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HR Requisition Form

This section outlines how to complete the HR Requisition Form in Cherwell Service Management.

Completing the HR Requisition Form is the first step in requesting specific transactions from Classification & Compensation Services.

General Steps:
1. Retrieve and validate all information required for the request
2. Complete the HR Requisition Form in Cherwell Service Management
3. Classification & Compensation Services reviews the request
4. Approval workflow is initiated based upon notes in the comments section
5. Classification & Compensation Services provides final approval
6. Classification & Compensation Services processes the request

Open the HR Requisition Form

- Select HR Requisition Form Tile

- Input the employee ID that the transaction is for and select “OK”
- Review the **Current Information** box for accuracy. This section is read-only.

## Current Information

<table>
<thead>
<tr>
<th><strong>Employee's ID:</strong></th>
<th><strong>First Name:</strong></th>
<th><strong>Last Name:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>0099999999</td>
<td>CSUSB</td>
<td>Employee</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Position Number:</strong></th>
<th><strong>Bargaining Unit:</strong></th>
<th><strong>Working Title:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>00000000</td>
<td>R09</td>
<td>Department Analyst</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Current Classification:</strong></th>
<th><strong>Job Code:</strong></th>
<th><strong>Salary Grade:</strong></th>
<th><strong>Departments:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Analyst/Spclst 12 Mo</td>
<td>1038</td>
<td>2</td>
<td>Human Resources</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Employee Class:</strong></th>
<th><strong>Division:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time</td>
<td>Administration &amp; Finance</td>
</tr>
</tbody>
</table>
Attach a Current/Signed Position Description - *Required*
- Select “Attach File” at the top of the screen

- Attach File (two options)
  **Option 1:** “Drag and Drop” file directly to the File Name window.
**Option 2:** Locate the file on your computer manually.

- Confirm the selection and press “Submit”

- Confirm the document has successfully attached to the request form
Complete the Request Form

- Scroll down and select a **Transaction Reason** from the drop-down menu

![Dropdown menu with Transaction Reasons](image)

**Stipend**

- Is the employee currently receiving a stipend?
  - No – *No additional information required*
  - Yes – *Provide the requisition number of the stipend*

![Stipend input field](image)
Position Number
- New Position Number: Input the position number associated with this request

<table>
<thead>
<tr>
<th>New Position Number (if applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>00009999</td>
</tr>
</tbody>
</table>

Percentage of Salary Increase
- Percentage of Salary Increase: Input the numeric % increase
- Proposed Salary (Monthly or Hourly): Input the base salary rate, after percent change

*Examples:*

- No Increase (with current salary of $4,000/month)
  - Percent of Salary Increase = 0
  - Proposed Salary = 4000

<table>
<thead>
<tr>
<th>Percentage of Salary Increase: *</th>
<th>Proposed Salary (Monthly or Hourly) *</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>4000</td>
</tr>
</tbody>
</table>

- Increase (with current salary of $4,000/month)
  - Percent of Salary Increase = 3
  - Proposed Salary = 4120

<table>
<thead>
<tr>
<th>Percentage of Salary Increase: *</th>
<th>Proposed Salary (Monthly or Hourly) *</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>4120</td>
</tr>
</tbody>
</table>
• Decrease (with current salary of $4,000/month)
  o Percent of Salary Increase = -3
  o Proposed Salary = 3880

<table>
<thead>
<tr>
<th>Percentage of Salary Increase: *</th>
<th>Proposed Salary (Monthly or Hourly) *</th>
</tr>
</thead>
<tbody>
<tr>
<td>-3</td>
<td>3880</td>
</tr>
</tbody>
</table>

Classification
• Select the Classification and Salary Grade combination from the drop-down menu.

  Note: Use all CAPS to search.

How to interpret the selection options (example):

Classification = “ADMINISTRATIVE SUPPORT ASSISTANT -12 MONTH - 2"

  Classification Title = Administrative Support Assistant (ASA)
  Pay Plan = 12-month
  Salary Grade (Range) = 2
Job Code and Salary Grade

- Job Code: This value will populate based upon the classification.
- Salary Grade: This value will populate based upon the classification.

<table>
<thead>
<tr>
<th>Job Code:</th>
<th>Salary Grade:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1038</td>
<td>2</td>
</tr>
</tbody>
</table>

Note: Revise the Job Code and/or Salary Grade by selecting a “Classification” from the drop-down.

Working Title

- Working Title: Input the employee’s current (approved) working title

<table>
<thead>
<tr>
<th>Working Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Analyst</td>
</tr>
</tbody>
</table>

Note: The HR Requisition Form is not used for Working Title updates.

Reports To

- Reports To Coyote ID: Input the Empl ID that this employee reports to (in PeopleSoft Absence Management)
- Reports To Full Name: Populates based upon the Reports To Coyote ID

<table>
<thead>
<tr>
<th>Reports To Coyote ID: *</th>
<th>Reports To Full Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>000000001</td>
<td>Manager Coyote</td>
</tr>
</tbody>
</table>
Department and Department ID

- Department: Select the appropriate department from the drop-down menu.

  *Note*: “Search” feature is case-sensitive.

  **Department: *</b>

  Human Resources

- Dept ID: Input the Department ID

  **Dept ID:**

  DS0600

Effective Date and Expiration Date

- Effective Date: Select the effective date of the transaction.

  **Effective Date:** *

  7/26/2021

- Expiration Date: Select the expiration date of the transaction

  **Expiration Date:** *

  11/30/2021

The following transactions **require** an expiration date:

- Critical Skills Bonus
- Extend Temporary Reassignment
- Temporary Reassignment
- Stipend
The following transactions **do not require** an expiration date:

- Conversion to Permanent
- Permanent Reassignment
- Reinstatement from Temporary Reassignment
- Salary Increase
- Time Base Change (unless temporary)

**Time Base**

- New Time Base: Input the *new* time base (if applicable) in *decimal format.*

  For example:
  - Full Time = 1.0
  - Three-Quarters Time = .75
  - Half-Time = .50

  **New Time Base: (if applicable)**
  
  | 1.0 |

**Type of Appointment**

- Type of Appointment: Select from drop-down menu

  **Type of Appointment: (if applicable)**
  
  Full-Time, Probationary
Justification/Comments

Please include the following information:

- Reason for the change
- Budgetary Information
  - Chartfield String/Funding Source
  - % Distribution if multiple funding sources
- HEERA Manager (name, employee ID) if different than the PeopleSoft Reports To
- Important comments related to the change

<table>
<thead>
<tr>
<th>Justification / Comments: *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason: Temporary additional work assignment for leave coverage.</td>
</tr>
<tr>
<td>Budgetary Information: P0100-GF-601826, Unit 300</td>
</tr>
<tr>
<td>(Dept ID-Fund-Account Nbr-Program, Unit)</td>
</tr>
<tr>
<td>HEERA Manager: Director Coyote</td>
</tr>
<tr>
<td>Comments: More details in attachment.</td>
</tr>
</tbody>
</table>
Input Approvers

- Number of approvers varies by Department and Division
- Input approval workflow:
  - Sandra Bufalini
  - Manager, if required by department.
  - Department Head (Dean/AVP/Director)
  - Vice President or approved designee
  - Cabinet, if needed.

### Approvers

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Sandra Bufalini</td>
</tr>
<tr>
<td>2.</td>
<td>Jeanne Durr</td>
</tr>
<tr>
<td>3.</td>
<td>Douglas Freer</td>
</tr>
<tr>
<td>4.</td>
<td>Katherine Hartley</td>
</tr>
</tbody>
</table>

Review the Request Form

*Important:* Before Submitting the form, please review the request for accuracy. Any changes/revisions will delay the processing of the request.

Submit the Form

- To save and complete later, select "Save as Draft"
- To submit the HR Requisition Form, select "Submit"
What Happens Next?

1. Requestors will receive a confirmation email message
2. Classification & Compensation reviews for completeness/appropriateness
3. Approval requests are sent via email
4. Classification & Compensation Services reviews & completes final approval
5. If approved, Classification & Compensation processes the request
   a. Requestor needs to log in to view status of approval via “My Open HR Requests”