Making an Offer - Interim Employee

This guide covers the offer creation process for employees in e-class 91.

<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>&lt;br&gt;There are two ways you can locate the candidate.</td>
<td><strong>Method 1</strong>&lt;br&gt;![Screen capture of Manage applications page] <strong>Method 2</strong>&lt;br&gt;![Screen capture of Applicant progress board]</td>
</tr>
<tr>
<td><strong>Method 1 – Manage applications page.</strong>&lt;br&gt;On the requisition, head to the Manage applications page. On the selected candidate’s record, click their name.</td>
<td><strong>Method 1</strong>&lt;br&gt;![Screen capture of Manage applications page] <strong>Method 2</strong>&lt;br&gt;![Screen capture of Applicant progress board]</td>
</tr>
<tr>
<td><strong>Method 2 – Applicant progress board</strong>&lt;br&gt;Navigate to the identified candidate’s bubble. Select anywhere in that bubble.**&lt;br&gt;In both methods, you will be taken to the selected person’s applicant card.</td>
<td><strong>Method 1</strong>&lt;br&gt;![Screen capture of Manage applications page] <strong>Method 2</strong>&lt;br&gt;![Screen capture of Applicant progress board]</td>
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**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.

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STEP 3. Complete the offer details card Position

In **Employee Type**, please choose **All Other Pooled Positions**.

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

Complete all mandatory fields.

**Note:** Mandatory fields are indicated with an **asterisk** *.
STEP 3.1: Salary Section

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 annualized salary or total appointment 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.

- Select Standard Post Offer
- For current employees, select Current Employees Post Offer

For 13. Onboarding Workflow, select Interims

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 3.2 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.

**Do not change status**

<table>
<thead>
<tr>
<th>Offer accepted:</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date offer accepted:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer declined:</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Date offer declined:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

Navigate to the Interims folder.
- Select Offer Letter: Interim
- Select Pay Rate Notice: Interims

Once you have checked both of your applicable letters, click Merge.

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### 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**.

### 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 **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.**

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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.**
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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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.**

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 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>

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