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 Breanna Baeza bbaeza@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.
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 chose 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.
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.
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 Breanna)
  – 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 must include a position number for each requisition entered into NeoGov.

  – 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.
Approvals

Personnel Requests- NEOGOV

President's Cabinet Approval
Permanent New Position
Any personnel transaction resulting in a pay increase above 5%

Discussion with President Morales
MPP equity or salary increases of any amount
Special consultants

Vice President Approval Only
Any permanent or temporary personnel transaction resulting in a pay increase of 5% or less
Replacement of vacated MPP and staff positions
Emergency hires, casual workers, hourly on-call hires
Conversion of Temporary to Permanent Positions
Extension of temporary assignments
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

(Revised 10/11/2017)

<table>
<thead>
<tr>
<th>Cesar/Stacey</th>
<th>Rebecca/Candace</th>
<th>New Manager/New Processor</th>
<th>Angela/Aimee</th>
<th>Alex/Breanna</th>
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</table>
| FACULTY SENATE CHAIR: Dr. Karen Kolehmainen | DEAN: Tatiana Kamaranova  
College of Extended Learning (CEL) | DEAN: Dr. Jay Feine  
CBE-College of Education (including Jim & Judy Watson CBE  
Student Services, Assessment & Research, Curriculum & Archives,  
Special Education, Rehabilitation, & Counseling, Teacher Education  
& Foundations, Educational Leadership & Technology) | VICE PRESIDENT/CEO: Dr. Doug Frear  
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) | College of Business and Public Administration (CBPA) |
|                    |                           |                                                |                                                                     |                                        |
| DEAN: Dr. Sharon Brown-Welty  
PDC-Palm Desert Campus | 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. Rafik Mohammed  
CSBS-College of Social & Behavioral Sciences (including Anthropology, Criminal Justice, Economics, Environmental Studies, Geography, History, IEDR-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, RASHMA-Robert And Frances Fullerton  
Museum of Art) | EXECUTIVE DIRECTOR: John Griffin  
UEC-University Enterprises Corporation (including UEC Accounting, Dining, Bookstore, UEC Human Resources, UEC Payroll, UEC RideShare, Sponsored Programs) |
|                    |                           |                                                |                                                                     |                                        |
|                    |                           |                                                |                                                                     | EXECUTIVE DIRECTOR: Aaron Burgess  
(SM/SU), Auxiliaries (including Association  
Students Incorporated, Santos Manual  
Student Union) |
|                    |                           |                                                |                                                                     |                                        |
|                    |                           |                                                |                                                                     |                                        |
|                    |                           |                                                |                                                                     |                                        |
|                    |                           |                                                |                                                                     |                                        |
|                    |                           |                                                |                                                                     |                                        |
|                    |                           |                                                |                                                                     |                                        |
| PRESIDENT: Dr. Tomas Morales  
Office of the President | 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) | DIRECTOR: Dr. Diane Podolske  
Community Engagement |                                                                     |                                        |
|                    |                           |                                                |                                                                     |                                        |
| PROVOST AND VICE PRESIDENT,  
ACADEMIC AFFAIRS: Dr. Shari McMahon  
Provost's Office | DIRECTOR: Annelis Adams  
Center for International Studies & Programs (including Visiting Scholars, Study Abroad) | 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) |                                                                     | John M. Pfau Library |
|                    |                           |                                                |                                                                     |                                        |
|                    |                           |                                                |                                                                     |                                        |
|                    |                           |                                                |                                                                     | Student Affairs |
| Academic Personnel | AVP: Cynthia Crawford  
Research and Sponsored Programs Administration | VICE PRESIDENT: Dr. Ron Fremont  
UA-University Advancement (including Development, Strategic Communication, Alumni) |                                                                     |                                        |
| Dr. J. Paul Vicknair |                           |                                                |                                                                     |                                        |

Notes:
1) For faculty transactions, contact Academic Personnel or Aimee Salazar
2) For student employment transactions, contact Rodrigo Mercado
3) HR Manager back-up: Rebecca for Alex, Alex for Rebecca; Angela for New MPP, New MPP for Angela

©/HR Managers
<table>
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<tr>
<th>DeptID</th>
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<th>Division</th>
<th>Manager</th>
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<tr>
<td>D0200</td>
<td>Accounting Office</td>
<td>Administration and Finance</td>
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<td>D0210</td>
<td>Accounts Payable Office</td>
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<td>D0240</td>
<td>Acctg - Student Financial Sysc</td>
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<td>Acctg - General Accounting</td>
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<td>D0280</td>
<td>Acctg - Reporting &amp; Tax</td>
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<td>D0300</td>
<td>AVP Finance &amp; Admin Services</td>
<td>Administration and Finance</td>
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<td>D0400</td>
<td>University Budget Office</td>
<td>Administration and Finance</td>
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<tr>
<td>D0800</td>
<td>Human Resources</td>
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<tr>
<td>D0820</td>
<td>HR - Payroll</td>
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<td>D0930</td>
<td>HR - Staff Development Center</td>
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<td>D0700</td>
<td>FM-Administration</td>
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<td>D0722</td>
<td>FM - Building Maintenance</td>
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<td>D0724</td>
<td>FM - Grounds</td>
<td>Administration and Finance</td>
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<td>D0730</td>
<td>FM - Custodial Services</td>
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<tr>
<td>D0740</td>
<td>FM - Heating &amp; Air</td>
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<tr>
<td>D0750</td>
<td>FM - Automotive</td>
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<tr>
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<td>F0100</td>
<td>ITS-Vice President Office</td>
<td>Information Technology Service</td>
<td>Rebecca Christopher</td>
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<td>F0101</td>
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<td>Rebecca Christopher</td>
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<td>F0300</td>
<td>ITS-CreativeMediaServicesAdmin</td>
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<td>Rebecca Christopher</td>
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<td>F0402</td>
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<td>F0406</td>
<td>ITS-Enterprise and Cloud Svcs</td>
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<tr>
<td>F0415</td>
<td>ITS-AcadTechologies &amp; Innovation</td>
<td>Information Technology Service</td>
<td>Rebecca Christopher</td>
</tr>
</tbody>
</table>
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.
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.
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.
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 Table]

<table>
<thead>
<tr>
<th>Req #</th>
<th>Requisition Title</th>
<th>Department</th>
<th>Division</th>
<th>Hiring Manager</th>
<th>Approval</th>
<th>Created On</th>
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<tr>
<td>00003</td>
<td>Draft Accountant</td>
<td>Operations</td>
<td>Finance</td>
<td>Jason Hanna</td>
<td></td>
<td>04/28/2016</td>
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<td>Approved .NET Prog</td>
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<td>Production Applications</td>
<td>Jason Hanna</td>
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<td>Customer Success</td>
<td>Jason Hanna +1</td>
<td>Draft</td>
<td>04/30/2016</td>
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</tbody>
</table>

Showing 1 - 3 of 3 items
OHC Menus – My Requisitions

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