Initiate Recruitments - Creating a Job Card

Introduction
Initiating recruitments in CHRS Recruiting involves completing the Job Card and submitting for approval and posting. This process will occur for all Full- and Part-time Staff and MPP positions. This guide will outline the steps to complete the Job Card, including which fields are required, which are optional, etc. For more details on what fields are required, see the Job Card Field Requirements job aid.

General Information
Recruiting for a New Position
It is helpful, but not necessary to have a position number in order to complete a Job Card.

Search Committee
It is helpful to have your search committee identified prior to completing the Job Card. If the information is keyed upfront it will save time later in the process.
If one of your search committee members is not a current Cal Poly Humboldt employee (faculty, staff or student), please contact your Recruiter as they will have to be set up in PeopleSoft then migrated to CHRS Recruiting in the overnight process.

Complete the Job Card

Log into CHRS Recruiting
1. Navigate to myHumboldt
2. From the Faculty / Staff Resources dropdown, select CHRS Recruiting (PageUp)
3. Select Humboldt from the Select Login Choice dropdown menu. Click Login.

The Dashboard is displayed
Please note, depending on your role the dashboard will look different. Two versions are shown here.

From the tiled dashboard, click New Job from the Jobs tile.

From the list dashboard, use the menu (shown in next step).
From your Dashboard, click the hamburger icon to open the main menu.

In the Jobs section, click New job.
Select a job template
1. Select the Team link (department) where the position resides (A)
2. Enter or search for the position number; remember, all position numbers begin with “HM-” (B); this is a required field
3. Select Humboldt from the Campus list (C); this is a required field even though it does not have an *
4. Select a Template if applicable (D)
5. Click Next

Please note, the Preview field (E) will only display if a template has been selected
Complete the Requisition Information
Numerous values will default from the selected position
1. Select the Recruitment Process (A); this is a required field
2. Select the Application Form (B); this is a required field even though it does not have an * by it
If any of the other information is incorrect you should stop the process; make sure you used the correct position number; if changes need to be made, have that done prior to beginning this process

Please note, the Requisition number will populate upon Submit. Leave this blank. (C)

A - Select the Recruitment Process
This is a required field. Humboldt has three (3) recruitment processes:
• HM-Faculty Temp Pool
• HM-Faculty Tenure Track
• HM-Staff

Please note, each process is similar but not exactly the same. Make sure you choose the correct process for your recruitment. HM-Staff also includes MPP recruitments.
B - Select the Application Form

This field is required even though it does not have an * by it. Humboldt has sixty-two (62) application forms prefaced by HM. If the specific job classification is listed, please use that. If the classification title is not listed, use HM-Staff Application for staff or MPP recruitments.

• HM-Staff Application

*Please note, each application is similar but not exactly the same. Make sure you choose the correct application form for your recruitment.*

Enter the Position details:
1. Enter the job code in the Job Code/Employee Classification field. If you are unsure of the job code, use the search tool on the right.
2. To enter the salary range in the Salary Range field use the search tool and enter the job code in the number field. This will pull up ranges to select from.
3. Enter the working title for the position.
4. Select Humboldt as the campus if it is not already entered.
5. Select the appropriate division from the dropdown menu.
6. Select the college/program from the dropdown menu.
7. Select the Department from the dropdown menu.
Enter the Position(s) you wish to recruit for
1. The position number is an optional field. However, completing the position number field may speed the recruitment and hiring process along. The position number is prefaced by HM- (example: HM-00022205)
2. Select New or Replacement
3. Use the New or Replacement boxes to add more than one position

Please note:
• Most Staff/MPP recruitments will only have one position associated with them.

Enter the Requisition Details
1. Select No for Auxiliary Recruitment
2. Select the Reason for opening the recruitment
3. Enter the Justification for Position
4. Entering the Previous/Current Incumbent is optional
5. Select the Work Type
6. Select the Hiring Type
7. Verify the Job Status; change if necessary
8. Verify the Time Basis; change if necessary
9. Verify the FTE and ensure it has two decimal places (1.00)
10. Verify the Hours per week
11. Enter the FLSA Status if you know it
12. Select Cal Poly Humboldt for CSU Campus (Integration for 3rd Party Solutions); this is used for integration and is required

Please note, the FTE and Hours fields are not connected. Make sure both are correct. The FTE and Hours per week do not need to be changed for part-time temporary faculty. The WTU and fraction will be entered during the offer process.
<table>
<thead>
<tr>
<th>2 – Select the reason from the list of available options</th>
<th>![Reason Selection]</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 – Select the work type from the list of available options</td>
<td>![Work Type Selection]</td>
</tr>
</tbody>
</table>

*Please note, only the following work types will be used for staff recruitments:*
- Management (MPP)
- Staff

| 6 – Select the hiring type from the list of available options | ![Hiring Type Selection] |

*Please note, At-Will should only be used for MPPs.*

| 7 – Select the job status from the list of available options | ![Job Status Selection] |

*Please note, Emergency hire will not be used.*
The Job Details section can be left blank

Complete the Job Duties Section
1. The duties/responsibilities section is not required
2. Indicate whether or not this position will supervise employees; this is required
3. It is optional to enter the position titles supervised by this position

*Please note, only select Yes if the position supervises Faculty, Staff or MPP employees; not students.*
**Complete the Position Designation information**
1. Select the General Mandated Reporter Type
2. Select None for Conflict of Interest
3. If applicable (Athletics), select NCAA
4. All other fields are not used

**1 – Select the Mandated Reporter Type**
*Please note, this information will be reviewed by the faculty or staff recruiter and updated if necessary.*

**2 – Select None for Conflict of Interest**
*Please note, this information will be reviewed by the faculty or staff recruiter and forwarded to the Conflict of Interest Officer for review if necessary.*

**Complete the Budget Details information**
All fields in this section are optional. However, completing the noted fields may speed the recruitment and hiring process along.
1. Provide an Anticipated Hiring Range (primarily staff positions)
2. Provide the chartfield/account string information.
3. Select the Pay Plan
4. For 10/12 and 11/12 pay plans, enter the Months Off
Please note, there is no benefits functionality in this system. All benefits processes for Cal Poly Humboldt are handled in PeopleSoft.

**Complete the Posting Details Information**
1. Select the Posting Type
2. Enter the Date fields if appropriate; the Anticipated End Date is required for temporary positions
3. Select the Posting Location
4. Do not check the advertising sources boxes.
5. Enter Additional Advertising Sources
6. Enter the Advertising summary
7. Complete the Advertisement text (vacancy announcement) section as indicated in the screen shot

---

**1 – Select the Posting Type**
- Direct appointment will not be used
- Select Internal recruitment if you wish for your job to only be posted to current Cal Poly Humboldt employees only
- Select Open recruitment to post your job to the public; Cal Poly Humboldt employees will also be able to see the posting

**2 – Enter the Applicable Dates**

- **Review Begin Date**
  - Staff/MPP Recruitments – This value will be entered by the Recruiter

- **Anticipated Start Date**
  - Staff/MPP Recruitments – This value should not be entered

- **Anticipated End Date**
  - All Temporary Recruitments – This date must be entered
3 – Select the Posting Location

<table>
<thead>
<tr>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central California</td>
</tr>
<tr>
<td>Fresno</td>
</tr>
<tr>
<td>Monterey Bay</td>
</tr>
<tr>
<td>San Luis Obispo</td>
</tr>
<tr>
<td>San Luis Obispo - Downtown</td>
</tr>
<tr>
<td>San Luis Obispo - Swanton Pacific Ranch</td>
</tr>
<tr>
<td>Stanislaus - Stockton</td>
</tr>
<tr>
<td>Stanislaus - Turlock</td>
</tr>
<tr>
<td>Northern California</td>
</tr>
<tr>
<td>Chico</td>
</tr>
<tr>
<td>Bakersfield</td>
</tr>
<tr>
<td>Humboldt</td>
</tr>
<tr>
<td>Monterey Bay</td>
</tr>
<tr>
<td>Sacramento</td>
</tr>
<tr>
<td>San Diego</td>
</tr>
<tr>
<td>San Jose</td>
</tr>
<tr>
<td>San Jose - Most Landing Marine Lab</td>
</tr>
</tbody>
</table>

Additional Advertising Information

All faculty and staff recruitments will be posted on the standard advertising sites, including CSU Careers, Inside Higher Ed, Caljobs and Chronicle of Higher Ed. You do not need to check the boxes.

The Advertising summary (6):
- Please enter an abbreviated advertising summary for the position here.

The Advertisement text (7):
- Please complete the necessary fields in the vacancy announcement template.

Complete the Search Details information

1. Enter or Select the Search Committee Chair
2. Add Search Committee Members

Please note, while this information is not required at this time, entering it up front makes the recruitment process flow more smoothly. The initiator of the Job Card may update this information after the Job Card has been submitted for approval. It must be entered prior to the routing of applications.
1 – Select the Search Committee Chair
1. Enter the First and Last name of the individual who will chair your committee (A)
2. Click Search
3. Highlight the name of the person (B) – the User information will appear below
4. Click Okay (C)

Please note, searching for the primary or legal name will make your search more efficient.

2 – Select the Search Committee Members
You may search by name or Team (DeptID).
1. Enter the applicable search criteria (name or Team)
2. Click Search
3. Highlight the person’s name to display their information at the bottom of the screen
4. Click Add on their row
5. Continue searching and adding names until all are added
6. Click Done once all names are added

Selection Criteria
This section can be left blank. Recruitment team will complete.
Complete the Users and Approvals information
1. Verify the Reports to Supervisor Name (defaults from Position Data); update if necessary
2. Enter the name of the employee who will manage the recruitment
3. Do not complete Compliance Panel Facilitator
4. Add additional viewers if applicable

*Please note, if the Reports to Supervisor Name is incorrect or blank you may update it here to complete your Job Card, but you must also update the position in PeopleSoft.*

Continue completing the Users and Approvals information
1. The Hiring Administrator defaults to your name; change it, if applicable, to the Appropriate Administrator (MPP) for the position
2. Select the Approval process. This will be one of the following for staff recruitments:
   - HM-Staff/MPP
   - HM-Staff Approval Academic Affairs
   - HM-Staff Approval Enrollment Mgmt
3. Verify the approval information to confirm you’ve selected the correct process; you may need to scroll to see all values

*Please note, the Hiring Administrator and the Reports to Supervisor may be the same person.*

Set the Recruitment Status to Pending Approval

*Please note, not all users can see the Recruitment Status field. It is displayed based on the role you are in.*
### Navigate to the Documents page
1. Select Document from a file

### Upload the File
2. Click Upload file and select the file you wish to upload
3. Change the Document category to Recruitment Documents
4. Give your file a Title
5. Click Save and add another to attach additional documents OR click Save and close

*Please note, ALL documents uploaded must be in the Recruitment Documents category. Do NOT select Position Description.*

### Required Documents
- **Staff & MPP Recruitments – New & Existing Position**
  - Attach the position description and organization chart

### Save or Submit
Whether you save a draft or submit the Job Card for approval, a requisition number will be assigned.

- **Save a draft**
  - Clicking save a draft will save your progress with one exception. If you already selected an Approval Process it will not be saved in a draft state. When you return to the Job Card you must select it again.

- **Submit**
  - Clicking submit will save and submit the document for approval. The Job Card will remain open.

- **Submit & Exit**
  - Clicking submit & exit will save and submit the document for approval. It will also close the Job Card.

### Job Card Approval
When the Job Card is submitted, an email notification will be sent to the first approver. After each person approves a notice will be sent to the next approver. If anyone in the approval chain declines, a notification will be sent to the person who initiated the recruitment, the hiring manager and the recruiter.

### After Approval
- **Staff/MPP Recruitments**
  - The Job Card will be reviewed and updated if necessary. The Recruiter will add the Screening Criteria then post the job.

*Please note, once the Recruiter posts the job, it make take 15-20 minutes for it to appear on the career portals.*