UNIVERSITY PERSONNEL 408-924-2250

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Introduction

Once the verbal offer is accepted, the offer letter will be prepared outside of CHRS. 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. For more information about this process, contact Faculty Services. Once the letter is signed and the background check is clear, the final offer will be prepared and extended in CHRS Recruiting.

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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 candidate to the "Background Check Initiated" status in CHRS Recruiting. Refer to <u>Initiate and</u> <u>Manage Background Checks – Faculty</u> 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.

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Background Check



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Prepare the Offer



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Move the Candidate to the Prepare Offer and	Change application status	0
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 Frome video interview invite Phone/Video Interview Accepted Phone/Video Interview Declined 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 Unsuccessful On Campus Interview Unsuccessful On Campus Interview Evaluation Summary On Campus Interview Evaluation Summary On Campus Interview Unsuccessful On Campus Interview Unsuccessful On Campus Interview Unsuccessful Background Check Initiated outside of CHRS Recruiting Background Check Pending Processing - 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 Rescrinded	
	Offer Accepted Paperwork Received-DO NOT SELECT-SYSTEM STATUS ONLY Formal Offer Declined Job Closing Communication Offer Rescinded Recruitment Cancelled Submit Next > Cancel	Ţ

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	UNIVERSITY PERSONNEL 408-924-2250			
Confirm the status	Confirm status change			
change				
-	You are about to move Sparty Spartan to a different status:			
3. No communication	From status: On Compus Interview Successful			
will be sent to the	Fion status. On campus interview succession			
candidate at this	To status: Prepare Offer and Upload Transcripts			
$ctop(\Lambda)$	Communication template: No template			
A If applicable open				
4. Il applicable, open	E-mail: Applicant: Avec A			
the Additional users				
section and prepare				
the email (B)	O No SMS will be sent to the applicant as they do not wish to receive them.			
5. If prompted to				
change the job	Additional users from job: Types Tho			
status for a	\sim			
topurod/topuro-	Note			
	The following will be added to the applicant notes for administrators to view:			
track/F1 temp	The following will be added to the applicant notes for administrators to view.			
recruitment, select				
Yes (C); DO NOT				
CHANGE THIS FOR				
	Update job status from Approved to Offer : • Yes • • No			
RECRUITMENTS				
Click Move now (D)				
	Move now Cancel			
The Offer details	Offer details			
window opens: Verify				
the Personal Details	Sparty Spartan			
1 Confirm the	Personal details			
Addross Bhono and	Address: California Phone:			
Address, Phone and	United States			
Email information	E-mail: sjsu.hrtest+987654321@gmail.com			
(A)	Applicant No: 40056			
2. If the candidate is a	Niew profile			
current employee	New prome			
enter their name in				
	Current or previous employee details			
the Employee field	Discondensities developed the instructions hefers extention on Englance Due file			
(B)	Please download and read the instructions before selecting an Employee Profile.			
	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			

PREPARING AND EXTENDING THE OFFER T/TT & FT FACULTY RECRUITMENTS

1		
Verify the Job and Offer Details	Offer details	
	Job details	
3. Review the Job	CSU Working Title:	er.
details (A)	Position Type: Instructional Faculty – Tenured	I/Tenure-Track
4. Review the offer	Campus: San Jose	
details (B)	Division: Academic Affairs	
5. Confirm the	College/Program: CPGE-Professional & Global Ed	I
position	Department: Applied Data Science - 1628	
information; if	Time Basis: Full Time 🖨	
there are multiple		
positions in the		
recruitment, make		
sure the correct	Approval status: Pending	
one is selected (C)	Recruiter: Carrie Medders	
	Date entered: Jul 4, 2020, 11:56 am	
Please note: If the position	Application source: Internet - Diversity Jobs Edit	
lassification or grade/rank	Positions:	
han the original position.	Position no	Type: Applicant Application status
ou may have to update	Assistant Professor	New
he Salary Range/Grade in	Position no: SJ-00013759	
the Budget Details section.		
	Save and close	ubmit Cancel

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Varify and und	ata tha	UNIVERSITY PERSONNEL 408-924-22		
Position Detail				
	-		POSITION DETAILS	
6. Verify the and hiring	e job code g type (A)	Job Code/Employee Class:	Instr Fac AY	
7. Enter the	Start		Job Code: 2360	
date; ento Probation	er the End Date	Hiring Type:	Probationary +	
(B)		Start date:*		
8. Verify the Hours Per	FTE and Week;	End date if applicable:		
verify or s	select the	Probation End Date:		
FLSA Stat	us (all	FTE:	1.000000	
faculty ar (C)	e exempt)	Hours Per Week:	40.00 D	
9. Verify the		FLSA Status:	Select	
Mandated	Reporter	Union:	Select 🗘	
Interest d	lata (D)	Union Language:		
		Mandated Reporter:	General - The person holding this position is considered a general mandated repo	
		NCAA:	∩ Yes ⊙ No	
		Sensitive Position:	Select 🗘	
		Conflict of Interest:	None 🗘	
		Concurrent Hire:	○ Yes ⊙ No	
		Rehired Annuitant:	⊖ Yes ⊙ No	
Verify the Budg Details	get o	ffer details	8	
		_	BUDGET DETAILS	
1. Ensure th is selected most facu may be 1	e Pay Plan d (AY for llty; some 2-months)	Budget/Chart field/Account string:		
(A)	Calarri	Pay Plan:	AY	
2. verity the Range/Gr	ade (B) -	Pay Plan Months Off:	В	
different chose was different range/gra	ade, you	Salary Range/Grade:*	2360-ASSISTANT PROFESSOR-Gra Q a book Minimum: \$ 5,046.00 Maximum: \$ 11,197.00 Pay Frequency:	
change th information	his on to	Anticipated Hiring Range:		
match		Maximum budgeted amount:		

PREPARING AND EXTENDING THE OFFER T/TT & FT FACULTY RECRUITMENTS UNIVERSITY PERSONNEL 408-924-2250

Update the Salary and	SALARY and COMPENSATION		
Compensation			
Information	Base Pay Rate:*		
10. Enter the Base Pay	Unit basis:*	Select	
Rate (A) 11. Select Monthly as	Monthly Pay:		
the Unit basis (B)	Annual salary:		
12. Enter the Annual salary (C)	Relocation:		
If you are planning to offer	Sign on bonus:		
relocation or other supplementary	Other supplementary compensation:		
key those values here. They can also be added on the letter.	Salary notes:		
<i>Please note, you do not need to enter or select anything in the Benefits Eligibility section.</i>	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:	Select •	
Complete the Faculty/R03 Details	Offer details	8	
13. Select the Rank for Tenured/Tenure- Track recruitments (A)	Rank: Service Credit: Start Up Amount: Duration of Start Up Funds: Assigned/Release Time (in terms of WTU's): Duration of Assigned/Released WTU: Contingent annual salary:	Select Select	

PREPARING AND EXTENDING THE OFFER T/TT & FT FACULTY RECRUITMENTS

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Enter the Education and License information

- 14. Use the 9.0 Major, Institute and License/ Certification codes file to complete this section (A)
- 15. Select the candidate's Highest Level of Education (B)
- 16. Select the candidate's Degree Type (C)
- 17. Select whether the candidate's degree is the Terminal Degree for Discipline (D)
- 18. Enter the Date of Completion of the degree (E)
- 19. 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
- 20. 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 international institution

	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:		
	 <u>PS 9.0 Major, Institute and License/Certification codes</u> 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 <u>Major, License, School</u> <u>Codes Position Paper.</u> 		
	CHRS (PeopleSoft 9.2) Campuses, use the following:		
	<u>CHRS PS 9.2 Major, Institute and License/Certification codes</u>		
Highest Level of Education:	Select *		
Degree Type:	Select		
Terminal Degree for Discipline:	○ Yes ● No ∠D		
Date of Completion:			
Major Code:	∠_F)		
Institute Code:	G		
License/Certification Code:	() ()		
License/Certification Number:			
License/Certification Expiry Date:			

EDUCATION and LICENSE VERIFICATION



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21. When applicable,
enter the License or
Certification Code
for the candidate
(H)

- 22. Enter the number of the license or certificate (I)
- 23. Enter the expiration date of the license or certification (J)

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.

PREPARING AND EXTENDING THE OFFER T/TT & FT FACULTY RECRUITMENTS

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Enter the Onboarding	EMPLOYMENT CHECKS		
information	PRE-EMPLOYMENT CHECKS		
The Employment Checks section is not used (A).	Background Check: O Yes O No Background Check Codes: Select T		
Before completing the Onboarding section, please review the <u>Offer Card</u> Guidance job aid.	Pre-placement O Yes O No physical:		
 24. Select the Offer Type (B) 25. Select the Pay Group (C); for AY faculty, this should be ACD; for 12- month faculty, this should be MST 26. Select SJ as the Offer Approval Type (D) 27. Select Base New Employee Data Form_V2020 as the Onboarding Form (E): this is not 	OfferType:* Hire Pay Group:* Academic Calendar (ACD) Offer Approval Type:* S Onboarding Form: Base New Employee Data Form_V2020 Onboarding Portal: SJ Onboarding Portal Onboarding Workflow: Reports To:* Carrie Medders I Ulia Chan I U U U U U U U U U U U U U U U U U U		
required for current employees 28. Select SJ Onboarding Portal as the Onboarding Portal (F); this is	Onboarding Delegate 2: Email address: lisa.x.chen@sjsu.edu Onboarding Delegate 3: Remie Bontrager K Q Email address: remie.bontrager@sjsu.edu		
not required for current employees 29. Select the correct Onboarding workflow (G); this is not required for current employees 30. Verify the Reports To information and update if necessary (H); this person will be responsible for the onboarding of the employee			

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		50
31. 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		
it will not feed to PeopleSoft. You must submit a <u>Position</u> <u>Management Action Form</u> to update the position.		
Enter Verbal Offer information if desired	Offer details OFFER PROGRESS	€
32. The Verbal Offer		
information is optional but may	Verbal offer extended: O Yes O No	
be entered if you	Date verbal offer extended:	
information (A)	Verbal offer accepted: Ves • No	
33. The date the	Date verbal offer 💼	
or declines the	The following fields will be automatically updated by the system	
offer will be	Offer accepted: ○ Yes ⊙ No	
updated by the	Date offer accepted:	
system (b)	Offer declined: Yes No	
		_
Manage the Offer documents	Offer documents Offer appear in the section below.	
34. If you have the	Add document - Merge document	
required transcripts	Document Date Size Category	
for the candidate	Decument librang	
you may click Add	Name Date Size	
document to upload	1 - FFO Report Templates (1)	
them here (A);		
uploaded later if		
need be		

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Submit the offer card	Offer Check	
 35. The Offer Check section is not used (A) 36. Confirm that your name is in the 	Add a check group: Select Add Add a check type: Select Add	
Originator field (B) 37. The Approval	Approval process - Campus	
process-Campus is not used (C) 38. Do not change the application status radio button (D) 39. The Provisioning section is not used (E) 40. Click Submit (F)	Originator:* Carrie Medders Carrie Medders Carrie Medders Carrie Medders Computed address: sjsu.hrtest@gmail.com Carrie Medders Carrie Medders Computed address: sjsu.hrtest@gmail.com Carrie Medders Computed address: sjsu.hrtest@gmail.com Carrie Medders Carrie Medders Computed address: sjsu.hrtest@gmail.com Carrie Medders Carrie Medders Carrie Medders Computed address: sjsu.hrtest@gmail.com Carrie Medders Carrie Medders Carrie Medders Computed address: sjsu.hrtest@gmail.com Carrie Medders Carrie Medder	
You will receive confirmation that your offer card has been saved	Changes have been saved	
41. Scroll to the bottom of the window then click Save and Close to close the offer card.	Sparty Spartan	2 Revision history

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Upload the Signed Offer Letter and Extend the Offer

The majority of this process is for all types of faculty recruitments. The necessary paperwork for a Tenured/Tenure-Track/Full-time Temp Faculty recruitment will be compiled and filed by the Faculty Services Recruiter.

Navigate to the list of applicants	Assistant Professor - Steyer (497062)			
	Search Results			
	Select 💽 Submitted Status 🗢	Applicant Nc Pref Name First name Last name		
	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	A Ochristine Son		
	Jun 25, 2020 Prepare Offer and Upload Transcripts	40056 Sparty Spartan		
Move the candidate to the new status	Change application status	D		
 Select Formal Offer Extended from the status list (A) Click Next (B) 	Change application status Change application status Chone/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 Insuccessful On Campus Interview Insuccessful On Campus Interview Insuccessful 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 Initiated in CHRS Recruiting Background Check Pending Processing - DO NOT SELECT - SYSTEM STATUS ONLY Background Check Unsuccessful Prepare Offer and Upload Transcripts 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		

PREPARING AND EXTENDING THE OFFER T/TT & FT FACULTY RECRUITMENTS UNIVERSITY PERSONNEL 408-924-2250

O and former the state to a state	Confirm status shange			
change and notify the candidate	Your offer has not been approved. Are you sure you want to proceed with the status change?			
You will be prompted that the offer has not been approved (A). Since we	You are about to move Sparty Spartan to a different status:			
are not doing offer approvals in the system, you may ignore this.	To status: Formal Offer Extended Communication template: No template			
You will also see a message reminding you that the candidate will be notified at this step (B).	 Upon moving into this status, the applicant will have the ability to approve or decline an employment offer for this job. On approving the offer, the applicant will be required to complete the Base New Employee Data Form form. 			
 Review the email and update if necessary (C) Click Move Now (D) 	From:* up-donotreply@sjsu.edu Subject:* SJSU Offer of Employment Message: Merge fields			
Please note: If prompted to change the job status for a tenured/tenure- track/FT temp recruitment, select Yes (C); DO NOT CHANGE THIS FOR PT TEMP RECRUITMENTS.	B I U S Image: S Formats * A + A + A + A + A + A + A + A + A + A			
The Offer Card displays	Changes have been saved			
	Sparty Spartan D Revision history			
Scroll to the Offer documents section	Coffer documents			
 Click Add document to upload the signed offer letter (A) 	Once documents attac A is offer appear in the section below. Add document - Merge document Document Date Size Category			
<i>Please note, if you did not upload transcripts when the offer was prepared, you should upload them</i>	Document library: Name Date Size 1 - FFO Report Templates (1)			

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Upload the signed offer	Upload a new document 🕒			
 Click Upload file to find the document (A) Select Offer Letter Non Confidential for the Document category (B) Give the document a title if desired (C) Click Save and close (D) 	File:* Document category:* Offer Letter - Non Confidential Title: Save and add another Save and close Close			
The offer letter appears in the Offer documents section (A)	Offer documents Offer documents Operation below.			
	Add document Merge document Document Size Category S Spartan Signed Offer Letter Jul 4, 2020 351Kb Offer Letter - Non Confiden tial			
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 SizeCategorySJ-TT Faculty Offer Letter347KbOffer Letter - Non ConfidentialView			
	Page 1 of 1 Records 1 to 1 of 1			
	Save and close Submit Cancel			
The application status has been updated (A)	Assistant Professor - Steyer (497062) Search Results			
	Select 🕞 Submitted Status 🗢 🛛 🗛 Applicant Nc Pref Name First name Last name			
	Jun 25, 2020 Formal Offer Extended 40056 • Sparty Spartan			
	Jun 25, 2020 New Application 40055 Tester Testy			
	Jun 21, 2020 Prepare Offer and Upload Transcripts 39968 Christine Son			

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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.

		F
View t	the offer	Welcome Sparty Update profile Update resumé Account
1.	The candidate will see a highlighted box with a link to view the offer (A)	You have been made an employment offer for your Assistant Professor - Steyer application. View Offer Below you will find information regarding jobs to which you have applied. You may also update your profile information and/or change your password. Incomplete applications You have no incomplete applications. Submitted applications • Assistant Professor - Steyer (497062) Son Jose Application submitted 25 Jun 2020 at 2:57pm PST. Current status: Offer extended
Accep	t the offer	Employment offer
2. 3. 4. 5. Once ti offer, i will be comple Hire Da	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) hey agree to the f applicable, they prompted to ete the Base New ata Form.	<text><text><text><text><text></text></text></text></text></text>

PREPARING AND EXTENDING THE OFFER T/TT & FT FACULTY RECRUITMENTS

The application status is updated once the	Assistant Professor - Steyer (497062)				
offer is accepted and the base form is completed (A)	Search Results				
completed. (A)	Select 💌 Submitted Status 🔻	Applicant Nc Pref Name	e First name Last name		
Please note, for current	Jun 25, 2020 New Application	40055	Tester Testy		
complete the Base New	Jun 25, 2020 Offer Accepted Paperwork Received	40056	Sparty Spartan		
Hire Data Form, this status	Jun 21, 2020 Phone/Video Interview Unsuccessful	39967	Adi Alsaid		
accept the offer.	Jun 21, 2020 Prepare Offer and Upload Transcripts	39968	Christine Son		
Integration process begins. 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.					