



## People and Money system

We know this format may not be accessible for all. To request this guide in a different format please email [hrhelpline@ed.ac.uk](mailto:hrhelpline@ed.ac.uk).

### How to Create and Manage a Job Offer

Hiring Manager and School/Department Administrator or Business Support

Estimated time to complete: 12 minutes

Please familiarise yourself with the [Guide to Recruitment and Onboarding](#).

This guide includes the steps for how to create, redraft and extend a job offer to a candidate. A redraft may be required if the job offer is rejected by HR Operations, or if it is rejected by the candidate, but the steps involved are the same.

Only the recruiter, hiring manager or offer specialist within the offer team can submit/edit an offer, collaborators are no longer be able to submit or edit the offer, this can be updated by the Recruiter by adding you as an Offer Specialist within the offer team.

Please do not download and edit an offer letter from the People and Money Offers page.

Please refer to the offer letter [template library](#) to select, edit and save your offer letter in PDF format (to avoid editing) **prior** to completing the on-system steps.

If the candidate requires a PVG check for the role, please ensure the relevant clause from the template is included in the offer letter. Further guidance is available on the [Disclosure/PVG Checks](#) webpage.

Uploaded attachments are separated into **Candidate Facing** which are made available to the candidate and stored in the new hire's Documents of Record for future reference, and **Internal Documents** which are only visible to internal users e.g the recruiting team and HR Operations.

Please ensure that any **position** changes are made prior to the job offer being drafted.

You must add **allowances** (if applicable) to the **Other Compensation** section. If the allowance you need is not listed please add this to the comments and attachments section.

The **Default Expense Account Code** must be added for all pending workers. This enables users to submit any future expense claims. This will be captured within the approved Job Requisition Business Case (JRBC) Form.

You can track the progress of the approval for an offer once submitted, see the section below on [Checking Offer Approval](#).

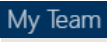
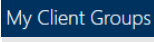



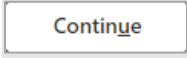
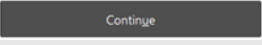
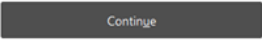
You can now **copy a job offer** where there are multiple or bulk offers to be extended. Please see the step-by-step details [below](#).

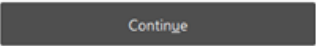
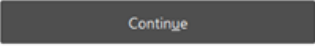
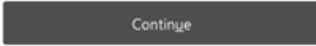
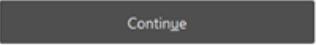
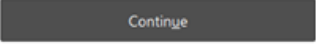
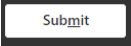
### Quick Links to in Detail

- [Creating a Job Offer](#)
- [Saving a Draft Job Offer](#)
- [Editing a Draft Job Offer](#)
- [Extend a Job Offer](#)
- [Redrafting a Rejected Job Offer](#)
- [Copy Job Offer](#)
- [Checking Offer Approval Status](#)

In Brief...

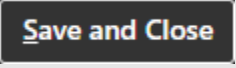

### Creating a Job Offer

1. From the **Home** page:  
click **My Team**  if you are a Line Manager or Hiring Manager, or  
click **My Client Groups**  if you are Business Support or School/Department Administrator.
2. Select the **Hiring App** 
3. Click on the relevant requisition in the **Job Requisitions** page.
4. In the **Overview** page, click on **Active Applications**.
5. Select the candidate with **Offer, To Be Created** status.
6. Click the ellipsis  button next to the candidate with the status **Offer, To Be Created**, and select **Create Job Offer** 
7. Select all the tiles in **Create Job Offer** page and click **Continue** 
8. Complete the **When and Why** section and click **Continue** 
9. Complete the **Assignment Info** section and click **Continue** . Enter 0 hours per period into **Working Hours** field for Guaranteed Hours employees. You must enter the **default expense account code**, see full details below.

10. Review the **Offer Team section**. Remove any members that should not have access to offer information. Note that only the recruiter, hiring manager or offer specialist can raise or edit a job offer.
11. Complete the **Salary** section and click **Continue** 
12. Complete the Other Compensation section should any **allowances** be required. Click **Continue**  in **Other Compensation** to move to the next section. (Use the comments section to list any not available in the app).
13. **Comments and Attachments** Use this section to provide comments and add attachments while drafting or editing job offers. These are visible to internal users and approvers, but not to candidates. You should include the details of any allowances you were unable to select in the additional compensation section. Click **Continue**  to move to the next section
14. Complete the required fields in the **Additional Info (for GH, Annualised and Fractional offers)** section and click **Continue**. 
15. Complete the **Offer Letter Section**, select the offer letter Offer Email Text and an expiration date (if required). Upload the pre-prepared offer letter and job description in the **Candidate Facing Documents** section then click **Continue** 
16. Click **Submit**  to send the job offer for approval.

For detailed guidance, see the [next section](#).

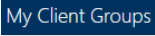
## Saving a Draft Job Offer



1. In the job offer, complete the section that you are editing, ensuring there is no data missing from mandatory fields.
2. Click **Save and Close** 
3. The **Job Applications** page opens, and the status of the candidate with the unfinished offer is shown as **Offer, Draft**.
4. Click the **Home**  button to return to the Home page.

For detailed guidance, see the [next section](#).

## Editing a Draft Job Offer

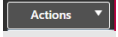

1. From the **Home** page:  
click **My Team**  if you are a Line Manager or Hiring Manager, or

click **My Client Groups**  if you are Business Support or School/Department Administration.

2. Click the **Hiring App** 
3. In the **Job Requisitions** page and click on the relevant requisition.
4. In the **Overview** page, click on **Active Applications**.
5. Click the ellipsis  button next to the candidate with the status **Offer**, **Draft** and select **Edit Job Offer**.
6. In the **Edit Job Offer** page select all the tiles and then click **Continue**.
7. Click on the **Continue** button until you navigate to section that you want to edit or to continue working from.
8. Refer to the appropriate steps for **Creating a Job Offer** above to continue.

For detailed guidance, see the [next section](#).



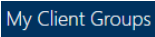
### Extend a Job Offer

1. Navigate to the **candidate** record
2. Select **Actions**  then **Extend Offer**
3. Click **Yes** 

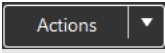

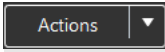
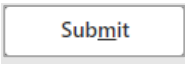
The offer will be extended to the candidate.

For detailed guidance, see the [next section](#).

### Redrafting a Rejected Job Offer

1. View the email received or click the **Bell**  icon to view the notification of the rejected job offer.
2. From the **Home** page:  
click **My Team**  if you are a Line Manager or Hiring Manager, or  
click **My Client Groups**  if you are Business Support or School/Department Administration.

3. Click the **Hiring App** 

4. In the **Job Requisitions** page, click on the requisition.
5. In the **Overview** page, click on **Active Applications**.
6. Select the candidate with the status **Offer, Approval Rejected**.
7. Click the **Actions**  button and select **Redraft Offer**.
8. Click **Yes** .
9. Click the **Actions**  button again and select **Edit Offer**.
10. Edit the job offer, following the steps taken to [create a draft offer](#)
11. Click **Submit**  to send the job offer for approval.

For detailed guidance, see the [next section](#).

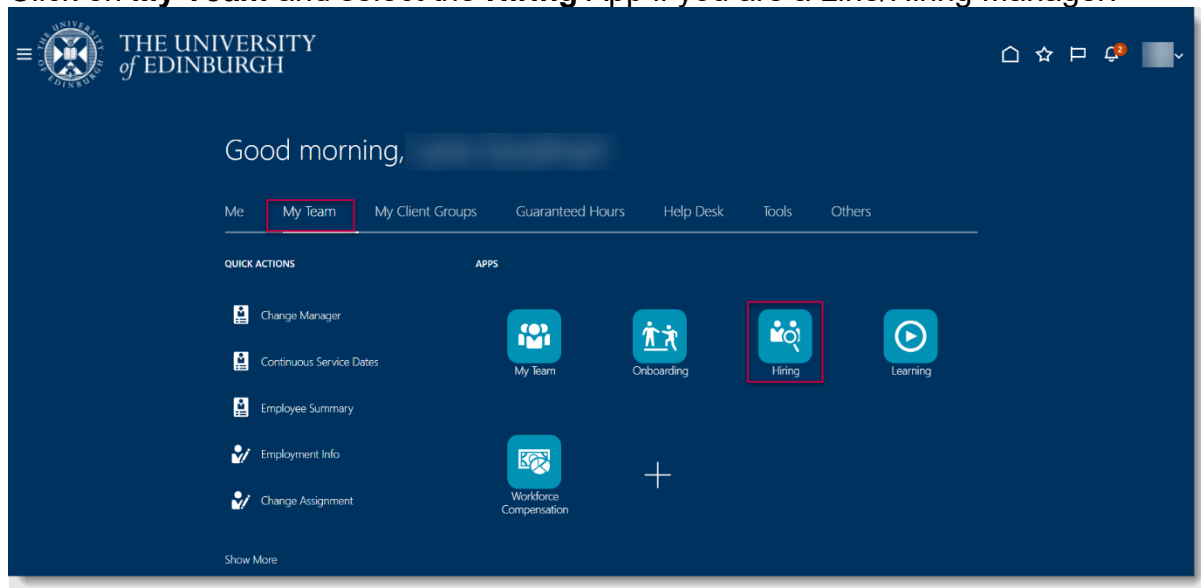
## Copy Job Offer

Please read the detailed guidance, in the [next section](#).

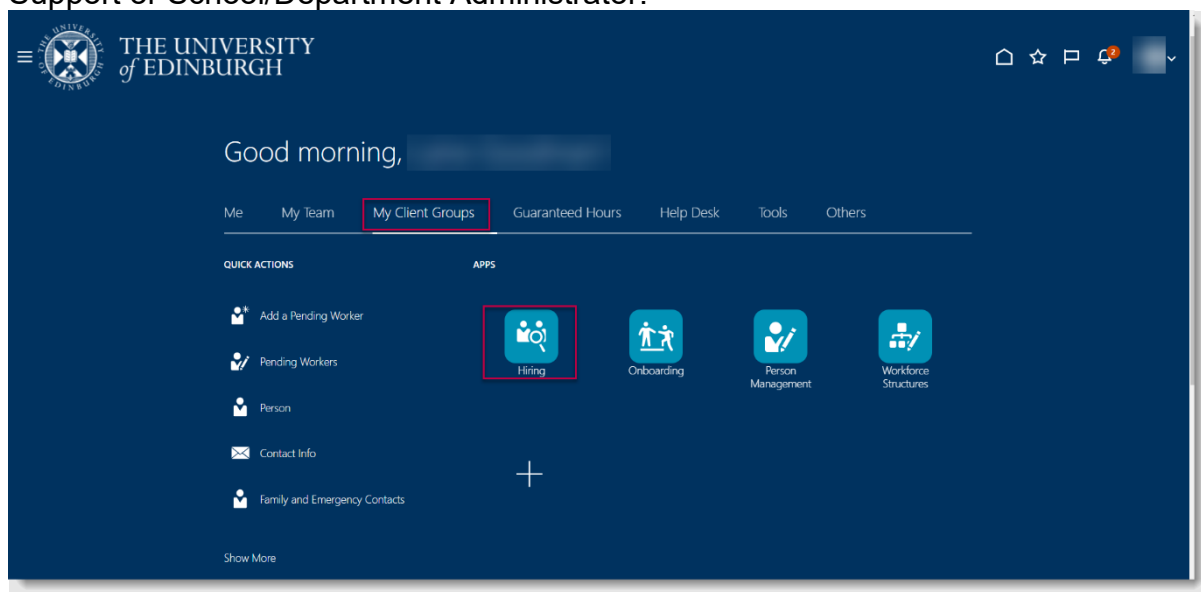
## Creating a Job Offer

1. From the **Home** page, either:

Click on **My Team** and select the **Hiring** App if you are a Line/Hiring Manager.



Or, click on **My Client Groups** and select the **Hiring** App if you are if you are Business Support or School/Department Administrator.



2. In the **Job Requisitions** page click on the relevant requisition.

The screenshot shows the 'Job Requisitions' page. The left sidebar has a menu with 'Job Requisitions' highlighted. The main area displays a table of requisitions. The second row, 'Administrator (293)', is highlighted with a red box. The table columns include Requisition Title, Status, Location, Applications, and Prospects. The 'Administrator (293)' row shows 'Open - Expired' status, 'Standard' type, 'United Kingdom' location, 65 Applications, and 0 Prospects.

Requisition Title	Status	Location	Applications	Prospects
Administrative Assistant (333)	Open - Expired	United Kingdom	113	0
<b>Administrator (293)</b>	Open - Expired	United Kingdom	65	0
Administrator (C1) (PAO - Administration) (79)	Approval - Pending	United Kingdom	0	0

3. In the **Overview** page, click on **Active Applications**.

The screenshot shows the 'Administrator: Overview' page for requisition 293. The left sidebar has a menu with 'Overview' highlighted. The main area displays a summary of application statistics and key highlights. The 'Active Applications' statistic is highlighted with a red box. The 'Key Highlights' section shows details about the requisition status, type, number, and hiring manager.

Statistic	Value
New - To be Reviewed	65
<b>Active Applications</b>	65
Hires Out of 1	0
Unconfirmed Applications	0
Referred Prospects	0

**Key Highlights**

Field	Value
Requisition Status	Open - Expired
Requisition Type	Standard
Requisition Number	293
Hiring Manager	Liz Thomas
Recruiter	Liz Thomas
Recruiting Type	Standard
Primary Location	United Kingdom

1. Click the ellipsis button next to the candidate with the status **Offer, To Be Created**, and select **Create Job Offer**.

The screenshot shows the 'Job Applications' page for requisition 293. The left sidebar has a menu with 'Job Applications' highlighted. The main area displays a table of job applications. The 'Create Job Offer' option in the actions menu is highlighted with a red box. The table columns include Candidate Name, Status, and Actions. The 'Create Job Offer' option is available for candidates with the status 'Offer, To Be Created'.

Candidate Name	Status	Actions
[Redacted]	New, To be Reviewed	[Ellipsis]
[Redacted]	New, To be Reviewed	[Ellipsis]

**Actions Menu:**

- Send Message
- Send Message to Team
- Collect Feedback
- Create Job Offer**

2. Select the tiles in the **Create Job Offer** page and then click **Continue**. Other Compensation (for allowances) and Additional Info (for GH, Annualised & Fractional info)

3. Enter or update the **When and Why** section and click **Continue**.

Select the **Action reason** as follows, (you may need to type the action name to find it):

**Add Pending Worker** – Used when an external candidate is taking on a new assignment. Only used when no previous work relationship exists.

**Add Assignment** – Used when existing employees are taking on an additional assignment

**For Internal Secondments** the **Add Assignment** action should be used when single assignment holders are **moving in part** to secondment and retaining time in substantive post OR a multiple assignment holder moving from one of their assignments **in part to secondment**.

**Transfer** – Used when an existing employee is leaving their current assignment(s) to take on a new assignment.

**Secondment**- used when single assignment or multiple assignment holder is **moving in full** to secondment.

**Add Pending Worker Relationship** – for rehires

4. Update the **Assignment Info** section, making sure to populate all mandatory fields, annotated with a \*. Click **Continue**.

2
Assignment Info

\*Business Unit

University of Edinburgh

Projected End Date

dd/mm/yyyy

\*Position

Catering Assistant (A1) (PAO - Hospitality)

Job

Catering Assistant (A1) (PAO - Hospitality)

\*Personal Job Title

Catering Assistant (A1) (PAO - Hospitality)

Grade Ladder

University Grade Ladder

\*Grade

UE02

Step

UE02 - Step1

Department

ACE Catering

\*Location

C&E Operations

Building

100% Off campus working (Approved flexible working only)

Select a value

Worker Category

Select a value

\*Assignment Category

Fixed Term

Working Hours

35

Weekly

FTE

1

Start Time

8.30.AM

Working as a Manager

No

Fixed Term Reason Code

Student experience post (UoE student)

NHS Honorary Contract

Contract Review Date

dd/mm/yyyy

\*Research/Teaching&Research/Teaching Only

1

\*HESA Activity Standard Occupational Classification

Chief Executives and Senior Officials

\*HESA Level

UCEA Level 2

HESA Reason for End of Contract

Clinical Increment Date

dd/mm/yyyy

Off-Campus Working Days (Approved Flexible Working only)

\*Default Expense Account

110.110002.40022003.2410.01

Continue

Field Name	Guidance for completion
Business Unit*	Select relevant BU
Projected End Date	For fixed term contracts please provide
Position*	Populate this field if you have created a job requisition from a template or blank requisition.
Personal Job Title*	This automatically populates with the position name so <b>it should be overwritten for a meaningful job title</b> . This will also impact on correspondence e.g. contracts
Grade Ladder*	Defaults to appropriate
Grade*	As above
Step	Grade Step
Department	Select the relevant department
Location*	Location where employee will be based
Building	If applicable
100% Off Campus Working	Yes or No - Only to be updated to 'Yes' where it has been agreed that the employee will work 100% of time off campus.
Worker Category	Select the relevant worker category e.g Guaranteed Hours
Assignment Category*	Select the appropriate from the dropdown, e.g open ended, fixed term. Select Secondment when moving in full or part to a secondment post.
Working Hours	Defaults to 35 per week but can be amended, must be a weekly figure.

	For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
FTE	Automatically populates based on Working Hours
Working as a Manager	Yes/No
Fixed Term Reason Code	Must be provided for fixed term contracts.
NHS Honorary Contract	If applicable
Contract review Date	If applicable
Research/Teaching&Research/ Teaching only*	<p><b>1 - Academic Contract that is teaching only</b> (applies only to contracts indicating that staff are teaching only. Teaching should include all related activities such as tutoring and preparation).</p> <p><b>2 - Academic Contract that is research only</b> (should be used for those contracts where the primary academic employment function is research only, even though the contract may include a limited number of hours teaching (up to 6 hours per week or pro-rata for part-time staff)).</p> <p><b>3 - Academic contract that is both teaching and research</b> (applies to contracts that include 6 or more hours of teaching per week (averaged over the number of actual teaching weeks) as a minimum (pro-rata for part-time staff) and the remaining contract hours as research only).</p> <p><b>4 - Non academic contract</b></p> <p><b>9 - Academic Contract that is neither teaching nor research</b> (should be used for academic contracts where the primary employment function is not teaching and/or research).</p> <p>If a contract is for both academic and non-academic work then the appropriate code from 1 to 3 should only be used where the primary employment function is teaching and/or research.</p>
HESA Activity Standard Occupational Classification*	HESA Activity Standard Occupational Classification-select the appropriate option. For subsidiaries please select the code which matches closest the type of role. For subsidiaries this information will not be returned as part of the HESA submission. For HESA Standard Occupational Classification view this link <a href="#">Staff 2023/24 - Activity Standard Occupational Classification   HESA</a>
HESA Level*	This is now a mandatory field, please use the <a href="#">table below</a> to select the appropriate HESA level according to the grade of the position being offered. Note staff in subsidiaries should use 'XperthR Level N' in all instances.
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	<p>If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home).</p> <p><b>Note</b> - It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a <b>150 character limit</b>.</p>
Default Expense Account Code*	Must be added – please refer to the approved Job Requisition Business Case Form.

	Please note in most circumstances the default expense account code will be the same as the salary costing code. The default expense code cannot be split.
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## HESA LEVEL

STAFF LEVEL CODE	STAFF LEVEL DESCRIPTION	GRADES ASSIGNED TO STAFF LEVEL CODE	ADDITIONAL CRITERIA
A0	Vice-Chancellor/Principal/Head of Initiation	Principal only	
B0	UCEA level 2	Vice-Principal/University Secretary	
C1	UCEA level 3A	Report to run by HR to identify this grouping	
C2	UCEA level 3B	College Registrar	
D1	UCEA level 3/4A1	Report to run by HR to identify this grouping	
D2	UCEA level 3/4A2	Report to run by HR to identify this grouping	
D3	UCEA level 3/4A3	Report to run by HR to identify this grouping	
E1	UCEA level 4A	XM1	
E2	UCEA level 4B	Report to run by HR to identify this grouping	
F1	UCEA level 5A	AC4, AM4, ACN4, AMN4, ACT4, AMT4 UE10 / OTHS <b>Academic</b> staff	
F2	UCEA level 5B	UE10 / OTHS <b>Non-Academic</b> staff (e.g. Professional services staff)	
I0	XperthHR level I	UE09, ECA8, AC3A, AC3B, ACN3, ACT3, AM3A, AM3B, AMN3, AMT3, ARW2, XM2A, XM2B	ARC ON SPINAL POINT 39, 40, 40, 44, 45, 46, 54, 58, 62, 66
J0	XperthHR level J	UE08, ECA7, AC2, AM2, ACN2, AMN2, ARW1, MC3, XM3A, XM3B, RCB3	ARC ON SPINAL POINT 37, 38, 49, 50, 60, 61, 65
K0	XperthHR level K	UE07, UE7N, ECA6, MC2, AFC7, ECA6, XM4A, XM4B, RCB4	ARC ON SPINAL POINT 29, 30, 30, 36, 41, 42, 47, 48, 51, 52, 53, 55, 56, 57, 59, 63, 64
L0	XperthHR level L	UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375	
M0	XperthHR level M	UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B	
N0	XperthHR level N	UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A	
O0	XperthHR level O	UE02, ECA2, RCB8	
P0	XperthHR level P	UE01, ECA1	

## Default Expense Account Code

These are mandatory fields. Select the icon at the right of the field

Default Expense Account



Complete all fields as per the details under 'Default Expense Account Code' on the approved Job Requisition Business Case form. Then press OK. The table below shows the default values, you must use the cost centre relating to the school or department.

	Code to use
Entity	110
Fund	110002
<b>Cost Centre</b>	<b>From the JRBC Form</b>
Account	2410
Analysis	000000
Portfolio	00000000
Product	00000000
Intercompany	000

Default Expense Account

×

▲ Hide Segments

Entity

▼

Fund

▼

Cost Centre

▼

Account

▼

Analysis

▼

No Analys

Portfolio

▼

No Portfoli

Product

▼

No Produc

Intercompany

▼

No Entity

Spare 01

▼

No Spare :

Spare 02

▼

No Spare :

Search

Reset

|

OK

Cancel

5. Enter or update the **Offer Team** section and click **Continue**.

It is important to review the Offer team at this point, Offer team members are automatically populated with the Hiring Manager, Recruiter and Offer Specialist that were added when the requisition was set up. Offer team members will receive notifications and have access to offer information such as salary. **You**

must therefore review and remove any members at this stage who should not have access to this information.

**Note – It is only the recruiter, hiring manager or offer specialist within the hiring team that can submit/edit an offer.** For any offers that were raised prior to the 22C update (prior to 24 October 2022) the recruiter that raised the original offer can update the offer team ('add collaborator type') and add the offer specialist role to those who need it. If you experience any problems updating the offer team you should submit a service request>system related providing the requisition number.

3 Offer Team

Hiring Manager

Recruiter

Add Collaborator Type  Add Collaborator Type

Offer Specialist  Add Another Offer Specialist

Continue

6. In the **Payroll Info** section select UoE Group **Payroll** in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Click **Continue**.

4 Payroll Info

Payroll Frequency

\*Payroll

Other Info

\*Tax Reporting Unit

Continue

5 Salary

7. Select **Annual Salary** in the **Salary** section and click **Continue**.

5 Salary

\*Salary Basis  
Annual Salary

\*Salary Amount  
20,130.00 GBP Annually

Grade Name  
UE04

Grade Step  
UE04 - Step 1

Salary Range  
- GBP Annually

Annual Salary  
20,130.00 GBP (FTE 1)

Grade Ladder  
University Grade Ladder

New Salary  
**20,130.00** GBP Annually

Continue

6 Other Compensation

8. The **Other Compensation** section will be used to add details of **allowances**. There are 14 allowances that can be selected, click **Add** to populate this section.

- Acting Up Allowance
- Contractual Overtime
- Deans Honorarium
- Head of School
- London Weighting Allowance
- On Call Payment
- Overseas Supplement
- Premium Bands
- Responsibility Allowance
- Royal Society Award
- Secondment Allowance
- Wardens Allowance
- Wellcome Trust Allowance
- Wellcome Trust Fellowship


If the allowance you require is not listed please include this information in the comments and attachments section (step 9 below) below and use the 'Attachments-

Internal Document' to supply any supporting documentation/rationale.

6

Other Compensation

+ Add



There's nothing here so far.

Continue

In the example, note that the chosen **Plan** information will display in the dialog box and provide guidance.

6

Other Compensation

OK

Cancel

\*Plan

London Weighting Allowance

\*Option

London Weighting Allowance

\*Start Date

08/02/2022

End Date

08/02/2022

\*Amount

3,000.00

\*Periodicity

Annually

Work Units Conversion Rule

UoE Rate Annualized

Hours Worked

Pay Value

Hide Plan Info

Allowance Description

Payable to those who, as a condition of employment, are required to normally work in London or parts of Greater London and as a consequence are required to live in London or within daily commuting distance.

What information do I need to enter?

You must enter a start date and end date for this allowance. London Weighting in most cases will be ongoing with no end date, so you should enter 31/12/2066 in the end date field. If there will be a specific end date for the allowance you should add that date.

The 'Amount' field defaults to 3,000.00 and is the annual amount the employee will receive. Do not override this value. The annual amount will be divided by 12 (months in the year) and paid in monthly instalments to the employee.

Leave the 'Pay Value' field blank as this is for payroll use only.

Continue

7

Attachments

Select **OK** and a summary box will display.

Note that further Allowances may be added here by selecting

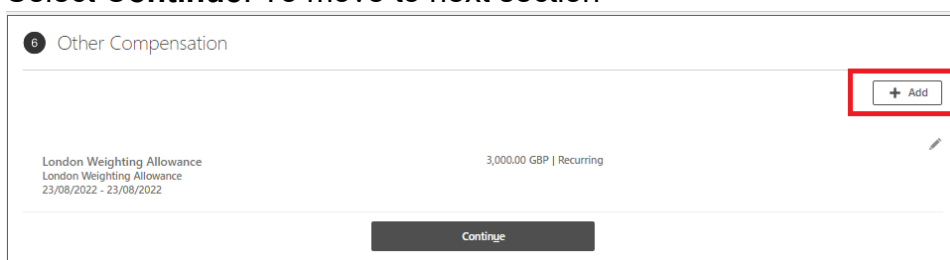
+ Add

PM1051

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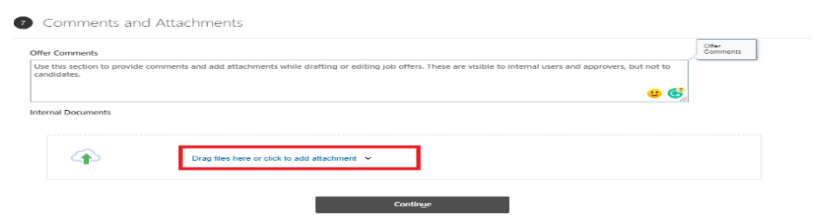
September 2025 25B

Select **Continue**. To move to next section



## 9. Comments and Attachments

Use this section to provide comments and add attachments while drafting or editing job offers. These are visible to internal users and approvers, but not to candidates. You should include the details of any allowances you were unable to select in the additional compensation section and use the Attachments-Internal Documents should there be any supporting documents/rationale you want to provide.



Click on the down arrow next to **Drag files here or click to add attachment**. Select **Add Files** and navigate to the location where the file is stored and select it.

Please note that the file name of any attachments added to internal documents must not exceed 75 characters (including spaces) as we have discovered that this is causing some records to fail during the HR processing stage. This may mean you need to rename the files before attaching them. HR Operations will reject the request if there are any attachments with a file name exceeding 75 characters.

10. Complete the required fields in the **Additional Info** section and click **Continue**. This is required for all Guaranteed Hours, Annualised and Fractional Contracts.

8

Additional Info

\*Contact Number for Hiring Manager

0131111111

Total number of hours for period (GH only)

Period hours cover (GH only)

Annually Reviewed (GH Only)

Number of hours per year (Annualised/Fractional only)

Number of weeks per year (Fractional only)

Term time only (Annualised/Fractional only)

Average weekly working hours (Annualised only)

Comments for HR Operations (Read only - from May 2022 use new comments section)

Continue

### For Guaranteed Hours Offers:

**In the Total number of hours for period (GH only) field** - enter the minimum hours to be guaranteed in the initial GH period.

**In the Period Hours cover (GH only) field** - select from one of the available drop down options (see below table in [Appendix 2](#) for guidance and description). **Please note you should only select one of the following options:**

- **Per Year** = if the contract is for a year or longer
- **Over Period of GHC** = if the contract is for less than a year

**In the Annually reviewed (GH only) field** - select whether you intend to review the GH minimum hours each year. For use in Per Year only, (see below table in [Appendix 2](#) for guidance and description).

**Annualised Hours Offer** – Enter **Number of hours per year** and **Average weekly working hours**. Select appropriate value for **Term time only**.

**Fractional Hours Offer** - Enter **Number of hours per year** and **Number of weeks per year**. Select appropriate value for **Term time only**.

**Comments for HR Operations** - no longer in use you should use the offer comments in previous screen.

11. In the **Offer Letter** section select the offer letter **Offer Email Text**, select an **expiration date (if required)** and **attach the offer letter and job description** to the candidate facing documents section. Please note that the **file name** of any attachments added to the candidate facing documents must not exceed 75 characters (including spaces) as we have discovered that this is causing some records to fail during the HR processing stage. This may mean you need to rename the files before attaching them. HR Operations will reject the request if there are any attachments with a file name exceeding 75 characters.

Offer Letter

Offer email text

Download

Drag files here or click to add attachment

Candidate Job Application Language  
American English

Expiration Date  
dd/mm/yyyy

Additional Text 1

Additional Text 2

Candidate-facing Documents

Drag files here or click to add attachment

12. Click **Submit** to send the job offer for approval.

## Saving a Draft Job Offer

It is not necessary to complete the job offer all at once as a draft copy can be saved and completed later.

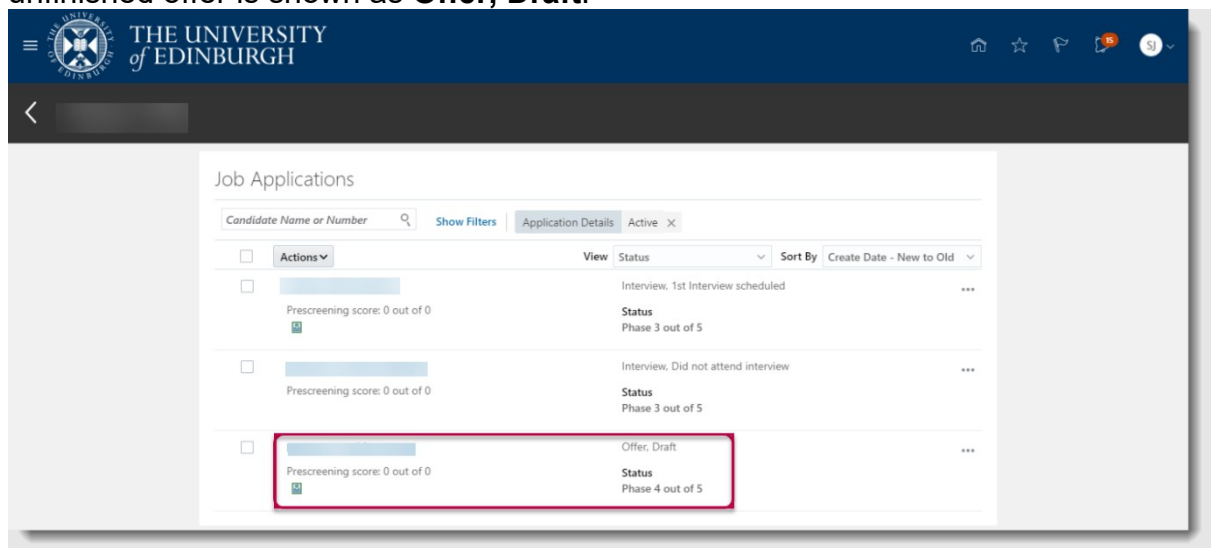
1. In the job offer complete the section that you are editing, ensuring there is no data missing from mandatory fields.
2. Click **Save and Close** in the black banner.

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Create Job Offer

Save and Close Submit Cancel

3. The **Job Applications** page opens, and the status of the candidate with the unfinished offer is shown as **Offer, Draft**.

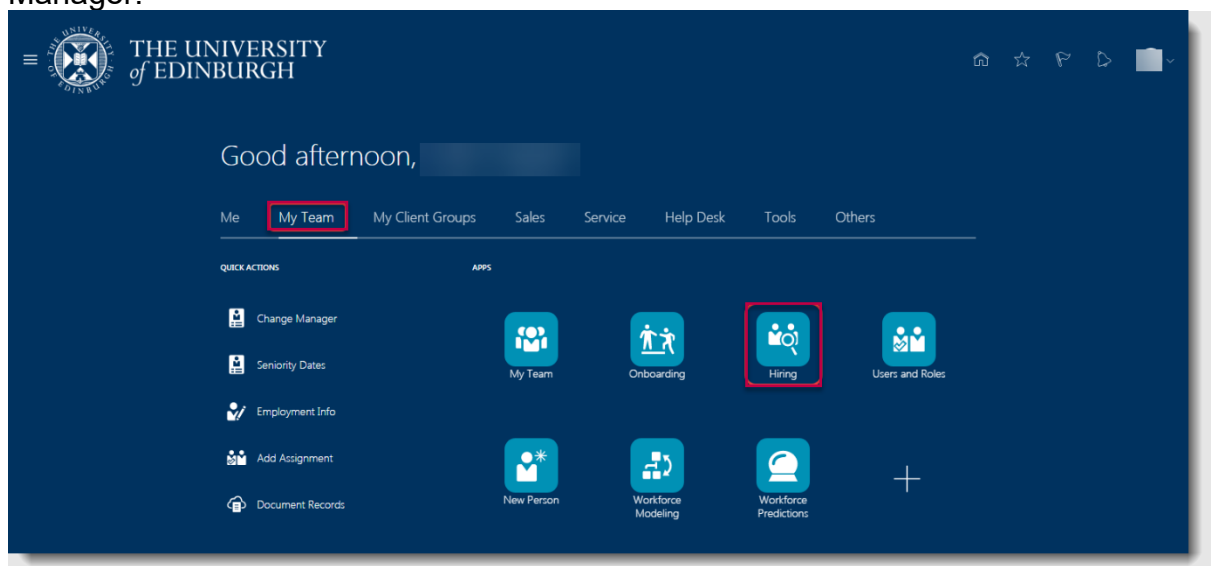


4. Click the **Home** button to return to the Home page.

### Editing a Draft Job Offer

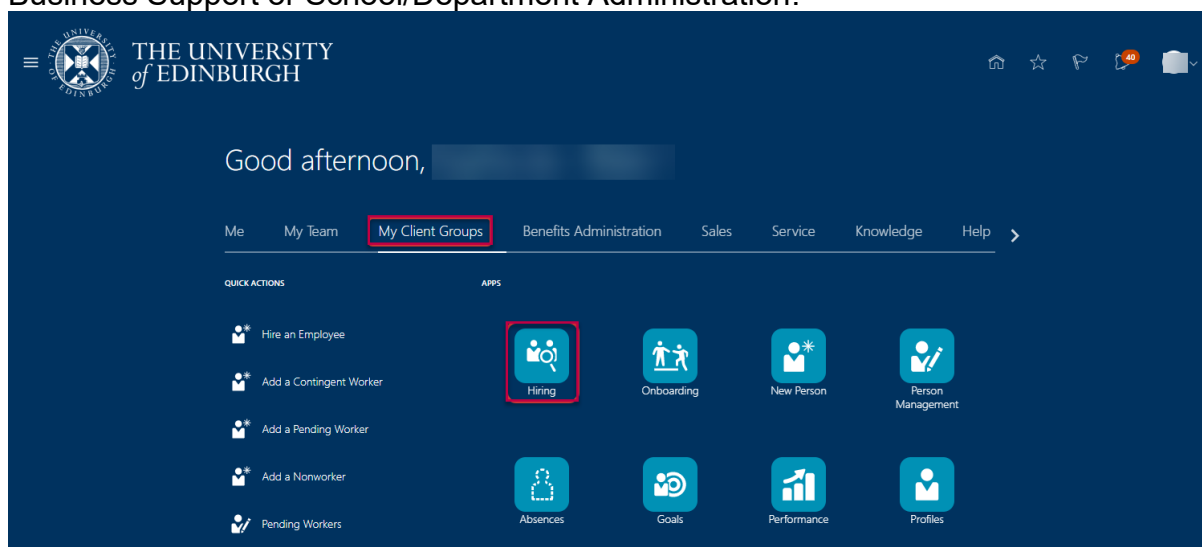
1. From the **Home** page, either:

Click on **My Team** and select the **Hiring** App if you are a Line/Hiring Manager.




Or

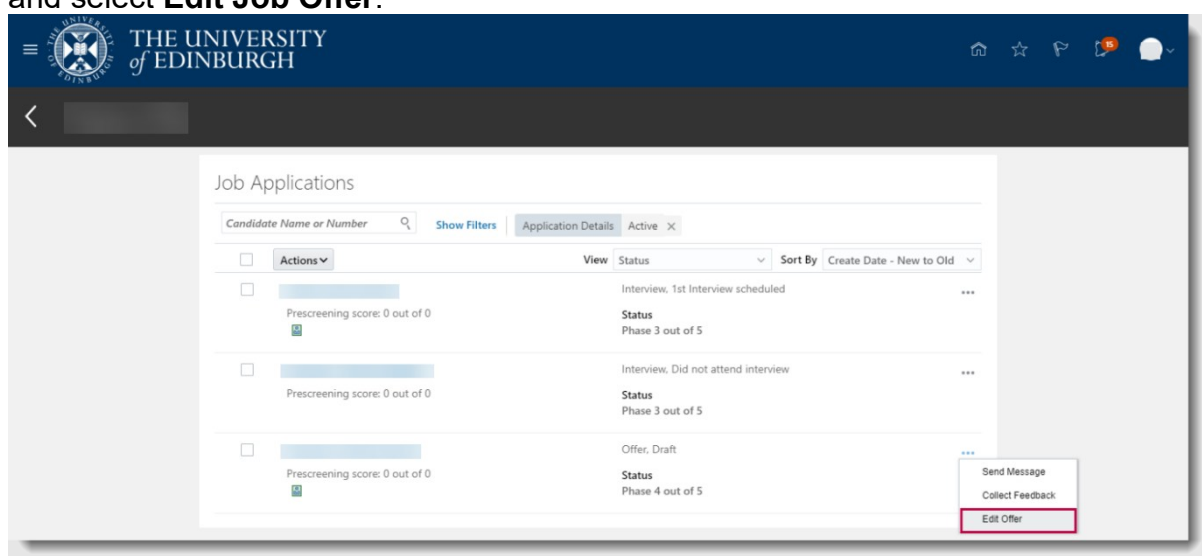
Click on **My Client Groups** and select the **Hiring** App if you are if you are Business Support or School/Department Administration.



2. In the **Job Requisitions** page click on the relevant requisition.

3. In the **Overview** page, click on **Active Applications**.

4. Click the ellipsis  button next to the candidate with the status **Offer, Draft** and select **Edit Job Offer**.



5. Select the tiles in the **Edit Job Offer** page and then click **Continue**. Other Compensation (for allowances) and Additional Info (for GH, Annualised & Fractional info

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Edit Job Offer

Continue Cancel

What would you like to do while working on this job offer?

☐ Other Compensation

☐ Additional Info

6. The job offers opens in section **1. When and Why**.

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Edit Job Offer

Save and Close Submit Cancel

**1 When and Why**

\*When is the employee start date? 5/10/2020

\*Action Promotion

\*Legal Employer University of Edinburgh

\*Worker Type Employee

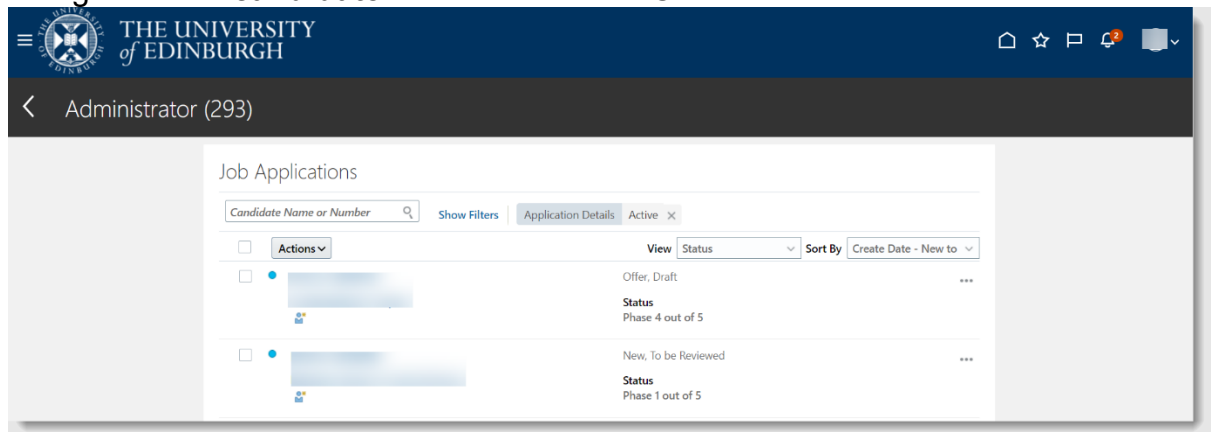
Continue

**2 Assignment Info**

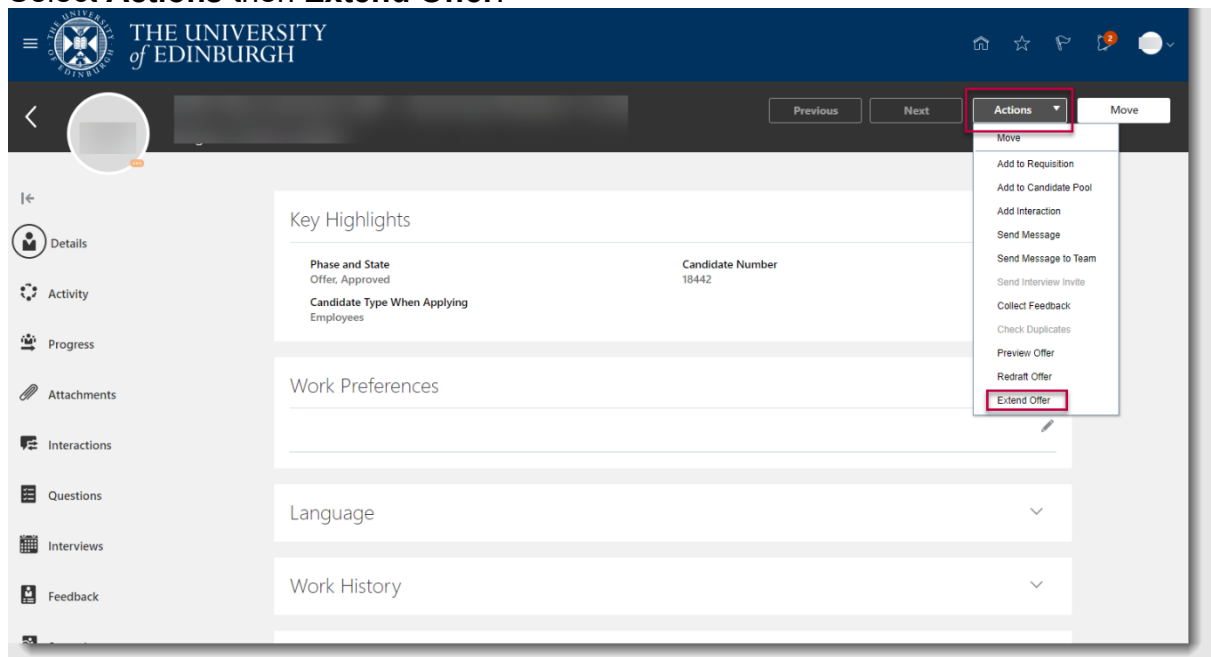
7. Click on the **Continue** button until you navigate to section that you want to edit or to continue working from.
8. Refer to the appropriate steps in [Creating a Job Offer](#) above to complete the offer.
9. Click **Submit** to send the offer to HR operations for approval

## Extend a Job Offer

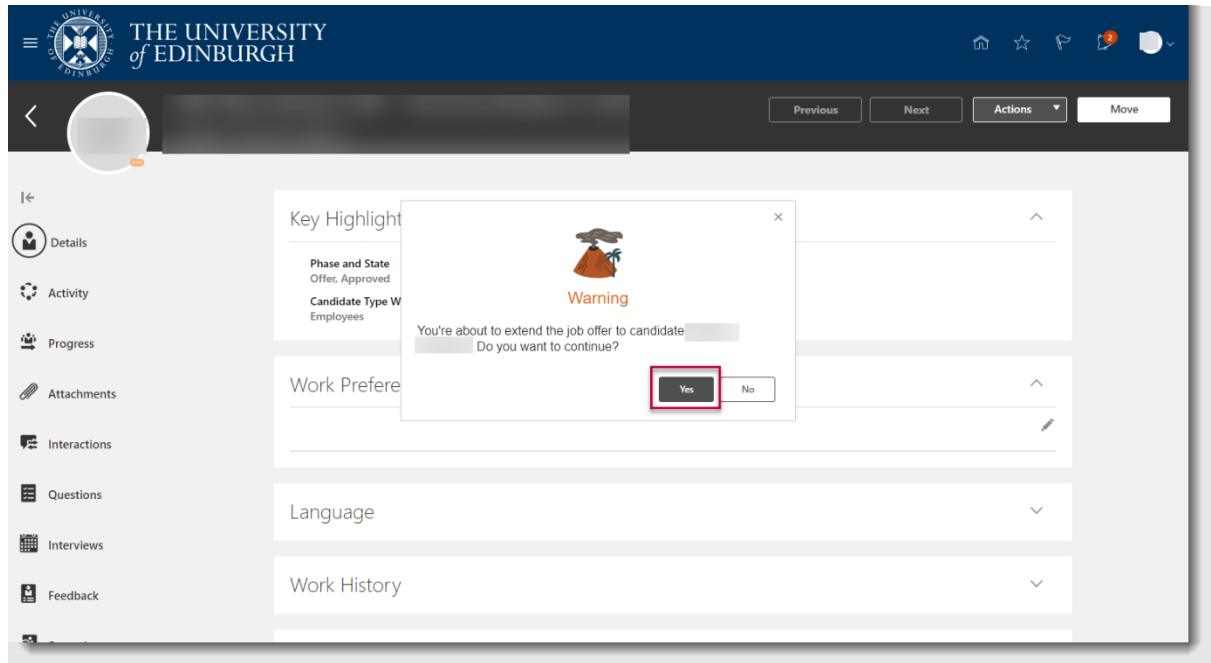
1. Navigate to the **candidate** record. Select the Candidate.



2. Select **Actions** then **Extend Offer**.



### 3. Click **Yes**.

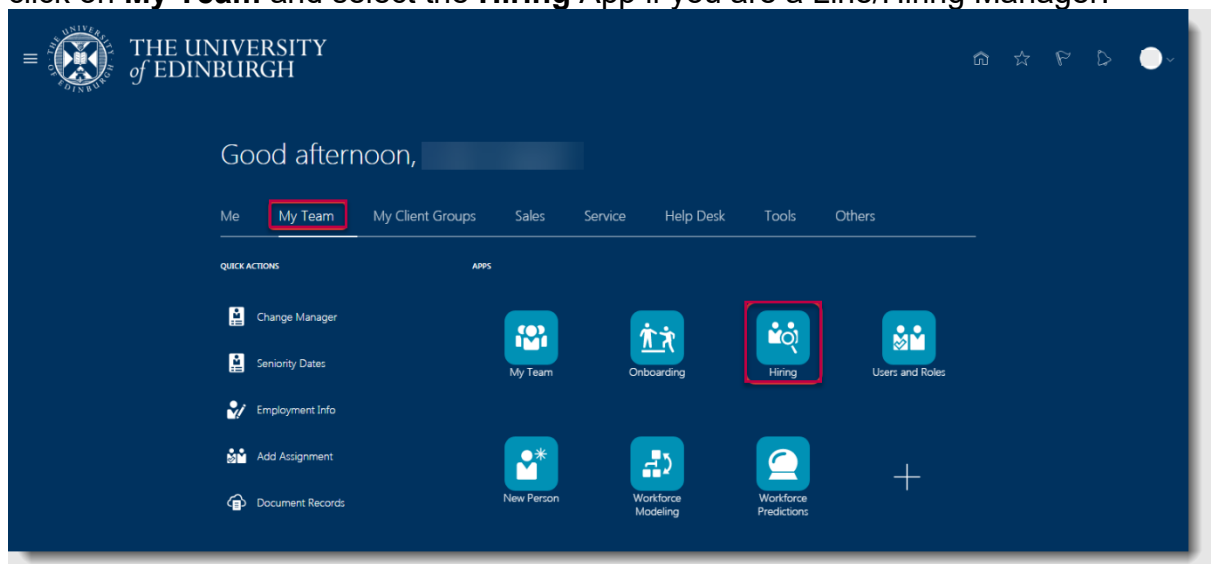


The offer will be extended to the candidate.

## Redrafting a Rejected Job Offer

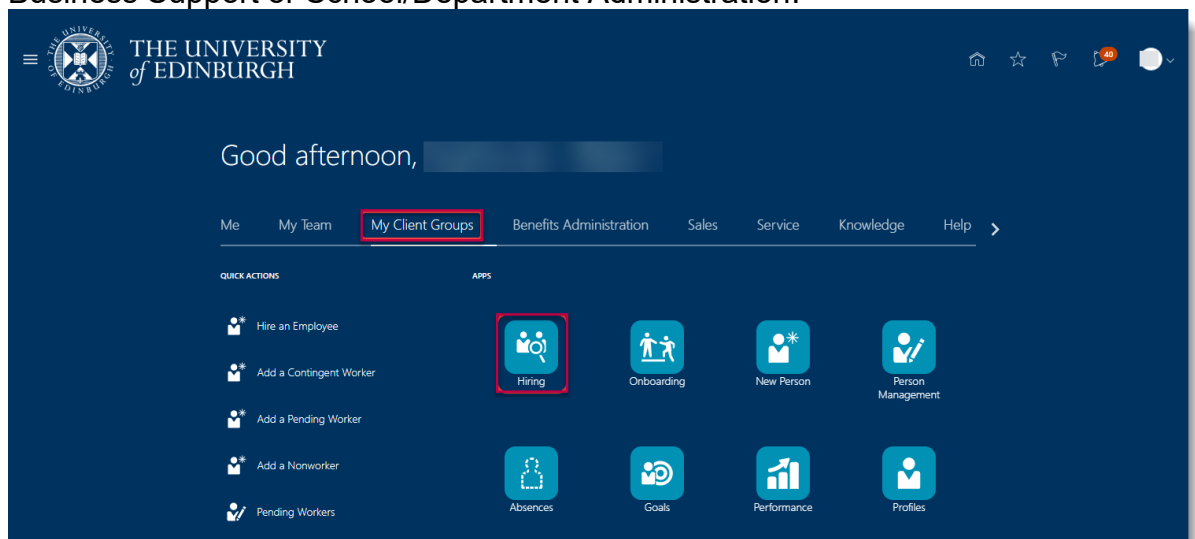
1. View the email received or click the **Bell**  icon to view the notification of the rejected job offer.
2. From the **Home** page, either:

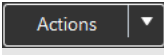
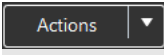
click on **My Team** and select the **Hiring** App if you are a Line/Hiring Manager.



Or

Click on **My Client Groups** and select the **Hiring** App if you are Business Support or School/Department Administration.



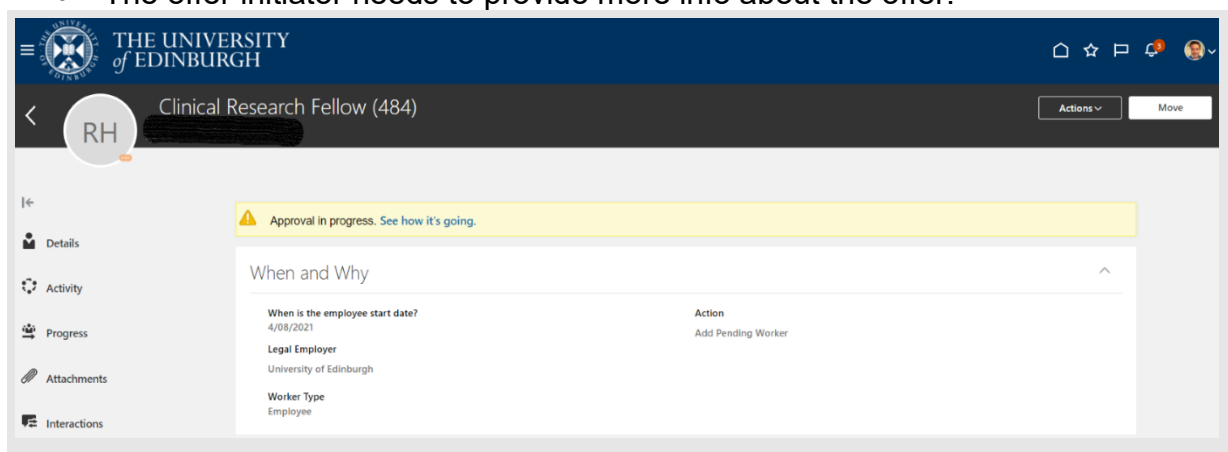
3. In the **Job Requisitions** page click on the relevant requisition.
4. In the **Overview** page, click on **Active Applications**.
5. Select the candidate with **Offer, Approval Rejected** status.
6. Click the **Actions**  button and select **Redraft Offer**.
7. Click **Yes** in the prompt to redraft the candidate's job offer.
8. Click the **Actions**  button and select **Edit Offer**.
9. Follow the steps in [Editing a Draft Job Offer](#) above to continue.
10. Click **Submit** to send the offer to HR operations for approval

## Checking the Offer Approval Process

Job offer initiators, approvers, and observers can track how job offers are moving through the approval process by viewing banners displayed on the job application's Details and Offer tabs. Job offer initiators and approvers can also click the **See how it's going** link on these banners to see more details, for example viewing the whole offer or seeing who the next approver in line is. They can also take actions on the offer such as approving or withdrawing it from approval.

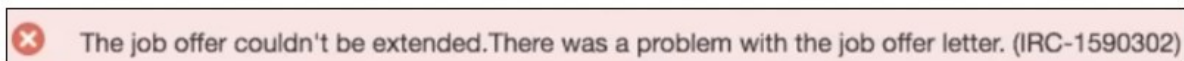
Banners are displayed when: -

- An offer is submitted for approval.
- An offer approval is underway.
- An approver requested more info about the offer.
- The offer initiator needs to provide more info about the offer.



Banner for Offer Approval in Progress Banners are also displayed on the job application's Details and Offer tabs when-

- An offer is extended
- An offer will be extended at a certain point in the future, if the selection process is configured to automatically extend job offers.
- There are any issues while trying to extend an offer.
- There are any issues while using the Move to HR action.



## Copy Job Offer

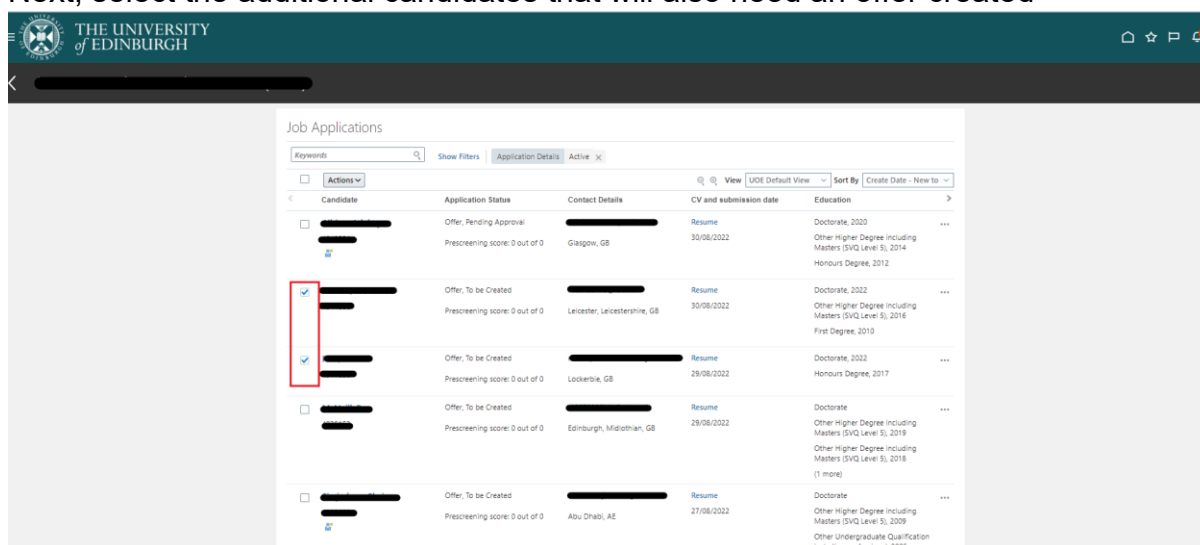
This functionality can be used to help hiring teams process multiple or bulk offers quickly where the offer details are the same. Note that it is only possible to copy offers for external candidates (new hires and rehires), this functionality is not possible for internal transfers or additional posts.

### Before you start

- You must start by creating one offer from the list of successful candidates
- All other application statuses should also be updated e.g. Rejected after interview
- Check that the number of openings on the requisition matches the number of offers you wish to copy. If more openings are required please send a Service Request using category 'Advertising' and title 'Increase Opening on Req # xxxx' to increase the number of openings before you continue, please attach the Job Requisition Business Case Form showing the approval of additional FTE. The system will flag an error if there is not enough openings.
- To copy an existing offer the person copying the offer must be part of the offer team for the first offer.
- It's preferable to select a recent offer to copy because it contains active values. Older offers on this requisition may no longer be selectable, or if they have values that aren't current anymore then the copying will be unsuccessful.

### In Detail...

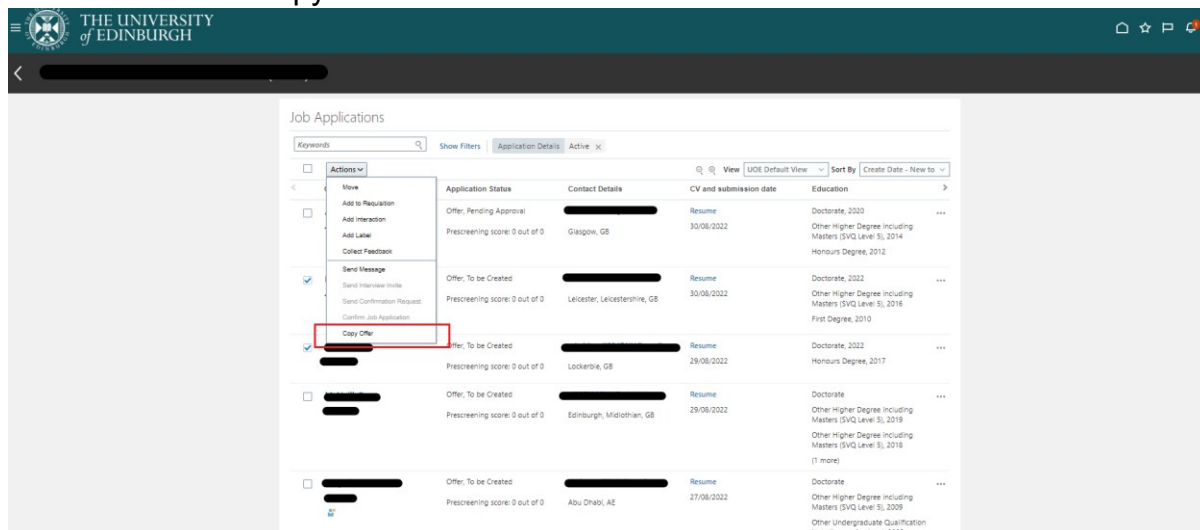
1. Create one offer from the list of successful candidates, following the steps above 'Creating a Job Offer' steps 1 to 16. The Job offer can be saved as a draft or can be submitted for approval.
2. Next, select the additional candidates that will also need an offer created



The screenshot shows the 'Job Applications' interface of The University of Edinburgh. It features a table with columns for Candidate, Application Status, Contact Details, CV and submission date, and Education. A red box highlights the checkboxes in the 'Candidate' column, indicating the selection process for copying offers.

Candidate	Application Status	Contact Details	CV and submission date	Education
<input type="checkbox"/>	Offer, Pending Approval Prescreening score: 0 out of 0	Glasgow, GB	Resume 30/06/2022	Doctorate, 2020 Other Higher Degree including Masters (SVQ Level 5), 2014 Honours Degree, 2012
<input checked="" type="checkbox"/>	Offer, To be Created Prescreening score: 0 out of 0	Leicester, Leicestershire, GB	Resume 30/06/2022	Doctorate, 2022 Other Higher Degree including Masters (SVQ Level 5), 2016 First Degree, 2010
<input checked="" type="checkbox"/>	Offer, To be Created Prescreening score: 0 out of 0	Lockerbie, GB	Resume 29/06/2022	Doctorate, 2022 Honours Degree, 2017
<input type="checkbox"/>	Offer, To be Created Prescreening score: 0 out of 0	Edinburgh, Midlothian, GB	Resume 29/06/2022	Doctorate Other Higher Degree including Masters (SVQ Level 5), 2019 Other Higher Degree including Masters (SVQ Level 5), 2018 (1 more)
<input type="checkbox"/>	Offer, To be Created Prescreening score: 0 out of 0	Abu Dhabi, AE	Resume 27/06/2022	Doctorate Other Higher Degree including Masters (SVQ Level 5), 2009 Other Undergraduate Qualification including professional, 2005

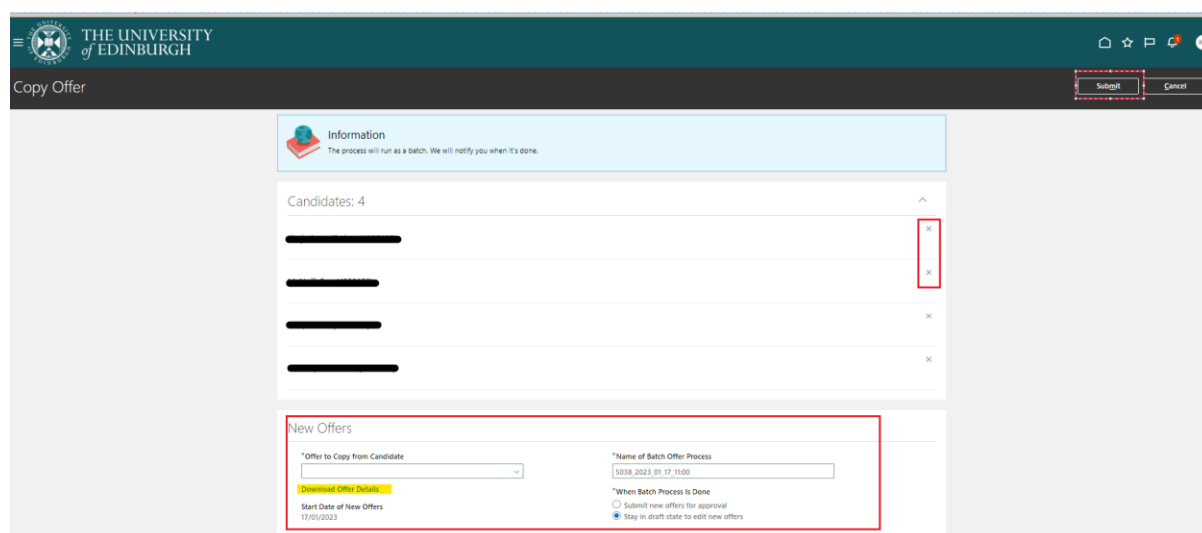
### 3. Click actions and copy offer



4. The next screen will show the candidates that have been selected. If you wish to remove any click the 'X'

5. Under the Offers section:

- In the "Offer to copy from candidate" select the candidate with the offer that you wish to copy (as previously created).
- Select the **start date** for the new offers
- In the Name of Batch Offer Process field, you can use the default name for the batch offer process which includes the requisition number and the current date and time. Or you can set a new one. This name is useful for tracking all of these newly-copied offers on the Job Offers list.
- Select "**Stay in draft state to edit new offers**" – This is because the individuals offer letter will need to be attached
- Then click **submit**



**Download Offer Details** - If the user wants to check the offer details for the candidate the offer is being copied for they can click "download offer details". This will generate a PDF table of the offer details for the offer being copied (see the below example).

All of the content and attachments on their offer will be copied to create new job offers for the other selected candidates

It's important to therefore ensure the "Stay in draft state to edit new offers" is selected so that the relevant candidate offer letter can be uploaded once the copy process has been completed.

#### UE07 - Step 1

Job Offer [REDACTED]

#### Offer Recipient Details

##### UE07 - Step 1

Display Name	[REDACTED]
Personal Email Address	[REDACTED]
Personal Phone Number	
Work Email Address	
Work Phone Number	
Home Address	
Candidate Type	ORA_EXTERNAL_CANDIDATE
Person Number	

#### Offer Details

Job Offer Title	[REDACTED]
Creation Date	1/12/2023 5:24:57 PM
Created By	[REDACTED]
Comments	
Phase	Offer
State	Draft
Accepted Date	
Accepted On Behalf	N
Accepted On Behalf By	
Accepted On Behalf Date	
E Signature Full Name	
E Signature IP Address	
E Signature Date	
Expiration Date	
Additional Text 1	
Additional Text 2	
E Signature Statement	Please provide your signature to accept your job offer.
Offer Letter Template Name	

#### Assignment Details

Assignment Name	[REDACTED]
Legal Employer	University of Edinburgh
Hire Date	1/12/2023
Worker Type	Employee
Business Unit Name	University of Edinburgh
Job Name	[REDACTED]
Grade	UE07

- Once the copy offer process has been submitted it will take a little while to process. You will be alerted when it is complete. You can also tell the process is complete because the Phase and State will change to Offer-Draft.
- You must now attach each individual offer letter for each candidate. Follow the steps in the section ['Editing a Draft Job Offer'](#), this also gives you an opportunity to check the offer details.
- Once you are ready submit the offer for HR approval

9. Once approved follow the steps to [Extend the Job Offer](#).

### What happens after submitting the batch copy offer process?

When you submit the Copy Offer action, here's what can happen:

- If the batch copy offer process is successful, all of the offer content and attachments on the offer are copied to create new job offers for the selected candidates.
- If there are warnings, the new offers still get copied.
- If there are errors, the batch copy offer process stops.

The table presents possible warnings and errors that can occur during the batch copy offer process.

Warning or Error	Scenario
Warning	The original offer letter was adjusted to include specific info about the candidate. You'll see a warning message asking you to update each new candidate's offer letter after it gets copied. Copies will then be created.
Error	The recruiter or hiring manager on the original offer is no longer working for the company. The batch copy offer process can't proceed. You'll see an error message asking you to select a different candidate's offer to be copied.
Error	The original offer has no salary amount or no offer letter, or the job requisition doesn't have enough openings left to accommodate all of the candidates selected (and you don't have the privilege Communicate Job Offer Ignoring Number of Openings).

In case of any failure, all of the selected candidates will likely have a partially-created offer but you will have to check the Errors section for each candidate's offer to see which regions' fields were unable to be copied. For example:

The Assignment section may not be filled out for all the new candidates if the original offer's assignment had a location or grade that's currently inactive.

The Other Compensation section may be empty for all the new candidates if they don't satisfy the eligibility profile or element eligibility for the original offer's Individual Compensation Plan.

These incomplete new offers will remain in the status Offer - Draft so that the missing values can be manually provided as needed, even if the option selected when copying the offer was "Submit new offers for approval". When each offer is edited to be complete, you can submit them individually for approval.

As soon as the batch copy offer process is finished, you may receive a notification if this was configured by your administrator. The notification indicates the number of offers that were successfully copied as well as the number of offers that failed, were skipped, or cancelled.

**Appendix 1 Job offer templates are available from the [template library](#)**

Code	Name	When to select
HCMOL01	Standard Open Ended	If Open ended Grades 1-10 (not GH, Annualised or Fractional) - New employees
HCMOL02	Standard Fixed Term	If Fixed-term Grades 1-10 (not GH, Annualised or Fractional) - New employees
HCMOL03	GH Open Ended	If GH Open ended Grades 1-10
HCMOL04	GH Fixed Term	If GH Fixed-term Grades 1-10
HCMOL05	Annualised Open Ended	If Annualised + Open Ended all grades
HCMOL06	Annualised Fixed Term	If Annualised + Fixed term all grades
HCMOL07	Fractional Open Ended	If Fractional+ Open Ended all grades
HCMOL08	Fractional Fixed Term	If Fractional+ Fixed term all grades
HCMOL09	Additional post Open Ended	If Open ended Grades 1-10 - Existing employees taking on a new post and retaining another
HCMOL10	Additional post Fixed Term	If fixed-term Grades 1-10 - Existing employees taking on a new post and retaining another
HCMOL14	Internal Transfer - Fixed Term	If fixed-term Grades 1-10 - Existing employees taking on a new post which will be their only post
HCMOL15	Internal Transfer - Open Ended	If Open ended Grades 1-10 - Existing employees taking on a new post which will be their only post

## Appendix 2 Description for Guaranteed Hours Period Hours Cover/Number of Hours Period Field

Each should be used in the following scenarios:

Option	Description	When to use
Over Period of Current GHC  <b>Use this for contracts less than a year</b>	Minimum hours to be guaranteed for full duration of GH contract e.g. over the 2-year fixed term contract	<ul style="list-style-type: none"> <li>The GH period start and end date and Fixed Term Contract start and projected end date must be the same</li> <li>You do not need to tick the Annually reviewed box in the Job Offer Additional Information screen</li> <li>No GH refresh letter is required unless the fixed term contract is subsequently extended.</li> <li>This option and Over Period of Current FTC are similar. Please check with your HR partner if there is a preferred approach in your School/Department</li> </ul>
Over Period of Current FTC  <b>Not in use</b>	Minimum hours to be guaranteed for full duration of the current fixed term contract.	<ul style="list-style-type: none"> <li>The GH period start and end date and Fixed Term Contract start and projected end date must be the same</li> <li>You do not need to tick the Annually reviewed box in the job offer Additional Information screen</li> <li>No GH refresh letter is required unless the fixed term contract was extended.</li> <li>This option and Over Period of Current GHC are similar. Please check with your HR partner if there is a preferred approach in your School/Department</li> </ul>
Per Year  <b>Use this for contracts a year or longer</b>	The minimum hours to be guaranteed for one GH Period.	<ul style="list-style-type: none"> <li>This option is recommended for individuals getting a contract for a number of years.</li> </ul>

		<ul style="list-style-type: none"> <li>• The GH period is a year from the GH Start date. i.e. if start date is 01/09/2023 the GH end date must be 31/8/2024</li> <li>• The GH employee will only get access to a timecard to claim payment if they have a current GH period</li> <li>• You <b>do need</b> to tick the Annually Reviewed box in the job offer Additional Information screen</li> <li>• You need to send a GH refresh letter at the end of each GH period</li> </ul>
<p>Per Year, Every Year for (use with open ended contracts)</p> <p><b>Not in use</b></p>	<p>The minimum hours to be guaranteed are to be the same minimum hours for each GH Period, indefinitely</p>	<ul style="list-style-type: none"> <li>• This option is usually used for open-ended assignments.</li> <li>• By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum hours each year from the duration of the open-ended contract. This may be an issue if the demand for the work or budget available changes over time.</li> <li>• You do not need to tick the Annually reviewed box in the job offer Additional Information screen</li> <li>• There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee</li> </ul>
<p>Per Year/Every Year-Over Dura/FTC</p> <p><b>Not in use</b></p>	<p>The minimum hours to be guaranteed are to be the same for each GH Period for the full duration of the fixed term employment contract related to that assignment.</p>	<ul style="list-style-type: none"> <li>• Use this if you have a stable requirement for hours.</li> <li>• By selecting this option, from the outset of the contract, you are guaranteeing the employee the same</li> </ul>

		<p>minimum hours each year from the duration of the fixed term contract. This may be an issue if the demand for the work or budget available changes over time.</p> <ul style="list-style-type: none"> <li>• You do not need to tick the Annually reviewed box in the job offer Additional Information screen</li> <li>• There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee.</li> <li>• No refresh letter is required unless the fixed term contract is extended.</li> </ul>
--	--	---