Making an Offer - Doctoral Research Fellow

This guide covers the offer creation process for Doctoral Research Fellow (eclass 88 / account 6442).

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **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 1  
![Manage applications page](image1.jpg)  
First name: Andrew  
Last name: Applicant  
First name: Andy  
Last name: Applicant  
First name: Test  
Last name: Yonder |
| **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. | Method 2  
![Applicant progress board](image2.jpg)  
Quick filters: Statuses with Applications, Shortlisted Applicants, Current Application Statuses, Internal Applications, Flags  
Form: Test Yonder  
Status: Approved  
Position: 4  
Owner: Johanna Masb  
New: Test Yonder  
Idle for more than 30 days  
Unsuccessful  
Progress |

**For this feature to work, you must have enabled pop-ups in your browser. For Google Chrome, you can follow this link for instructions.**
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.

Tentative End date: Enter the date the position ends as indicated on the award document.

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). See Step 3.2 for a specific list for this offer.
STEP 3.1: 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 “0” hourly rate
- 11 - enter “0”

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

STEP 3.2
The following fields are required to generate your offer letter (picture right):

- Academic Departments
- Length of Appointment
- Term
- Semester Year

If left blank, your letter will not fill properly in step 4.

*NOTE: If these fields are not entered for DRF roles, the offer letter will be incomplete (which is a compliance violation) and will be declined by the approver.*

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**STEP 3.3 Onboarding Form:** choose Student post Offer

One notable mandatory field is the **Onboarding workflow**. For DRF hires, select **Student**.

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)*.

**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.

```
<table>
<thead>
<tr>
<th>12. Onboarding form:*</th>
<th>Student Post Offer</th>
</tr>
</thead>
<tbody>
<tr>
<td>13. Onboarding workflow:*</td>
<td>None</td>
</tr>
<tr>
<td>14. Primary Supervisor:*</td>
<td></td>
</tr>
</tbody>
</table>

Onboarding Task List Proxy:

**OFFER PROGRESS**  
**Do not change status**

The following fields will be automatically updated by the system

- Offer accepted: [X] Yes  [ ] No
- Date offer accepted: 
- Offer declined: [ ] Yes  [X] 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).

<table>
<thead>
<tr>
<th>STEP 4.1</th>
<th>A Document merge box will pop up. Scroll down to the <strong>Students</strong> folder.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>● Select <strong>Offer Letter: Doctoral Research Fellow</strong></td>
</tr>
<tr>
<td></td>
<td>● Select <strong>Pay Rate Notice: Doctoral Research Fellow</strong></td>
</tr>
<tr>
<td></td>
<td>You must select both applicable files and click <strong>Merge</strong>.</td>
</tr>
</tbody>
</table>
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 from steps 3 - 3.3. 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.

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, skip to Step 7.

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.
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.
STEP 7: Navigate back to the applicant card.
Once the offer is approved by the Student Employment Team, the hiring manager will receive an email notification indicating this.

Navigate back to the applicant card.
In the top menu bar, click Recent items.

From the drop down menu, you should see the name of your candidate.

Click on the applicant’s name and you will open the applicant card.

STEP 7.1: Send the offer to the candidate.
On the applicant card, navigate to your requisition. You will see that the offer is now Offer Incomplete. (This status will be updated after the applicant accepts the offer.)

Under status, click New.
STEP 7.2: Change the application status.

From the pop up box, select *Send contingent online offer* and click Next>

**Note, you may not see all of the listed application status. These vary depending on the recruitment process.**

STEP 7.3: Review email to be sent to candidate

In the ‘From’ field, replace the populated email with your own tc.edu email.

*By adding your email the applicant will know to communicate directly with you.*

Click Move now. This will send the email to the candidate.

They will be required to click on the Applicant portal link in the email to accept the offer and complete the post hire forms.

*Please encourage candidates to complete this step as soon as they receive this email.*

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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.

<table>
<thead>
<tr>
<th>Application Status</th>
<th>Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Create offer</td>
</tr>
<tr>
<td><em>Send contingent online offer</em></td>
<td>Offer sent to candidate, but they have not accepted the offer nor completed post offer forms</td>
</tr>
<tr>
<td>Offer accepted</td>
<td>Candidate accepted offer, but needs to complete post offer forms</td>
</tr>
<tr>
<td>HR USE ONLY: Offer Forms Complete</td>
<td>Candidate completed offer forms and will be processed</td>
</tr>
</tbody>
</table>

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