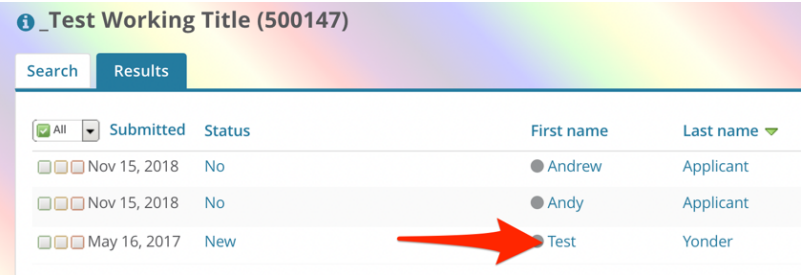
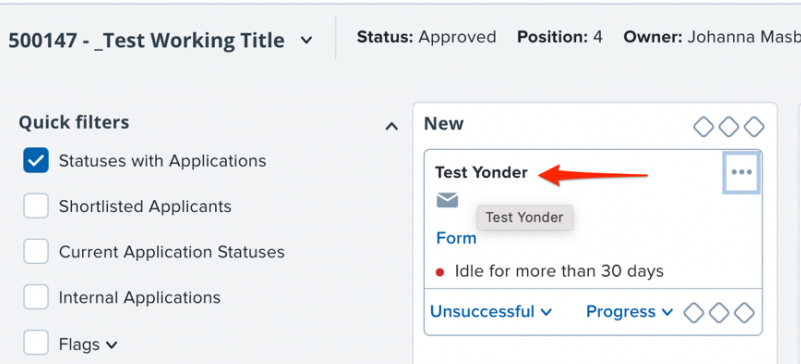
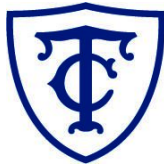


## Making an Offer - Federal Work Study

This guide covers the offer creation process for employees in e-class 90.

| What you need to do  | What you will see  |
|--|--|
| <p><b>STEP 1: Select the candidate</b><br/>There are two ways you can locate the candidate.</p> <p><b>Method 1 – Manage applications page.</b></p> <p>On the requisition, head to the <b>Manage applications</b> page. On the selected candidate’s record, click their name.</p> <p><b>Method 2 – Applicant progress board</b></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 <a href="#">this link</a> for instructions.</i></p> | <p><b>Method 1</b></p>  <p><b>Method 2</b></p> <p><b>Applicant Progress Board</b></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<br>United States             | Phone           | -                                     |
| E-mail             | testyonder@test.com                     | Number          | 1265                                  |
| Original source    | none                                    | Linked Employee | Harry Hire<br>harry@test.com   Modify |
| e-Zines comms hold | <input checked="" type="checkbox"/> Yes |                 |                                       |

**Applications** History Scheduled emails CRM Resume

**500147 - \_Test Working Title**

|                |             |                             |                 |
|----------------|-------------|-----------------------------|-----------------|
| Date submitted | Applied via | Status changed Feb 20, 2020 | <b>Offer</b>    |
| May 16, 2017   | none        | New                         | <b>No offer</b> |
| Resume         | Form        | Add flags                   |                 |
| View           | View        |                             |                 |

### STEP 3. Complete the offer details card.

Complete all necessary fields for your offer. In **Employee Type**, please choose **Student**.

#### For 3- Tentative End date:

- For College Work Study roles, can only be appointed for one year at a time. The End Date should be **no later than the end of the corresponding federal aid year i.e June 30**. The federal aid year runs from July 1 to June 30 of the following year.

**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).

**POSITION DETAILS**

For student positions, fill out only those with numbers 1-14. Then select the Student Merge Document.

Employee Type:\* Student

1. UNI:

2. Tentative Start date:\* May 15, 2023

3. Tentative End date:\* Aug 31, 2023

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:\* 19

### STEP 3.1

In addition to all required fields (noted by the asterisks), you must also fill in the student's UNI. If left blank, your merged offer letter will not fill properly in **step 4**.

**POSITION DETAILS**

For student positions fill out only those with numbers 1-14. Then select the Student Merge Document.

Employee Type:\* Student Positions

1. UNI:

2. Tentative Start date:\* Nov 9, 2023

3. Tentative End date:\* Jan 24, 2024

For student appointments, please enter the last day of the semester or the last day worked.



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### STEP 3.2: 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 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.\*

Designated Pay Day:

Approved Range:

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.

FLSA status:

### STEP 3.3:

Go to **12 - Onboarding form.**

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

One notable mandatory field is the **13 - Onboarding workflow.** Select **Student** for work study positions.

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

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 3.3 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** (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**.

Offer documents

**Click on Merge document button to select the appropriate documents. Each the Notice of Pay**

Add document Merge document

### STEP 4.1

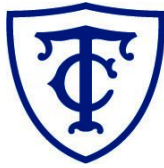
A **Document merge** box will pop up. Navigate to the *Students* folder. Select **Offer Letter: College Work Study** and **Pay Rate Form: College Work Study**.

Click **Merge**.

Students

- Offer Letter: Doctoral Research Fellow
- Offer Letter: Admin Fellow
- Offer Letter: College Work Study
- Offer Letter: PT Professional Student
- Offer Letter: Student - Research Assistant/Teaching Assistant/Course Assistant
- Pay Rate Notice: Admin Fellows (Mandatory)
- Pay Rate Notice: RA/TA/CA (Mandatory)
- Pay Rate Notice: College Work Study (Mandatory)
- Pay Rate Form: Doctoral Research Fellow (Mandatory)
- Pay Rate Notice: PT Professional Student (Mandatory)

Merge Cancel



# Teachers College COLUMBIA UNIVERSITY

## 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. Review all parts of Steps 3 - 3.3. Click **Back** to fix the issue(s). 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*          |

Retry
  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 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

| 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

### Select the approval process

From the drop down menu, select **Student Employment**

**Approval process**

Originator:\*

No user selected

Approval process:

None  
Student Employment

## STEP 5.1

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

**Approval process**

Originator:\*

No user selected

Approval process:

1. Student Employment Team:

UserID:



# Teachers College

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### STEP 5.2

#### Save Offer details card.

Click **Save**. Click **Okay**.

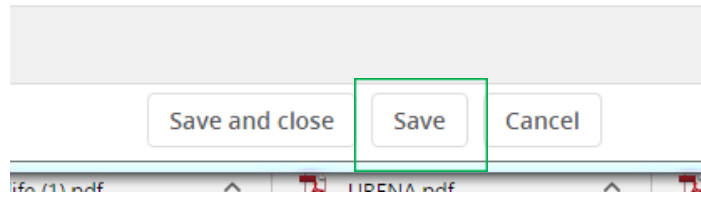
Now your offer card is complete and saved. The Student Employment team will review the offer details and respond to the offer.

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.

[Applications](#) **History** [Scheduled emails](#) [CRM](#) [Resume](#)

| Job | Item |
|-----|------|
| All | All  |

**Note**  
Today, 9:34am  
Student Employment Team  
Training Test (510775)  
If an offer is declined, a message will be left here to explain why.



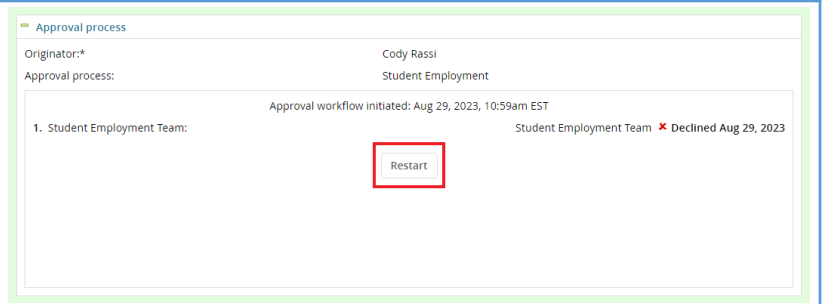
# Teachers College COLUMBIA UNIVERSITY

## 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.

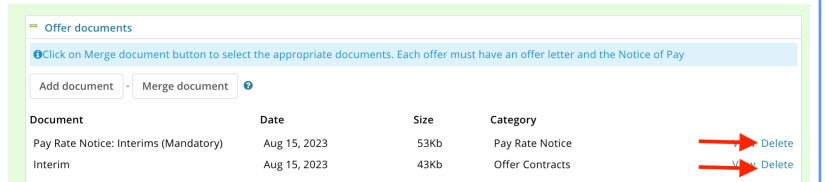
You will be required to delete the offer letter and pay rate notice, replacing them with updated versions. Proceed to the next step for specific instructions.



## Step 6.2 Recreate offer documents and resubmit for approval.

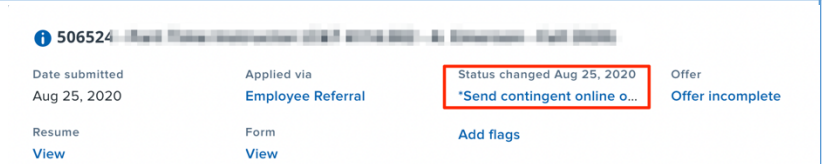
Go to the Offer documents section. Remove the old offer letter & pay rate notice by clicking Delete.

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.



| 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.                                       |