# Making an Offer - FT Instructors and Lecturers

This guide covers the offer creation process for Full time Instructors (eclass 24 / account 6121) and Full Time Lecturers (eclass 25 / account 6161).

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Select the candidate</strong></td>
<td><strong>Method 1</strong></td>
</tr>
<tr>
<td>There are two ways you can locate the candidate.</td>
<td><img src="image1.png" alt="Manage applications" /></td>
</tr>
<tr>
<td><strong>Method 1 – Manage applications page.</strong></td>
<td><strong>Method 2</strong></td>
</tr>
<tr>
<td>On the requisition, head to the Manage applications page. On the selected candidate's record, click their name.</td>
<td><img src="image2.png" alt="Applicant progress board" /></td>
</tr>
<tr>
<td><strong>Method 2 – Applicant progress board</strong></td>
<td><strong>Quick filters</strong></td>
</tr>
<tr>
<td>Navigate to the identified candidate's bubble. Select anywhere in that bubble.**</td>
<td><img src="image3.png" alt="Quick filters" /></td>
</tr>
<tr>
<td>In both methods, you will be taken to the selected person’s applicant card.</td>
<td><img src="image3.png" alt="Quick filters" /></td>
</tr>
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</table>

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

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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.
In **Employee Type**, please choose **Full Time**.

**Note for field: 3. Tentative End date:**
- For open ended appointments, please input 8/31/2049
- For terminal appointments, input the tentative end date.

Complete the rest of the mandatory fields (indicated with an asterisk *) in the section.

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 REQUIRED
The fields listed below **must** be filled in order to generate your offer letter:
- Program Name
- Department Chair - Name
- Academic Departments
- Length of Appointment*
  (*Required for Lecturers only)

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

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

STEP 3.3
Go to **12 - Onboarding form.**
- For new hires, select **Standard Post Offer**
- For current employees, select **Current Employees Post Offer**

For **13 - Onboarding Workflow**, select **Full Time Employee**.

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

*(If the incorrect Onboarding workflow is chosen it can unnecessarily delay their onboarding process).*
### 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** *(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 **Full Time Instructional** folder.

**For FT Instructors:**
- Select **Offer Letter: FT Instructor**
- Select **Pay Rate Notice: FT Instructor**

**For FT Lecturers:**
- Select **Offer Letter: Lecturer**
- Select **Pay Rate Form: FT Lecturer**

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 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.

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>&quot;Send contingent online offer&quot;</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: Background check pending</td>
<td>None. Background check in progress.</td>
</tr>
<tr>
<td>HR USE ONLY: Background check complete</td>
<td>None. Offer process is complete and candidate will be processed.</td>
</tr>
<tr>
<td>HR USE ONLY: Offer Forms Complete</td>
<td>None. Candidate completed offer forms.</td>
</tr>
</tbody>
</table>