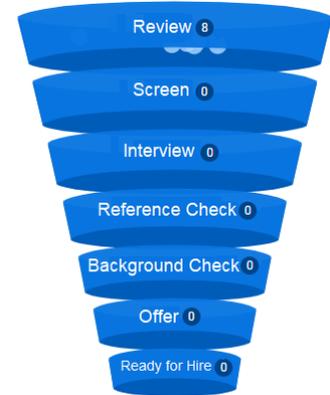


Hiring Through the Recruiting Module

This hire process involves utilizing the Recruiting module in which a job is posted, applicants apply, and are then moved through the recruiting funnel. It describes the final stages after a candidate has been selected for hire and moved to the Offer stage in the recruiting funnel.

See the following Direct Hire section that follows to obtain details regarding hiring when not using the recruiting module.



Confirming Job and Compensation Details

1. After Human Resources places the candidate in the Offer stage of the recruiting pipeline, you will receive a task to complete Workday.

Awaiting Your Action

Offer for Job Application: **Andrea Jones - R0006123 Office Manager**
Inbox - 53 second(s) ago

2. Click on the task will open an Initiate Offer form. Several fields will pre-populate from the information

Initiate Offer for Andrea Jones R0006123 Office Manager

Please confirm the details of the offer, then Submit for review by HR.

Start

Details

Target Hire Date (Job Requisition)
01/15/2024

Hire Date *

Hire Reason

Location *

Document Language

Job Details

Job Profile
M3 - Manager 3

Business Title *

Working Time

Location Weekly Hours
40

Default Weekly Hours
40

Scheduled Weekly Hours *
40

FTE
100%

Enter the Hire Date

Click in the **Hire Reason** field and select the hire reason from the list. In most cases the reason will be New Hire.

Adjust the Job Title to reflect the actual title.

Click **Next** to continue.

3. Review the compensation details pre-populated from the requisition and make any changes in pay as needed.

Click  to continue.

Initiate Offer for [Andrea Jones](#) ... [R0006123 Office Manager](#)

1 minute(s) ago
Please confirm the details of the offer, then Submit for review by HR.

Compensation ▼

<>

Total Base Pay

Total Base Pay

- 54,000.00 USD Annual added

Primary Compensation Basis

Basis
(empty)

Basis Details

- 0.00 USD Annual added

Guidelines

Total Base Pay Range

- 36,687.85 - 68,134.58 USD Annual added

Compensation Package

- General Compensation Package added

Grade

- 8 added

Grade Profile
(empty)

Step
(empty)

Progression Start Date
(empty)

Salary

Assignment Details

- 54,000.00 USD Annual added

Plan Name

- Salary Plan added

Effective Date

- 01/29/2024 added

Hourly

Allowance

4. The following screen will allow you to review the information from the Start and Compensations screens. If everything looks good, click **Submit** to continue.

Initiate Offer for [Andrea Jones](#) ... [R0006123 Office Manager](#)

1 minute(s) ago
Please confirm the details of the offer, then Submit for review by HR.

5. You will receive a confirmation and notice that Human Resources will review the information you entered.

Success! Event submitted

Up Next: Recruiter | Consolidated Approval by Recruiter | Due Date 01/24/2024

[View Details](#)

Creating and Signing the Offer Letter

1. After you submit the hire details, Human Resources will review the information entered. If there are errors or items that need to be changed, HR will send the form back to you as a new task in your inbox along with an explanation of the repair needed. You will need to make the corrections and resubmit for approval. If all looks good, HR will approve the form.

2. You will receive a task to create the offer letter.

Awaiting Your Action

 Candidate Offer Letter: **Andrea Jones - R0006123 Office Manager**
Inbox - 2 minute(s) ago

3. The offer letter form will open. Much of the information will automatically populate based on the details provided previously.

The body of the offer contains a **Note to Supervisors** with additional instructions regarding employees who will work less than full time. If applicable, make the adjustments described and then delete the message in the offer.

If the employee is full-time, you can simply delete the message before proceeding.

If the salary does not transfer into the offer letter, you can delete the gray box and manually enter it.

Do not attempt to sign the offer letter at this stage, the signature will be gathered in DocuSign.

(Due to the length of the offer letter, the sample to the right is an excerpt, with the central content of the offer omitted.)

Generate Document Generate Document for Offer (Default Definition): Offer Letter ⋮

4 minute(s) ago

Many details of the Offer will automatically populate based on the details previously provided.

Do not make any changes to the signing area or the "signhere" text. Electronic signatures via DocuSign will be part of the next step.

Document Name Offer Letter

Document * Format ▾ B I U A ▾ ☰ 🔗

01/23/2024

Andrea Jones
123 Oak Street
Portland , Oregon 97209

Dear Andrea ,

I am delighted to offer you the position of **Office Manager** at Willamette University effective 01/29/2024 . This position is an exempt position (i.e., it is not eligible for over-time). Your annual salary is \$54,000.00 with paydays on the last working day of each month.

[NOTE TO SUPERVISORS: If position is less than 1.0 FTE, or less than 12 months please note the same, for example, "This position is for 10 months, from August through May. During those months, your FTE will be ___- You will not be expected to provide services to the University in June and July.]" DELETE this message before submitting offer letter for review.

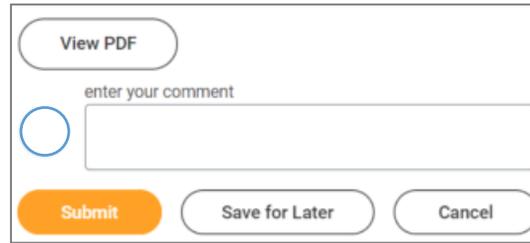
This position is eligible for university benefits. Please note that appointments that are less than full time may not be eligible for all benefits, or benefits may be prorated. Full details of our benefits program, including employee costs, can be found online through the Office of Human Resources website: <http://willamette.edu/offices/hr/benefits/index.html>. Most benefits begin on the first of the month following your date of hire. Please note that currently, employees are required to contribute 1% of their salary to the retirement plan as a condition of employment and may contribute up to the maximum elective deferral as defined by Internal Revenue Code.

Shortly after accepting your offer, you will receive an email message from Workday®, our university's HRIS (Human Resource Information System) with instructions on how to set up your Workday employee account. From there you will receive on-boarding instructions which will include new hire paperwork to be completed on or before your first day. We want to make your hiring process and start at the University to be as smooth as possible. Please do not hesitate to reach out to me or Willamette's Human Resources team (503-370-6210) with any questions.

Yours sincerely,
SignHere1

Diane Wu , Marketing (Diane Wu)
Director of Marketing

4. If you wish to preview the offer letter in PDF format, you may do so by clicking **View PDF**. As desired, you may also include any notes to HR you wish to communicate. When ready, click **Submit**. The offer letter is forwarded to HR for review and approval.



5. Once approved by HR, you will receive a task to sign the offer letter. Clicking on the task will open up the offer letter in DocuSign. Sign and submit.

Please note that if HR finds areas that need to be corrected, it will be necessary for them to reset the process, and you will need to repeat confirming hire date and salary described in the Confirm Job and Compensation Details section above.

Another item to be aware of is that both the candidate for hire and you will receive a notice to sign the offer letter at the same time. However, the candidate cannot sign the letter until after you have signed it. Therefore, it will be helpful for you to either sign the offer upon receipt or make the candidate aware that they will need to wait until you sign prior to adding their signature.

Initiating Set Up Tasks for New Hire

1. Once the offer letter has been signed in DocuSign, you will receive a task called Make Offer Decision in Workday which will place the new hire in the Ready to Hire stage in the recruiting funnel.
2. After the New Hire is moved to the Ready to Hire stage, HR receives a task to review the hire form information for accuracy and approve it.
3. Once approved by HR, the supervisor will receive two more tasks in Workday, **Propose Compensation Hire** and **Change Organization Assignments**. All the information in these forms will be prepopulated based on previous information entered, so it will just be necessary for you to review for accuracy and approve each task. If you find any errors, you can correct them in these tasks.
4. If the new hire is filling a faculty or adjunct position, the academic partner will receive a task to create the Academic Appointment at this stage. Also, Period Activity Pay for adjunct employees will be entered by the fiscal officer if applicable.
5. Next, Workday sends out notice to the new employee for user name and password creation. HR then adds the probation period and onboarding tasks start being emailed to the new hire to complete.

Direct Hire Process

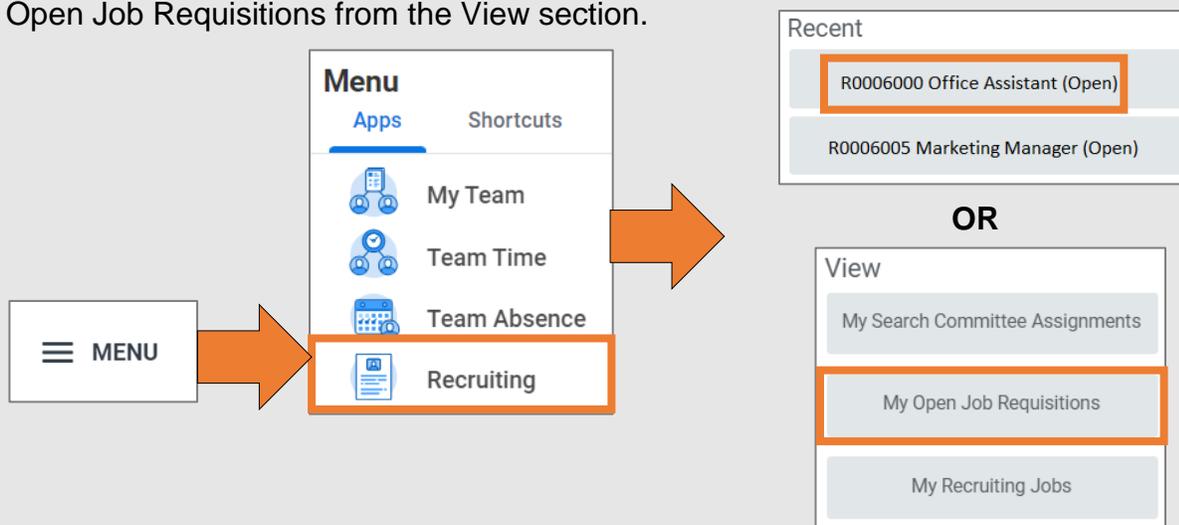
There are times when you may already have a candidate to fill a position without needing to go through a recruiting process. The description below explains the process for doing so. Most of the steps are the same, but there will be times where information will be entered later in the process than when hiring a candidate who has been hired through the recruiting module because it has not been gathered through the regular application process.

Contact Human Resources

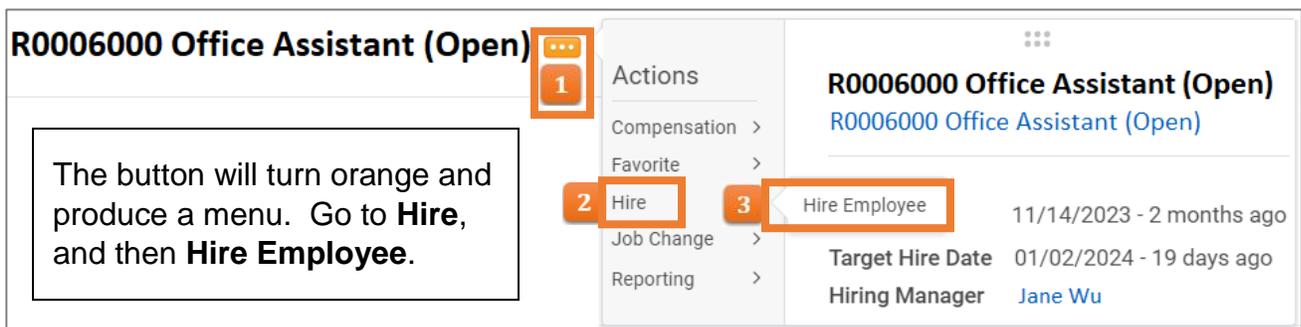
The hiring Manager or designee contacts Human Resources to inform them of their desire to hire a candidate directly. If there is no existing information for the candidate in Workday, HR will gather information from the hiring manager to create a Pre-hire profile in Workday containing essential information about the candidate to enable the process to proceed.

Initiate the Hire from the Requisition

1. Select recruiting from the menu list and then select the position for hire from the Recent section at the bottom of the screen. If it is not present you can search for it by clicking My Open Job Requisitions from the View section.



2. After accessing the requisition, click on the actions button to the right of the job title.



3. Enter the candidate name in the following form and click **Search**. Since HR has set the candidate up as a pre-hire, they will already have information in Workday.

Search for Person

Country *

First Name Email Address ID Type

Middle Name Country Phone Code

Last Name Phone Number

4. From the results, click the box next to the candidate's name and then click **Start Hire**. You will receive a summary screen with more information. Click **OK** to continue.

1 Search Result

Alex Jones

[Details](#)

Hire Employee

Alex Jones

Details

Pre-Hire

Profile

Pre-Hire ID Pre-0000981

Recruiting Source Higher Ed Jobs

Supervisory Organization * Jane Wu

Job Requisition R0006000 Office Assistant

5. Key information will prepopulate in the following form under Job Details. In the Working time section, click in the Frequency field and select Monthly. In the Unit field, select Hours. In the Value field, enter the number of months a year the new employee will work. Open up the Additional information section and replace the content in the Job Title field to the actual job title. This will automatically update the Business Title field. Click .

Hire Date *

Reason

Job Details

Position *

Job Requisition R0005453 Office Manager (Open)

Employee Type * Staff

Job Profile *

Time Type * Full time

Location *

Work Space

Pay Rate Type

Working Time

Location Weekly Hours 40

Default Weekly Hours

Scheduled Weekly Hours

FTE 100%

Work Shift

Frequency

Unit

Value

Additional Information

Job Title

Business Title

Job Information Review and Approval

1. Human Resources runs a background check on the candidate, then informs you that it has been completed successfully.
2. You then receive two tasks in My Tasks--Change Organization, followed by Change Compensation. Review the information in each task and modify as needed, clicking **Submit** when done with each task.
3. Human Resources reviews and approves the hire information.
4. If applicable:
 - Add Activity Pay. Please refer to the separate job aid describing the steps for doing so.
 - The Academic Partner adds Academic Appointment information.
 - If the hire was initiated by someone other than the hiring manager, the Hiring Manager and then the Department Head will be given a task to approve the hire.

Offer Letter and Onboarding Initiation

1. The new hire Workday account is created, or if applicable, reset. The new employee receives temporary Workday credentials.
2. You will have a task in your My Tasks inbox to upload an offer letter. Offer letters for direct hires are created and completed outside of workday. Create the offer, sign it and have the new hire sign it. It will then be uploaded into Workday. Connect with HR if you have questions on using offer letter templates or distribution of offer letters to direct hire candidates.
3. Onboarding tasks now begin for the new hire.