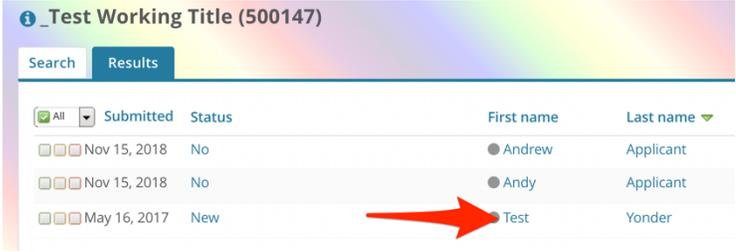
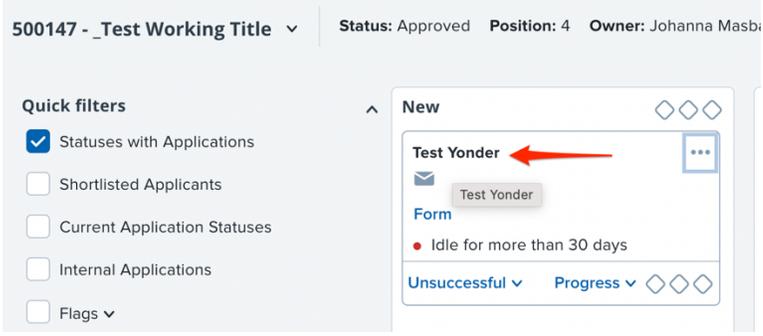




Making an Offer - One Time Payment

This guide is intended for use in completing the offer process for a first time employee's one time payment paid from account 6751. One Time Payments should only be paid through PageUp for non-employees; current employees should be paid OTP through an epaf. Refer to the [Additional Compensation or Job - Salaried](#) user guide for further details.

What you need to do	What you will see
<p>STEP 1: Select the candidate There are two ways you can locate the candidate.</p> <p>Method 1 – Manage applications page.</p> <p>On the requisition, head to the Manage applications page. On the selected candidate's record, click their name.</p> <p>Method 2 – Applicant progress board</p> <p>Navigate to the identified candidate's bubble. Select anywhere in that bubble.**</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 this link for instructions.</i></p>	<p>Method 1</p>  <p>Method 2</p> <p>Applicant Progress Board</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 Modify

e-Zines comms hold Yes

Applications History Scheduled emails CRM Resume

500147 - _Test Working Title

Date submitted	Applied via	Status changed Feb 20, 2020	Offer
May 16, 2017	none	New	No offer
Resume	Form	Add flags	
View	View		

STEP 3. Complete the offer details card.

In **Employee Type**, please choose **All Other Pooled Positions** for one time payments.

For 3- Tentative End date:

- Input the tentative end date. Typically this should not be more than 3 days after the start date.

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

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:*



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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 one time payment amount in annual salary/appointment amount field
- 10 - enter "0" in the hourly rate
- 11 - enter "0" in the overtime rates

Please note: do not enter a dollar sign, as it will error out these fields.*

Designated Pay Day:

Approved Range:

Pay Scale No. PN - TEMP
Minimum \$ 15.00
Maximum \$ 76,846.00

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.

STEP 3.2

One notable mandatory field is the **Onboarding workflow.**

Go to **12 - Onboarding form.**

- For brand new hires, select **Standard Post Offer Form**
- For current employees, select **Current Employees Post Offer Form**

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).

ONBOARDING

12. Onboarding form:*

13. Onboarding workflow:*

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 3.2 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.

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.

Click **Merge document.**

A pop up box will ask you to save the offer card. Click **Ok.**

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.

Navigate to the **One Time Payments (New Hires Only)** folder.

- Select **Offer Letter: One Time Payment**
- Select **Pay Rate Notice: OTP (New Hires Only)**

Please note: OTP should only be paid through Pageup for **new hires.** Current employees should receive OTP via **ePAF.**

After your selection, Click **Merge.**

One Time Payments (New Hires Only)

<input checked="" type="checkbox"/>	Offer Letter: One Time Payment	Nov 29, 2022
<input checked="" type="checkbox"/>	Pay Rate Notice: OTP (New Hires Only)	Apr 11, 2018

Merge Cancel



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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 from **step 3**. Click **Back** to fix the issue. If no changes are needed, click **Ignore**.

Document merge

Some applicant merge information is missing, which may result in the document containing errors.

Below is a list of the missing merge fields. Merge fields marked with an asterisk (*) must be updated manually. To manually correct errors in a new window click here.

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

Buttons: Retry, Ignore, Back, Cancel

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.

Offer documents

Click on Merge document button to select the appropriate documents. Each offer must have an offer letter and the Notice of Pay

Buttons: Add document, Merge document

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:

To select the approval process click the drop down menu. Select **Self Approval: Pooled Positions Only**.

Approval process

Originator:* Johanna Masbad
UserID: JJM2220

Approval process: [None] (dropdown menu open showing 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.

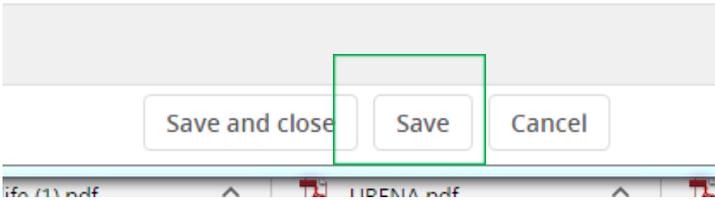
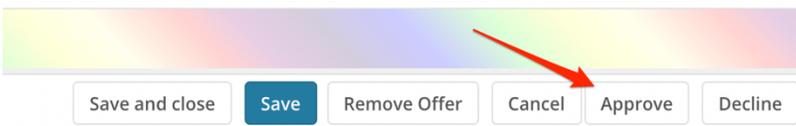
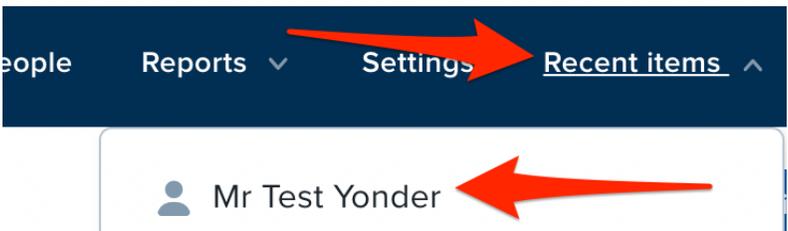
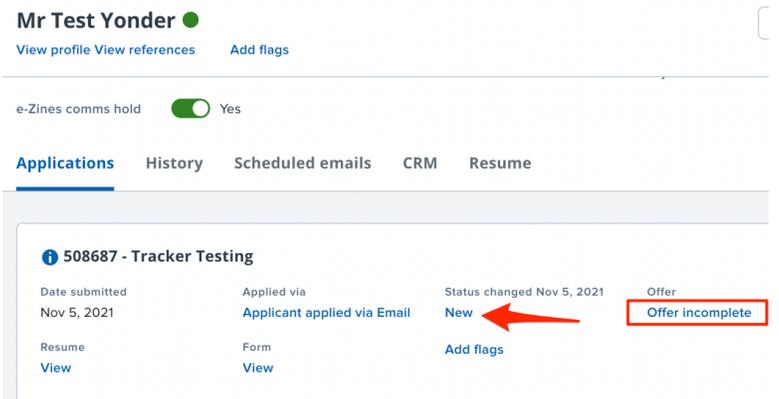
Approval process

Originator:* Johanna Masbad
UserID: JJM2220

Approval process: Self Approval: Pooled Positions Only

1. Self Approval: Johanna Masbad (selected)
UserID: JJM2220



<p>STEP 5.2 Save Offer details card. Click Save. Click Okay.</p> <p>Now your offer card is complete and saved.</p>	
<p>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.</p>	
<p>STEP 6: Navigate back to the applicant card. In the top menu bar, click Recent items.</p> <p>From the drop down menu, you should see the name of your candidate.</p> <p>Click on the applicant's name and you will open the applicant card.</p>	
<p>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.)</p> <p>Under status, click New.</p>	



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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 depending on the recruitment process.**

Change application status

- Incomplete
- Submitted
- New
- Yes
- No
- Maybe
- Not Selected after Resume Reviewed (pre interview)
- Not Selected after Initial Screening (pre interview)
- Interview
- Not Selected after Interview (post interview)
- *Create offer proposal*
- *Send contingent online offer***
- Contingent offer accepted
- Contingent offer declined
- Removed
- Withdrawn
- Ineligible
- System disqualified
- HR Use Only: *Background check Request*
- HR Use Only: Background check pending
- HR Use Only: Background check complete
- HR Use Only: Background check unsuccessful
- HR Use Only: Offer Forms Complete - Export to Banner

Save Next > Cancel

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**

E-mail: Applicant: Yes No

From:*

Subject:*

Message:

Format selection B I Tools

TEACHERS COLLEGE
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Dear mike,

We would like to formally welcome you to Teachers College, Columbia University in the p ADMIN 02072017.

In order to view your employment contract, which outlines the terms and conditions of yo follow the steps below:

1. Log into your [Applicant portal](#). If you have forgotten your password, please click on the Password link. A new password will be generated and sent to your email address.
2. Click on the 'View offer' link to view your employment contract.
3. After viewing your employment contract indicate your online acceptance by clicking on
4. Once you indicate your online acceptance, you will be prompted to complete an online

Should you require further information or have any queries, please do not hesitate to cont:

Kind Regards,

Harry Hire
Teachers College, Columbia University

harry@test.com

Delay e-mail by:*

Move now Cancel Spell check



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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 View Profile Information | View Offer History | Add Comments | Add Notes

Date submitted
Aug 25, 2020

Applied via
Employee Referral

Status changed Aug 25, 2020
***Send contingent online o...**

Offer
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: Offer Forms Complete	Candidate completed offer forms and will be processed.