Making an Offer - One Time Payment

This guide is intended for use in completing the offer process for a first time employee's one time payment paid from account 6751. One Time Payments should only be paid through PageUp for non-employees; current employees should be paid OTP through an epaf. Refer to the [Additional Compensation or Job - Salaried](#) user guide for further details.

<table>
<tr><th>What you need to do</th><th>What you will see</th></tr>
<tr><td>

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.*

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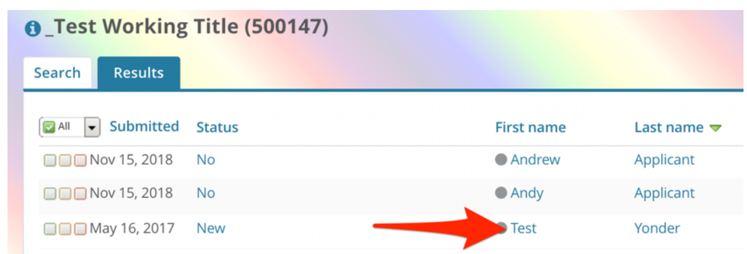
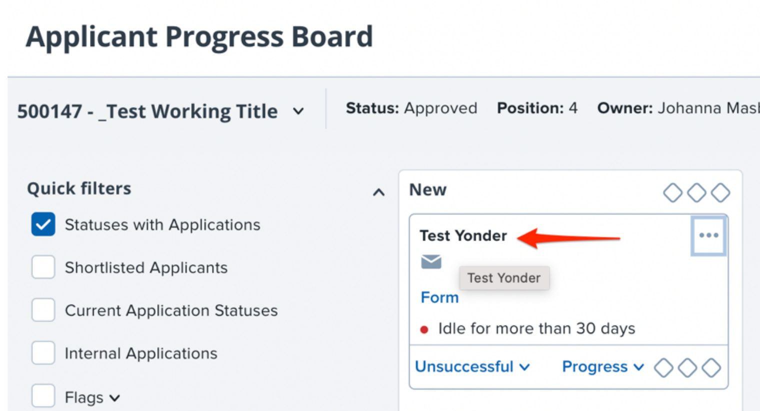
Method 1



Method 2



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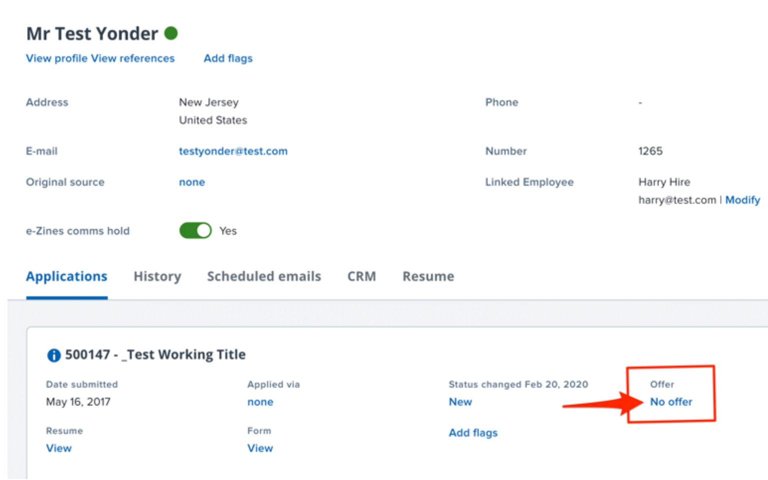
STEP 2: Go to the offer card.
From the applicant card, find the appropriate requisition. *(Please note: Applicants may have applied to multiple jobs. All will appear on this listing.)*

In the offer section, click **No offer.** You will be taken to the offer card.



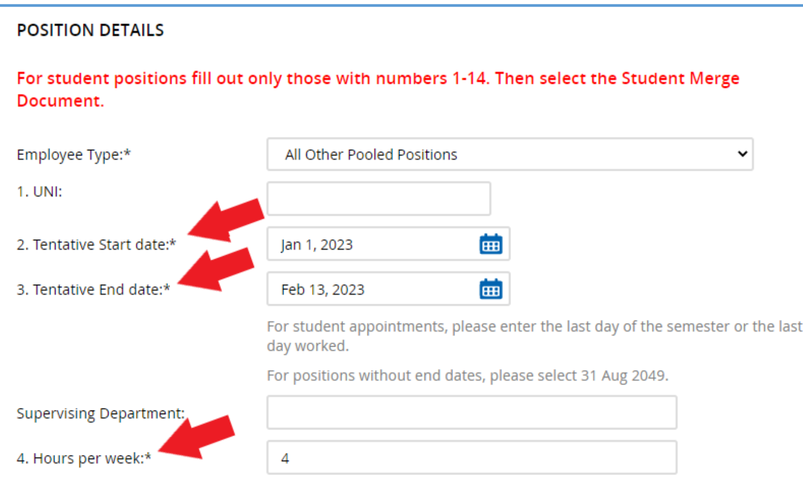
STEP 3. Complete the offer details card.

In **Employee Type**, please choose **All Other Pooled Positions** for one time payments.

For 3- Tentative End date:

- Input the tentative end date. Typically this should not be more than 3 days after the start date.

Complete the rest of the mandatory fields (indicated with an asterisk *) in the section.



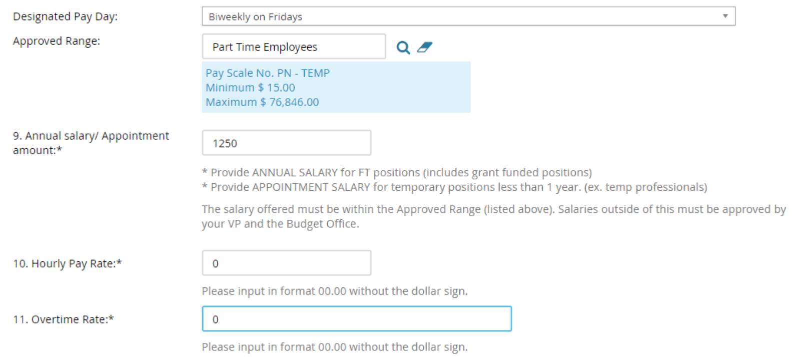
STEP 3.1: Salary

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 one time payment amount in annual salary/appointment amount field
- 10 - enter “0” in the hourly rate
- 11 - enter “0” in the overtime rates

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



STEP 3.2

One notable mandatory field is the **Onboarding workflow.**

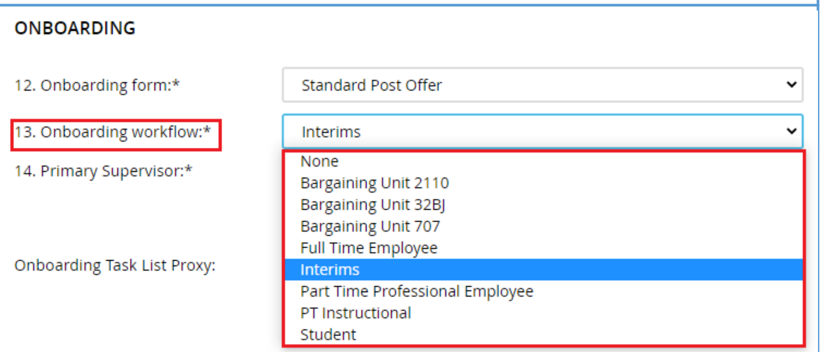
Go to **12 - Onboarding form.**

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

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*).



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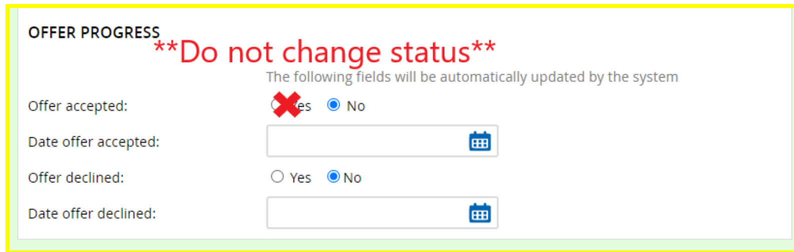
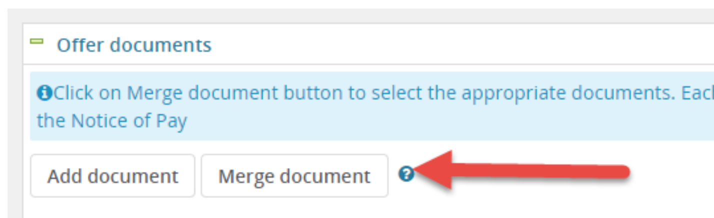
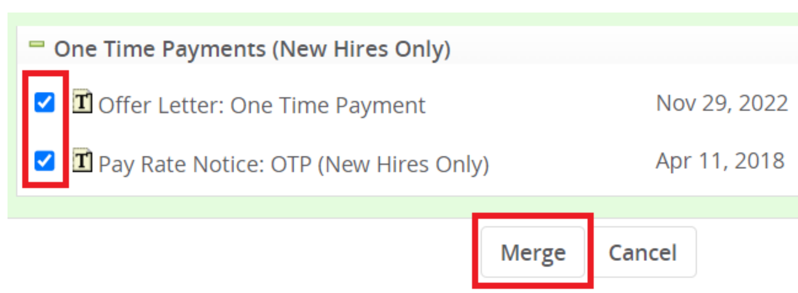
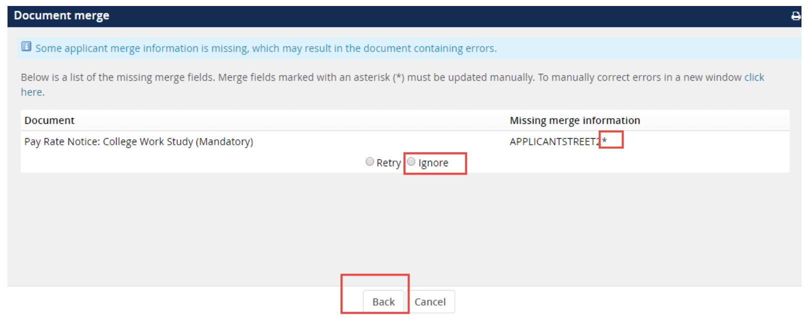
Step 3.2 Note: *Just below the Onboarding section you may see the Offer Accepted button. Even if you have received a verbal acceptance from your candidate* ***please do not click yes.*** *This will automatically change once your candidate completes their steps.*	
STEP 4 **Merge Offer Documents** Every offer must have an *Offer Letter* and a *Pay Rate Form*. Click **Merge document**. A pop up box will ask you to save the offer card. Click **Ok.**	
STEP 4.1 A **Document merge** box will pop up. Navigate to the **One Time Payments (New Hires Only)** folder. • Select **Offer Letter: One Time Payment** • Select **Pay Rate Notice: OTP** Please note: OTP should only be paid through Pageup for **new hires**. Current employees should receive OTP **via ePAF.** After your selection, 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*.

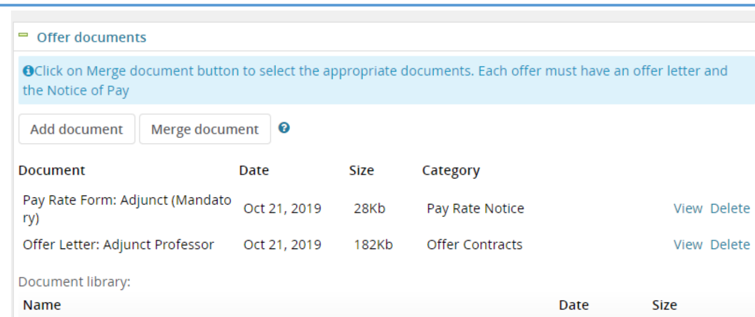
An asterisk designates any missing mandatory fields from **step 3**. Click **Back** to fix the issue. If no changes are needed, click **Ignore**.



STEP 4.3

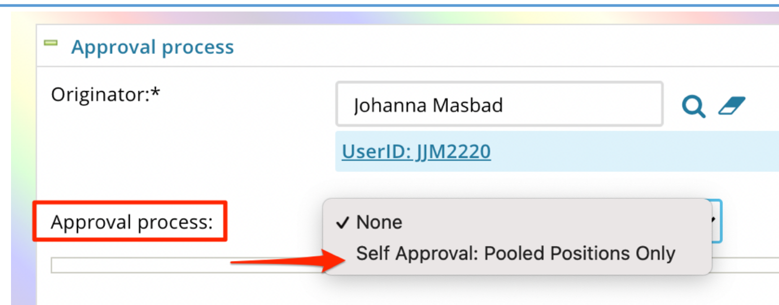
You will be taken back to the *Offer Details* card and can find your newly merged offer documents in that section.

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



STEP 5:

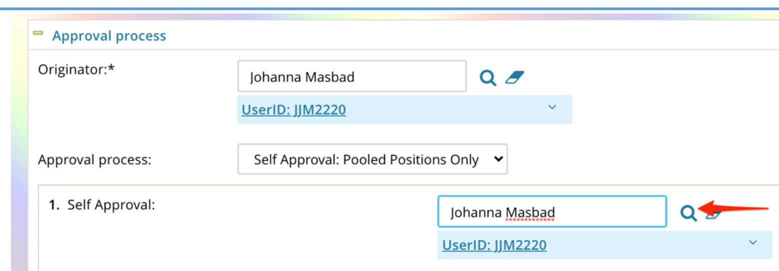
To select the approval process click the drop down menu. Select **Self Approval: Pooled Positions Only.**

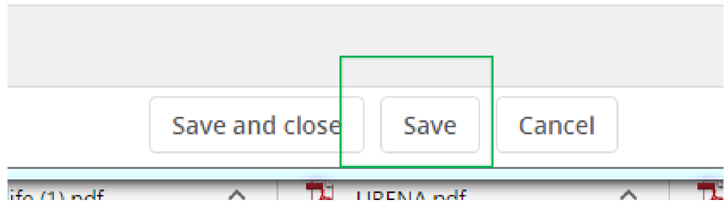
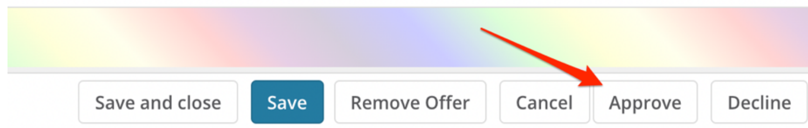
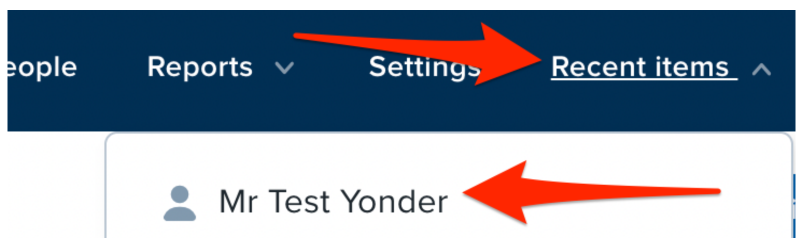
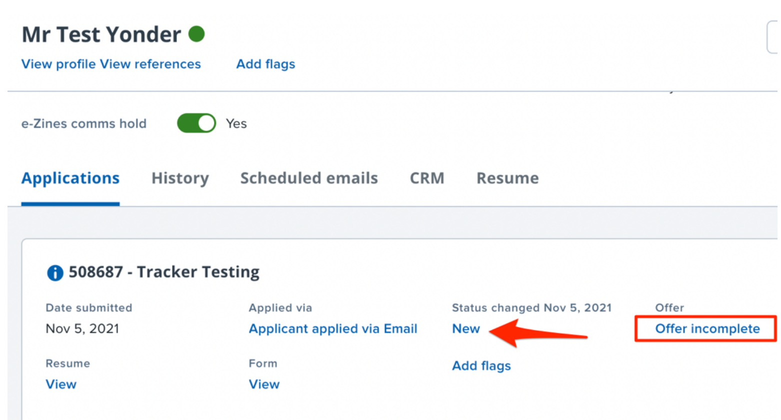


STEP 5.1

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

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



STEP 5.2 **Save Offer details card.** Click **Save**. Click **Okay**. Now your offer card is complete and saved.	
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.	
STEP 6: Navigate back to the applicant card. In the top menu bar, click **Recent items.** From the drop down menu, you should see the name of your candidate. Click on the applicant's name and you will open the applicant card.	
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.)* Under status, click **New**.	

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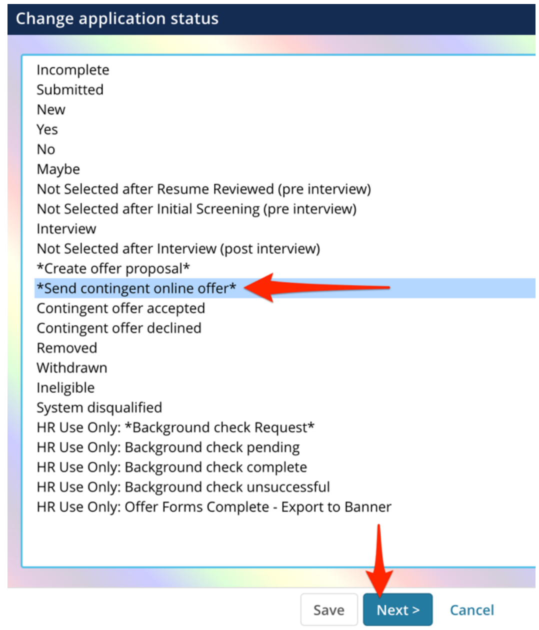
STEP 7.1: Change the application status.

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 depending on the recruitment process.



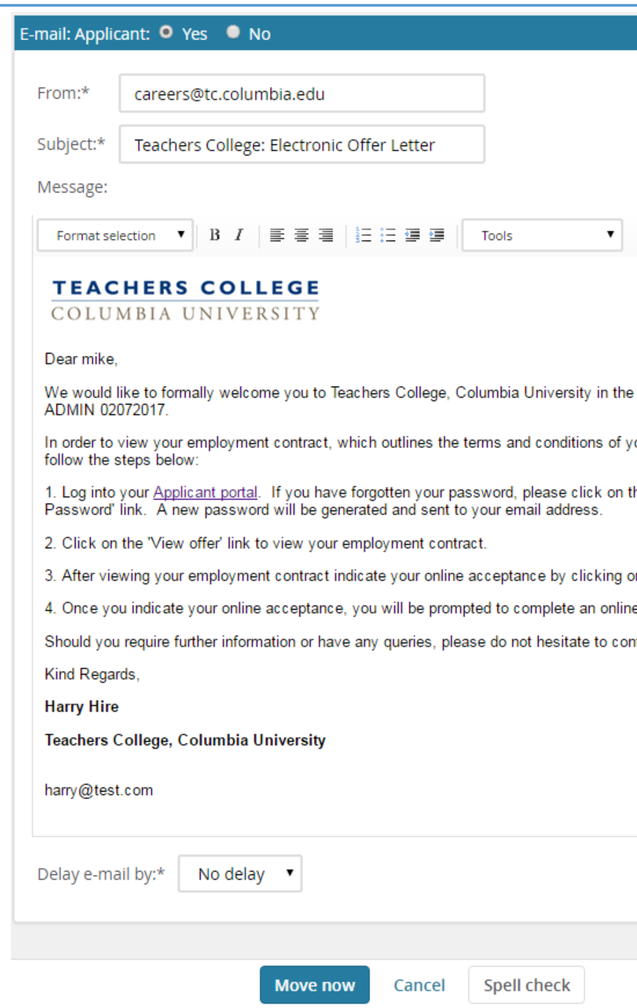
STEP 7.2: Review email to be sent to candidate

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.

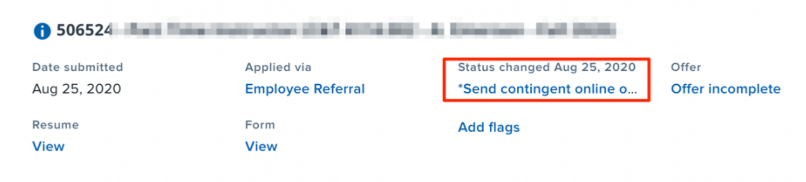
Click **Move now.** This will send the email to the candidate. They will be required to click on the *Applicant portal* link in the email to accept the offer and complete the post hire forms.

*Please encourage candidates to complete this step as soon as they receive this email



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.