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Introduction

Once the verbal offer is accepted, the offer letter will be prepared in CHRS Recruiting then forwarded via email and/or DocuSign for approval. Offers for Faculty positions will be prepared and extended at the college or department level; please confirm the process with your College/HR Contact. The final approved letter will be forwarded to the candidate for review and signature via DocuSign. Once the letter is signed and the background check is clear, the final offer will be prepared and extended in CHRS Recruiting.

Background Check, Offer Letter Preparation, Approval and Signature

The background check and offer letter preparation may begin. Once the background check is cleared, the offer letter may be created in CHRS Recruiting and the approvals and signatures of the offer letter is handled outside of the CHRS Recruiting system. The final signed document will need to be uploaded back into CHRS Recruiting.

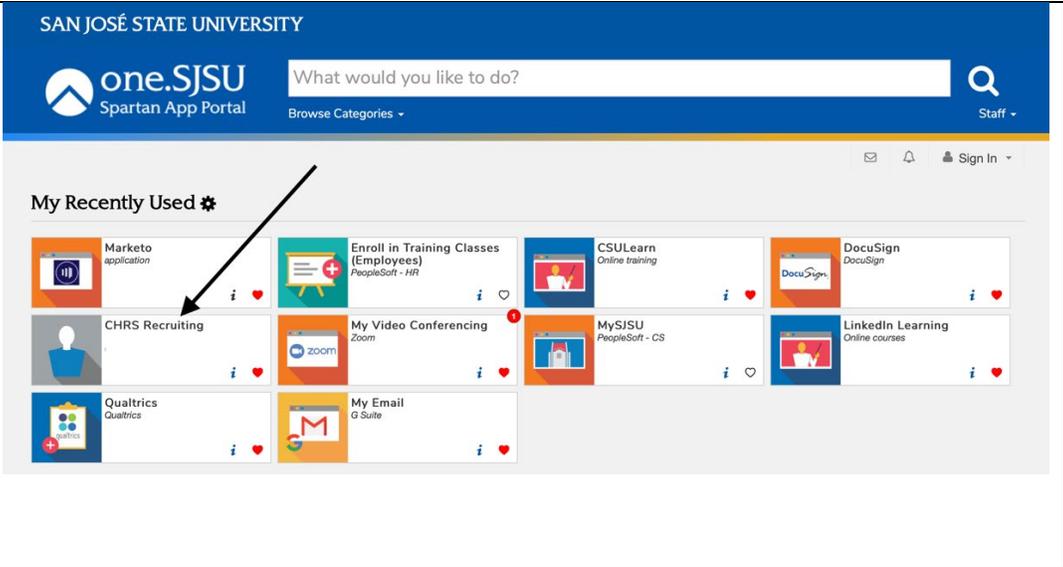
1. Move the candidate to the "Background Check Initiated" status in CHRS Recruiting. Refer to [Initiate and Manage Background Checks – Faculty](#) for guidance.
 - a. Please note, certain positions require LiveScan fingerprinting.
2. Move applicant to "Prepare Offer and Upload Transcripts". Edit the downloaded offer letter and forward to the appropriate individuals for approval. This process typically happens through DocuSign.
 - a. Please note: For all Lecturer positions, you must include James Lee, Senior Director, Faculty Services, first in the approval process, then the Dean and then the candidate.
3. Once the letter is signed and the background check is cleared, upload the signed offer in CHRS Recruiting, create the bulk compile file, and extend the final offer to the candidate via CHRS Recruiting.

Background Check

Log into CHRS Recruiting

1. Navigate to one.SJSU
2. Search for or click the CHRS Recruiting tile

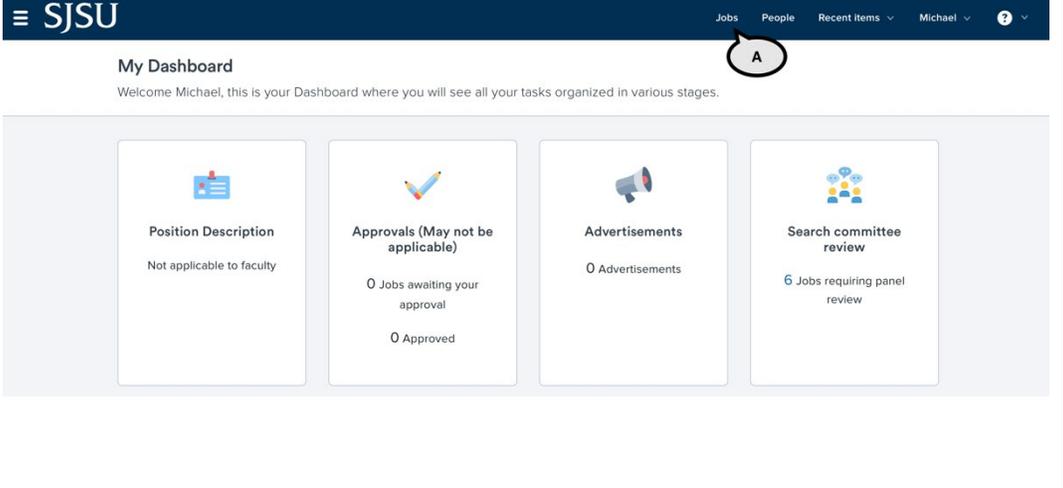
User your SJSUOne ID and password to log in



The Tiled Dashboard is Displayed

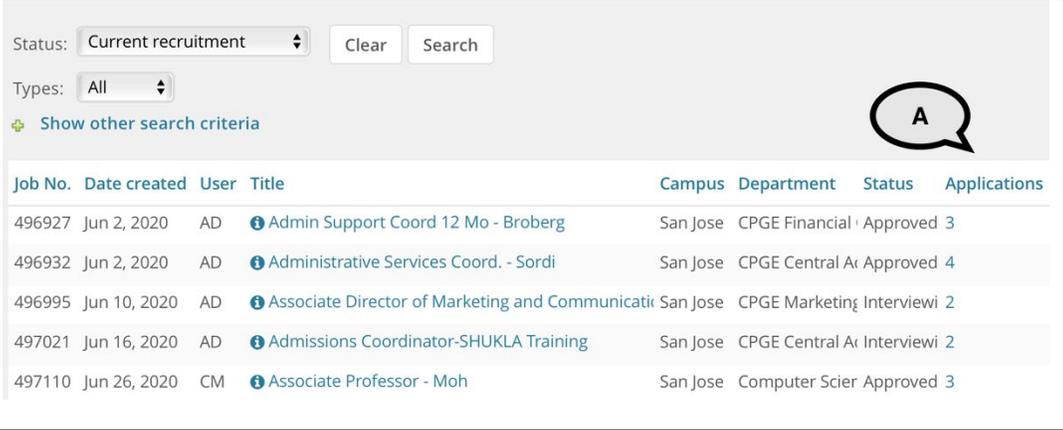
Please note, depending on your role the dashboard will look different.

From the tiled dashboard, click Jobs (A)



Select the Applications for the Job

Click the hyperlinked number (A) of applications for the job for which you wish to make an offer



The List Dashboard is Displayed

1. Change the View to Approved Jobs by clicking the appropriate circle (A)
2. Click the hyperlinked number of applications next to the icon of the appropriate job (B); if the candidate has already been moved to Prepare Offer you can click the hyperlink underneath the job title (C)

Current jobs

39 Total 24 All Notifications 5 Pending appr... **32 Approved** (A) 1 Interviewing 1 Offer

- Admin Support Assistant - Barr**
Requisition Number: 497061 Pamela Stacks Positions: 1 Vacancies: 1
1 application in Offer Extended for more than 3 days. [View](#) →
- Alternative Media Assistant - Santos**
Requisition Number: 497054 Scott Mendez Positions: 1 Vacancies: 1
- Assistant Professor - Palfreyman**
Requisition Number: 497060 Sen Chiao Positions: 1 Vacancies: 0
1 application in Formal Offer Accepted for more than 1 week. [View](#) →
1 shortlisted applicants. [View](#) →
- Assistant Professor - Steyer** (B)
Requisition Number: 497062 Lee Chang (C) Positions: 1 Vacancies: 1
2 new applications. [View](#) →
1 application in Prepare Offer and Upload Transcripts for more than 1 week. [View](#) →
1 shortlisted applicants. [View](#) →

Whether you navigate from the Tiled or List Dashboard, the list of applicants is displayed

Click the Status of the candidate for which you wish to extend an offer (A)

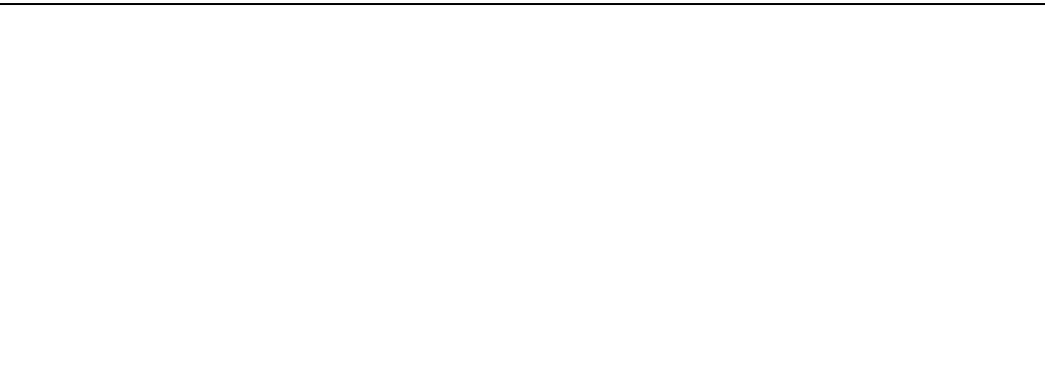
TEST - Faculty PT Pool (Julia's Test job) (497139)

Search **Results**

Submitted	Status	Applicant No	Pref Name	First name	Last name
Nov 17, 2021	Phone/Video Interview Successful (DO NOT SEL	177100		Dory	Tow
Nov 17, 2021	New Application (A)	177099		Fig	Newton
Nov 29, 2021	Phone/Video Interview Successful (DO NOT SEL	177132		Hash	Brown
	Incomplete	177131	Hyer	Hyer	Mi
	Incomplete	177098	Iwana	Iwana	Job

Background Check

1. Please refer to [Initiate and Manage Background Checks - Faculty](#)



Prepare the Offer

Move the Candidate to the Prepare Offer and Upload Transcripts status

1. Select the step in the status list (A)
2. Click Next (B)

Change application status

- Phone/Video Interview Invite
- Phone/Video Interview Accepted
- Phone/Video Interview Declined
- Phone/Video Interview Evaluation Summary
- Phone/Video Interview Successful (Send: RC&BR Form)
- Phone/Video Interview Successful (DO NOT SELECT-Completed: RC&BR Form)
- Phone/Video Interview Unsuccessful
- On Campus Interview Invite
- On Campus Invite Accepted
- On Campus Invite Declined
- On Campus Interview Evaluation Summary
- On Campus Interview Successful
- On Campus Interview Unsuccessful
- Background Check Initiated outside of CHRS Recruiting
- Background Check Initiated in CHRS Recruiting
- Background Check Pending Processing - DO NOT SELECT-SYSTEM STATUS ONLY
- Background Check Pending Adjudication - DO NOT SELECT-SYSTEM STATUS ONLY
- Background Check Unsuccessful
- Prepare Offer and Upload Transcripts**
- Formal Offer Extended
- Formal Offer Accepted-DO NOT SELECT-SYSTEM STATUS ONLY
- Offer Accepted Paperwork Received-DO NOT SELECT-SYSTEM STATUS ONLY
- Formal Offer Declined
- Job Closing Communication
- Offer Rescinded
- Recruitment Cancelled

Submit **Next >** Cancel

Confirm the status change

3. No communication will be sent to the candidate at this step (A)
4. If applicable, open the Additional users section and prepare the email (B)
5. If prompted to change the job status, do not change the status; this is only changed for Tenure-Track or Full-Time Temp recruitments
6. Click Move now (D)

Confirm status change

You are about to move Sparty Spartan to a different status:

From status: On Campus Interview Successful
To status: Prepare Offer and Upload Transcripts

Communication template: -- No template --

E-mail: Applicant: Yes No A

No SMS will be sent to the applicant as they do not wish to receive them.

Additional users from Job: Yes No B

Note

The following will be added to the applicant notes for administrators to view:

Update job status from Approved to Offer: Yes No C

Move now Cancel D

The Offer details window opens: Verify the Personal Details

1. Confirm the Address, Phone and Email information (A)
2. If the candidate is a current employee, enter their name in the Employee field (B). If the candidate is new or was a former SJSU employee (no longer active) do NOT enter their name here.

Offer details 🔒

Sparty Spartan

Personal details

Address: California United States Phone:

E-mail: sjsu.hrtest+987654321@gmail.com

Applicant No: 40056

[View profile](#)

Current or previous employee details

PLEASE NOTE: Once the selection is made and the Offer card is "Saved/Submitted", the selection **cannot be edited** by system users. In the event of an incorrect selection, do not move forward please contact your Campus Configuration Administrator to submit a "High Impact" JIRA ticket, which includes the correct Employee number from your campus' PeopleSoft environment.

Self-disclosed Employee ID (not applicable to CSU):

Employee: 🔍 ✎

No user selected.

Save and close Submit Cancel

Verify the Job and Offer Details

3. Review the Job details (A)
4. Review the offer details (B)
5. Confirm the position information; if there are multiple positions in the recruitment, make sure the correct one is selected (C)

Please note: If the position you select is in a different classification or grade/rank than the original position, you may have to update the Salary Range/Grade in the Budget Details section.

Job details

CSU Working Title: **TEST - Faculty PT Pool (Julia's Test job).**

Position Type: Instructional Faculty - Temporary/Lecturer

Campus: San Jose 

Division: Academic Affairs

College/Program: College of Science

Department: Biological Sciences - 1245

Time Basis: Part Time ▾

Offer details

Approval status: Pending

Recruiter: Julia Chan 

Date entered: Apr 2, 2021, 2:29 pm

Date updated: Apr 2, 2021, 3:14 pm

Application source: Internet - Diversity Jobs [Edit](#)

Positions:

Position no	Type:	Applicant	Application status
<input type="radio"/> Lecturer AY-A Position no: SJ-00001294 ▾	Replacement	-	-
<input type="radio"/> Lecturer AY-A Position no: SJ-00001294 ▾	Replacement	-	
<input checked="" type="radio"/> Lecturer AY-B Position no: SJ-00001384 ▾	New	Cheddar Corgi	Prepare Offer and Upload Transcripts

- Verify and update the Position Details**
6. Verify the job code and hiring type (A)
 7. Enter the Start date and the End date (B)
 8. Verify the FTE and Hours Per Week; verify or select the FLSA Status (all faculty are exempt) (C)
 9. Verify the Mandated Reporter and Conflict of Interest data (D)

Offer details
🔒

POSITION DETAILS

Job Code/Employee Class: 🔍 ✎ A

[Job Code: 2360](#) ▼

Hiring Type: ▾

Start date:* 📅 B

End date if applicable: 📅

Probation End Date: 📅

FTE: C

Hours Per Week: D

FLSA Status: ▾

Union: ▾

Union Language:

Mandated Reporter: ▾

NCAA: Yes No

Sensitive Position: ▾

Conflict of Interest: ▾

Concurrent Hire: Yes No

Rehired Annuitant: Yes No

Verify the Budget Details

1. Ensure the Pay Plan is selected (AY for most faculty; some may be 12-months) (A)
2. Verify the Salary Range/Grade (B) - if the position you chose was in a different range/grade, you are required to change this information to match

Offer details

BUDGET DETAILS

Budget/Chart field/Account string:

Pay Plan: (A)

Pay Plan Months Off:

Salary Range/Grade:* (B)
 Minimum: \$ 5,046.00
 Maximum: \$ 11,197.00
 Pay Frequency:

Anticipated Hiring Range:

Maximum budgeted amount:

Update the Salary and Compensation information

10. Enter the Base Pay Rate (A)
11. Select Monthly as the Unit basis (B)
12. Enter the Monthly Pay (C)

If you are planning to offer relocation or other supplementary compensation, you may key those values here. They can also be added on the letter.

Please note, you do not need to enter or select anything in the Benefits Eligibility section.

SALARY and COMPENSATION

Base Pay Rate:* (A)

Unit basis:* (B)

Monthly Pay: (C)

Annual salary:

Relocation:

Sign on bonus:

Other supplementary compensation:

Salary notes:

Benefits Eligibility

Benefits eligibility is determined based on the appointment. To confirm benefits eligibility please see your benefits office for further details.

Benefits Eligible?: Yes No

Benefit Eligibility Details:

Complete the Faculty/R03 Details

13. Enter the Total Term Pay (A)
 14. Select the Duration of the Appointment (B)
 15. Enter the WTUs and Faculty Fraction (C, D, E)

To assist in calculating the part-time temp information, use the [Compensation Calculators](#) on the UP Website.

FACULTY / R03 DETAILS	
Rank:	<input type="text" value="Select"/>
Service Credit:	<input type="text" value="Select"/>
Start Up Amount:	<input type="text"/>
Duration of Start Up Funds:	<input type="text"/>
Assigned/Release Time (in terms of WTU's):	<input type="text"/>
Duration of Assigned/Released WTU:	<input type="text"/>
Contingent annual salary:	<input type="text"/>
Contingent pay rate:	<input type="text"/>
Term:	<input type="text"/>
Total Term Pay:	<input type="text"/> 
Duration of Appointment:	<input type="text" value="Select"/> 
Weighted Teaching Units (WTU's):	<input type="text"/> 
Faculty Fraction Numerator:	<input type="text"/> 
Faculty Fraction Denominator:	<input type="text"/> 

Enter the Education and License information

1. Use the PS 9.0 Major, Institute and License/ Certification codes file to complete this section (A)
2. Select the candidate's Highest Level of Education (B)
3. Select the candidate's Degree Type (C)
4. Select whether the candidate's degree is the Terminal Degree for Discipline (D)
5. Enter the Date of Completion of the degree (E)
6. Enter the Major Code for the degree; do not enter the name of the degree (F) – if the major code is not in the list, enter in 9999
7. Enter the Institute Code where the degree was earned; do not enter the name of the institute (G) – if the institution where the degree was earned is not in the list, use 888888 for other US institution or 999999 for

EDUCATION and LICENSE VERIFICATION

Please note that you must use the appropriate reference workbook to enter the correct Major, Institute and/or License/Certification code(s) in this section for the data to correctly integrate to PeopleSoft. Each workbook has multiple worksheets. Copy the code from the corresponding workbook and worksheet.

PeopleSoft 9.0 Campuses, use the following:

- [PS 9.0 Major, Institute and License/Certification codes](#) 
- If the appropriate code does not exist in the drop down list or the reference sheets - please follow the Analysis and Recommendations listed in the [Major, License, School Codes Position Paper](#).

CHRS (PeopleSoft 9.2) Campuses, use the following:

- [CHRS PS 9.2 Major, Institute and License/Certification codes](#) 

Highest Level of Education: 

Degree Type: 

Terminal Degree for Discipline: Yes No 

Date of Completion: 

Major Code: 

Institute Code: 

License/Certification Code: 

License/Certification Number: 

License/Certification Expiry Date: 

<p>international institution</p> <p>8. When applicable, enter the License or Certification Code for the candidate (H)</p> <p>9. Enter the number of the license or certificate (I)</p> <p>10. Enter the expiration date of the license or certification (J)</p> <p><i>Please note, if you enter a Major Code you must enter an Institute Code and vice versa. If you enter a License/Certification Code you must enter a License/Certification Number and vice versa.</i></p>	
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Enter the Onboarding information

The Employment Checks section is not used (A).

Before completing the Onboarding section, please review the [Offer Card Guidance](#) job aid.

- 16. Select the Offer Type (B)
- 17. Select the Pay Group (C); for AY faculty, this should be ACD; for 12-month faculty, this should be MST
- 18. Select SJ as the Offer Approval Type (D)
- 19. Select Base New Employee Data Form_V2020 as the Onboarding Form (E); *Important: this is not required for current employees*
- 20. Select SJ Onboarding Portal as the Onboarding Portal (F); *Important: this is not required for current employees*
- 21. Select the correct Onboarding workflow (G) Please note, this selection will start the I-9 process once the

EMPLOYMENT CHECKS

PRE-EMPLOYMENT CHECKS

Background Check: Yes No

Background Check Codes: A

Pre-placement physical: Yes No

ONBOARDING

OfferType:* B

Pay Group:* C

Offer Approval Type:* D

Onboarding Form: E

Onboarding Portal: F

Onboarding workflow: G

Reports To:* H

Onboarding Delegate 1: I

Onboarding Delegate 2: J

Onboarding Delegate 3: K

<p>candidate accepts the offer in CHRS Recruiting; <i>Important: this is not required for current employees</i></p> <p>22. Verify the Reports To information and update if necessary (H); this person will be responsible for the onboarding of the employee</p> <p>23. If someone else will manage the employee's onboarding processes, enter them as the Onboarding delegate(s) (I, J, K)</p> <p><i>Please note, if you change the Reports To information it will not feed to PeopleSoft. You must submit a Position Management Action Form to update the position.</i></p>	
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Enter Verbal Offer information if desired

24. The Verbal Offer information is optional but may be entered if you wish to track the information (A)

25. The date the candidate accepts or declines the offer will be updated by the system (B)

Offer details

OFFER PROGRESS

The following fields will require manual updates

Verbal offer extended: Yes No **A**

Date verbal offer extended:

Verbal offer accepted: Yes No

Date verbal offer accepted:

The following fields will be automatically updated by the system

Offer accepted: Yes No

Date offer accepted: **B**

Offer declined: Yes No

Date offer declined:

Manage the Offer documents

26. If you have the required transcripts for the candidate, you may click Add document to upload them here (A); they can be uploaded later if need be

27. Click Merge document to create the offer letter (B)

Offer details

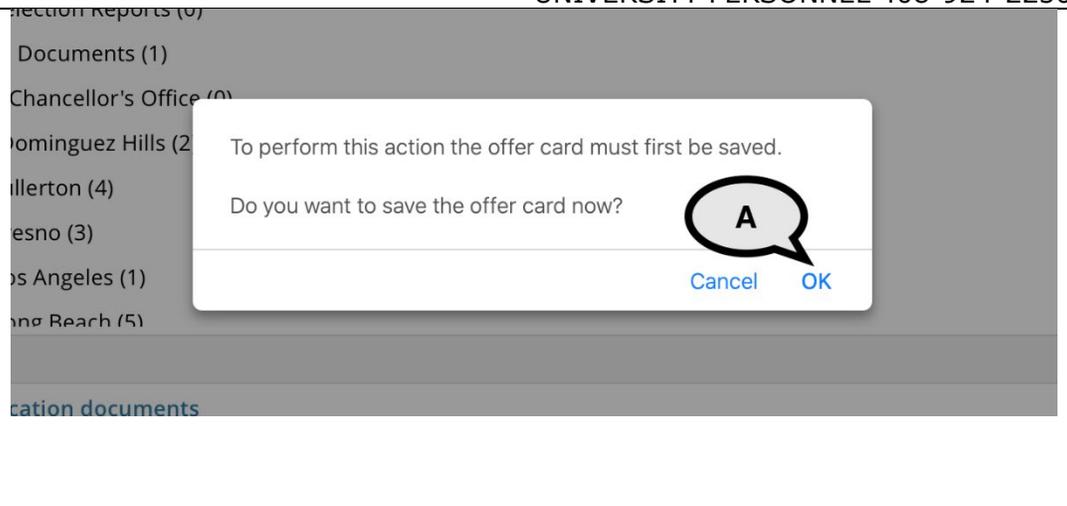
Offer documents

A Document added to the offer application section below.

Add document Merge document **B**

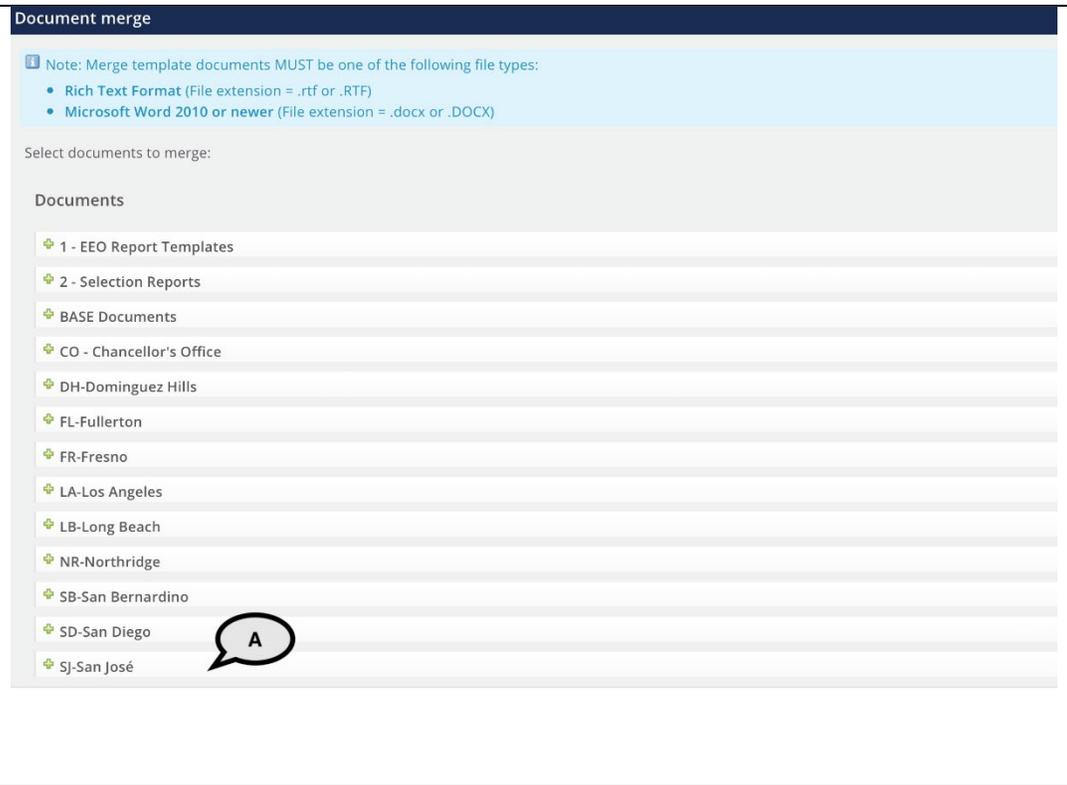
Document	Date	Size	Category
Document library:			
Name	Date	Size	
1 - EEO Report Templates (1)			
2 - Selection Reports (0)			
BASE Documents (1)			
CO - Chancellor's Office (0)			
DH-Dominguez Hills (2)			
FL-Fullerton (4)			
FR-Fresno (3)			
LA-Los Angeles (1)			
LR-Long Beach (5)			

You will be prompted to save the offer card; click OK (A)



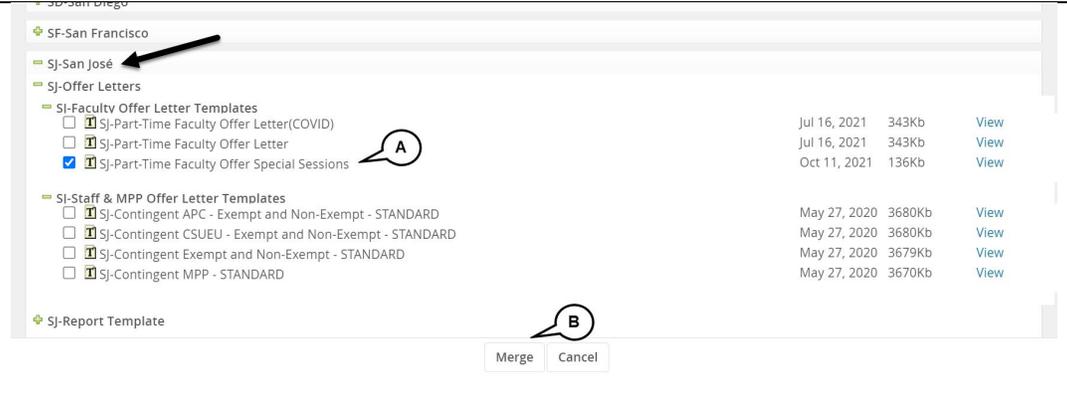
The Document merge window opens

28. Scroll down to find SJ-San Jose (A)



Select the letter type

29. Open SJ-San Jose
30. Open SJ-Officer Letters
31. Open Faculty Offer Letter Templates
32. Select the letter you wish to use (A)
33. Click Merge (B)



Warnings of missing fields may appear

34. Review the Missing merge information (A); return to the offer card to correct if necessary

35. Select Ignore to move forward; missing fields can be updated manually on the letter (B)

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
SJ-TT Faculty Offer Letter	APPLICANTSTREET1* (A) APPLICANTSUBURB* APPLICANTPOSTCODE* OFFERSUPPLEMENTARY_TEXT04 (B) <input type="radio"/> Retry <input type="radio"/> Ignore

You are returned to the offer card

36. The merged letter appears in the document list (A)

37. Click View to download and edit the letter (B)

38. Send the edited offer letter for signatures outside of CHRS Recruiting.

Offer documents

Documents attached to the offer appear in the section below.

Add document - Merge document ?

Document	Date	Size	Category
SJ-TT Faculty Offer Letter	Jul 4, 2020	347Kb	Offer Letter - Non Confidential (B)

View Delete

Document library:

Name	Date	Size
1 - EEO Report Templates (1)		
2 - Selection Reports (0)		
BASE Documents (1)		
CO - Chancellor's Office (0)		
DH-Dominguez Hills (2)		
FL-Fullerton (4)		
FR-Fresno (3)		
LA-Los Angeles (1)		
LB-Long Beach (5)		

Submit the offer card

39. The Offer Check section is not used (A)

40. Confirm that your name is in the Originator field (B)

41. The Approval process-Campus is not used (C)

42. Do not change the application status radio button (D)

43. The Provisioning section is not used (E)

44. Click Submit (F)

The screenshot shows a web form for submitting an offer card. It is divided into several sections:

- Offer Check:** Contains two dropdown menus for 'Add a check group' and 'Add a check type', each with an 'Add' button. Callout A points to the 'Add' button for the check group.
- Approval process - Campus:** Contains an 'Originator*' field with the name 'Carrie Medders' and a search icon. Below it is an 'Email address' field with the value 'sjsu.hrtest@gmail.com'. There is also an 'Approval process - Campus' dropdown menu set to 'None'. Callout B points to the Originator field, and Callout C points to the email address field.
- Application status:** Contains a label 'Update application status following offer:' followed by two radio buttons: 'Yes' and 'No'. Callout D points to the 'No' radio button.
- Provisioning:** Contains a light blue bar with the text 'Click the 'add' button below to add a provisioning item'. Callout E points to this bar.
- Buttons:** At the bottom are three buttons: 'Save and close', 'Submit', and 'Cancel'. Callout F points to the 'Submit' button.

You will receive confirmation that your offer card has been saved

45. Scroll to the bottom of the window then click Save and Close to close the offer card.

The screenshot shows the 'Offer details' section of the application. At the top, there is a dark blue header with the text 'Offer details' and a print icon. Below the header is a green notification bar with a checkmark icon and the text 'Changes have been saved'. Underneath, the name 'Spartan Spartan' is displayed. In the bottom right corner, there is a link for 'Revision history'.

Upload the Signed Offer Letter and Prepare the Packet

The majority of this process is for all types of faculty recruitments. However, the preparation of the packet to send to Employee Support Services is relevant to part-time temp faculty only.

<p>Navigate to the list of applicants and click on applicant name (A); this opens the Applicant Card</p>	<p>Assistant or Associate Professor - Chemical Engineering (498082)</p> <table border="1"> <thead> <tr> <th>Submitted</th> <th>Status</th> <th>Applicant No</th> <th>Pref Name</th> <th>First name</th> <th>Last name</th> </tr> </thead> <tbody> <tr> <td>Mar 11, 2021</td> <td>Prepare Offer and Upload Transcripts</td> <td>74153</td> <td></td> <td>Rachel</td> <td>Greene</td> </tr> <tr> <td>Jan 14, 2021</td> <td>Phone/Video Interview Unsuccessful</td> <td>73689</td> <td></td> <td>Alma</td> <td>Knack</td> </tr> <tr> <td>Jan 14, 2021</td> <td>On Campus Interview Evaluation Summary</td> <td>73691</td> <td></td> <td>Bob</td> <td>Cat</td> </tr> </tbody> </table>	Submitted	Status	Applicant No	Pref Name	First name	Last name	Mar 11, 2021	Prepare Offer and Upload Transcripts	74153		Rachel	Greene	Jan 14, 2021	Phone/Video Interview Unsuccessful	73689		Alma	Knack	Jan 14, 2021	On Campus Interview Evaluation Summary	73691		Bob	Cat
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Jan 14, 2021	On Campus Interview Evaluation Summary	73691		Bob	Cat																				
<p>Click on Offer Incomplete (A)</p>	<p>498082 - Assistant or Associate Professor - Chemical Engineering</p> <p>Date submitted: Mar 11, 2021 Applied via: Other job boards Status changed: Mar 16, 2021 Offer: Offer incomplete</p>																								
<p>The Offer Card displays</p>	<p>Changes have been saved</p> <p>Rachel Greene Revision history</p> <p>Personal details</p> <p>Address: 12 High St, San Jose, California 95123, United States Phone: 4081114564 E-mail: sjsu.hrtest+rgreene+test@gmail.com Applicant No: 74153 View profile</p> <p>Current or previous employee details</p> <p>For assistance completing this section, please review the instructions: Employee Profile Link Instructions Job Aid PLEASE NOTE: Once the selection is made and the Offer card is "Saved/Submitted", the selection cannot be edited by system users. In the event of an incorrect selection, do not move forward please contact your Campus Configuration</p>																								
<p>Scroll to the Offer documents section</p> <ol style="list-style-type: none"> Delete the original letter (A) Click Add document to upload the signed offer letter (B) <p><i>Please note, if you did not upload transcripts when the offer was prepared,</i></p>	<p>Offer documents</p> <p>Documents & the offer appear in the section below.</p> <p>Add document - Merge document ?</p> <table border="1"> <thead> <tr> <th>Document</th> <th>Date</th> <th>Size</th> <th>Category</th> </tr> </thead> <tbody> <tr> <td>SJ-TT Faculty Offer Letter</td> <td>Jul 4, 2020</td> <td>347Kb</td> <td>Offer Letter - Non Confidential</td> </tr> </tbody> </table> <p>Document library:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Date</th> <th>Size</th> </tr> </thead> <tbody> </tbody> </table>	Document	Date	Size	Category	SJ-TT Faculty Offer Letter	Jul 4, 2020	347Kb	Offer Letter - Non Confidential	Name	Date	Size													
Document	Date	Size	Category																						
SJ-TT Faculty Offer Letter	Jul 4, 2020	347Kb	Offer Letter - Non Confidential																						
Name	Date	Size																							

<p><i>you should upload them now.</i></p>											
<p>Upload the signed offer letter</p> <ol style="list-style-type: none"> 3. Click Upload file to find the document (A) 4. Select Offer Letter – Non Confidential for the Document category (B) 5. Give the document a title if desired (C) 6. Click Save and close (D) 											
<p>The new letter appears in the Offer documents section (A)</p>	<table border="1"> <thead> <tr> <th>Document</th> <th>Date</th> <th>Size</th> <th>Category</th> <th></th> </tr> </thead> <tbody> <tr> <td>S Spartan Signed Offer Letter</td> <td>Jul 4, 2020</td> <td>351Kb</td> <td>Offer Letter - Non Confidential</td> <td>View Delete</td> </tr> </tbody> </table>	Document	Date	Size	Category		S Spartan Signed Offer Letter	Jul 4, 2020	351Kb	Offer Letter - Non Confidential	View Delete
Document	Date	Size	Category								
S Spartan Signed Offer Letter	Jul 4, 2020	351Kb	Offer Letter - Non Confidential	View Delete							
<p>Save and Close the Offer Card</p> <p>The next part will show you how to prepare the packet.</p>											

You are returned to the list of applicants – Open the Applicant Card for your candidate

7. Click the hyperlinked first or last name (A)

Assistant Professor - Steyer (497062)

Search Results

Select Submitted Status Applicant No Pref Name First name Last name

Jun 21, 2020	Formal Offer Extended	39968	Christine	Son
Jun 25, 2020	New Application	40055	Tester	Testy
Jun 25, 2020	Offer Accepted Paperwork Received	40056	Sparty	Spartan
Jun 21, 2020	Phone/Video Interview Unsuccessful	39967	Adi	Alsaid

The Applicant Card is displayed

8. For some applicants you may see multiple jobs listed under the Applications tab; take action only on the job you are managing (A)

9. Click the ... menu to review the options (B)

Christine Son

View profile Add flags

Address California United States Phone -

E-mail sjsu.hrtest+062219@gmail.com Applicant No 39968

Employment status - Original source Diverse Issues

e-Zines comms hold Yes

Applications History Scheduled emails CRM Resume / CV

497062 - Assistant Professor - Steyer

Date submitted Jun 21, 2020 Applied via Diverse Issues Status changed Jul 7, 2020 Formal Offer Extended Offer No offer

Resume / CV View Form View Add flags

Prepare the hiring packet

10. Click Compile and send (A)

Applications History Scheduled emails CRM Resume / CV

497062 - Assistant Professor - Steyer

Date submitted Jun 21, 2020 Applied via Diverse Issues Status changed Jul 7, 2020 Formal Offer Extended Offer No offer

Resume / CV View Form View Add flags

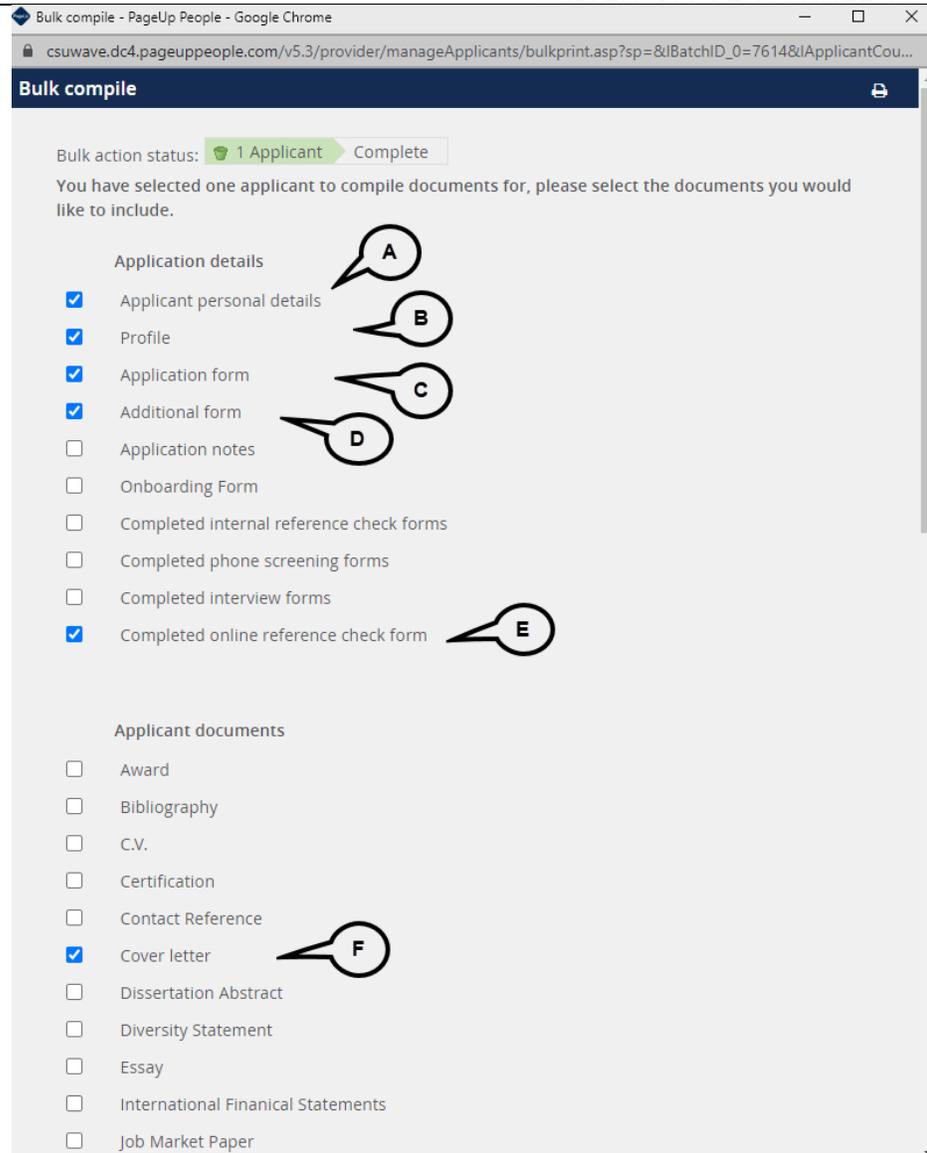
- Add document
- Add document from file
- Add note
- Assign application
- Change Ranking
- Communicate
- Compile and send
- New booking to an existing event
- New booking to a new event
- New task/reminder
- New form

**Document selection
screen appears**

If your applicant's Letters of Recommendation were collected by the system (Letter of Recommendation (automatic)) proceed to step **A1** below. If your applicant's Letters of Recommendation were collected outside of the system and were uploaded manually (Letter of recommendation (manual)) proceed to step **A2**.

A1. Click on the following selections if the Letters of Recommendation were collected by the system:

1. Applicant personal details (A)
2. Profile (B)
3. Application form (C)
4. Additional form (D)
5. Completed online reference check form (E)
6. Cover Letter (F)
7. Letter of Recommendation (G)
8. Offer Letter – Non-confidential (H)
9. Resume (I) *Omit if concurrent hire*
10. Transcripts (J) *Omit if concurrent hire*
11. Click "Create PDF" (K) then proceed to



p.26 – Compile
Screen Displays

- Letter of Recommendation 
- Licensure
- List of courses taught
- Media File
- Nomination Letter
- Non-Confidential Letter of Recommendation or Evaluation
- Offer Letter
- Offer Letter - Non-Confidential 
- Other - Applicant
- Other Document
- Peer Evaluations
- Personal Statement
- Position Description Offered
- Professional Portfolio
- Proposal
- Research Plan
- Resume 
- Student Evaluations
- Summative Assessment
- Supporting Applicant documents
- Syllabus
- Teaching Certification
- Teaching Portfolio
- Teaching Statement
- Transcripts 
- Writing Sample

Recruiter documents

- Interview Notes
- Mail matcher document
- Medical
- Other - Recruiter
- Other Recruitment Documents
- Test results

Print options

- Format for double-sided printing 

Create PDF

Cancel

A2. Click on the following selections if you manually uploaded Letters of Recommendation:

1. Applicant personal details (A)
2. Profile (B)
3. Application form (C)
4. Additional form (D)
5. Cover Letter (E)
6. Letter of Recommendation (F)
7. Offer Letter – Non-confidential (G)
8. Resume (H) *Omit if concurrent hire*
9. Transcripts (I) *Omit if concurrent hire*
10. Click "Create PDF" (J)

The screenshot shows a web browser window titled "Bulk compile - PageUp People - Google Chrome". The URL is "csuwave.dc4.pageuppeople.com/v5.3/provider/manageApplicants/bulkprint.asp?sp=&lBatchID_0=7614&lApplicantCou...". The page header is "Bulk compile". Below the header, it says "Bulk action status: 1 Applicant Complete". A message reads: "You have selected one applicant to compile documents for, please select the documents you would like to include." There are two sections: "Application details" and "Applicant documents".

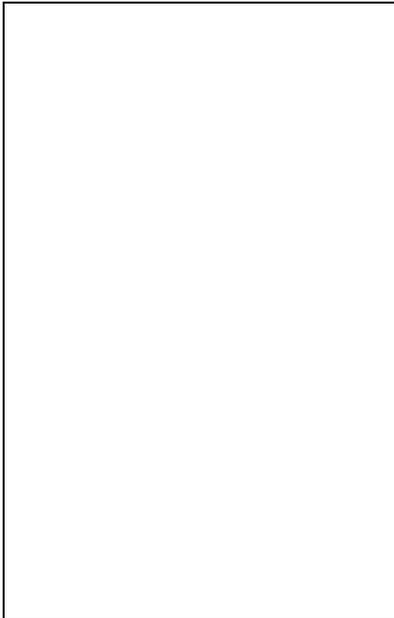
Application details:

- Applicant personal details (A)
- Profile (B)
- Application form (C)
- Additional form (D)
- Application notes
- Onboarding Form
- Completed internal reference check forms
- Completed phone screening forms
- Completed interview forms
- Completed online reference check form

Applicant documents:

- Award
- Bibliography
- C.V.
- Certification
- Contact Reference
- Cover letter (E)
- Dissertation Abstract
- Diversity Statement
- Essay
- International Financial Statements
- Job Market Paper

	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Letter of Recommendation F<input type="checkbox"/> Licensure<input type="checkbox"/> List of courses taught<input type="checkbox"/> Media File<input type="checkbox"/> Nomination Letter<input type="checkbox"/> Non-Confidential Letter of Recommendation or Evaluation<input type="checkbox"/> Offer Letter<input checked="" type="checkbox"/> Offer Letter - Non-Confidential G<input type="checkbox"/> Other - Applicant<input type="checkbox"/> Other Document<input type="checkbox"/> Peer Evaluations<input type="checkbox"/> Personal Statement<input type="checkbox"/> Position Description Offered<input type="checkbox"/> Professional Portfolio<input type="checkbox"/> Proposal<input type="checkbox"/> Research Plan<input checked="" type="checkbox"/> Resume H<input type="checkbox"/> Student Evaluations<input type="checkbox"/> Summative Assessment<input type="checkbox"/> Supporting Applicant documents<input type="checkbox"/> Syllabus<input type="checkbox"/> Teaching Certification<input type="checkbox"/> Teaching Portfolio<input type="checkbox"/> Teaching Statement<input checked="" type="checkbox"/> Transcripts I<input type="checkbox"/> Writing Sample
--	---



Recruiter documents

- Interview Notes
- Mail matcher document
- Medical
- Other - Recruiter
- Other Recruitment Documents
- Test results

Print options

- Format for double-sided printing



Compile Screen Displays

You will see this screen appear and will compile the documents you requested. It may take several minutes to process.

Note: On this screen, no action is needed

Creating document 

Bulk action status: ✔ 1 Applicant Complete

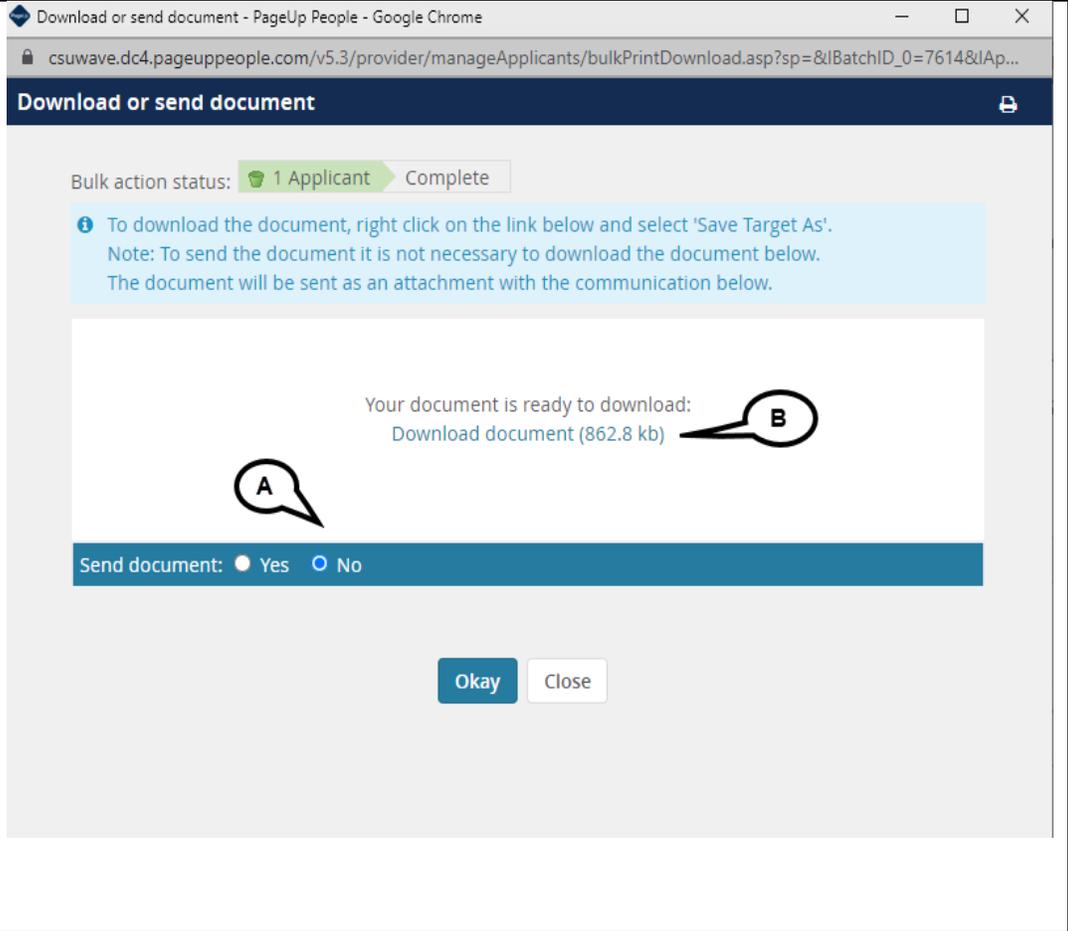
5	0	5
Documents Processed	Warnings	Successful

Currently processing Juliatoo Chan (Julia) (Application documents)

Download or Send Document Screen Displays

At this screen, choose **No** for Send document (A).

Always download document to your local drive by clicking on Download Document (B)

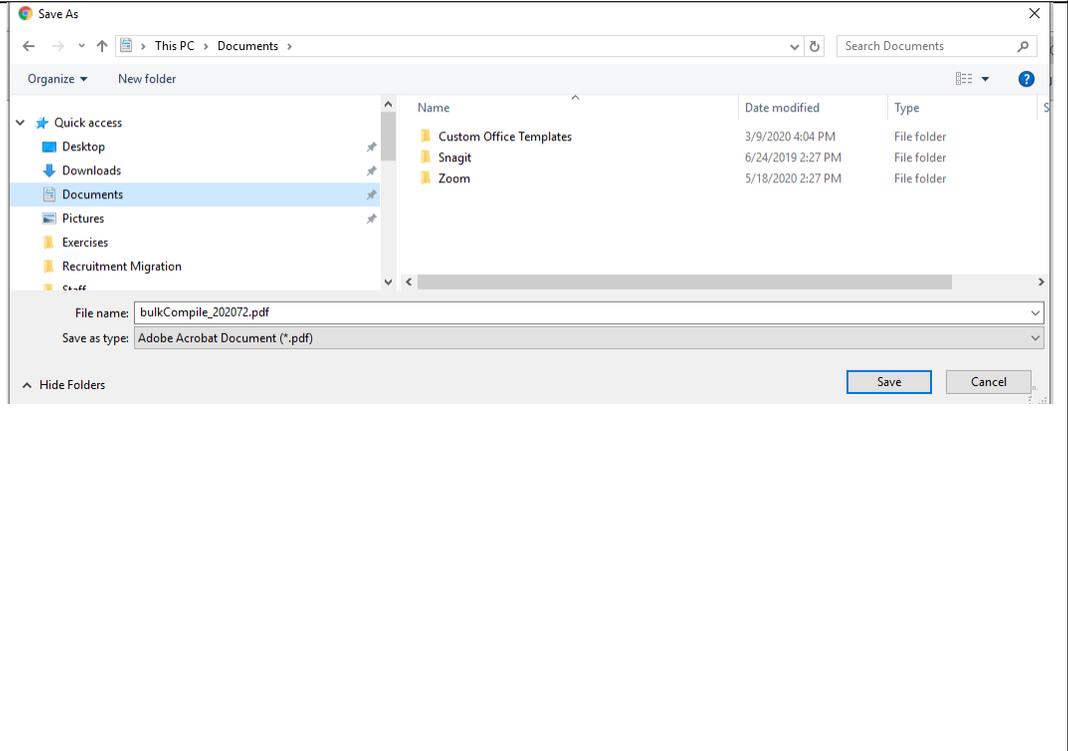


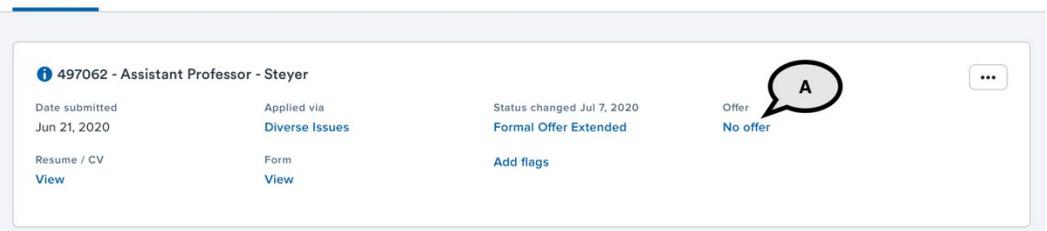
Save As Screen will appear for download

11. Note the location of where you download the document

12. Your document is now ready for review

Please note: Review the compiled file in detail to ensure all documents are present. Delete any blank pages. If transcripts page(s) show with security restrictions, please review Appendix D to insert them



<p><i>manually into the compile file.</i></p>	
<p>Return to the offer card</p> <p>13. Click the offer on the applicant card (A)</p> <p>14. You will be returned to the offer card</p> <p>15. Scroll to the bottom of the card to submit the offer</p>	 <p>The screenshot shows an applicant card for '497062 - Assistant Professor - Steyer'. At the top, there are navigation tabs: 'Applications' (selected), 'History', 'Scheduled emails', 'CRM', and 'Resume / CV'. The card content includes: <ul style="list-style-type: none"> Date submitted: Jun 21, 2020 Applied via: Diverse Issues Status changed Jul 7, 2020: Formal Offer Extended Offer: No offer (with a speech bubble icon containing 'A') Resume / CV: View Form: View Add flags </p>

Extend the Final Offer

<p>Navigate to the list of applicants</p>	<p>Assistant Professor - Steyer (497062)</p> <p>Search Results</p> <p>Select Submitted Status Applicant No Pref Name First name Last name</p> <table border="1"> <tr> <td>Jun 25, 2020</td> <td>New Application</td> <td>40055</td> <td>Tester</td> <td>Testy</td> </tr> <tr> <td>Jun 21, 2020</td> <td>Phone/Video Interview Unsuccessful</td> <td>39967</td> <td>Adi</td> <td>Alsaid</td> </tr> <tr> <td>Jun 21, 2020</td> <td>Prepare Offer and Upload Transcripts</td> <td>40056</td> <td>Christine</td> <td>Son</td> </tr> <tr> <td>Jun 25, 2020</td> <td>Prepare Offer and Upload Transcripts</td> <td>40056</td> <td>Sparty</td> <td>Spartan</td> </tr> </table>	Jun 25, 2020	New Application	40055	Tester	Testy	Jun 21, 2020	Phone/Video Interview Unsuccessful	39967	Adi	Alsaid	Jun 21, 2020	Prepare Offer and Upload Transcripts	40056	Christine	Son	Jun 25, 2020	Prepare Offer and Upload Transcripts	40056	Sparty	Spartan
Jun 25, 2020	New Application	40055	Tester	Testy																	
Jun 21, 2020	Phone/Video Interview Unsuccessful	39967	Adi	Alsaid																	
Jun 21, 2020	Prepare Offer and Upload Transcripts	40056	Christine	Son																	
Jun 25, 2020	Prepare Offer and Upload Transcripts	40056	Sparty	Spartan																	
<p>Move the candidate to the new status</p> <ol style="list-style-type: none"> Select Formal Offer Extended from the status list (A) Click Next (B) 	<p>Change application status</p> <ul style="list-style-type: none"> Phone/Video Interview Invite Phone/Video Interview Accepted Phone/Video Interview Declined Phone/Video Interview Evaluation Summary Phone/Video Interview Successful (Send: RC&BR Form) Phone/Video Interview Successful (DO NOT SELECT-Completed: RC&BR Form) Phone/Video Interview Unsuccessful On Campus Interview Invite On Campus Invite Accepted On Campus Invite Declined On Campus Interview Evaluation Summary On Campus Interview Successful On Campus Interview Unsuccessful Background Check Initiated outside of CHRS Recruiting Background Check Initiated in CHRS Recruiting Background Check Pending Processing - DO NOT SELECT - SYSTEM STATUS ONLY Background Check Pending Adjudication - DO NOT SELECT - SYSTEM STATUS ONLY Background Check Unsuccessful Prepare Offer and Upload Transcripts Formal Offer Extended Formal Offer Accepted-DO NOT SELECT-SYSTEM STATUS ONLY Offer Accepted Paperwork Received-DO NOT SELECT-SYSTEM STATUS ONLY Formal Offer Declined Job Closing Communication Offer Rescinded Recruitment Cancelled <p>Submit Next > Cancel</p>																				

<p>Confirm the status change and notify the candidate</p> <p>You will be prompted that the offer has not been approved (A). Since we are not doing offer approvals in the system, you may ignore this.</p> <p>You will also see a message reminding you that the candidate will be notified at this step (B).</p> <ol style="list-style-type: none"> 1. Review the email and update if necessary (C) 2. Click Move Now (D) <p><i>Please note: If prompted to change the job status, do not change it. It should only be changed for tenure-track or FT Temp recruitments.</i></p>	
<p>You are returned to the offer card. You can do a final review of all the data and update if needed.</p>	

**Submit the offer card
(A)**

Application documents

Documents uploaded by the applicant are displayed in blue.
Documents belonging to a different application are marked with an asterisk (*).

Title	Size	Category	
SJ-TT Faculty Offer Letter	347Kb	Offer Letter - Non Confidential	View

Page 1 of 1 Records 1 to 1 of 1

A

**The application status
has been updated (A)**

Assistant Professor - Steyer (497062)

Search Results

Select Submitted Status

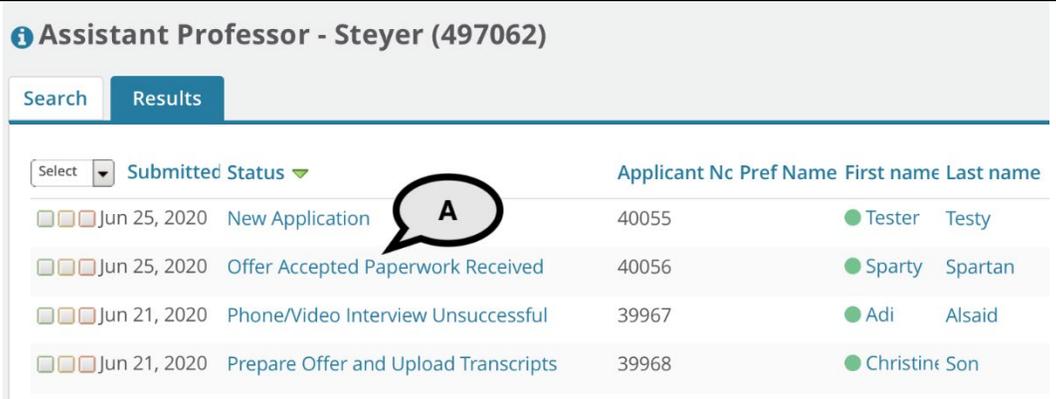
	Submitted Status	Applicant No	Pref Name	First name	Last name
<input type="checkbox"/>	Jun 25, 2020 Formal Offer Extended	40056		Sparty	Spartan
<input type="checkbox"/>	Jun 25, 2020 New Application	40055		Tester	Testy
<input type="checkbox"/>	Jun 21, 2020 Phone/Video Interview Unsuccessful	39967		Adi	Alsaid
<input type="checkbox"/>	Jun 21, 2020 Prepare Offer and Upload Transcripts	39968		Christine	Son

A

Candidate View and Acceptance of Offer

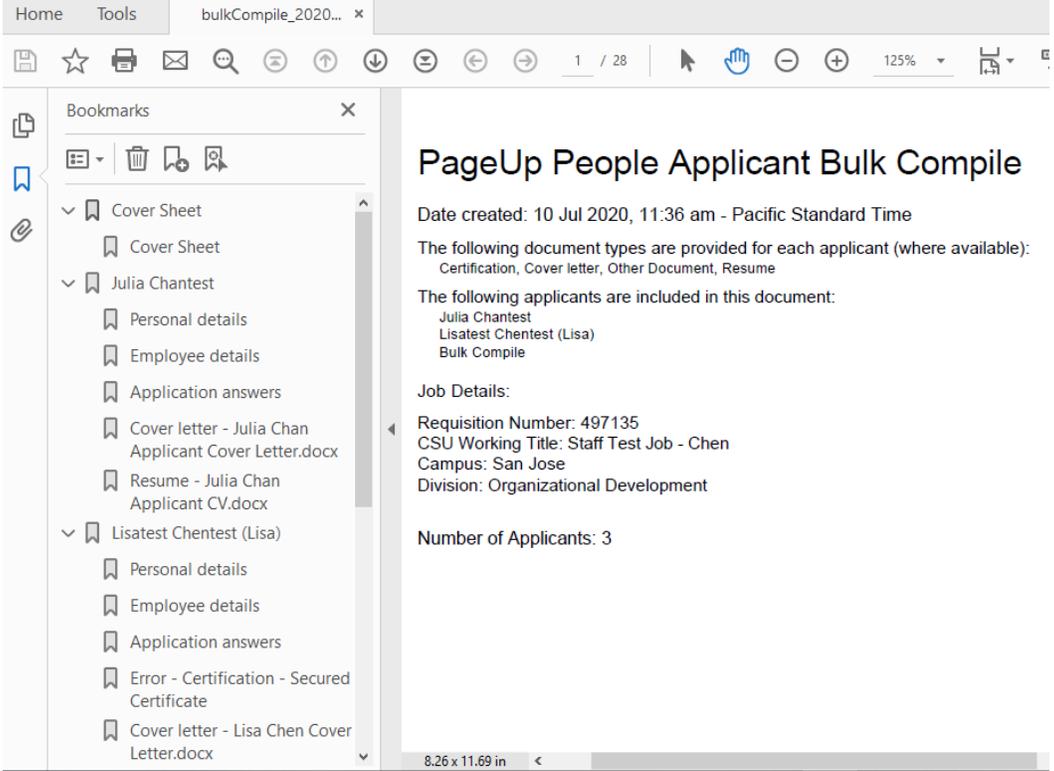
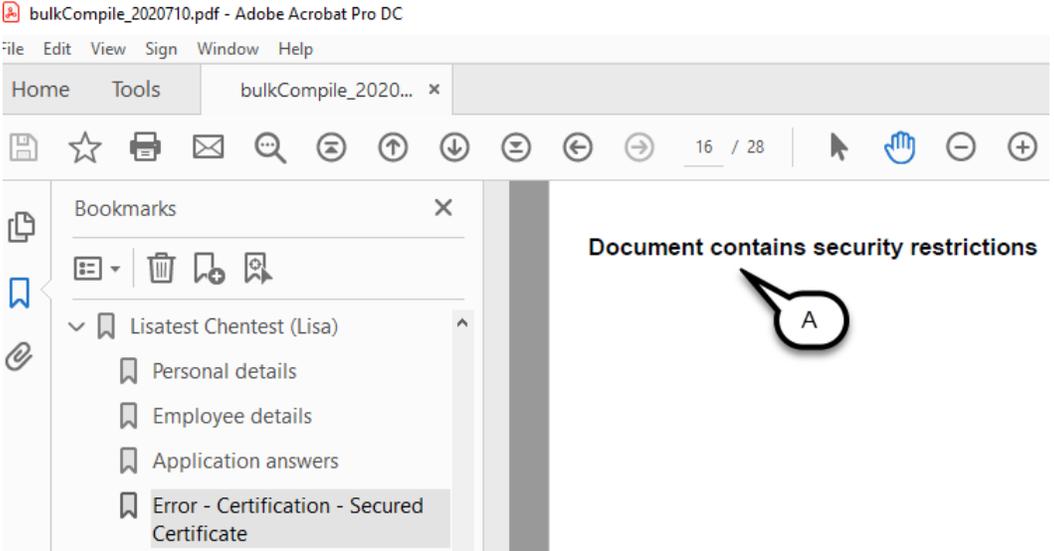
The information in this section is what the candidate will see when they login to review and accept their offer.

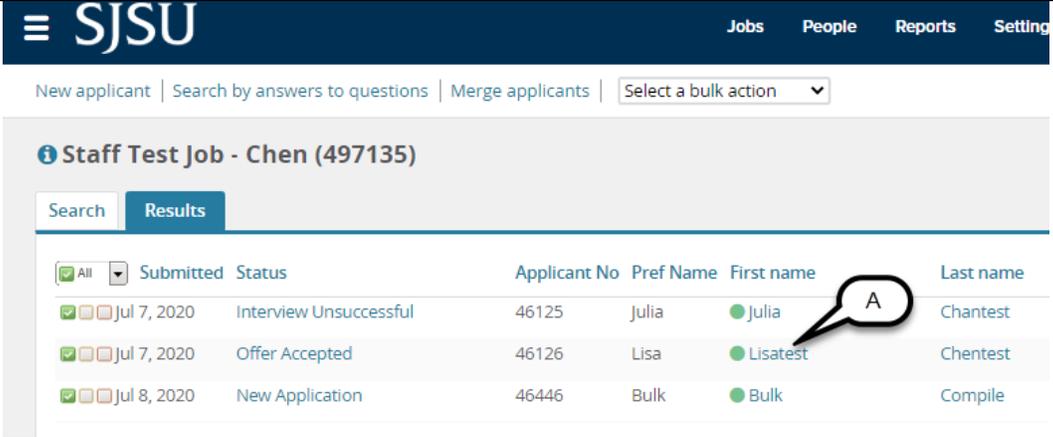
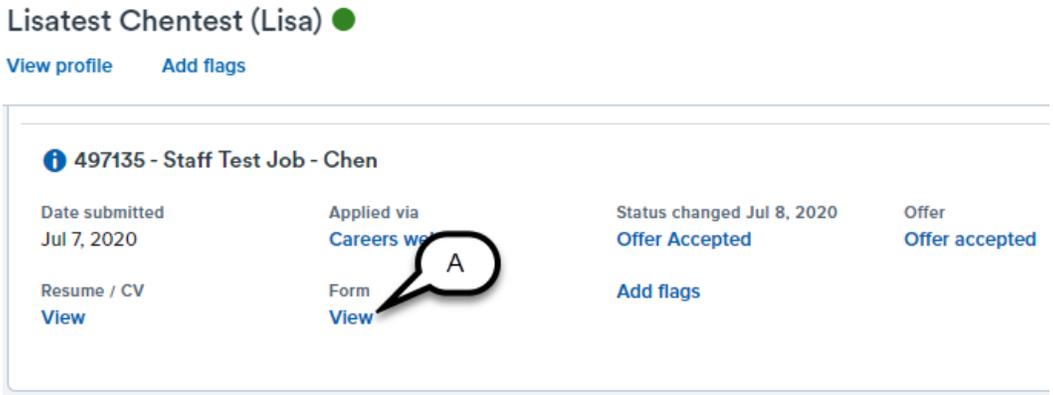
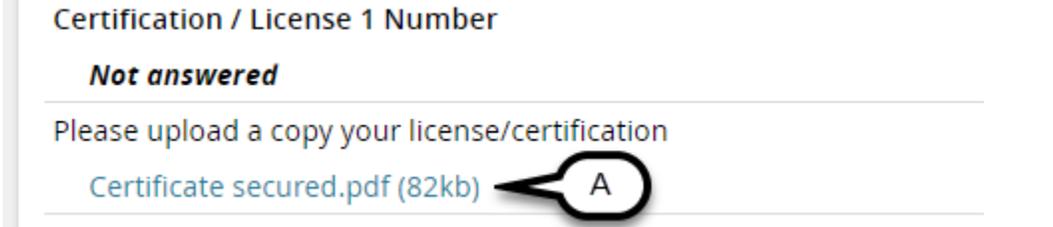
<p>View the offer</p> <ol style="list-style-type: none"> The candidate will see a highlighted box with a link to view the offer (A) 	<p>Welcome Sparty Home Update profile Update resumé Account</p> <p>A</p> <p>You have been made an employment offer for your Assistant Professor - Steyer application. View Offer</p> <p>Below you will find information regarding jobs to which you have applied. You may also update your profile information and/or change your password.</p> <p>Incomplete applications You have no incomplete applications.</p> <p>Submitted applications</p> <ul style="list-style-type: none"> Assistant Professor - Steyer (497062) View application San Jose Application submitted 25 Jun 2020 at 2:57pm PST. Current status: Offer extended
<p>Accept the offer</p> <ol style="list-style-type: none"> The candidate sees a message letting them know they are required to view the letter to accept the offer (A) The candidate clicks the link to download the offer letter (B) The candidate must check that they agree to the terms of the offer (C) The candidate must push the I AGREE button; it will display once the letter is downloaded AND the checkbox is checked (D) <p>Once they agree to the offer, if applicable, they will be prompted to complete the Base New Hire Data Form.</p>	<p>Employment offer</p> <p>A</p> <p>You must read and agree to the terms of the offer before you can accept or decline the offer.</p> <p>Congratulations, you have been made an employment offer for your Assistant Professor - Steyer application. Please review the following documents before accepting or declining your offer.</p> <p>Once you have accepted your offer, it can be retrieved again from within the "view application" link of the job.</p> <p>Spartan Signed Offer Letter B</p> <p>By clicking "I AGREE", I acknowledge:</p> <p><input type="checkbox"/> C</p> <p>That I have read and agree to the terms of the Offer, including the Position Description. Furthermore, by clicking "I accept," I agree that I am applying my electronic signature to this document, and that I am signing the document electronically. I agree that this electronic signature is legally equivalent to my manual signature on the document, and that I consent to be legally bound by the terms of the document. No third party will be required to verify or validate in any way my electronic signature, and the lack of any such verification or validation will in no way effect the enforceability of my electronic signature.</p> <p>D I AGREE I decline Back to home</p> <p>If you are unable to open these documents, please download Adobe Acrobat reader by clicking on this icon.</p> <p>Get Adobe Reader</p>

<p>The application status is updated once the offer is accepted and the base form is completed. (A)</p> <p><i>Please note, for current employees who do not complete the Base New Hire Data Form, this status will be updated when they accept the offer.</i></p>	 <p>Assistant Professor - Steyer (497062)</p> <p>Search Results</p> <p>Select Submitted Status</p> <table border="1"> <thead> <tr> <th>Applicant No</th> <th>Pref Name</th> <th>First name</th> <th>Last name</th> </tr> </thead> <tbody> <tr> <td>40055</td> <td>Tester</td> <td>Testy</td> <td></td> </tr> <tr> <td>40056</td> <td>Sparty</td> <td>Spartan</td> <td></td> </tr> <tr> <td>39967</td> <td>Adi</td> <td>Alsaid</td> <td></td> </tr> <tr> <td>39968</td> <td>Christine</td> <td>Son</td> <td></td> </tr> </tbody> </table>	Applicant No	Pref Name	First name	Last name	40055	Tester	Testy		40056	Sparty	Spartan		39967	Adi	Alsaid		39968	Christine	Son	
Applicant No	Pref Name	First name	Last name																		
40055	Tester	Testy																			
40056	Sparty	Spartan																			
39967	Adi	Alsaid																			
39968	Christine	Son																			
<p>Integration process begins.</p> <p>6. Let your college analyst that your applicant is ready for PS integration. This is when the Personal Data and POI data will be created for new employees or updated for returning employees.</p>																					

APPENDIX A: Secure Documents Download

Occasionally, you may come across a secure document that will not compile when you do the bulk compile function. The steps below show you how to manually download the document. The document can then be replaced in the bulk PDF file.

<p>1. Open the downloaded PDF document and search for any secured documents.</p>	
<p>2. When a document is secured, the Bulk Compile function will not be able to extract the information and you will see "Document contains security restrictions". (A)</p>	

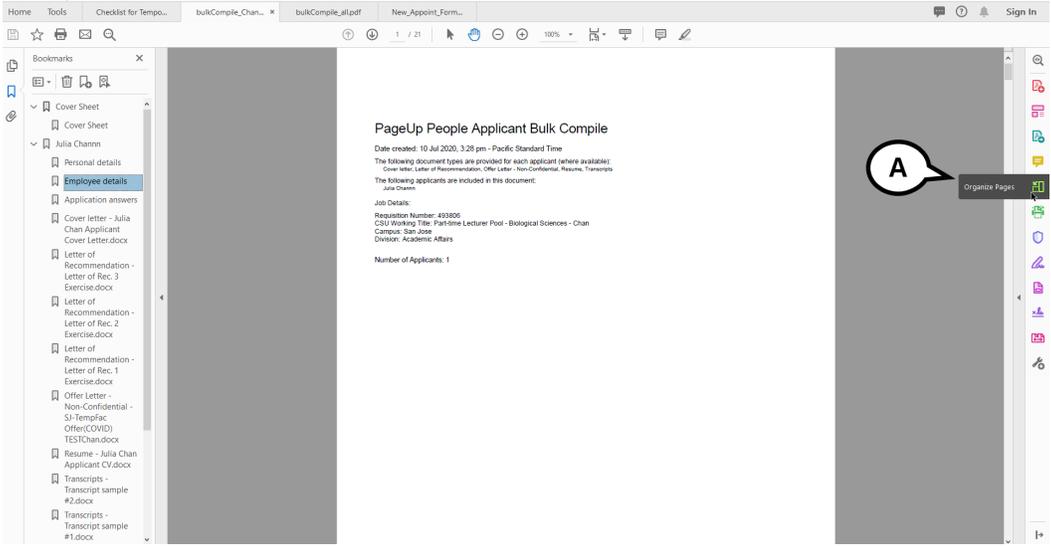
<p>3. To separately download a secured document, click on the applicant name to open up the applicant card (A)</p>	 <p>SJSU Jobs People Reports Settings</p> <p>New applicant Search by answers to questions Merge applicants Select a bulk action</p> <p>Staff Test Job - Chen (497135)</p> <p>Search Results</p> <table border="1"> <thead> <tr> <th><input checked="" type="checkbox"/> All</th> <th>Submitted</th> <th>Status</th> <th>Applicant No</th> <th>Pref Name</th> <th>First name</th> <th>Last name</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Jul 7, 2020</td> <td>Interview Unsuccessful</td> <td>46125</td> <td>Julia</td> <td>Julia</td> <td>Chantest</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Jul 7, 2020</td> <td>Offer Accepted</td> <td>46126</td> <td>Lisa</td> <td>Lisatest</td> <td>Chentest</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Jul 8, 2020</td> <td>New Application</td> <td>46446</td> <td>Bulk</td> <td>Bulk</td> <td>Compile</td> </tr> </tbody> </table>	<input checked="" type="checkbox"/> All	Submitted	Status	Applicant No	Pref Name	First name	Last name	<input checked="" type="checkbox"/>	Jul 7, 2020	Interview Unsuccessful	46125	Julia	Julia	Chantest	<input checked="" type="checkbox"/>	Jul 7, 2020	Offer Accepted	46126	Lisa	Lisatest	Chentest	<input checked="" type="checkbox"/>	Jul 8, 2020	New Application	46446	Bulk	Bulk	Compile
<input checked="" type="checkbox"/> All	Submitted	Status	Applicant No	Pref Name	First name	Last name																							
<input checked="" type="checkbox"/>	Jul 7, 2020	Interview Unsuccessful	46125	Julia	Julia	Chantest																							
<input checked="" type="checkbox"/>	Jul 7, 2020	Offer Accepted	46126	Lisa	Lisatest	Chentest																							
<input checked="" type="checkbox"/>	Jul 8, 2020	New Application	46446	Bulk	Bulk	Compile																							
<p>4. Click View to see the application and uploaded documents (A)</p>	 <p>Lisatest Chentest (Lisa)</p> <p>View profile Add flags</p> <p>497135 - Staff Test Job - Chen</p> <p>Date submitted: Jul 7, 2020 Applied via: Careers website Status changed Jul 8, 2020: Offer Accepted Offer: Offer accepted</p> <p>Resume / CV View Form View Add flags</p>																												
<p>5. Locate the secured document and click on it to start downloading. Once the file is downloaded, you can add it to your bulk compile PDF.</p>	 <p>Certification / License 1 Number</p> <p>Not answered</p> <p>Please upload a copy your license/certification</p> <p>Certificate secured.pdf (82kb)</p>																												

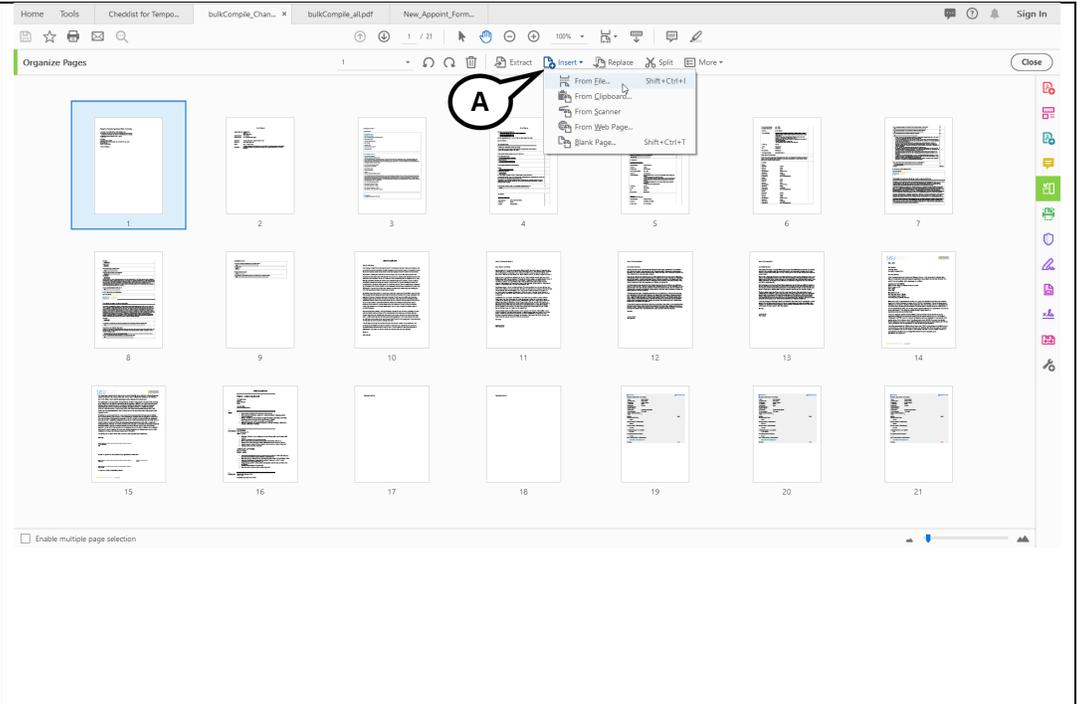
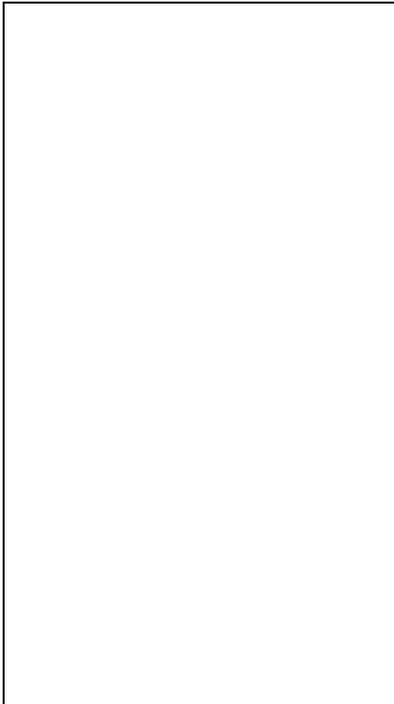
APPENDIX B: Combining the Compile PDF with the PeopleSoft Appointment Form and Checklist

For Part-Time Faculty, you must add the temporary faculty checklist and the PeopleSoft Appointment form to the Compile PDF File. This is done once the following actions are complete:

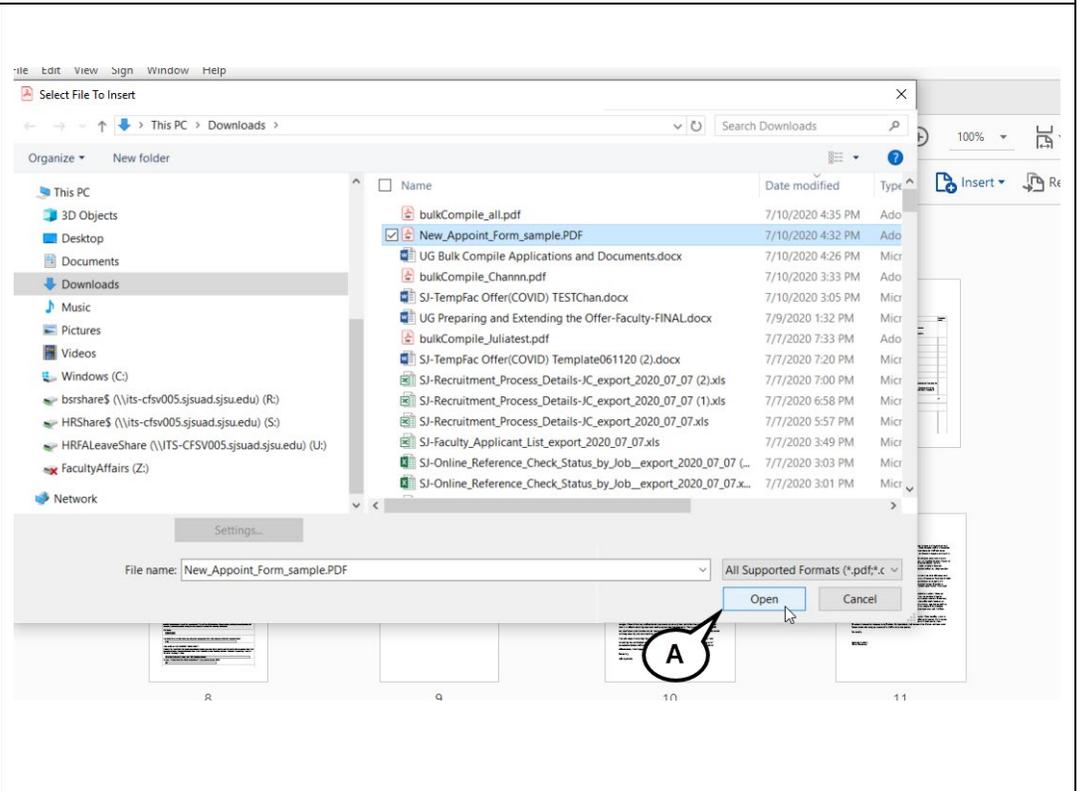
- The Compile PDF file has been created
- The offer is accepted in the system
- The new employee data is in PeopleSoft
- The PeopleSoft Appointment Form has been generated

The PeopleSoft Appointment form and the Compile PDF file need to be combined before sending to Employee Support Services (ESS). Follow the steps below to combine the information.

<p>1. Open the Compile PDF File in your PDF viewer (Acrobat, etc) and click on Organize Pages (A)</p>	
<p>1. Insert the Checklist by clicking on Insert From File (A) 2. Insert the PS Appointment Form by clicking on Insert From File (A)</p>	

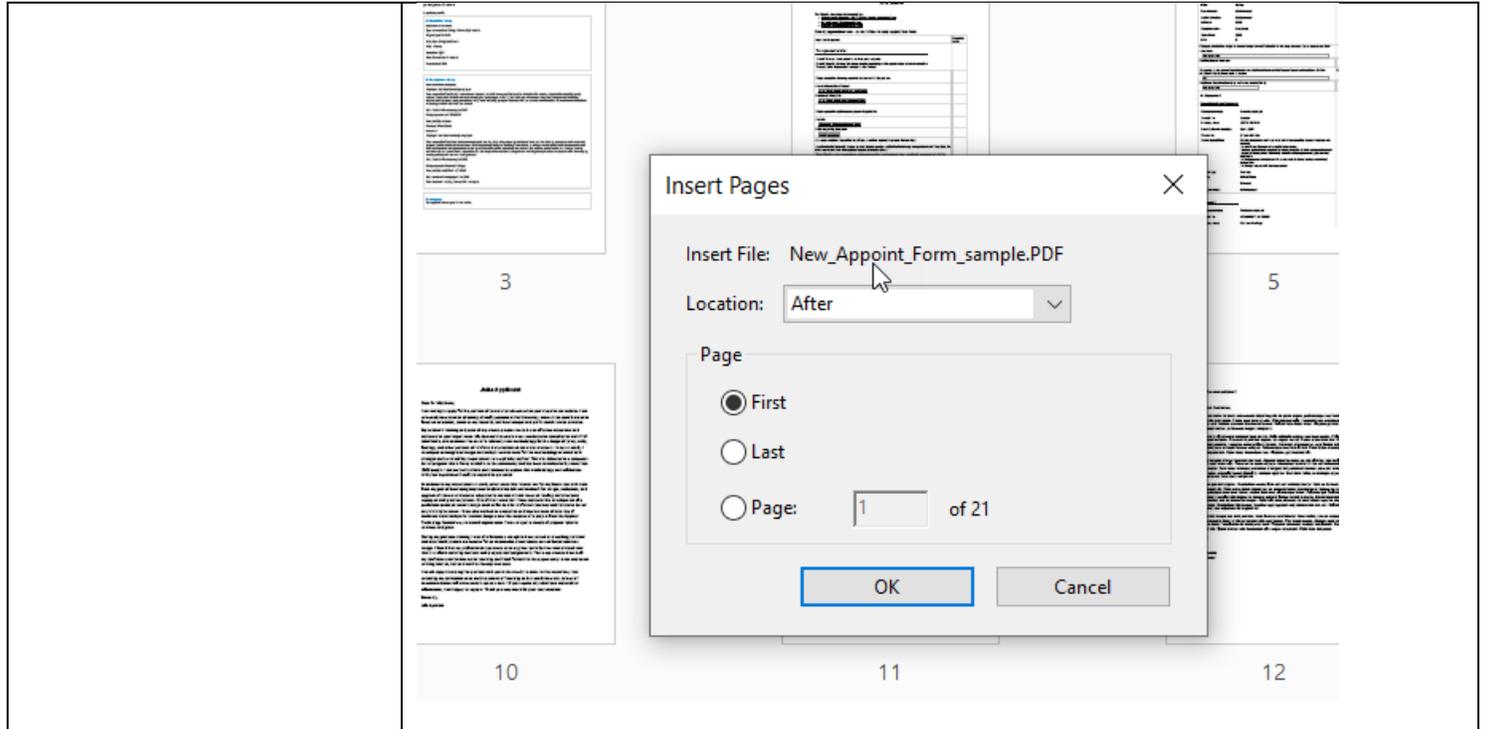


3. Locate where the checklist and the PS Appointment Form are saved and select Open. (A)



4. Insert the page after the first page then select OK.





5. The checklist and the PS Appointment Form will now show up in your Compile PDF File (A). Save.

Bookmarks

- New bookmark
- Cover Sheet
- Julia Channn
 - Appointment form**
 - Personal details
 - Employee details
 - Application answers
 - Cover letter - Julia Chan Applicant
 - Cover Letter.docx
 - Letter of Recommendation - Letter of Rec. 3 Exercise.docx
 - Letter of Recommendation - Letter of Rec. 2 Exercise.docx
 - Letter of Rec.

San Jose State University
Temporary Faculty/Graduate Assistant/Teaching Associate Appointment Form

Appointment Form First Date: 03/05/20
Submit Form to: University Personnel
Questions? Email: tempfaculty_appointments@sjsu.edu

Effective Date	Action*	Reason*	Effective Date	Action*	Reason*
01/21/20	DTA	APT			

Employee ID	Email	Employee Name	Contract Number & Description	Effective Date	Eff Seq
				21-JAN-2020	0

Contract Type	Contract Expected End Date	Multi-Year End Date	Entitlement	Original Hire Date	SSI Counter
999-Senior Appointment	22-MAR-2029			21-AUG-2017	

Current Contract Data		Job Code	Working Title	Sal Plan / Grade	Comp Rate	Actual Comp	WTU	FTE	Fraction
Term	Year	Cycle	Position # / Department Id / Name						

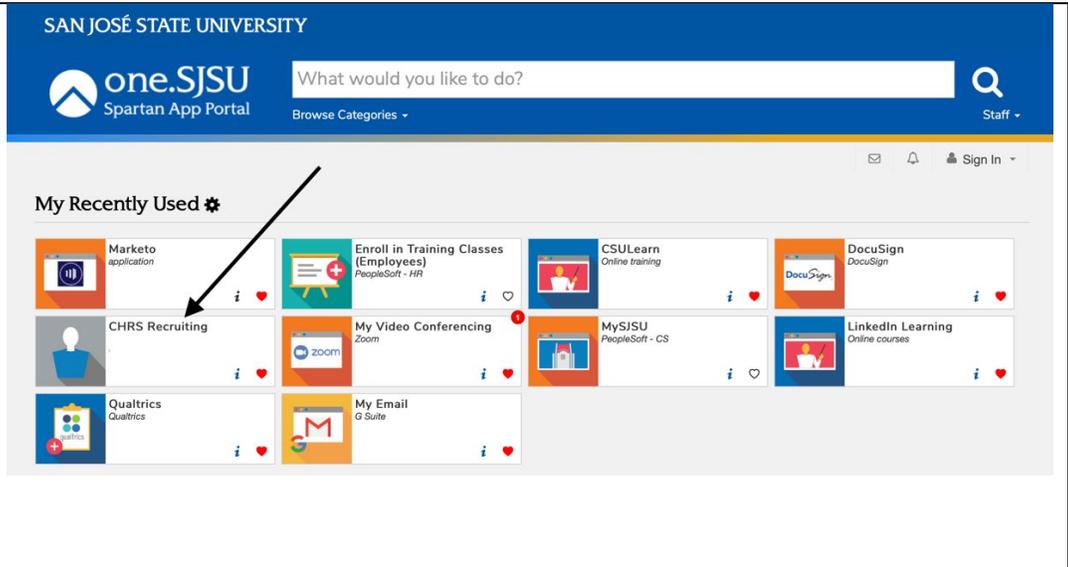
Job History	ERB#	Position	Action/Reason History	Working Title	Dept Name	FTE	Actual Comp	Chg Amt	Chg Pct	Comp Rate
08/19/19	00001480	Termination/End Temporary Appointment	Lecturer AY-C	Civ/Env/Eng	0.266667					
07/01/19	00001480	Pay Rate Change/General Salary Increase	Lecturer AY-C	Civ/Env/Eng	0.266667					
01/22/19	00001480	Data Change/New Temp Appointment	Lecturer AY-C	Civ/Env/Eng	0.266667					

Appendix C: Prepare the Offer (Special Sessions & Summer Sessions)

This section will walk through the process of preparing the offer for Special Sessions and Summer Sessions hires. While the process is similar, there are a few differences with how the data is entered. Once the offer is prepared as outline below, you can continue back to the main document beginning at **Upload the Signed Offer Letter and Prepare the Packet**, page 20.

Log into CHRS Recruiting

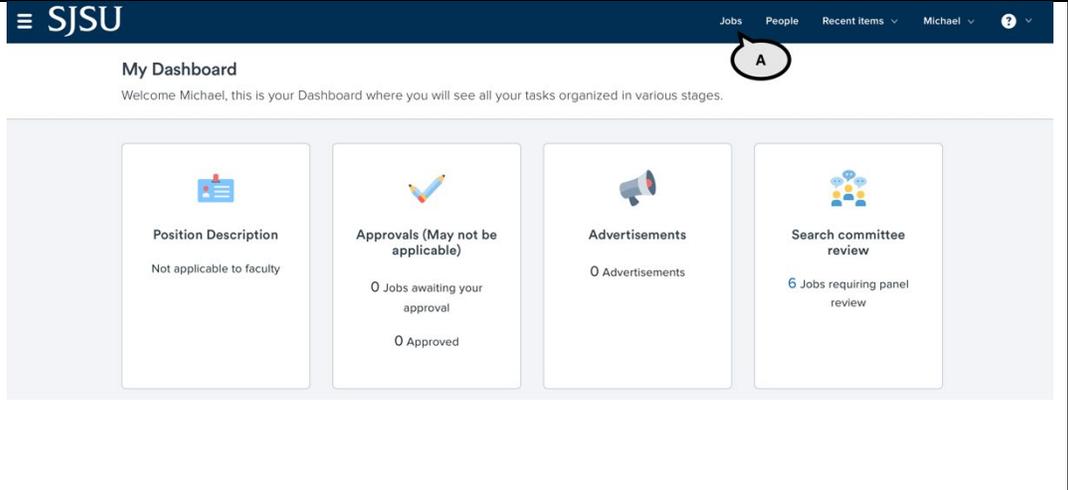
- Navigate to one.SJSU
- Search for or click the CHRS Recruiting tile
- User your SJSUOne ID and password to log in



The Tiled Dashboard is Displayed

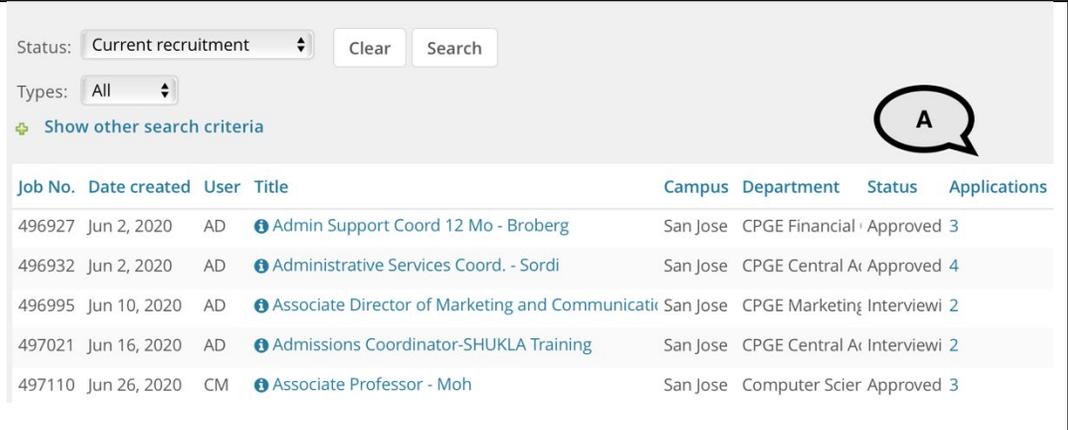
Please note, depending on your role the dashboard will look different.

- From the tiled dashboard, click Jobs (A)



Select the Applications for the Job

- Click the hyperlinked number (A) of applications for the job for which you wish to make an offer



The List Dashboard is Displayed

3. Change the View Total or to Approved Jobs by clicking the appropriate circle (A)
4. Click the hyperlinked number of applications next to the icon of the appropriate job (B)

The screenshot shows the SJSU University Personnel Dashboard. At the top, there are navigation links for 'Jobs', 'People', and 'Reports'. Below this is a 'Current jobs' section with four circular metrics: Total (3), All Notifications (1), Approved (1), and Testing (2). Callout 'A' points to the 'Testing' metric. Below the metrics is a list of jobs. Callout 'B' points to the '3 new' link under the 'Approved' icon for the first job, 'Teacher Ed Lecturer Pool - Summer Session'.

Job Title	Requisition Number	Recruiter	Positions	Vacancies
Teacher Ed Lecturer Pool - Summer Session	505613	Patricia Swanson	1	1
TEST - Faculty PT Pool (Julia's Test job)	497139	Julia Chan	3	3
TESTING FINAL- Tracker I9 & Accurate Integration	498320	Julia Chan	6	6

Whether you navigate from the Tiled or List Dashboard, the list of applicants is displayed

1. Click the Status of the candidate for which you wish to extend an offer (A)

The screenshot shows the applicant list for the 'Teacher Ed Lecturer Pool - Summer Session (505613)'. It includes a search bar and a table of applicants. Callout 'A' points to the 'Status' column of the second applicant, Fred Flintstone.

Select	Submitted	Status	Applicant No	Pref Name	First name	Last name
<input type="checkbox"/>	Oct 11, 2021	New Application	176731		Barney	Rubble
<input type="checkbox"/>	Oct 11, 2021	New Application	176730		Fred	Flintstone
<input type="checkbox"/>	Oct 11, 2021	Background Check Pending Adjudication - DO NOT SELECT - SYSTEM STATUS ONLY	176743		Sammy	Spartan
<input type="checkbox"/>	Oct 11, 2021	New Application	176732		Wilma	Fintstone

Move the Candidate to the Prepare Offer and Upload Transcripts status

7. Select the step in the status list (A)
8. Click Next (B)

Change application status 🖨️

- Phone/Video Interview Invite
- Phone/Video Interview Accepted
- Phone/Video Interview Declined
- Phone/Video Interview Evaluation Summary
- Phone/Video Interview Successful (Send: RC&BR Form)
- Phone/Video Interview Successful (DO NOT SELECT-Completed: RC&BR Form)
- Phone/Video Interview Unsuccessful
- On Campus Interview Invite
- On Campus Invite Accepted
- On Campus Invite Declined
- On Campus Interview Evaluation Summary
- On Campus Interview Successful
- On Campus Interview Unsuccessful
- Background Check Initiated outside of CHRS Recruiting
- Background Check Initiated in CHRS Recruiting
- Background Check Pending Processing - DO NOT SELECT-SYSTEM STATUS ONLY
- Background Check Pending Adjudication - DO NOT SELECT-SYSTEM STATUS ONLY
- Background Check Unsuccessful
- Prepare Offer and Upload Transcripts**
- Formal Offer Extended
- Formal Offer Accepted-DO NOT SELECT-SYSTEM STATUS ONLY
- Offer Accepted Paperwork Received-DO NOT SELECT-SYSTEM STATUS ONLY
- Formal Offer Declined
- Job Closing Communication
- Offer Rescinded
- Recruitment Cancelled

Submit
Next >
Cancel

Confirm the status change

9. No communication will be sent to the candidate at this step (A)
10. If applicable, open the Additional users section and prepare the email (B)
11. If prompted to change the job status, do not change the status; this is only changed for Tenure-Track or Full-Time Temp recruitments
12. Click Move now (D)

Confirm status change

You are about to move Sparty Spartan to a different status:

From status: On Campus Interview Successful
To status: Prepare Offer and Upload Transcripts

Communication template: -- No template --

E-mail: Applicant: Yes No A

No SMS will be sent to the applicant as they do not wish to receive them.

Additional users from Job: Yes No B

Note

The following will be added to the applicant notes for administrators to view:

Update job status from Approved to Offer: Yes No C

Move now Cancel D

The Offer details window opens: Verify the Personal Details

46. Confirm the Address, Phone and Email information (A)

47. If the candidate is a current employee, enter their name in the Employee field (B). If the candidate is new or was a former SJSU employee (no longer active) do NOT enter their name here.

Offer details 🔒

Sparty Spartan

Personal details

Address: California United States Phone:

E-mail: sjsu.hrtest+987654321@gmail.com

Applicant No: 40056

[View profile](#)

Current or previous employee details

ⓘ Please download and read the [instructions](#) before selecting an Employee Profile.

PLEASE NOTE: Once the selection is made and the Offer card is "Saved/Submitted", the selection **cannot be edited** by system users. In the event of an incorrect selection, do not move forward please contact your Campus Configuration Administrator to submit a "High Impact" JIRA ticket, which includes the correct Employee number from your campus' PeopleSoft environment.

Self-disclosed Employee ID (not applicable to CSU):

Employee: 🔍 ✎

No user selected.

Save and close Submit Cancel

Verify the Job and Offer Details

- 48. Review the Job details (A)
- 49. Review the offer details (B)
- 50. Confirm the position information; if there are multiple positions in the recruitment, make sure the correct one is selected (C)

Please note: If the position you select is in a different classification or grade/rank than the original position, you may have to update the Salary Range/Grade in the Budget Details section.

Job details

CSU Working Title: **Teacher Ed Lecturer Pool - Summer Session.**

Position Type: Instructional Faculty - Temporary/Lecturer A

Campus: San Jose

Division: Academic Affairs

College/Program: College of Education

Department: Teacher Education - 1368

Time Basis: Part Time

Offer details

Approval status: Pending B

Recruiter: Remie Bontrager

Date entered: Oct 11, 2021, 11:40 am

Application source: Internet - Alumni [Edit](#)

Positions:

Position no	Type:	Applicant	Application status
<input checked="" type="radio"/> Instr Fac,Summer Session-State Position no: SJ-00006260 C	New	-	-

Verify and update the Position Details

51. Verify the job code and hiring type (A)

52. Select No for Auxilliary Hire (B)

53. Select Temporary for Hiring Type (C)

54. Enter the Start date and the End date (D)

55. Verify the FTE, this is necessary for Special & Summer Sessions (E)

56. While the rest of the fields in this section are optional, you may verify the rest of the details.

POSITION DETAILS

Job Code/Employee Class: A

Job Code: 2457 B

Auxiliary Hire:* Yes No C
Selecting 'Yes' will exclude this new hire from the PeopleSoft Integration file.

Hiring Type: C

Start date:* D

End date if applicable: D

Probation End Date: D

FTE: E

Hours Per Week:

FLSA Status:

Union:

Union Language:

Mandated Reporter:

NCAA: Yes No

Sensitive Position:

Conflict of Interest:

Concurrent Hire: Yes No

Rehired Annuitant: Yes No

**Verify the Budget
Details**

3. Ensure the Pay Plan is selected (AY for most faculty; some may be 12-months, if Lump Sum, select Other) (A)

4. Verify the Salary Range/Grade (B) - if the position you chose was in a different range/grade, you are required to change this information to match. It is not uncommon to pull up a zero dollar range amount for min and max for Special & Summer Session positions.

BUDGET DETAILS	
Budget/Chart field/Account string:	<input type="text"/>
Pay Plan:	Other 
Pay Plan Months Off:	<input type="text"/>
Salary Range/Grade:*	2457-SEMESTER RATE-Grade-1   
	Minimum: \$ 0.00 Maximum: \$ 0.00 Pay Frequency:
Anticipated Hiring Range:	<input type="text"/>
Maximum budgeted amount:	<input type="text"/>

Update the Salary and Compensation information

57. Enter the Base Pay Rate (A)
58. Select Lump Sum as the Unit basis if candidate will only be receiving one paycheck (B)

The rest can remain blank. While you are entering a Base Pay Rate, it will not show on the offer letter. If you are planning to offer relocation or other supplementary compensation, you may key those values here. They can also be added on the letter.

Please note, you do not need to enter or select anything in the Benefits Eligibility section.

SALARY and COMPENSATION

Base Pay Rate:* A Salary is outside the range for 2457-SEMESTER RATE-Grade-1 (0.00 - 0.00)

Unit basis:* B

Monthly Pay:

Annual salary:

Relocation:

Sign on bonus:

Other supplementary compensation:

Salary notes:

Benefits Eligibility

Benefits eligibility is determined based on the appointment. To confirm benefits eligibility please see your benefits office for further details.

Benefits Eligible?: Yes No

Benefit Eligibility Details:

Auxiliary Benefits:

Faculty/R03 Details

Please note: Unlike Temp faculty and Tenure/Tenure-track faculty, no details are needed in this section. However, you must make sure that FTE is filled in the Position Details section.

FACULTY / R03 DETAILS	
Rank:	<input type="text" value="Select"/>
Service Credit:	<input type="text" value="Select"/>
Start Up Amount:	<input type="text"/>
Duration of Start Up Funds:	<input type="text"/>
Assigned/Release Time (in terms of WTU's):	<input type="text"/>
Duration of Assigned/Released WTU:	<input type="text"/>
Contingent annual salary:	<input type="text"/>
Contingent pay rate:	<input type="text"/>
Term:	<input type="text"/>
Total Term Pay:	<input type="text"/>
Duration of Appointment:	<input type="text" value="Select"/>
Weighted Teaching Units (WTU's):	<input type="text"/>
Faculty Fraction Numerator:	<input type="text"/>
Faculty Fraction Denominator:	<input type="text"/>

Enter the Education and License information

11. Use the PS 9.0 Major, Institute and License/ Certification codes file to complete this section (A)
12. Select the candidate's Highest Level of Education (B)
13. Select the candidate's Degree Type (C)
14. Select whether the candidate's degree is the Terminal Degree for Discipline (D)
15. Enter the Date of Completion of the degree (E)
16. Enter the Major Code for the degree; do not enter the name of the degree (F) – if the major code is not in the list, enter in 9999
17. Enter the Institute Code where the degree was earned; do not enter the name of the institute (G) – if the institution where the degree was earned is not in the list, use 888888 for other US institution or 999999 for

EDUCATION and LICENSE VERIFICATION

Please note that you must use the appropriate reference workbook to enter the correct Major, Institute and/or License/Certification code(s) in this section for the data to correctly integrate to PeopleSoft. Each workbook has multiple worksheets. Copy the code from the corresponding workbook and worksheet.

PeopleSoft 9.0 Campuses, use the following:

- [PS 9.0 Major, Institute and License/Certification codes](#) 
- If the appropriate code does not exist in the drop down list or the reference sheets - please follow the Analysis and Recommendations listed in the [Major, License, School Codes Position Paper](#).

CHRS (PeopleSoft 9.2) Campuses, use the following:

- [CHRS PS 9.2 Major, Institute and License/Certification codes](#) 

Highest Level of Education: 

Degree Type: 

Terminal Degree for Discipline: Yes No 

Date of Completion: 

Major Code: 

Institute Code: 

License/Certification Code: 

License/Certification Number: 

License/Certification Expiry Date: 

<p>international institution</p> <p>18. When applicable, enter the License or Certification Code for the candidate (H)</p> <p>19. Enter the number of the license or certificate (I)</p> <p>20. Enter the expiration date of the license or certification (J)</p> <p><i>Please note, if you enter a Major Code you must enter an Institute Code and vice versa. If you enter a License/Certification Code you must enter a License/Certification Number and vice versa.</i></p>	
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Enter the Onboarding information

The Pre-Employment Checks section can be left as defaulted (A).

Before completing the Onboarding section, please review the [Offer Card Guidance](#) job aid.

- 59. Select the Offer Type (B)
- 60. Select the Pay Group (C); for Lump Sum payment, this should be Positive Pay, for AY faculty, this should be ACD; for 12-month faculty, this should be MST
- 61. Select SJ as the Offer Approval Type (D)
- 62. Select Base New Employee Data Form_V2020 as the Onboarding Form (E); *Important: this is not required for current employees*
- 63. Select SJ Onboarding Portal as the Onboarding Portal (F); *Important: this is not required for current employees*

EMPLOYMENT CHECKS

PRE-EMPLOYMENT CHECKS

Background Check: Yes No A

Background Check Codes: A

Pre-placement physical: Yes No

ONBOARDING

OfferType:* B

Pay Group:* C

Offer Approval Type:* D

Onboarding Form: E

Onboarding Portal: F

Onboarding workflow: G

Reports To:* H
[Email address: sjsu.hrtest@gmail.com](mailto:sjsu.hrtest@gmail.com)

Onboarding Delegate 1: I
[Email address: sjsu.hrtest@gmail.com](mailto:sjsu.hrtest@gmail.com)

Onboarding Delegate 2: J
[Email address: sjsu.hrtest@gmail.com](mailto:sjsu.hrtest@gmail.com)

Onboarding Delegate 3: K
[Email address: sjsu.hrtest@gmail.com](mailto:sjsu.hrtest@gmail.com)

64. Select the correct Onboarding workflow (G) Please note, this selection will start the I-9 process once the candidate accepts the offer in CHRS Recruiting;
Important: this is not required for current employees
65. Verify the Reports To information and update if necessary (H); this person will be responsible for the onboarding of the employee
66. If someone else will manage the employee's onboarding processes, enter them as the Onboarding delegate(s) (I, J, K)

Please note, if you change the Reports To information it will not feed to PeopleSoft. You must submit a [Position Management Action Form](#) to update the position.

Enter Verbal Offer information if desired

67. The Verbal Offer information is optional but may be entered if you wish to track the information (A)

68. The date the candidate accepts or declines the offer will be updated by the system (B)

Offer details

OFFER PROGRESS

The following fields will require manual updates

Verbal offer extended: Yes No **A**

Date verbal offer extended:

Verbal offer accepted: Yes No

Date verbal offer accepted:

The following fields will be automatically updated by the system

Offer accepted: Yes No

Date offer accepted: **B**

Offer declined: Yes No

Date offer declined:

Manage the Offer documents

69. If you have the required transcripts for the candidate, you may click Add document to upload them here (A); they can be uploaded later if need be

70. Click Merge document to create the offer letter (B)

Offer details

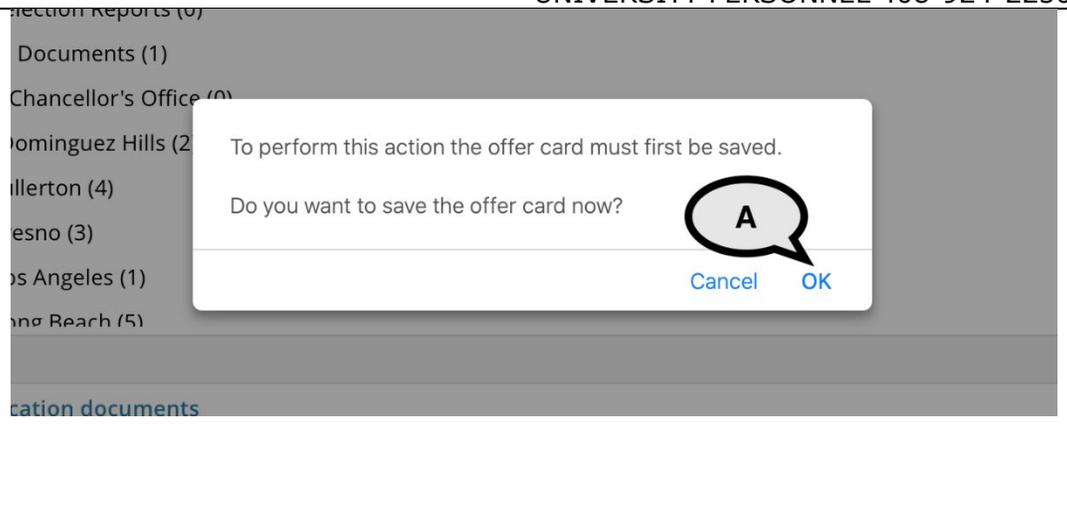
Offer documents

A Document added to the offer application section below.

B Add document Merge document

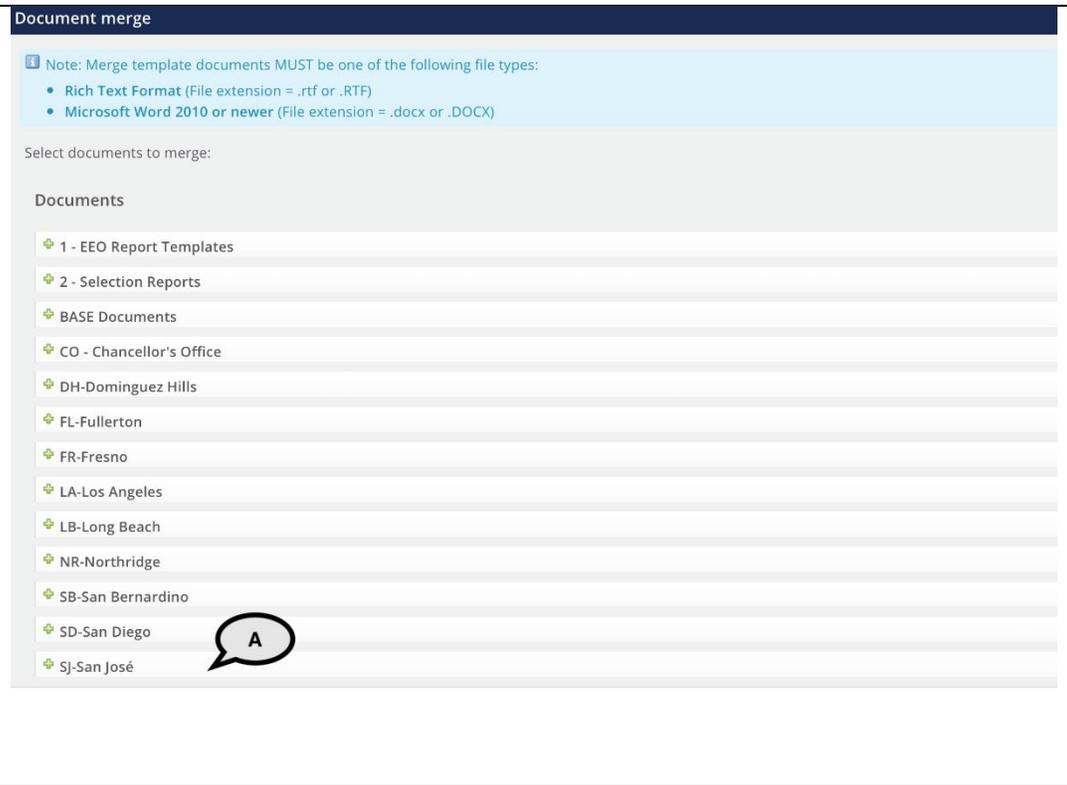
Document	Date	Size	Category
Document library:			
Name	Date	Size	
1 - EEO Report Templates (1)			
2 - Selection Reports (0)			
BASE Documents (1)			
CO - Chancellor's Office (0)			
DH-Dominguez Hills (2)			
FL-Fullerton (4)			
FR-Fresno (3)			
LA-Los Angeles (1)			
LR-Long Beach (5)			

You will be prompted to save the offer card; click OK (A)



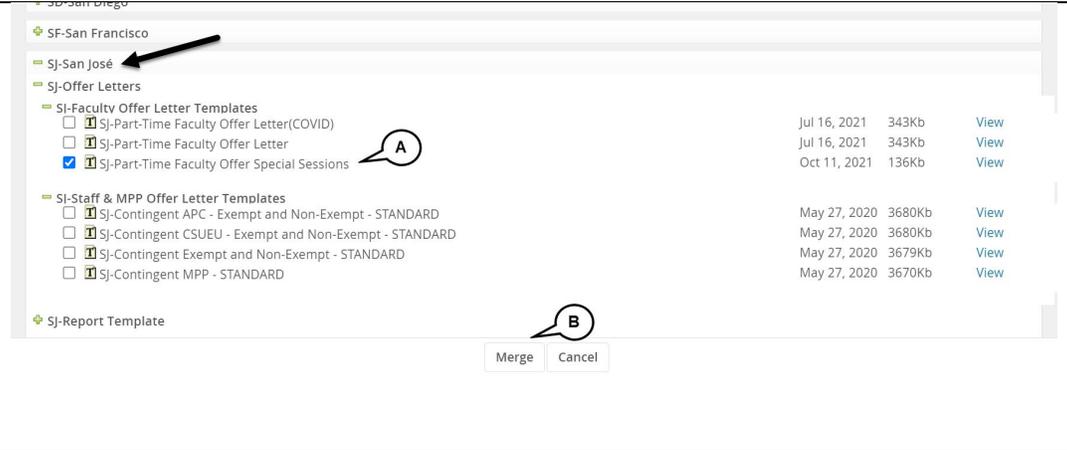
The Document merge window opens

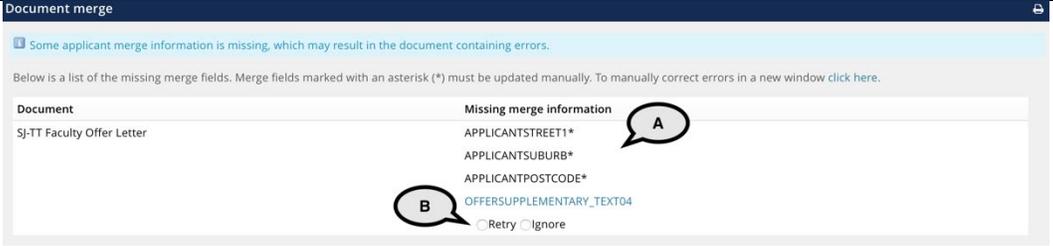
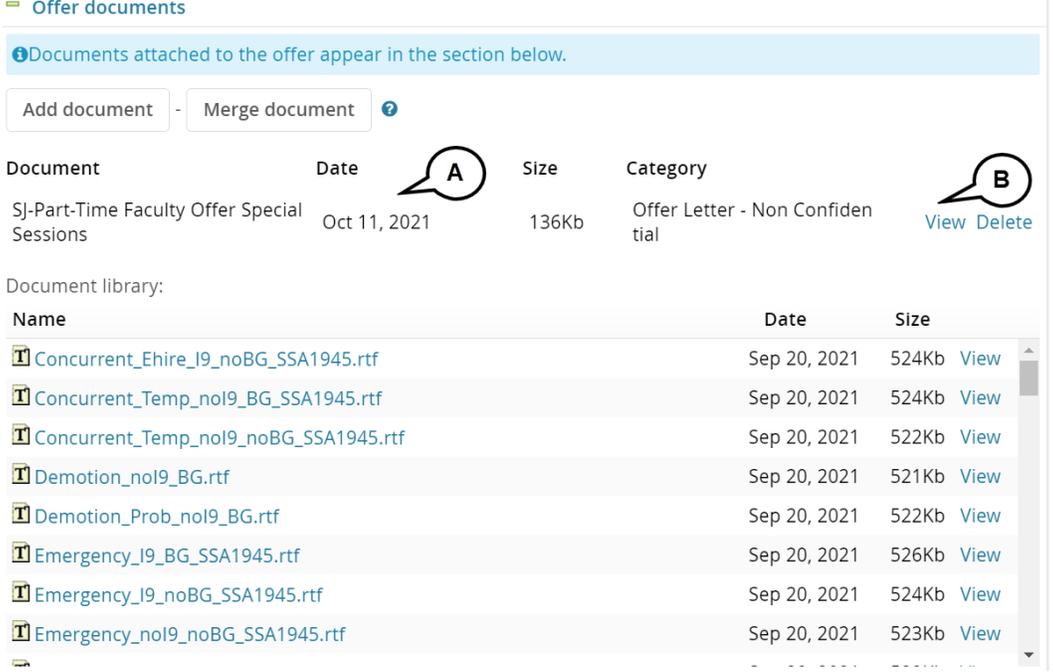
71. Scroll down to find SJ-San Jose (A)



Select the letter type

72. Open SJ-San Jose
73. Open SJ-Officer Letters
74. Open Faculty Offer Letter Templates
75. Select the letter you wish to use (A) (For any Special Sessions, select SJ-Part-Time Faculty)



<p>Offer Special Sessions) 76. Click Merge (B)</p> <p>Warnings of missing fields may appear</p> <p>77. Review the Missing merge information, if any(A); return to the offer card to correct if necessary</p> <p>78. Select Ignore to move forward; missing fields can be updated manually on the letter (B)</p>																												
<p>You are returned to the offer card</p> <p>79. The merged letter appears in the document list (A)</p> <p>80. Click View to download and edit the letter (B)</p>	 <table border="1"> <thead> <tr> <th>Name</th> <th>Date</th> <th>Size</th> </tr> </thead> <tbody> <tr> <td>Concurrent_Ehire_I9_noBG_SSA1945.rtf</td> <td>Sep 20, 2021</td> <td>524Kb</td> </tr> <tr> <td>Concurrent_Temp_noI9_BG_SSA1945.rtf</td> <td>Sep 20, 2021</td> <td>524Kb</td> </tr> <tr> <td>Concurrent_Temp_noI9_noBG_SSA1945.rtf</td> <td>Sep 20, 2021</td> <td>522Kb</td> </tr> <tr> <td>Demotion_noI9_BG.rtf</td> <td>Sep 20, 2021</td> <td>521Kb</td> </tr> <tr> <td>Demotion_Prob_noI9_BG.rtf</td> <td>Sep 20, 2021</td> <td>522Kb</td> </tr> <tr> <td>Emergency_I9_BG_SSA1945.rtf</td> <td>Sep 20, 2021</td> <td>526Kb</td> </tr> <tr> <td>Emergency_I9_noBG_SSA1945.rtf</td> <td>Sep 20, 2021</td> <td>524Kb</td> </tr> <tr> <td>Emergency_noI9_noBG_SSA1945.rtf</td> <td>Sep 20, 2021</td> <td>523Kb</td> </tr> </tbody> </table>	Name	Date	Size	Concurrent_Ehire_I9_noBG_SSA1945.rtf	Sep 20, 2021	524Kb	Concurrent_Temp_noI9_BG_SSA1945.rtf	Sep 20, 2021	524Kb	Concurrent_Temp_noI9_noBG_SSA1945.rtf	Sep 20, 2021	522Kb	Demotion_noI9_BG.rtf	Sep 20, 2021	521Kb	Demotion_Prob_noI9_BG.rtf	Sep 20, 2021	522Kb	Emergency_I9_BG_SSA1945.rtf	Sep 20, 2021	526Kb	Emergency_I9_noBG_SSA1945.rtf	Sep 20, 2021	524Kb	Emergency_noI9_noBG_SSA1945.rtf	Sep 20, 2021	523Kb
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Once the offer letter is prepared, you can continue back to the main document beginning at Upload the Signed Offer Letter and Prepare the Packet, page 19.