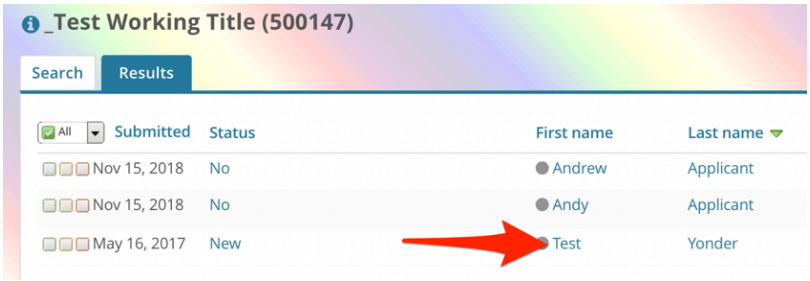
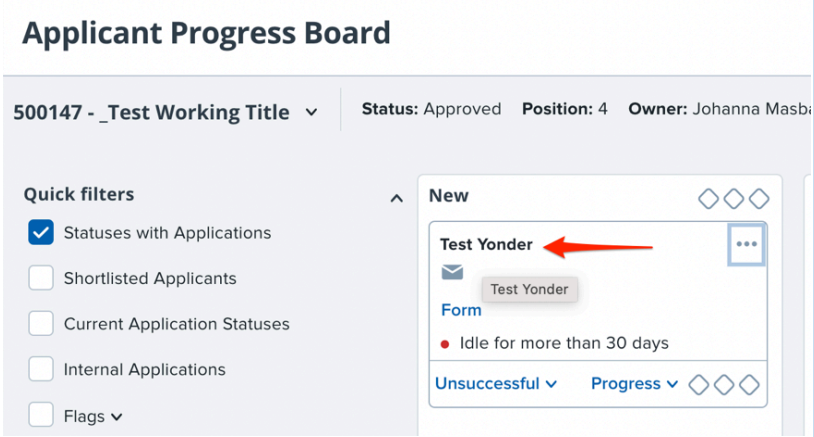
Making an Offer - Federal Work Study

This guide covers the offer creation process for employees in e-class 90.

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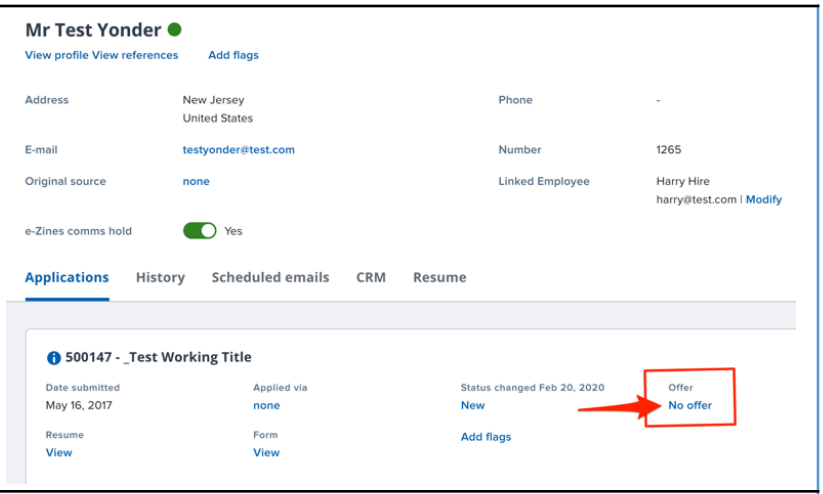
STEP 2: Go to the offer card.
From the applicant card, find the appropriate requisition. *(Please note: Applicants may have applied to multiple jobs. All will appear on this listing.)*

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

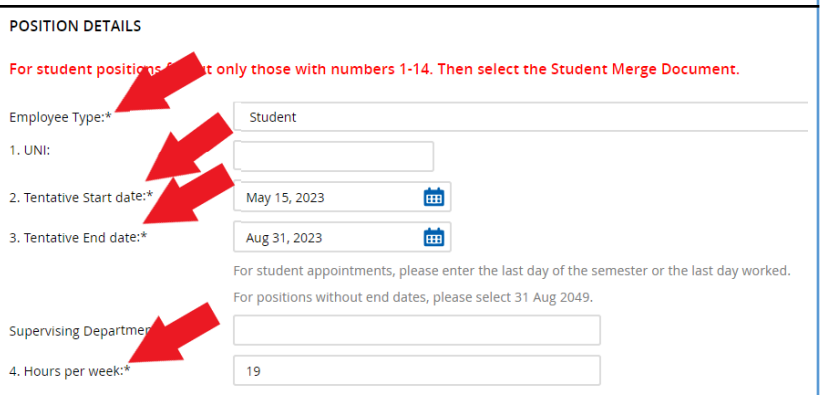


STEP 3. Complete the offer details card.
Complete all necessary fields for your offer. In **Employee Type**, please choose **Student**.

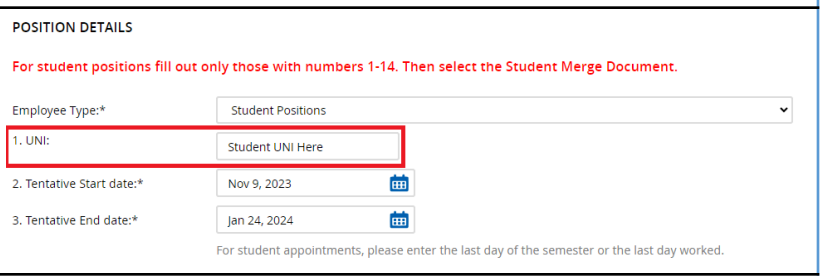
For 3- Tentative End date:

- *For College Work Study roles, can only be appointed for one year at a time. The End Date should be* ***no later than the end of the corresponding federal aid year i.e June 30.*** *The federal aid year runs from July 1 to June 30 of the following year.* .

Note: Mandatory fields are indicated with an **asterisk ***. Additionally, all offers have different required fields based on the auto-fill fields of the offer letter (generated in step 4).



STEP 3.1
In addition to all required fields (noted by the asterisks), you must also fill in the student's UNI. If left blank, your merged offer letter will not fill properly in **step 4**.



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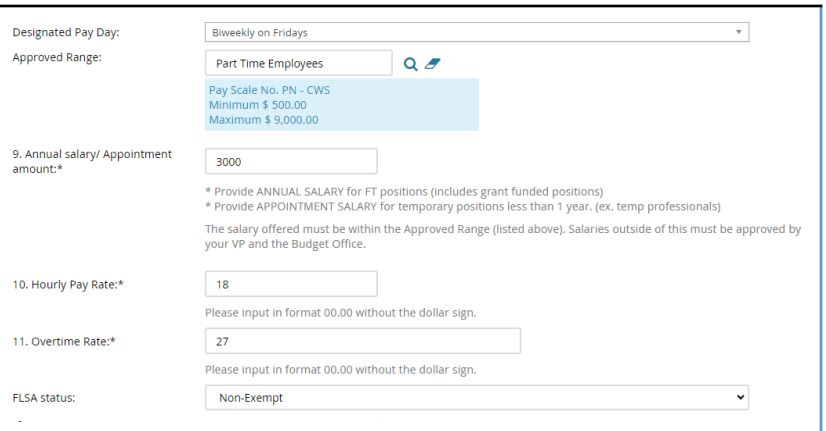
STEP 3.2: Salary

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 full appointment amount
- 10 - enter the hourly rate
- 11 - enter the overtime rates accordingly. You can use this tool to assist you: OT Calc

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



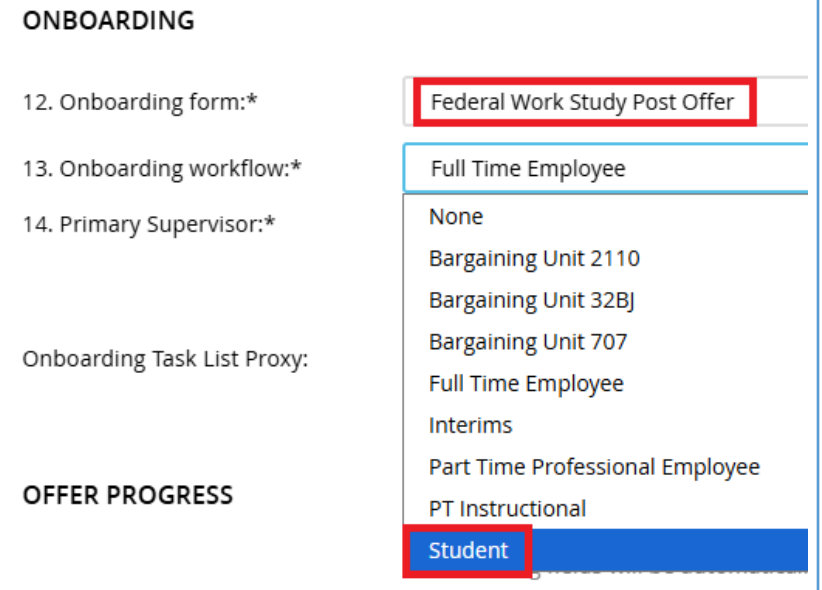
STEP 3.3:
Go to **12 - Onboarding form.**

- For brand new hires, select **Federal Work Study Post Offer**
- For current employees, select **Current Employees Post Offer Form**

One notable mandatory field is the **13 - Onboarding workflow.** Select **Student** for work study positions.

Please ensure you select the correct onboarding workflow as this affects the background check process

(Background checks are not applicable to student roles, however, if the **incorrect Onboarding workflow** *is chosen it can unnecessarily delay their onboarding process*).



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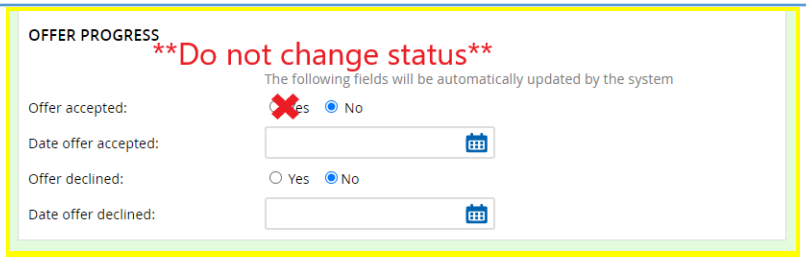
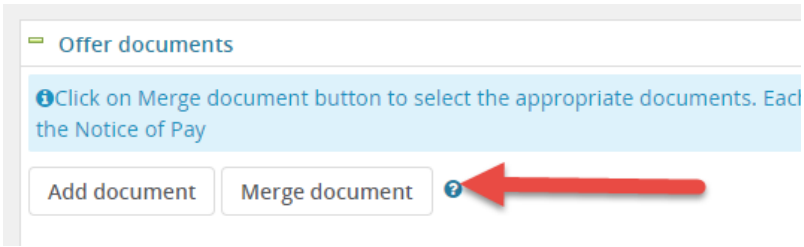
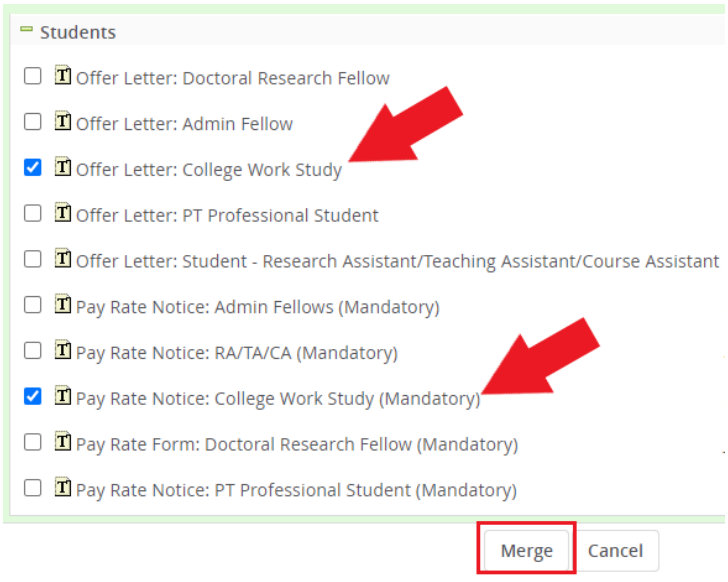
Step 3.3 Note: *Just below the Onboarding section you may see the Offer Accepted button. Even if you have received a verbal acceptance from your candidate* ***please do not click yes.*** *This will automatically change once your candidate completes their steps.*	
STEP 4 **Merge Offer Documents** Every 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.**	
STEP 4.1 A **Document merge** box will pop up. Navigate to the *Students* folder. Select **Offer Letter: College Work Study** and **Pay Rate Form: College Work Study.** Click **Merge**.	

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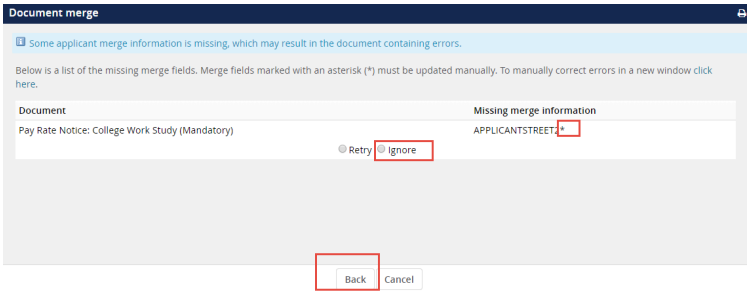
STEP 4.2

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*.

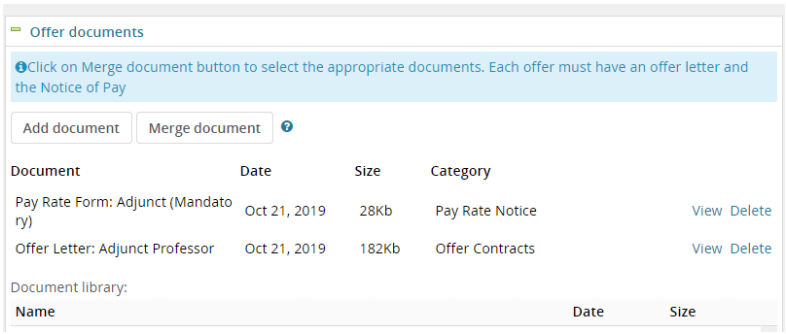
An asterisk designates any missing mandatory fields. Review all parts of Steps 3 - 3.3. Click **Back** to fix the issue(s). If no changes are needed, click **Ignore**.



STEP 4.3

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

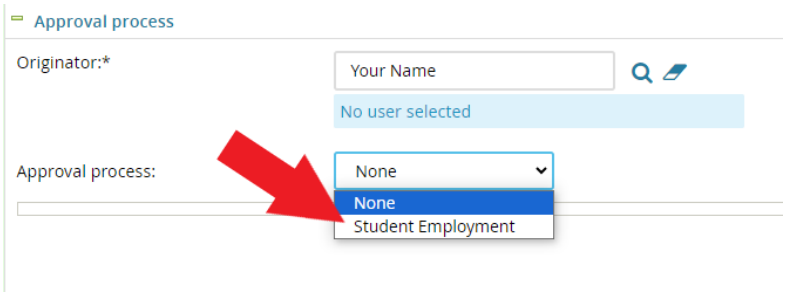
Always click **View** to review the offer documents. *Remember these are legally binding documents.*



STEP 5

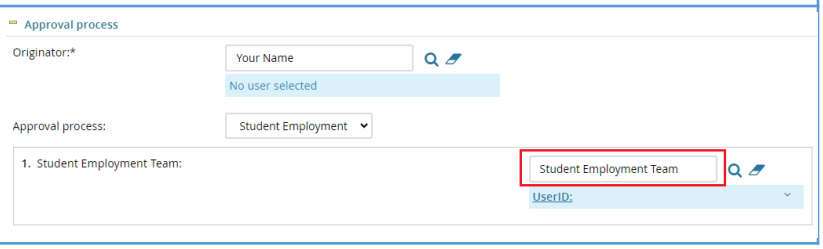
Select the approval process

From the drop down menu, select **Student Employment**



STEP 5.1

The approval line should stay with the default, Student Employment Team.



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STEP 5.2
Save Offer details card.
Click **Save**. Click **Okay**.

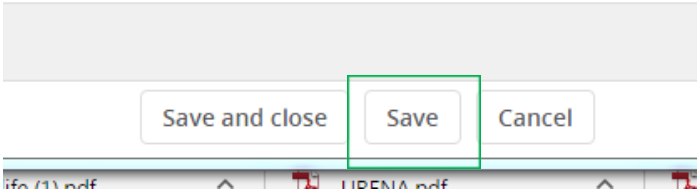
Now your offer card is complete and saved. The Student Employment team will review the offer details and respond to the offer.

However the Student Employment team responds, you will receive an email update.

If the offer is approved, **no further action is required on your part**.

The Student Employment team will send the offer to the candidate for electronic response.

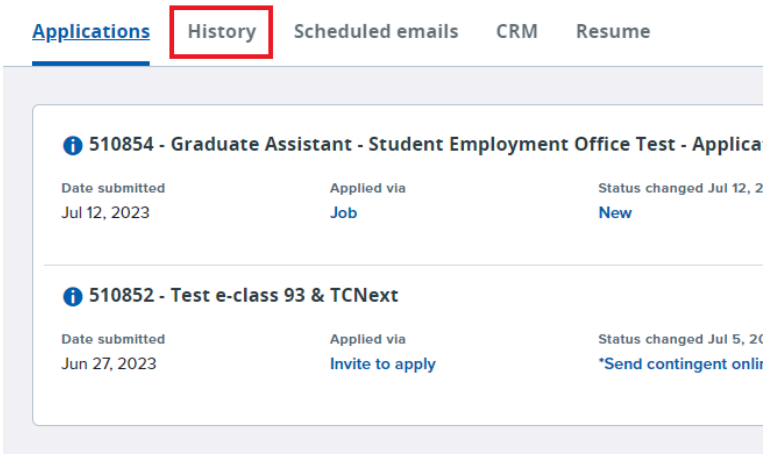
If it is declined, proceed to **Step 6**.

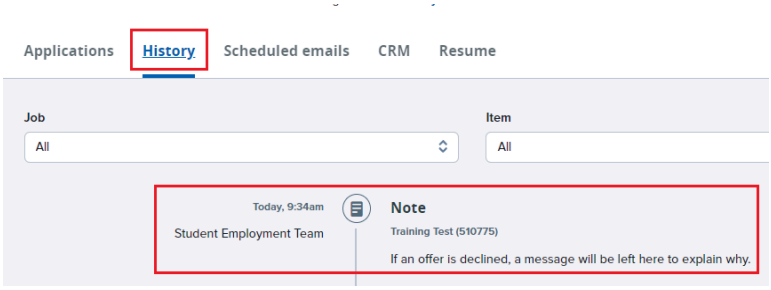


Step. 6 Review reason offer was declined.

If you received notice that your offer letter was declined, navigate to the Applicant Card. Click the History tab.

Scroll down until you see a note from the Student Employment Team. This will state the reason it is declined and what needs to be fixed.





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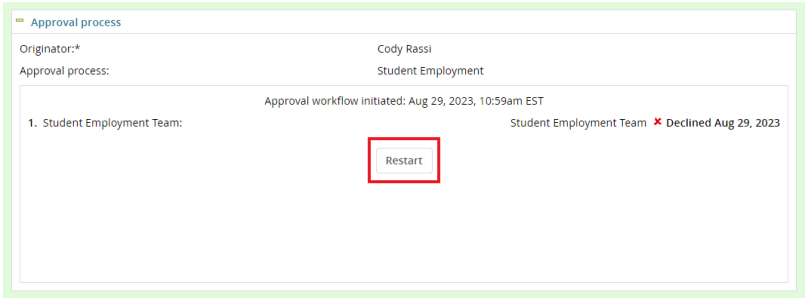
Step 6.1 Correct the offer card

To correct the error, return to the offer card by clicking Offer Incomplete (same location as the "No Offer" in step 2).

Scroll down to the Approval process section and click the **Restart** button to unlock the offer card. Make any changes requested by the approvers.

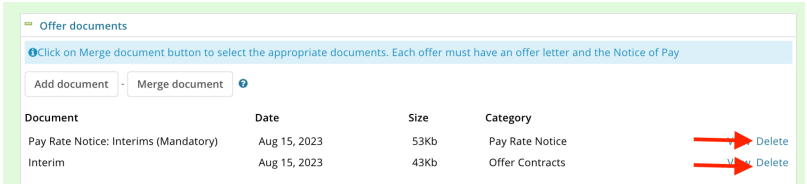
You will be required to delete the offer letter and pay rate notice, replacing them with updated versions. Proceed to the next step for specific instructions.



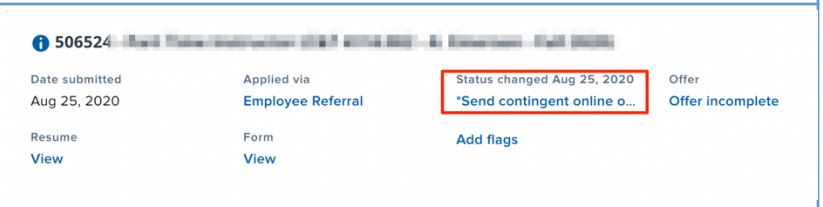
Step 6.2 Recreate offer documents and resubmit for approval.

Go to the Offer documents section. Remove the old offer letter & pay rate notice by clicking Delete.

Repeat **Step 4** to create new offer documents and **Step 5** to send through the approval workflow again.



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: Offer Forms Complete	Candidate completed offer forms and will be processed.