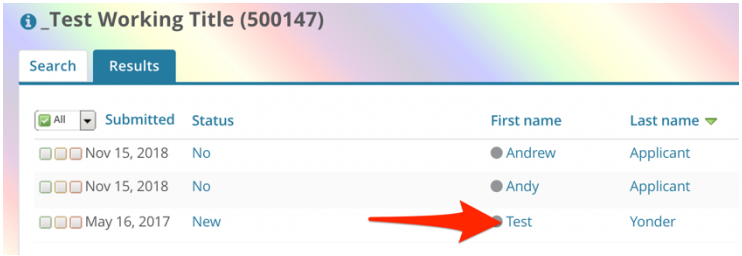
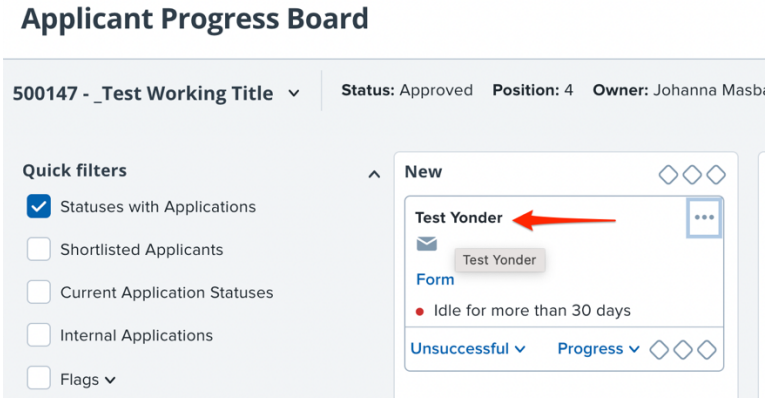
Making an Offer - Temporary Professional

What you need to do	What you will see
STEP 1: Select the candidate There are two ways you can locate the candidate. **Method 1 – Manage applications page.** On the requisition, head to the **Manage applications** page. On the selected candidate's record, click their name. **Method 2 – Applicant progress board** Navigate to the identified candidate's bubble. Select anywhere in that bubble.** In both methods, you will be taken to the selected person's applicant card. ***For this feature to work, you must have enabled pop-ups in your browser. For Google Chrome, you can follow this link for instructions.*	**Method 1**  **Method 2** 

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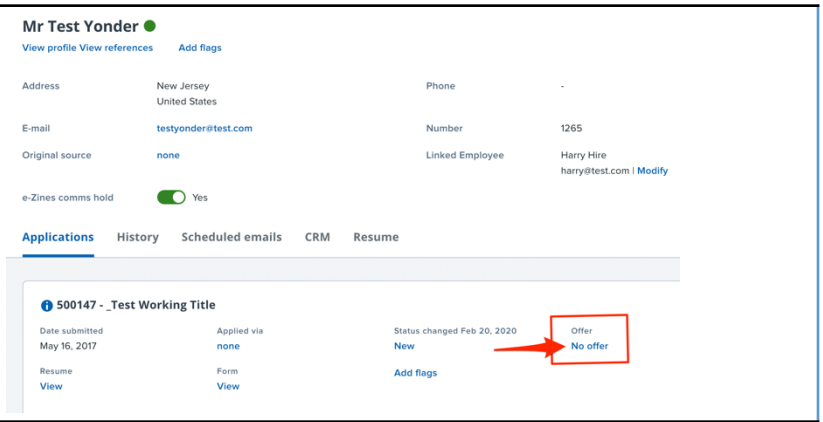
STEP 2: Go to the offer card.
From the applicant card, find the appropriate requisition. *(Please note: Applicants may have applied to multiple jobs. All will appear on this listing.)*

In the offer section, click **No offer.** You will be taken to the offer card.

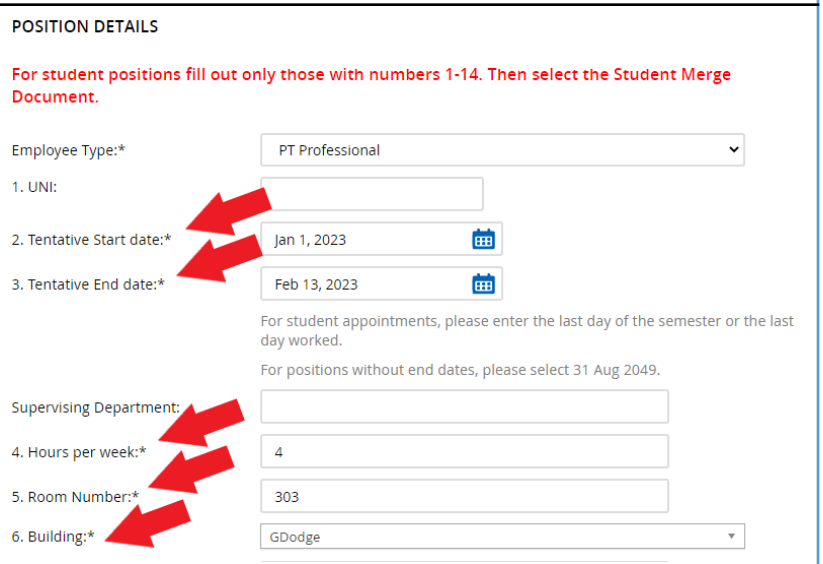


STEP 3. Complete the offer details card Position

In **Employee Type**, please choose **PT Professional**.

For 3- Tentative End date: Input the tentative end date.

Note: Mandatory fields are indicated with an **asterisk ***.

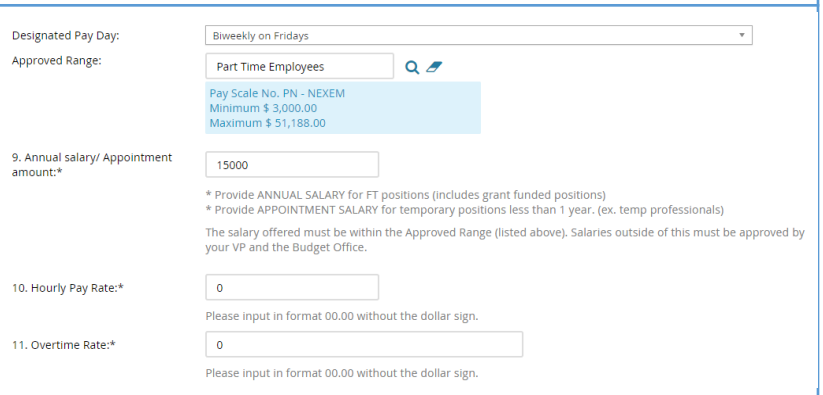


STEP 3.1: Salary Section

The Annual salary, Hourly pay rate, and overtime rates must be filled in regardless of the status of the position.

Input the pay information as follows:

- 9 -Enter the total appointment amount.
- 10 - enter “0” for the hourly rate
- 11 - enter “0” for the overtime rate.



Please note: do not enter a dollar sign, as it will error out these fields.*

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STEP 3.2

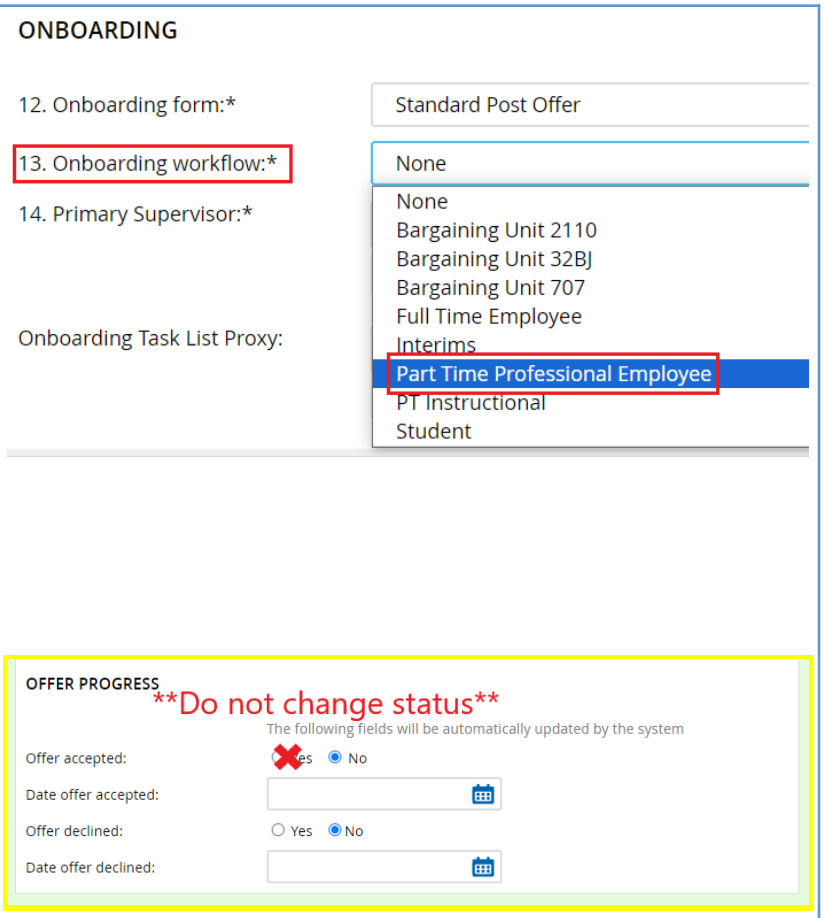
Go to **12 - Onboarding form.**

- For new hires, select **Standard Post Offer**
- For current employees, select **Current Employees Post Offer**

One notable mandatory field is the **Onboarding workflow.**
Please ensure you select the correct onboarding workflow as this affects the background check process. *Temporary Professionals should select the **PT Professional Employee workflow**.*

(If the **incorrect Onboarding workflow** *is chosen it can unnecessarily delay their onboarding process*).

Note: You may see just below this section the Offer Accepted button. Even if you have received a verbal acceptance from your candidate **please do not click yes.** This will automatically change once your candidate completes their steps.

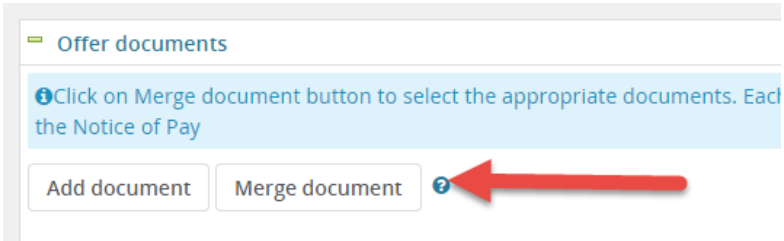


STEP 4

Merge Offer Documents

Every offer must have an ***Offer Letter*** **and a *Pay Rate Form*** (legally required by New York State law) If either of these documents are missing from the offer, the offer approver will decline and you will be required to update accordingly.

Click **Merge document**.
A pop up box will ask you to save the offer card. Click **Ok.** *(Please ensure you disable any pop up blockers or allow them for PageUp)***.**



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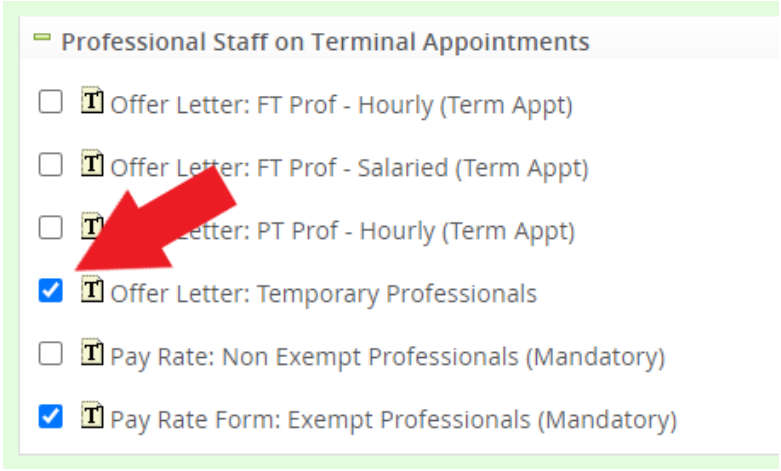
STEP 4.1

A **Document merge** box will pop up. Navigate to the folder of the applicable employee group. Select an *Offer Letter* and a *Pay Rate Form* based on the employee type.

For Temporary Professionals:
Navigate to the **Professional Staff on Terminal Appointments** folder.

- Select **Offer Letter: Temporary Professionals**
- Select **Pay Rate Form: Exempt Professionals**

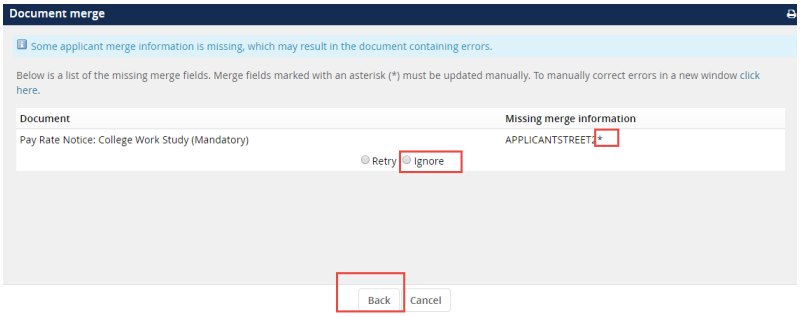
Once you have checked **both** of your applicable letters, click **Merge**.



STEP 4.2

A different **Document merge** box will appear. The system pulls information directly from the *Offer details* card and populates it onto the *Offer Letter* and *Pay Rate Form*.

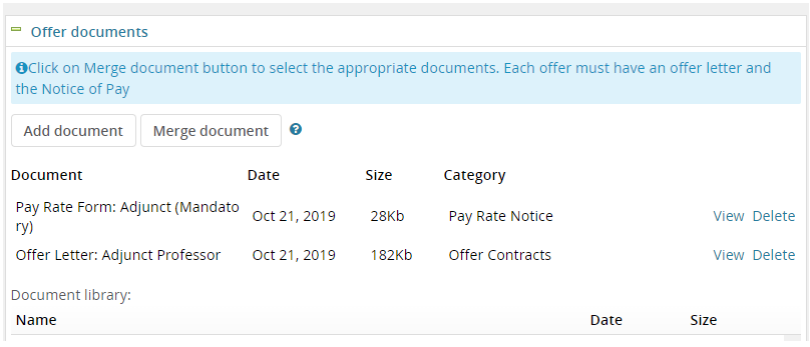
An asterisk designates any missing mandatory fields as noted in all of **steps 3**. Click **Back** to fix the issue. If no changes are needed, click **Ignore**.



STEP 4.3

You will be taken back to the *Offer Details* card and can find your newly merged offer documents in that section.

Always click **View** to download & review the offer documents. *Remember these are legally binding documents.*



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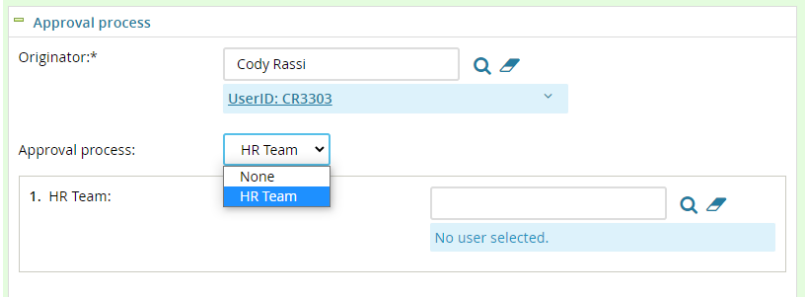
STEP 5: Select the approval process

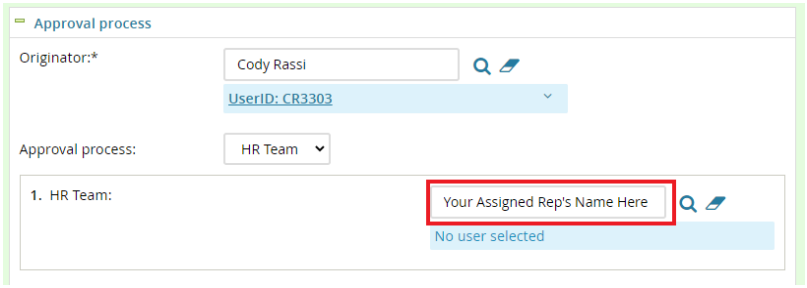
From the drop down menu, select **HR Team**



STEP 5.1

Enter the name of your aligned HR Representative. If you do not know who that is, you can look it up on the HR website or click here.

To track the candidate's status from this point, see the additional notes below.



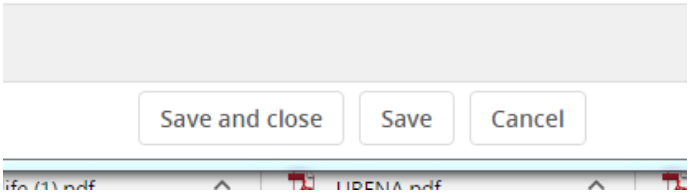
STEP 5.2

Save Offer details card.

Click **Save**. Click **Okay**.

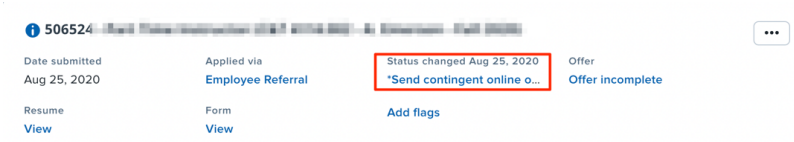
Now your offer card is complete and saved.

An approval notification will be sent to your HR representative. Once they have approved the offer, they will send it to the applicant for electronic response.



STEP 6: Additional Notes: Tracking the Applicant's Hiring Process

You can check the status of the applicant's hire process by viewing the **Status** section on the applicant card.



Application Status	Action Needed
New	Create offer
Send contingent online offer	Offer sent to candidate, but they have not accepted the offer nor completed post offer forms
Offer accepted	Candidate accepted offer, but needs to complete post offer forms.
HR USE ONLY: Background check pending	None. Background check in progress.
HR USE ONLY: Background check complete	None. Offer process is complete and candidate will be processed.
HR USE ONLY: Offer Forms Complete	None. Candidate completed offer forms.

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