

NEOGOV™

Requisitions 101

Training Guide

Access NeoGov

- neogov.com
- If you have already set up your password, you will not need to reset it.
- If you need access, your account has not been activated, or you need to reset your password, contact Breanna Baeza bbaeza@csusb.edu
- Please check your junk mail for an email directly from NeoGov.com and reset your password within 24 hours.

The email will contain instructions similar to the following:

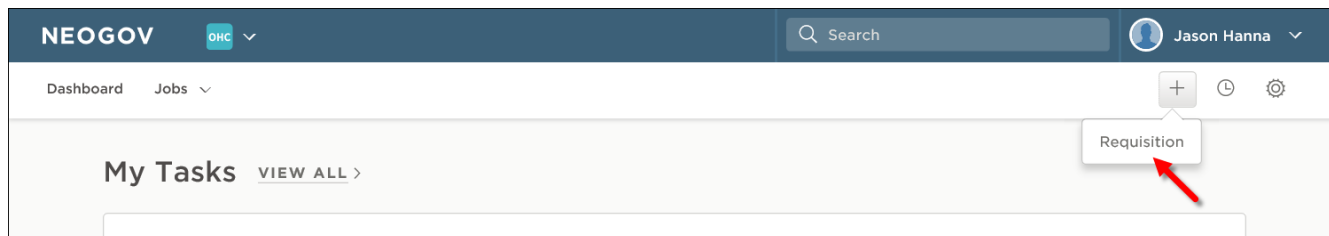
- Passwords will need to meet the following requirements:
- Length of 8 or more characters
- Contain a number
- Contain a special character, for example !, @, #, \$, %, ^, &, *
- Contain an upper and lowercase letter

Open a New Requisition

- When a hiring department has an open position, they'll submit a requisition as a request to fill the vacancy.
- Below is the first of two navigation paths to start up the process of creating a requisition.

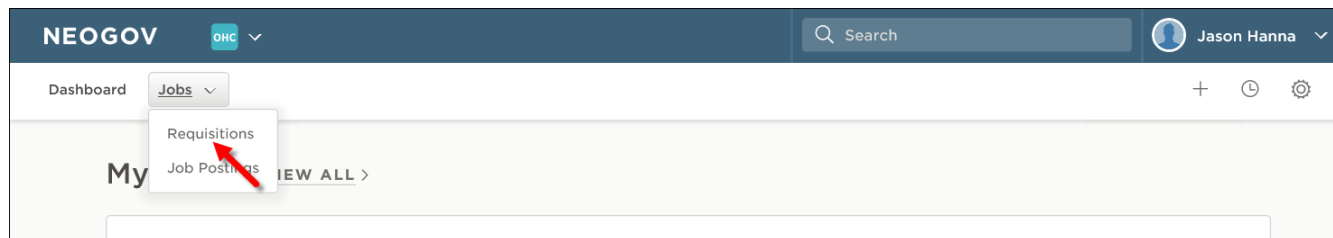
Navigation Path 1

- On the Add New menu [+], click Requisition. This can be done from any page.

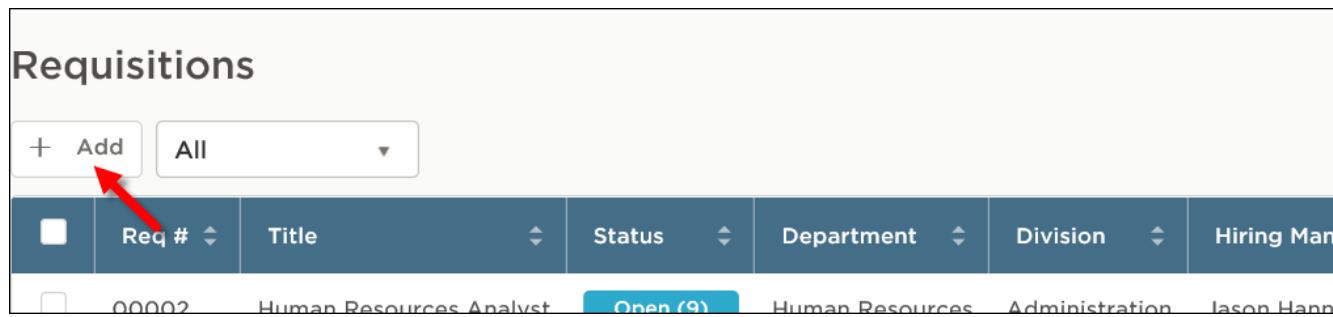


Open a New Requisition (Part 2)

- **Navigation Path 2**
- On the Jobs menu, click Requisitions.



- Then click Add.



Steps to Create a Requisition

- The first of three requisition form pages will display.

Requisition Details

Requisition # [Assigned when requisition is saved]	Department/Division * Information Technology
Class Spec * ⓘ IT Project Manager (1159)	Working Title IT Project Manager
Desired Start Date 11/01/2017	Hiring Manager * Jason Hanna Find a hiring manager
Job Type Full Time	List Type Regular
Number of Vacancies 1	

Position Details

New Position?
 Yes No

Position # * 000361	Vacancy Date 11/01/2017
------------------------	----------------------------

Delete

Choose your Class Code

- Please choose the class code based on the position you are looking to fill or the transaction you are placing.
- If you are hiring for a position choose the class code of the position the incumbent will be placed into, otherwise chose the code that the incumbent is currently serving in.
- If the class spec you need is not listed, please send an email to Joseph Ornelas (joseph.Ornelas@csusb.edu) who will update the system for you.

Select a Class Spec Cancel

2016-F0032	Academic Advisor/ Talent Search Pr...
2017-F0010	Academic Advisor/ Talent Search Pr...
2866-3	Accompanist II
2866-8	Accompanist II
1762-1	Accountant I
4555-1	Accountant II
4556	Accountant III
1733-1	Accounting Clerk
1730	Accounting Technician I
1741-1	Accounting Technician II

<< < 1 2 ... > >> Items per page 10 ▾
Showing 1 - 10 of 449 items

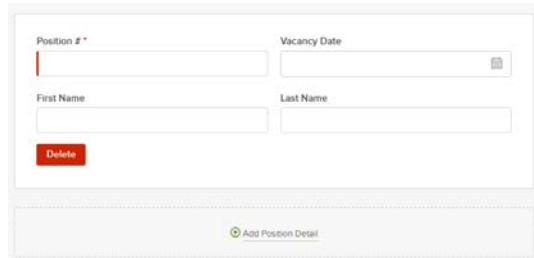
Choose your Class Code

- Have you selected the correct class spec? There's a way you can check. From the Class Spec field, click the selected job title to have a closer look. After your review, click Close.

The screenshot shows the 'Create Requisition' form with a 'Class Spec Details' pop-up window. The form has two steps: '1. CREATE' and '2. APPROVALS'. The 'Requisition Details' section includes a 'Requisition #' field with a placeholder '[Assigned when requisition is saved]' and a 'Class Spec' field with a dropdown menu showing 'IT Project Manager (1159)'. The 'Class Spec Details' pop-up window has a 'Close' button and two tabs: 'Description' and 'Benefits'. The 'Description' tab is active, showing the following text: 'Plan, initiate, and manage information technology (IT) projects. Lead and guide the work of technical staff. Serve as liaison between business and technical aspects of projects. Plan project stages and assess business implications for each stage. Monitor progress to assure deadlines, standards, and cost targets are met.' Below this is the 'Examples of Duties' section, which includes a bullet point: '• Manage project execution to ensure adherence to budget, schedule, and scope.'

Create New Requisition

- Each requisition should include all required fields as well as:
 - Desired Start date
 - Working Title: Transaction Reason and Employee Name (i.e. Emergency Hire for empl: John Doe)
 - Number of Vacancies
 - Division and Department (if your department is not listed, please contact Breanna)
 - Hiring Managers (those who should be included from your department – committee members)
 - Job Term: Full-time, Part-time, Hourly
 - Regular: Staff, Transfer: Faculty, Promotional: UEC
 - Position Type: New or Existing
 - Position Control: You must include a position number for each requisition entered into NeoGov.



The screenshot shows a web form with the following fields and elements:

- Position # *
- Vacancy Date
- First Name
- Last Name
- Delete (red button)
- Add Position Detail (link)

- Comments: Can be used to state the purpose for the requisition, list the committee for a recruitment or include pay information.

Create New Requisition (cont.)

- Proposed Salary: please include the hourly or monthly salary depending on type of position
- Annual Salary: should be used to include annual salary including benefits if applicable
- Source of Fund: State General Fund or Other Funding Source
- New Funding: Yes or No option
- Justification of Position: this field was adopted directly from the original PAR and can be used to add justification for department or cabinet review
- If completing any type of transaction other than a recruitment please complete the:
 - Employee Name
 - Employee ID#
- Temporary expiration date: to be used for any temporary requisition, can be the temp end date for an extension or new temp position
- Probationary end date: Please include if looking to hire for a permanent position
- Funding Source: Dept ID, Fund, Account, Class, Program, Unit: This is a mandatory field and should be completed along with the Position Control field.

Transaction Reasons

- The transaction reasons should be used for the following types of requisitions:
 - *Recruitment*: A job posting (Regular or Pool)
 - *Reassignment*: Used to reassign employee (usually temporarily as voluntary reassignment)
 - *Reclassification*: Position-level job reclassification to change Job Code (used to begin the reclassification process)
 - *Temporary Appointment*: Assign any employee to new temporary appointment or reappoint an active employee to a successive temporary appointment when no separation is posted. The length of the appointment period is limited by an expiration date or other condition of employment.
 - *Extend Temporary Appointment*: To extend a temporary appointment/ emergency hire (the appointment cannot be longer than the designated time allowed by the Bargaining Agreement).
 - *Temp to Prob./Perm Appt.*: Used to appoint a current employee who is changing from a temporary appointment to an appointment where the intent is that employment be regular and continuous.
 - *Pay Plan Change*: (e.g. 12/12 to 10/12, 11/12 or AY) with or without a change in department or class.
 - *In-Range Progression*: Used to process a salary progression within a grade. (Similarly to the reclassification reason this can be used to begin the process for an IRP).
 - *Salary Increase*: equity adjustment or temporary salary increase.
 - *Stipend*: Usually a one time stipend allotted for a specific project and not to be used long term.
 - *Conversion to Permanent*: Used to appoint a current employee who is changing from a temporary appointment to a permanent appointment where the intent is that employment be regular and continuous.
 - *Reinstatement from Temporary Reassignment*: Return to prior appointment upon expiration of temporary reassignment.
 - *Extend Temporary Reassignment*: Used to extend the duration/expiration date of a temporary promotion, temporary reassignment (not to be confused with Extend Temporary Appointment).
 - *Time Base Change*: Used to increase or decrease an employee's time base.
 - *Casual Worker*: Used to hire or extend the appointment of a Casual Worker. Be sure to have the employee submit an application to the Casual Worker pool prior to approval of requisition. Also, please list employee name in the requisition.
 - *Special Consultant*: Used to hire or extend the appointment of a Special Consultant. Be sure to have the employee submit an application to the Casual Worker pool prior to approval of requisition. Also, please list employee's name in the requisition.

Hiring Process

- Emergency Hire: an emergency appointment used to temporarily fill a vacant position, departments should be considering the next step for all emergency hire positions as they are short term
- Long-term temporary: following a recruitment or as part of an extension of current temporary position
- Permanent Staff Appointment
- MPP Appointment: Any transaction regarding an MPP position
- Express Hire: the department chair/director (MPP Employee's only) will conduct one-on-one interviews with candidates as this type of recruitment
- Casual Worker: a temporary position, not to be used for long term temporary assignments
- Special Consultant: to be used for temporary appointments of personnel (usually hired for a special project)

Approval Steps

- Once you've completed the form, click Save & Continue to Next Step.
- Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.
- On the Approval Group pulldown, click the applicable approval group.
- From the Approvers field, click the look up icon, select the applicable approvers, and then click Done.
- Click Add Approval Step.
- Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.
- Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop operation.

The screenshot displays a vertical list of approval steps. On the left, a vertical line with three circular markers labeled 1, 2, and 3 indicates the sequence. Step 1 is 'Budget' with approvers 'Richard Gonzales , + 1 more'. Step 2 is 'County Administrator' with approvers 'Maria Lee , + 1 more'. Step 3 is 'HR' with approvers 'Simon Davies , + 1 more'. A dashed box highlights the 'HR' step, and a red arrow points to it. At the bottom, there is a button labeled '+ Add Approval Group'.

Approvals

Personnel Requests- NEOGOV

President's Cabinet Approval

Permanent New Position

Any personnel transaction resulting in a pay increase above 5%

Discussion with President Morales

MPP equity or salary increases of any amount

Special consultants

Vice President Approval Only

Any permanent or temporary personnel transaction resulting in a pay increase of
5% or less

Replacement of vacated MPP and staff positions

Emergency hires, casual workers, hourly on-call hires

Conversion of Temporary to Permanent Positions

Extension of temporary assignments

HR Final Approval

- Please select the HR Manager assigned to your Department/Division from the following list.

Department/Division Distribution for Employment and Recruitment Transactions

(Revised 10/11/2017)

Cesar/Stacey	Rebecca /Candace	New Manager/New Processor	Angela / Aimee	Alex/Breanna
FACULTY SENATE CHAIR: Dr. Karen Kolehmainen	DEAN: Tatiana Karmanova College of Extended Learning (CEL)	DEAN: Dr. Jay Fiene COE-College of Education (including Jim & Judy Watson COE Student Services, Assessment & Research, Curriculum & Archives, Special Education, Rehabilitation, & Counseling, Teacher Education & Foundations, Educational Leadership & Technology)	VICE PRESIDENT/CFO: Dr. Doug Freer Administration & Finance (including Accounting Services, Accounts Payable, Auxiliary Financial Services, Budget, Capital Planning, Design & Construction, Environmental Health & Safety, Facilities Services, Human Resources, Parking & Transportation Services, Payroll, Printing Services, Property Management, Purchasing, Receiving & Mail Services, Risk Management, University Enterprises Corporation, University Police)	College of Business and Public Administration (CBPA)
DEAN: Dr. Sharon Brown-Welty PDC-Palm Desert Campus	DEAN: Dr. Peter Williams CNS-College of Natural Sciences (including Biology, Biochemistry, Chemistry, Computer Science & Engineering, Geological Sciences, Health Science & Human Ecology, Kinesiology, Mathematics, Nursing, Physics)	DEAN: Dr. Rafik Mohammed CSBS-College of Social & Behavioral Sciences (including Anthropology, Criminal Justice, Economics, Environmental Studies, Geography, History, ICDFR-Institute of Child Development and Family Relations, Political Science, Psychology, Sociology, Social Science, Social Work)	DEAN: Dr. Terry Ballman CAL-College of Arts & Letters (including Art, Communication Studies, English, Liberal Studies, Music, Philosophy, Theatre Arts, World Languages & Literature, RAFFMA-Robert And Frances Fullerton Museum of Art)	EXECUTIVE DIRECTOR: John Griffin UEC-University Enterprises Corporation (including UEC Accounting, Dining, Bookstore, UEC Human Resources, UEC Payroll, UEC Rideshare, Sponsored Programs)
PRESIDENT: Dr. Tomas Morales Office of the President	VICE PRESIDENT: Dr. Sam Sudhakar ITS-Information Technology Services (including Academic Technologies & Innovation, Administrative Computing & Business Intelligence, Enterprise Cloud Services, Information Security & Emerging Technologies, Technology Support Center, Telecommunications & Network Services)	DIRECTOR: Dr. Diane Podolske Community Engagement		EXECUTIVE DIRECTOR: Aaron Burgess (SMSU), Auxiliaries (including Association Students Incorporated, Santos Manual Student Union)
PROVOST AND VICE PRESIDENT, ACADEMIC AFFAIRS: Dr. Shari McMahan Provost's Office	DIRECTOR: Anneli Adams Center for International Studies & Programs (including Visiting Scholars, Study Abroad)	INTERIM DEAN & ASSOCIATE VICE PRESIDENT: Dr. Craig Seal US-Undergraduate Studies (including Academic Advising & Services, EOP-Educational Opportunity Program, SAIL-Student Assistance In Learning, Honors Program, Testing & Tutoring, Writing Center)		John M. Pfau Library
Academic Personnel	AVP: Cynthia Crawford Research and Sponsored Programs Administration	VICE PRESIDENT: Dr. Ron Fremont UA-University Advancement (including Development, Strategic Communication, Alumni)		Student Affairs
Dr. J. Paul Vicknair		Graduate Studies		
Notes: 1) For faculty transactions, contact Academic Personnel or Aimee Salazar 2) For student employment transactions, contact Rodrigo Mercado 3) HR Manager Back-up: Rebecca for Alex, Alex for Rebecca; Angela for New MPP, New MPP for Angela				

DeptID	Department	Division	Manager
AS0100	President's Office	President's Office	César Portillo / Stacey Barnier
AS0101	Institutional Research	President's Office	César Portillo / Stacey Barnier
AS0102	Ombuds Services	President's Office	César Portillo / Stacey Barnier
AS0103	Title IX & Gender Equity	President's Office	César Portillo / Stacey Barnier
AS0104	University Diversity Office	President's Office	César Portillo / Stacey Barnier
AS0105	Office of Govt & Comm Rel	President's Office	César Portillo / Stacey Barnier
AS0106	Special Events & Guest Svcs	President's Office	César Portillo / Stacey Barnier
BS0100	Student Affairs - VP	Student Affairs	Alex Cassadas
BS0120	Veterans Success Center	Student Affairs	Alex Cassadas
BS0130	Student Conduct & Ethical Dev	Student Affairs	Alex Cassadas
BS0300	Student Health Center	Student Affairs	Alex Cassadas
BS0310	Counseling & Psychological Svcs	Student Affairs	Alex Cassadas
BS0400	Enrollment Management	Student Affairs	Alex Cassadas
BS0410	Admissions & Stu Recruitment	Student Affairs	Alex Cassadas
BS0430	Registrar	Student Affairs	Alex Cassadas
BS0510	Housing & Residential Life	Student Affairs	Alex Cassadas
BS0530	Office of Student Engagement	Student Affairs	Alex Cassadas
BS0531	Orientation & First Year Exp	Student Affairs	Alex Cassadas
BS0700	Financial Aid & Scholarships	Student Affairs	Alex Cassadas
BS1000	Career Center	Student Affairs	Alex Cassadas
BS1100	Services to Stu W/Disabilities	Student Affairs	Alex Cassadas
BS1200	Athletics	Student Affairs	Alex Cassadas
CS0100	Academic Affairs - VP	Academic Affairs	César Portillo / Stacey Barnier
CS0120	Research & Sponsored Programs	Academic Affairs	Rebecca Christopher
CS0121	Research-Academic Admin	Academic Affairs	Rebecca Christopher
CS0124	Sponsored Program Admin	Academic Affairs	Rebecca Christopher
CS0126	Water Research Institute	Academic Affairs	Rebecca Christopher
CS0200	Academic Personnel	Academic Affairs	César Portillo / Stacey Barnier
CS0230	Teaching Resource Center	Academic Affairs	César Portillo / Stacey Barnier
CS0300	Academic Resources	Academic Affairs	César Portillo / Stacey Barnier
CS0400	Academic Programs	Academic Affairs	César Portillo / Stacey Barnier
CS0420	Academic Scheduling	Academic Affairs	César Portillo / Stacey Barnier
CS0500	Graduate Studies	Academic Affairs	Stacey Barnier
CS0600	CBPA - Dean's Office	Academic Affairs	Alex Cassadas
CS0603	CBPA-Inland Emp Ctr for Entre	Academic Affairs	Alex Cassadas
CS0610	CBPA - Acctg & Fin	Academic Affairs	Alex Cassadas
CS0620	CBPA - Management	Academic Affairs	Alex Cassadas
CS0630	CBPA - Marketing	Academic Affairs	Alex Cassadas
CS0640	CBPA - Pub Admin	Academic Affairs	Alex Cassadas
CS0650	CBPA - Info & Decision Sci	Academic Affairs	Alex Cassadas
CS0660	CBPA-Business Graduate Program	Academic Affairs	Alex Cassadas
CS0670	CBPA - Develop & Alumni Affrs	Academic Affairs	Alex Cassadas
CS0680	CBPA - Computer Resources	Academic Affairs	Alex Cassadas
CS0700	COE - Dean's Office	Academic Affairs	Stacey Barnier
CS0702	COE - Development	Academic Affairs	Stacey Barnier
CS0703	COE - Information Technology	Academic Affairs	Stacey Barnier
CS0704	COE - Doctoral Studies	Academic Affairs	Stacey Barnier
CS0711	COE - SpecEd Rehab&Counslg SRC	Academic Affairs	Stacey Barnier
CS0720	COE - Student Services	Academic Affairs	Stacey Barnier
CS0761	COE - TeacherEduc&Foundtn TEF	Academic Affairs	Stacey Barnier
CS0771	COE - Educ Leadership&Tech ELT	Academic Affairs	Stacey Barnier

DeptID	Department	Division	Manager
CS0800	CAL - Dean's Office	Academic Affairs	Angela Rivera
CS0808	CAL-Coyote Radio & Advertising	Academic Affairs	Angela Rivera
CS0810	CAL - Art Dept	Academic Affairs	Angela Rivera
CS0820	CAL - Communication Studies	Academic Affairs	Angela Rivera
CS0830	CAL - English	Academic Affairs	Angela Rivera
CS0840	CAL - World Lang & Lit	Academic Affairs	Angela Rivera
CS0850	CAL - Liberal Studies	Academic Affairs	Angela Rivera
CS0860	CAL - Music	Academic Affairs	Angela Rivera
CS0870	CAL - Philosophy	Academic Affairs	Angela Rivera
CS0880	CAL - Theatre Arts	Academic Affairs	Angela Rivera
CS0890	CAL - Fullerton Art Museum	Academic Affairs	Angela Rivera
CS0900	CNS - Dean's Office	Academic Affairs	Rebecca Christopher
CS0910	CNS - Biological Sciences	Academic Affairs	Rebecca Christopher
CS0915	CNS - Chemistry & Biochemistry	Academic Affairs	Rebecca Christopher
CS0920	CNS-Computer Sci & Engineering	Academic Affairs	Rebecca Christopher
CS0935	CNS-Health Sci & Human Ecology	Academic Affairs	Rebecca Christopher
CS0945	CNS - Mathematics	Academic Affairs	Rebecca Christopher
CS0950	CNS - Nursing	Academic Affairs	Rebecca Christopher
CS0955	CNS - Kinesiology	Academic Affairs	Rebecca Christopher
CS0960	CNS - Physics	Academic Affairs	Rebecca Christopher
CS0965	CNS - Geological Sciences	Academic Affairs	Rebecca Christopher
CS0970	CNS - Animal House	Academic Affairs	Rebecca Christopher
CS1000	CSBS - Dean's Office	Academic Affairs	Stacey Barnier
CS1005	CSBS - Anthropology	Academic Affairs	Stacey Barnier
CS1010	CSBS - Criminal Justice	Academic Affairs	Stacey Barnier
CS1015	CSBS - Economics	Academic Affairs	Stacey Barnier
CS1025	CSBS - History	Academic Affairs	Stacey Barnier
CS1035	CSBS - Political Science	Academic Affairs	Stacey Barnier
CS1040	CSBS - Psychology	Academic Affairs	Stacey Barnier
CS1045	CSBS - Sociology	Academic Affairs	Stacey Barnier
CS1060	CSBS - Social Work	Academic Affairs	Stacey Barnier
CS1100	CEL - Dean	Academic Affairs	Rebecca Christopher
CS1180	International Education	Academic Affairs	Rebecca Christopher
CS1200	Undergraduate Studies	Academic Affairs	Stacey Barnier
CS1202	US - Stud Support Svcs	Academic Affairs	Stacey Barnier
CS1206	US - Acad Svcs & Advising	Academic Affairs	Stacey Barnier
CS1210	US - Testing & Tutoring	Academic Affairs	Stacey Barnier
CS1220	US - Educ Opportunity Program	Academic Affairs	Stacey Barnier
CS1230	US - Testing & Tutoring	Academic Affairs	Stacey Barnier
CS1300	Community Engagement	Academic Affairs	Stacey Barnier
CS1400	Palm Desert Campus	Academic Affairs	César Portillo / Stacey Barnier
CS1500	Faculty Senate	Academic Affairs	César Portillo / Stacey Barnier
CS1800	Library-Admin	Academic Affairs	Alex Cassadas
CS1821	Library-Cataloging	Academic Affairs	Alex Cassadas
CS1822	Library-Collection Devel/Recv	Academic Affairs	Alex Cassadas
CS1823	Library-Elctrcn Res & Serials	Academic Affairs	Alex Cassadas
CS1824	Library-InterLibrary Loans	Academic Affairs	Alex Cassadas
CS1825	Library-Multimedia Center	Academic Affairs	Alex Cassadas
CS1826	Library-Public Services	Academic Affairs	Alex Cassadas
CS1827	Library-Special Collections	Academic Affairs	Alex Cassadas
CS1828	Library-Info Technology Dept	Academic Affairs	Alex Cassadas
DS0100	Administration & Finance	Administration and Finance	Angela Rivera

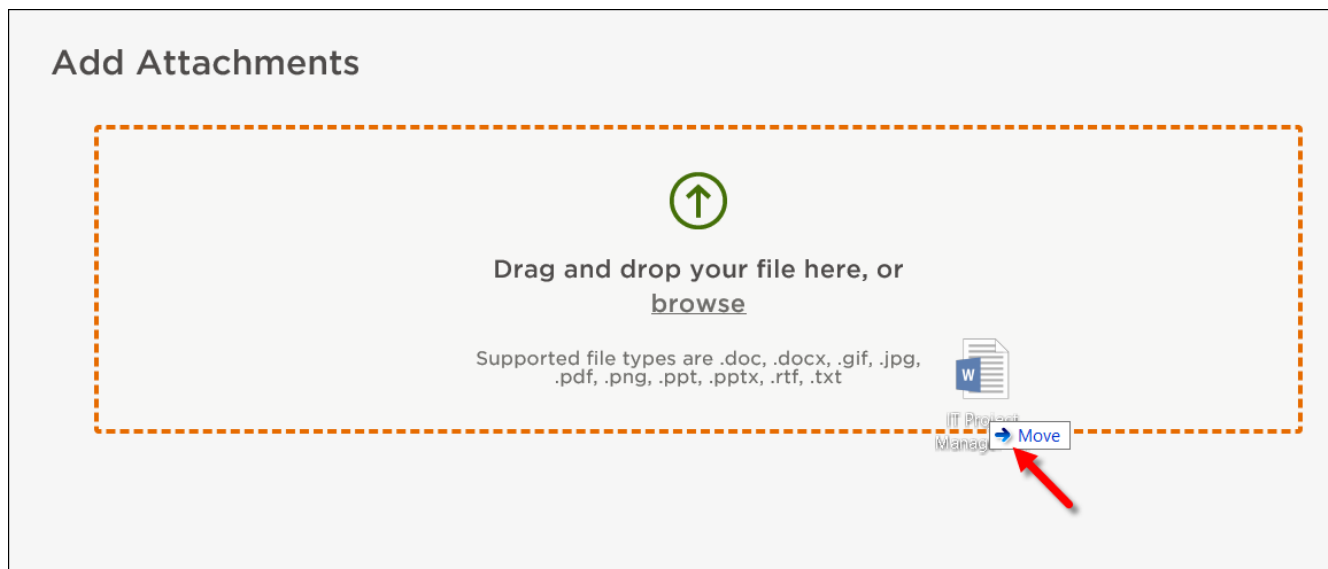
DeptID	Department	Division	Manager
DS0200	Accounting Office	Administration and Finance	Angela Rivera
DS0210	Accounts Payable Office	Administration and Finance	Angela Rivera
DS0240	Acctg - Student Financial Svcs	Administration and Finance	Angela Rivera
DS0270	Acctg - General Accounting	Administration and Finance	Angela Rivera
DS0280	Acctg - Reporting & Tax	Administration and Finance	Angela Rivera
DS0300	AVP Finance & Admin Services	Administration and Finance	Angela Rivera
DS0400	University Budget Office	Administration and Finance	Angela Rivera
DS0600	Human Resources	Administration and Finance	Angela Rivera
DS0620	HR - Payroll	Administration and Finance	Angela Rivera
DS0630	HR - Staff Development Center	Administration and Finance	Angela Rivera
DS0700	FM-Administration	Administration and Finance	Angela Rivera
DS0710	Facilities Planning	Administration and Finance	Angela Rivera
DS0720	Facilities - Planning & Mgmt	Administration and Finance	Angela Rivera
DS0722	FM - Building Maintenance	Administration and Finance	Angela Rivera
DS0724	FM - Grounds	Administration and Finance	Angela Rivera
DS0730	FM - Custodial Services	Administration and Finance	Angela Rivera
DS0740	FM - Heating & Air	Administration and Finance	Angela Rivera
DS0750	FM - Automotive	Administration and Finance	Angela Rivera
DS0810	SS - Printing Services	Administration and Finance	Angela Rivera
DS0820	Procurement & Contracts	Administration and Finance	Angela Rivera
DS0830	SS - Shipping & Receiving	Administration and Finance	Angela Rivera
DS0840	SS - Mail Services	Administration and Finance	Angela Rivera
DS0850	SS - Property Mgmt	Administration and Finance	Angela Rivera
DS0900	Auxiliary Accounting	Administration and Finance	Angela Rivera
DS0940	UEC - Human Resources	Administration and Finance	Angela Rivera
DS1000	Public Safety	Administration and Finance	Angela Rivera
DS1010	UP-Parking Admn	Administration and Finance	Angela Rivera
DS1300	Risk Management	Administration and Finance	Angela Rivera
DS1310	RM-Environmental Hlth & Safety	Administration and Finance	Angela Rivera
ES0100	University Advancement	University Advancement	Stacey Barnier
ES0200	Strategic Communication	University Advancement	Stacey Barnier
ES0400	Alumni Relations & Annual Gvng	University Advancement	Stacey Barnier
ES0500	University Development	University Advancement	Stacey Barnier
ES0700	Advancement Services	University Advancement	Stacey Barnier
FS0100	ITS-Vice President Office	Information Technology Service	Rebecca Christopher
FS0101	ITS-Information Security	Information Technology Service	Rebecca Christopher
FS0300	ITS-CreativeMediaServicesAdmin	Information Technology Service	Rebecca Christopher
FS0310	ITS-Creative Media Services	Information Technology Service	Rebecca Christopher
FS0401	ITS-AdministrativeComputingSys	Information Technology Service	Rebecca Christopher
FS0402	ITS-Business Intelligence	Information Technology Service	Rebecca Christopher
FS0405	ITS-Enterprise and Cloud Svcs	Information Technology Service	Rebecca Christopher
FS0410	ITS-Telecommunications	Information Technology Service	Rebecca Christopher
FS0415	ITS-AcadTechnologies&Innovatn	Information Technology Service	Rebecca Christopher

IRP Approvals

- Your designated Human Resources Manager will need to review the IRP before forwarding it to the Provost/Vice President.
- For IRPs, the approval hierarchy should be as follows:
 1. Dean/AVP/Director (approves the process of HR reviewing the IRP request)
 2. Human Resources (approval means the recommendation is complete)
 3. Provost/Vice President (approval means in agreement with HR's recommendation)
 4. Vice President's Cabinet (VPC - approval means in agreement with HR's recommendation)
 5. Human Resources (approval means to process the outcome of the IRP request)

Attachments

- Drag any file attachments to the third requisition form page.
 - All positions require a [Position Description](#) be attached to the requisition.
 - For Recruitments, a [Position Description](#) and a [job posting](#) must be attached.
 - For reclassifications, complete the forms found in our [forms](#) section and attach.
 - For In-Range Progressions, attach the In-Range Progression [form](#) found in our forms section and attach.



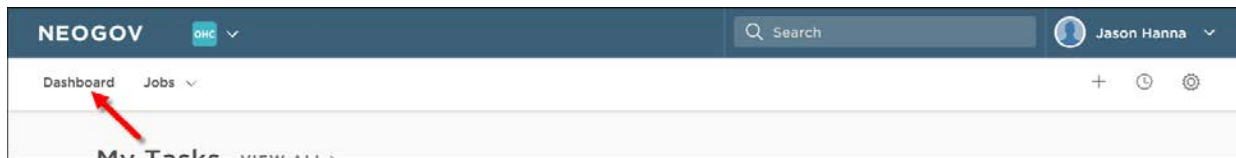
Attachments (Part 2)

- If you're not quite ready to submit the requisition, click Save & Close. The requisition will display on your dashboard page in the My Requisitions section as a draft.
- Click Save & Submit to release to approvers.

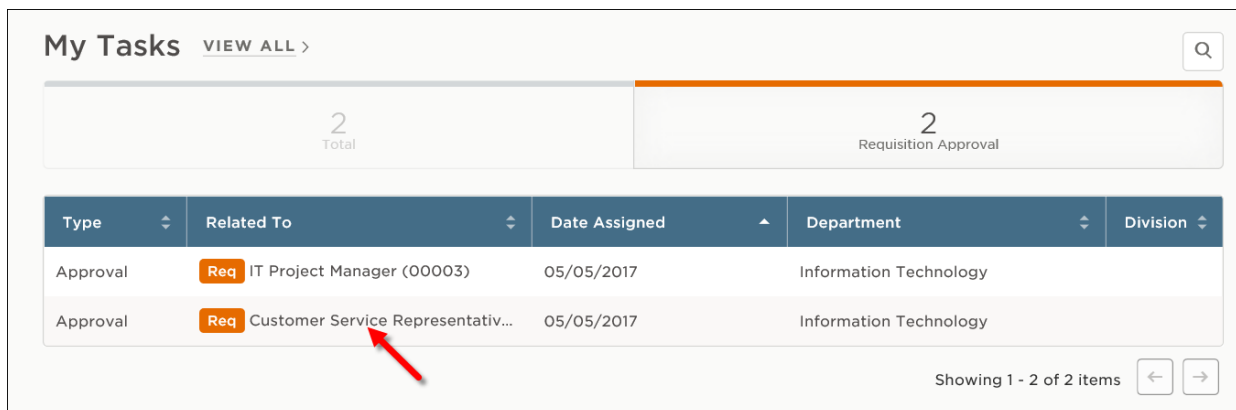
Approving & Authorizing Requisitions

Steps to Approve a Requisition

- If you're not already viewing your dashboard page, click Dashboard from the upper left.



- From the My Tasks section, click the requisition pending your review.



Steps to Approve a Requisition (Part 2)

- Click Approve, type any comments and click Submit.

The screenshot displays the 'Requisition Approval' interface for a 'Customer Service Representative (00005)'. At the top, there is a 'Cancel' button. Below the header, there are three buttons: 'Approve' (with a checkmark icon), 'Deny' (with an 'X' icon), and 'Hold' (with a pause icon). To the right of these is a large green 'Submit' button. A 'Comment (Optional)' section contains a text area with the text 'I approve this requisition. Thank you!'. Below the comment area is the 'Requisition Details' section, which is a table with the following information:

Requisition Details	
Requisition Number	00005
Department	Information Technology
Title	Customer Service Representative
Division	N/A

To the right of the details is the 'APPROVAL TIMELINE' section, which shows two steps:

- 1 Pending...
Budget
Richard Gonzales , +1 more
- 2 Pending...
HR
Simon Davies , +1 more

Steps to Approve a Requisition (Part 3)

- Approvers have the option of denying or placing a requisition on hold. If denied, the requisition record can be sent back to any one of the previous approval groups, or all the way back to the creator. Depending on the circumstances of the denial (e.g., additional justification), the requisition approval process can be restarted.

The screenshot displays a web interface for "Requisition Approval" for an "IT Project Manager (00003)". At the top right is a "Cancel" button. Below the header are four action buttons: "Approve" (green checkmark), "Deny" (red X), "Hold" (grey pause), and "Submit" (green). Under "Approve" is a "Send Back to Step" dropdown menu currently showing "Originator - Hanna Jason". To the right is a "Comment (Optional)" text area containing the text: "The County Administrator's Office requires a new position justification report (i.e., not a replacement of staff). Thank you in advance for providing this report." Below the main form are two sections: "Requisition Details" with fields for "Requisition Number" and "Department", and "APPROVAL TIMELINE" showing a green checkmark for "05/05/2017 by Cheryl Ward" and a "Budget" section with "Richard Gonzalez" and "+1 more".

Steps to Approve a Requisition (Part 4)

- You may review details of the requisition by clicking on the job title. Select the **Approve/Deny** link to the right of the requisition you are working on. Actions you may take are “Approve,” “Deny,” “On Hold/Pending” and “Cancel.”
 - If you **“Approve”** the requisition, it will go to the next approver or human resources, depending on how the original approval chain was set up.
 - If placed **“On Hold/Pending,”** the req creator will see the status change to “On Hold.” He/she may go in and edit the requisition, after which you can approve as appropriate.
 - If **Cancelled**, the requisition status will change accordingly. The req is moved to “Closed Requisitions.”
 - If **Denied**, the requisition will be returned as indicated in the “Return To” field below. The requisition will no longer display on your “My Requisition Approvals” screen, but you may click on “My Requisitions” >> “Show All Reqs in My Dept” >> “Show Approval Details” to see denial activity. Once denied, the requisition creator may edit the requisition and return it to the approver, who will have another opportunity to Approve/Deny.

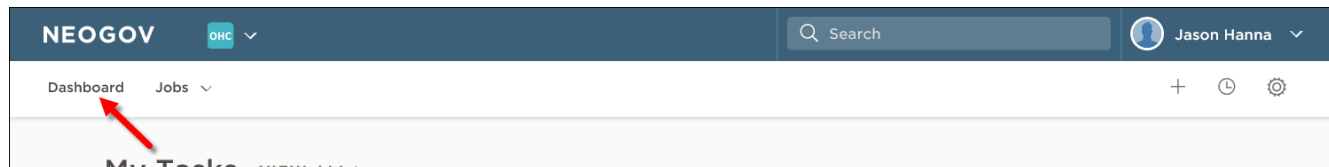
OHC Menu

My Tasks

My Requisitions

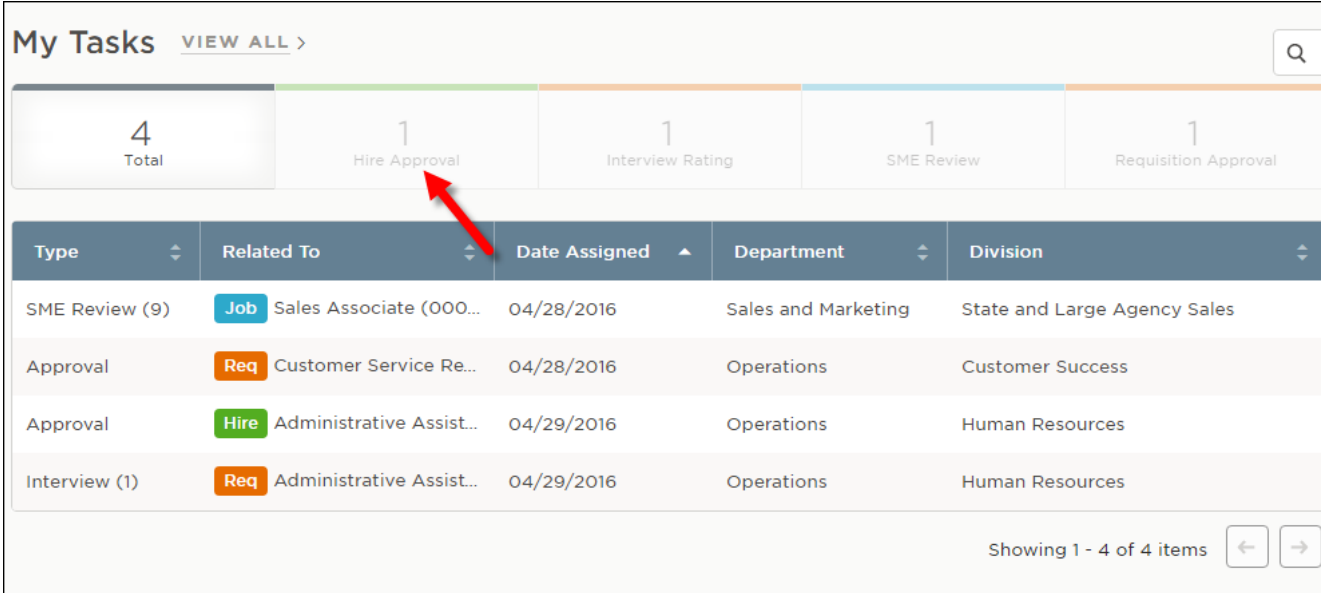
OHC Menu

- Whenever you need to return back to the dashboard, click Dashboard, from the upper left.



OHC Menus – My Tasks

- In the My Tasks section, you can have two different types of tasks pending your review:
 - Requisition Approval
 - Committee Member Review (SME Review)
- The default view displays all tasks pending your review. Click one of the color-coded tabs to view a specific task type.



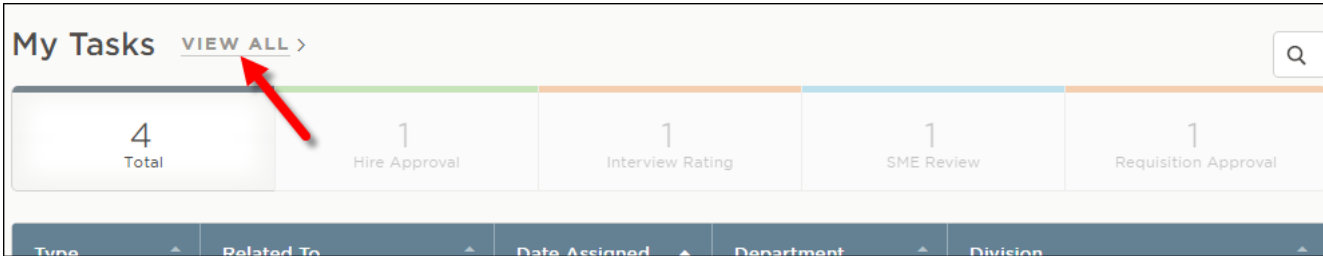
The screenshot displays the 'My Tasks' interface. At the top, there is a search bar and a 'VIEW ALL >' link. Below this is a navigation bar with five tabs: '4 Total', '1 Hire Approval', '1 Interview Rating', '1 SME Review', and '1 Requisition Approval'. A red arrow points to the '1 Hire Approval' tab. Below the navigation bar is a table with the following columns: Type, Related To, Date Assigned, Department, and Division. The table contains four rows of task data.

Type	Related To	Date Assigned	Department	Division
SME Review (9)	Job Sales Associate (000...	04/28/2016	Sales and Marketing	State and Large Agency Sales
Approval	Req Customer Service Re...	04/28/2016	Operations	Customer Success
Approval	Hire Administrative Assist...	04/29/2016	Operations	Human Resources
Interview (1)	Req Administrative Assist...	04/29/2016	Operations	Human Resources

Showing 1 - 4 of 4 items

OHC Menu

- To view all tasks, including completed ones, click VIEW ALL.

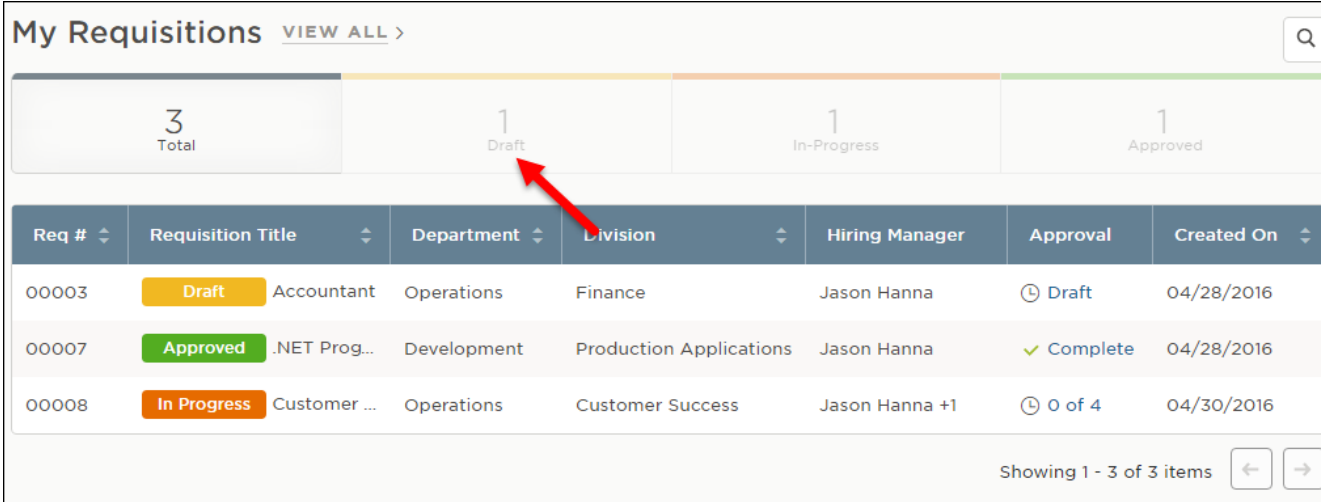


The screenshot displays a 'My Tasks' dashboard. At the top left, the text 'My Tasks' is followed by a link 'VIEW ALL >' which is highlighted with a red arrow. To the right of this link is a search icon. Below the header, there are five summary cards: '4 Total', '1 Hire Approval', '1 Interview Rating', '1 SME Review', and '1 Requisition Approval'. At the bottom, a table header is visible with columns: 'Type', 'Related To', 'Date Assigned', 'Department', and 'Division'.

Type	Related To	Date Assigned	Department	Division
4 Total				
1 Hire Approval				
1 Interview Rating				
1 SME Review				
1 Requisition Approval				

OHC Menus – My Requisitions

- In the My Requisitions section, four types of requisitions associated with you will display:
 - Draft – Requisitions you have created and saved, but haven't yet submitted.
 - In-Progress – Requisitions you have submitted and are in progress of being approved.
 - Approved – Requisitions you have submitted and have been approved by all groups.
 - Open – Requisitions you have submitted and have been opened by HR for recruiting.
- The default view displays all draft, in-progress and approved requisitions associated with you. Click one of the color-coded tabs to view a specific requisition type.



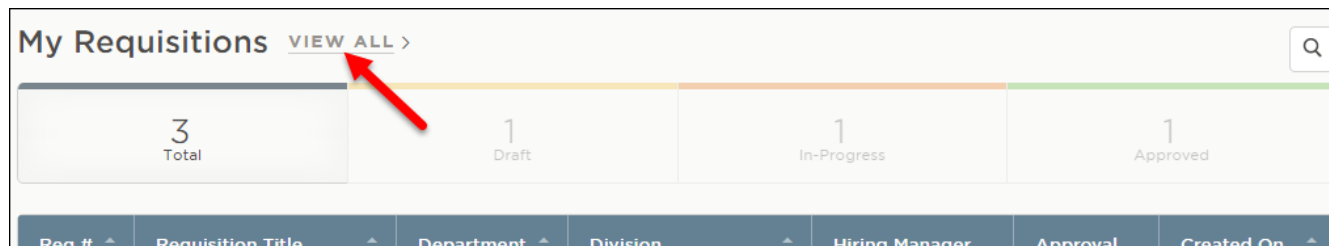
The screenshot shows the 'My Requisitions' interface. At the top, there is a search bar and a 'VIEW ALL >' link. Below this is a summary bar with four tabs: '3 Total', '1 Draft', '1 In-Progress', and '1 Approved'. A red arrow points to the '1 Draft' tab. Below the summary bar is a table with the following columns: 'Req #', 'Requisition Title', 'Department', 'Division', 'Hiring Manager', 'Approval', and 'Created On'. The table contains three rows of data.

Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On
00003	Accountant	Operations	Finance	Jason Hanna	Draft	04/28/2016
00007	.NET Prog...	Development	Production Applications	Jason Hanna	Complete	04/28/2016
00008	Customer ...	Operations	Customer Success	Jason Hanna +1	0 of 4	04/30/2016

Showing 1 - 3 of 3 items

OHC Menus – My Requisitions

- To view all requisitions, including filled and cancelled ones, click VIEW ALL.



The screenshot shows a dashboard titled "My Requisitions" with a search icon in the top right corner. Below the title, there are four summary cards: "3 Total", "1 Draft", "1 In-Progress", and "1 Approved". A red arrow points to the "VIEW ALL >" link located between the title and the summary cards. Below the summary cards is a table with the following columns: Req #, Requisition Title, Department, Division, Hiring Manager, Approval, and Created On.

Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On
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