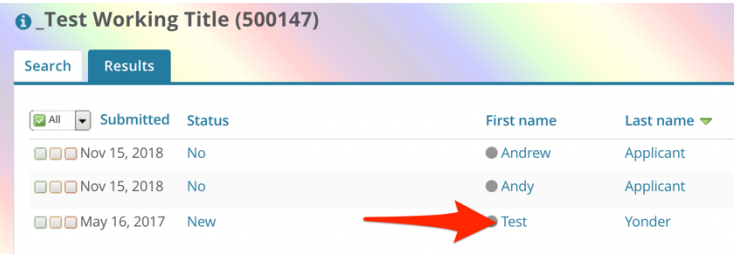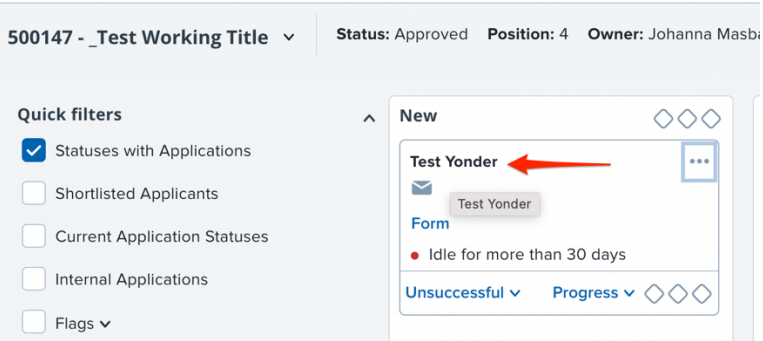# Teachers College
COLUMBIA UNIVERSITY

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**

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.

Mr Test Yonder 🟢
View profile View references   Add flags

Address	New Jersey United States		Phone	-
E-mail	testyonder@test.com		Number	1265
Original source	none		Linked Employee	Harry Hire harry@test.com | Modify
e-Zines comms hold	🟢 Yes			

Applications   History   Scheduled emails   CRM   Resume

ⓘ 500147 - _Test Working Title

Date submitted	Applied via	Status changed Feb 20, 2020	Offer
May 16, 2017	none	New	No offer
Resume	Form	Add flags	
View	View		

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 ***.

POSITION DETAILS

For student positions fill out only those with numbers 1-14. Then select the Student Merge Document.

Employee Type:* [PT Professional ▾]

1. UNI: [ ]

2. Tentative Start date:* [Jan 1, 2023 📅]

3. Tentative End date:* [Feb 13, 2023 📅]

For student appointments, please enter the last day of the semester or the last day worked.

For positions without end dates, please select 31 Aug 2049.

Supervising Department: [ ]

4. Hours per week:* [4]

5. Room Number:* [303]

6. Building:* [GDodge ▾]

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.

Designated Pay Day: [Biweekly on Fridays ▾]

Approved Range: [Part Time Employees] 🔍 ✏️

Pay Scale No. PN - NEXEM
Minimum $ 3,000.00
Maximum $ 51,188.00

9. Annual salary/ Appointment amount:* [15000]

* Provide ANNUAL SALARY for FT positions (includes grant funded positions)
* Provide APPOINTMENT SALARY for temporary positions less than 1 year. (ex. temp professionals)

The salary offered must be within the Approved Range (listed above). Salaries outside of this must be approved by your VP and the Budget Office.

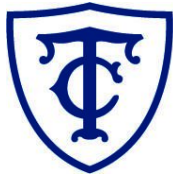10. Hourly Pay Rate:* [0]

Please input in format 00.00 without the dollar sign.

11. Overtime Rate:* [0]

Please input in format 00.00 without the dollar sign.

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

Teachers College
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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.

ONBOARDING

12. Onboarding form:*   Standard Post Offer

13. Onboarding workflow:*   None

None
Bargaining Unit 2110
Bargaining Unit 32BJ
Bargaining Unit 707
Full Time Employee
Interims
Part Time Professional Employee
PT Instructional
Student

14. Primary Supervisor:*

Onboarding Task List Proxy:

OFFER PROGRESS

Do not change status

The following fields will be automatically updated by the system

Offer accepted: ❌ Yes ●No

Date offer accepted:

Offer declined: ○ Yes ●No

Date offer declined:

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)*.

Offer documents

ⓘ Click on Merge document button to select the appropriate documents. Each the Notice of Pay

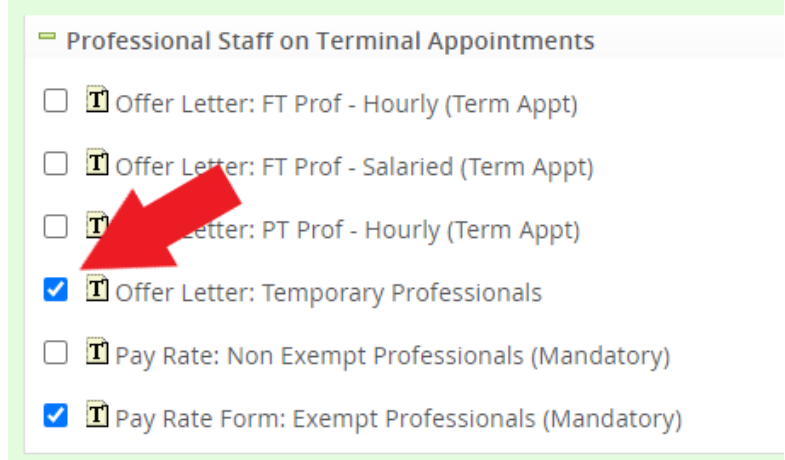| Add document | Merge document | ❓ |

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**
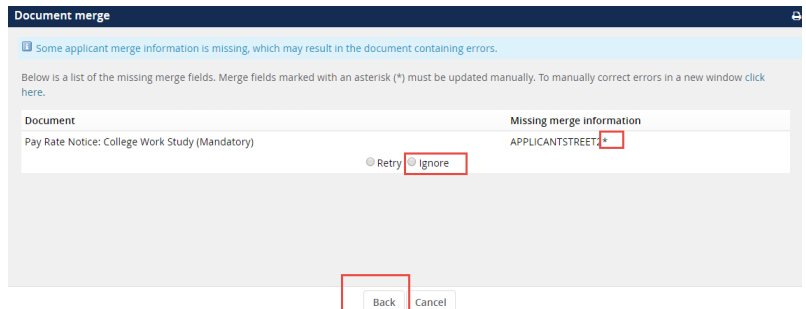- Select **Pay Rate Form: Exempt Professionals**

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

Professional Staff on Terminal Appointments

- ☐ **T** Offer Letter: FT Prof - Hourly (Term Appt)
- ☐ **T** Offer Letter: FT Prof - Salaried (Term Appt)
- ☐ **T** Offer Letter: PT Prof - Hourly (Term Appt)
- ☑ **T** Offer Letter: Temporary Professionals
- ☐ **T** Pay Rate: Non Exempt Professionals (Mandatory)
- ☑ **T** Pay Rate Form: Exempt Professionals (Mandatory)

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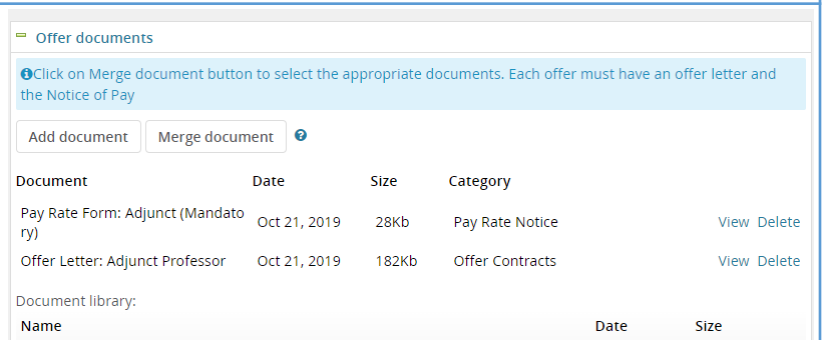
An asterisk designates any missing mandatory fields as noted in all of **steps 3**. Click **Back** to fix the issue. If no changes are needed, click **Ignore**.

Document merge

Some applicant merge information is missing, which may result in the document containing errors.

Below is a list of the missing merge fields. Merge fields marked with an asterisk (*) must be updated manually. To manually correct errors in a new window click here.

Document	Missing merge information
Pay Rate Notice: College Work Study (Mandatory)	APPLICANTSTREET2*

○ Retry ○ Ignore

Back   Cancel

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.*

Offer documents

Click on Merge document button to select the appropriate documents. Each offer must have an offer letter and the Notice of Pay

| Add document | Merge document | ? |

Document	Date	Size	Category		
Pay Rate Form: Adjunct (Mandatory)	Oct 21, 2019	28Kb	Pay Rate Notice	View	Delete
Offer Letter: Adjunct Professor	Oct 21, 2019	182Kb	Offer Contracts	View	Delete

Document library:

Name	Date	Size
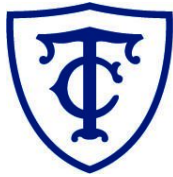
STEP 5: Select the approval process From the drop down menu, select **HR Team**	**Approval process** Originator:* Cody Rassi UserID: CR3303 Approval process: HR Team None HR Team 1. HR Team: No user selected.
STEP 5.1 Enter the name of your aligned HR Representative. If you do not know who that is, you can look it up on the HR website or click <u>here.</u> To track the candidate's status from this point, see the additional notes below.	**Approval process** Originator:* Cody Rassi UserID: CR3303 Approval process: HR Team 1. HR Team: Your Assigned Rep's Name Here No user selected
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.	Save and close | Save | Cancel ifo (1) pdf UPENA ndf
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.	506524 Date submitted: Aug 25, 2020 Applied via: Employee Referral Status changed Aug 25, 2020 *Send contingent online o... Offer: Offer incomplete Resume: View Form: View Add flags | 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.	