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.

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.

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 Form.

You can track the progress of the approval for an offer once submitted, see the section below on Checking Offer Approval.
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
14. Complete the required fields in the Additional Info 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 **Active Applications**.

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](#).

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**In Detail…**

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

1. Click the ellipsis button next to the candidate with the status **Offer, To Be Created**, and select **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. Used when single assignment holders are moving in part to secondment and retaining time in substantive post OR multiple assignment holder moving from one assignment 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**.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Guidance for completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit*</td>
<td>Select relevant BU</td>
</tr>
<tr>
<td>Projected End Date</td>
<td>For fixed term contracts please provide</td>
</tr>
<tr>
<td>Position*</td>
<td>Populate this field if you have created a job requisition from a template or blank requisition.</td>
</tr>
<tr>
<td>Personal Job Title*</td>
<td>This automatically populates with the position name so it should be overwritten for a meaningful job title. This will also impact on correspondence e.g. contracts.</td>
</tr>
<tr>
<td>Grade Ladder*</td>
<td>Defaults to appropriate</td>
</tr>
<tr>
<td>Grade*</td>
<td>As above</td>
</tr>
<tr>
<td>Step</td>
<td>Grade Step</td>
</tr>
<tr>
<td>Department</td>
<td>Select the relevant department</td>
</tr>
<tr>
<td>Location*</td>
<td>Location where employee will be based</td>
</tr>
<tr>
<td>Building</td>
<td>If applicable</td>
</tr>
<tr>
<td>Working at Home</td>
<td>Yes/No</td>
</tr>
<tr>
<td>Worker Category</td>
<td>Select the relevant worker category e.g Guaranteed Hours</td>
</tr>
<tr>
<td>Assignment Category*</td>
<td>Select the appropriate from the dropdown, e.g open ended, fixed term. Select Secondment when moving in full or part to a secondment post.</td>
</tr>
<tr>
<td>Working Hours</td>
<td>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.</td>
</tr>
<tr>
<td>FTE</td>
<td>Automatically populates based on Working Hours</td>
</tr>
<tr>
<td>Working as a Manager</td>
<td>Yes/No</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Fixed Term Reason Code</td>
<td>Must be provided for fixed term contracts.</td>
</tr>
<tr>
<td>NHS Honorary Contract</td>
<td>If applicable</td>
</tr>
<tr>
<td>Contract review Date</td>
<td>If applicable</td>
</tr>
</tbody>
</table>
| Research/Teaching&Research/Teaching only* | 1 - Academic Contract that is teaching only  
2 - Academic Contract that is research only  
3 - Academic contract that is both teaching and research  
4 - Non academic contract  
9 - Academic Contract that is neither teaching nor 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 information for 2019/2020 click <a href="#">here</a>. |
| Level* | This is now a mandatory field, please use the <a href="#">table below</a> to select the appropriate 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 |
| 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. |</p>
<table>
<thead>
<tr>
<th>STAFF LEVEL CODE</th>
<th>STAFF LEVEL DESCRIPTION PEOPLE AND MONEY</th>
<th>GRADES ASSIGNED TO STAFF LEVEL CODE</th>
<th>ADDITIONAL CRITERIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>A0</td>
<td>Vice-Chancellor/Principal/Head of Initiation</td>
<td>Principal only</td>
<td></td>
</tr>
<tr>
<td>B0</td>
<td>UCEA level 2</td>
<td>Vice-Principal/University Secretary</td>
<td></td>
</tr>
<tr>
<td>C1</td>
<td>UCEA level 3A</td>
<td>Report to run by HR to identify this grouping</td>
<td></td>
</tr>
<tr>
<td>C2</td>
<td>UCEA level 3B</td>
<td>College Registrar</td>
<td></td>
</tr>
<tr>
<td>D1</td>
<td>UCEA level 3/4A1</td>
<td>Report to run by HR to identify this grouping</td>
<td></td>
</tr>
<tr>
<td>D2</td>
<td>UCEA level 3/4A2</td>
<td>Report to run by HR to identify this grouping</td>
<td></td>
</tr>
<tr>
<td>D3</td>
<td>UCEA level 3/4A3</td>
<td>Report to run by HR to identify this grouping</td>
<td></td>
</tr>
<tr>
<td>E1</td>
<td>UCEA level 4A</td>
<td>XM1</td>
<td></td>
</tr>
<tr>
<td>E2</td>
<td>UCEA level 4B</td>
<td>Report to run by HR to identify this grouping</td>
<td></td>
</tr>
<tr>
<td>F1</td>
<td>UCEA level 5A</td>
<td>AC4, AM4, ACN4, AMN4, ACT4, AMT4 UE10 / OTHS Academic</td>
<td></td>
</tr>
<tr>
<td>F2</td>
<td>UCEA level 5B</td>
<td>UE10 / OTHS Non-Academic staff (e.g. Professional services staff)</td>
<td>ARC ON SPINAL POINT 39, 40, 44, 45, 46</td>
</tr>
<tr>
<td>I0</td>
<td>XpertHR level I</td>
<td>UE09, ECA8, AC3A, AC3B, ACN3, ACT3, AM3A, AM3B, AMN3, AMT3, ARW2, XM2A, XM2B</td>
<td>ARC ON SPINAL POINT 39, 40, 44, 45, 46</td>
</tr>
<tr>
<td>J0</td>
<td>XpertHR level J</td>
<td>UE08, ECA7, AC2, AM2, ACN2, AMN2, ARW1, MC3, XM3A, XM3B, RCB3</td>
<td>ARC ON SPINAL POINT 37, 38, 49, 50</td>
</tr>
<tr>
<td>K0</td>
<td>XpertHR level K</td>
<td>UE07, UE7N, ECA6, MC2, AFC7, ECA6, XM4A, XM4B, RCB4</td>
<td>ARC ON SPINAL POINT 29, 30, 36, 41, 42, 47, 48</td>
</tr>
<tr>
<td>L0</td>
<td>XpertHR level L</td>
<td>UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375</td>
<td></td>
</tr>
<tr>
<td>M0</td>
<td>XpertHR level M</td>
<td>UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B</td>
<td></td>
</tr>
<tr>
<td>N0</td>
<td>XpertHR level N</td>
<td>UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A and all staff in subsidiaries</td>
<td></td>
</tr>
<tr>
<td>O0</td>
<td>XpertHR level O</td>
<td>UE02, ECA2, RCB8</td>
<td></td>
</tr>
<tr>
<td>P0</td>
<td>XpertHR level p</td>
<td>UE01, ECA1</td>
<td></td>
</tr>
</tbody>
</table>
Default Expense Account Code

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

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.

<table>
<thead>
<tr>
<th>Code to use</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Entity</td>
<td>110</td>
</tr>
<tr>
<td>Fund</td>
<td>110002</td>
</tr>
<tr>
<td>Cost Centre</td>
<td>From the JRBC Form</td>
</tr>
<tr>
<td>Account</td>
<td>2410</td>
</tr>
<tr>
<td>Analysis</td>
<td>000000</td>
</tr>
<tr>
<td>Portfolio</td>
<td>00000000</td>
</tr>
<tr>
<td>Product</td>
<td>00000000</td>
</tr>
<tr>
<td>Intercompany</td>
<td>000</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Manager</td>
<td></td>
</tr>
<tr>
<td>Offer Specialist</td>
<td></td>
</tr>
</tbody>
</table>

*Add Collaborator Type*

### 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*
  - UoE Group

**Other Info**

- *Tax Reporting Unit*
  - University of Edinburgh

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

![Salary section](image)

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 fand attachments section (step 9 below) below and use the ‘Attachments-
Internal Document’ to supply any supporting documentation/rationale.

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

Select OK and a summary box will display.

Note that further Allowances may be added here by selecting
Select **Continue**. To move to next section

<table>
<thead>
<tr>
<th>Other Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>London Weighting Allowance</td>
</tr>
<tr>
<td>20/06/2020 - 20/06/2022</td>
</tr>
<tr>
<td>£1,000.00 GIP</td>
</tr>
</tbody>
</table>

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**.
- Guarantted Hours (GH) – Add in 0 to Total number of hours for period (GH only). Select appropriate value for Period hours cover (GH only) and Annually Reviewed (GH only).
- Annualised – Enter Number of hours per year and Average weekly working hours. Select appropriate value for Term time only.
- Fractional – 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.
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.
3. The **Job Applications** page opens, and the status of the candidate with the unfinished offer is shown as **Offer, Draft**.

![Job Applications page](image)

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.

   ![My Team and Hiring App](image)

   Or
Click on My Client Groups and select the Hiring App 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
6. The job offers opens in section 1. **When and Why**.

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
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.

The job offer couldn't be extended. There was a problem with the job offer letter. (IRC-1590302)
Job offer templates are available from the template library.

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