Making an Offer - RA/TA/CA & PT Professional Students

This guide covers the offer creation process for employees in e-classes/accounts: 84/6462, 86/6531, 87/6422, and 45/6432.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Select the candidate**  
There are two ways you can locate the candidate.  
Method 1 – Manage applications page. 
On the requisition, head to the View Applications page. On the selected candidate’s record, click their name.  
Method 2 – Applicant progress board 
Navigate to the identified candidate’s bubble. Select anywhere in that bubble.**  
In both methods, you will be taken to the selected person’s applicant card.  
**For this feature to work, you must have enabled pop-ups in your browser. For Google Chrome, you can follow this link for instructions.** | **Method 1**  
[Test Working Title (500147)](http://example.com)  
| Method 2  
[Applicant Progress Board](http://example.com) |
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.

Complete all necessary fields for your offer.

In **Employee Type**, please choose **Student**.

**Tentative End date:** Enter the date the position ends (usually the end of each semester.)

*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.

**STEP 3.1: Salary**

The Annual salary, Hourly pay rate, and overtime rates must be filled in regardless of the status of the position.

Enter the employee’s full appointment amount in the **Annual Salary / Appointment Amount** box.

Please type in a 0 for the hourly and overtime rates.

*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:

- Term
- Semester Year
- Start Date of Appointment
- End Date of Appointment

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

**NOTE:** If these fields are not entered for RA, TA, CA & PT Professional Student roles, the offer letter will be incomplete (which is a compliance violation) and will be declined by the approver.

### Onboarding Form: Select Student Post Offer

One notable mandatory field is the **Onboarding workflow.** For RA/TA/CA and PT Professional Student hires, select **Student.**

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

*(Background checks are not applicable to student roles, however, if the incorrect Onboarding workflow is chosen it can unnecessarily delay their onboarding process).*

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<table>
<thead>
<tr>
<th>Term:</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semester Year:</td>
<td>Enter 4 digit year (ex. 2016)</td>
</tr>
<tr>
<td>Semester Start Date:</td>
<td></td>
</tr>
<tr>
<td>Semester End Date:</td>
<td></td>
</tr>
<tr>
<td>Start Date of Appointment:</td>
<td></td>
</tr>
<tr>
<td>End Date of Appointment:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Onboarding Workflow:</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
<tr>
<td>Bargaining Unit 2110</td>
</tr>
<tr>
<td>Bargaining Unit 328j</td>
</tr>
<tr>
<td>Bargaining Unit 707</td>
</tr>
<tr>
<td>Full Time Employee</td>
</tr>
<tr>
<td>Interims</td>
</tr>
<tr>
<td>Part Time Professional Employee</td>
</tr>
<tr>
<td>PT Instructional</td>
</tr>
</tbody>
</table>

**Student**
**Step 3.3 Note:**

Note: You will see just below the Onboarding 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 (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 Students folder.

For RA/TA/CA Employees:
- Select Offer Letter: Student - Research Assistant/Teaching Assistant/Course Assistant
- Select Pay Rate Notice: RA/TA/CA

For PT Professional Students:
- Select Offer Letter: PT Professional Student
- Select Pay Rate Notice: PT Professional Student

You must select both applicable files and 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.

**STEP 4.3**
You will be taken back to the Offer Details card where you will find the newly merged offer documents.

Always click View to download & review the offer documents. Remember these are legally binding documents.

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STEP 5
Select the approval process
From the drop down menu, select Student Employment

STEP 5.1
The approval line should stay with the default, Student Employment Team.

STEP 5.2
Save Offer details card.
Click Save. Click Okay.

Now your offer card is complete and saved. The Student Employment team will review the offer details and respond to the offer.

However the Student Employment team responds, you will receive an email update.

If the offer is approved, **no further action is required on your part**.

The Student Employment team will send the offer to the candidate for electronic response.

If it is declined, proceed to **Step 6**.
Step 6 Review reason offer was declined.

If you received notice that your offer letter was declined, navigate to the Applicant Card. Click the History tab.

Scroll down until you see a note from the Student Employment Team. This will state the reason it is declined and what needs to be fixed.

Step 6.1 Correct the offer card

To correct the error, return to the offer card by clicking Offer Incomplete (same location as the “No Offer” in step 2).

Scroll down to the Approval process section and click the Restart button to unlock the offer card. Make any changes requested by the approvers.

You will be required to delete the offer letter and pay rate notice, replacing them with updated versions. Proceed to the next step for specific instructions.
Step 6.2 Recreate offer documents and resubmit for approval.

Go to the Offer documents section. Remove the old offer letter & pay rate notice by clicking Delete.

Repeat Step 4 to create new offer documents and Step 5 to send through the approval workflow again.

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 nor completed post offer forms</td>
</tr>
<tr>
<td>Offer accepted</td>
<td>Candidate accepted offer, but needs to complete forms.</td>
</tr>
<tr>
<td>HR USE ONLY: Offer Forms Complete</td>
<td>Candidate completed offer forms and will be processed</td>
</tr>
</tbody>
</table>

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