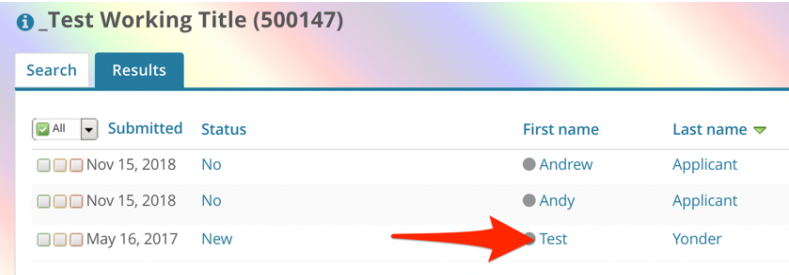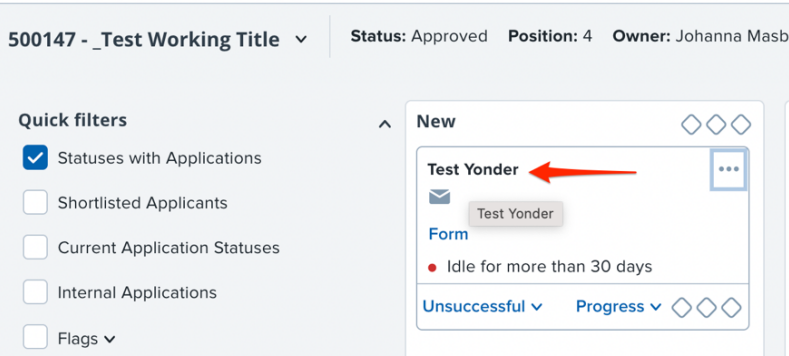# Teachers College
COLUMBIA UNIVERSITY

Making an Offer - Doctoral Research Fellow

This guide covers the offer creation process for Doctoral Research Fellow (eclass 88 / account 6442).

What you need to do	What you will see
STEP 1: Select the candidate There are two ways you can locate the candidate. **Method 1 – Manage applications page.** On the requisition, head to the **Manage applications** page. On the selected candidate's record, click their name. **Method 2 – Applicant progress board** Navigate to the identified candidate's bubble. Select anywhere in that bubble.** In both methods, you will be taken to the selected person's applicant card. ***For this feature to work, you must have enabled pop-ups in your browser. For Google Chrome, you can follow this link for instructions.*	**Method 1** **Method 2**

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 | Modif

e-Zines comms hold   ● Yes

Applications   History   Scheduled emails   CRM   Resume

ℹ 500147 - _Test Working Title

Date submitted	Applied via	Status changed Feb 20, 2020	Offer
May 16, 2017	none	New	No offer
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**.

Tentative End date: Enter the date the position ends as indicated on the award document.

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, put only those with numbers 1-14. Then select the Student Merge Document.

Employee Type:*   Student

1. UNI:

2. Tentative Start date:*   Aug 24, 2022

3. Tentative End date:*   May 31, 2023

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

For positions without end dates, please select 31 Aug 2049.

Supervising Department   Counseling and Clinical Psychology

4. Hours per week:*   20

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 full appointment amount
- 10 - enter "0" hourly rate
- 11 - enter "0"

Please note: do not enter a dollar sign, as it will error out these fields.*****

Designated Pay Day:	Semi-Monthly on 15th and last business day of month ▾
Approved Range:	Part Time Employees 🔍 ✏️
	Pay Scale No. PN - DOCRF Minimum $ 10,000.00 Maximum $ 30,000.00
9. Annual salary/ Appointment amount:*	20000

* 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 your VP and the Budget Office.

10. Hourly Pay Rate:*	0

Please input in format 00.00 without the dollar sign.

11. Overtime Rate:*	0

Please input in format 00.00 without the dollar sign.

STEP 3.2

The following fields are required to generate your offer letter (picture right):

- Academic Departments
- Length of Appointment
- Term
- Semester Year

If left blank, your letter will not fill properly in **step 4**.

NOTE: If these fields are not entered for DRF roles, the offer letter will be incomplete (which is a compliance violation) and will be declined by the approver.

Academic Departments:	Select ▾
Length Of Appointment:	Select ▾
Term:	Select ▾
Semester Year:	

Enter 4 digit year (ex. 2016)

STEP 3.3
Onboarding Form: choose
Student post Offer

One notable mandatory field is the **Onboarding workflow.** For DRF hires, 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
Onboarding Task List Proxy: Full Time Employee
                               Interims
                               Part Time Professional Employee
                               PT Instructional
                               Student

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
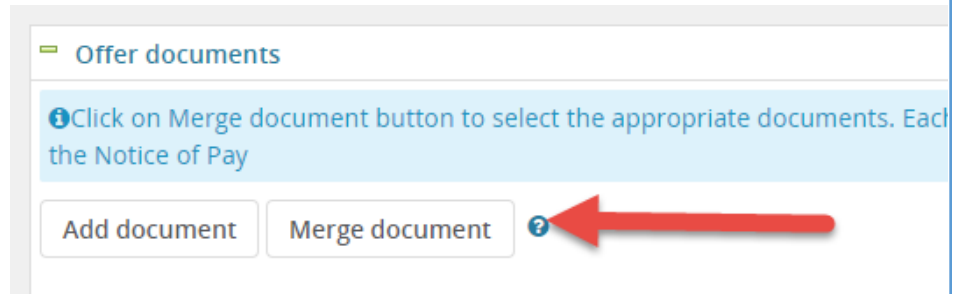Date offer declined: [_____] 📅

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. Scroll down to the **Students** folder.

- Select **Offer Letter: Doctoral Research Fellow**
- Select **Pay Rate Notice: Doctoral Research Fellow**

You must select **both** applicable files and 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)

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 from **steps 3 - 3.3**. 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
Pay Rate Notice: College Work Study (Mandatory)	APPLICANTSTREET2 *
○ Retry ○ Ignore	

Back   Cancel

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	Dele
Offer Letter: Adjunct Professor	Oct 21, 2019	182Kb	Offer Contracts	View	Dele

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**.

| | |
| Save and close | Save | Cancel |
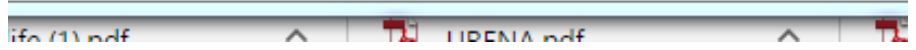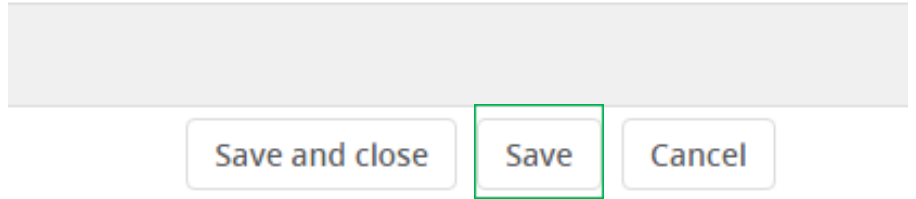
Step. 6 Review reason offer was declined.

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

ⓘ 510854 - Graduate Assistant - Student Employment Office Test - Applica

| Date submitted | Applied via | Status changed Jul 12, 2 |
| Jul 12, 2023 | Job | New |

ⓘ 510852 - Test e-class 93 & TCNext

| Date submitted | Applied via | Status changed Jul 5, 2(|
| Jun 27, 2023 | Invite to apply | *Send contingent onlir |

Applications   History   Scheduled emails   CRM   Resume

Job
All

Item
All

Today, 9:34am   📋   **Note**
Student Employment Team   Training Test (510775)

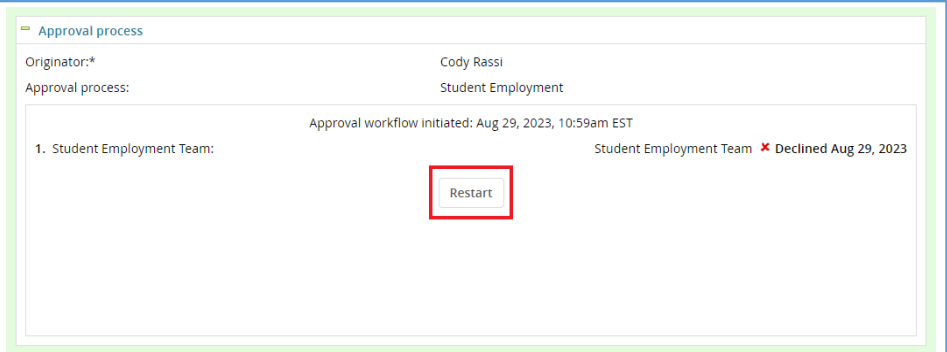If an offer is declined, a message will be left here to explain why.

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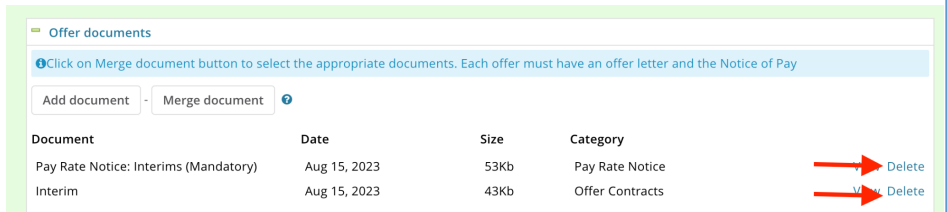
You will be required to delete the offer letter and pay rate notice, replacing them with updated versions. Proceed to the next step for specific instructions.

Approval process

| Originator:* | Cody Rassi |
| Approval process: | Student Employment |

Approval workflow initiated: Aug 29, 2023, 10:59am EST

1. Student Employment Team: Student Employment Team ✖ Declined Aug 29, 2023

Restart

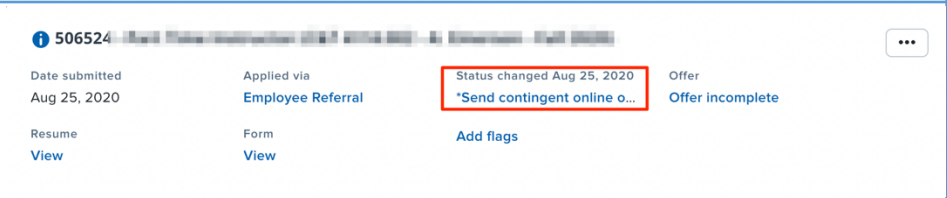## Step 6.2 Recreate offer documents and resubmit for approval.

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.

Offer documents

ℹ 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 Notice: Interims (Mandatory)	Aug 15, 2023	53Kb	Pay Rate Notice	Delete
Interim	Aug 15, 2023	43Kb	Offer Contracts	Delete

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.

ℹ 506524 ...

| Date submitted | Applied via | Status changed Aug 25, 2020 | Offer |
| Aug 25, 2020 | Employee Referral | *Send contingent online o... | Offer incomplete |

| Resume | Form | |
| View | 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: Offer Forms Complete	Candidate completed offer forms and will be processed.