

Approval Processes

Revision history

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Introduction

This guide shows you how to work with approval processes. CHRS Recruiting system includes many approval processes that are developed by campuses. Approvals are all similar. What you learn in this guide applies to all CHRS Recruiting approval processes.

These processes are based on generic approval processes that each campus uses as a starting point and then customizes for its own users.

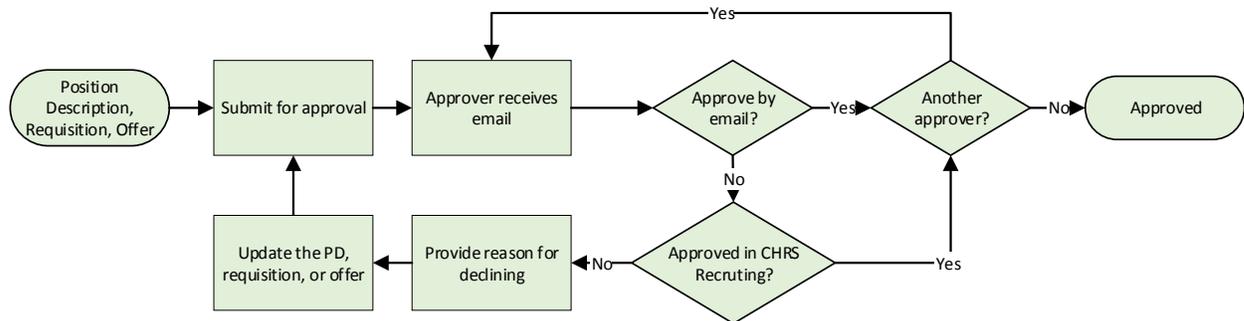
Approval processes are linear; each approver receives a request for approval after the previous approver has approved.

The following items have approval processes:

- Position descriptions
- Job requisitions
- Offers

Process diagram

Each campus provides its own approval process. The following diagram shows a generic approval process.



- The requester submits the position description, job requisition, or offer for approval.
- The reviewer receives an email, and chooses whether to approve by email or through the CHRS Recruiting system.
 - If the reviewer chooses email, then the reviewer approves.
 - If the reviewer chooses to go into CHRS Recruiting, the reviewer can approve or decline.
- If approved, the process moves to the next approver in the process (if there is one) or to the end.

- If declined:
 - The approver provides a reason.
 - The approval process ends.
 - The position description, job requisition, or offer is updated and resubmitted for approval

What you will do

- Select an approval process
- Complete an approval
- Check approval status
- Replace an approver
- Restart an approval process

Definitions

Term	Definition
approval	Position descriptions and requisitions both have approval processes. These processes are specified by each campus. If you open a requisition from an approved position description, you must still go through the requisition approval process.
job card (requisition)	<p>The job card initiates a requisition with specific and relevant details of the job, posting language and requirements, and includes an approval process with notifications and alerts to approvers. With a unique ID to represent each requisition, it facilitates central information collection and tracking. The job card also associates users to the requisition by their roles in the recruitment process, such as the Hiring Manager, HR/FA Representative (Recruiter), Search Committee Chair and other key team members.</p> <p>A common job card is shared for the CSU system. However, each campus can specify which fields to display on the New Job page.</p> <p>Job card is sometimes used to refer to the New Job page or the Requisition Information form.</p>
offer card	A form that is used for creating the official offer to the applicant. A common offer card is shared across the CSU system. However, each campus can specify which fields to display on their offer card. The offer card requires an approval process.
position description	<p>A Position Description (also known as a job description) summarizes the specifications and duties of a position. It outlines the essential and marginal functions of a position, and describes the physical, mental and environmental demands of the position.</p> <p>A common Position Description template is shared for the CSU system. However, each campus can specify which fields to display on the position description, in compliance with the CSU Position Description policy.</p> <p>Position Description function requires an approval process. You can create a requisition from an approved position description.</p>

Select an approval process

Approval processes are specified by your campus. In some instances, the approval process is predetermined by the job template or position number. In other instances you must select an approval process from a list.

When to select an approval process

- You are finished creating a position description and it must be approved before you can recruit for the position.
- You are finished creating a job requisition and it must be approved before you can post it.
- You are finished creating a job offer and it must be approved before it can be made.
- The approval process has not been predetermined.

Prerequisites and assumptions

- You know which approval process is appropriate for the current situation.
- You have completed the rest of the form.

How to select an approval process

Regardless of which type of item you need to have approved, approval process selection is the same.

1. Scroll down to the Users and Approvals section.
2. From the **Approval Process**:* menu, select the appropriate approval process.

Numbers in the graphic refer to the steps in the procedure.

3. Use the Magnifying glass search fields to select the user for each role.
4. If the approval process is long, scroll down through all approval steps.
5. Ensure that all approval steps have a user assigned.
6. Click **Submit** or **Save as Draft** if you are not ready to submit for approval.

What if no approval process is available?

If your approval process menu shows **None**, then you need to specify more information before you can select an approval process, or you do not have the appropriate permission access to identify the approval process for this specific area.



The image shows a form field with the label "Approval process:*". To the right of the field is a dropdown menu with "None" selected. Below the dropdown is a blue button labeled "None" with a mouse cursor pointing to it.

On each form, the approval process menu depends on another field value. If that field is blank, the **Approval process:*** menu is inaccessible.

Form	Field value required to access approval processes
Position description	*Campus:* from the campus hierarchy
Offer card	Offer approval type:* in the Onboarding section
Job requisition	*Campus on the Select a job template page

What happens next

- When you click Submit, the first approver receives an email notification.
- Some approvers might see notifications on their dashboards about jobs or offers awaiting their approval.

Related documents

[Job approvals](#)

[Position descriptions](#)

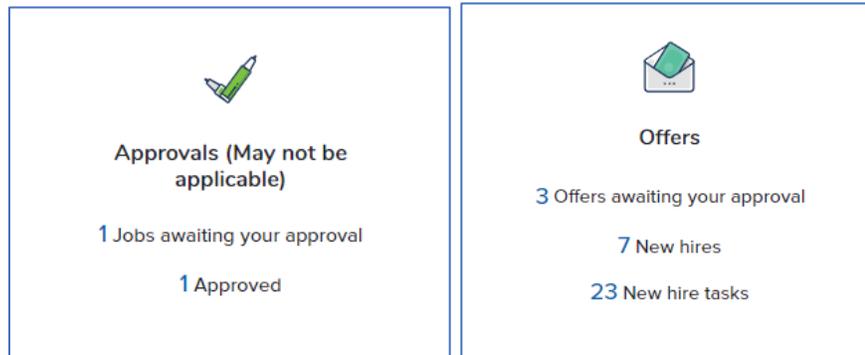
[Offer approvals](#)

Complete an approval

If you are an approver for a position description, job requisition, or offer, you need to be able to complete your step in the process.

When to complete an approval

- You receive an email notification to approve a form.
- You see a notification on your dashboard that a form is awaiting your approval.



Prerequisites and assumptions

- You have approver permission assigned to you.
- You are identified as an approver on a position description, job requisition, or offer.
- If you are approving by email, then you have already reviewed the information that you are approving.

How to approve by email

You receive an email from the system indicating that you are an approver for something. For example, the message might read:

*"A position description **Custodian** - Position Description Number: **155** has been allocated to you for approval."*

To approve by email, use the following procedure:

1. Reply to the email.
2. Type **Approve** in the body of the email.
3. Send the email.

Guidelines

- Do not attempt to decline through email. Only approval is permitted.
- The word "Approve" (without quotes) is the only valid response. Although capitalization does not matter, avoid adding anything to it, such as "Approved," "I approve," "agree," "yes," "go for it."

How to complete a job approval in CHRS Recruiting

Use the following procedure to complete an approval for job requisitions and position descriptions.

1. Click the following links to open the approval based on your role.

Your role	Dashboard links
Hiring manager or other approver	<p>From the dashboard:</p> <div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 10px; width: 45%; text-align: center;">  <p>Approvals (May not be applicable)</p> <p>1 Jobs awaiting your approval</p> <p>1 Approved</p> </div> <div style="border: 1px solid #ccc; padding: 10px; width: 45%; text-align: center;">  <p>Offers</p> <p>3 Offers awaiting your approval</p> <p>7 New hires</p> <p>23 New hire tasks</p> </div> </div>
Recruiter, manager, or administrator	<p>Manager Activities</p> <ul style="list-style-type: none"> 3 Jobs requiring panel review 1 Offers awaiting your approval 4 New hires 4 New hire tasks

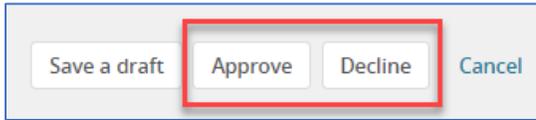
2. On the **Manage approvals** page, click **View** next to the item that needs approval.

Manage approvals

Approval status: Pending Clear Search

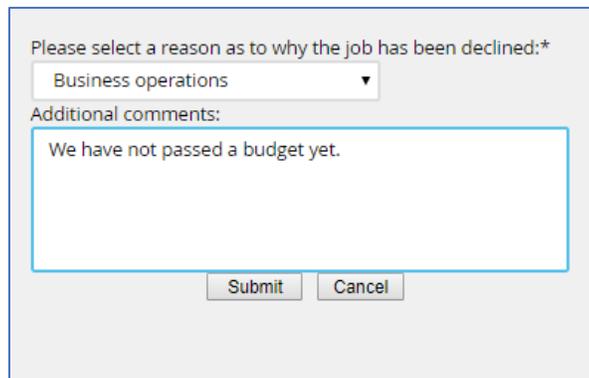
Date raised	Job No.	PD No.	Job title ▲	Hiring Administrator	New	Replacement	
7 Feb 2019	492798		Undercover Locksmith	Jewell...	0	0	View

- Review the job requisition and then click a response:



A screenshot of a web interface for job requisition approval. It features four buttons: 'Save a draft', 'Approve', 'Decline', and 'Cancel'. The 'Approve' and 'Decline' buttons are enclosed in a red rectangular box, indicating they are the focus of the instruction.

- **Approve:** The page closes and the next approver receives notification. If you are the final approver, then the job creator receives notice that the job has been approved.
- **Decline:** You must specify a reason for declining the job, then click **Submit**.



A screenshot of a form for declining a job requisition. At the top, it says 'Please select a reason as to why the job has been declined:*'. Below this is a dropdown menu with 'Business operations' selected. Underneath is a text area labeled 'Additional comments:' containing the text 'We have not passed a budget yet.'. At the bottom of the form are two buttons: 'Submit' and 'Cancel'.

Offer approvals

Offer approvals differ slightly from requisitions and position descriptions:

- Offers are not approved through email.
- Offers are not displayed on the Manage Approvals page.
- When you decline Offers, you must provide an explanation instead of a selectable reason.

How to complete an offer approval

- In CHRS Recruiting, open the side menu.
- Click **Offers**.
- Click **View** for the applicable offer.
- Review the offer.
- At the bottom of the page, click the response:
 - **Approve:** The page closes and the next approver receives notification. If you are the final approver, then the job creator receives notice that the job has been approved.
 - **Decline:** Provide an explanation for your decision to decline, then click **Submit**. The requester of the offer receives an email notification that includes the decision and the explanation.

What happens next

- Approved items await the next approver in the process.
- If you were the final approver, the approval status changes to Approved.
- If you declined the approval, the approval process stops. The requester can update the item and then resubmit for approval.

Related documents

[Job approvals](#)

[Position descriptions](#)

[Offer approvals](#)

Check the approval status

After you send an item out for approval, you might want to check back to see whether the approval process is progressing. Sometimes, the approval process halts because an approver is absent or unable to perform reviews.

You can search for items by their approval status.

- Approved
- Declined
- Pending approval

When to check the approval status

You can check the approval status any time after the approval process starts.

Prerequisites and assumptions

You submitted an item for approval.

How to find a job that is pending approval

1. From the top navigation bar, open the Jobs page.



2. In the Status field, select **Pending Approval**.

 A search filter form with a light gray background. It contains:

- A 'Status' dropdown menu with 'Pending approval' selected and highlighted by a red box.
- A 'Clear' button and a 'Search' button to the right of the status dropdown.
- A 'Types:' dropdown menu with 'All' selected.
- A link with a plus icon and the text 'Show other search criteria' below the types dropdown.

3. Click **Search**.

How to find a position description that is pending approval.

1. From the side menu, click **Manage position descriptions**.
2. In the **Approval status** field, select Pending Approval.

 A search form titled 'Position Description' with a light gray background. It contains several input fields:

- PD No. (text input)
- Working title (text input)
- Position Number (text input)
- *Division (dropdown menu with 'All' selected)
- Sub department (dropdown menu with 'All' selected)
- Approval status (dropdown menu with 'Pending approval' selected and highlighted by a red box)

3. Click **Search**.

How to check the approval status of a position description or job requisition

1. Open the position or requisition.
2. Scroll down to the Users and Approvers section.
3. Review the approval process information. You can quickly see where you are in the process.

Approval process:*	SL - Staff - New PD - Edits
1. Reports-to Manager:	John Smith ✓ Approved 14 Sep 2018
2. Human Resources:	Jane Smith 🕒 You are here 
	Resend email to approver

How to open an offer that is pending approval

1. Open the job requisition.
2. From the top navigation area, click **View applications**.



3. Find the applicant and then click **View application**. The applicant card opens.
4. Click the **Offer incomplete** link in the Applications area. The offer opens.

Applications			
Adventure Locksmith	Prepare offer	Offer incomplete	Actions ▾
#492779 JR Submitted: 29 Jan 2019 via LinkedIn	Status changed 6 Feb 2019		Flags Form Resume / CV

How to check the approval status of an offer

1. Open the offer.
2. Scroll down to the **Approval process** section.
3. Review the approval process information. You can quickly see where you are in the process.

Approval process - Campus	
Originator:*	Jonathan Fales
Approval process - Campus:	SB - Offer Approval - Three Step Approval
Approval workflow initiated: 7 Feb 2019, 4:46pm PST	
1. Hiring Manager:	 BHM Permission 🕒 You are here
2. Human Resources Manager:	BHMT Permission
3. Human Resources Manager:	BHM Permission

What happens next

- If the approval process is delayed you can contact the approver to expedite the process.
- If the approver is unable to complete the task, you can request an approver replacement.

Related documents

[Job approvals](#)

[Position descriptions](#)

[Offer approvals](#)

Replace an approver

If the approver is unavailable or unable to perform the approval function, you need to reassign the approval step. However, after you submit an item for approval, that item becomes read-only, so you cannot edit the approval process.

When to replace an approver

When the original approver is unable to perform the approval function.

Prerequisites and assumptions

An item is awaiting approval.

How to replace an approver

Users are unable to edit items that are in an approval process.

1. Contact your campus administrator.
2. Provide the name of the alternate approver.

What happens next

- The campus administrator replaces the approver.
- The original approver receives an email that cancels the approval request.
- The new approver receives an email indicating that an item is awaiting approval.

Related documents

[Job approvals](#)

[Position descriptions](#)

[Offer approvals](#)

Restart an approval process

If an approval is declined, the approval process ends, so you can edit the form. After you address the concerns of the approver, you can restart the approval process.

When to restart an approval

- When the approval is declined.
- You have addressed the concerns of the approver.

Prerequisites and assumptions

- You have permission to edit the approval.

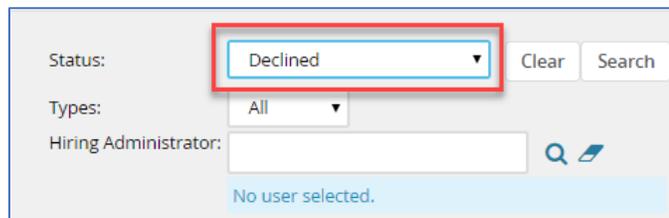
How to find a declined job

You might need to search for a job that needs to be approved. You can use the approval status field to narrow the search.

1. From the top navigation bar, open the Jobs page.



2. In the Status field, select **Declined**.

A search filter interface with a light gray background. It contains three rows of filters: 'Status:' with a dropdown menu showing 'Declined' (highlighted with a red box), 'Types:' with a dropdown menu showing 'All', and 'Hiring Administrator:' with a text input field containing 'No user selected.' To the right of the filters are 'Clear' and 'Search' buttons. A magnifying glass icon and a pencil icon are also present.

3. If you know the hiring administrator, enter that information to further narrow the search.
4. Click **Search**. The search returns jobs that have been declined.

How to restart the approval

1. Open the job.
2. Scroll down to the **Users and Approvals** section.
3. Read the reason that the job was declined.

4. Click **restart**.

The screenshot shows a hiring approval process interface. At the top, it displays 'Hiring Administrator:* Jonathan Hiring' and 'Approval process:* 1 Approver'. Below this, a table lists the approval steps. The first step, '1. 1: BHM Permission', is marked as 'Declined 8 Feb 2019' with a red 'X' icon. The reason for declining is 'Budget concerns'. A 'restart' button is located at the bottom right of the interface.

Hiring Administrator:*	Jonathan Hiring
Approval process:*	1 Approver
1. 1:	BHM Permission ✘ Declined 8 Feb 2019
Reason for declining the job: Budget concerns	

restart

What happens next

The review process restarts.

Related documents

[Job approvals](#)

[Position descriptions](#)

[Offer approvals](#)