

Personnel Transaction Form



Personnel Transaction Report (PTR) Employment & Employee Changes

All changes in employee status must be completed in every case when there is an employee change in job classification, salary rate, job status or termination. This form must be received by Human Resource-Auxiliary Services Corporation ("ASC") **25** to the effective date. If you have any questions regarding this form, please contact Human

EMPLOYEE INFORMATION			
S.S.N.	CWD		
Last Name	First Name	Middle Initial	
Address	City	Zip Code	
Phone number	Email	<input type="checkbox"/> Current ASC Employee	
Emergency Contact	Phone Number	<input type="checkbox"/> CSUF Faculty/Staff	
<small>All employees are required to meet federally mandated I-9 work eligibility and authorization procedures. All employees therefore must present acceptable work authorization documents in person to Human Resource-ASC PRIOR to their first day of work as a new hire or rehire.</small>			
EMPLOYMENT ACTION AND CLASSIFICATION			
Effective Date	Action	Pay Rate Change	Leave of Absence (HR approval req)
Account Number		Position Change	From: To:
		Termination	Other:
Employee Classification	Temporary	Full-time	Non-Exempt (Hourly)
<input type="checkbox"/> Full-time	<input type="checkbox"/> Student (up to 20/hr wk)	<input type="checkbox"/> Temporary	<input type="checkbox"/> Non-Exempt (Hourly)
<input type="checkbox"/> Part-time benefited			
<input type="checkbox"/> Part-time			
JOB INFORMATION			
Rate Change Reason (if app)	**Pay Rate	% Rate Diff	**Proposed New Rate (if app)
<input type="checkbox"/> Merit (attach evaluation)	BI-weekly:	current vs. proposed new rate	(Salary)
<input type="checkbox"/> Promotion (HR must approve)	Hourly:		Hourly:
<input type="checkbox"/> Other			
Hours/Week			
Job Title:			
Position Change Reason	Work Location	This position:	
<input type="checkbox"/> Promotion-HR approval Req	<input type="checkbox"/> On-campus	<input type="checkbox"/> Supervisory authority (Admins Training required)	
<input type="checkbox"/> Reclassification	<input type="checkbox"/> Off-campus	<input type="checkbox"/> Work with Children LiveScan required: YES <input type="checkbox"/> NO <input type="checkbox"/>	
<input type="checkbox"/> Other (Specify)	Location:	Cash handling responsibilities	
Comments:			
DEPARTMENT AND CONTACT INFORMATION			
Dept/Project Name:	PI:	(please print)	
	Email:	Phone:	
Budget Period: (Not to exceed one year)	Contact Person:	(please print)	
From: To:	Email:	Phone:	
REASON FOR SEPARATION			
Effective Date	<input type="checkbox"/> Professional Development	<input type="checkbox"/> End Temporary Appt	Requires HR Approval
	<input type="checkbox"/> Better Job	<input type="checkbox"/> Other:	<input type="checkbox"/> Job Abandonment
	<input type="checkbox"/> Better Pay		<input type="checkbox"/> Layoff
	<input type="checkbox"/> Personal Reasons		<input type="checkbox"/> Dismissal
	<input type="checkbox"/> Dissatisfaction with Job		<input type="checkbox"/> Fall Rtn from Leave
Eligible for Retire?	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Separation by Agency
AUTHORIZATION SIGNATURES			
TRANSACTION IS NOT OFFICIAL WITHOUT ALL REQUIRED SIGNATURES AND FINAL HR APPROVAL			
Employee	Date	Human Resources	Date
Initiating Supervisor	Date	Executive Director	Date
Approving Supervisor	Date	Pay Class	WC Code
OSP/Agency	Date	Distribution: Original: HR Copy: Payroll Copy: Employee	FICA Exempt <input type="checkbox"/> International Student <input type="checkbox"/>

Personnel Transaction Report (PTR)

- New hires need to complete this portion of their personal information
- The effective date is the date the individual can start working
 - The account number is to which project the employee's salary and wages will be charged
 - Action type determines the purpose of this form (i.e. to hire a new employee)
- Employee classification
 - Will this person be working 40 hours a week? 30 hours a week? Or a student at 20 hours a week?
 - Based on guidance from HR during job description review will this person be salaried or hourly?
- Pay Rate – indicate the rate of pay for this employee
- Promotion change, work location and position
 - Is this person receiving a promotion or reclassification?
 - Will the individual work on or off campus?
 - Will this person have supervisory authority, work with children, etc?
- Complete the department contact information
- Complete this portion if the person is leaving the job
- Signatures needed from the employee and supervisor; if approved the Sponsored Programs Administrator will sign