

IOWA STATE UNIVERSITY

# **Electronic Letter of Intent (ELOI) Presentation**

HR Liaison Meeting  
September 24, 2014

# Benefits of ELOI

- Expedited offer and acceptance process for hiring
- Standardized, electronic process to result in increased efficiency and improved accuracy
- New Hire data integrity improved as a result of coordination between PA7 (incl. HP) and ELOI
- ELOI triggers the Onboarding process in A+
- ELOI maintained electronically
- Transition to unified Document Management for personnel records

# ELOI Team Members

**Chelsey Aisenbrey, SVPP**

**Tim Ashley, UHR**

**Brenda Behling, SVPP**

**Heidi Eichorn, COE**

**Randall Griffith, ITS**

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**Todd Hughes, ITS**

**Deb Nelson, ITS**

**Susan Simpson, ITS**

# ELOI Timeline

Project began	Summer 2013
Development	Ongoing / now weekly
Training materials generated	through 10/6/14
Training Study / Testing	through 10/24/14
Face to Face Training*	10/27-11/7/14
ELOI Go Live!	12/2/14

\* On-line, tutorial training will be offered in addition

# ELOI Development Phases

- **Phase I:** Create an electronic offer for hires managed through the PA system (for faculty and P&S postings) **Go Live! 12/2/14**
- **Phase II:** Create an electronic offer for all term renewals (for faculty and P&S), for K-base hires (Coaches in Athletics), and for other non-competitive appointment types **Go Live! TBD**

*Note: Post Doc and Grad Asst ELOI, and Merit Confirmation Form currently under discussion for Phase II*

# ELOI “Basics”

- ELOI document creation and workflow within A+
- ELOI utilizes data from the Hiring Proposal (PA7)
- ELOI created upon “Final Verbal Offer Details” status (next day), so the hiring unit decides when to trigger the ELOI based on known **FINAL** salary, start date, etc.
- ELOI Originator(s) role created and maintained for origination/routing of ELOI for each dept code
- ELOI process ends with candidate accepting or declining the offer (Note: Posting Admin still “confirms hire” in order to finalize the PA record)

# Hiring Authority and Approval

## **ISU Hiring Authority Policy dictates approval roles / delegation!**

- **Primary Approver** role defined by IR table for unit head with authority for hiring for each dept code
- **Secondary Delegate Approver(s)** role created and maintained for delegated approval
- Approvers review, and approve or reject each ELOI
- For joint hires, a second and third unit may be added by the ELOI Originator to trigger addl approval workflow
- Ability to edit/maintain roles for ELOI Originator(s) and Secondary Delegate Approver(s) locally

User Role	Definition / Scope
<b>eLOI Originator</b>	<p>The eLOI originator is the individual(s) who initiates the letter of intent. The eLOI originator(s) will be responsible to finalize the eLOI, and initiate the routing for internal approval.</p>
<b>Primary Approver</b>	<p>The primary approver has ultimate authority for hiring within the department, college, or division and reviews/approves eLOIs.</p> <p>The Primary Approver may further delegate approval for eLOIs per the “Hiring Authority Policy” via the Kualii “eLOI Appr Role” screen. *</p> <p>[Each department, college and division has a single primary approver. We will utilize the master department code listing that is maintained in Institutional Research (IR) to record and regularly update who is the senior administrator/primary approver for each department code. The workflow will be based on a predetermined hierarchy (i.e., department to college) for each department code.]</p>
<b>Secondary Delegate Approver</b>	<p>The secondary delegate approver(s) has delegated authority for hiring within the department, college or division per the “Hiring Authority Policy.” *</p> <p>The secondary delegate approver(s) has the same access and role as the primary approver to review/approve eLOIs.</p> <p>This role may be used for persons that regularly review the eLOIs prior to approval (i.e., HR Liaisons reviewing for Dean).</p> <p>The secondary delegate approver(s) has rights to update who is the eLOI originator(s) for the respective department code (as delegate for the primary approver) within the Kualii “eLOI Appr Role” screen, as staff turnover occurs.</p>



# Other Key Issues

- Certain fields (e.g., Special Conditions) on the ELOI will be editable by the ELOI Originator; others are populated from HP data and cannot be edited. The fields are locked once the ELOI is routed by the Originator.
- Originators and approvers may attach documents (i.e., letter of offer) as PDF to the ELOI (NOTE: viewable by approvers and candidate; some documents will not be accessible by candidate)
- Multiple ELOIs may be generated per posting/HP (e.g., each ELOI created has a unique “eDoc” number)
- Revisions may be processed by starting over with a HP (e.g., new start date will require a new ELOI)

# How You Can Help

- Complete the ELOI Originator role and Secondary Delegate Approver role project survey now (if you have not already done so)
- Offer to test, or recommend staff as testers (testing period of Oct. 20-24)
- Sign up for training, and encourage departmental staff to sign up for training (for ELOI originators and approvers – Oct. 27-Nov. 7)

# QUESTIONS?