Enter TAE Appointment Data – Lump Sum (021) Additional Employment

Overview

This job aid shows appointment data entry employees how to initiate temporary academic appointments for Additional Employment appointment type 021 – Lump sum payment.

- Search for employees
- Optional: Add new Person
- Enter appointment data
- Adjusting FTE & Effective Dates
- Entering Additional Employment – Quick Sheet
- Appointment editing guidelines
- Appendix: Other Actions
- Additional Employment (AE) Appointment – TAE Submission workflow

Before you begin you will need to:

☐ Know their employment status: Full-time, Part-time, Rehired Annuitant (verify workload limitations), or FERP (ineligible).

☐ Know the position number (available options for your department will be listed)

☐ Know the payment amount

☐ Know the dates, effective start and end date

☐ Create a shareable file for supporting documents in OneDrive.

☐ Ensure faculty have an active SacLink email.

You should be familiar with the following:

- CFA CBA - Article 36 – Additional Employment
- CFA CBA – Article 20 – Workload
- Office of Faculty Affairs – Additional Employment Website

Search for employees

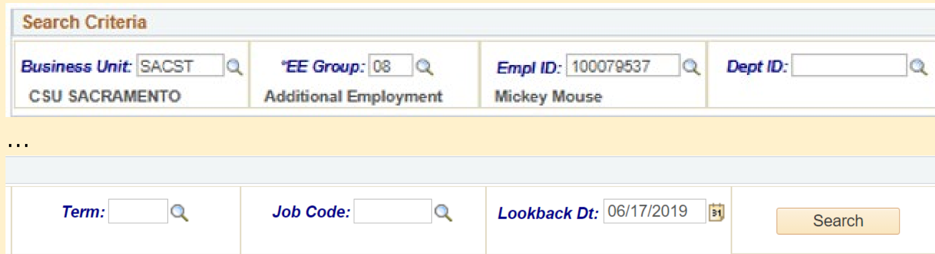
Action	Information
1. Navigate to CSU TAE Appointment Data Entry	Menu > CSU Temp Academic Employment > CSU TAE Appointment Data Entry.

<table>
<tr><th>Action</th><th>Information</th></tr>
<tr><td>

2. Enter search criteria for the employees that you want to retrieve.

- Business Unit (campus)
- EE Group: **08 Additional Employment**
- Empl ID
- Dept ID
- Term
- Job Code
- Lookback Dt

</td><td>



- Verify that the Business Unit is correct
- EE group is required.
- Empl ID: Returns the last row in Job Data, regardless of lookback date limits.
- Dept ID: Returns last Additional Employment row in Job Data under the Dept ID.
- Term: Optional
- Job Code: Optional
- Lookback Dt.: This field is set by default to look back 18 months for employees. You can edit this date.

</td></tr>
<tr><td colspan="2">

Action 2 Notes:

Only employees who are in Job Data are returned. Term & Job Code are not required fields but can be useful if looking for a particular term or appointment. Leaving the Empl ID field blank and keying a Dept ID will return all employees with Additional Employment appointments in Job Data under that Dept ID since the date in the Lookback Dt field. Leaving the Dept ID field blank and keying a Empl ID will return the most recent Additional Employment appoint rows for all Dept IDs.

</td></tr>
<tr><td>

3. Click **Search**.

</td><td>

Search

Employees are retrieved from Job Data. If an employee has worked multiple consecutive jobs, the most recent job is retrieved.

</td></tr>
<tr><td>

4. Review the results

</td><td>

Does your search return a row for the faculty you want to key?

- If not then you will add a new row via "Add new Person".
- If a data row is returned for the faculty you want to key you will need to review that row to determine if you will need to add a new row via "Add new Person" or use the returned row to enter the new appointment data.

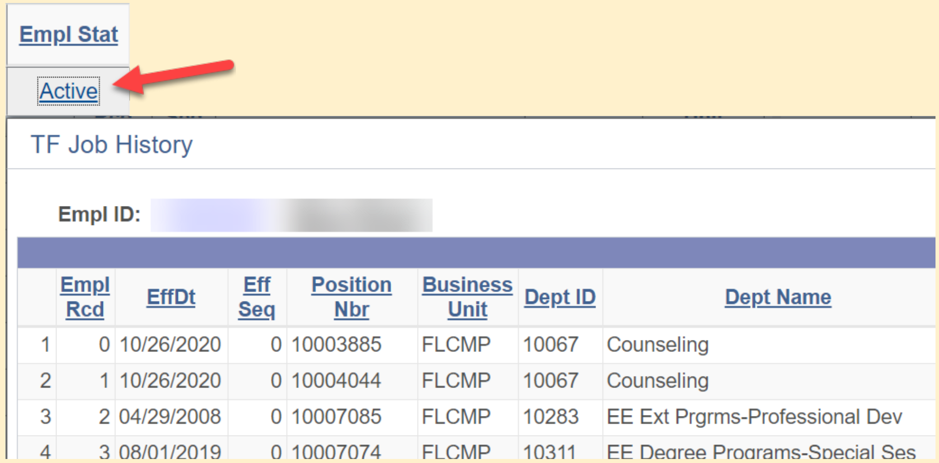
</td></tr>
<tr><td colspan="2">

Action 4 Notes:

If a data row for the faculty you want to key is returned, check the following:

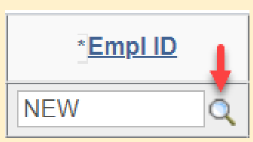
- Does the returned row include effective dates which overlap with the appointment you are attempting to key?
- Is the Dept ID for that row different from the Dept ID you want to use?
- Is the Job Code (2403 or 2359) for that row different than the Job Code you want to use?
  - If **yes** to *any* of the above you will need to add a new row via "Add new Person"
  - If **no** to *all* of the above you can use the returned row to enter the new appointment data.

</td></tr>
</table>

Action	Information
5. <u>**Optional**</u>: Under the **Empl Stat** column you may click the status (Active, Terminated…) value for an employee's work history.	

Optional: Add new Person

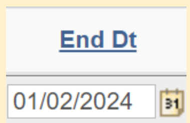
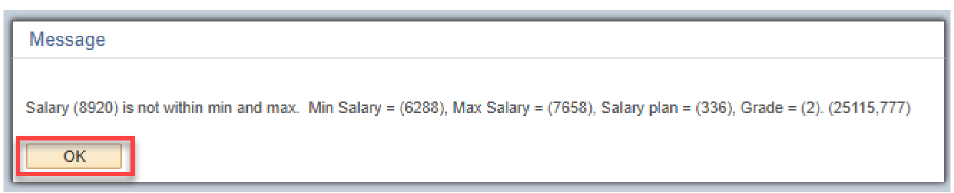
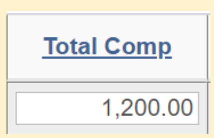
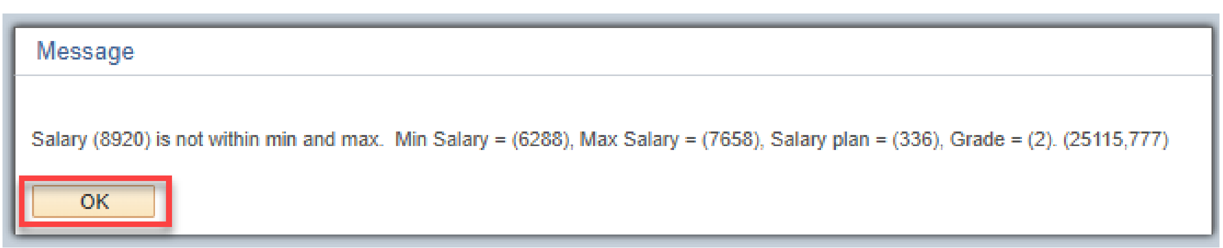
If the employee is not in the search results or you need to add a new row, use this procedure to add an employee record. The employee must already have an Empl ID and SacLink email address.

Action	Information
1. Click **Add new Person.**	 A new row is added to the page.
2. Click the magnifying glass next to **Empl ID** field to search for Empl ID by name.	 Continue to Enter appointment data once a new row has been added.
Action 2 Notes: The TAE Empl ID will be different from a faculty's Sac State Campus ID. The Empl ID populates the Name field. You cannot proceed if the faculty member does not have an EmplID or SacLink email.	

Enter appointment data

- Employee data rows stretch across the page. You must use the scroll bar to see the entire row. This procedure shows fields sequentially from the left to the right of the same row.
- When you select the appointment type, some of the fields change. Be sure to follow the instructions for the correct appointment type.

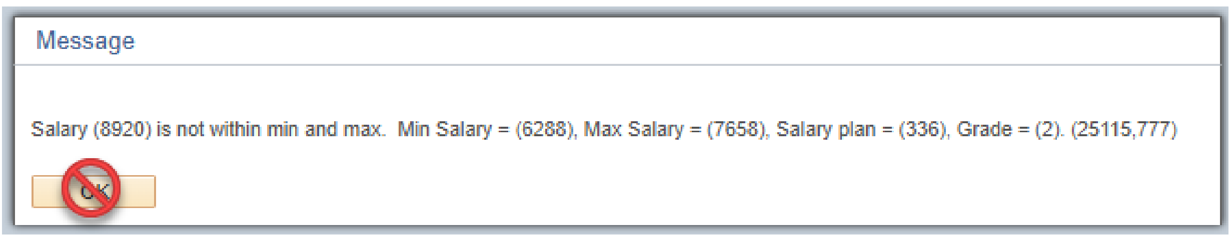
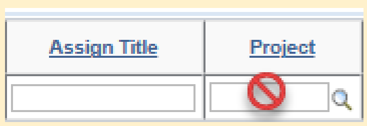
Action	Information
1. Verify and update the **Position Nbr** field, if appropriate.	*Position Nbr 10006468
Action 1 Notes: This field is generally updated if there are funding changes. If updating a row and the current position number is associated with another Dept ID stop, check this employee's other data rows. If none of the employee's rows are associated with the appropriate Dept ID a new row will need to be added via "Add new Person". Only active position numbers are allowed. You can use the magnifying glass next to the position number field to search for position numbers. Search Dept ID using the Department field. Note that each position number is connected to a specific chart-string (fund source) and job code. If one does not exist for the fund source and job code that you need to use one must be created. Do so by following the Budget Office's current process for generating new position numbers.	
Action	**Information**
2. Verify the **Job Code**.	Job Code 2403 The Job Code pulls from the position number.
Action 2 Notes: • For full-time faculty (tenured/tenure-track or lecturers with a 1.00 time base) use a position number with job code **2403**. • For part-time faculty (lecturers with less than a 1.00 time base) and **when the days paid will be 10 days or fewer** use a position number with job code **2359.** For 2359 payments that need to span more than 10 days contact OFA for assistance prior to data entry so that vacation pay amounts can be determined and factored in.	
3. Verify and update the **Grade**, if appropriate.	*Grade 0
Action 3 Notes: Grade will pull from the position number. If the Job Code is 2403 the Grade will always be 0, if the Job Code is 2359 the Grade must match the Grade of their primary position. Verify and update the Grade if appropriate.	

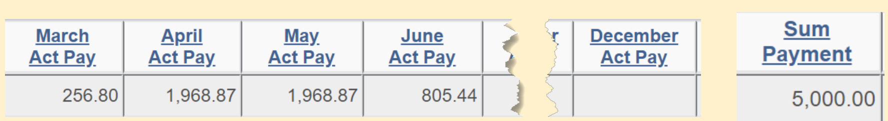
<table>
<tr><th>Action</th><th>Information</th></tr>
<tr><td>4. Click the magnifying glass next to the Appt Type field and select Appt Type 021</td><td>
</td></tr>
<tr><td colspan="2">Action 4 Notes:
Appt. Type is required. For a lump sum payment select type 021.</td></tr>
<tr><td>5. Enter the Effective Date.
(The date that the work begins)</td><td>
</td></tr>
<tr><td>6. Enter the End Date.
(The date that the work ends)</td><td>
</td></tr>
<tr><td colspan="2">Action 5 & 6 Notes:
Effective dates should reflect when work will actually be done. End date should never be prior to when work was completed. A pop-up window similar to the one shown below will trigger after end date is keyed. Click OK.

</td></tr>
<tr><td>7. Update the Total Comp.</td><td>
</td></tr>
<tr><td colspan="2">Action 7 Notes:
A pop-up window similar to the one shown below may trigger after Total Comp is keyed. Click OK.

</td></tr>
</table>

<table>
<tr><th>Action</th><th>Information</th></tr>
<tr><td>8. Key the appointment FTE or click the magnifying glass next to the FTE field to open a table with pay decimal equivalents. Only valid values (according to PIMS) are accepted.</td><td>

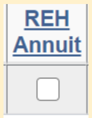
FTE should reflect, as accuratley as possible, the work effort. For example, 10 hours of work per week is a time base of 0.25 (10/40 = 0.25)</td></tr>
<tr><td colspan="2">Action 8 Notes:

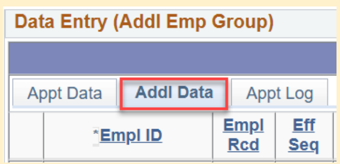
FTE affects the WTU value. Once the FTE is added or updated a pop-up window similar to the one shown below may trigger. If so than adjustments to the FTE or effective dates will be required. Click OK and then make the required adjustments. For suggestions on how to approach these adjustments refer to Adjusting FTE & Effective Dates. If a pop-up does not trigger move to next action.

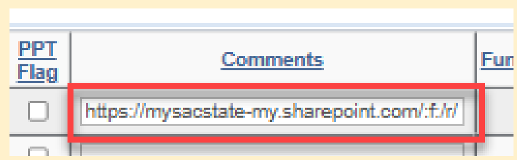

</td></tr>
<tr><td>9. <u>Optional</u>: Enter an Assign Title (assignment title). Do not use the Project field.</td><td>
</td></tr>
<tr><td colspan="2">Action 9 Notes:

Caution: Anything keyed into the Assign Title field will print on the employee's Notification letter. This field has a 14-character limit. A possible use for this field, which is optional, is the Additional Employment FLC workshop or project title. Do not use the Project field.</td></tr>
<tr><td>10. Review the Act Pay columns from January to December and the Sum Payment column.</td><td>
</td></tr>
<tr><td colspan="2">Action 10 Notes:

Act Pay (Actual Pay) for each month is calculated from the base rate, FTE and the number of pay days in each month that the assignment encompasses. This amount is the gross payment amount and does not include tax and benefits deductions. Sum Payment is the overall gross payment amount. This amount may be a few cents higher than the intended payment due to how TAE calculates Act Pay.</td></tr>
</table>

<table>
<tr><th>Action</th><th>Information</th></tr>
<tr><td>11. <u>Optional</u>: Select REH Annuit if the employee is a rehired annuitant.</td><td>
</td></tr>
<tr><td colspan="2">Action 11 Notes:

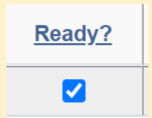
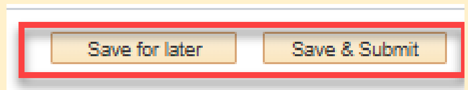
If checking REH Annuit box stop and email Faculty Affairs before offering a Rehired Annuitant faculty member an Additional Employment appointment. Rehired Annuitant faculty have additional workload restrictions. Faculty Affairs will need to review faculty for eligibility.</td></tr>
<tr><td>12. <u>Restricted</u>. Do not check the Diff Appt. box</td><td>
</td></tr>
<tr><td>13. Add a link to the additional employment support materials in the Comments field, located on the “Addl Data” tab of the data entry screen.</td><td>


</td></tr>
<tr><td colspan="2">Action 13 Notes:

Support materials should be saved in a shared OneDrive file. A file should be created for each unique appointment and faculty member. A link to this folder should be added to the Comments section, which can be found on the “Addl Data” tab of the data entry screen. Support materials must include the following:

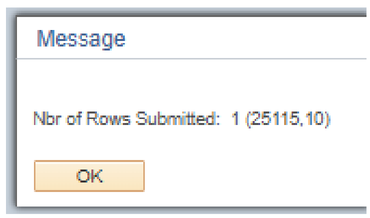
Who – The name of the faculty receiving the additional employment appointment. Should not include the names of other faculty.
What – What are they doing? A list of job duties and project information.
When – When is this work being done, i.e the timeline for the project from start to finish.
How much & often – How much should the faculty member be paid. Is it a one-time payment or ongoing payment?
Confirmation of completion –Confirmation that the work was completed. Should be from a Chair, Dean, or project Facilitator. Confirmation of completion can be added to the file once work is complete, while the other materials should be added before keying the appointment in TAE.

A common format for support materials is a memo containing all required information signed by the Chair, Dean, or project Facilitator.</td></tr>
</table>

Action	Information
14. Select **Ready** if the entire row is correct and ready for processing.	
15. Click **Save & Submit** or **Save for Later**	

Action 15 Notes:

If you click **Save & Submit** rows that you have correctly completed and marked Ready will be submitted for approval. A pop-up box will appear informing you of the total number of rows that were successfully submitted. It will also include any errors you may need to correct for those that did not. You will need to correct these errors before attempting to resubmit. Fields with errors will be highlighted in red.



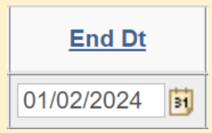
If you click **Save for Later** you can return to complete or update rows at a future date. Rows will not be submitted for approval until you **Save & Submit**.

Adjusting FTE & Effective Dates

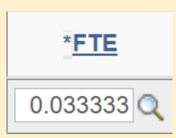
To adjust FTE or timeline (effective dates) and bring the 2403 Base Rate within range you can use the following actions.

Whenever possible FTE and timeline should be a true reflection of the work being completed.

<table>
<tr><th>Action</th><th>Information</th></tr>
<tr><td>1. Adjust Timeline:
Consider adjusting the timeline (effective dates) before adjusting the FTE in most scenarios.</td><td>


</td></tr>
<tr><td colspan="2">Action 1 Notes:

First adjust the EffDt (start date) while leaving the End Dt alone.
Reducing the timeline will increase the 2403 Base Rate.
Increasing the timeline will reduce the 2403 Base Rate.
Second, if trying to reduce the 2403 Base Rate and you are unable to move the EffDt any further (because the faculty member has other appointments or it would overlap with a leave of absense or other affecting date) adjust the End Dt. Note that End Dt can be later/after the date work is being completed, but it can not be prior/earlier. For example, if work was completed on 01/02 moving then End Dt from 01/02 to 01/06 would be acceptable, but moving the End Dt from 01/02 to 01/01 would not.

<u>Note</u>: If changing the timeline before an additional employment assignment has begun these changes should typically be reflected in the dates the faculty member actually works.</td></tr>
<tr><td>2. Adjust FTE:
In most scenarios consider adjusting FTE after attempting to adjust the timeline.</td><td>
</td></tr>
<tr><td colspan="2">Action 2 Notes:

FTE is a reflection of overall workload. It can be viewed in terms of WTU or hours per week with 15 WTU or 40 hours per week being a full time workload or 1.00 time base. To calculate FTE you would divide the units of measure by a full time load. For example, 8 hours per week would be 8/40 = 0.20 FTE. And 3 WTU would be 3/15 = 0.20 FTE.
Reducing the WTU or hours per week will increase the 2403 Base Rate.
Increasing the WTU or hours per week will reduce the 2403 Base Rate.
A combination of changes to the timeline and FTE can be used to ensure that the 2403 Base Rate is within range before submitting the appointment for review and approval.

<u>Note</u>: If changing workload before an additional employment assignment has begun this should typically be reflected in the faculty members actual workload.</td></tr>
</table>

Entering Additional Employment (Lump Sum) – Quick Sheet

Action	Information
1. Navigate to CSU TAE Appointment Data Entry	Menu > CSU Temp Academic Employment > CSU TAE Appointment Data Entry.
3. Enter search criteria for the employees that you want to retrieve via EE Group 08 and Dept ID and/or Empl ID.	Search Criteria Business Unit: SACST CSU SACRAMENTO; *EE Group: 08 Additional Employment; Empl ID: 100079537 Mickey Mouse; Dept ID: ….
3. Click Search.	Search
4. Review the results	If the faculty whose appointment you are attempting to key does not appear in the search results, or they do and you need to use a different Dept ID, Job Code (2403 or 2359) or the effective dates of the new appointment overlap with a current appointment add a new row by clicking “Add new Person”. Otherwise use the returned row to key the new appointment. Click - Add new Person and use *Empl ID NEW to add a new row.
5. Add or update the **Position Nbr** field, if appropriate.	*Position Nbr 10006468
6. Verify the **Job Code**.	Job Code 2403
7. Verify and update the **Grade**, if appropriate.	*Grade 0 If the Job Code is 2403 the Grade will always be 0, if the Job Code is 2359 the Grade must match the Grade of their primary position.
8. Click the magnifying glass next to the Appt Type field and select **Appt Type 021**	*Appt Type 021
9. Enter the **Effective Date**.	EffDt 08/17/2023

10. Enter the **End Date**.	End Dt 01/02/2024
11. Update the **Total Comp**.	Total Comp 1,200.00
12. Key the appointment **FTE** or click the magnifying glass next to the FTE field to open a table with pay decimal equivalents. Only valid values (according to PIMS) are accepted.	*FTE 0.033333
13. **Optional**: Enter an assignment title.	Assign Title Anything keyed into the Assign Title field will print on the employee's Nofication letter. This field has a 14 character limit. A possible use for this field, which is optional, is the Additional Employment project title.
14. Review the **Act Pay** columns from January to December and the **Sum Payment** column.	January Act Pay: ; February Act Pay: ; March Act Pay: 256.80; April Act Pay: 1,968.87; May Act Pay: 1,968.87; June Act Pay: 805.44; December Act Pay: Sum Payment 5,000.00
15. **Optional**: Select REH Annuit if the employee is a rehired annuitant.	REH Annuit If checking REH Annuit box stop and email Faculty Affairs before offering a Rehired Annuitant faculty member an Additional Employment appointment. Rehired Annuitant faculty have additional workload restrictions.
16. **Add a link** to the additional employment support materials to the Comments field.	215 | PPT Flag | Comments | Funding / Dist Pct% | Ready? https://mysacstate-my.sharepoint.com/:f:/r/
17. Select **Ready** if the entire row is correct and ready for processing.	Ready?
18. Click **Save & Submit** or **Save for Later**	Save for later | Save & Submit

Additional Employment Appointment - Editing guidelines

Use these guidelines when you enter Additional Employment data within 08 EE group.

If you need to…	Do this…	Result
Enter an appointment for an employee who is in search results if the following is true; the Dept ID and Job Code (2403 or 2359) are not changing and the effective dates for the new appointment do not overlap with a current appointment.	• After finding the individual within your department, edit the existing row for that employee via Enter appointment data.	• Approval workflow begins • If approved, appointment notification sent • Appointment entered into Job Data
Enter an appointment for an employee who is not in the search results by adding a new row if the following is true; The Dept ID or the Job Code (2403 or 2359) are changing, or effective dates for the new appointment overlap with a current appointment.	• Optional: Add new Person • Edit the new row for that employee	• Approval workflow begins • If approved, appointment notification sent • Appointment entered into Job Data
Revise an existing appointment. Example: • Increase or decrease compensation amount • Change end date of appointment • Update faculty workload for project	• Enter the Appt Type and EffDt to retrieve an existing row • Edit the existing row for that employee • Click Yes to disregard the warning that the term already exists in the history table • Other Action field defaults to **Revision**	• Approval workflow begins • If approved, appointment notification sent • If revisions approved, a new REVISED appointment notification is generated • Appointment entered into Job Data
• Cancel an existing appointment after it is loaded to Job Data	• Contact OFA if you need to cancel an appointment.	• Approval workflow begins • If approved, appointment notification sent • If cancellation approved, Cancelation notification is generated. • Job is canceled in Job Data.

Appendix: Other Actions relevant to Additional Employment appointments.

This appendix explains the Other Actions menu choices relevant to Additional Employment (EE Group 08)

Action	What it does
Canceled	• Used to cancel an appointment either in the middle of the approval process or after the transaction has been loaded to job. • This action sends a notification to the employee and adds a canceled row to job data. • Contact OFA if you need to cancel an appointment.
Revision	• Used to update an appointment either in the middle of the approval process or after the transaction has been loaded to Job Data. • This action sends a notification to the employee. • Adds a DTA/CNR to Job Data.

Additional Employment (AE) Appointment – TAE Submission workflow