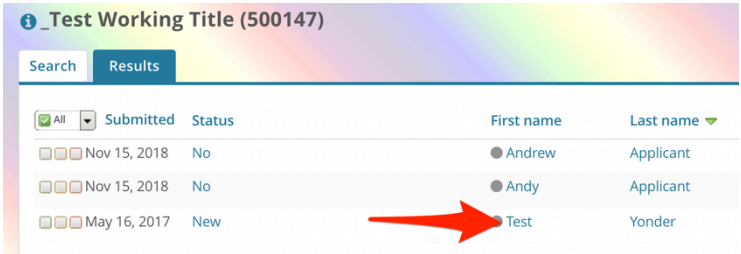
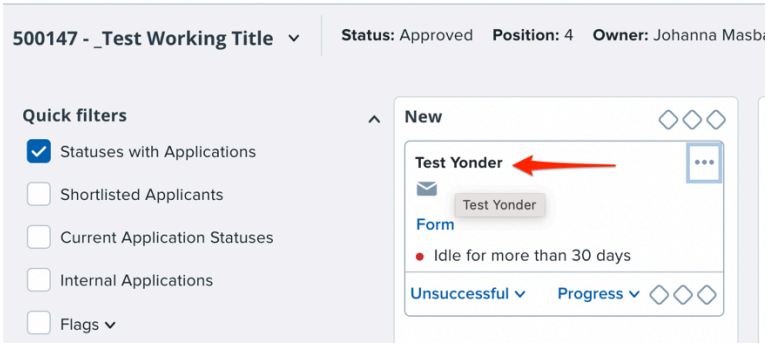


## Making an Offer - Fee Based Instructors

This guide covers the offer creation process for Fee Based Instructors (eclass 81 / account 6152).

What you need to do	What you will see
<p><b>STEP 1: Select the candidate</b></p> <p>There are two ways you can locate the candidate.</p> <p><b>Method 1 – Manage applications page.</b></p> <p>On the requisition, head to the <b>Manage applications</b> page. On the selected candidate's record, click their name.</p> <p><b>Method 2 – Applicant progress board</b></p> <p>Navigate to the identified candidate's tile. Select anywhere in that tile.**</p> <p>In both methods, you will be taken to the selected person's applicant card.</p> <p><i>**For this feature to work, you must have enabled pop-ups in your browser. For Google Chrome, you can follow <a href="#">this link</a> for instructions.</i></p>	<p><b>Method 1</b></p>  <p><b>Method 2</b></p> <p><b>Applicant Progress Board</b></p> 



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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.

#### 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   <a href="#">Modify</a>
e-Zines comms hold	<input checked="" type="checkbox"/> Yes		

[Applications](#) [History](#) [Scheduled emails](#) [CRM](#) [Resume](#)

#### 500147 - Test Working Title

Date submitted May 16, 2017	Applied via none	Status changed Feb 20, 2020 New	<a href="#">Offer</a> <a href="#">No offer</a>
<a href="#">Resume</a> <a href="#">View</a>	<a href="#">Form</a> <a href="#">View</a>	<a href="#">Add flags</a>	

### STEP 3. Complete the offer details card.

Complete all necessary fields for your offer. **Employee Type** should be All Other Pooled Positions

**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.

#### POSITION DETAILS

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

Employee Type:\*

1. UNI:

2. Tentative Start date:\*

3. Tentative End date:\*

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:\*

#### 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.\*

Designated Pay Day:

Approved Range:

Pay Scale No. PN - FEE  
Minimum \$ 0.00  
Maximum \$ 7,500.00

9. Annual salary/ Appointment amount:\*

\* 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:\*

Please input in format 00.00 without the dollar sign.

11. Overtime Rate:\*

Please input in format 00.00 without the dollar sign.



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### STEP 3.2 REQUIRED

The fields listed below **must** be filled in order to generate your offer letter:

- Term
- Semester Year

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

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

Term:	Select
Semester Year:	
Enter 4 digit year (ex. 2016)	
Semester Start Date:	<input type="text"/>
Semester End Date:	<input type="text"/>

### 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 **PT Instructional**

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).*

#### ONBOARDING

12. Onboarding form:\*

Standard Post Offer

13. Onboarding workflow:\*

PT Instructional

14. Primary Supervisor:\*

Onboarding Task List Proxy:

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



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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.

### 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. Scroll down to the **Part Time Instructional** folder.

- Select **Offer Letter: Fee Based Instructor**
- Select **Pay Rate Notice: PT Instructors**

Click **Merge**.

### Part Time Instructional

- ☐ Offer Letter: PT Instructor
- ☐ Offer Letter: Adjunct Professor
- ☐ Offer Letter: Community Teachers
- ☒ Offer Letter: Fee Based Instructor
- ☐ Pay Rate Form: Adjunct (Mandatory)
- ☒ Pay Rate Form: PT Instructors (Mandatory)
- ☐ Pay Rate Notice: Community Teachers (Mandatory)



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### STEP 4.2

A different **Document merge** box will appear. The system pulls information directly from the *Offer details* and merges 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**.

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

☐ Retry ☒ Ignore

Back Cancel

### STEP 4.3

You will return 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.*

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 **Self Approval: Pooled Positions Only**

Originator:\* Johanna Masbad UserID: JJM2220

Approval process: ☒ None ☐ Self Approval: Pooled Positions Only

### STEP 5.1

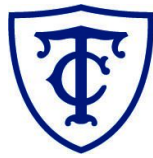
In the approval line, select your name as the user.

*You can type in your name or use the magnifying glass.*

Originator:\* Johanna Masbad UserID: JJM2220

Approval process: Self Approval: Pooled Positions Only

1. Self Approval: Johanna Masbad UserID: JJM2220



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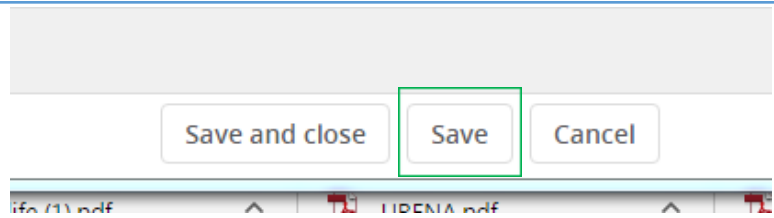
## COLUMBIA UNIVERSITY

### STEP 5.2

#### Save Offer details card.

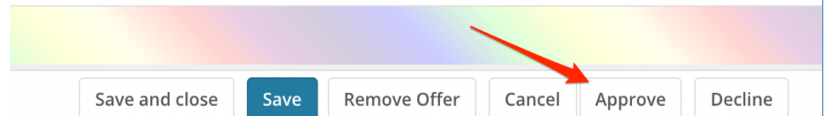
Click **Save**. Click **Okay**.

Now your offer card is complete and saved.



### STEP 5.3 Approve the offer card.

Scroll to the bottom of the offer card. You will see additional action buttons. Click **Approve**. Your offer card will close and is ready for sending.

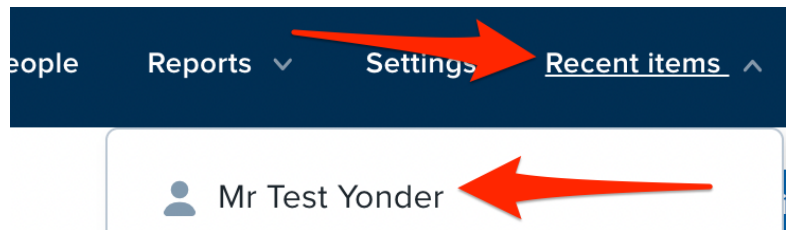


### STEP 6: Navigate back to the applicant card.

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.

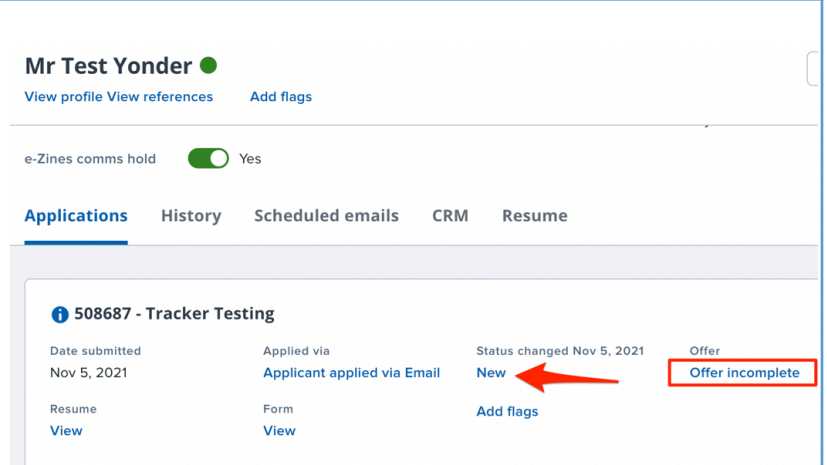


### STEP 7: Send the offer to the candidate.

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**.







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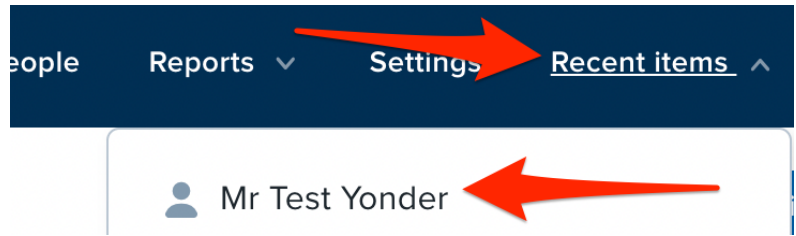
## COLUMBIA UNIVERSITY

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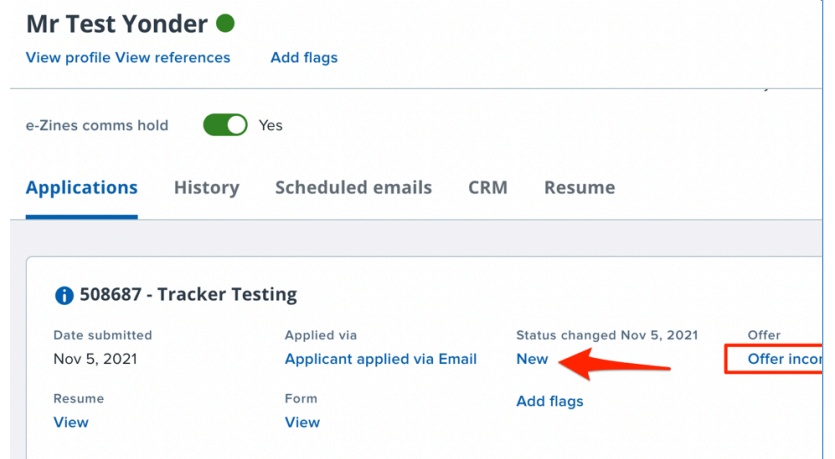


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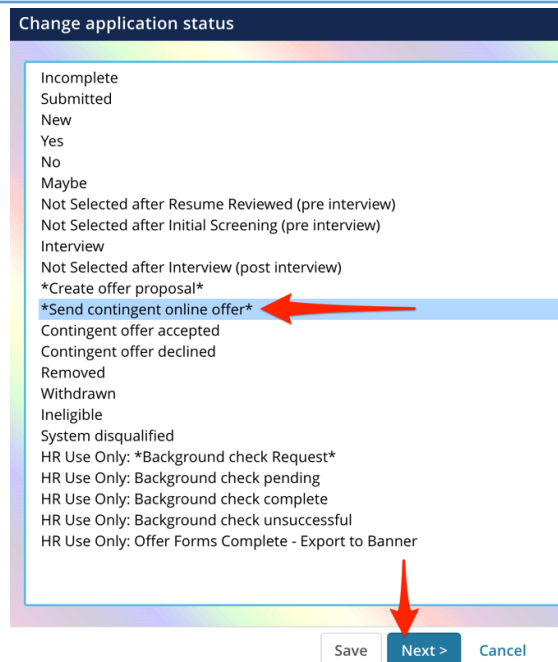
Under status, click **New**.



### 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 dependent on 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

Email: Applicant: ☒ Yes ☐ No

From:\*

Subject:\*

Message: Merge fields

**Teachers College**  
COLUMBIA UNIVERSITY

Dear Test,

We would like to formally welcome you to Teachers College, Columbia University in the position of Testing Employee. In order to view and accept your electronic offer letter, which outlines the terms and conditions of your employment, **please follow the steps below:**

1. Log into your [Applicant portal](#). If you have forgotten your password, please click on the 'Forgotten Password' link. A new password will be generated and sent to your email address.
2. Click on the "View offer" link.
3. After viewing your contingent offer indicate your online acceptance by clicking on the "I accept" button.
4. Once the offer has been accepted, you will be prompted to complete your Post Offer Form. You will not be able to move on to the next stage of the onboarding process until you have completed this step.

Should you require further information or have any queries, please do not hesitate to contact me.

Best,  
Manager Name  
Manager Title  
Manager@tc.columbia.edu  
Teachers College, Columbia University

**Move now** Cancel

### 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** First Name Last Name Middle Initial Suffix

Date submitted: Aug 25, 2020 Applied via: Employee Referral Status changed Aug 25, 2020 Offer: **\*Send contingent online o...** 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.