

Approval Processes

Revision history

Last modified on	Author	Reason
3/11/2019	CHRS Recruiting Training Team	Campus update
1/30/2022	SDSU HR	SDSU Update

Introduction

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

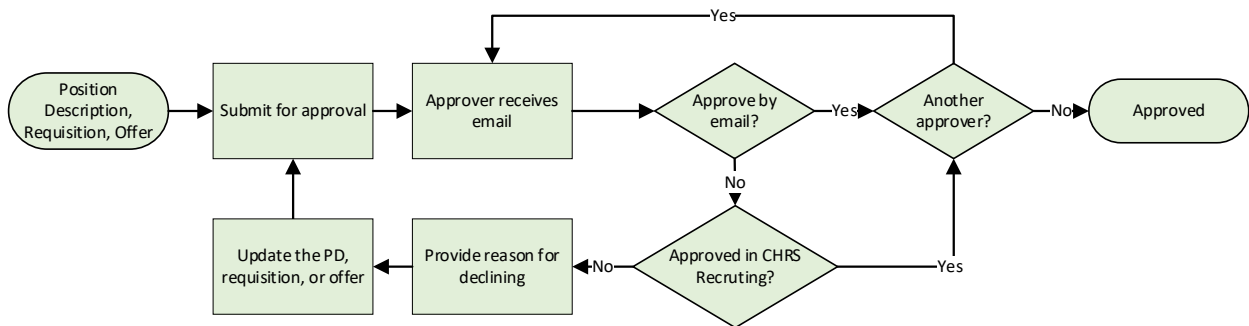
Approval processes are linear; each approver receives a request for approval after the previous approver has approved.

The following items have approval processes:

- Job requisitions
- Offers

Process diagram

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



- The requester submits the 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 CHRS 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 CHRS system. However, each campus can specify which fields to display on their offer card. The offer card requires an approval process.

Select an approval process

Approval processes are specific to your division or department. You must select an approval process from a list.

When to select an approval process

- 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.

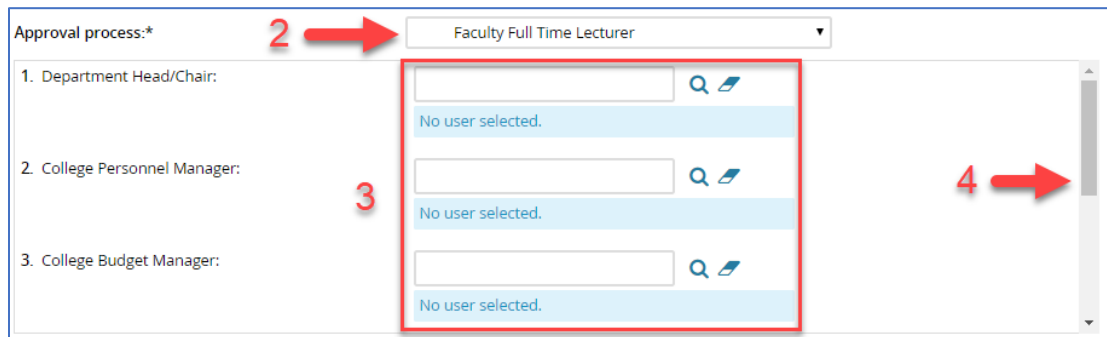
Prerequisites and assumptions

- 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.

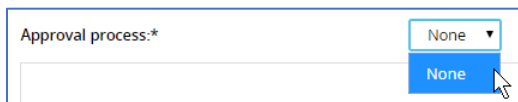
1. Scroll down to the Users and Approvals section.



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.



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](#)

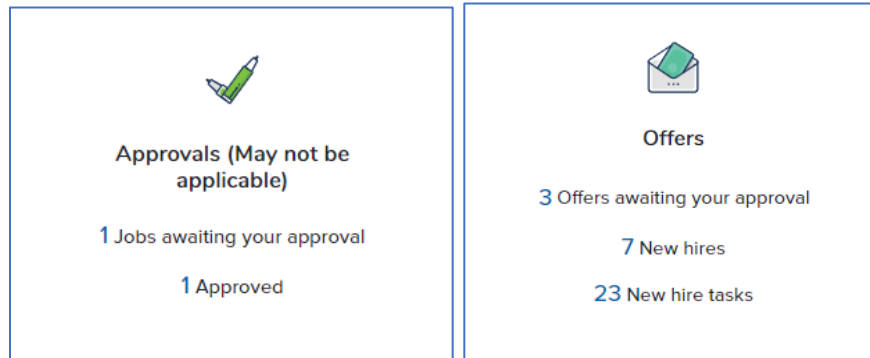
[Offer approvals](#)

Complete an approval

If you are an approver for a 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.



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:

- Reply to the email.
- Type **Approve** in the body of the email.
- 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.

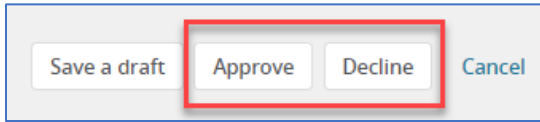
1. Click the following links to open the approval based on your role.

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	<div style="border: 1px solid #ccc; padding: 10px;"> <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 </div>

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



- **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.

A screenshot of a form for declining a job. It features a dropdown menu with 'Business operations' selected, a text area containing 'We have not passed a budget yet.', and 'Submit' and 'Cancel' buttons at the bottom.

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

1. In CHRS Recruiting, open the side menu.
2. Click **Offers**.
3. Click **View** for the applicable offer.
4. Review the offer.
5. 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](#)

[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

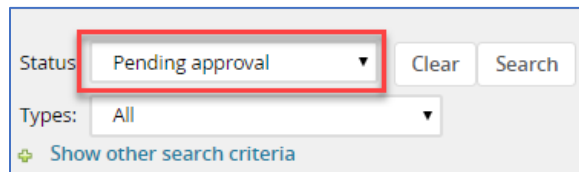
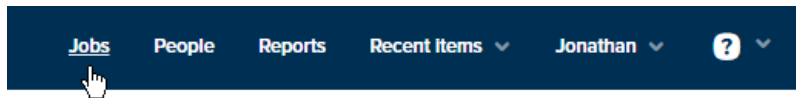
When to check the approval status

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

Prerequisites and assumptions

You submitted an item for approval.

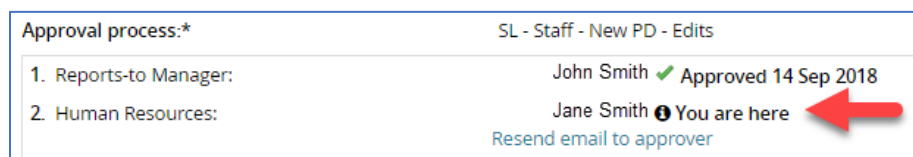
How to find a job that is pending approval



3. Click **Search**.

How to check the approval status of a job requisition

1. Open the requisition.
2. Scroll down to the Users and Approvers section.

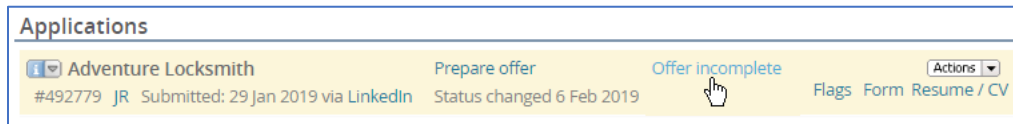


How to open an offer that is pending approval

1. Open the job requisition.

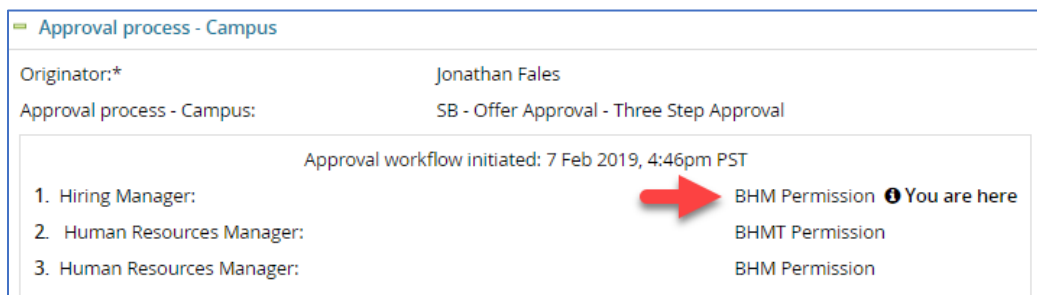


3. Find the applicant and then click **View application**. The applicant card opens.



How to check the approval status of an offer

1. Open the offer.
2. Scroll down to the **Approval process** section.



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](#)

[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 HR recruiter.
2. Provide the name of the alternate approver.

What happens next

- The HR recruiter 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](#)

[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

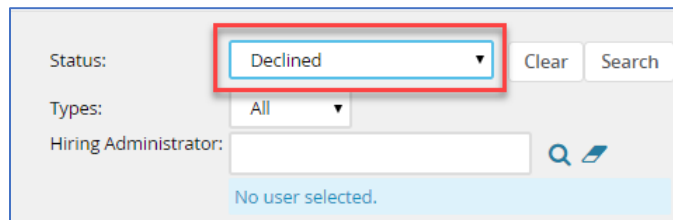
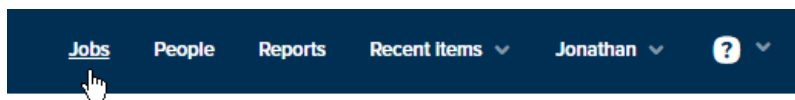
- When the approval is declined.
- You have addressed the concerns of the approver.

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.

A screenshot of a search filter form. The 'Status:' dropdown menu is highlighted with a red box and contains the text 'Declined'. To the right of the dropdown are 'Clear' and 'Search' buttons. Below the status dropdown is a 'Types:' dropdown menu with 'All' selected. Below that is a 'Hiring Administrator:' text input field with a search icon and a blue message that says 'No user selected.'.

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.

Hiring Administrator:*	Jonathan Hiring
Approval process:*	1 Approver
1. 1: BHM Permission ✘ Declined 8 Feb 2019	
Reason for declining the job: Budget concerns	
<input type="button" value="restart"/>	

What happens next

The review process restarts.

Related documents

[Job approvals](#)

[Offer approvals](#)