

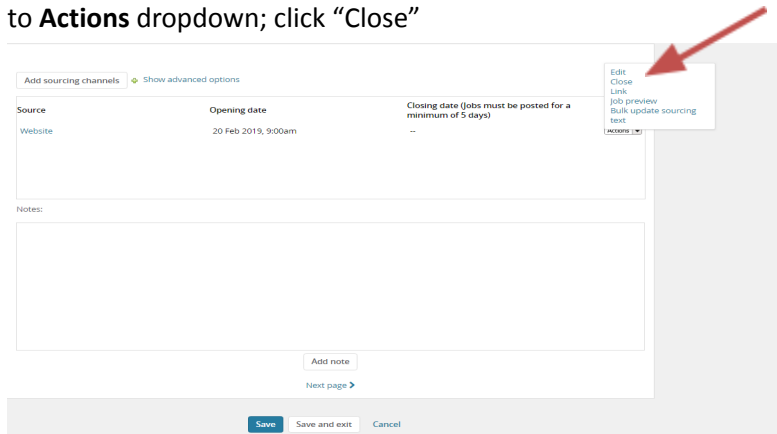
How to Manage Offers

This job aid provides step-by-step directions for managing offers in TalentLink. Steps include submitting a finalist for approval to Central HR or the University's Office of Equal Opportunity and Affirmative Action (EOAA), creating and sending an offer (pages 5-9), initiating a background check (pages 9-11) and finalizing hiring (page 12). Use this job aid after you have selected a finalist.

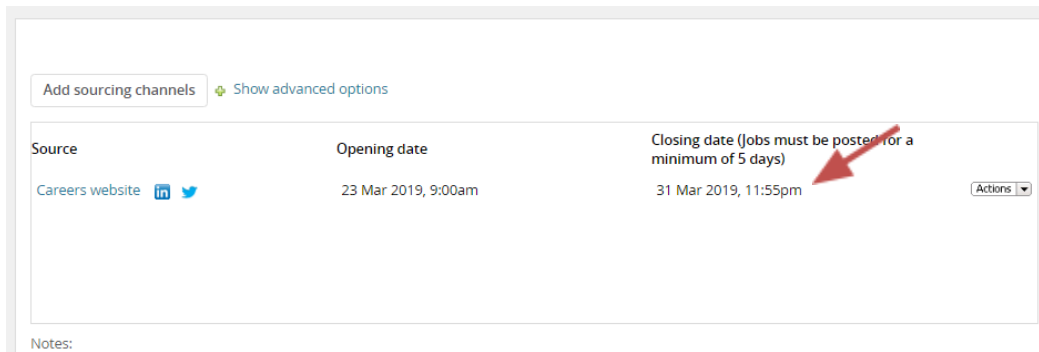
Permission groups Level 2, 3 and 4 can create offers. If you have questions about your permission group, contact your Client Manager.

SUBMITTING FINALIST FOR APPROVAL

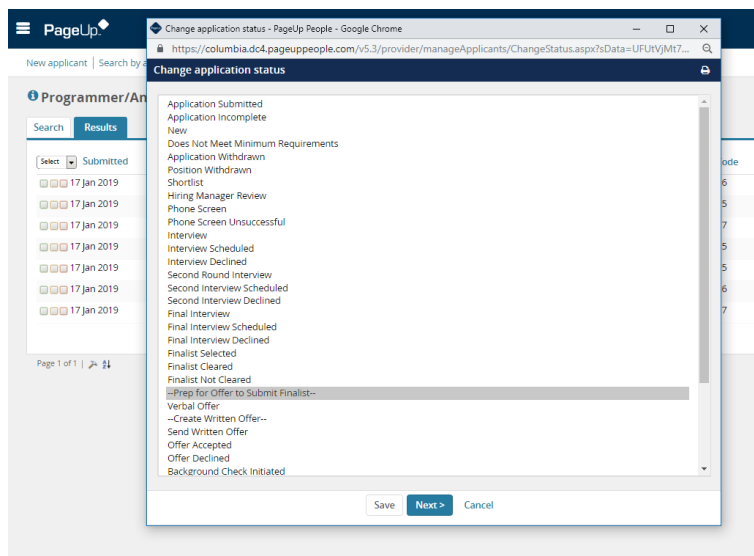
1. Log in to my.columbia.edu; under the HR Manager Resources tab, select "TalentLink".
2. Access the requisition through the Dashboard or through the menu (three horizontal lines) at the top left of the page by selecting "Manage Requisitions".
3. Remove the job posting from the Careers site once a finalist has been identified (Level 4 users only).
 - Go to the **Posting** tab
 - Go to **Actions** dropdown; click "Close"



- Click "Ok" in popup window to confirm the closing.
- Confirm sourcing channel is closed by viewing the closing date under **Closing date** column.



4. Click “View applications” to view the applicants once the job posting has been taken off the Careers website; find or search for the finalist.
5. Click **Status** of the finalist; select - **-Prep for Offer to Submit Finalist-** -.
 - **External Candidates:** Ensure that **Part 1: Education and Employment Verification is Cleared** before you proceed with submitting the finalist for approval to CUHR.




6. Click “Next>” to review the status change. Some statuses include default emails (see list of [Application Statuses and Notifications](#)). This one, for example, does not, but you can add one by selecting “Yes” next to “Email Applicant” or “Additional users from job”.
7. Click “Move now” to confirm the status change.


Fill in applicable **Offer Details** (this is also known as the Offer Card) fields, beginning with the **Hiring Proposal** section. Fields marked with an asterisk are mandatory.

Note: It is important to fill in all applicable fields because they populate the offer letter.

- The salary range must match the range posted on the Careers website. The Annual salary **cannot** exceed the maximum of the posted range.

HIRING PROPOSAL

Start Date:* 

End date, if Temporary: 

FLSA status: Non-Exempt


Hours per week: 35

Standard Work Schedule:

Full Time/Part Time: Full Time

SALARY

Salary Range: \$40,000 - \$50,000

Annual Salary: 

Hourly Rate (if not Annual Salary):

Overtime Rate:

Pay Frequency: ▼

Wage per Pay Period:

- Select an “Onboarding Form” in the **Onboarding** section. This is the form the finalist will complete after accepting an offer. Use:
 - New Hire Form** for a new hire/rehire;
 - New Hire Form (Transfer Only)** for a current internal employee who is transferring to a different department or different role.
- Select an **Onboarding Workflow** to determine whether or not the finalist will need access to the Onboarding Portal.
- Click on the Onboarding Workflow dropdown to select the appropriate onboarding process.

ONBOARDING

New Hire Form:*

Onboarding Workflow:

Onboarding Delegate:

Reports to manager:*

Reports to Manager Business Title:*

OFFER PROGRESS

Onboarding workflows:

- **Internal Transfers:** For employees transferring within Columbia University
- **New Employee – CU:** For new Officers and Staff
- **New Employee – CUIMC:** Onboarding process for the Medical Center
- **No Onboarding:** For promotions and job upgrades within a department
- **Non-Benefits Eligible CU:** Non-benefit eligible roles (VHO, temporary roles less than four months, temporary part-time roles, less than 20 hours per week)
- **Non-Benefits Eligible CUIMC:** Non-benefit eligible roles (VHO, temporary roles less than four months, temporary part-time roles, less than 20 hours per week)

12. Review manager’s name in the **Reports to manager** field. The name entered in the Requisition will populate this field.
13. Enter the **Reports to Manager Business Title**. This title will appear in the offer letter.
14. Enter a name or lookup an **Onboarding delegate** to delegate new hire tasks to another member of your team (optional).
15. **Skip the OFFER PROGRESS section**. It will auto-update after the finalist accepts or declines the offer.

16. Review **Employee referrals** section if you added a referral bonus on the requisition.
17. **Skip Offer Documents** section. The **Offer Documents** section is where the offer letter is created. Only complete this section after the finalist has been approved by Central HR or EOAA.
18. Review **Application documents**. These are documents submitted by the applicant (i.e., resume, cover letter).
19. Go to the **Approval Process** section at the bottom; review **School/Dept HR** field. The name entered in the Requisition will populate this field.
20. Select an approval process:
 - **EOAA Waiver** to send the offer card to EOAA for final approval; use when job is a waiver and a grade 14/106 or above. Before submitting an EOAA waiver, speak to your HR Client Manager.
 - **Submit Applicant to Central HR** if this position is on the Morningside/Manhattanville/Lamont campuses. The Offer Card will be routed to hrcs-talentlink@columbia.edu for review and approval.
 - **Submit Applicant to CUIMC Central HR** if this position is on the cuimc campus

21. Follow the steps related to your selected approval process:

EOAA Waiver

- a. Review **School/Dept Approver**. The name entered in the Requisition will populate this field.
- b. The **EOAA Approver** field is already populated with the approver from EOAA. **Do not make changes to this field.**
- c. Click “Save”. The page will refresh. Scroll down to the **Approval process** field and confirm the requisition is awaiting the School/Dept approval.
- d. If you are the **School/Dept HR** and **School/Dept Approver**, after clicking “Save”, scroll down to the **Approval process** field and click “Approve”, then scroll down to the **Approval process** field again to confirm the requisition is approved and awaiting Central HR approval.

Submit Applicant to Central HR

- a. Review **School/Dept Approver**. The name entered in the Requisition will populate this field.
- b. Review **Central HR Approver**. The name entered in the Requisition will populate this field.
- c. Click “Save”. The page will refresh. Scroll down to the **Approval process** field and confirm the requisition is awaiting the School/Dept approval.
- d. If you are the **School/Dept HR** and **School/Dept Approver**, after clicking “Save”, scroll down to the **Approval process** field and click “Approve”, then scroll down to the **Approval process** field again to confirm the requisition is approved and awaiting Central HR approval.

Submit Applicant to CUIMC Central HR

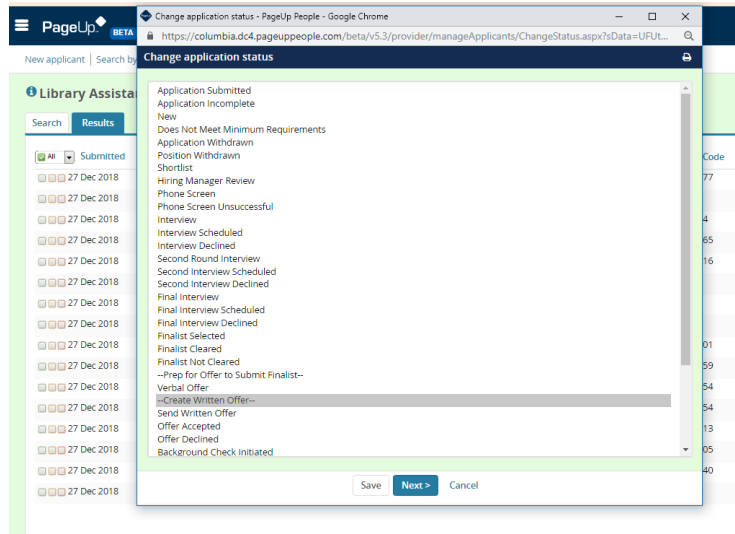
- a. Review **School/Dept Approver**. The name entered in the Requisition will populate this field.
- b. The **Central HR Approver** is CUIMC HR. Requisition approval requests go to the CUIMC HR shared inbox. A member of the CUIMC HR team will approve. **Do not make changes to this field.**
- c. Click “Save”. The page will refresh. Scroll down to the **Approval process** field and confirm the requisition is awaiting the School/Dept approval.
- d. If you are the **Initiator** and **School/Dept Approver**, after clicking “Save”, scroll down to the **Approval process** field and click “Approve”, then scroll down to the **Approval process** field again to confirm the requisition is approved and awaiting Central HR approval.

22. Click “Save and close” to return to the applicant list. Wait for Central HR or EOAA to approve the finalist before creating the offer letter.

CREATING AND SENDING AN OFFER

23. Go to the Applications page (either from the Dashboard or by clicking the menu (three horizontal lines) and selecting “Manage Requisitions.” Click the number listed in the “Applications” column (number corresponds with number of submitted applications).

24. Click **Status** of the finalist; select **-Create Written Offer-** to activate the Offer Card again.

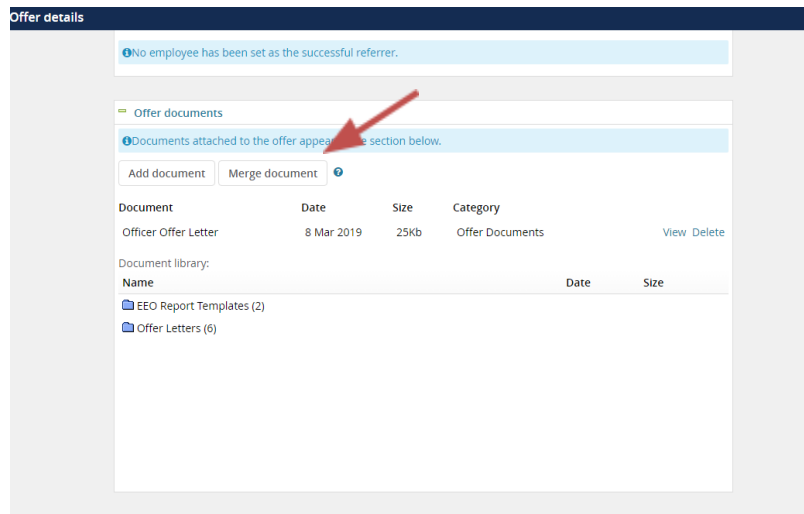


25. Click “Next>” to review status change and communication preferences.

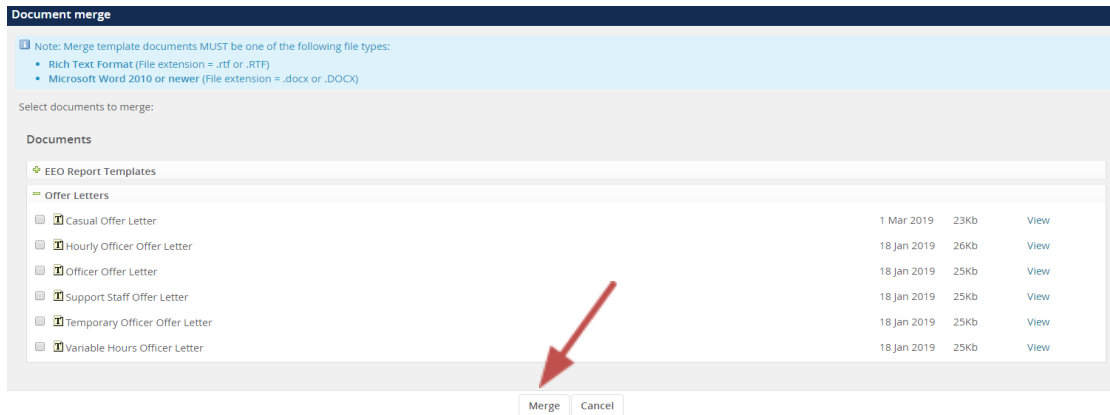
26. Click “Move now” to confirm status change.

27. Scroll down to **Offer documents** to upload the offer letter. Click “Merge Document”.

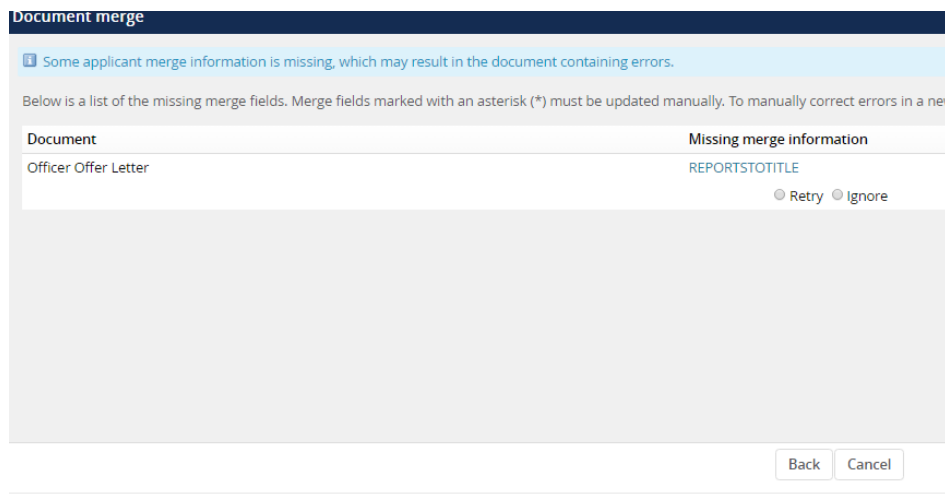
Note: Do not be intimidated by the word “merge”. All offer letter templates contain merge fields, placeholders (i.e., JOBTITLE) that will be filled in by requisition, applicant card and offer card fields.



28. Select the appropriate Offer Letter template and click “Merge”.



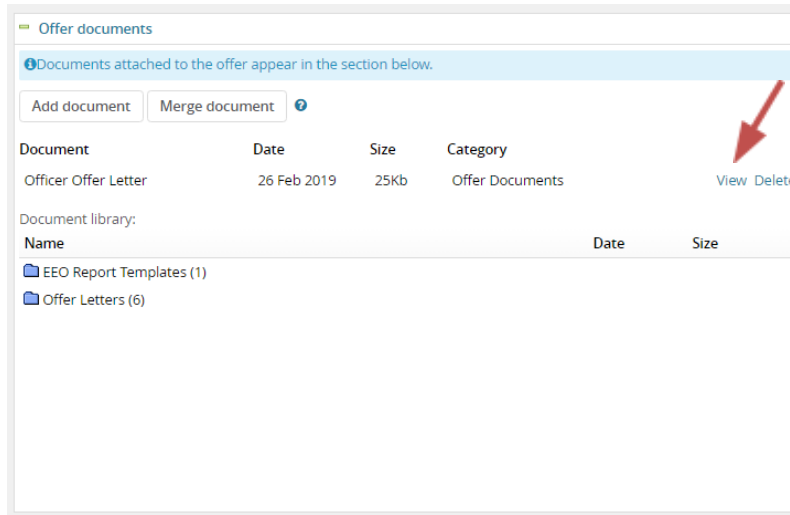
Note: If you did not fill in all merge fields on the offer card, you will see the missing fields after clicking “Merge”. If you click “Ignore”, you must fill in the information when you review the offer letter.



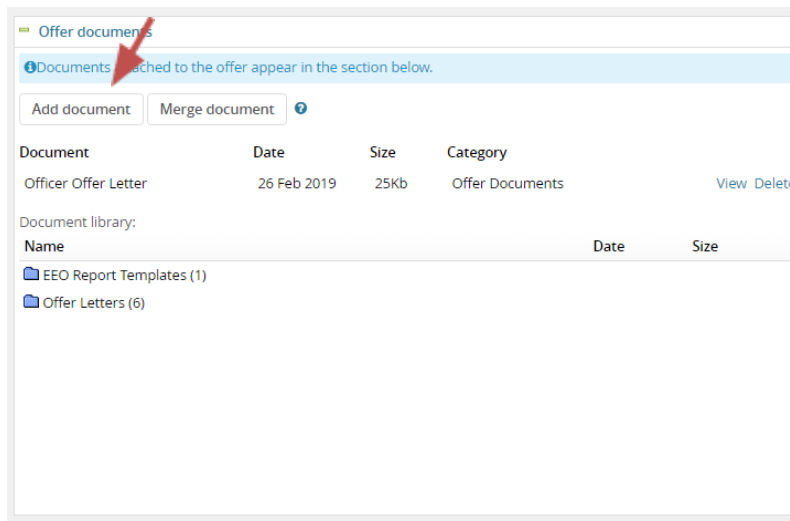
Example of missing merge field

29. Confirm offer letter has been uploaded by reviewing the Offer Letter listed under **Document**.

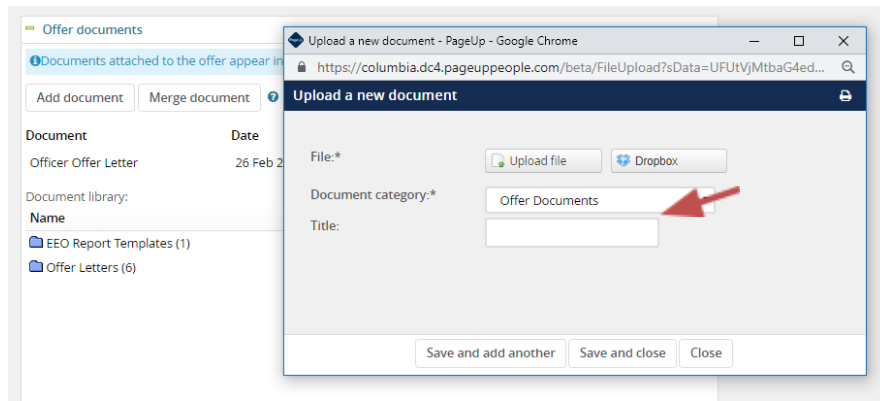
30. Click “View” to download the offer letter as a Word document.



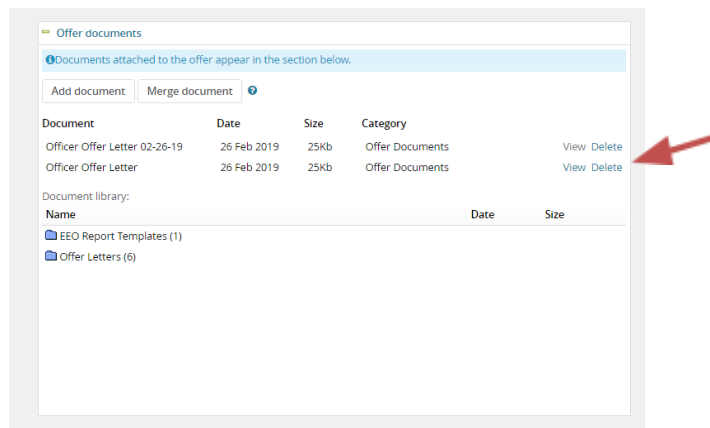
31. Review the applicant and position information fields merged in the letter. If you ignored any missing merge fields when merging the document, you must fill in now.
32. **Skip to step 32 if there are no changes to the offer letter.** The Casual Offer Letter must **always** be reviewed to select worksite information.
33. To upload a revised offer letter:
 - Save the revised offer letter to your computer and give it a slightly different file name so you can differentiate between versions.
 - Click “Add Document” in the Offer Documents section; find revised offer letter; upload file.



- Add a Title. Create a straightforward, appropriate title; it will be visible to the finalist.
Note: If you do not add a title, the file name will be visible to the finalist.
- Click “Save and close”.

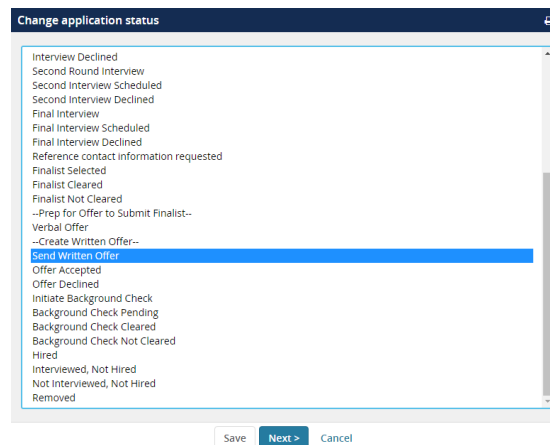


- Delete previous version of the offer letter so that there is only one offer letter on file.



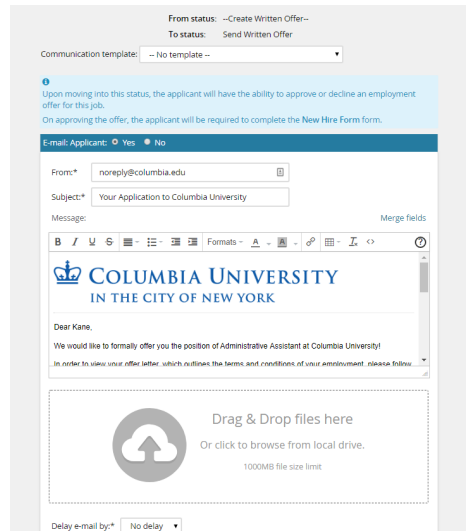
34. Scroll to the bottom and click “Save and close” to save Offer Card.

35. Click **Status** of the finalist; select “Send Written Offer” to send the offer letter to the finalist.



36. Click “Next >” to review status change.

Note: You must send the default email to the finalist because it contains instructions on how to view their offer.

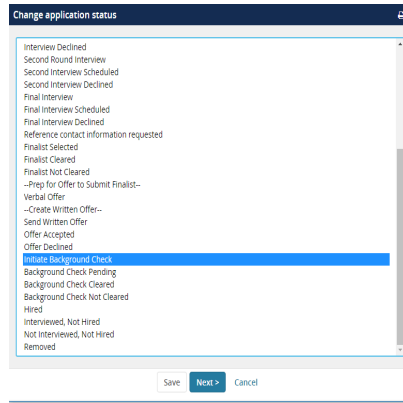


37. Click “Move now” to confirm sending the offer. Wait for finalist to accept or decline the offer before proceeding.
 - If the finalist declines an offer, the application status will automatically change to “Offer Declined”.
 - If the finalist accepts an offer, their application status will automatically change to “Offer Accepted”.
 - After accepting the offer, the finalist will be prompted to complete the New Hire Form you chose on the Offer Card:
 - i. **New Hire Form** - new hire must fill in details required of a Template-Based Hire (TBH);
 - ii. **New Hire Form (Transfer Only)** - no personal details needed; only need to confirm acceptance again.

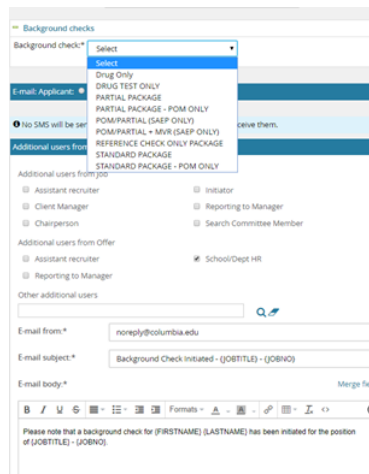
INITIATING A BACKGROUND CHECK

Note: Schools/departments on the Morningside/Manhattanville/Lamont campuses can initiate a background check within TalentLink. CUIMC HR will initiate a background check for schools/departments on the CUIMC campus.

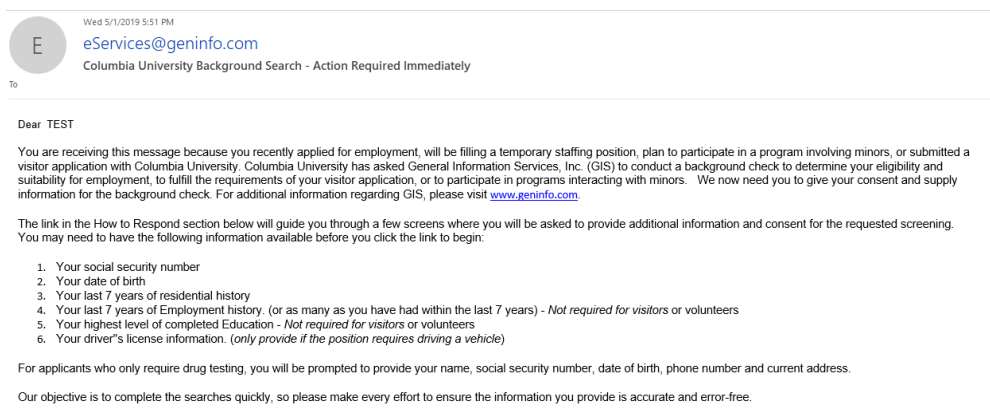
38. Confirm applicant has accepted offer by confirming status is **Offer Accepted**.
39. Click on **Status** of the finalist; select **Initiate Background Check**; click “Next>”.



40. Choose the Background check package from the **Background checks** dropdown; review default email templates.



41. Click “Move now” to confirm status change and alert the University’s background check vendor, HireRight (formally GIS), to email the finalist with login link and instructions on how to complete the background check.



42. Monitor progress of background check by viewing the finalist's status, which updates automatically throughout.
 - **Background Check Pending** - process has started.
 - **Background Check Cleared or Background Check Not Cleared** - process complete.
 - If status is Background Check Not Cleared, contact your Client Manager for further instructions.
 - If status is Background Check Cleared, go to Step 41.
43. Change finalist status to **Hired/Initiate Onboarding**. This is the final status, officially making a finalist a new hire. It is important to change the finalist to this status because:
 - It will allow the applicant and position data from TalentLink to feed into PAC to create a draft Template-Based Hire (TBH). This is applicable to external hires only.
 - Allow the new hire access to the Onboarding Portal
44. Move all non-hired applicants to a non-hired status, such as: Interviewed, Not Hired or Does Not Meet Minimum Qualifications. **This must be done before Central HR can fill the requisition.**

TalentLink Tip: Use the "Bulk move" action to move multiple applicants at once to the same status. Refer to the *How to Manage Applicants* job aid or watch the training video on the [Human Resources Website](#).