Offering a Job & Onboarding

University of Wisconsin Oshkosh

Revision History

Date	Revision
August 28, 2020	Misc.

Introduction

The Office of Human Resources has implemented this system in order to automate all tasks relating to the recruitment process for all ppositions on campus. This system will **not** house student positions. This training manual focuses on the following actions in PageUp:

1. Create/edit/approve an electronic offer of employment
2. General onboarding/orienting a new hire

The Employment Application System is designed to run in a web browser over the Internet. The system supports browser versions of Chrome, Firefox, Internet Explorer 5.5 or above, for optimal results Internet Explorer 8 is suggested. The system also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com. To ensure the security of the data provided by applicants, the system will automatically log you out after 120 minutes of inactivity. However, anytime you leave your computer we strongly recommend that you save any work in progress and log out of the system by clicking on the Logout link located on the top right side of your screen.

Access Within the System

Each user on campus has been categorized into a particular user group, which provides them certain permissions in the PageUp system. Please see below for a brief overview of access granted to different types of users for the actions covered in this guide.

Role	Access Level
Dean's/Directors	Review/approve offer components; view positions
Hiring Supervisors	View positions; view applicants; create/edit electronic offers; manage/manipulate onboarding module for new hires
Administrative Support/Search Assistants	View positions; view applicants; create/edit electronic offers; manage/manipulate onboarding module for new hires

Modes of Training

The recruitment team in the Office of Human Resources understands that every individual has a different learning style. Please see below for the various modes of training offered on this piece of the PageUp system:

Training videos posted on: **http://hr.uwosh.edu/recruitment/**

If you would like to have a member of the recruitment team walk you through the offer process over the phone, please call the Office of Human Resources at 920-424-1166 and schedule a time for this phone call.

If you feel comfortable solely using this training guide to create your offer of employment, this is acceptable. Please know that a member of the recruitment team may reach out to you if there are any follow up items up for discussion.

Homepage Tips

When you log in to PageUp, you should see a homepage looking similar to this one. Familiarize yourself with the options on this page.

My Dashboard

Welcome Harry, this is your Dashboard where you will see all your tasks organized in various stages.

Job description

My position description - Under review

Manage position de...

New job

0 Jobs open

10 Team jobs open

New job

Approvals

0 Jobs awaiting your approval

0 Approved

Advertisements

0 Advertisements

Applications

0 Jobs have applicants for review

0 Applicants assigned to you for review

Search committee review

0 Jobs requiring panel review

Interviews

0 Scheduled interviews

Offers

0 Offers awaiting your approval

0 New hires

0 New hire tasks

PageUp

On the top left side of the homepage, click here to expand your **action menu**. This will be helpful to have expanded at all times.

When your action menu is expanded, you have access to all items listed on the homepage, regardless of what page you're currently viewing.

Search
Employee search
Applicant search
Talent search

Dashboard
New task
Dashboard
CRM Dashboard

Jobs
New job
My search committee jobs
Manage jobs
My jobs
My sourced jobs
My job approvals
Manage forms
Manage position descripti...

Applicants
New applicant
Manage applicant pool
Manage applications
My applicants
Shortlisted applicants
Manage offer approvals
New new hires
My new hire tasks
Manage reference check r...

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Initiating an Electronic Offer

Step 1: Receive search committee recommendations, decide on a final candidate

The search and screen committee should provide the hiring supervisor with their final recommendations by moving applicants into the **Search Committee Recommends for Hire** status or **Search Committee Does Not Recommend for Hire** status as well as providing the hiring supervisor with job-related strengths & weaknesses for each candidate interviewed on campus. The hiring supervisor must review which applicants sit in which status and make a decision as to which candidate to offer the position. If the hiring supervisor is interested in offering the position to a candidate that was **not** recommended by the search and screen committee, they must prepare a written justification as to why they want to offer the position to the particular candidate. Once the hiring supervisor has decided which candidate they would like to hire, they must log into PageUp to formally request the components of their offer. **This electronic offer request must be completed and approved BEFORE an offer is verbally made.**

Step 2: Log into PageUp

To log into the PageUp system, you may follow the link below:

Oshkosh.pageuppeople.com

Your username and password is pre-set as your **NetID**, which you use to log into multiple systems on campus.

Step 3: Navigate to the applicant you plan to make the offer to

Click **Manage Jobs** on the right side action menu. All jobs connected to you should be listed. Find the job you will be making an offer for by using the filters on the header bar, or by using the search tools on the top right side of the page.
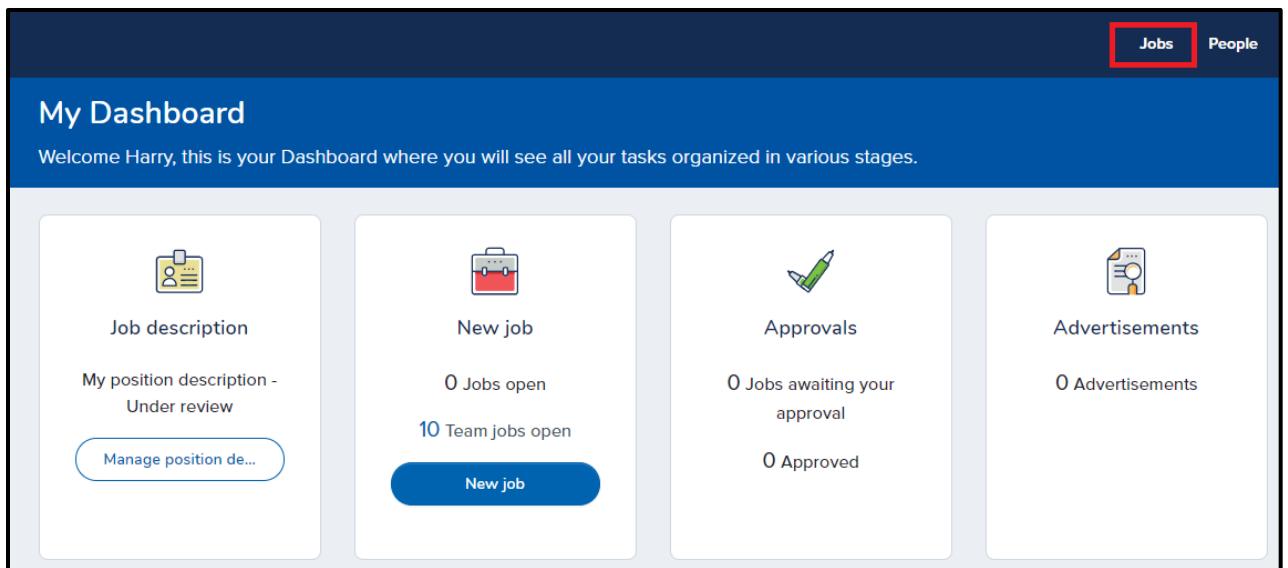
Once you find your job, click on the **number of applications**. This will bring you to a list of all applicants for the position.

Job No.	Date created ▲User	Title	Area	Department	Status	Applications
494315	23 Jan 2017 RHR	ℹ️▽ HR Generalist 2	F28 - Adm		Approve	1

Find the applicant you intend to offer the position to. You may sort the list of applicants by clicking on any of the labels on the header of the page. To change the applicant's status and initiate the offer details, click on the **status** of the application.

A box will appear where you are prompted to change the status of the application. Select **Request offer approval** and click **Next**.

You will be directed to a page where the system will document your updates. There is no need to select a communication template. Select **No** when asked to **E-mail Applicant**.

Click **Move now**.

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You will now be directed to complete the **offer card**. This is a form in the system that will allow you to make requests for the offer you will eventually make.

Step 5: Complete the offer card fields

<mark>Warning</mark>: The information entered into the fields on the offer card will eventually be merged directly into the official contract/offer letter. The accuracy of this information is very important. You will notice that certain fields will be pre-filled based on the information gathered in the beginning of the process. Please complete all applicable fields of the offer card. (see below for helpful tips)

The **Position Openings** section prompts the hiring supervisor to select which position they would like to assign to the candidate once hired if they are hiring for more than one position. If there is only one position available, the system will default the selection to the sole position number available.

Estimate an **effective date** while considering the length of time you will need for the approval process and the time span where the candidate will need to give notice to a current employer.

An **end date** is necessary for any positions on a contractual basis, temporary positions, project appointments, limited appointments, etc. This information is required for the contract/offer letter.

Certain fields require specific formatting, which is stated directly below the open field, if applicable.

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Is doctorate required for position?:	○ Yes ● No
(If the doctorate is required and the candidate has not received it) What are the requirements for the degree and the expected completion date?:	
Will the candidate be a time approver?:*	○ Yes ● No
(if yes) Please list the individuals (not including students) that will be approved:	

If this position will serve as a time approver, please list the names of those current employees who will be reporting their time to this candidate. If you are not yet sure who will be reporting their time to the candidate, you must report this to the Office of Human Resources once it has been determined.

Applicable solely to Faculty positions, complete the details of the position in order for the contract to be generated. If it applies and you are unsure of the **Actual Salary**, leave this blank and the Office of Human Resources will calculate this during the approval cycle.

Faculty Positions Only	
Type of Appointment:	Select
College of:	Select
Academic Years of Appointment:	
	Example format: Fall 2017 to Spring 2018
Rank/Position Title:	Select
Base Salary:	
Actual Salary:	
Non-renewal notice period:	Select

Applicable solely to Instructional Academic Staff positions, complete the details of the position in order for the contract to be generated. If it applies and you are unsure of the **Actual Salary**, leave this blank and the Office of Human Resources will calculate this during the approval cycle.

Instructional Academic Staff Positions Only	
Type of Appointment:	Select
College of:	Select
Contract Period:	Select
Academic Years of Appointment:	
	Example format: Fall 2017 to Spring 2018
Base Salary:	
Actual Salary:	

Applicable solely to Non-Instructional Academic Staff positions, complete the details of the position in order for the contract to be generated. If it applies and you are unsure of the **Actual Salary**, leave this blank and the Office of Human Resources will calculate this during the approval cycle.

Non-Instructional Academic Staff Positions Only	
Type of Appointment:	Select
Term of Appointment:	Select
If academic year please provide dates:	
	Example format: Fall 2017 to Spring 2018
Base Salary:	
Actual Salary:	

You may use the **Additional Comments** section to justify any piece(s) of information provided on the offer card. You must also include any additional offerings you'd like to include in the offer, such as: moving reimbursement, start-up costs, housing, etc. This will be manually written into the contract/offer letter.

Additional Comments	
Additional Comments:	

The **Offer Progress** section provides an automated status update regarding whether the offer has been electronically accepted or declined by the candidate. Nothing needs to be entered/edited in this section, it simply serves as a status update.

Offer Progress	
The following fields will be automatically updated b	
Offer accepted:	○ Yes ⦿ No
Date offer accepted:	
Offer declined:	○ Yes ⦿ No
Date offer declined:	

Step 6: Assign users and approvers to the offer

On the bottom of the offer card, begin by assigning an Originator. The **Originator** should be listed as the person completing the offer card. This will instruct the system as to who should be updated once the offer has been fully approved.

Look Up   Clear

Approval process		
Originator:*	Shawna Kuether	🔍 ✎
	✚ Email address: kuethers@uwosh.edu	

Click on the binoculars to select the Originator from a list of all UWO employees.

Select the appropriate approval process:

Approval process: None ▼

- None
- Campaign Offer Card Approval
- COB Offer Card Approval Only (Campaign offers)
- COB Offer Card Approval Only (Non Campaign offers)
- **Position Offer Approval (all positions)**

Warning: The Human Resources and Budget Office approval fields will auto populate. Do **NOT** change the approvers in these fields.

Approval process:	Salaried Position Approval (all exempt positions) ▼		
1. Human Resources:	**Do not change**	HR Contracts	🔍 ✎
		✚ Email address: hrcontracts@uwosh.edu	
2. Dean/AVC/Director:			🔍 ✎
		No user selected.	
3. Budget Office:	**Do not change**	Budget Office	🔍 ✎
		✚ Email address: budgetoffice@uwosh.edu	
4. Human Resources:	**Do not change**	HR Contracts	🔍 ✎
		✚ Email address: hrcontracts@uwosh.edu	

Simply add the appropriate name into the Dean/AVC/Director or equivalent field and validate their name so that the green plus sign appears below the open field.

Step 7: Finalize and send offer card through approval process

Once you've completed all fields of the offer card, have assigned your Users and Approvers and have reviewed the offer details, click **Save**. This will initiate the approval process by sending instantaneous emails requesting approval from each approver, one at a time. The Originator of the offer card will be notified by email once all approvers have approved the offer. If an approver declines the offer approval request, the Originator of the offer card will be notified, including a justification as to why it was declined.

Step 8: Once offer request approved, verbally offer the position

Once you receive an automated email from PageUp stating that the position has been fully approved, review the offer card to understand what has been approved in case any updates have been made by the approvers. You may verbally offer the position to the proposed candidate.

Step 9: Once offer has been accepted, notify Office of Human Resources A.S.A.P. (recruitment@uwosh.edu or 920-424-1166)

Once an offer has been accepted, the hiring supervisor or administrative support staff **must** immediately notify the Office of Human Resources. This will allow HR to send a formal contract/offer letter right away to solidify the start date and request an electronic signature. Once the new employee has electronically accepted the offer of employment, they will be automatically redirected to the onboarding portal. The onboarding portal will provide them with necessary employment paperwork, a warm welcome to the campus community, and a list of general tasks that need to be completed within a particular timeframe to make for a smooth transition to the campus.

Using the Onboarding Module
Step 1: Access the onboarding portal

Once the new hire has electronically accepted the position, they will be directed to the onboarding portal, which is set up in a general fashion and can be edited or added to based on the department-specific needs. Tasks are assigned to the new hire to prepare for their first day, and to properly orient them once they are officially on campus. The guide below will walk through the process of adding tasks for the new hire to complete, as well as a few other action items.
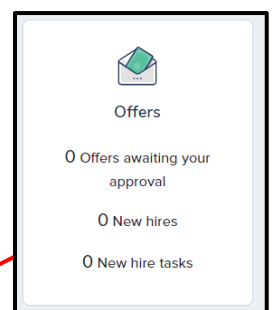
Click **New Hires** to access your new hires' onboarding portal.

Locate the candidate you are hiring. You may view the offer details from this page. To access the onboarding module, click **View all tasks** next to the new hires name.
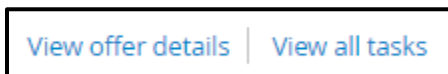
Step 2: Customize the onboarding tasks

The onboarding portal will have multiple onboarding tasks pre-populated by the Office of Human Resources. Many of these pre-populated tasks revolve around required employment paperwork. Do not delete these pre-populated tasks.

On the top right side of the onboarding page, you will notice an **icon key** for the action items included in the onboarding portal. Reference this key when making changes/additions to the onboarding tasks.
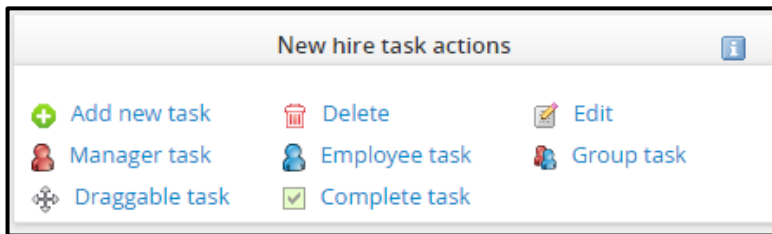
- Create a new task

As you can see, all onboarding tasks are separated into when they are due (before first day, first, day, first week, etc.). When creating a new task, you must decide when the specific task should be completed and click **Add new task** underneath that specific section.
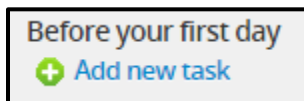
Label the task, and assign a date of when the task should be completed by. You may then describe the task in the Content section including the necessary details and links for the employee to successfully accomplish the task.


Disregard **Activity type**. Select whether the task needs to be completed solely by the new employee, solely by the hiring manager, or by both the new employee and hiring manager under **Task allocated to**.

You may also add the specific task to your favorites, which will allow you to re-use this task on different new hires.

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- Complete a task

To complete a task as a hiring supervisor, click the **title of the task**. Once the task has been opened, click **Mark as completed**.
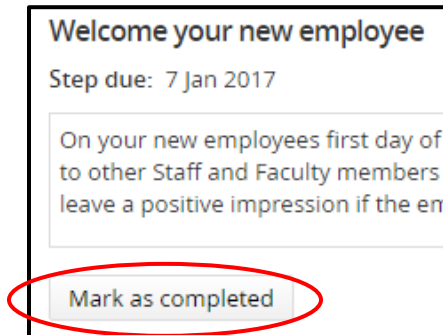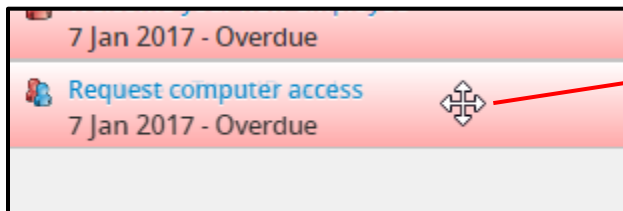

- Edit a task

To edit a task, click the **pencil** button next to the specific task. This will allow you to edit the title, group, date, deadline, content, and who the task is allocated to.
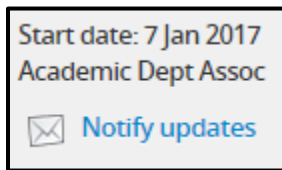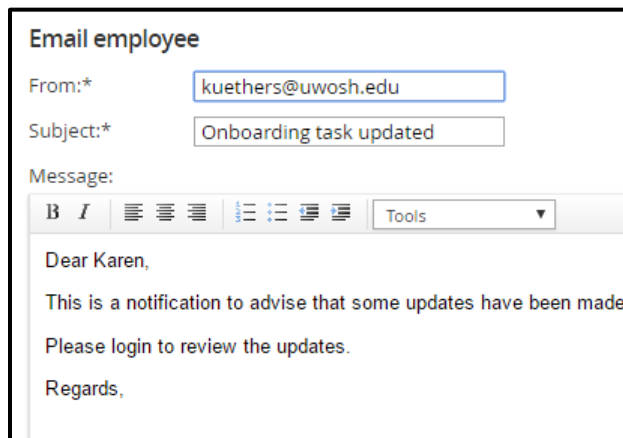
- Re-order tasks

To re-order tasks, **click and hold** on a task. Your cursor will turn into a cross-arrow icon and you may drag the task into a new location or group.

- Notify the candidate of updates to the onboarding workflow

On the top left side of the page, click **Notify updates**.

Start date: 7 Jan 2017
Academic Dept Assoc

✉ Notify updates

An email template will appear, which you may not modify. You may edit the email of the sender, if necessary. You may also change the subject line of the email. Once complete, click **Send**.

Email employee

From:* kuethers@uwosh.edu
Subject:* Onboarding task updated
Message:

B *I* ≡ ≡ ≡ ≣ ≔ ≣ ≣   Tools ▾

Dear Karen,

This is a notification to advise that some updates have been made

Please login to review the updates.

Regards,

- Filter tasks

You may filter tasks based on who the tasks are assigned to by clicking on one of the following buttons.

👤 Employee task list   👤 Manager task list   👥 All tasks
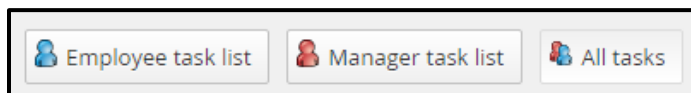
Although the position is now closed, the onboarding module will continue until all task time periods have passed. The new employee and hiring supervisor may log into the PageUp system at any time to access these tasks.