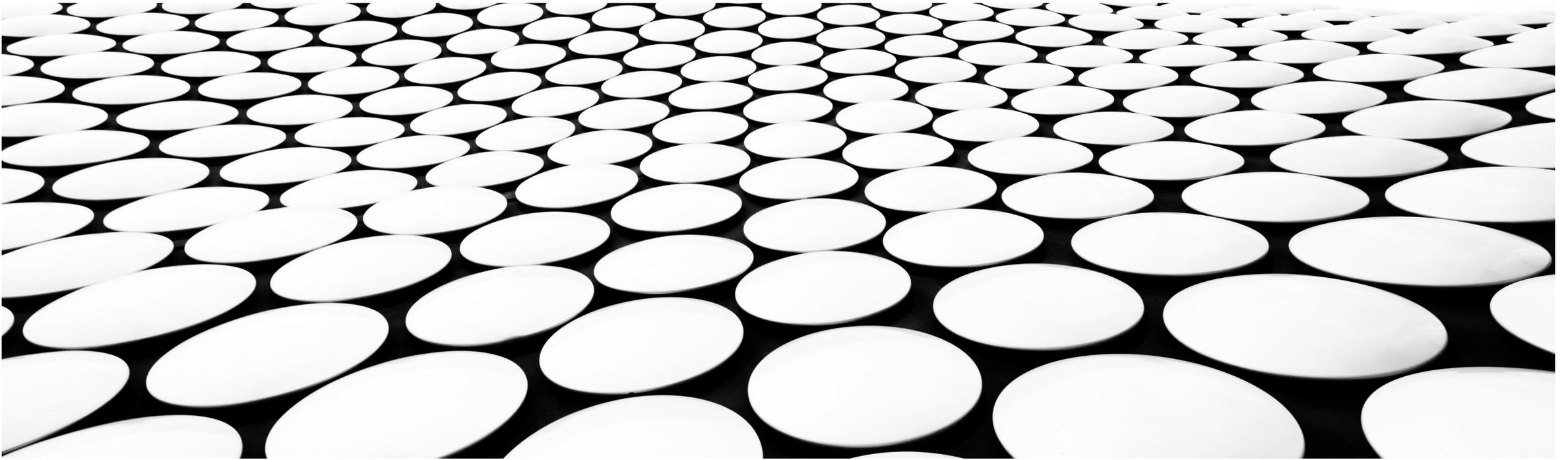


# HR Requisition Training

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

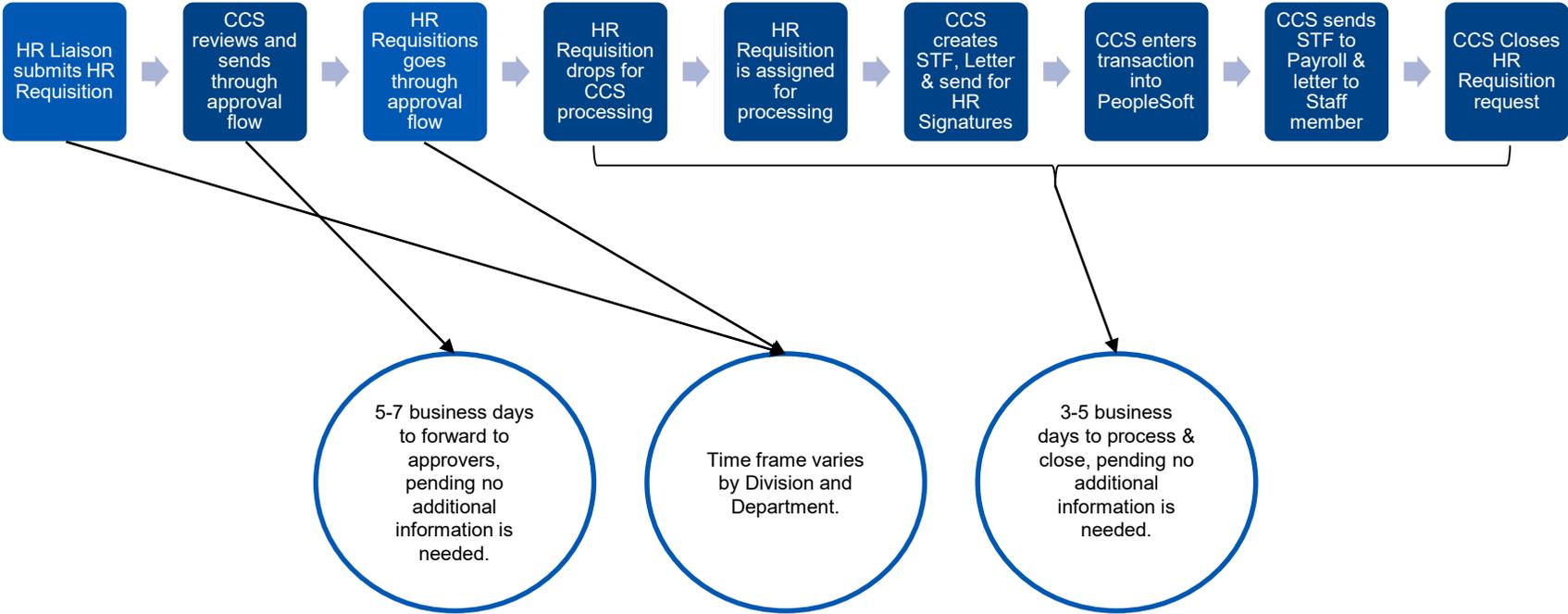
- NeoEd (NeoGov) Insight & OHC will no longer be used for Class & Comp Employee Transactions.
  - NeoGov Perform will still be utilized for Performance Evaluations by Human Resources.
- Starting Aug 2, 2021 employee transactions will move to the HR Requisition form.
- Campus will no longer have access 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:



# What is Not Changing?

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



**Human Resources**  
 5500 University Parkway, Sierra Hall 110  
 San Bernardino, CA 92704  
 (909) 537-5138 / FAX (909) 537-7019

## MPP / Staff Position Description

HR USE ONLY	
Conflict of Interest (COI) Designated: <input type="checkbox"/> Yes <input type="checkbox"/> No Mandated Reporter: <input type="checkbox"/> Limited <input type="checkbox"/> General <input type="checkbox"/> N/A	<b>Review Date:</b>

**Mandated Reporter Per CANRA**  YES  NO

The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act.

### VI. SIGNATURES:

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

Incumbent's Signature		Date
Appropriate Administrator Signature		Date
Classification & Compensation Services		Date

▼ When should departments submit a transaction requisition?

### Requisition Timeline

#### 30 Days

- Stipends
- Critical Skills Bonus
- Salary Increases
- Reinstatement from Temporary Reassignment

#### 45 Days

- Time Base Change
- Position Descriptions for Recruitments\*
- Reassignments
- Concurrent Appointments

#### 60 Days

- Extension of Temporary Appointments\*\*
- Extension of Temporary Reassignments
- Extension of Special Consultants
- Unpaid Leave

#### 90 Days

- Department Reorganization
- Conversion to Permanent

\* For Emergency Hires, Special Consultant Hires, & Recruitments contact Talent Acquisition at [TalentAcquisition@csusb.edu](mailto:TalentAcquisition@csusb.edu).

\*\* Please notify Talent Acquisition ([TalentAcquisition@csusb.edu](mailto:TalentAcquisition@csusb.edu)) if Temporary Appointment is ending as scheduled as soon as possible.

## 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](mailto:Classandcompservices@csusb.edu) for instructions.

# HR Requisition Overview

## Step 1:

Go to Class & Comp Services Website and select the HR Requisition Form link box.

 Position Description	 IRP Information	 Reclassification
 Stipend Information	 Temporary Reassignments	 Additional Employment and Special Consultants
 Independent Contractor Information	 My HR Requests Portal	<b>HR Requisition Form</b>



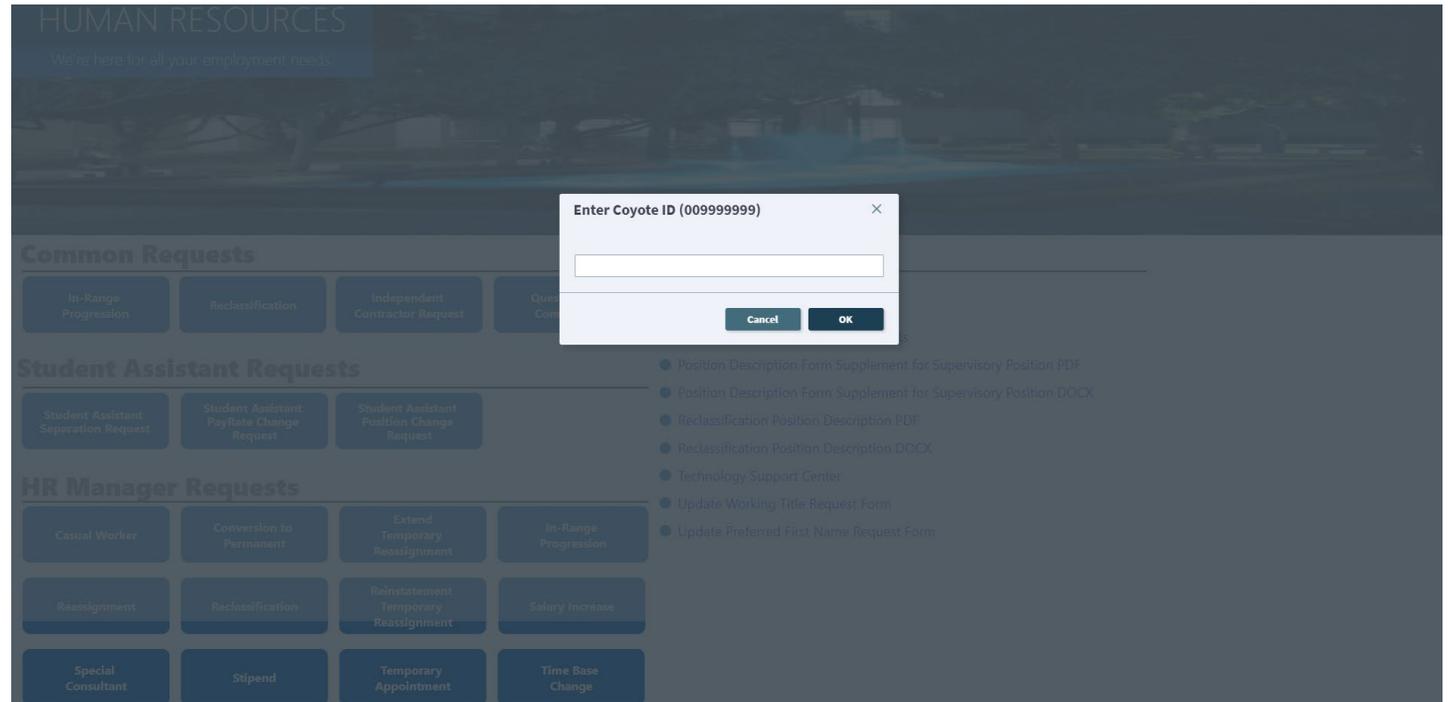
Login

Employment

Campus Services

## 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

Home My HR Request Portal Logout

Save Cancel Refresh Delete Attach (0) Record 1 of 1 Current Record List

Attach File Remove File Save as Draft Submit HR Request ID: 202111262

CALIFORNIA STATE UNIVERSITY  
SAN BERNARDINO

### HR Requisition Form

Required fields are indicated with an \*

#### Current Information

<b>Employee's ID:</b> 005559719	<b>First Name:</b> Jovi	<b>Last Name:</b> Galarza
<b>Position Number:</b> 00005059	<b>Bargaining Unit:</b> C99	<b>Working Title:</b> Classification & Compensation Analy
<b>Current Classification:</b> Cnfdntl Admin Support 12 Mo	<b>Job Code:</b> 1176	<b>Salary Grade:</b> 2
<b>Employee Class:</b> Full Time	<b>Division:</b> Administration and Finance	<b>Departments:</b> Human Resources

#### Requisition Information

Instructions: This form should be completed for all new and extensions of Reassignments. If the requested information below is the same as the current information please type "same as current information" in the box.

**Transaction Reason: \***

Select Transaction Type

### Current Information

<b>Employee's ID:</b> 005559719	<b>First Name:</b> Jovi	<b>Last Name:</b> Galarza
<b>Position Number:</b> 00005059	<b>Bargaining Unit:</b> C99	<b>Working Title:</b> Classification & Compensation Analy
<b>Current Classification:</b> Cnfdntl Admin Support 12 Mo	<b>Job Code:</b> 1176	<b>Salary Grade:</b> 2
<b>Employee Class:</b> Full Time	<b>Division:</b> Administration and Finance	<b>Departments:</b> Human Resources

# Step 4: Attach Supporting Documentation

Position Description

Department Memos

Budget Documents

Attach File    Save as Draft    Submit

Remove File

DOCX    TEST Position Description.docx  
24.17 KB

Cancel    Submit

# Step 5: Select Transaction Reason

The screenshot shows the HR Request Portal interface. At the top, there are navigation buttons: 'Attach File', 'Remove File', 'Save as Draft', and 'Submit'. The HR Request ID is 202111262. Below this, there are fields for 'Employee Class' (Full Time), 'Division' (Administration and Finance), and 'Departments' (Human Resources). The 'Requisition Information' section contains a dropdown menu for 'Transaction Reason: \*' which is currently open, showing options: 'Select Transaction Type -', 'Temporary Reassignment', 'Permanent Reassignment', 'Reinstatement from Temporary Reassignment', 'Salary Increase', 'Stipend', and 'Time Base Change'. To the right of the dropdown is a field for 'Proposed Salary (Monthly or Hourly) \*'.

This is a close-up of the 'Transaction Reason: \*' dropdown menu. The menu is open, showing the following options: 'Select Transaction Type -', 'Conversion to Permanent', 'Critical Skills Bonus', 'Department Reorganization Request/Planning', 'Extend Temporary Appointment', 'Extension of Reassignment', and 'Temporary Reassignment'. A mouse cursor is visible over the 'Conversion to Permanent' option.

# Step 6: Enter remaining Request information

Home My HR Request Portal Logout

Save Cancel Refresh Delete Attach (0) Record 1 of 1 Current Record List Grid

Attach File Remove File Save as Draft Submit HR Request ID: 202111262

Instructions: This form should be completed for all new and extensions of reassignments. If the requested information below is the same as the current information please type "same as current information" in the box.

**Transaction Reason: \***  
- Select Transaction Type -

**Is this employee currently receiving a stipend?: \***  
-

**New Position Number (if applicable)**  
-

**Percentage of Salary Increase: \***  
-

**Proposed Salary (Monthly or Hourly) \***  
-

**Classification: \***  
- Select Classification -

**Job Code:** - **Salary Grade:** -

**Working Title:** - **Reports To Coyote ID: \*** - **Reports To Full Name:** -

**Department: \***  
- Select Department -

**Dept ID:** -

**Effective Date: \*** (M/d/yyyy) - **Expiration Date: \*** (M/d/yyyy) - **New Time Base: (if applicable)** -

**Type of Appointment: (if applicable)** - **Justification / Comments: \***

Save as Draft Submit

# Step 7: Submit Requisition

 Attach File

 Remove File

Save as Draft

Submit

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?



Home My HR Request Portal Logout

## My HR Requests Portal

Filter Request Type: Any ▾

### My Open HR Requests

- 202111065, HR Requisition Request, 5/19/2021 4:21 PM**  
Customer Display Name: ██████████  
Employee ID: ██████████  
Status: New  
Approvals Status: Completed  
Amount of Approvers: 2  
Final Status: In Progress
- 202110805, HR Requisition Request, 4/14/2021 2:14 PM**  
Customer Display Name: ██████████  
Employee ID: ██████████  
Status: In Progress  
Approvals Status: Completed  
Amount of Approvers: 2  
Final Status: In Progress
- 202110708, HR Requisition Request, 3/24/2021 4:09 PM**  
Customer Display Name: ██████████  
Employee ID: ██████████  
Status: Reopened  
Approvals Status: Completed  
Amount of Approvers: 2  
Final Status: Approved

### My HR Requests Drafts

No records found

### My Closed HR Requests

- 202110566, Independent Contractor, 3/10/2021 4:1**  
Customer Display Name: ██████████  
Employee ID: ██████████  
Status: Closed  
Approvals Status: Completed  
Amount of Approvers: 2  
Final Status: Approved
- 202110577, In-Range Progression, 3/11/2021 4:14**  
Customer Display Name: ██████████  
Employee ID: ██████████  
Status: Withdrawn  
Approvals Status: Unsent  
Amount of Approvers: 4

# 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


**Human Resources Requests**  
 HR Requisition Request Request Review (202111311)

To: [Redacted]



---


**Human Resources BULLETIN**

Dear Cody

Human Resources has provided a recommendation for a Permanent Reassignment request, please approve the request via email.

**Request Information**  
**Employees Name:** Cody  
**Transaction type:** Permanent Reassignment

**Current Employee Information**  
**Name:** Cody Paw  
**ID:** 00009902  
**Position Number:** 00006551  
**Bargaining Unit:** R09  
**Working Title:** HRIS Analyst  
**Classification:** Admin Analyst/Spcist 12 Mo  
**Job Code:** 1038  
**Salary Grade:** 2  
**Division:** Information Technology Service  
**Department:** ITS-AdministrativeComputingSys  
**Manager Name:** Grace King  
**Managers Classification:** Chief Administrative Systems Officer

**HR Recommended Information**  
**Salary % Increase:** 15.00%  
**Salary after Increase:** \$57000.00  
**Classification:** ADMINISTRATIVE ANALYST/SPECIALIST -12 MONTH - 4  
**Effective Date:** 7/6/2021


**Human Resources Requests**  
 HR Requisition Request Request Review (202111311)

To: [Redacted]



---

**HR Recommended Information**  
**Salary % Increase:** 15.00%  
**Salary after Increase:** \$57000.00  
**Classification:** ADMINISTRATIVE ANALYST/SPECIALIST -12 MONTH - 4  
**Effective Date:** 7/6/2021  
**Expiration Date:** 2021-07-31  
**FLSA:** Exempt  
**Appointment Type:** Full-Time, Probationary  
**Time Base:** 1.0  
**Position Number:** 00001111  
**Comment:** Test  
 Please click the appropriate link below,  
[Click to Approve HR Request](#) via email  
[Click to Approve with Modification](#) via email  
[Click to Deny Request](#) via email

Approver's Name	Approver's Status
Alpha Den	Approved
Cody Coyote	Waiting - Sent

Human Resources requests your response to this request within 3-5 business days to ensure timely notification to affected parties is assured.

Once approved, the offer details will automatically continue the workflow route to the next approver.

# Approval Process

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

Reply Reply All Forward IM  
Tue 7/6/2021 2:41 PM  
HR Human Resources Requests  
HR Requisition Request Request Review (202111311)

To

TESTPositionDescription.docx  
25 KB

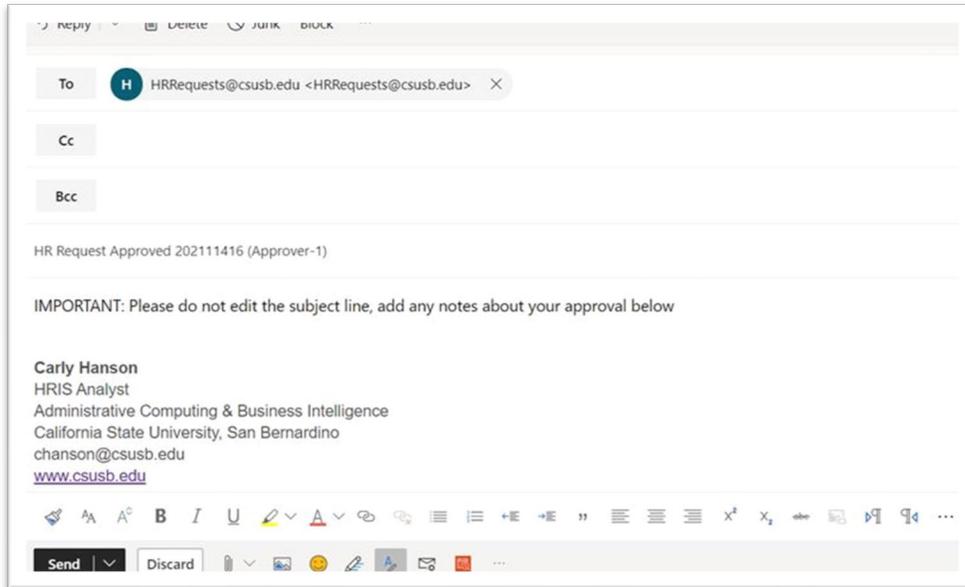
**HR Recommended Information**  
Salary % Increase: 15.00%  
Salary after Increase: \$57000.00  
Classification: ADMINISTRATIVE ANALYST/SPECIALIST -12 MONTH - 4  
Effective Date: 7/6/2021  
Expiration Date: 2021-07-31  
FLSA: Exempt  
Appointment Type: Full-Time, Probationary  
Time Base: 1.0  
Position Number: 00001111  
Comment: Test  
Please click the appropriate link below,  
[Click to Approve HR Request](#) via email  
[Click to Approve with Modification](#) via email  
[Click to Deny Request](#) via email

Approver's Name	Approver's Status
Alpha Den	Approved
Cody Coyote	Waiting - Sent

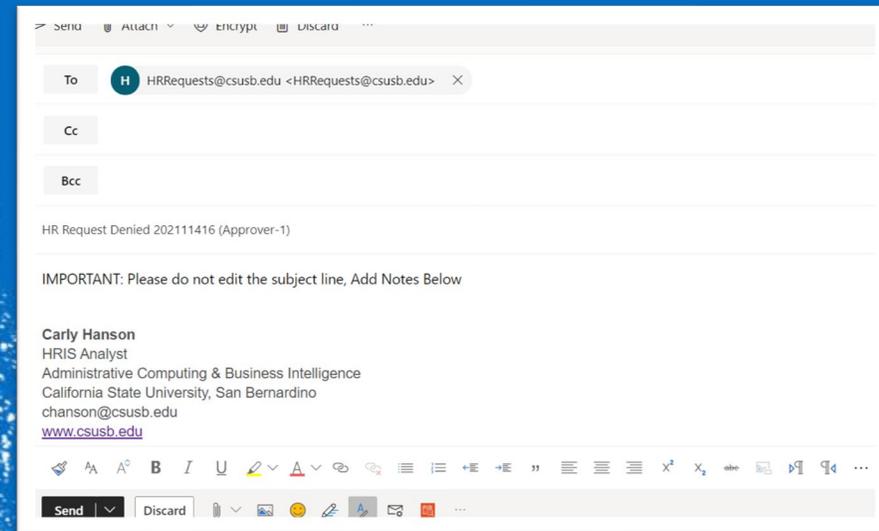
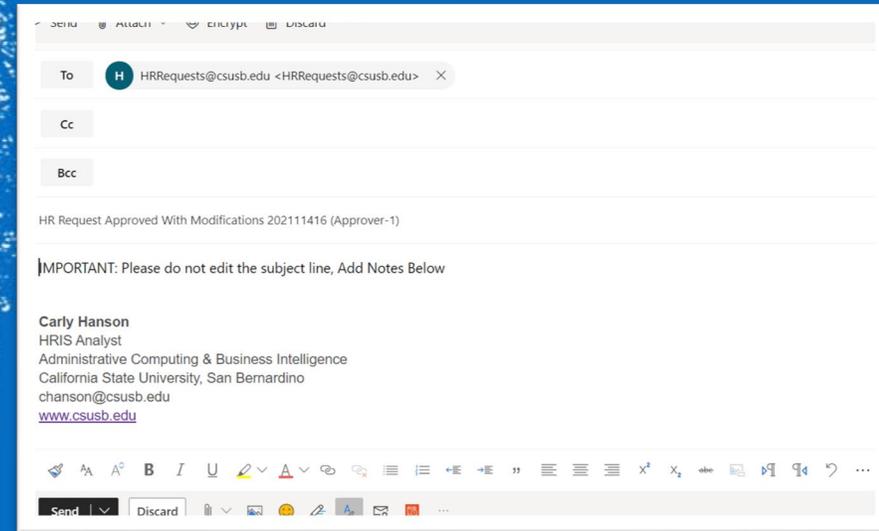
Human Resources requests your response to this request within 3-5 business days to ensure timely notification to affected parties is assured.

Once approved, the offer details will automatically continue the workflow route to the next approver.

# 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](mailto: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](mailto:classandcompservices@csusb.edu) with the temporary designee name and effective dates.

# Thank You!

- Email:
  - [Classandcompservices@csusb.edu](mailto: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