HR Requisition Training

Classification & Compensation Services (CCS)
Classification & Compensation Services Team

- Sandra Bufalini, Manager, Class & Comp Services
- Candace Howard, HR Confidential Analyst
- Jovi Galarza, Class & Comp Analyst
- Serena Aguirre, Class & Comp Coordinator
Learning Outcomes/Objectives

- What’s Happening & When?
- What’s Changing?
- What’s Not Changing?
- What Happens to the NeoGov Transactions?
- Introduction to HR Requisition Form
- How Do I Know What is Happening with the HR Requisitions that I Submit?
- HR Requisition Approval Workflow
- Tips
What’s Happening and When

- NeoEd (NeoGov) Insight & OHC will no longer be used for Class & Comp Employee Transactions.
  - NeoGov Perform will still be utilized for Performance Evaluations by Human Resources.
- Starting Aug 2, 2021 employee transactions will move to the HR Requisition form.
- Campus will no longer have access to NeoGov Insight & OHC effective Aug 10, 2021.
  - If you have documents that you will need immediate access to please remove from NeoGov prior to Aug 2, 2021.
What is Changing?

- **Approval Flow**
  - 1. Department Head(s) 2. VP/Provost 3. Vice President’s Cabinet (VPC)/Cabinet, if needed 4. Budget Office 5. Classification & Compensation Services (CCS)

- **Approval Process**
  - Approvals will be done via email.

- **New Transactions**
  - Reinstatement from Reassignment
    - Approval Flow: 1. Budget Office 2. CCS
  - Permanent Reassignment
    - This action should only be used by Employee Labor Relations unless directed by Class & Comp Services.

- **Transactions Removed**
  - Department Reorg/Planning

- **Requisition Information & Approvers** cannot be changed/edited once approval flow starts.
What is Not Changing?

- The Request Workflow:

1. HR Liaison submits HR Requisition
2. CCS reviews and sends through approval flow
3. HR Requisition goes through approval flow
4. HR Requisition drops for CCS processing
5. HR Requisition is assigned for processing
6. CCS creates STF, Letter & send for HR Signatures
7. CCS enters transaction into PeopleSoft
8. CCS sends STF to Payroll & letter to Staff member
9. CCS Closes HR Requisition request

5-7 business days to forward to approvers, pending no additional information is needed.

Time frame varies by Division and Department.

3-5 business days to process & close, pending no additional information is needed.
What is Not Changing?

- Supporting Documentation Needed:
  - Position Descriptions
    - Signed
    - Current
  - Department Memos
  - Budget Documents

MPP / Staff Position Description

<table>
<thead>
<tr>
<th>HR USE ONLY</th>
<th>Review Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conflict of Interest (COI) Designated: □ Yes □ No</td>
<td></td>
</tr>
<tr>
<td>Mandated Reporter: □ Limited □ General □ N/A</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mandated Reporter Per CANRA</th>
<th>□ YES □ NO</th>
</tr>
</thead>
</table>

The person holding this position is considered a ‘mandated reporter’ under the California Child Abuse and

VI. SIGNATURES:
Signature indicates position description is an accurate and correct statement of duties and responsibilities
assigned to position.

<table>
<thead>
<tr>
<th>Incumbent’s Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appropriate Administrator Signature</td>
<td>Date</td>
</tr>
<tr>
<td>Classification &amp; Compensation Services</td>
<td>Date</td>
</tr>
</tbody>
</table>
What is not Changing?

- The requisition timeline is not changing.
  - ex: An extension of temporary appointment HR Requisition Request should be submitted 60 days before the effective date.
What happens to the NeoGov transactions?

- Anything that is “completed/approved” will be closed.
- Anything that is still “pending” by Aug. 2 will need to be entered as an HR Requisition Request by the department prior to Aug. 10.
- We are requesting a “transaction chill” period in NeoGov starting July 15, 2021.
  - If there is an emergency transaction that needs to be processed please reach out to Classandcompservices@csusb.edu for instructions.
HR Requisition Overview
Step 1:
Go to Class & Comp Services Website and select the HR Requisition Form link box.
Step 2
Enter the Coyote ID for the state-side staff member that the employee transaction is for.
HR Requisition Step 3: Verify that the current information is correct

Current Information

- **Employee’s ID:** 0055559719
- **Position Number:** 00005059
- **Current Classification:** Credit Admin Support 12 Mo
- **Employee Class:** Full Time
- **First Name:** Jovi
- **Bargaining Unit:** C99
- **Job Code:** 1179
- **Division:** Administration and Finance
- **Last Name:** Galarza
- **Working Title:** Classification & Compensation Analyst
- **Salary Grade:** 2
- **Departments:** Human Resources
Step 4: Attach Supporting Documentation

Position Description
Department Memos
Budget Documents
Step 5: Select Transaction Reason
Step 6: Enter remaining Request information
Step 7: Submit Requisition

HR Request ID: 202111309

Submission Confirmation

Are you sure you would like to submit your request?

Once submitted you will need to contact Human Resources to revise the request.
How Do I Know What is Happening with the HR Requisitions that I Submit?
APPROVALS

Approval Flow, Approval Process, Tips
Approval Flow

VPC/Cabinet Approval, Necessary
1. Department Head(s)
2. Vice President/Provost
3. VPC/Cabinet
4. Budget Office
5. Class & Comp Services

VPC/Cabinet Approval, Not Necessary
1. Department Head(s)
2. Vice President/Provost
3. Budget Office
4. Class & Comp Services

The number of approvers varies by department.
Approval Process

- Approvers will receive an email with attachments & approval links
Approval Process

Approver will Click on the appropriate link to approve, approve w/ modification, or deny.
Approval Process

- An email template will open for approvers to make comments and send their approval/modification/denial.
TIPS

Requestors

- CCS inputs & sends approvers, but if you want to ensure all approvers are included then entering the names in approval order in comments will be helpful.

- To add/remove permissions for an individual to enter HR Requisition Request an email from the division VP granting access must be sent to classandcompservices@csusb.edu and HR Requisition training must be completed.

Approvers

- Create a folder and rule in Outlook to automatically filter emails from Human Resources Requests.

- Approvers cannot be changed without clearing and restarting the approval flow.
  - If an approver goes on vacation please have the division VP notify CCS via email at classandcompservices@csusb.edu with the temporary designee name and effective dates.
Thank You!

- Email: Classandcompservices@csusb.edu
- Class & Comp Services Website: https://www.csusb.edu/human-resources/classification-compensation-services

Other Classification & Compensation Services Requested via Cherwell: In-Range Progression Requests, Classification Reviews, and Independent Contractor Requests