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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

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

C. Locate the applicant.

D. Verify the status is “Prep Offer/Hiring Recommendation.”
E. Click the applicant’s First or Last Name to open the Applicant Card.

The Applicant Card will open as a new window.
Open the Offer Card

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

B. Locate the appropriate job requisition number.
c. Click the “No Offer” hyperlink to open the Offer Card. A new window will appear.

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.
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.

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

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td>Required Field</td>
</tr>
<tr>
<td>+</td>
<td>Conditionally Required (see notes)</td>
</tr>
<tr>
<td>Italics</td>
<td>Optional</td>
</tr>
</tbody>
</table>

Offer Details Symbol Key
**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

<table>
<thead>
<tr>
<th>POSITION DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Code/Employee Class</strong>: Admin Analyst/Spclst 12 Mo</td>
</tr>
<tr>
<td><strong>Auxiliary Hire</strong>: Yes/No</td>
</tr>
<tr>
<td><strong>Hiring Type</strong>: Probationary</td>
</tr>
<tr>
<td><strong>Start Date</strong>:</td>
</tr>
<tr>
<td><strong>End Date</strong>: Required for Temporary Appointments</td>
</tr>
<tr>
<td><strong>Probation End Date</strong>: Required for Probationary Appointments</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th><strong>FLSA Status</strong>: Non-Exempt</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th><strong>Union</strong>: California State University Employees Union (CSUEU)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Union Language</strong>: Not used</td>
</tr>
</tbody>
</table>
• Mandated Reporter*: Required
• NCAA*: No
• Sensitive Position*: Required
  o Note: This section should match the “Sensitive Position” field on the Position Description.

Mandated Reporter: ✻
General - The person holding this position is considered a general mandated repor...

NCAA:
� ○ Yes ☐ No

Sensitive Position:
� Requiring heightened scrutiny of individuals holding the position based on potenti...

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

Conflict of Interest: ✻ None

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

<table>
<thead>
<tr>
<th>Chart field/Account string:</th>
<th>601826-SB001-D0600</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Plan:</td>
<td>12 Months</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Anticipated Hiring Range:</th>
<th>3,288-3,400 per month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum budgeted amount:</td>
<td>3,400 Maximum Offer</td>
</tr>
</tbody>
</table>
**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

```
<table>
<thead>
<tr>
<th>SALARY and COMPENSATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Pay Rate: 3288.00</td>
</tr>
<tr>
<td>Unit basis: Monthly</td>
</tr>
<tr>
<td>Monthly Pay:</td>
</tr>
<tr>
<td>Annual salary:</td>
</tr>
</tbody>
</table>
```

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

```
Relocation:

Sign on bonus:
```

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

```
Other supplementary compensation:

Salary notes:
```
**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

- Auxiliary Benefits: Leave this section blank.

- Auxiliary Benefits: Not Used

**FACULTY DETAILS** – Do not complete this section.

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.

<table>
<thead>
<tr>
<th>EDUCATION and LICENSE VERIFICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
<tr>
<td>PeopleSoft 9.0 Campuses, use the following:</td>
</tr>
<tr>
<td>• PS 9.0 Major, Institute and License/Certification codes</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
<tr>
<td>CHRS (PeopleSoft 9.2) Campuses, use the following:</td>
</tr>
<tr>
<td>• CHRS PS 9.2 Major, Institute and License/Certification codes</td>
</tr>
</tbody>
</table>

- 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](#))

<table>
<thead>
<tr>
<th>Highest Level of Education:</th>
<th>Bachelor’s Level Degree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree Type:</td>
<td>Bachelor of Business Admin</td>
</tr>
<tr>
<td>Terminal Degree for Discipline:</td>
<td>Yes  No</td>
</tr>
<tr>
<td>Date of Completion:</td>
<td>Jun 30, 2007</td>
</tr>
<tr>
<td>Major Code:</td>
<td>530</td>
</tr>
<tr>
<td>Institute Code:</td>
<td>001142</td>
</tr>
</tbody>
</table>
Complete all License/Certification fields **if job requires** a license or certificate+. Otherwise, leave blank.

- Refer to **Jobs Requiring a License** for details.

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.
ONBOARDING

- Offer Type*: Required
- Pay Group*: Required
- Offer Approval Type*: Choose “SB”

<table>
<thead>
<tr>
<th>Offer Type*:</th>
<th>Rehire</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Group*:</td>
<td>Master Payroll (MST)</td>
</tr>
<tr>
<td>Offer Approval Type*:</td>
<td>SB</td>
</tr>
</tbody>
</table>

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

Onboarding Form: +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: *SB - Portal (2.0)

Onboarding workflow: +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.

OFFER PROGRESS - Do not complete this section.

Verbal offer extended:
- Yes
- No

Date verbal offer extended:

Verbal offer accepted:
- Yes
- No

Date verbal offer accepted:

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.

<table>
<thead>
<tr>
<th>Document</th>
<th>Date</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Analyst PD</td>
<td>May 18, 2021</td>
<td>160Kb</td>
</tr>
</tbody>
</table>

**Application Documents – No action required.**

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Size</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Employee_Cover Letter.pdf</td>
<td>34Kb</td>
<td>Cover letter</td>
</tr>
<tr>
<td>New Employee_Resume.pdf</td>
<td>34Kb</td>
<td>Resume</td>
</tr>
</tbody>
</table>

**Offer Check – Do not complete this section.**
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).

<table>
<thead>
<tr>
<th>Approval process - Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Manager:*</td>
</tr>
<tr>
<td>Email address: <a href="mailto:HManager@csusb.edu">HManager@csusb.edu</a></td>
</tr>
</tbody>
</table>

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

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

**Note: the names listed within the approval workflow receive the “Approval Requested” notification email when it is their turn to approve.**

<table>
<thead>
<tr>
<th>Approval Workflow Names*</th>
</tr>
</thead>
<tbody>
<tr>
<td>SB-FAD-T/TT/Visting Faculty Offer Approval</td>
</tr>
<tr>
<td>SB-HR-MPP Offer</td>
</tr>
<tr>
<td>SB-FAD-Athletics Offer Approval Process</td>
</tr>
<tr>
<td>SB-HR-MPP Offer (with AVP)</td>
</tr>
<tr>
<td>SB-HR-Staff Offer</td>
</tr>
<tr>
<td>SB-FAD Offer Approval Override</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1. Hiring Manager:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email address: <a href="mailto:HManager@csusb.edu">HManager@csusb.edu</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. Recruiter:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email address: TA <a href="mailto:Recruiter@csusb.edu">Recruiter@csusb.edu</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Budget:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email address: <a href="mailto:budget@csusb.edu">budget@csusb.edu</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4. Recruiter:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email address: TA <a href="mailto:Recruiter@csusb.edu">Recruiter@csusb.edu</a></td>
</tr>
</tbody>
</table>
Application Status

- Update Application*: No

Provisioning – Do not complete this section.

Exports – No action required (HR Only).
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”

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.