

CHRS Recruiting

Creating the Offer Card

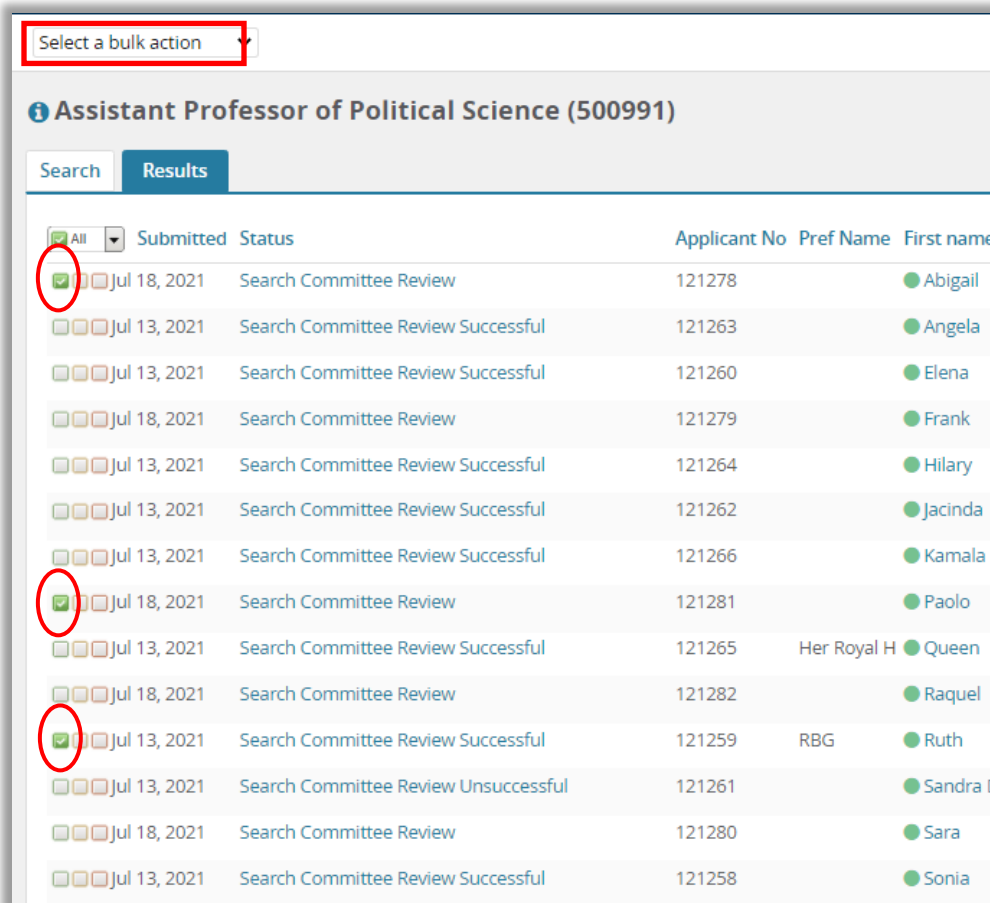
Contents

Steps to Complete Prior to Starting the Offer Card	2
Initiating the Offer Card	5
Completing the Offer Card	7
Offer Details	8
Position Details.....	9
Salary and Compensation.....	10
Faculty/R03 Details	12
Education and License Verification and Employment Checks	14
Onboarding.....	15
Offer Progress	17
Offer Documents, Application Document, and Offer Check.....	18
Approval Process.....	19
Save/Submit	20

Steps to Complete Prior to Starting the Offer Card

Candidates who interviewed on campus should all be moved to the status **Final Committee Tasks – Final Ranking, AA/EOR Certification, Process Summary**. This will be the final status for some of the candidates, and it will also trigger an email notification to the search committee members alerting them to the final steps they need to complete in order to wrap up their part of the recruitment process.

1. Select all of the candidates who participated in a final interview (on campus or virtually) and click the **Select a bulk action** drop down menu.



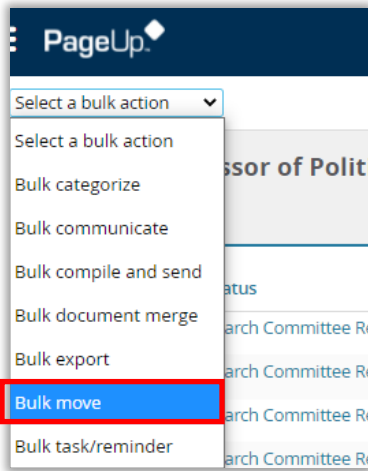
Select a bulk action

Assistant Professor of Political Science (500991)

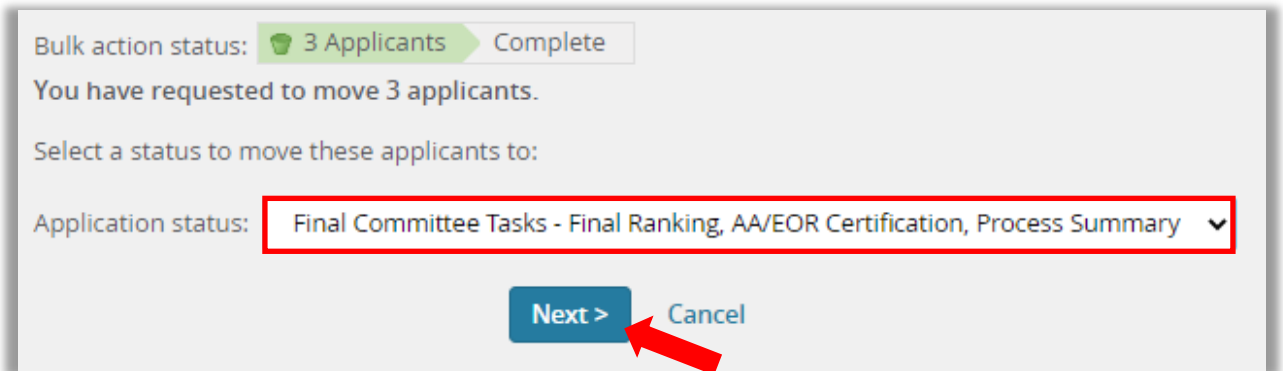
Search Results

<input checked="" type="checkbox"/> All	Submitted	Status	Applicant No	Pref Name	First name
<input checked="" type="checkbox"/>	Jul 18, 2021	Search Committee Review	121278		Abigail
<input type="checkbox"/>	Jul 13, 2021	Search Committee Review Successful	121263		Angela
<input type="checkbox"/>	Jul 13, 2021	Search Committee Review Successful	121260		Elena
<input type="checkbox"/>	Jul 18, 2021	Search Committee Review	121279		Frank
<input type="checkbox"/>	Jul 13, 2021	Search Committee Review Successful	121264		Hilary
<input type="checkbox"/>	Jul 13, 2021	Search Committee Review Successful	121262		Jacinda
<input type="checkbox"/>	Jul 13, 2021	Search Committee Review Successful	121266		Kamala
<input checked="" type="checkbox"/>	Jul 18, 2021	Search Committee Review	121281		Paolo
<input type="checkbox"/>	Jul 13, 2021	Search Committee Review Successful	121265	Her Royal H	Queen
<input type="checkbox"/>	Jul 18, 2021	Search Committee Review	121282		Raquel
<input checked="" type="checkbox"/>	Jul 13, 2021	Search Committee Review Successful	121259	RBG	Ruth
<input type="checkbox"/>	Jul 13, 2021	Search Committee Review Unsuccessful	121261		Sandra D
<input type="checkbox"/>	Jul 18, 2021	Search Committee Review	121280		Sara
<input type="checkbox"/>	Jul 13, 2021	Search Committee Review Successful	121258		Sonia

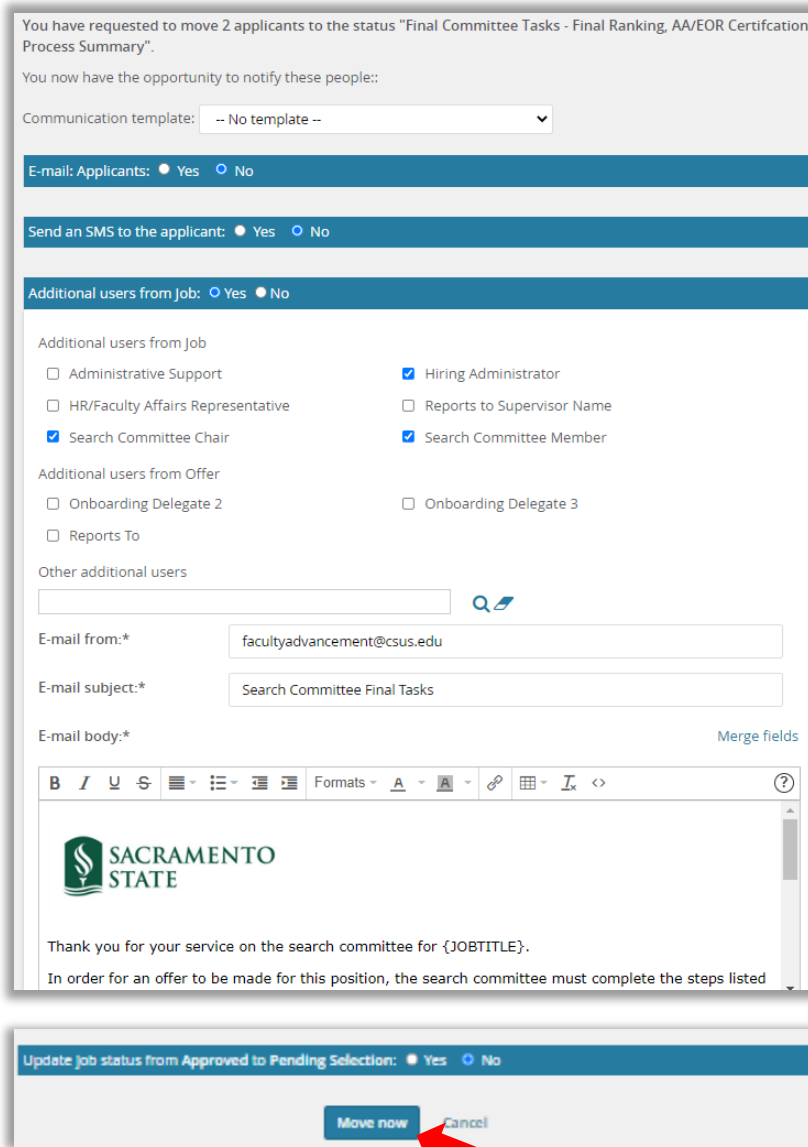
2. Choose **Bulk move** from the list of options.



3. You will be taken to the bulk move window. From the Application status drop down menu, select **Final Committee Tasks – Final Ranking, AA/EOR Certification, Process Summary**. Click **Next**.



- The Status move window will open. You should not need to make any changes to the email or email settings. Scroll down and click **Move now**.



You have requested to move 2 applicants to the status "Final Committee Tasks - Final Ranking, AA/EOR Certification, Process Summary".

You now have the opportunity to notify these people::

Communication template: -- No template --

E-mail: Applicants: Yes No

Send an SMS to the applicant: Yes No

Additional users from Job: Yes No

Additional users from Job

<input type="checkbox"/> Administrative Support	<input checked="" type="checkbox"/> Hiring Administrator
<input type="checkbox"/> HR/Faculty Affairs Representative	<input type="checkbox"/> Reports to Supervisor Name
<input checked="" type="checkbox"/> Search Committee Chair	<input checked="" type="checkbox"/> Search Committee Member

Additional users from Offer

<input type="checkbox"/> Onboarding Delegate 2	<input type="checkbox"/> Onboarding Delegate 3
<input type="checkbox"/> Reports To	

Other additional users

E-mail from:* facultyadvancement@csus.edu

E-mail subject:* Search Committee Final Tasks

E-mail body:* Merge fields

SACRAMENTO STATE

Thank you for your service on the search committee for {JOBTITLE}.

In order for an offer to be made for this position, the search committee must complete the steps listed

Update job status from Approved to Pending Selection: Yes No

Move now Cancel

Search committee members will receive the email above and will complete the AA/EOR form and recruitment process summary. Both of these forms will be completed in AdobeSign and will be sent to OFA upon completion.

In the meantime, the dean may make the conditional offer to the selected candidate via phone/email.

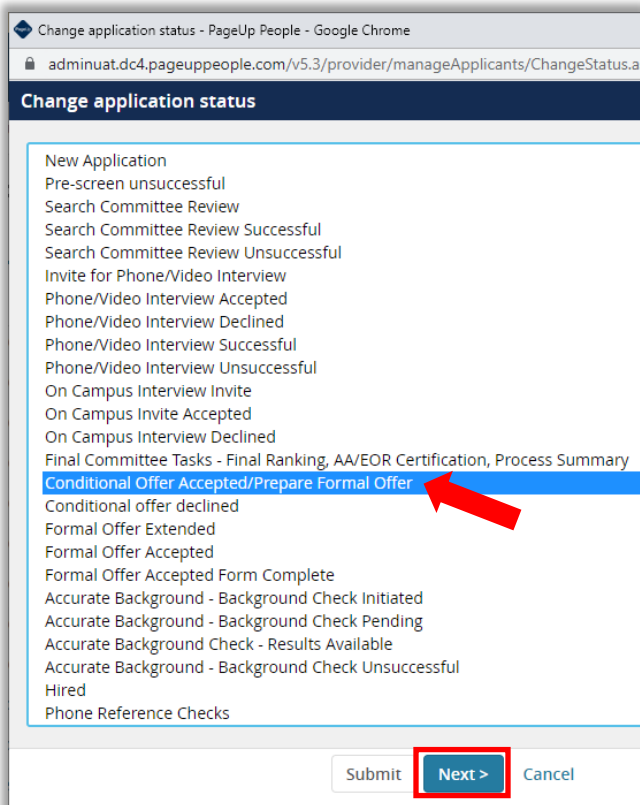
Initiating the Offer Card

Once the selected candidate has verbally accepted the conditional offer made by the dean, the applicant can be moved into the next status and the offer card will become available.

1. Click the status of the selected candidate.

<input type="checkbox"/>	Jul 18, 2021	Final Committee Tasks - Final Rankii 121279	Frank	Faculty
<input type="checkbox"/>	Jul 18, 2021	Final Committee Tasks - Final Rankii 121281	Paolo	Professor
<input type="checkbox"/>	Jul 18, 2021	Conditional Offer Accepted/Prepare Formal Offer 121278	Abigail	Assistant

2. In the Change applicant status window, select **Conditional Offer Accepted/Prepare Formal Offer**. Click **Next**.



Change application status - PageUp People - Google Chrome

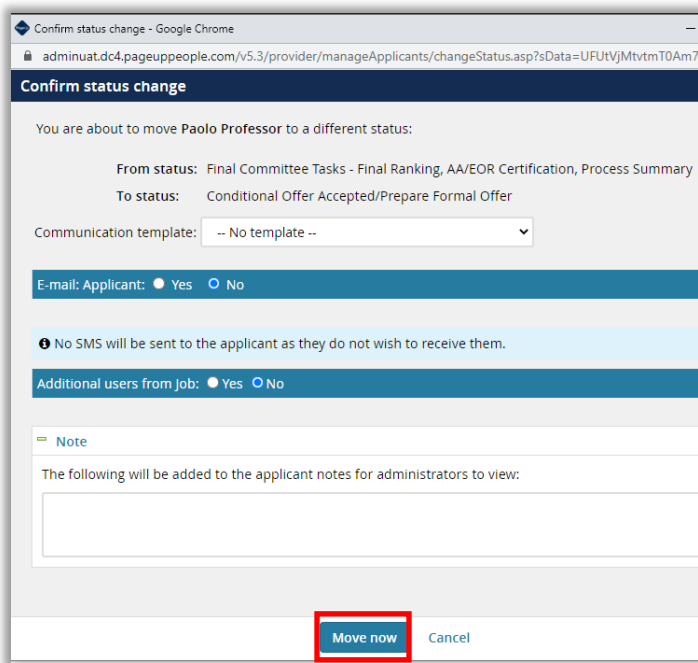
adminuat.dc4.pageuppeople.com/v5.3/provider/manageApplicants/ChangeStatus.as...

Change application status

- New Application
- Pre-screen unsuccessful
- Search Committee Review
- Search Committee Review Successful
- Search Committee Review Unsuccessful
- Invite for Phone/Video Interview
- Phone/Video Interview Accepted
- Phone/Video Interview Declined
- Phone/Video Interview Successful
- Phone/Video Interview Unsuccessful
- On Campus Interview Invite
- On Campus Interview Accepted
- On Campus Interview Declined
- Final Committee Tasks - Final Ranking, AA/EOR Certification, Process Summary
- Conditional Offer Accepted/Prepare Formal Offer**
- Conditional offer declined
- Formal Offer Extended
- Formal Offer Accepted
- Formal Offer Accepted Form Complete
- Accurate Background - Background Check Initiated
- Accurate Background - Background Check Pending
- Accurate Background Check - Results Available
- Accurate Background - Background Check Unsuccessful
- Hired
- Phone Reference Checks

Submit **Next >** Cancel

3. There are no communications to be sent at this time, so in the Confirm status change window, select **Move now**.



Confirm status change - Google Chrome
adminuat.dc4.pageuppeople.com/v5.3/provider/manageApplicants/changeStatus.asp?sData=UFUtvjMvtvmT0Am7

Confirm status change

You are about to move Paolo Professor to a different status:

From status: Final Committee Tasks - Final Ranking, AA/EOR Certification, Process Summary
To status: Conditional Offer Accepted/Prepare Formal Offer

Communication template: -- No template --

E-mail: Applicant: Yes No

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

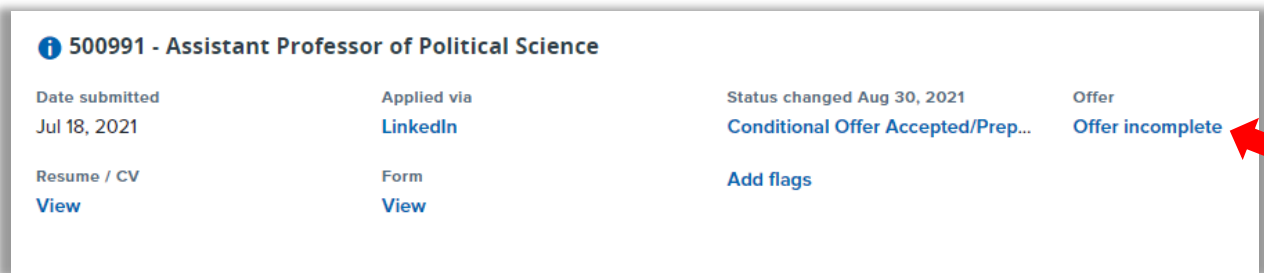
Additional users from job: Yes No

Note

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

Move now Cancel

4. The Offer Card opens. To complete the offer card now, continue following the instructions on the next page. To complete the offer card at a different time, close the offer card window. It can be opened again at a later date from within the applicant card:
 - a. Click the name of the applicant to open up their applicant card
 - b. Click the link in the Offer section of their applicant card (there may be multiple jobs to which they've applied – be sure to choose the correct job):



i 500991 - Assistant Professor of Political Science

Date submitted Jul 18, 2021	Applied via LinkedIn	Status changed Aug 30, 2021 Conditional Offer Accepted/Prep...	Offer Offer incomplete
Resume / CV View	Form View	Add flags	

- c. The offer card will open. Proceed to the instructions on the next page.

Completing the Offer Card

Paolo Professor
[Revision history](#)

Personal details

Address: California
United States

E-mail: hornethire+paolo@gmail.com

Applicant No: 121281

[View profile](#)

Phone:

Current or previous employee details

! 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 Administrator to submit a "High Impact" JIRA ticket, which includes the correct Employee number from your campus' PeopleSoft environment.

Select current active employee only:

Employee: [🔍](#) [✎](#)

No user selected.

Job details

CSU Working Title:

Position Type:

Campus:

Division:

College/Program:

Department:

Time Basis:

! Assistant Professor of Political Science.

Instructional Faculty – Tenured/Tenure-Track

Sacramento

Academic Affairs

College of Soc Sci and IS

Political Science - 38300

Full Time ▼

There are no steps to be taken on the first three sections (personal details, current or previous employee details, and job details). Scroll to the **Offer details** section.

Offer Details

Offer details

Approval status: **Approved**

Recruiter: Casey Valdez

Date entered: Jul 20, 2021, 8:42 pm

Date updated: Aug 4, 2021, 4:53 pm

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



Positions:

Position no	Type:	Applicant	Application status
<input checked="" type="radio"/> Assistant Professor Position no: SA-00012636	New	Paolo Professor	Conditional Offer Accepted/Prepare Formal Offer

Ensure the correct position number is selected. Contact your OFA Analyst if you have questions about the position number.

Position Details


POSITION DETAILS


Job Code/Employee Class:  


Job Code: 2360 ▼

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

Hiring Type: ▼

Start date:* 

End date if applicable: 

Probation End Date: 

FTE:

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

Fill out the information as appropriate for this position (Note: most of the information should already be filled out as it auto-populates from the job card). Fields that are blank in the image above are not required and should be left blank.

Salary and Compensation

SALARY and COMPENSATION

Base Pay Rate:* 1

Unit basis:* 2

Monthly Pay: 3

Annual salary: 4

Relocation: 5

Sign on bonus:

Other supplementary compensation: 6

Salary notes:

Benefits Eligibility

7 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:

#	Field	Information
1	Base Pay Rate	Enter the monthly base pay rate (must be a whole number)
2	Unit basis	Select Monthly .
3	Monthly Pay	Enter the same monthly base pay rate as in #1 above (it must be entered in both fields, #1 and #3).
4	Annual Salary	Enter the annual salary (monthly base pay x 12 months).



#	Field	Information
5	Relocation	Enter the relocation/moving expenses that will be reimbursed, if applicable. If not applicable, leave blank or type N/A.
6	Other supplementary compensation	Enter any other supplementary compensation here, as applicable (i.e. summer employment, research equipment, student assistant money, etc.).
7	Benefits Eligibility	It is not necessary to enter any information in the Benefits Eligibility section. The Benefits Office will take care of the Benefits for tenure track faculty.

Faculty/R03 Details

FACULTY / R03 DETAILS

1 Rank:

2 Service Credit:

3 Start Up Amount:

4 Duration of Start Up Funds:

5 Assigned/Release Time (in terms of WTU's):

6 Duration of Assigned/Released WTU:

Contingent annual salary:

Contingent pay rate:

Term:

Total Term Pay:

Duration of Appointment:

7 Weighted Teaching Units (WTU's):

Faculty Fraction Numerator:

Faculty Fraction Denominator:

#	Field	Information
1	Rank	Using the drop down, choose the correct rank.
2	Service Credit	Using the drop down, choose 1 year , 2 years , or None .
3	Start up amount	If applicable, enter the amount of start up funds offered by the dean.

#	Field	Information
4	Duration of start up funds	Enter the duration (in years) that the start up funds will be available. Note: Only a number is accepted in this field. The assumed unit of measurement is years.
5	Assigned/Release Time (in terms of WTUs)	This value will normally be 12 (see Article 20.36 Reduction in Instructional Assignments for New Probationary Faculty). If you believe this number should be anything other than 12 please contact your OFA Analyst.
6	Duration of Assigned/Release Time	This value will normally be 2 (see Article 20.36 Reduction in Instructional Assignments for New Probationary Faculty). If you believe this number should be anything other than 2 please contact your OFA Analyst.
7	Temp Faculty Fields	Leave these fields blank for tenure track faculty positions. These fields will be used only when hiring temporary faculty.

Education and License Verification and Employment Checks

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: 

EMPLOYMENT CHECKS

PRE-EMPLOYMENT CHECKS

Background Check: Yes No

Background Check Codes:

Pre-placement physical: Yes No

It is not necessary to fill anything out in these sections. Scroll to the Onboarding section.

Onboarding

ONBOARDING

1 OfferType:*

2 Pay Group:*

3 Offer Approval Type:*

4 Onboarding Form:

5 Onboarding Portal:

6 Onboarding workflow:

7 Reports To:* 🔍 ✎
Email address: jhcox@csus.edu

8 Onboarding Delegate 1: 🔍 ✎
Email address: casey_valdez@csus.edu

9 Onboarding Delegate 2: 🔍 ✎
Email address: jcahill@csus.edu

10 Onboarding Delegate 3: 🔍 ✎
Email address: marobins@csus.edu

#	Field	Information
1	Offer Type	Select Hire .
2	Pay Group	Select Academic Calendar (ACD) (unless you are hiring a 12-month position, such as a department chair. In that case, select Master Payroll (MST)).
3	Offer Approval Type	Select SA (this is the Sacramento Prefix).
4	Onboarding Form	Select Base New Employee Data Form_V2020 .

#	Field	Information
5	Onboarding Portal	Select SA Onboarding Portal .
6	Onboarding workflow	Select SA-Faculty Tenure Track .
7	Reports To	Enter the department chair to which the new hire will report.
8	Onboarding Delegate 1	Enter your OFA Analyst (Justin Gaulke or Casey Valdez)
9	Onboarding Delegate 2	Enter the department administrative coordinator
10	Onboarding Delegate 3	Enter the College Resource Analyst

Offer Progress

OFFER PROGRESS

The following fields will require manual updates

1

Verbal offer extended: Yes No

2

Date verbal offer extended:

3

Verbal offer accepted: Yes No

4

Date verbal offer accepted:

The following fields will be automatically updated by the system

5

Offer accepted: Yes No

Date offer accepted:

Offer declined: Yes No

Date offer declined:

#	Field	Information
1	Verbal offer extended	Select Yes
2	Date verbal offer extended	Enter the date on which the dean extended an offer to the candidate
3	Verbal offer accepted	Select Yes
4	Date verbal offer accepted	Enter the date on which the candidate accepted the dean’s offer.
5	Remaining fields	These fields will be updated by the system when the candidate accepts the formal offer. Leave these fields blank.

Offer Documents, Application Document, and Offer Check

Offer documents

Documents attached to the offer appear in the section below.

-
 ?

Document	Date	Size	Category
Document library:			
Name	Date	Size	
1 - EEO Report Templates (0)			
2 - Selection Reports (1)			
BASE Documents (1)			
CI-Channel Islands (2)			
CO-Chancellor's Office (4)			
DH-Dominguez Hills (2)			
EB-East Bay (2)			
Faculty TT Offer Letter (0)			
FL-Fullerton (4)			

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
<i>No documents were found.</i>		

Offer Check

Add a check group: ▼

Add a check type: ▼

It is not necessary to fill in any fields in these sections. Scroll down to the **Approval process** section.

Approval Process

Approval process - Campus

Hiring Manager:* 1 🔍 ✎
No user selected

Approval process - Campus: 2 ▼

3 1. OFA Analyst: 🔍 ✎
No user selected.

2. OFA Manager: 🔍 ✎
Email address: jkernen@csus.edu ▼

3. Budget Office: 🔍 ✎
Email address: bpa-01@csus.edu ▼


4. Provost Office: 🔍 ✎
No user selected.

5. OFA Final Review: 🔍 ✎
No user selected.

#	Field	Information
1	Hiring Manager	Enter the College Resource Analyst for your college.
2	Approval process- Campus	Choose SA-Faculty Tenure Track Offer Approval
3	Enter the Approvers as follows:	1. OFA Analyst (Justin Gaulke/Casey Valdez) 2. OFA Manager (Jacquelyn Kernen) 3. Budget Office (bpa-01@csus.edu) 4. Provost Office (Academic Affairs Analyst) 5. OFA Final Review (Justin Gaulke/Casey Valdez)

Save/Submit

1 **Application status**

Update application status following offer: Yes No 

Provisioning

Click the 'add' button below to add a provisioning item

Add

Item	Option
Provisioning address:	<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <p style="font-size: small; color: #808080;">Please include the address of where it is to be delivered to and a contact number</p>

Exports

Export Title	Exported	Export Date (Eastern Standard Time)
No Exports were found.		

2

3

4

Save and close

Submit

Cancel

#	Field	Information
1	Application status	Do not change this field – leave as No .
2	Save and close	Save to complete and submit for approval later.
3	Submit	Save the offer card and submit to the approval process.
4	Cancel	Cancel the offer card. Changes will not be saved.