Creating a Hiring Proposal

Purpose: Use this quick reference guide to walk through creating and complete a hiring proposal in PeopleAdmin 7. A hiring proposal needs to be initiated after a candidate has been recommended for hire.

Step 1: Update the Active Applicant Pool & Send for Background Check (if applicable)

Login to the Applicant Tracking Module. Before changing the status of a candidate to **Recommend for Hire**, all applicants that are not selected for hire will need an updated status. To do this, complete the following steps:

1. Load the posting from your watchlist (if flagged) or from the postings tab
2. From the summary page, click the **Applicant** tab
3. To move applicants in bulk, click the box beside the applicants name to select the applicants and then hover over the **actions** button. Select the option **move in workflow**.
4. Update the applicant's status appropriately (e.g. **Approved for Interview, Not Hired**).
5. Enter the **Reason Code.**
6. Click **Save changes.**
7. Repeat for all applicants that are not selected for hire. For more information on applicant statuses, see the **Rating Applicants User Manual**.
8. If the position requires a background check, change the selected applicant's status to **Send for Background Check**. This will initiate the background check screening process based on the position prescreening requirements as outlined in the posting.
9. Once the background check has cleared the applicants status will change to **Background Check Complete** indicating the applicant has cleared the prescreening. If the applicant did not clear you will be notified by HR and the applicant's status will be changed to **Approved for Interview, Not Hired**.
10. If no background check is required, change the selected candidate to **Recommend for Hire, No Background Check**.

Step 2: Start Hiring Proposal

Once the selected candidate has the status of recommend for hire the option to start the hiring proposal will be available.

1. Click on the link to **start hiring proposal**
2. The position descriptions will load and the position will be automatically selected. Scroll to the bottom of the page and click **Select Position Description**

> Take Action On Job Application ▾
> ⭐ View Posting Applied To
> ⭐ Preview Application
> ➕ Start Hiring Proposal
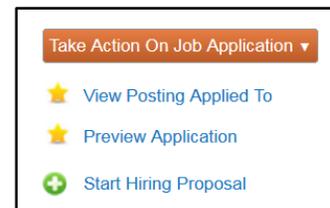
Note: If hiring multiple candidates from one posting, select the appropriate position description from the list of approved position descriptions by click on the radio button beside the title.

Step 3: Complete Required Fields

Fill in the required fields of the Hiring Proposal.

1. Fill in the **Hiring Information** section for:
   a. Proposed Salary
   b. Start Date
2. Click **Save** and **Next.**

> Hiring Information
>
> Hiring Proposal Number
> * Proposed Salary _____ This field is required.
> Approved Salary _____
> Start Date _____
> Orientation Date _____
>
> Save   Next >>

*Note: PA7 will auto generate the draft offer letter based on the posting and hiring proposal details! See **Generating an Offer Letter in PA7** for the step by step instructions!*

Step 4: Upload Hiring Proposal Documents

1. Upload the required documents by hovering over **Actions** and choosing either U**pload New, Create New,** or **Choose Existing.**
   a. Draft Offer Letter

> Actions ▾
> Upload New
> Create New
> Choose Existing
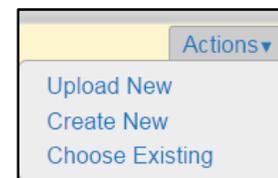
Note: Upload Optional documents if applicable. This will include the Summary of Interviews, any Additional Documents, and/or a Justification for Waiver.

2. Click **Save** and **Next.**

Document Type	Name	Status	(Actions)
Draft Offer Letter			Actions ▾
Summary of Interviews			Actions ▾
Final Offer Letter			Actions ▾
Additional Document(s)			Actions ▾
Justification for Waiver			Actions ▾

Step 5: Review the Hiring Proposal Summary

1. Review the Summary of each section. Ensure that the draft offer letter is attached.

*Note: If you see an orange check mark next to the title of a section, there is information missing. Click **Edit** to return to the proposal to make any changes necessary.*
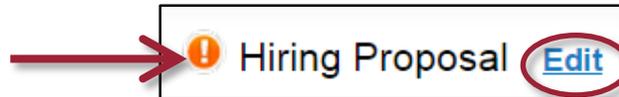
Step 6: Take Action on the Proposal

The Hiring Proposal will be routed through the workflow for approval. Hover over **Take Action on Hiring Proposal** and select the appropriate workflow. Use the table below to better understand the available statuses.
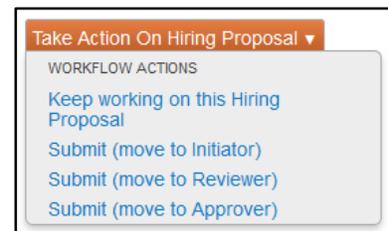
| Workflow Status	Description
Keep working on this hiring proposal	Use this option to save your work, add comments and/or add the hiring proposal to your watchlist.
Submit	The hiring proposal can be started by either the applicant reviewer, initiator, reviewer or approver based on the departments approval chain. Only the approver can submit the proposal to HR.
Return	If needed, users will have the option to return the item to a previous user for corrections/edits.
Submit to HR	Send to HR for review. Once HR completes their review the proposal will be forwarded to OEOC for review. If the review is approved the applicant's status will change to Approved to Make Offer and an email will be sent to the applicant reviewers.

Step 7: Updating Offer Status

If the hiring proposal was approved, return to the hiring proposal through either the posting or through your watchlist (if flagged). Follow the below steps to update the status and attach the final signed offer letter.

1. **Offer Declined** – If the offer was declined click on **Take Action on Hiring Proposal** and select Offer Declined. *Note: This will close out the hiring proposal.*

2. **Offer Accepted** – If the offer was accepted from the summary page click on the **Edit** button to get back into the details of the proposal.
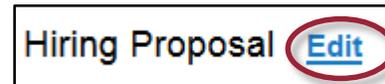
3. Confirm the start date is still accurate (update if needed based on the signed offer letter). If known, complete the orientation date. Click **Next**.
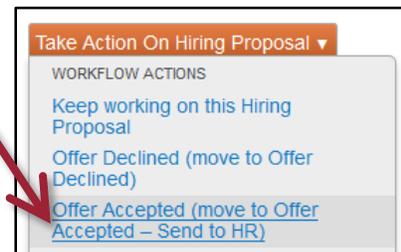
4. Upload the final signed offer letter. Click Next to go back to the summary page.

5. Hover over Take Action on Hiring Proposal and select Offer Accepted. *Note: HR will finalize the hiring proposal seating the employee into the position within PeopleAdmin 7. Class/Comp will compare the hiring proposal against the PACT transaction within BASIS to ensure accuracy.*

*Note: After moving the proposal, you should see a green bar appear at the top of the page. A **green bar** means the **Hiring Proposal** has successfully been routed for review. If you see a **red bar** the action you were trying to take was unsuccessful; go back and review the noted sections.*