Cornerstone – Offer Letters, Background Check, and Hiring

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Cornerstone Offer Letters, Background Check, and Hiring Overview:

1. Offer letters can be created and sent through Cornerstone.

2. Background checks are processed through Cornerstone by simply changing the applicant status.

3. When hiring the last applicant for a search, all other applicants should be dispositioned prior to changing the last applicant status to hired and prior to closing the requisition. NOTE: applicants should already be dispositioned prior to the approval to make an offer.

4. Use this job aid to learn how to create and send an offer letter, change the applicant status for a background check and how to finalize the requisition by hiring and dispositioning all applicants.

5. If you have any questions, please contact ihr-hrais@illinois.edu.
How to Access the Cornerstone System:

1. Open internet browser and go to: apps.illinois.edu
2. Select Cornerstone - Urbana (found on the Human Resources card)
3. Log in to Cornerstone using your net ID and password

Access Manage Candidates:

1. From any page in Cornerstone, access the main menu in the upper right corner of the page and choose Recruit, Manage Candidates (NOTE: You can also access Manage Candidates by selecting the number under the applicants column on the Manage Requisitions page.)
   a. Select the menu:
   b. Select Recruit, Manage Candidates:
c. On the Manage Candidates page, enter filters and/or search criteria to find your applicant (refer to the Managing Candidates job aid if needed):

Change Applicant Status:

1. Applicants must be in Offer Letter status to access the Offer Letter functionality. To change the status of the applicant, choose the checkbox beside their name and press Change Status.
2. Change the new status to Offer Letter and press Save at the bottom of the screen.

3. When you return to the Manage Candidates page, you will now see the Create Offer Letter button under the status. Click this button to access the Offer Letter section.
Create Offer Letter:

1. The Create Offer Letter button will take you to the Applicant Profile page, the Statuses tab:

2. Scroll down to the bottom of the page until you see the Create New Letter button under the Offer Letter status. Press this button to access the Offer Letter templates.

3. At the top of the page is the name of the offer letter. This can be changed if desired. This will be viewable by the applicant either as a link to the offer letter or as the name of the offer letter as an attached document.
4. The first item of the offer letter is the Hiring Department and Template. This Hiring Department is not used in the offer letter, so there is no need to make any modifications (though it’s fine if you do).

5. If an offer letter template was assigned at the time of editing the requisition, it will be pre-populated. Whether or not it is pre-populated, you can select the appropriate template to use for this offer.

6. Once you have selected the offer letter, it will be populated on the right side of the page. You can keep changing the offer letter template to see which one is most appropriate as needed. Press the Next button to proceed.
7. The next item is Add Sections (optional).

8. Offer letter templates are created by sections. Those that have names (e.g., Candidate Address – Name Only) have been created to be re-usable in multiple templates. Those that do not have names (e.g., Custom Section 1) have been created solely for this template. Regardless of whether the sections are for use in multiple templates or in just this template, they can be modified for this letter provided the section is not locked.

   a. Locked sections are denoted with a lock symbol. This represents required language for this offer letter template. The text may not be modified and the section may not be removed; however, the section may be moved around in the letter.

   b. To move sections in the letter, you can choose the up and down indicators in the Add Sections side menu. You may also remove an unneeded section, by selecting the trash can (provided it is not locked).

   c. You can also add an existing section to the letter. Existing sections contain all the reusable sections for templates including those that are used in this template. There are also sections that might be included in some letters such as moving expenses. To add an existing section, Choose Add Existing.
d. You can add sections by selecting the checkbox beside the name and press add. If you have a specific section, you are looking for you can enter in search criteria.

![Select a Section]

- Enter Search Criteria
- Choose the Section/s
- Press Add to Add Section/s
- New Section Added to Bottom
- Use Arrows to move Section
- Add Existing
- Add Custom

![Offer Acceptance Date and Signatur...]

- Custom Section 3
- Moving Expenses - Direct Payment a...
- Add Existing
- Add Custom

e. The existing section is added at the bottom of the sections list. Move this by using the arrow keys to be in the location you would like.

![Moving Expenses - Direct Payment a...]

f. To add a new section, choose Add Custom.
g. This will insert a new section directly into your letter at the bottom. You can add text as desired using the formatting tools that are available. Press Apply when you are finished. You can then move the section to where you would like it in the letter.
   a. **NOTE:** There is an image button available in the formatting tools; however, the image needs to first be uploaded by a Cornerstone Administrator. A URL will then be provided to you along with instructions. Inserting an image in another way will not render properly in the letter that is sent to the applicant (even though it looks like it will). Send an email to **ihr-hrais@illinois.edu** for assistance in uploading an image.

h. To edit an existing section in the letter, hover over the section until you see the tools appear in the upper right corner of the section. Select the pencil tool to edit the section.
i. You may notice there are “tags” contained in the section. These appear in capital letters typically with a period between the words. For example, 
PROFILE.USER.NAME.FIRST is the first name of the applicant. If you wanted to replace the first name in the letter below and replace it with Dr., you would need to fully replace the tag name.

j. The first name tag has been changed to Dr in the example below. Many of the tags start with the work OFFER and these will be populated in the next tab in the offer letter. Also note that there is space at the top of the paragraph. All sections should have a space at the top to help with the spacing in the letter. If the space is at the bottom, it is often truncated, so be sure to add the space at the top. Once you are finished with your edits press Apply.
k. Additional options when hovering over a section are the move arrows, delete (for unlocked sections) and adding sections. These work the same as when doing these actions in the left-hand section menu. To access the Add Custom or Existing Section, press the three dots.

l. When finished editing the sections of the letter, press next to go to the next item, Complete Fields.
9. The next item is Complete Fields. This is where you will populate some of the “tags” that are used in the offer letter. The Notes item is not used but can be populated with information as needed. Tag names are descriptive of their field name. Not all fields are used in every template; however, if you populate a field that is not used, it just doesn’t appear in the letter. If you don’t populate a field that is used, then a space will appear in the letter where the value is supposed to be. There are some required fields that are used in all letters and are denoted with an asterisk (*).
2. After you have completed all the appropriate fields, press Next to proceed.

3. Before proceeding to the next step, this is a good time to preview the offer letter. This will allow you to review spacing and to be sure that all the fields are showing correctly. To do this, press the Preview Letter button in the upper right corner of the page.
4. This will generate a PDF download which you can open to review how this will look. The salary amount may not be formatted correctly (no commas), but it will be in the generated letter. The spacing will reflect accurately. So, if your letter is not displayed as you wish, you can still modify it.

5. To make any corrections, return to the offer letter and hover over the section you would like to change and choose the pencil icon. If you want to change the values of one of the “tags” you can return to the Complete Fields tab by clicking on it.
6. You can continue to preview and modify the letter as many times as you wish. However, nothing is saved until you press the Generate Letter button. If you wish to save your changes and return later, you should choose Generate Letter. Although it will generate a letter, it is not sending it and it can still be modified. Once you have made any changes you wish, click on the Generate Letter button.

7. The letter might take a minute to generate and will return you to the Statuses tab. Typically, it will prompt you to press the Refresh button.
8. Once you have selected the Refresh button (if needed), you will be able to see the offer letter information. To view the offer letter, click on the icon under the Offer column.

9. A pop-up window will open and display the letter. Notice that the salary is now formatted correctly with commas. You can view the pdf version of the letter by selecting the red icon beside Offer Letter. If you wish to see the fields that you entered select the down arrow that is to the right of Offer Details.
10. You will not be able to make any changes here but can see all the fields entered regardless of whether they appear in the letter. You can click on the X in the upper right corner to close the window.

Add Approvers to Offer Letter:

1. If you wish to make changes to the letter, you can choose Create New Letter. This will start a new offer letter and will retain all the changes you made and fields that you entered. You will see a new Version once you generate the letter. The applicant will only see the letter that you send to them. If you would like to add approvers to review and approve this letter, press the View/Edit Approval link. Approvers will not be able to edit the letter, they can only approve/deny and add comments.
2. In the popup window, click the Add Approval link to add approvers. If you added Offer Letter approvers on the requisition, these will already be populated here.

3. Choose the plus sign beside the user type you would like to add. The only options that are currently used are Hiring Manager or User. When choosing User, you will be able to select any employee. You may add multiple approvers by choosing the plus sign beside User for as many approvers as you would like to add.
4. Once you have all the approvers added, press the Add button.

Select Approvers

Add approvers for this requisition. You may select Next Level Manager more than once for multiple levels of indirect manager approval.

<table>
<thead>
<tr>
<th>Remove</th>
<th>Name</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>User</td>
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<td>User</td>
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<td>Add</td>
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<td>Next Level Manager</td>
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<td>Corporation Approver</td>
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<tr>
<td></td>
<td>Hiring Manager</td>
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<tr>
<td></td>
<td>User</td>
</tr>
</tbody>
</table>

Choose Add
5. There are several options in the adding approvals window.
   a. Add approval link will allow you to add additional approvers.
   b. The trash can will allow you to remove an approver.
   c. The plus sign at the end of the approver box will allow you to add an alternate approver.
   d. Below each approver is the option for Approval Required and Notification Only. If you want this user to approve the letter, then you will choose Approval Required. If you only want to allow them access and to be notified the letter is generated, you will choose Notification Only.
   e. To add an approver, click in the User box.
   f. The approvals can be made sequentially or consecutively (or both). To order the approvals sequentially, enter the order starting with 1, 2, etc. Approvers will be notified in the order listed. To order the approvals consecutively, you can enter the same number for approvers. So, you can have two number 1s. Both approvers will receive an email at the same time and can approve at the same time. Any denial will mark the offer letter as denied regardless of if the other approvers have responded.
6. Enter search criteria on the boxes as needed to find the approver you would like to add. ID is the UIN and User Name is the NetID (the example below is a test user). Press Search to complete the search. To add the user as an approver, click on the name.

7. Once you have entered all the approvers, press the Save button. The reset to default button will remove all the approvers or default back to the offer letter approvers listed on the requisition.
8. Once you have added the approvers that you would like or if you did not have approvers, click on the Submit For Approval button. If you did not have approvers, it will just proceed to the Send to Candidate step.

9. While the offer letter is waiting for any approvals, you can see when it was sent and see which approver it is with by selecting View Details.

10. In the View Details window, you can see the status of the approvals and any comments that have been entered. You can always choose to cancel the approvals if desired. Choose close to close the window. The requisition owner will receive an email when the offer letter has been approved.
Send Offer Letter to Candidate:

1. Once the offer letter has been approved, you can now send the letter to the candidate by choosing Send Offer under the Send to Candidate column.

2. In the Send Offer window, there are several options:
   a. Offer Letter:
      i. Click on the document name to download a PDF of the offer letter
      ii. Choose to delete the offer letter by selecting the trash can icon
   b. Additional Attachments:
      i. Click Choose File to upload any attachments you would like to send to the candidate. One example is to send a signed letter of the offer letter.
   c. Send Methods:
      i. Candidate Profile – This will send an email to the candidate to tell them to go to their online profile to review the offer letter and then they can accept or decline the offer letter. The requisition owner will receive an email when they respond.
      ii. Email – This will send an email to the candidate with the offer letter and attachments attached to the email. The candidate will not see this in their profile and will not be able to respond through their profile. Be sure to include how they should respond either in the offer letter or in the instructions.
      iii. Paper Mail and Other – These are used to record information about sending the offer letter outside of Cornerstone.
iv. Instructions – The instructions section will appear in the email and online (for candidate profile). This can be used to provide additional information to the candidate.

3. Once you are ready to send the offer letter to the candidate, press the Send to Candidate Profile (or Send Email) at the bottom right of the window.
Review or Record Offer Letter Response:

1. If you use the method of Email, Paper Mail, or Other, you can still record the candidate’s response by choosing Record Response. This is not necessary if you use Send to Candidate Profile.

2. Select the candidate response and press save. The response method will say Candidate Profile, but it’s fine to save this response. When you select Accepted, you will be able to upload a final signed letter if desired and add notes. If the response is Declined, you can choose a reason for declining the interview and add notes.
3. If the candidate is reviewing the offer letter in their profile, they will have the option of accepting and then be prompted for a signature. If the candidate declines, they will be given a list of reasons to choose from and an opportunity to add notes. The screenshot below is an applicant view of the offer letter response page in their profile page.

4. Once the applicant has responded through their profile page, you will be able to see their response in their applicant profile page. To view their response (and comments/reason if declined), choose View Details under Candidate Response. To view the electronically signed offer letter, click on the icon under the Final column.
Background Check:

1. Once a candidate has accepted an offer, the next step would be to place the candidate in a background check status. There is nothing else that needs to be done during this process other than changing the status. The requisition owner will be notified when the background check has been complete, and the status of the applicant will be changed by IHR to Background Check Complete. To change the status to Background Check, go to the main menu, Recruit, Manage Candidates. Use the filters and search to find the candidate. Check the box beside the candidate and choose Change Status.

2. Choose the New Status of Background Check and then press Save. The Background Check will then process this record. No further action is needed at this time.
Completing the Hire and Closing the Requisition:

1. Once the background check has been completed for all hires for this requisition and all appropriate required forms have been completed, it is now time to close out the requisition. Return to the Manage Candidate page and enter in filters to pull in all open candidates for this requisition. Check the box beside the candidates that are not being hired with this requisition. Choose Change Status.

   1. Choose Candidates not Hired
   2. Change Status

2. Choose the New status of Closed/Dispositioned

Choose Closed/Dispositioned Status
3. Then choose the appropriate disposition reason. For the most recent list of dispositions and their usage, please review the Cornerstone - Applicant Statuses and Dispositions job aid. Press Save when finished.

4. For the candidate/s you are hiring with this requisition, check the box beside their name and chose the Change Status button.
5. The new status that you will now choose is Hired and then press Save.
6. If the number of candidates in a hired status equals the number of vacancies, the requisition will close automatically. If you decide to close the requisition because you will not be making any additional hires (and you have vacancies left) or if you had chosen Ongoing for the number of vacancies, you will need to close the requisition manually. To do this go to Manage Requisitions under the Recruit menu and then search for your requisition. Once you have found it, edit the requisition. If the requisition is already in a closed status, you will not be able to make any changes. At the bottom of the first page (general tab) of the requisition, change the status to Closed and then press Submit. Other options are Cancelled (typically used when you have decided not to proceed with this requisition prior to it being in an open status) and On Hold (removes it from an open status but you can re-open later if desired. Press Submit when you have the status changed. If you still have active candidates (not in a hired or closed status), you will be prompted to close the applicant records.