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

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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.
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:

- 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.

**STEP 3.3**
**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).*

**ONBOARDING**

<table>
<thead>
<tr>
<th>12. Onboarding form:*</th>
<th>Student Post Offer</th>
</tr>
</thead>
<tbody>
<tr>
<td>13. Onboarding workflow:*</td>
<td></td>
</tr>
<tr>
<td>None</td>
<td></td>
</tr>
<tr>
<td>Bargaining Unit 2110</td>
<td></td>
</tr>
<tr>
<td>Bargaining Unit 328J</td>
<td></td>
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<tr>
<td>Bargaining Unit 707</td>
<td></td>
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<tr>
<td>Full Time Employee</td>
<td></td>
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<tr>
<td>Interims</td>
<td></td>
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<tr>
<td>Part Time Professional Employee</td>
<td></td>
</tr>
<tr>
<td>PT Instructional</td>
<td></td>
</tr>
</tbody>
</table>

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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.
### 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, skip to Step 7.

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.

**STEP 7:** Navigate back to the applicant card.
Once the offer is approved by the Student Employment Team, the hiring manager will receive an email notification indicating this.

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 7.1:** 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 7.2: 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.

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.

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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.

<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 offer forms.</td>
</tr>
<tr>
<td>HR USE ONLY: Offer Forms Complete</td>
<td>Candidate completed offer forms and will be offered.</td>
</tr>
</tbody>
</table>

- **506524**
  - 506524
  - Date submitted: Aug 25, 2020
  - Applied via: Employee Referral
  - Status changed Aug 25, 2020
  - Offer: *Send contingent online offer*
  - Offer incomplete

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