

TEACHING ASSOCIATE PROCESSING GUIDELINES

Revised December 2007

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Personnel Transaction Form (PTF) Guidelines (p. 6 – 10)

A. Eligibility

- Classification in a master's degree program that is related to the discipline to which the individual is assigned (In accordance with CSU policy, **credential students** are not eligible for this position.)
- A student must be enrolled for at least 4 units (**but not more than 12 units**) *each semester during their appointment until they have registered for all work on the approved program.* (If the student has less than 6 units remaining, they will not be required to register for additional units just to meet the requirement, but must be enrolled in continuous enrollment units.)
- Minimum 3.0 overall graduate GPA (2.75 if newly admitted)
- Evidence of satisfactory progress toward completion of degree
- Open University and full / part-time Sacramento State staff are **not eligible.**
- Only **ACADEMIC DEPARTMENTS** may hire TAs.

B. Special Considerations

Newly admitted students must have earned an undergraduate overall GPA of not less than 2.75 and not less than 3.0 in the last 60 units

Once a student has registered for thesis/project units, they will have **one additional semester** of **graduate assistant** eligibility. **NOTE:** If a student does not finish the thesis/project after the additional semester and wishes to continue as a graduate assistant, the department must provide a written request to the Associate Dean, Office of Graduate Studies. The request must indicate the

progress being made and an estimated date of completion for consideration of additional semesters of graduate assistant eligibility.

SUMMER / WINTER BREAK ENROLLMENT

- Enrollment - Students are not required to be enrolled in courses during breaks.
- Summer Bridge Program –ISAs, TAs, or GAs are not part of Summer Bridge.
- Departments / program units only need to submit one PTF and one application (per position) for the entire summer.

C. Student Application Process

- The student fills out the top half of the GA / TA application (one per position) and signs it.
- **International Students** holding F1 or J1 visas must secured approval from the Office of Global Education PRIOR TO SUBMITTING application to department / program unit
- The GA / TA application is taken directly to the department / program unit.

D. Department / Program Unit Application & PTF Processing Procedures

1. When selecting applicants, departments / program units must verify that students meet the **minimum** qualifications prior to submitting paperwork to the Office of Graduate Students.

2. **Multiple Positions** - A separate GA / TA application (copies of original accepted) and an original PTF must be submitted for each position assigned (no more that a combined total of 20 hours per week). **NOTE:** Each teaching unit is the equivalent of 2.66 hours.

3. Verify the following information on all student applications:

- Information on other positions & hours being worked
- Address or name changes
- Verification from the Office of Global Education (if applicable).
- **NOTE:** It is recommended that departments / program units verify the residency status of all students (see page 5)

4. The department / program unit completes the lower-half of the GA / TA application:

- Assign number of units. **NOTE:** While enrolled in courses, appointments must be less than full-time (7.5 units). Half-time appointment for Teaching Associates cannot be waived while students are enrolled in courses
- Complete section regarding Dean's Fee Waiver (if applicable) – *Available to limited number of students*
- Have the chair or unit administrator sign GA / TA application
- Complete graduate student information:
 - GPA
 - Units Enrolled
 - Residency Status (see page 4)
 - Units Completed
 - Classification

5. Personal Transaction Form (PTF) must be completed (see page 6 for details) for each position.

NOTE: Verify that the name and address match the GA / TA application

6. Departments / program units are required to submit 4 photocopies of the original PTF, GA / TA application and FWS form (if applicable) to the Office of Graduate Studies (zip: 6112) for each position. **DO NOT STAPLE COPIES TOGETHER!**

E. Office of Graduate Studies Application & PTF Processing

📌 **Students may not work until they have returned their signed offer letter to the Office of Graduate Studies and gone to Payroll* (see section 3 below)**

1. Verification of Application & PTF Information

▪ **NOTE:** PTF and GA/TA applications with missing copies, incomplete or incorrect information will be returned to the department / program unit. Re-submitted applications will require an additional 10 days to process.

2. Offer Letter Disbursement

- It will take approximately ten (10) working days to generate an offer letter for each position
- Departments / programs units will be notified via email when an offer letter is ready
- Departments / programs units have a choice of either:
 - picking up the letters for disbursement
 - notify the student, so that they may pick up the letter in person
 - having our office mail the offer letter directly to the student's home address

NOTE: Once the offer letter has left the Office of Graduate Studies the department / program unit may not open or alter the letter in any way

📌 **Lost / Never Received Offer letters - Please contact the Office of Graduate Studies immediately!**

3. Signed Offer Letter

- Signed original offer letters must be returned directly to the Office of Graduate Studies. Faxes or photocopies will not be accepted.
- A student may start their position within **24-48 hours** after the signed offer letter has been returned to the Office of Graduate Studies **AND** that the student has gone to the ***Payroll Office** (accompanied by a copy of the offer letter, which is included with the original) to complete the following:
 1. New hire paperwork
 2. Make deduction changes to W2 form
 3. Changes to address or name
 4. Complete direct deposit paperwork (if applicable)
- The Office of Graduate Studies will forward the signed original offer letter to the hiring department / program unit, which needs to be filed in a separate 'employee' file
- Original PTF will be forwarded to Payroll for processing

F. Revisions to Offer Letters, Applications or PTFs

ALL revisions must include a **Unit 11 – Revisions** form, which is to be submitted to the dean and chair for approval.

- **Increasing or Decrease Teaching Units**
 - All changes must follow the Collective Bargaining Agreement Guidelines
 - It is recommended that TAs stay below 6.5 (including any other Unit 11 positions) teaching units per semester

- **Increasing / Decrease in Pay**
 - All changes must follow the Collective Bargaining Agreement guidelines & appropriate salary amounts noted on the Salary Schedule for TAs

- **Declining / Abandoning a Position**
 - If a student decides to decline a position or abandons a work assignment, they are still required to sign and return the offer letter to the Office of Graduate Studies. **The offer letter allows a student to decline a position**
 - The original offer letter will be forwarded to the department / program unit

- **Change in Start or End Dates**
 - TAs start and end dates are set by the Chancellors Office / Payroll each semester
 - Please contact the Office of Graduate Studies, if you have questions

- **Change of Position** - Please contact the Office of Graduate Studies.

G. Separation PTF

Separation PTFs are only required when a student:

- leaves the University completely or graduates
- leaves a position prior to the end date noted on original PTF
- will no longer be working for a department / program center

H. Student Support

- **DO NOT refer students to the Office of Graduate Studies** (Exception: Returning original signed offer letter or to drop off updates). Department / program unit staff should work directly with the student.
- If the department / program unit staff is unable to answer a student's question, please have **staff** contact the Office of Graduate Studies.

I. Verifying Residency Status

All international students must have clearance from the Office of Global Education prior to submitting paperwork to the Office of Graduate Studies. See CMS Shortcuts sheet for information on how to determine a student's residency status.

J. Student Tracking

- How will departments / program units know if a student has been sent or if they have returned their offer letter?

- The Office of Graduate Studies will email each department / program unit representative the name(s) of students who have an offer letter ready for pick up
- The original offer letter will be sent to the department / program unit after it has been process by the Office of Graduate Studies.
- An email will be sent after the semester has started with status of each application and PTF turned in.
- If student name is missing please contact Diana Duran at durand@csus.edu immediately!

**For detailed information regarding the
Collective Bargaining Agreement, please visit the Chancellor's website at:

http://www.calstate.edu/LaborRel/Contracts_HTML/CBA_Contract/index.shtml

Personnel Transaction Form (PTF) Guidelines

TEACHING ASSOCIATES

Please note that salaries are subject to a General Salary Increase (GSI). Consult the Unit 11 - Collective Bargaining Agreement (p. 32) for more information.

TOP SECTION OF PTF: Lines 1 - 6

Date - Enter date that PTF is prepared.

Line 1 - Empl ID (Employee ID)

Current Employee - Enter 9-digit Empl ID or the Empl ID of a former employee, if separated after 4/1/03 (reappointments).

New Employee - Leave this blank. PeopleSoft will assign an Empl ID for a new employee when the new employee is processed by Payroll Services or FSA.

Line 2 - Name

- ▶ Check prefix box (Mr., Ms., or Dr.)
- ▶ Enter employee's last name, first name and middle initial.
- ▶ **NOTE:** Please make sure that the name on the GA / TA application matches the PTF.

Line 3 - Address

- ▶ Enter the employee's address and phone number.
- ▶ **NOTE:** Confirm that the address on the GA/TA application matches with PTF. If different, a student must go to the Payroll Office to update information.

Line 4 - Employee Action

- ▶ NEW vs. RE-APPOINTMENT?
 - **Who would be considered a new appointment?**
 - Students new to the position
 - If a student switches from one position to another
 - **Who would be considered a reappointment?** Students who have previously worked the exact same position within a department program unit. No changes.

Line 5 - Explanation or Remarks

- ▶ Provide details for all transactions (if necessary).

Line 6 - Position Type (Check a box)

- ▶ **New** - A new position was created for this appointment
- ▶ **Funding Change** - Change in funding for an existing position
- ▶ **Pool** - Temporary position which allows multiple hires in a department

- ▶ **Position Change** - Change to an existing position
- ▶ **Replacement** - A position exists for this appointment. Enter the name of the person being replaced

SECTION A – PTF Lines 7-12

General Information

Line 7 Old / Unchanged Information (Re-Appointments Only!)

- ▶ Enter **ALL** of the following information:
 - Pay Title
 - Department Work Location
 - Campus Zip

Line 8 New Appointments / Information

- ▶ Enter **ALL** of the following information:
 - Pay Title
 - Department Work Location
 - Campus Zip

Position Information

- **See line 9 & 12 for re-appointment information**
- **See line 10, 11 & 12 for new hire information**

Line 9 Old / Unchanged Information (Re-Appointments ONLY!) – Must be completed, if applicable.

- ▶ **CMS Position Number** – Enter existing 8-digit CMS position number
- ▶ **Dept ID** - Department where position is paid.
- ▶ **Job Code** - Enter code number: **2354**
- ▶ **Empl Rec** - Employee's record number for the position.
 - **NOTE:** If an employee has two or more concurrent positions, they will have multiple employee record numbers in CMS.
- ▶ **CBID** – Enter code number: **11**
- ▶ **End Date**
 - Leave line 9 blank
 - Enter **end** date on **line 10**
 - *☞ Departments / program units will be sent a memo with current dates for each semester*
- ▶ **Grade** - Enter code number: **1**

- ▶ **Step - Leave blank**
- ▶ **Time Base** - Write time base as a fraction. The time base is determined by the hiring department.
 - **How to write a TA time base as a fraction:** Write the number of units taught per week over the number 15.
 - **Example:** If a TA teaches 6 units, then you write their time base as **6/15**.
 - **Things to keep in mind:**
 - TA's are paid by the total units they teach each week
 - Each unit is worth **2.66 hours** of teaching time
 - **Any time a TA works more than 7.5 units per week, they will be entitled to benefits**
 - TAs may not teach more than 15 units per week
 - TA's receive **six payments** for each semester
- ▶ **Monthly Salary**
 - **Determining monthly salary range**
 - Determine the **base salary (see Unit 11 Salary Schedule)**
 - Fill in line 21 with the **base salary** information
 - Divide the number of units by 15, then multiply by the base salary
 - **Example:** If a student is hired to work 6 units per week and the monthly salary (determined by the department) is \$1733*, then the total monthly salary will be \$669.60.
 - Divide 6 (units worked by student) by 15 (full time units) and then multiply the results by the monthly base salary.
 - OR $6 \text{ units} \div 15 \text{ units} = 0.4 \times \$1733^* = \$693.20$ per month

*See Unit 11 Salary Schedule for actual amounts.

Line 10 **New Appointment / Information – Must be completed, if applicable.**

- ▶ **CMS Position Number**
 - Enter the 8-digit position number provided by the Budget Office or new appointment
 - An existing number from spring semester, if there are no changes in funding source
- ▶ **Dept ID** - Department where position is paid
- ▶ **Job Code** – Enter code number: **2354**
- ▶ **Empl Rec**
 - Enter the employee's record number for the position.
 - If an employee has **two or more concurrent positions**, they will have multiple employee record numbers in CMS.
- ▶ **CBID** - Enter code number: **11**

- ▶ **Effective Date**
 - ☞ *Departments / program units will be sent a memo with current dates for each semester*

- ▶ **End Date**
 - ☞ *Departments / program units will be sent a memo with current dates for each semester*

- ▶ **Grade** - Enter code number: **1**

- ▶ **Step** - *Leave blank*

- ▶ **Time Base** - Write time base as a fraction. The time base is determined by the hiring department.
 - **Things to keep in mind...**
 - TA's are paid by the total units they teach each week.
 - Each unit is worth **2.66 hours** of teaching time.
 - **Any time a TA works more than 7.5 units per week, they will be entitled to benefits.**
 - TAs may not teach more than 15 units per week (full time).
 - TA's receive **six payments** for each semester.

 - **How to write a TA time base as a fraction:** Write the number of units taught per week over the number 15.
 - **Example:** If a TA teaches 6 units, then you write their time base as **6/15**.

- ▶ **Monthly Salary** - *Refer to most recent Unit 11 Salary Schedule*

- ▶ **Monthly Salary**
 - **Determining monthly salary range**
 - Determine the **base salary** (See Unit 11 Salary Schedule)
 - Divide the number of units by 15 then multiply by the base salary

 - **Example:** If a student is hired to work 6 units per week and the monthly salary (determined by the department) is \$1733*, then the total monthly salary will be \$693.20
 - Divide 6 (units worked by student) by 15 (full time units) and then multiply the results by the monthly base salary
 - OR $6 \text{ units} \div 15 \text{ units} = 0.4 \times \$1733^* = \$693.20$ per month

*See Unit 11 Salary Schedule for actual amounts

Line 11 - New Position Fund Source - Must be completed

CMS Fund—5-digit number; e.g., MDS01

Line 12 - Reports to: Fill in the following information (**DO NOT LEAVE BLANK!**)

- ▶ CMS position number
- ▶ Graduate Coordinator

- ▶ Department name
- ▶ Job code of the
- ▶ Supervisor of this position (used for new positions or reorganization only)

SECTION B

Line 21 - Base Pay - Enter appropriate base pay for new hires and re-appointments.

Class Code	Range Code	Class Title	Salary Range
2354	1	TEACHING ASSOCIATE – ACAMEMIC YEAR MASTER’S PROGRAM	See Time Line or Salary Schedule

*** NOTE:** Refer to most recent Unit 11 Salary Schedule & salary increases.

SECTION E

Approval Signatures – The signatures for both the department and program center will be required (if applicable).

Updated: November 24, 2008