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 New Hire 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
     - Offer signer name, title, and email: If you are using one of the template offer letters, you can enter the hiring manager's name here exactly how it will appear at the bottom of the form.
  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, but this requires specific formatting. The offer letter templates have been configured with the Docusign formatting.
  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.

  To send the offer to the candidate, update application status to 'Send Electronic Offer to Candidate.'
  When the application status is updated, the candidate will receive an email, including a link inviting them to review the offer documents.

Job Aid: Initiating an Offer Card in PageUp

Initiate the Offer Card

Pick 'Select Other' in the Progress' menu. The application status menu will open, and you can select 'Proceed to Offer Card.' You can optionally customize a communication through PageUp to the hiring team, and then select 'Move now'. This will open the offer card for you to complete.
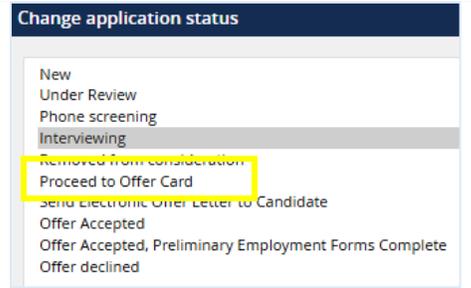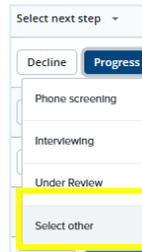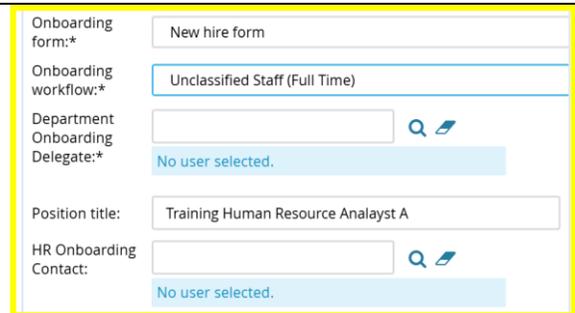
Complete the Offer Card

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.
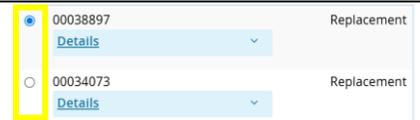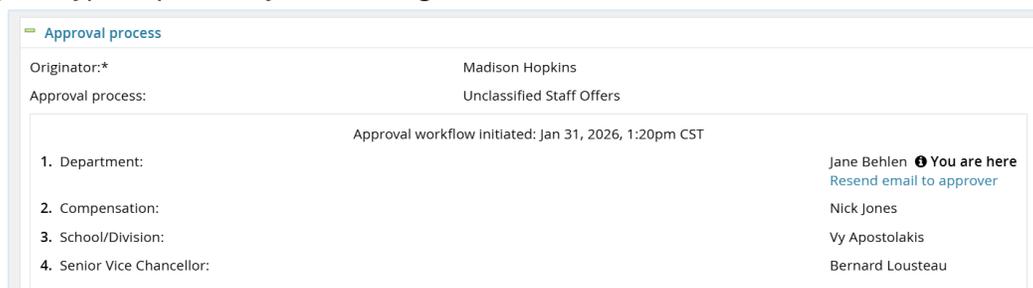
- All employees will complete the 'New hire form.'
- Select the Onboarding workflow based on the type of position. This will determine what tasks will appear in the employee's onboarding portal.
- Department Onboarding Delegate can monitor the employee's progress through their onboarding
- HR Onboarding Contact monitors onboarding progress.

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.

Approval process

| Originator:* | Madison Hopkins |
| Approval process: | Unclassified Staff Offers |

Approval workflow initiated: Jan 31, 2026, 1:20pm CST

1. Department: Jane Behlen ⓘ You are here
   Resend email to approver
2. Compensation: Nick Jones
3. School/Division: Vy Apostolakis
4. Senior Vice Chancellor: Bernard Lousteau

Save and Submit

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

Adding an Offer Document

To add an offer document, select 'Add document.' A pop-up window will open so you can upload your file.
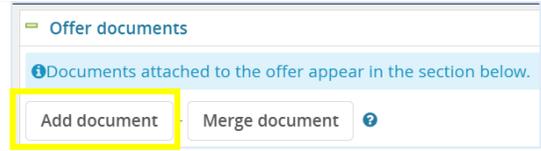
Documents that need to be visible to the applicant **must be uploaded as 'Offer Contracts'** document category.

If your school or division uses a custom offer letter or requires wet signatures from hiring leader(s), you should upload this here and use the document category 'Offer Contracts.'

Other document categories are only visible internally, like funding sheet or org chart.
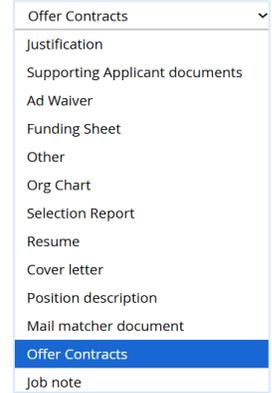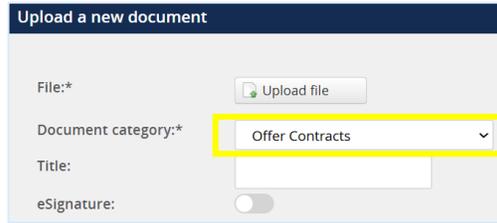
If your school or division uses the HRM offer template, you can use the 'merge document' option. This merges the applicant and offer card details into an offer template, which includes the Docusign option. Select 'Merge document' to begin. You will be prompted to save your progress so that PageUp can process the merge fields.
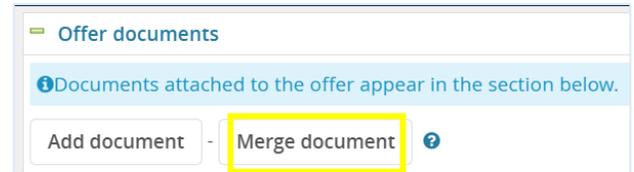
You can preview the template by selecting 'view.' Select the appropriate offer letter template based on the pay frequency type and ft/pt status by selecting the checkbox on the left of the letter, and selecting 'Merge.'

The full-time letters include the post-offer drug testing instructions, agreement to submit to alcohol and drug screening, and Act 264 acknowledgement, and the candidate can sign them when they accept the offer.

The merged offer letter will be visible under the documents section. The eSignature is enabled, and you can open to preview the offer letter. If there is an error or it needs to be re-merged, you can delete it.

Once the offer is approved (with LAHEFSA approval for research positions) the hiring team must discuss the offer with the candidate, including salary, realistic start date, and next steps. When the candidate has given verbal acceptance, any updates to the offer card can be made, including attaching any additional written approvals. **To send the offer to the candidate, update application status to 'Send Electronic Offer to Candidate.'**

Candidate Offers Using Docusign in PageUp

What Your Candidate Sees When You Send the Electronic Offer

The candidate will receive an email with a link to review the offer documents.

When they click the link, they are prompted to log in using the credentials they used for the application. They will see the offer at the top of the applicant portal, highlighted in yellow.

They can View and Sign the offer through Docusign.

Congratulations!

We are pleased to extend an offer of employment for:

Training Human Resource Analayst A

Human Resource Management (NO16740)

Click on the link below to log into your account and review your offer letter.

https://secure.dc4.pageuppeople.com/apply/1218/aw/applicationForm/default.asp

If you have any questions about the offer, please contact me *prior* to accepting or declining.

Employment offer

You must read and agree to the terms of the offer before you can accept or decline the offer.

Congratulations, you have been made an employment offer for your **Training Human Resource Analayst A** application.

Please review the following documents before accepting or declining your offer.

Once you have accepted your offer, it can be retrieved again from within the "view application" link of the job.

Jane` Behlen Offer Letter   [View and Sign]

By submitting, I confirm:

I have read and agreed to the terms of the offer.

[Submit]

Welcome Jane`   🏠 Home   Update profile   Update resumé   Account

You have been made an employment offer for your **Training Human Resource Analayst A** application. Please review your offer carefully, and contact the hiring team directly if you any questions about the details or terms of the offer

View Offer

Candidate Offers That Do Not Use Docusign in PageUp

What Your Candidate Sees When You Send the Electronic Offer

The candidate will receive an email with a link to review the offer documents.

Congratulations!

We are pleased to extend an offer of employment for:

Training Human Resource Analayst A

Human Resource Management (NO16740)

Click on the link below to log into your account and review your offer letter.

https://secure.dc4.pageuppeople.com/apply/1218/aw/applicationForm/default.asp

If you have any questions about the offer, please contact me *prior* to accepting or declining.

When they click the link, they are prompted to log in using the credentials they used for the application. They will see the offer at the top of the applicant portal, highlighted in yellow.

Employment offer

You must read and agree to the terms of the offer before you can accept or decline the offer.

Congratulations, you have been made an employment offer for your **Training Human Resource Analayst A** application.

Please review the following documents before accepting or declining your offer.

Once you have accepted your offer, it can be retrieved again from within the "view application" link of the job.

Jane` Behlen Offer Letter   [View]

By submitting, I confirm:

I have read and agreed to the terms of the offer.

[Submit]

Decline offer

Back to home

Welcome Jane`   🏠 Home   Update profile   Update resumé   Account

You have been made an employment offer for your **Training Human Resource Analayst A** application. Please review your offer carefully, and contact the hiring team directly if you any questions about the details or terms of the offer

View Offer