CMS Project Management Office

HCM 9.0 Business Process Guide
Revise a Temporary Faculty Contract

Last Revised: **09/26/2012**

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REVISION CONTROL

Document Title:	Revise a Temporary Faculty Contract Business Process Guide
Author:	S. Deffenderfer
File Reference:	

Date	By	Action	Pages
5/22/2007	S. Deffenderfer	Release of New Document	All
8/17/2007	S. Deffenderfer	Correction to cancelled contract instructions	7
11/06/2007	S. Deffenderfer	"LTF" replaced with "Transaction Form" to reflect multiple types of appointments.	All
9/26/2012	C. Marshall	Updated and revised entire document for 9.0 upgrade and changes	All

Introduction

The CSU Temporary Faculty Contract Data component is used to process appointment data for lecturers.

In general, the HCM 9.0 Business Process Guides should be used in the following order:

- CSU ID Search
- Add a Person of Interest (only if new hire)
- Create a Temporary Faculty Contract
- Temp Faculty Contract – Batch Print
- **Revise a Temporary Faculty Contract**
- Temp Faculty Contract – Individual Print

The guide listed in bold is the guide you are working on now.

Overview

Revisions to lecturers' appointments include:

- Revisions that affect pay – e.g. increase or decrease in time base;
- Cancelled appointments.
- Changes in the lecturer's course assignment that do not affect pay – e.g. the courses change, but the total WTUs are the same;
- Corrections to data entry errors;

A revision that occurs **before** the Transaction Form is sent to the Dean, can be done using the Correct History function. Correct History overwrites the data previously entered on the contract. This is also the method used to make changes to course assignments only when time base is **not** affected.

A revision that occurs **after** the Transaction Form is sent to the Dean and is due to changes in time base (increases or decreases) or salary are done by inserting another row, with a new effective sequence number, and updating the contract data. This is also the method used to cancel an appointment.

After the corrections/revisions/cancellations have been completed, a new Lecturer Transaction Form is printed and processed.
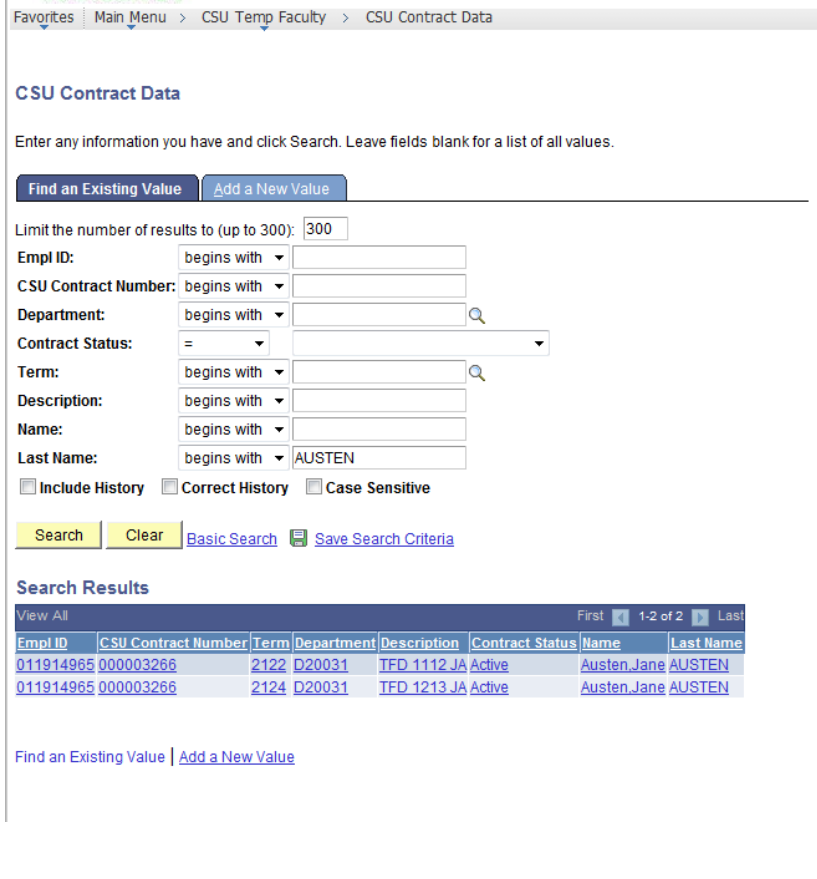
Revising a Temporary Faculty Contract

The first step in Revising a Temporary Faculty Contract is to navigate to the **CSU Contract Data** page and search for the existing contract.
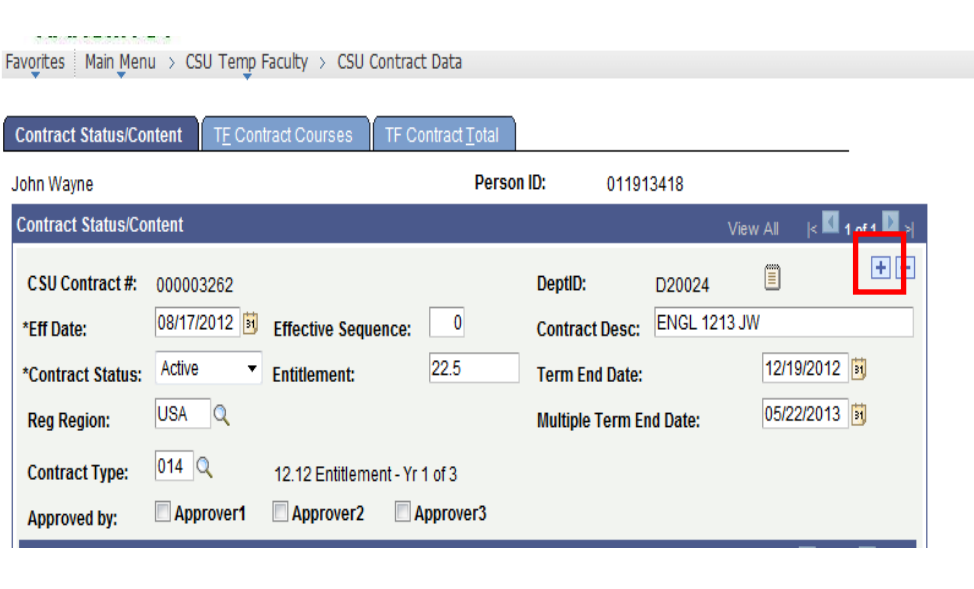
Please see the *Create a Temporary Faculty Contract* guide for more detailed information and field definitions.

Navigation: CSU Temp Faculty → CSU Contract Data

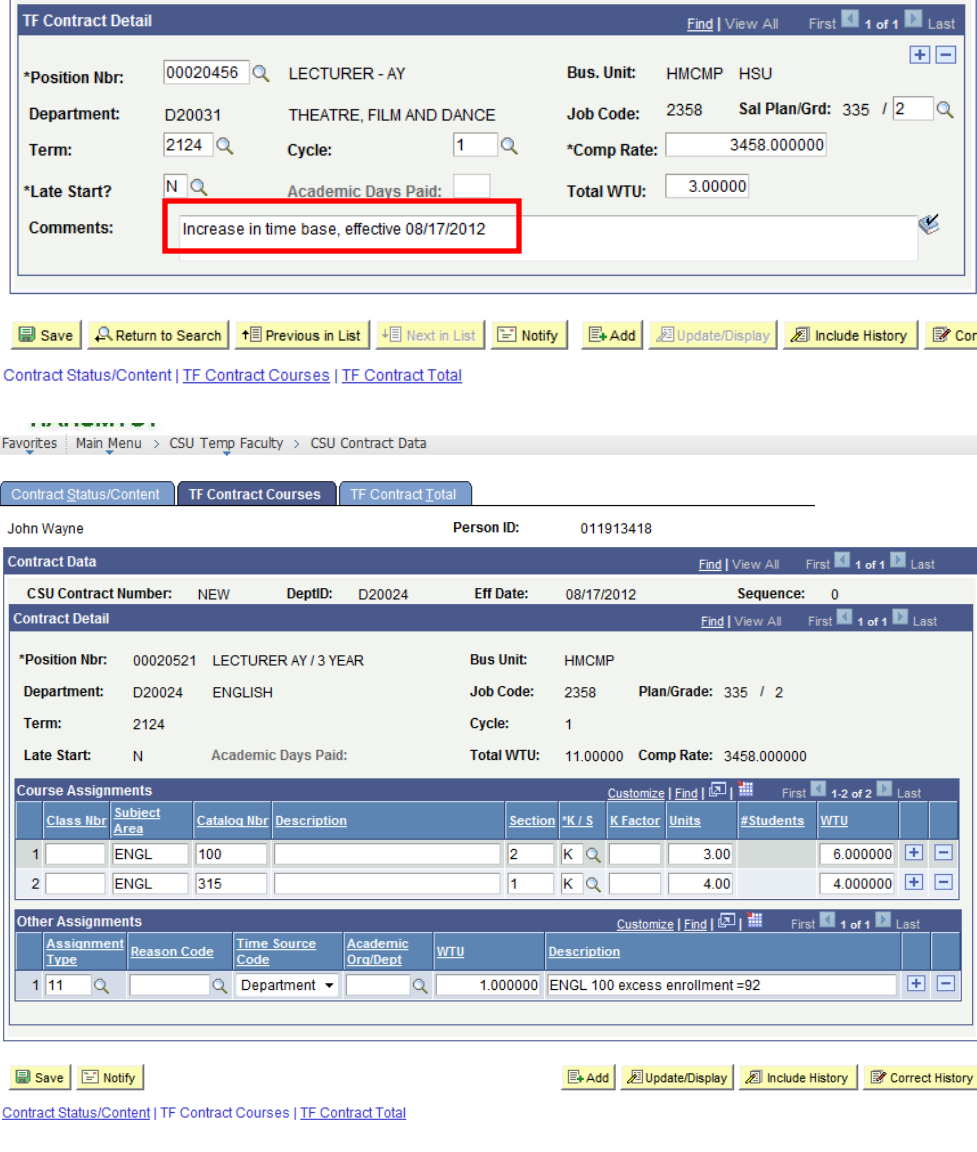| Processing Steps	Screen Shot
1. Click on Find an Existing Value 2. Enter one or more of the following Search Criteria (e.g. Last Name, Empl ID, Department). 3. Click on the **Search** button. 4. Select the contract you wish to revise. The Contract Status/Content page displays.	Favorites Main Menu > CSU Temp Faculty > CSU Contract Data **CSU Contract Data** Enter any information you have and click Search. Leave fields blank for a list of all values. **Find an Existing Value** Add a New Value Limit the number of results to (up to 300): 300 **Empl ID:** begins with ▾ **CSU Contract Number:** begins with ▾ **Department:** begins with ▾ **Contract Status:** = ▾ **Term:** begins with ▾ **Description:** begins with ▾ **Name:** begins with ▾ **Last Name:** begins with ▾ AUSTEN ☐ Include History ☐ Correct History ☐ Case Sensitive Search Clear	Basic Search Save Search Criteria **Search Results** View All First ◀ 1-2 of 2 ▶ Last **Empl ID	CSU Contract Number	Term	Department	Description	Contract Status	Name	Last Name** 011914965 000003266 2122 D20031 TFD 1112 JA Active Austen,Jane AUSTEN 011914965 000003266 2124 D20031 TFD 1213 JA Active Austen,Jane AUSTEN Find an Existing Value	Add a New Value

Navigation: CSU Temp Faculty → CSU Contract Data

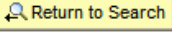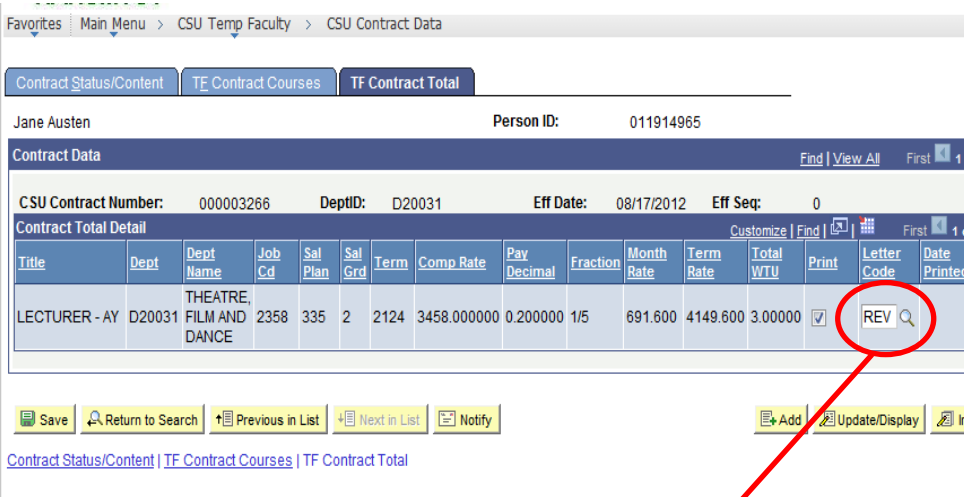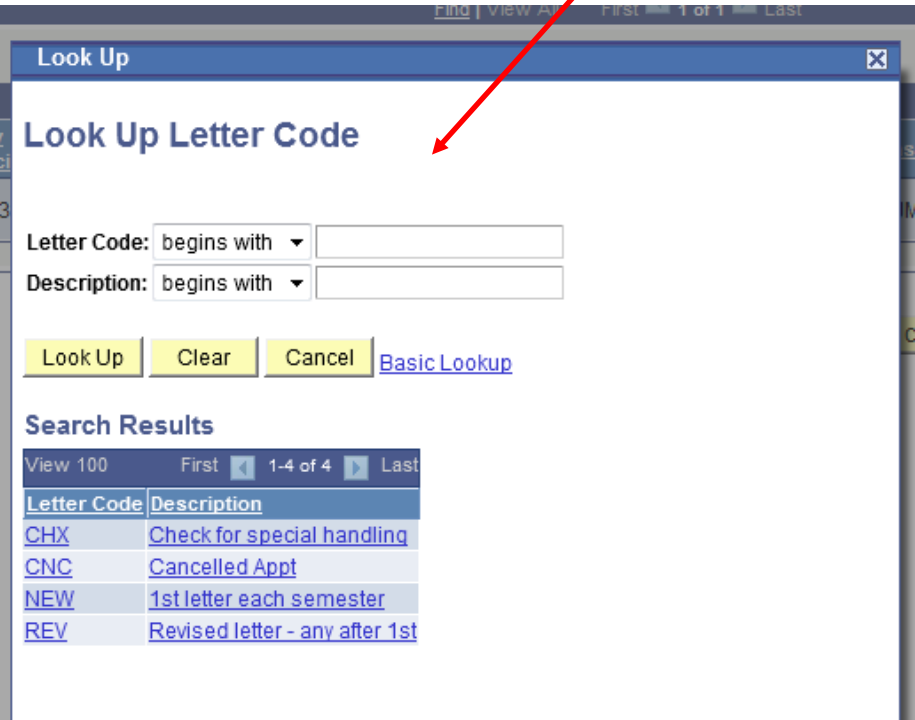| Processing Steps	Screen Shot

Contract Status/Content Page
 	
To revise or cancel a contract (after the Transaction Form has been sent to the Dean), you must insert a new contract row:
 	
1. Click on the ⊞ button to insert a new row.
   • The contract data you entered in the previous appointment will default forward into the new row.
2. The **Effective Date** only defaults to the current date which may not be correct.
   • Check and edit the **Effective Date** if needed. Change the date to the correct date for the revision.
	Favorites Main Menu > CSU Temp Faculty > CSU Contract Data
	
	Contract Status/Content TF Contract Courses TF Contract Total
	
	John Wayne Person ID: 011913418
	
	Contract Status/Content View All ◀ 1 of 1 ▶
	
	CSU Contract #: 000003262 DeptID: D20024 ⊞ ⊟
	*Eff Date: 08/17/2012 Effective Sequence: 0 Contract Desc: ENGL 1213 JW
	*Contract Status: Active Entitlement: 22.5 Term End Date: 12/19/2012
	Reg Region: USA Multiple Term End Date: 05/22/2013
	Contract Type: 014 12.12 Entitlement - Yr 1 of 3
	Approved by: ☐ Approver1 ☐ Approver2 ☐ Approver3

Processing Steps	Screen Shot
3. Change the **Effective Sequence** • The Sequence defaults to 0. Every contract revision with the same effective date must have a new sequence number – increase the sequence by 1. • Click on **View All** on the Contract Status/Content navigation bar to see all previous contract rows and the last sequence #. • The Effective Date and the Effective Sequence work in combination to differentiate each contract revision. One or the other must be different than on the original appointment. If the Effective Date of the revision is different than that of the original appointment, the Effective Sequence remains at 0. If the Effective Date of the revision is the same the Effective Sequence is increased by one. 4. Enter a note on the **Notepad** explaining the reason for the revision.	Favorites Main Menu > CSU Temp Faculty > CSU Contract Data Contract Status/Content TF Contract Courses TF Contract Total John Wayne Person ID: 011913418 **Contract Status/Content** View All |< ◄ 1 of 1 ► >| CSU Contract #: 000003262 DeptID: D20024 *Eff Date: 08/17/2012 Effective Sequence: 0 Contract Desc: ENGL 1213 JW *Contract Status: Active Entitlement: 22.5 Term End Date: 12/19/2012 Reg Region: USA Multiple Term End Date: 05/22/2013 Contract Type: 014 12.12 Entitlement - Yr 1 of 3 Approved by: ☐ Approver1 ☐ Approver2 ☐ Approver3 Favorites Main Menu > CSU Temp Faculty > CSU Contract Data 📝 **Temp Faculty Notepad** ▶ Instructions ▼ Selection Criteria ▼ Selected Note(s) ID: 011913418 Search Delete CSU Contract Nb: 000003262 *DeptID: D20024 Select All Notes *Eff Date: 2012-08-17 Clear Selections Earliest Note Date: ____ End ____ Add a New Note Return To: Contract Data page Existing Notes Customize	Find	📄 DeptID	Eff Date	Created	Subject	Select D20024	2012-08-17	09/14/2012 2:16PM	Excess Enrollment	☐ Return To: Contract Data page

Processing Steps	Screen Shot
5. Enter a **Comment** (see standard comments) stating the reason for the revision, e.g. Increase in time base. This will print on the transaction form. Click on the **TF Contract Courses** tab 6. To make changes to <u>Course Assignments</u> and (<u>Other Assignments</u>): • Click the ⊞ to add another course. • Click the ⊟ to delete a course. 7. Continue with corrections to the course assignments, as appropriate. • Refer to the ***Create a Temporary Faculty Contract*** guide for further instructions and field definitions if needed.	

Processing Steps	Screen Shot
TF Contract Total Page Review your revisions. If any data needs to be corrected, return to appropriate page and re-enter. 1. Accept the default for the **Print** flag. 2. Enter the **Letter Code**: REV • This notifies APS to send a revised appointment notification to the lecturer. 3. Click the [Save] button. • Once the contract has been saved, any corrections to this contract row must be done in **Correction Mode**, using [Correct History]. 4. Return to Search [Return to Search] to access the main Search page. 5. Print the Transaction Form using either Batch Print or Individual Print (see Guide). After the dept chair approves and signs, give a copy to the lecturer and forward the original to the College.	

Cancelled Contracts

To cancel a lecturer's appointment, use the same steps as for a contract revision:

Search for the contract using "Find an Existing Value";

Select the contract to be cancelled.

On the **Contract Content/Status** page:

Top section (*Contract Content/Status*):

➢ Insert a row with a new effective sequence number (increased by 1 from the previous row).

➢ Add a note on the **Notepad**, explaining the reason for the cancellation.

➢ Change the **Contract Status** to **Cancelled**.
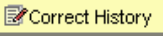
Bottom section (*TF Contract Detail*):

➢ Reduce WTUs to **0**

➢ In the **Comments** section, enter: "**Cancel appt**."

On **TF Contract Courses** page *do not* change courses or WTUs

On the **TF Contract Total** page, confirm that the WTUs display as "0".

➢ Enter the **Letter Code** of **CNC** for APS to send the cancelled appointment notification.

Print and process the transaction form.

Correction Mode

Once the contract is saved, you must be in **Correction Mode (**using [Correct History] **)** to update or revise information on the **Contract Status/Content** and **TF Contract Courses** pages.

Correction Mode allows you to overwrite the data you have previously entered. This should be used only to correct data errors before the Transaction Form has been sent to the Dean, or to make changes to course assignments that don't affect pay.

The lecturer's contract record should reflect a history of the initial appointment, and all revisions. When Correct History is used, the original data is lost.

CAUTION: The Correct History button will "gray out" when clicked, to indicate you are working in Correction Mode. You will stay in Correction Mode until you uncheck the Correct History box on the Search page, or until you leave the current session (log out of PeopleSoft).

Once you have made your corrections to the contract, print and process a new transaction form.

If in doubt about whether or not to use correction mode, insert a new row and process your change as a revision.

Change in Course Assignment only

For changes to course or other assignments that do not affect pay, i.e. the total WTUs remain the same, use **Correction Mode**.

On the **Contract Content/Status** page, enter **"Change in assignment only"** in the **Comments** section.

On the **TF Contract Courses** page, add, delete or change course assignments.

On the **TF Contract Total** page, confirm that there is no change to the lecturer's time base and salary.

Print and process the transaction form.

(Note that APS will not send another appointment notification to the lecturer for an assignment change.)

Tables of Valid Values (partial)

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 (see Revise Temporary Faculty Contract Guide for more information.)

Comments

The Comments field replaces some of the information formerly entered on the Transaction Form. All Comments will print on the Form.
For new contracts, indicate whether the employee is a "new hire" or a "rehired annuitant".
For revised contracts, indicate the reason for the revision, as follows:

Comment	Type	Definition/Use
New hire	New	A new lecturer appt. May have worked on campus previously, (e.g. TA), but is new to the lecturer category. Forward copy of the vita with Transaction Form.
Rehired annuitant	New	Any faculty member (lecturer or tenured) who is being appt'd after retirement (NOT FERP). Total WTUs for the year shall not be more 50% of the WTUs taught in the fiscal year prior to retirement.
Increase in time base, effective xx/xx/xx	Revised	Enter the date that the increase in pay becomes effective, normally the beginning of the semester.
Decrease in time base, effective: xx/xx/xx	Revised	Enter the date that the decrease in pay becomes effective, normally the beginning of the semester. To avoid overpayments to the lecturer, process these as soon as possible, and notify APS.
Cancel Appt	Revised	Reduce WTUs to 0 on the Contract Status/Content page.
Change in assignment only	Revised	Use when course assignment is changed, but the WTUs remain the same – i.e. no change to pay. Use Correct History to change the course assignment.

TF Contract Total Page

Letter Code

Enter a letter code to inform APS which appt notification to send to the lecturer.

Code	Action	Description
NEW	New appt	1st appt letter for each semester.
REV	Revised appt	Revised contract – any change after the 1st letter.
CNC	Cancelled appt	Cancelled appt – if the initial contract has been processed.
CHX	Special handling	For any contract that needs special processing – not normally used at Department level