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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.
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 [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)

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)

<table>
<thead>
<tr>
<th>Search</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>

Background Check

1. Please refer to [Initiate and Manage Background Checks – Faculty](#)
Prepare the Offer

Log into CHRS Recruiting
3. Navigate to one.SJSU
4. Search for or click the CHRS Recruiting tile
5. 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.*

1. From the tiled dashboard, click Jobs (A)

Select the Applications for the Job
2. Click the hyperlinked number (A) of applications for the job for which you wish to make an offer
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3. Change the View 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); if the candidate has already been moved to Prepare Offer you can click the hyperlink underneath the job title (C)

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)
Move the Candidate to the Prepare Offer and Upload Transcripts status

1. Select the step in the status list (A)
2. Click Next (B)
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 for a tenured/tenure-track/FT temp recruitment, select Yes (C); DO NOT CHANGE THIS FOR PT TEMP RECRUITMENTS
6. Click Move now (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)
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.
Verify and update the Position Details

6. Verify the job code and hiring type (A)
7. Enter the Start date; enter the Probation 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)

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
Update the Salary and Compensation information

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

Complete the Faculty/R03 Details

13. Select the Rank for Tenured/Tenure-Track recruitments (A)
### 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

<table>
<thead>
<tr>
<th>EDUCATION and LICENSE VERIFICATION</th>
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<tbody>
<tr>
<td>Please note that you must use the appropriate reference workbook to enter the correct Major, Institute and 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.</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Highest Level of Education:</th>
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<tbody>
<tr>
<td>Select</td>
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<table>
<thead>
<tr>
<th>Degree Type:</th>
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<tbody>
<tr>
<td>Select</td>
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<table>
<thead>
<tr>
<th>Terminal Degree for Discipline:</th>
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</thead>
<tbody>
<tr>
<td>☑ Yes ☐ No</td>
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<table>
<thead>
<tr>
<th>Date of Completion:</th>
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<table>
<thead>
<tr>
<th>Major Code:</th>
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<tr>
<th>Institute Code:</th>
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<tr>
<th>License/Certification Code:</th>
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<th>License/Certification Number:</th>
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<th>License/Certification Expiry Date:</th>
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<tr>
<td>21. When applicable, enter the License or Certification Code for the candidate (H)</td>
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<tr>
<td>22. Enter the number of the license or certificate (I)</td>
<td></td>
</tr>
<tr>
<td>23. Enter the expiration date of the license or certification (J)</td>
<td></td>
</tr>
</tbody>
</table>

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.
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.

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 required for current employees
28. Select SJ Onboarding Portal as the Onboarding Portal (F); this is 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
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 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

32. The Verbal Offer information is optional but may be entered if you wish to track the information (A)
33. The date the candidate accepts or declines the offer will be updated by the system (B)

Manage the Offer documents

34. If you have the required transcripts or other documents for the candidate, you may click Add document to upload them here (A); they can be uploaded later if need be
Submit the offer card

35. The Offer Check section is not used (A)
36. Confirm that your name is in the Originator field (B)
37. The Approval 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)

You will receive confirmation that your offer card has been saved

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

<table>
<thead>
<tr>
<th>Submitted Status</th>
<th>Applicant Nc Pref Name</th>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun 25, 2020 New Application</td>
<td>Tester</td>
<td>Testy</td>
<td></td>
</tr>
<tr>
<td>Jun 21, 2020 Phone/Video Interview Unsuccessful</td>
<td>Adi</td>
<td>Alsaid</td>
<td></td>
</tr>
<tr>
<td>Jun 21, 2020 Prepare Offer and Upload Transcripts</td>
<td>Christine</td>
<td>Son</td>
<td></td>
</tr>
<tr>
<td>Jun 25, 2020 Prepare Offer and Upload Transcripts</td>
<td>Sparty</td>
<td>Spartan</td>
<td></td>
</tr>
</tbody>
</table>

**A**

### Move the candidate to the new status

1. Select Formal Offer Extended from the status list (A)
2. Click Next (B)
Confirm the status change and notify the candidate

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.

You will also see a message reminding you that the candidate will be notified at this step (B).

1. Review the email and update if necessary (C)
2. Click Move Now (D)

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.

The Offer Card displays

Scroll to the Offer documents section

3. Click Add document to upload the signed offer letter (A)

Please note, if you did not upload transcripts when the offer was prepared, you should upload them now.
Upload the signed offer letter

1. Click Upload file to find the document (A)
2. Select Offer Letter – Non Confidential for the Document category (B)
3. Give the document a title if desired (C)
4. Click Save and close (D)

The offer letter appears in the Offer documents section (A)

Submit the offer card (A)

The application status has been updated (A)

Assistant Professor - Steyer (497062)
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.

View the offer

1. The candidate will see a highlighted box with a link to view the offer (A)

Accept the offer

2. The candidate sees a message letting them know they are required to view the letter to accept the offer (A)
3. The candidate clicks the link to download the offer letter (B)
4. The candidate must check that they agree to the terms of the offer (C)
5. The candidate must push the I AGREE button; it will display once the letter is downloaded AND the checkbox is checked (D)

Once they agree to the offer, if applicable, they will be prompted to complete the Base New Hire Data Form.
The application status is updated once the offer is accepted and the base form is completed. (A)

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.

### 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.