Completing Personnel Transaction Reports (PTRs)

Required fields within each section:

1. **Employee Information**
   - Completed by the employee or the department representative - **required**
   - SS # will be filled out by the new hire at orientation
   - CWID - **required**

2. **Employment Action & Classification**
   - Effective date; beginning of a pay period - **required**
     - Leave effective date blank for new hires – date will be filled out by the employee at new hire orientation
   - ASC account number - **required**
   - Select action type - **required**
   - Select employee classification type - **required**; Note: student classification is only for current CSUF matriculated student
   - Select the Fair Labor Standard Act (FLSA) status; hourly or salary - **required**; Note: for Salary/Exempt must meet the min CA exempt guideline

3. **Job Information**
   - Reason for employee’s pay rate change i.e. merit, pay equity, additional duties, etc. – **required if applicable**
   - Pay rate for new hires (either bi-weekly or hourly rate) or current salary for current employee - **required**
   - Proposed New Rate – **required if applicable**
   - Job title - **required**
   - Reason for employee’s position change – **required if applicable**
   - Work Location - **required**
   - Answer yes or no pertaining to job duties; **required for compliance. Note:** Level 1 data means sensitive/protected data
   - Comments – **required if applicable**

4. **Department and Contact/Time Clock Information**
   - Department/Project Name - **required**
   - Budget period – **required if applicable**
   - Director/PI and Contact Person – **required**
   - Additional time clock approvers – **if applicable**

5. **Reason for Separation – if applicable**
   - Effective date (last day of work) – **required**
   - Select reason for separation - **required**
   - Determine if the employee is eligible for rehire - **required**
   - Involuntary separations must have HR approval before proceeding with employee dismissal - **required**

6. **Signatures**
   - Employee (new hires/rehires) – **required except for involuntary termination**
   - Initiating Supervisor – optional based on your departmental process
   - Approving Supervisor – **required**
   - OSP/Campus Program – **required if applicable**
   - Human Resources – **required**
   - Executive Director – HR will obtain signature based on policy