PAGE UP SYSTEM

INSTRUCTIONS:

CREATING OFFERS FOR APPROVAL

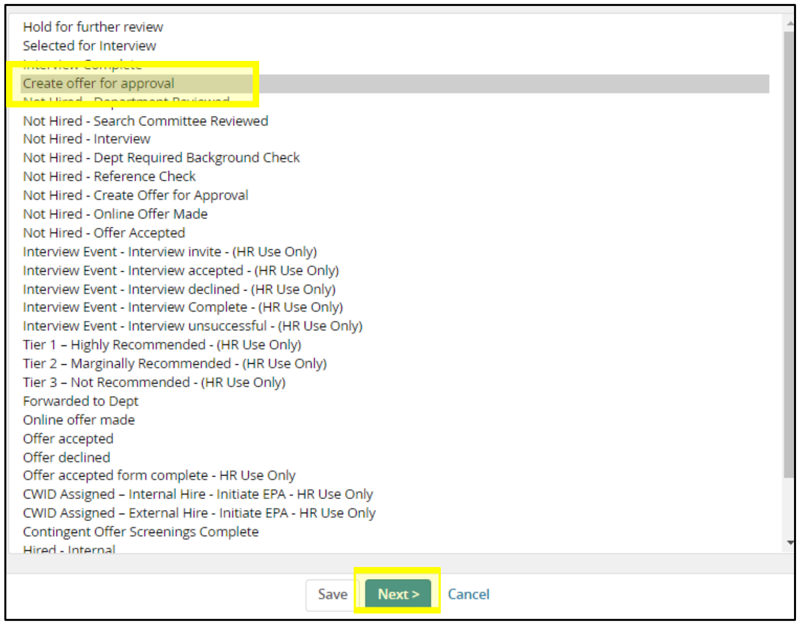
BEST PRACTICES FOR EPA AUTOMATION

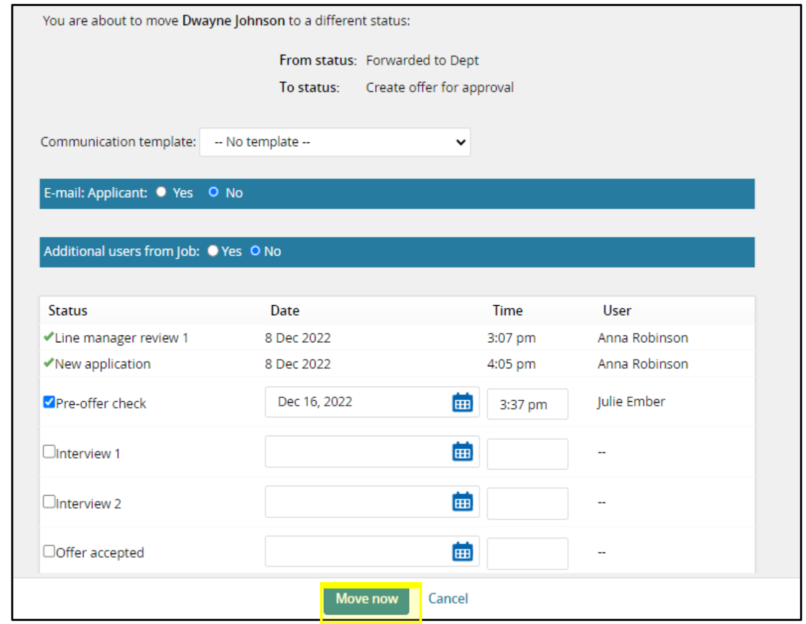
Rev 06.26.23

STEP 1

Change the applicant's status to **Create Offer for Approval**

*Click **Create Offer for Approval** then **Next** then **Move Now***





STEP 2

Complete the fields in the Offer Card

POSITION DETAILS

CWID (if available): 12381019

Please do not include dashes in the CWID

Purpose of Appointment:* Select

Candidate expected start date:*

Until Further Notice:* Select

If you selected no for Until Further Notice, please input an End date of Appointment

End date of Appointment (If less than 12 months):

STEP 2.1

Select Purpose of Appointment

STEP 2.2

Enter expected start date using the Calendar feature

STEP 2.3

Select "Yes" for positions that do not have an end date. Select "No" for positions that will have an end date. Note: Temporary Positions should *always* have an end date.

STEP 2.4

If "No" was selected in Step 2.3, enter the expected end date using the Calendar feature. This date will be used for the ePA. **Temporary positions must have an end date within 12 months of the start date.**

PURPOSE DROP DOWN EXAMPLE

- Select
- Additional assignment
- Demotion
- New hire
- Promotion (not a reclassification)
- Transfer

STEP 2 (CONTINUED)

Complete the fields in the Offer Card

STEP 2.5

Select Paid By:

- Use "Year" for exempt (salaried) employees being offered an annual salary.
- Use "Hour" for non-exempt (hourly) employees being offered an hourly rate.
- Use "Semester" for exempt (salaried) faculty with an appointment for the academic semester, 4.5 months.

STEP 2.6

Enter the pay information and confirm the following:

- Dollar sign "$" is included
- Comma "," is included for annual salaries, if applicable
- Amount includes two decimal places
- If "Year" was selected in Step 2.5, the amount should an annual salary that is divisible by 12. For example, use $65,000.04 instead of $65,000.00 because the monthly rate will need to calculate to exactly $5,416.67 for the ePA.
- If "Hour" was selected in Step 2.5, the amount should be the hourly rate of pay.
- If "Semester" was selected in Step 2.5, the amount should be the semester salary that is divisible by 4.5. Start and end dates used should also match semester dates.

STEP 2.7

If the position is funded by Contracts and/or Grants, select "Yes" from the drop down. This will ensure the offer card and ePA routings include the necessary financial approvers.

If the position is not funded by Contracts and/or Grants, select "No".

STEP 2.8

Enter the FTE for the position. This number should be 1.0 or less.

STEP 2 (CONTINUED)

Complete the fields in the Offer Card

STEP 2.9

If the position will receive relocation assistance, select "Yes". If they will not, or it is unknown at the time of the offer, select "No"

STEP 2.10

If "Yes" was selected in Step 2.9, enter the amount. Note, in this field you will NOT use a dollar sign "$"

STEP 2.11

If "Yes" was selected in Step 2.9, enter the type of relocation assistance (ex: moving expense, house hunting trip, temporary living expenses

STEP 2.12

If the candidate is a current UA employee, select "Yes". If they are not, select "No"

STEP 2.13

If "Yes" was selected in Step 2.12, enter the employee's current paygrade, title and pay . Contact your Talent Acquisition Specialist for this information and guidance on the six-month introductory period review if candidate is a current UA employee.

Will there be a relocation allowance for this position?:* ○ Yes ◉ No

If yes, what is the amount?:

Please see the Relocation Allowances webpage

What type of relocation allowance will be offered?:

Example: moving expenses, house hunting trips, temporary living expenses

Is this a current UA staff employee:* ○ Yes ◉ No

Current Paygrade/UA Staff position title:

Only list title if this individual is currently in a staff position. Do not include faculty, undergraduate students, or graduate students.

Current Rate or Salary (If current UA employee):

Six-Month Introductory Period Review:* ○ Yes ◉ No

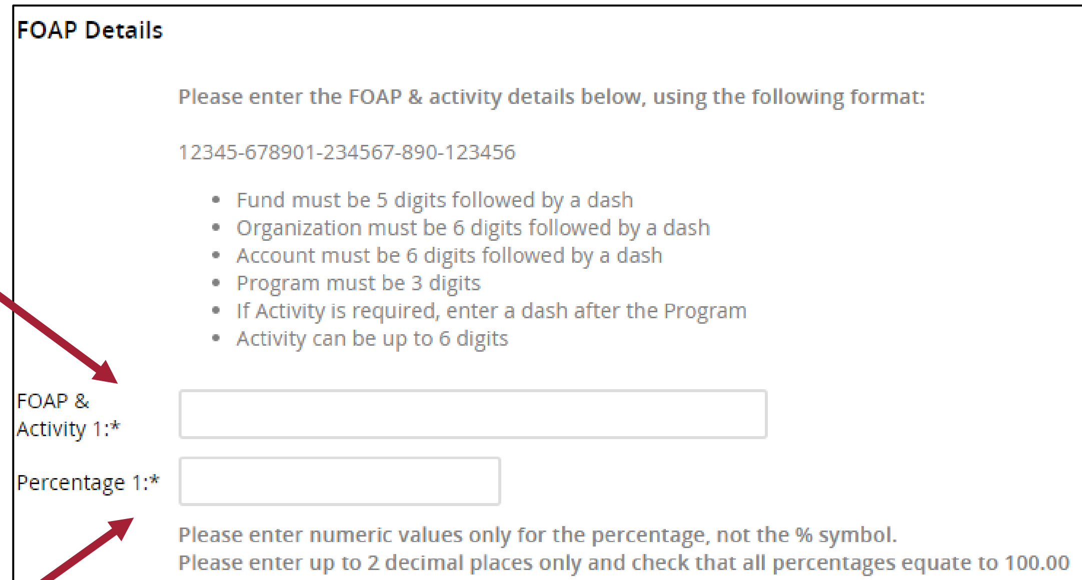
STEP 2 (CONTINUED)

Complete the fields in the Offer Card

STEP 2.14

Enter the FOAP information for Activity 1, by using the instructions. Confirm the following:

- Chart of account has NOT been added at the beginning of the field, for example "A-" ***This will create errors!***
- Character 1-5 in the field is the 5-digit Fund number
- A dash "-" is used for the 6th character after the Fund
- Characters 7-12 in the field is the 6-digit Org Code
- A dash "-" is used for the 13th character after the Org Code
- Characters 14-19 in the field is the 6-digit Account Number
- A dash "-" is used for the 20th character after the Account
- Characters 21-23 in the field is the 3-digit Program Code
- A dash "-" is used for the 24th character after the Program
- Characters 25-30 in the field is the 6-digit Activity Code (If department uses Activity Code. If not, leave blank)



FOAP Details

Please enter the FOAP & activity details below, using the following format:

12345-678901-234567-890-123456

- Fund must be 5 digits followed by a dash
- Organization must be 6 digits followed by a dash
- Account must be 6 digits followed by a dash
- Program must be 3 digits
- If Activity is required, enter a dash after the Program
- Activity can be up to 6 digits

FOAP & Activity 1:*

Percentage 1:*

Please enter numeric values only for the percentage, not the % symbol.
Please enter up to 2 decimal places only and check that all percentages equate to 100.00

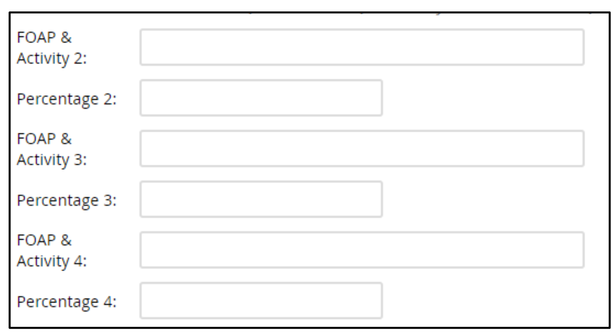
STEP 2.15

Enter the Percentage of the position that will be funded by the FOAP for Activity 1. Do not use a percent sign (%) in this field.

STEP 2.16

The offer card allows for up to 4 different FOAPs to be added. Use the same instructions to enter additional FOAP information if applicable. Confirm the Percentage for all FOAPs used equal 100%.

If position is only funded by 1 FOAP, leave others blank.



FOAP & Activity 2:

Percentage 2:

FOAP & Activity 3:

Percentage 3:

FOAP & Activity 4:

Percentage 4:

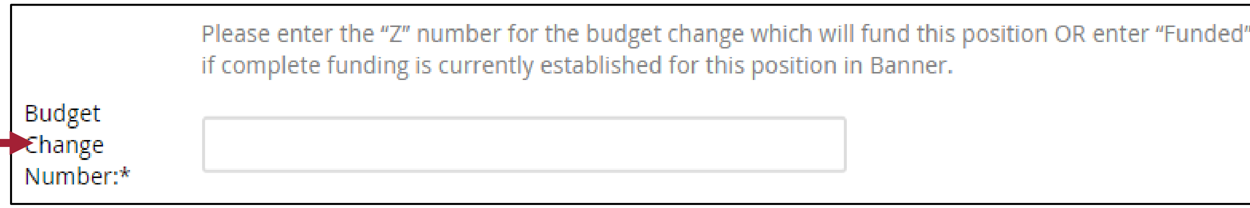
STEP 2 (CONTINUED)

Complete the fields in the Offer Card

STEP 2.17

If the position did NOT require a budget change to fund the amount needed, the field should say “Funded”

If the position required a budget change to fund the amount needed, the field should include the Budget Change “Z” number.



Why is the Z Number needed for the Offer Card?

This number is required for the budgetary approval process. With this process now occurring prior to the offer being extended, funds should be identified and moved, if applicable, prior to the offer card being approved and the offer letter being extended.

The information in this field will be used for the ‘Budget Change Form Numbers’ field of automated ePAs. This field is typically completed by the departmental financial approver on the ePA as it routes through departmental approvals. Automated ePAs will not route through departmental approvers, so it is important to correctly capture this budget information at the offer card stage.

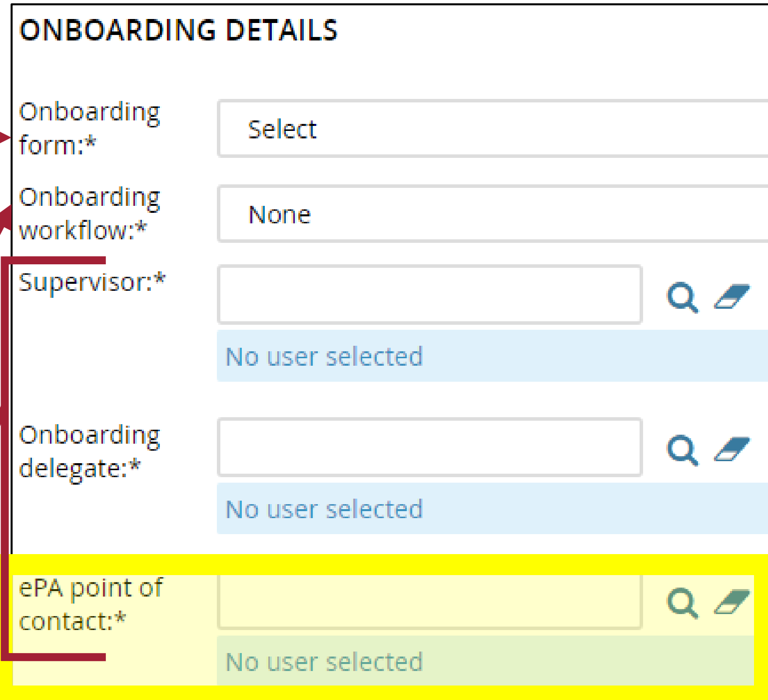
Where do I get the Z Number?

Departments may choose to require the individual entering the information in the Offer Card, typically the ePA Point of Contact, to discuss the funding for the position with the departmental financial approver prior to entering the information. This allows the ePA Point of Contact to know if they need to enter “Funded” or a specific Z Number at the time the offer card is submitted.

Other departments prefer for the departmental financial approver to enter the information in the offer card as the are approving the offer, similar to how they would previously enter on the ePA. Since this is a required field on the offer card, the ePA Point of Contact will need to enter something in this field in order to submit the card for approval. For departments wanting the field updated during the approval process, it is considered a best practice to put the departmental financial approver’s name in the field when the ePA Point of Contact is submitting as an indicator to update the field to “Funded” or a specific Z Number before approving.

STEP 3

Complete the Onboarding Details section



STEP 3.1

Select Standard Onboarding Form

STEP 3.2

Select the Onboarding Workflow based on the current status of the applicant being hired and the type of position the applicant is being hired into. Contact your Talent Acquisition Specialist for guidance if needed.

STEP 3.3

Enter the name or use the search feature to designate the following roles:

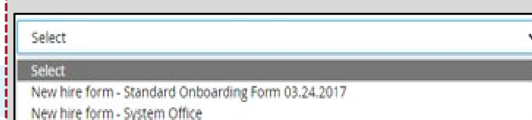
- **Supervisor** – The individual who will directly supervise this position. They will receive relevant system emails from PageUp.
- **Onboarding delegate** – The individual who will be assisting with onboarding processes for the new hire. They will receive relevant system emails from PageUp.
- **ePA Point of Contact** – The individual who submits ePA for new hire. They will receive relevant K2 / ePA related system emails and the complete ePA.

IMPORTANT!!!

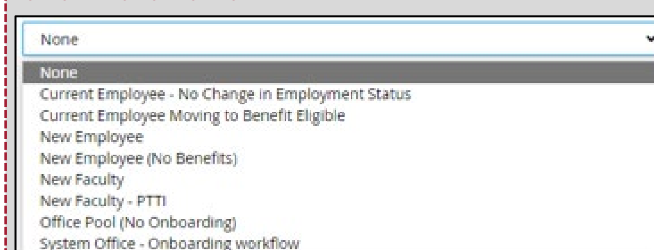
ePA Point of Contact

receives all ePA related email communications from the system

ONBOARDING FORM DOWN EXAMPLE



ONBOARDING WOKFLOW DOWN EXAMPLE



STEP 4

Select an Approval Process and Submit

STEP 4.1

Enter the Offer Created By field. The name in this field will receive the offer letter draft for approval from the Recruiter / HRBP before it is sent to the candidate.

STEP 4.2

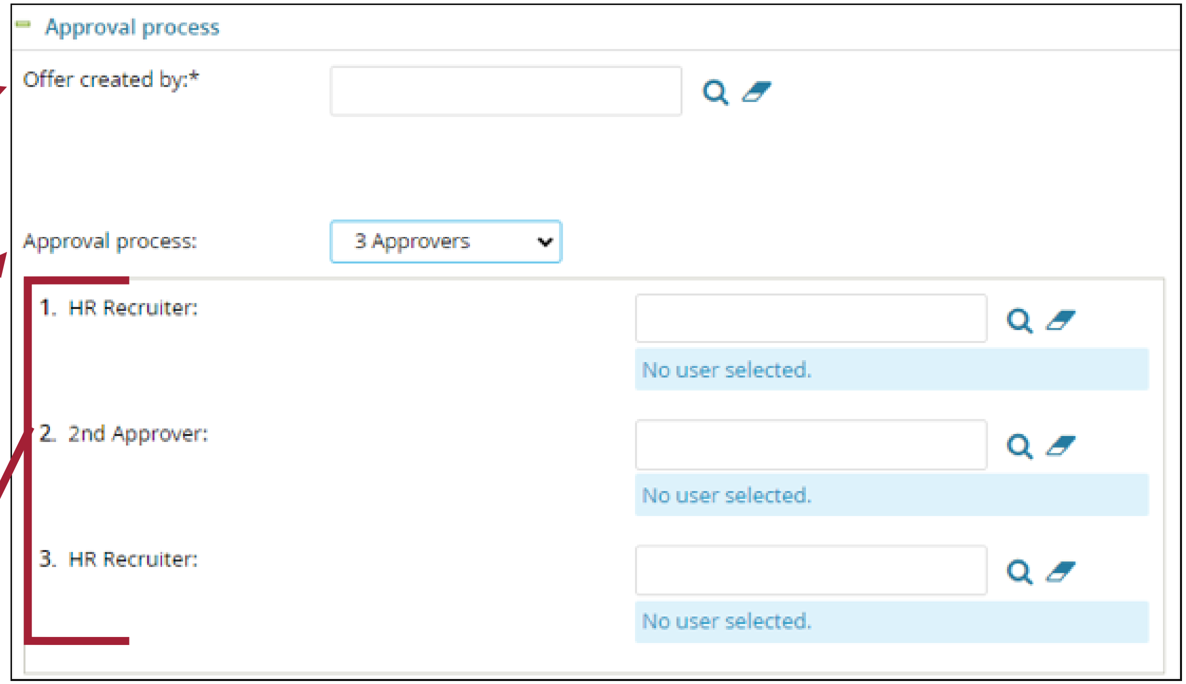
Select the number of approvers required by your department's process.

3 Approvers is the minimum as the offer card must go to the HR Recruiter / HRBP, departmental financial approver and back to the HR Recruiter / HRBP.

STEP 4.3

Enter the names for each approver or use the search function.

- **First Approver** – The HR Recruiter or HRBP assigned to the department should be listed as the 1st approver (HR Recruiter)
- **Middle Approver(s)** – Departmental Approver(s) should be listed next in the routing. Financial Approver MUST BE included. Departments can decide how many approvers to include based on internal business practices.
- **Last Approver** – The HR Recruiter or HRBP assigned to the department should be listed again as the final approver (HR Recruiter)



STEP 4.4

Once you have completed all mandatory fields, include the approval process, press **Save and submit.**