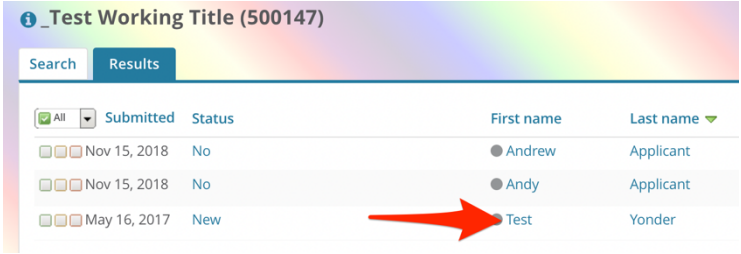
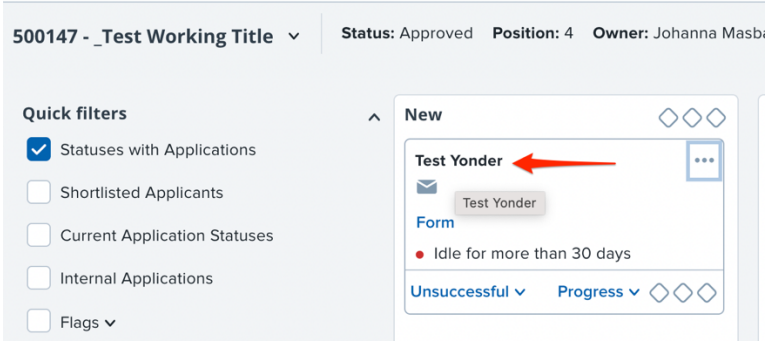




Making an Offer - Interim Employee

This guide covers the offer creation process for employees in e-class 91.

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 View	Form View	Add flags	

STEP 3. Complete the offer details card Position

In **Employee Type**, please choose **All Other Pooled Positions**.

For 3- Tentative End date:

- For open ended appointments, please input 8/31/2049
- For terminal appointments, input the tentative end date.

Complete all mandatory fields.

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:*

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:*

5. Room Number:*



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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 annualized salary or total 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:

Pay Scale No. PN - INTRM
Minimum \$ 88.00
Maximum \$ 25,070.00

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.

FLSA status:

STEP 3.2

Go to **12. Onboarding form.**

- Select **Standard Post Offer**
- For current employees, select **Current Employees Post Offer**

For **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:

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** (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 **Interims** folder.

- Select **Offer Letter: Interim**
- Select **Pay Rate Notice: Interims**

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

Interims

Offer Letter: Interim

Pay Rate Notice: Interims (Mandatory)

Merge

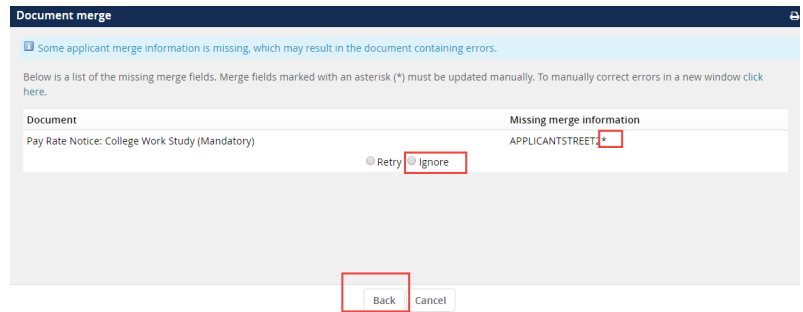
Cancel



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*.

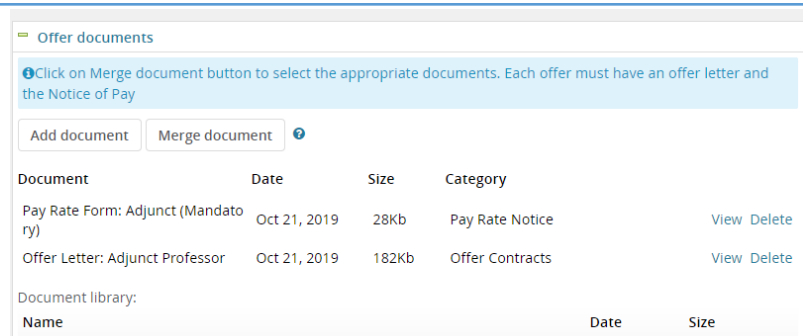
An asterisk designates any missing mandatory fields as noted in all of **steps 3**. Click **Back** to fix the issue. If no changes are needed, click **Ignore**.



STEP 4.3

You will be taken back to the *Offer Details* card and can find your newly merged offer documents in that section.

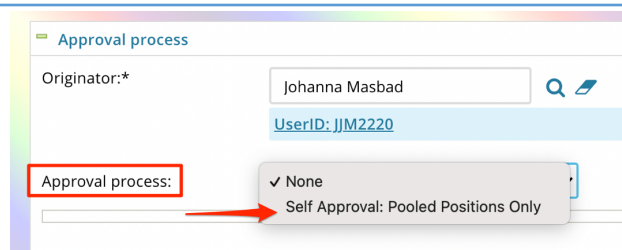
Always click **View** to download & review the offer documents. *Remember these are legally binding documents.*



STEP 5

Select the approval process

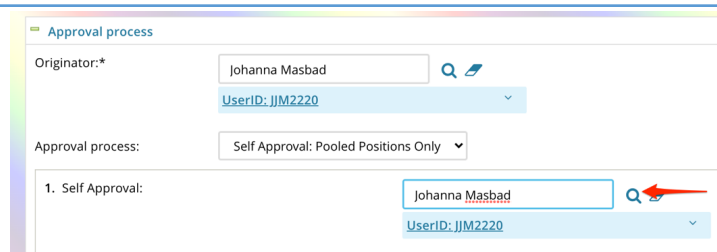
From the drop down menu, select **Self Approval: Pooled Positions Only**



STEP 5.1

In the approval line, select your name as the user.

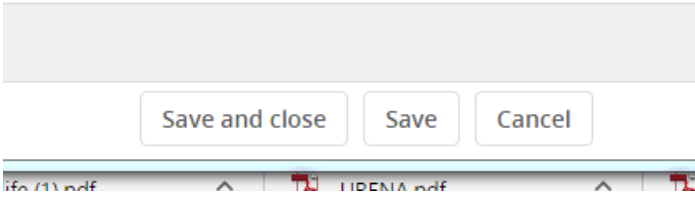
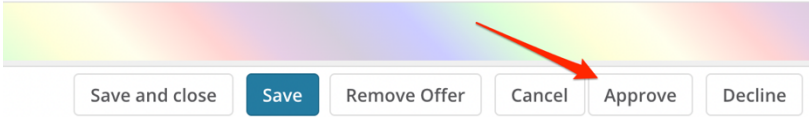
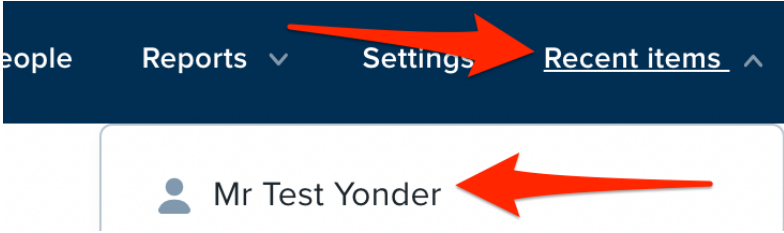
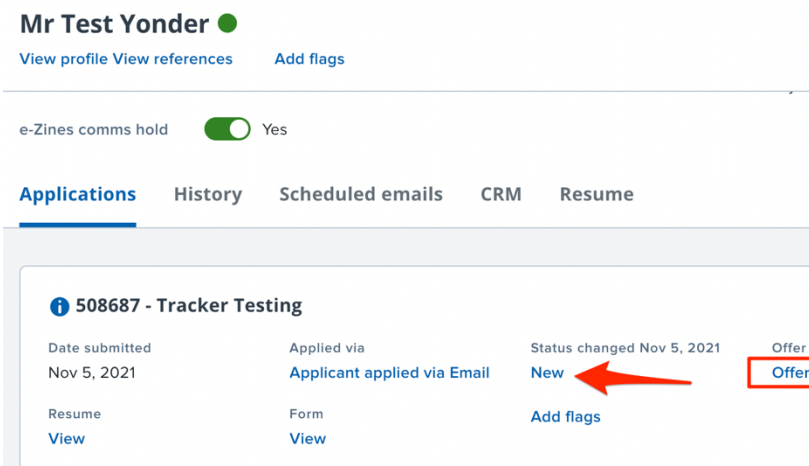
You can type in your name or use the magnifying glass.





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<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 dependent on 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
COLUMBIA UNIVERSITY

Dear mike,

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

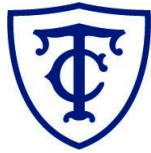
Kind Regards,

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 View History View Details

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.