# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table of Contents</td>
<td>1</td>
</tr>
<tr>
<td>Introduction</td>
<td>2</td>
</tr>
<tr>
<td>General Process</td>
<td>2</td>
</tr>
<tr>
<td>PeopleSoft to CHRS Recruiting</td>
<td>2</td>
</tr>
<tr>
<td>CHRS Recruiting to PeopleSoft</td>
<td>2</td>
</tr>
<tr>
<td>Review Exception Report</td>
<td>3</td>
</tr>
<tr>
<td>Review &amp; Update Data in PeopleSoft</td>
<td>5</td>
</tr>
</tbody>
</table>
Introduction
The integration process is how data moves between CHRS Recruiting and PeopleSoft. Portions of the process are automated but the process to move new hire data into PeopleSoft requires intervention. This process includes an exception report, data review, and processes to move the data from the staging tables to the correct tables in PeopleSoft. For staff and MPP recruitments, this process will be managed by the Recruiters in University Personnel For faculty recruitments, this process will be managed by identified staff in the academic colleges and units across campus.

General Process

PeopleSoft to CHRS Recruiting
1. A job runs nightly to move data from PeopleSoft (SJSU @ Work) to CHRS Recruiting
   a. Active Position Data
   b. Active Employee Data (including student employees)
      i. Name
      ii. Campus Phone
      iii. Position Data
   c. Security Data
      i. Role
      ii. Primary Team
      iii. Secondary Team (if applicable)

CHRS Recruiting to PeopleSoft
1. A job runs nightly to move new hire data from CHRS Recruiting to PeopleSoft (SJSU @ Work)
   a. Changes to position data made in CHRS Recruiting will not be moved back into PeopleSoft
   b. All position data changes must be made in PeopleSoft
2. To move through the integration process, candidate must:
   a. Accept offer online
   b. Complete Base New Hire Employee Form
      i. If current employee, this form is not required BUT the employee must be connected to the Offer Card
3. Exception report in CHRS Recruiting run each day and emailed to department users & recruiters
   a. Candidate data won’t be sent to PeopleSoft if there is a data issue
   b. Missing data must be reviewed and corrected
   c. The nightly process will attempt to pull the data again
4. Data is reviewed in PeopleSoft and set to load
   a. Departments & Recruiters will set the Person and POI data to load
5. Process to load Person and POI data runs hourly throughout the day
6. Once processed the EmplID is available, and part-time temporary faculty contracts can be created; they do not have to be generated
7. Standard hiring documents are forwarded to Employee Support Services (ESS)
   a. ESS completes the integration steps for Job and Profile data and completes the hire
Review Exception Report

1. Report will be emailed each weekday morning from CHRS Recruiting.
2. Determine if there are any exceptions for your recruitment(s); the words PLEASE REVIEW will appear in fields that need review.
3. Correct issues, if applicable.

The images to the right show all the fields in the report.

Find Your Candidates

Use these fields to sort and filter the report to find your candidates:

- Division
- College/Program
- Department ID
- Department
- Administrative Support Email
- Job Initiator Email
- HR/Faculty Affairs Representative Email
- Requisition Number
- Applicant First/Last Name/Email

Data to Review

The words PLEASE REVIEW will appear in fields that need review.

If the Candidate Data needs review, you should contact the candidate to ensure they complete the necessary steps.

If the Offer Card data needs review, you will need to return to the Offer Card in CHRS Recruiting to update the applicable fields.

Candidate Data/Actions

- Offer Accepted – If the candidate has not yet accepted their online offer in CHRS Recruiting, their data cannot be moved forward.
- Employee Number OR Offer Form Complete – For new hires to the system, or rehires separated from the university, the Base New Employee Data Form is required. If it is not complete, their data cannot be moved forward. Current employees will not be required to complete this form.

Offer Card Values

- End date if applicable – If the job is temporary, there must be an end date.
- Faculty Fraction Numerator/Denominator/FTE – For part-time temporary faculty, the faculty fraction and FTE must be present on the offer card.
- Base Pay Rate – Base pay rate is required on all offer cards.
| | • **Unit Basis** – If the unit basis for the base pay rate is not identified, the data cannot be processed.  
| | • **Institute Code** – If a Major Code has been entered, the Institute Code must also be entered. If there is no Major Code, this field is optional.  
| | • **Major Code** – If an Institute Code has been entered, the Major Code must also be entered. If there is no Institute Code, this field is optional.  
| | • **License/Certification Name** – If a license or certificate number is entered on the Offer Card, this value must also be entered. If there is no number, this field is optional.  
| | • **Term** – Term is required for part-time temporary faculty.  
| | • **Weighted Teaching Units** – WTUs are required for part-time temporary faculty.  
| | • **Position Number** – The position to which you’re appointing the candidate must be selected on the offer card.  
| data. Depending on the values missing, you may need to issue a new offer to the candidate. |
Review & Update Data in PeopleSoft

Navigate to New Hire Review

1. Recruiting
2. CSU Recruiting Process
3. CSU Recruiting Inbound
4. New Hire Review

Create a New Run Control

1. Click Add a New Value
2. Your User ID populates
3. Enter a Search ID (A)
4. Enter the Business Unit: SJ000 (B)
5. Click Add

Please note, once the run control is created, you can search for it when you reach this page.

Complete or review the top of the run control page

1. The From and To Date are required and are based on hire date (A); the span of time can be
no more than 3 months
2. You must use at least one of the other criteria (B)
3. Once complete, click Find (C) to populate the results
4. Click Save to save this search criteria to be used again later.

Additional Criteria

**Last Name** – If you’re expecting a specific candidate, enter their last name.

**EmplID** – If you know the emplid of a current employee who is being hired, enter their ID.

**Last Updated By** – This field will only be used by University Personnel.

**Department** – To see the jobs in a specific department, enter the DeptID. Add additional rows to see multiple departments.

**Job Code** – To see only jobs in specific job codes, enter the job code(s).

**Union Code** – To only see jobs in certain unions, key the union information.

**CSU Unit** – To see results based on the check sort unit, key that information.

For faculty recruitments, the following search criteria is recommended:
- Department(s)
- Union Code = R03

Review the Results

The list of results will include those who have already been processed as well as those who are new. Narrowing down your search criteria will help reduce the size of the list.

Person Info Tab

**EmplID** – If the candidate is a current employee, or worked on campus within the last year, they should come across with an EmplID. Those with no EmplIDs are new hires. Please note, they may also be former students who never worked on campus or employees of auxiliary organizations.
### Search Match Result

- **No Employee ID Matched** – Based on the data entered, there was no match found for the EmpID.
- **Employee ID Matched** – Based on the data entered, a match was found. This will typically happen for someone who has person data in the system but never worked for SJSU.
- **EMPLID Matched-Name Changed** – This could happen if the candidate has data in the system but the name coming in from CHRS Recruiting is different. This should be closely reviewed to ensure a current employee’s primary name is not overridden.
- **No Search Match Needed** – This will typically appear for a current employee.

**First/Middle/Last Name** – This will be the name the candidate entered on the Base New Hire Data Form or the primary name already in the system for a current employee. If the Search Match Result was EMPLID MATCHED-Name Changed, check the employee’s name via CSU ID Search and modify to match the legal name. Many times what’s missing is the middle name or initial.

**Social Security Number** – If the candidate keyed this on the Base New Hire Data Form it will display. It will not display if the Employee ID matched. If you see 999999999, you will not be able to process the data. You must contact the candidate to get the correct SSN.

**Date of Birth** – If the candidate keyed this on the Base New Hire Data Form it will display. It will not display if the Employee ID matched.

**Citizenship (Proof 1/2)** – These fields will not be used as part of this process.

**Preferred First/Middle/Last Name** – If the candidate keyed this information on the Base New Hire Form, it will display. It will not display for current employees.

**Previous Name Used** – This field might populate for a current or former employee.

**Recuriter** – This field displays the name of the UP Recruiter.

**Campus ID** – This is the employee’s ID if they were connected on the Offer Card or if they keyed their ID on the Base New Hire Data Form. The 9-digit number may have 2 additional digits (80) added at the beginning. This number indicates that this employee is from SJSU.

**Campus ID Source** – Validated means that the system has validated the ID during the integration process. Self-reported means that the system has not validated the information.
Click the Process Status Tab

1. Candidates already processed will have boxes checked (A)
2. Candidates requiring process will have open boxes (B)
3. After the process runs to push the data to the regular tables, you may see a value of Failure (C); contact HRIS for guidance

Prepare to Process

1. Check the Load Person and POI Relationship boxes for those you wish to process (A)
2. Leave the boxes blank if you don’t wish to process the data (B)
3. Click Save

Please note, departments and recruiters will only set the Person and POI Relationship to be loaded. The Job and Profile boxes should remain unchecked. They will be managed by Employee Support Services.

When to Load Person and POI Data

New Employee
- Load Person and POI Data

Previous Employee w/break in service less than 1 year
- Load POI Data only

Previous Employee w/break in service 1 year or more
- Load Person and POI Data

Current Employee
- Neither Person nor POI Data need to be loaded
After the jobs run to load data, confirm that the information processed successfully

A-Those that processed will be checked and grayed out.
B-Those you did not select will still be open.
C-Those that failed will show Failure in the status on which it failed; contact HRIS if this happens.

Please note, the job to load data will be run Monday-Friday from 8:00 a.m. – 8:00 p.m.

Review the Person Data

Navigate to Modify a Person
1. Workforce Administration
2. Personal Information
3. Modify a Person

Review the Biographical Details
A-Primary/Legal Name
B-Date of Birth
C-Highest Education Level
D-Social Security Number
Review the Contact Information
A-Current Addresses
B-Phone Information
C-Email Addresses

Review the POI Data

Navigate to Maintain a Person’s POI Reltn
1. Personal Information
2. Organizational Relationships
3. Maintain a Person’s POI Reltn

Review the POI Data
A-A Future Hire record will be created.

B-Security Data – The Business Unit will be populated. Please note, going forward, the Department and Location Code will not be needed for New Hires.

C-POI History – An active and inactive row will be entered with a planned exit date. You may edit the planned exit date and the effective date for the inactive row if you choose.
| Please note, once the POI data has been created, the contract can be entered for part-time temporary faculty. |   |