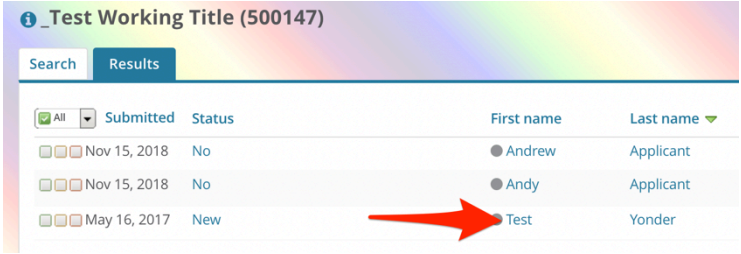
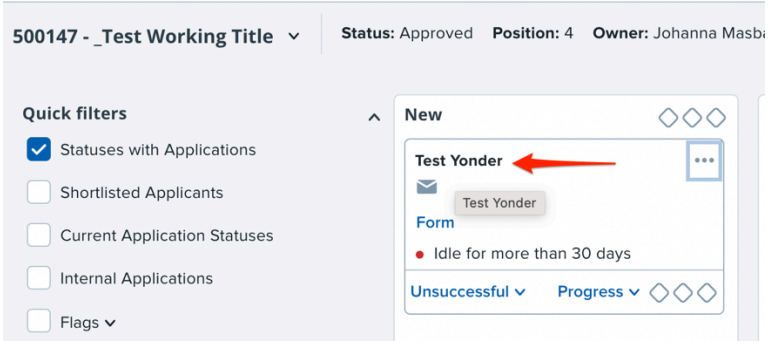


## Making an Offer - Admin Fellows & Course Assistants

This guide covers the offer creation process for employees in e-classes 84/account 6462 or 89/account 6412.

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> 



**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	<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:**  
 Input the tentative end date (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.

**POSITION DETAILS**

**For student positions, select 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

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. For Course Assistants this should be no greater than \$1215 (\$18/hour X 4.5hours/week X 15 weeks).
- 10 - Enter the hourly rate (at least \$18.00 / hour)
- 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.\*



### SALARY

Calculate the below fields by clicking [HERE](#). Then copy/paste values in applicable fields.

For PT Exempt positions, please input '0.00' for both the Hourly Pay Rate and Overtime Rate fields.

Please note: The Pay Rate Calculator will open in a separate tab. This may cause the Offer Details screen to be hidden behind calculator screen. Minimize calculator screen to view Offer Details.

Designated Pay Day:

Approved Range:   

Pay Scale No. PN - ADMNF  
Minimum \$ 3,375.00  
Maximum \$ 9,000.00

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.

### STEP 3.2

The fields listed below **must** be filled in order to generate your offer letter:

- Term
- 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 Admin Fellow/Course Assistant roles, the offer letter will be incomplete (which is a compliance violation) and will be declined by the approver.


Term:


Semester Year:

Enter 4 digit year (ex. 2016)

Semester Start Date:  

Semester End Date:  

Start Date of Appointment:  

End Date of Appointment:  



### STEP 3.3

Go to **12 - Onboarding form**.

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

For **13 - Onboarding Workflow**, 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).*

**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.

### ONBOARDING

12. Onboarding form:\*

Student Post Offer

13. Onboarding workflow:\*

None

14. Primary Supervisor:\*

None  
 Bargaining Unit 2110  
 Bargaining Unit 32BJ  
 Bargaining Unit 707  
 Full Time Employee  
 Interims  
 Part Time Professional Employee  
 PT Instructional  
**Student**

Onboarding Task List Proxy:

### 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 **Students** folder.

### For Admin Fellows:

- Select **Offer Letter: Admin Fellow**
- Select **Pay Rate Notice: Admin Fellow & Course Assistant**

### For Course Assistants:

- Select **Offer Letter: Course Assistant**
- Select **Pay Rate Notice: Admin Fellow & Course Assistant**

Click **Merge**.

Students

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

Merge Cancel

Students

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

**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
Offer Letter: Course Assistant	GENERIC_GENERICLIST14*

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 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	
Course Assistant Davis, Demario Offer	Jul 23, 2024	44Kb	Offer Contracts	View Delete
Pay Rate Notice: Admin Fellows/Course Assistant (Mandatory)	Jul 23, 2024	53Kb	Pay Rate Notice	View Delete

Document library:

Name	Date	Size
------	------	------

### STEP 5

#### Select the approval process

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

Approval process

Originator:\* Your Name No user selected

Approval process: None  
 None  
 Student Employment

### STEP 5.1

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

Approval process

Originator:\* Your Name No user selected

Approval process: Student Employment

1. Student Employment Team: Student Employment Team UserID:



## STEP 5.2

### Save Offer details card.

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

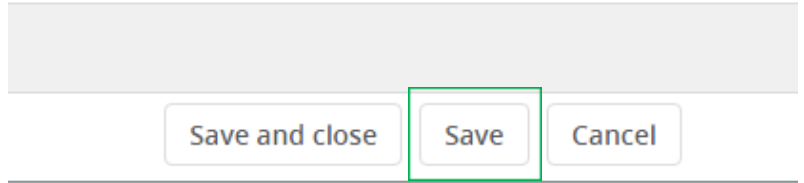
Now your offer card is complete and saved. The Student Employment team will review the offer details and respond to the offer.

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.

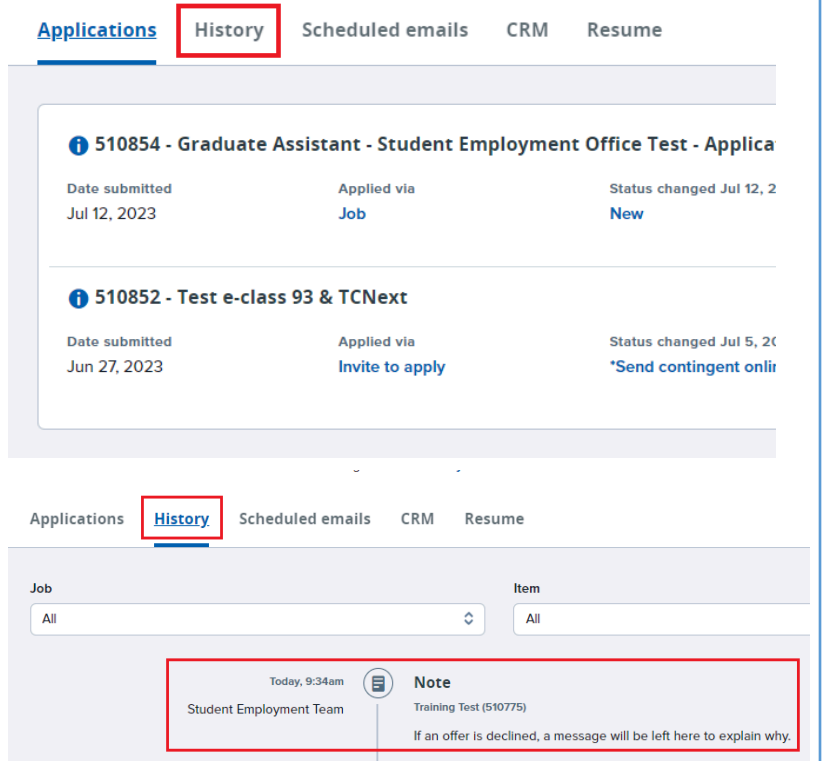
If it is declined, proceed to **Step 6**.



## 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.



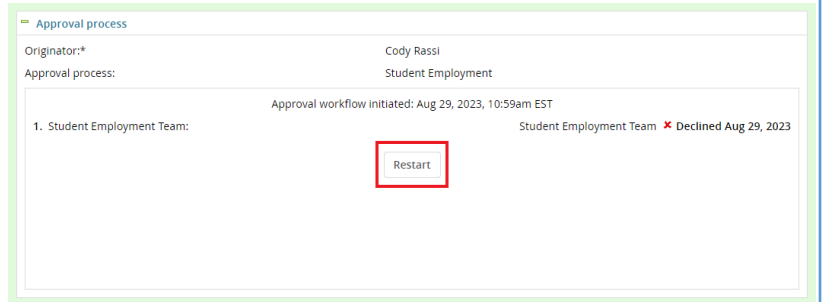


## Step 6.1 Correct the offer card

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.

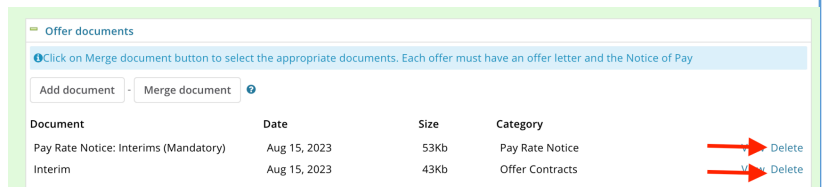
You will be required to delete the offer letter and pay rate notice, replacing them with updated versions. Proceed to the next step for specific instructions.



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

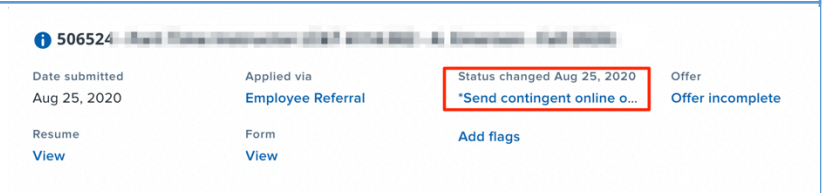
Go to the Offer documents section. Remove the old offer letter & pay rate notice by clicking Delete.

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.