# Making an Offer - Full Time Professional Employees (Non - Exempt)

This guide covers the offer creation process for FT Non-Exempt Professionals on open ended or terminal appointment.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Select the candidate**<br>There are two ways you can locate the candidate. | Method 1  
![Test Working Title (500147)](image1)  
**Method 1 – Manage applications page.**<br>On the requisition, head to the Manage applications page. On the selected candidate’s record, click their name. |
| **Method 2 – Applicant progress board**<br>Navigate to the identified candidate’s bubble. Select anywhere in that bubble.**<br>In both methods, you will be taken to the selected person’s applicant card. | Method 2  
![Applicant Progress Board](image2)  
**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** for FT Professional Employees.

For 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 Section

For Non Exempt (employee submits a timesheet) positions, input the pay information as follows:

- 9 - enter the total appointment/salary 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 3.2

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 the 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**.

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**Onboarding**

<table>
<thead>
<tr>
<th>12. Onboarding form:*</th>
<th>Standard Post Offer</th>
</tr>
</thead>
<tbody>
<tr>
<td>13. Onboarding workflow:*</td>
<td>Full Time Employee</td>
</tr>
<tr>
<td>14. Primary Supervisor:*</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Bargaining Unit 2110</td>
</tr>
<tr>
<td></td>
<td>Bargaining Unit 32BJ</td>
</tr>
<tr>
<td></td>
<td>Bargaining Unit 767</td>
</tr>
<tr>
<td></td>
<td>Full Time Employee</td>
</tr>
<tr>
<td></td>
<td>Interns</td>
</tr>
<tr>
<td></td>
<td>Part Time Professional Employee</td>
</tr>
<tr>
<td></td>
<td>PT Instructional</td>
</tr>
<tr>
<td></td>
<td>Student</td>
</tr>
</tbody>
</table>

**Offer Progress**

**Do not change status**

- Offer accepted: [ ] Yes [ ] No
- Date offer accepted: 
- Offer declined: [ ] Yes [ ] No
- Date offer declined: 

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Please ensure you disable any pop up blockers or allow them for PageUp.
STEP 4.1
A Document merge box will pop up.

For permanent employees: Navigate to the Professional Staff folder.
- Select Offer Letter: FT Prof - Hourly
- Select Pay Rate Form: Non Exempt Professionals

For employees on terminal appointments: Navigate to the Professional Staff on Terminal Appointments folder.
- Select Offer Letter: FT Prof - Hourly (Term Appt)
- Select Pay Rate Form: Non Exempt Professionals

If hiring an employee on a terminal appointment, please note the different folder for offer documents.

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 as noted in all of steps 3. Click Back to fix the issue. If no changes are needed, click Ignore.

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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.

Click the save button at the bottom of the page to send the approval to your representative. Once approved, the HR team will send the electronic offer to the candidate.

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><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: 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>

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