Enter TAE Appointment Data – 16th Unit (020) Additional Employment

Overview

This job aid shows appointment data entry employees how to initiate temporary academic appointments for Additional Employment appointment type 020 – 16th unit payments.

- [Search for employees by Empl ID](#)
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Before you begin

You will need to:

- ☐ Know their employment status: Full-time, Part-time, or Rehired Annuitant (Ineligible).

- ☐ Know the position number (available options for your department will be listed)

- ☐ Know the dates, what semester will have the course overload

- ☐ Obtain approval from the Office of Faculty Affairs and/or Vice Provost of Faculty Success for the course overload (WTU above 15). Save to OneDrive.

You should be familiar with the following documents:

- [CFA CBA - Article 36 – Additional Employment](#)
- [CFA CBA – Article 20 – Workload](#)
- [Office of Faculty Affairs – Additional Employment Website](#)

Search for employees by Empl ID

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

Action	Information

2. Enter search criteria for the employees that you want to retrieve.
 	
   - Business Unit (campus)
   - EE Group: **08 Additional Employment**
   - Empl ID
   - Lookback Dt
	Search Criteria
	
	Business Unit: SACST *EE Group: 08 Empl ID: 100079537 Dept ID:
	CSU SACRAMENTO Additional Employment Mickey Mouse
	
	• Verify that the Business Unit is correct
	• EE group is required, enter 08.
	• Key the Empl ID or click the magnifying glass next to the Empl ID field to search by name or ID.
	
	Look Up Empl ID
	Empl ID begins with ▼
	Name begins with ▼ Mickey Mouse
	Look Up Clear Cancel Basic Lookup
	Search Results
	View 100 First ◀ 1 of 1 ▶ Last
	Empl ID Name Business Unit
	100081754 Mickey Mouse SACST
	
	Look Up Empl ID
	Empl ID begins with ▼
	Name begins with ▼ James Dean
	Look Up Clear Cancel Basic Lookup
	No matching values were found.
	
	• Lookback Date: This field is set by default to look back 18 months.

Action 2 Notes:

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

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

Action	Information
3. Click **Search**.	Search Employees are retrieved from Job Data. If an employee has worked multiple consecutive jobs, the most recent job is retrieved.
4. Review the results	Does your search return a row for the faculty you want to key? • If not then you will add a new row via "Add new Person". • If a data row is returned for the faculty you want to key you will need to review that row to determine if you will need to add a new row via "Add new Person" or use the returned row to enter the new appointment data.

Action 4 Notes:

If a data row for the faculty you want to key is returned, check the following:
- Does the returned row include effective dates which overlap with the appointment you are attempting to key?
- Is the Dept ID for that row different from the Dept ID you want to use?
- Is the Job Code (2403 or 2359) for that row different than the Job Code you want to use?
  - If **yes** to *any* of the above you will need to add a new row via "Add new Person"
  - If **no** to *all* of the above you can use the returned row to enter the new appointment data.

Search for employees by Dept ID

Action	Information
1. Navigate to CSU TAE Appointment Data Entry	⃠ Menu > CSU Temp Academic Employment > CSU TAE Appointment Data Entry.
2. Enter search criteria for the employees that you want to retrieve. - Business Unit (campus) - EE Group: **08 Additional Employment** - Dept ID - Lookback Dt	**Search Criteria** **Business Unit:** SACST ***EE Group:** 08 **Empl ID:** **Dept ID:** 15100 CSU SACRAMENTO Additional Employment English • Verify that the Business Unit is correct • EE group is required, enter 08. • Key the Dept ID for the fund source connected to the Additional Employment payment. • Lookback Dt.: You can edit this date.

Action 2 Notes:

Leaving the Empl ID field blank and keying a Dept ID will return all employees with Additional Employment appointments in Job Data under that Dept ID since the date in the Lookback Dt field. As long as you have CHRS security access for the Dept ID searched.

3. Click **Search**.	Search Employees are retrieved from Job Data. If an employee has worked multiple consecutive jobs, the most recent job is retrieved.
4. Review the results	Does your search return a row for the faculty you want to key? • If not then you will add a new row via "Add new Person". • If a data row is returned for the faculty you want to key you will need to review that row to determine if you will need to add a new row via "Add new Person" or use the returned row to enter the new appointment data.

Action 4 Notes:

If a data row for the faculty you want to key is returned, check the following:
- Does the returned row include effective dates which overlap with the appointment you are attempting to key?
- Is the Dept ID for that row different from the Dept ID you want to use?
- Is the Job Code (2403 or 2359) for that row different than the Job Code you want to use?
  - If **yes** to *any* of the above you will need to add a new row via "Add new Person"
  - If **no** to *all* of the above you can use the returned row to enter the new appointment data.

Check employee work history

Action	Information
1. **Optional**: Under the **Empl Stat** column you may click the status (Active, Terminated…) value for an employee to view an employee's work history.	**Empl Stat** Active ← TF Job History Empl ID: |	Empl Rcd	EffDt	Eff Seq	Position Nbr	Business Unit	Dept ID	Dept Name
---	---	---	---	---	---	---
1	0	10/26/2020	0	10003885	FLCMP	10067	Counseling
2	1	10/26/2020	0	10004044	FLCMP	10067	Counseling
3	2	04/29/2008	0	10007085	FLCMP	10283	EE Ext Prgrms-Professional Dev
4	3	08/01/2019	0	10007074	FLCMP	10311	EE Degree Programs-Special Ses	
Action 1 Notes: Workload is listed as WTU and FTE in Job History and can be used to determine if the faculty member has the workload capacity to accept additional employment.	

Optional: Add new Person
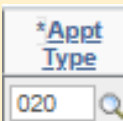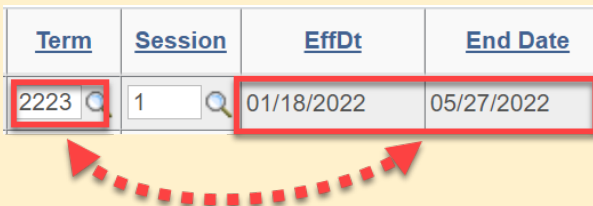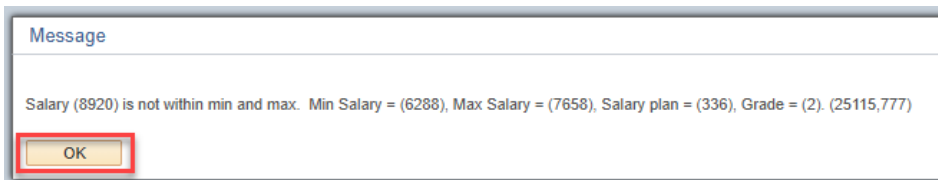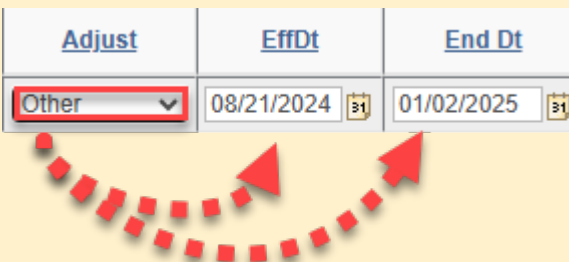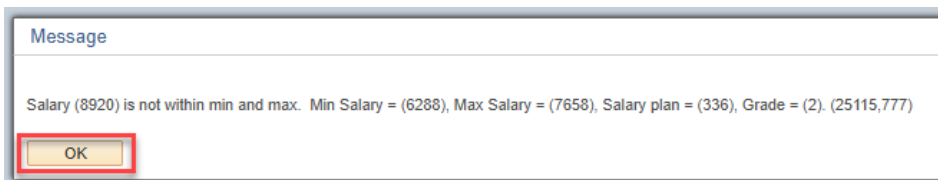
If the employee is not in the search results, use this procedure to add an employee record. The employee must already have an Empl ID and SacLink email address.

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

Enter appointment data

- Employee data rows stretch across the page. You must use the scroll bar to see the entire row. This procedure shows fields sequentially from the left to the right of the same row.

- When you select the appointment type, some of the fields change. Be sure to follow the instructions for the correct appointment type.

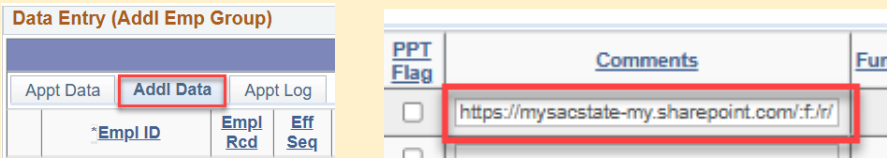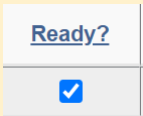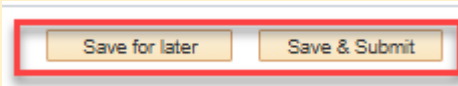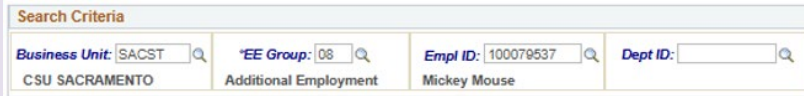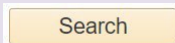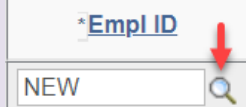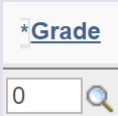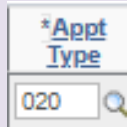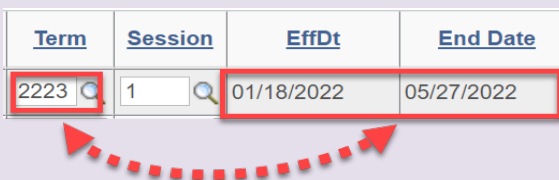| Action	Information
1. Verify and update the **Position Nbr** field, if appropriate.	***Position Nbr** 10006468
Action 1 Notes: This field is generally updated if there are funding changes. If updating a row and the current position number is associated with another Dept ID <u>stop</u>, check this employee's other data rows. If none of the employee's rows are associated with the appropriate Dept ID a new row will need to be added via "<u>Add new Person</u>". Only active position numbers are allowed. You can use the magnifying glass next to the position number field to search for position numbers. Search via Dept ID using the Department field. Note that each position number is connected to a specific chart-string (fund source) and job code. If one does not exist for the fund source you need to use and have a 2403 job code a new Position Nbr will need to be created. Do so by following the Budget Office's current process for generating new position numbers.	
Action	**Information**
2. Verify the **Job Code**.	**Job Code** The Job Code pulls from the position number. 2403
Action 2 Notes: If faculty are taking on a course overload (WTU over 15) you would use a position number with job code **2403**. Tenured/tenure-track faculty are not generally eligible for payment via additional employment process for course overloads.	
3. Verify and update the **Grade**, if appropriate.	***Grade** 0
Action 3 Notes: Grade will pull from the position number. If the Job Code is 2403 the Grade will always be 0.	

Action	Information
4. Click the magnifying glass next to the Appt Type field and select **Appt Type 020**	*Appt Type 020
Action 4 Notes: Appt. Type is required. For a 16th Unit (course overload) appointment select type 020. The faculty member must have an active 2358 appt in the same department for the AY Monthly Base Rt to auto-complete. If they do not contact your College Analyst for guidance.	
5. Click the magnifying glass next to the **Term** field to select a semester term.	**Term** | **Session** | **EffDt** | **End Date** 2223 | 1 | 01/18/2022 | 05/27/2022
Action 5 Notes: The Term value auto-completes the Effective Date and End date for the term chosen. A pop-up window similar to the one shown below will trigger. Click OK. Message Salary (8920) is not within min and max. Min Salary = (6288), Max Salary = (7658), Salary plan = (336), Grade = (2). (25115,777) OK	
6. **Optional**: Select Other in the Adjust field if the 16th unit will not be worked the full term.	**Adjust** | **EffDt** | **End Dt** Other | 08/21/2024 | 01/02/2025
Action 6 Notes: After selecting Other the EffDt and End Date fields become editable. Edit as needed. A pop-up window similar to the one shown below may trigger. Click OK. Message Salary (8920) is not within min and max. Min Salary = (6288), Max Salary = (7658), Salary plan = (336), Grade = (2). (25115,777) OK	

Action	Information
7. Review the AY Monthly Base Rt field.	**AY Monthly Base Rt** 6,000.00

Action 7 Notes:

AY Monthly Base Rt will auto-complete if the faculty has an active 2358 appointment in the same Department (Dept. ID). If it does not contact your College Analyst for guidance.

Action	Information
8. Enter the Weighted Teaching Units (WTU).	***WTU** 1.000000000

Action 8 Notes:

You will be entering the WTU for the overage. The first 15 WTU should be included on their primary contract. A 16th unit would be entered as 1.0 WTU. Click the magnifying glass next to the WTU field to review acceptable WTU values.

Action	Information
9. **Restricted**: Do not use the Assign Title (assignment title) or Project fields.	**Assign Title** 🚫 **Project** 🚫

Action	Information						
10. Review the **Act Pay** columns from January to December and the **Sum Payment** column.	**March Act Pay**	**April Act Pay**	**May Act Pay**	**June Act Pay**		**December Act Pay**	**Sum Payment**
	256.80	1,968.87	1,968.87	805.44			5,000.00

Action 10 Notes:

Act Pay (Actual Pay) for each month is calculated from the base rate, WTU and the term's pay period. This amount is the gross payment amount and does not include tax and benefits deductions. Sum Payment is the overall gross payment amount.

Action	Information
11. **Restricted**: Do not check the REH Annuit or Diff Appt fields.	REH Annuit 🚫 Diff Appt 🚫

Action 11 Notes:

Caution: Do not use the REH Annuit (Rehired Annuitant) or Diff Appt fields. Rehired Annuitants are ineligible for 16th unit appointments.

Action	Information
12. **Add a link** to the additional employment support materials in the Comments field, located on the "Addl Data" tab.	Data Entry (Addl Emp Group) / Appt Data **Addl Data** Appt Log / *Empl ID* / Empl Rcd / Eff Seq / PPT Flag / **Comments** / Fun / https://mysacstate-my.sharepoint.com/:f:/r/

Action 12 Notes:

Support materials should be saved in a shared OneDrive file. A link to this folder should be added to the comments section, which can be found on the "Addl Data" tab of the data entry screen. Support materials for 16th unit appointments must include the following:

- **Approval** – An email from the OFA Director or Vice Provost of Faculty Success approving the course overage
- **Reason –** The reason for the course load overage
- **Amount –** How many WTU the overage will be
- **Semester –** The semester in which the course load overages will occur.

A common format for these support materials is the email chain in which all details of the overage are discussed and approval from the OFA Director or Vice Provost of Faculty Success is given.

Action	Information
14. Select **Ready** if the entire row is correct and ready for processing.	Ready? ☑

Action	Information
15. Click **Save & Submit** or **Save for Later**	Save for later Save & Submit

Action 15 Notes:

If you click **Save & Submit** a pop-up box will appear informing you of the total number of rows that were successfully submitted. It will also include any errors you may need to correct for those that did not. You will need to correct these errors before attempting to resubmit. If you click **Save for Later** you can return to complete or update rows at a future date.

Entering Additional Employment (16th Unit) – Quick Sheet

Action	Information
1. Navigate to CSU TAE Appointment Data Entry	⊘ Menu > CSU Temp Academic Employment > CSU TAE Appointment Data Entry.
2. Enter search criteria for the employees that you want to retrieve via EE Group 08 and Dept ID and/or Empl ID.	Search Criteria — Business Unit: SACST, CSU SACRAMENTO; *EE Group: 08, Additional Employment; Empl ID: 100079537, Mickey Mouse; Dept ID: .... If you are unable to locate a faculty member via the "Look Up Empl ID" feature by name or by ID the faculty member skip to action 4 and "Add new Person"
3. Click Search.	Search
4. Review the results	If the faculty whose appointment you are attempting to key does not appear in the search results, or they do and; the job code is not 2403, you need to use a different Dept ID, or the returned row is for an active appointment with dates that overlap with the semester term dates, add a new row by clicking "Add new Person". Otherwise use the returned row to key the new appointment. Click - Add new Person and use *Empl ID NEW to add a new row.
5. Add or update the **Position Nbr** field, if appropriate.	*Position Nbr 10006468
6. Verify the **Job Code**.	Job Code 2403 — For 16th unit appointments the job code will always be 2403.
7. Verify and update the **Grade**, if appropriate.	*Grade 0 — For the 2403 Job Code the Grade will always be 0.
8. Click the magnifying glass next to the Appt Type field and select **Appt Type 020**	*Appt Type 020
9. Click the magnifying glass next to the **Term** field to select a semester term.	Term: 2223, Session: 1, EffDt: 01/18/2022, End Date: 05/27/2022 — Effected dates will auto-complete based on term entered.

10. **Optional**: Select Other in the Adjust field if the 16th unit will not be worked the full term.	**Adjust** [Other ▼] **EffDt** 08/21/2024 **End Dt** 01/02/2025		The EffDt and End Dt fields will become editable. Edit as needed.
11. Review the AY Monthly Base Rt field.	**AY Monthly Base Rt** 6,000.00		AY Monthly Base Rt will auto-complete if the faculty has an active 2358 appointment in the same Department (Dept. ID). If it does not contact your College Analyst for guidance
12. Enter the Weighted Teaching Units (WTU).	***WTU** 1.000000000		Enter the WTU overage amount.
13. **Restricted**: Do not use the Assign Title or Project fields.	**Assign Title** 🚫 **Project** 🚫		
14. Review the **Act Pay** columns from January to December and the **Sum Payment** column.	**January Act Pay** / **February Act Pay** / **March Act Pay** 256.80 / **April Act Pay** 1,968.87 / **May Act Pay** 1,968.87 / **June Act Pay** 805.44 / ⋮ / **December Act Pay** **Sum Payment** 5,000.00		
15. **Restricted**: Do not check the REH Annuit or Diff Appt fields.	**REH Annuit** 🚫 **Diff Appt** 🚫		Do not use the REH Annuit (Rehired Annuitant) or Diff Appt fields. Rehired Annuitants are ineligible for 16th unit appointments.
16. **Add a link** to the additional employment support materials in the Comments field, located on the "Addl Data" tab.	215 **PPT Flag** ☐ **Comments** https://mysacstate-my.sharepoint.com/:f:/r/ **Fund**		The support materials should include an email chain containing justification and approval from OFA for the overage.
17. Select **Ready** if the entire row is correct and ready for processing.	**Ready?** ☑		
18. Click **Save & Submit** or **Save for Later**	[Save for later] [Save & Submit]		

Additional Employment Appointment - Editing guidelines

Use these guidelines when you enter Additional Employment data within 08 EE group.

If you need to…	Do this…	Result
Enter an appointment for an employee who is in search results if the following is true; the Dept ID and Job Code is not changing <u>and</u> the effective dates for the new appointment do not overlap with a current appointment.	• After finding the individual within your department, edit the existing row for that employee via Enter appointment data.	• Approval workflow begins • If approved, appointment notification sent • Appointment entered into Job Data
Enter an appointment for an employee who is not in the search results by adding a new row if the following is true; The Dept ID or the Job Code is changing, or effective dates for the new appointment overlap with a current appointment.	• Optional: Add new Person • Edit the new row for that employee	• Approval workflow begins • If approved, appointment notification sent • Appointment entered into Job Data
Revise an existing appointment. Example: • Increase or decrease compensation amount • Change end date of appointment • Update faculty workload for project	• Enter the Appt Type and EffDt to retrieve an existing row • Edit the existing row for that employee • Click Yes to disregard the warning that the term already exists in the history table • Other Action field defaults to **Revision**	• Approval workflow begins • If approved, appointment notification sent • If revisions approved, a new REVISED appointment notification is generated • Appointment entered into Job Data
• Cancel an existing appointment after it is loaded to Job Data	• Contact OFA if you need to cancel an appointment.	• Approval workflow begins • If cancellation approved, Cancelation notification is generated. • Job is canceled in Job Data.

Appendix: Other Actions relevant to Additional Employment appointments.

This appendix explains the Other Actions menu choices relevant to Additional Employment (EE Group 08)

Action	What it does
Canceled	• Used to cancel an appointment either in the middle of the approval process or after the transaction has been loaded to job. • This action sends a notification to the employee and adds a canceled row to job data. • Contact OFA if you need to cancel an appointment.
Revision	• Used to update an appointment either in the middle of the approval process or after the transaction has been loaded to Job Data. • This action sends a notification to the employee. • Adds a DTA/CNR to Job Data.

Additional Employment (AE) Appointment – TAE Submission workflow

★ Does the faculty member have a previous appointment data row in TAE?

Yes

No

Does the data row have the same Dept ID and Job Code 2403, and do the effective dates in the returned row not overlap with the appointment you want to key?

Click "Add New Person" to add a row

Yes

Add or update additional employment appointment data according to appointment type. Or if revisions or a cancelation is required do so, updating action field accordingly. Save & Submit for review and approval.

Yes

Was the Additional Employment appointment approved?

No

A notification will be sent to the faculty.

After the notification has been sent does the appointment need to be revised or canceled?

Yes

No

Once it is time for payment to be issued the appropriate approval level will release payment

Appointment will load to Job Data. ★