

# NEOGOV<sup>TM</sup>

Requisitions 101

Training Guide

# Access NeoGov

- neogov.com
- If you have already set up your password, you will not need to reset it.
- If you need access, your account has not been activated, or you need to reset your password, contact Shawna Holmquist  
[Shawna.Holmquist@csusb.edu](mailto:Shawna.Holmquist@csusb.edu)
- Please check your junk mail for an email directly from NeoGov.com and reset your password within 24 hours.

The email will contain instructions similar to the following:

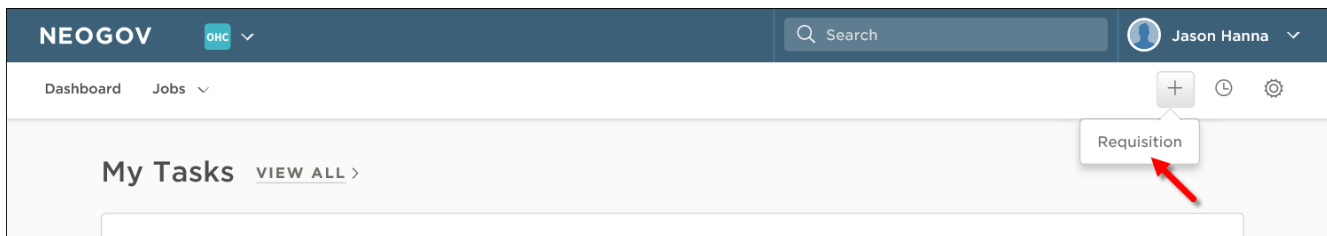
- Passwords will need to meet the following requirements:
- Length of 8 or more characters
- Contain a number
- Contain a special character, for example !, @, #, \$, %, ^, &, \*
- Contain an upper and lowercase letter

# Open a New Requisition

- When a hiring department has an open position, they'll submit a requisition as a request to fill the vacancy.
- Below is the first of two navigation paths to start up the process of creating a requisition.

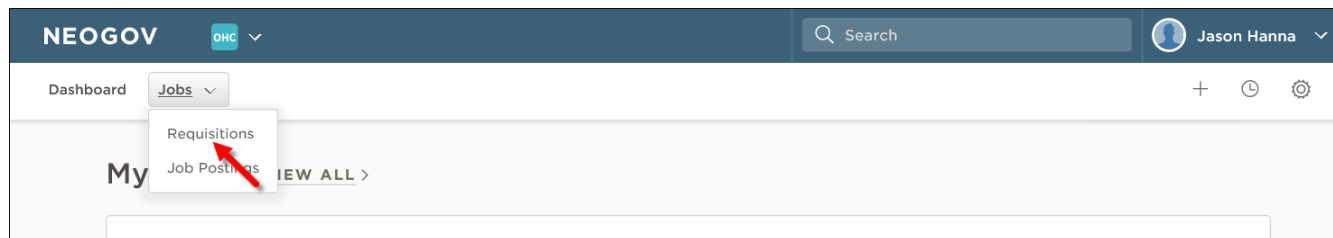
## Navigation Path 1

- On the Add New menu [+], click Requisition. This can be done from any page.

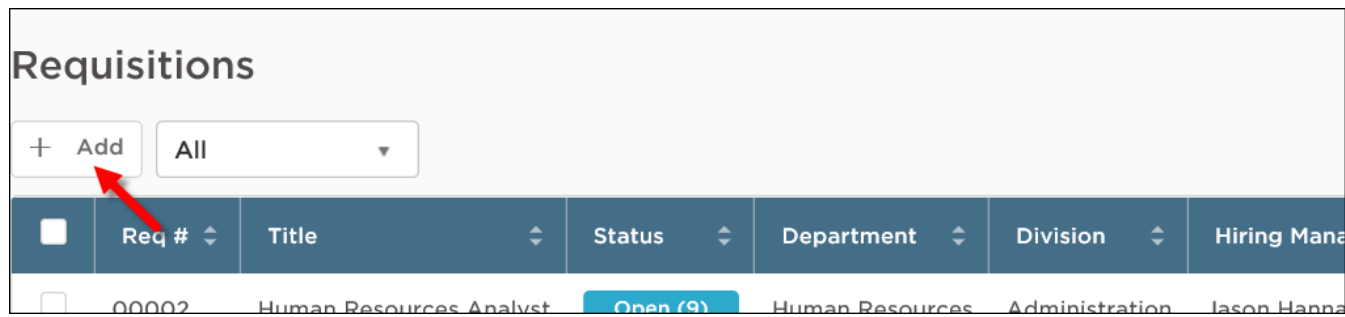


# Open a New Requisition (Part 2)

- **Navigation Path 2**
- On the Jobs menu, click Requisitions.



- Then click Add.



# Steps to Create a Requisition

- The first of three requisition form pages will display.

### Requisition Details

Requisition #  
[Assigned when requisition is saved]

Department/Division \*  
Information Technology

Class Spec \* ⓘ  
IT Project Manager (1159)

Working Title  
IT Project Manager

Desired Start Date  
11/01/2017

Hiring Manager \*  
Jason Hanna Find a hiring manager

Job Type  
Full Time

List Type  
Regular

Number of Vacancies  
1

### Position Details

New Position?  
☒ Yes ☐ No

Position # \*  
000361

Vacancy Date  
11/01/2017

Delete

# Choose your Class Code

- Please choose the class code based on the position you are looking to fill or the transaction you are placing.
- If you are hiring for a position choose the class code of the position the incumbent will be placed into, otherwise choose the code that the incumbent is currently serving in.
- If the class spec you need is not listed, please send an email to Joseph Ornelas (joseph.Ornelas@csusb.edu) who will update the system for you.

Select a Class Spec Cancel

2016-F0032	Academic Advisor/ Talent Search Pr...
2017-F0010	Academic Advisor/ Talent Search Pr...
2866-3	Accompanist II
2866-8	Accompanist II
1762-1	Accountant I
4555-1	Accountant II
4556	Accountant III
1733-1	Accounting Clerk
1730	Accounting Technician I
1741-1	Accounting Technician II

<< < 1 2 ... > >> Items per page 10 ▼

Showing 1 - 10 of 449 items

# Choose your Class Code

- Have you selected the correct class spec? There's a way you can check. From the Class Spec field, click the selected job title to have a closer look. After your review, click Close.

The screenshot shows the 'Create Requisition' form with the 'Class Spec Details' modal open. The form has two tabs: '1. CREATE' (active) and '2. APPROVALS'. The 'Requisition Details' section includes a 'Requisition #' field with a placeholder '[Assigned when requisition is saved]' and a 'Class Spec' field with a dropdown menu showing 'IT Project Manager (1159)'. The 'Class Spec Details' modal is titled 'Class Spec Details' and has a 'Close' button. It contains two sections: 'Description' and 'Benefits'. The 'Description' section includes a paragraph about planning and managing IT projects, and the 'Benefits' section includes a list of duties.

**Create Requisition** [X]

**1. CREATE** **2. APPROVALS**

**Requisition Details**

Requisition #  
[Assigned when requisition is saved]

Class Spec \* ⓘ  
IT Project Manager (1159) [X]

**Class Spec Details** [Close]

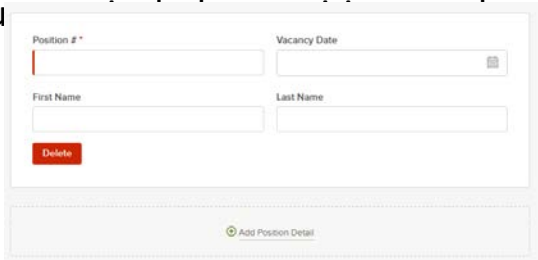
**Description** **Benefits**

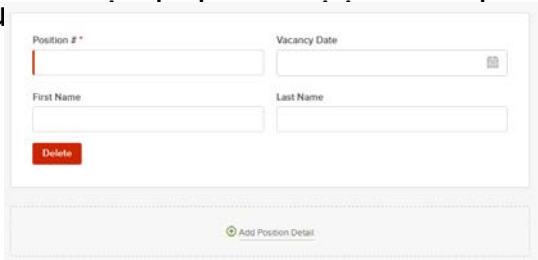
**Description**  
Plan, initiate, and manage information technology (IT) projects. Lead and guide the work of technical staff. Serve as liaison between business and technical aspects of projects. Plan project stages and assess business implications for each stage. Monitor progress to assure deadlines, standards, and cost targets are met.

**Examples of Duties**

- Manage project execution to ensure adherence to budget, schedule, and scope.

# Create New Requisition

- Each requisition should include all required fields as well as:
  - Desired Start date
  - Working Title: Transaction Reason and Employee Name (i.e. Emergency Hire for empl: John Doe)
  - Number of Vacancies
  - Division and Department (if your department is not listed, please contact Shawna Holmquist)
  - Hiring Managers (those who should be included from your department – committee members)
  - Job Term: Full-time, Part-time, Hourly
  - Regular: Staff, Transfer: Faculty, Promotional: UEC
  - Position Type: New or Existing
  - Position Control: You  for each requisition entered into NeoGov.

A screenshot of a web form for creating a new requisition. The form is titled "Create New Requisition" and contains several input fields. The fields are: "Position # \*" (required), "Vacancy Date", "First Name", and "Last Name". There is a red "Delete" button below the "First Name" field. At the bottom of the form, there is a green "Add Position Detail" button.

- Comments: Can be used to state the purpose for the requisition, list the committee for a recruitment or include pay information.



# Create New Requisition (cont.)

- Proposed Salary: please include the hourly or monthly salary depending on type of position
- Annual Salary: should be used to include annual salary including benefits if applicable
- Source of Fund: State General Fund or Other Funding Source
- New Funding: Yes or No option
- Justification of Position: this field was adopted directly from the original PAR and can be used to add justification for department or cabinet review
- If completing any type of transaction other than a recruitment please complete the:
  - Employee Name
  - Employee ID#
- Temporary expiration date: to be used for any temporary requisition, can be the temp end date for an extension or new temp position
- Probationary end date: Please include if looking to hire for a permanent position
- Funding Source: Dept ID, Fund, Account, Class, Program, Unit: This is a mandatory field and should be completed along with the Position Control field.

# Transaction Reasons

- The transaction reasons should be used for the following types of requisitions:
  - *Recruitment*: A job posting (Regular or Pool)
  - *Reassignment*: Used to reassign employee (usually temporarily as voluntary reassignment)
  - *Reclassification*: Position-level job reclassification to change Job Code (used to begin the reclassification process)
  - *Temporary Appointment*: Assign any employee to new temporary appointment or reappoint an active employee to a successive temporary appointment when no separation is posted. The length of the appointment period is limited by an expiration date or other condition of employment.
  - *Extend Temporary Appointment*: To extend a temporary appointment/ emergency hire (the appointment cannot be longer than the designated time allowed by the Bargaining Agreement).
  - *Temp to Prob./Perm Appt.*: Used to appoint a current employee who is changing from a temporary appointment to an appointment where the intent is that employment be regular and continuous.
  - *Pay Plan Change*: (e.g. 12/12 to 10/12, 11/12 or AY) with or without a change in department or class.
  - *In-Range Progression*: Used to process a salary progression within a grade. (Similarly to the reclassification reason this can be used to begin the process for an IRP).
  - *Salary Increase*: equity adjustment or temporary salary increase.
  - *Stipend*: Usually a one time stipend allotted for a specific project and not to be used long term.
  - *Conversion to Permanent*: Used to appoint a current employee who is changing from a temporary appointment to a permanent appointment where the intent is that employment be regular and continuous.
  - *Reinstatement from Temporary Reassignment*: Return to prior appointment upon expiration of temporary reassignment.
  - *Extend Temporary Reassignment*: Used to extend the duration/expiration date of a temporary promotion, temporary reassignment (not to be confused with Extend Temporary Appointment).
  - *Time Base Change*: Used to increase or decrease an employee's time base.
  - *Casual Worker*: Used to hire or extend the appointment of a Casual Worker. Be sure to have the employee submit an application to the Casual Worker pool prior to approval of requisition. Also, please list employee name in the requisition.
  - *Special Consultant*: Used to hire or extend the appointment of a Special Consultant. Be sure to have the employee submit an application to the Casual Worker pool prior to approval of requisition. Also, please list employee's name in the requisition.

# Hiring Process

- Emergency Hire: an emergency appointment used to temporarily fill a vacant position, departments should be considering the next step for all emergency hire positions as they are short term
- Long-term temporary: following a recruitment or as part of an extension of current temporary position
- Permanent Staff Appointment
- MPP Appointment: Any transaction regarding an MPP position
- Express Hire: the department chair/director (MPP Employee's only) will conduct one-on-one interviews with candidates as this type of recruitment
- Casual Worker: a temporary position, not to be used for long term temporary assignments
- Special Consultant: to be used for temporary appointments of personnel (usually hired for a special project)

# Approval Steps

- Once you've completed the form, click Save & Continue to Next Step.
- Skip the approval workflow and click Save & Continue to Next Step. The following steps will detail the first option.
- On the Approval Group pulldown, click the applicable approval group.
- From the Approvers field, click the look up icon, select the applicable approvers, and then click Done.
- Click Add Approval Step.
- Do you have another approval step to add? If so, click Add Approval Group and repeat these steps for the remaining approval steps.
- Are your approval steps in the proper order? If not, you can easily correct with a drag-and-drop operation.

The screenshot displays a vertical list of approval steps. On the left, a vertical line with circular markers numbered 1, 2, and 3 indicates the sequence. Step 1 is 'Budget' with approvers 'Richard Gonzales , + 1 more'. Step 2 is 'County Administrator' with approvers 'Maria Lee , + 1 more'. Step 3 is 'HR' with approvers 'Simon Davies , + 1 more'. A dashed rectangular box highlights the 'HR' step, and a red arrow points to it. At the bottom, there is a button labeled '+ Add Approval Group'.

# Approvals

## Personnel Requests- NEOGOV

	President's Cabinet	Discussion w/ President One-On-One	VP Approval Only
<b><u>New Positions</u></b>			
Permanent <b>New</b> Position	X		
Recruitment for Vacated <b>MPP</b> Position ( <i>temporary or permanent</i> )	X		
Recruitment for Vacated <b>Staff</b> Position ( <i>temporary or permanent</i> )			X
Emergency hires			X
Casual workers			X
Special consultants ( <i>6 months or less</i> )			X
Special consultants ( <i>more than 6 months</i> )		X	
Hourly on-call hires			X
<b><u>Temporary Changes</u></b>			
Temporary Fill of Vacated Position (50% part-time and full-time)			X
Temporary New Position (50% part-time and full-time)	X		
Conversion of Temporary to Permanent Positions	X		
Temporary increase (5% or under)			X
Temporary increase (over 5%)	X		
Extension of Temporary reassignment with increase in pay (but not renewal of temporary appointments)—not a stipend.			X
New temporary reassignments ( <i>5% or under</i> )			X
New temporary reassignments ( <i>over 5%</i> )	X		
Extension of temporary reassignment at same pay rate			X
Renewal of temporary appointments			X
<b><u>Reclassifications and Increase in Pay</u></b>			
Reclassifications (over 5%)	X		
Reclassifications ( 5% or under)			X
In-range progression (5% or under)			X
In-range progressions (over 5%)	X		
MPP equity or salary increases of any amount		X	
Stipend request ( <i>5% or under</i> )			X
Stipend request ( <i>over 5%</i> )	X		

# HR Final Approval

- Please select the HR Manager assigned to your Department/Division from the following list.

## DEPARTMENT/DIVISION DISTRIBUTION FOR EMPLOYMENT AND RECRUITMENT TRANSACTIONS

Rebecca /Candace	Shawna/Jasleen	Angela / Aimee	Alex/Danielle
DEAN: Dr. Peter Williams  CNS-College of Natural Sciences (including Biology, Biochemistry, Chemistry, Computer Science & Engineering, Geological Sciences, Health Science & Human Ecology, Kinesiology, Mathematics, Nursing, Physics)	DEAN: Dr. Chinaka DomNwachukwu  COE-College of Education (including Jim & Judy Watson COE Student Services, Assessment & Research, Curriculum & Archives, Special Education, Rehabilitation, & Counseling, Teacher Education & Foundations, Educational Leadership & Technology)	VICE PRESIDENT/CFO: Dr. Doug Freer Administration & Finance (including Accounting Services, Accounts Payable, Auxiliary Financial Services, Budget, Capital Planning, Design & Construction, Environmental Health & Safety, Facilities Services, Human Resources, Parking & Transportation Services, Payroll, Printing Services, Property Management, Purchasing, Receiving & Mail Services, Risk Management, University Enterprises Corporation, University Police)	DEAN: Dr. Lawrence Rose College of Business and Public Administration (CBPA)
VICE PRESIDENT: Dr. Sam Sudhakar  ITS-Information Technology Services (including Academic Technologies & Innovation, Administrative Computing & Business Intelligence, Enterprise Cloud Services, Information Security & Emerging Technologies, Technology Support Center, Telecommunications & Network Services)	DEAN: Dr. Rafik Mohammed  CSBS-College of Social & Behavioral Sciences (including Anthropology, Criminal Justice, Economics, Environmental Studies, Geography, History, ICDFR-Institute of Child Development and Family Relations, Political Science, Psychology, Sociology, Social Science, Social Work)	DEAN: Dr. Terry Ballman  CAL-College of Arts & Letters (including Art, Communication Studies, English, Liberal Studies, Music, Philosophy, Theatre Arts, World Languages & Literature, RAFFMA-Robert And Frances Fullerton Museum of Art)	EXECUTIVE DIRECTOR: John Griffin  University Enterprises Corporation (including UEC Accounting, Dining, Bookstore, UEC Human Resources, UEC Payroll, UEC Rideshare, Sponsored Programs)
	INTERIM DEAN & ASSOCIATE VICE PRESIDENT: Dr. Craig Seal  US-Undergraduate Studies (including Academic Advising & Services, EOP-Educational Opportunity Program, SAIL-Student Assistance In Learning, Honors Program, Testing & Tutoring, Writing Center)		EXECUTIVE DIRECTOR: Aaron Burgess (SMSU) Auxiliaries (including Association Students Incorporated, Santos Manual Student Union)
	VICE PRESIDENT: Robert Nava  UA-University Advancement (including Development, Strategic Communication, Alumni, Special Events and Guest Services)		DEAN: Cesar Caballero John M. Pfau Library
	DEAN: Dr. Tatiana Karmanova College of Extended and Global Education (CEGE) Center for International Studies & Programs (CISP) (including Visiting Scholars, Study Abroad)		VICE PRESIDENT: Paz Maya Olivérez, Student Affairs
	DEAN: Dr. Dorota Huizinga Graduate Studies		DEAN: Dr. Jake Zhu PDC-Palm Desert Campus
	DIRECTOR: Dr. Diane Podolske  Community Engagement		DIRECTOR: Shawn Farrell Athletics
	DIRECTOR: Rachel Weiss Research and Sponsored Programs Administration		

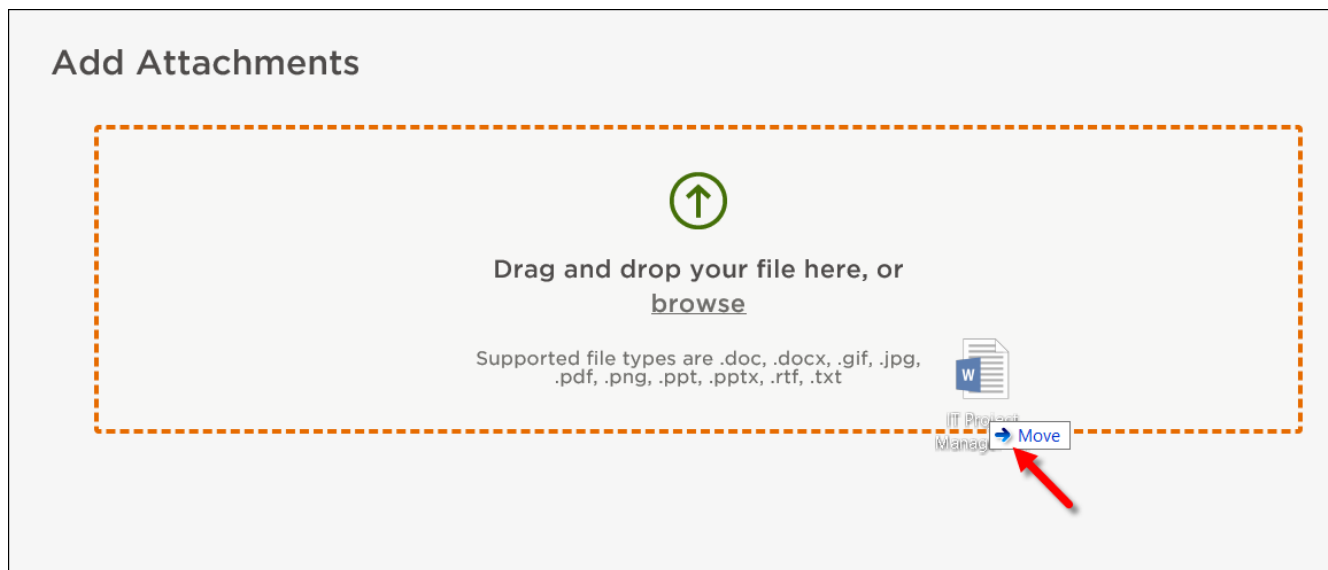
# IRP Approvals

- Your designated Human Resources Manager will need to review the IRP before forwarding it to the Provost/Vice President.
- For IRPs, the approval hierarchy should be as follows:
  1. Dean/AVP/Director (approves the process of HR reviewing the IRP request)
  2. Human Resources (approval means the recommendation is complete)
  3. Provost/Vice President (approval means in agreement with HR's recommendation)
  4. Vice President's Cabinet (VPC - approval means in agreement with HR's recommendation)
  5. Human Resources (approval means to process the outcome of the IRP request)



# Attachments

- Drag any file attachments to the third requisition form page.
  - All positions require a [Position Description](#) be attached to the requisition.
  - For Recruitments, a [Position Description](#) and a [job posting](#) must be attached.
  - For reclassifications, complete the forms found in our [forms](#) section and attach.
  - For In-Range Progressions, attach the In-Range Progression [form](#) found in our forms section and attach.



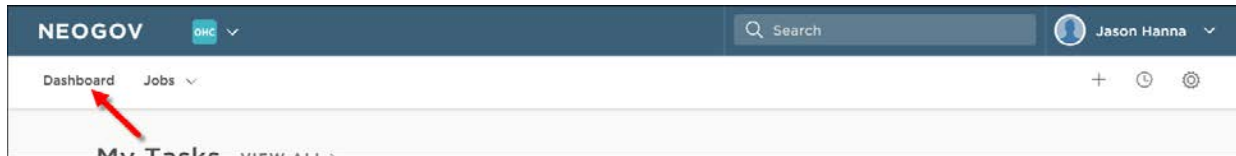
# Attachments (Part 2)

- If you're not quite ready to submit the requisition, click Save & Close. The requisition will display on your dashboard page in the My Requisitions section as a draft.
- Click Save & Submit to release to approvers.

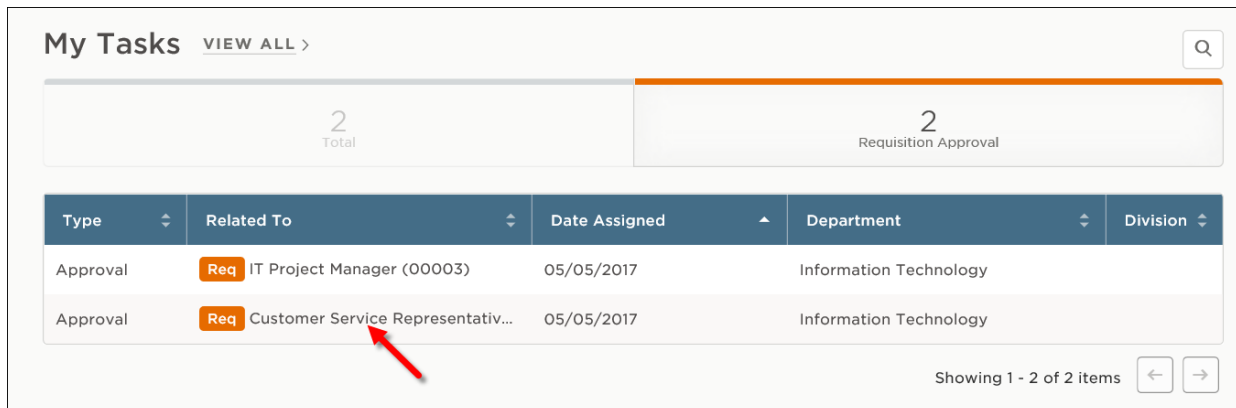
# Approving & Authorizing Requisitions

# Steps to Approve a Requisition

- If you're not already viewing your dashboard page, click Dashboard from the upper left.




- From the My Tasks section, click the requisition pending your review.



# Steps to Approve a Requisition (Part 2)

- Click Approve, type any comments and click Submit.

**Requisition Approval**  
Customer Service Representative (00005)

Cancel

✓ Approve

✗ Deny

|| Hold

Submit

Comment (Optional)

I approve this requisition. Thank you!

Requisition Number

00005

Department

Information Technology

Title

Customer Service Representative

Division

N/A

1

Pending...

**Budget**  
Richard Gonzales , +1 more

2

Pending...

**HR**  
Simon Davies , +1 more

# Steps to Approve a Requisition (Part 3)

- Approvers have the option of denying or placing a requisition on hold. If denied, the requisition record can be sent back to any one of the previous approval groups, or all the way back to the creator. Depending on the circumstances of the denial (e.g., additional justification), the requisition approval process can be restarted.

**Requisition Approval**  
IT Project Manager (00003) Cancel

✓ Approve ✗ Deny || Hold Submit

**Send Back to Step**  
Originator - Hanna Jason

**Comment (Optional)**  
The County Administrator's Office requires a new position justification report (i.e., not a replacement of staff). Thank you in advance for providing this report.

**Requisition Details**

Requisition Number	Department

**APPROVAL TIMELINE**

05/05/2017 by Cheryl Ward

**Budget**  
Richard Gonzalez +1 more

# Steps to Approve a Requisition (Part 4)

- You may review details of the requisition by clicking on the job title. Select the **Approve/Deny** link to the right of the requisition you are working on. Actions you may take are “Approve,” “Deny,” “On Hold/Pending” and “Cancel.”
  - If you **“Approve”** the requisition, it will go to the next approver or human resources, depending on how the original approval chain was set up.
  - If placed **“On Hold/Pending,”** the req creator will see the status change to “On Hold.” He/she may go in and edit the requisition, after which you can approve as appropriate.
  - If **Cancelled**, the requisition status will change accordingly. The req is moved to “Closed Requisitions.”
  - If **Denied**, the requisition will be returned as indicated in the “Return To” field below. The requisition will no longer display on your “My Requisition Approvals” screen, but you may click on “My Requisitions” >> “Show All Reqs in My Dept” >> “Show Approval Details” to see denial activity. Once denied, the requisition creator may edit the requisition and return it to the approver, who will have another opportunity to Approve/Deny.

# OHC Menus

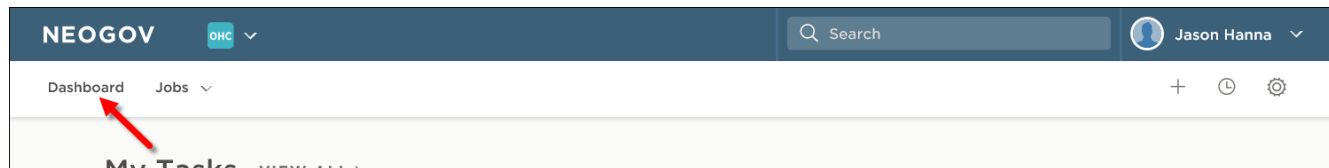
My Tasks

My Requisitions



# OHC Menus

- Whenever you need to return back to the dashboard, click Dashboard, from the upper left.



# OHC Menus – My Tasks

- In the My Tasks section, you can have two different types of tasks pending your review:
  - Requisition Approval
  - Committee Member Review (SME Review)
- The default view displays all tasks pending your review. Click one of the color-coded tabs to view a specific task type.

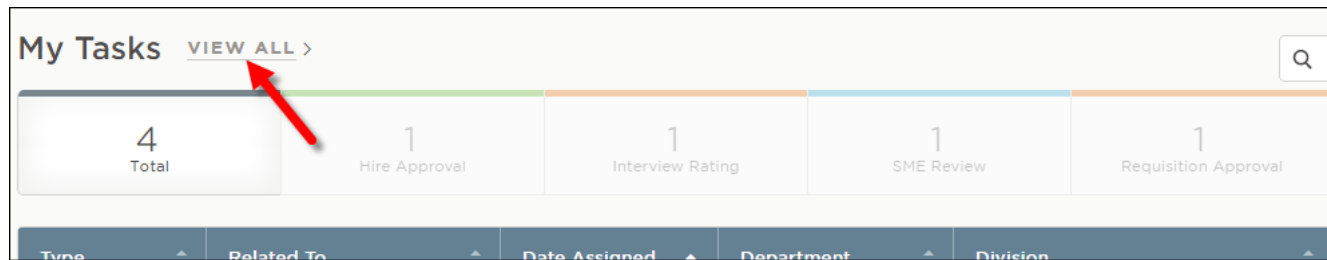
The screenshot shows the 'My Tasks' interface. At the top, there's a header 'My Tasks' with a 'VIEW ALL >' link and a search icon. Below the header is a row of five tabs: '4 Total', '1 Hire Approval', '1 Interview Rating', '1 SME Review', and '1 Requisition Approval'. A red arrow points to the '1 Hire Approval' tab. Below the tabs is a table with the following columns: 'Type', 'Related To', 'Date Assigned', 'Department', and 'Division'. The table contains four rows of data:

Type	Related To	Date Assigned	Department	Division
SME Review (9)	<b>Job</b> Sales Associate (000...	04/28/2016	Sales and Marketing	State and Large Agency Sales
Approval	<b>Req</b> Customer Service Re...	04/28/2016	Operations	Customer Success
Approval	<b>Hire</b> Administrative Assist...	04/29/2016	Operations	Human Resources
Interview (1)	<b>Req</b> Administrative Assist...	04/29/2016	Operations	Human Resources

At the bottom right, there's a pagination control showing 'Showing 1 - 4 of 4 items' with left and right arrow buttons.

# OHC Menus

- To view all tasks, including completed ones, click VIEW ALL.



# OHC Menus – My Requisitions

- In the My Requisitions section, four types of requisitions associated with you will display:
  - Draft – Requisitions you have created and saved, but haven't yet submitted.
  - In-Progress – Requisitions you have submitted and are in progress of being approved.
  - Approved – Requisitions you have submitted and have been approved by all groups.
  - Open – Requisitions you have submitted and have been opened by HR for recruiting.
- The default view displays all draft, in-progress and approved requisitions associated with you. Click one of the color-coded tabs to view a specific requisition type.

### My Requisitions [VIEW ALL >](#)

3  
Total

1  
Draft

1  
In-Progress

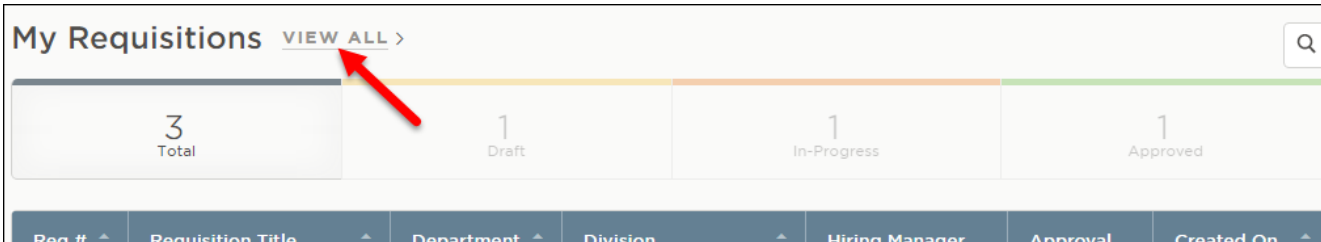
1  
Approved

Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On
00003	<span>Draft</span> Accountant	Operations	Finance	Jason Hanna	<span>🕒 Draft</span>	04/28/2016
00007	<span>Approved</span> .NET Prog...	Development	Production Applications	Jason Hanna	<span>✅ Complete</span>	04/28/2016
00008	<span>In Progress</span> Customer ...	Operations	Customer Success	Jason Hanna +1	<span>🕒 0 of 4</span>	04/30/2016

Showing 1 - 3 of 3 items

# OHC Menus – My Requisitions

- To view all requisitions, including filled and cancelled ones, click VIEW ALL.



My Requisitions [VIEW ALL >](#)

3 Total	1 Draft	1 In-Progress	1 Approved
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Req #	Requisition Title	Department	Division	Hiring Manager	Approval	Created On
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