University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus
EMPLOYEE SERVICES

CU Careers: Step-by-Step Guide

Candidate Selection

This guide describes tasks you can perform now that an open requisition is posted to the career centers and candidates begin to apply. Refer to *Working with Requisitions Step-by-Step Guide* and *Posting and Unposting Jobs Step-by-Step Guide*, available from the Recruit & Hire page for more information about these steps.

Contents

Viewing and Updating Candidate Profiles

Every time you need to work with a candidate’s application, whether to send correspondence, review letters of recommendation, or progress a candidate further along the workflow, you will access the candidate profile and take action.

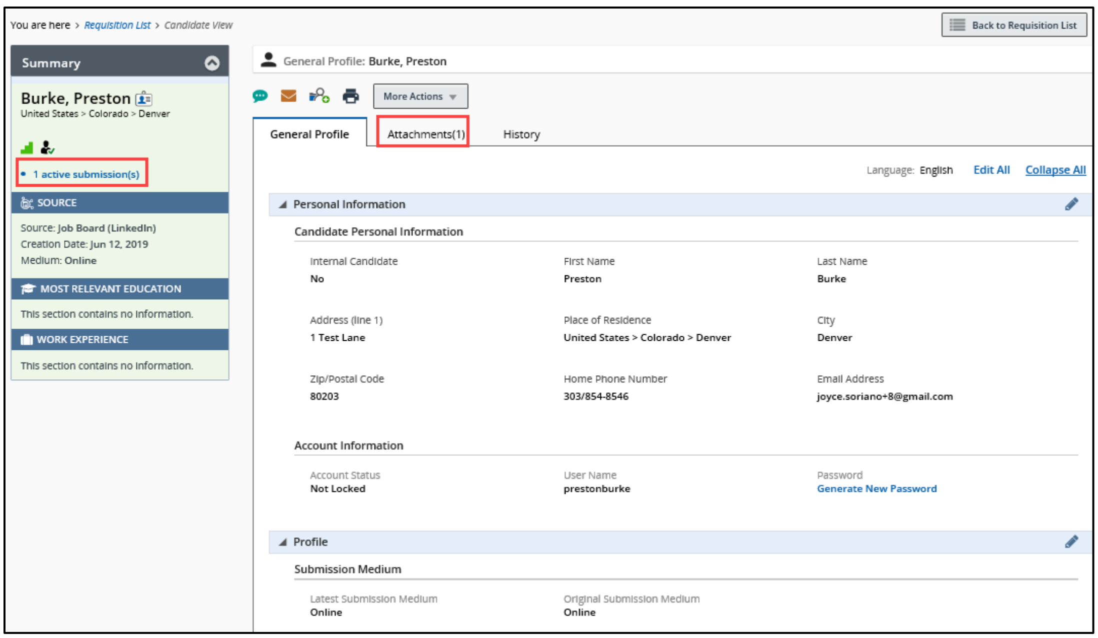
To view a candidate profile:

1. Enter the person’s name in the **Lookup a candidate** field at the top of the page.

   The candidate’s profile opens to the General Profile showing their address and phone information. You can edit a limited number of fields, if a correction is needed. The Attachments tab lets you view or upload documents, such as a resume or letters of recommendation.

2. If you want to see what requisitions the candidate has applied to, click the **active submissions** link in the Summary on the left. You can view only those submissions you have permission to view.

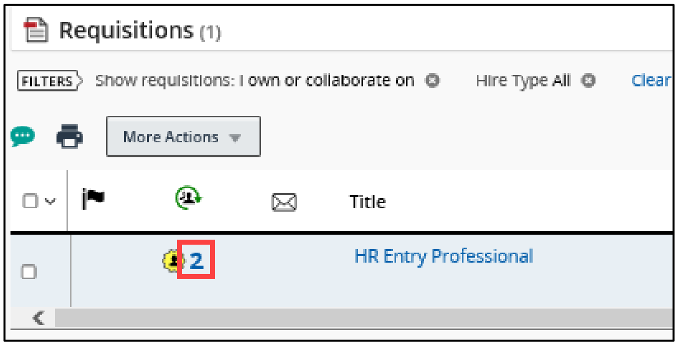
   

3. If you made changes, click **Done**.

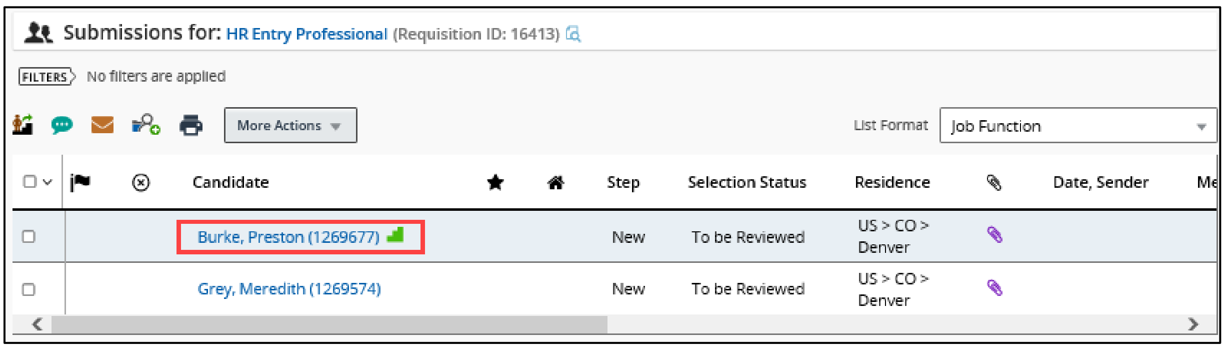
To view candidates that have applied to a requisition:

1. Click **Requisitions** from the navigation bar.

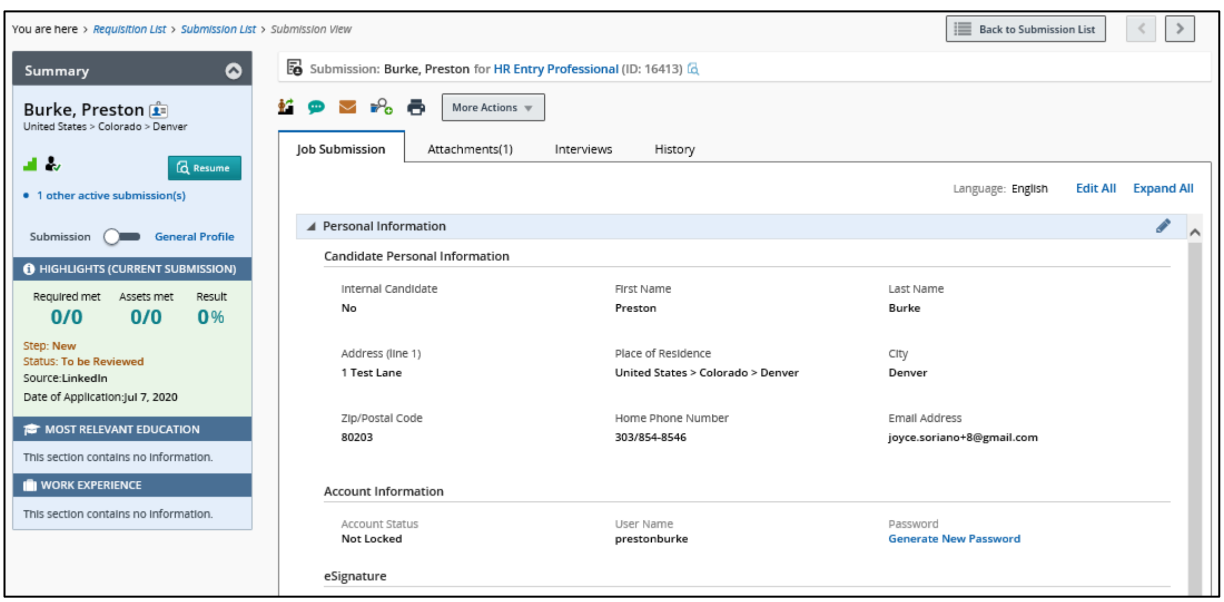
2. Click the numeral to the left of the requisition to view all candidates for the requisition.



3. Click the candidate whose profile you want to view.



The candidate's submission is displayed. The Summary on the left indicates the step and status of candidate in the candidate selection workflow for the current submission.



4. Click **Back to Submission List** (at the top) to return to the list of candidates for the requisition.

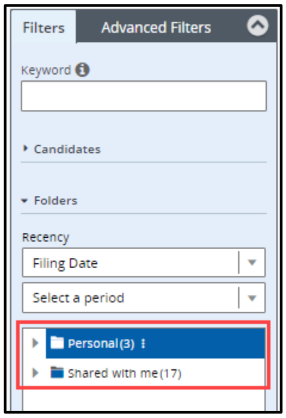
Creating and Sharing Candidate Folders

Folders can be used to store specific candidates for later use or to share with other users. Subfolders can also be created. When saving candidates to a personal folder, the candidate information is copied from the requisition and will remain in the original candidate list even after a position has been filled.

To create a folder for storing candidates:

1. Click **Candidate Pools** from the navigation bar. The Candidate Pools page appears.

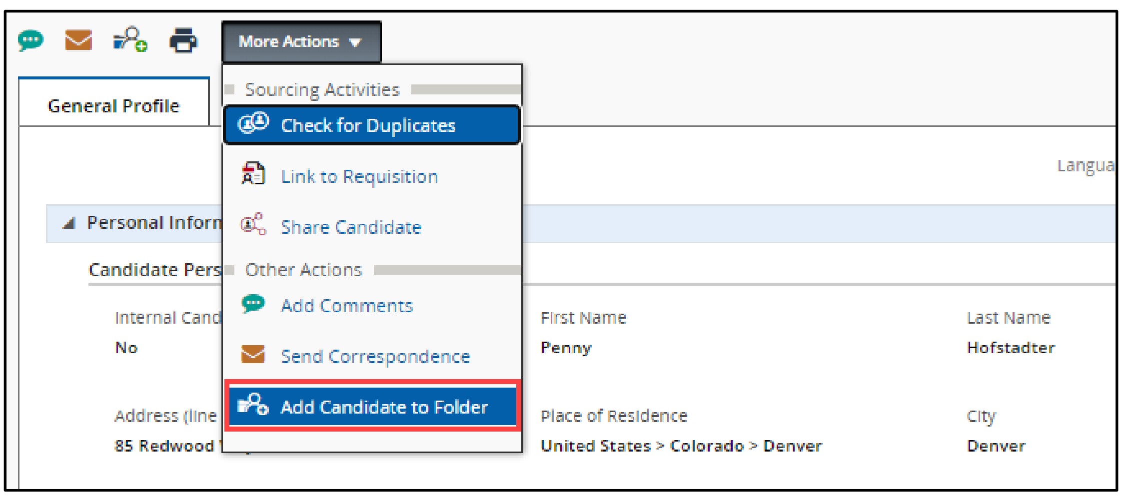
   From the Filters panel, you can see your folders:

   You can click a folder to view the candidates within it.

To add candidates to a folder:

1. Click a candidate name from either a pool listing or candidate list on a requisition.
2. Click **More Actions** and select **Add Candidate to Folder**.

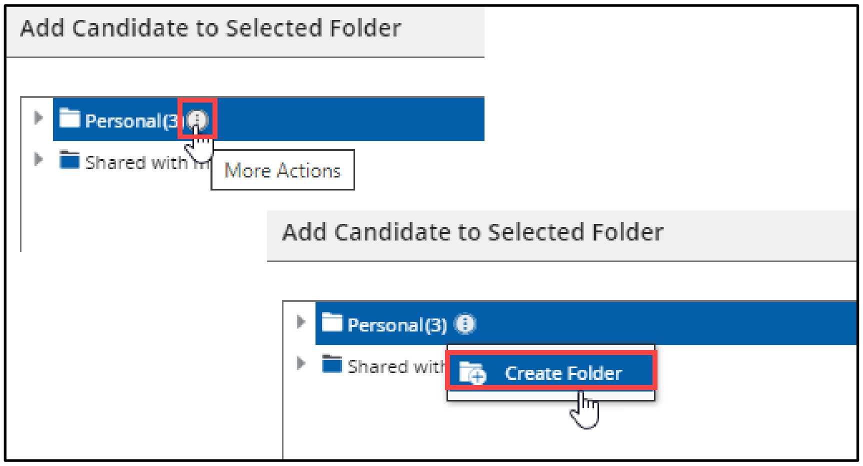
   

3. Select the folder and click **Done**.

To create a subfolder:

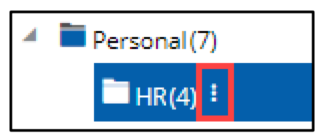
1. From the **Candidate Pools** tab, navigate to Folders under the Filters panel.
2. Click the folder name to display the More Actions menu icon. 

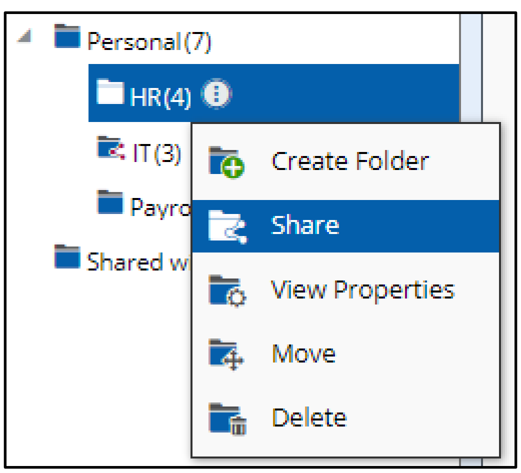
3. Click **More Actions** and select **Create Folder**.



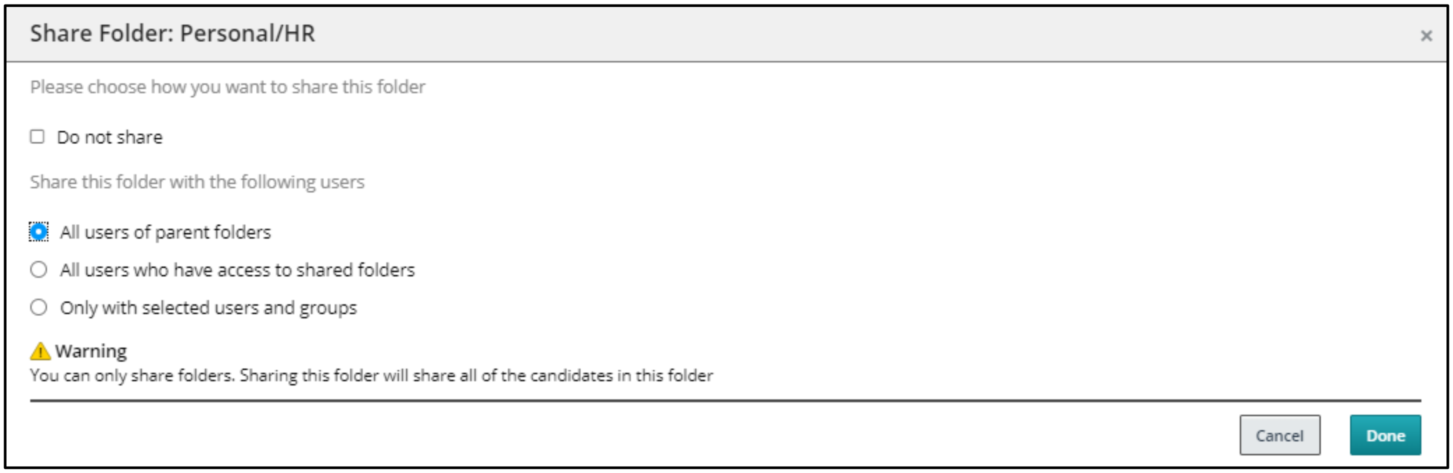
4. Enter a name for the folder and press **Enter**.

To share a candidate folder:

1. From the **Candidate Pools** tab, navigate to Folders under the Filters panel.
2. Select the folder you want to share and click **More Actions**. 

3. Click **Share**. 

4. Select sharing options and users.

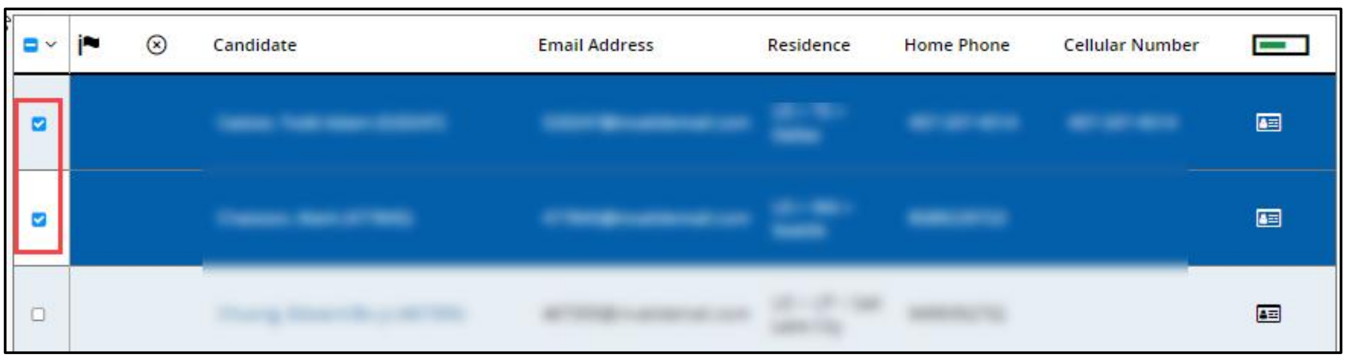


5. Click **Done**.

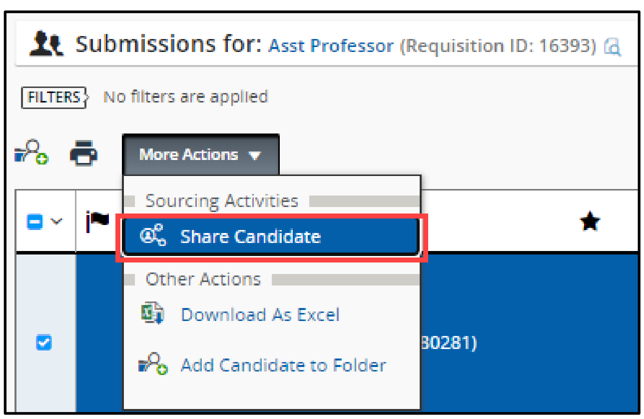
Sharing Candidates

To share candidates with other users:

1. From a candidate folder or requisition, select the checkboxes of candidates you want to share.

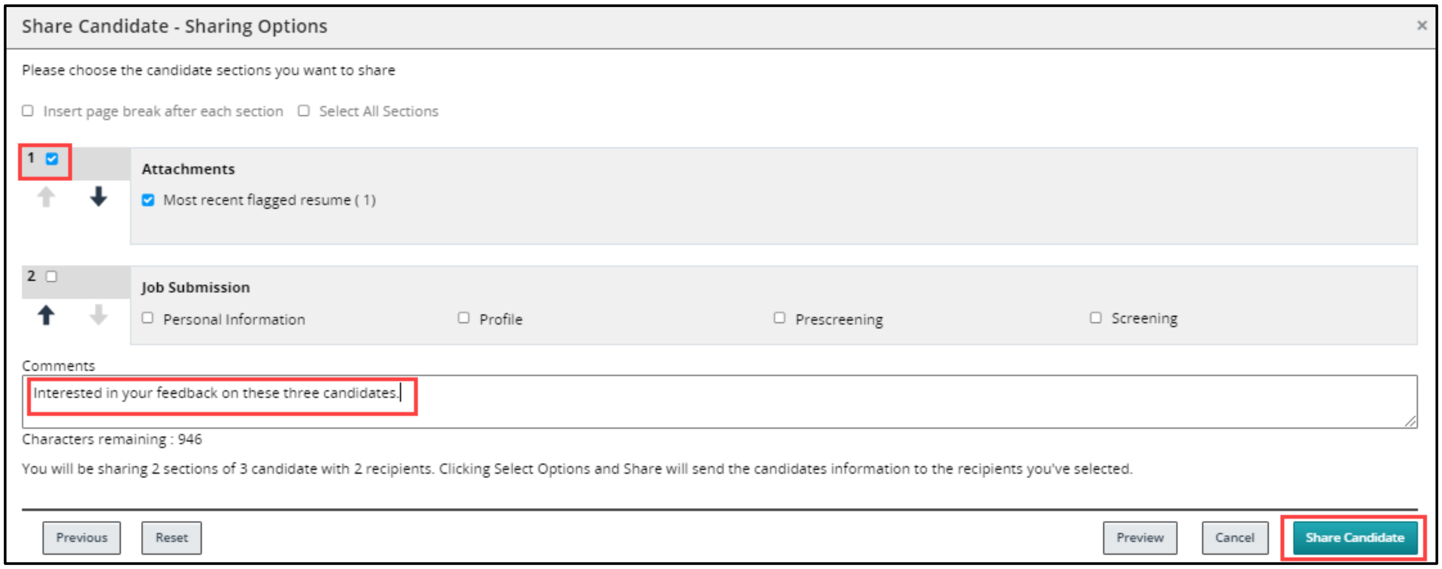


2. Click **More Actions**, and select **Share Candidate**.



3. From the Filters panel, select and apply any filters to help narrow the list, if necessary.
4. Select the checkboxes of the people with whom you want to share the selected candidate profiles.
5. Click **Next**. The Share Candidate – Sharing Options window appears.

6. Select the candidate sections you want to share, such as Attachments to share resumes.
7. In the **Comments** field, type a message to the people you are sharing with.
8. Click **Share Candidate**.



Dispositioning Candidates

As interested applicants begin applying to a job posting, you will disposition, or move them further along the candidate selection workflow (CSW). A CSW is comprised of the steps and statuses that a candidate moves through as they are being considered (or rejected) for a position. CU Careers provides two CSWs, Recruit and Direct Hire.

Direct Hire is used for hiring a previously identified candidate, such as a student, temporary employee, or lecturer. This workflow is a shortened form of the Recruit CSW in that it does not have the Under Review and Interviews steps. Direct Hire is designed for electronic collection of the candidate's personal data, offer details, and the completion of required background checks.

For a detailed summary of the steps and statuses in each CSW, refer to the following job aids:

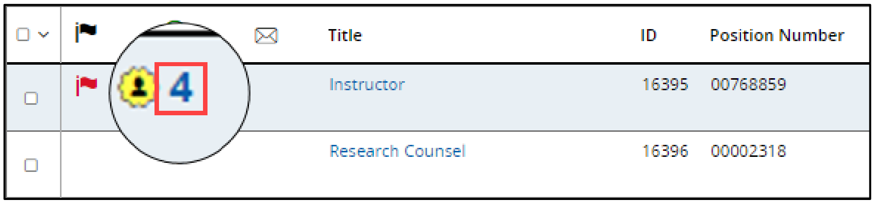
- *Candidate Selection Workflow – Recruit Job Aid*
- *Candidate Selection Workflow – Direct Hire Job Aid*

When you disposition a candidate, you are moving the candidate to a different step and status in the selection workflow. You can mass disposition up to 150 candidates who are the in the same step and status.

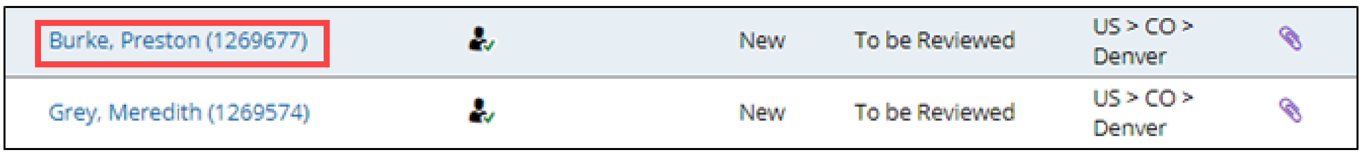
To disposition a candidate:

1. Click **Requisitions** from the navigation bar.

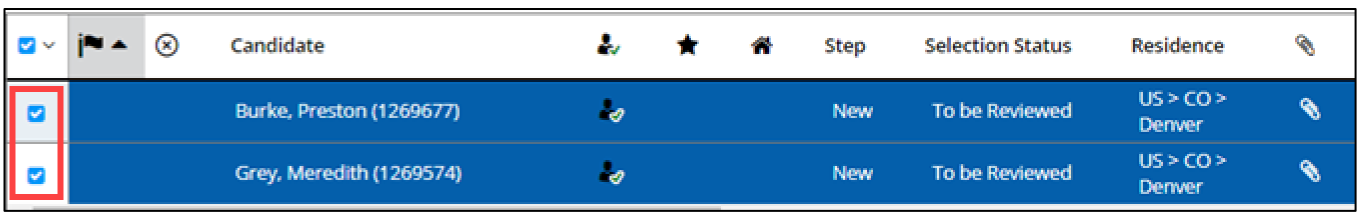
2. Click the numeral to the left of the requisition to view candidates for the requisition.



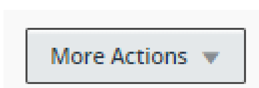
3. Click the candidate profile you want to disposition.



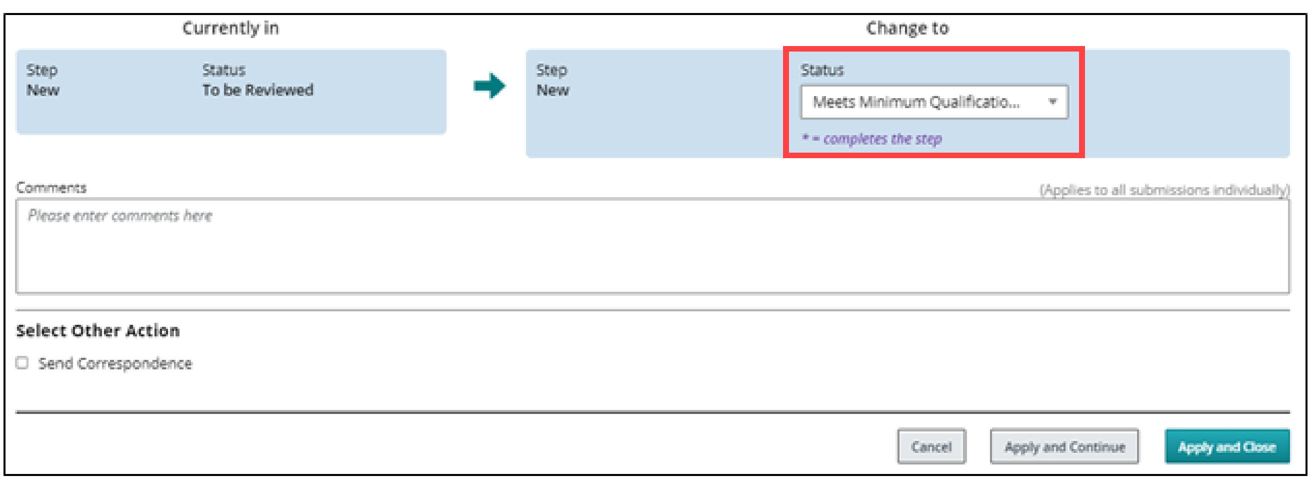
Or, select the checkboxes that appear next to the names of those candidates who are in the same step/status.



4. Click **More Actions**.



5. Select **Change Step/Status** from the dropdown.
6. Under **Change to**, select the correct status from the **Status** dropdown.
   If you are rejecting a candidate, select **Not Selected**. The system prompts you to select a reason for rejecting the candidate.



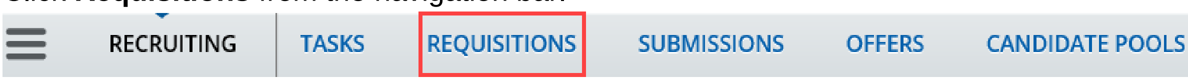
Note: You can click the Send correspondence button and choose an email template to send to the candidate. If you are not selecting a candidate for the position, send that candidate the appropriate Not Selected email. See Sending Correspondence to Candidates for more information.

7. Click **Apply and Continue** to continue progressing the candidate through step and status. Or, click **Apply and Close** to save the chosen step or status.

Reverting Candidates

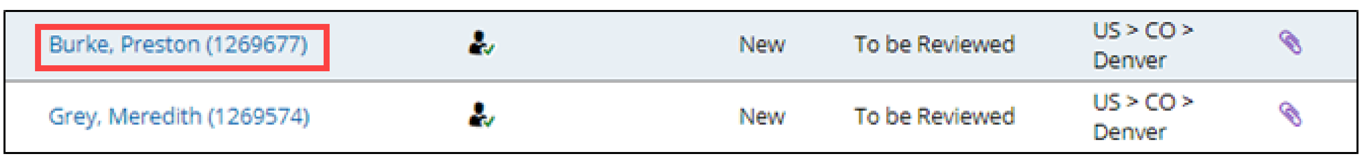
Sometimes you may want to move a candidate back, or revert the candidate, to a previous step or status in the candidate selection workflow. Reverting a candidate to a previous status can be used when you have progressed a candidate too far in the workflow, or to initiate confidential letters of recommendation further in the recruiting process. (The ability to collect confidential letters of recommendation can occur in the Under Review step; therefore, you would need to revert a candidate's status if you have moved them past this point in the workflow.)

1. Click **Requisitions** from the navigation bar.

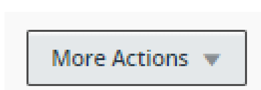


2. Click the numeral to the left of the requisition to view all candidates for the requisition.

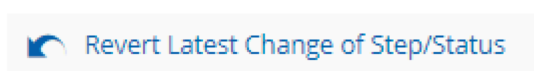
3. Click the candidate profile you want to disposition.



4. Click **More Actions**.



5. Click **Revert Latest Change of Step/Status**.



6. Enter **Comments**.
7. Click **Revert and Continue** to revert more than one Step/Status.

   Or, click **Revert and Close** to revert one Step/Status.

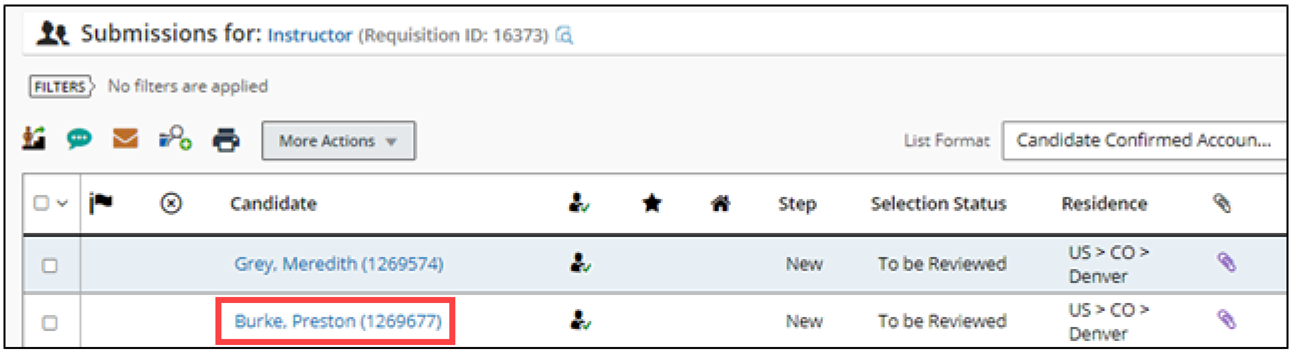
Collecting Letters of Recommendation

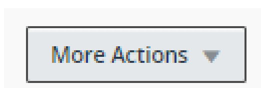
You can collect confidential letters of recommendation using step and status values in the Recruit CSW. In order to begin the process, a candidate must be in the **Under Review** step and **Send Invite for References** status.

Note: In order to use the automated process of collecting letters of recommendation, make sure the requisition is posted to the Required for Request of Confidential Letters of Recommendation career section under the Sourcing tab of the requisition.

To initiate the process for collecting confidential letters of recommendation:

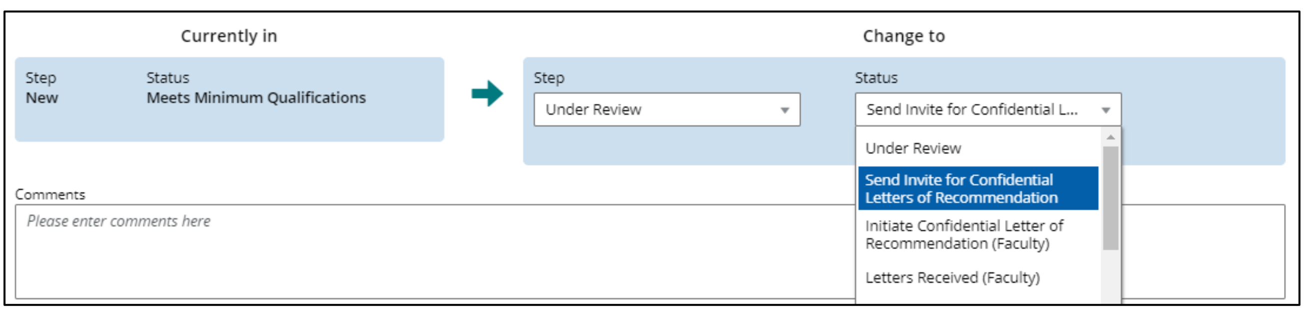
1. From your list of candidates, click the link of the candidate whose references you want to collect.



2. Click **More Actions**. 

3. Click **Change Step/Status**. 

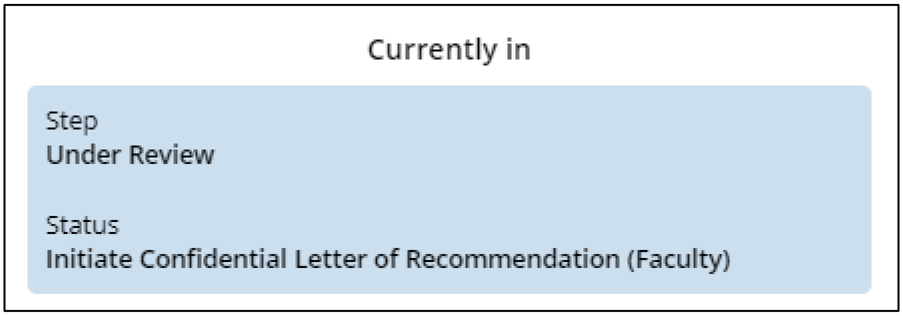
4. Under **Change to**, click the **Step** dropdown and select **Under Review** as the new step.
5. From the **Status** dropdown, select **Send invite for Confidential Letters of Recommendation**.



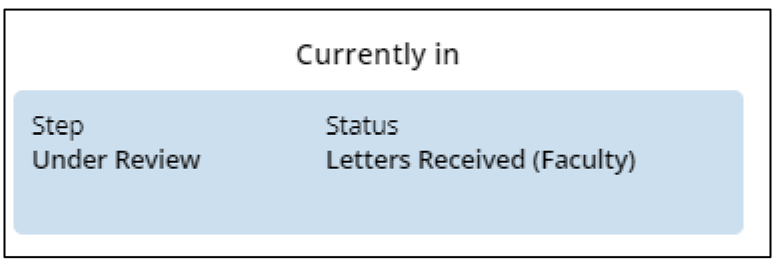
6. Click **Apply and Close**.

The following processes are automatically initiated by the actions of the candidate and the individuals selected by the candidate as references:

- The **Send Invite for Confidential Letters of Recommendation** status sends an automated email to the candidate to log into his or her application profile and upload contact information for three references.
- Once the candidate has successfully uploaded and submitted the contact information for the three references, the system dispositions the candidate to the next status, which is **Initiate Confidential Letters of Recommendation (Faculty)**.



- Once at this status, the system sends an automated email asking the referrers to upload a confidential letter of recommendation for the applicant.
- After the three referrers have uploaded their confidential letters of recommendation, the system dispositions the candidate to the status of **Letters Received (Faculty).**



After all three confidential letters of recommendation have been submitted, they will be viewable from the candidate's profile on the Attachments page. These letters will not be viewable to the candidate.

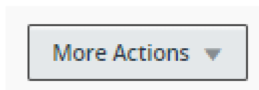
Notifying the Candidate of Received Letters

After all three confidential letters have been collected, you can notify the candidate:

1. Enter the candidate’s profile and verify that three letters have been collected. After all three references have submitted their letters, they can be viewed from the candidate’s profile on the Attachments page. <u>The candidate is not able to view the letters.</u>

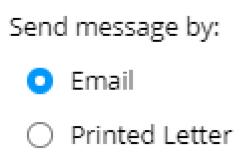
Other Attachments relevant to this Submission | Upload Other Attachment

File Name	Attached by	Visible to candidate	Size	Date	Description
CLOR_Mouse_CLOR_Test_MinnieMouse.pdf	WebServices Integrator	No	51 KB	Jun 4, 2020	Confidential LOR
CLOR_Mouse_CLOR_Test_MickeyMouse.pdf	WebServices Integrator	No	49 KB	Jun 4, 2020	Confidential LOR
CLOR_Duck_CLOR_Test_DonaldDuck.pdf	WebServices Integrator	No	51 KB	Jun 4, 2020	Confidential LOR



2. From the candidate’s profile, click **More Actions**.

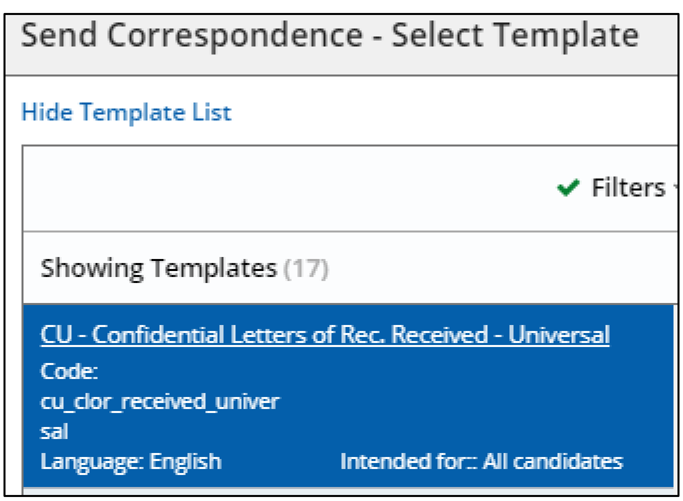
3. Choose **Send Correspondence**.



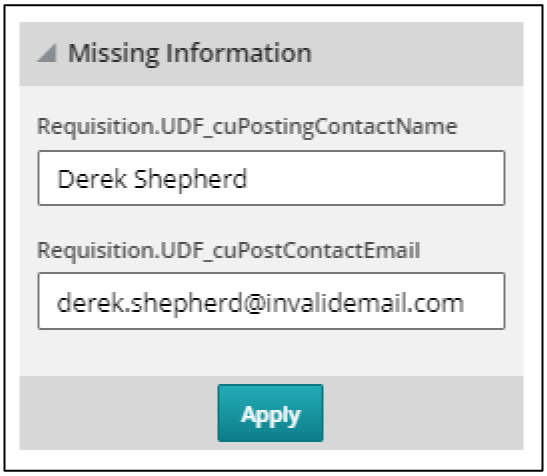
4. Under **Send message by:**, select **Email**.

5. Under **Write a message**, click **From Template**.

6. Click **Next**.
7. From the template list, select **CU - Confidential Letters of Rec. Received - Universal**.



8. Click **Select Template**.
9. Enter Missing Information, if applicable, and click **Apply**.



10. Preview the message or click **Edit Message** to make any changes.

11. Click **Send**.

Sending Correspondence to Candidates

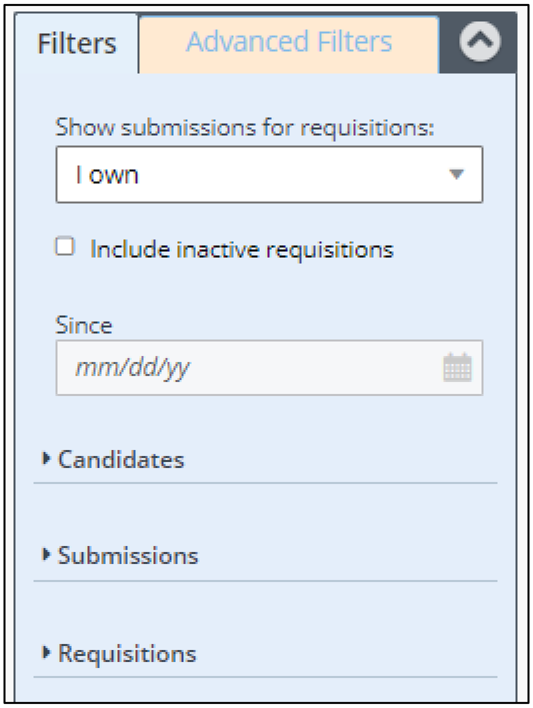
You can send correspondence to a single candidate, or multiple candidates at one time, at any point in the recruitment process. Correspondence can be sent to up to 150 candidates at a time. To make the process quicker, you can use templates that already contain the content for your communication. You should use templates for correspondence when communicating with a candidate about the selection process (not selected, still reviewing, meets minimum qualifications, or does not meet minimum qualifications).

Sending Correspondence to Candidates Using a Template

This section describes how to send a correspondence using a template to one or more candidates.

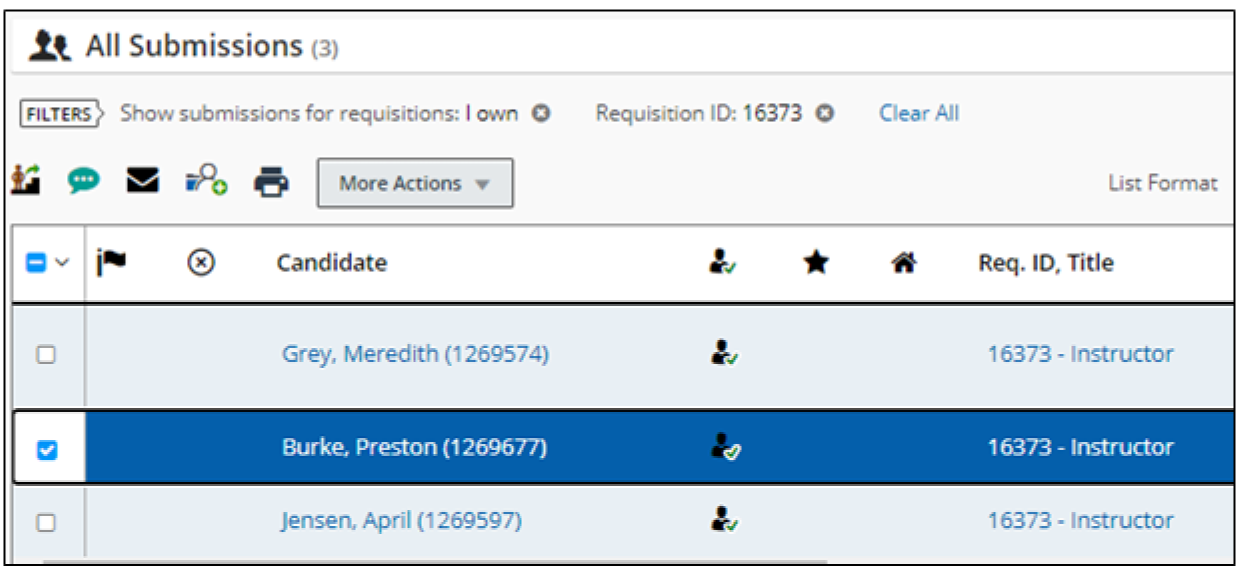
1. Click **Submissions** from the navigation bar (there are several ways to search for a candidate. Searching using the **Requisitions** tab is another commonly used way).

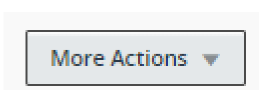
2. Use **Filters** to narrow your selection by Candidates, Submissions, or Requisitions.

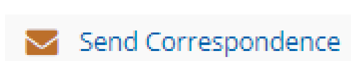


3. Click **Apply Candidate Filters**. 

4. Select the checkboxes next to the candidates with whom you want to correspond. You can choose one or more candidates (150 maximum).



5. Click **More Actions**. 

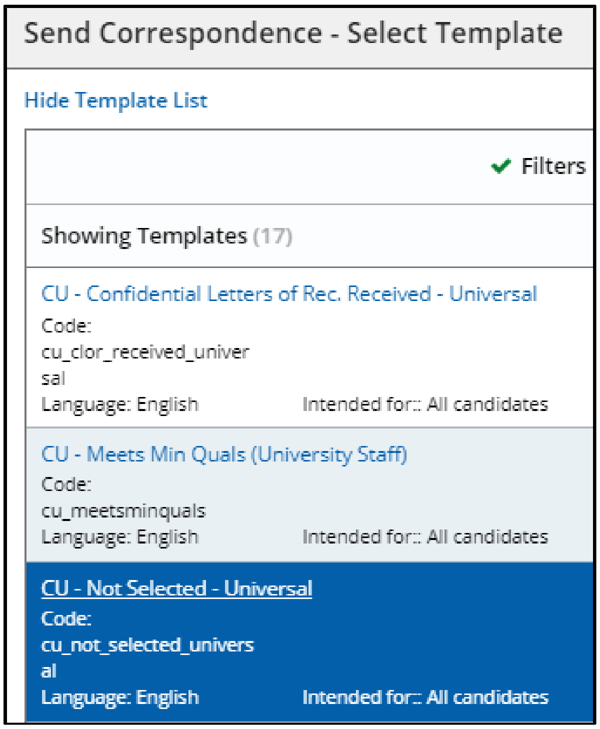
6. Select **Send Correspondence**. 

7. Under **Send message by:**, select **Email**.

8. Under **Write a message**, select **From Template**.

9. Click **Next**.

10. From the Template List, select the template you want to use.



11. Click **Select Template**.

12. Enter Missing Information, if applicable, and click **Apply**.

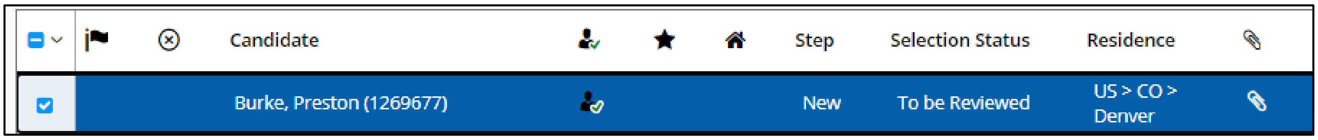
13. **Preview** Message or click **Edit Message** to make any changes.

14. Click **Send**.

Sending Custom Correspondence to Candidates (No Template)

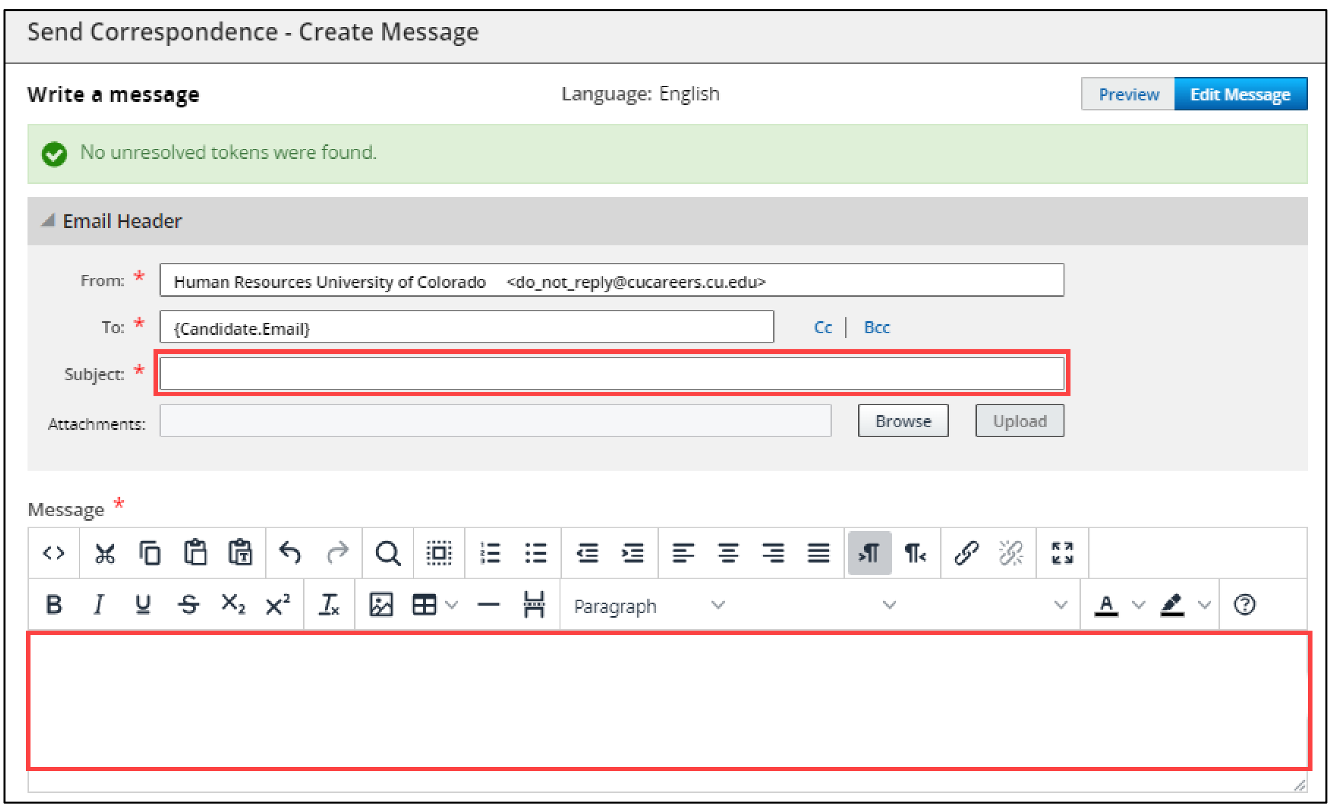
If you don't want to use a template, you can send custom correspondence.

1. Click **Requisitions** or **Submissions** from the navigation bar.
2. Use **Filters** to narrow down selection, if needed.
3. Click the numeral displayed in the requisitions list or click on the candidate's name.
4. Once candidates are identified, select the box for one or more candidates with whom you want to correspond.



5. Click **More Actions**.
6. Select **Send Correspondence**.
7. Select **Email** for Send message by:
8. Click **From Scratch**. 

9. Click **Next.**
10. Type your subject and message.



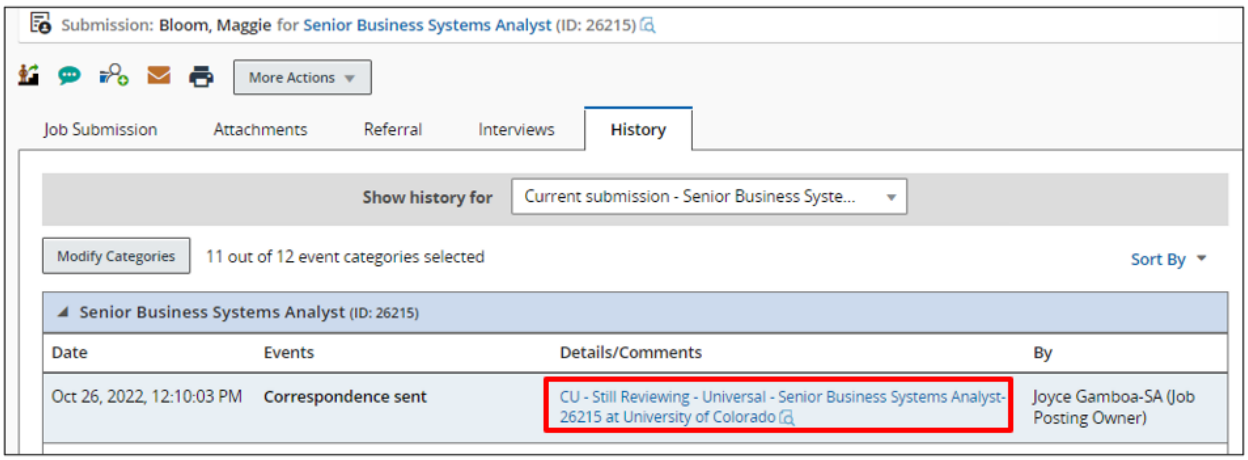
11. Click **Send**.

Resending a Correspondence to Candidates

This section describes how to resend a previously sent manual correspondence to candidates.

Note: You cannot resend system auto-generated correspondence.

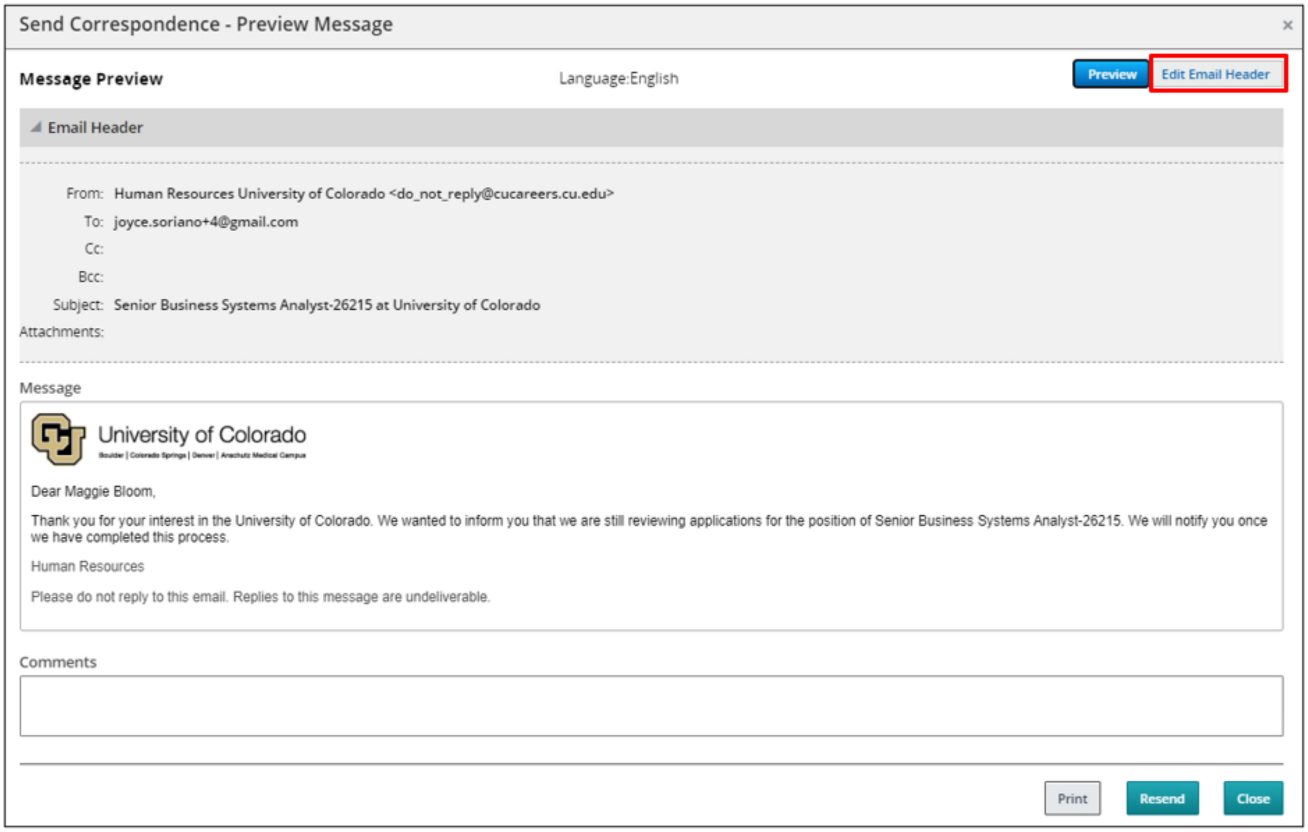
1. Search for your candidate through either **Requisitions** or **Submissions** from the navigation bar.
2. Use **Filters** to narrow down the selection, if needed.
3. Click the numeral displayed in the requisitions list or click the candidate's name from the submissions list.
4. Click the candidate's name.
5. Click the **History** tab of the candidate's submission. The History tab displays all submission events.
6. Refer to **Correspondence sent** in the Events column. To access the previously sent email, click the correspondence link under Details/Comments.



7. Once open, options appear that let you either resend the email as-is or edit the email header prior to resending.

- If no updates need to be made, click **Resend**.
- To make updates, click **Edit Email Header**.

Note: You can only edit the header and not the actual message.



8. After making your updates, click **Resend**. 

Using HireVue for Video Interviews

HireVue is a video interviewing tool that lets recruiters and hiring managers screen candidates and conduct live interviews over the Internet. You can only access the CU Careers integration with HireVue if you currently hold an account in HireVue.

Note: To use the integration with HireVue, you must:

- Select the option for Video Interview on the requisition before posting the position to the web.
- Post the requisition to the HireVue career section.

Refer to *Working with Requisitions Step-by-Step Guide* for more information.

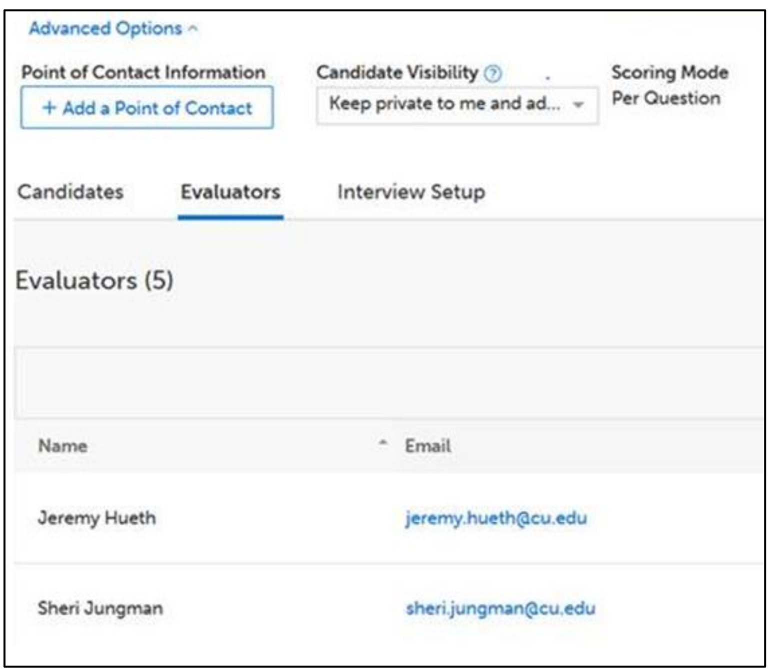
When using HireVue, you have the following options:

- **Candidate Centric:** Invite the candidate to complete an online assessment. The requisition must be associated with a position that has been manually entered into HireVue in order to use the service and prior to sending a request to a candidate. Once the screening service is requested by the user, HireVue sends an email inviting the candidate to complete the interview questionnaire; a login is required by the candidate.
- **Recruiter Centric:** Request Screening Services directly from a candidate profile. Once the screening service is requested, HireVue sends an email inviting the candidate to complete the interview questionnaire; no login is required by the candidate.

Selecting Options for a HireVue Interview

These steps are the same for both the Candidate Centric model and the Recruiter Centric model:

1. For the **Interview Type**, select one of the following:
    - **On Demand:** This option should be selected for the Candidate Centric model. This option lets you select questions that can be answered by candidates at their convenience. Questions can be essay, multiple choice, multiple selection, or video. The options for the time a candidate takes to answer a question are No Limit (no time limit) or the prep time to read question can be 1-59 seconds. The response time can be set to 1-10 minutes. We recommend questions that can be read twice in 30 seconds and allowing a candidate 3 minutes for response.
    - **Live Video:** This option lets you set up a face to face interview over the web, and can be used for either model.
2. Select **Scoring Mode**:
    - **Per Question**: Per question scoring provides a more detailed report on answers, however can be inaccurate if not all evaluators are scoring every questions for all candidates. Evaluators should evaluate and rank every question asked in the interview.
    - **Per Candidate**: This option is best if users have a large number of candidates and evaluators. If an evaluator doesn't think the candidate is a good fit for a position they can give the overall score at any time and not rate each questions.
3. Select **Candidate Visibility**:
    - **Keep private to me and admins**: This option is the default. You can add evaluators individually.



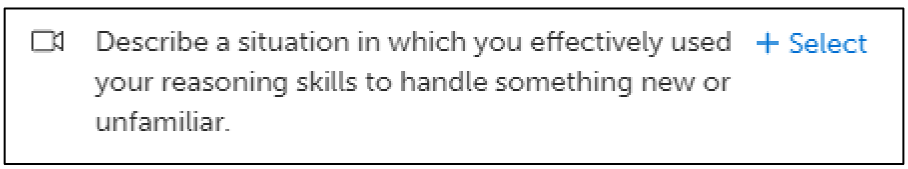
- **Share with my team**: HireVue Admins can assign account members to teams. This option automatically shares this position and its candidates with those who are members of your team.
- **Share with my account**: Shares will all account members.

4. In the **Point of Contact Information**, enter the name of the contact person that will be included in the email to the candidate.
5. Enter the Requisition ID in both **Requisition ID** fields from CU Careers.

6. Click **Add a Video** in Intro Video and choose the appropriate introduction video.
7. Click **Add a Video** in Closing Video and choose the appropriate video.
8. Click **Add a Question**. 

9. Choose from the following question types:
   - **New Question**:
     i. Enter the new question in the text box.
     ii. Choose a candidate response type from dropdown.
     iii. Click **Save** or **Save & Add Another**.

   a. From **Question Bank**, click +**Select** to the right of the question you want to add.



   b. From **Question Template**: Use only if you have previously created question templates.
   c. From **Previous Position**: Choose a previous position you want to include questions from.

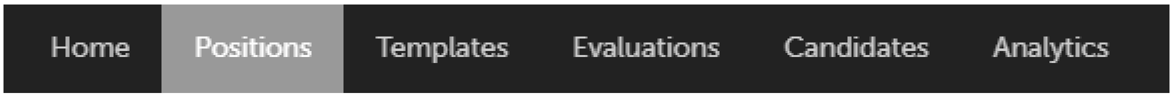
10. Click **Add These Questions**. 

The candidate will receive an email asking them to login to CU Careers. Upon logging in, the candidate will be sent to HireVue to complete the virtual interview.

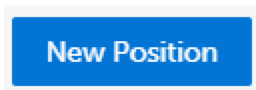
Inviting Candidates Using the HireVue Integration (Candidate Centric)

Invite a candidate to complete an online assessment questionnaire using the candidate centric model. The interview and requisition details must be entered into HireVue before choosing Request a Screening Service from the More Actions dropdown.

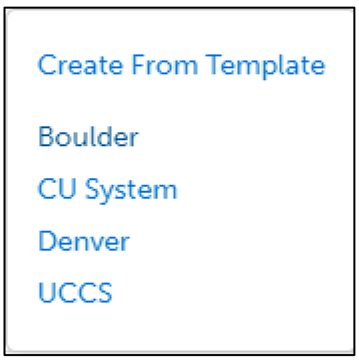
1. Log in to HireVue.
2. Click **Positions** from task bar.



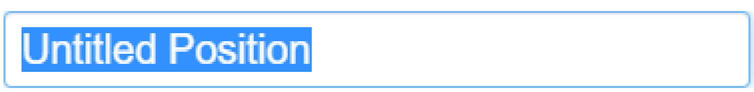
3. Click **New Position**.



4. If prompted, select your campus.



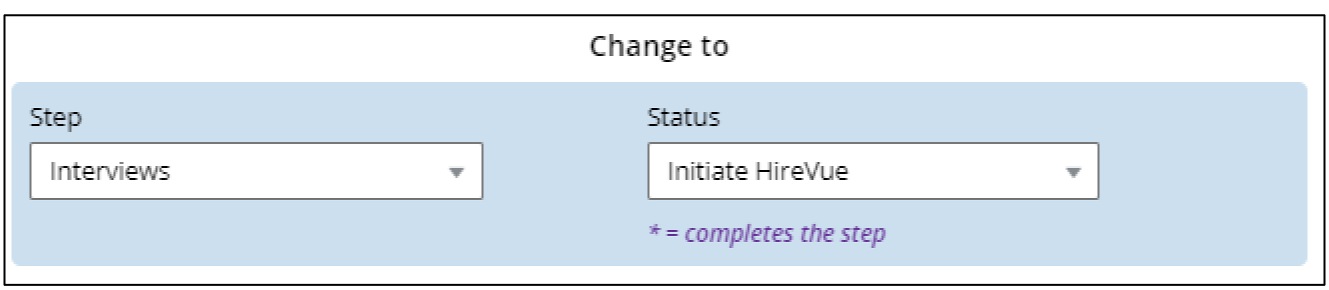
5. Enter the title of the position. This should match your requisition title.



6. Select options for your online interview as described in [Selecting Options for a HireVue Interview](). This process is the same for both the Candidate Centric model and the Recruiter Centric model.
7. After selecting and saving your options, log into CU Careers.

   Note: Ensure interviews are set up in HireVue before proceeding to next steps, as questions and videos cannot be added after candidates have been invited to complete the digital interview.

8. Open the candidate's profile and move them to the **Interviews** step and **Initiate HireVue** status.



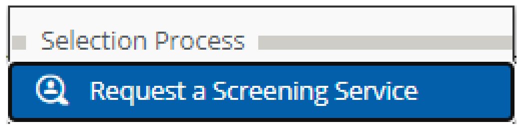
9. Click **Apply and Close**.

The candidate will receive an email asking them to login to CU Careers. Upon logging in, the candidate will be sent to HireVue to complete the virtual interview.

Inviting Candidates Using the HireVue Integration (Recruiter Centric)

This section describes how to use HireVue to invite a candidate to complete an online assessment questionnaire using the recruiter centric model. The recruiter centric model lets you set up the requisition details and interview questions in HireVue after choosing Request a Screening Service from the More Actions dropdown during any step or status.

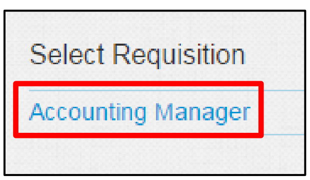
1. From within a candidate's profile, click **More Actions**. 

2. Select **Request a Screening Service**. 

3. From the Available Services dropdown, select **Video Interview, provided by Hirevue, Inc.**

4. Click **Request Service**. 

5. From the pop-up box, click the requisition for which the candidate is being interviewed.



6. From the new pop-up box, click **New Position**. 

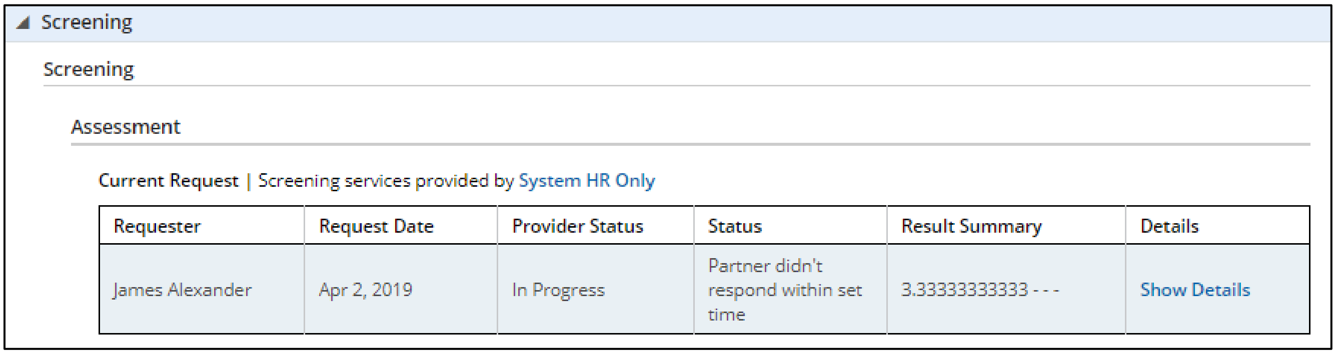
Note: The following information will auto-populate from CU Careers into HireVue: Requisition Title, Requisition ID, candidate first and last name, candidate email address, and candidate phone number.

7. Select options for your online interview as described in Selecting Options for a HireVue Interview. This process is the same for both the Candidate Centric model and the Recruiter Centric model.

Verifying the Completion of a HireVue Interview

To verify if a candidate has completed the HireVue interview:

1. Open the candidate's profile.
2. From the Job Submission tab, expand the **Screening** section. The status for the video interview displays.



Background Check Process

This section contains information for background check coordinators (BCCs) to run HireRight background checks through CU Careers. Background checks are initially identified in the Non-Person Profile Transaction page in HCM and feed over to CU Careers. The BCC can then identify which background checks are required and request the screening service. Background check completion dates feed back to HCM and are stored on the Non-Person Profile of the new hire in HCM.

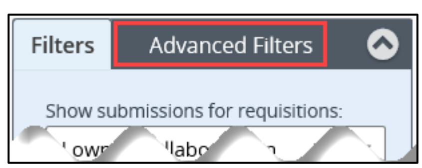
Note: Additional background checks that were not indicated in HCM can be run on an ad hoc basis. Completion dates for ad hoc background checks (those not initiated in CU Careers) must be entered manually into HCM because they are not included in the information sent back to HCM.

Filtering the Candidate List

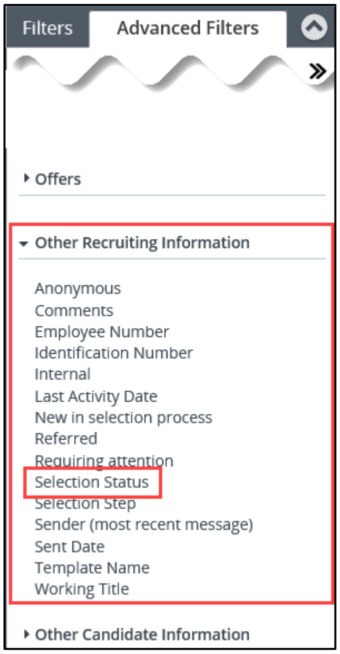
This section describes how to filter a list of candidates so the BCC can identify those that are ready for the initiation of background checks.

To filter the list of candidates:

1. Click the **Submissions** tab from the navigation bar.
2. From the Filters panel, click **Advanced Filters**.



3. Expand **Other Recruiting Information** and click **Selection Status**.



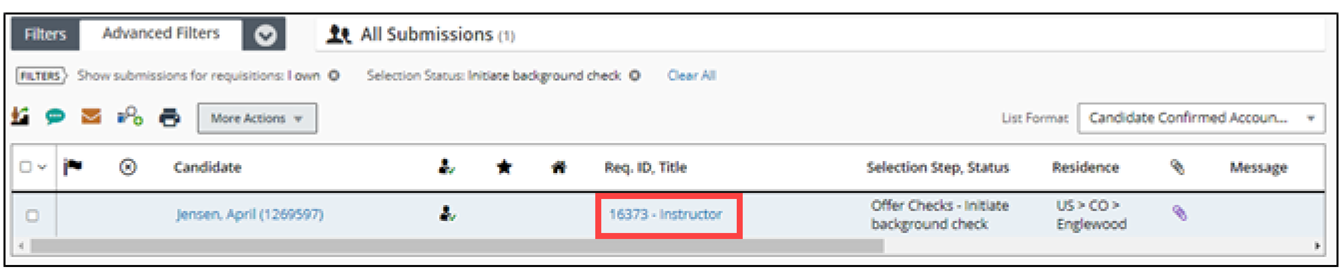
The Filters panel expands to display additional options.

4. Under **Criteria Details**, click the **Open Selector**  . A Select Status window appears.
5. Locate **Initiate background check** in the list, and click **Select** from the Actions column. The system returns you to the filters panel.
6. Click **Add Criteria**. 

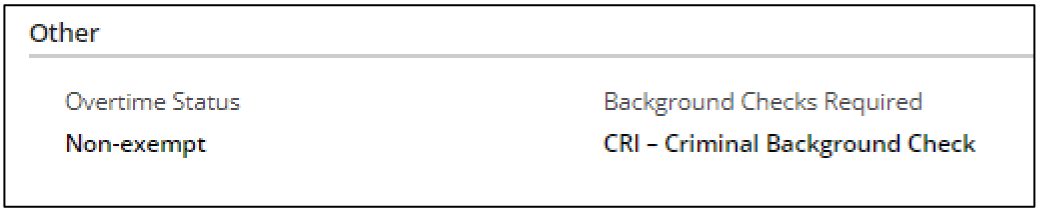
You will now be able to identify required background checks, either by viewing a specific requisition or by viewing the requisition list, as described in the following procedures.

Identifying Required Background Checks

1. From the candidate list, click the requisition title to view required background checks.

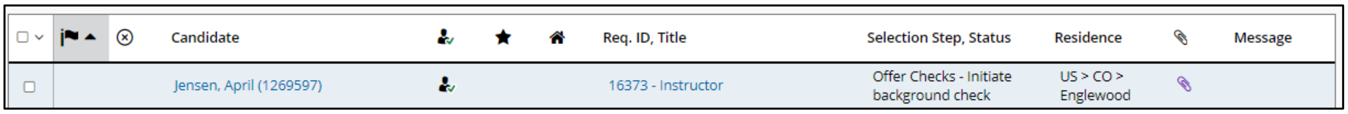


2. From the **Requisition Info** tab, expand **Administration**.
3. Make note of the **Background Checks Required** listed in the **Other** section.



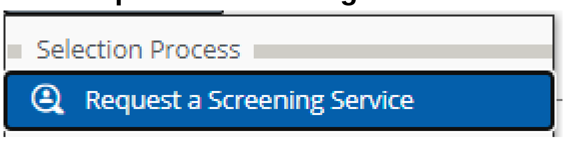
Initiating Background Checks

1. Click the candidate's name to display that candidate's profile.

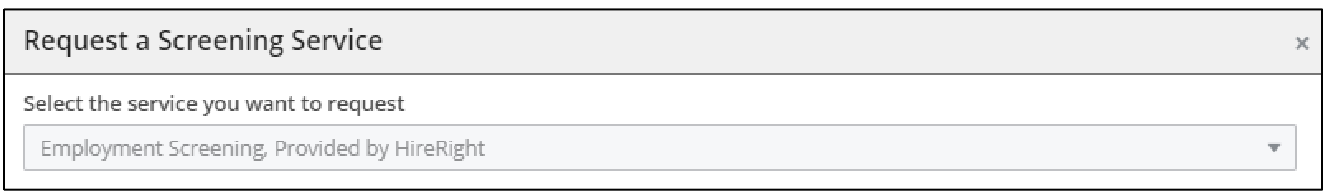


2. Click **More Actions**. 

3. Click **Request a Screening Service**.



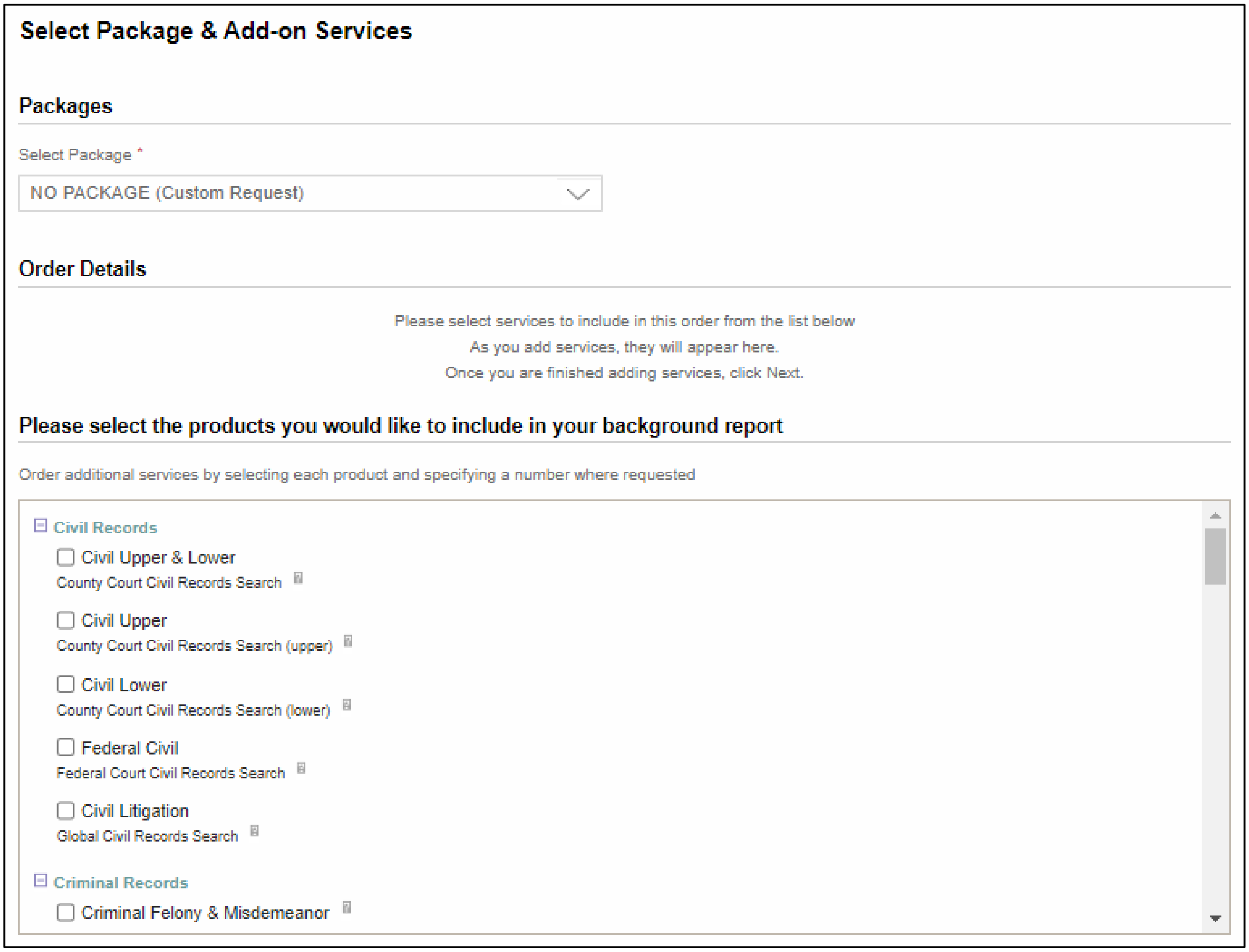
4. From the Request Screening Service box, navigate to the **Available Services** dropdown and select **Employment Screening, provided by HireRight**.



5. Click **Request Service**. 

CU Careers will take you directly to HireRight.

6. Select your packages from the HireRight order screen:

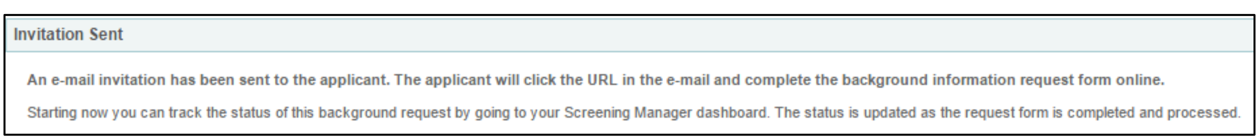


7. Click **Next.** 

8. Review the section, **Applicant Information 1**, to ensure accuracy and select additional recipients of notifications.

9. Click **Next.** 

The Invitation Sent screen displays a confirmation that an e-Consent was sent to the candidate.

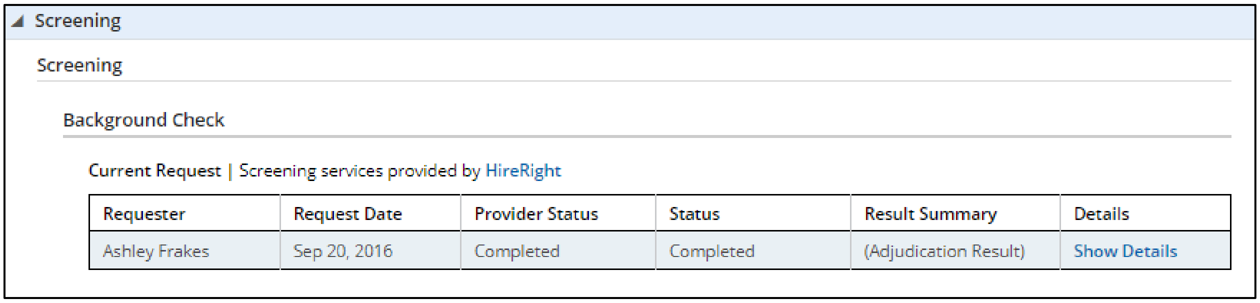


10. Click the **Close this tab** link to return to the Screening Manager or click the **Exit** button at the top of the window to exit the page.

Viewing Background Check Results

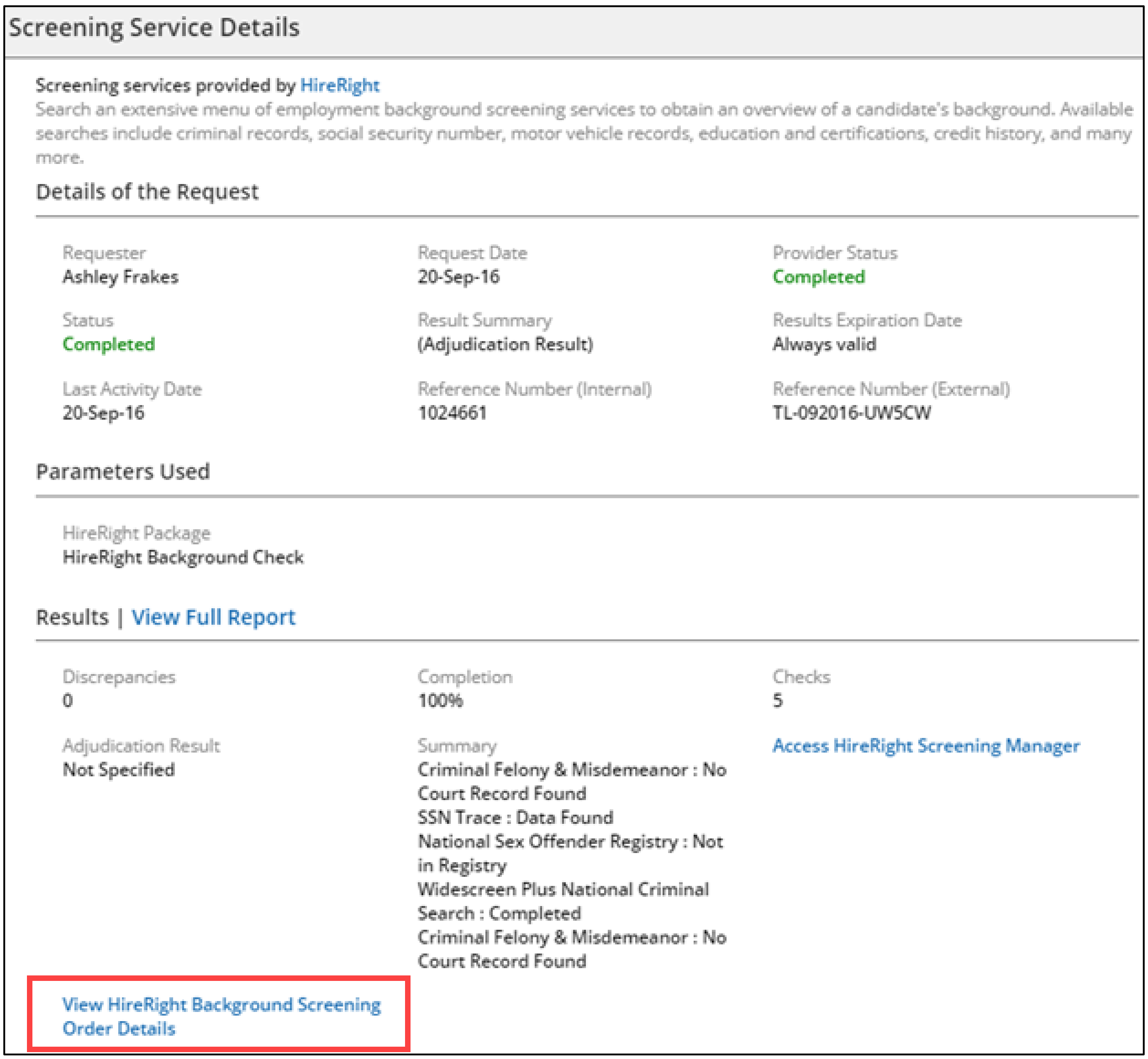
From the candidate's submission profile:

1. Navigate to the **Job Submission**, and expand the **Screening** section.
2. To view full details, click **Show Details**.


Screening
Screening
Background Check
Current Request | Screening services provided by HireRight

Requester	Request Date	Provider Status	Status	Result Summary	Details
Ashley Frakes	Sep 20, 2016	Completed	Completed	(Adjudication Result)	Show Details

3. Click **View HireRight Background Screening Order Details** to view the full report in HireRight.


Screening Service Details

Screening services provided by HireRight
Search an extensive menu of employment background screening services to obtain an overview of a candidate's background. Available searches include criminal records, social security number, motor vehicle records, education and certifications, credit history, and many more.

Details of the Request

Requester
Ashley Frakes

Request Date
20-Sep-16

Provider Status
Completed

Status
Completed

Result Summary
(Adjudication Result)

Results Expiration Date
Always valid

Last Activity Date
20-Sep-16

Reference Number (Internal)
1024661

Reference Number (External)
TL-092016-UW5CW

Parameters Used

HireRight Package
HireRight Background Check

Results | View Full Report

Discrepancies
0

Completion
100%

Checks
5

Adjudication Result
Not Specified

Summary
Criminal Felony & Misdemeanor : No Court Record Found
SSN Trace : Data Found
National Sex Offender Registry : Not in Registry
Widescreen Plus National Criminal Search : Completed
Criminal Felony & Misdemeanor : No Court Record Found

Access HireRight Screening Manager

View HireRight Background Screening Order Details

Creating Offers

CU Careers lets you create and extend an offer using a written offer, such as e-Offer, or verbal offer.

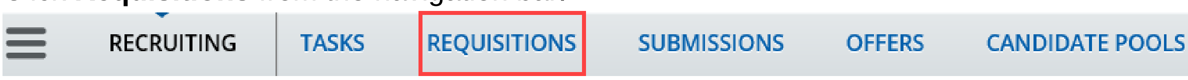
Before You Begin:
Before you can create an offer, the candidate must be in the **Offer** step and the **Offer to be Made** status.

Entering Information in the Offer Matrix

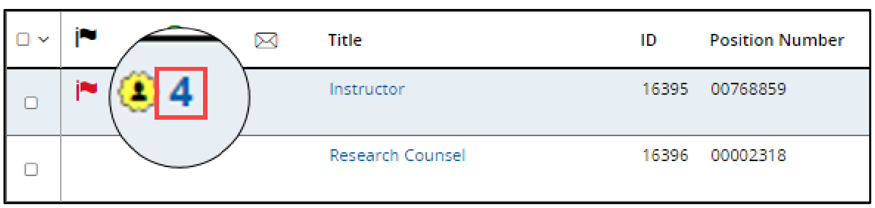
Entering information into the offer matrix is required for all candidates who progress to the Offer step. When planning to hire a candidate, you must complete the fields in the General Terms section. If you are going to use an offer letter template, CU Careers includes information from the offer matrix in the template.

To enter offer matrix information:

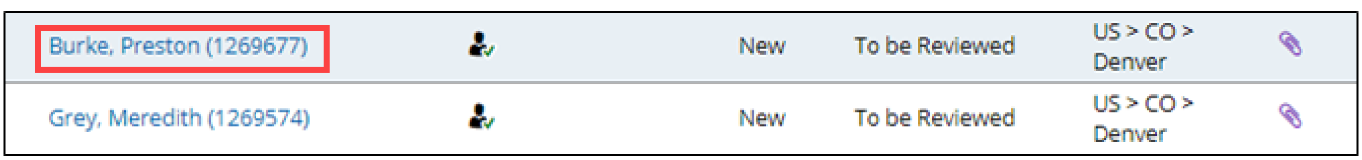
1. Click **Requisitions** from the navigation bar.



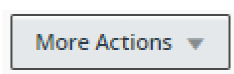
2. Click the numeral to the left of the requisition to view candidates for the requisition.



3. Click the candidate profile you want to create an offer for.

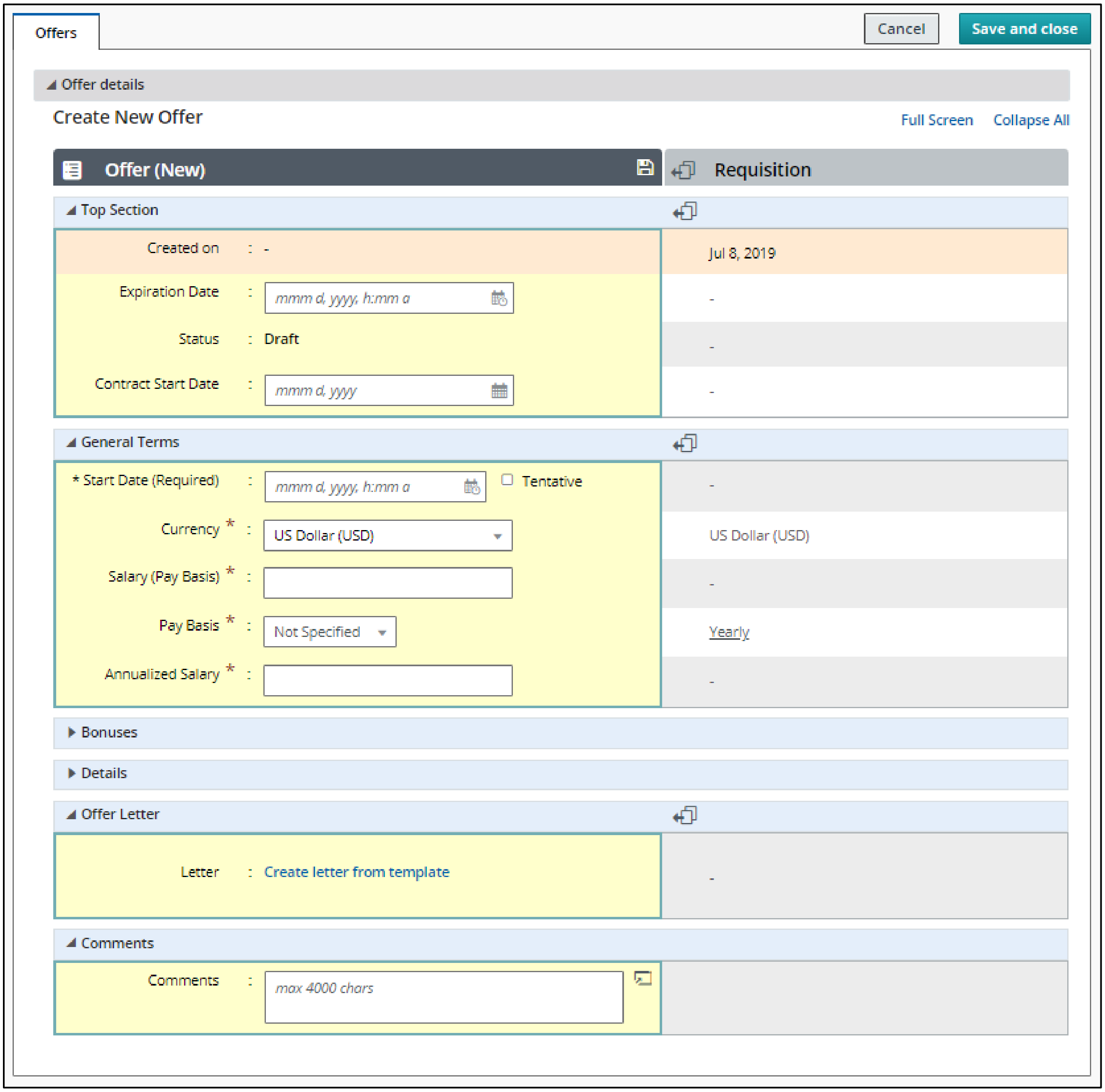


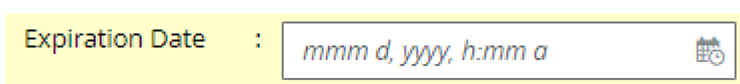
4. Click **More Actions**.

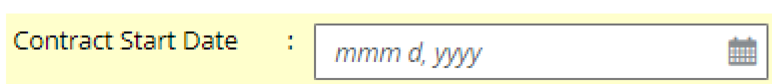


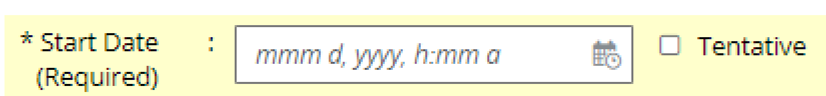
5. Choose **Create Offer**. 

The selected candidate file opens at the **Offers** tab. New offers appear in the middle and are editable.

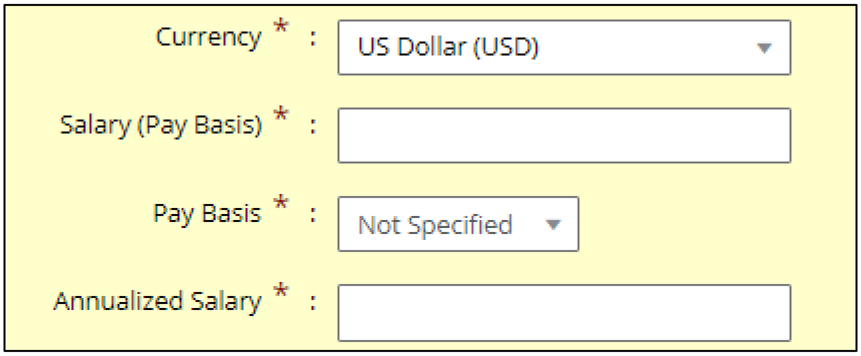


6. Select an **Expiration Date** (optional). 

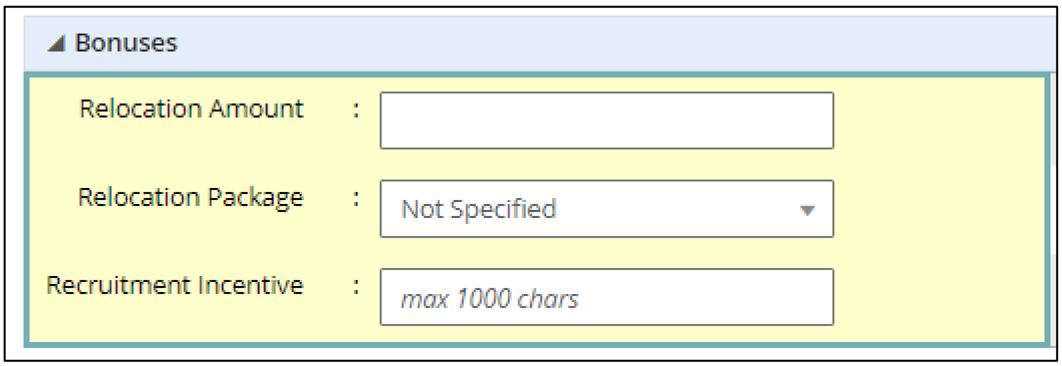
7. Select a **Contract Start Date** (optional). 

8. Select a **Start Date** (required). 

9. Specify all **Currency**, **Salary**, **Pay Basis**, and **Annualized Salary** (required).



10. Enter bonus information, if applicable.



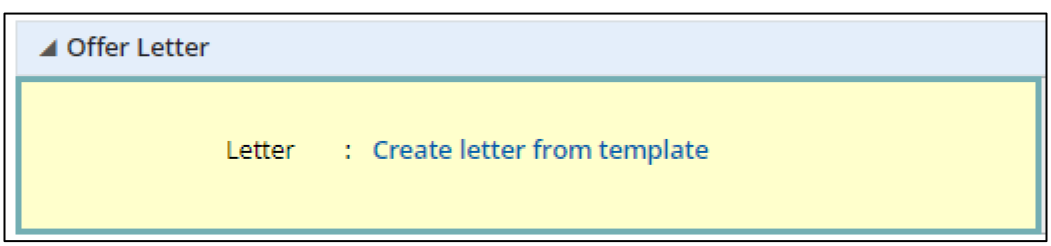
11. If you plan to create an offer letter using an offer letter template, continue with the following procedure.
    Or,
    If you are not creating an offer letter, click **Save and close** and continue to Requesting Offer Approvals.

Creating an Offer Letter Using a Template

This section describes how to create offer letters using templates. Offer letter templates have been added by campus system administrators in Human Resources. If you are unsure about which template to use, contact your campus HR office.

To create an offer letter:

1. Click **Create letter from template**.



   The Select Offer Letter Template assistant window appears.

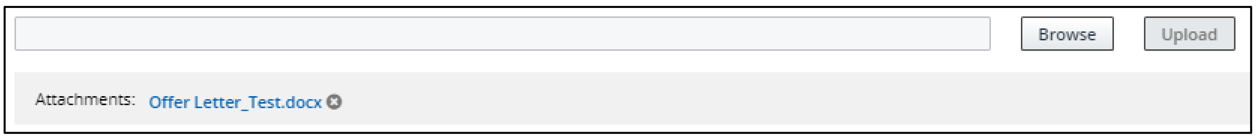
2. Select the appropriate offer template from the Showing Templates list.

3. Click Select Template. 

4. Enter **Missing Information** fields, if applicable.
5. Click **Apply**. 

6. To make additional manual edits, click **Edit Letter** and make any edits to the offer.
7. If applicable, add an attachment:
   a. Click **Browse** to locate documents on your computer.
   b. Select your document, and click **Upload.**

Note: After the file is uploaded, the filename of your document will appear below the Attachments field.

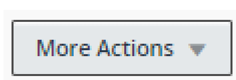


8. To see the letter as the candidate will see it, click **View Letter.** 

9. Click **Finish**. 

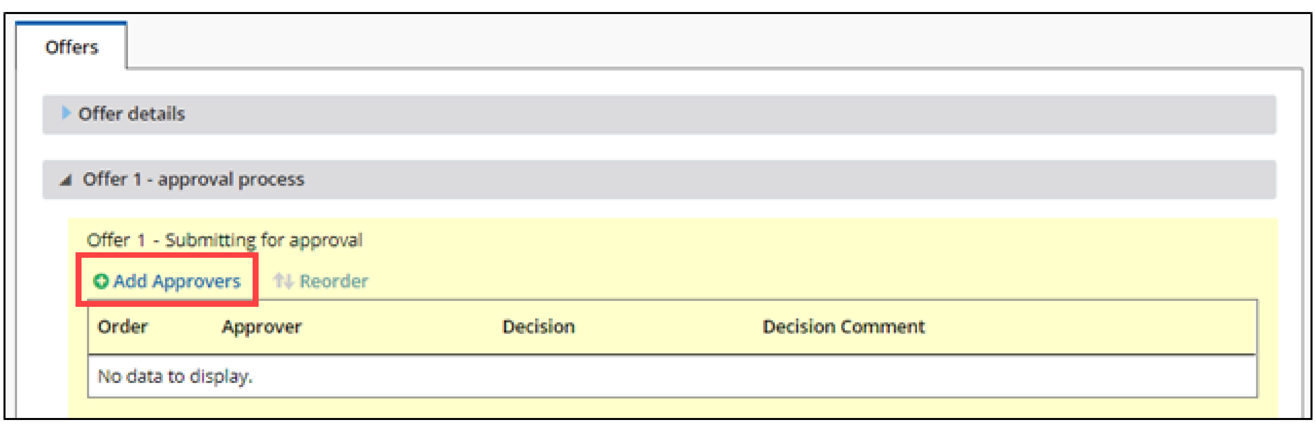
Requesting Offer Approvals

After you have entered offer details into the offer matrix and created the offer, either from scratch or through an offer template, the next step is to request approval.

1. Click **More Actions**. 

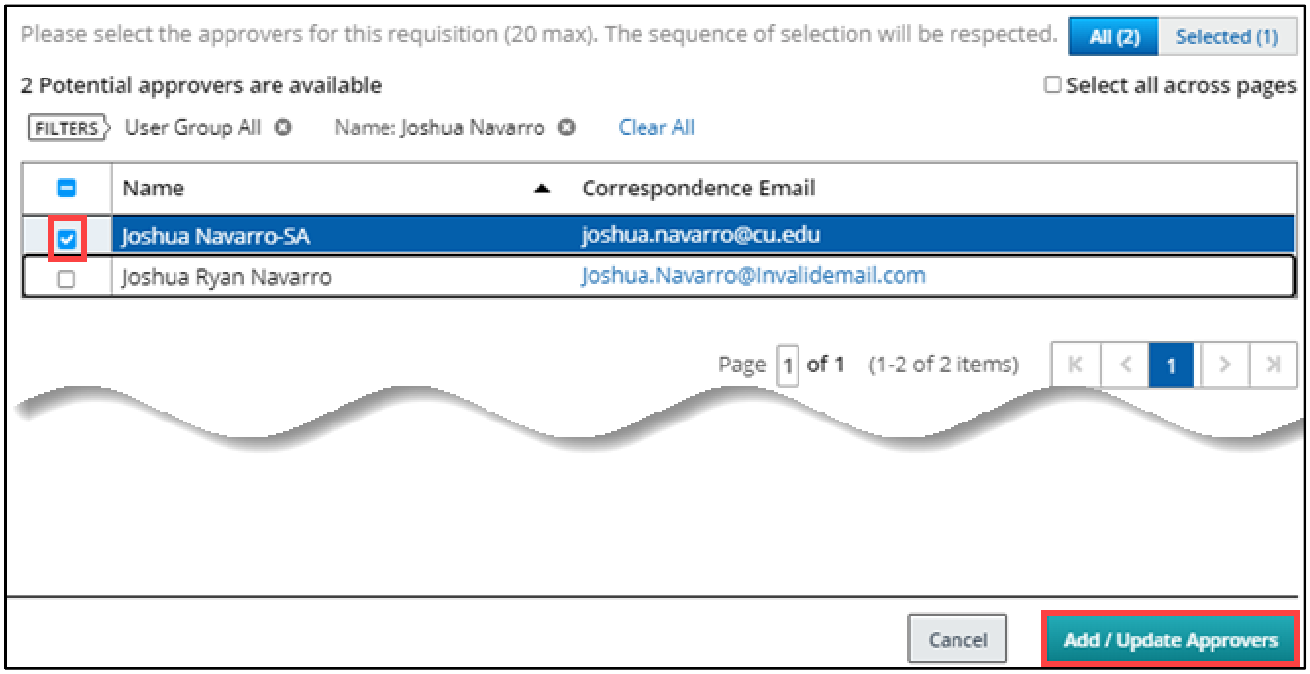
2. Select **Submit Offer for Approval**. 

3. From the Offer 1 – approval process section, click **Add Approvers**.

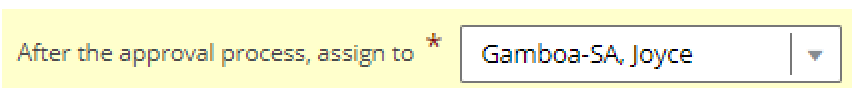


4. From the Filters panel, search for an approver. Click **Apply Filters**. 

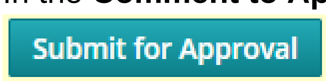
5. Select the checkbox next to the approver's name, and click **Add/Update Approvers**.



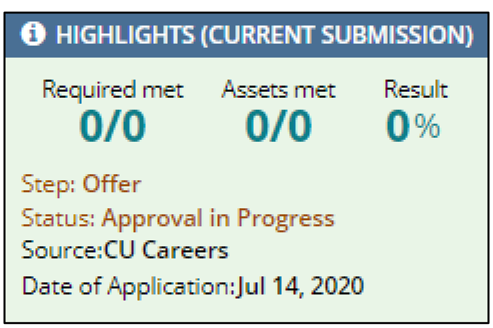
6. At the bottom of the page, click the **Open Selector**  for **After the approval process, assign to**, and select who should receive the approval next, if applicable. Selected approvers are displayed.



7. In the **Comment to Approvers** field, type any comments and click **Submit for Approval**.



The system sends an email to the first approver. The system also progresses the candidate to the Offer step with a status of Approval in Progress.



The approver receives an email requesting they approve the offer. The approver must click **Respond** to either accept the offer or decline it.

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

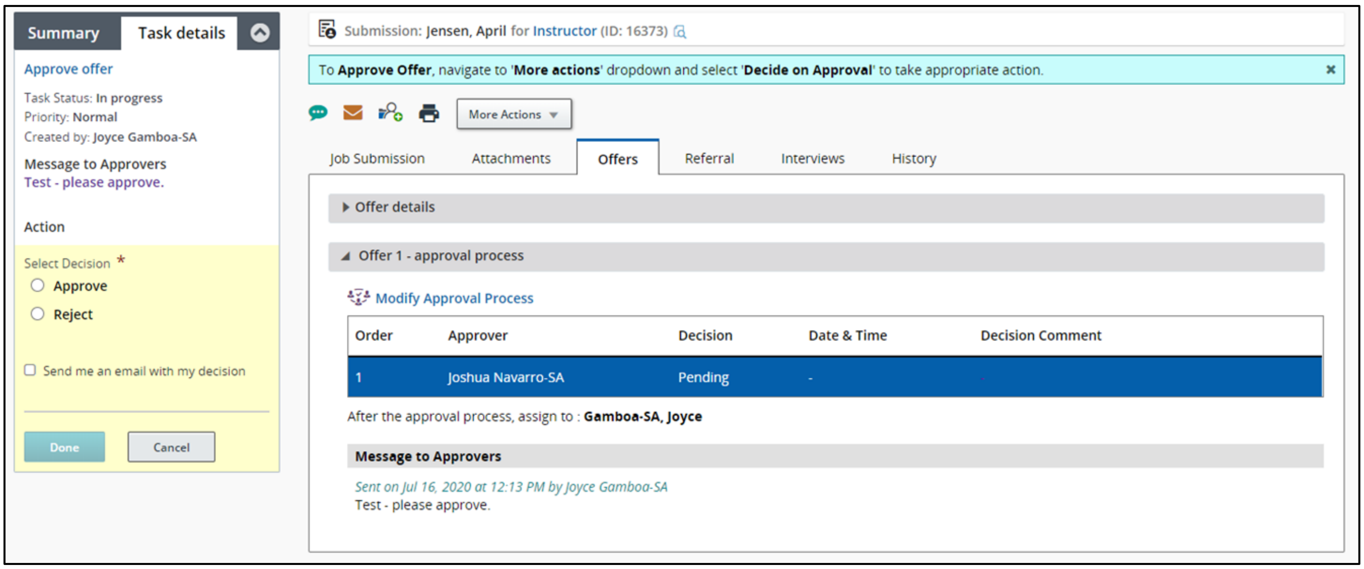
Requisition Approval Request

Requisition Title:	Instructor
Requisition ID:	16373
Requested by:	Joyce Gamboa-SA
Comments:	Test - please approve.

We need an approval from you before we can extend the offer. Please review the offer letter and indicate if you approve or reject the letter.

1. Click on the blue hyperlink: Respond...

Clicking Respond opens an internet browser where the approver can select a response.



After the approver responds to the request, an email is sent to the approval requestor listing the responses.

Note: If multiple approvers are included in the approval path, the process will function like a chain where the second approver will receive the request only after the first approver responds.

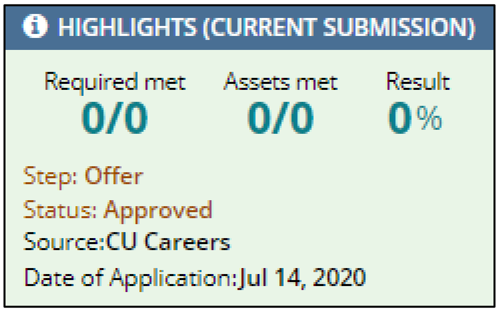
Approval Path

Approver	Decision	Date and Time	Comments
Joshua Navarro-SA	Approved	Jul 16, 2020, 1:41:09 PM	

This approval was requested by on July 16, 2020.
Best regards,
Human Resources

Replies to this message are undeliverable. Please do not reply.

After the offer has been approved, the system progresses the candidate to a Offer step with a status of Approved.



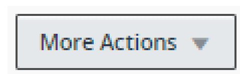
Extending an Offer

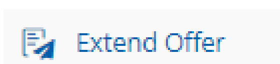
After all required approvals have been received and the offer letter has been created, the offer can be extended to the candidate using the following options:

- In writing, such as an e-Offer (provides method of electronic signature), email, or printed letter.
- Verbally, such as through a phone call or meeting.

The following procedure describes both written and verbal offers.

To extend an offer:

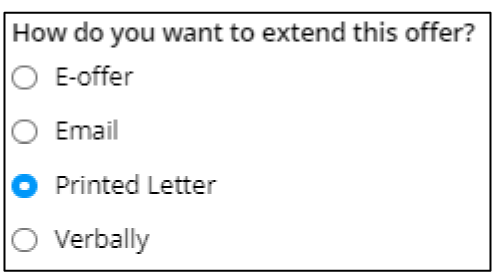
1. From the candidate's profile, click **More Actions**. 

2. Click **Extend Offer**. 

   You can extend via E-offer, Email, Printed Letter or Verbally.

   - To extend an offer in writing:

     a. Choose appropriate business process for your campus whether it be via E-offer, Email or Printed Letter.

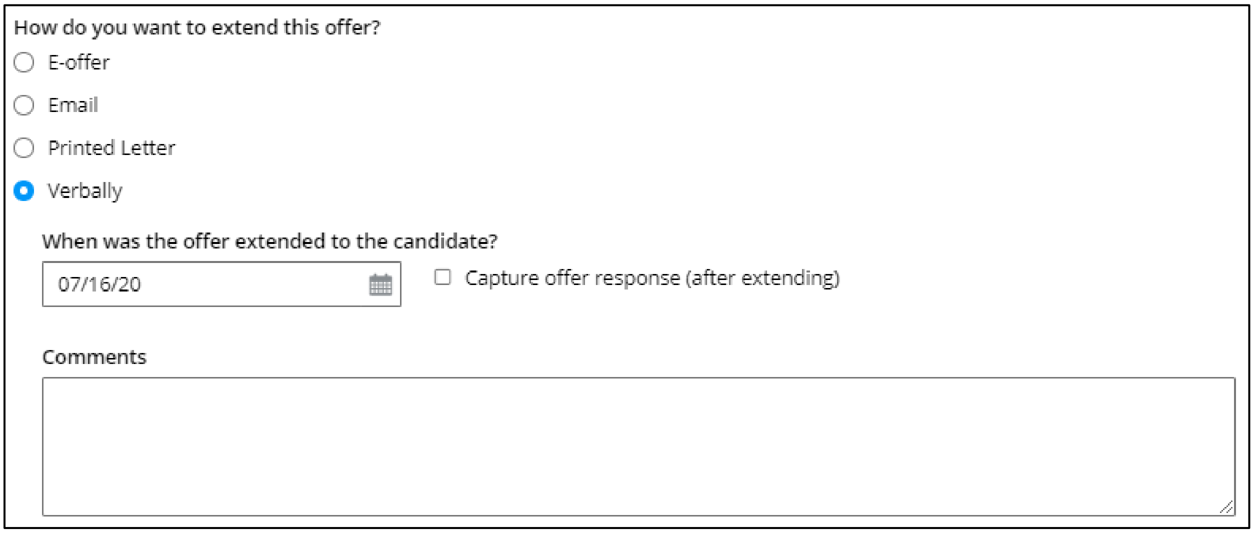
     b. Click **Next**.

     c. Preview offer letter to ensure all required fields are entered or click Edit Message to make manually changes.

     d. Click **Extend Offer**. 

- To extend an offer verbally:

  a. Select **Verbally**.



How do you want to extend this offer?

- E-offer
- Email
- Printed Letter
- Verbally

When was the offer extended to the candidate?

07/16/20

Capture offer response (after extending)

Comments

  b. Type or select the date of the verbal offer.

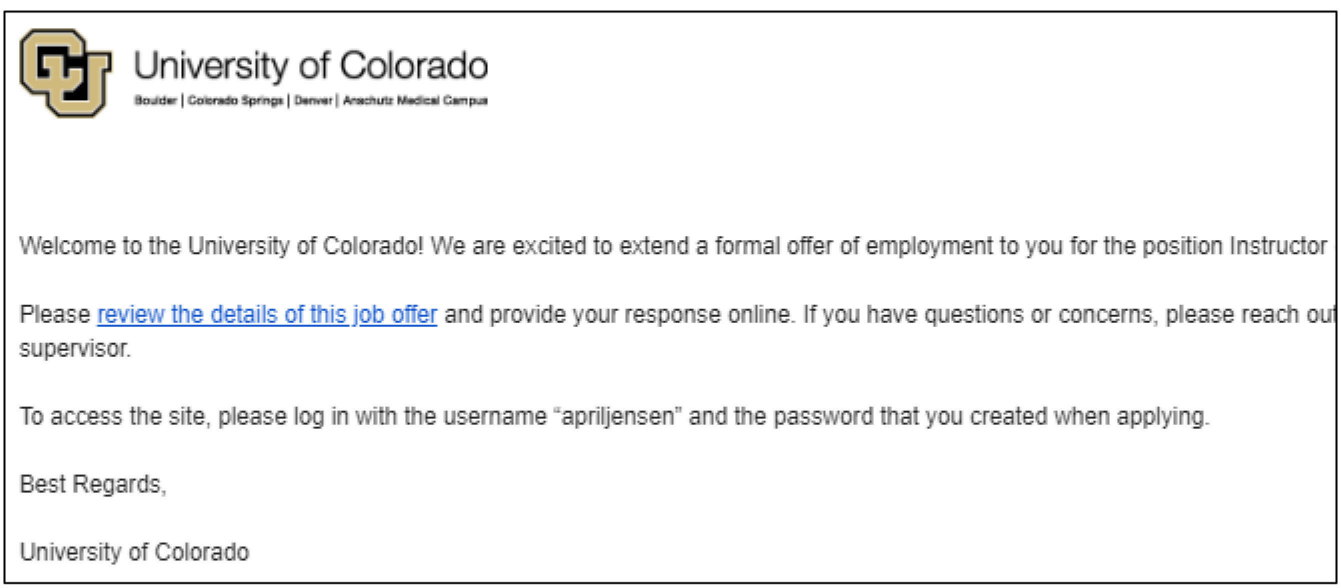
  c. Select the **Capture offer response (after extending)** checkbox, if applicable.

  d. Click **Mark as extended verbally**. 

Note: What the candidate sees through an e-Offer is described in the following section. If you chose to offer verbally, the candidate's response needs to be recorded as described in Capturing a Manual Offer Response.

What the Candidate Sees through an e-Offer

When you select e-Offer as the method of delivery, the candidate receives an email with a link to log into CU Careers and view the offer details.



University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Welcome to the University of Colorado! We are excited to extend a formal offer of employment to you for the position Instructor

Please review the details of this job offer and provide your response online. If you have questions or concerns, please reach out supervisor.

To access the site, please log in with the username "apriljensen" and the password that you created when applying.

Best Regards,

University of Colorado

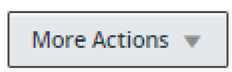
After the candidate logs into their CU Careers account, they can view the offer language from the template. The candidate can also view and download the offer letter as an attachment.

To accept the offer:

1. The candidate selects **Accept the offer** to electronically sign the offer letter.
2. The candidate types his or her **Full Name** and **Initials** and clicks **Submit**.

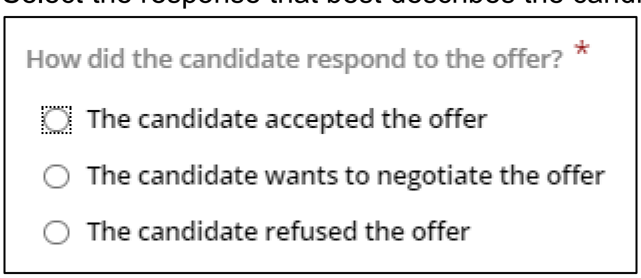
Capturing a Manual Offer Response

This section describes capturing, or recording, a candidate's response to an offer. This should be performed when using the verbal offer option, or when creating the offer letter outside of CU Careers.

1. From the candidate's profile, click **More Actions**. 

2. Select **Capture Offer Response**. 

3. Select the response that best describes the candidate's response.



4. If the candidate accepted, enter the date when the offer was accepted and the start date.

Or, select **The candidate wants to negotiate the offer**, or **The candidate refused the offer**, and enter comments.

5. Click **Done**. 

Completing the Hire Process

Once a candidate accepts an offer, be sure to complete the following tasks:

1. Disposition the candidate to the Hire step with a status of Send DOB/SSN Collection (Required).
2. Once the DOB/SSN information is provided by the candidate, disposition them to the Hire step with a status of Hired (Send to HCM). This initiates a feed of the candidate's personal information to HCM.
3. Disposition remaining candidates to Rejected or Not Selected.
4. Complete the Hire in HCM to create the employee record. Refer to *Hiring an Employee Step-by-Step Guide* for more information.