

SuccessFactors: Recruiting/Onboarding Quick Reference Guide

OFFER LETTER

Last Revised: 06/24/2019

Duke | HUMAN RESOURCES

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Overview

Welcome to SuccessFactors! This Quick Reference Guide (QRG) was created to provide detailed information on how to create the Offer Letter after receiving an Offer Approval. In this guide, we will discuss:

- Creating the Offer Letter and sending the candidate.
- Viewing the Offer from the Job Application

PREDECESSOR STEPS

To create an **Offer Letter**, you will need an **Approved Offer Approval**. See the QRG Offer Process – Offer Approval for further details.

For additional details on working with SuccessFactors, online training videos are available and can be found on the Manager’s Section of the HR Website under Recruitment and Hiring via the following link:

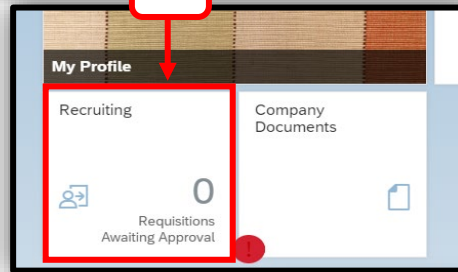
<https://hr.duke.edu/managers/recruitment/successfactors>.

LOG IN

1. The tool is accessible via the [Duke@Work](#) portal. Click the **Candidate Selection** tab.

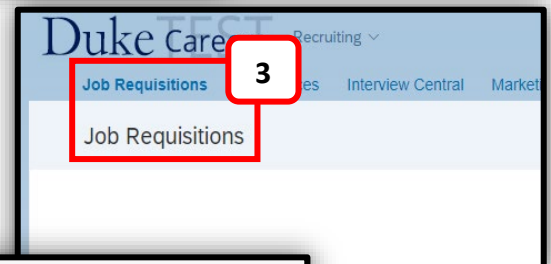


2. On the **Home** screen, locate and click on **Recruiting**.



JOB REQUISITIONS

3. The default page, **Job Requisitions** will display.
 - a. Click on the numbered hyperlinked under the **Candidates** column to open the Candidates View.



Job Title	Requisition ID	Hiring Manager ↑	Candidates
DEPARTMENTAL BUSINESS MGR III	349	ABAINA FARRELL	3
ADMINISTRATIVE SECRETARY 1 1	3710	CAROLINE NISBET	2
AMBULATORYCARE NURSE III 1	3744	CAROLINE NISBET	-



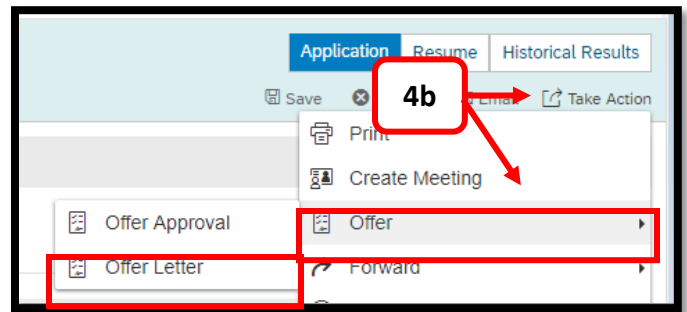
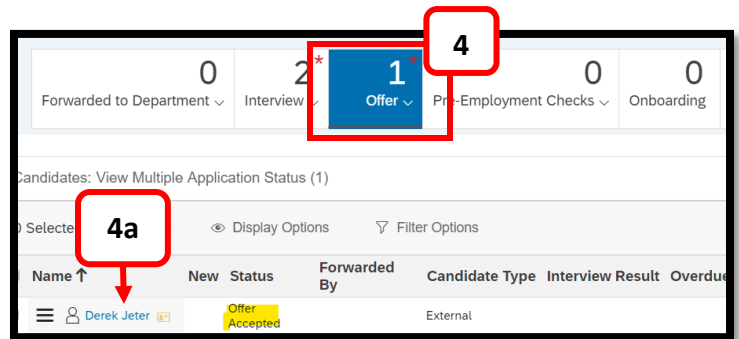
CREATING THE OFFER LETTER

CANDIDATES VIEW

4. The candidate needs to be in the **Offer Talent Pipeline Step** and in either **Offer Extended** or **Offer Accepted** status.

To create the offer letter:

- a. Click on the **Candidate's Name**.
- b. Click **Take Action**, then **Offer**, then **Offer Letter**.



CREATING AND PROOFING THE OFFER LETTER

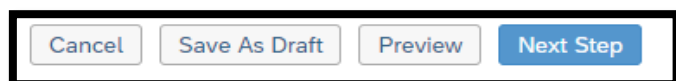
This will open the **Offer Letter** and allow you to choose a Template. The **Offer Letter Templates** are entity and type of position specific. Please contact your HR Representative to verify which templates to use.

The information from the **Offer Approval** is merged into the template. The highlighted fields with brackets -- **[[CANDIDATE_PROFILE_NAME]]** are TOKENS and are populated from the Offer Approval, Job Requisition and Job Application. These fields **must** exist in the **Offer Approval, Job Requisition** or **Job Application** to merge in the letter.

A few tips on using templates.

- Change the Subject Line to the appropriate text.
- You can remove or change the text without changing the template.
- You can change the formatting using formatting bar.
- If you need to start over, use the **Reset Template** button.
- You can paste a complete letter from another source and edit as appropriate.
- If a TOKEN has no value, the Offer Letter will display the TOKEN – **[[CANDIDATE_PROFILE_NAME]]** in the letter. Remove the TOKEN if it is unnecessary.

Use the **Preview Button** or **Next Button** to view the Offer Letter and verify all fields are merged and the wording is appropriate.

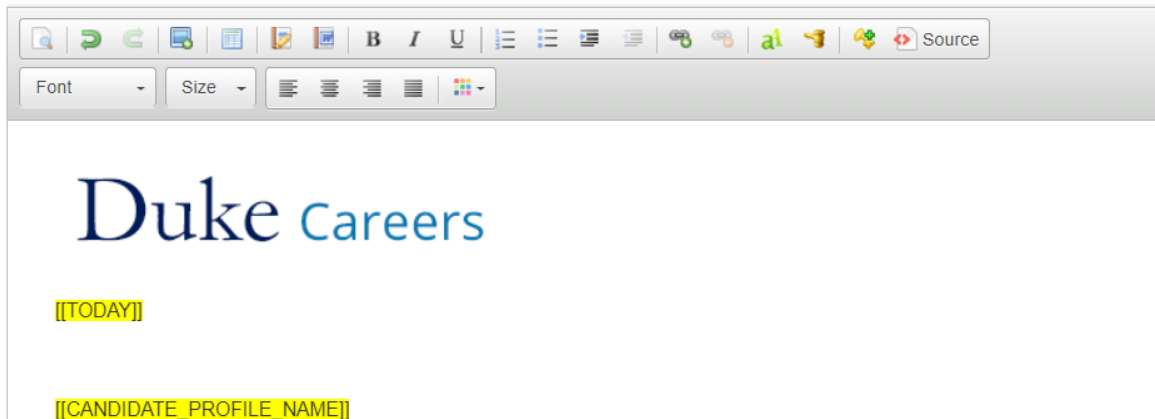


Derek Jeter

999-222-2222

testperson418@gmail.com

Country	United States
Language:	English US (English US)
Template:	DUH External Offer Letter - N
Subject:	Offer Letter - DUH External



SENDING THE OFFER

Selecting Preview or Next displays the Offer with the fields merged and allows you to proof the letter before sending to the candidate. Once you are satisfied with the text you need to choose the method of sending the Offer.

- Online Offer:** Send the Offer to the candidate portal where they can respond online.
- Verbal Offer:** Verbal offers are not relevant to our processes at this point, as this would have occurred before the offer approval.
- Email as Text:** Sending the offer as plain text file is not recommended
- Email as PDF:** Sending the offer as a PDF attachment.

Choose either **EMAIL AS PDF ATTACHMENT** or **ONLINE OFFER**. If you select **ONLINE OFFER** the candidate will have the option to select and sign the letter through the candidate portal. This is the recommended practice.

Selecting either recommended option prompts you for an Email template to use when sending the Offer Letter. Remember, you have an Email that refers to an Offer Letter whether it is an Online Offer or a PDF Attachment.

Offer Letter: Derek Jeter for ADMINISTRATIVE SECRETARY 1 1 ^

Email link to Online Offer Letter

Candidates: Derek Jeter[testperson418@gmail.com]

Language: English US (English US) ▾

Posting Category: Select Marketing Brand ▾

Template: Candidate - Employee Referral Program Candidate added to General pool notification ▾

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

Cc:

Bcc: [cassy.slaven@duke.edu],

Subject: Sample Duke Offer Letter Invite

Font Size [B] [I] [U] [List] [Link] [Image] [Source]

Font ▾ Size ▾ [List] [List] [List] [List] [List] ▾

Duke Careers

Dear: [[CANDIDATE_FIRST_NAME]] [[CANDIDATE_LAST_NAME]]

You were referred by: [[RECRUITING_ERP_REFERREE_NAME]]

Your username is: [[RECRUITING_CANDIDATE_USERNAME]]

[[RECRUITING_ERP_GENERAL_POOL_URL]]

Regards,
[[SIGNATURE]]

Message:

[Attach a document](#) Reset Template

[Back](#) [Next](#)

The same rules apply for using the Email templates:

- Change the Subject Line to appropriate text.
- You can remove or change the text without changing the template.
- You can change the formatting using formatting bar.
- If you need to start over, use the **Reset Template** button.
- You can paste a complete letter from another source and edit as appropriate.
- If a TOKEN has no values, the Offer Letter will display the TOKEN ([[CANDIDATE_PROFILE_NAME]]) in the letter. Remove the TOKEN if it is unnecessary.

Selecting **Next** will allow you to preview the Email before Sending. Use the **Back** button to go back and change the Email template or edit the text.

When you are ready send the Offer select the **Send**. The Offer Letter is displayed. Use the **I'm Done** option which returns you to the Talent Pipeline.

SUCCESSFACTORS: OFFER LETTER

Email sent.
Online offer successfully created and email notification sent.

* Send Offer to:

Subject: Sample Duke Offer Letter Invite

Duke Careers

June 23, 2019

Derek Jeter
234 Main Street NY
New York, 947 99923

Dear Derek,

We are pleased to extend to you an offer of employment and to welcome you to Duke Medicine! This employment offer is contingent upon the successful completion of the following prior to your start date: pre-employment criminal background check, sanctions screening, drug and health screening and reference checks. **The health/drug screening and court record check must be cleared prior to your start date.** The first 90 days of your employment is considered an orientation and evaluation period. During this time your supervisor will communicate performance expectations and evaluate your progress toward meeting those objectives.

DUHS guidelines for annual merit increases: Employees hired between January 1 and March 31 will receive half (50%) of the awarded merit increase for the same calendar year. Employees hired after March 31 are not eligible for a merit increase until the following year.

While this letter does not constitute an employment contract, it covers key employment provisions and is intended to give you a clear understanding of your compensation, and initial employment details.

Information regarding this employment offer is as follows:

TITLE: ADMINISTRATIVE SECRETARY 1 1

DUKE UNIVERSITY HEALTH SYSTEM ORIENTATION: TUESDAY, 9/5/17 at 7:45AM
REPORT TO: Duke University Hospital, Searle Center (Directions enclosed)
If the event of inclement weather, please call (919)684-4293 or check wral.com to verify orientation classes are cancelled.

DUKE REGIONAL HOSPITAL ORIENTATION: TUESDAY, 9/5/17 12:30PM - 4:30PM
Human Resources

NURSING ORIENTATION: WED, 9/6/17-9/12/17 7:00AM *Hock Plaza*

For questions regarding your offer letter please contact your Recruiter. We look forward to having you on our staff and hope you will enjoy your work with us. We will be providing you with additional details regarding benefits and personnel policies during orientation.

Welcome to Duke Regional Hospital!

Wendi S. Austin, RN, BSN, CHCR, Assistant Director
Human Resources, Duke Regional Hospital

0 documents attached

[I'm Done](#) [Print](#) [Online Offer](#) [Verbal Offer](#) [Email as text](#) [Email as PDF attachment](#)

To view the Offer information from the Job application, select the name and open the job application.

0	2*	1*	0	0	0	0	2
Forwarded to Department	Interview	Offer	Pre-Employment Checks	Onboarding	Hired	Disqualification	Hired On Other Requisition

Candidates: View Multiple Application Status (1)

Selected **Action** Display Options Filter Options Highlight Candidate

Name	New	Status	Forwarded By	Candidate Type	Interview Result	Overdue Interviews	Rating	Source	Candidate Source	Phone Number
Derek Jeter		Offer Accepted		External			N/A	Job Board: RCM Redirect	Job Board: RCM Redirect	999-222-2222

On the right hand side of the job application, there is portlet that displays the Offer letter. Clicking on the highlighted text below will display the offer letter.

SUCCESSFACTORS: OFFER LETTER

▼ Offer Letter

[Sample Duke Offer Letter Invite](#)

Author:

Send Mode:

Offer Extended On:

Offer Response:

Online Offer

06/23/2019

Pending (Not Viewed)

Cancel Offer

If you have questions about the Offer Process and Offer Letter, please contact your entity HR Department or refer to the Contact Resource page, found in the Managers section of the HR Website under Recruitment and Hiring.

<https://hr.duke.edu/managers/recruitment/successfactors>.