

UC San Diego

ONBOARDING Solution Quick Reference

Edit and Distribute an Offer Letter

Let us suppose you need to distribute an Offer Letter to a candidate who wants to accept the offer, but cannot start on the date proposed in the Offer Letter. They are requesting a change to the start date in the Offer Letter.

****The following process should be followed only if the New Hire has NOT accepted the Offer. ****

If the new hire has not accepted the offer, and has asked for changes to the letter, you must instruct them to decline the Offer. Once it has been declined, you can access that record, clone it and edit it for distribution to the new hire.

Log on to the ONBOARDING Environment. <https://crm.ucsd.edu/hr>

Navigate to the Actions Tab. Choose “View Existing Onboardings” from the menu of selections.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All						
Onboarding Name	Hiring Supervisor Name	Department	HR Rep Name	Working Title	Title Code/Payroll Title	Created Date Process Stage
.O, Tosh	Kelly Aranaz	Kelly Aranaz			0747 - ACCOUNTANT PRN	3/30/2016 Completed
AAAAAAA, Test	afdf fadsf	Kelly Aranaz			0034 - SR VC RESTRICTED USE	6/13/2016 Record Created
Aaroon, Daeny	Jack Lance	Kelly Aranaz		Bus Analyst	0655 - BUS SYS ANL MGR 2	6/20/2016 Completed
Adams, Albert	Michael Yates	Michael Yates		Recruiter	7640 - EMPLOYMENT OFCR SR	2/25/2016 Offer Declined
Anderson, Abigail	Kelly Aranaz	Henry Deas		Manager	0010 - PROVOST EXEC VP ACAD AFFAIRS	6/13/2016 Campus Forms Sent
Appleseed, Johnny	Kelly Aranaz	Henry Deas			0100 - MGT PRG UNTTL	6/10/2016 Campus Forms Sent
Aranaz, Julie	Pearl Trinidad	Kelly Aranaz		Mr. Entertainment	6312 - PUBL EVENTS MGR SR	6/14/2016 Campus Forms Sent

Using the alphabet search bar at the top, find the candidate record you need to distribute.

Onboarding Name ↑	Hiring Supervisor Name	Department HR Rep Name	Working Title
fads, fdsf	fdasf fadsf	Martin Test	fadsf
Fell, Felli	Pearl Trinidad	Kelly Aranaz	Project Manager
Flower, Daisy	Pearl Trinidad	Barbara Angeletti	
Franz, Hanz	Kelly Aranaz	Kelly Aranaz	
Friday, Redo	K K	Kelly Aranaz	
Friday, T	K K	Kelly Aranaz	
Friday, Test	K K	Kelly Aranaz	
Frisco, Don	Pearl Trinidad	Barbara Angeletti	Technician

Select the record you want to open

OCSD Onboarding Center / view Onboarding Record

View Onboarding

Process Stage Offer Declined

Employee First Name Daisy

Employee Middle Name

Employee Last Name Flower

Employee ID

You will see that you have the option to “Clone” this record. Most of the data entered will hold from the previous transmission; you will need to enter only unique fields of data. You can change any of the data fields. For purposes of this exercise, you will change the start date. Click Clone.

Department	BUSINESS AND FINANCIAL SERV. (000001)
Title Code/Payroll Title	0540 - BUS SYS ANL SUPV 2
Working Title	
Exemption Status	Exempt
Union Representation	No
Pay Cycle	Monthly
Pay Rate	Use hourly rate for Bweekly pay cycle, monthly rate for Monthly
Appointment Percentage	100.00
Benefits Eligibility	Full Benefits
Department HR Rep Name	Barbara Angeletti
HR Rep Working Title	HR Manager
HR Contact Phone Number	858-534-4929
Offer Letter Acceptance Deadline	8/5/2016 [7/26/2016]
Signing Ceremony Location	Main Campus
Signing Ceremony Address/Building	Institute of Americas
Signing Ceremony Room Number	230

Please note that certain fields are already populated from the previous data entry. Others must be entered. You can change the start date, enter a new salary, or change information in any of the fields. When pasting text into the Additional Details section of the Offer Letter please remove all formatting prior to pasting. An easy way to do this is by pasting your text into Notepad first to remove any formatting and then pasting the additional details text into the Additional Details section. This will ensure the format of the text (font, size, style) will be consistent on the Offer Letter.

Red fields are required fields. Once you have made the necessary changes to the data field(s), click the Save Button. This screen opens:

View Onboarding		Preview/Send Offer Letter	Edit Onboarding	Clone	Refresh	Return To List
Process Stage	Record Created					
Employee First Name	Daisy					
Employee Middle Name						
Employee Last Name	Flower					
Employee ID						
AD User Name						
UCSD Email Address						
Personal Email Address	barbaraangeletti@gmail.com					
Address 1	1 Eucalyptus Drive					
Address 2						
City	San Diego					
State	CA					
Zip Code	92031					
Hirina	Pearl					

Select Preview/Send Offer Letter. Please note that the Preview function is a mandatory step in the process. Once you click the Preview/Send Offer Letter button, the Offer Letter Preview appears.



Clicking the Send Offer Letter button sends the Offer Letter.

****ADDITIONAL BENEFITS OF CLONE FUNCTIONALITY****

The cloning feature allows you to hire multiple individuals in similar job types, e.g. you need to hire 5 cashiers, all in similar positions. Using the Clone button significantly reduces the data entry required for each applicant. Please note that Clone functionality is recommended for 10 records or less.