INITIATE AN OFFER TO CANDIDATE

1. From the Candidate Pipeline or your Inbox, enter **Hire** date. Please use bi-weekly faculty hire date schedule below when determining the hire date for your new faculty.

Details

Target Hire Date (Job Requisition)
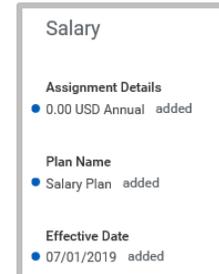06/11/2019

Hire Date ✱

Hire Reason

http://ntsppilot1.umsmed.edu/faculty/Guidelines/2019%20Bi-Weekly%20On-boarding%20Start%20Dates.pdf

http://ntsppilot1.umsmed.edu/faculty/Guidelines/2020%20Bi-Weekly%20On-boarding%20Start%20Dates.pdf

2. Click **Next**, then **Submit**.

PROPOSE COMPENSATION TO CANDIDATE

1. Enter correct salary amount in the **Salary** section.

Salary

Assignment Details
● 0.00 USD Annual   added

Plan Name
● Salary Plan   added

Effective Date
● 07/01/2019   added

2. In the **Comments** section, enter the Primary and Secondary Responsibilities of the candidate and any other information, such as specialty.

3. Click **Submit**.

REQUEST ONE-TIME PAYMENT

1. Click **Add** in the Payment section.

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One-Time Payment

Summary

Effective Date ★
07/01/2019

Employee Visibility Date

Reason

Total Amount Requested
0.00 USD

Payment

(Add)

2. In **One-Time Payment Plan** field, choose **All Plans** > **Recruitment Incentive**.

One-Time Payment Plan ★
[≡]

3. Do not change the **Scheduled Payment Date** if you want to process the recruitment incentive prior to the candidate's hire date.

4. Enter **Amount**.

5. **Uncheck** **Send to Payroll**. This request cannot be sent to payroll as the candidate has not yet been hired and payroll is unable to process through this method.

Send to Payroll
☐

6. Enter the **Cost Center**.

7. Enter any **Comments**, if necessary, such as an explanation if the incentive is higher than usual.

8. Click **Submit**. The HR Compensation Partner reviews and approves the request or sends it back with recommendations.

9. After Compensation approval, the DBA receives the offer letter for additional review.

OFFER LETTER PROCESS

1. The DBA opens the **Generate Document** offer and enters the applicable information and deletes irrelevant information. It is recommended to begin deleting the documents that are not applicable to the candidate from the top of the document.

Generate Document Generate Document for Offer (Default Definition): Faculty Offer

14 second(s) ago - Due 06/16/2019

Document Name   Faculty Offer

Document ★ [Format ∨ **B** *I* U A ∨ ☰ 🔗   ⤢]
The following documents in the faculty offer are considered contractual documents:
(DELETE DOCUMENTS THAT WILL NOT BE APPLICABLE TO YOUR CANDIDATE, THEN REMOVE THIS INSTRUCTION)
• Institutions of Higher Learning Employment Contract

(View PDF)

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2. Fill in all information with orange text. It is recommended that you print the document in the event you accidentally delete information and need an original copy.

3. Pre-populated fields can be altered to add credentials, change the date on the appointment letter, etc.

4. The following documents are included:
   - IHL Contract (if full-time, clinical and non-clinical)
   - Professional Service Addendum (if clinical and full-time)
   - Professional Service Agreement (if clinical and part-time)
   - Recruitment Agreement and Promissory Note (if receiving a one-time payment – recruitment incentive – clinical and non-clinical)
   - Restrictive Covenant (If applicable – only certain departments/positions have been approved by legal to include this document.)
   - Departmental Compensation Plan (if clinical - copy and paste)
   - Compensation and Other Terms Document (all paid faculty, full-time, part-time, clinical and non-clinical)

5. Click **Submit**. You may Save for Later to complete any edits at a later date. You will not be able to edit any information after you click submit. You will have to submit a new offer in order to edit any information.

6. The Office of Faculty Affairs (OFA) reviews the offer letter and applicable documents. The OFA does not have the ability to make changes or send the offer back. If the offer is incorrect, the OFA will contact the DBA with the necessary change(s) and request a new offer. If approved, the offer letter goes back to the DBA.

7. The DBA then receives the offer letter back and holds it until the Chair is ready for the offer letter to be sent directly to the candidate. When it is time, the DBA checks **I Agree** box, agreeing to the signature statement.

8. The DBA will receive a notification to reach out to the candidate and make sure they know to check their e-mail and anticipate receiving the letter.

9. The candidate will then receive an email notification with a temporary Workday login to complete an Inbox task to review and sign the offer letter.

10. The candidate then clicks the PDF of the offer to review. The candidate should contact the DBA with any

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questions or concerns about the content of the offer letter.

11. If candidate agrees, then they will click they agree to sign electronically in DocuSign and then will click **Start** to adopt their signature, and then click through the document to electronically sign and then click **Finish**. They will have the opportunity to type a comment or move to click **OK**.

12. The offer then goes electronically to the Office of the Vice Chancellor as an Inbox task for the Chief of Staff to review and sign on behalf of the Vice Chancellor.

13. Once the offer has been accepted, the DBA will receive an Inbox task to move the candidate forward to next onboarding steps.
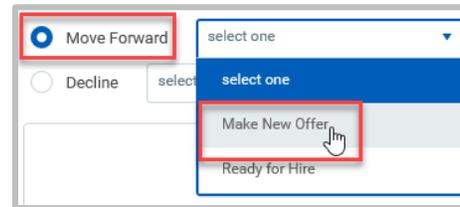
MAKE A NEW OFFER (IF NECESSARY)

1. From the **Search** field, type Cand: candidate name.
2. To the right of the candidate's name click **Actions**.

3. Select **Job Application**, then **Move Candidate**.
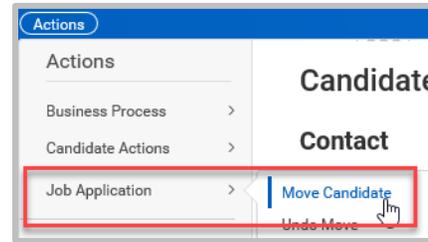
4. Under Move Forward, select **Make New Offer**. In the **Comments** section enter what information has been corrected. Click **OK**, then **Submit**.

5. In **Propose Compensation** enter a comment for Compensation regarding the changes.

6. Type **Skip for One Time Payment** if there are no changes.

7. After Compensation approves the offer, it will come back to the DBA to revise the new offer. Click **Submit**.

8. The OFA reviews the revised offer. If approved, the OFA clicks submit and the DBA receives the offer letter.

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