The PeopleSoft-CMS Temp Faculty Processing guide will cover the step by step process in creating Temp Faculty contracts using the baseline CSU Temp Faculty module.
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OVERVIEW

Beginning January 2009 CSUF will begin using the baseline CSU Temp Faculty to process all temp faculty lecturers, graduate assistants, and teaching associates. In order to receive access to this functionality all users must request access via the Human Resources Access Request Form and attend training.

Additional information about processing is detailed below:

- **Who will process the appointment(s)?**
  - It will be up to each individual college to determine who will be processing the appointment(s) in PeopleSoft.

- **Who will approve the appointment(s)?**
  - 1st level of approval: Once the department/college has processed the appointment, it will need to be approved by the college.
  - 2nd level of approval: Once approved by the college, Faculty Affairs and Records (FAR) will approve the appointment and notify the college.

- **How is the approver(s) notified an appointment is ready for approval?**
  - Processors should notify the 1st level approver (college) via email and deliver the Faculty Payroll report.

- **When can the contract be printed?**
  - Colleges will notify the processors when contracts can be printed. Processors can retrieve their contracts from FileNet once FAR has run the print process. Verify with your college to determine how contracts should be handled.

- **Where does the signed contract go?**
  - All signed contracts should be filed within the employee’s personnel files in the department or college.

- **How is Payroll notified of new and/or returning contracts?**
  - Processors will print the Faculty Payroll report. This report is submitted to the 1st level approver when the appointments are ready for approval.

- **Who do I contact for errors or data entry mistakes?**
  - If the contract has not been approved at the 1st level, contact your college coordinator.
  - If the contract has been approved at the 1st level, contact FAR.

  **Depending upon the circumstances you may need to re-print the Faculty Payroll Report and re-submit to your 1st level approver (college).**

- **I don’t understand a term or field in PeopleSoft.**
  - Review the Field Definitions page at the end of the manual to learn more about field definitions found throughout this manual and the PeopleSoft system.
CSU CONTRACT DATA

The CSU Contract Data process is used to process contract data for temporary faculty by allowing departments/colleges to enter their appointment information directly into PeopleSoft (CMS) and subsequently create a contract for the appointment. This process allows for the hiring of part-time lecturers, graduate assistants and teaching associates. Processing should not begin until courses have been identified for the lecturer.

Creating a New Contract

Type of New Contracts:
- New Semester Contract
- New 1st Semester in Year 1 of a 3 Year Contract
- New Fall semester of an Academic Year (AY) Contract

Frequency: Ad hoc. Most transactions will occur at the beginning of each semester.

**Step 1: Creating a New contract**

Navigate to the correct page:
Main Menu > CSU Temp Faculty > CSU Contract Data.

You can navigate from either the menu or folder.

**Step 2:**

Once you have selected CSU Contract Data you will be prompted to “Find an Existing” or “Add New”.

First, search for the person to verify an active contract doesn’t already exist.

It is recommended you search using one of the following criteria:
1) EmplID (CWID), or
2) Name (Last Name, First), or
3) Last Name

To determine whether a contract is active, review the contract effective and multiyear effective date(s).
Step 3:
Once the appropriate criteria have been entered, click **Search**.

---

Step 4:
If no contract is found click on the **Add a New Value** tab or link.
### Step 5:
The Add a New Value page appears.

Next, enter the appropriate values for:
- EmplID
- Department ID

Use the to lookup the appropriate values for these fields.

*Note: By using the department lookup, only a list of approved departments will be displayed under the lookup tool. Users can only create contracts for the departments they are authorized to do so for.*

### Step 6:
When the appropriate fields are completed, click Add.

---

**CSU Contract Data**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmplID</td>
<td>897826855</td>
</tr>
<tr>
<td>CSU Contract Number</td>
<td>NEW</td>
</tr>
<tr>
<td>Department</td>
<td>10036</td>
</tr>
</tbody>
</table>

Find an Existing Value | Add a New Value
Step 7:
The Contract Status/Content tab page is displayed.

The CSU Contract # is set to NEW. Once this appointment is saved, a contract number will be assigned.

Next, enter in the effective date for the start of the appointment.

The Effective Date defaults to the current date. Override, this date by choosing the appropriate effective date (usually the 1st day of the term).

Effective Date = The date the contract should become effective.

Step 7b:
For the new contract, leave the Effective Sequence at 0.
Step 8:

Enter the Contract Description.

This will help you identify the appropriate contract if a lecturer has multiple contracts in the system. The format for this field is:

<table>
<thead>
<tr>
<th>Job Code</th>
<th>Contract Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2358</td>
<td>Part Time Faculty, (current term description)</td>
</tr>
<tr>
<td>2354</td>
<td>Teaching Associate, (current term description)</td>
</tr>
<tr>
<td>2355</td>
<td>Graduate Assistant, (current term description)</td>
</tr>
<tr>
<td>2325</td>
<td>Graduate Assistant, Monthly</td>
</tr>
</tbody>
</table>

For example – Part Time Faculty Spring 2009

Step 9:

The Contract Status is defaulted to Active. You do not need to change this value.

Other Contract Statuses are available; however, most colleges are only using the status of “active”.

For more information regarding the appropriate status type, contact your College Coordinator or Dean’s office.
Step 10:

If applicable, enter the Entitlement WTU’s for lecturers with either an AY or 3 year appointment.

For 3YR appt – Total Entitlement WTU’s for the year in the formation of ##.# (i.e. 12.5 or 13.0).

Step 11:

Enter the Contract Expected End Date for this appointment.

Normally, this is the last day of the semester or the last day of the academic term based on the academic calendar.

Step 11a:

The Regulatory Region defaults to USA. You do not need to change this value.
**Step 12:** For AY and 3 year appts only!

Enter the Multi-Year End Date.

In the final year of the appointment both the Contract Expected End Date and Multi-Year End Date should be the same.

**Step 13:**

Next, enter the Contract Type. Use the search icon to view a list of valid value types.

⚠️ CSUF will only utilize the following values:
- 003 12.3 Entitlement (1AY)
- 006 Semester Appt
- 014 Year 1 of 3
- 015 Year 2 of 3
- 016 Year 3 of 3
Step 14:
Skip the Approved by boxes as they are not being used at CSUF.
Next, enter the appropriate Position Number.
Use the to see a list of active positions for your department.
Once the Position Number is entered the Business Unit, department, Job Code, and Salary Plan/Grade will automatically populate; however, you may need to change the Grade.

IF YOU DO NOT KNOW THE POSITION NUMBER TO USE, CONTACT YOUR DEAN’S OFFICE.

Step 15:
Enter the Term for the contract or use the to see a list of terms.
Terms used at CSUF are:
1 - Intercession
3 – Spring
5 - Summer
7 – Fall

Note: TF mod wil only use the Spring (3) and Fall (7) terms.

Term Example: 2093
2 = Century
09 = Year
3 = Term
**Step 16:**

The Cycle defaults to “1”. You do not need to change this value.

Next, enter the Comp Rate which is the full time salary rate or base pay.

The Compensation Rate will be multiplied by the time base fraction (derived from WTU’s) to calculate the monthly salary rate. This is a CSU calculation.

The monthly salary rate will display on **TF Contract Total**.

---

**Step 17:**

Next, identify whether the contract is an Early Term or Late Start.

The appropriate values for this field are:
- E – Early
- L – Late
- N – None

If an Early Term or Late Start is entered, you must also enter the Academic Days Paid.

The Academic Days Paid identifies how many working days the temp faculty should be paid for.

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**Chapter Title:**

**TF Processing Guide**

**Image:**

- Figure 16: Example of TF Contract Total.
- Figure 17: List of Early Term and Late Start options.

**Notes:**

- Comp Rate will default for previous TF lecturers, GA’s, and TA’s. The default rate can be overridden by typing in a new rate.

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**CSUF Date Last Revised:** 12/14/2008

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Step 18:

Do not enter any information in the Total WTU field, unless hiring a 2355 (Graduate Assistant) or 2325 (Graduate Assistant - monthly) job code.

The total WTU will populate based upon the courses entered on TF Contract Courses.

For Job Codes: 2355 and 2325 – enter the Total WTU.

Step 19:

Skip this field. CSUF will not utilize the comments field.
Contract Courses Page

This page is used to enter course and non-teaching assignments to generate total WTU’s for the appointment. Information listed at the top of this page is for display purposes only. It is based upon the information entered on the Contract Status/Content page.

Step 1:

Click on the TF Contract Courses tab.

Contract Details displayed on the page are view only. This information comes from the Contract Status/Content page.

If courses have been identified for the instructor in Student Administration, click on the Default Courses link.

If instructors have not been identified contact your course scheduling coordinator.

Adding or deleting rows of course data WILL NOT update Term Workload or the Schedule of Classes in Student Administration.

Remember WTU’s from this page will populate the Total WTU field on the Contract Status/Content page and TF Contract Total pages but can be modified as necessary.

Note: For Graduate Assistant-2355 and 2325, the Course and Other Assignment fields should remain blank; however, a position description should be provided upon acceptance of the appointment.
**Step 2: Other Assignments**

If necessary you may add Other Assignments to the appointment. These assignments are considered non-teaching units.

Enter the Assignment Type or use the search to lookup a list of valid values.

**Step 3:**

Skip reason code. CSUF is not using this field.

**Step 4:**

Next, enter the Time Source Code.

This field identifies the funding source for the faculty member.

The valid values are:
- Chancellor
- College
- Department
- Lottery
- Reimbursed
- Revenue
- University
Step 5:
Enter the Academic Org/Dept code. The format for this field is ###-Dept.

Click on the search icon to receive a list of the valid Academic Org/Dept values.

Step 6:
Enter the WTU value for the assignment.

The WTU’s entered in this field will be added to the WTU’s entered in the Course Assignments section and will populate the total WTU field on the Contract Status/Content and TF Contract Total pages.

Step 7:
Next, enter a Description of the assignment.

If necessary click on the add icon to add additional assignments.

Continue on to the TF Contract Total tab.
TF Contract Total

This page represents a summary of the information that will appear in the contract. You will use this page to review all contract information and prepare to print the contract.

Step 1:
Click on the **TF Contract Total** tab.
Review the information on the page.
To update information on the page, you must return to the appropriate tab to update the data.

Step 2:
By default, the Print column is checked. This box must be checked in order to print the contract.

Step 2a:
The Letter Code field is used to determine the type of contract being used.
To choose from a list of valid values, use the ![icon]. Then, select the appropriate code.

Values used:
- PTF
- GA
- TA
Step 3:
Once the information has been verified for accuracy, click [Save]. This will save the information in PeopleSoft.

Once the data has been saved, a CSU Contract Number will appear.

Step 4:
No changes may be made once the appointment has been saved.
To make changes you must contact the Dean’s office.
Once an appointment has been saved the Notepad feature appears on the [Contract Status/Content] tab.

Step 4a: Optional
The notepad allows processors to add a brief note or other information about the contract.
Click [Add a New Note] to add a new note to the appointment.

This information will not print on the contract and should not contain confidential data.

Example data to enter in Notepad:
- Verification of Degree
- Waiver form information
- Etc.
Step 4b:
Enter information into the subject and note text as necessary. Then, click [Save].

Each note will contain the name of the creator and the date/time the note was created.

Step 4c:
The note now appears under the Temp Faculty Notepad.

To review a note, simply click on the note link.

Otherwise, click the [Contract Data page] link to return to the Contract Data page.
**Step 5:**

To process additional appointments click the button.

Next, print the Faculty Payroll Report and notify your Dean’s office that contracts are ready for review.

Instructions for the Faculty Payroll Report are detailed in the Faculty Payroll Report section of this manual.

Each college will notify processors when contract(s) can be printed.

*Contract printing instructions are found under the section Printing Contracts of the TF Processing Manual.*
Updating an Existing Contract

This section covers updating current active multi-year contracts. These steps will allow a processor to update a multi-year contract only.

**Step 1: Updating an Existing Contract**

Navigate to the correct page:

Main Menu > CSU Temp Faculty > CSU Contract Data.

You can navigate from either the menu or folder.

**Step 2:**

Once you have selected CSU Contract Data you will be prompted to “Find an Existing Value”.

Using the search criteria, search for the person or contract.

It is recommended you search using one or more of the following criteria:
- EmplID (CWID)
- Name (Last Name, First)
- Last Name
- CSU Contract Number

**Step 3:**

Once the appropriate criteria have been entered, click Search.
Step 4:

Results will appear on the page.

Next, click on the appropriate contract.

Step 5:

The active contract is displayed.

To update the contract for the current semester, click the button under the Contract Status/Content area.

Step 6:

A new Contract Status/Content page appears.

Fields are populated based upon the previous semester. Override the appropriate data as necessary.

Note: The CSU Contract # remains the same.
Step 7:
Next, enter in the new effective date for the start of the appointment.

The Effective Date is usually the 1st day of the term.

Effective Date = The date the contract should become effective.

Step 7b:
For the new contract, leave the Effective Sequence at 0.

Step 8:
Update the Contract Description.
This will help you identify the appropriate contract if a lecturer has multiple contracts in the system.

The format for this field varies by Job Code. Use the appropriate contract description as noted to the right.

<table>
<thead>
<tr>
<th>Job Code</th>
<th>Contract Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2358</td>
<td>Part Time Faculty, (current term description)</td>
</tr>
<tr>
<td>2354</td>
<td>Teaching Associate, (current term description)</td>
</tr>
<tr>
<td>2355</td>
<td>Graduate Assistant, (current term description)</td>
</tr>
<tr>
<td>2325</td>
<td>Graduate Assistant, Monthly</td>
</tr>
</tbody>
</table>

For example – Part Time Faculty Spring 2009
Step 9:
The Contract Status is default to Active. You do not need to change this value.

Other Contract Statuses are available; however, most colleges are only using the status of “active”.

For more information regarding the appropriate status type, contact your College Coordinator or Dean’s office.

Step 10:
The Entitlement WTU’s are defaulted based upon the previous semester. Update the value if necessary.

Step 11:
Update the Contract Expected End Date for this appointment.

Normally, this is the last day of the semester based on the academic calendar.

Step 11a:
The Regulatory Region defaults to USA. You do not need to change this value.
Step 12:
The Multi-Year Contract end date should not change.

Step 13:
Next, update the Contract Type.
Use the ☐️ to view a list of valid value types.

⚠️ CSUF will only utilize the following values:
- 003 12.3 Entitlement (1AY)
- 006 Semester Appt
- 014 Year 1 of 3
- 015 Year 2 of 3
- 016 Year 3 of 3

Step 14:
Skip the Approved by boxes as they are not being used at CSUF.
Next, verify the Position Number is correct. You should not have to change this value.
Step 15:
Update the Term for the contract or use the search to see a list of terms.

Terms used at CSUF are:
1 – Intercession
3 – Spring
5 – Summer
7 – Fall

Note: TF mod will only use the Spring (3) and Fall (7) terms.

Step 16:
The Cycle defaults to “1”. You do not need to change this value.

Comp Rate does not change for the existing appointment.

The Compensation Rate will be multiplied by the time base fraction (derived from WTU’s) to calculate the monthly salary rate.

The monthly salary rate will display on the TF Contract Total.
Step 17:

Next, identify whether the contract is an Early Term or Late Start.

The appropriate values for this field are:
- E – Early
- L – Late
- N – None

If an Early Term or Late Start is entered, you must also enter the Academic Days Paid.

The Academic Days Paid identifies how many working days the temp faculty should be paid for.

Step 18: Skip Total WTU

Do not enter any information into the Total WTU field, unless hiring a 2355 (Graduate Assistant) or 2325 (Graduate Assistant - monthly) job code.

The total WTU will auto update based upon the courses entered on TF Contract Courses.

For GA Job Code (2355 or 2325) – enter the Total WTU.
Step 19:

Comments will not be utilized at CSUF.

Now, continue processing by adding course information to the contract.

To continue processing, refer to the TF Contract Courses tab located on page 14 of the TF Processing Guide.
TIMEBASE CHANGE

A **Timebase Change** is processed for contracts where a change in timebase (WTU) is made to the contract (either up or down) after the start of the semester. This process is only used for a true timebase change. Processors should only complete the timebase change after the class schedule has been modified. Contact your Class Scheduling coordinator to make modifications to the class schedule.

**Step 1:**
Performing a Timebase Change

Navigate to the correct page:

- **Main Menu > CSU Temp Faculty > CSU Contract Data.**

You can navigate from either the menu or folder.

**Step 2:**
Once you have selected **CSU Contract Data** you will be prompted to “Find an Existing Value”.

Using the search criteria, search for the person or contract.

It is recommended you search using one or more of the following criteria:
- EmplID (CWID)
- Name (Last Name, First)
- Last Name
- CSU Contract Number

**Step 3:**
Once the appropriate criteria have been entered, click **Search**.
Step 4:
Results will appear on the page.
Next, click on the appropriate contract.

Step 5:
The active contract is displayed.
To update the timebase for the current contract, click the [+] button under the Contract Status/Content area.

Step 6:
A new Contract Status/Content page appears.
Fields are populated based upon the previous screen.

Note: The CSU Contract # remains the same.
Step 7:
Next, override the following data:
- Effective Date

Effective Date = The date the timebase should become effective.

Step 8:
Next, select Late Start.

The appropriate values for this field are:
- L – Late

If a Late Start is entered, you must also enter the Academic Days Paid.

The Academic Days Paid identifies how many working days the temp faculty should be paid for.

Step 9: Skip Total WTU

Do not change any information in the Total WTU field.

The total WTU will auto update based upon the courses entered on TF Contract Courses.
Step 10:
Skip the comments field.

Step 11:
Click on the TF Contract Courses tab.

Contract Details displayed on the page are view only. This information comes from the Contract Status/Content page.

Click on the Default Courses link to update the courses for the individual.

Adding or deleting rows of course data WILL NOT update Term Workload or the Schedule of Classes in Student Administration.

Remember WTU's from this page will populate the Total WTU field on the Contract Status/Content page and TF Contract Total pages. Update the Total WTU’s field on the Contract Status/Content page if necessary.
Step 12:
Click on the **TF Contract Total** tab.
Review the information on the page.
To update information on the page, you must return to the appropriate tab to update the data.

Step 13:
By default, the Print column is checked. This box must be checked in order to print the contract.

Step 13a:
The Letter Code field is used to determine the type of contract being used.
To choose from a list of valid values, use the **Look Up**. Then, select the appropriate code.

Values used:
- PTF
- GA
- TA
Step 14:
Once the information has been verified for accuracy, click Save. This will save the information in PeopleSoft.

Step 15:
No changes may be made once the appointment has been saved. To make changes you must contact the Dean’s office.

Once an appointment has been saved the Notepad feature appears on the Contract Status/Content tab.

Step 15a: Optional
The notepad allows processors to add a brief note or other information about the contract. Click Add a New Note to add a new note to the appointment.

This information will not print on the contract and should not contain confidential data.
**Step 15b:**

Enter information into the subject and note text as necessary. Then, click **Save**.

Each note will contain the name of the creator and the date/time the note was created.

![Temp Faculty Notepad - Selected Note](image1)

**Step 15c:**

The note now appears under the Temp Faculty Notepad.

To review a note, simply click on the note link.

Otherwise, click the [Contract Data page] link to return to the Contract Data page.

![Temp Faculty Notepad](image2)

**Step 16:**

To process additional appointments click the **Add** button.

Next, print the Faculty Payroll Report and notify your 1st level approver that contracts are ready for review.

Instructions for the Faculty Payroll Report are detailed in the Faculty Payroll Report section of this manual.

Each college will notify processors when contract(s) can be printed.

![Contract Status/Content](image3)

**Contract printing instructions are found under the section Printing Contracts of the TF Processing Manual.**
FACULTY PAYROLL REPORT

The Temp Faculty Payroll Report replaces the college/department process of submitting signed copies of part time lecturers, graduate assistants and teaching associate contracts to Payroll Services. Processors submit this report to the 1st level approver (College) once the processing of all appointments is complete. Once appointments are approved, the College will forward the Faculty Payroll Report to the 2nd level approver (FAR). After all appointments are approved FAR will forward the report to Payroll Services for final processing.

Faculty Payroll Report by Dept

**Frequency:** Approvals will be ad hoc based upon frequency of temp faculty appointment/change in appointment transactions. Most of these transactions will occur at the beginning of each semester.

**Step 1:**

Navigate to the correct CMS page:

- Home > CSU Temp Faculty > FUL Temp Faculty Reports - DEPT > Faculty Payroll Report by Dept

**Step 2:**

Once you have selected Faculty Payroll Report by Dept you will need to enter a Run Control ID.

Run Control ID identifies specific run control settings for a particular report or process. A Run Control ID must exist in order to run a CMS report or process.

Click Search to see what run controls you have available to you.

If this is your first time running the report, click Add a New Value.

**TF Payroll Rpt by DeptID-DEPT**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Search by:** Run Control ID begins with ______

- Case Sensitive

Find an Existing Value | Add a New Value
Step 3:
Enter ‘TF_Payroll_Report_Dept’ in the Run Control ID box (or any other name you want to create).

Click **Add**

Step 4:
The Faculty Payroll Report tab displays. You must complete all fields.

- **From Date:** Enter the appropriate effective date from the contract data information. PeopleSoft will run the Payroll Report for all transactions starting with this effective date.
- **Thru Date:** Enter the processing end date. PeopleSoft will run the Payroll Report through this date for all transactions with this effective date.
- **Department:** Enter the 5-digit department ID of the department you are going to run the report for.
- **Job Code:** Enter the job code 2358 (part-time lecturer), 2325 or 2355 (graduate assistant) or 2354 (teaching associate). To run the report with additional job codes, use the ▼ button.

Once you have entered the required fields, click **Run**.
Step 5:
The following fields need to be completed as follows:

Server Name: PSUNIX
Type: Web
Format: PDF

Select the Faculty Payroll Report by Department.

Step 6:
For troubleshooting purposes, you must specify the "Distribution" information.

Click on the Distribution link.

Note: This step must be completed only once per report.

Step 7:
The Distribution Detail page appears.

Click on the + button to add a new row.

Step 8:
In the new row, complete the following fields:

- ID Type: Role
- Distribution ID: FS HR

Then click the look up icon.
Step 9:
The Distribution ID look up page appears. Click on the link [FS HRRReport Distribution List].

Look Up Distribution ID

Search by: Distribution ID begins with FS HR

[Look Up] [Cancel] [Advanced Lookup]

Search Results

<table>
<thead>
<tr>
<th>Distribution ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FS HRRReport Distribution List</td>
<td></td>
</tr>
</tbody>
</table>

Step 10:
Verify the Distribution Detail page for accuracy.

Once complete, click [OK].

Distribution Detail

Process Name: FULTL002
Process Type: EOR Report
Folder Name: 

Distribute To

<table>
<thead>
<tr>
<th>ID Type</th>
<th>Distribution ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>092240626</td>
</tr>
<tr>
<td>Role</td>
<td>FS HRRReport Distribution List</td>
</tr>
</tbody>
</table>

Email Only

Email Subject: 
Email With Log [ ] Email Web Report [ ]
Message Text:

Email Address List:

[OK] [Cancel]

Step 11:
At the Process Scheduler page, click [OK].

Process Scheduler Request

User ID: LEOYARD
Run Control ID: TF_Parent_Report_Dopt

Server Name: PSJNC
Run Date: 12/18/2009
Run Time: 5:50 AM
Time Zone: 

[OK] [Cancel]

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Process Type</th>
<th>Type</th>
<th>Format</th>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPT Payroll Report</td>
<td>FULRPRTF</td>
<td>Crystal</td>
<td>Web</td>
<td>PDF</td>
</tr>
<tr>
<td>TF Payroll Report by Department</td>
<td>FULTR001</td>
<td>EOR Report</td>
<td>Web</td>
<td>PDF</td>
</tr>
</tbody>
</table>
Step 12:
Once you have initiated the process you can check the status and view the report generated by clicking Report Manager.

Step 13:
When “Posted” appears next to the process that you ran you can view the report that you generated.

If you do not see “Posted”, the process is not complete. Click Refresh to update its status periodically.

Step 14:
If the report name does not appear in a hyperlink, the process has not finished. Click Refresh to update the status of the process. You may have to click this button several times before the process is Posted.

When the status Posted appears next to the process you initiated, you can click the Report name to access the report.
Step 15:

The Faculty Payroll Report opens in a new window.

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Maldon, Lynn</td>
<td>B00086032</td>
<td>0</td>
<td>552-57-4527</td>
<td>DTA/APT 60023015</td>
<td>242-157-2538-001</td>
<td>01/10/2009</td>
<td>05/31/2009</td>
<td>3 5</td>
<td>2</td>
<td>$3879</td>
<td>146</td>
<td>66</td>
<td></td>
</tr>
</tbody>
</table>

Signature: __________________________ Date: __________________________

Print this document, obtain the appropriate signatures and send it to 1st level approver (College).

You have successfully run a Faculty Payroll Report by Department.
Faculty Payroll Report by EmplID (CWID)

The **Temp Faculty Payroll Report** replaces the college/department process of submitting signed copies of part time lecturers, graduate assistants and teaching associate contracts to Payroll Services. Access to run the Payroll Report by Emplid will depend upon Payroll processing dates. An email notification will be sent to processors each semester.

**Frequency:** Approvals will be ad hoc based upon frequency of temp faculty appointment/change in appointment transactions. Most of these transactions will occur at the beginning of each semester.

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>Navigate to the correct CMS page:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Home &gt; CSU Temp Faculty &gt; FUL Temp Faculty Reports - DEPT &gt; Faculty Payroll Report by EmplID</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2:</th>
<th>Once you have selected Faculty Payroll Report you will need to enter a Run Control ID.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>You need to have a run control ID in order to run reports in CMS.</td>
</tr>
<tr>
<td></td>
<td>Run Control ID identifies specific run control settings for a particular report or process.</td>
</tr>
<tr>
<td></td>
<td>Click Search to see what run controls you have available to you.</td>
</tr>
<tr>
<td></td>
<td>If this is your first time running the report, click Add a New Value.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3:</th>
<th>Enter 'TF_Payroll_Report_Emplid' in the Run Control ID box (or any other name you wish to use for this run control ID).</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click Add.</td>
</tr>
</tbody>
</table>
Step 4:

The Faculty Payroll Report by Emplid tab displays. You must complete all **bold** fields.

- **From Date:** Enter the appropriate effective date from the contract data information. PeopleSoft will run the Payroll Report for all transactions starting with this effective date.
- **Thru Date:** Enter the processing end date. PeopleSoft will run the Payroll Report through this date for all transactions with this effective date.
- **Department:** Enter the 5-digit department ID of the department you are going to run the report for.
- **Job Code:** Enter the job code 2358 (part-time lecturer), 2325 or 2355 (graduate assistant) or 2354 (teaching associate). To run the report with additional job codes use the **button**.
- **EmplID:** Enter the EmplID of the employee you are going to run the report for. You may also use the magnifying glass icon to choose from an available list of Emplid’s. To add or remove Emplid’s click the + or – button.

Once you have entered the required fields, click **Run**.
Step 4a:
Next, specify whether the contract is Revised.

Step 5:
The following fields need to be completed as follows:

Server Name: PSUNIX
Type: Web
Format: PDF

Step 6:
For troubleshooting purposes, you must specify the “Distribution” information.

Note: This step must be completed only once per report.

Step 7:
The Distribution Detail page appears.

Click on the button to add a new row.
Step 8:
In the new row, complete the following fields:
- ID Type: Role
- Distribution ID: FS HR
Then click the look up icon.

Step 9:
The Distribution ID look up page appears. Click on the link [FS HR Report Distribution List].

Step 10:
Verify the Distribution Detail page for accuracy.
Once complete, click [OK].
Step 11:
At the Process Scheduler page, click **OK**.

**Process Scheduler Request**

User ID: LLEDWARD  Run Control ID: TF_Payroll_Rpt_EmpId

<table>
<thead>
<tr>
<th>Server Name</th>
<th>Run Date: 12/12/2009 8:00 AM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Time Zone: 10:25:08 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Process List</th>
<th>Time Format</th>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>TF Payroll Rpt by EmpId</td>
<td>FullPDF3</td>
<td>SOR Report</td>
</tr>
</tbody>
</table>

[OK] [Cancel]

Step 12:
Once you have initiated the process a process instance number will appear.

You can check the status and view the report generated by clicking **Report Manager**.

**Report Request Parameters**

Run Control ID: TF_Payroll_Rpt_EmpId
Language: English

<table>
<thead>
<tr>
<th>From Date: 01/01/2009</th>
<th>To Date: 12/31/2009</th>
</tr>
</thead>
</table>

| Department: 10036 | Biological Science |

Step 13:
When “Posted” appears next to the process that you ran you can view the report that you generated.

If you do not see “Posted”, the process is not complete. Click **Refresh** to update its status periodically.

Step 14:
If the report name does not appear in a hyperlink, the process has not finished. Click **Refresh** to update the status of the process. You may have to click this button several times before the process is Posted.

When the status Posted appears next to the process you initiated, you can click the Report name to access the report.
Step 15:

The Faculty Payroll Report appears.

### Faculty Payroll Report by Department

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Empl ID</th>
<th>Role</th>
<th>SSN</th>
<th>Action/Reason</th>
<th>CMS Position</th>
<th>SCO Position</th>
<th>App. Start Date</th>
<th>App. End Date</th>
<th>Timebase</th>
<th>Range</th>
<th>Salary</th>
<th>Dept Code</th>
<th>School Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maldon, Lynn</td>
<td>B00196512</td>
<td>0</td>
<td>552-57-4527</td>
<td>DTA/APT 60020105</td>
<td>242-157-2508-001</td>
<td>01/19/2009</td>
<td>05/31/2009</td>
<td>51</td>
<td>3.5</td>
<td>2</td>
<td>53879</td>
<td>146</td>
<td>66</td>
</tr>
</tbody>
</table>

Signature: ____________________________ Date: ________________

Print this document, obtain the appropriate signatures and send it to 1st level approver (College).

You have successfully run a Faculty Payroll Report by EMPLID.
APPOINTMENT APPROVAL

The Temp Faculty Approval process is required to generate the contract for a part time lecturer, graduate assistant, and teaching associate. Once a department has processed an appointment or job data change, information will be displayed on an approval page for a specific department and term. The processor must notify the 1st level approver via email the appointment is ready for approval.

**Frequency:** Approvals will be ad hoc based upon frequency of temp faculty appointment/change in appointment transactions. Most of these transactions will occur at the beginning of each semester.

### Step 1:
Navigate to the correct CMS page:

**CSU Temp Faculty > CSU Temp Faculty Processing**

### Step 2:
The CSU Temp Faculty Processing page appears.

Enter the Department ID number and Term, or use the **Search** to receive a list of valid values.

Then, click **Search**.

### Step 3:
The active contracts for the specified Department and Term will appear.

Verify all the data on the approval page.

**Verify the Contract Effective Date is correct.**
Step 4:

To review job history information, click **Job History**. Previous Job History information will appear.

Select **Return to Search Results** to return to the approval page.

Step 5:

Next, enter the appropriate New Action and New Reason code.

Use the search to look up the valid values for the New Action, and New Reason fields.

Step 6:

When the appointments are ready for approval, select the box under the “Okay to Load” column. Then click **Save**.

To continue processing, send the Faculty Payroll Report to FAR for 2nd level approval.

Step 7: (If necessary)

If contract data is incorrect, changes to contract data can be changed by the 1st level approver.

Navigate to: **Main Menu > CSU Temp Faculty > CSU Contract Data**
Step 7a:
Enter the appropriate criteria to retrieve the contract.

Step 7b:
Next, select "correct history" and update the appropriate fields on any of the Contract tabs. Then click **Save**.

Step 7c:
Return to **CSU Temp Faculty > CSU Temp Faculty Processing** to approve the updated contract data by following steps 2-6.

Next Steps: Send the Faculty Payroll Report to Faculty Affairs and Records for 2nd level approval.
PRINTING CONTRACT

Department processors will be notified by their college when contracts are available for printing. Contracts can only be retrieved through the e-content tab by logging into the campus portal. Access to contracts will be based upon a user’s department security in the PeopleSoft system.

<table>
<thead>
<tr>
<th><strong>Step 1:</strong></th>
<th>Launch Internet Explorer (or your browser preference) from your desktop.</th>
</tr>
</thead>
</table>

| **Step 2:** | Your home page opens. If your home page is not the CSUF website, type [www.fullerton.edu](http://www.fullerton.edu) in the address bar and click Go or hit ‘Enter’ on your keyboard. |

| **Step 3:** | Enter your campus assigned username and password under “Portal Log In”. Click LOGIN. |

| **Step 4:** | You are now taken to the Faculty/Staff Portal. Click the e-Content tab. |
Step 5:
To access e-content, click **My Workplace**.

Step 6:
From the e-content homepage, select “Faculty Contracts”.

Step 7:
Select the “Faculty Contracts” link.

Step 8:
The Faculty Contracts search page opens in a new window.

Enter search criteria to narrow down the contracts that will appear on the page.

You may use any combination of the search criteria to narrow down the search results; however, it is recommended to either enter the EmplID (CWID) or Department ID.

Then, click **Search**.
Step 9:

The contract PDF file(s) will appear.

Each PDF file contains 1 contract per EmplID.

Select the appropriate contract.

Step 10:

The appointment and contract details will open in Adobe PDF.

Note: Contracts will be available via e-content for approximately 48 months (2 years).
FACULTY JOB ROSTER

The Faculty Job Roster was developed to allow departments to view employment information for their employees. The Faculty Job Roster displays all active faculty in a given department. Separated lecturers will continue to display on the roster for 30 days after their separation date. Once beyond 30 days of separation, they will no longer appear on the roster. All data displayed for each employee is their current employment information for the department being viewed.

Frequency: Ad hoc

Step 1:

Navigate to the correct CMS page:

Menu > CSUF HR > Inquire > Faculty Job Roster

Note: You may navigate to the appropriate link using the menu list on the left or the link in the body of the page.

Step 2:

Once you have selected the Faculty Roster, the search page will appear.

**Note:** If you have security access to multiple departments, you will be required to search and select the department that you would like to display.

To select a department, click .
Step 2A:

On the Look Up Department page, click **LookUp** for a list of your departments. Only department(s) you have access to view will be displayed. Next, select the appropriate Department ID number.
The Faculty Job Roster appears:

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Emp Term</th>
<th>Telephone Type</th>
<th>Position Number</th>
<th>CSU Unit</th>
<th>Job Code</th>
<th>CSU Serial</th>
<th>PTL</th>
<th>Union Code</th>
<th>Salary Grade</th>
<th>Term Class</th>
<th>Appointment Start Date</th>
<th>Base Rate</th>
<th>Comp Rate</th>
<th>Supervisor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Titan, Anjo</td>
<td>862293234</td>
<td>0</td>
<td>Telephonic</td>
<td>00223157</td>
<td>314</td>
<td>1150 001</td>
<td>0.100000 09 R11</td>
<td>BA</td>
<td>Infirm</td>
<td>S1</td>
<td>Regular</td>
<td>05/30/2017</td>
<td>10.300000</td>
<td>1735.333</td>
<td>Deland, Paul N</td>
</tr>
<tr>
<td>Titan, Mark</td>
<td>859998332</td>
<td>0</td>
<td>Telephone</td>
<td>00223803</td>
<td>314</td>
<td>2380 001</td>
<td>1.000000 03 R03</td>
<td>ASSOCIATE PROFESSOR</td>
<td>Regular</td>
<td>05/30/2017</td>
<td>5237.000000</td>
<td>5237.000000</td>
<td>Deland, Paul N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Titan, Terio</td>
<td>862190089</td>
<td>0</td>
<td>Telephonic</td>
<td>00223157</td>
<td>314</td>
<td>1150 001</td>
<td>0.100000 09 R11</td>
<td>BA</td>
<td>Infirm</td>
<td>S1</td>
<td>Regular</td>
<td>05/30/2017</td>
<td>9.000000</td>
<td>1560.000</td>
<td>Deland, Paul N</td>
</tr>
<tr>
<td>Zann, Peter</td>
<td>869998440</td>
<td>0</td>
<td>Telephone</td>
<td>00222868</td>
<td>314</td>
<td>2358 001</td>
<td>0.533333 03 R03</td>
<td>A</td>
<td>Temp 3 Yr</td>
<td>3 Years</td>
<td>05/23/2009</td>
<td>3281.000000</td>
<td>1743.966</td>
<td>Deland, Paul N</td>
<td></td>
</tr>
</tbody>
</table>
# FIELD DEFINITIONS

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Days Paid</strong></td>
<td>The field identifies the number of academic days that the lecturer should be paid for. This field is only used when Early Term or Late Start have been identified.</td>
</tr>
<tr>
<td><strong>Agency</strong></td>
<td>This field contains the State Controller’s Office payroll agency number and is used to identify the payroll source. This field is used in combination with the Unit, Job Code (Class), and Serial fields to record the employee’s SCO Position Number.</td>
</tr>
<tr>
<td><strong>Approved By</strong></td>
<td>These fields are not being used at CSUF.</td>
</tr>
<tr>
<td><strong>Appt End Date</strong></td>
<td>The date that a temporary appointment expires and is reflected as the Close of Business. For temporary employees appointed to academic year assignments, Appointment End Date must denote the last date of the semester or academic year, in accordance with the CSUF’s academic calendar.</td>
</tr>
<tr>
<td><strong>Base Rate</strong></td>
<td>This is the rate that the employee is paid based upon a 1.0 time base. The value entered here, multiplied by the FTE, determines the actual compensation rate.</td>
</tr>
<tr>
<td><strong>Business Unit</strong></td>
<td>This field contains the number used to separate documents, such as paychecks, produced by the SCO PIMS System.</td>
</tr>
<tr>
<td><strong>Catalog Number</strong></td>
<td>This field contains the course catalog number. This information is pulled in from the Course Catalog in Student Administration.</td>
</tr>
<tr>
<td><strong>Class Number</strong></td>
<td>The filed contains the class number for the course assigned to the contract. This information is pulled in from the Course Catalog in Student Administration.</td>
</tr>
<tr>
<td><strong>Combo Code</strong></td>
<td>Identifies what department, fund, and account a position is being funded from. It replaces the SCO position number to identify funding.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>Free form field used to add comments about the contract. These comments will not print on the contract.</td>
</tr>
<tr>
<td><strong>Comp Rate</strong></td>
<td>This reflects the actual salary the employee is paid. The actual compensation rate amount is generated based on the Base Rate and FTE.</td>
</tr>
<tr>
<td><strong>Contract Desc</strong></td>
<td>The contract description field helps determine which active contract to choose in the search menu. It identifies the job code and term for the contracts.</td>
</tr>
<tr>
<td><strong>Contract Expected End Date</strong></td>
<td>The end date of the temporary appointment for the current academic year. Normally, this is the last day of the semester or the academic year.</td>
</tr>
<tr>
<td><strong>Contract Number</strong></td>
<td>The unique number automatically assigned by the system when the contract is saved.</td>
</tr>
<tr>
<td><strong>Contract Status</strong></td>
<td>Status of the contract. Most colleges will only use “active”.</td>
</tr>
<tr>
<td><strong>Contract Type</strong></td>
<td>Identifies the type of appointment and entitlement, if applicable.</td>
</tr>
<tr>
<td><strong>CSU Serial</strong></td>
<td>The serial is derived from the CMS Empl Record number. The format is empl Record number + 001 (e.g., if empl record is 1, then serial number is 002).</td>
</tr>
<tr>
<td><strong>Cycle</strong></td>
<td>Defaults as “1”. The cycle is used to divide the semester into segments.</td>
</tr>
<tr>
<td><strong>Date Printed</strong></td>
<td>Identifies the date the contract letter is generated. Once the contract has been printed, this field will update automatically.</td>
</tr>
<tr>
<td><strong>Description (TF Contract Courses)</strong></td>
<td>This field contains the course description. This information is pulled in from the Course Catalog in Student Administration.</td>
</tr>
<tr>
<td><strong>Department ID</strong></td>
<td>This field displays the department number that the person was appointed into. It auto populates based upon the position number.</td>
</tr>
<tr>
<td><strong>Duration of Appointment</strong></td>
<td>This field identifies the length of the appointment i.e. semester, academic year.</td>
</tr>
<tr>
<td><strong>Early Term/Late Start</strong></td>
<td>This field is used to identify if the appointment is an early termination or late start.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Effective Date</td>
<td>This is the effective date for the proposed transaction; usually the first day of the semester.</td>
</tr>
<tr>
<td>Effective Sequence</td>
<td>The sequence number, which defaults to 0 for new appts. This is used for contracts that have revisions falling on the same effective date; however, CSUF will not utilize this functionality.</td>
</tr>
<tr>
<td>EmplID</td>
<td>This is the Campus Wide ID number for the employee.</td>
</tr>
<tr>
<td>Empl Class</td>
<td>This field defines the type of appointment for this job record i.e. Regular, FERP, etc…</td>
</tr>
<tr>
<td>Empl Rcd Nbr</td>
<td>This field contains the employment record number. Employment Record Numbers uniquely identify job records in the event an employee holds two or more jobs concurrently. Each additional job held concurrently with the initial job is assigned the next sequential employment record number.</td>
</tr>
<tr>
<td>Entitlement</td>
<td>The total entitlement WTU’s for lecturers with a 3 year or academic year entitlement. It is expressed as a total WTU in the format of #.#.</td>
</tr>
<tr>
<td>Fraction</td>
<td>This field contains the fractional representation of the FTE. This field is used specifically by Payroll in the PPT generation.</td>
</tr>
<tr>
<td>FTE</td>
<td>This field contains the calculated percentage of standard hours the employee works per work period based on the job code definition of standard hours per work period.</td>
</tr>
<tr>
<td>Job Code</td>
<td>Identifies the job classification that the employee was appointed into. It auto populates based upon the position number.</td>
</tr>
<tr>
<td>Last Upd By</td>
<td>Shows the last user who made a change displaying the userid and date stamp. This will not update if the update was done in ‘correction mode’.</td>
</tr>
<tr>
<td>Last Upd DtTm</td>
<td>This field shows the time the contract was last updated.</td>
</tr>
<tr>
<td>Letter Code</td>
<td>This field contains the code to generate the appropriate contract letter.</td>
</tr>
<tr>
<td>Monthly Rate</td>
<td>This field contains the monthly rate, which is displayed for informational purposes. Multiplying the comp rate by the time base derives this field.</td>
</tr>
<tr>
<td>Multi Year End Date</td>
<td>For lecturers with 3 year appointments only. The approximate end date of the 3 year appointment.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the person. Automatically populates based upon the EmplID entered on the Contract Data page.</td>
</tr>
<tr>
<td>Name Prefix</td>
<td>Mr., Ms., Dr., etc.</td>
</tr>
<tr>
<td>Name Suffix</td>
<td>Jr, Sr, IV, etc.</td>
</tr>
<tr>
<td>Pay Decimal</td>
<td>This field reflects the accurate FTE for temporary faculty and is used to compute compensation rate.</td>
</tr>
<tr>
<td>Pool ID</td>
<td>Used to identify a group of positions with a funding source.</td>
</tr>
<tr>
<td>Position Number</td>
<td>Identifies the CMS position that the employee occupies. Unlike the SCO position number, the CMS position number has no meaning behind it. It is a randomly generated eight digit number that has data elements attached to it which define an appointment for a person.</td>
</tr>
<tr>
<td>Reg Region</td>
<td>This is the Regulatory Region which defaults to USA. This value should never change.</td>
</tr>
<tr>
<td>Reports To</td>
<td>This is the supervisor of the employee. For faculty this the department chair of the department that they are appointed to.</td>
</tr>
<tr>
<td>Revised Contract</td>
<td>This field is used only if the contract needs to be corrected and re-run.</td>
</tr>
<tr>
<td>Salary Plan/Grade</td>
<td>A default grade that auto populates when the position number is entered. The salary grade is a generic value assigned to the position number. Enter the correct salary grade that corresponds to the lecturer’s grade.</td>
</tr>
<tr>
<td>Section</td>
<td>This field contains the course section number. This information is pulled in from the Course Catalog in Student Administration.</td>
</tr>
<tr>
<td>Subject Area</td>
<td>This field contains the subject area for the course assigned to the contract. This information is pulled in from the Course Catalog in Student Administration.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>This is the supervisor of the employee. For faculty this the department chair of the department that they are appointed to.</td>
</tr>
<tr>
<td>Term</td>
<td>The semester of the appointment. An example of the CSUF term 2093 is: 2 = Century, 09 = Year, 3 = Term.</td>
</tr>
<tr>
<td>Term Rate</td>
<td>This field contains the term rate, which is derived by multiplying the month rate by the number of pay months.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Time base</td>
<td>This field contains the calculated percentage of standard hours the employee works per work period based on the job code definition of standard hours per work period.</td>
</tr>
<tr>
<td>Units</td>
<td>This field contains the units associated with the course entered. The total units from the TF Contract Courses page will populate the Total WTU's on the TF Contract Total Page.</td>
</tr>
<tr>
<td>Union Code</td>
<td>For represented employees, this field identifies the union and MOU under which the employee has been appointed. For non-represented employees, Union Code is used to distinguish between executive, management, excluded, or confidential appointments.</td>
</tr>
<tr>
<td>WTU</td>
<td>Weighted Teaching Units</td>
</tr>
</tbody>
</table>