LSU Health NEW ORLEANS
Office of Human Resource Management

Job Aid: Creating an Offer Card in PageUp

- **What is an Offer Card?**
  The offer card is a request to make an offer to your selected candidate. Users who have the *Department* or *School/Division* Permission group can create offer cards. This is similar to the *Hiring Proposal*.

- **What information is needed to create an offer card?**
  Offer cards have 9 sections. Required fields are designated by an asterisk. **You will not be able to submit until these fields are completed: Start Date, Candidate Qualifications, Onboarding form, Onboarding workflow, Onboarding delegate, Originator, and Approver.**

  1. **Current or Previous Employee**: If this is a current or past employee, search for their name
  2. **Offer Details**: If you are recruiting multiple positions, you can select which one this candidate will fill
  3. **Position Details**: Anticipated start date, end date for temporary roles like a POA, and hours per week
  4. **Salary**: Enter requested salary, percent of effort, funding information, and any notes. Compensation enters the recommended HR range, and the School/Division approver enters the approved amounts.
  5. **Candidate Qualifications**: verify that the candidate meets the minimum quals and LAHEFSA status
  6. **Onboarding**: You will select the features for electronic onboarding in this section.
     - Onboarding Form: All employees will receive the Biographical Data Form
     - The Onboarding Workflow: Select the workflow based on the employee type
     - Department Onboarding Delegate: User who will monitor the employee's progress and assist in their onboarding. This can vary by department and could be the manager, business manager, or other administrative support role.
     - HR Onboarding Contact: Unclassified Offers: Tannia Jacob; Faculty and Other Academic Cristina Guillory
  7. **Offer Progress**: You won't make any changes to these fields. The system will update based on the candidate's response.
  8. **Documents**: Offer letters and other documents that the candidate needs to receive with the offer can be attached here. PageUp is configured to offer a Docusign option. Docusign will be utilized for the acceptance page and drug screening consent forms the TA/OPS team will add to the offer card after hiring department has obtained acceptance and update status to *accepted, signed offer letter uploaded*.
  9. **Approval Process**: The originator is the user completing the request, and should be able to answer questions about the request. The approval process allows you to send the request for the required approvals.

- **What is the Offer Card Approval Process?**
  The Approval Process is a flexible way to add your approvers to the form. It is the submitter's responsibility to enter the appropriate approvers for their department and school. If an error is made, reach out to HRM for assistance to have it corrected. When you submit, the approvers will receive an email prompting their review.

Approvers have two options. They can approve the request, which will send the request on to the next approver, or decline, which stops progress. The Originator will receive a message with the reason for the 'Decline.'

- The **Unclassified Staff Process** will prompt you to add in the approvers for your department and school/division and pre-populate with compensation and the Sr. Vice Chancellor's designee.
- The **Faculty, Fellows, Other Academic Approval Process** will prompt you to add in the approvers for your department and school/division and pre-populate with compensation and the Sr. Vice Chancellor's designee.
- The **Classified Approval Process** Is used exclusively by the HRM office to process offers for classified employees.

- **How does the hiring team send the candidate the offer letter?**
  When the selected candidate's offer card has been fully approved (with LAHEFSA approval for research positions) the hiring team should discuss the offer with the candidate, including approved salary, realistic start date, and next steps.

  When the candidate has given verbal acceptance, any updates to the offer card should be made, including attaching any additional written approvals.

  Obtain the hiring manager's signature on the letter. Then send the candidate the offer letter via email, mail, or in person to sign.

  Once the candidate has signed the offer letter, attach the signed copy to the Offer Card and change the status in PageUp to "**accepted, signed offer letter uploaded**".

  Talent Acquisition and Operations Team will update application status to 'Forms available for candidate to e-sign.' When the application status is updated, the candidate will receive an email, including a link inviting them to review the document.

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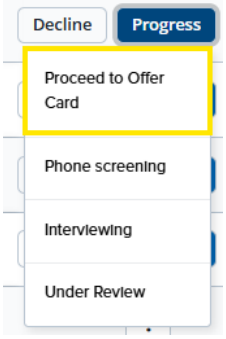
Job Aid: Initiating an Offer Card in PageUp

Initiate the Offer Card

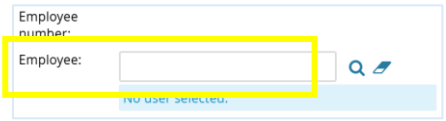
Pick 'Proceed to Offer Card' in the Progress' menu. Next, click on the candidate's name to open the applicant card. Click on 'Create Offer'.



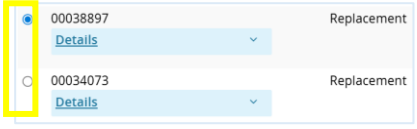
Complete the Offer Card

Carefully complete each section of the offer card. The HR recommended range can only be completed by HR, and the final approved salary amounts can only be completed by the School/Division permission group.

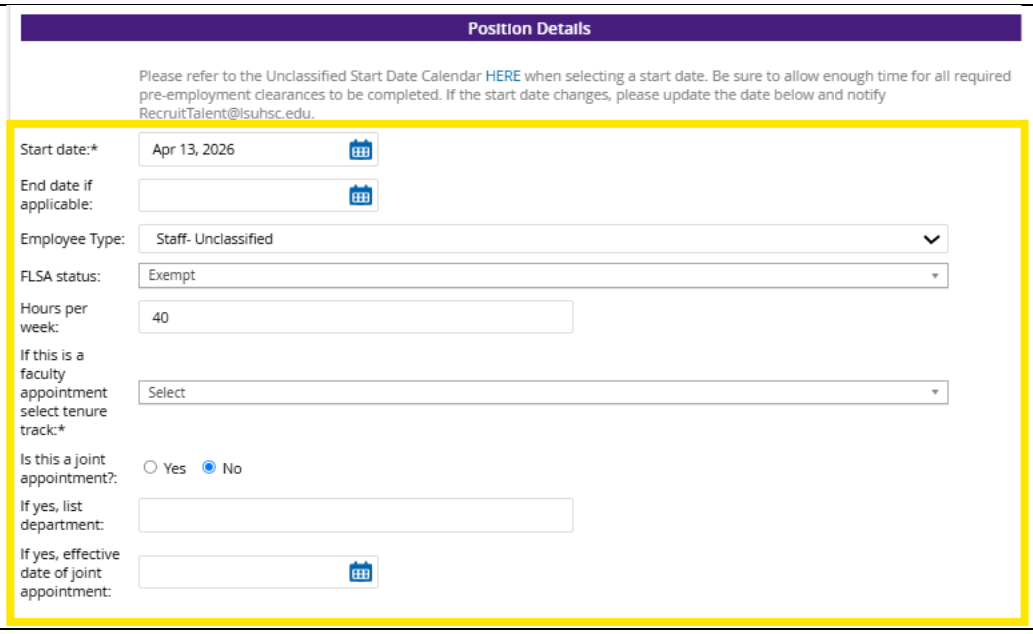
- If the candidate is a current or past employee, search for them using the magnifying glass. This is an important step to avoid creating duplicate account.



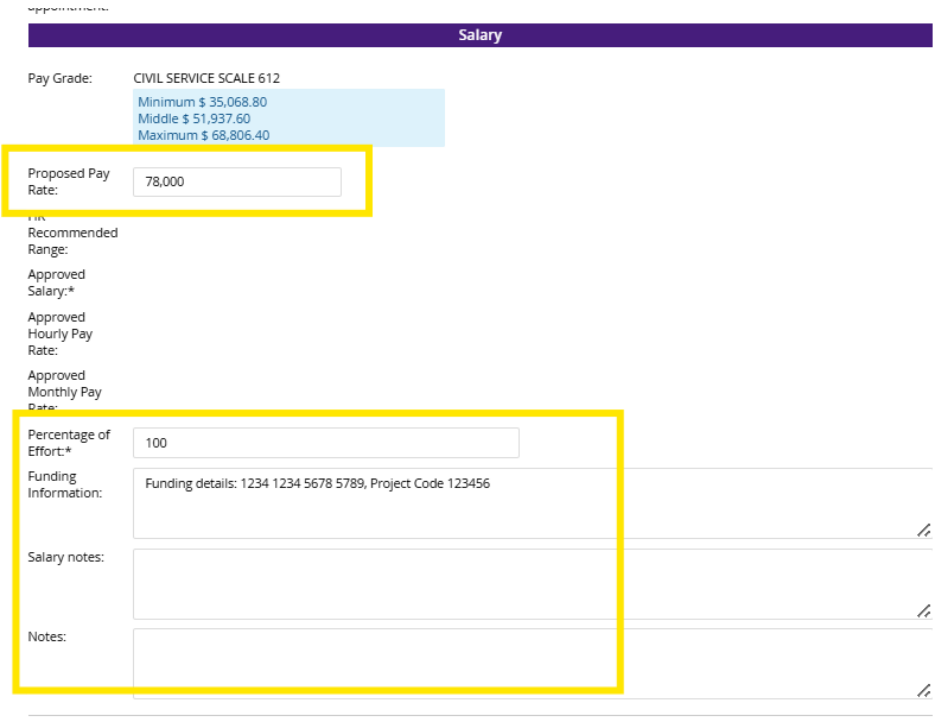
- If you are recruiting to fill multiple vacancies you'll see each position number listed. Select the position you want to fill by selecting the radio button.



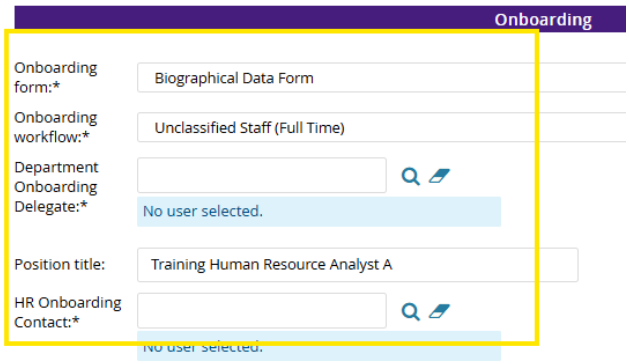
- Complete the Position details section. Utilize the unclassified start date calendar to select the start date. Select Faculty Appointment Tenure Track and indicate if it's a joint appointment.



- Enter the proposed pay rate, percentage of effort, funding information and any salary notes for approvers to review in the Salary section. School/Division Budget Approvers will enter the approved salary once routed to them. Compensation enters the HR recommended Range for Staff Positions.

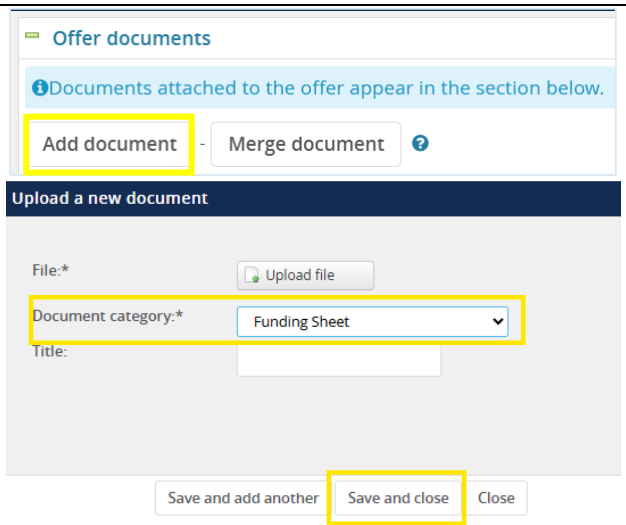


- All employees will complete the 'Biographical Data Form.'
- Select the Onboarding workflow based on the type of position. This will determine what tasks will appear in the employee's onboarding portal.
- Department Onboarding Delegate is responsible for monitoring the employees' progress through their onboarding.
- HR Onboarding Contact monitors onboarding progress. Tannia Jacob for all Unclassified, Cristina Guillory for all Faculty.



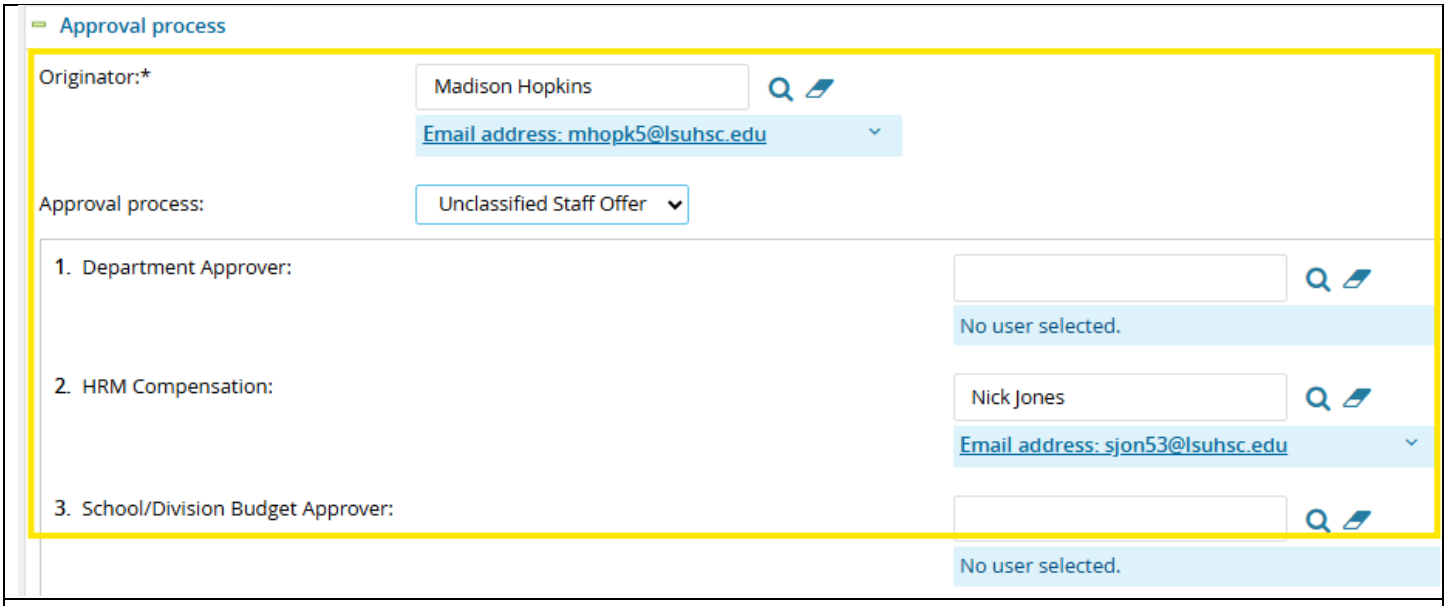
Add Documents

Select 'Add Document' to upload documents that will be visible for the approvers, for example: funding sheet, draft of offer letter, etc. Reference your matrix, to verify required documents by your school/division.



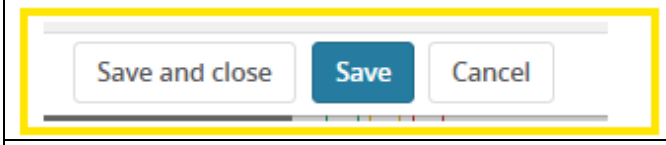
Add the Originator and select the Approval Process

The originator is the person completing the offer card and will receive offer updates. The approval process is determined by the type of position you are filling.



Save and Submit

To initiate the approval process select *Save* or *Save and Close*. Approvers will receive email communication.



Once the offer card is approved, reference **Job Aid: Managing Offer Letters in PageUp** for next steps.