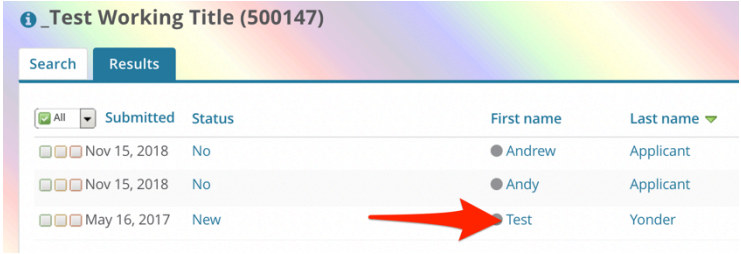
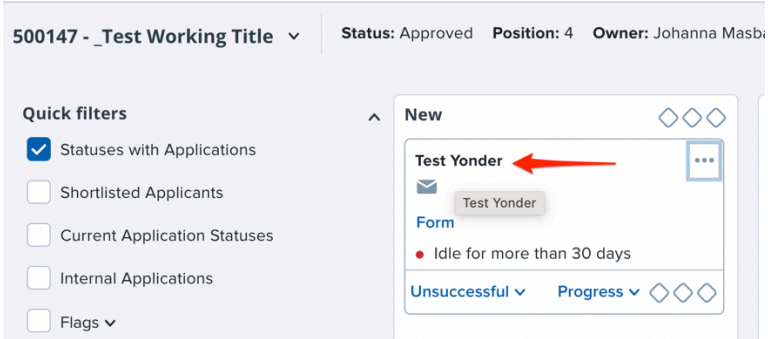


Making an Offer - RA/TA & PT Professional Students

This guide covers the offer creation process for employees in e-classes/accounts: 87/6422, and 45/6432.

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 View Applications page. On the selected candidate’s record, click their name.</p> <p>Method 2 – Applicant progress board 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> 



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: May 16, 2017	Applied via: none	Status changed Feb 20, 2020	Offer No offer
Resume View	Form View	Add flags	

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 (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:*

STEP 3.1: Salary

The Annual salary, Hourly pay rate, and overtime rates must be filled in regardless of the status of the position.

Enter the employee's full appointment amount in the Annual Salary / Appointment Amount box.

Please type in a 0 for the hourly and overtime rates.

Designated Pay Day:

Approved Range:

Pay Scale No. PN - RA
Minimum \$ 1,000.00
Maximum \$ 10,000.00

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.

FLSA status:

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



STEP 3.2 REQUIRED

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 RA, TA, & PT Professional Student roles, the offer letter will be incomplete (which is a compliance violation) and will be declined by the approver.

Term:	Select
Semester Year:	
Enter 4 digit year (ex. 2016)	
Semester Start Date:	<input type="text"/>
Semester End Date:	<input type="text"/>
Start Date of Appointment:	<input type="text"/>
End Date of Appointment:	<input type="text"/>

STEP 3.3

Onboarding Form: Select Student Post Offer

One notable mandatory field is the **Onboarding workflow**. For RA/TA and PT Professional Student 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).*

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:



Step 3.3 Note:

Note: You will see just below the Onboarding 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.

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.

For RA/TA Employees:

- Select **Offer Letter: Student - Research Assistant/Teaching Assistant**
- Select **Pay Rate Notice: RA/TA**

For PT Professional Students:

- Select **Offer Letter: PT Professional Student**
- Select **Pay Rate Notice: PT Professional Student**

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

- 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: Research Assistant/Teaching Assistant	GENERIC_GENERICLIST14*

Retry Ignore

Back Cancel

STEP 4.3

You will be taken back to the *Offer Details* card where you will find the newly merged offer documents.

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

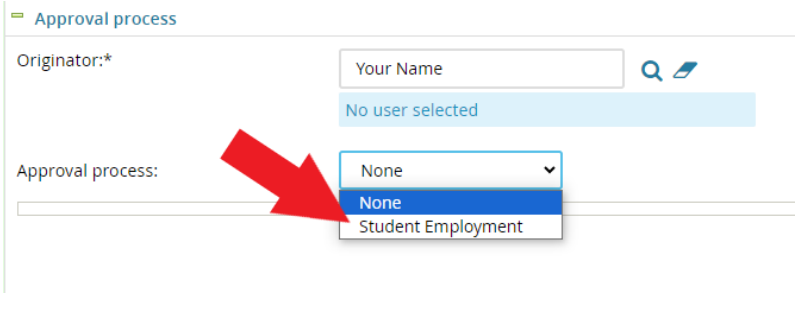
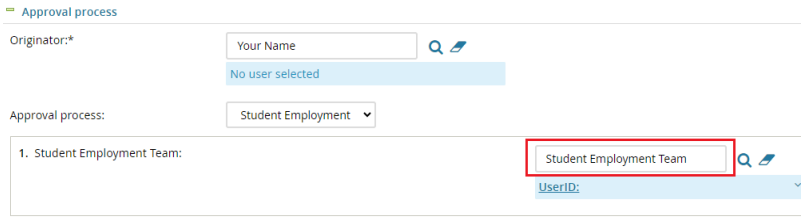
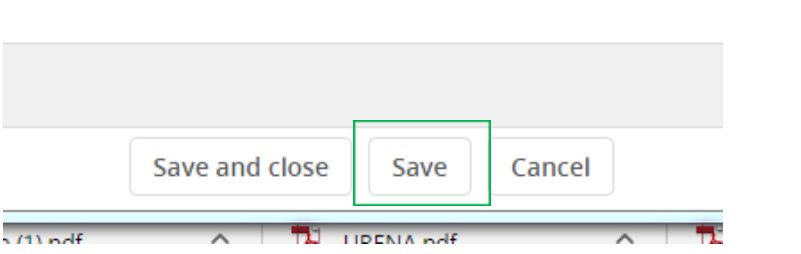
Add document Merge document

Document	Date	Size	Category	
Pay Rate Notice: Research Assistant/Teaching Assistant (Mandatory)	Jul 23, 2024	28kb	Pay Rate Notice	View Delete
Student Research Assistant Teaching Assistant Davis, Demario Offer Letter	Jul 23, 2024	44kb	Offer Contracts	View Delete

Document library:

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



<p>STEP 5 Select the approval process From the drop down menu, select Student Employment</p>	
<p>STEP 5.1 The approval line should stay with the default, Student Employment Team.</p>	
<p>STEP 5.2 Save Offer details card. Click Save. Click Okay.</p> <p>Now your offer card is complete and saved. The Student Employment team will review the offer details and respond to the offer.</p> <p>However the Student Employment team responds, you will receive an email update.</p> <p>If the offer is approved, <u>no further action is required on your part.</u></p> <p>The Student Employment team will send the offer to the candidate for electronic response.</p> <p>If it is declined, proceed to Step 6.</p>	



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 Jul 12, 2023	Applied via Job	Status changed Jul 12, 2023 New
--------------------------------	--------------------	------------------------------------

510852 - Test e-class 93 & TCNext

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

Applications **History** Scheduled emails CRM Resume

Job: All Item: All

Note
Today, 9:34am
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**

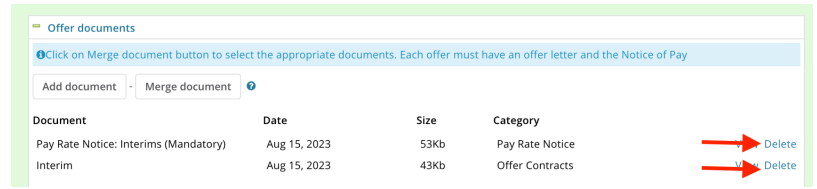
Restart



Step 6.2 Recreate offer documents and resubmit for approval.

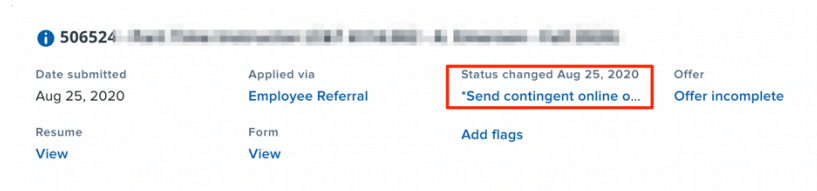
Go to the Offer documents section. Remove the old offer letter & pay rate notice by clicking Delete.

Repeat **Step 4** to create new offer documents and **Step 5** to send through the approval workflow again.



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 nor completed post offer forms
Offer accepted	Candidate accepted offer, but needs to complete forms.
HR USE ONLY: Offer Forms Complete	Candidate completed offer forms and will be hired