



CMS Project Management Office

HCM 8.9 Business Process Guide Revise a Temporary Faculty Contract

Last Revised: 11/06/2007



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REVISION CONTROL

Document Title: Revise a Temporary Faculty Contract Business Process Guide

Author: S. Deffenderfer

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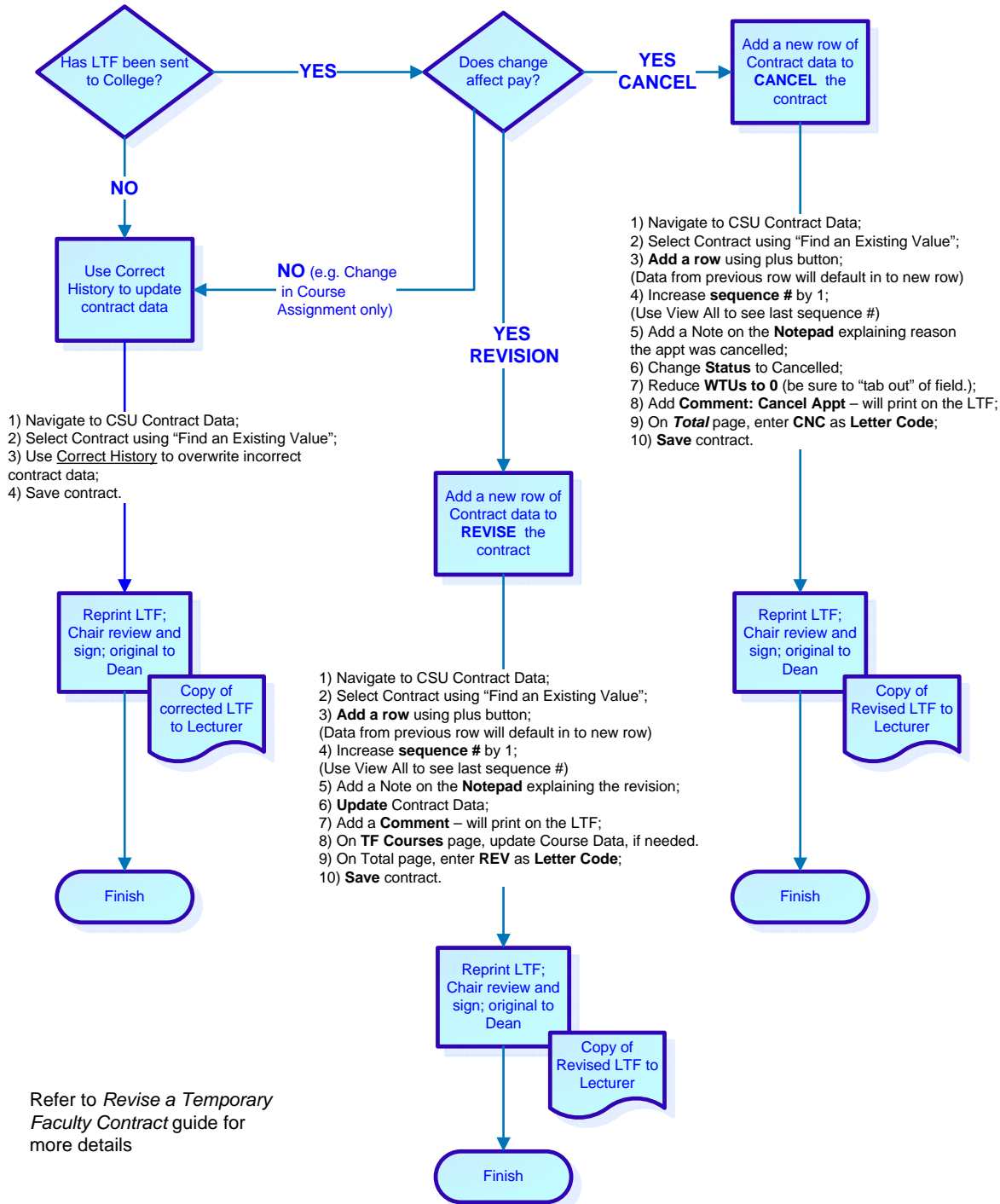
Date	By	Action	Pages
5/22/2007	S. Deffenderfer	Release of New Document	All
8/17/2007	S. Deffenderfer	Correction to cancelled contract instructions	7
11/06/2007	S. Deffenderfer	Correction to cancelled contract instructions (missed step)	7
11/06/2007	S. Deffenderfer	"LTF" replaced with "Transaction Form" to reflect multiple types of appointments.	all



Business Process Diagram

Revise TF Contract Process
(for Corrections, Revisions, Cancellations)

Navigation: *CSU Temp Faculty > CSU Contract Data*



Refer to *Revise a Temporary Faculty Contract* guide for more details



Introduction

The CSU Temporary Faculty Contract Data component is used to process appointment data for lecturers.

In general, the HCM 8.9 Business Process Guides should be used in the following order:

- CSU ID Search
- Add a Person of Interest (if new hire)
- Create a Temporary Faculty Contract
- Temp Faculty Contract – Batch Print
- **Revise a Temporary Faculty Contract**
- Temp Faculty Contract – Individual Print

The guide listed in bold is the guide you are working on now.

Overview

Revisions to lecturers' appointments include:

- Revisions that affect pay – e.g. increase or decrease in time base;
- Cancelled appointments.
- Changes in the lecturer's course assignment that do not affect pay – e.g. the courses change, but the total WTUs are the same;
- Corrections to data entry errors;

A revision that occurs **before** the Transaction Form is sent to the Dean, can be done using the [Correct History](#) function. [Correct History](#) overwrites the data previously entered on the contract. This is also the method used to make changes to course assignments.

A revision that occurs **after** the Transaction Form is sent to the Dean, is done by inserting another row, with a new effective sequence number, and updating the contract data. This is also the method used to cancel an appointment.

After the corrections/revisions/cancellations have been completed, a new Lecturer Transaction Form is printed and processed.

Revising a Temporary Faculty Contract

The first step in Revising a Temporary Faculty Contract is to navigate to the [CSU Contract Data](#) page and search for the existing contract.

Please see the [Create a Temporary Faculty Contract](#) guide for more detailed information and field definitions.






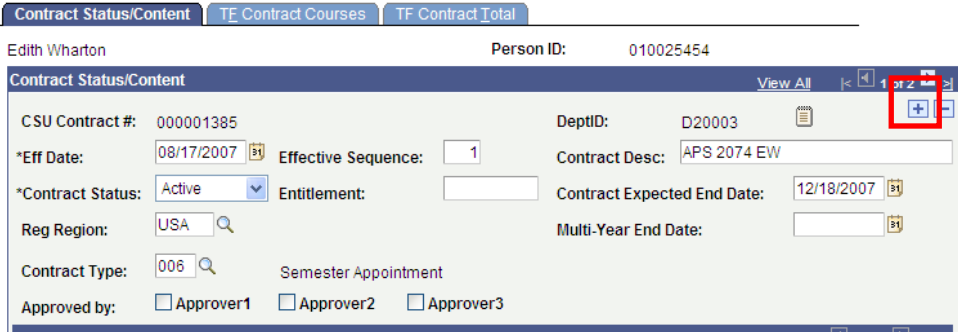
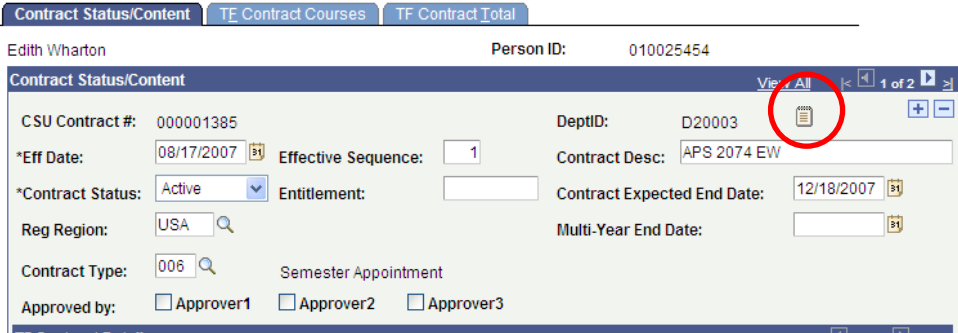
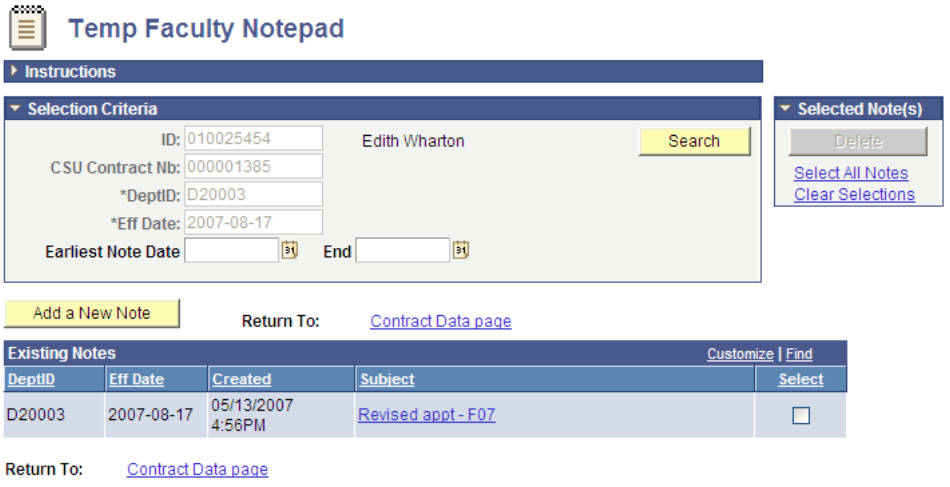
Navigation: CSU Temp Faculty → CSU Contract Data

Processing Steps	Screen Shot																								
<ol style="list-style-type: none"> Click on the Find an Existing Value hyperlink. Enter one or more of the following Search Criteria (e.g. Last Name, Empl ID, Contract Description). Click on the Search button. Select the contract you wish to revise. <p>The Contract Status/Content page displays.</p>	<p>CSU Contract Data Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>Use Saved Search: <input type="text"/></p> <p>EmplID: <input type="text"/> begins with <input type="text"/></p> <p>CSU Contract Number: <input type="text"/> begins with <input type="text"/></p> <p>Department: <input type="text"/> begins with <input type="text"/></p> <p>Contract Status: <input type="text"/> = <input type="text"/></p> <p>Description: <input type="text"/> begins with <input type="text"/></p> <p>Name: <input type="text"/> begins with <input type="text"/></p> <p>Last Name: <input type="text"/> begins with <input type="text"/> WHARTON</p> <p>Second Name: <input type="text"/> begins with <input type="text"/></p> <p><input type="checkbox"/> Include History <input type="checkbox"/> Correct History <input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search Save Search Criteria Delete Saved Search</p> <p>Search Results</p> <p>View All First 1-2 of 2 Last</p> <table border="1"> <thead> <tr> <th>EmplID</th> <th>CSU Contract Number</th> <th>Department</th> <th>Description</th> <th>Contract Status</th> <th>Name</th> <th>Last Name</th> <th>Second Name</th> </tr> </thead> <tbody> <tr> <td>010025454</td> <td>000001385</td> <td>D20003</td> <td>APS 2074 EW</td> <td>Active</td> <td>Edith Wharton</td> <td>WHARTON</td> <td>(blank)</td> </tr> <tr> <td>010025454</td> <td>000001403</td> <td>D20003</td> <td>APS 2082 EW</td> <td>Active</td> <td>Edith Wharton</td> <td>WHARTON</td> <td>(blank)</td> </tr> </tbody> </table>	EmplID	CSU Contract Number	Department	Description	Contract Status	Name	Last Name	Second Name	010025454	000001385	D20003	APS 2074 EW	Active	Edith Wharton	WHARTON	(blank)	010025454	000001403	D20003	APS 2082 EW	Active	Edith Wharton	WHARTON	(blank)
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Navigation: CSU Temp Faculty → CSU Contract Data: Contract Status/Content tab

Processing Steps	Screen Shot
<p>Contract Status/Content Page</p> <p><i>To revise or cancel a contract (after the Transaction Form has been sent to the Dean), you must insert a new contract row:</i></p> <ol style="list-style-type: none"> Click on the + button to insert a new row. The contract data you entered in the previous row will default forward into the new row. Accept the Effective Date default. The Effective Date defaults from the data entered in the previous contract row. If this revision is NOT effective at the beginning of the semester, OVERRIDE with the correct date. 	<p>Contract Status/Content TF Contract Courses TF Contract Total</p> <p>Edith Wharton Person ID: 010025454</p> <p>Contract Status/Content View All</p> <p>CSU Contract #: 000001385 DeptID: D20003</p> <p>*Eff Date: 08/17/2007 Effective Sequence: 1</p> <p>*Contract Status: Active Entitlement: </p> <p>Reg Region: USA Contract Desc: APS 2074 EW</p> <p>Contract Type: 006 Contract Expected End Date: 12/18/2007</p> <p>Approved by: <input type="checkbox"/> Approver1 <input type="checkbox"/> Approver2 <input type="checkbox"/> Approver3 Multi-Year End Date: </p>



Processing Steps	Screen Shot															
<p>3. Change the Effective Sequence</p> <ul style="list-style-type: none">  The Sequence defaults to 0. Every contract revision with the same effective date must have a new sequence number – increase the sequence by 1.  Click on View All on the <u>Contract Status/Content</u> navigation bar to see all previous contract rows and the last sequence #.  The Effective Date and the Effective Sequence work in combination to differentiate each contract revision. One or the other must be different than on the original appointment. If the Effective Date of the revision is different than that of the original appointment, the Effective Sequence remains at 0. (e.g. a lecturer is assigned additional work after the beginning of the semester as a maternity leave replacement. In this case, the effective date of the revision is the date the pay change becomes effective, and the sequence stays at 0.) 	 															
<p>4. Enter a note on the Notepad explaining the reason for the revision.</p>	 <p>Temp Faculty Notepad</p> <p>Instructions</p> <p>Selection Criteria</p> <p>ID: 010025454 Edith Wharton <input type="button" value="Search"/></p> <p>CSU Contract Nb: 000001385</p> <p>*DeptID: D20003</p> <p>*Eff Date: 2007-08-17</p> <p>Earliest Note Date <input type="text"/> End <input type="text"/></p> <p><input type="button" value="Add a New Note"/> Return To: Contract Data page</p> <table border="1"> <thead> <tr> <th colspan="4">Existing Notes</th> <th style="text-align: right;">Customize Find</th> </tr> <tr> <th>DeptID</th> <th>Eff Date</th> <th>Created</th> <th>Subject</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>D20003</td> <td>2007-08-17</td> <td>05/13/2007 4:56PM</td> <td>Revised appt - F07</td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <p>Return To: Contract Data page</p>	Existing Notes				Customize Find	DeptID	Eff Date	Created	Subject	Select	D20003	2007-08-17	05/13/2007 4:56PM	Revised appt - F07	<input type="checkbox"/>
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Processing Steps	Screen Shot
<p>5. Enter a Comment (see standard comments) stating the reason for the revision, e.g. Increase in time base. This will print on the transaction form.</p> <p>Click on the TF Contract Courses tab</p> <p>6. To make changes to <u>Course Assignments</u> and (<u>Other Assignments</u>):</p> <ul style="list-style-type: none"> Click the  to add another course. Click the  to delete a course. <p>7. Continue with corrections to the course assignments, as appropriate.</p> <p>Refer to the Create a Temporary Faculty Contract guide for further instructions and field definitions.</p>	<div data-bbox="592 247 1442 934"> </div> <div data-bbox="592 955 1534 1234"> </div> <div data-bbox="592 1255 1425 1879"> </div>

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

Processing Steps	Screen Shot																																				
<p>TF Contract Total Page</p> <p>Review your revisions. If any data needs to be corrected, return to appropriate page and re-enter.</p> <ol style="list-style-type: none"> 1. Accept the default for the Print flag. 2. Enter the Letter Code: REV This notifies APS to send a revised appointment notification to the lecturer. 3. Click the Save button. Once the contract has been saved, any corrections to this contract row must be done in Correction Mode, using . 4. Click on Add to create other contracts, or on Return to Search to access the main Search page. 5. Print the Transaction Form using either Batch Print or Individual Print (see Guide). After the dept chair approves and signs, give a copy to the lecturer and forward the original to the College. 	<p>The screenshot displays the 'TF Contract Total' page. At the top, there are tabs for 'Contract Status/Content', 'TF Contract Courses', and 'TF Contract Total'. Below this, the user's name 'Edith Wharton' and 'Person ID: 010025454' are shown. The 'Contract Data' section includes 'CSU Contract Number: 000001385', 'DeptID: D20003', 'Eff Date: 08/17/2007', and 'Eff Seq: 1'. A table titled 'Contract Total Detail' contains the following data:</p> <table border="1"> <thead> <tr> <th>Title</th> <th>Dept</th> <th>Dept Name</th> <th>Job Cd</th> <th>Sal Plan</th> <th>Sal Grd</th> <th>Term</th> <th>Comp Rate</th> <th>Pay Decimal</th> <th>Fraction</th> <th>Month Rate</th> <th>Term Rate</th> <th>Total WTU</th> <th>Print</th> <th>Letter Code</th> <th>Date Printed</th> <th>Last Upd DtTm</th> <th>Last Upd By</th> </tr> </thead> <tbody> <tr> <td>LECTURER - AY</td> <td>D20003</td> <td>ACADEMIC PERSONNEL SERVICES</td> <td>2358</td> <td>335</td> <td>3</td> <td>2074</td> <td>3500.000000</td> <td>0.866667</td> <td>13/15</td> <td>3033.330</td> <td>18199.980</td> <td>13.00000</td> <td><input type="checkbox"/></td> <td>REV</td> <td>05/09/2007</td> <td>05/14/2007 3:50:54PM</td> <td>saj</td> </tr> </tbody> </table> <p>Below the table are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. At the bottom, there are buttons for 'Add', 'Update/Display', 'Include History', and 'Print'. A red circle highlights the 'Letter Code' field in the table, and a red arrow points from this circle to a search box in a smaller inset screenshot below. The search box contains the text 'RE' and a magnifying glass icon.</p>	Title	Dept	Dept Name	Job Cd	Sal Plan	Sal Grd	Term	Comp Rate	Pay Decimal	Fraction	Month Rate	Term Rate	Total WTU	Print	Letter Code	Date Printed	Last Upd DtTm	Last Upd By	LECTURER - AY	D20003	ACADEMIC PERSONNEL SERVICES	2358	335	3	2074	3500.000000	0.866667	13/15	3033.330	18199.980	13.00000	<input type="checkbox"/>	REV	05/09/2007	05/14/2007 3:50:54PM	saj
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Cancelled Contracts

To cancel a lecturer's appointment, use the same steps as for a contract revision:

Search for the contract using "Find an Existing Value";

Select the contract to be cancelled.

On the **Contract Content/Status** page:

Top section (*Contract Content/Status*):

- Insert a row with a new effective sequence number (increased by 1 from the previous row).
- Add a note on the **Notepad**, explaining the reason for the cancellation.
- Change the **Contract Status** to **Cancelled**.

Bottom section (*TF Contract Detail*):

- Reduce WTUs to **0**
- In the **Comments** section, enter: "**Cancel appt.**"

On the **TF Contract Total** page, confirm that the WTUs display as "0".

- Enter the **Letter Code** of **CNC** for APS to send the cancelled appointment notification.
- Print and process the transaction form.

Correction Mode

Once the contract is saved, you must be in **Correction Mode** (using ) to update or revise information on the **Contract Status/Content** and **TF Contract Courses** pages.

Correction Mode allows you to overwrite the data you have previously entered. This should be used only to correct data errors before the Transaction Form has been sent to the Dean, or to make changes to course assignments that don't affect pay.

The lecturer's contract record should reflect a history of the initial appointment, and all revisions. When Correct History is used, the original data is lost.

CAUTION: The Correct History button will "gray out" when clicked, to indicate you are working in Correction Mode. You will stay in Correction Mode until you uncheck the Correct History box on the Search page, or until you leave the current session (log out of PeopleSoft).

Once you have made your corrections to the contract, print and process a new transaction form.

If in doubt about whether or not to use correction mode, insert a new row and process your change as a revision.

Change in Course Assignment only

For changes to course or other assignments that do not affect pay, i.e. the total WTUs remain the same, use **Correction Mode**.

On the **Contract Content/Status** page, enter "**Change in assignment only**" in the **Comments** section.

On the **TF Contract Courses** page, add, delete or change course assignments.

On the **TF Contract Total** page, confirm that there is no change to the lecturer's time base and salary.

Print and process the transaction form.

(Note that APS will not send another appointment notification to the lecturer for an assignment change.)



Tables of Valid Values (partial)

Contract Status/Content Page

Contract Status

HSU uses the following 2 values:

Contract Status	Description
Active	This is the default value and should only be changed if an appt is cancelled.
Cancelled	This status is used when you cancel a contract that has already been processed (see Revise Temporary Faculty Contract Guide for more information.)

Comments

The Comments field replaces some of the information formerly entered on the Transaction Form. All Comments will print on the Form. For new contracts, indicate whether the employee is a "new hire" or a "rehired annuitant".

For revised contracts, indicate the reason for the revision, as follows:

Comment	Type	Definition/Use
New hire	New	A new lecturer appt. May have worked on campus previously, (e.g. TA), but is new to the lecturer category. Forward copy of the vita with Transaction Form.
Rehired annuitant	New	Any faculty member (lecturer or tenured) who is being appt'd after retirement (NOT FERP). Total WTUs for the year shall not be more 50% of the WTUs taught in the fiscal year prior to retirement.
Increase in time base, effective xx/xx/xx	Revised	Enter the date that the increase in pay becomes effective, normally the beginning of the semester.
Decrease in time base, effective: xx/xx/xx	Revised	Enter the date that the decrease in pay becomes effective, normally the beginning of the semester. To avoid overpayments to the lecturer, process these as soon as possible, and notify APS.
Cancel Appt	Revised	Reduce WTUs to 0 on the <u>Contract Status/Content</u> page.
Change in assignment only	Revised	Use when course assignment is changed, but the WTUs remain the same – i.e. no change to pay. Use Correct History to change the course assignment.

TF Contract Total Page

Letter Code

Enter a letter code to inform APS which appt notification to send to the lecturer.

Code	Action	Description
NEW	New appt	1 st appt letter for the academic year – for all but 3YR appointments.
3YR	3 year appt	1 st appt letter for the academic year – for 3YR appointments
REV	Revised appt	Revised contract – any change after the 1 st letter.
ADD	Add Spring appt to Fall contract	Add spring assignment to AY appt – for both AY and 3YR appointments.
CNC	Cancelled appt	Cancelled appt – if the initial contract has been processed.
CHX	Special handling	General catch-all for any contract that needs special processing – e.g. no email address. Enter reason on the Notepad.