Introduction

Once the verbal offer is accepted, the offer letter will be prepared in CHRS Recruiting then forwarded via email and/or DocuSign for approval. Offers for Faculty positions will be prepared and extended at the college or department level; please confirm the process with your College/HR Contact. The final approved letter will be forwarded to the candidate for review and signature via DocuSign. Once the letter is signed and the background check is clear, the final offer will be prepared and extended in CHRS Recruiting.
Prepare the Offer

Log into CHRS Recruiting

1. Navigate to one.SJSU
2. Search for or click the CHRS Recruiting tile
3. Use your SJSUOne ID and password to log in

The Tiled Dashboard is Displayed

Please note, depending on your role the dashboard will look different.

1. From the tiled dashboard, click Jobs (A)

Select the Applications for the Job

2. Click the hyperlinked number (A) of applications for the job for which you wish to make an offer
The List Dashboard is Displayed

1. Change the View to Approved Jobs by clicking the appropriate circle (A)
2. Click the hyperlinked number of applications next to the icon of the appropriate job (B); if the candidate has already been moved to Prepare Offer you can click the hyperlink underneath the job title (C)

Whether you navigate from the Tiled or List Dashboard, the list of applicants is displayed

1. Click the Status of the candidate for which you wish to extend an offer (A)
Move the Candidate to the Prepare Offer and Upload Transcripts status

1. Select the step in the status list (A)
2. Click Next (B)

Confirm the status change

3. No communication will be sent to the candidate at this step (A)
4. If applicable, open the Additional users section and prepare the email (B)
5. If prompted to change the job status, do not change the status; this is only changed for Tenure-Track or Full-Time Temp recruitments
6. Click Move now (D)
The Offer details window opens: Verify the Personal Details

1. Confirm the Address, Phone and Email information (A)
2. If the candidate is a current employee, enter their name in the Employee field (B). If the candidate is new or was a former SJSU employee (no longer active) do NOT enter their name here.
## Verify the Job and Offer Details

3. Review the Job details (A)
4. Review the offer details (B)
5. Confirm the position information; if there are multiple positions in the recruitment, make sure the correct one is selected (C)

Please note: If the position you select is in a different classification or grade/rank than the original position, you may have to update the Salary Range/Grade in the Budget Details section.
### Verify and update the Position Details

6. Verify the job code and hiring type (A)
7. Enter the Start date and the End date (B)
8. Verify the FTE and Hours Per Week; verify or select the FLSA Status (all faculty are exempt) (C)
9. Verify the Mandated Reporter and Conflict of Interest data (D)

![Offer details](image)

### Verify the Budget Details

1. Ensure the Pay Plan is selected (AY for most faculty; some may be 12-months) (A)
2. Verify the Salary Range/Grade (B) - if the position you chose was in a different range/grade, you are required to change this information to match

![Offer details](image)
**Update the Salary and Compensation information**

10. Enter the Base Pay Rate (A)
11. Select Monthly as the Unit basis (B)
12. Enter the Monthly Pay (C)

If you are planning to offer relocation or other supplementary compensation, you may key those values here. They can also be added on the letter.

*Please note, you do not need to enter or select anything in the Benefits Eligibility section.*
**Complete the Faculty/R03 Details**

13. Enter the Total Term Pay (A)
14. Select the Duration of the Appointment (B)
15. Enter the WTUs and Faculty Fraction (C, D, E)

To assist in calculating the part-time temp information, use the [Compensation Calculators](#) on the UP Website.

<table>
<thead>
<tr>
<th>FACULTY / R03 DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rank: Select</td>
</tr>
<tr>
<td>Service Credit: Select</td>
</tr>
<tr>
<td>Start Up Amount:</td>
</tr>
<tr>
<td>Duration of Start Up Funds:</td>
</tr>
<tr>
<td>Assigned/Release Time (in terms of WTUs):</td>
</tr>
<tr>
<td>Duration of Assigned/Released WTU:</td>
</tr>
<tr>
<td>Contingent annual salary:</td>
</tr>
<tr>
<td>Contingent pay rate:</td>
</tr>
<tr>
<td>Term:</td>
</tr>
<tr>
<td>Total Term Pay:</td>
</tr>
<tr>
<td>Duration of Appointment: Select</td>
</tr>
<tr>
<td>Weighted Teaching Units (WTUs):</td>
</tr>
<tr>
<td>Faculty Fraction Numerator:</td>
</tr>
<tr>
<td>Faculty Fraction Denominator:</td>
</tr>
</tbody>
</table>
### Enter the Education and License information

1. Use the PS 9.0 Major, Institute and License/Certification codes file to complete this section (A)
2. Select the candidate’s Highest Level of Education (B)
3. Select the candidate’s Degree Type (C)
4. Select whether the candidate’s degree is the Terminal Degree for Discipline (D)
5. Enter the Date of Completion of the degree (E)
6. Enter the Major Code for the degree; do not enter the name of the degree (F) – if the major code is not in the list, enter 9999
7. Enter the Institute Code where the degree was earned; do not enter the name of the institute (G) – if the institution where the degree was earned is not in the list, use 888888 for other US institution or 999999 for international institution

### 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:
- **PS 9.0 Major, Institute and License/Certification codes**

CHRS (PeopleSoft 9.2) Campuses, use the following:
- **CHRS PS 9.2 Major, Institute and License/Certification codes**

<table>
<thead>
<tr>
<th>Highest Level of Education:</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree Type:</td>
<td>Select</td>
</tr>
<tr>
<td>Terminal Degree for Discipline:</td>
<td>Yes</td>
</tr>
<tr>
<td>Date of Completion:</td>
<td></td>
</tr>
<tr>
<td>Major Code:</td>
<td></td>
</tr>
<tr>
<td>Institute Code:</td>
<td></td>
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<tr>
<td>License/Certification Code:</td>
<td></td>
</tr>
<tr>
<td>License/Certification Number:</td>
<td></td>
</tr>
<tr>
<td>License/Certification Expiry Date:</td>
<td></td>
</tr>
</tbody>
</table>
8. When applicable, enter the License or Certification Code for the candidate (H)
9. Enter the number of the license or certificate (I)
10. Enter the expiration date of the license or certification (J)

*Please note, if you enter a Major Code you must enter an Institute Code and vice versa. If you enter a License/Certification Code you must enter a License/Certification Number and vice versa.*
Enter the Onboarding information

The Employment Checks section is not used (A).

Before completing the Onboarding section, please review the Offer Card Guidance job aid.

16. Select the Offer Type (B)

17. Select the Pay Group (C); for AY faculty, this should be ACD; for 12-month faculty, this should be MST

18. Select SJ as the Offer Approval Type (D)

19. Select Base New Employee Data Form_V2020 as the Onboarding Form (E); Important: this is not required for current employees

20. Select SJ Onboarding Portal as the Onboarding Portal (F); Important: this is not required for current employees

21. Select the correct Onboarding workflow (G) Please note, this selection will start the I-9 process once the candidate accepts the offer in CHRS Recruiting; Important: this is not required for current employees

<table>
<thead>
<tr>
<th>PRE-EMPLOYMENT CHECKS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background Check:</td>
</tr>
<tr>
<td>Yes</td>
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<tr>
<td>Background Check Codes:</td>
</tr>
<tr>
<td>Select</td>
</tr>
<tr>
<td>Pre-placement physical:</td>
</tr>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ONBOARDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>OfferType:* Hire</td>
</tr>
<tr>
<td>Pay Group:* Academic Calendar (ACD)</td>
</tr>
<tr>
<td>Offer Approval Type:* SJ</td>
</tr>
<tr>
<td>Onboarding Form: Base New Employee Data Form_V2020</td>
</tr>
<tr>
<td>Onboarding Portal: SJ Onboarding Portal</td>
</tr>
<tr>
<td>Onboarding workflow: SJ-CFA PT Temp Onboarding Workflow</td>
</tr>
<tr>
<td>Reports To:* Carrie Medders</td>
</tr>
<tr>
<td>Email address: <a href="mailto:carrie.medders@sjsu.edu">carrie.medders@sjsu.edu</a></td>
</tr>
<tr>
<td>Onboarding Delegate 1: Julia Chan</td>
</tr>
<tr>
<td>Email address: <a href="mailto:julia.chan@sjsu.edu">julia.chan@sjsu.edu</a></td>
</tr>
<tr>
<td>Onboarding Delegate 2: Lisa Chen</td>
</tr>
<tr>
<td>Email address: <a href="mailto:lisa.x.chen@sjsu.edu">lisa.x.chen@sjsu.edu</a></td>
</tr>
<tr>
<td>Onboarding Delegate 3: Remie Bontrager</td>
</tr>
<tr>
<td>Email address: <a href="mailto:remie.bontrager@sjsu.edu">remie.bontrager@sjsu.edu</a></td>
</tr>
</tbody>
</table>
22. Verify the Reports To information and update if necessary (H); this person will be responsible for the onboarding of the employee

23. If someone else will manage the employee’s onboarding processes, enter them as the Onboarding delegate(s) (I, J, K)

*Please note, if you change the Reports To information it will not feed to PeopleSoft. You must submit a Position Management Action Form to update the position.*

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**Enter Verbal Offer information if desired**

24. The Verbal Offer information is optional but may be entered if you wish to track the information (A)

25. The date the candidate accepts or declines the offer will be updated by the system (B)
26. If you have the required transcripts for the candidate, you may click Add document to upload them here (A); they can be uploaded later if need be.

27. Click Merge document to create the offer letter (B)

You will be prompted to save the offer card; click OK (A)
The Document merge window opens

28. Scroll down to find SJ-San Jose (A)

Select the letter type

29. Open SJ-San Jose
30. Open SJ-Offer Letters
31. Open Faculty Offer Letter Templates
32. Select the letter you wish to use (A)
33. Click Merge (B)

Warnings of missing fields may appear

34. Review the Missing merge information (A); return to the offer card to correct if necessary
35. Select Ignore to move forward; missing fields can be updated manually on the letter (B)
You are returned to the offer card

36. The merged letter appears in the document list (A)
37. Click View to download and edit the letter (B)

View sample letters in the appendix.
Submit the offer card

38. The Offer Check section is not used (A)
39. Confirm that your name is in the Originator field (B)
40. The Approval process-Campus is not used (C)
41. Do not change the application status radio button (D)
42. The Provisioning section is not used (E)
43. Click Submit (F)

You will receive confirmation that your offer card has been saved

44. Scroll to the bottom of the window then click Save and Close to close the offer card.
Offer Letter Preparation, Approval and Signature; Background Checks
The offer letter is created in CHRS Recruiting and the approvals and signatures of the offer letter is handled outside of the CHRS Recruiting system. The final signed document will need to be uploaded back into CHRS Recruiting.

1. Edit the downloaded offer letter and forward to the appropriate individuals for approval. This process typically happens through DocuSign.
   a. Please note: For all Lecturer positions, you must include James Lee, Senior Director, Faculty Services, first in the approval process
2. Once the letter is approved, forward it to the candidate via DocuSign.
3. Move the candidate to the Background Check Initiated status in CHRS Recruiting. Refer to [Initiate and Manage Background Checks – Faculty](#) for guidance.
   a. Please note, certain positions require LiveScan fingerprinting.
4. Once the letter is signed and the background check is cleared, upload the signed offer in CHRS Recruiting, create the bulk compile file, and extend the final offer to the candidate via CHRS Recruiting
Upload the Signed Offer Letter and Prepare the Packet
The majority of this process is for all types of faculty recruitments. However, the preparation of the packet to send to Employee Support Services is relevant to part-time temp faculty only.

Navigate to the list of applicants and click on applicant name (A); this opens the Applicant Card

Click on Offer Incomplete (A)

The Offer Card displays

Scroll to the Offer documents section

1. Delete the original letter (A)
2. Click Add document to upload the signed offer letter (B)

Please note, if you did not upload transcripts when the offer was prepared, you should upload them now.
Upload the signed offer letter

3. Click Upload file to find the document (A)
4. Select Offer Letter – Non Confidential for the Document category (B)
5. Give the document a title if desired (C)
6. Click Save and close (D)

The new letter appears in the Offer documents section (A)

Save and Close the Offer Card

The next part will show you how to prepare the packet.

You are returned to the list of applicants – Open the Applicant Card for your candidate

7. Click the hyperlinked first or last name (A)
The Applicant Card is displayed

8. For some applicants you may see multiple jobs listed under the Applications tab; take action only on the job you are managing (A)

9. Click the ... menu to review the options (B)

Prepare the hiring packet

10. Click Compile and send (A)
If your applicant’s Letters of Recommendation were collected by the system (Letter of Recommendation (automatic)) proceed to step A1 below. If your applicant’s Letters of Recommendation were collected outside of the system and were uploaded manually (Letter of recommendation (manual)) proceed to step A2.

A1. Click on the following selections if the Letters of Recommendation were collected by the system:

1. Applicant personal details (A)
2. Profile (B)
3. Application form (C)
4. Additional form (D)
5. Completed online reference check form (E)
6. Cover Letter (F)
7. Letter of Recommendation (G)
8. Offer Letter – Non-confidential (H)
9. Resume (I) Omit if concurrent hire
10. Transcripts (J) Omit if concurrent hire
11. Click “Create PDF” (K) then proceed to p.26 – Compile Screen Displays
A2. Click on the following selections if you manually uploaded Letters of Recommendation:

1. Applicant personal details (A)
2. Profile (B)
3. Application form (C)
4. Additional form (D)
5. Cover Letter (E)
6. Letter of Recommendation (F)
7. Offer Letter – Non-confidential (G)
8. Resume (H) Omit if concurrent hire
9. Transcripts (I) Omit if concurrent hire
10. Click “Create PDF” (J)
**Compile Screen Displays**

You will see this screen appear and will compile the documents you requested. It may take several minutes to process.

*Note: On this screen, no action is needed*

**Download or Send Document Screen Displays**

At this screen, choose **No** for Send document (A).

Always download document to your local drive by clicking on Download Document (B).
Save As Screen will appear for download

11. Note the location of where you download the document
12. Your document is now ready for review

Please note: Review the compiled file in detail to ensure all documents are present. Delete any blank pages. If transcripts page(s) show with security restrictions, please review Appendix D to insert them manually into the compile file.

Return to the offer card

13. Click the offer on the applicant card (A)
14. You will be returned to the offer card
15. Scroll to the bottom of the card to submit the offer
Extend the Final Offer

Navigate to the list of applicants

1. Select Formal Offer Extended from the status list (A)
2. Click Next (B)

Move the candidate to the new status

- Assistant Professor - Steyer (497062)

Select

<table>
<thead>
<tr>
<th>Status</th>
<th>Applicant Nc</th>
<th>Pref Name</th>
<th>First name</th>
<th>Last name</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Application</td>
<td>40055</td>
<td>Tester</td>
<td>Testy</td>
<td></td>
</tr>
<tr>
<td>Phone/Video Interview Unsuccessful</td>
<td>39967</td>
<td>Adi</td>
<td>Alsaid</td>
<td></td>
</tr>
<tr>
<td>Prepare Offer and Upload Transcripts</td>
<td>40056</td>
<td>Christina</td>
<td>Son</td>
<td></td>
</tr>
</tbody>
</table>

Change application status

- Formal Offer Extended
- Formal Offer Accepted
- Offer Accepted Paperwork Received
- Formal Offer Declined
- Job Closing Communication
- Offer Rescinded
- Recruitment Cancelled
- Removed
- Applicant Withdrawn
- Incomplete
- Ineligible
- Submitted

Submit | Next | Cancel
Confirm the status change and notify the candidate

You will be prompted that the offer has not been approved (A). Since we are not doing offer approvals in the system, you may ignore this. You will also see a message reminding you that the candidate will be notified at this step (B).

1. Review the email and update if necessary (C)
2. Click Move Now (D)

Please note: If prompted to change the job status, do not change it. It should only be changed for tenure-track or FT Temp recruitments.

You are returned to the offer card. You can do a final review of all the data and update if needed.
Submit the offer card (A)

<table>
<thead>
<tr>
<th>Title</th>
<th>Size</th>
<th>Category</th>
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</thead>
<tbody>
<tr>
<td>Sjt-TT Faculty Offer Letter</td>
<td>347Kb</td>
<td>Offer Letter - Non Confidential</td>
</tr>
</tbody>
</table>

The application status has been updated (A)

<table>
<thead>
<tr>
<th>Submitted Status</th>
<th>Applicant Nr</th>
<th>Pref Name</th>
<th>First name</th>
<th>Last name</th>
</tr>
</thead>
<tbody>
<tr>
<td>[✓] Jun 25, 2020 Formal Offer Extended</td>
<td>40056</td>
<td>Sparty</td>
<td>Spartan</td>
<td></td>
</tr>
<tr>
<td>[✓] Jun 25, 2020 New Application</td>
<td>40055</td>
<td>Tester</td>
<td>Testy</td>
<td></td>
</tr>
<tr>
<td>[✓] Jun 21, 2020 Phone/Video Interview Unsuccessful</td>
<td>39967</td>
<td>Adi</td>
<td>Alsaid</td>
<td></td>
</tr>
<tr>
<td>[✓] Jun 21, 2020 Prepare Offer and Upload Transcripts</td>
<td>39968</td>
<td>Christina</td>
<td>Son</td>
<td></td>
</tr>
</tbody>
</table>
## Candidate View and Acceptance of Offer

The information in this section is what the candidate will see when they login to review and accept their offer.

### View the offer

1. The candidate will see a highlighted box with a link to view the offer (A)

### Accept the offer

2. The candidate sees a message letting them know they are required to view the letter to accept the offer (A)

3. The candidate clicks the link to download the offer letter (B)

4. The candidate must check that they agree to the terms of the offer (C)

5. The candidate must push the I AGREE button; it will display once the letter is downloaded AND the checkbox is checked (D)

Once they agree to the offer, if applicable, they will be prompted to complete the Base New Hire Data Form.
The application status is updated once the offer is accepted and the base form is completed. (A)

Please note, for current employees who do not complete the Base New Hire Data Form, this status will be updated when they accept the offer.

Integration process begins.

6. Let your college analyst that your applicant is ready for PS integration. This is when the Personal Data and POI data will be created for new employees or updated for returning employees.
APPENDIX A: Part-Time Temporary Sample Offer Letter
Dear APPLICANTFNAME APPLICANTLNAME,

On the recommendation of the Department/School of JOBDEPTPOSITION and on behalf of President Mary Papazian, I am pleased to offer you a temporary appointment to the faculty of San José State University. The specific terms and conditions of this appointment are as follows:

Appointment Period: (Update term information)
Effective Dates: OFFERSTARTDATE to OFFERENDDATE
Rank: (Update Position Title: ex Lecturer AY-A)
FTE: OFFERSUPPLEMENTARY_TEXT03
WTU: LEADINGHANDALLOWANCE
Faculty Fraction: ADDITIONALALLOWANCE2/ALLOWANCEFORCAR
Full-Time Base Salary: OFFERBASE
Actual Monthly Salary: ADDITIONALALLOWANCE1
Total Term Salary: SHIFTALLOWANCE (GENERIC_DURAPPOINTMENT_)

Please note: if you are appointed for the academic year, your pay for fall semester will issue on or around the beginning of: October, November, December, January, February and September. Your pay for spring semester will issue on or around the beginning of: March, April, May, June, July and August. If you are appointed for the fall semester only, your first paycheck will issue on or around October 1 and your last on or around March 1. If you are appointed for the spring semester only, your first paycheck will issue on or around March 1 and your last on or around August 1. You can find the complete Faculty Payment Schedule at http://www.sjsu.edu/up/calendars/index.html.

You may be eligible to enroll in CSU Health Plans no later than 60 days after the effective date of your appointment provided you are appointed for a minimum of one semester and have at least six (6) weighted teaching units (.40 FTE). If you are a Counselor or Librarian, you must be appointed for a minimum of six (6) months and one (1) day and have at least 7.5 weighted teaching units (.50 FTE). Please refer to the Faculty Benefits Summary at http://www.calstate.edu/hr/benefits/documents/cfa-unit-3-benefits-summary.pdf. You may contact your Benefits Services Representative at (408) 924-2250 for more information.

You will be represented by the California Faculty Association ("CFA"), a union of more than 28,000 professors, lecturers, librarians, counselors and coaches who teach in the California State University system. As stated by CFA, "In classrooms on the 23 CSU campuses, CFA members work hard to teach our students. To join as an active member with rights to vote and engage fully on behalf of yourself and others, go to: https://www.calfac.org/join-cfa."

This appointment is governed by the appropriate rules of the University, by the applicable Collective Bargaining Agreement and by the rules and regulations of the Trustees of the California State University. The University reserves the right to cancel or modify appointments based on department and student needs.

This appointment carries no guarantee of reappointment. An offer of reappointment can only be made in writing by the College Dean. No temporary appointment, whether part-time or full-time, can lead to tenure, but persons holding temporary appointments may be considered, if qualified, for probationary or additional temporary appointments, should such positions become available. All temporary
faculty are carefully evaluated in accordance with CBA Article 15 and University Policy S10-7 (http://www.sjsu.edu/senate/docs/S10-7.pdf). Contact your department/school/office of the Dean for details on the annual/cumulative evaluation process for temporary faculty.

Should there be any questions about these terms, please discuss the matter with your department chair/school director before indicating your acceptance. Your appointment is contingent upon your signing this statement of terms and conditions of employment and returning it to the office of the dean along with other pre-employment documents as well as completing a background check, as applicable, prior to the start date of your appointment.

Anticipating your acceptance of this offer, I wish you a most enjoyable term of appointment.

Sincerely,


Dean (or Dean Designee)
College Name

I hereby accept the terms and conditions of my appointment as stated above:

__________________________________________________                _________________
Signature                        Date

__________________________________________________
Print Name

C: James Lee, Senior Director/Faculty Affairs
Department Chair or School Director
APPENDIX B: Part-Time Temporary (COVID) Sample Offer Letter
CURRENTDATE

APPLICANTFNAME APPLICANTLNAME
APPLICANTSTREET1
APPLICANTSUBURB, APPLICANTSTATE APPLICANTPOSTCODE

Dear APPLICANTFNAME APPLICANTLNAME,

On the recommendation of the Department/School of JOBDEPTPOSITION and on behalf of President Mary Papazian, I am pleased to offer you a temporary appointment to the faculty of San José State University. The specific terms and conditions of this appointment are as follows:

Appointment Period: (Update term information)
Effective Dates: OFFERSTARTDATE to OFFERENDDATE
Rank: (Update Position Title: ex Lecturer AY-A)
FTE: OFFERSUPPLEMENTARY_TEXT03
WTU: LEADINGHANDALLOWANCE
Full-Time Base Salary: OFFERBASE
Actual Monthly Salary: ADDITIONALALLOWANCE1
Total Term Salary: SHIFTALLOWANCE (GENERIC_DURAPPOINTMENT_)

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This appointment carries no guarantee of reappointment. An offer of reappointment can only be made in writing by the College Dean. No temporary appointment, whether part-time or full-time, can lead to tenure, but persons holding temporary appointments may be considered, if qualified, for probationary or additional temporary appointments, should such positions become available. All temporary
faculty are carefully evaluated in accordance with CBA Article 15 and University Policy S10-7 (http://www.sjsu.edu/senate/docs/S10-7.pdf). Contact your department/school/office of the Dean for details on the annual/cumulative evaluation process for temporary faculty.

Should there be any questions about these terms, please discuss the matter with your department chair/school director before indicating your acceptance. Your appointment is contingent upon your signing this statement of terms and conditions of employment and returning it to the office of the dean along with other pre-employment documents as well as completing a background screen. Due to Covid-19, most federal, state and county courts are currently closed. As a result, our third party background screening provider may not be able to complete the background screen at this time. As a further condition to this offer, you are authorizing our third party background screening provider to complete its background check as necessary when the courts re-open and are further agreeing to execute, to the extent necessary, any documentation required in order to complete your background check upon the courts re-opening. Please note, that continued employment is contingent upon your successful completion of a background screening as required under CSU policy.

Anticipating your acceptance of this offer, I wish you a most enjoyable term of appointment.

Sincerely,

__________________________________________________
Dean (or Dean Designee)
College Name

I hereby accept the terms and conditions of my appointment as stated above:

__________________________________________________                _________________
Signature                 Date

__________________________________________________
Print Name

C: James Lee, Senior Director/Faculty Affairs ________________ (Initials)
Department Chair or School Director
Occasionally, you may come across a secure document that will not compile when you do the bulk compile function. The steps below show you how to manually download the document. The document can then be replaced in the bulk PDF file.

1. Open the downloaded PDF document and search for any secured documents.

2. When a document is secured, the Bulk Compile function will not be able to extract the information and you will see “Document contains security restrictions”. (A)
3. To separately download a secured document, click on the applicant name to open up the applicant card (A).

<table>
<thead>
<tr>
<th>Staff Test Job - Chen (497135)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

4. Click View to see the application and uploaded documents (A).

5. Locate the secured document and click on it to start downloading. Once the file is downloaded, you can add it to your bulk compile PDF.

<table>
<thead>
<tr>
<th>Certification / License 1 Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not answered</td>
</tr>
<tr>
<td>Please upload a copy your license/certification</td>
</tr>
<tr>
<td>Certificate secured.pdf (82kb)</td>
</tr>
</tbody>
</table>
APPENDIX D: Combining the Compile PDF with the PeopleSoft Appointment Form and Checklist

For Part-Time Faculty, you must add the temporary faculty checklist and the PeopleSoft Appointment form to the Compile PDF File. This is done once the following actions are complete:

- The Compile PDF file has been created
- The offer is accepted in the system
- The new employee data is in PeopleSoft
- The PeopleSoft Appointment Form has been generated

The PeopleSoft Appointment form and the Compile PDF file need to be combined before sending to Employee Support Services (ESS). Follow the steps below to combine the information.

1. Open the Compile PDF File in your PDF viewer (Acrobat, etc) and click on Organize Pages (A)

2. Insert the Checklist by clicking on Insert From File (A)

3. Insert the PS Appointment Form by clicking on Insert From File (A)
3. Locate where the checklist and the PS Appointment Form are saved and select Open. (A)

4. Insert the page after the first page then select OK.
5. The checklist and the PS Appointment Form will now show up in your Compile PDF File (A). Save.
Appendix E: Prepare the Offer (Special Sessions & Summer Sessions)

This section will walk through the process of preparing the offer for Special Sessions and Summer Sessions hires. While the process is similar, there are a few differences with how the data is entered. Once the offer is prepared, you can continue back to the main document beginning at Offer Letter Preparation, Approval and Signature; Background Checks, page 18.

Log into CHRS Recruiting

4. Navigate to one.SJSU
5. Search for or click the CHRS Recruiting tile
6. User your SJSUOne ID and password to log in

The Tiled Dashboard is Displayed

Please note, depending on your role the dashboard will look different.

3. From the tiled dashboard, click Jobs (A)

Select the Applications for the Job

4. Click the hyperlinked number (A) of applications for the job for which you wish to make an offer
The List Dashboard is Displayed

3. Change the View Total or to Approved Jobs by clicking the appropriate circle (A)
4. Click the hyperlinked number of applications next to the icon of the appropriate job (B)

Whether you navigate from the Tiled or List Dashboard, the list of applicants is displayed

2. Click the Status of the candidate for which you wish to extend an offer (A)

Move the Candidate to the Prepare Offer and Upload Transcripts status

7. Select the step in the status list (A)
8. Click Next (B)
<table>
<thead>
<tr>
<th>Confirm the status change</th>
<th>Offer details window opens: Verify the Personal Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. No communication will be sent to the candidate at this step (A)</td>
<td>45. Confirm the Address, Phone and Email information (A)</td>
</tr>
<tr>
<td>10. If applicable, open the Additional users section and prepare the email (B)</td>
<td>46. If the candidate is a current employee, enter their name in the Employee field (B). If the candidate is new or was a former SJSU employee (no longer active) do NOT enter their name here.</td>
</tr>
<tr>
<td>11. If prompted to change the job status, do not change the status; this is only changed for Tenure-Track or Full-Time Temp recruitments</td>
<td></td>
</tr>
<tr>
<td>12. Click Move now (D)</td>
<td></td>
</tr>
</tbody>
</table>
Verify the Job and Offer Details

47. Review the Job details (A)
48. Review the offer details (B)
49. Confirm the position information; if there are multiple positions in the recruitment, make sure the correct one is selected (C)

Please note: If the position you select is in a different classification or grade/rank than the original position, you may have to update the Salary Range/Grade in the Budget Details section.

<table>
<thead>
<tr>
<th>Job details</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSU Working Title:</td>
</tr>
<tr>
<td>Position Type:</td>
</tr>
<tr>
<td>Campus:</td>
</tr>
<tr>
<td>Division:</td>
</tr>
<tr>
<td>College/Program:</td>
</tr>
<tr>
<td>Department:</td>
</tr>
<tr>
<td>Time Basis:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Offer details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval status:</td>
</tr>
<tr>
<td>Recruiter:</td>
</tr>
<tr>
<td>Date entered:</td>
</tr>
<tr>
<td>Application source:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position no</td>
</tr>
<tr>
<td>Instr Fac,Summer Session-State</td>
</tr>
<tr>
<td>Position no: SJ-00006260</td>
</tr>
</tbody>
</table>

A. Teacher Ed Lecturer Pool - Summer Session
B. Pending
C. Internet - Alumni

Edit
Verify and update the Position Details

50. Verify the job code and hiring type (A)
51. Select No for Auxiliary Hire (B)
52. Select Temporary for Hiring Type (C)
53. Enter the Start date and the End date (D)
54. Verify the FTE, this is necessary for Special & Summer Sessions (E)
55. While the rest of the fields in this section are optional, you may verify the rest of the details.

Verify the Budget Details

3. Ensure the Pay Plan is selected (AY for most faculty; some may be 12-months, if Lump Sum, select Other) (A)
4. Verify the Salary Range/Grade (B) - if the position you chose was in a different range/grade, you are required to change this information to match. It is not uncommon to pull up a zero dollar range amount for min and max for Special & Summer Session positions.
Update the Salary and Compensation information

56. Enter the Base Pay Rate (A)
57. Select Lump Sum as the Unit basis if candidate will only be receiving one paycheck (B)

The rest can remain blank. While you are entering a Base Pay Rate, it will not show on the offer letter. If you are planning to offer relocation or other supplementary compensation, you may key those values here. They can also be added on the letter.

Please note, you do not need to enter or select anything in the Benefits Eligibility section.
Faculty/R03 Details

Please note: Unlike Temp faculty and Tenure/Tenure-track faculty, no details are needed in this section. However, you must make sure that FTE is filled in the Position Details section.

<table>
<thead>
<tr>
<th>FACULTY / R03 DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rank: Select</td>
</tr>
<tr>
<td>Service Credit: Select</td>
</tr>
<tr>
<td>Start Up Amount:</td>
</tr>
<tr>
<td>Duration of Start Up Funds:</td>
</tr>
<tr>
<td>Assigned/Release Time (in terms of WTU's):</td>
</tr>
<tr>
<td>Duration of Assigned/Released WTU:</td>
</tr>
<tr>
<td>Contingent annual salary:</td>
</tr>
<tr>
<td>Contingent pay rate:</td>
</tr>
<tr>
<td>Term:</td>
</tr>
<tr>
<td>Total Term Pay:</td>
</tr>
<tr>
<td>Duration of Appointment: Select</td>
</tr>
<tr>
<td>Weighted Teaching Units (WTU's):</td>
</tr>
<tr>
<td>Faculty Fraction Numerator:</td>
</tr>
<tr>
<td>Faculty Fraction Denominator:</td>
</tr>
</tbody>
</table>
### Enter the Education and License Information

11. Use the PS 9.0 Major, Institute and License/Certification codes file to complete this section (A).

12. Select the candidate’s Highest Level of Education (B).

13. Select the candidate’s Degree Type (C).

14. Select whether the candidate’s degree is the Terminal Degree for Discipline (D).

15. Enter the Date of Completion of the degree (E).

16. Enter the Major Code for the degree; do not enter the name of the degree (F) – if the major code is not in the list, enter in 9999.

17. Enter the Institute Code where the degree was earned; do not enter the name of the institute (G) – if the institution where the degree was earned is not in the list, use 888888 for other US institution or 999999 for international institution.
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>18. When applicable, enter the License or Certification Code for the candidate (H)</td>
<td></td>
</tr>
<tr>
<td>19. Enter the number of the license or certificate (I)</td>
<td></td>
</tr>
<tr>
<td>20. Enter the expiration date of the license or certification (J)</td>
<td></td>
</tr>
</tbody>
</table>

*Please note, if you enter a Major Code you must enter an Institute Code and vice versa. If you enter a License/Certification Code you must enter a License/Certification Number and vice versa.*
Enter the Onboarding information

The Pre-Employment Checks section can be left as defaulted (A).

Before completing the Onboarding section, please review the Offer Card Guidance job aid.

58. Select the Offer Type (B)
59. Select the Pay Group (C); for Lump Sum payment, this should be Positive Pay, for AY faculty, this should be ACD; for 12-month faculty, this should be MST
60. Select SJ as the Offer Approval Type (D)
61. Select Base New Employee Data Form_V2020 as the Onboarding Form (E); Important: this is not required for current employees
62. Select SJ Onboarding Portal as the Onboarding Portal (F); Important: this is not required for current employees
63. Select the correct Onboarding workflow (G) Please note, this selection will start the I-9 process once the candidate accepts
64. Verify the Reports To information and update if necessary (H); this person will be responsible for the onboarding of the employee.

65. If someone else will manage the employee’s onboarding processes, enter them as the Onboarding delegate(s) (I, J, K).

Please note, if you change the Reports To information it will not feed to PeopleSoft. You must submit a Position Management Action Form to update the position.

Enter Verbal Offer information if desired

66. The Verbal Offer information is optional but may be entered if you wish to track the information (A).

67. The date the candidate accepts or declines the offer will be updated by the system (B).
68. If you have the required transcripts for the candidate, you may click Add document to upload them here (A); they can be uploaded later if need be.

69. Click Merge document to create the offer letter (B)

You will be prompted to save the offer card; click OK (A)

To perform this action the offer card must first be saved.

Do you want to save the offer card now?

Cancel  OK
## The Document merge window opens

70. Scroll down to find SJ-San Jose (A)

## Select the letter type

71. Open SJ-San Jose
72. Open SJ-Offer Letters
73. Open Faculty Offer Letter Templates
74. Select the letter you wish to use (A) (For any Special Sessions, select SJ-Part-Time Faculty Offer Special Sessions)
75. Click Merge (B)

## Warnings of missing fields may appear

76. Review the Missing merge information, if any(A); return to the offer card to correct if necessary
77. Select Ignore to move forward; missing fields can be updated manually on the letter (B)
### You are returned to the offer card

78. The merged letter appears in the document list (A)
79. Click View to download and edit the letter (B)

#### Offer documents

Documents attached to the offer appear in the section below.

<table>
<thead>
<tr>
<th>Document</th>
<th>Date</th>
<th>Size</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sj-Part-Time Faculty Offer Special Sessions</td>
<td>Oct 11, 2021</td>
<td>136Kb</td>
<td>Offer Letter - Non Confident</td>
</tr>
</tbody>
</table>

**Document library:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
<th>Size</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concurrent_Ehire_I9_noBG_SSA1945.rtf</td>
<td>Sep 20, 2021</td>
<td>524Kb</td>
<td>View</td>
</tr>
<tr>
<td>Concurrent_Temp_noI9_BG_SSA1945.rtf</td>
<td>Sep 20, 2021</td>
<td>524Kb</td>
<td>View</td>
</tr>
<tr>
<td>Concurrent_Temp_noI9_noBG_SSA1945.rtf</td>
<td>Sep 20, 2021</td>
<td>522Kb</td>
<td>View</td>
</tr>
<tr>
<td>Demotion_noI9_BG.rtf</td>
<td>Sep 20, 2021</td>
<td>521Kb</td>
<td>View</td>
</tr>
<tr>
<td>Demotion_Prob_noI9_BG.rtf</td>
<td>Sep 20, 2021</td>
<td>522Kb</td>
<td>View</td>
</tr>
<tr>
<td>Emergency_I9_BG_SSA1945.rtf</td>
<td>Sep 20, 2021</td>
<td>526Kb</td>
<td>View</td>
</tr>
<tr>
<td>Emergency_I9_noBG_SSA1945.rtf</td>
<td>Sep 20, 2021</td>
<td>524Kb</td>
<td>View</td>
</tr>
<tr>
<td>Emergency_noI9_noBG_SSA1945.rtf</td>
<td>Sep 20, 2021</td>
<td>523Kb</td>
<td>View</td>
</tr>
</tbody>
</table>
Submit the offer card

80. The Offer Check section is not used (A)
81. Confirm that your name is in the Originator field (B)
82. The Approval process-Campus is not used (C)
83. Do not change the application status radio button (D)
84. The Provisioning section is not used (E)
85. Click Submit (F)

You will receive confirmation that your offer card has been saved

86. Scroll to the bottom of the window then click Save and Close to close the offer card.

Once the offer is prepared, you can continue back to the main document beginning at Offer Letter Preparation, Approval and Signature; Background Checks, page 18.