37Kb	View
UW Applicant EEO Template	Feb 6, 2019	191Kb	View
UW-Madison Template (Multi-Answer)	Mar 14, 2018	38Kb	View
Offer Letter Attachments (4)			

Name	Date	Size	
selection report for madison.docx	Feb 5, 2018	25Kb	View
Test EEO Report Template	Nov 9, 2017	37Kb	View
UW Applicant EEO Template	Feb 6, 2019	191Kb	View
UW-Madison Template (Multi-Answer)	Mar 14, 2018	38Kb	View
Offer Letter Attachments (4)			
Academic Staff Policies and Procedures (ASPP)	Jan 23, 2020	451Kb	View

The screenshot shows a 'Message from webpage' dialog box. It contains a question mark icon and the text: 'To perform this action the offer card must first be saved. Do you want to save the offer card now?'. At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a yellow border.

2. Select the additional documents needed. And click Merge.

The screenshot shows the 'Document library' section of the interface. It contains a table with columns for 'Name', 'Date', and 'Size'. A red arrow points to the 'Offer Letter Attachments (4)' folder, which is highlighted in yellow.

Name	Date	Size	
selection report for madison.docx	Feb 5, 2018	25Kb	View
Test EEO Report Template	Nov 9, 2017	37Kb	View
UW Applicant EEO Template	Feb 6, 2019	191Kb	View
UW-Madison Template (Multi-Answer)	Mar 14, 2018	38Kb	View
Offer Letter Attachments (4)			
Academic Staff Policies and Procedures (ASPP)	Jan 23, 2020	451Kb	View

3. To attach the Offer Letter and any additional documents you wish to include, click on Add document.

The screenshot shows the 'Offer documents' section of the interface. It contains a blue header with the text 'Documents attached to the offer appear in the section below.' Below this header are two buttons: 'Add document' and 'Merge document'. The 'Add document' button is highlighted with a yellow border.

4. The 'Upload a new document' screen populates.

5. Click on Upload file and select the offer letter from your computer. The document category will default to Offer Contracts – do not change the document category. Only documents in the category of 'Offer Contracts' are viewable by the selected candidate within their applicant account.

Enter a title for the document in the 'Title' field (This is the name of the document that the recipient will see. It is a good practice to use a specific title that will make sense to the recipient. This can be different than the actual file name.) Once you have selected and titled your document, click on 'Save and close.' If you have additional documents, click on 'Save and add another.'

6. Review the documents listed in the Offer documents section. Ensure these are all the documents you want the individual to receive. If you want to review the document to double-check it is correct, click on View. The 'Delete' button will remove the document.

Document	Date	Size	Category	
Ross Gellar Offer Letter	Nov 10, 2021	11Kb	Offer Contracts	View Delete

7. Once you have completed the Offer Card, choose your division's approval process from the dropdown list.

The screenshot shows a form titled "Approval process". The "Originator:*" field contains "ERICA FINI-MARTEN" with a search icon and a dropdown menu showing "Email address: FINIMARTEN@WISC.EDU". The "Approval process:" dropdown menu is set to "None".

8. The approval process for your division will automatically populate. Fill in the name(s) of the required approver(s) by clicking on the search icon.

The screenshot shows the "Approval process" form with the dropdown menu set to "A07 - CALS". Below this, there are two sections for approvers: "1. Department Approval:" and "2. Division HR Approval:". Each section has a search field and a dropdown menu showing "No user selected.".

9. Once you click Save you will receive this message. Click OK if you want to initiate the approval process.

The dialog box contains a question mark icon and the following text: "You have selected the 'A07 - CALS' approval process. If you continue, this approval process will be initiated immediately." At the bottom, there are two buttons: "OK" and "Cancel".

10. After clicking the 'Ok' button, you will be redirected back to the offer card.

✔ Changes have been saved

Ross Geller (Ross) [Revision history](#)

Personal details

Address: 951 Central Park Ave
Madison, Wisconsin
53715, United States Phone: 9876543214

E-mail: DrRossGeller@gmail.com

Applicant number: 57395

[View profile](#)

Job details

Posting Title: **ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS).**

Division: A07- DIV-COL OF AG & LIFE SCIENCES

Department: DEPT-A0708

Site: -

Work Type: Staff-Full Time

Offer details

Approval status: Pending

Hiring Manager: A02/A03 Division HR

Date entered: Jan 22, 2020, 2:18 pm

Date updated: Feb 24, 2022, 8:32 am

Application source: Internet - Chronicle of Higher Education [Edit](#)

Positions:

Position no	Type	Applicant	Application status
<input checked="" type="radio"/> TRAIN81707-US	New	Ross Geller	Verbal offer

[Save and close](#) [Save](#) [Remove Offer](#) [Cancel](#) [Approve](#) [Decline](#)

If you are the department approver, click the 'Approve' button. This action will send an automatic communication to the Division Approver to approve or decline the offer.

Click on 'Save and close.' An automatic communication will be sent to the approver(s) to approve or decline the offer.

If you are the division approver, you can access the offer from your dashboard by clicking on the 'Offers awaiting your approval' link.

The screenshot shows the PageUp dashboard with a dark blue header. The main content area is divided into sections. On the right side, under 'Manager Activities', there are two items: 'Jobs requiring panel review' with a '1' in a green circle, and 'Offers awaiting your approval' with a '2' in a red circle. The second item is circled in red.

11. Click on 'View' to review the offer card.

Offer created	Applicant name	Originator name	Job title	Job number	View
Feb 23, 2022	Ross Geller	ERICA FINI-MARTEN	ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS)	TRAIN81707-US	View

12. The offer card will appear in a pop-up window. Review the details entered on the offer card. If changes need to be made, click on the 'Decline' button to send the offer back to the department level for edits. Once the edits are complete, the department will re-initiate the approval process. If the details are approved, click the 'Approve' button.

Ross Geller (Ross) [Revision history](#)

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Job details

Posting Title: **ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS)**

Division: A07- DIV-COL OF AG & LIFE SCIENCES

Department: DEPT-A0708

Site: -

Work Type: Staff-Full Time

Offer details

Approval status: **Pending**

Hiring Manager: A02/A03 Division HR

Date entered: Jan 22, 2020, 2:18 pm

Date updated: Feb 23, 2022, 2:14 pm

Application source: Internet - Chronicle of Higher Education [Edit](#)

Positions:				
Position no	Type	Applicant	Application status	
<input checked="" type="radio"/> TRAIN81707-US	New	Ross Geller	Verbal offer	
<input type="radio"/> TRAIN81707-US	New	Bucky Badger	Verbal offer	

POSITION DETAILS

HOW TO: REOPEN THE OFFER CARD

There may be times you need to get back into the offer details and make changes after the offer card has been saved or approved. To get back into the offer card, open the applicant card and click on the Offer incomplete link. **DO NOT change the applicant's status back to 'Verbal offer' to reopen the offer.**

Ross Geller ●
View profile Add flags

Address: 951 Central Park Ave, Madison, Wisconsin 53715, United States
Phone: +1 9876543214

E-mail: DrRossGeller@gmail.com
Number: 57395

Original source: Chronicle of Higher Education
e-Zines comms hold: No

Applications History CRM Resume

TRAIN81707-US - ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS)

Date submitted	Applied via	Status changed	Offer	Resume	Form
Dec 23, 2019	Chronicle of Higher Education	Feb 4, 2020 Verbal offer	Offer incomplete	View	View

HOW TO: SEND THE OFFER

Only when the offer card has been approved and negotiations are finalized, you are ready to send the offer to the candidate.

1. Open the applicant card and change the status to Online offer made and click on Next.

Ross Geller ●
View profile Add flags

Address: 951 Central Park Ave, Madison, Wisconsin 53715, United States
Phone: +1 9876543214

E-mail: DrRossGeller@gmail.com
Number: 57395

Original source: Chronicle of Higher Education

Applications History CRM Resume

TRAIN81707-US - ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS)

Date submitted: Dec 23, 2019
Applied via: Chronicle of Higher Education

Change application status - PageUp People - Internet Explorer
https://adminuat.dcl.pageuppeople.com/beta/v5.3/provider/manageApplicant

Change application status

- Does not meet minimum qualifications
- Search committee review
- Hiring Manager review
- Phone screen
- Phone Screen Accepted
- Phone Screen Declined
- Interview
- Interview 1 accepted
- Interview 1 declined
- Interview 2
- Interview 2 accepted
- Interview 2 declined
- Interview 3
- Interview 3 Accepted
- Interview 3 Declined
- Reference check
- Verbal offer
- Background Check
- Background check successful
- Offer accepted**
- Offer declined
- JEMS new identification form paperwork complete
- Withdrawn
- No longer considered
- Cancelled
- Submitted
- Incomplete
- Rescind Offer

Save Next > Cancel

Creating and Sending the Offer

- 2. This will bring up the template communication that will be emailed to the selected candidate. This template uses merge fields that automatically include the job title, number, your name and email address. You can also choose to customize the message and include additional users from the Job. Once the communication is set, click on Move now to send the email to the applicant.

E-mail: Applicant: Yes No

From:*

Subject:*

Message: Merge fields

B *I* U **S** Formats - **A** - - -

 **JOBS AT UW**
University of Wisconsin-Madison

Ross,

As a follow-up to our conversation, this email provides instructions on how to view and accept your offer documents for the position of ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INTL PROGRAMS), TRAIN81707-US, at the University of Wisconsin-Madison.

In order to view your offer documents, which outline the terms and conditions of your employment, please follow the steps below:

1. Go to the University of Wisconsin-Madison's jobs website at <http://jobs.wisc.edu> and log into your applicant account. If you have forgotten your password, please click on the 'Forgotten your password' link. A new password will be generated and sent to the email address associated with your account.
2. At the top of the screen you will see a yellow bar. Click on the 'View Offer' link to review your offer documents.
3. Open and review your offer documents before accepting or declining your offer. You must open and review each document in order to accept your offer.
4. Once you have opened and reviewed all documents, close the documents to return to the previous screen. Click the 'I have read and agreed to the terms of the offer' box.
5. If you agree with the details of the appointment letter, please click on the 'I accept' button. Click on the 'I decline' button if you are no longer interested in this offer.
6. Once you indicate your online acceptance, you will be directed to the 'New Employee Details' form. Please fill out the details of the form accordingly. This information is collected to set up your appointment and is kept secure and confidential.

If you need additional information or have questions, please contact me at FINIMARTEN@WISC.EDU.

Thank you,

Additional users from Job: Yes No

Additional users from Job

<input checked="" type="checkbox"/> Hiring Delegate (optional)	<input type="checkbox"/> Hiring Administrator
<input type="checkbox"/> Recruiter	<input checked="" type="checkbox"/> Reporting to Manager
<input type="checkbox"/> Chairperson	<input type="checkbox"/> Search committee member

Additional users from Offer

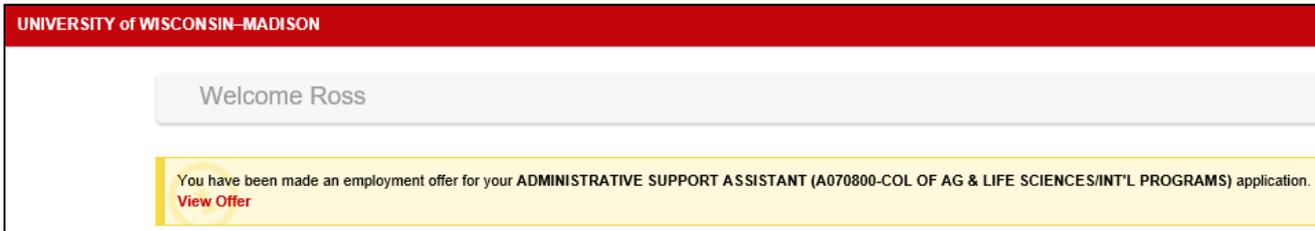
<input type="checkbox"/> Hiring Delegate (optional)	<input type="checkbox"/> Hiring Administrator
<input type="checkbox"/> Reporting to Manager	

Other additional users

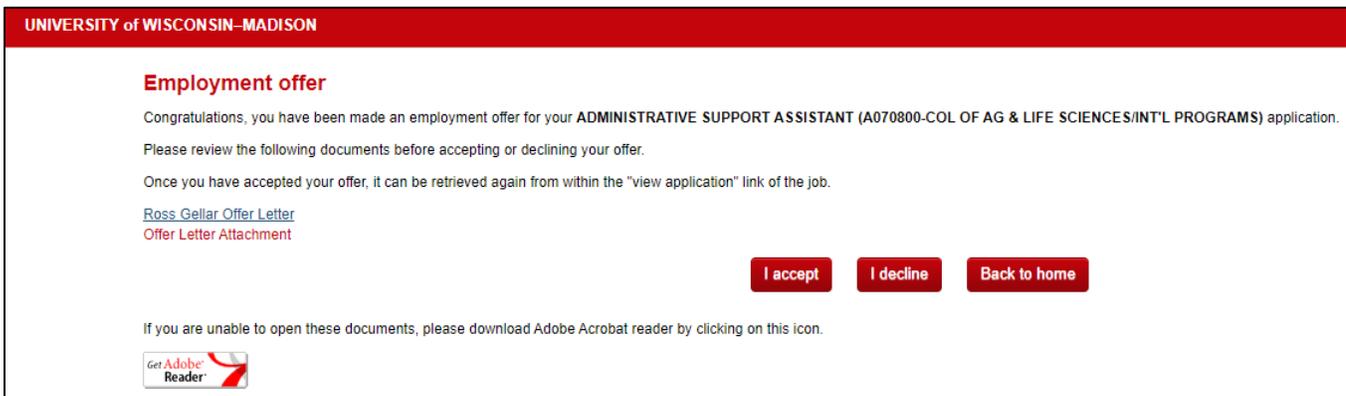


HOW THE CANDIDATE ACCEPTS THE OFFER

1. The selected candidate will log into their account to accept or decline the offer, as well as review all documents, by clicking on View Offer.



2. The selected candidate **must** open each document and click the box, "I have read and agreed to the terms of the offer" before the 'I accept' button will be available to select.



3. Once the offer is accepted or declined, you will receive an automated communication notifying you of the offer's status.



4. When the candidate accepts the offer, they are immediately redirected to the New Employee starter form. Some information from this form flows into JEMS Hire.

5. You will receive a communication when the candidate has completed the New Employee starter form. **You must wait until the new starter form information flows into JEMS Hire to finish making the hire!**

{FIRSTNAME} {LASTNAME} has completed the new employee identification form for the position of {JOBTITLE}, {JOBNO}.

The data will be transferred into JEMS Hire within one hour of receipt of this email. Once the data is in JEMS Hire, please finish processing the hire into HRS as soon as possible.

Note: This email is sent to the Division HR, Hiring Administrator, and the Hiring Delegate. Please forward to the individual responsible for entering the hire, if applicable.

Thank you.

This is an automated message from the Talent Recruitment and Engagement Management System (TREMS).