



**HCM 8.9 Business Process Guide  
Dept/Dean's Office End User  
Create a NEW Academic Year Contract  
& Add Subsequent Terms within the  
Academic Year**

**Last Revised: 09/03/2009**

**FINAL**

## Create a New Temp Faculty Contract

**Prerequisite:** Person must have an existing Empl ID in PeopleSoft. The Empl ID could be a student only ID, a student employee ID or a current or prior employee ID.

Use CSUID Search to find the Empl ID. The Emplid can be copied and pasted in the Empl ID field when creating the new contract.






If the person is not found via CSUID Search by using all search options, STOP. The Dean's Office will enter the Contact Data.

All Temporary Unit 3, Teaching Associates, Graduate Assistants and other miscellaneous classifications will only have one contract per year per department. Subsequent quarters within the academic year will require a new effective dated row to be added for each term on the Contract Status Content Tab.

### **PROCESS – Adding NEW ACADEMIC YEAR Contract**

The CSU Temporary Faculty Contract Data component is used to process contract data for various academic related employees. This data is used for the hire/rehire process for pay purposes.

#### **Navigation: CSU Temp Faculty → CSU Contract Data**

Processing Steps	Screen Shot
<ul style="list-style-type: none"> <li>Click on the Add a New Value tab or <a href="#">Add a New Value</a> hyperlink</li> <li><b>EmplID</b> – Use one of the following methods to enter Emplid to prevent keying errors:  Use the  to locate the Empl ID  Use CSUID search results (copy and paste Emplid)  or Use Contract Search results (copy and paste Emplid).</li> <li><b>CSU Contract Data:</b> Accept the default of "NEW"</li> <li><b>Department:</b> Enter DeptID. You can either key in the Dept ID number or use the  to find the Dept ID.</li> <li>Click on the  button.</li> </ul> <p> The <a href="#">Contract Status/Content page</a> displays.</p>	

## Contract Status/Content

The Contract Status/Content page is used to record basic information about the CSU Contract, including the contract begin and end dates, contract type, comp rate, position number, term, WTU and any associated comments.

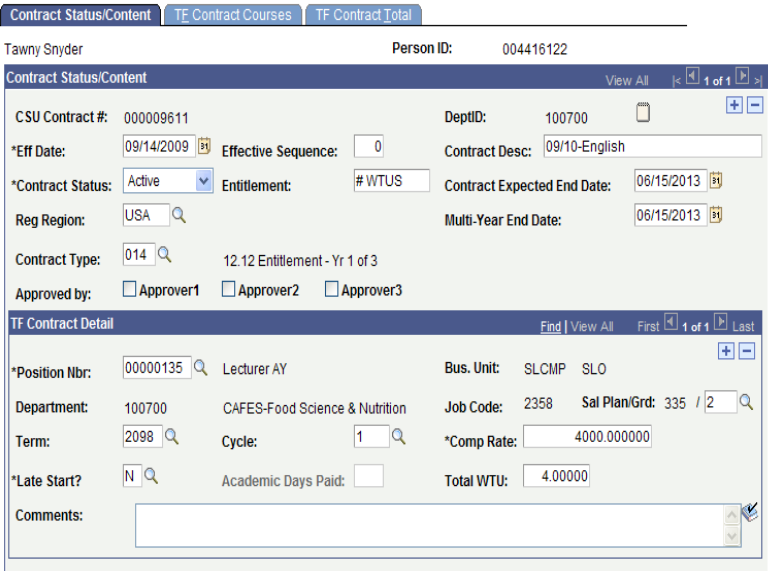
**1** Only ***ONE CONTRACT PER YEAR*** PER DEPARTMENT – Create a separate contract for each department.


This page is effective dated. Once you have hit the SAVE button and the effective date of the contract has passed, you must be in Correction Mode to update information on the Contract Status/Content pages.

If the effective date of the contract is in the future and you hit the SAVE button, you can update the contract

Correction Mode is only given to the Dean’s Office. You must communicate any revisions to the Dean’s Office

### Navigation: CSU Temp Faculty → CSU Contract Data → Contract Status/Content

Processing Steps	Screen Shot
<ul style="list-style-type: none"> <li>• <b>CSU Contract #:</b> Defaults to <b>NEW</b>. After entering data and saving the screen, the system will assign a number.</li> <li>• <b>Effective Date:</b> Defaults to today’s date. Enter the actual start date of the appt (generally the start of the term).  <b>NOTE:</b> An warning message will appear if the effective date is incorrect  <b>NOTE:</b> Each term will require a new effective dated row.</li> <li>• <b>Sequence:</b> Defaults to 0.</li> <li>• <b>Contract Description:</b> This is the title of the contract. <b>Use this Naming Convention:</b> Use the naming convention of ‘YY/YY – Dept Name’. Example: 07/08 – English. This field is case sensitive: attempt to key your contract name using upper/lower case characters.</li> <li>• <b>Contract Status:</b> Accept the default of “Active”</li> <li>• <b>Entitlement:</b> If the lecturer has 12.3 or 12.12 entitlement, enter the number of WTUS the lecturer is entitled</li> <li>• <b>Contract Expected End Date:</b> Appointment End Date of the full assignment. ie; If the assignment is a 12.12 appointment the</li> </ul>	 <p><b>Warning message if Eff Date is not the start date of the term</b></p> <p>Warning – The contract dates entered do not match the term start date of 09/14/2009 or end date of 12/12/2009 As specified in the CSU Temp Faculty Term Table. Please verify the dates entered.</p>

Processing Steps	Screen Shot																														
<p>Contract Expected End Date is the end of the 3 year appointment.</p> <ul style="list-style-type: none"> <li><b>Multi-Year End Date:</b> This is only required for Contract Type 12.12 Entitlement 014, 015 or 016</li> </ul> <p><b>NOTE:</b>  <b>12.3 Entitlement</b> is based on a lecturer working all 3 terms (Fall, Wtr, Spr) in the prior academic year AND the lecturer is hired to work the following Fall term. The number of entitled WTUs is the total of the prior years WTUs for the 3 terms.  <b>12.12 Entitlement</b> is based on a lecturer working 6 consecutive years at 2 or more terms per year. Academic Personnel manages qualifying the 12.12 entitled lecturers. The number of entitled WTUs is based on the total WTUs in the 6<sup>th</sup> year of their 6 consecutive years.</p> <ul style="list-style-type: none"> <li><b>Regulatory Region:</b> Defaults to USA.</li> <li><b>Contract Type:</b> See table to the right.</li> <li><b>Approved by:</b> The three separate approver check boxes are for the colleges to manage their internal approval process prior to submitting to Academic Personnel</li> <li><b>Position Number:</b> Enter Position Number</li> </ul> <p><b>NOTE:</b> If the position number is unknown you may click on  which will allow you to search for all 'active' positions within that department.</p> <ul style="list-style-type: none"> <li><b>Business Unit, Department, Job Code:</b> These default from the position. Accept values</li> <li><b>Sal Plan/Grade:</b> Enter Grade</li> <li><b>Term:</b> Enter 4-digit term - Use Terms from SA.</li> </ul> <p><b>NOTE:</b> Only one Term is allowed per effective date. If you are setting up multiple terms, you will need to add a row on the Contract Status Content page.</p> <ul style="list-style-type: none"> <li><b>Cycle:</b> '1' is the only cycle</li> </ul>	<p><b>Contract Type Valid Value Table</b></p> <table border="1"> <thead> <tr> <th>Contract Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>001</td> <td>Academic Year Appointment</td> </tr> <tr> <td>002</td> <td>12 month Appointment</td> </tr> <tr> <td>003</td> <td>12.3 Entitlement</td> </tr> <tr> <td>006 – Not Used</td> <td>Semester Appointment</td> </tr> <tr> <td>007</td> <td>One Quarter Appointment</td> </tr> <tr> <td>008</td> <td>Two Quarter Appointment</td> </tr> <tr> <td>009 – Optional</td> <td>Extra Quarter Appointment</td> </tr> <tr> <td>010 – Not Used</td> <td>Summer Session Appointment</td> </tr> <tr> <td>011 – Not Used</td> <td>Special Session Appointment</td> </tr> <tr> <td>012</td> <td>10 month Appointment</td> </tr> <tr> <td>014</td> <td>12.12 Entitlement - Yr 1 of 3</td> </tr> <tr> <td>015</td> <td>12.12 Entitlement - Yr 2 Of 3</td> </tr> <tr> <td>016</td> <td>12.12 Entitlement - Yr 3 Of 3</td> </tr> <tr> <td>CON – Not Used</td> <td>Contractor/Consultant</td> </tr> </tbody> </table>	Contract Type	Description	001	Academic Year Appointment	002	12 month Appointment	003	12.3 Entitlement	006 – Not Used	Semester Appointment	007	One Quarter Appointment	008	Two Quarter Appointment	009 – Optional	Extra Quarter Appointment	010 – Not Used	Summer Session Appointment	011 – Not Used	Special Session Appointment	012	10 month Appointment	014	12.12 Entitlement - Yr 1 of 3	015	12.12 Entitlement - Yr 2 Of 3	016	12.12 Entitlement - Yr 3 Of 3	CON – Not Used	Contractor/Consultant
Contract Type	Description																														
001	Academic Year Appointment																														
002	12 month Appointment																														
003	12.3 Entitlement																														
006 – Not Used	Semester Appointment																														
007	One Quarter Appointment																														
008	Two Quarter Appointment																														
009 – Optional	Extra Quarter Appointment																														
010 – Not Used	Summer Session Appointment																														
011 – Not Used	Special Session Appointment																														
012	10 month Appointment																														
014	12.12 Entitlement - Yr 1 of 3																														
015	12.12 Entitlement - Yr 2 Of 3																														
016	12.12 Entitlement - Yr 3 Of 3																														
CON – Not Used	Contractor/Consultant																														

Processing Steps


available at this time

- **Comp Rate:** Monthly Base Rate
- **Late Start?:** Accept the default of "N"

**NOTE:** This is only used when the AY temp fac will be either starting late or ending their appointment early. (E – Early Term or L – Late Start). The Academic Days Paid field will ungray. Enter number of days worked.

- **Total WTU:** Enter the WTUs for the term

**WTU Table:** Navigate to 'Set Up HRMS/CSU Product Related Setup/CSU Temp Faculty Setup/CSU WTU Table'

- **Comments:** For college/dept use
- Click the  **Button**

Screen Shot

Contract Status/Content | TF Contract Courses | TF Contract Total

Tawny Snyder Person ID: 004416122

Contract Status/Content View All 1 of 1

CSU Contract #: 000009611 DeptID: 100700

\*Eff Date: 09/13/2009 Effective Sequence: 0 Contract Desc: 09/10-English

\*Contract Status: Active Entitlement: # WTUS Contract Expected End Date: 06/15/2013

Reg Region: USA Multi-Year End Date: 06/15/2013

Contract Type: 014 12.12 Entitlement - Yr 1 of 3

Approved by:  Approver1  Approver2  Approver3

TF Contract Detail Find | View All First 1 of 1 Last

\*Position Nbr: 00000135 Lecturer AY Bus. Unit: SLCMP SLO

Department: 100700 CAFES-Food Science & Nutrition Job Code: 2358 Sal Plan/Grd: 335 / 2



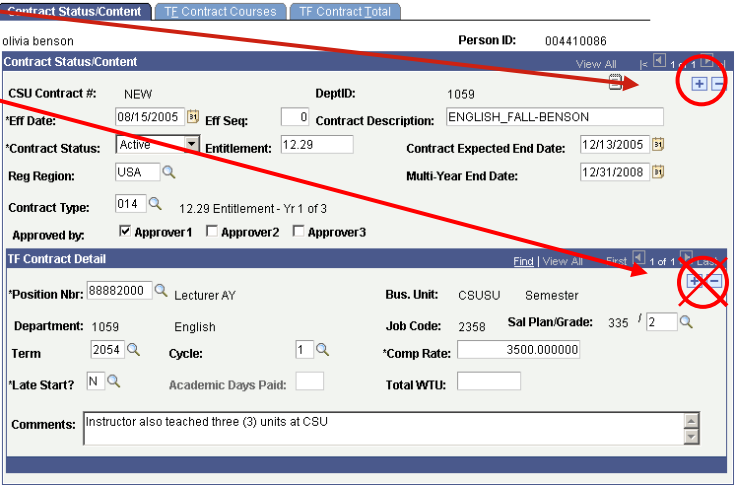
Term: 2098 Cycle: 1 \*Comp Rate: 4000.000000

\*Late Start? N Academic Days Paid: Total WTU: 4.00000

Comments:

## Adding Terms

If the employee is being offered more than one term of employment at this time, you can add subsequent terms. Please make sure you have saved the first term; the CSU Contract # will change from NEW to an 8 digit number.


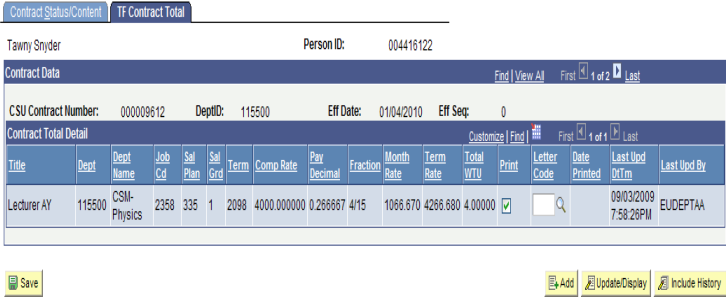
Processing Steps	Screen Shot
<p><b>Add a New Term:</b></p> <p>Click on the  .</p> <p><b>NEVER</b> click on the  located in the <b>TF Contract Detail</b> section.</p> <p>All the fields populate from the prior row.</p> <p>Update the required fields for the new term. Generally the fields required to update are:</p> <ul style="list-style-type: none"> <li>• <b>Eff Date:</b> Start of new term</li> <li>• <b>Contract Expected End Date:</b> If hiring term by term and there is no entitlement</li> <li>• <b>Term:</b> Enter New Term</li> <li>• <b>Total WTU:</b> Enter WTU</li> </ul> <p><b>WTU Table:</b> Navigate to 'Set Up HRMS/CSU Product Related Setup/CSU Temp Faculty Setup/CSU WTU Table'</p>	 <p>The screenshot shows the HRMS interface for adding a new term. The top section is 'Contract Status:Content' and the bottom section is 'TF Contract Detail'. Red arrows point from the text in the 'Processing Steps' column to the plus icons in the screenshot. One plus icon is circled in red, and another is crossed out with a red X.</p>

## TF Contract Total Page Steps

Use this page to review all of the contract information entered.

- Information listed on this page is for display purposes only and is populated based on the information entered on Contract Status/Content Page.

**Navigation: CSU Temp Faculty → CSU Contract Data → TF Contract Total**

Processing Steps	Screen Shot
<ul style="list-style-type: none"> <li>After review and contract data is accurate,, click on the  button.</li> <li><b>Letter Code:</b> This is not used at this time. The goal is to add the ability to create the Temp Fac Contract letters and AP101 using this feature.</li> </ul>	 <p>The screenshot displays the 'TF Contract Total' page for Tawny Snyder (Person ID: 004416122). It includes a 'Contract Data' section with fields for CSU Contract Number (000009612), DeptID (115500), Eff Date (01/04/2010), and Eff Seq (0). Below this is a 'Contract Total Detail' table with columns for Title, Dept, Dept Name, Job Cd, Sal Plan, Sal Grd, Term, Comp Rate, Pay Decimal, Fraction, Month Rate, Term Rate, Total WTD, Print, Letter Code, Date Printed, Last Upd D/T/m, and Last Upd By. A single row is visible for 'Lecturer AY' in Dept 115500, CSM-Physics, Job Cd 2358, Sal Plan 335, Sal Grd 1, Term 2099, Comp Rate 4000.000000, Pay Decimal 0.266667, Fraction 4/15, Month Rate 1066.670, Term Rate 4266.680, Total WTD 4.000000. The 'Print' checkbox is checked, and the 'Date Printed' is 09/03/2009 7:58:26PM. The 'Last Upd By' is EUDEPTAA. At the bottom of the screenshot are buttons for 'Save', 'Add', 'Update/Display', and 'Include History'.</p>