

## 4. Requesting Student Employee Changes

This chapter describes the procedures for performing student employee changes in E-TRAC.

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### 4.1. Steps Outside of E-TRAC

These steps are organized by job code.

#### 4.1.1. 1870 Student Assistant, 1874 Student Assistant Bridge, 1868 Student Non-Resident Alien, 1150 Instructional Student Assistant

**Note:** 1150 needs an appointment letter for any change and departments may have requirements

- 1 Creator Submits an E-TRAC Employee Change request.

#### 4.1.2. 1871 On Campus Work Study, and 1872 Off Campus Work Study (Regular Work Study), 1151 Instructional Work Study

**Note:** 1151 needs an appointment letter for any change and departments may have requirements

- 1 Student receives work study clearance form from Office of Student Financial Aid (OSFA).
- 2 Student submits work study clearance form to Department Supervisor to identify pay rate change.
- 3 Department supervisor and E-TRAC coordinator requests E-TRAC Employee Change request

#### 4.1.3. 1875 On-campus Work Study Bridge, 1876 Off-Campus Work Study Bridge

- 1 Student receives workstudy clearance form from the Office of Student Financial Aid (OSFA).

- 2 Student submits workstudy clearance form to Department Supervisor to identify pay rate change.
- 3 Department supervisor and E-TRAC coordinator requests E-TRAC Employee Change request.

## 4.2. Student Employee Changes

- 1 Navigate to E-TRAC Home page.
- 2 Select **Employee Change** and click **Add**.
- 3 Click **Add a New Value**.

The Employee Change Request page appears.

## 4.3. Employee Change Request Page

Initially, the Employee Change Request page contains only two sections: Employee Change Information and Notes.

More sections appear depending on the action-reason combination that you choose. However there are only four action-reason combinations for Student Employees:

Action	Reason
Pay Rate Change	Student Pay Rate Change
Data Change (Extend Expiration Date)	New Temp Appointment
Termination	End Temporary Appointment/resignation

Table 4-1 Available action-reason combinations for students

### 4.3.1. Employee Change Information

The Employee Change Information section is composed of the following fields:

- Effective Date
- Select Employees
- EmplID
- Empl Rcd Nbr (employee record number)

## Employee Change Request Page

E-TRAC ID: NEW [E-TRAC Home Page](#)

Please enter as much information about the employee change you are requesting. Fields with an asterisk (\*) next to them are required, all others are optional.

### Employee Change Information

\*Effective Date:   [Select Employee](#)

EmpID:

Empl Rcd Nbr: 0

### Notes

Find    First  1 of 1  Last

User ID: AVPPR35                      Gomez,Xavier

Date/Time: 02/12/2007 11:14:27AM

Notes:

Figure 4-1 Employee Change Request Page

- 1 Enter the **Effective Date** for the Employee Change which is the first day that the change becomes effective. Pay rate will be the last rate entered for the month. If the student is paid more than one rate in a month, the student will need a second job. See Student Hires: same position number at different pay rate.
- 2 Click the link for **Select Employee** to search for the name of the employee whose information you will change. You will be able to enter several data elements or combinations of elements as search criteria. You do not have to enter data into all the search fields.

### Find an Employee

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EmpID:

First Name:

Last Name:

Deptid:  

Position:

Figure 4-2 Search criteria

- Once you enter your criteria a short list of matches will appear as a list. Select the appropriate employee from the list by clicking the highlighted link.

#### Find an Employee

EmplID:   
 First Name:   
 Last Name:   
 Deptid:    
 Position:

Search Results								
EmplID	Rcd#	Name	Status	Position	Job Code	Descr	DeptID	Dept Descr
<a href="#">900611353</a>	0	Patrick Wachira	Terminated	<a href="#">00005806</a>	1871	Stdnt Trnee,On-Cmps Wrk Stdy	3465	SOCIAL WORK EDUCATION
<a href="#">900611353</a>	1	Patrick Wachira	Active	<a href="#">00006164</a>	1870	Student Assistant	6047	CMS IMPLEMENTATION - DOIT

Figure 4-3 Search results based on search criteria

The employee's current job status and department is brought into the Employee Change Information section of the screen. You may see two or more lines for the employee in the search results. This means that the employee has multiple job assignments or concurrent jobs; each job will be differentiated by the Empl Rcd Nbr (employment record number). Take special care to select the correct Empl Rcd Nbr.

- From the Action field, click the drop down list to view the various types of Employee Change actions. In this example, the **Action** of **Pay Rate Change** is used.
- Choose **Student Pay Rate Change** from the **Reason** drop down menu.

Employee Change Information			
*Effective Date:	02/12/2007 	<a href="#">Select Employee</a>	E-TRAC 6047 Department:
EmplID:	900611353	Patrick Wachira	
Empl Rcd Nbr:	1	6047	CMS IMPLEMENTATION - DOIT
Pay Status:	Active	1870	Student Assistant
*Action:	Pay Rate Change 		<a href="#">Active Job Records</a>
*Reason:	Student Pay Rate Change 		

Figure 4-4 Employee Change information box with specific action-reason combination

The E-TRAC Employee Change module is dynamic, meaning that depending on the **action-reason combination** selected, the fields displayed and referenced required for entry, will vary.

Depending on the action you select, you may have to select a reason. Remember from above that a reason simply provides more detail about the action. In this example, we have selected **Pay Rate Change/Student Pay Rate Change**. Notice the additional fields that display.

The Reference Information data displays to aid the user during the completion of a particular type of Employee Change Request.

Reference Information	
Position Number:	00006164
Department:	6047
Job Code:	1870
Regular/Temporary:	Temporary
Full/Part Time:	Part-Time
FTE:	0.010000
Appointment End Date:	08/31/2007
SSI Counter:	

Figure 4-5 Reference Information section

The section Current Values also displays for reference next to the section Proposed Values which is available for you to update. However you may only change the **Comp Rate**.

Current Values	Proposed Values
SSI Counter:	<input type="text"/>
Salary Grade: 0	<input type="text"/>
Rate Code: CSUHRL	<input type="text"/>
Comp Rate: 12.00	<input type="text"/>
FLSA Status: Nonexempt	<input type="text"/>
	Comp Rate: 15.00

Figure 4-6 Current Values and Proposed Values section

- 6 Enter a New Comp Rate.
- 7 Click **Save Work**.
- 8 If you are ready to submit your request, click **OK** on the confirmation page, then click **Submit** when the submit button appears.

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**Note:** If a prior appointment has an end date that is before the effective date of a reappointment, you must process a termination E-TRAC and then process a new hire E-TRAC. If the end date of the existing appointment is not before the effective date of the reappointment, you may process a reappointment using the action-reason combination of **Data change/New Temporary Appointment**. Do not do pay rate change on expired appointment. Do a new temporary appointment and change pay rate.

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### 4.3.2. Termination

You may terminate a student employee within the Employee Change module.

- 1 Select **Employee Change** from the E-TRAC home page and click **Add**.
- 2 Enter the effective date.
- 3 Click Select Employee. Enter the EmplID.
- 4 When the student's profile appears in the Action drop down menu select **Termination**.
- 5 From the **Reason** drop down menu, select either **End Temporary Appointment** or **Resignation**.
- 6 Enter the Last Day Worked in the Proposed Values section.



Proposed Values	
FTE:	<input type="text"/>
*Last Date Worked:	<input type="text" value="03/01/2007"/> 
SSI Counter:	<input type="text"/>

Figure 4-7 The Proposed Values section must have the Last Date Worked Box filled in.

- 7 Click **Save Work**.
- 8 If you are ready to submit your request, click **OK** on the confirmation page, then click **Submit** when the submit button appears.

# Employee Change Request Page

E-TRAC ID: NEW

EmplID:900611353

[E-TRAC Home Page](#)

Please enter as much information about the employee change you are requesting. Fields with an asterisk (\*) next to them are required, all others are optional.

Employee Change Information		
*Effective Date:	02/12/2007	<a href="#">Select Employee</a>
EmplID:	90[REDACTED]3	Patrick Wachira
Empl Rcd Nbr:	1	6047 CMS IMPLEMENTATION - DOIT
Pay Status:	Active	1870 Student Assistant
*Action:	Termination	<a href="#">Active Job Records</a>
*Reason:	End Temporary Appointment	

Reference Information	
Position Number:	00006164
Department:	6047
Job Code:	1870
FTE:	0.010000
Appointment End Date:	08/31/2007
SSI Counter:	

Current Values	
FTE:	0.010000
Last Date Worked:	
SSI Counter:	
FLSA Status	Nonexempt

Proposed Values	
FTE:	<input type="text"/>
*Last Date Worked:	02/12/2007
SSI Counter:	<input type="text"/>

Notes	
User ID:	AVPPR35 Gomez,Xavier
Date/Time:	02/12/2007 11:14:27AM
Notes:	<input type="text"/>

[Save Work](#)

Figure 4-8 Employee change module with view of Termination-End Temporary Appointment combination. The Current Values and the Proposed Values sections remain the same for either action-reason combination

**Note:** You should only use **Termination** if the employee is separating from the department or the University permanently. All regular separations should go through the auto-term process. If break in service occurs for job codes 1874, 1875, 1876, 1868, 1150, or 1151 then a termination and new hire is needed.

If the student is no longer an employee, then the Department may separate the student at any time from E-TRAC. However, if the student remains an employee then the following steps should be performed.

Every semester, Human Resources, Payroll Manager communicates to the department that an E-TRAC Express Reappointment is necessary to reappoint each student employee.

Time keepers may request for a report from their payroll manager or payroll technician. The time keepers will decide to separate or reappoint the student.

### **4.3.3. Exception: Job Code 1150 and 1151**

Instructional Student Assistants (ISA) are assigned to job code 1150 and Instructional Work Study Students are assigned to job code 1151. If an ISA 1150 or 1151 will be working more than 20 hours a week or is taking 6 units or less (part time) during the semester, payroll needs to be notified. Since a separate Bridge position does not exist for these job codes you will need to submit an Employee Change request. The action-reason combination will be **Data Change/Correction**. In the notes section add a message to inform the payroll technician that the student will be working more than 20 hours and will have a Bridge status, for example, "Student's hours are increasing to more than 20 hours, need to go into a retirement plan

## **4.4. Position Number Changes for an Employee**

The function of the Employee Change transaction is to change the position number for an active temporary employee. Changing the position number for an active temporary employee means that an employee moves from their current position number to a different position number in the same department. The different position number is set up with different funding attributes than the previous position number. Accordingly, this transaction can only be used and successfully saved and submitted when:

- The four-digit department IDs for the old and new positions are the same
- The job codes for the old and new positions are the same
- The unit numbers for the old and new positions are the same
- The new position to which the employee is being moved is established and active (as vacant or pooled) and/or set up prior to processing
- You may not use this action-reason combination to:
  - Move an employee from one job code to a different job code
  - Move an employee from one department to a different department
  - Change the grade or salary
  - Change the time base
  - Split the funding of an appointment
  - Hire or re-appoint an employee
- Also note that the position change will apply to 100% of the employee's appointment. Split or multiple-funding source changes for a single appointment are processed by using the Labor Cost Distribution Change Request form found at <http://www.sfsu.edu/~budget/forms.html>. The approval routing will function the same as other employee change transactions, but will end and receive final approval at the Budget Office.

#### 4.4.1 Requesting a Position Change / Position Data Update

- 1 Navigate to the E-TRAC home page and select **Employee Change**.
- 2 Click the **Select Employee** link.
- 3 Enter the effective date and TAB to the next field. The effective date should be the first day of a pay period or, for academic-year appointments (AY lecturers, coaches, GTAs), the first academic work day of a semester.
- 4 Search for and select employee. You may use criteria such as name, Empl ID, etc.
- 5 Select **Position Change** from the Action drop down list.
- 6 Select **Position Data Update** from the Reason drop down list.

Employee Change Information			
*Effective Date:	02/16/2007 	<a href="#">Select Employee</a>	E-TRAC 6150 Department:
EmplID:	900011111	Xavier Gomez	
Empl Rcd Nbr:	0	6150	REGISTRAR'S OFFICE
Pay Status:	Active	1032	Admin Support Assistant 12 Mo
*Action:	Position Change 		<a href="#">Active Job Records</a>
*Reason:	Position Data Update 		

Figure 6-9 Appropriate action-reason combinations

- 7 In the proposed values box, enter the new position number or use the magnifying glass icon to search for and select the new position number.

Current Values	Proposed Values
Position Number: 00004289	*Position Number: <input type="text"/> 
FLSA Status Nonexempt	

Figure 6-10 Example of updated values

- 8 To search for a position number, use the look up search by DeptID, Description and Job Code.
- 9 Enter notes in the Notes box (optional).
- 10 Click the **Save Work** button and click **Submit** for approval, as appropriate.

## 4.5. Employee Change Field Definitions

The following field definitions are provided for your reference. Depending on the E-TRAC Action and Reason combination you select, any number of the following fields may display and/or be available for update.

Effective Date	Display Only	No
	Required	Yes
	Default	None
	SFSU Use	This field contains the date when the employee change becomes or became effective. This can be a historical, current or future date. The employee change will not be active or 'effective' until the beginning of this business day.
	Values	Note that in the case of a termination the effective date is the first day that the employee is terminated; i.e. the day after the last day worked.

Employee ID	Display Only	No
	Required	Yes
	Default	None
	SFSU Use	The employee ID is a number assigned by the system to an employee record. Unlike the employee ID previously used by SFSU, this number does not have any special meaning or relationship with social security number.
	Values	Reference table for values.

Empl Record Number	Display Only	No
	Required	Yes
	Default	Defaults to 0, but you may choose the appropriate Empl Rcd Num if the employee has multiple positions.
	SFSU Use	Employees in the system can have multiple job assignments. The Empl Record Number denotes each of these records. The employee's first Empl Record Number is 0 and the second would be 1.
	Values	Reference table for values.

Status	Display Only	Yes
	Required	Yes
	Default	Defaults based on the latest job action.
	SFSU Use	The status of the employee is determined by the system based on the latest job action. For example, a new hire has a status of Active and a student employee who had been previously terminated will have a status of Inactive.
	Values	Reference table for values.

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Action	Display Only	No
	Required	Yes
	Default	None
	SFSU Use	The action classifies the type of employee change. These represent general categories of personnel actions, the broadest of which is the Data Change.
	Values	Reference table for values.

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Reason	Display Only	No
	Required	Yes
	Default	None
	SFSU Use	The reason field provides further details about the action.
	Values	Reference table for values.

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Appointment End Date	Display Only	No
	Required	Yes
	Default	None
	SFSU Use	The date that a temporary appointment expires and is reflected as of the Close of Business, or the end of academic year assignments. Appointment End Date must denote the last date of the appointed month, semester or academic year, in accordance with the campus' academic calendar
	Values	Reference table for values.

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Comp Rate	Display Only	No
	Required	Yes
	Default	None
	SFSU Use	The Comp Rate reflects the actual salary that the employee will be paid based on the compensation rate noted above.
	Values	Reference table for values.

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Comp Rate Code	Display Only	No
	Required	Yes
	Default	This value defaults to CSUHRL.
	SFSU Use	The rate code field signifies whether the new hire is compensated as a salaried, hourly or immediate pay employee.
	Values	Reference table for values.

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Department	Display Only	No
	Required	Yes
	Default	The Department ID will default to the department of the E-TRAC user.
	SFSU Use	The Department ID is the basic component of the organization structure and security hierarchy. Users will only be able to create E-TRAC transactions for their own departments.
	Values	Reference table for values.

FTE	Display Only	No
	Required	Yes
	Default	Defaults to 0.01
	SFSU Use	This value is currently known to San Francisco State as time base. This field contains the calculated percentage of standard hours for the position and the standard work period. A position with an FTE of 1.0 (100% of the full-time equivalency) equals a full-time time base. FTE on the Employee Hire request does relate to an employee holding the position.
	Values	Reference table for values.

Full-Time/Part-Time	Display Only	No
	Required	Yes
	Default	Defaults to Full-Time. May default to Part-time depending on the position set-up. All student positions are part time.
	SFSU Use	This field indicates whether the position is full-time or part-time based on a standard 40 hour work week. The default is Full-Time; override if necessary. Therefore, if the position is less than 40 hours a week it should be identified as Part-Time position.
	Values	Reference table for values.

Min	Display Only	Yes
	Required	Yes
	Default	Defaults to the minimum salary amount for the Job Code/Range selected.
	SFSU Use	Defaults to the minimum salary amount for the Job Code/Range selected.
	Values	This field contains the minimum salary amount allowed for the position based on a combination of the Job Code/Range. If a new range is selected the screen will update with a new minimum value. This data displays in order to provide the user with the information necessary to determine the correct salary amount for this position.

Max	Display Only	Yes
	Required	Yes

Default	Defaults to the maximum salary amount for the Job Code/Range selected.
SFSU Use	Defaults to the maximum salary amount for the Job Code/Range selected.
Values	This field contains the minimum salary amount allowed for the position based on a combination of the Job Code/Range. If a new range is selected the screen will update with a new minimum value. This data displays in order to provide the user with the information necessary to determine the correct salary amount for this position.

Position Number	Display Only	No
	Required	Yes
	Default	None
	SFSU Use	The position number is a system generated code that identifies the position the employee will be filling. Unlike the current position number used at SFSU there is no meaning built into the E-TRAC position number. Instead, there are many data elements that are associated with the position record that can be searched or reported on such as Agency and Unit.
	Values	Reference table for values.

Regular/ Temporary	Display Only	No
	Required	Yes
	Default	Defaults to Temporary for Students
	SFSU Use	This field identifies the position as Regular or Temporary. The default of this field is Regular; override if necessary. Positions are defined as permanently or temporarily funded, not whether the employee assigned to the position is regular or temporary
	Values	There are two values for this field, Regular and Temporary.

Salary Grade	Display Only	No
	Required	Not for students. Payroll technicians will coordinate with Office of Student Financial Aid regulations.
	Default	Defaults to the lowest grade for the Job Code selected.
	SFSU Use	The Salary Grade is known to SFSU as the range for the classification code. This value will default to the lowest range for the job code selected.
	Values	The values in this field are determined by the Job Code (classification) selected.