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 when presenting I-9 documents.*
   - CWID - **required**

2. **Employment Action & Classification**
   - Effective date; beginning of a pay period - **required**
   - **Note:** leave effective date blank for new hires – date will be filled out by HR
   - ASC account number – **required**
     - Note: If listing multiple accounts for exempt employees, please specify the % on each account. If not specified, HR will default to an even split.
   - 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
   - Effective Date – **required if applicable**
   - Proposed New Rate – **required if applicable**
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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

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