



CMS Project Management Office

HCM 9.0 Business Process Guide Create a Temporary Faculty Contract

Last Revised: 11/1/2013



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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 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 (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


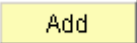

The first step in Creating a New Temp Faculty Contract is to navigate to the correct PeopleSoft page and enter the appointment information for the contract.

Create a New Temp Faculty Contract

The CSU Temporary Faculty Contract Data component is used to process appointment data for lecturers. Once entered, this data is used by the Department to print the Lecturer Transaction Form (LTF), by APS to generate the lecturer’s appointment notification email, and by Payroll to complete the hiring process.

- ❗ To create a contract, the lecturer 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 lecturer’s appointment. The “contract” that is printed at the end of this process is still called a Lecturer Transaction Form (LTF). At the end of the process, the lecturer will receive an email appointment notification from APS. For our purposes, the “contract” conveys the details of the lecturer’s 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 . (Important: if employee already has a contract from previous semester you would use Find Existing Value and stack on top of previous contract by adding a row, see Stacking Process Flowchart) 2. Enter Empl ID. <ol style="list-style-type: none"> 1. 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. D20003 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 '010025623', 'CSU Contract Number:' with the value 'NEW', and 'Department:' with the value 'D20003'. Each input field has a magnifying glass icon to its right. At the bottom of the form is a yellow 'Add' button. Below the form, there are two links: '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 lecturer's appointment, including the beginning and ending dates, type of appointment, compensation, position number, term, WTUs and any comments.

Note: Because of your security access, you are limited to creating contracts only for your department(s).

- ❗ Contracts are created one semester at a time. For an academic year appt, you first create the contract for fall semester. At a later date, you will add a row and stack the contract for next semester worked or revisions.
- ❗ 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.

*** This guide is written for creating lecturer contracts. Fields with *** indicate special instructions for FERP, TA and GA contracts, found on Page 6 – Special Instructions for FERP, GA and TA Appointments.

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, normally, the first day of the semester. <ul style="list-style-type: none"> ➢ 8/xx/20xx- Fall; 1/xx/20xx-Spr The Effective Date will default to the current date. Override it by manually entering the correct date, if necessary. Accept the Effective Sequence default of 0. Enter the Contract Description*** <ul style="list-style-type: none"> • The format for the HSU Contract Description is: DEPT AY Lecturer's Initials e.g. ENGL1213 JW Accept the default Contract Status of "Active". <ul style="list-style-type: none"> • HSU uses only "Active" or "Cancelled" Enter the Entitlement WTUs for lecturers that have a AY or 3YR appt (Dept entitlement sheet is provided by APS). The entitlement WTUs is for the year. Format = ##.# Enter the Term End Date***. The term end date is the end of the semester, regardless of the type of appointment. <ul style="list-style-type: none"> ➢ 12/xx/20xx- Fall ➢ 05/xx/20xx-Spring 	<p>The screenshot displays the 'Contract Status/Content' page for John Wayne (Person ID: 011913418). It is divided into two main sections: 'Contract Status/Content' and 'TF Contract Detail'. Contract Status/Content: - CSU Contract #: NEW - *Eff Date: 08/17/2012 (calendar icon) - Effective Sequence: 0 - *Contract Status: Active (dropdown) - Reg Region: USA (lookup icon) - Contract Type: 014 (lookup icon) - 12.12 Entitlement - Yr 1 of 3 - Approved by: Approver1, Approver2, Approver3 (checkboxes) - DeptID: D20024 - Contract Desc: ENGL 1213 JW - Term End Date: 12/19/2012 (calendar icon) - Multiple Term End Date: 05/22/2013 (calendar icon) TF Contract Detail: - *Position Nbr: 00020521 (lookup icon) - LECTURER AY / 3 YEAR - Department: D20024 ENGLISH - Term: 2124 (lookup icon) - Cycle: 1 (lookup icon) - *Late Start?: N (lookup icon) - Academic Days Paid: [] - Bus. Unit: HMCMP HSU - Job Code: 2358 - Sal Plan/Grd: 335 / 2 (lookup icon) - *Comp Rate: 3458.000000 - Total WTU: 0.00000 - Comments: New Hire (text area) At the bottom, there are buttons for Save, Notify, Add, Update/Display, Include History, and Correct History.</p>



Processing Steps	Screen Shot
<p>7. Accept the Regulatory Region default of "USA".</p> <p>8. Enter the Multiple Term End Date</p> <ul style="list-style-type: none"> This is the end date of a lecturer's AY or 3 year appt, if semester appt only leave this field blank. See Contract Reminders under Temporary Faculty Contracts AY year for correct dates to use: APS Processing Guides webpage. <p>9. Enter the Contract Type.***</p> <ul style="list-style-type: none"> There are several different contract types depending on the status of the lecturer, e.g. lecturer with semester appt only, AY lecturer, 3 year lecturer in year 1, 3 year lecturer in year 2, etc. Click on for list of all values. For incumbent lecturers, refer to your dept's "Lecturer Entitlement Worksheet" for the correct type of appt. <p>10. Skip the Approved by boxes</p> <p><u>TF Contract Detail:</u></p> <p>11. Enter the Position Number***</p> <ul style="list-style-type: none"> This is the department pool position number for part-time lecturers, or for part-time 3YR lecturers. Each <u>full-time</u> lecturer has unique position numbers. See the "Position Number" table on the APS website. The position # will automatically populate the Business Unit, Department, Job Code, and Sal Plan/Grade. <p>12. Check the Salary Grade ***= the lecturer's range. The default is a "standard" value assigned to the pool position # and could be incorrect. Check with your college for correct salary grade if unknown or accept the default value for college review.</p> <p>13. Enter the Term for the contract.</p> <ul style="list-style-type: none"> Term number = unique four digit code to designate year and semester. Examples: <ul style="list-style-type: none"> > 2124 = Fall 2012 > 2132 = Spring 2013 	<p>The screenshot displays the web application interface for creating a new contract. It shows two main sections: 'Contract Status/Content' and 'TF Contract Detail'. The 'Contract Status/Content' section includes fields for 'CSU Contract #', 'Eff Date', 'Contract Status', 'Reg Region', 'Contract Type', and 'Approved by'. The 'TF Contract Detail' section includes fields for 'Position Nbr', 'Department', 'Term', 'Cycle', 'Job Code', 'Sal Plan/Grd', and 'Total WTU'. Navigation buttons like 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History' are visible at the bottom.</p>



Processing Steps	Screen Shot
<p>14. Accept the Cycle default of "1".</p> <p>15. Enter the Comp Rate = Full time Salary Rate (Monthly Base Pay)</p> <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.) If Comp Rate is unknown, enter 1.00. The College will enter the correct rate after review. <p>16. Accept the Late Start default of "N" HSU does not use.</p> <p>17. Skip Total WTU</p> <ul style="list-style-type: none"> The Total WTU field will populate based on the courses that are entered on the next page TF Contract Courses. NOTE: Total WTUs may never be greater than 15.0. If a lecturer is doing a voluntary overload, overwrite this number to 15.0 <p>18. Enter Comments, if applicable, for either "New hire" or "Rehired annuitant". (Also used for revisions.) Comments will print on the LTF</p> <p>Next Click the TF Contract Courses tab at the top of the page.</p>	<p>The screenshot shows the following data:</p> <ul style="list-style-type: none"> Contract Status/Content: <ul style="list-style-type: none"> CSU Contract #: NEW Eff Date: 08/17/2012 Contract Status: Active Reg Region: USA Contract Type: 014 Approved by: Approver1, Approver2, Approver3 TF Contract Detail: <ul style="list-style-type: none"> Position Nbr: 00020521 Department: D20024 ENGLISH Term: 2124 Cycle: 1 *Comp Rate: 3458.000000 Total WTU: 0.000000 Comments: New Hire



Special Instructions for FERP, GA and TA appointments:

Field	Instructions
Effective Date:	<p>FERP and TA: same as lecturer dates – beginning of semester GA: Fall = 9/1/20xx; Spring = 1/1/20xx</p>
Contract Description:	<p>Same as for Lecturers (Dept AY Initials) with the additional identifier, as follows: FERP: Use FP prior to the contract description to designate a FERP appt ➤ FP ENGL 1213 ABC TA: Use TA prior to the contract description to designate a Teaching Assoc appt ➤ TA BIOL 1213 ABC GA: Use GA prior to the contract description to designate a Graduate Asst appt ➤ GA KRA 1213 ABC</p>
Contract Expected End Date:	<p>FERP and TA: same as lecturer dates – end of semester or end of academic year GA: Fall = 1/30/2013 (may change every year by a day or two based on payday for the month of January (check Green and Gold calendar); Spring = 6/30/2013 (this may also change every year, check Green and Gold calendar.</p>
Contract Type:	<p>FERP, TA and GA: Only 2 contract types are used: ➤ 006 (1 semester appt, normally used) ➤ 001 (academic year appt)</p>
Position Number:	<p>FERP, TA and GA: Use the dept's pool position number for each of these appts. (See the Position Number table on the APS web site, or use the look-up feature.)</p>
Salary Grade:	<p>FERP: Use rank at time of retirement (override if necessary) ➤ 4 (Associate Prof) ➤ 5 (Professor) TA and GA: ➤ 1 (should default in from the position number – double check)</p> <p>All other steps to enter contract data for FERP faculty, Teaching Associates, and Graduate Associates are identical to those for Lecturers. This includes the use of the same letter codes, use of the Notepad, and use of the Comments box to record new hires or changes to timebase, etc.</p>



TF Contract Courses Page Steps




Use this page to enter the lecturer's course assignments and any non-teaching assignments (Assigned Time) to generate the total WTUs for the appt.

- 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>Course Assignments:</p> <p>NOTE: WTUs do not automatically calculate when you enter units and # of sections. You must manually enter these values under the WTU heading.</p> <ol style="list-style-type: none"> Skip Class Nbr. Enter Subject Area e.g. ENGL, PSCI, ENRS etc, Enter Catalog Number = course number e.g. 105, 306 etc. Enter Description (OPTIONAL). e.g. can be used to differentiate special topics courses or for clarity, if desired. Enter Section # = number of sections of each course taught K, S – K-factor. Defaults as K. Change to S if supervised instruction course. Supervised instruction courses must be entered on the first rows of the course assignment section. Enter Class Units = Either the Student Credit Units, OR “per student” unit values for supervised instruction. ➢ .33 for 499; .50 for 699 If an S-factor course is entered, the Students box will display. Enter Students = Enrollment, only for S-factor courses. Enter WTU = Student Credit Units multiplied by mode of instruction (K-factor). ➢ ENGL 050 = 3.9 WTUs (3.0 SCUs x 1.3 K-factor) for remedial instruction. 	



Processing Steps	Screen Shot																																										
<ul style="list-style-type: none"> The total WTUs entered here will populate the WTU field on the first page, Contract Status/Content and on the TF Contract Total page. <p>10. Click the  to add another course. Click the  to delete a course.</p> <p>Other Assignments:</p> <ul style="list-style-type: none"> If appt includes Assigned Time, complete the following: <p>11. Enter Assignment Type = Assigned Time code</p> <ul style="list-style-type: none"> Use the  to search for values or see the Assigned Time Codes on the APS web site. If the appropriate code is not available please put in description of the assigned time. <p>12. Skip Reason Code.</p> <p>13. Enter Time Source Code = funding level. Use drop down box to select correct value.</p> <p>14. Skip Academic Org/Dept.</p> <p>15. Enter WTU value</p> <ul style="list-style-type: none"> The WTUs entered here will be added to the WTUs entered in the Course Assignments section, and will populate the WTU field on the Contract Status/Content page and on the TF Contract Total page. <p>16. Enter Description of assignment: e.g. ENGL100 excess enrollment = 92</p> <p>Next click the TF Contract Total Tab on the top of the page.</p>	<p>Contract Status/Content TF Contract Courses TF Contract Total</p> <p>John Wayne Person ID: 011913418</p> <p>Contract Data Find View All First 1 of 1 Last</p> <p>CSU Contract Number: NEW DeptID: D20024 Eff Date: 08/17/2012 Sequence: 0</p> <p>Contract Detail Find View All First 1 of 1 Last</p> <p>*Position Nbr: 00020521 LECTURER AY / 3 YEAR Bus Unit: HMCMP Department: D20024 ENGLISH Job Code: 2358 Plan/Grade: 335 / 2 Term: 2124 Cycle: 1 Late Start: N Academic Days Paid: Total WTU: 11.000000 Comp Rate: 3458.000000</p> <p>Course Assignments Customize Find First 1-2 of 2 Last</p> <table border="1"> <thead> <tr> <th>Class Nbr</th> <th>Subject Area</th> <th>Catalog Nbr</th> <th>Description</th> <th>Section</th> <th>K / S</th> <th>K Factor</th> <th>Units</th> <th>#Students</th> <th>WTU</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>ENGL</td> <td>100</td> <td></td> <td>2</td> <td>K</td> <td></td> <td>3.00</td> <td></td> <td>6.000000</td> </tr> <tr> <td>2</td> <td>ENGL</td> <td>315</td> <td></td> <td>1</td> <td>K</td> <td></td> <td>4.00</td> <td></td> <td>4.000000</td> </tr> </tbody> </table> <p>Other Assignments Customize Find First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Assignment Type</th> <th>Reason Code</th> <th>Time Source Code</th> <th>Academic Org/Dept</th> <th>WTU</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1 11</td> <td></td> <td>Department</td> <td></td> <td>1.000000</td> <td>ENGL 100 excess enrollment =92</td> </tr> </tbody> </table> <p>Save Notify Add Update/Display Include History Correct History</p> <p>Contract Status/Content TF Contract Courses TF Contract Total</p>	Class Nbr	Subject Area	Catalog Nbr	Description	Section	K / S	K Factor	Units	#Students	WTU	1	ENGL	100		2	K		3.00		6.000000	2	ENGL	315		1	K		4.00		4.000000	Assignment Type	Reason Code	Time Source Code	Academic Org/Dept	WTU	Description	1 11		Department		1.000000	ENGL 100 excess enrollment =92
Class Nbr	Subject Area	Catalog Nbr	Description	Section	K / S	K Factor	Units	#Students	WTU																																		
1	ENGL	100		2	K		3.00		6.000000																																		
2	ENGL	315		1	K		4.00		4.000000																																		
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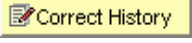

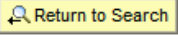
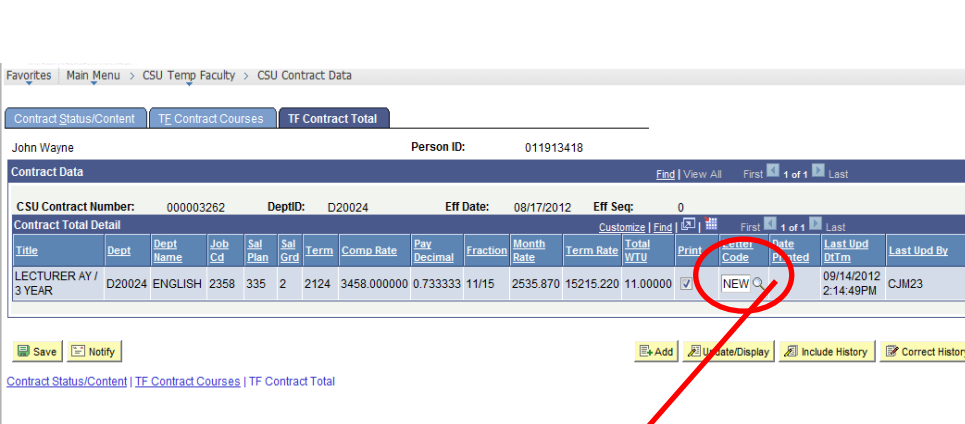
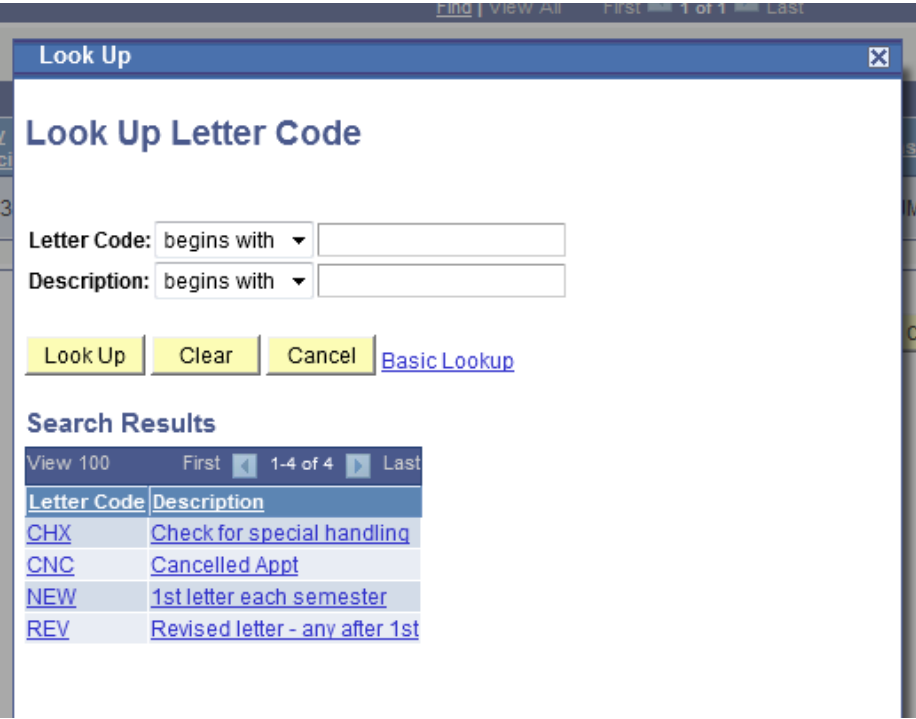



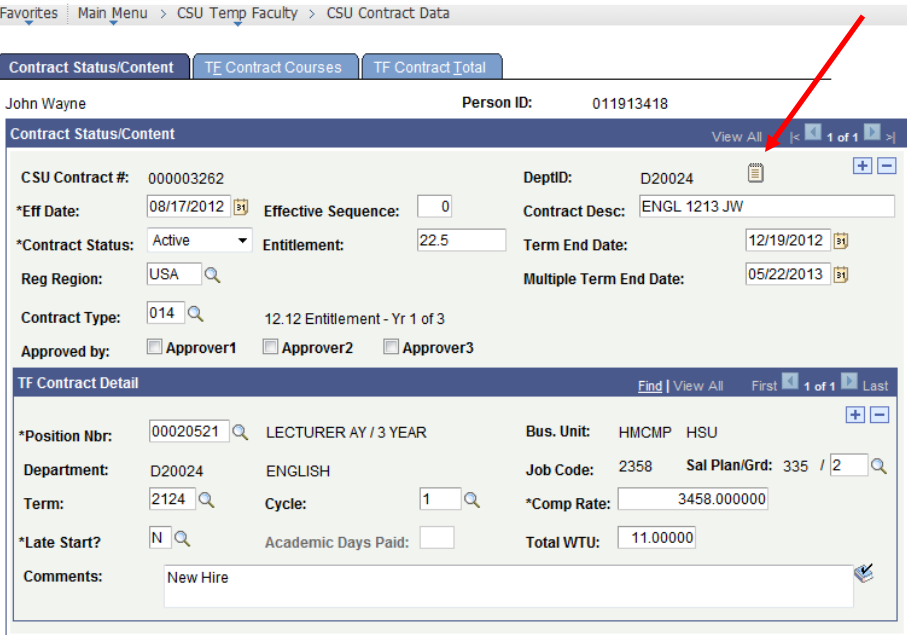
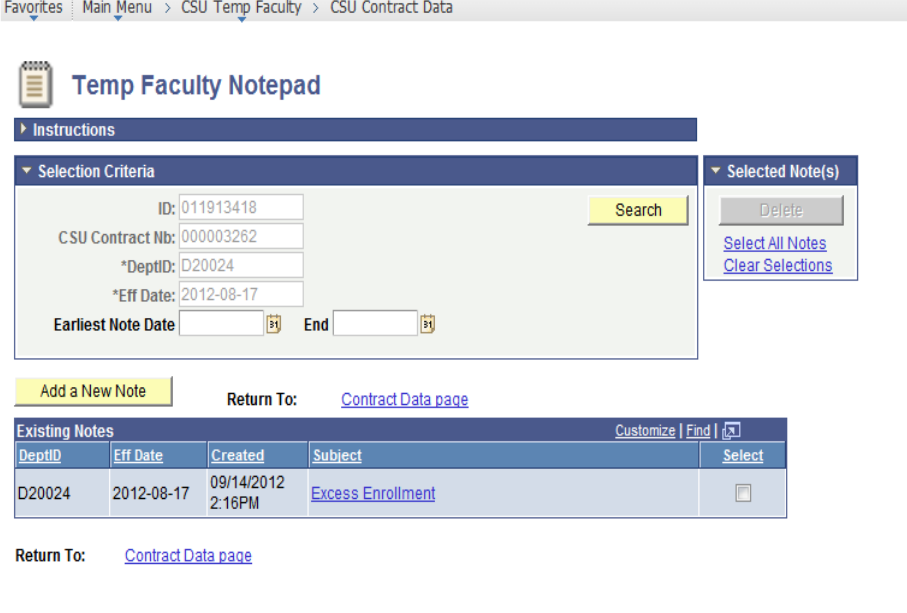
TF Contract Total Page Steps



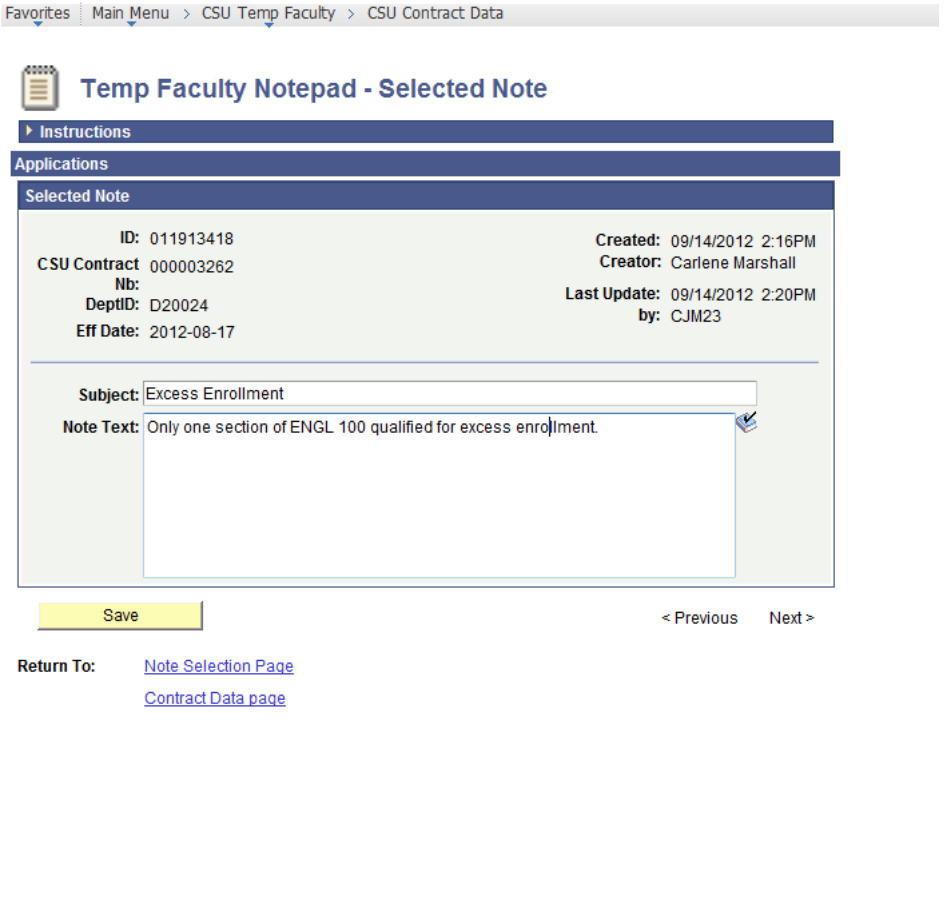
Use this page to review all of the contract information entered and to prepare the record for printing the transaction form. Contracts may be printed either in a "batch", as a group, e.g. for the initial appt process, or individually, e.g. for a revised contract.

- 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 <ul style="list-style-type: none"> The Letter Code is used by APS to determine which type of appt notification to send the lecturer, NEW, REVISED, CANCEL – every contract is NEW at the beginning of each semester. See table for codes on page 13 of this document. Click the  button. <ul style="list-style-type: none"> 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 (LTF) using either Batch Print or Individual Print (see Guides). After the dept chair approves and signs forward the original to the College after giving a copy to the lecturer. 	 <p>Letter codes available:</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 LTF. • 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>The screenshot shows the 'Contract Status/Content' page for John Wayne (Person ID: 011913418). The page includes tabs for 'Contract Status/Content', 'TF Contract Courses', and 'TF Contract Total'. The main content area displays contract details such as CSU Contract # (000003262), Eff Date (08/17/2012), and Contract Desc (ENGL 1213 JW). A notepad icon is visible in the top right corner of the page header, highlighted by a red arrow.</p> <p>Below the contract details, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The page also includes a breadcrumb trail: 'Contract Status/Content TF Contract Courses TF Contract Total'.</p>  <p>The screenshot shows the 'Temp Faculty Notepad' page. It features a search form with the following fields: ID (011913418), CSU Contract Nb (000003262), *DeptID (D20024), *Eff Date (2012-08-17), and date range (Earliest Note Date and End). A 'Search' button is present. To the right, there is a 'Selected Note(s)' section with a 'Delete' button and links for 'Select All Notes' and 'Clear Selections'.</p> <p>Below the search form, there is an 'Add a New Note' button and a 'Return To: Contract Data page' link. A table of 'Existing Notes' is displayed below:</p> <table border="1"> <thead> <tr> <th>DeptID</th> <th>Eff Date</th> <th>Created</th> <th>Subject</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>D20024</td> <td>2012-08-17</td> <td>09/14/2012 2:16PM</td> <td>Excess Enrollment</td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <p>At the bottom, there is a 'Return To: Contract Data page' link.</p>	DeptID	Eff Date	Created	Subject	Select	D20024	2012-08-17	09/14/2012 2:16PM	Excess Enrollment	<input type="checkbox"/>
DeptID	Eff Date	Created	Subject	Select							
D20024	2012-08-17	09/14/2012 2:16PM	Excess Enrollment	<input type="checkbox"/>							

Processing Steps	Screen Shot
<p>8. Enter any notes about the appt., e.g. why an entitlement was not met, especially if the lecturer declined work.</p> <ul style="list-style-type: none">➤ Maternity leave replacement for Louisa May Alcott.➤ Lecturer declined APS 500 for fall semester. <p>9. Click .</p> <p>10. Click on <u>Contract Data page</u> hyperlink to return to the contract. The notepad icon now displays "lines" indicating that a note has been added to this contract.</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 (see Revise Temporary Faculty Contract Guide for more information.)

Contract Type

The Contract Type field is used to identify the type of appointment and entitlement, if applicable. Although contracts are built one semester at a time, the appointment MUST correspond to the lecturer's entitlement. This is done by entering appt begin and end dates for the academic year and by choosing the appropriate contract type.

Contract Type	Description
001	Academic Year Appointment (no entitlement)
003	12.3 Entitlement (Academic Year entitlement)
006	Semester Appointment
010	Summer Session Appointment
014	12.29 Entitlement - Yr 1 of 3 (1 st year of 3 year appointment)
015	12.29 Entitlement - Yr 2 Of 3 (2 nd year of 3 year appointment)
016	12.29 Entitlement - Yr 3 Of 3 (3 rd year of 3 year appointment)

Salary Grade

These values correspond to the Lecturer's salary range (and "rank").

Grade/Range	Appointment Level
1	Lecturer L TA and GA: All
2	Lecturer A
3	Lecturer B
4	Lecturer C FERP: Associate Professor
5	Lecturer D FERP: Professor

Comments

The Comments field replaces some of the information formerly entered on the LTF. All Comments will print on the LTF.

For new contracts, indicate whether the lecturer 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 or over a year break in service. Forward copy of the vita with LTF and non-incumbent justification 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



Comment	Type	Definition/Use
		more 50% of the WTUs taught in the fiscal year (AY) 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	Cancellation	Reduce WTUs to 0 on the <u>Contract Status/Content</u> page. Do not delete the course assignment on the <u>Courses</u> page. Change status and letter code to Cancel and CNC
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.
Out of Area Instructor	New	Use when the instructor does not live locally, and teaches their course or supervises their students remotely.

TF Contract Courses Page

Other Assignments (Assigned Time):

Time Source Code

This value identifies the level at which the assigned time is being “funded”. It is especially important to identify any outside funding – e.g. Reimbursement for grant funded projects.

Time Source Code (Funding Level)
Chancellor
College
Department
University (and Academic Affairs)
Lottery
Reimbursement

TF Contract Total Page

Letter Code

Enter a letter code to inform APS which appt notification to send to the lecturer. (See the Revise Temporary Faculty Contract Guide for more information.)

Code	Action	Description
NEW	New appt	1 st appt letter for the academic year
REV	Revised appt	Revised contract – any change after the 1 st 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

Reminder: this refers to the letter that will be sent to the lecturer; not to the lecturer’s appointment status. For example, the first letter each fall and spring semester will be NEW, whether or not the lecturer is continuing from the previous year/semester, or a brand new lecturer.



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 – D2xxxx
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 the College and/or APS and to document information about the assignment.
Effective Date	The start date of the temporary appointment (when the contract becomes or became <u>effective</u> .) Normally this is the first date of the semester. GA appt dates are different than lecturer dates – see Special Instructions.
Effective Sequence	The sequence number. Defaults to 0 for new appts. You will increase 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 semester would have an effective date 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 format is: "DEPT" (in caps) AY Lecturer's Initials". For example ENGL 1213 LMA – English department ; appointment during the 2012/13 academic year; initials FERP, TA and GA appts: Use appropriate designation before the contract description (see Special Instructions).
Contract Status	Status of the contract. Defaults in as 'Active'. See Contract Status Values .
Entitlement	The total entitlement WTUs for lecturers with either a 3 YR or Academic Year entitlement. The entitlement is expressed as total WTUs for the year, using 1 decimal place: ##.# . (For incumbent lecturers, refer to your dept's APS "Lecturer Entitlement Eligibility Worksheet" for WTUs.)
Term End Date	Normally, this is the last date of the semester for one semester appts and for AY appts. GA appt dates are different than lecturer dates – see Special Instructions.
Reg Region	The Regulatory Region – defaults as 'USA' – ignore.
Multiple Term End Date	For lecturers with 3 YR and AY appts only, leave blank for Semester appts. For AY appts it will be the end to the AY year 05/xx/20xx. The approximate end date of the 3 year appt period depending on what year of their 3 year appt they are in is expressed as 5/15/xxxx. In the 3 rd year of the appt, this date must be changed to match the correct end of the AY.
Contract Type	Identifies the type of appt and the entitlement, if applicable. See Contract Type Values .
Approved by	Not used at department level.
Position Number	The dept's PT pool position # for "non-3YR" <u>part-time</u> lecturers or the dept's 3YR pool position # for <u>part-time</u> 3YR lecturers (See Dept Position Number table on the APS web site); OR , a unique position # for all <u>full-time</u> lecturers – check Job Data for incumbent lecturers, or Form 210 for newly recruited lecturers. <i>Note: Be sure to use the 3YR position # for newly qualified 3YR lecturers.</i> FERP, TA and GA: Depts have a separate pool position # for each of these appt types. See Dept Position Number table or use lookup feature on contract page.
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.)



Field	Definition
Job Code	Ignore – automatically populates when the position # is entered.
Salary Plan/Grade	CHECK! – a default grade (same as lecturer range) that automatically populates when the position # is entered. The Salary Grade is a “generic” value assigned to the position #. You need to enter the correct salary grade that corresponds to the lecturer’s range. See Salary Plan and Grade Valid Values . If unknown (e.g. new hire) leave as the default – after the salary evaluation, College staff will correct. FERP: use rank before retirement; TA and GA: use 1. See Special Instructions.
Term	The semester of the appt – a unique four-digit code made up of the year and semester, e.g. 2124 for Fall 2012 2132 for Spring 2013(First 3 digits represent the year and last is for semester 4 = Fall; 2 = Spring; 3 = Summer)
Cycle	Defaults in as ‘1’. The cycle can be used to divide the semester into segments. HSU uses only ‘1’.
Comp Rate	The lecturer’s full-time monthly salary rate. If unknown, enter 1.00. After the salary evaluation, College staff will correct. Whenever a row is added to the contract (because of a revision or the addition of a Spring appt) the comp rate will automatically update from the current rate in Job Data, reflecting any salary increases since the last contract.
Late Start?	Defaults in as ‘N’ for None – do not change, not used at this time.
Total WTU	The total weighted teaching units of the appt. This will populate based on the course assignments and assigned time entered on the TF Courses page. NOTE: If lecturer is carrying a voluntary overload, overwrite WTUs on front page with 15.0. An appt can never be greater than 1.0 or 15 WTUs.
Comments	Free form text field used to identify new hires, rehired annuitants, and revisions to the appt. This is different than the information entered on the Notepad. See Comments for standard entries.

TF Contract Courses Page

Note: this section is designed to pull data from the course schedule, once we integrate our PeopleSoft Student system. For now, manually enter the course assignment data, as indicated:

Field	Definition
Class Number	Ignore – HSU does not use.
Subject Area	Course subject area, as listed in Banner and the schedule of classes, e.g. WLDF
Catalog Number	Course number, as listed in Banner and the schedule of classes, e.g. 101, 310A
Description	OPTIONAL. Can be used for a course title, e.g. Special Topics courses.
Section	Number of sections of this course assigned to the lecturer
K/S	Defaults in as ‘K’. Change to ‘S’ if for a supervised instruction course in which the WTUs are calculated based on the enrollment, e.g. 499, 690, 699
K Factor	Ignore – HSU does not use.
Units	Student Credit Units for the course. The number of units students receive for the course.
# Students	This field will display if an ‘S’ factor course is entered. Used only with ‘S’ factor courses. The number of students enrolled (or anticipated to be enrolled.) Used to calculate WTUs.
WTU	The total WTUs for each course entered. This field does not automatically calculate the value. You must enter it manually. WTUs equal the Student Credit Units multiplied by the K (or S) factor and then multiplied by the number of sections assigned. Generally for lecture classes, the K factor is 1, so the WTUs and the SCUs are the same. In some cases, e.g. remedial or lab instruction, the K factor is greater than 1. Check the SCACRSE in Banner if you’re unsure of the K factor.
Assignment Type	Assigned Time code used for FAD reporting.
Reason Code	Ignore. HSU doesn’t use at this time.
Time Source Code	The funding source of the assigned time. See Time Source Code Values
Academic Org	Ignore – HSU doesn’t use at this point.
Description	Description of the assignment. For “excess enrollment” assigned time, enter the class and the enrollment, e.g. RS 300, enrollment = 83



TF Contract Total Page

Field	Definition
Comp Rate	The lecturer's full-time monthly salary rate
Pay Decimal	FTEF. Calculated by dividing the total WTUs by 15. Used to compute Monthly Rate
Fraction	Pay fraction. Calculated 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 TF Courses page.
Monthly Rate	Monthly salary. Calculated by multiplying the full-time monthly salary rate by the Pay Decimal.
Term Rate	Total pay for the semester. Calculated by multiplying the Monthly Rate by the Number of Pay Months. Fall semester = 6 pay months (Sept. – Dec.; the last 2 payments are in the following July and Aug.) Spring semester = 6 pay months (Jan. – June.)
Letter Code	Identifies which appt notification APS will send to the lecturer. See Letter Code Values.
Date Printed	The date the Contract (LTF) 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 user id and the date stamp. Will not update if changes to the contract are made using Correct History.