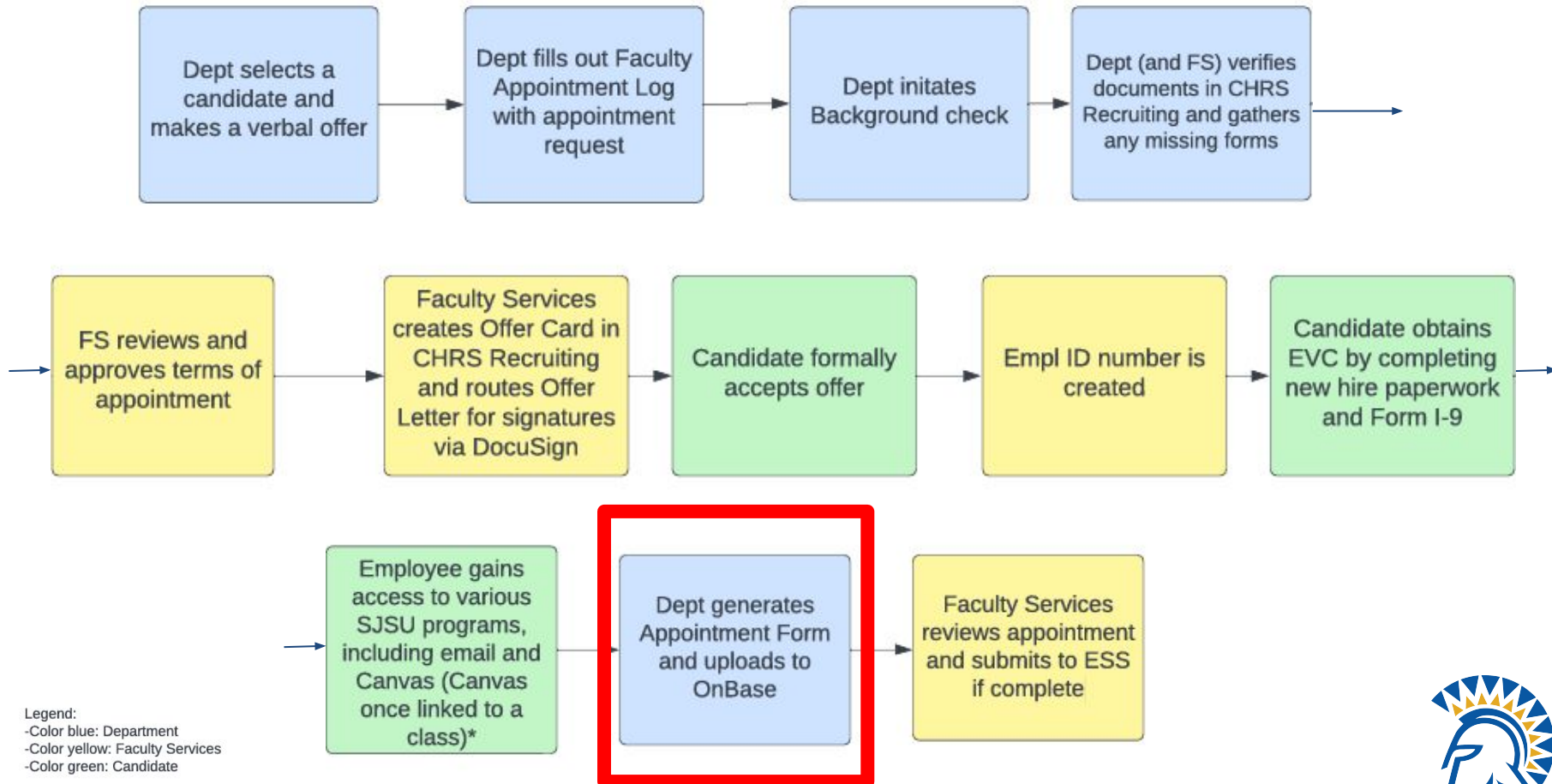


# Temporary Faculty Processing: Fall Semester Faculty Appointment Process - OnBase

*Crystal Mercado, Manager, Faculty Services Operations*

- Flow
- Appointment Types
- Required Appointment Paperwork
- Links to OnBase
- OnBase Form
- OnBase Reminders
- OnBase Statuses
- Notifications
- Appointment Document Reminders
- Processing Deadlines





- Faculty Appointment Types:
  - **New Hire:** first time working as a faculty at SJSU
  - **Rehire - Break in service of 12 months or more:** faculty is currently inactive and previously worked for the department more than 12 months ago (3 consecutive semesters or more)
  - **Rehire - Break in service of 12 months or less:** faculty is currently inactive and previously worked for the department less than 12 months ago (2 consecutive semesters or less)
  - **Active Concurrent - Reappointment:** faculty previously worked in the department until the end of their contract and will get another subsequent contract without a break in service
  - **Active Concurrent - New to Department:** faculty already works in a faculty position on-campus and will work in a different department as a new faculty
  - **Revision:** use when a change needs to be made to an appointment that has already been submitted
  - **Separation:** use when a faculty member will not work and has an active position



- [Checklist for All Temporary Faculty Appointments](#)

Required Materials	New Hire	Rehire More Than 12 Months Break in Service
Appointment Form	X	X
Offer Letter	X	X
CSU Employment Questionnaire	X	X
Reference & Background Check Release	X	X
CV & Cover Letter	X	X
CHRS Application	X	X
3 or more Letters of Recommendation or Skill Survey	X	Optional
Original Transcript	X	Optional



# Required Appointment Paperwork

Required Materials	Rehire Less Than 12 Months Break in Service	Reappointment	Revision
Appointment Form	X	X	X
Statement of Terms and Conditions	X	X	X
CSU Employment Questionnaire	X	X	Optional
Reference & Background Check Release	Optional	Optional	Optional
CV & Cover Letter	Optional	Optional	Optional
CHRS Application	Optional	Optional	Optional
3 or more Letters of Recommendation or Skill Survey	Optional	Optional	Optional
Original Transcript	Optional	Optional	Optional



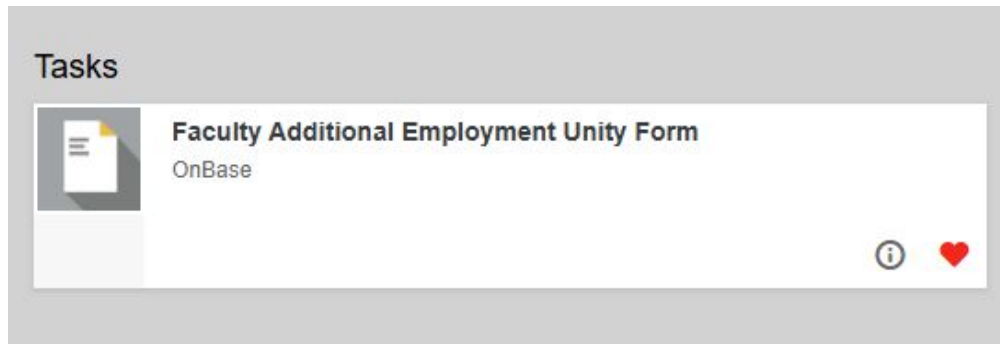
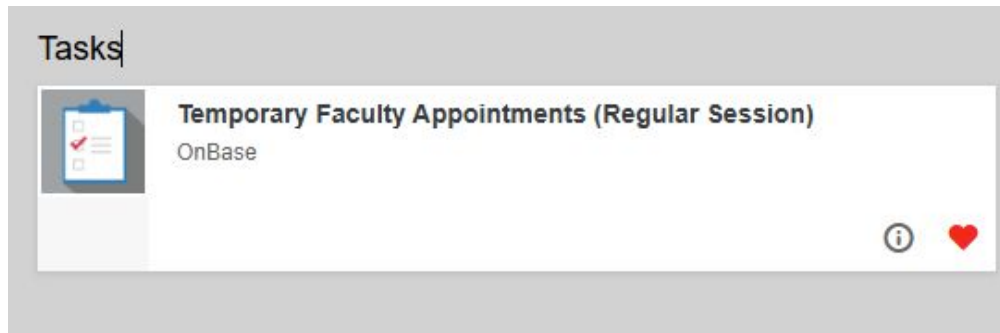
# Required Appointment Paperwork

- Concurrent hires can be hired inside or outside of CHRS Recruiting
  - PDF versions of required materials are found on the UP website

Concurrent Hire Required Materials	CHRS Recruiting	Non CHRS Recruiting
Appointment Form	X	X
Offer Letter or Statement of Terms and Conditions	Offer Letter	Statement of Terms and Conditions
CSU Employment Questionnaire	X	X
Reference & Background Check Release	X	X and Chair must review PAF
CV & Cover Letter	X	Optional
CHRS Application	X	Optional
3 or more Letters of Recommendation or Skill Survey	Optional	Optional
Original Transcript	Optional	Optional



- Find links to the OnBase form in [one.sjsu.edu](https://one.sjsu.edu)



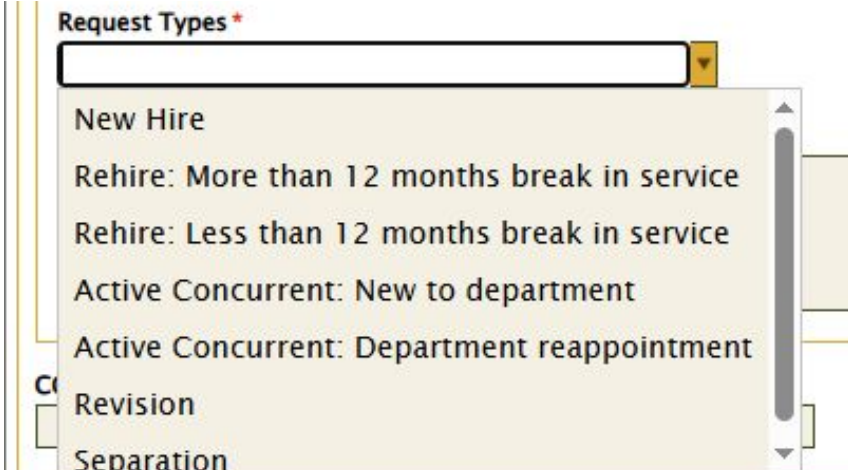


- At the top, select your College and Department Name
- Input SJSU ID to auto populate first and last name
  - If name does not appear, faculty newly created. Enter name in Comments
- Select Request Type
- Enter Appointment Effective Date
  - Should match the Effective Date on the Appointment Form

Temporary Faculty Appointment			
Form Status NEW	Document ID 		
Admin Name Crystal S Mercado	SJSU ID 010741445	College *	
Phone # 	Email crystal.s.mercado@sjsu.edu	Department Name *	
Employee Information			
SJSU ID *	First Name	Middle	Last Name
Request Types *	Appointment Effective Date		
Comments 			



- Choose the appropriate Request Type
  - Refer to the [Checklist for All Temporary Faculty Appointments](#)
- Appointments can be uploaded to OnBase in 2 ways:
  1. Each required document is saved to it's own PDF and uploaded individually
  2. One PDF with all required documents is uploaded



The screenshot shows a web form with a dropdown menu labeled "Request Types \*". The dropdown is open, displaying a list of request types. The options are: "New Hire", "Rehire: More than 12 months break in service", "Rehire: Less than 12 months break in service", "Active Concurrent: New to department", "Active Concurrent: Department reappointment", "Revision", and "Separation". The "Separation" option is highlighted in blue. To the left of the dropdown, there is a label "CO" and a checkbox.

Request Types *
New Hire
Rehire: More than 12 months break in service
Rehire: Less than 12 months break in service
Active Concurrent: New to department
Active Concurrent: Department reappointment
Revision
Separation



## New Hire and Rehire More Than 12 Months Break in Service

- Upload Appointment Form

### Appointment Documents

When using CHRS "Bulk Compile," or "compile and send" as named in [CHRS User Guide](#) (p. 24, Step 10), all required checklist items are provisioned except for the checklist and the appointment form. This checklist and the Appointment Form are generated by the department after the CHRS process is completed.

Appointment Form \*

Attach Appointment Form

Supporting Documents (Only if required)

Attach Supporting Documents



Rehire Less Than 12 Months Break in Service and Department Reappointment

- Upload Appointment Form, CSU Employment Questionnaire, and Statement of Terms and Conditions

Appointment Documents (Individual Upload) (0)

Appointment Form

Attach Appointment Form

CSU Employment Questionnaire

Attach CSU Employment Questionnaire

Statement of Terms and Conditions of Employment

Attach Terms and Conditions

Supporting Documents (Only if Required)

Attach Supporting Documents

OR

Appointment Packet (Single PDF) (0)

Document Name	Attachment Type	Actions
Available Attachment Types		
Appointment Packet	Attach Appointment Packet	



Revision

- Upload Appointment Form and Statement of Terms and Conditions

Appointment Documents (Individual Upload) (0)

Appointment Packet

Attach Appointment Packet

Statement of Terms and Conditions of Employment

Attach Terms and Conditions

Supporting Documents (Only if Required)

Attach Supporting Documents

OR

Appointment Packet (Single PDF) (0)

Document Name	Attachment Type	Actions
Available Attachment Types		
Appointment Packet	Attach Appointment Packet	



## Separation

- Upload Appointment Form
- Attach a Resignation Letter if the faculty member is resigning
- Effective date should match the effective date of the separation listed on the Appointment Form

**Separation Documents (0)**

Appointment Form \*

Attach Appointment Form

Resignation Letter

Attach Resignation Letter

Other Documents

Attach Other Documents



## Hire Concurrent: New to Department

- Indicate if CHRS Recruiting was used or not used
- If CHRS Recruiting was not used, the Chair must review the faculty's PAF
  - Input a date in the “Date PAF Reviewed” field
  - To initiate the process, Chairs should email [up-facultyservices@sjsu.edu](mailto:up-facultyservices@sjsu.edu)
  - Faculty member must sign the Reference and Background Check Release Form before the Chair can review the PAF

Employee Information

SJSU ID \*

First Name

Middle

Last Name

Request Types \*

Active Concurrent: New to department

Effective Date

Current SJSU faculty in another department, being appointed as new faculty in your department, must be vetted. If not collecting documents in CHRS, after the Reference and Background Check Release form is signed, the Chair shall request a PAF review from UP – FS and check references prior to making a job offer. New documents may be required. If you have questions or need further assistance, please contact UP – FS at (408) 924-2250 or [up-facultyservices@sjsu.edu](mailto:up-facultyservices@sjsu.edu).

How were documents collected \*

☐ CHRS Recruiting used

☐ CHRS Recruiting not used

Date PAF Reviewed

Comments



Hire Concurrent: New to Department - CHRS Recruiting used

- Upload Appointment Form
- Letters of Recommendation are optional

Appointment Documents (Individual Upload) (0)

Appointment Form

Attach Appointment Form

CSU Employment Questionnaire

Attach CSU Employment Questionnaire

Statement of Terms and Conditions of Employment

Attach Terms and Conditions

Supporting Documents (Only if Required)

Attach Supporting Documents

OR

Appointment Packet (Single PDF) (0)

Document Name	Attachment Type	Actions
Available Attachment Types		
Appointment Packet	Attach Appointment Packet	





Hire Concurrent: New to Department - CHRS Recruiting not used

- Upload Appointment Form, Statement of Terms and Conditions, CSU Employment Questionnaire, Reference and Background Check Release Form, CV, Letter of Interest
- Letters of Recommendations are optional
- If transcripts with qualifying degree is not found in PAF review, official transcripts should be uploaded

Appointment Documents (Individual Upload) (0)

Appointment Form

Attach Appointment Form

CSU Employment Questionnaire

Attach CSU Employment Questionnaire

Statement of Terms and Conditions of Employment

Attach Terms and Conditions

Supporting Documents (Only if Required)

Attach Supporting Documents

OR

Appointment Packet (Single PDF) (0)

Document Name	Attachment Type	Actions
Available Attachment Types		
Appointment Packet	Attach Appointment Packet	



- Enter the Effective Date, which should match the effective date on the Appointment Form
- Upload appointment documents to OnBase via one PDF with all required forms or multiple PDFs, one for each required form
- Use Request Type “Separation” if a faculty member is being separated due to resignation or other reasons
  - If an Entitled faculty member is not working for a semester or year of their 3 year appointment, use Request Type “Active Concurrent: Department Reappointment”
- Optional to enter information into the Comments box
- OnBase will send out email notifications to the initiator of the form (and CCs if added) to provide updates on status
- Choose “Rehire Less Than 12 Months Break in Service” if the faculty member is inactive for 2 consecutive semesters or less
- Choose “Active Concurrent Department Reappointment” if a the faculty member was active in the spring 2025 semester and will continue to be active in the fall 2025 semester



# OnBase Reminders

- Attachments can be removed by clicking on the “Remove” link
- Optional documents can be added to the attachment box titled “Attach Supporting Documents”
- More than one document can be added to the “Attach Supporting Documents” box

## Appointment Documents (Individual Upload) (5)

Appointment Form

(Pending) [Test\\_Appointment Form.pdf](#) [\[Remove\]](#)

Attach Appointment Form

CSU Employment Questionnaire

(Pending) [Test\\_CSU Employment Questionnaire.pdf](#) [\[Remove\]](#)

Attach CSU Employment Questionnaire

Statement of Terms and Conditions of Employment

(Pending) [Test\\_Statement of Terms and Conditions.pdf](#) [\[Remove\]](#)

Attach Terms and Conditions

Supporting Documents (Only if Required)

(Pending) [Test\\_Letter of Interest.pdf](#) [\[Remove\]](#)

(Pending) [Test\\_CV.pdf](#) [\[Remove\]](#)

Attach Supporting Documents




- Common Statuses
  - **New:** FS reviewing appointment after department submits in OnBase
  - **Faculty Services Approved:** Appointment reviewed by FS and moved to PPTS for final processing
  - **Completed:** Form has gone through UP processing and action taken. Employee activated, terminated, time base updated...etc
- Unique Statuses
  - **Returned to Dept for Edits:** FS returns an appointment to the department as edits are needed or missing documents
  - **Revised by Dept:** Dept updated an appointment and is now ready for FS review
  - **Removed from WF:** Appointment submitted but no action taken. Outdated form or additional paperwork submitted that does not affect appointment salary, dates, or FTE
  - **Returned to FS:** PPTS sends appointment to FS for updates or questions

Temporary Faculty Appointment	
Form Status	<input type="text" value="NEW"/>
Admin Name	<input type="text" value="Crystal S Mercado"/>
Phone #	<input type="text"/>



- Temp Fac Appt (2886393) - Mi D
- noreply@sjsu.edu 9:21 PM (6 minutes ago)
- to me
- Dear Crystal S Mercado,
- This email is confirmation that Faculty Services has received the appointment request for Rehire: more than 12 months break in service - Mi D (00820 ).
- To view the form:
- Sign in to [OnBase](#).
- View the top of the page for the Form Status. Below are the different statuses:
- **NEW:** Once the form has been submitted
  - **FACULTY SERVICES APPROVED:** Faculty Services has reviewed and approved the appointment request.
  - **RETURNED TO DEPT FOR EDITS:** Faculty Services has reviewed the appointment request but the appointment requires corrections. Details in the comment box will be provided.
  - **ESS TO PROCESS:** Once Faculty Services approves the appointment request, the appointment request will be routed to Employee Support Services.
  - **COMPLETED:** The appointment request has been submitted to Payroll.
- If you have any questions, please email [Faculty Services](#).

- The initiator of the form will receive notification when appointment is approved by Faculty Services

FS Approved: Temp Fac Appt (2886391) - Eva  

Mc

Inbox x

**noreply@sjsu.edu**

9:29 PM (0 minutes ago)



to me ▼

Dear Crystal S Mercado,

The appointment request for New hire - Eva M (0127 ) has been approved.



The approved request has been sent to Employee Support Services.

If you have any questions, please email [Faculty Services](#).

Sincerely,  
University Personnel  
Faculty Services



- The initiator of the form will receive notification when appointment is processed by the Payroll Personnel team
- The appointment is now considered complete

Completed: Temp Fac Appt (2886391) - Eva  

M

Inbox x

**noreply@sjsu.edu**

9:34 PM (0 minutes ago)



to me ▼

Dear Crystal S Mercado,

The appointment request for New hire - Eva M (012 ) has been completed by Employee Support Services and Submitted to Payroll.

If you have any questions, please email [Faculty Services](#).

Sincerely,  
University Personnel  
Faculty Services



- Faculty Services will return the appointment to the department for updates if errors prevent the appointment from moving forward
  - Common reasons: Required documents are missing, no signatures, need an updated form
- Initiator will receive an email with the reason and a link to the form
  - Click on the link to the OnBase form within the email and upload requested items
  - Do not create a new appointment in OnBase

Action Required: Temp Fac Appt (2886393) -    
Mi D · · Inbox x

noreply@sjsu.edu  
to me ▾

9:36 PM (5 minutes ago) ☆ ↶ ⋮

Dear Crystal S Mercado,

The appointment request for Mi D · · is being returned due to the following reason(s):

**Appointment Form is missing signatures. Please upload form with signatures.**

To resubmit, follow the following steps:

1. Sign in to [OnBase](#).
2. Edit the document(s) as suggested in the comments section
3. Select the Submit button on the bottom of the form. After selecting Submit, the page may not close or redirect; please close the browser window.

If you have any questions, please email [Faculty Services](#).

Sincerely,  
University Personnel  
Faculty Services





- Faculty Services may delete appointments if it is deemed that the appointment should not be processed
  - Common reasons: Appointment is a duplicate and was already submitted

Canceled: Temp Fac Appt (2886413) - Anthony H Inbox x

noreply@sjsu.edu  
to me ▼

9:38 PM (2 minutes ago)



Dear Crystal S Mercado,

The appointment request for Active concurrent: department reappointment - Anthony Hi (012 ) has been canceled due to the following reason(s):

Packet deleted since it is a duplicate

A canceled form cannot be revised. To submit a new request for Anthony Hilton, please complete a new appointment request.

If you have any questions, please email [Faculty Services](#).

Sincerely,  
University Personnel  
Faculty Services



# Appointment Document Reminders

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- Check in with your Dean's Office for your college's process
- Ensure that documents are being uploaded for the faculty member listed on the OnBase form
- Ensure that all required documents are submitted for the Request Type
- Upload documents for AY 2025-2026
- Required documents should have valid signatures
- Forms are filled out completely
- Appointment Form and Statement of Terms and Conditions must match the information in CSU Contract Data
- Salary and rank on Appointment Form and Statement of Terms and Conditions should match the prior semester
- Dates for faculty working semesters/AY should align with the start and end of the semester/AY
- If an appointment is returned for edits, use the link in the email to return to the appointment in OnBase and make the necessary changes
- No need to submit the PDF of the checklist or documents that are not listed on the checklist (i.e. SC-1)
- Review email notifications for appointments that have been submitted so that duplicate appointments are not submitted



- [Temporary Faculty and Academic Student Employee Appointment Processing Deadlines – Fall 2025](#)
- Refer to the Processing Deadlines for dates of milestones
- Important dates:
  - Thursday, July 31, 2025: Submit names for hires/rehires to Faculty Appointment Log
  - Monday, August 4, 2025: Submit appointments to OnBase
  - Monday, August 18, 2025: Start of semester; all I-9s completed
- Impact of late appointment submissions:
  - Faculty not reappointed by mass termination date will be terminated and paid out. If they are reappointed afterwards, they will not receive pay in August in next AY. Record shows a break in service. Benefits will stop.



- Email [up-faculty-appointments@sjsu.edu](mailto:up-faculty-appointments@sjsu.edu)
- Attend [Open Labs](#)

