Making an Offer - Doctoral Research Fellow

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

### What you need to do

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Select the candidate</strong></td>
<td>There are two ways you can locate the candidate.</td>
</tr>
</tbody>
</table>

**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.**

### What you will see

**Method 1**

![Manage applications page](image)

**Method 2**

![Applicant Progress Board](image)

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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**.

**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.*

<table>
<thead>
<tr>
<th>Designated Pay Day:</th>
<th>Semi-monthly on 15th and last business day of month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved Range:</td>
<td>Part Time Employees</td>
</tr>
<tr>
<td>Pay Scale No. FN - DOCRF</td>
<td>Minimum $ 10,000.00</td>
</tr>
<tr>
<td></td>
<td>Maximum $ 30,000.00</td>
</tr>
</tbody>
</table>

**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.
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.
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).

STEP 4.1
A **Document merge** box will pop up. Scroll down to the **Students** folder.

- Select **Offer Letter: Doctoral Research Fellow**
- Select **Pay Rate Notice: Doctoral Research Fellow**

You must select both applicable files and 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 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**
In the approval line, select the Student Employment team. You can type in the name or use the magnifying glass.

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

Now your offer card is complete and saved.

STEP 5.3 Approve the offer card.
The Student Employment team will review the offer details and approve the offer. If the offer is declined for any reason, it will be indicated in the “History” section on the Applicant Card.

STEP 6: 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: 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 7.1: 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.**

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STEP 7.2: 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.

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 or 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>