User's Guide - Offer Card
for Faculty and Academic Student Employees

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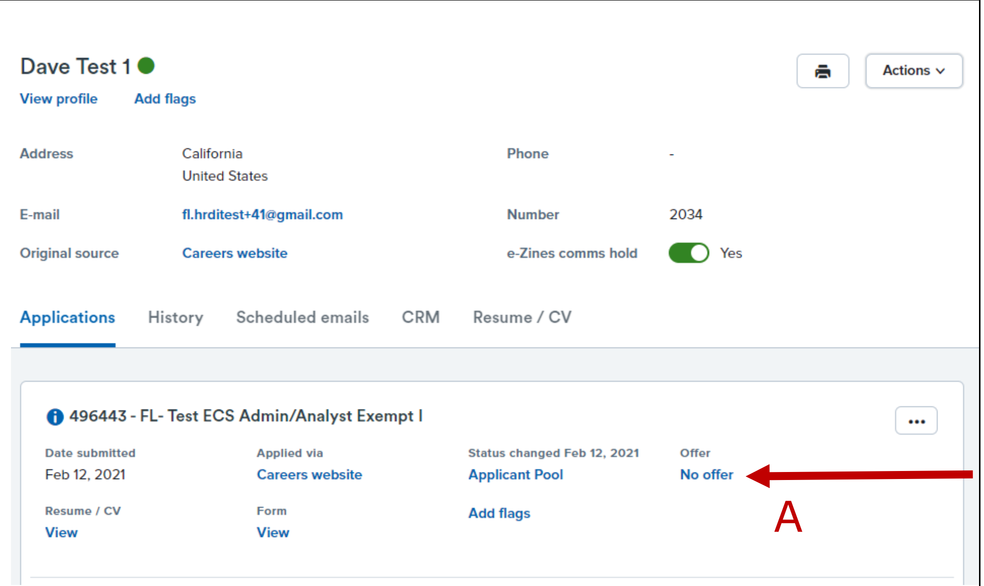
Navigate to the Offer Card

After the Final Candidate is selected for a requisition, details of their offer will be added to the offer card. This offer for faculty hires is coordinated by department users and approved by Academic HR Services. There are 2 ways to access the offer card within CHRS Recruiting.

1. Accessing the Offer Card for a selected candidate through the applicant card

A. Select the "Offer" section of the applicant card

Users should ensure that they select the offer card for the correct job at Fullerton campus. If the candidate applied to more than one campus, applications to all campuses will be visible.

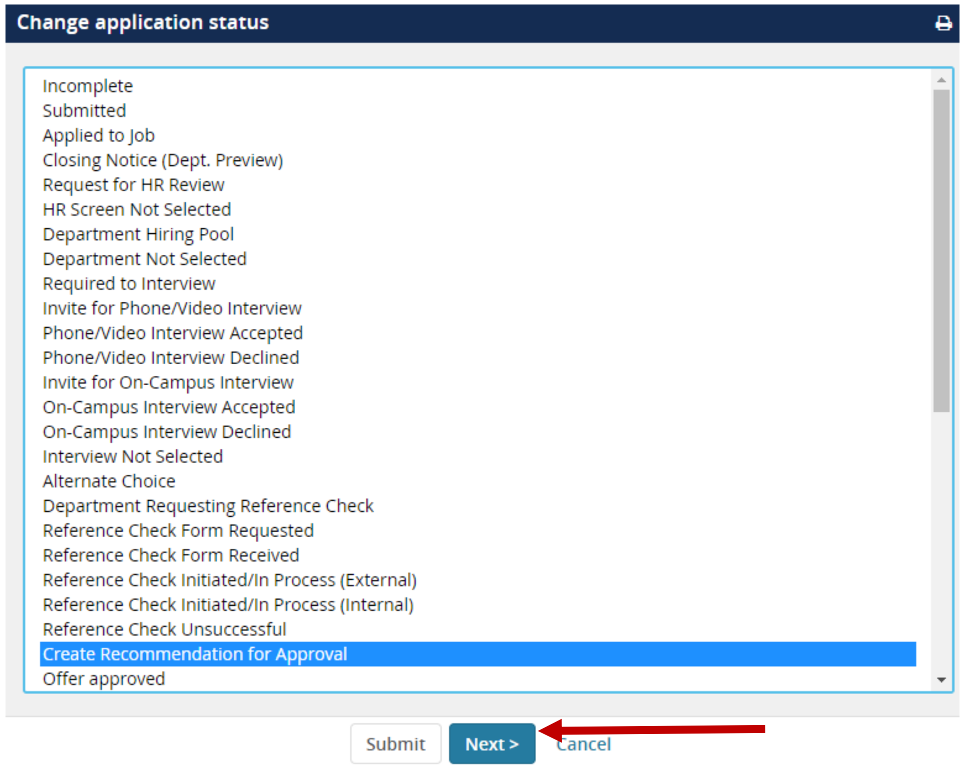


2. Accessing the Offer Card for a selected candidate by updating their application status

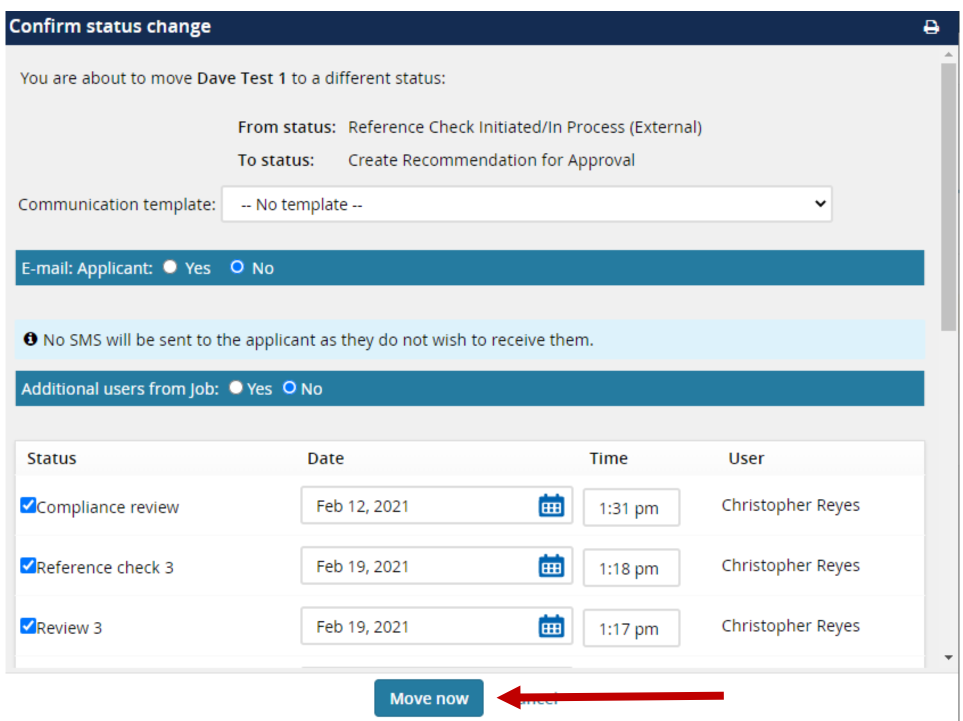
A. Change application status – select the application status that triggers the offer card and select “Next>”

B. Confirm status change – make appropriate selections on the confirm status change screen and select “Move Now”

A

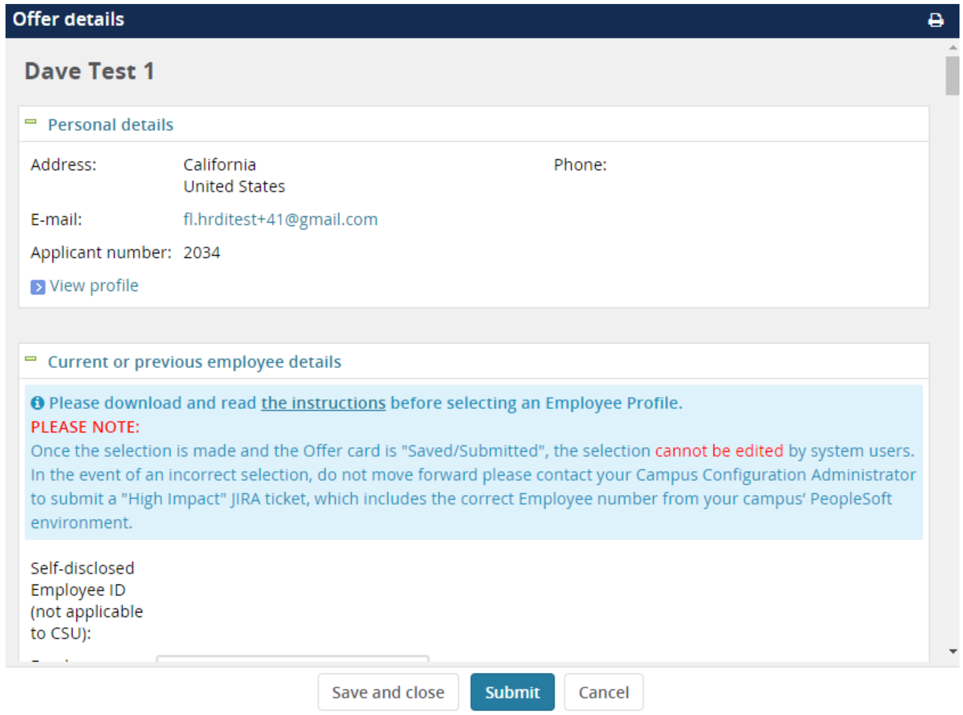


B



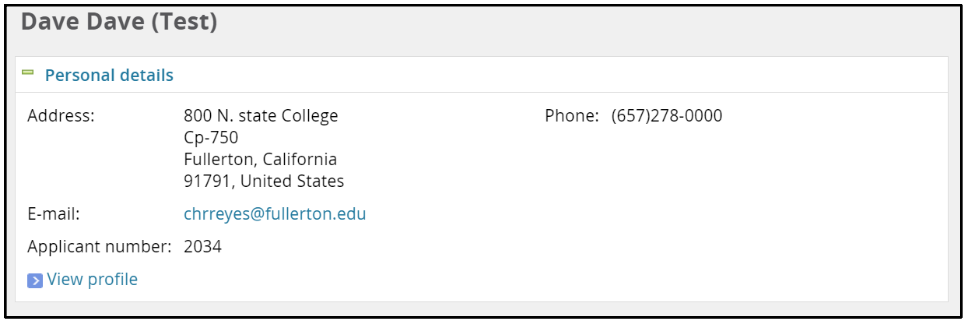
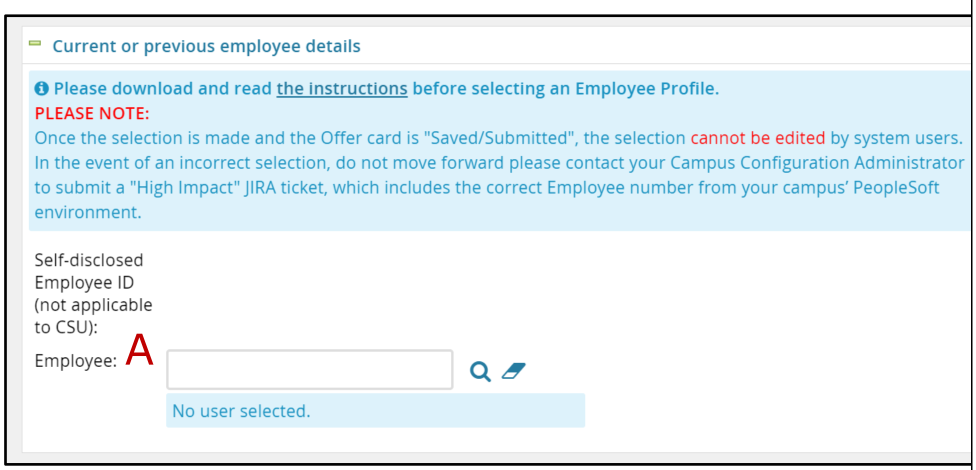
C. Offer details – the "Offer details" screen is the offer card for the selected candidate.

C



Offer Card

The offer card has several sections that relate to the candidate as well as this position. Several fields will be pre-populated with data from the job card.

1. Name and Personal Details The candidates name and details will display, as well as a link to "View Profile" for this candidate.	
2. Current or previous employee details A. The "Employee" field can be used to enter a CWID for a returning employee, or existing employee. **Please note that this field should be left empty for any employee that will be receiving a "Base new hire form." The use of this field and the "Base new hire form" will not export to the staging table.**	

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3. Job Details

This information comes from the job card.

A. Time Basis – Pre-populates from the job card. Please verify.

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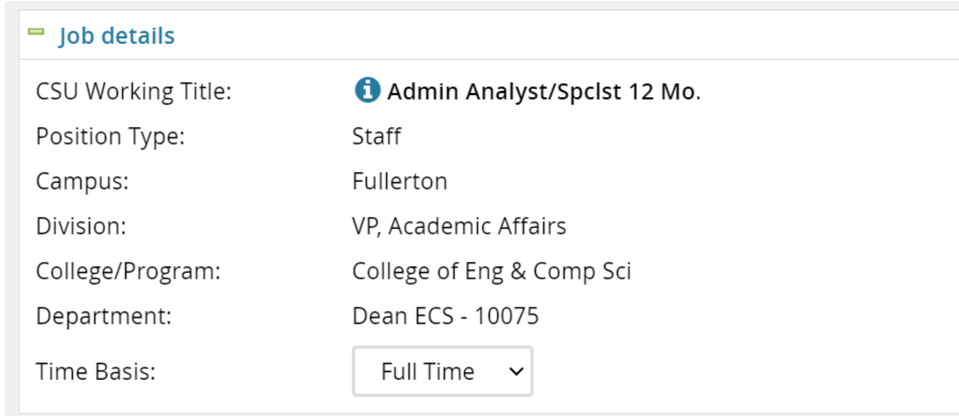

Job details

CSU Working Title: Admin Analyst/Spclst 12 Mo.
Position Type: Staff
Campus: Fullerton
Division: VP, Academic Affairs
College/Program: College of Eng & Comp Sci
Department: Dean ECS - 10075
Time Basis: Full Time

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4. Offer Details

This information comes from the job card.

A. **The "Positions" section is where Users would select the position in which the candidate is being hired, if there are more than one positions within the requisition.**

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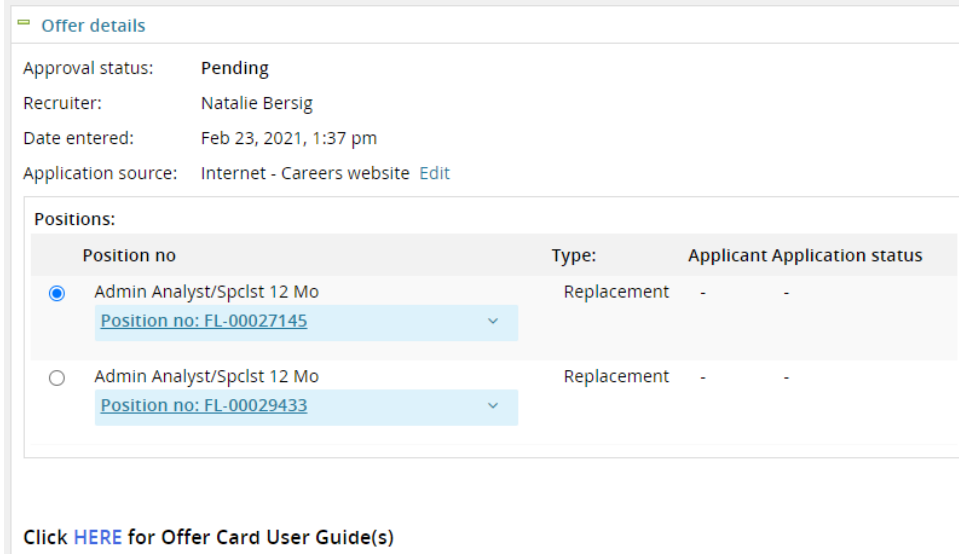

Offer details

Approval status: Pending
Recruiter: Natalie Bersig
Date entered: Feb 23, 2021, 1:37 pm
Application source: Internet - Careers website Edit

Positions:

Position no	Type:	Applicant	Application status
Admin Analyst/Spclst 12 Mo Position no: FL-00027145	Replacement	-	-
Admin Analyst/Spclst 12 Mo Position no: FL-00029433	Replacement	-	-

Click HERE for Offer Card User Guide(s)

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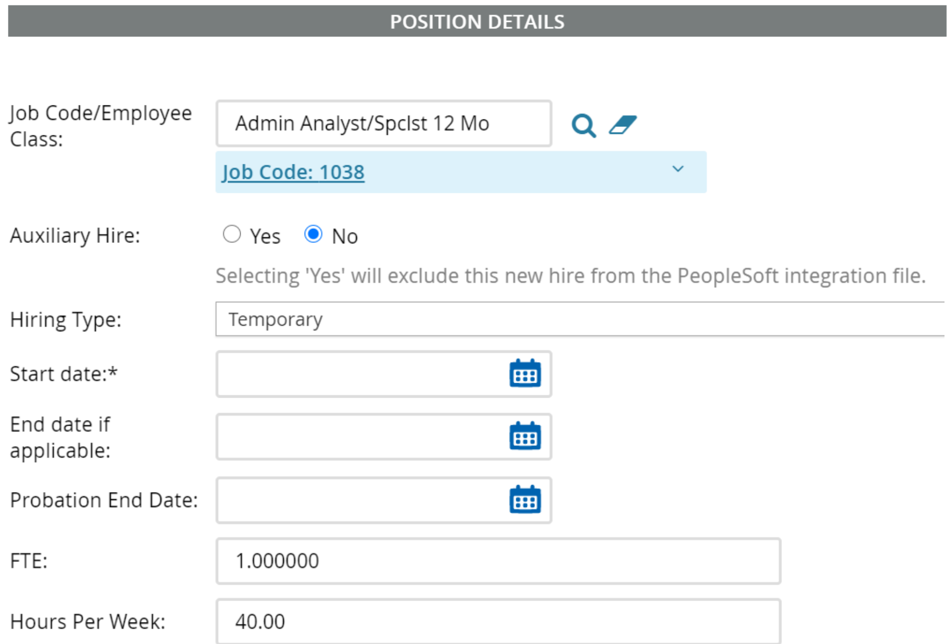
5. Position Details

The fields pre-populate from the Job Requisition

A. **Job Code/Employee Class** – pre-populates form the job card. Please verify.
B. **Auxiliary Hire** – select "No." A "Yes" would be selected by our auxiliary programs if they utilized this system (ASI, ASC).
C. **Hiring Type** - pre-populates form the job card. Please verify.
D. **Start Date** - select the start date for this position. Start dates drive the new hire onboarding tasks. If a start date changes, update this information in the offer card.
E. **End Date if applicable** – enter if this applies. This field is only for temporary employees.
F. **Probation End Date** – enter a date if the if the hiring type is probationary.
G. **FTE** – pre-populates from the job card. Please verify. Please note that an FTE or Faculty Fraction is required on the offer card for integration from CHRS Recruiting to Peoplesoft.
H. **Hours Per Week** – pre-populates from the job card. Please verify.

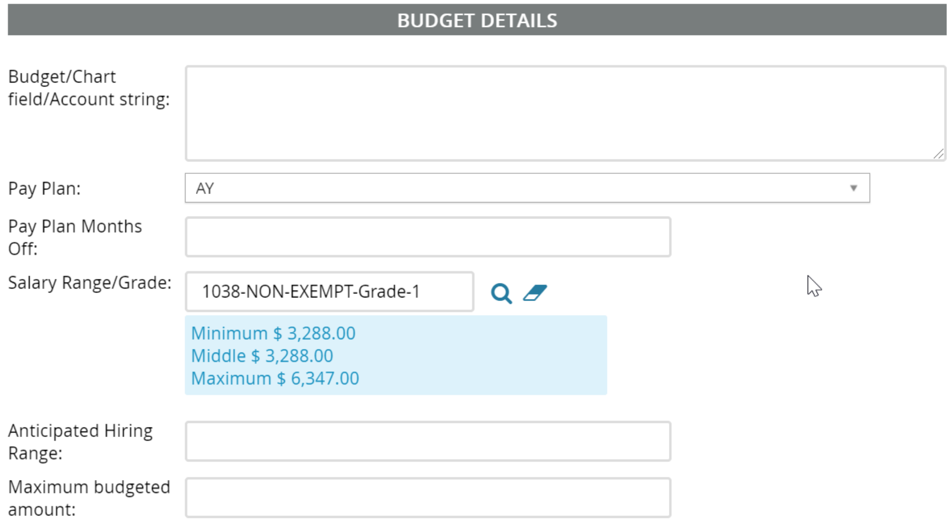


I. **FLSA Status** – pre-populates from the job card. Please verify.
J. **Union** - Select the appropriate union from the list.
K. **Union Language** – Leave blank
L. **Mandated Reporter**- pre-populates from the job card. Please verify.
M. **NCAA** - pre-populates from the job card. Please verify.
N. **Sensitive Position** - Select the appropriate option from the list. Users may reference the corresponding field on the job card.
O. **Conflict of Interest** - pre-populates from the job card. Please verify.
P. **Concurrent Hire** – for Staff/MPP positions "No" should be selected
Q. **Rehired Annuitant** – Select "Yes" if the candidate is a rehired annuitant.


FLSA Status: Exempt
Union: Select
Union Language:
Mandated Reporter: Not mandated
NCAA: Yes No
Sensitive Position: Select
Conflict of Interest: None
Concurrent Hire: Yes No
Rehired Annuitant: Yes No

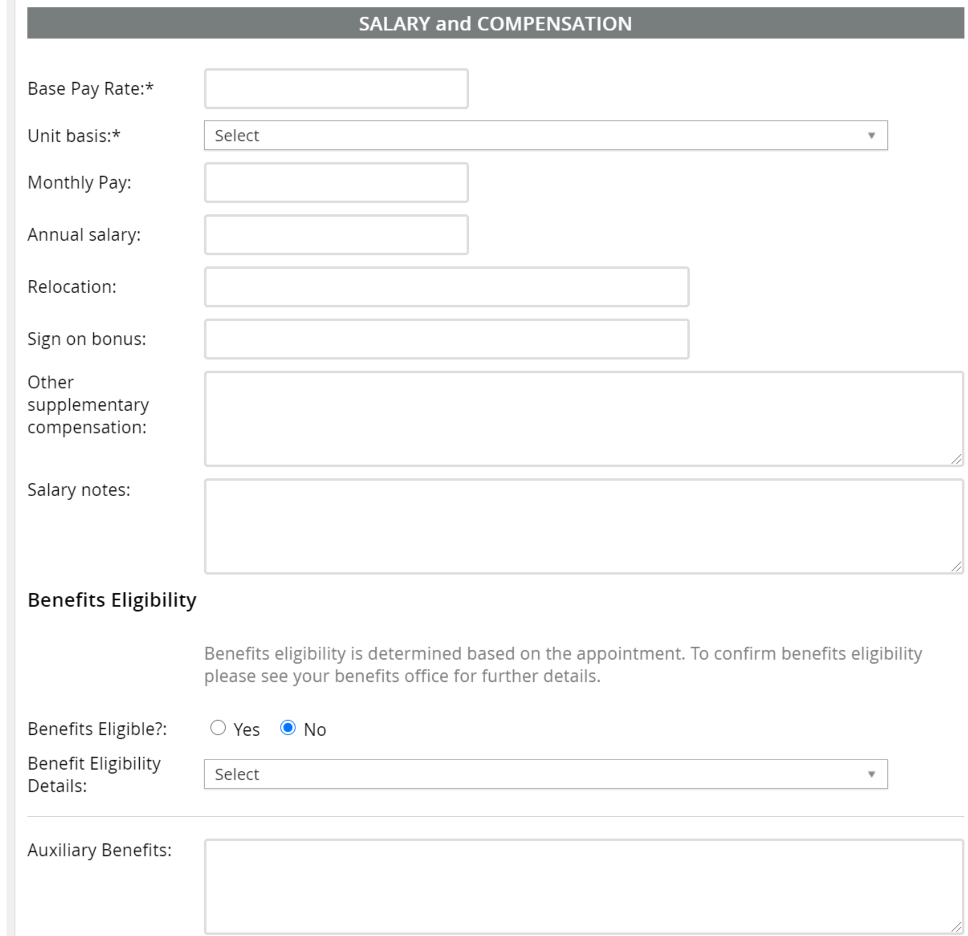
6. Budget Details

A. **Budget/Chart field/Account string** – leave blank.
B. **Pay Plan** – pre-populates from job card. Please verify.
C. **Pay Plan Months Off** – only used for health professions staff new hires.
D. **Salary Range/Grade** - pre-populates from the job card. Please verify.
E. **Anticipated Hiring Range** – pre-populates from the job card. Can be updated if necessary.
F. **Maximum budgeted amount** - Can be updated if necessary.



7. Dates

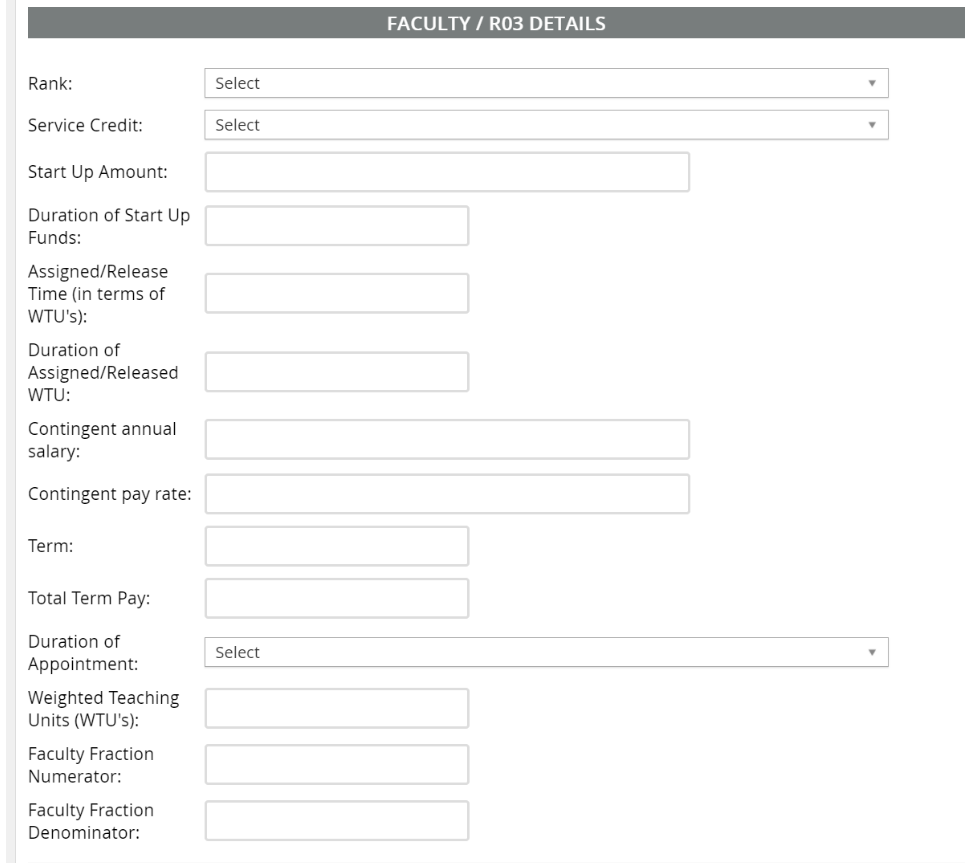
A. **Base Pay Rate** – enter the new employee's salary.
B. **Unit basis** – select the appropriate option.
C. **Monthly Pay** – enter the monthly pay for the employee here.
D. **Annual salary** – optional field.
E. **Relocation** – use if applicable.
   Should not be used for temporary employees.
F. **Sign on bonus** – leave blank
G. **Other supplementary compensation** – enter if applicable.
H. **Salary notes** – can be used for record keeping.
I. **Benefits Eligible** – select the appropriate option.
J. **Benefit Eligibility Details** - select the appropriate option.
K. **Auxiliary Benefits** – leave blank.



8. Faculty / R03 Details

A. Rank – Select option. Used for Tenure Track Faculty.
B. Service Credit – Select appropriate option
C. Start Up Amount – Enter amount if applicable
D. Duration of Start Up Funds – Enter amount
E. Assigned/Release Time – Enter total WTU
F. Duration of Assigned/Released WTU – Enter the total years
G. Contingent Annual Salary – Enter if applicable
H. Contingent Pay Rate – Enter if applicable
I. Term – Enter if applicable
J. Total Term Pay – Enter if applicable
K. Duration of Appointment – Select appropriate option
L. Weighted Teaching Units (WTU's) – leave blank
M. Faculty Fraction Numerator – Enter the numerator or the faculty fraction
N. Faculty Fraction Denominator – Enter the denominator of the faculty fraction

Please note that for the new hire information to transfer to CMS, a faculty fraction numerator and denominator is required.


FACULTY / R03 DETAILS

Rank:	Select
Service Credit:	Select
Start Up Amount:	
Duration of Start Up Funds:	
Assigned/Release Time (in terms of WTU's):	
Duration of Assigned/Released WTU:	
Contingent annual salary:	
Contingent pay rate:	
Term:	
Total Term Pay:	
Duration of Appointment:	Select
Weighted Teaching Units (WTU's):	
Faculty Fraction Numerator:	
Faculty Fraction Denominator:	

Education and License Verification Codes

Educational institutions, majors, and licenses have distinct codes that are used within the United States. Within the offer card is a list of these codes for Users to reference when entering education and license information.

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1. Education and License Verification

Codes for majors, institutes and licenses can be found using the link labeled "Major, Institute and Licenses/Certification Codes" link.

A. **Highest Level of Education** – Select the appropriate option
B. **Degree type** - Select the appropriate option
C. **Terminal Degree for Discipline** – Select the appropriate option
D. **Date of Completion** - Select the appropriate degree date
E. **Major Code** - enter the appropriate code
F. **Institute Code**- enter the appropriate code
G. **License/Certification Code** - enter the appropriate code (if applicable)
H. **License/Certification Number**- enter the appropriate number (if applicable)
I. **License/Certification Expiry Date** – enter the date of expire (if applicable)

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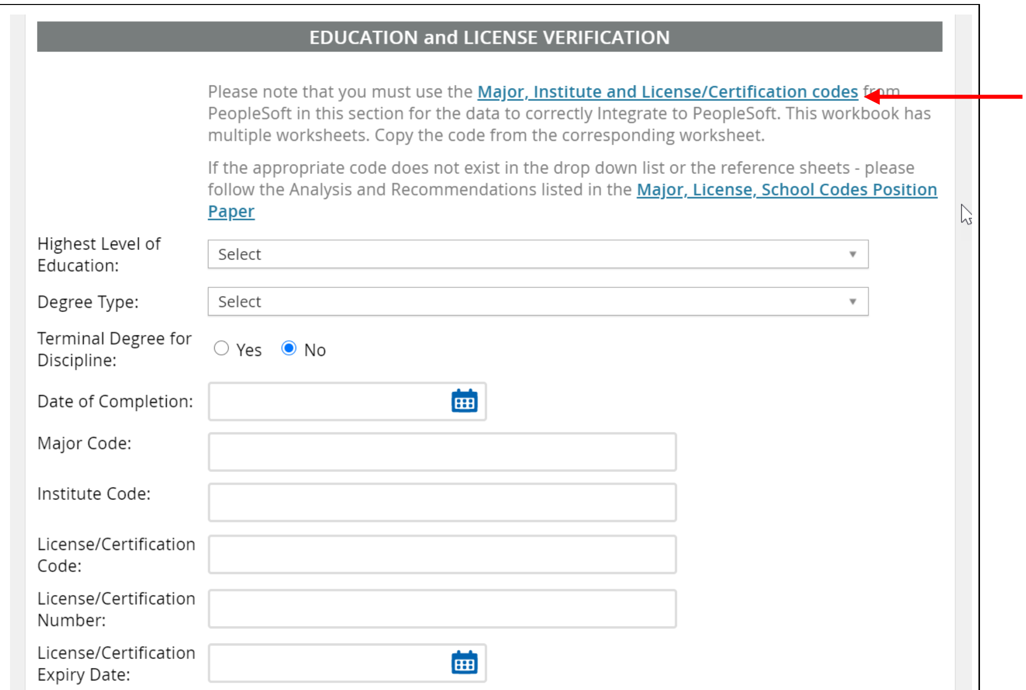

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2. Major, Institute and Licenses/Certification Codes

The link in the previous section will lead to an Excel spreadsheet with tabs for each set of codes can be accessed by Users.

A	B	C
MAJOR_CODE	***DESCR***	***DESCRSHORT***
00795	Chemical & Life Sciences	CLS
00915	Coatings & Polymeric Materials	CPM
01153	Environment Mgmt & Protection	EMP
01625	Global Business	Glbl Bsn
10	ANA Board Certificate	ANA Board
100	Agricultural Biochemistry	Agricultur
1000	Construction	Constructi
1010	Construction Management	Constructi
1020	Consumer Science	Consumer S
1030	Counseling	Counseling
1040	Counseling Psychology	Counseling
1050	Creative Arts	Creative A
1055	Criminal Justice Administratio	Criminal J
1060	Criminology	Criminolog
1070	Crop Physiology	Crop Physi
1080	Crop Science	Crop Scien
1090	Dairy Science	Dairy Scie
110	Agricultural Business	Agricultur
1100	Dance	Dance
1110	Data Process Equip Maintenance	Data Proce
1120	Data Processing	Data Proce
1130	Dentistry	Dentistry
1135	Developmental and Cell Biology	Developmen
1140	Developmental Psychology	Developmen
1150	Dietetics	Dietetics
1160	Diploma in Counseling Psych of	Diploma in
1170	Drama	Drama
1180	Drawing	Drawing

Majors | Schools | Licenses

Employment Checks

1. Employment Checks

A. **Background Check** – select appropriate option.

B. **Background Check Codes** – select either of the options below:

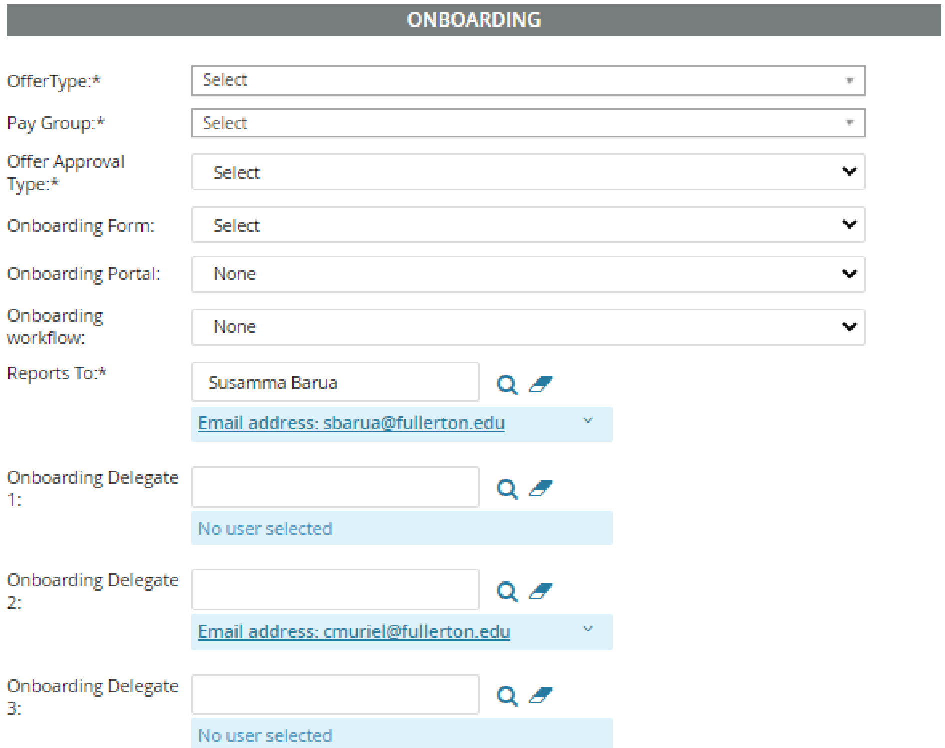
- B01- Accurate
- B11- Accurate and Livescan

C. **Pre-placement physical** – select no

2. Onboarding

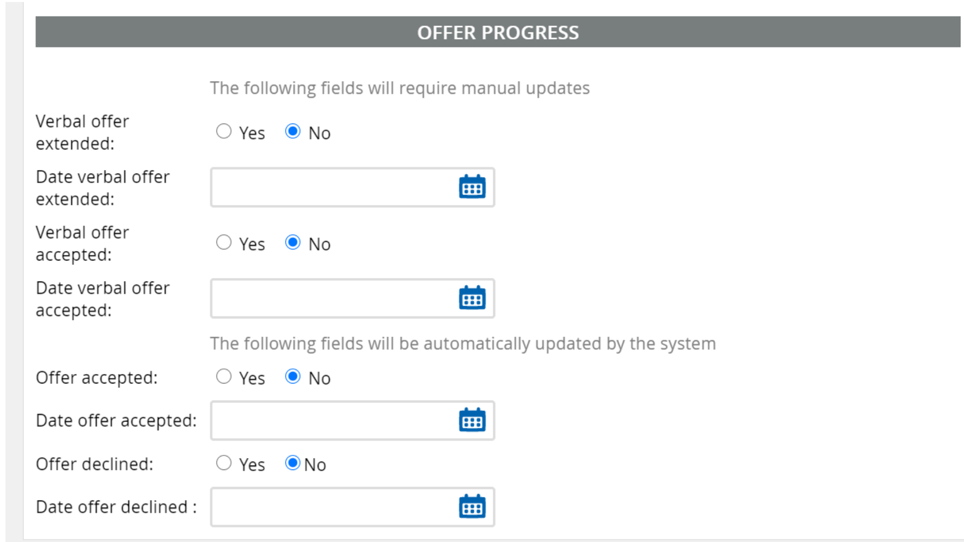
A. **Offer Type** – select appropriate option.
B. **Pay Group** – select the appropriate option
C. **Offer Approval Type** – Select “FL”
D. **Onboarding Form** – select “Base New Hire Form” if this is a new hire or separated returning employee (if applicable)
E. **Onboarding Portal** – select FL Onboarding Portal if the “Base New Hire Form” is selected
F. **Onboarding workflow** – select appropriate option if the FL Onboarding Portal is selected
G. **Reports To** – pre-populates from the job card. This user will have access to the onboarding tasks discussed in the letter “H”
H. **Onboarding delegates** – Enter the names of users that will support the onboarding of the new hire. These users will be able to review the new hire tasks assigned to both the new hire, and the tasks assigned to the supervisor

   - Onboarding delegates 2 and 3 will be the only users to receive e-mail reminders of tasks needing to be completed



3. Offer Progress

A. **Verbal Offer extended** – select "Yes" once the offer has been extended.
B. **Date verbal offer extended** – select the date the verbal offer was made.
C. **Verbal offer accepted** - select "Yes" once the verbal offer has been accepted.
D. **Date verbal offer accepted** - select the date the verbal offer was accepted.
E. **Offer accepted** – Pre-populates. The recruiter and hiring manager will be notified with an e-mail template once the offer has been accepted. (See Example 1)
F. **Date offer accepted** - Pre-populates.
G. **Offer declined** – used by a recruiter if a candidate declines the offer.
H. **Date Offer Declined** – select the date of the decline.



Example 1

Hi Juanita Arreola / Carlos Leija,

Congratulations! Nicole Bailey has accepted their offer for the 498266 - Senior Director of Development, College of Humanities and Social Sciences.

Their anticipated start date will be on 1 Mar 2021.

Your recruiter will be in touch with the offer letter and details of employment.

Regards,

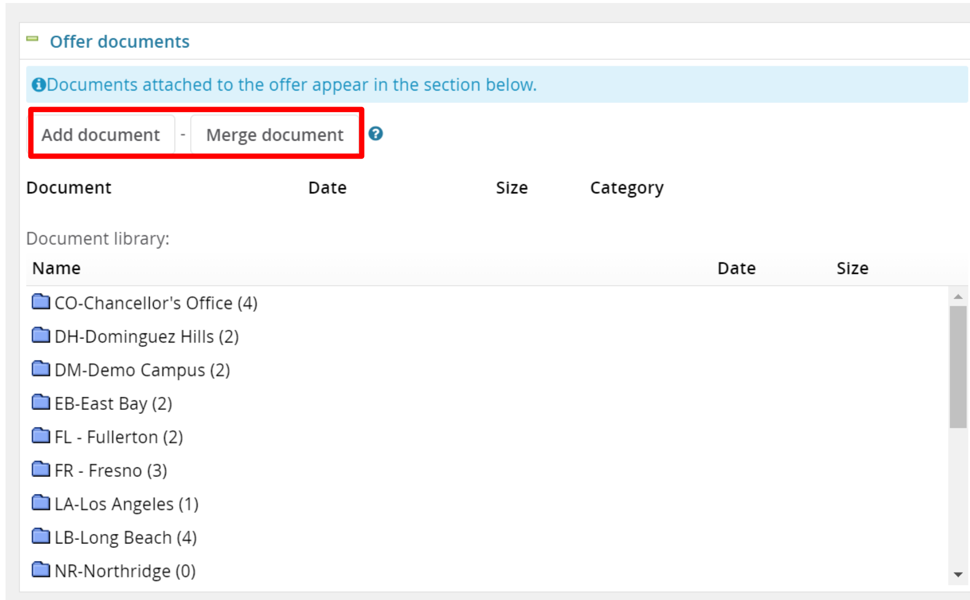
Fullerton Recruitment Team

Offer Documents

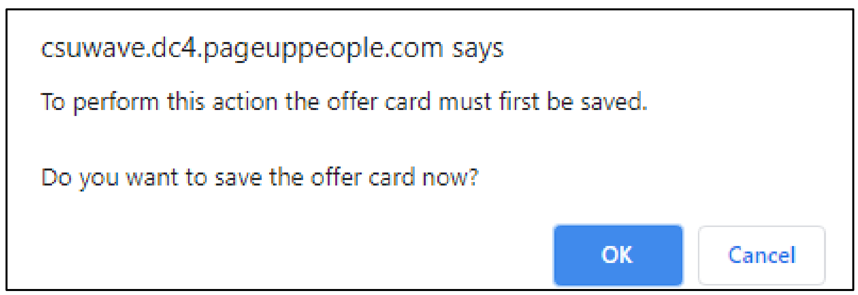
In this section Users will attach the position description (or Job Card for quick hires) and an offer letter. Offer letters can be attached to the offer card through the "Add document" and "Merge document" button

1. Offer Documents

Please note that adding or merging a document will require that the offer card be saved before proceeding (**See Example 2**). All mandatory fields of the offer card must be completed before you can save, and then add or merge a document.

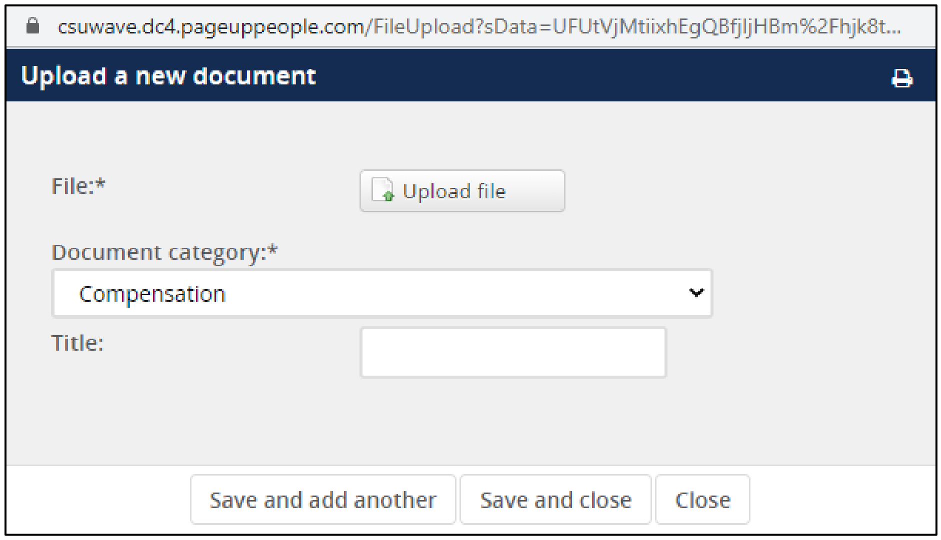


Example 2



2. Add Document

A. Selecting "Add document" will open the "Upload a new document" screen. Users can select a file to upload, select a document category, and add a title



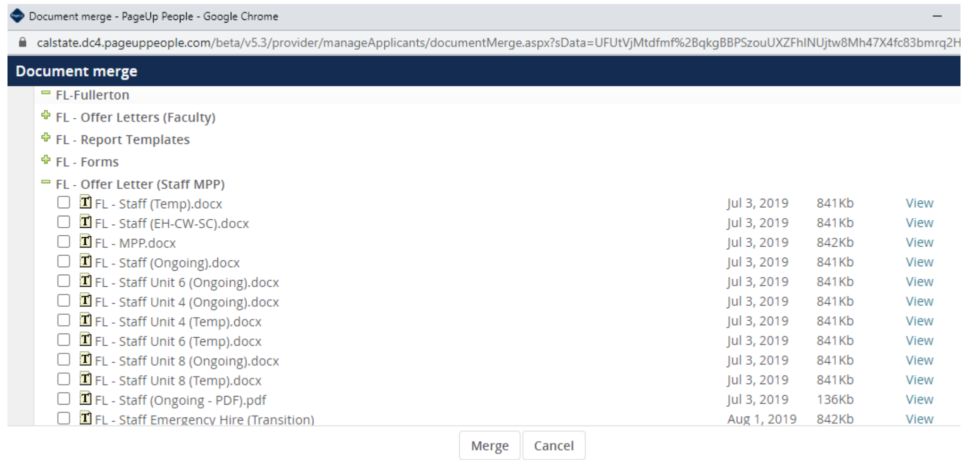
3. Merge Document

A. Fullerton Staff/MPP offer letter templates are found by the following navigation:

FL-Fullerton > FL-Offer Letter (Staff MPP)

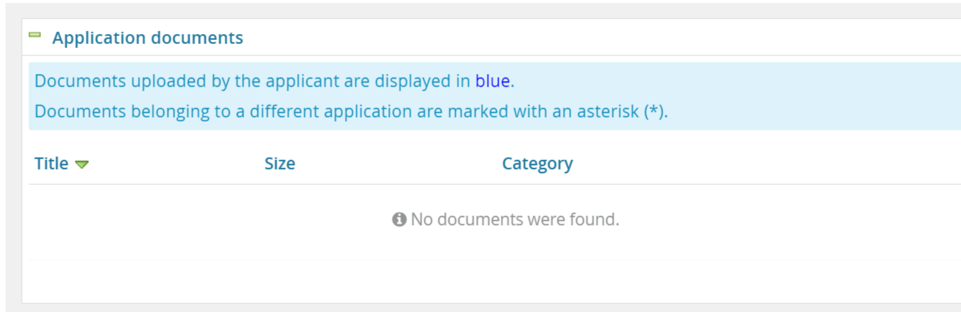
B. Users can view a file, or select a file to merge

C. These documents have merge fields (e.g. employee name, address, job title, base pay)



Application Documents

In this section, Users can find all documents that have been attached to this candidate’s profile for this requisition.

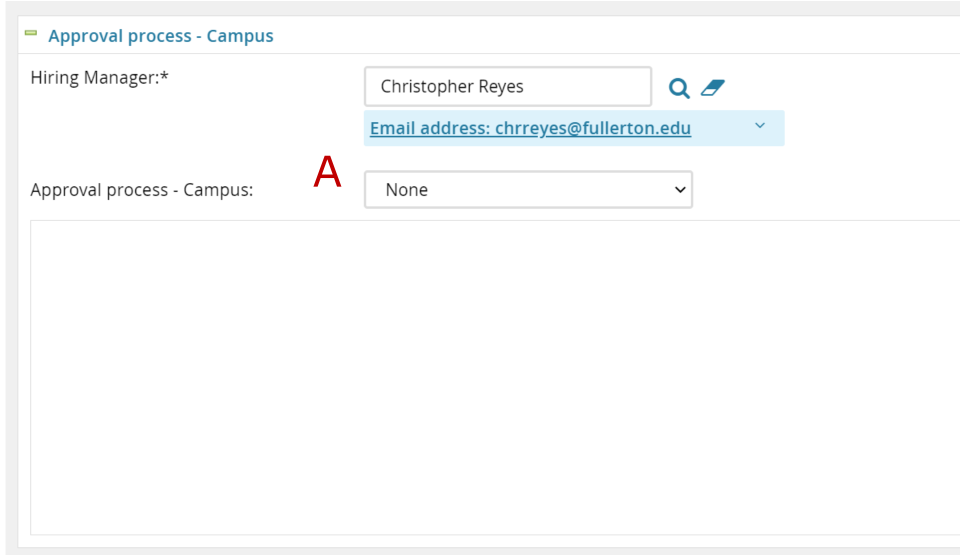
1. Application Documents Applicants can attach documents to this job during recruitment (certificates, licenses, etc.). These documents are accessible to Users in this section of the offer card.	

2. Approval Process – Campus

A. Users can select the approval process that relates to this offer.

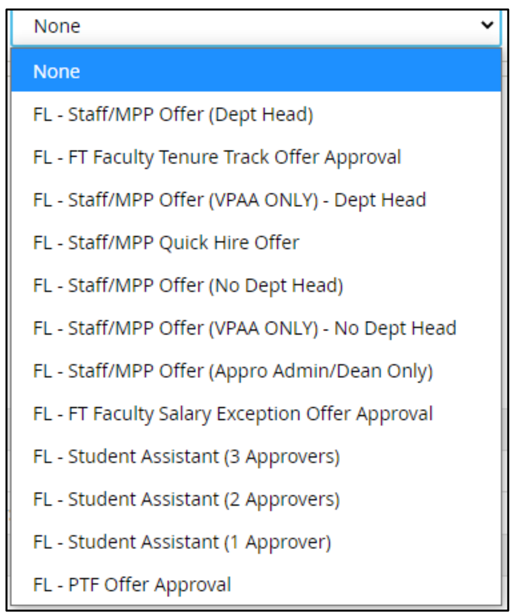
Please note that the "Offer Approval Type" field in the Onboarding section of the offer card must be set to "FL" to see options for our campus.

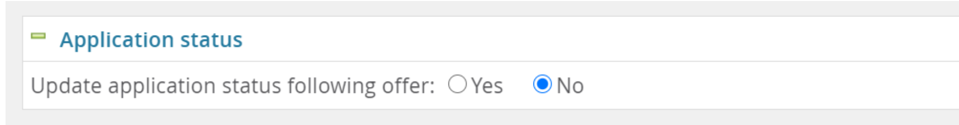
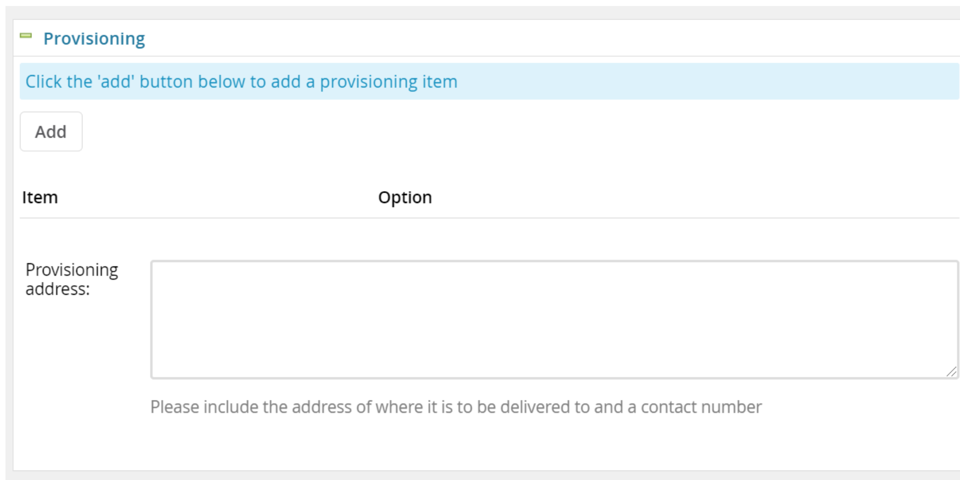
A



B. These are all of the approval process options for the campus.

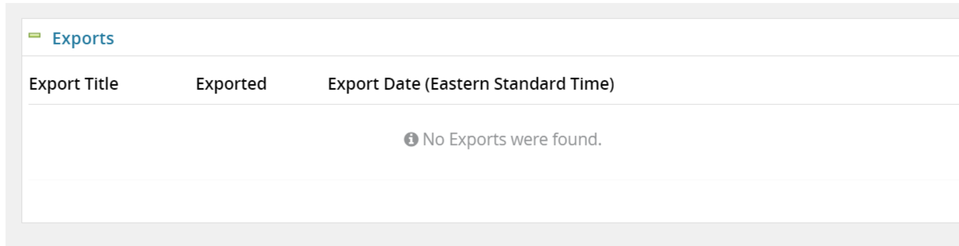
B



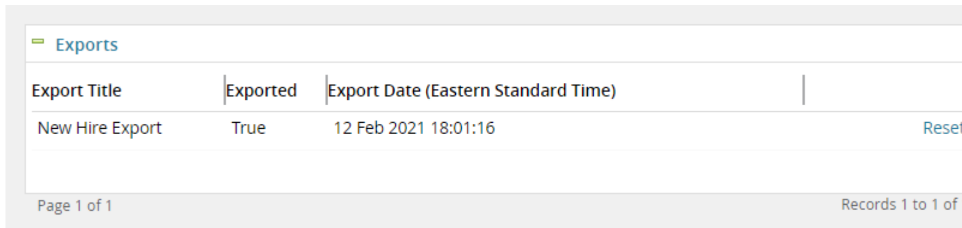
3. Application Status Leave as “No.” Selecting Yes triggers the online offer to the candidate.	
4. Provisioning Leave this section blank.	

5. Exports

A. The exports section is used to determine if the information on the offer card was successfully sent to the Peoplesoft staging table, after the candidate accepted the offer in their CHRS Recruiting candidate portal.



B. This is an example of a successful transfer of information from the offer card to the staging table, after the candidate accepted the position. The "Exported" field should read as "True."



Department users should note that data that is found on the offer card carries over from the job card. Also, department users that have access to the offer card can make changes. Users should verify fields before submitting/approving offer cards to ensure they are accurate.