



Human Resources

Hiring Recommendation Form

Administration & Finance

Talent Acquisition – Human Resources

Last Revised: 06/22/21

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Prepare Offer (Hiring Recommendation Form)

This section outlines how to complete the Hiring Recommendation Form in CSU Recruit. This guide replaces the paper "Hiring Recommendation Form."

Creating the Hiring Recommendation Form is the first step in initiating an Offer in CSU Recruit. All state-side staff and MPP offers must originate with the Hiring Recommendation Form.

General Steps:

1. Inform Talent Acquisition Recruiter of the final candidate name via email
2. Talent Acquisition moves successful candidate to "Prep Offer/Hiring Recommendation Form" status
3. HR (Human Resources) Liaison or Hiring Administrator completes the Offer Card
4. HR Liaison or Hiring Administrator submits the Offer Card for approval
5. Offer is approved (or declined for revisions)
6. Talent Acquisition extends **conditional** offer to the Candidate
7. Background Checks, if applicable
8. Talent Acquisition extends **formal** offer to the Candidate via CSU Recruit
9. Candidate electronically accepts **formal** offer in CSU Recruit Applicant Portal

Note: The Offer Card information merges directly to the Offer Letter *and* integrates into PeopleSoft Job Data. For this reason, accuracy is extremely critical.

Log in to CSU Recruit

My Status
Application Status, Admission Transcript Status, and Training Status

Collaborate
Zoom Video Conferencing, Google Drive, Qualtrics Surveys, Yammer and more

Employment Opportunities
Search employment opportunities

Administrative Systems
PeopleSoft CS, PeopleSoft HR, CSYOU, CFS, CFS DW, EMS, and more

Questica Budget
Campus budgeting software for planning, reporting, forecasting and position management.

Handshake
Manage on-campus, part-time, full-time, internship, and volunteer opportunities for students.

CSU Recruit
CSUSB recruiting powered by PageUp. Submit recruitments, view candidate applications, and more

CLSS
Build your semester class schedule using CLSS

Locate the Applicant

A. Locate the job on the dashboard

Dashboard

Current jobs

5 Total 2 All Notifications 1 Approved 1 Offer 1 Pending appr... 1 Posted 1 Testing

5 **A** **Project Analyst**
Requisition Number: 498587

PeopleSoft Reports To Positions: 1 Vacancies: 1

B. Click the Total Applicants icon (to the left of the job name). A list of applicants will appear.

Dashboard

Current jobs

5 Total 2 All Notifications 1 Approved 1 Offer 1 Pending appr... 1 Posted 1 Testing

Project Analyst

Requisition Number: 498587 PeopleSoft Reports To Positions: 1 Vacancies: 1

Note: A callout 'B' points to the 'Total' icon (5), and a box highlights the '5' next to a person icon below it.

C. Locate the applicant.

Project Analyst (498587)

Search Results

Submitted	Status	Applicant Pre#	First name	Last name
Apr 2, 2021	Search Committee Unsuccessful	74232	Cody	Coyote
Feb 23, 2021	Prep Offer/Hiring Recommendation	74090	New	Employee
Apr 2, 2021	Invite for Interview 1	74233	CSUSB	Testing
Apr 2, 2021	Invite for Interview 1	74235	Test	Applicant2
Apr 2, 2021	Interview 1 Declined	74234	Test	Applicant

Note: A callout 'C' points to the first row of the table, and a box highlights the second row.

D. Verify the status is "Prep Offer/Hiring Recommendation."

Submitted	Status	Applicant Pre#	First name	Last name
Apr 2, 2021	Search Committee Unsuccessful	74232	Cody	Coyote
Feb 23, 2021	Prep Offer/Hiring Recommendation	74090	New	Employee

Note: A callout 'D' points to the status 'Prep Offer/Hiring Recommendation' in the second row, which is also boxed.



E. Click the applicant's First or Last Name to open the Applicant Card.


<input checked="" type="checkbox"/> Page	Submitted	Status ▲	Applicant Pre#	First name	Last name	
<input type="checkbox"/>	<input type="checkbox"/>	Apr 2, 2021	Search Committee Unsuccessful	74232	<input type="radio"/> Cody	Coyote
<input type="checkbox"/>	<input type="checkbox"/>	Feb 23, 2021	Prep Offer/Hiring Recommendation	74090	<input checked="" type="radio"/> New	Employee

The Applicant Card will open as a new window.




New Employee ●

[View profile](#) [Add flags](#)

Address	5500 University Parkway San Bernardino, California 92407, United States	Phone	+1 9095375000
E-mail	csusb.hris.test+0987654@gma...	Applicant No	74090
Employment status	 Previous Employee of CSU	Original source	Careers website
e-Zines comms hold	<input type="checkbox"/> No		

[Applications](#) [History](#) [Scheduled emails](#) [CRM](#) [Resume / CV](#)

[Close](#) **This is the Applicant Card**    [<](#) [>](#)

Open the Offer Card

A. Scroll down to view the candidate's application history.

New Employee ●

[View profile](#) [Add flags](#)

Address 5500 University Parkway
San Bernardino, California
92407, United States

A ↓

E-mail csusb.hris.test+0987654@gma...

Employment status 🟡 Previous Employee of CSU

e-Zines No

comms hold

[Applications](#) History Scheduled emails

B. Locate the appropriate job requisition number.

[Applications](#) History Scheduled emails CRM Resume / CV

B

i 498587 - Project Analyst

Date submitted Feb 23, 2021	Applied via Other job boards
Status changed Apr 26, 2021 Prep Offer/Hiring Recommendation Form	Offer No offer
Resume / CV View	Form View

c. Click the "No Offer" hyperlink to open the Offer Card. A new window will appear.

i 498587 - Project Analyst

Date submitted
Feb 23, 2021

Status changed Apr 26, 2021
[Prep Offer/Hiring Recommendation Form](#)

Resume / CV
[View](#)

Applied via
[Other job boards](#)

Offer
C [No offer](#)

Form
[View](#)

Complete the Offer Card

The Offer Card contains eleven sections. Please complete carefully and thoroughly, to ensure accuracy.

Personal Details

This section populates applicant personal information and is read-only.

Offer details

New Employee

1 Personal details

Address: 5500 University Parkway
San Bernardino, California
92407, United States

Phone: 9095375000

E-mail: csusb.hris.test+0987654@gmail.com

Applicant No: 74090

Employment status: Previous Employee of CSU

[View profile](#)

Current or Previous Employee Details



- For current, **active** employees: Search by **CSUSB Email Address**
- For **new** employees (never employed at CSUSB): Leave this section blank.
- For **rehire** employees (inactive): Leave this section blank.

2 Current or previous employee details

i For assistance completing this section, please review the instructions: [Employee Profile Link Instructions Job Aid](#)

PLEASE NOTE:
Once the selection is made and the Offer card is "Saved/Submitted", the selection **cannot be edited** by system users. In the event of an incorrect selection, do not move forward please contact your Campus Configuration Administrator to submit a "High Impact" JIRA ticket, which includes the correct Employee number from your campus' PeopleSoft environment.

Select current active employee only:

Employee:**  

No user selected.

Job Details

- a. Verify all information in this section. If any items require revisions, please contact your recruiter.
- b. Verify time base.

3 Job details

CSU Working Title: **i** Project Analyst.

Position Type: Staff

Campus: San Bernardino

Division: **a** Administration and Finance

College/Program: Administration and Finance Div

Department: Human Resources - DS0600

Time Basis: **b** Full Time

Offer Details

The Offer Details section contains eight sub-sections. Much of the information populates from the Job Card.

- Confirm the Position Number is accurate.

4 Offer details

Approval status: **Pending**

Recruiter: Recruiter Name

Date entered: May 13, 2021, 4:30 pm

Application source: Internet - Other job boards [Edit](#)

Positions:

Position no	Type:	Applicant	Application status
<ul style="list-style-type: none"> • Administrative Analyst/Specialist Position no: SB-11111111 	New	-	-

Offer Details Symbol Key	
Symbol	Definition
*	Required Field
+	Conditionally Required (see notes)
<i>Italics</i>	Optional

POSITION DETAILS

- Job Code/Employee Class*: Verify
- Auxiliary Hire*: No
- Hiring Type*: Verify
- Start Date*: Tentative Start Date
- End Date+: Required for **Temporary** Appointments
- Probation End Date+: Required for **Probationary** Appointments

POSITION DETAILS

Job Code/Employee Class: 🔍 ✎

* Job Code: 1038 ▼

Auxiliary Hire:* * Yes No
Selecting 'Yes' will exclude this new hire from the PeopleSoft integration file.

Hiring Type: * ▼

Start date:* * 📅

End date if applicable: + 📅 ← Required for Temporary Appointments

Probation End Date: + 📅 ← Required for Probationary Appointments

- FTE*: Required
- Hours/Week+: Required for Salaried Appointments
- FLSA*: Verify.

FTE: * ← Time Base Equivalent

Hours Per Week: + ← Required for Salaried

FLSA Status: * ▼

- Union*: Required.
- Union Language: This section is not used.

Union: * ▼

Union Language: →

- Mandated Reporter*: Required
- NCAA*: No
- Sensitive Position*: Required
 - Note: This section should match the "Sensitive Position" field on the Position Description.

Mandated Reporter: *

NCAA: * Yes No

Sensitive Position: *

- Conflict of Interest*: Required
- Concurrent Hire*: Required
- Rehired Annuitant*: Required

Conflict of Interest: *

Concurrent Hire: * Yes No



Rehired Annuitant: * Yes No

BUDGET DETAILS

- Chart field String*: Required
 - If the position is funded from multiple sources, list both and the % of each.
- Pay Plan*: Required

BUDGET DETAILS	
Budget/Chart field/Account string: *	<input type="text" value="601826-SB001-D0600"/>
Pay Plan: *	<input type="text" value="12 Months"/>

- Months Off+: Required for 10/12, 11/12 Pay Plans. Otherwise, leave blank.
- Salary Range*: Verify

Pay Plan Months Off:+	<input type="text"/>	← Required for 10/12, 11/12 Pay Plans
Salary Range/Grade:*	<input type="text" value="1038-NON-EXEMPT-Grade-1"/>	 
	<p>Minimum: \$ 3,288.00 Maximum: \$ 6,347.00 Pay Frequency:</p>	

- Anticipated Hiring Range*: Verify
 - Note: Talent Acquisition refers to this field during salary negotiations.
- Max Budgeted Amount: *Optional*

Anticipated Hiring Range: *	<input type="text" value="3,288-3,400 per month"/>
Maximum budgeted amount:	<input type="text" value="3,400 Maximum Offer"/>

SALARY AND COMPENSATION

- Base Pay Rate*: Required
 - Note: This is the Full-Time Equivalent base rate of pay (for part-time)
- Unit Basis*: Required
- Monthly Pay+: Required for Salaried Appointments
 - Note: This is the **actual gross** monthly pay.
- *Annual Salary: Optional*

SALARY and COMPENSATION	
Base Pay Rate:*	* <input type="text" value="3288.00"/> ← Salary "based on" rate, regardless of time base
Unit basis:*	* <input type="text" value="Monthly"/> ▼
Monthly Pay:	+ <input type="text"/> ← Required for salaried appointments. "Actual" monthly salary, per time base.
Annual salary:	<input type="text"/>

- *Relocation: Complete if applicable.*
- *Sign on Bonus: Complete if applicable.*

Relocation:	<input type="text"/>
Sign on bonus:	<input type="text"/>

- *Supplementary Compensation: Complete if applicable.*
- *Salary Notes: Optional*

Other supplementary compensation:	<input type="text"/>
Salary notes:	<input type="text"/>

BENEFITS ELIGIBILITY

- Benefits Eligible*: Required
- Eligibility Details+: Complete, if known. Otherwise, leave blank.

Benefits Eligibility

Benefits eligibility is determined based on the appointment. To confirm benefits eligibility please see your benefits office for further details.

Benefits Eligible?: * Yes No

Benefit Eligibility
Details:

Full Benefits ← Complete, if known. ▾

- Auxiliary Benefits: Leave this section blank.

Auxiliary Benefits: → **Not Used**

FACULTY DETAILS – Do not complete this section.

FACULTY / R03 DETAILS

This Section is Not Used

EDUCATION AND LICENSE VERIFICATION

This section uses a series of system-wide, numeric codes to indicate highest level of education and license/certifications, outlined in the [PS 9.0 Major, Institute and License/Certification Codes spreadsheet \(A\)](#).

Use the spreadsheet to complete specific fields below.

EDUCATION and LICENSE VERIFICATION

Please note that you must use the appropriate reference workbook to enter the correct Major, Institute and/or 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.


PeopleSoft 9.0 Campuses, use the following:

- A** • [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](#)

- Highest Level of **completed** Education*: Required
- Degree Type*: Required
- Terminal Degree*: Required
- Date Completed*: Required
- Major Code*: Required (Use [PS Code Spreadsheet](#))
- Institute Code*: Required (Use [PS Code Spreadsheet](#))

Highest Level of Education:	*	<input type="text" value="Bachelor's Level Degree"/>
Degree Type:	*	<input type="text" value="Bachelor of Business Admin"/>
Terminal Degree for Discipline:	*	<input type="radio"/> Yes <input checked="" type="radio"/> No
Date of Completion:	*	<input type="text" value="Jun 30, 2007"/> 
Major Code:	*	<input type="text" value="530"/>
Institute Code:	*	<input type="text" value="001142"/>


← Identify codes by using spreadsheet

Complete all License/Certification fields **if job requires** a license or certificate+. Otherwise, leave blank.

- Refer to [Jobs Requiring a License](#) for details.

License/Certification Code: + ← Use code spreadsheet

License/Certification Number: +

License/Certification Expiry Date: + 

EMPLOYMENT CHECKS

For additional information, please refer to the [CSUSB Background Policy](#)

- Background Check*: Select Yes or No.
- Background Check Code: Leave as is. This section is not used.
- Pre-placement Physical*: Select Yes or No.

EMPLOYMENT CHECKS

PRE-EMPLOYMENT CHECKS

Background Check: * Yes No

Background Check Codes: ←

Pre-placement physical: * Yes No

ONBOARDING

- Offer Type*: Required
- Pay Group*: Required
- Offer Approval Type*: Choose **"SB"**

ONBOARDING	
OfferType:*	* <input type="text" value="Rehire"/>
Pay Group:*	* <input type="text" value="Master Payroll (MST)"/>
Offer Approval Type:*	* <input type="text" value="SB"/>

- Onboarding Form+: Required for New Hire or **Inactive** Rehire. Otherwise, leave blank.

Onboarding Form: +	<input type="text" value="Base New Employee Data Form_V2020"/>
--------------------	--

- Onboarding Portal*: Choose **"SB-Portal (2.0)"**
- Onboarding Workflow+: Required for New Hire or **Inactive** Rehire. Otherwise, "None"

Onboarding Portal: *	<input type="text" value="SB - Portal (2.0)"/>
Onboarding workflow: +	<input type="text" value="SB-HR-Staff"/>

List of Most Common Onboarding Combinations (for reference)

For current (active) CSUSB employees, choose:

- Offer Type = Promotion, Reassignment, etc.
- Onboarding Form = None
- Onboarding Portal = SB-Portal (2.0)
- Onboarding Workflow = None



For new hires, choose:



- Offer Type = Hire
- Onboarding Form = Base New Employee Data Form_V2020
- Onboarding Portal = SB-Portal (2.0)
- Onboarding Workflow = SB-HR_Staff or SB-HR_MPP



For former (inactive) CSUSB employees, choose:



- Offer Type = Rehire
- Onboarding Form = Base New Employee Data Form_V2020
- Onboarding Portal = SB-Portal (2.0)
- Onboarding Workflow = SB-HR_Staff or MPP SB-HR_MPP

- Reports To*: Required
- Onboarding Delegate+: Required if someone *other than* the “Reports To” will oversee the employee’s onboarding.

Reports To:* *  

Onboarding Delegate 1: +  

Onboarding Delegate 2:  

Onboarding Delegate 3:  


OFFER PROGRESS - Do not complete this section.

OFFER PROGRESS


This section is completed by Human Resources Only

The following fields will require manual updates

Verbal offer extended: Yes No


Date verbal offer extended: 

Verbal offer accepted: Yes No


Date verbal offer accepted: 

The following fields will be automatically updated by the system

Offer accepted: Yes No

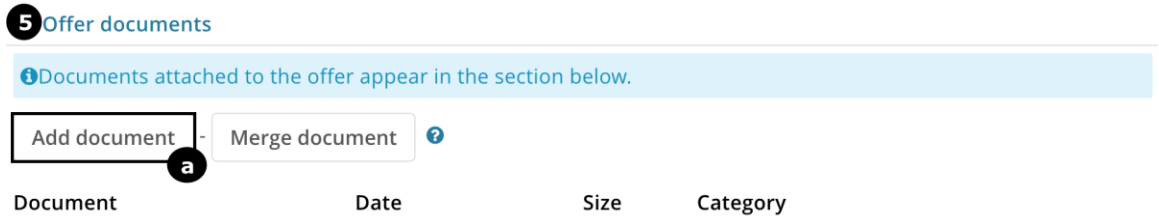
Date offer accepted: 

Offer declined: Yes No

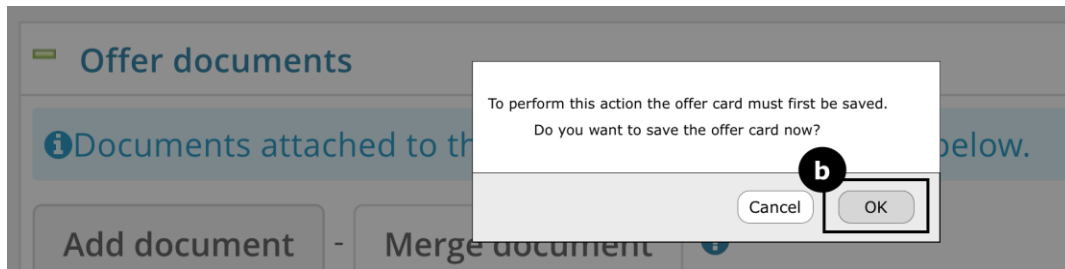
Date offer declined: 

Offer Documents

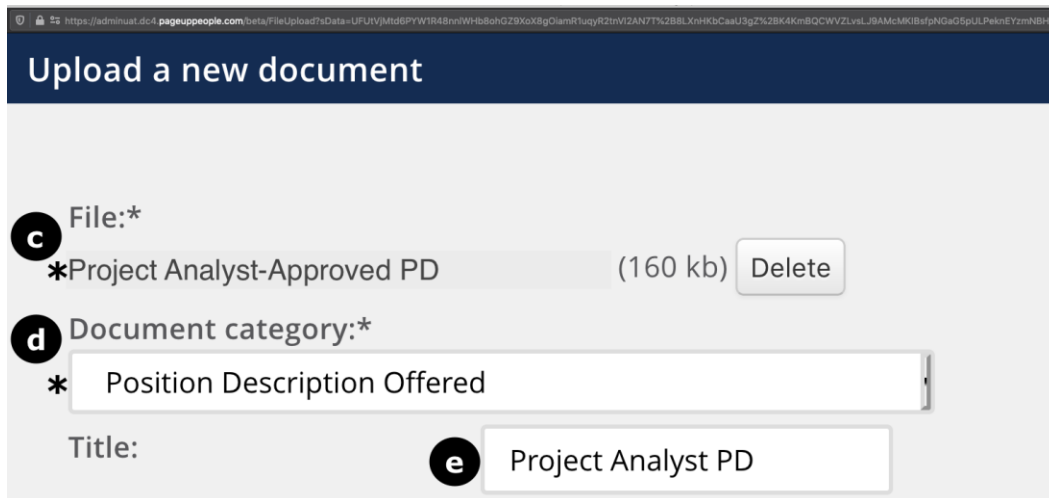
- a. Select "Add Document"



- b. Click "OK" to save. A new screen will appear.



- c. File*: Upload a copy of the CSU Recruit (approved) Position Description
- d. Document Category*: Select **Position Description Offered**
- e. *Document Title: Optional*



- f. Click "Save and close"
- g. Verify document uploaded to Offer Card.

f

i Documents attached to the offer appear in the section below.

-

?

Document	Date	Size
g Project Analyst PD	May 18, 2021	160Kb

Application Documents – No action required.

6 Application documents

Documents uploaded by the applicant are displayed in blue.
 Documents belonging to a different application are marked with an asterisk (*).

Title ▼	No Action Needed	Size	Category
New Employee_Cover Letter.pdf		34Kb	Cover letter
New Employee_Resume.pdf		34Kb	Resume

Page 1 of 1

Offer Check – Do not complete this section.

7 Offer Check **SECTION NOT USED AT THIS TIME**

Add a check group:



Add a check type:

Approval Process – Campus

- Hiring Manager*: Required
 - Note: This field will default to the user who completes the offer card. Always change this to the Hiring Manager (if different).

8 Approval process - Campus

Hiring Manager:*

* Hiring Manager Name  

Email address: HManager@csusb.edu

A. Approval Process*: Choose the appropriate workflow per hire type

- SB-HR-MPP Offer
- SB-HR-MPP w/AVP
- SB-HR-Staff Offer



Approval process - Campus:*

A

- ✓None
- SB-FAD-T/TT/Visting Faculty Offer Approval
- SB-HR-MPP Offer
- SB-FAD-Athletics Offer Approval Process
- SB-HR-MPP Offer (with AVP)
- SB-HR-Staff Offer
- SB- FAD- Offer Approval- Override



- Approval Workflow Names*: Required (complete blank boxes)
 - Note: the names listed within the approval workflow receive the "Approval Requested" notification email when it is their turn to approve.

1. Hiring Manager: *

Hiring Manager Name  



Email address: HManager@csusb.edu

2. Recruiter: *

TA Recruiter Name  



Email address: TA_Recruiter@csusb.edu

3. Budget: *

CSUSB Budget Department  

Email address: budget@csusb.edu

4. Recruiter: *

TA Recruiter Name  

Email address: TA_Recruiter@csusb.edu

Application Status

- Update Application*: No

9 Application status

Update application status following offer: Yes No *

Provisioning– Do not complete this section.

10 Provisioning **NOT USED AT THIS TIME**

Click the 'add' button below to add a provisioning item

Add

Item	Option
Provisioning address:	<input type="text"/>

Please include the address of where it is to be delivered to and a contact number

Exports– No action required (HR Only).

11 Exports **NO ACTION NEEDED**

Export Title	Exported	Export Date (Eastern Standard Time)
No Exports were found.		

Review the Offer Card

Important: Review the Offer Card for Accuracy

Submit the Offer Card

- To save and complete later, select "Save and close"
- To initiate the Offer Approval Process, select "Submit"

Save and close

Submit

Cancel

What Happens Next?

1. Approvers will be prompted (via email) to review the Offer Card.
2. Once **fully approved**, the assigned Talent Acquisition Recruiter will contact the department with updated information and next steps.
 - a. Note: "Fully Approved" means that campus/department administration have reviewed and "approved" the offer plans. The candidate has **not** received any **conditional offer** communication yet.