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 by Empl ID
- Search for Employees by Dept ID
- Check Employee Work History
- Optional: Add New Person
- Entering Additional Employment (Lump Sum)
- Additional Employment Appointment - Editing guidelines
- Appendix: Other Actions Relevant to Additional Employment Appointments
- Additional Employment (AE) Appointment – TAE Submission Workflow

Before you begin you will need to:

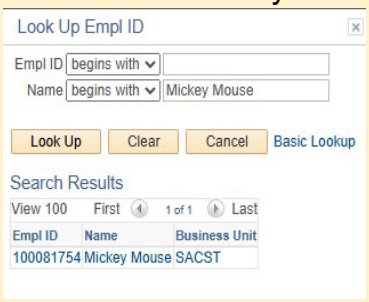
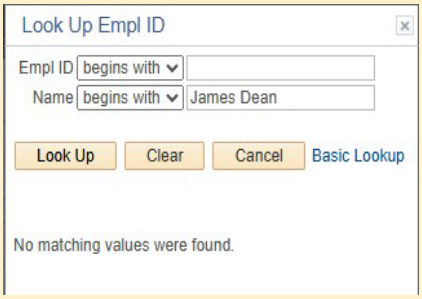
Know their employment status: Full-time, Part-time, Rehired Annuitant (verify workload limitations), or FERP (ineligible).
Know the position number (available options for your department will be listed)
Know the payment amount
Know Effective Start and End Date
Know the workload (WTU or hours per week)

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 by Empl ID

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

Action	Information
2. Enter search criteria for the employees you want to retrieve. - Business Unit (campus) - EE Group: **08 Additional Employment** - Empl ID - Lookback Dt	 • Verify that the Business Unit is correct (SMCMP) • EE group is required, enter 08. • Key the Empl ID or click the magnifying glass next to the Empl ID field to search by name or ID.   • Lookback Date: This field is set by default to look back 18 months.

Action 2 Notes:

If you are unable to locate a faculty member via the “Look Up Empl ID” feature by name or by ID it is likely that the faculty member has not completed additional employment work for any Department for which you have CHRS security access. Skip to “Add new Person” or adjust the lookback date and search again.

If you are able to locate the faculty member via the “Look Up Empl ID” feature than select that faculty member by clicking their name or Empl ID in the search results.

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

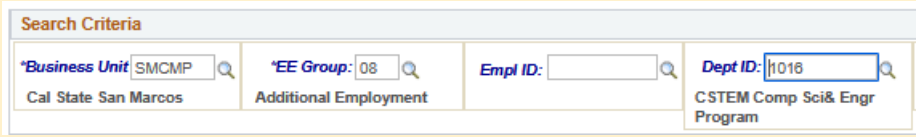
4. Review the results	Does your search return a row for the faculty you want to key? • If not then you will add a new row via "Add new Person". • If a data row is returned for the faculty you want to key you will need to review that row to determine if you will need to add a new row via "Add new Person" or use the returned row to enter the new appointment data.

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.

Search for employees by Dept ID

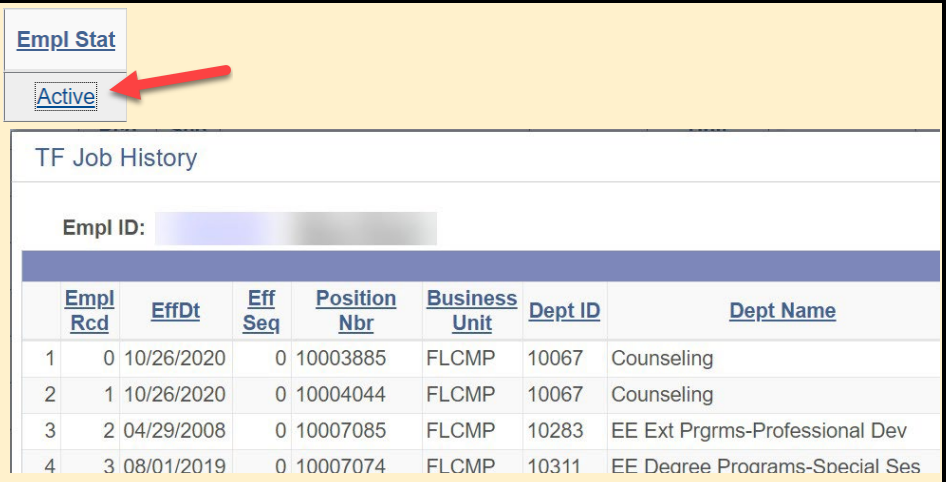
Action	Information
1. Navigate to CSU TAE Appointment Data Entry	Menu > CSU Temp Academic Employment > CSU TAE Appointment Data Entry.
2. Enter search criteria for the employees that you want to retrieve. - Business Unit (campus) - EE Group: **08 Additional Employment** - Dept ID - Lookback Dt	 • Verify that the Business Unit is correct • EE group is required, enter 08. • Key the Dept ID for the fund source connected to the Additional Employment payment. • Lookback Dt.: You can edit this date.
Action 2 Notes: 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. As long as you have CHRS security access for the Dept ID searched.	
3. Click **Search**.	 Employees are retrieved from Job Data. If an employee has worked multiple consecutive jobs, the most recent job is retrieved.
4. Review the results	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.

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- 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.

Check Employee Work History

Action	Information
1. **Optional**: Under the **Empl Stat** column you may click the status (Active, Terminated…) value for an employee to view an employee's work history.	

	Empl Rcd	EffDt	Eff Seq	Position Nbr	Business Unit	Dept ID	Dept Name
1	0	10/26/2020	0	10003885	FLCMP	10067	Counseling
2	1	10/26/2020	0	10004044	FLCMP	10067	Counseling
3	2	04/29/2008	0	10007085	FLCMP	10283	EE Ext Prgrms-Professional Dev
4	3	08/01/2019	0	10007074	FLCMP	10311	EE Degree Programs-Special Ses

Action 1 Notes:

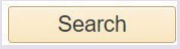
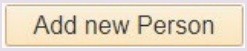
Workload is listed as WTU and FTE in Job History and can be used to determine if the faculty member has the workload capacity to accept additional employment.

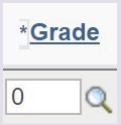
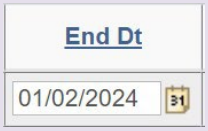
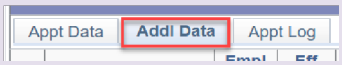
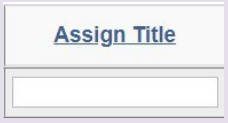
Optional: Add New Person

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.

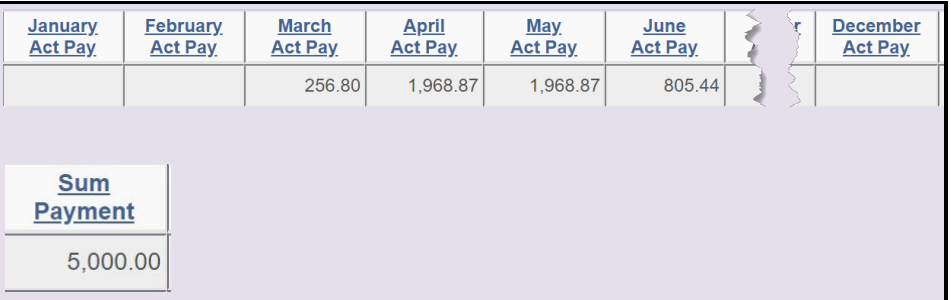
Action	Information
1. Click **Add new Person**.	 A new row is added to the page.
2. Click the magnifying glass next to **Empl ID** field to search for Empl ID by name.	 Continue to Enter appointment data once a new row has been added.
Action 2 Notes: The TAE Empl ID will be different from a faculty's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

Entering Additional Employment (Lump Sum)

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.	 If you are unable to locate a faculty member via the “Look Up Empl ID” feature by name or by ID the faculty member skip to action 4 and “Add new Person”
3. Click 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 -  and use  to add a new row.
5. Add or update the **Position Nbr** field, if appropriate.	
6. Verify the **Job Code**.	

7. Verify and update the **Grade**, if appropriate.	 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**	
9. Enter the **Effective Date**.	
10. Enter the **End Date**.	 You will also need to add the appointment **End Dt** to the "Pay End Dt" field, located on the Addl. Data tab. 
11. Update the **Total Comp**.	
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.	
13.Enter an assignment title.	 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 project title.

14. Review the **Act Pay** columns from January to December and the **Sum Payment** column.

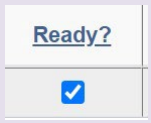


15. Select REH Annuit if the employee is a rehired annuitant.



If checking REH Annuit box stop and email Faculty Affairs facultyaffairs@csusm.edu before offering a Rehired Annuitant faculty member an Additional Employment appointment. Rehired Annuitant faculty have additional workload restrictions.

16. Select **Ready** if the entire row is correct and ready for processing.



17. Click **Save & Submit** or **Save for Later**



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 Faculty Affairs facultyaffairs@csusm.edu 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 Faculty Affairs facultyaffairs@csusm.edu 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.

TAE Submission workflow - Additional Employment

