SACRAMENTO STATE
HUMAN RESOURCES

CHRS Recruiting

Initiating an Offer Card – Unit 11

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Introduction

This guide shows you how to work with offers and make offers to selected applicants. Offers require an approval process and fields on the offer are used for PeopleSoft integration.

Definitions

Term	Definition
Applicant card	The Applicant card is a complete summary of an applicant in the system, including their personal details and application history.
Application status	A single stage of a recruitment process. Campuses pre-determine their recruitment processes based on the type of recruitment. Application status identifies where an applicant is in that process. Example: First Interview Successful.
Job card	The Job card initiates a requisition with specific and relevant details of the job, posting language and requirements, and includes an approval process with notifications and alerts to approvers. With a unique ID to represent each requisition, it facilities central information collection and tracking. The Job card also associates users to the requisition by their roles in the recruitment process, such as the Hiring Manager, HR/FA Representative (Recruiter), Search Committee Chair and other key team members.
Job code	Job code is a four-digit number assigned to a specific classification based on CSU Classification Standard. In CHRS Recruiting, it is also referred to as Employee Classification. The field displays the classification title, and the Job No (number) box displays the actual four-digit code. Example: 1038
Library	A collection of documents and folders that exist in the CHRS Recruiting system. The library can contain such documents as interview guides, offer letters, and position descriptions.
Merge field	Merge fields are specific text strings that pull information directly from the system. You can use merge fields to personalize bulk communications. Example: Dear {FIRSTNAME} is shown in the communication preview. When the communication is sent, {FIRSTNAME} is replaced by the value of the applicant's first name.
Offer card	A form that is used for creating the official offer to the selected applicant. The Offer card requires an approval process.
Offer status	The offer status shows the progress of the offer through the offer approval process.
PeopleSoft HCM	PeopleSoft CHRS is the Common Human Resources System. CHRS Recruiting (PageUp) is a separate system that ties in to CHRS via integration, so that records in the two systems are consistent.

Term	Definition
Position number	An eight-digit number associated with a position that is generated in CHRS. Position numbers are attached to positions when they are imported from PeopleSoft into PageUp. In PageUp, Positions numbers start with a campus two-letter code. Example: SA-00027198. (SA is the campus code for Sacramento.)
Provisioning	A PageUp feature that you use to order equipment, access, hardware, and software needed for a new hire. For physical items, provide an address for where the items are to be delivered.

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Create an offer

To prepare an offer for approval, you need to do the following tasks:

- Create an offer
- Complete the Offer card
- Select an offer approval process

About the Offer card

The Offer card, like the Job card, is a form that is used across the CSU system. The Offer card is organized into sections to help separate fields that are related to CSU employee positions.

Because new hires must be recorded in CHRS, information in PageUp must be synchronized with PeopleSoft. Fields must be completed correctly or the integration can fail.

When you create the offer for the first time, you should open the Offer card by using an application status change. To trigger the offer card, you must change the selected candidate's application status to **Prepare Offer to Extend.**

After you create the offer, the Offer card is more easily accessed through the Applicant card by clicking the Offer status link.

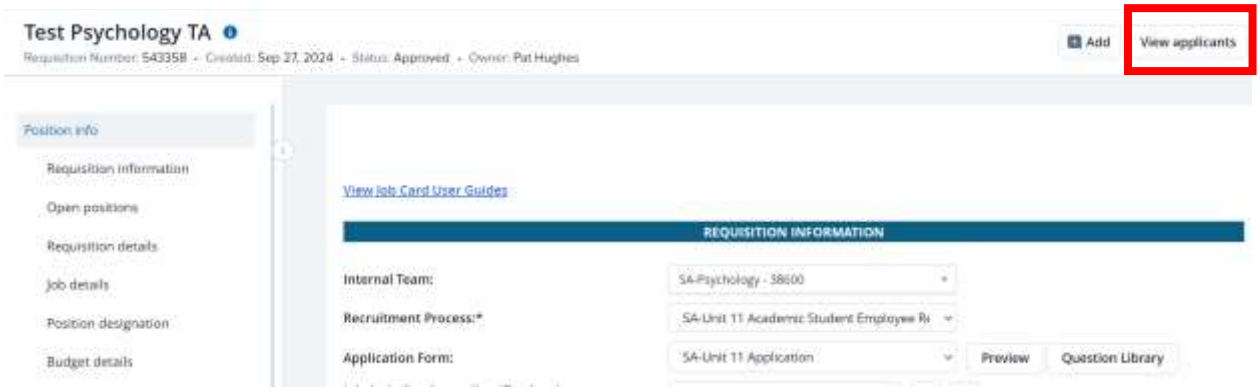
When to create an offer

- After you have decided on a finalist to offer the job

How to create an offer

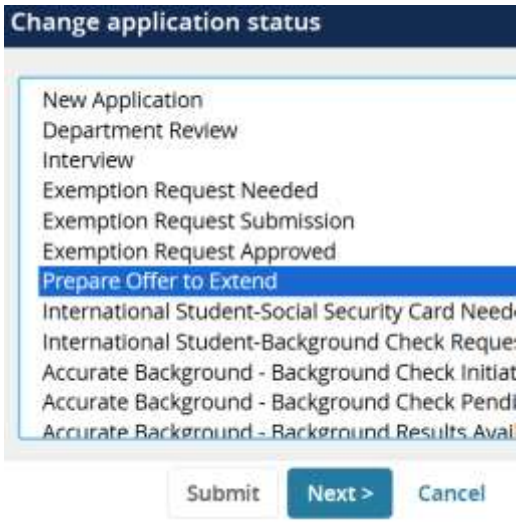
You access the Offer card through the Offer status link on the Applicant card. However, when you are preparing the offer for the first time, you do this by changing the application status.

1. Open the **View applications** page for the job.



2. Click the status of the candidate you would like to prepare the offer for.

3. Change the status to **Prepare Offer to Extend and click "Next."** The Confirm status change window will popup. **Click "Move Now**" on the Confirm status change popup window. The offer is created with some fields pre-populated with information from the job requisition.



Complete the Offer card

You must complete the Offer card before you can submit the offer for approval.

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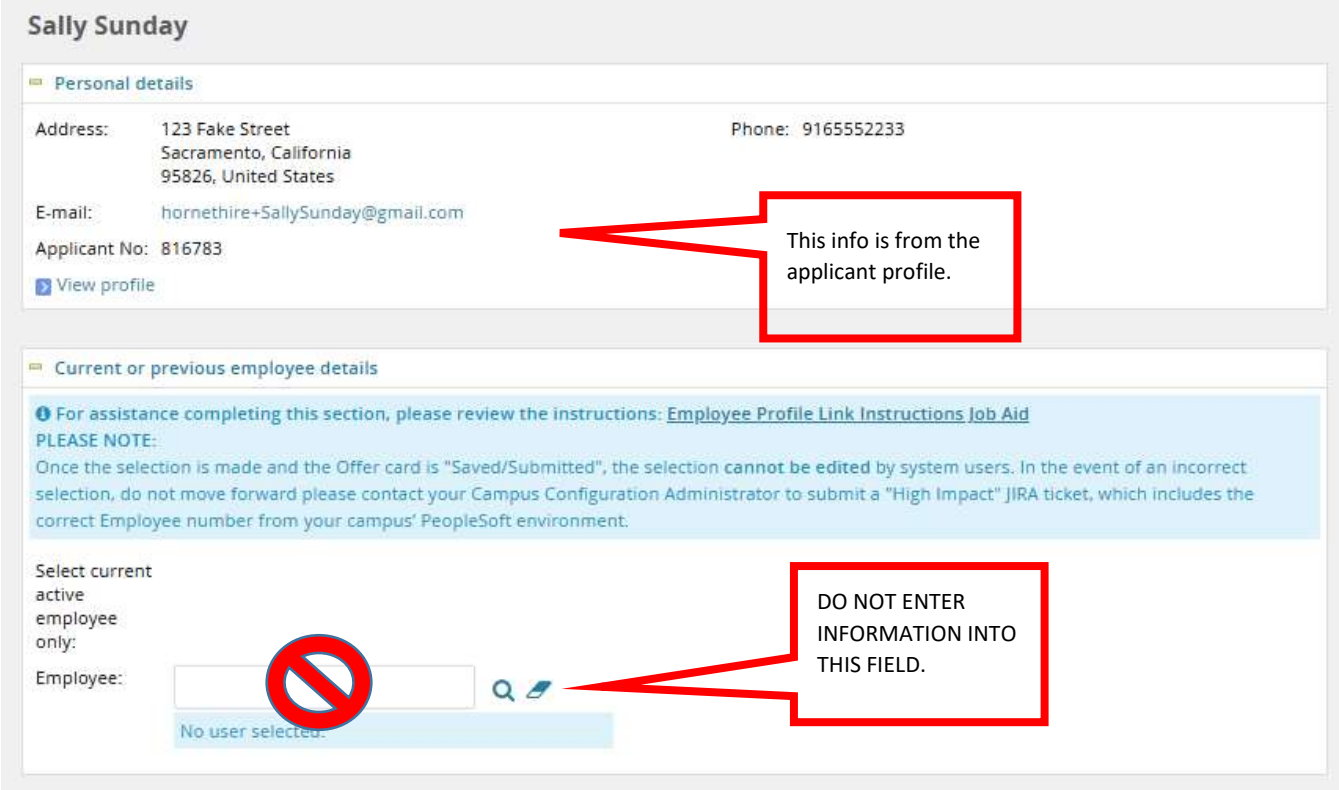
How to complete the Offer card

1. Complete the fields on the Offer card by using the following screen captures and data tables.

Offer card - Personal, Job, Offer details sections



The Personal details, Job details, and Offer details sections are pre-populated. You cannot edit most of them. The values for these fields are drawn from the Job card and Applicant card. If there are multiple vacancies on the job card, you are able to select which one you want for the specific candidate you are working on.

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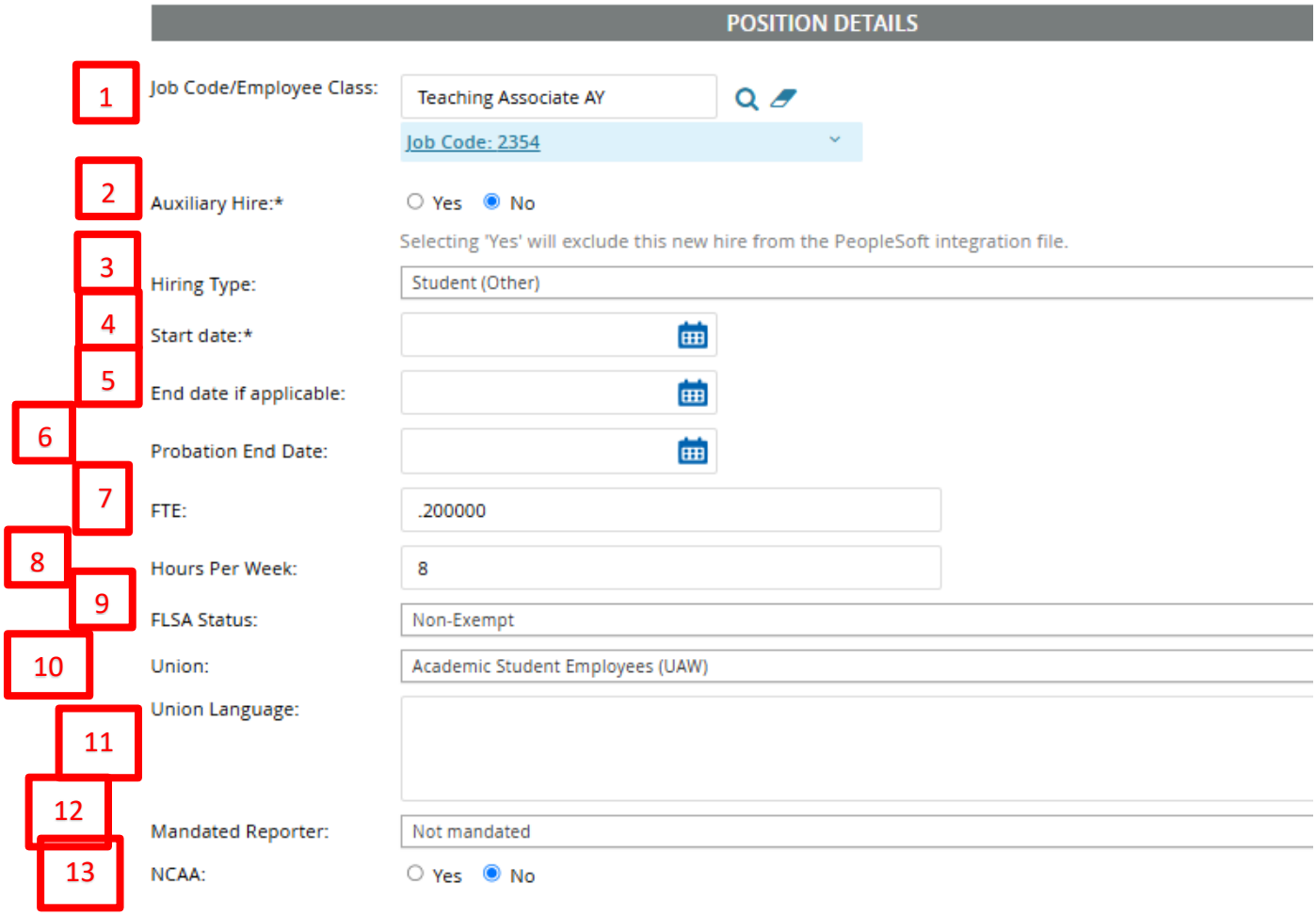
Offer card – Position Details section 1



#	Field	Information
1	**Job Code/Employee Class**	The job code is auto populated from the job card. You can expand the blue box to view information about this job code.
2	**Auxiliary Hire***	This field is auto populated from the job card. "No" should always be checked, as we do not hire Auxiliary positions in Page Up.

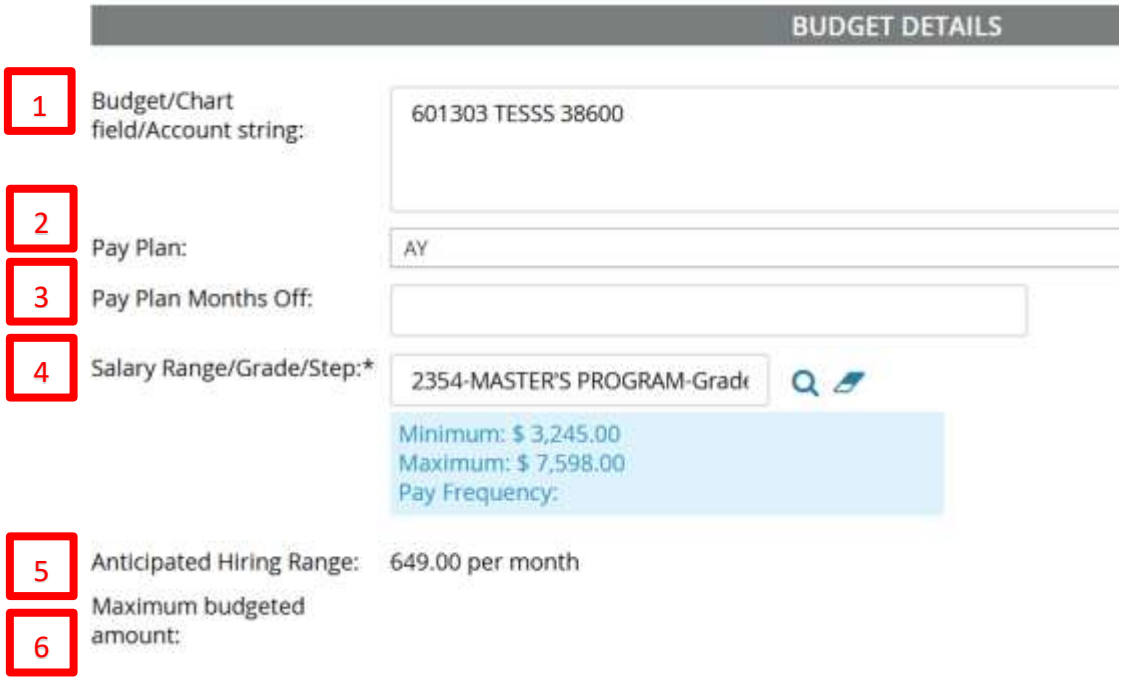
#	Field	Information
3	**Hiring Type**	This field is auto populated from the job card.
4	**Start date:***	Use the calendar to enter the tentative start date. This date drives the new hire onboarding tasks. (This date may be changed by the Office of Graduate Studies or Student Employment Office once the offer has been accepted)
5	**End date:**	Enter the end date of this appointment.
6	**Probation End Date:**	Leave blank.
7	**FTE:**	This field is auto populated from the job card. Full-time equivalence: Enter a decimal value from 0 to 1. Example: 20 hours/week is 0.5 FTE.
8	**Hours Per Week**	This field is auto populated from the job card.
9	**FLSA Status:**	This field is auto populated from the job card.
10	**Union**	Select the union from the drop-down menu. Select “Academic Student Employees (UAW)
11	**Union Language**	Leave blank
12	**Mandated Reporter**	This field is auto populated from the job card.
13	**NCAA**	If Yes, then campuses would need to provide language in offer letters via Offer Template for applicable NCAA appointments.

Offer card – Position Details section 2

#	Field	Information
1	**Sensitive Position**	If the student employee will need a background check or live scan because they have access to level 1 data, contact with minors, criminal records or medical information, please select the third option in the drop-down menu that indicates it is a sensitive position.

#	Field	Information
2	**Conflict of Interest**	Designates whether the applicant must complete a Conflict of Interests form and attend training. For Unit 11 hiring, select "None."
3	**Concurrent Hire:**	Select **Yes** if the applicant is going to be working multiple positions concurrently.
4	**Rehired Annuitant:**	Select **No.** No Unit 11 employee should be a retired annuitant.

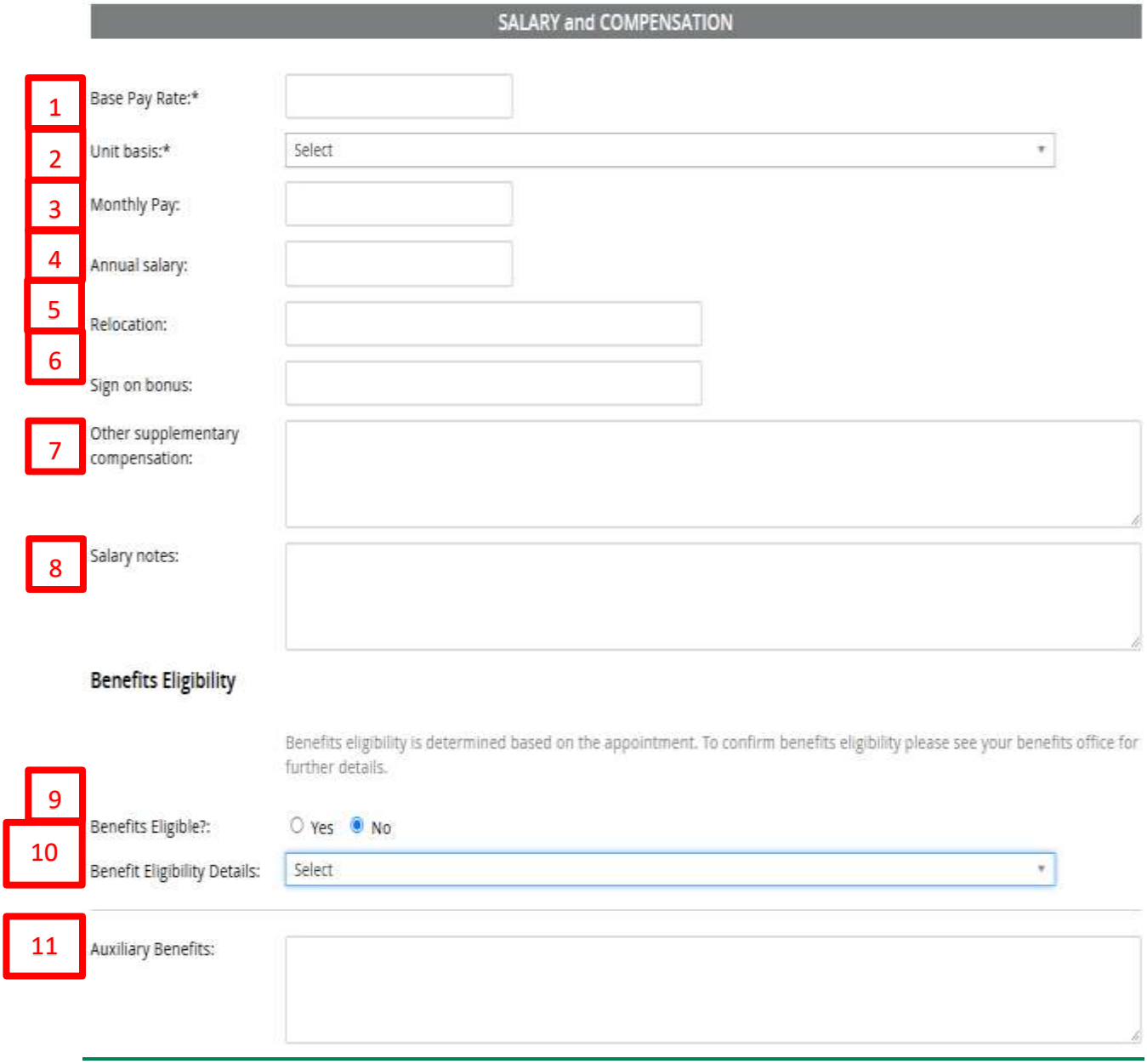
Offer card – Budget Details



#	Field	Information
1	**Budget/Chart field/ Account String**	**This field is used by Budgets.** Enter chart string information including the Department, Fund, Program or Project, Class and % Distribution.
2	**Pay Plan:**	Select the applicable Pay Plan. For Unit 11 position, select "AY" for Academic Year.
3	**Pay Plan Months Off:**	Leave blank.
4	**Salary Range/Grade:***	This field is auto populated from the job card. The range selection is determined by the system- wide classification standards.

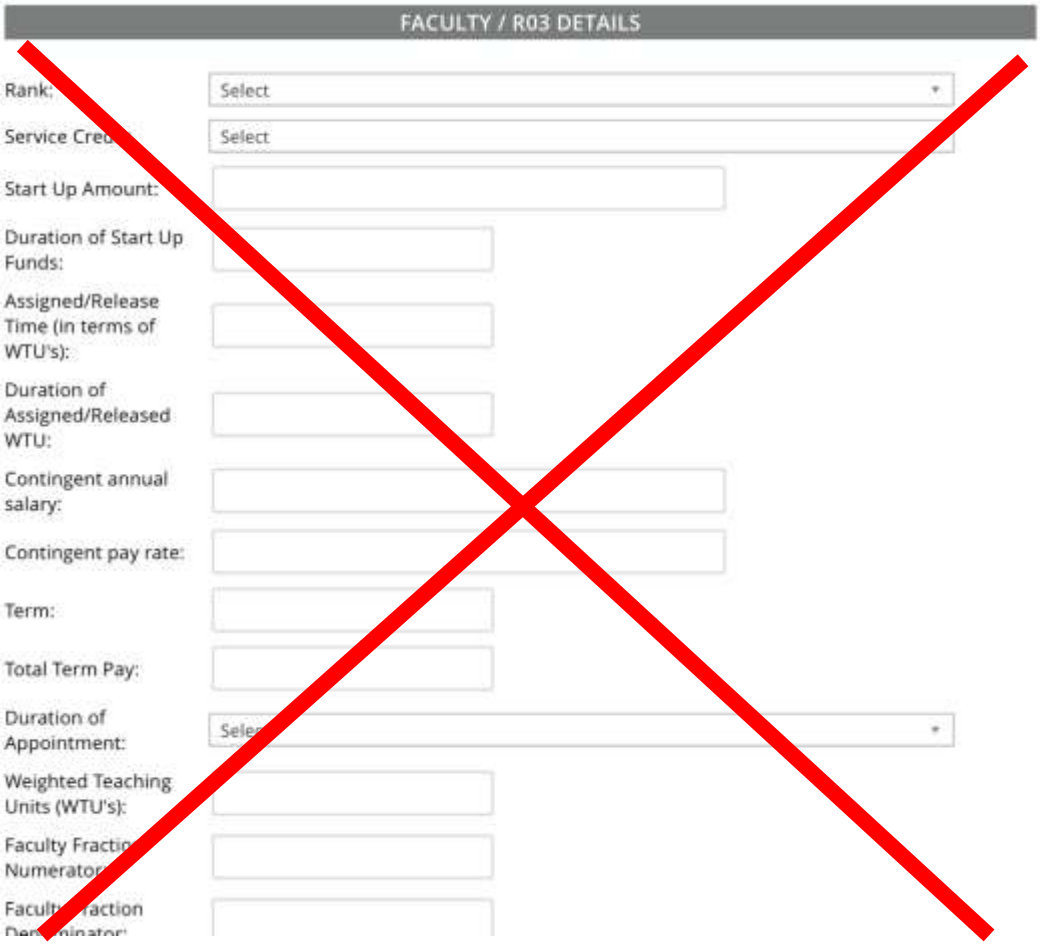
#	Field	Information
5	**Anticipated Hiring Range:**	Use this field to specify the campus-specific hiring salary range. This is usually used by the Budget Office to determine if the offer can be approved or not.
6	**Maximum budgeted amount:**	**This field is used by Budgets.** Please leave blank.

Offer card – Salary and compensation



#	Field	Information
1	***Base Pay Rate:***	This field is required for all hires. Please enter the full time, monthly pay rate for GAs and TAs, and the hourly rate for ISAs. For example, if a TA will be paid $649 per month at a 0.2 FTE, or 8 hours per week, enter $3,245. CHRS will calculate the base pay rate multiplied by the FTE. ($3,245 x 0.2 = $649)
2	***Unit basis:***	This field is required for all hires. Select the basis from the drop-down menu. Select "Monthly" for GAs and TAs, and Hourly for ISAs.
3	**Monthly Pay:**	The desired monthly pay for the position. Leave blank for ISAs.
4	**Annual salary:**	Leave blank.
5	**Relocation:**	Leave blank.
6	**Sign on bonus:**	Leave blank.
7	**Other supplementary compensation**	Enter if applicable. If not, leave blank.
8	**Salary Notes**	Free text field designed to record any salary related information.
9	**Benefits Eligible**	Select No.
10	**Benefit Eligibility Details**	Do not make a selection
11	**Auxiliary Benefits**	Leave blank.

Offer card – Faculty / R03 Details



This section is not applicable for Unit 11 offers. Please skip.

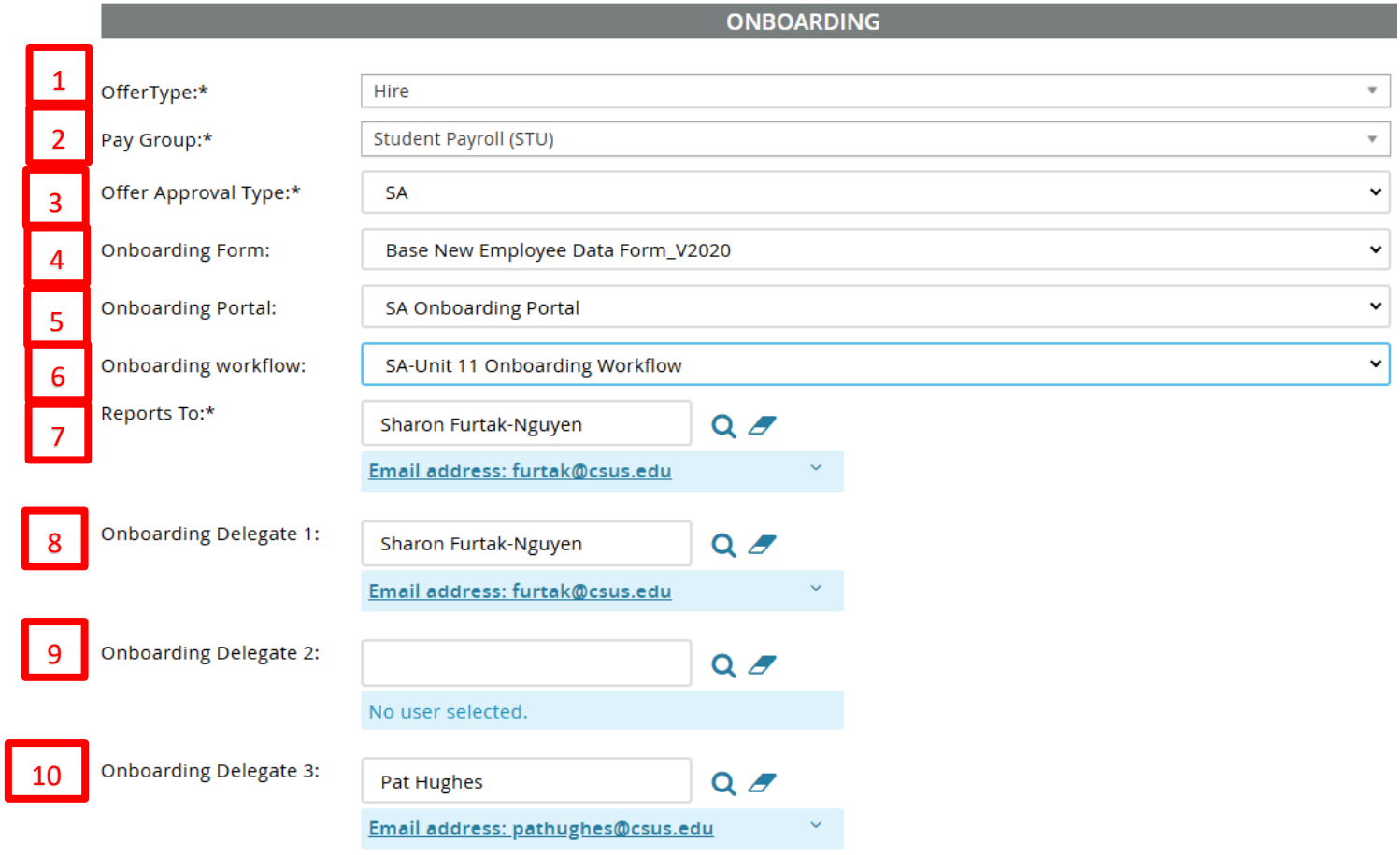
Offer card – Education and License Verification

This section is completed by Employment Services after the approval process. Please skip.

Offer card – Employment Checks

This section is completed by Employment Services after the approval process. Please skip.

Offer card – Onboarding



#	Field	Information
1	**Offer Type***	Select from the drop-down menu. This field integrates with PeopleSoft Job Data, Action/Reason field. Use “Hire” for initial appointments and “Rehire” if the student is returning to a previously held position.
2	**Pay Group***	Select from the drop-down menu. For Unit 11 employees, please select Student Payroll (STU). This field integrates with the PeopleSoft Payroll, Pay Group field.

#	Field	Information
3	**Offer Approval Type***	This field determines the Offer Approval Process used to approve the offer card. Select **"SA"** from the drop-down menu.
4	**Onboarding Form**	This field refers to the New Hire Starter Form. This is a shared form across the system. If the student is a current employee or has previously worked for Sac State within the last 12 months, do not make a selection. Otherwise, select the **"Base New Hire Data Form_V2020."**
5	**Onboarding Portal**	This field determines the Onboarding Portal used to approve the offer card. Select **"SA Onboarding Portal"** from the drop-down menu.
6	**Onboarding Workflow**	This field determines the Onboarding Workflow used to approve the offer card. Select **"SA-Unit 11 Onboarding Workflow"** from the drop-down menu.
7	**Reports to:***	This is auto populated from the Job Card. This person gets notification of offer acceptance and onboarding task progress. Enter or search for the appropriate user.
8-10	**Onboarding Delegate(s)**	Back-up for the Reports To person who can perform the same onboarding tasks if necessary. Enter or search for the appropriate user. If an onboarding delegate is specified, both hiring manager and delegate receive email reminders for onboarding tasks.

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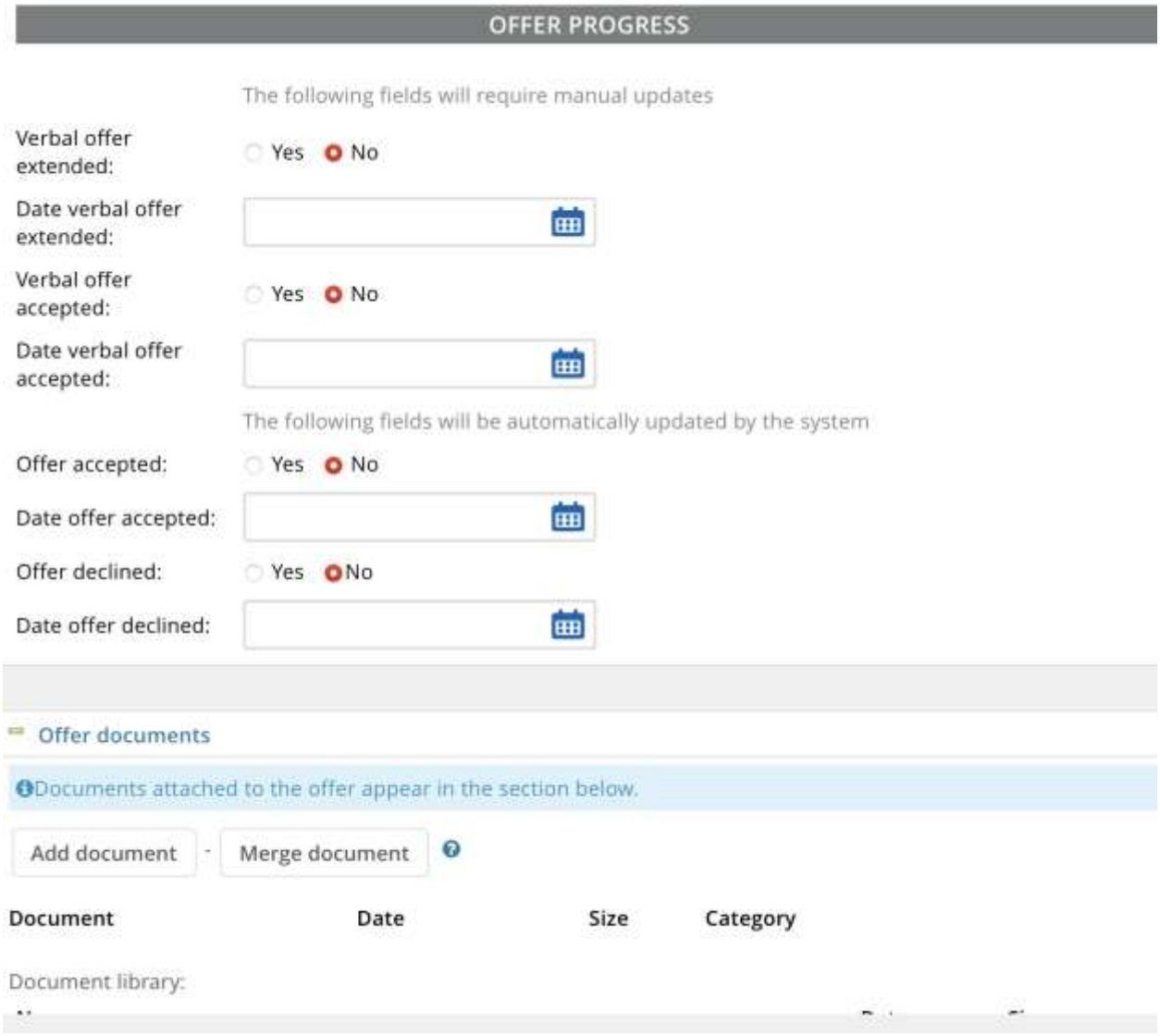
Offer Progress

This section is completed by Employment Services. Please skip.



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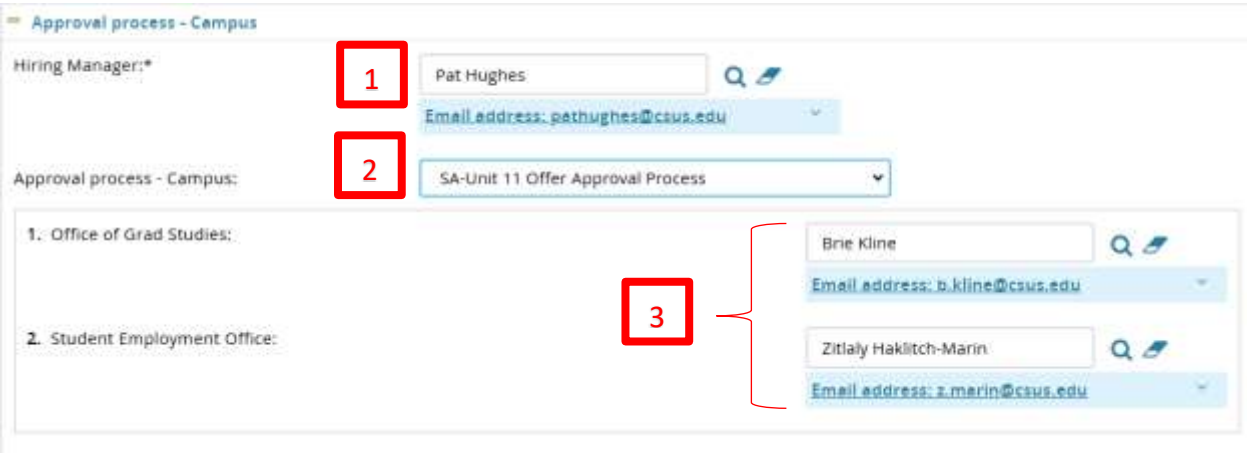
Offer card – Approval Process



#	Field	Information
1	**Hiring Manager**	This field shows the originator of the offer. Change this field only if you are changing ownership of the offer process.
2	**Approval process**	There are two options for Unit 11 offers. "SA-Unit 11 Offer Approval Process" for domestic students and "SA-Unit 11 International Student Offer Approval" for international students.
3	**Approvers**	Do not adjust listed approvers.

Offer card – Submission

After all necessary fields on the Offer Card are filled and an approval process is selected, click "Submit" at the bottom of the Offer Card window. This will initiate the offer approval process and send a notification to the approver first in queue.

What happens next/Submitting Recruitment Documents

- The offer approval process begins.
- After offer is approved instructions will be given to student being offered the Unit 11 position to 1) Accept the offer in PageUp, 2) Complete the Base New Employee Data

form if not a previous Sac State employee and 3) complete new hire paperwork and I-9 verification with the Student Employment Office.

- If the new hire is an international student, additional instructions will be given instructing the student to obtain a Social Security Card.
- Your Employment Services team will assist with the offer process and onboarding.
- Departments must check the student's applicant status to determine when the department can move forward with submitting TAE transaction. For new hires, the application status will be "appointment notification accepted, form completed". For rehires, the application status will be "formal offer accepted".

Revise an offer

If the applicant wants to renegotiate the offer, or if other changes are required, the offer must be revised.

Revising the offer requires two application status changes for recording purposes and to trigger the actions needed for the revision.

How to Revise an offer

1. Set the application status to **Revised offer**.
2. Renegotiate the offer with the applicant.
3. Set the application status to **Prepare offer to Extend**.
4. Update the offer card.
5. Resubmit the offer for approval.

Free a position after a declined offer

If you want to make an offer to an applicant after another applicant has already declined the offer, you see a message indicating that no positions are available.

Only administrators can remove the offer. Removing the offer also removes all records of the offer.

You need to be able to free up the position so that you can make an offer to another applicant without removing the offer.

To do this, you can:

- Free the position
- Create another position

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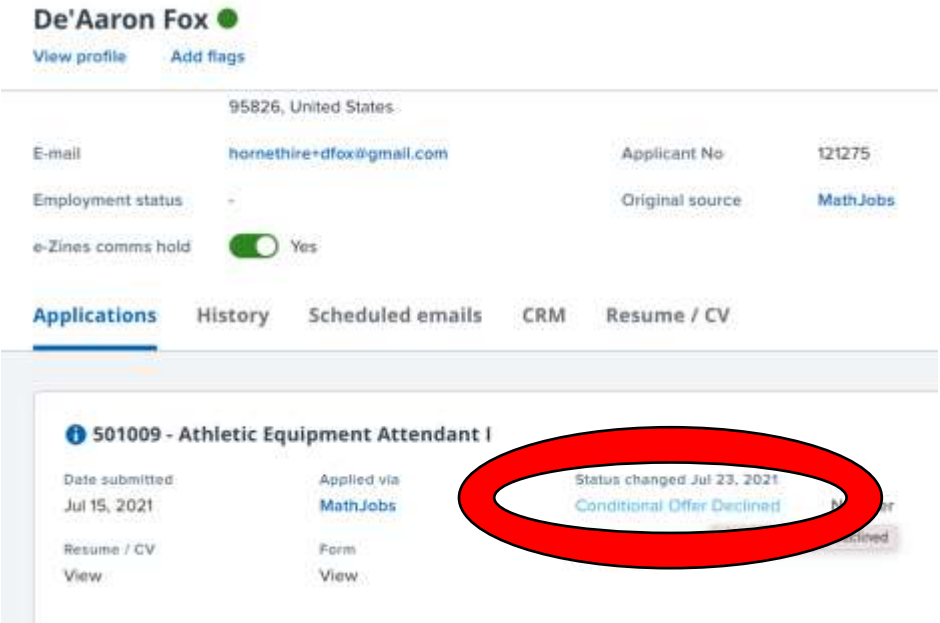
When to free a position

- You have made an offer to an applicant, who has declined the offer.
- You want to make an offer to another applicant.

How to free the position

1. Open the job requisition.
2. Click on the name of the applicant who declined the offer. The Applicant card opens.

3. On the Applicant card, click the Offer declined status.



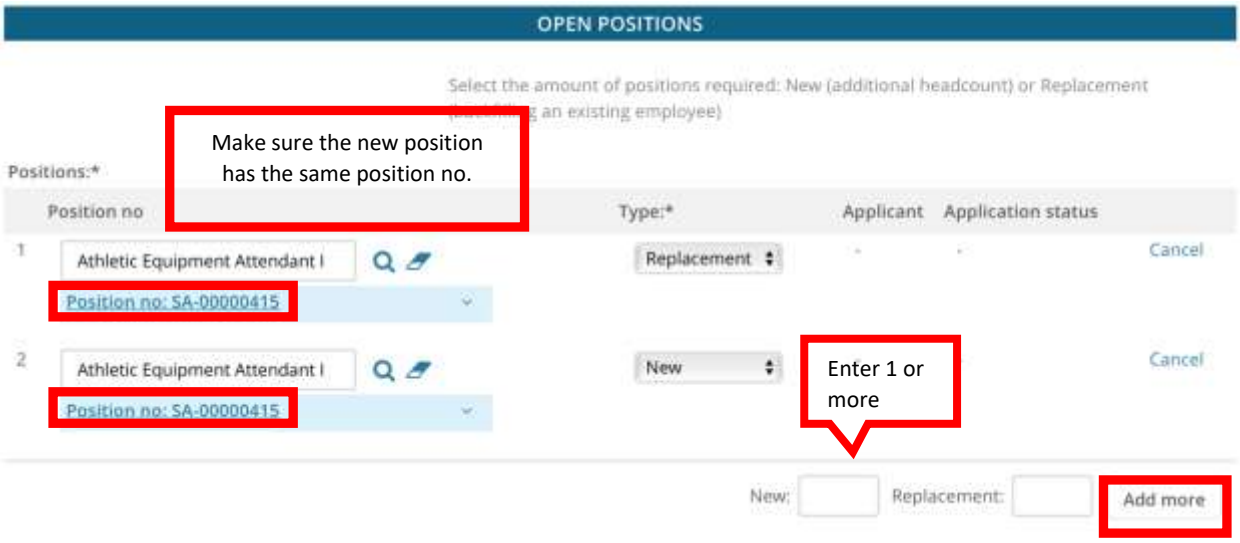
The offer card opens up.

4. Click **Save & Close** at the bottom of the Offer card.
5. Click **Done** to close the Applicant card.
6. Refresh the job requisition to confirm that the position is free.

How to create another position

If freeing the position does not work, you can work around the issue by creating another position.

1. Open the job requisition.
2. In the **Number of Positions** section, enter "1" in the **New** or **Replacement** field.
3. Click **Add more**.
4. Enter the same position number in the Position no field, then click the Magnifying glass to ensure the blue box is filled.



5. Click **Submit & Exit** at the bottom of the job requisition.

Approval

If you use the same position number, you do not need to submit the new position for approval; the position was already approved.

What happens next

- The history of the declined offer is maintained on the Applicant card.
- You can move a candidate to the Prepare Offer status.

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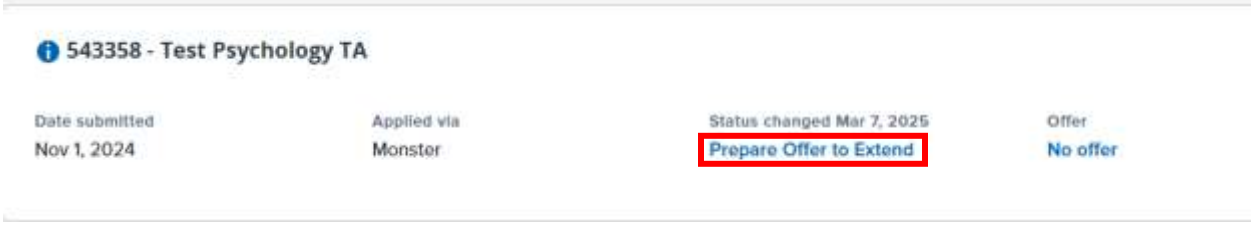
Appendix A – Exemption Requests

Occasionally there is need to request an exemption from some requirements related to Unit 11 hiring. There is an exemption request process built into PageUp to submit such a request. In order to submit an exemption request to the Office of Graduate studies, please follow these steps below:

1) Move Application Status to "Exemption Request Submission"

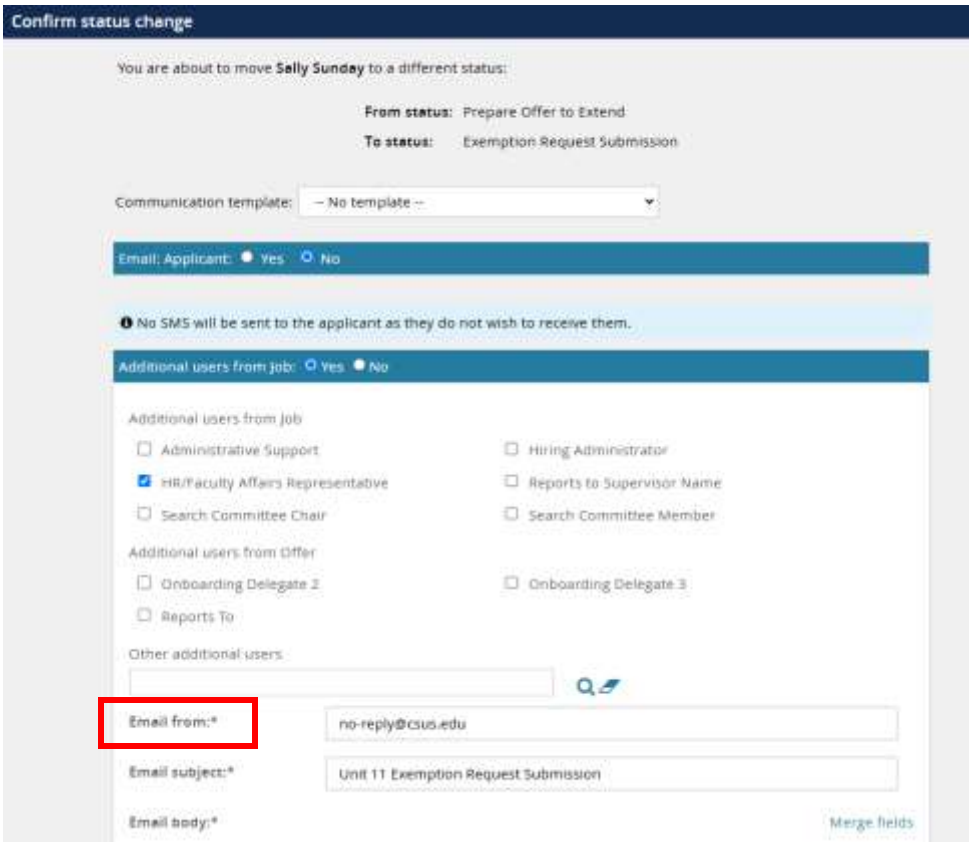
- Open the Applicant Card of the desired applicant in need of an exemption request. Click on the current application status in the job tile in question:



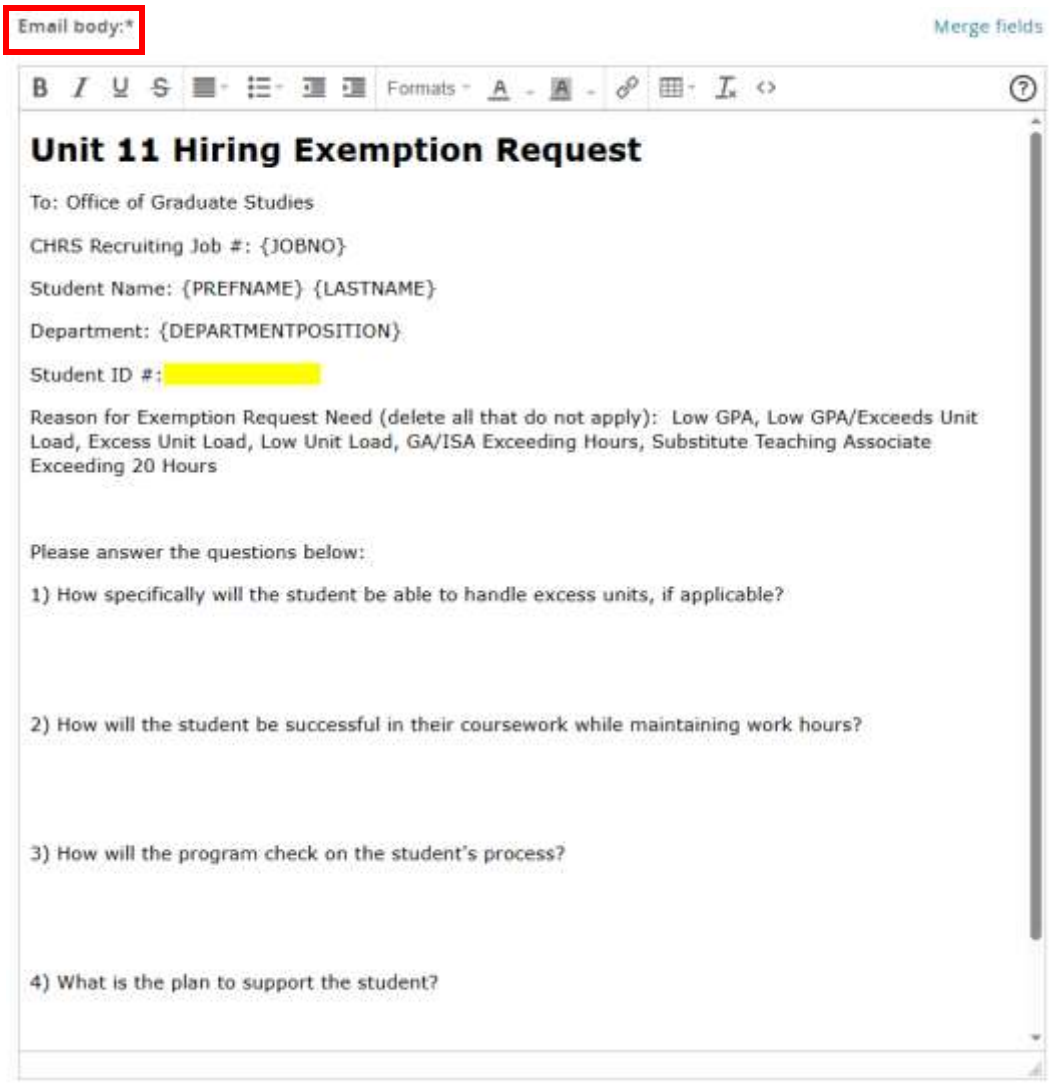
- The Change application status window will pop up. Select "Exemption Request Submission" and click "Next."

2) Complete form on Confirm Status Change window

- The Confirm status change window will pop up with several fields. Change the "Email From" field to your email address:

- 

- Do not change other radio buttons unless you want additional users copied on the form.
- The form is housed in the Email Body field of the window. Read the instructions and questions carefully and answer all that apply.



- You can expand the email body window with the dotted triangle in the bottom right corner of the field:

- When complete, click “Move now” on the bottom of the window. The form will be routed to Office of Graduate Studies for review.

3) Check your email and candidate’s application status for results of OGS review. OGS will review and then update the application status to either “Exempt Request Approved” or “Exemption Request Denied”.