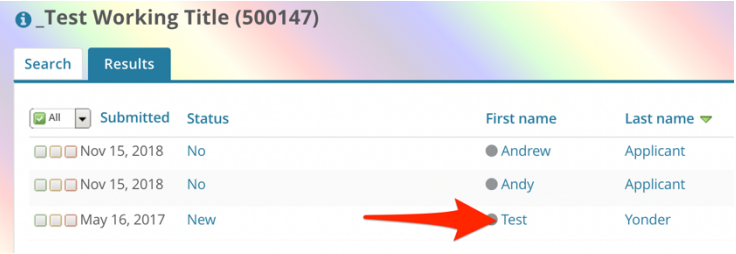
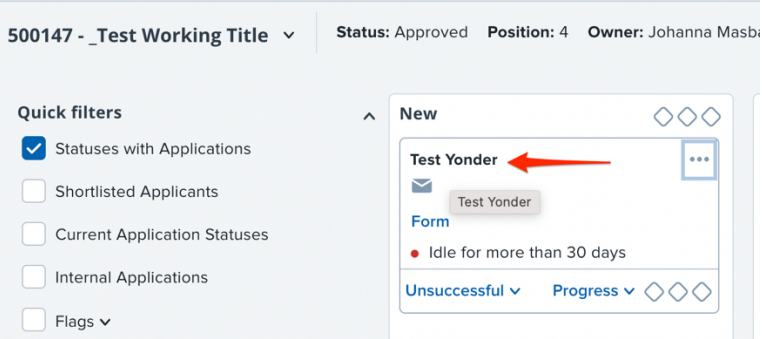


## Making an Offer - Union Positions

This guide is intended for use when creating offer letters for employees in e-classes 50, 51, 52, 70, 71, 78, and 72.

What you need to do	What you will see
<p><b>STEP 1: Select the candidate</b> 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> 



# Teachers College

## COLUMBIA UNIVERSITY

### 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   <a href="#">Modify</a>
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	<a href="#">Offer</a>
May 16, 2017	none	New	<a href="#">No offer</a>
<a href="#">Resume</a>	<a href="#">Form</a>	<a href="#">Add flags</a>	
<a href="#">View</a>	<a href="#">View</a>		

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

Complete all necessary fields for your offer.

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

#### For 3- Tentative End date:

- For open ended appointments, please input 8/31/2049
- For terminal appointments, 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:\*

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:\*



# Teachers College COLUMBIA UNIVERSITY

## STEP 3.1: 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 annual amount in annual salary
- 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. HR - CUST2  
Minimum \$ 48,954.00  
Maximum \$ 61,193.00

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

One notable mandatory field is the **Onboarding workflow**. Please ensure you select the correct onboarding workflow (**Bargaining Unit 2110, 32BJ, or 707**) as this affects the background check process. *Please select the workflow corresponding to the union this position will be part of.*

*(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.

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

### OFFER PROGRESS

**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:



# Teachers College

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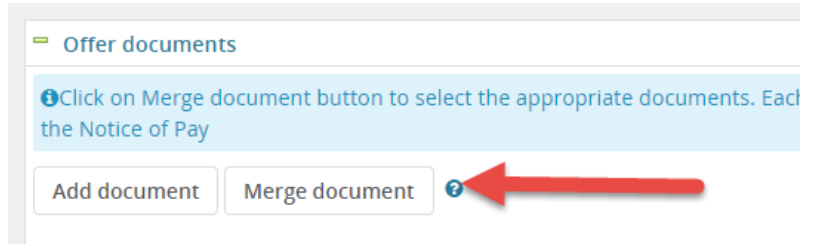
### STEP 4

#### 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**.

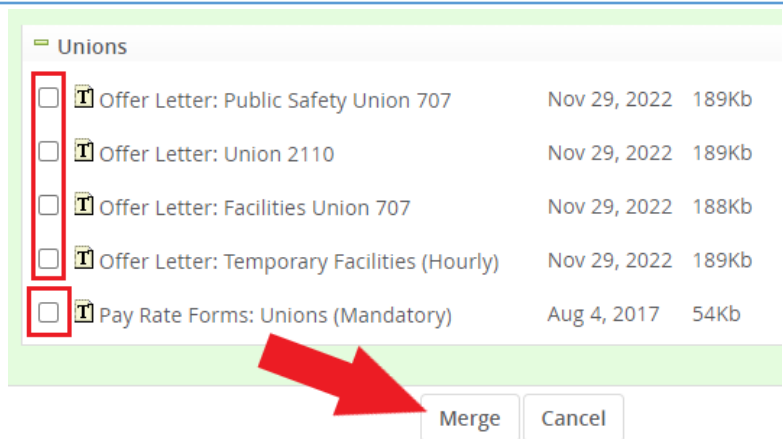
A pop up box will ask you to save the offer card. Click **Ok**. (Please ensure you disable any pop up blockers or allow them for PageUp).



### STEP 4.1

A **Document merge** box will pop up. Scroll down to the Unions folder and select an **Offer Letter** and a **Pay Rate Form** based on the union affiliation.

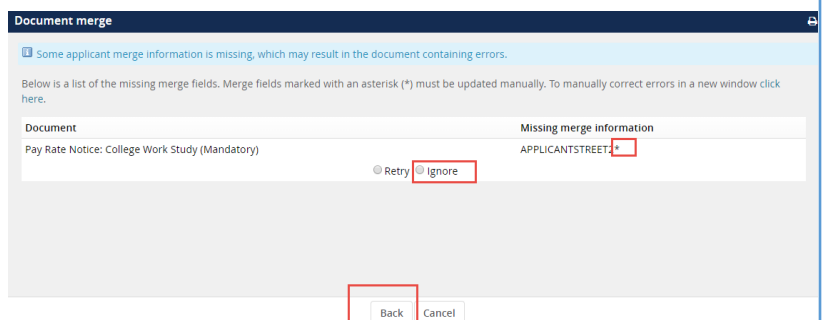
In the Unions folder, click the check box for the applicable Offer Letter and the box for the Pay Rate Forms, then click **Merge**.



### 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. 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.*

Offer documents

Click on Merge document button to select the appropriate documents. Each offer must have an offer letter and the Notice of Pay

Add document Merge document

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 **HR Team**

Approval process

Originator:\*

UserID: CR3303

Approval process:

None  
None  
HR Team

### 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](#).

Click the save button at the bottom of the page to send the approval to your representative. Once approved, the HR team will send the electronic offer to the candidate.

Approval process

Originator:\*

UserID: CR3303

Approval process:

1. HR Team:

### 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 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.