

## 14. Action-Reason Reference Guide

### 14.1. About this Guide

This reference guide is intended to guide you when performing data changes using action-reason combinations in E-TRAC.

This guide is categorized by E-TRAC Modules **Hire**, **Employee Change**, and **Change Vacant Position**. Under these first level categories you will find the sub-categories of action-reason combinations.

#### 14.1.1. How to read the tables

Below is a description of the information found in the action-reason combinations.

Action Description	Type of Action
Reason Description	Reason for the Action
<b>E-TRAC Notes</b>	To be included in <b>Notes</b> section of E-TRAC pages. Substitute information in brackets with specific information.
<b>Required Forms</b>	The forms required in addition to the E-TRAC transaction.
<b>Process Outside of E-TRAC</b>	Steps you must follow outside of the E-TRAC process.
<b>HRF Translation</b>	Equivalent of action-reason combination in the 107 form.
<b>Guidelines</b>	Includes guidelines or refers to guidelines outside of this guide.

#### 14.1.2. Inventory of Action-Reason Combinations

##### 14.1.2.1. Employee Change

Action	Reason
<b>Data Change</b>	Correction
	Extend Appointment
	Extend NDI
	Extend/Change Leave of Absence
	Immediate Pay
	New Temporary Appointment
	On NDI-Partial Return from Work
	Temporary Assignment to Permanent Assignment
<b>Demotion</b>	Temporary to Probationary/Permanent Appointment
	Disciplinary Action
<b>Earnings Distribution Change</b>	Voluntary
	Fund Source Change

<b>Job Reclassification</b>	In-Class Progression
	Job Code Change
<b>Leave of Absence</b>	FMLA/CFRA
	Medical
	Military Service
	Personal
	Professional
<b>Pay Rate Change</b>	Equity Adjustment
	In Range Progression
	Market Adjustment
	Merit (All Bargaining Units)
	Partial Leave - Family Medical
	Partial Leave - Personal
	Partial Leave - Professional
	Return from Partial Leave
	Student Pay Rate Change
	Time Base Change
<b>Promotion</b>	Promotion
<b>Retirement</b>	Disability
	Service
<b>Return from Disability</b>	Ret from IDL – Off Pay Status
	Ret from IDL/TD – On Pay Status
	Ret from NDI – Full Return
	Ret from TD – Off Pay Status
<b>Return from Work Break</b>	Pending Approval
	Return from Short Work Break
<b>Return from Leave</b>	Return from Paid LOA
	Return from Unpaid LOA
<b>Short Term Disability with Pay</b>	Conversion
	IDL
	IDL Enhanced
	IDL with Supplement
	NDI, Catastrophic Leave
	NDI, No Supplementation
	New NDI period, Catastrophic Leave
	New NDI period, No Supplementation
	Temp disability with Supplement
	Temporary Disability
<b>Short Work Break</b>	Off Pay Status
	Pending Legal Action

	Pending NDL/IDL/TD/Disb Retirement
<b>Suspension</b>	Suspension
<b>Termination</b>	Auto-resignation/AWOL
	Cancelled Appointment
	Death
	Dismissal
	End Temporary Appointment
	Rejected During Probation/Non-Retention
	Resignation
	Resignation-Better Job
	Resignation-Better Pay
	Resignation-Dissatisfied
	Resignation-Personal Reasons
<b>Transfer</b>	In Lieu – Recall Rights Waived
	Involuntary Reassignments
	Medical Reasons
	Pay Plan change with Fin Settlement
	Pay Plan Change without Fin Settlement
	Reinstatement – Prob Rejected
	Reinstatement – Temp Assignment
	Voluntary Reassignment

#### 14.1.2.2. Employee Hire

There are four types of Hire-Appointment combinations, Hire-Appt Former Employee Prior PS combinations, and Hire-Concurrent Job combinations. Refer to the row **E-TRAC Notes** for specific information about these action-reason combinations.

Action	Reason
Hire	Appointment
	Appointment of Former Employee prior to PeopleSoft implementation
	Concurrent Job
Rehire	Mandatory Reinstatement
	Rehire

#### 14.2. Employee Change (ECH)

<b>Action Description</b>	Data Change
<b>Reason Description</b>	Correction
<b>Required Forms</b>	The forms required depend on the type of correction.
<b>Process Outside of E-TRAC</b>	Contact your HR Services Representative prior to completing a correction in E-TRAC.
<b>E-TRAC Notes</b>	Correction is requested because [identify item to correct].

<b>Guidelines</b>	
<b>Action Description</b>	Data Change
<b>Reason Description</b>	Extend/Change Leave of Absence
<b>Required Forms</b>	
<b>Process Outside of E-TRAC</b>	Employee needs complete a Request for Leave of Absence without Pay form. The form needs to be signed by department chair, college dean, dean of faculty affairs, and vice president.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	For leaves without pay only

<b>Action Description</b>	Data Change
<b>Reason Description</b>	New Temporary Appointment or Reappointment (SFSU only)
<b>Required Forms</b>	If first appointment for academic year: FAO 112. If returning for Spring semester: None
<b>Process Outside of E-TRAC</b>	Department or college must send FAO 112 and faculty reviews (if any) to HR.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	

<b>Action Description</b>	Data Change
<b>Reason Description</b>	On NDI-Partial Return to Work
<b>HRF Transaction Type</b>	
<b>Process Outside of E-TRAC</b>	Employee must be on Leave - NDI; Contact HR Services Representative/Benefits/Leave Coordinator to identify effective date and eligibility to return to work.
<b>E-TRAC Notes</b>	Employee or HR Representative (name) requested ETRAC; Certification was handed to the Benefits/Leave Coordinator and/or Payroll Leave Coordinator (name) identified effective dates and time base (FTE).
<b>Guidelines</b>	Refer to Leave of Absence Guidelines.

<b>Action Description</b>	Data Change
<b>Reason Description</b>	Temporary Assignment to Permanent Assignment
<b>Required Forms</b>	
<b>Process Outside of E-TRAC</b>	
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	

<b>Action Description</b>	Leave of Absence
<b>Reason Description</b>	FMLA/CFRA
<b>Required Forms</b>	Leave of Absence Form; Medical Certification unless Maternity Leave; Attendance Form #634.

<b>Process Outside of E-TRAC</b>	Leave of Absence request must be approve by HR prior to completing an ETRAC request. HR Benefits/Leave Specialist (Soledad Espitia) will identify effective date. Duration does not exceed one year.
<b>E-TRAC Notes</b>	HR Benefits/Leave Specialist (Soledad Espitia) will identify effective date. Duration does not exceed one year.
<b>Guidelines</b>	Leave of Absence Guidelines.

<b>Action Description</b>	Leave of Absence
<b>Reason Description</b>	Medical
<b>Required Forms</b>	Leave of Absence Form; Medical Certification unless Maternity Leave; Attendance Form #634.
<b>Process Outside of E-TRAC</b>	Leave of Absence request must be approve by HR prior to completing an ETRAC request. .HR Benefits/Leave Specialist (Soledad Espitia) will identify effective date. Duration does not exceed one year.
<b>E-TRAC Notes</b>	HR Benefits/Leave Specialist (Soledad Espitia) will identify effective date. Duration does not exceed one year.
<b>Guidelines</b>	Leave of Absence Guidelines.

<b>Action Description</b>	Leave of Absence
<b>Reason Description</b>	Military Service
<b>Required Forms</b>	Original Military Leave documentation; Attendance Form #634.
<b>Process Outside of E-TRAC</b>	Leave of Absence request must be approve by HR prior to completing an E-TRAC request. HR Services Representative/Benefits/Leave Specialist (name) identified effective date. Duration does not exceed one year.
<b>E-TRAC Notes</b>	HR Services Representative/Benefits/Leave Specialist (name) identified effective date. Duration does not exceed one year.
<b>Guidelines</b>	Leave of Absence Guidelines

<b>Action Description</b>	Leave of Absence
<b>Reason Description</b>	Personal
<b>Required Forms</b>	
<b>Process Outside of E-TRAC</b>	Employee needs complete a Request for Leave of Absence without Pay form. The form needs to be signed by department chair, college dean, dean of faculty affairs, and vice president.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	For leaves without pay only (full leave of absence).

<b>Action Description</b>	Leave of Absence
<b>Reason Description</b>	Professional
<b>Required Forms</b>	
<b>Process Outside of E-TRAC</b>	Employee needs complete a Request for Leave of Absence without Pay form. The form needs to be signed by department chair, college dean, dean of faculty affairs, and vice president.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	For leaves without pay only (full leave of absence).

<b>Action Description</b>	Pay Rate Change
<b>Reason Description</b>	Partial Leave - Family Medical
<b>Required Forms</b>	
<b>Process Outside of E-TRAC</b>	Employee needs complete a Request for Leave of Absence without Pay form. The form needs to be signed by department chair, college dean, dean of faculty affairs, and vice president (for Faculty) or signed by Supervisor, Dean/Director and AVP of Human Resources, Safety & Risk Management (Staff).
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	For leaves without pay only (full leave of absence).

<b>Action Description</b>	Pay Rate Change
<b>Reason Description</b>	Partial Leave - Personal
<b>Required Forms</b>	
<b>Process Outside of E-TRAC</b>	Employee needs complete a Request for Leave of Absence without Pay form. The form needs to be signed by department chair, college dean, dean of faculty affairs, and vice president.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	For leaves without pay only (full leave of absence).

<b>Action Description</b>	Pay Rate Change
<b>Reason Description</b>	Partial Leave - Professional
<b>Required Forms</b>	
<b>Process Outside of E-TRAC</b>	Employee needs complete a Request for Leave of Absence without Pay form. The form needs to be signed by department chair, college dean, dean of faculty affairs, and vice president.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	For leaves without pay only (full leave of absence).

<b>Action Description</b>	Pay Rate Change
<b>Reason Description</b>	Return from Partial Leave
<b>Required Forms</b>	SAME AS STAFF OR FULL LEAVE.
<b>Process Outside of E-TRAC</b>	Leave of Absence request must be approve by HR prior to completing an ETRAC request. HR Services Representative/Benefits/Leave Specialist (name) identified effective date. Duration does not exceed one year.
<b>E-TRAC Notes</b>	Employee or HR notifies to complete ETRAC; Supervisor (name) or Leave Coordinator (name) may identify effective dates and time base (FTE).
<b>Guidelines</b>	Refer to Leave of Absence Guidelines.

<b>Action Description</b>	Pay Rate Change
<b>Reason Description</b>	Time Base Change
<b>Required Forms</b>	Work schedule Form and Position Description may need to be updated.

<b>Process Outside of E-TRAC</b>	Employee must formally request and be approved to change their time base; Employee must meet with Retirement Specialist regarding eligibility - OR - Due to operational need, an employee's FTE is increased and a current position description reflects a need.
<b>E-TRAC Notes</b>	Time base changed was approved by HR Services Representative (name). The actual salary rate is \$ .
<b>Guidelines</b>	Refer to Collective Bargaining Agreement Article and Permanent Status for Less than Full-Time Employees Procedure.

<b>Action Description</b>	Promotion
<b>Reason Description</b>	Promotion
<b>Required Forms</b>	Employee may update Sign-In Forms: Biographical #002 form, Application form, I-9 Form/Certification, Designee to Receive Warrant #243 Form, EAR (Employee Action Request) #686 Form, Benefits Orientation Guide, Confidentiality Access and Compliance Form. Employee Benefits Eligibility may change; therefore other Benefits Forms, Life Insurance.
<b>Process Outside of E-TRAC</b>	Follow Recruitment Guidelines: draft a position description and identify Job Code; after the Job Code is identified: complete recruitment packet, post position, interview, recommend to hire, complete Recommendation Form #171 and return applications/resume to HR; HR, Services will contact you to complete ETRAC.
<b>E-TRAC Notes</b>	Employee accepted Job # . Employee's documentation is complete or Employee is scheduled to meet with (name).
<b>Guidelines</b>	Refer to Recruitment Guidelines and Compensation Guidelines.

<b>Action Description</b>	Retirement
<b>Reason Description</b>	Disability
<b>Required Forms</b>	Retirement Form, Attendance Form #634 and CALPERS form/documentation.
<b>Process Outside of E-TRAC</b>	Employee must complete all Retirement forms/documentation with SFSU Retirement Specialist; Approval Letter is received from CALPERS.
<b>E-TRAC Notes</b>	Retirement Specialist (name) identified effective date.
<b>Guidelines</b>	Refer to Collective Bargaining Agreement Article and CALPERS Guidelines.

<b>Action Description</b>	Retirement
<b>Reason Description</b>	Service
<b>Required Forms</b>	Retirement Form, Attendance Form #634 and CALPERS form/documentation.
<b>Process Outside of E-TRAC</b>	Employee must complete all Retirement forms/documentation with SFSU Retirement Specialist; Approval Letter is received from CALPERS.
<b>E-TRAC Notes</b>	Retirement Specialist (name) identified effective date.
<b>Guidelines</b>	Refer to CALPERS Guidelines.

<b>Action Description</b>	Return from Leave
<b>Reason Description</b>	Return from Paid LOA
<b>Required Forms</b>	No forms required.

<b>Process Outside E-TRAC</b>	Department/College runs report for faculty member who are on leave status. Return or extend leave as appropriate.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	

<b>Action Description</b>	Return from Leave
<b>Reason Description</b>	Return from Unpaid LOA
<b>Required Forms</b>	No forms required.
<b>Process Outside E-TRAC</b>	Department/College runs report for faculty member who are on leave status. Return or extend leave as appropriate.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	

<b>Action Description</b>	Termination
<b>Reason Description</b>	Auto Resignation/AWOL
<b>Required Forms</b>	Dean/Administrator Memo, Performance Evaluations and all employee notification.
<b>Process Outside of E-TRAC</b>	Employee must complete Attendance Form #634 and schedule a Clearance appointment.
<b>E-TRAC Notes</b>	Employee Relations Director/Designee identified effective date.
<b>Guidelines</b>	Refer to Performance Management Guidelines, Progressive Discipline Guidelines, Leave of Absence Guidelines.

<b>Action Description</b>	Termination
<b>Reason Description</b>	Cancelled Appointment
<b>Required Forms</b>	Cancelled reason is used for faculty appointments; Employee never worked.
<b>Process Outside of E-TRAC</b>	
<b>E-TRAC Notes</b>	Employee did not work.
<b>Guidelines</b>	

<b>Action Description</b>	Termination
<b>Reason Description</b>	Death
<b>Required Forms</b>	Death Certificate
<b>Process Outside of E-TRAC</b>	Employee's family notifies administrator and/or Human Resources Services Representative; HR will assist to complete all needed forms.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	Contact HR, Services Representative/ Retirement Specialist

<b>Action Description</b>	Termination
<b>Reason Description</b>	End Temporary Appointment
<b>Required Forms</b>	



<b>Process Outside of E-TRAC</b>	Employee must also complete Attendance Form #634 and schedule a Clearance appointment.
<b>E-TRAC Notes</b>	Employee's appointment is ending/not being reappointed.
<b>Guidelines</b>	Refer to Clearance Guidelines

<b>Action Description</b>	Termination
<b>Reason Description</b>	Rejected During Prob/NonRetentn
<b>Required Forms</b>	Copy of Presidential Letter for non-retention.
<b>Process Outside of E-TRAC</b>	Reference on-line procedures.
<b>E-TRAC Notes</b>	
<b>Guidelines</b>	

<b>Action Description</b>	Termination
<b>Reason Description</b>	Resignation
<b>Required Forms</b>	Original Employee resignation letter/memo
<b>Process Outside of E-TRAC</b>	Employee must compose a resignation memo/letter, complete Attendance Form #634 and schedule a Clearance appointment.
<b>E-TRAC Notes</b>	Employee is scheduled for a Clearance Procedure; Hand Delivered resignation letter/memo to HR, Representative (name)
<b>Guidelines</b>	Refer to Clearance Guidelines.