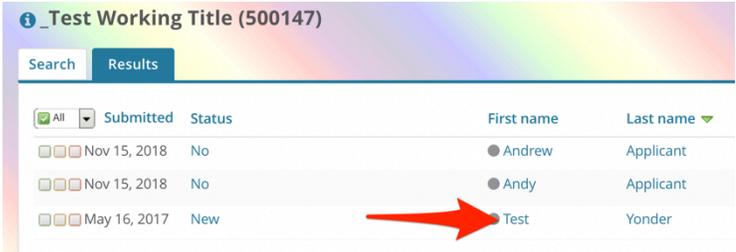
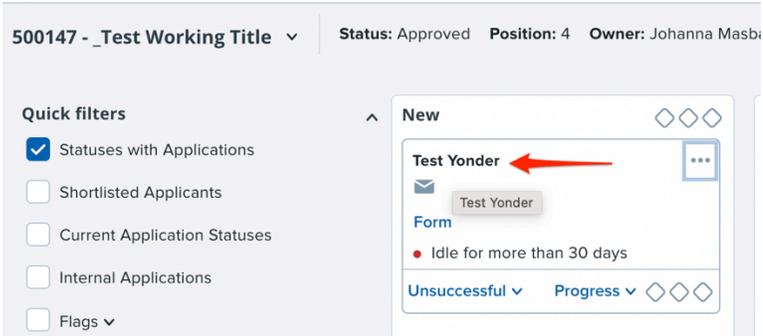
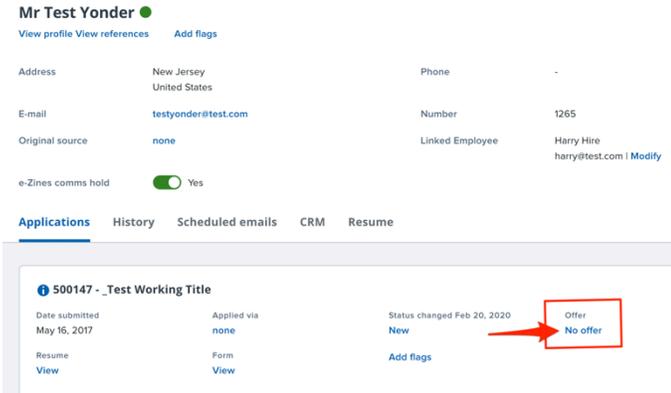


Making an Offer - Temporary Professional (Non-Exempt)

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. 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 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>**For this feature to work, you must have enabled pop-ups in your browser. For Google Chrome, you can follow this link for instructions.</p>	<p>Method 1</p>  <p>Method 2</p> <p>Applicant Progress Board</p> 
<p>STEP 2: Go to the offer card. From the applicant card, find the appropriate requisition. <i>(Please note: Applicants may have applied to multiple jobs. All will appear on this listing.)</i></p> <p>In the offer section, click No offer. You will be taken to the offer card.</p>	



STEP 3. Complete the offer details card Position

In **Employee Type**, please choose **PT Professional**.

For 3- Tentative End date: Input the tentative end date.

Note: Mandatory fields are indicated with an **asterisk ***.

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:*

Supervising Department:

4. Hours per week:*

5. Room Number:*

6. Building:*

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.

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 total appointment amount.
- **Hourly Pay Rate:** Enter the hourly rate
- **Overtime Rate:** This should be 1.5x the hourly rate

Designated Pay Day:

Approved Range:

9. Annual salary/ Appointment amount:*

10. Hourly Pay Rate:*

11. Overtime Rate:*

Pay Scale No. PN - NEXEM
Minimum \$ 3,000.00
Maximum \$ 51,188.00

* 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.

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**

One notable mandatory field is the **Onboarding workflow.** Please ensure you select the correct onboarding workflow as this affects the background check process. *Temporary Professionals should*

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



select the **PT Professional Employee workflow**.

(If the **incorrect Onboarding workflow** is chosen it can unnecessarily delay their 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.

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** (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).

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 folder of the applicable employee group. Select an **Offer Letter** and a **Pay Rate Form** based on the employee type.

Navigate to the **Professional Staff on Terminal Appointments** folder.

- Select **Offer Letter: Temporary Professionals (Non-Exempt)**
- Select the **Pay Rate: Non Exempt Professionals**

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

Professional Staff on Terminal Appointments

Offer Letter: FT Prof - Hourly (Term Appt)

Offer Letter: FT Prof - Salaried (Term Appt)

Offer Letter: PT Prof - Hourly (Term Appt)

Offer Letter: Temporary Professionals

Pay Rate: Non Exempt Professionals (Mandatory)

Pay Rate Form: Exempt Professionals (Mandatory)



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**.

The screenshot shows a 'Document merge' dialog box. At the top, it states: 'Some applicant merge information is missing, which may result in the document containing errors.' Below this, it says: '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.' The dialog is divided into two sections: 'Document' and 'Missing merge information'. Under 'Document', it lists 'Pay Rate Notice: College Work Study (Mandatory)'. Under 'Missing merge information', it lists 'APPLICANTSTREET*'. There are radio buttons for 'Retry' and 'Ignore', with 'Ignore' selected. At the bottom, there are 'Back' and 'Cancel' buttons.

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.*

The screenshot shows the 'Offer documents' section. It has a header 'Offer documents' and a blue instruction bar: 'Click on Merge document button to select the appropriate documents. Each offer must have an offer letter and the Notice of Pay'. Below this are two buttons: 'Add document' and 'Merge document'. A table lists documents with columns for Document, Date, Size, Category, and actions (View, Delete). The table contains two rows: 'Pay Rate Form: Adjunct (Mandatory)' and 'Offer Letter: Adjunct Professor'. Below the table is a 'Document library' section with columns for Name, Date, and Size.

STEP 5: Select the approval process

From the drop down menu, select **HR Team**

The screenshot shows the 'Approval process' form. It has a header 'Approval process'. The 'Originator:*' field is set to 'Cody Rassi' with a search icon and a dropdown menu showing 'UserID: CR3303'. The 'Approval process:' dropdown menu is open, showing options: 'HR Team', 'None', and 'HR Team' (which is selected). Below this is a section for '1. HR Team:' with a search field and a dropdown menu showing 'No user selected'.

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](#).

To track the candidate's status from this point, see the additional notes below.

This screenshot is identical to the previous one, but the search field in the '1. HR Team:' section is highlighted with a red box. The text 'Your Assigned Rep's Name Here' is written inside the search field.

STEP 5.2

Save Offer details card. Click **Save**. Click **Okay**.

Now your offer card is complete and saved.

The screenshot shows the bottom of the form with three buttons: 'Save and close', 'Save', and 'Cancel'. Below the buttons, a file explorer bar shows 'ifa (1).pdf' and 'LIBENA.pdf'.



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.

STEP 6: 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
...

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: Background check pending	None. Background check in progress.
HR USE ONLY: Background check complete	None. Offer process is complete and candidate will be processed.
HR USE ONLY: Offer Forms Complete	None. Candidate completed offer forms.