



HCM 8.9 Business Process Guide Create a Coach Faculty Contract

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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 coaches and other temporary faculty. 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

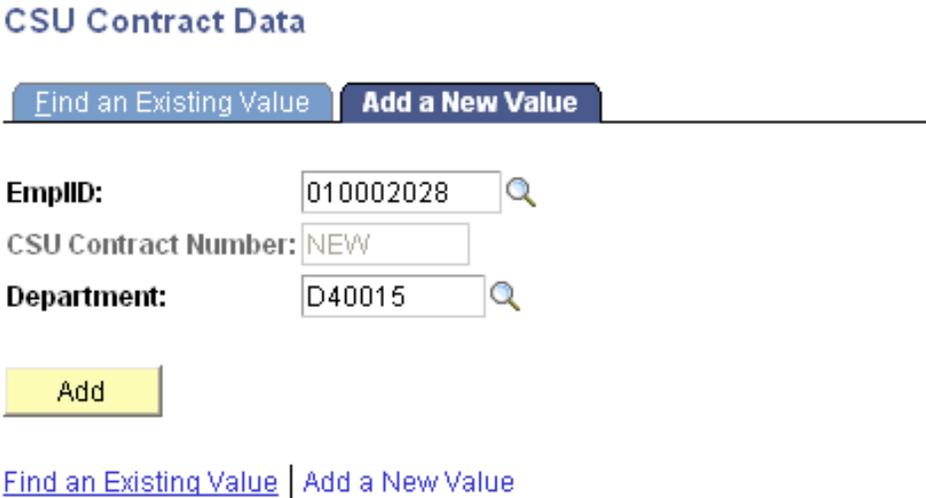
The first step in Creating a New Coach Faculty Contract is to navigate to the correct PeopleSoft page and enter the appointment information for the contract.

Create a New Coach Faculty Contract

The CSU Temporary Faculty Contract Data component is used to process appointment data for coaches. Once entered, this data is used by the Athletics Department to print the Coach Transaction Form, by APS for compliance review, by the Office of the Vice President for Student Affairs (VPSA) to generate the coach appointment letter, and by Payroll to complete the hiring process.

- ❗ To create a contract, the coach 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 coach appointment. The “contract” that is printed at the end of this process is called a Coach Transaction Form. It will be processed the same way as the manually created Coach appointment form used in previous years. At the end of the process, the coach will still receive an appointment letter from the VPSA. The “contract” conveys the details of the coach 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. D40015, D40010, D40018, etc. 5. Click on the  button. 	 <p>The screenshot shows the 'CSU Contract Data' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are three input fields: 'EmplID:' with the value '010002028', 'CSU Contract Number:' with the value 'NEW', and 'Department:' with the value 'D40015'. Each input field has a magnifying glass icon to its right. Below the input fields is a yellow 'Add' button. At the bottom of the form, there are two blue hyperlinks: 'Find an Existing Value' and 'Add a New Value'.</p>



Contract Status/Content Page Steps

Use the Contract Status/Content page to enter basic information about the coach appointment, including the beginning and ending dates, type of appointment, compensation, position number, term, WTUs and, for 10-month appointments, the two months of the year the coach will not be working.

- ❗ The **Contract Type** is used to define the type of appt (10-month, 12-month, or academic year).
- ❗ 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.

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"> Enter the Effective Date for the start of the temporary appointment. <p>See Contract Dates for 2008-09</p> <ul style="list-style-type: none"> ❗ The Effective Date defaults to the current date. Override it by manually entering the correct date, if necessary. <ol style="list-style-type: none"> Accept the Effective Sequence default of 0. Enter the Contract Description. The format for the HSU Coach Contract Description = ATHL 4-digit year Coach Initials. <ul style="list-style-type: none"> ➢ ATHL 0809 RAB ➢ ATHL 0809 DPT Accept the default Contract Status of "Active". <ul style="list-style-type: none"> ❗ HSU uses only "Active" or "Cancelled" Skip the Entitlement field. Enter the Contract Expected End Date for this appt. Accept the Regulatory Region default of "USA". Skip the Multi-Year End Date field. Enter the Contract Type. <ul style="list-style-type: none"> ➢ 001 for AY. ➢ 002 for 12-Month. ➢ 012 for 10-Month <ul style="list-style-type: none"> ❗ Click on for a list of values. Skip the Approved by boxes – HSU does not use. 	<p>The screenshot shows the 'Contract Status/Content' page for Richard Brown (Person ID: 010002028). The page is divided into two main sections: 'Contract Status/Content' and 'TF Contract Detail'. The 'Contract Status/Content' section includes fields for CSU Contract # (000001881), Eff Date (08/01/2008), Contract Status (Active), Reg Region (USA), Contract Type (012 - 10 Month Appointment), and Contract Expected End Date (05/31/2009). The 'TF Contract Detail' section includes fields for Position Num (00020963 - COACH - 10 MO), Department (D40011 - ATHLETICS-XCOUNTRY), Term (0809), Cycle (1), and Total WTU (12.00000). The page also features navigation tabs for 'Contract Status/Content', 'TF Contract Courses', and 'TF Contract Total', and a toolbar with buttons for Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History.</p>



Processing Steps	Screen Shot
<p>TF Contract Detail:</p> <ol style="list-style-type: none"> Enter the Position Number. <ul style="list-style-type: none"> This is the dept's specific position # for each coach position. The position # will automatically populate the Business Unit, Department, Job Code, and Sal Plan/Grade. Accept the Salary Grade default of 0 for coaches. Enter the Term for the contract. <ul style="list-style-type: none"> Term number = unique four digit code to designate year. > 0809 = 2008/2009 Accept the Cycle default of "1". Enter the Comp Rate = Full time Salary Rate (Base Pay). <ul style="list-style-type: none"> 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.) Accept the Late Start? Default of "N". <ul style="list-style-type: none"> See Field Definitions for appts that start after the beginning of the semester. Enter Total WTU value. <ul style="list-style-type: none"> The Total WTUs are based on the timebase of the appointment. To calculate Total WTUs, multiply the desired timebase by 15 WTUs (the equivalent of full-time). <ul style="list-style-type: none"> > .80 timebase x 15 WTU = 12.0 Total WTU > 1.00 timebase x 15 WTU = 15.0 Total WTU Enter months off in Comments field, if 10-month appointment. <p style="color: red;">Information entered in the Comments field will print on the transaction form.</p> <p>Click the TF Contract Courses tab at the top of the page.</p>	<p>The screenshots show the HCM system interface. The top screenshot displays the 'Contract Status/Content' tab with fields for CSU Contract # (000001881), Eff Date (08/01/2008), Contract Status (Active), Reg Region (USA), Contract Type (012), and Approved by (Approver 1, Approver 2, Approver 3). The bottom screenshot displays the 'TF Contract Detail' tab with fields for Position Nbr (00020963), Department (D40011), Term (0809), Cycle (1), Late Start? (N), and Total WTU (12.00000). A red arrow points from the 'Comments' field in the top screenshot to the 'Comments' field in the bottom screenshot.</p>



TF Contract Courses Page Steps

Use this page to enter the coach working title/assignment.

- 1 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

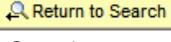
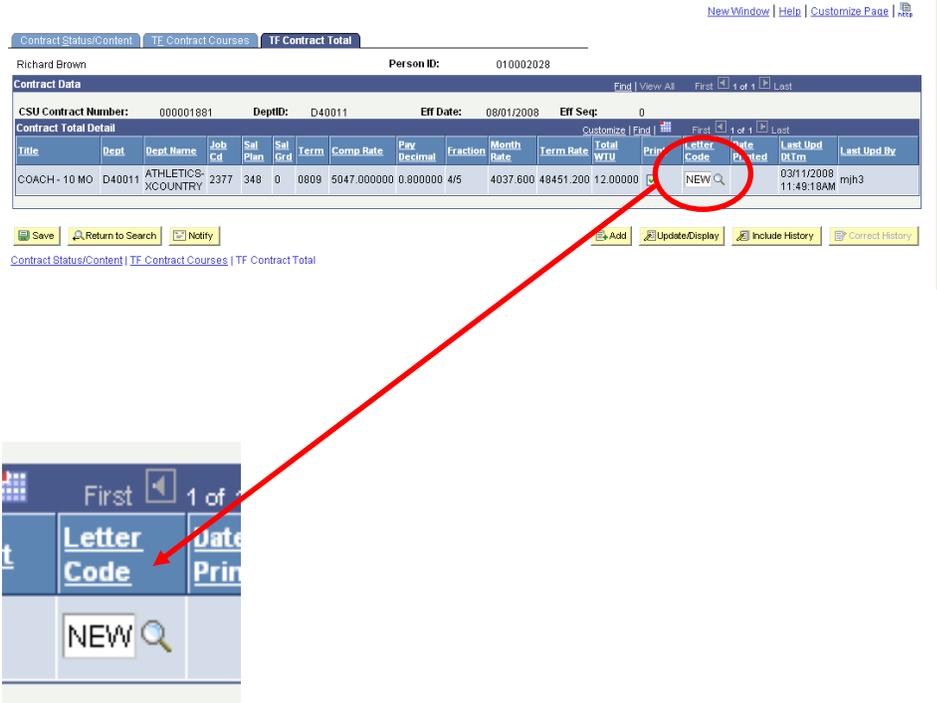
Processing Steps	Screen Shot
<p><u>Course Assignments:</u></p> <p>Skip Course Assignments Section.</p> <p><u>Other Assignments:</u></p> <p>Under Description, enter the coach working title/assignment.</p> <p>Click the TF Contract Total Tab on the top of the page.</p>	<p>The screenshot shows the 'TF Contract Courses' tab selected. At the top, there are three tabs: 'Contract Status/Content', 'TF Contract Courses', and 'TF Contract Total'. The 'TF Contract Courses' tab is active. Below the tabs, the user's name 'Richard Brown' and 'Person ID: 010002028' are displayed. The 'Contract Data' section shows 'CSU Contract Number: 000001881', 'DeptID: D40011', 'Eff Date: 08/01/2008', and 'Sequence: 0'. The 'Contract Detail' section shows 'Position Nbr: 00020963', 'COACH - 10 MO', 'Bus Unit: HMCMP', 'Department: D40011', 'ATHLETICS-XCOUNTRY', 'Job Code: 2377', 'Plan/Grade: 348 / 0', 'Term: 0809', 'Cycle: 1', 'Late Start: N', 'Academic Days Paid:', 'Total WTU: 12.00000', and 'Comp Rate: 5047.000000'. The 'Course Assignments' table has one row with 'Class Nbr: 1', 'Subject Area', 'Catalog Nbr', 'Description', 'Section', 'K/S', 'K Factor', 'Units', '#Students', and 'WTU: 0.000000'. The 'Other Assignments' table has one row with 'Assignment Type', 'Reason Code', 'Time Source', 'Academic Org/Dept', 'WTU: 0.000000', and 'Description: Cross Country Coach'. The 'Description' field is circled in red. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A navigation bar at the bottom shows 'Contract Status/Content TF Contract Courses TF Contract Total'.</p>

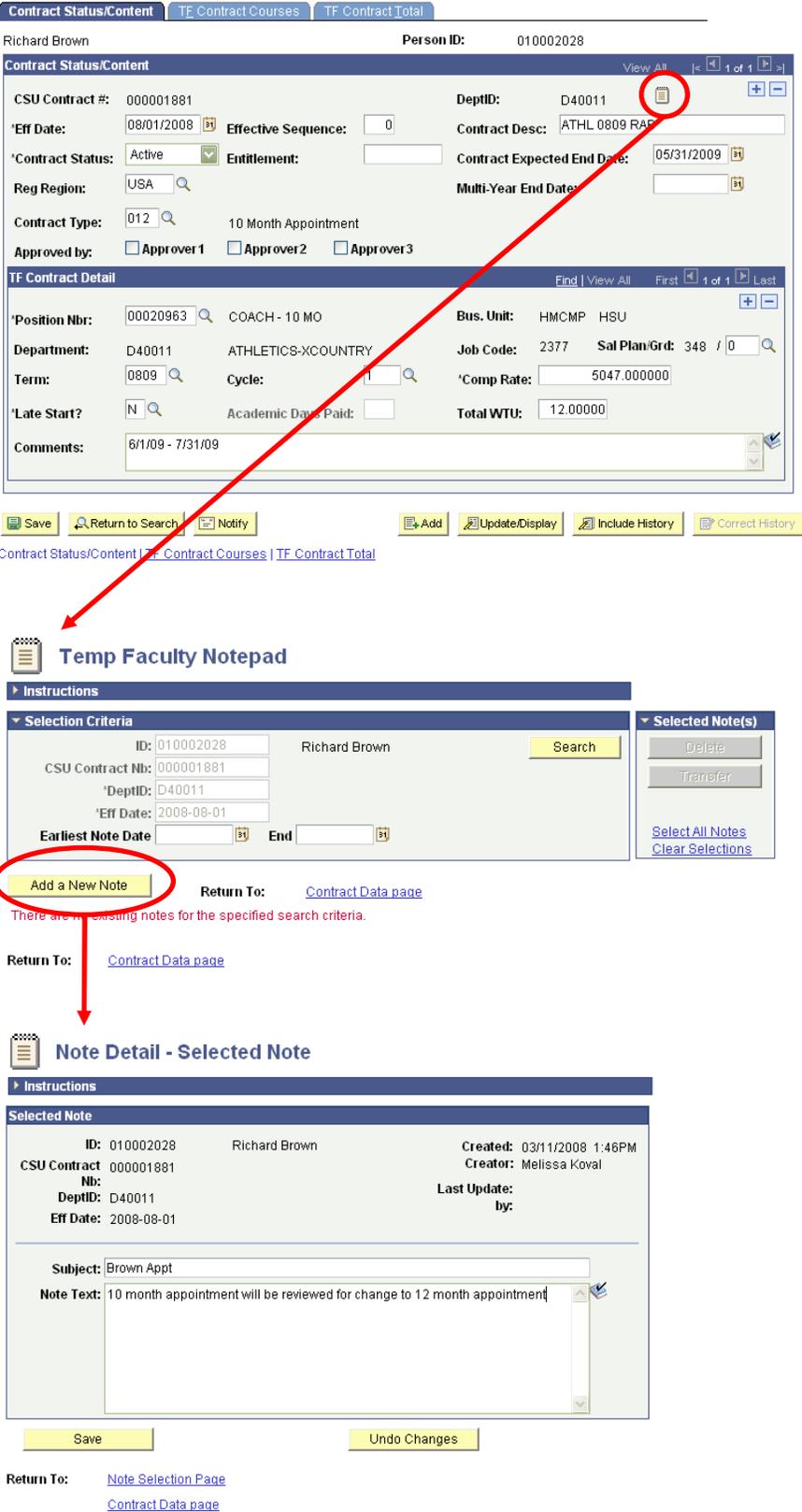
TF Contract Total Page Steps

Use this page to review all of the contract information entered and to prepare the record for printing the Coach Transaction Form. Contracts may be printed either in a “batch” as a group, or individually.

- 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 to designate new (NEW), revised (REV), and cancelled (CNC) appointments. 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 using either Batch Print or Individual Print (see Guide). After the director approves and signs, forward the original to the Office for the VPSA. 	 <p>The screenshot shows the 'TF Contract Total' tab for Richard Brown (Person ID: 010002028). The 'Contract Data' section includes CSU Contract Number: 000001881, DeptID: D40011, Eff Date: 08/01/2008, and Eff Seq: 0. Below is a table with columns: 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, Date Entered, Last Used D/T/M, and Last Used By. The 'Letter Code' column contains 'NEW' and is circled in red. Below the table are buttons for Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History. A zoomed-in view of the 'Letter Code' input field is shown below, with a red arrow pointing to the 'NEW' text.</p>

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 appt, may be entered here. The note will not be printed on the Coach Transaction Form. ❏ 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>8. Enter any notes about the appt. Any notes added here will not print on the contract, but will be available for Athletics, APS or VPSA to view.</p> <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>The screenshot displays the 'Contract Status/Content' page for Richard Brown (Person ID: 010002028). The 'Contract Status/Content' section shows details for CSU Contract # 000001881, DeptID D40011, and Eff Date 08/01/2008. A red circle highlights a notepad icon in the top right corner of this section. A red arrow points from this icon down to the 'Temp Faculty Notepad' section, where the 'Add a New Note' button is circled in red. Another red arrow points from the 'Add a New Note' button down to the 'Note Detail - Selected Note' section, which shows a note with the subject 'Brown Appt' and text '10 month appointment will be reviewed for change to 12 month appointment'.</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.

Contract Type

Contract Type	Description
001	Academic Year Appointment
002	12-Month Appointment
012	10-Month Appointment

Contract Dates for 2008-09

Duration of Appointment	Contract Type	Appointment Begin and End Dates *
Academic Year Appointment	001	8/18/2008 - 5/20/2009
12-Month Appointment	002	7/1/2008 - 6/30/2009
10-Month Appointment	012	7/31/2008 - 5/31/2009

** Whenever possible, appointment begin and end dates should coincide with pay period dates*

TF Contract Total Page

Letter Code

Code	Action	Description
NEW	New appt	1 st contract for the academic year.
REV	Revised appt	Revised contract – any change after the 1 st contract.
CNC	Cancelled appt	Cancelled appt – if the initial contract has been processed.



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 – D4xxxx.
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 Student Affairs and/or APS.
Effective Date	The start date of the temporary appointment (when the contract becomes or became <u>effective</u> .)
Effective Sequence	The sequence number. Defaults to 0 for new appts. You will increment 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 appointment would have an effective date the 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 coach format is: "ATHL (in caps) Year (4 digits) Coach Initials". For example, a coach contract for Michael Alan Bradshaw would be: ATHL 0809 MAB.
Contract Status	Status of the contract. Defaults in as 'Active'. See Contract Status Values .
Entitlement	Ignore – not used for coaches.
Contract Expected End Date	The end date of the temporary appt for the current year.
Reg Region	The Regulatory Region – defaults as 'USA' – ignore.
Multi-Year End Date	Ignore – not used for coaches.
Contract Type	Identifies the type of appt. See Contract Type Values .
Approved by	Ignore – not used by HSU.
Position Number	The dept's specific coach position #s.
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.)
Job Code	Ignore – automatically populates when the position # is entered.
Salary Plan/Grade	Automatically populates when the position # is entered. This number should be 0 for all coaches.
Term	The term of the appointment. For 2008/09, the 4-digit term is 0809.
Cycle	Defaults in as '1'. The cycle can be used to divide the semester into segments. HSU uses only '1'.
Comp Rate	The coach full-time monthly salary rate. Whenever a row is added to the contract (because of a revision, for example) the comp rate will automatically update from the current rate in Job Data.
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). For these appts, select "L" for Late start.



Field	Definition
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 coach should be paid.
Total WTU	The total weighted teaching units of the appt. The system will calculate the pay decimal based on the WTUs entered here.
Comments	Free form text field used to identify two months off for 10-month coach appointments.

TF Contract Courses Page

Field	Definition
Other Assignments: Description	Description of the assignment – coach working title. Ignore all other fields on page – not used for coaches.

TF Contract Total Page

Field	Definition
Comp Rate	The coach full-time monthly salary rate.
Pay Decimal	FTEF. Calculates by dividing the total WTUs by 15. Used to compute Monthly Rate.
Fraction	Pay fraction. Calculates 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 Contract Status/Content page.
Monthly Rate	Monthly salary. Calculated by multiplying the full-time monthly salary rate by the Pay Decimal.
Term Rate	Total pay for the appointment.
Letter Code	Identifies new, revised, or cancelled appointments.
Date Printed	The date the Contract 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 Coach 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. A red arrow points from the top screenshot to the bottom one, indicating the addition of 'Add to Favorites' and 'Edit Favorites'.</p> <p>Top Screenshot (Initial State):</p> <ul style="list-style-type: none">My Favorites<ul style="list-style-type: none">- CSU ID Search- Add a Person- Contracts- Contract Batch Print- Contract Individual Print- Add to Favorites- Edit Favorites <p>Bottom Screenshot (Final State):</p> <ul style="list-style-type: none">My Favorites<ul style="list-style-type: none">- CSU ID Search- Add a Person- Contracts- Contract Batch Print- Contract Individual Print- Add to Favorites- Edit Favorites