Office of Human Resources

	How to Approve a Requisition in NeoEd

Situation: You are a member of the Requisition Approver Group, and you receive an email notification to take an action on a new requisition. You need to review, approve, deny, put a requisition on hold, or add any relevant information.

There are 2 main approval groups (see the full list and example in Appendix):

- Approval group from hiring offices and departments: These are cost center managers specific to an office, division or department.
- Fiscal, Business & Administrative, Presidential and HR approval group: Approvers from 4 groups will approve all PCC job requisitions.
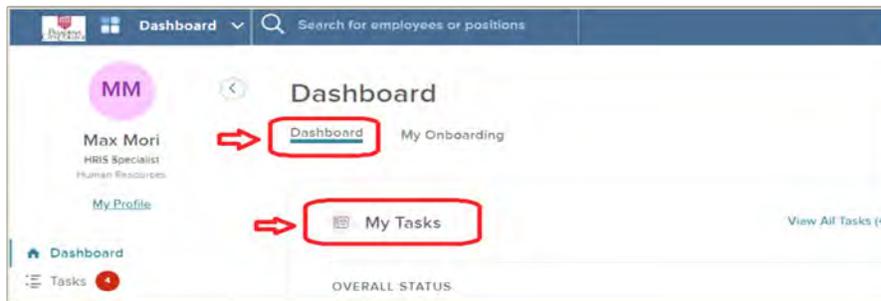
1. Login
   - Go to URL: https://pasadena.edu/faculty-and-staff/index.php
   - Click NeoEd Workforce Management Platform
   - Use your PCC login credentials to log in

2. Navigation
   - The new unified Dashboard opens.
   - Go to Section My Tasks.

   Hints: If you get lost while navigating around, always click the unified Dashboard icon on the top left corner.

- Go to Section Recruiting Approval > Click the req title.

- If you have a long list, go to unified Dashboard > Tasks (left vertical menu) > Search > Type in some relevant words

- Click on the Requisition title to open.

Type	⇕	Related To	⇕	Status
Approval		Req Police Officer Single Role (00062		Open

- The Approval screen opens.
    - Action buttons are on the top left area.
    - Workflow status are on the right pane.
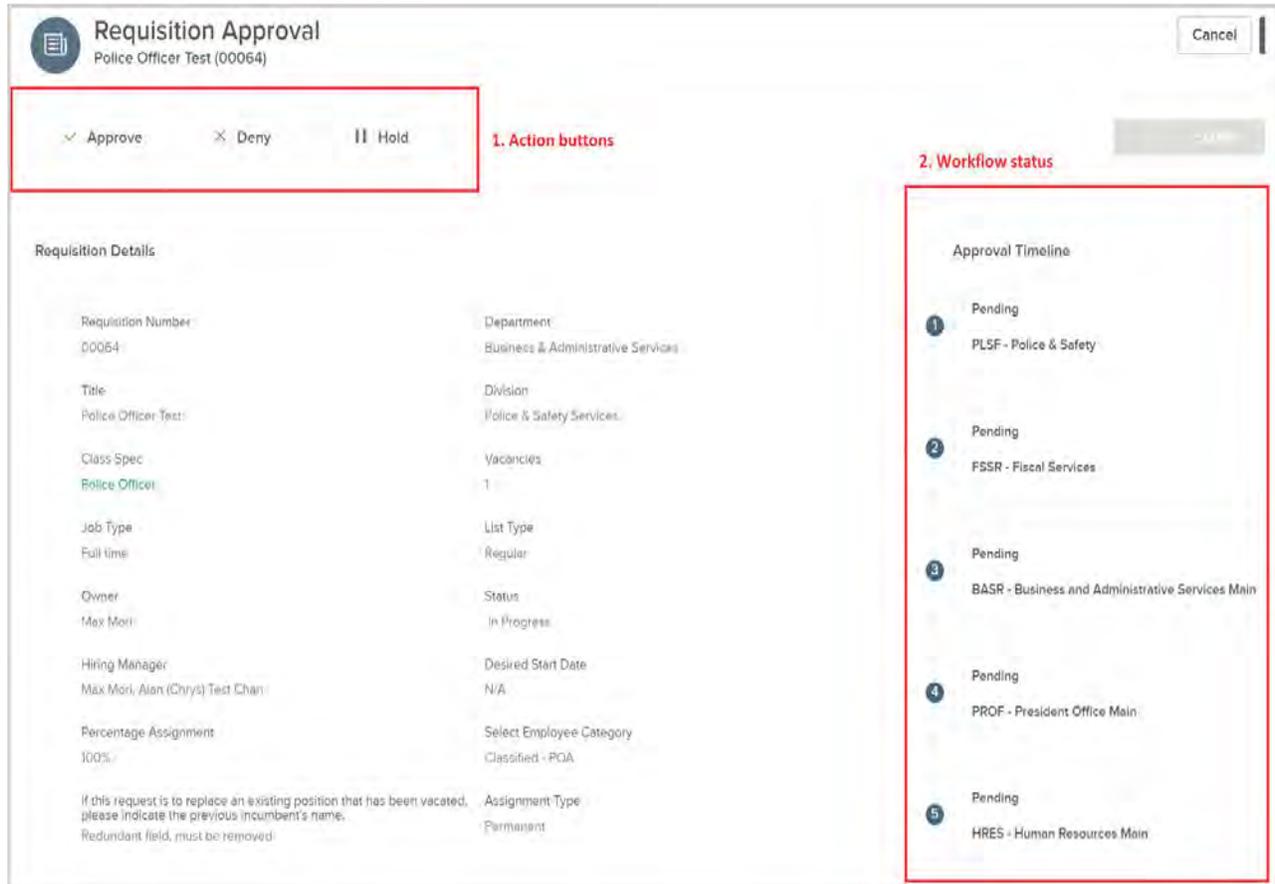
3. Actions: You can put a requisition on hold, approve, or deny.

- Hold: If you need more time to decide, place the requisition on hold. Click Hold, add optional comments to let other stakeholders requisition know the reason.
- **Important: You may put the req on hold and ask the originator for minor correction. For major errors (Department, Division, Hiring Managers, Workflow etc.), deny and return the requisition to the originator to correct.**
- ▢ **If Originators accidentally fill in the Position, please return and ask them to blank it out.**

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- Approve: Click Approve, add optional comments if needed, then Submit.
    - Fiscal Services approvers (Important):
        - **Enter the Position Control Number (PCN) in the Approval Comment box**
        - **If this is a grant funded position, and the end date is not in the Requisition (General Comment section), enter the Grant End Date here.**

- Deny:
    - Deny if any requisitions details are wrong.
    - Important: Always enter a reason in the approval comment box.
    - Fiscal Services approvers:
        - **Important:** Check the workflow against the different types of workflows in the Appendix section. Deny if it is incorrect.
        - **If the Position is not blank and incorrect, return to originators to fix.**
    - You can send back one step, or several steps. If error is in the requisition details, send it back to the very first step. The originator will update the requisition.
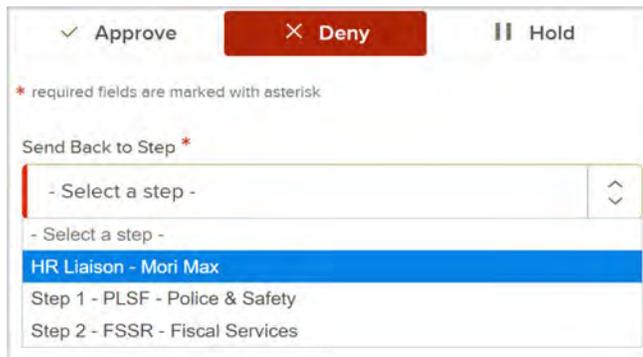
    - Important:

4. Where does the requisition go after you take an action?

Action	Approval Group	Viewable on Screen
No action, Hold	Yourself	My Task
Approved	The next approval group in the workflow	Req. leaves My Task/ "View All"
Denied	The inbox of the approver on the step you send it back to	Req. leaves My Task.

5. View an Approval Comment:
    - Open the Req.
    - Click the Approvals tab.
    - Expand the individual approver section.
    -

6. View the Approval Workflow History of a req. you're involved with:
   - Open the Req.
   - Click the Approvals tab.
   - Approval Timeline pane is on the right.

APPENDIX

1. **Standard Workflow**:

    1. Cost Center Manager (Hiring Office)
    2. Fiscal Services (Budget)
    3. Functional Area Vice President (Hiring Department)
    4. Business & Administrative Services VP
    5. Superintendent
    6. Human Resources

2. **New position to the district**. Modify the workflow as follows:

    1. Cost Center Manager (Hiring Office)
    2. **Superintendent**
    3. Fiscal Services (Budget)
    4. Functional Area Vice President (Hiring Department)
    5. Business & Administrative Services VP
    6. Human Resources

3. **Vacant position with change in Job Classification and <u>increase</u> in Salary Grade OR Position not having funding for Fiscal Year.** Modify the workflow as follows:

    1. Cost Center Manager (Hiring Office)
    2. Functional Area Vice President (Hiring Department)
    3. Business & Administrative Services VP
    4. Superintendent
    5. Fiscal Services (Budget)
    6. Human Resources

4. **Grant funded position**. Modify the workflow as follows:

    1. Cost Center Manager (Hiring Office)
    2. Add **Fiscal Group – Grant Funded** as follows:
        a. Click "Add Approval Group"
        b. Select "**FSGR – Fiscal Services – Grant Related**"
        c. Add group member(s): Brigitte Norsworthy, Jessie Wang, Anthony Brown, Denise Vidrio, Rosette Jaltorossian as approvers.
            i. Note: Check with your Cost Center Manager OR FSGR for the specific member(s) of this group to be added as approver.
        d. **Save**, then drag this group to the second position (after #a on this list). See instructions on reordering approval group in the Notes section.
    3. Fiscal Services (Budget)
    4. Functional Area Vice President (Hiring Department)
    5. Business & Administrative Services VP
    6. Superintendent
    7. Human Resources

5. **New grant funded position to the district**. Modify the workflow as follows:

    1. Cost Center Manager (Hiring Office)

2. Superintendent
3. Fiscal Group – Grant Funded ("**FSGR – Fiscal Services – Grant Related**")
4. Fiscal Services (Budget)
5. Functional Area Vice President (Hiring Department)
6. Business & Administrative Services VP
7. Human Resources

6. **Positions funded by multiple cost centers**. Modify the workflow as follows:

   1. **Cost Center Manager #1 (Hiring Office)**
   2. **Cost Center Manager #2 (Hiring Office)**
   3. **Cost Center Manager #3 (Hiring Office)**
   4. Superintendent
   5. Fiscal Services (Budget)
   6. Functional Area Vice President (Hiring Department)
   7. Business & Administrative Services VP
   8. Human Resources

7. **Positions funded by grant and cost center.** Modify the workflow as follows:

   1. **Cost Center Manager (Hiring Office)**
   2. **FSGR – Fiscal Services – Grant Related** Superintendent
   3. Fiscal Services (Budget)
   4. Functional Area Vice President (Hiring Department)
   5. Business & Administrative Services VP
   6. Human Resources

8. **Position for hiring offices with flat hierarchy**.

   Some hiring offices have a flatter approval hierarchy than others, where the Cost Center Manager is also the Functional Area Manager (Steps #1 and #3 in the Standard Workflow).

   Example: Alex Boekelheide is the Cost Center Manager for Strategic Communication and Marketing, but is also the Hiring Manager for his department.

   Modify the workflow as follows:

   1. **Cost Center Manager (Hiring Office)**
   2. Fiscal Services (Budget)
   3. Business & Administrative Services VP
   4. Superintendent
   5. Human Resources

9. **The Funding office is different than the Hiring office.**
   These are jobs that report to a particular office, but are funded by the cost center under a different office. If there were no previous agreements, contact HR to trigger a coordination between the Hiring Office, Funding Office, and Fiscal.