



CMS Project Management Office

HCM 8.9 Business Process Guide Create a Temporary Faculty Contract

Last Revised: 9/9/2008



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REVISION CONTROL

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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 New Contract**
- Temp Faculty Contract – Batch Print
- Revise Temporary Faculty Contract
- Temp Faculty Contract – Individual Print

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

Business Process Diagram

Business Process diagrams are posted as supporting documents to this guide at the CMS training website.

Process Prerequisites/Assumptions:

Prerequisite/Assumption	Detail
An Empl ID has been created	Employee already has an Empl ID or one has been created through the Add a Person (Person of Interest) process



Processing Steps


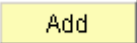



The first step in Creating a New Temp Faculty Contract is to navigate to the correct PeopleSoft page and enter the appointment information for the contract.

Create a New Temp Faculty Contract

The CSU Temporary Faculty Contract Data component is used to process appointment data for lecturers. Once entered, this data is used by the Department to print the Lecturer Transaction Form (LTF), by APS to generate the lecturer’s appointment notification email, and by Payroll to complete the hiring process.

- ❗ To create a contract, the lecturer must have an Empl ID – either an already existing ID, or an ID assigned through the Add a Person (Person of Interest) process in Workforce Administration. See the [Add a Person Guide](#) for more information.
- ❗ This component refers to the temporary faculty “contract”. At HSU, this is the same as the lecturer’s appointment. The “contract” that is printed at the end of this process is still called a Lecturer Transaction Form (LTF). It will be processed the same way as the manually created LTF used in previous years. At the end of the process, the lecturer will still receive an email appointment notification from APS. For our purposes, the “contract” conveys the details of the lecturer’s appointment for the hire process.
- ❗ If viewing this Guide on-line, you can access tables and documents with the hyperlinks.

Navigation: CSU Temp Faculty → CSU Contract Data

Processing Steps	Screen Shot
<ol style="list-style-type: none"> 1. Click on the Add a New Value hyperlink. 2. Enter Empl ID. Use the  to search by name for the Empl ID. 3. Accept the default CSU Contract Number “NEW” (grayed out). This number is assigned by the system. See Contract Description (below) for HSU contract number. 4. Enter the Department number, e.g. D20003 5. Click on the  button. 	 <p>CSU Contract Data</p> <p>Find an Existing Value Add a New Value</p> <p>EmplID: <input type="text" value="010025623"/> </p> <p>CSU Contract Number: <input type="text" value="NEW"/></p> <p>Department: <input type="text" value="D20003"/> </p> <p><input type="button" value="Add"/></p> <p>Find an Existing Value Add a New Value</p>



Contract Status/Content Page Steps

Use the Contract Status/Content page to enter basic information about the lecturer's appointment, including the beginning and ending dates, type of appointment, compensation, position number, term, WTUs and any comments.

Note: Because of your security access, you are limited to creating contracts only for your department(s).

- ❗ Contracts are created one semester at a time. For an academic year appt, you first create the contract for fall semester. At a later date, you will add the contract for spring semester. The **Contract Type** is used to define the type of appt.
- ❗ Once the contract is saved, you must be in **Correction Mode** (using **Correct History**) to update or revise information on the **Contract Status/Content** pages.
- ❗ Detailed information about each field is provided in the **Field Definitions** section at the end of this Guide.

*** This guide is written for creating lecturer contracts. Fields with *** indicate special instructions for FERP, TA and GA contracts, found on Page 6 – Special Instructions for FERP, GA and TA Appointments.






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

Processing Steps	Screen Shot
<p>Contract Status Content:</p> <ol style="list-style-type: none"> 1. Enter the Effective Date*** for the start of the temporary appointment, normally, the first day of the semester. <ul style="list-style-type: none"> ➢ 8/18/2008- Fall; 1/14/2009-Spr ❗ The Effective Date defaults to the current date. Override it by manually entering the correct date, if necessary. 2. Accept the Effective Sequence default of 0. 3. Enter the Contract Description*** ❗ The format for the HSU Contract Description = SUBJ* AY Lecturer's Initials. <ul style="list-style-type: none"> ➢ BIOL 0708 LMA ➢ ENGL 0708 ED *see "Position Number" table 4. Accept the default Contract Status of "Active". <ul style="list-style-type: none"> ❗ HSU uses only "Active" or "Cancelled" 5. Enter the Entitlement WTUs for lecturers with either an AY or 3YR appt = Total WTUs for the year. Format = ##.# <ul style="list-style-type: none"> ➢ 12.3. 6. Enter the Contract Expected End Date*** for this appt. <ul style="list-style-type: none"> ❗ Normally, this is the end of the semester or the end of the academic year, depending on the type of appt. <ul style="list-style-type: none"> ➢ Fall only appt - 12/22/2008; ➢ AY appt – 5/21/2008. 	<p>The screenshots show the 'Contract Status/Content' page for Sylvia Plath (Person ID: 010025623). The top screenshot shows the 'Contract Status/Content' tab with fields for CSU Contract # (000001406), Eff Date (08/17/2007), Contract Status (Active), Entitlement (23.5), and Contract Expected End Date (05/21/2008). A red arrow points to the 'Contract Status' dropdown menu. The bottom screenshot shows the same page with the 'Contract Status' dropdown set to 'Active'.</p>



Processing Steps	Screen Shot
<p>7. Accept the Regulatory Region default of "USA".</p> <p>8. Enter the Multi-Year End Date (for 3YR appts only). This is the end date of a lecturer's 3 year appt. Format = 5/15/####. > 5/15/2010 - for lecturer in 2nd yr of 3 yr appt. > In 3rd year, change the Multi-Year End Date to the same date as Contract End Date.</p> <p>See Contract Dates for 2008-09</p> <p>9. Enter the Contract Type.*** > 003 for AY entitlement. Click on for a list of values. For incumbent lecturers, refer to your dept's "Lecturer Entitlement Worksheet" for the type of appt.</p> <p>10. Skip the Approved by boxes – HSU does not use.</p>	<p>Sylvia Plath Person ID: 010025623</p> <p>Contract Status/Content View All 1 of 1</p> <p>CSU Contract #: 000001406 DeptID: D20003</p> <p>*Eff Date: 08/17/2007 Effective Sequence: 0 Contract Desc: APS 0708 SP</p> <p>*Contract Status: Active Entitlement: 23.5 Contract Expected End Date: 05/21/2008</p> <p>Reg Region: USA Multi-Year End Date: 05/15/2010</p> <p>Contract Type: 014 12.12 Entitlement - Yr 1 of 3</p> <p>Approved by: <input type="checkbox"/> Approver1 <input type="checkbox"/> Approver2 <input type="checkbox"/> Approver3</p>
<p>TF Contract Detail:</p> <p>11. Enter the Position Number*** This is the dept's pool position # for part-time lecturers, or the dept's 3YR position # for part-time 3YR lecturers. All full-time lecturers have unique position #s. See the "Position Number" table on the APS website. The position # will automatically populate the Business Unit, Department, Job Code, and Sal Plan/Grade.</p> <p>12. Check the Salary Grade ***= the lecturer's range. The default is a "standard" value assigned to the pool position #. VERRIDE, if necessary, by manually entering the lecturer's range. If unknown, accept the default value.</p> <p>13. Enter the Term for the contract. Term number = unique four digit code to designate year and semester, similar to Banner. > 2084 = Fall 2008 > 2092 = Spring 2009</p>	<p>Sylvia Plath Person ID: 010025623</p> <p>Contract Status/Content View All 1 of 1</p> <p>CSU Contract #: 000001406 DeptID: D20003</p> <p>*Eff Date: 08/17/2007 Effective Sequence: 0 Contract Desc: APS 0708 SP</p> <p>*Contract Status: Active Entitlement: 23.5 Contract Expected End Date: 05/21/2008</p> <p>Reg Region: USA Multi-Year End Date: 05/15/2010</p> <p>Contract Type: 014 12.12 Entitlement - Yr 1 of 3</p> <p>Approved by: <input type="checkbox"/> Approver1 <input type="checkbox"/> Approver2 <input type="checkbox"/> Approver3</p> <p>TF Contract Detail Find View All First 1 of 1 Last</p> <p>*Position Nbr: 00022367 LECTURER AY / 3 YEAR Bus. Unit: HMCMP HSU</p> <p>Department: D20003 ACADEMIC PERSONNEL SERVICES Job Code: 2358 Sal Plan/Grd: 335 / 3</p> <p>Term: 2074 Cycle: 1 *Comp Rate: 4253.000000</p> <p>*Late Start? N Academic Days Paid: Total WTU: 9.50000</p> <p>Comments: Rehired annuitant</p> <p>Save Return to Search Notify Add Update/Display Include History</p> <p>Contract Status/Content TF Contract Courses TF Contract Total</p> <p>Approved by: <input type="checkbox"/> Approver1 <input type="checkbox"/> Approver2 <input type="checkbox"/> Approver3</p> <p>TF Contract Detail Find View All First 1 of 1 Last</p> <p>*Position Nbr: 00022367 LECTURER AY / 3 YEAR Bus. Unit: HMCMP HSU</p> <p>Department: D20003 ACADEMIC PERSONNEL SERVICES Job Code: 2358 Sal Plan/Grd: 335 / 3</p> <p>Term: 2074 Cycle: 1 *Comp Rate: 4253.000000</p> <p>*Late Start? N Academic Days Paid: Total WTU: 9.50000</p> <p>Comments: Rehired annuitant</p>



Processing Steps	Screen Shot
<p>14. Accept the Cycle default of "1".</p> <p>15. Enter the Comp Rate = Full time Salary Rate (Base Pay)</p> <p> The Compensation Rate will be multiplied by the time base fraction (derived from the total WTUs) to calculate the monthly salary rate. (The monthly salary rate will display on the TF Contract Total page.)</p> <p> If Comp Rate is unknown, enter 1.00. After salary evaluation, College staff will enter the correct rate.</p> <p>16. Accept the Late Start? Default of "N"</p> <p> See Field Definitions for appts that start after the beginning of the semester.</p> <p>17. Skip Total WTU</p> <ul style="list-style-type: none"> The Total WTU field will populate based on the courses that are entered on the TF Contract Courses page. <p> NOTE: Total WTUs may never be greater than 15.0. If a lecturer is doing a voluntary overload, overwrite this number to 15.0</p> <p>18. Enter Comments, if applicable, for either "New hire" or "Rehired annuitant". (Also used for revisions.)</p> <p>Comments will print on the LTF</p> <p>Click the TF Contract Courses tab at the top of the page.</p>	 <p>The screenshot shows the 'TF Contract Detail' form. Key fields include: <ul style="list-style-type: none"> Position Nbr: 00022367 (LECTURER AY / 3 YEAR) Bus. Unit: HMCMP HSU Department: D20003 ACADEMIC PERSONNEL SERVICES Job Code: 2358 Sal Plan/Grd: 335 / 3 Term: 2074 Cycle: 1 *Comp Rate: 4253.000000 *Late Start?: N Academic Days Paid: (empty) Total WTU: 9.50000 Comments: Rehired annuitant </p>



Special Instructions for FERP, GA and TA appointments:

Field	Instructions
<p>Effective Date:</p> <p>Contract Description:</p> <p>Contract Expected End Date:</p> <p>Contract Type:</p> <p>Position Number:</p> <p>Salary Grade:</p>	<p>FERP and TA: same as lecturer dates – beginning of semester GA: Fall = 9/1/2008; Spring = 1/1/2009</p> <p>Same as for Lecturers (SUBJ Term Initials) with the additional identifier, as follows: FERP: Use FP prior to the contract description to designate a FERP appt ➤ FP ENGL 0809 ABC TA: Use TA prior to the contract description to designate a Teaching Assoc appt ➤ TA BIOL 0809 ABC GA: Use GA prior to the contract description to designate a Graduate Asst appt ➤ GA KRA 0809 ABC</p> <p>FERP and TA: same as lecturer dates – end of semester or end of academic year GA: Fall = 1/29/2009; Spring = 6/30/2009</p> <p>FERP, TA and GA: Only 2 contract types are used: ➤ 006 (1 semester appt) ➤ 001 (academic year appt)</p> <p>FERP, TA and GA: Use the dept's pool position number for each of these appts. (See the Position Number table on the APS web site, or use the look-up feature.)</p> <p>FERP: Use rank at time of retirement (override if necessary) ➤ 4 (Associate Prof) ➤ 5 (Professor) TA and GA: ➤ 1 (should default in from the position number – double check)</p> <p>All other steps to enter contract data for FERP faculty, Teaching Associates, and Graduate Associates are identical to those for Lecturers. This includes the use of the same letter codes, use of the Notepad, and use of the Comments box to record new hires or changes to timebase, etc.</p>



TF Contract Courses Page Steps

Use this page to enter the lecturer's course assignments and any non-teaching assignments (Assigned Time) to generate the total WTUs for the appt.

- The information listed at the top of this page is for display purposes only and comes from the information entered on the **Contract Status/Content** page.

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

Processing Steps	Screen Shot																																																				
<p>Course Assignments:</p> <ul style="list-style-type: none"> HSU does not use all of these fields. The WTUs do not automatically calculate when you enter units and # of sections. You must manually enter these values. <ol style="list-style-type: none"> Skip Class Nbr. Enter Subject Area. <ul style="list-style-type: none"> APS, ENGL, PSCI, ENRS Enter Catalog Number = course number. <ul style="list-style-type: none"> 105, 306 Enter Description (OPTIONAL). e.g. can be used to differentiate special topics courses, if desired. Enter Section # = number of sections of this course <ul style="list-style-type: none"> "3" for 3 sections of BIOL 110. K, S – K-factor. Defaults as K. Change to S if supervised instruction course. <p>Supervised instruction courses must be entered on the first rows of the course assignment section.</p> Enter Class Units = Either the Student Credit Units, OR "per student" unit values for supervised instruction. <ul style="list-style-type: none"> .33 for 499; .50 for 699 If an S-factor course is entered, the Students box will display. Enter Students = Enrollment, only for S-factor courses. Enter WTU = Student Credit Units multiplied by mode of instruction (K-factor). <ul style="list-style-type: none"> ENGL 050 = 3.9 WTUs (3.0 SCUs x 1.3 K-factor) for remedial instruction. 	<p>The screenshot shows the 'TF Contract Courses' page for Sylvia Plath (Person ID: 010025623). It displays contract details for CSU Contract Number 000001406, DeptID D20003, Eff Date 08/17/2007, and Sequence 0. The position is LECTURER AY / 3 YEAR at HMCMP. The course assignments table lists three rows:</p> <table border="1"> <thead> <tr> <th>Class Nbr</th> <th>Subject Area</th> <th>Catalog Nbr</th> <th>Description</th> <th>Section</th> <th>K / S</th> <th>K Factor</th> <th>Units</th> <th>#Students</th> <th>WTU</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>APS</td> <td>690</td> <td></td> <td>1</td> <td>S</td> <td></td> <td>0.50</td> <td>3.00</td> <td>1.500000</td> </tr> <tr> <td>2</td> <td>APS</td> <td>300</td> <td></td> <td>1</td> <td>K</td> <td></td> <td>3.00</td> <td></td> <td>3.000000</td> </tr> <tr> <td>3</td> <td>APS</td> <td>400</td> <td></td> <td>2</td> <td>K</td> <td></td> <td>2.00</td> <td></td> <td>4.000000</td> </tr> </tbody> </table> <p>The 'Other Assignments' table shows one row:</p> <table border="1"> <thead> <tr> <th>Assignment Type</th> <th>Reason Code</th> <th>Time Source Code</th> <th>Academic Org/Dept</th> <th>WTU</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>11</td> <td></td> <td>Department</td> <td></td> <td>1.000000</td> <td>APS 300 enrollment=92</td> </tr> </tbody> </table>	Class Nbr	Subject Area	Catalog Nbr	Description	Section	K / S	K Factor	Units	#Students	WTU	1	APS	690		1	S		0.50	3.00	1.500000	2	APS	300		1	K		3.00		3.000000	3	APS	400		2	K		2.00		4.000000	Assignment Type	Reason Code	Time Source Code	Academic Org/Dept	WTU	Description	11		Department		1.000000	APS 300 enrollment=92
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
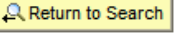
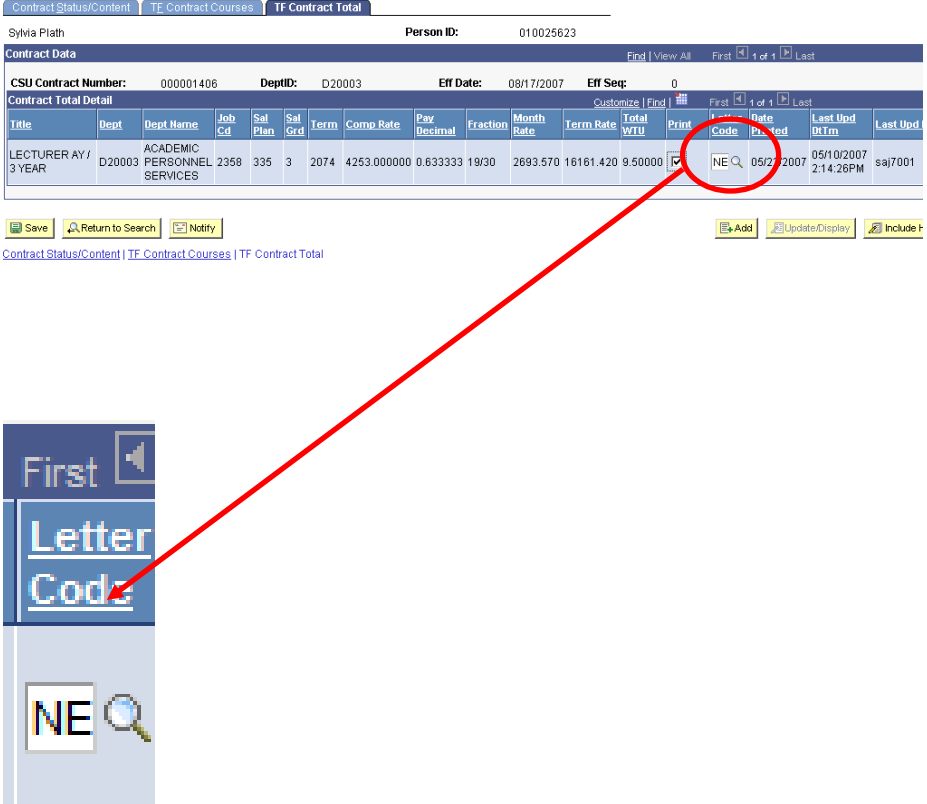
Processing Steps	Screen Shot
<p> WTUs can now be entered with 2 decimal places, e.g. 3.25.</p> <p> The total of the WTUs entered here will populate the WTU field on the Contract Status/Content page and on the TF Contract Total page.</p> <p style="text-align: right;">New</p> <p>10. Click the to add another course. Click the to delete a course.</p> <p>Other Assignments:</p> <p> If appt includes Assigned Time, complete the following: <i>HSU does not use all of these fields.</i></p> <p>11. Enter Assignment Type = Assigned Time code (for FAD) ➢ 11 for Excess Enrollment.</p> <p> Use the to search for values or see the Assigned Time Codes on the APS web site.</p> <p>12. Skip Reason Code.</p> <p>13. Enter Time Source Code = funding level. Use drop down box to select correct value.</p> <p>14. Skip Academic Org/Dept.</p> <p>15. Enter WTU value The WTUs entered here will be added to the WTUs entered in the Course Assignments section, and will populate the WTU field on the Contract Status/Content page and on the TF Contract Total page.</p> <p>16. Enter Description of assignment. ➢ GEOG 200 enrollment = 78</p> <p>Click the TF Contract Total Tab on the top of the page.</p>	<p>The screenshot shows the 'TF Contract Courses' tab. At the top, it displays 'Sylvia Plath' and 'Person ID: 010025623'. Below this are sections for 'Contract Data', 'Contract Detail', 'Course Assignments', and 'Other Assignments'. The 'Contract Detail' section shows information like 'Position Nbr: 00022367', 'Department: D20003', and 'Total WTU: 9.50000'. The 'Course Assignments' table has columns for Class Nbr, Subject Area, Catalog Nbr, Description, Section, K/S, K Factor, Units, #Students, and WTU. The 'Other Assignments' table has columns for Assignment Type, Reason Code, Time Source Code, Academic Org/Dept, WTU, and Description. A red arrow points from the 'Reason Code' field in the 'Other Assignments' table to the 'Reason Code' field in the 'Other Assignments' table below it.</p>

TF Contract Total Page Steps


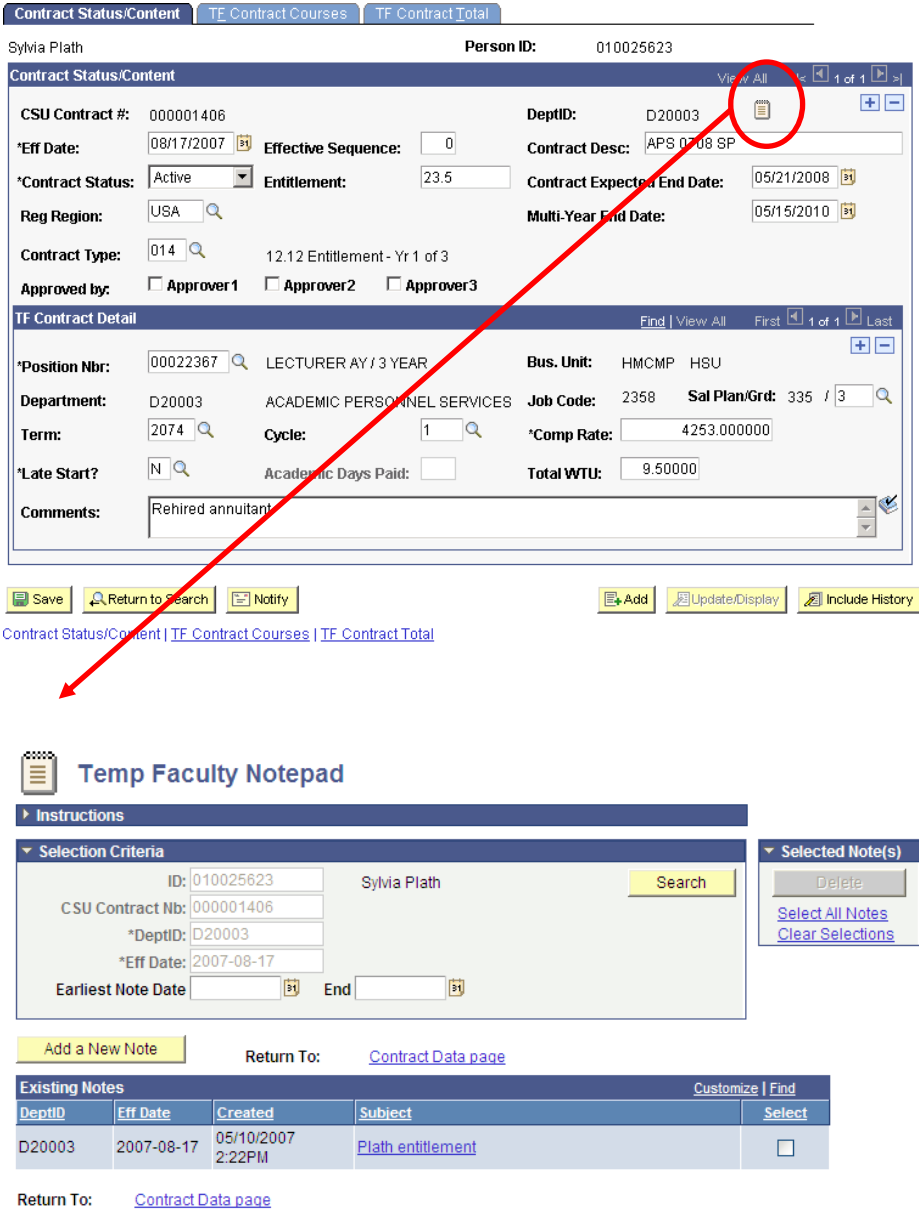
Use this page to review all of the contract information entered and to prepare the record for printing the transaction form. Contracts may be printed either in a "batch", as a group, e.g. for the initial appt process, or individually, e.g. for a revised contract.

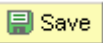
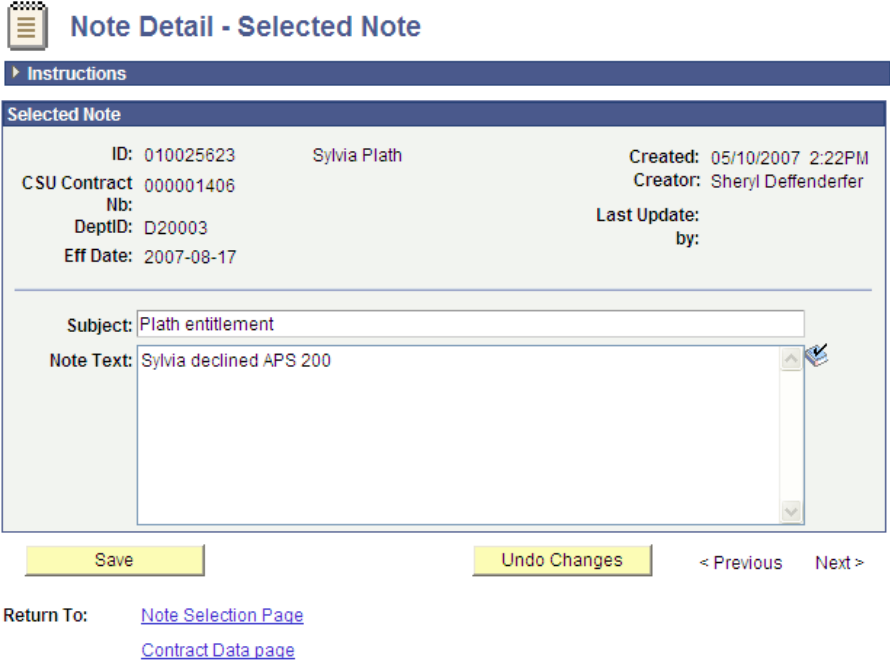
- The information listed at the top of this page is for display purposes only and is populated based on the information entered on the other pages in this contract.

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

Processing Steps	Screen Shot																																				
<p>Upon review, if any data needs to be corrected, return to appropriate page and re-enter.</p> <ol style="list-style-type: none"> Accept the default for the Print flag. Enter the Letter Code The Letter Code is used by APS to determine which type of appt notification to send the lecturer – it does NOT refer to the lecturer's appt status. See table for codes. Click the  button. Once the contract has been saved, any revisions must be done in Correction Mode, using . Click on Add  to create other contracts, or on Return to Search  to access the main Search page. Print the contract (LTF) 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 shows the 'TF Contract Total' page for Sylvia Plath (Person ID: 010025623). The 'Contract Data' section shows CSU Contract Number: 000001406, DeptID: D20003, Eff Date: 08/17/2007, and Eff Seq: 0. The 'Contract Total Detail' table lists the contract as 'LECTURER AY / 3 YEAR' with a 'Letter Code' of 'NE'. A red circle highlights the 'Letter Code' field, and a red arrow points from it to a 'Letter Code' search box in the bottom left of the screenshot.</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>Rate</th> <th>Last Upd DtTm</th> <th>Last Upd</th> </tr> </thead> <tbody> <tr> <td>LECTURER AY / 3 YEAR</td> <td>D20003</td> <td>ACADEMIC PERSONNEL SERVICES</td> <td>2358</td> <td>335</td> <td>3</td> <td>2074</td> <td>4253.000000</td> <td>0.633333</td> <td>19/30</td> <td>2693.570</td> <td>16161.420</td> <td>9.500000</td> <td><input checked="" type="checkbox"/></td> <td>NE</td> <td>05/27/2007</td> <td>05/10/2007 2:14:26PM</td> <td>saj7001</td> </tr> </tbody> </table>	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	Rate	Last Upd DtTm	Last Upd	LECTURER AY / 3 YEAR	D20003	ACADEMIC PERSONNEL SERVICES	2358	335	3	2074	4253.000000	0.633333	19/30	2693.570	16161.420	9.500000	<input checked="" type="checkbox"/>	NE	05/27/2007	05/10/2007 2:14:26PM	saj7001
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	Rate	Last Upd DtTm	Last Upd																				
LECTURER AY / 3 YEAR	D20003	ACADEMIC PERSONNEL SERVICES	2358	335	3	2074	4253.000000	0.633333	19/30	2693.570	16161.420	9.500000	<input checked="" type="checkbox"/>	NE	05/27/2007	05/10/2007 2:14:26PM	saj7001																				



Processing Steps	Screen Shot										
<p>Notepad Feature:</p> <ul style="list-style-type: none"> After saving the contract, the Notepad icon will appear on the <u>Contract Status/Content</u> page. A brief note, information about the apt, may be entered here. The note will not be printed on the LTF. Each note contains the name of the creator, the date and the time the note was created. <p>6. Click on the  icon.</p> <p>7. Click on Add a New Note to open up note page.</p>	 <p>Contract Status/Content TF Contract Courses TF Contract Total</p> <p>Sylvia Plath Person ID: 010025623</p> <p>Contract Status/Content View All 1 of 1</p> <p>CSU Contract #: 000001406 DeptID: D20003</p> <p>*Eff Date: 08/17/2007 Effective Sequence: 0 Contract Desc: APS 0708 SP</p> <p>*Contract Status: Active Entitlement: 23.5 Contract Expected End Date: 05/21/2008</p> <p>Reg Region: USA Multi-Year End Date: 05/15/2010</p> <p>Contract Type: 014 12.12 Entitlement - Yr 1 of 3</p> <p>Approved by: <input type="checkbox"/> Approver1 <input type="checkbox"/> Approver2 <input type="checkbox"/> Approver3</p> <hr/> <p>TF Contract Detail Find View All First 1 of 1 Last</p> <p>*Position Nbr: 00022367 LECTURER AY / 3 YEAR Bus. Unit: HMCMP HSU</p> <p>Department: D20003 ACADEMIC PERSONNEL SERVICES Job Code: 2358 Sal Plan/Grd: 335 / 3</p> <p>Term: 2074 Cycle: 1 *Comp Rate: 4253.000000</p> <p>*Late Start? N Academic Days Paid: Total WTU: 9.50000</p> <p>Comments: Rehired annuitant</p> <p style="text-align: center;"> <input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> </p> <p style="text-align: center;"> Contract Status/Content TF Contract Courses TF Contract Total </p> <p>Temp Faculty Notepad</p> <p>Instructions</p> <p>Selection Criteria</p> <p>ID: 010025623 Sylvia Plath <input type="button" value="Search"/></p> <p>CSU Contract Nb: 000001406</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 style="text-align: right;">Selected Note(s)</p> <p style="text-align: right;"><input type="button" value="Delete"/></p> <p style="text-align: right;">Select All Notes</p> <p style="text-align: right;">Clear Selections</p> <p style="text-align: center;"><input type="button" value="Add a New Note"/> Return To: Contract Data page</p> <p>Existing Notes Customize Find</p> <table border="1"> <thead> <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>05/10/2007 2:22PM</td> <td>Plath entitlement</td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> <p>Return To: Contract Data page</p>	DeptID	Eff Date	Created	Subject	Select	D20003	2007-08-17	05/10/2007 2:22PM	Plath entitlement	<input type="checkbox"/>
DeptID	Eff Date	Created	Subject	Select							
D20003	2007-08-17	05/10/2007 2:22PM	Plath entitlement	<input type="checkbox"/>							

Processing Steps	Screen Shot
<p>8. Enter any notes about the appt., e.g. why an entitlement was not met, especially if the lecturer declined work.</p> <ul style="list-style-type: none">➤ Maternity leave replacement for Louisa May Alcott.➤ Lecturer declined APS 500 for fall semester. <p>9. Click .</p> <p>10. Click on <u>Contract Data</u> page hyperlink to return to the contract. The notepad icon now displays "lines" indicating that a note has been added to this contract.</p>	 <p>Note Detail - Selected Note</p> <p>Instructions</p> <p>Selected Note</p> <p>ID: 010025623 Sylvia Plath Created: 05/10/2007 2:22PM CSU Contract Nb: 000001406 Creator: Sheryl Deffenderfer DeptID: D20003 Last Update: by: Eff Date: 2007-08-17</p> <p>Subject: <input type="text" value="Plath entitlement"/></p> <p>Note Text: <input type="text" value="Sylvia declined APS 200"/></p> <p><input type="button" value="Save"/> <input type="button" value="Undo Changes"/> < Previous Next ></p> <p>Return To: Note Selection Page Contract Data page</p>



Tables of Valid Values

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.)

Contract Type

The Contract Type field is used to identify the type of appointment and entitlement, if applicable. Although contracts are built one semester at a time, the appointment **MUST** correspond to the lecturer's entitlement. This is done by entering appt begin and end dates for the academic year and by choosing the appropriate contract type.

Contract Type	Description
001	Academic Year Appointment (no entitlement)
003	12.3 Entitlement (Academic Year entitlement)
006	Semester Appointment
010	Summer Session Appointment
014	12.29 Entitlement - Yr 1 of 3 (1 st year of 3 year appointment)
015	12.29 Entitlement - Yr 2 Of 3 (2 nd year of 3 year appointment)
016	12.29 Entitlement - Yr 3 Of 3 (3 rd year of 3 year appointment)

Contract Dates for 2008-09

Duration of Appointment	Contract Type	Appointment Begin and End Dates
Fall semester only	006	8/18/2008 - 12/22/2008 GA: 9/1/2008 – 1/29/2009
Spring semester only	006	1/14/2009 - 5/20/2009 GA: 1/1/2009 – 5/29/2009
Academic Year	001: no entitlement 003: entitlement	8/18/2008 - 5/20/2009 GA: 9/1/2009 – 6/30/2009
3 Year - 1 st year	014	8/18/2008 - 5/15/2011 (if appt starts in fall) 1/14/2009 - 5/15/2011 (if appt starts in spring)
3 Year - 2 nd year	015	8/18/2008 - 5/15/2010 (if appt starts in fall) 1/14/2009 - 5/15/2010 (if appt starts in spring)
3 Year - 3 rd year	016	8/18/2008 - 5/20/2009 (if appt starts in fall) 1/14/2009 - 5/20/2009 (if appt starts in spring)



Salary Grade

These values correspond to the Lecturer’s salary range (and “rank”).

Grade/Range	Appointment Level	
1	Lecturer L	TA and GA: All
2	Lecturer A	
3	Lecturer B	
4	Lecturer C	FERP: Associate Professor
5	Lecturer D	FERP: Professor

Comments

The Comments field replaces some of the information formerly entered on the LTF. All Comments will print on the LTF. For new contracts, indicate whether the lecturer 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 LTF.
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 (AY) 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. Delete the course assignment on the <u>Courses</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 Courses Page

Other Assignments (Assigned Time):

Time Source Code

This value identifies the level at which the assigned time is being “funded”. It is especially important to identify any outside funding – e.g. Reimbursement for grant funded projects.

Time Source Code (Funding Level)
Chancellor
College
Department
University (and Academic Affairs)
Lottery
Reimbursement



TF Contract Total Page

Letter Code

Enter a letter code to inform APS which appt notification to send to the lecturer. (See the Revise Temporary Faculty Contract Guide for more information.)

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.

Reminder: this refers to the letter that will be sent to the lecturer; not to the lecturer's appointment status. For example, the first letter each fall semester will either be NEW or 3YR, whether or not the lecturer is continuing from the previous year, or a brand new lecturer.



Field Definitions

Contract Status/Content Page

Field	Definition
Name	Name of the person. Automatically populates based on the Empl ID entered on the Add a New Value page.
Person ID	Same as Empl ID. For new hires, this is a unique employee identification number assigned by the system when the Person of Interest personal data record is created.
Contract Number	The unique contract number, automatically assigned by the system when the contract is saved. (The Contract # will display as "NEW" until the contract is completed and saved.)
DeptID	The PeopleSoft department number – D2xxxx
Notepad	Any brief 'notes' about the contract. Notes can only be added after the contract is saved. (The Notepad icon will not appear until the contract is completed and saved.) Use to communicate information to the College and/or APS and to document information about the assignment.
Effective Date	The start date of the temporary appointment (when the contract becomes or became <u>effective</u> .) Normally this is the first date of the semester. GA appt dates are different than lecturer dates – see Special Instructions.
Effective Sequence	The sequence number. Defaults to 0 for new appts. You will increase this number by '1' for every contract revision on the same effective date, e.g. decrease in time base that is effective from the beginning of the semester would have an effective date of 8/18/2008 (same as the original contract) and a sequence number of '1'. The sequence number identifies this revision as a change to the appt. (Also see Revise Temporary Faculty Contract Guide for more info about the use of sequence numbers.)
Contract Desc	Contract description. The HSU format is: "SUBJ (in caps) AY Lecturer's Initials". For example ENGL 0809 LMA – English department ; appointment during the 2008/09 academic year; initials FERP, TA and GA appts: Use appropriate designation before the contract description (see Special Instructions).
Contract Status	Status of the contract. Defaults in as 'Active'. See Contract Status Values .
Entitlement	The total entitlement WTUs for lecturers with either a 3 YR or Academic Year entitlement. The entitlement is expressed as total WTUs for the year, using 1 decimal place: ##.# . (For incumbent lecturers, refer to your dept's APS "Lecturer Entitlement Eligibility Worksheet" for WTUs.)
Contract Expected End Date	The end date of the temporary appt for the current academic year. Normally, this is the last date of the semester (for one semester appts), or of the academic year (for AY appts.) For lecturers with an entitlement to an academic year appt, the expected end date MUST be the last date of the academic year. If there is no work for a spring appt, the appt will be cancelled. GA appt dates are different than lecturer dates – see Special Instructions.
Reg Region	The Regulatory Region – defaults as 'USA' – ignore.
Multi-Year End Date	For lecturers with 3 YR appts only. The approximate end date of the 3 year appt period. It is expressed as 5/15/xxxx. In the 3 rd year of the appt, this date must be changed to match the Contract Expected End Date.
Contract Type	Identifies the type of appt and the entitlement, if applicable. See Contract Type Values .
Approved by	Ignore – not used by HSU.
Position Number	The dept's PT pool position # for "non-3YR" <u>part-time</u> lecturers or the dept's 3YR pool position # for <u>part-time</u> 3YR lecturers (See Dept Position Number table on the APS web site); OR , a unique position # for all <u>full-time</u> lecturers – check Job Data for incumbent lecturers, or Form 210 for newly recruited lecturers. Note: Be sure to use the 3YR position # for newly qualified 3YR lecturers. FERP, TA and GA: Depts have a separate pool position # for each of these appt types. See Dept Position Number table or use lookup feature on contract page.
Business Unit	Ignore – automatically populates when the position # is entered.
Department	Ignore – automatically populates when the position # is entered. (But, if it's not your dept #, you've probably entered the wrong position number! – check again.)



Field	Definition
Job Code	Ignore – automatically populates when the position # is entered.
Salary Plan/Grade	CHECK! – a default grade (same as lecturer range) that automatically populates when the position # is entered. The Salary Grade is a “generic” value assigned to the position #. You need to enter the correct salary grade that corresponds to the lecturer’s range. See Salary Plan and Grade Valid Values. If unknown (e.g. new hire) leave as the default – after the salary evaluation, College staff will correct. FERP: use rank before retirement; TA and GA: use 1. See Special Instructions.
Term	The semester of the appt – a unique four-digit code made up of the year and semester, e.g. 2084 for Fall 2008, 2092 for Spring; similar to Banner – 4 = Fall; 2 = Spring; 3 = Summer.
Cycle	Defaults in as ‘1’. The cycle can be used to divide the semester into segments. HSU uses only ‘1’.
Comp Rate	The lecturer’s full-time monthly salary rate. If unknown, enter 1.00. After the salary evaluation, College staff will correct. Whenever a row is added to the contract (because of a revision or the addition of a Spring appt) the comp rate will automatically update from the current rate in Job Data, reflecting any salary increases since the last contract.
Late Start?	Defaults in as ‘N’ for None – starting at the beginning of the academic year. In special circumstances, this is used for an appt that begins after the start of the term. (e.g. maternity leave replacement or student teacher supervisor). For these appts, select “L” for Late start.
Academic Days Paid	This field ungrays when the Late Start value is chosen in the Late Start field. Enter the number of academic days from the beginning date of the appt to the end of the semester for which the lecturer should be paid.
Total WTU	The total weighted teaching units of the appt. This will populate based on the course assignments and assigned time entered on the TF Courses page. NOTE: If lecturer is carrying a voluntary overload, overwrite WTUs on front page with 15.0. An appt can never be greater than 1.0 or 15 WTUs.
Comments	Free form text field used to identify new hires, rehired annuitants, and revisions to the appt. This is different than the information entered on the Notepad. See Comments for standard entries.

TF Contract Courses Page

Note: this section is designed to pull data from the course schedule, once we integrate our PeopleSoft Student system. For now, manually enter the course assignment data, as indicated:

Field	Definition
Class Number	Ignore – HSU does not use.
Subject Area	Course subject area, as listed in Banner and the schedule of classes, e.g. WLDF
Catalog Number	Course number, as listed in Banner and the schedule of classes, e.g. 101, 310A
Description	OPTIONAL. Can be used for a course title, e.g. Special Topics courses.
Section	Number of sections of this course assigned to the lecturer
K/S	Defaults in as ‘K’. Change to ‘S’ if for a supervised instruction course in which the WTUs are calculated based on the enrollment, e.g. 499, 690, 699
K Factor	Ignore – HSU does not use.
Units	Student Credit Units for the course. The number of units students receive for the course.
# Students	This field will display if an ‘S’ factor course is entered. Used only with ‘S’ factor courses. The number of students enrolled (or anticipated to be enrolled.) Used to calculate WTUs.
WTU	The total WTUs for each course entered. This field does not automatically calculate the value. You must enter it manually. WTUs equal the Student Credit Units multiplied by the K (or S) factor and then multiplied by the number of sections assigned. Generally for lecture classes, the K factor is 1, so the WTUs and the SCUs are the same. In some cases, e.g. remedial or lab instruction, the K factor is greater than 1. Check the SCACRSE in Banner if you’re unsure of the K factor.
Assignment Type	Assigned Time code used for FAD reporting.
Reason Code	Ignore. HSU doesn’t use at this time.



Field	Definition
Time Source Code	The funding source of the assigned time. See Time Source Code Values
Academic Org	Ignore – HSU doesn't use at this point.
Description	Description of the assignment. For "excess enrollment" assigned time, enter the class and the enrollment, e.g. RS 300, enrollment = 83

TF Contract Total Page

Field	Definition
Comp Rate	The lecturer's full-time monthly salary rate
Pay Decimal	FTEF. Calculated by dividing the total WTUs by 15. Used to compute Monthly Rate
Fraction	Pay fraction. Calculated by dividing the total WTUs by 15. Used in the PIMS system to generate pay.
Total WTU	Populated from the assigned WTUs entered on the TF Courses page.
Monthly Rate	Monthly salary. Calculated by multiplying the full-time monthly salary rate by the Pay Decimal.
Term Rate	Total pay for the semester. Calculated by multiplying the Monthly Rate by the Number of Pay Months. Fall semester = 6 pay months (Sept. – Dec.; the last 2 payments are in the following July and Aug.) Spring semester = 6 pay months (Jan. – June.)
Letter Code	Identifies which appt notification APS will send to the lecturer. See Letter Code Values.
Date Printed	The date the Contract (LTF) is printed. Updates automatically every time the contract is printed.
Last Upd DtTm	The time the contract was last updated. Will not update if changes to the contract are made using Correct History.
Last Upd By	Identifies the last user who made a change to the Contract. Displays the userid and the date stamp. Will not update if changes to the contract are made using Correct History.

Suggested My Favorites Additions

Process Step	Screen Shot
<p>Suggested additions to "My favorites" when creating Temporary Faculty Contracts.</p>	<p>The screenshot shows the PeopleSoft interface with a 'Menu' window open. The 'My Favorites' section is expanded, showing a list of items: CSU ID Search, Add a Person, Contracts, Contract Batch Print, Contract Individual Print, Add to Favorites, and Edit Favorites. A red arrow points from the top screenshot to the bottom one, indicating the addition of these items to the 'My Favorites' list.</p>