

Process an Offer Letter

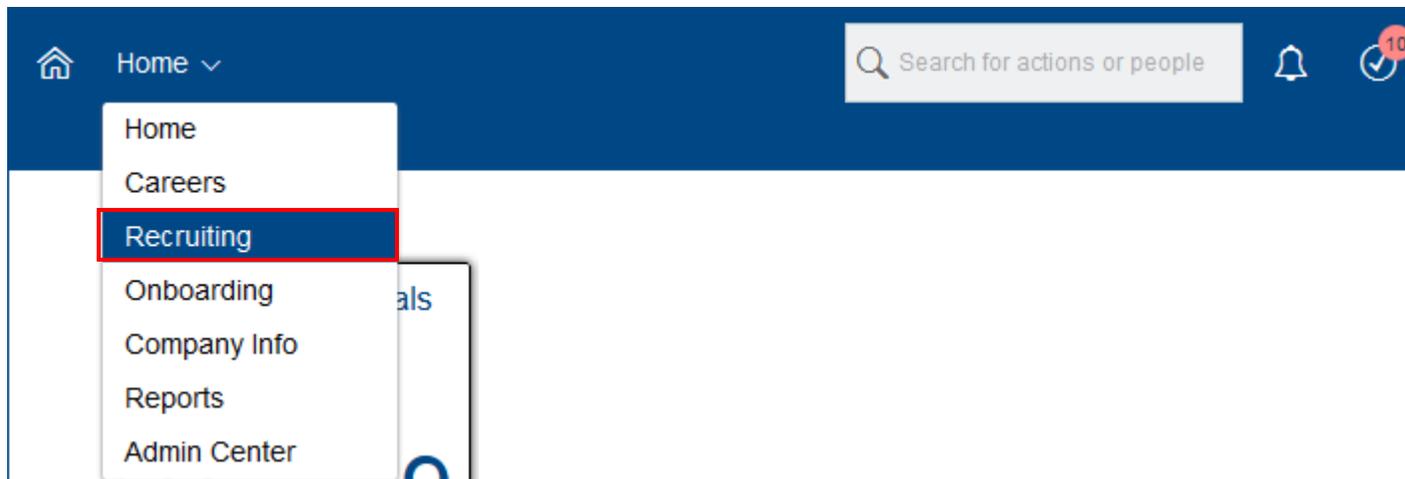
Overview

After an offer approval is completed for a successful candidate, and the offer is approved, HR Shared Services uses SuccessFactors to create an offer letter and sends it electronically to the successful candidate. Offer letter templates in SuccessFactors are used for processing offer letters, helping prevent errors and the duplication of work.

Note: Candidate data entered in SuccessFactors is used in the creation of the Offer Approval and the Offer Letter, and is integrated with SAP and Onboarding.

Procedure

1. Click the **Home** menu and select **Recruiting** from the drop-down.



The *Recruiting* screen appears and displays a list of requisitions.

2. Click the **applicable job requisition** under the **Job Title** column (the requisition ID can be found under the Requisition ID column).

Job Requisitions

[+ Create New](#)
[Offer Approvals](#)
[RMK Dashboard](#)

4 Candidates Forwarded
 7 New Candidates
 32 Current External Requisitions
 31 Current Internal Requisitions
 Average Days Open **8**

Items per page **150**
 << < Page **1** of 2 > >>

Approve
 Filter Job Requisitions: All job requisitions
 Filter Options
 Display Options

Highlight Job Title:

Select	Job Title	Requisition ID ↓	Position Number	Org Chief	HR Shared Services	Org Chief One Up	Finance Approver
<input type="checkbox"/>	TEST-EX-POST	2961		PERSONID_700037 PERSONID_700037	HRSS Req Approval	PERSON_700017 SFI_CE	HRSS Req Approval
<input type="checkbox"/>	TEST-EX-2	2950		PERSONID_700037 PERSONID_700037	HRSS Req Approval	PERSON_700017 SFI_CE	HRSS Req Approval
<input type="checkbox"/>	Administrative Manager	2948		PERSONID_700037 PERSONID_700037	HRSS Req Approval	PERSON_700017 SFI_CE	Pan Am Req Approval

The *Requisition* screen appears and displays the details for the requisition.

3. Click **Candidates**.

WRHA Requisition for Administrative Manager

[JOB REQUISITION DETAIL](#)
 [JOB PROFILE](#)
 [CANDIDATES \(1\)](#)
 [JOB POSTINGS \(0\)](#)
 [CANDIDATE SEARCH](#)

[Internal Posting Preview](#)
[External Posting Preview](#)

Requisition Information

* Requisition ID 2948

The *Talent Pipeline* screen appears.

4. Click the **Offer** segment.

The candidate's name appears below the *Talent Pipeline*.

5. Click the **checkbox** next to the candidate's name under the **Name** heading.
6. Click the **Action** button and select **Move Candidate** from the menu that appears.

The screenshot shows the Talent Pipeline interface. On the left, a dropdown menu is open with 'Move Candidate' selected and highlighted with a red box. A red arrow points to the 'Offer' segment in the pipeline progress bar, which shows a count of 1 with an asterisk. Below the pipeline, a table lists candidates. The first candidate, John Henry, is selected with a checkbox. The 'Action' button is also highlighted with a red arrow.

Forwarded	Applicant Review	Short List	Interviews	Reference Checks	Offer	SAP	Hired	Do Not Proc
0	0	0	0	0	1*	0	0	>

<input checked="" type="checkbox"/>	Name ↑	New Status	Candidate Type	Interview Result	Overdue Interviews	Source	Candidate Source	Phone Number
<input checked="" type="checkbox"/>	John Henry	Offer Approval	External			Corporate: WRHA External Career Portal	Corporate: WRHA External Career Portal	2045559989

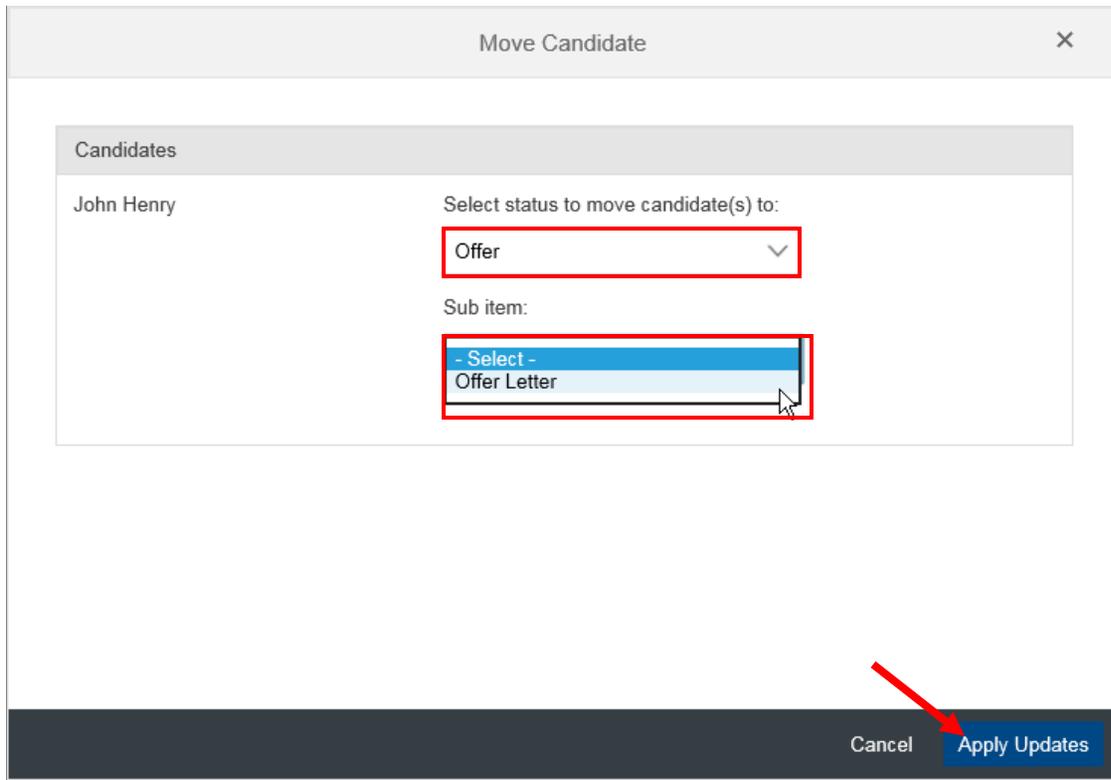
Items per page: 10 | Page 1 of 1

The *Move Candidate* screen opens.

7. Click  in the **Select status to move candidate(s) to** field and select **Offer** from the drop-down.

The *Sub item* menu appears.

8. Click  in the **Sub item** menu and select **Offer Letter** from the drop-down.
9. Click **Apply Updates**.



Note: *Offer* must be selected from the *Select status to move candidate(s) to* drop-down menu in order for the *Sub item* menu to appear.

The *Talent Pipeline* screen appears.

Note: The candidate is now in the Offer Letter folder within the Offer segment of the Talent Pipeline.

10. Click the candidate's name.

Talent Pipeline [View active candidates \(1\)](#) [View all candidates \(1\)](#)

Forwarded 0 Invited To Apply 0 New Applicant Review 0 Short List 0 Interviews 0 Reference Checks 0 Offer 1* SAP 0 Hired 0 Do Not Proc >

Candidates : View Multiple Application Status (1)

0 Selected Action Display Options Filter Options Highlight Candidate

Name ↑	New Status	Candidate Type	Interview Result	Overdue Interviews	Source	Candidate Source	Phone Number	Last
John Henry	Offer Letter	External			Corporate: WRHA External Career Portal	Corporate: WRHA External Career Portal	2045559989	11/29

The *Candidate Overview* appears on the left side of the screen.

11. Click [Take Action](#).

Forwarded 0 Invited To Apply 0 New Applicant Review 0 Short List 0 Interviews 0 Reference Checks 0 Offer 1/1* SAP 0 Hired 0 Do Not Proc >

Candidates : View Offer Letter (1)

0 Selected Action Filter Options

John Henry (External Candidate) Application Resume

2045559989 bm35@yopmail.com Cover Letter Resume View Profile Save Cancel Email **Take Action**

Application Comments + Add

Status: Offer Offer Letter

Additional Documents Attach a document

Date: 11/29/2017 User: System

The *Take Action* menu appears.

12. Place your cursor over **Offer** in the menu, and then click **Offer Letter** in the sub-menu that appears.

The screenshot shows the 'Administrative Manager' interface for a requisition with ID 2948. The 'CANDIDATES' tab is active. A 'Take Action' menu is open, with the 'Offer' option highlighted by a red arrow. A sub-menu is visible, showing 'Offer Letter' as the selected option. The interface includes a top navigation bar with tabs for 'JOB PROFILE', 'CANDIDATES', 'JOB POSTINGS (0)', 'CANDIDATE SEARCH', and 'MARKET JOB'. Below the navigation, there are filters for 'Status' (Open) and 'Org Chief' (PER). A 'Talent Pipeline' section shows various stages: Forwarded (0), Invited To Apply (0), New Applicant Review (0), Short List (0), Interviews (0), Reference Checks (0), and Offer (1/1). The main content area displays the profile for 'John Henry (External Candidate)' with contact information and links for 'Cover Letter', 'Resume', and 'View Profile'. The 'Application' section shows the current status as 'Offer' and a sub-status of 'Offer Letter'. There are also sections for 'Comments' and 'Correspondence'.

The *Offer Letter* screen appears.

13. Click in the **Template** field and select the **applicable offer template** from the drop-down.

The *Subject* field auto-populates based on your selection, and the selected template loads in the letter field at the bottom of the screen.

14. Click **Next Step**.

John Henry
 2045559989
 bm35@yopmail.com

Country: Canada

Language: English

Template: **Unionized - Permanent**

Subject: LOO for unionized permanent staff

Note: Refer to the Personnel Subarea (union) and Employment Group/ Subgroup (permanent/ term/casual), to determine which template to use.

Offer Template selection options include:

- PSA 2415 / 2415
 - HCDSS Casual
 - HCDSS EFT PERM
 - HCDSS EFT TERM
- PSA 2000 / 2001
 - Non-union Casual
 - Non-union EFT PERM
 - Non-union EFT TERM
- Union (excluding PSA 2414 & 2415)
 - Union Casual
 - Union EFT PERM
 - Union EFT TERM

The *Offer Letter template* screen appears.

15. Review the offer letter.

- Add additional supplementary language, if applicable, based on requirements specific to the position (e.g. rotation, work location, standby, underfill, eligibility list). Refer to the [HRSS SharePoint](#) for more information.
- Remove benefits wording if it is not applicable to the position (e.g. benefits enrolment is not required).
- For HCDSS letter templates, copy the rotation calendar from the requisition and paste it directly into the letter (the rotation calendar does not correctly populate in the letter).

Note: Refer to the [HRSS SharePoint](#) for additional details on what must be reviewed in the offer letter.

Offer Letter: John Henry for Administrative Manager

Draft is saved successfully

* Send Offer to:

Subject: LOO for unionized permanent staff



Winnipeg Regional Health Authority
Caring for Health

Office régional de la santé de Winnipeg
À l'écoute de notre santé

HR Shared Services
300 Carlton St., 5th Floor
Winnipeg, Manitoba
R3B 2K6 CANADA
TEL: 204-940-8500

Services partagés en RH
300, rue Carlton, 5^e étage
Winnipeg (Manitoba)
R3B 2K6 CANADA
TÉL: 204-940-8500

12/11/2017

John Henry Private and Confidential

35 Henderson Hwy
Winnipeg, Manitoba R2G 1A5

16. Click **Online Offer** at the bottom of the screen.

Print

Online Offer

Verbal Offer

Email as text

Email as PDF attachment

The *Email link to Online Offer Letter* screen appears.

17. Click  in the **Template** field and select the **[Offer] Pending Offer for Internal Candidate** or **[Offer] Pending Offer for External Candidate** email template based on the candidate type (internal/external).

18. Click **Next**.

Note: A review of SAP should be completed to confirm whether the employee is Internal (has an active SAP assignment), or External (no SAP record, or all assignments withdrawn).

Offer Letter: John Henry for Administrative Manager

Email link to Online Offer Letter

Candidates: John Henry [Johnhenry@yopmail.com]

Language: English 

Brand: Select Marketing Brand 

Template: [Offer] Pending Offer for Internal Candidate 

Email templates provides specific subject and message content, but are editable.

Cc: Org Chief,

Subject: Offer of Employment for the position of Administrative Manager (Req # 2948)

The **Cc:** field autopopuates with the Org Chief when the following templates are selected:

- [Offer] Pending Offer for Internal Candidate
- [Offer] Pending Offer for External Candidate
- [Offer] Pending Offer for External Candidate...complete 2nd step

Dear [[CANDIDATE_FIRST_NAME]],

Congratulations on being the successful candidate in our search to fill the position of [[JOB_REQ_TITLE]] (Req #[[JOB_REQ_ID]]) at [[JOB_REQUISITION_CUSTOM5]]. We are extending you an offer of employment, please respond within three days.

Please ensure all details of your offer are correct. For detailed instructions on how to accept, decline, or to request updates or corrections please [click here](#). To view your offer please click the following link [[CANDIDATE_OFFER_URL]]

After you have accepted your offer, please continue to check your email regularly. We will send you additional messages regarding next steps to complete prior to your start date.

Regards,
Human Resource Shared Services (HRSS)

Paragraphs: 5, Words: 105

 Attach a document

Reset Template
Back Next

A preview of the notification that will be sent to the successful candidate appears.

19. Click **Send**.

The screenshot shows the SAP SuccessFactors interface. The top navigation bar includes a home icon, 'Recruiting' with a dropdown arrow, a search bar with the placeholder 'Search for actions or people', a notification bell, a profile icon with a '5' badge, 'HRSS Req Approval' with a dropdown arrow, and the 'SAP SuccessFactors' logo. Below the navigation bar are tabs for 'Job Requisitions', 'Preferences', 'Candidates', 'Interview Central', and 'Interview Scheduling'. The main content area is titled 'Offer Letter: John Henry for Administrative Manager' and contains the text 'Email link to Online Offer Letter'. The email preview shows the following details: 'From: [redacted]@wrha.mb.ca', 'To: [redacted]@yopmail.com', 'Date: 11/29/2017', and 'Subject: LOO for unionized permanent staff'. The email body text reads: 'Dear Ed, Congratulations on being the successful candidate in our search to fill the position of General Duty Nurse 2 (Req #5394) at Shared Health. We are extending you an offer of employment, please respond within three days. To view your offer, click the following link: [View/Accept Offer ...](#). If you are accepting the offer, ensure all details are correct. For detailed instructions on how to accept, decline, or request updates or corrections, [click here](#). You will be asked to provide your Social Insurance Number, Date of Birth, and Gender. We require this information to complete your hire. After you have accepted your offer, please continue to check your email regularly. We will send you additional messages regarding next steps to complete prior to your start date. Regards, Human Resource Shared Services (HRSS)'. Below the email body, it says 'Documents 0 attached'. At the bottom right, there are two buttons: 'Back' and 'Send'. A red arrow points to the 'Send' button.

A message displays: *Notification of pending offer sent to Candidate REC###.*

20. Click **I'm Done**.



Next Steps

The successful candidate will receive an email notification to advise that an online job offer is waiting for review and acceptance.

After the successful candidate has accepted the job offer, HR Shared Services can [Send Candidate Information to SAP](#).