4. E-TRAC Action-Reason Reference Guide

4.1.   About this Guide

This reference guide is intended to guide you when performing data changes using action-reason combinations in E-TRAC. Note: not all action/reason combinations are available for use in E-TRAC. Processes, guidelines, procedures and documentation may vary for different employee groups (staff, faculty, student). Please consult a Human Resources representative for specific information.

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.

4.1.1.   How to read the tables

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

Action Description	Type of Action
Reason Description	Reason for the Action

E-TRAC Notes	To be included in **Notes** section of E-TRAC pages. Substitute information in brackets with specific information.
Required Forms	The forms required in addition to the E-TRAC transaction.
Process Outside of E-TRAC	Steps you must follow outside of the E-TRAC process.
Guidelines	Includes guidelines or refers to guidelines outside of this guide.

4.1.2. Inventory of Action-Reason Combinations
Employee Change

Action	Reason
Data Change	Correction
	Extend Appointment
	Extend/Change Leave of Absence
	Extend/NDI
	Immediate Pay
	New Temporary Appointment or Reappointment (SFSU only)
	On NDI-Partial Return from Work
	Temporary Assignment to Permanent Assignment
	Temporary to Probationary/Permanent Appointment
Demotion	No associated reason
Earnings Distribution Change	Fund Source Change
Job Reclassification	In-Class Progression
	Job Code Change
Leave of Absence	FMLA/CFRA
	Medical
	Military Service
	Personal
	Professional
Pay Rate Change	Equity Adjustment
	In Range Progression
	General Salary Increase
	Market Adjustment
	Merit (All Bargaining Units)
	Service Salary Increase
	Student Pay Rate Change
	Time Base Change
Position Change	Position Update
Promotion	No Associated Reason
Retirement	Disability
	Service
Return from Disability	No Associated Reason
Return from Work Break	Pending Approval

	Return. Off Work Temp or FERP
	Return from Short Work Break
Return from Leave	Return from Paid LOA
	Return from Unpaid LOA
Short Term Disability with Pay	No Associated Reason
Short Work Break	No Associated Reason
Suspension	No Associated Reason
Termination	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
Transfer	Voluntary Reassignment

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	Rehire

Change Vacant Position

Action	Reason
Position Change	End Temp Job Reclassification
	In-Class Progress/Range Elevation

Job Reclassification
Temporary Job Reclassification

4.2. Employee Change (ECH)

Action Description	Data Change
Reason Description	Correction

E-TRAC Notes	Correction is requested because [identify item to correct].
Required Forms	The forms required depends on the type of correction.
Process Outside of E-TRAC	Contact your HR Services Representative prior to completing a correction in E-TRAC
Guidelines	

Action Description	Data Change
Reason Description	Extend Appointment

E-TRAC Notes	Appointment is extended for [number of months and days]. Position Description on file is current.
Required Forms	None
Process Outside of E-TRAC	Contact your HR Services Representative prior to completing an extension of an employee's appointment in E-TRAC. Receive approval from HR, then notify your employee of the extension in their temporary reassignment.
Guidelines	Refer to Compensation Guidelines.

Action Description	Data Change
Reason Description	Extend NDI

E-TRAC Notes	Extend or Change [include number of months] Leave of Absence.
Required Forms	Employee must present an extension for LOA: memo or LOA form
Process Outside of E-TRAC	Employee extension request must be approved prior to completing an E-TRAC transaction.
Guidelines	Refer to Leave of Absence Guidelines

Action Description	Data Change
Reason Description	Immediate Pay

E-TRAC Notes	HR Services Representative [insert name] approved Special Consultant or CEL payment; employee's documentation is complete or employee is scheduled to meet with [name of whom].
Required Forms	Special Consultant Form or CEL appointment form and complete/update Sign-In Forms: • Biographical #002 form • Application form • I-9 Form/Certification • Conditions of Employment #200 • Oath of Allegiance STD #689 • Designee to Receive Warrant #243 form • EAR (Employee Action Request) #686 form • Benefits Orientation Guide
Process Outside of E-TRAC	Follow Recruitment/Appointment Guidelines and/or Special Consultant/Independent Contractor Guidelines. Draft a position description and identify Job Code. After the Job Code is identified complete recruitment packet or special consultant packet, you may need to post position, interview, recommend to hire, complete Recommendation Form 171 and return applications/resume to HR. For special consultant, no posting is required.
Guidelines	Refer to the Recruitment Guidelines, Compensation Guidelines and Special Consultant/Independent Contractor Guidelines.

Action Description	Data Change
Reason Description	New Temporary Appointment or Reappointment (SFSU only)

E-TRAC Notes	Employee accepted Job [job number] -OR- this is an Emergency Hire [number of days] -OR- The employee is newly appointed with a temporary appointment end date. Employee's documentation is complete or Employee is scheduled to meet with [name].
Required Forms	Recruitment packet and/or Position Description and Work schedule.
Process Outside of E-TRAC	Follow Recruitment Guidelines. Draft a position description and identify Job Code. After the Job Code is identified complete the recruitment packet, post position, interview, recommend to hire, complete Recommendation Form #171, and return the application and resume to HR.
Guidelines	Recruitment Guidelines for posted positions and emergency hires.

Action Description	Data Change
Reason Description	On NDI-Partial Return to Work

E-TRAC Notes	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).
Required Forms	Employee must present Medical Release to HR and Administrator

Process Outside of E-TRAC	Employee must be on Leave - NDI; Contact HR Services Representative/Benefits/Leave Coordinator to identify effective date and eligibility to return to work.
Guidelines	Refer to Leave of Absence Guidelines.

Action Description	Data Change
Reason Description	Temporary Assignment to Permanent Assignment

E-TRAC Notes	E-TRAC is requested by HR Services Representative [insert name].
Required Forms	Position Description and Work schedule may be required.
Process Outside of E-TRAC	HR Services Representative may contact you to complete an ETRAC. A position description may need to be completed. If the position is funded temporarily, you must contact your Budget Analyst to assist you to identify if an approval memo is required prior to the ETRAC request.
Guidelines	Refer to Compensation Guidelines.

Action Description	Data Change
Reason Description	Temporary to Probationary/Permanent Appointment

E-TRAC Notes	[Name of HR Reviewer] requested for employee status change -OR- [Name of HR Reviewer] approved job code for posting, and employee accepted Job # [job number]. Employee's documentation is complete or Employee is scheduled to meet with [name].
Required Forms	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
Process Outside of E-TRAC	Follow HR Services Representative and/or Follow Recruitment Guidelines. Draft a position description and identify Job Code. After the Job Code is identified, complete a recruitment packet, post position, interview, recommend to hire, complete Recommendation Form #171 and return application and resume to HR. HR, Services will contact you to complete E-TRAC.
Guidelines	Refer to Recruitment Guidelines and Collective Bargaining Agreement Article.

Action Description	Demotion
Reason Description	Disciplinary Action

E-TRAC Notes	Employee accepted demotion.
Required Forms	Refer to Employee Relations Memo

Process Outside of E-TRAC	Refer to Employee Relations Memo
Guidelines	Refer to Progressive Discipline Guidelines

Action Description	Demotion
Reason Description	Voluntary

E-TRAC Notes	Employee accepted the position, Job # [job number]. -OR- Employee accepted a voluntary demotion.
Required Forms	Employee applied for a job=Application/Resume; CLO and/or employee Relations Director Memo/Approval.
Process Outside of E-TRAC	If the active/current employee applied/accepts a lower job code position, then, follow the Recruitment Process (refer to action: Hire).
Guidelines	Refer to Collective Bargaining Agreement Article.

Action Description	Earnings Distribution Change
Reason Description	Funding Source Change

E-TRAC Notes	Funding Source Change or Agency or Unit Change; Dept ID & Unit Change
Required Forms	Budget Analyst may request approval memo from Cabinet level Officer and/or President/Designee.
Process Outside of E-TRAC	Changing funding source and/or SCO Position Number change- Agency, Unit, and Serial.
Guidelines	Refer to Budget Procedures/Guidelines

Action Description	Job Reclassification
Reason Description	In-Class Progression

E-TRAC Notes	Classification request was reviewed/approved by CLO (name). HR Services Representative (name) identified effective date.
Required Forms	Position Description.
Process Outside of E-TRAC	Complete position description and receive approval for new/change of Job Code and/or Grade/Range/Skill Level. You may include previous Position Description and a justification memo.
Guidelines	Refer to Classification Program for Non-Faculty Bargaining Units.

Action Description	Job Reclassification
Reason Description	Job Code Change

E-TRAC Notes	Classification request was reviewed/approved by CLO (name). HR Services Representative (name) identified effective date.
Required Forms	Position Description
Process Outside of E-TRAC	Complete position description and receive approval for new/change of Job Code and/or Grade/Range/Skill Level. You may include previous Position Description and a justification memo.
Guidelines	Refer to Classification Program for Non-Faculty Bargaining Units.

Action Description	Leave of Absence
Reason Description	FMLA/CFRA

E-TRAC Notes	HR Services Representative/Benefits/Leave Specialist (name) identified effective date. Duration does not exceed one year.
Required Forms	Leave of Absence Form; Medical Certification unless Maternity Leave; Attendance Form #634
Process Outside of E-TRAC	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.
Guidelines	Leave of Absence Guidelines

Action Description	Leave of Absence
Reason Description	Medical

E-TRAC Notes	HR Services Representative/Benefits/Leave Specialist (name) identified effective date. Duration does not exceed one year.
Required Forms	Leave of Absence Form; Medical Certification unless Maternity Leave; Attendance Form #634
Process Outside of E-TRAC	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.
Guidelines	Leave of Absence Guidelines

Action Description	Leave of Absence
Reason Description	Military Service

E-TRAC Notes	HR Services Representative/Benefits/Leave Specialist (name) identified effective date. Duration does not exceed one year.

Required Forms	Original Military Leave documentation; Attendance Form #634
Process Outside of E-TRAC	Leave of Absence request must be reviewed/approved by HR prior to completing an ETRAC request. HR Services Representative/Benefits/Leave Specialist (name) identified effective date. Duration does not exceed one year.
Guidelines	Leave of Absence Guidelines

Action Description	Leave of Absence
Reason Description	Personal

E-TRAC Notes	HR Services Representative/Benefits/Leave Specialist (name) identified effective date. Duration does not exceed one year.
Required Forms	Leave of Absence Form; Attendance Form #634
Process Outside of E-TRAC	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.
Guidelines	Leave of Absence Guidelines

Action Description	Leave of Absence
Reason Description	Professional

E-TRAC Notes	HR Services Representative/Benefits/Leave Specialist (name) identified effective date. Duration does not exceed one year.
Required Forms	Leave of Absence Form; Attendance Form #634
Process Outside of E-TRAC	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.
Guidelines	Leave of Absence Guidelines

Action Description	Pay Rate Change
Reason Description	Equity Adjustment

E-TRAC Notes	HR Services Representative (name) identified effective date, (%) salary change and was approved by CLO (name).
Required Forms	Dean/Director memo and Position Description (may be required)
Process Outside of E-TRAC	Dean/Director memo; AVP, HRS&R Mgmt Summary and CLO approval; Position Description
Guidelines	Refer to Compensation Guidelines

Action Description	Pay Rate Change

Reason Description	In Range Progression

E-TRAC Notes	HR Services Representative (name) identified effective date, (%) salary change and was approved by CLO (name).
Required Forms	Dean/Director memo and Position Description (may be required)
Process Outside of E-TRAC	Dean/Director memo; AVP, HRS&R Mgmt Summary and CLO approval; Position Description
Guidelines	Refer to Compensation Guidelines

Action Description	Pay Rate Change
Reason Description	General Salary Increase

E-TRAC Notes	
Required Forms	
Process Outside of E-TRAC	This E-TRAC is created by Human Resources Designee only.
Guidelines	

Action Description	Pay Rate Change
Reason Description	Market Adjustment

E-TRAC Notes	HR Services Representative (name) identified effective date, (%) salary change and was approved by CLO (name).
Required Forms	Dean/Director memo and Position Description (may be required)
Process Outside of E-TRAC	Dean/Director memo; AVP, HRS&R Mgmt Summary and CLO approval; Position Description
Guidelines	Refer to Compensation Guidelines

Action Description	Pay Rate Change
Reason Description	Merit (all bargaining units)

E-TRAC Notes	HR Services Representative (name) identified effective date, (%) salary change and was approved by CLO (name).
Required Forms	Dean/Director memo and Position Description (may be required)
Process Outside of E-TRAC	Dean/Director memo; AVP, HRS&R Mgmt Summary and CLO approval; Position Description
Guidelines	Refer to Compensation Guidelines

Action Description	Pay Rate Change
Reason Description	Service Salary Increase

E-TRAC Notes	
Required Forms	Performance Evaluation Form
Process Outside of E-TRAC	For Staff, Service Salary Increases are posted by Human Resources or campus designee.
Guidelines	Refer to Collective Bargain Agreement Article

Action Description	Pay Rate Change
Reason Description	Student Pay Rate Change

E-TRAC Notes	
Required Forms	Complete a Work-Study Clearance.
Process Outside of E-TRAC	
Guidelines	Refer to Student Employment Guidelines.

Action Description	Pay Rate Change
Reason Description	Time Base Change

E-TRAC Notes	Time base changed was approved by HR Services Representative (name). The actual salary rate is $.
Required Forms	Work schedule Form and Position Description may need to be updated
Process Outside of E-TRAC	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.
Guidelines	Refer to Collective Bargaining Agreement Article and Permanent Status for Less than Full-Time Employees Procedure.

Action Description	Promotion
Reason Description	Promotion (Not for E-TRAC Creator)

E-TRAC Notes	Employee accepted Job # . Employee's documentation is complete or Employee is scheduled to meet with (name).

Required Forms	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. Employee Benefits Eligibility may change.
Process Outside of E-TRAC	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.
107 Translation	107 = New Hire, Probationary or Temporary.
Guidelines	Refer to Recruitment Guidelines and Compensation Guidelines.

Action Description	Position Change
Reason Description	Position Update

E-TRAC Notes	Confirmed with Budget Analyst regarding new position number
Required Forms	Budget LCD form may be required.
Process Outside of E-TRAC	Dept ID, position number, funding must be established prior to using a new position number
Guidelines	

Action Description	Retirement
Reason Description	Disability

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

Action Description	Retirement
Reason Description	Disability

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

Action Description	Retirement
Reason Description	Service

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

Action Description	Retirement
Reason Description	Service

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

Action Description	Return From Disability
Reason Description	Ret from IDL - Off Pay Stat

E-TRAC Notes	Ret from IDL - Workers' Comp
Required Forms	Medical Release/Certification
Process Outside of E-TRAC	Employee or HR notified dept to complete ETRAC; Medical certification was given to the Workers' Comp Coordinator or Leave Coordinator (name) identified effective dates.
Guidelines	Refer to Workers' Compensation Guidelines.

Action Description	Return From Disability
Reason Description	Ret from IDL/TD - On Pay Stat

E-TRAC Notes	Employee returning to Full (FTE) from IDL/TD
Required Forms	Medical Release/Certification
Process Outside of E-TRAC	Employee or HR notified dept to complete ETRAC; Medical certification was given to the Workers' Comp Coordinator or Leave Coordinator (name) identified effective dates.
Guidelines	Refer to Workers' Compensation Guidelines.

Action Description	Return From Disability
Reason Description	Ret from NDI - Full Return

E-TRAC Notes	Ret from NDI - Full Return
Required Forms	Medical Release/Certification
Process Outside of E-TRAC	Employee or HR notified dept to complete ETRAC; Medical certification was given to the Workers' Comp Coordinator or Leave Coordinator (name) identified effective dates.
Guidelines	Refer to Collective Bargaining Agreement Article and Leave of Absence without pay Guidelines.

Action Description	Return From Disability
Reason Description	Ret from TD - Off Pay Stat

E-TRAC Notes	Employee or HR (name) notified dept of return.
Required Forms	Medical Release/Certification
Process Outside of E-TRAC	Employee or HR notified dept to complete ETRAC; Medical certification was given to the Benefits/Leave Coordinator (name) identified effective dates.
Guidelines	Refer to Collective Bargaining Agreement Article and Leave of Absence without pay Guidelines.

Action Description	Return From Disability
Reason Description	Return from NDI - Benefits Exp

E-TRAC Notes	Employee returning from disability.
Required Forms	Medical Release/Certification
Process Outside of E-TRAC	Employee or HR notified dept to complete ETRAC; Medical certification was given to the Benefits/Leave Coordinator (name) identified effective dates.
Guidelines	Refer to Collective Bargaining Agreement Article and Leave of Absence without pay Guidelines.

Action Description	Return From Work Break
Reason Description	Pending Approval

E-TRAC Notes	Employee pending Workers' Comp

Required Forms	Workers' Comp Forms
Process Outside of E-TRAC	Contact the Workers' Comp Specialist/Benefits/Leave Specialist.
Guidelines	Refer to Worker's Compensation and Leave of Absence Guideline

Action Description	Return From Work Break
Reason Description	Return from Short Work Break

E-TRAC Notes	Employee return from IDL Workers' Comp (FT)
Required Forms	Medical Release/Certification
Process Outside of E-TRAC	Contact the Workers' Comp Specialist/Benefits/Leave Specialist.
Guidelines	Refer to Workers' Compensation Guidelines and Leave of Absence Guidelines.

Action Description	Return from Leave
Reason Description	Return from Paid LOA

E-TRAC Notes	Refer to Leave of Absence Determination Form [date].
Required Forms	Leave of Absence Form and/or Employee Memo identified Effective Date and Return from Leave Date.
Process Outside of E-TRAC	Approval memo and/or Leave Form from college/department for CLO or President/Designee approval.
Guidelines	Refer to Leave of Absence Guidelines.

Action Description	Return from Leave
Reason Description	Return from Unpaid LOA

E-TRAC Notes	Supervisor (name) or Leave Coordinator (name) identify effective dates and time base (FTE).
Required Forms	Leave of Absence Form and/or Employee Memo identified Effective Date and Return from Leave Date
Process Outside of E-TRAC	If the employee is returning prior to the expected return date (refer to Leave of Absence Form); then the employee must compose a memo to indicate change of expected return date.
Guidelines	Refer to Leave of Absence Guidelines

Action Description	Short Work Break
Reason Description	Off Pay Status

E-TRAC Notes	Benefits/Leave Specialist (name) identified effective date.
Required Forms	Dean/Administrator Memo
Process Outside of E-TRAC	Contact the Employee Relations Director or Workers' Comp Specialist/Benefits/Leave Specialist
Guidelines	Refer to Workers Compensation Guidelines and Leave of Absence Without Pay Guidelines

Action Description	Short Work Break
Reason Description	Pending Legal Action

E-TRAC Notes	Pending Result
Required Forms	Dean/Administrator Memo
Process Outside of E-TRAC	Contact the Employee Relations Director
Guidelines	Refer to Collective Bargaining Agreement Article

Action Description	Short Work Break
Reason Description	Pending NDI/IDL/TD/Disb Ret

E-TRAC Notes	Employee Pending NDI/IDL/TD/Disb Retirement
Required Forms	Workers' Compensation or Medical Certification or NDI Forms
Process Outside of E-TRAC	Contact the Workers' Comp Specialist/Benefits/Leave Specialist
Guidelines	Refer to Workers Compensation Guidelines and Leave of Absence Without Pay Guidelines

Action Description	Suspension
Reason Description	Suspension

E-TRAC Notes	Employee Relations Director/Designee (name) confirmed effective date.
Required Forms	Employee Notification from Employee Relations Manager
Process Outside of E-TRAC	Refer Labor Relations Memo and Suspension Guidelines
Guidelines	Refer to Collective Bargaining Agreement Article

Action Description	Termination
Reason Description	Auto Resignation/AWOL

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

Action Description	Termination
Reason Description	Cancelled Appointment

E-TRAC Notes	Employee did not work; no work time was reported.
Required Forms	
Process Outside of E-TRAC	
Guidelines	

Action Description	Termination
Reason Description	Death

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

Action Description	Termination
Reason Description	Dismissal

E-TRAC Notes	Employee Relations Director/Designee identified effective date.
Required Forms	Dean/Administrator Memo, Performance Evaluations and all employee notification
Process Outside of E-TRAC	Employee must also complete Attendance Form #634 and schedule a Clearance appointment.

Guidelines	Refer to Performance Management Guidelines, Progressive Discipline Guidelines

Action Description	Termination
Reason Description	End Temporary Appointment

E-TRAC Notes	Employee's appointment is ending/not being reappointed.
Required Forms	Identify Last Day Physically Worked on the E-TRAC
Process Outside of E-TRAC	Employee must also complete Attendance Form #634 and schedule a Clearance appointment. Contact Payroll Specialist.
Guidelines	Refer to Clearance Guidelines.

Action Description	Termination
Reason Description	Rejected During Prob/NonRetentn

E-TRAC Notes	Employee Relations Director/Designee identified effective date.
Required Forms	Dean/Administrator Memo, Performance Evaluations and all employee notification
Process Outside of E-TRAC	Employee must complete Attendance Form #634 and schedule a Clearance appointment.
Guidelines	Refer to Performance Management Guidelines, Progressive Discipline Guidelines, Clearance Guidelines.

Action Description	Termination
Reason Description	Resignation

E-TRAC Notes	Employee is scheduled for a Clearance Procedure; Hand Delivered original resignation letter/memo to HR, Representative (name).
Required Forms	Original Employee resignation letter/memo.
Process Outside of E-TRAC	Employee must compose a resignation memo/letter, complete Attendance Form #634 and schedule a Clearance appointment. Contact Payroll Specialist
Guidelines	Refer to Clearance Guidelines

Action Description	Termination
Reason Description	Resignation - Better Job

E-TRAC Notes	Employee is scheduled for a Clearance Procedure; Hand Delivered original resignation letter/memo to HR, Representative (name)
Required Forms	Original Employee resignation letter/memo. Identify Last Physical Day Worked.
Process Outside of E-TRAC	Employee must compose a resignation memo/letter, complete Attendance Form #634 and schedule a Clearance appointment. Contact Payroll Specialist.
Guidelines	Refer to Clearance Guidelines

Action Description	Termination
Reason Description	Resignation - Better Pay

E-TRAC Notes	Employee is scheduled for a Clearance Procedure; Hand Delivered resignation letter/memo to HR, Representative (name)
Required Forms	Original Employee resignation letter/memo. Identify Last Physical Day Worked.
Process Outside of E-TRAC	Employee must compose a resignation memo/letter, complete Attendance Form #634 and schedule a Clearance appointment. Contact Payroll Specialist.
Guidelines	Refer to Clearance Guidelines

Action Description	Termination
Reason Description	Resignation – Dissatisfied

E-TRAC Notes	Employee is scheduled for a Clearance Procedure; Hand Delivered resignation letter/memo to HR, Representative (name)
Required Forms	Original Employee resignation letter/memo. Identify Last Physical Day Worked.
Process Outside of E-TRAC	Employee must compose a resignation memo/letter, complete Attendance Form #634 and schedule a Clearance appointment. Contact Payroll Specialist.
Guidelines	Refer to Clearance Guidelines

Action Description	Termination
Reason Description	Resignation - Personal Reasons

E-TRAC Notes	Employee is scheduled for a Clearance Procedure; Hand Delivered resignation letter/memo to HR, Representative (name).
Required Forms	Original Employee resignation letter/memo; refer to Last Physical Day Worked.
Process Outside of E-TRAC	Employee must compose a resignation memo/letter, complete Attendance Form #634 and schedule a Clearance appointment. Contact Payroll Specialist.
Guidelines	Refer to Clearance Guidelines

Action Description	Transfer
Reason Description	In Lieu - Recall Rights Waived

E-TRAC Notes	
Required Forms	
Process Outside of E-TRAC	Employee Relations Memo/Notification; Contact Employment Representative
Guidelines	Refer to Collective Bargaining Agreement

Action Description	Transfer
Reason Description	Involuntary Reassignment

E-TRAC Notes	Reassignment was approved by (name).
Required Forms	Position Description, Memo to the Employee, Work Schedule
Process Outside of E-TRAC	Position Description is reviewed and HR Services Representative identified Job Code, Grade; Employee Relations Director/Designee approved reassignment
Guidelines	Refer to Collective Bargaining Agreement

Action Description	Transfer
Reason Description	Medical Reasons

E-TRAC Notes	Reassignment was approved by (name).
Required Forms	Position Description, Memo to the Employee, Work Schedule
Process Outside of E-TRAC	Position Description is reviewed and HR Services Representative identified Job Code, Grade; Employee Relations Manager approved reassignment
Guidelines	Refer to Collective Bargaining Agreement

Action Description	Transfer
Reason Description	"Pay Plan Chg w/ Fin Settlement"

E-TRAC Notes	Faculty Appointment
Required Forms	
Process Outside of E-TRAC	
Guidelines	Refer to Collective Bargaining Agreement - R03

Action Description	Transfer
Reason Description	Pay Plan Chg w/o Fin Settlemnt

E-TRAC Notes	Faculty Appointment
Required Forms	
Process Outside of E-TRAC	
Guidelines	Refer to Collective Bargaining Agreement - R03

Action Description	Transfer
Reason Description	Reinstatement - Prop Rejected

E-TRAC Notes	Reinstatement was approved by (name).
Required Forms	Labor Relations Memo, Position Description, Memo to the Employee, Work Schedule
Process Outside of E-TRAC	Employee Relations Memo/Notification
Guidelines	Refer to Collective Bargaining Agreement

Action Description	Transfer
Reason Description	Reinstatement - Temp Assign

E-TRAC Notes	Reinstatement was approved by (name).
Required Forms	Labor Relations Memo, Position Description, Memo to the Employee, Work Schedule
Process Outside of E-TRAC	Employee Relations Memo/Notification
Guidelines	Refer to Collective Bargaining Agreement

Action Description	Transfer
Reason Description	Voluntary Reassignment

E-TRAC Notes	Reassignment was approved by (name).
Required Forms	Position Description, Memo to the Employee, Work Schedule, Application/Resume
Process Outside of E-TRAC	Position Description is reviewed and HR Representative identified Job Code, Grade Step; Employee Relations Manager or HR Designee approved reassignment

Guidelines	Refer to Collective Bargaining Agreement

4.3. Employee Hire (HIR)

Action Description	Hire
Reason Description	Appointment

E-TRAC Notes	Identify the project name and supervisor name. employee's documentation is complete or Employee is scheduled to meet with [name of person].
Required Forms	Special Consultant Form or CEL appointment form, and Sign-In Forms: Biographical #002 form, Application form, I-9 Form/Certification, Conditions of Employment #200, Oath of Allegiance STD #689, Designee to Receive Warrant #243 Form, EAR (Employee Action Request) #686 Form, Benefits Orientation Guide.
Process Outside of E-TRAC	Follow Recruitment/Appointment Guidelines and/or Special Consultant/Independent Contractor Guidelines: draft a position description and identify Job Code; after the Job Code is identified complete recruitment packet or special consultant packet; you may need to post position, interview, recommend to hire, complete Recommendation Form #171 and return applications/resume to HR; for special consultant, no posting required; HR will contact you to complete an E-TRAC. For Social Security Number and Date of Birth for a current employee, you may use SFSU ID.
Guidelines	Refer to Recruitment Guidelines, Non-Posted Emergency Hire Guidelines, Compensation Guidelines.

Action Description	Hire
Reason Description	Appointment

E-TRAC Notes	Retired Annuitant; Employee's documentation is complete or Employee is scheduled to meet with (name): Employee was informed to monitor hours worked per fiscal year. Empl Class: Rehired Annuit
Required Forms	Sign-In Forms: Biographical #002 form, Application form, I-9 Form/Certification, Conditions of Employment #200, Oath of Allegiance STD #689, Designee to Receive Warrant #243 Form, EAR (Employee Action Request) #686 Form, Benefits Orientation Guide.
Process Outside of E-TRAC	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.
Guidelines	Refer to Recruitment Guidelines, Non-Posted Emergency Hire Guidelines, Compensation Guidelines

Action Description	Hire (Emergency or Short Term Hire)

Reason Description	Appointment (Not for E-TRAC Creator)

E-TRAC Notes	(Name of HR Reviewer) approved job code for posting. Employee accepted Job # - OR- This is an Emergency Hire (# of days). Employee's documentation is complete or Employee is scheduled to meet with (name). Empl Class: Emergency Hire
Required Forms	Sign-In Forms: Biographical #002 form, Application form, I-9 Form/Certification, Conditions of Employment #200, Oath of Allegiance STD #689, Designee to Receive Warrant #243 Form, EAR (Employee Action Request) #686 Form, Benefits Orientation Guide.
Process Outside of E-TRAC	Follow Recruitment Guidelines: Complete a position description and identify Job Code; after the Job Code is identified. For Social Security number and Date of Birth for the current employee, you may use SFSU ID.
Guidelines	Refer to Recruitment Guidelines, Non-Posted Emergency Hire Guidelines, Compensation Guidelines

Action Description	Hire (New Hire or Concurrent Hire)
Reason Description	Appointment

E-TRAC Notes	Name of HR Reviewer) approved job code for posting. Employee accepted Job # - OR- This is an Emergency Hire (# of days). Employee's documentation is complete or Employee is scheduled to meet with (name)
Required Forms	Sign-In Forms: Biographical #002 form, Application form, I-9 Form/Certification, Conditions of Employment #200, Oath of Allegiance STD #689, Designee to Receive Warrant #243 Form, EAR (Employee Action Request) #686 Form, Benefits Orientation Guide.
Process Outside of E-TRAC	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 may contact you to complete ETRAC. For Social Security Number and Date of Birth for Current Employee, you may use SFSU ID.
Guidelines	Refer to Recruitment Guidelines, Non-Posted Emergency Hire Guidelines, Compensation Guidelines

Action Description	Hire
Reason Description	Appt Former Employee Prior PS

E-TRAC Notes	(Name of HR Reviewer) approved job code for posting. Employee accepted Job #. Employee's documentation is complete or Employee is scheduled to meet with (name)
Required Forms	Sign-In Forms: Biographical #002 form, Application form, I-9 Form/Certification, Conditions of Employment #200, Oath of Allegiance STD #689, Designee to Receive Warrant #243 Form, EAR (Employee Action Request) #686 Form, Benefits Orientation Guide.

Process Outside of E-TRAC	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 may contact you to complete E-TRAC. For Social Security Number and Date of Birth for Current Employee, you may use SFSU ID.
Guidelines	Refer to Recruitment Guidelines, Non-Posted Emergency Hire Guidelines, Compensation Guidelines.

Action Description	Employee Hire
Reason Description	Concurrent Job

E-TRAC Notes	Concurrent Employee
Required Forms	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.
Process Outside of E-TRAC	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 may contact you to complete ETRAC; pay particular attention to additional/overload appointment guidelines.
Guidelines	Refer to Recruitment Guidelines, Non-Posted Emergency Hire Guidelines, Compensation Guidelines

Action Description	Employee Hire (Special Consultant or CEL Appointment)
Reason Description	Concurrent Job

E-TRAC Notes	Employee's Concurrent Job Identify the Project name and supervisor name; Employee's documentation is complete or Employee is scheduled to meet with (name); Concurrent Employee
Required Forms	Special Consultant Form or CEL appointment form, and 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.
Process Outside of E-TRAC	Follow Recruitment/Appointment Guidelines and/or Special Consultant/Independent Contractor Guidelines: draft a position description and identify Job Code; after the Job Code is identified complete recruitment packet or special consultant packet; you may need to post position, interview, recommend to hire, complete Recommendation Form #171 and return applications/resume to HR; for special consultant, no posting required.
Guidelines	Refer to Recruitment Guidelines, Non-Posted Emergency Hire Guidelines, Compensation Guidelines.

Action Description	Rehire
Reason Description	Rehire

E-TRAC Notes	(Name of HR Reviewer) approved job code for posting. Employee accepted Job #. Employee's documentation is complete or Employee is scheduled to meet with (name).
Required Forms	Sign-In Forms: Biographical #002 form, Application form, I-9 Form/Certification, Conditions of Employment #200, Oath of Allegiance STD #689, Designee to Receive Warrant #243 Form, EAR (Employee Action Request) #686 Form, Benefits Orientation Guide.
Process Outside of E-TRAC	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 may contact you to complete E-TRAC. For Social Security Number and Date of Birth for Current Employee, you may use SFSU ID.
Guidelines	Refer to Recruitment Guidelines, Non-Posted Emergency Hire Guidelines, Compensation Guidelines.

Action Description	Rehire (Special Consultant or CEL Appointment)
Reason Description	Rehire

E-TRAC Notes	Identify the Project name and supervisor name; Employee's documentation is complete or Employee is scheduled to meet with (name).
Required Forms	Special Consultant Form or CEL appointment form, and Sign-In Forms: Biographical #002 form, Application form, I-9 Form/Certification, Conditions of Employment #200, Oath of Allegiance STD #689, Designee to Receive Warrant #243 Form, EAR (Employee Action Request) #686 Form, Benefits Orientation Guide.
Process Outside of E-TRAC	Follow Recruitment/Appointment Guidelines and/or Special Consultant/Independent Contractor Guidelines: draft a position description and identify Job Code; after the Job Code is identified complete recruitment packet or special consultant packet; you may need to post position, interview, recommend to hire, complete Recommendation Form #171 and return applications/resume to HR; for special consultant, no posting required; HR, Services may contact you to complete ETRAC. For Social Security Number and Date of Birth for Current Employee, you may use SFSU ID.
Guidelines	Refer to Recruitment Guidelines, Non-Posted Emergency Hire Guidelines, Compensation Guidelines.

4.4.   Change Vacant Position (CPS)

Action Description	(Vacant) Position Change
Reason Description	End Temp Job Reclassification

E-TRAC Notes	PD was reviewed/approved by HR Services Representative (name)
Required Forms	Position Description
Process Outside of E-TRAC	Complete position description and receive approval for new/change of Job Code and/or Grade/Range/Skill Level. Refer to the Recruitment process and Classification Standards. For funding changes, contact Budget Specialist.
Guidelines	Refer to Budget Procedures/Guidelines and Classification Program for Non-Faculty Bargaining Units

Action Description	(Vacant) Position Change
Reason Description	In-Class Progress/Range Elev

E-TRAC Notes	PD was reviewed/approved by HR Services Representative (name)
Required Forms	Position Description
Process Outside of E-TRAC	Complete position description and receive approval for new/change of Job Code and/or Grade/Range/Skill Level. Refer to the Recruitment process and Classification Standards. For funding changes, contact Budget Specialist.
Guidelines	Refer to Budget Procedures/Guidelines and Classification Program for Non-Faculty Bargaining Units

Action Description	(Vacant) Position Change
Reason Description	Job Reclassification

E-TRAC Notes	PD was reviewed/approved by HR Services Representative (name)
Required Forms	Position Description
Process Outside of E-TRAC	Complete position description and receive approval for new/change of Job Code and/or Grade/Range/Skill Level. Refer to the Recruitment process and Classification Standards. For funding changes, contact Budget Specialist.
Guidelines	Refer to Budget Procedures/Guidelines and Classification Program for Non-Faculty Bargaining Units

Action Description	(Vacant) Position Change
Reason Description	Temporary Job Reclassification

E-TRAC Notes	PD was reviewed/approved by HR Services Representative (name)
Required Forms	Position Description
Process Outside of E-TRAC	Complete position description and receive approval for new/change of Job Code and/or Grade/Range/Skill Level. Refer to the Recruitment process and Classification Standards. For funding changes, contact Budget Specialist.

Guidelines	Refer to Budget Procedures/Guidelines and Classification Program for Non-Faculty Bargaining Units

4.5. New Position (NPS)

Action Description	Position Change
Reason Description	New Position

E-TRAC Notes	PD was reviewed/approved by HR Services Representative (name)
Required Forms	Position Description
Process Outside of E-TRAC	Complete position description and receive approval for new/change of Job Code and/or Grade/Range/Skill Level. For funding changes, contact Budget Specialist.
Guidelines	Refer to Recruitment Guidelines and Classification Standards

4.6. Other: Non-ETRAC

Action Description	Data Change
Reason Description	License/Certification Update

E-TRAC Notes	
Required Forms	Employee must present Original License/Certificate to Administrator/Designee; copy of license to Human Resources
Process Outside of E-TRAC	Update license/certificate information with HR.
Guidelines	EE or Admin Designee could submit the update

Action Description	Data Change
Reason Description	Education/Degree Update

E-TRAC Notes	
Required Forms	Employee completes a Biographical Form 002 and submits to HR
Process Outside of E-TRAC	
Guidelines	BIO 002 is passed to each HR functional unit

Action Description	Data Change
Reason Description	Change Non-Citizen Status

E-TRAC Notes	
Required Forms	Employee completes a Biographical Form 002 and shows the original VISA change/extension; completes/verify to update I-9 form
Process Outside of E-TRAC	Contact Human Resources Representative.
Guidelines	BIO 002 is passed to each functional unit