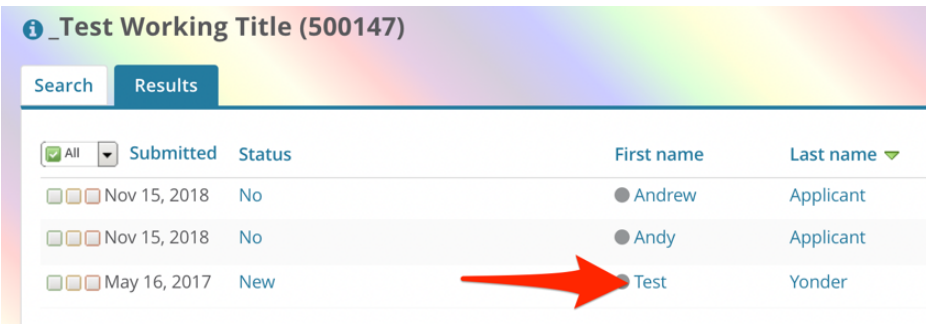
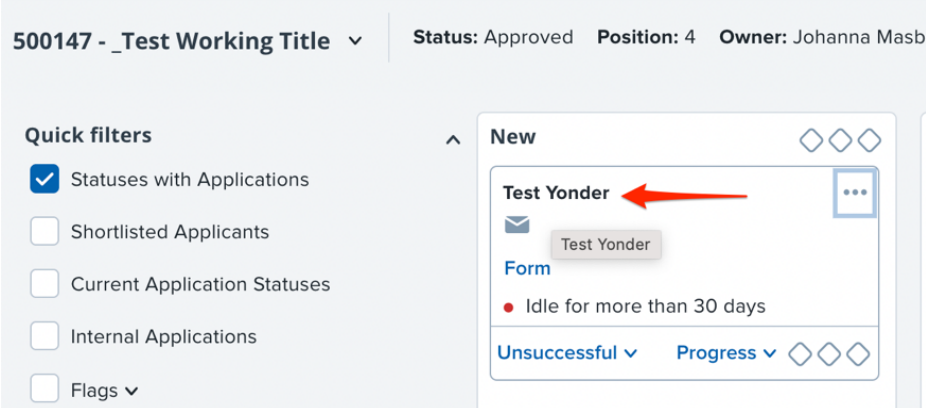




Making an Offer - Community Teachers & Part-Time Instructors

This guide covers the offer creation process for Community Teachers (eclass 39 / account 6142) and PT Instructors (eclass 31 / account 6122)

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 Manage applications page. On the selected candidate’s record, click their name.</p> <p>Method 2 – Applicant progress board</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 this link for instructions.</i></p>	<p>Method 1</p>  <table border="1"> <thead> <tr> <th>Submitted</th> <th>Status</th> <th>First name</th> <th>Last name</th> </tr> </thead> <tbody> <tr> <td>Nov 15, 2018</td> <td>No</td> <td>Andrew</td> <td>Applicant</td> </tr> <tr> <td>Nov 15, 2018</td> <td>No</td> <td>Andy</td> <td>Applicant</td> </tr> <tr> <td>May 16, 2017</td> <td>New</td> <td>Test</td> <td>Yonder</td> </tr> </tbody> </table> <p>Method 2</p> <p>Applicant Progress Board</p>  <p>500147 - _Test Working Title Status: Approved Position: 4 Owner: Johanna Masb...</p> <p>Quick filters</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Statuses with Applications <input type="checkbox"/> Shortlisted Applicants <input type="checkbox"/> Current Application Statuses <input type="checkbox"/> Internal Applications <input type="checkbox"/> Flags <p>New</p> <p>Test Yonder</p> <p>Form</p> <ul style="list-style-type: none"> Idle for more than 30 days <p>Unsuccessful Progress</p>	Submitted	Status	First name	Last name	Nov 15, 2018	No	Andrew	Applicant	Nov 15, 2018	No	Andy	Applicant	May 16, 2017	New	Test	Yonder
Submitted	Status	First name	Last name														
Nov 15, 2018	No	Andrew	Applicant														
Nov 15, 2018	No	Andy	Applicant														
May 16, 2017	New	Test	Yonder														



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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.

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	Offer
May 16, 2017	none	New	No offer
Resume View	Form View	Add flags	

STEP 3. Complete the offer details card.

In the **Employee Type** field, please select **All Other Pooled Positions** for Community Teachers and all other Part Time Instructors.

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 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:*

Supervising Department:

4. Hours per week:*

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.



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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:

Approved Range:  

Pay Scale No. PN - COMM
Minimum \$ 1,500.00
Maximum \$ 8,000.00

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 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 REQUIRED

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

- Courses taught by Adjunct/Part Time Instructor
- Department Chair - Name



If left blank, you will receive an error in Step 4 as your offer letter will not be properly merged.

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

ACADEMIC APPOINTMENT DETAILS

Program Name:

Courses taught by Adjunct/Part-Time Instructor:

Department Chair - Name:  
No user selected



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STEP 3.3

Go to **12 - Onboarding form.**

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

For **13 - Onboarding Workflow**, select **PT Instructional**

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).

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:*

Standard Post Offer

13. Onboarding workflow:*

PT Instructional

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:

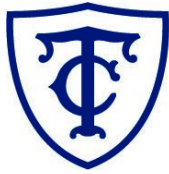
Yes No

Date offer accepted:

Offer declined:

Yes No

Date offer declined:



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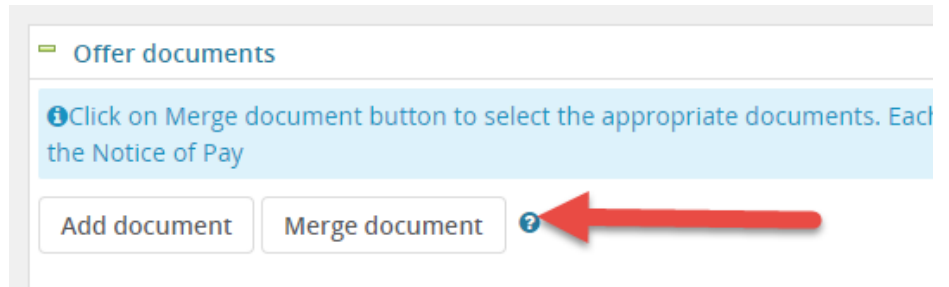
STEP 4

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 **Part Time Instructional** folder.

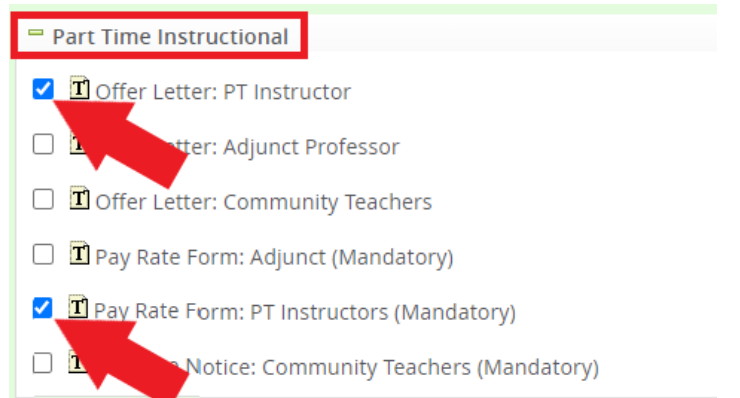
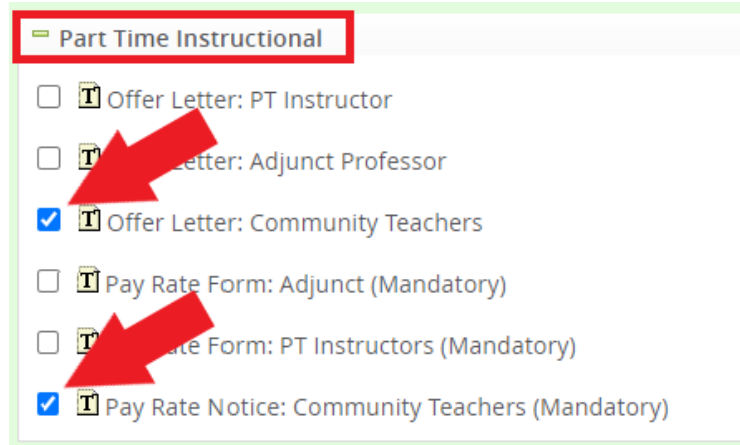
For Community Teachers:

- Select **Offer Letter: Community Teachers**
- Select **Pay Rate Notice: Community Teachers**

For PT Instructors and Fee Based Instructors:

- Select **Offer Letter: PT Instructor**
- Select **Pay Rate Form: PT Instructors**

Click **Merge**.





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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**.

The screenshot shows a 'Document merge' window with a warning message: 'Some applicant merge information is missing, which may result in the document containing errors.' Below this, a table lists missing fields. The field 'APPLICANTSTREET*' is highlighted with a red box. Below the table are radio buttons for 'Retry' and 'Ignore', with 'Ignore' selected and highlighted by a red box. At the bottom, there are 'Back' and 'Cancel' buttons, with 'Back' highlighted by a red box.

Document	Missing merge information
Pay Rate Notice: College Work Study (Mandatory)	APPLICANTSTREET*

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.*

The screenshot shows the 'Offer documents' section with a table of documents. The table has columns for Document, Date, Size, and Category. Two documents are listed: 'Pay Rate Form: Adjunct (Mandatory)' and 'Offer Letter: Adjunct Professor'. Each document has 'View' and 'Delete' links. Below the table is a 'Document library' section with columns for Name, Date, and Size.

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

STEP 5

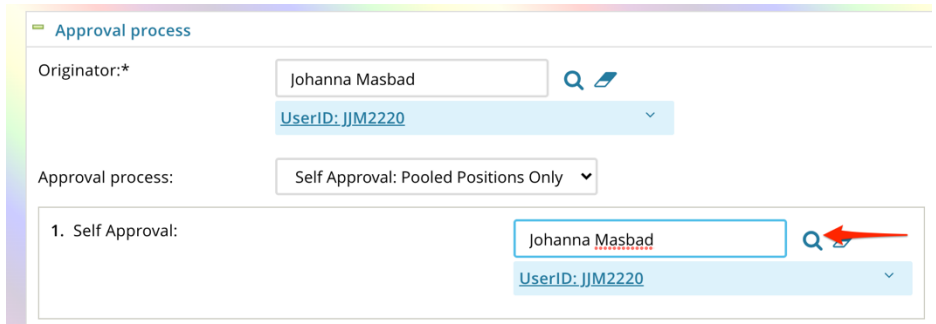
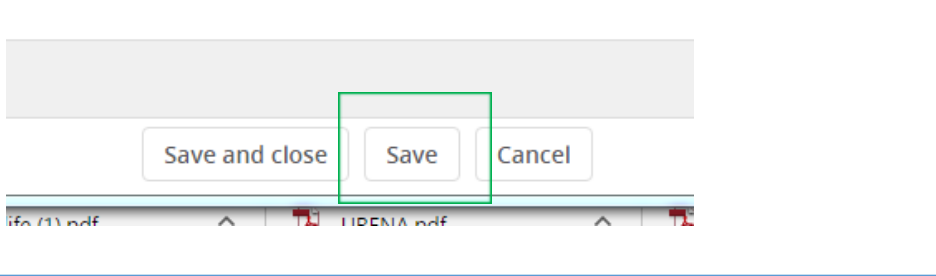
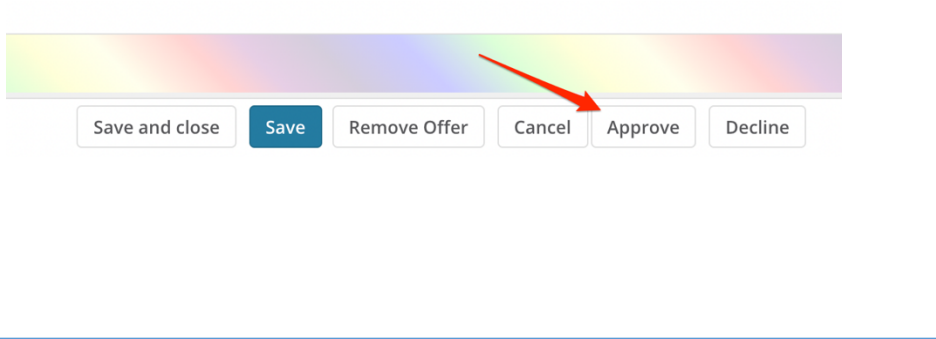
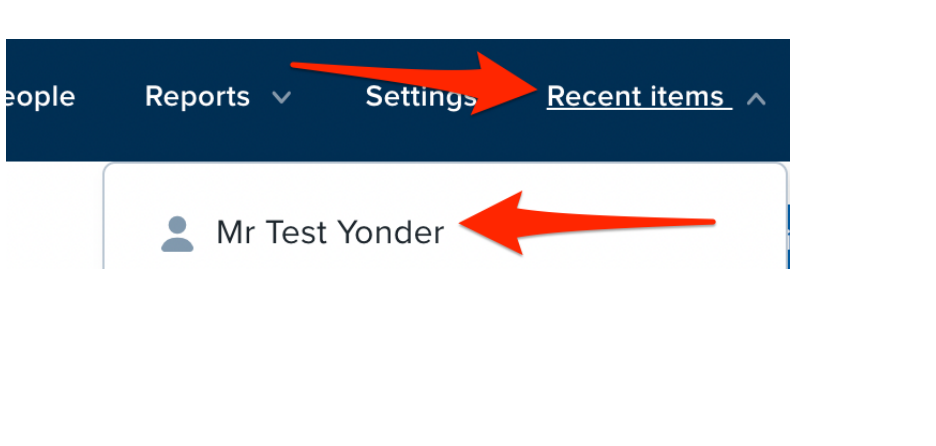
Select the approval process
From the drop down menu, select **Self Approval: Pooled Positions Only**

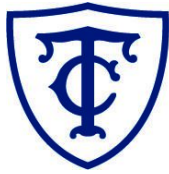
The screenshot shows the 'Approval process' section. The 'Originator:*' field is set to 'Johanna Masbad' with 'UserID: JJM2220' displayed below. The 'Approval process:' dropdown menu is open, showing two options: 'None' (checked) and 'Self Approval: Pooled Positions Only'. A red arrow points to the 'Self Approval: Pooled Positions Only' option.



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<p>STEP 5.1 In the approval line, select your name as the user. <i>You can type in your name or use the magnifying glass.</i></p>	
<p>STEP 5.2 Save Offer details card. Click Save. Click Okay.</p> <p>Now your offer card is complete and saved.</p>	
<p>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.</p>	
<p>STEP 6: Navigate back to the applicant card. In the top menu bar, click Recent items.</p> <p>From the drop down menu, you should see the name of your candidate.</p> <p>Click on the applicant's name and you will open the applicant card.</p>	



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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**.

Mr Test Yonder ●

[View profile](#) [View references](#) [Add flags](#)

e-Zines comms hold Yes

[Applications](#) [History](#) [Scheduled emails](#) [CRM](#) [Resume](#)

508687 - Tracker Testing

Date submitted Nov 5, 2021	Applied via Applicant applied via Email	Status changed Nov 5, 2021 New ←	Offer Offer incomplete
Resume View	Form View	Add flags	

STEP 7.1: Change the application status.

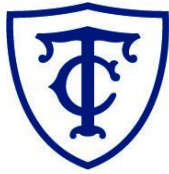
From the pop up box, select ***Send contingent online offer*** and click **Next>**

****Note, you may not see all of the listed application status. These vary dependent on recruitment process.**

Change application status

- Incomplete
- Submitted
- New
- Yes
- No
- Maybe
- Not Selected after Resume Reviewed (pre interview)
- Not Selected after Initial Screening (pre interview)
- Interview
- Not Selected after Interview (post interview)
- *Create offer proposal*
- *Send contingent online offer*** ←
- Contingent offer accepted
- Contingent offer declined
- Removed
- Withdrawn
- Ineligible
- System disqualified
- HR Use Only: *Background check Request*
- HR Use Only: Background check pending
- HR Use Only: Background check complete
- HR Use Only: Background check unsuccessful
- HR Use Only: Offer Forms Complete - Export to Banner

Save **Next >** Cancel



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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

E-mail: Applicant: Yes No

From:*

Subject:*

Message:

Format selection B I Tools

TEACHERS COLLEGE
COLUMBIA UNIVERSITY

Dear mike,

We would like to formally welcome you to Teachers College, Columbia University in the f ADMIN 02072017.

In order to view your employment contract, which outlines the terms and conditions of yo follow the steps below:

1. Log into your [Applicant portal](#). If you have forgotten your password, please click on the 'Password' link. A new password will be generated and sent to your email address.
2. Click on the 'View offer' link to view your employment contract.
3. After viewing your employment contract indicate your online acceptance by clicking on
4. Once you indicate your online acceptance, you will be prompted to complete an online

Should you require further information or have any queries, please do not hesitate to cont.

Kind Regards,
Harry Hire
Teachers College, Columbia University

harry@test.com

Delay e-mail by:*

Additional Notes: Tracking the Applicant's Hiring Process

Please note: All Part Time Instructors and Community Teachers must go through a background check conducted by HR.

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: *Send contingent online o... | 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.