

Taleo eOffer Cheat Sheet

V1.2 – eOffer Pilot – January 2, 2017

Tip #1 - Moving the candidate to the Offer step

Advance the Candidate to the **Offer** step and **Offer to be made** status.

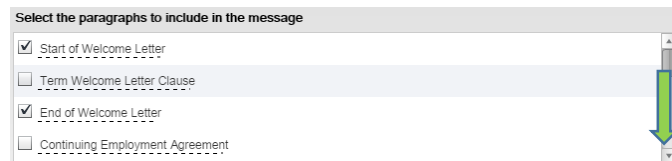
If using **Change Step/Status...** from the 'More Actions' menu, make sure that you don't accidentally reject the candidate once they reach this step.

Tip #2 - Creating an eOffer

More Actions > Create Offer.

Make sure to include optional fields if appropriate [Part Time Percentage of FTE / USW Step], then click **Select Offer**.

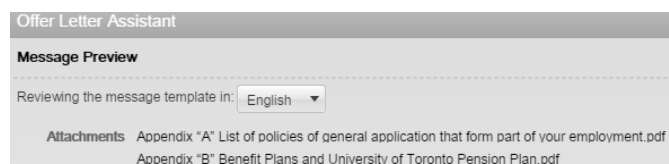
Tip #3 - Make sure all relevant clauses are selected



! You must select certain clauses, dependent on if the position is continuing or term

- **Mandatory clauses:**
 - Term Welcome Letter Clause [only select if Term]
 - Continuing Employment Agreement **OR** Term Employment Agreement
 - Continuing Termination **OR** Term Termination
- **Optional clauses:**
 - BURC Policies & Procedures [only select if position is challenged by BURC]

Tip #4 - Attach the Position Description



Click **'Edit'** on the preview screen of the Offer Letter Assistant. Further Instructions can be found in the eOffer documentation on page 6.

Tip #5 - Issue eOffers, not Emails



This field defaults to **'Email'**. When sending an offer letter, you **must** change the 'Send message by' dropdown field to **'E-Offer'**.

You will be cc'd on the E-Offer invite; if you receive an emailed copy of the offer letter instead, you can send an e-Offer email via More Actions > Send Offer, then selecting E-Offer this time.

Tip #6 - No eOffer Template Available

1. **Internal Candidate:** At this time, eOffers are only available for external hires. You must use an offline employment contract for any other hires. Once the candidate has accepted their offline employment contract, skip the eOffer step by changing **Step/Status to Hire > Offer Accepted**.
2. **Not a PM, Confidential, or USW posting:** At this time, eOffers are only available for PM, Confidential, and USW positions. Any other requisitions will have access to the eOffer Workflow, but there are not templates available for these offers at this time.
3. **Created offer before moving candidate to Offer > Ready for Offer:** Save the offer grid, then edit the offer and you'll be able to select the eOffer template.

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