

**THE CALIFORNIA STATE UNIVERSITY**  
**Office of the Chancellor**  
**401 Golden Shore**  
**Long Beach, California 90802-4210**  
**(562) 951-4411**

**Date:** September 15, 2004

**Code:** **TECHNICAL LETTER**  
**HR/Salary 2004-17**

**To:** Associate Vice Presidents/Deans of Faculty  
Human Resources Directors  
Payroll Managers

**From:** Cathy Robinson   
Assistant Vice Chancellor  
Human Resources Administration

Cordelia Ontiveros   
Senior Director  
Academic Human Resources

**Subject:** **Implementation of Unit 11 – Academic Student Employees**

The California State University (CSU) and the California Alliance of Academic Student Employees/International Union, United Automobile, Aerospace, and Agricultural Implement Workers (UAW) have reached agreement regarding exclusive representation of specified student employees as defined below. This technical letter outlines the implementation procedures for the new bargaining unit.

**Conversion Information:**

<b>Effective Date:</b>	October 1, 2004
<b>New Unit:</b>	Unit 11 (R11)
<b>Unit Name:</b>	Academic Student Employees
<b>Included Classifications:</b>	<ul style="list-style-type: none"> <li>• Teaching Associates (class codes 2353, 2354)</li> <li>• Graduate Assistants (class codes 2355, 2325)</li> <li>• Instructional Student Assistants (new class codes 1150 and 1151). Class code 1151 is available for Instructional Student Assistants who work on campus and whose appointments are funded by the federal work-study program.</li> </ul>
<b>Appointment Type:</b>	Temporary
<b>Conversion Transaction:</b>	<ul style="list-style-type: none"> <li>• 126 Transaction for Teaching Associates and Graduate Assistants</li> <li>• A52 Transaction for Instructional Student Assistants</li> </ul>

**Conversion Instructions:**

Current employment provisions (e.g., benefits, salary ranges, retirement participation) will not change as a result of the recognition and implementation of the new bargaining

**Distribution:**

CSU Chancellor  
CSU Presidents  
Vice Presidents, Student Affairs  
Vice Presidents, Administration

Vice Chancellor, Human Resources  
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unit. Instructional Student Assistants retain the same employment provisions/conditions as Student Assistants hired in class codes (1870, 1871, 1874, 1875, and 1868). Current provisions (e.g., retirement participation, benefit programs) provided to employees will continue until the CSU and UAW bargain otherwise.

- **Teaching Associates (TAs) and Graduate Assistants (GAs)**

Human Resources-Information Support and Analysis and the State Controller's Office (SCO) will process a 126 transaction for all TAs and GAs between October 1-21, 2004. This is necessary to generate the new collective bargaining ID R11 on employee records. PIMS Item 215 will indicate CONV TO R11. TAs and GAs will continue to be paid on a monthly or academic year basis.

***Campus Conversion Responsibilities:***

- All TAs and GAs whose appointments have expired or are set to expire on or before September 30, 2004 should be separated by COB on September 30, 2004; otherwise, they will be inappropriately converted to the new Unit 11 bargaining unit after their TA/GA assignments have ended.
- CIRS Compendium Report X91, Cycle 0410, will provide campuses with a list of TAs and GAs who were converted to Unit 11 by the SCO. This report will be available to campuses on October 6, 2004.
- For campuses using the CMS Baseline system, each campus will need to update its CMS database to reflect the SCO's conversion of TAs and GAs.

- **Instructional Student Assistants:**

The agreement with the UAW requires that a student is classified as an Instructional Student Assistant (ISA) in an individual department or equivalent organizational unit if he/she performs grading, tutoring or instruction for a majority of his/her work hours during the duration of the academic term in that individual department or equivalent organizational unit on a CSU campus. Only Student Assistants who teach, grade or tutor CSU students (as opposed to non-CSU students) are to be classified as ISAs. The ISA classification and qualification standard is provided in Attachment A.

***Campus Conversion Responsibilities:***

- Reclassification deadline: October 21, 2004 payroll cutoff.
- Effective October 1, 2004, appoint the appropriate Student Assistants who are currently in class codes 1870, 1871, 1874, 1875, and 1868 to the appropriate ISA classification (class code 1150 or 1151) via the A52 transaction. Hourly rates do not change as a result of this conversion.
  - ✓ Process the A52 transaction as a separate rostered position sequence. Do not post it within the same position sequence as the A98 shell transaction.
  - ✓ PIMS Item 215 (Employment History Remarks) should indicate "CONV TO R11."
  - ✓ PIMS Item 505 (Retirement Account Code) should be set at "N" as ISAs continue to be exempt from Social Security and Medicare taxes, provided the student meets the student FICA exemption

addressed in Internal Revenue Code 3121(b)(10) during the academic term. (See HR 98-05 for student FICA exemption guidelines.)

- ✓ PIMS Item 825 (Non Citizen Status Code) continues to be available to campuses for tracking and maintaining pertinent non-citizen status-related information for students previously in the “Student-Nonresident Alien Tax Status” classification (class code 1868).

### **On-Going Administration:**

- **Teaching Associates and Graduate Assistants**

Employment provisions including benefit programs for TAs and GAs will not change as a result of the recognition agreement. Campuses should continue their current business employment practices. TAs and GAs will continue to be paid on the master/monthly payroll cycle. New appointments keyed after the updated Pay Scales is in place on October 1, 2004 will automatically be placed in the new Unit 11 bargaining unit (CB ID R11).

- **Instructional Student Assistants:**

- ISAs are appointed in temporary hourly/intermittent rostered positions. Unlike Student Assistants who are hired in a “shell” student appointment (via A98 transaction), appointment (A52) and separation (S31) transactions must be generated for ISAs. Do not post the A52 transaction within the same position sequence as an A98 shell transaction (if one previously existed).
- The pay period for ISA classifications is consistent with the state pay periods used for master/monthly payroll. Pay for ISA appointments is to be processed with other rostered hourly/intermittent appointments.
- ISAs continue to be exempt from Social Security and Medicare taxes, provided the student meets the student FICA exemption addressed in Internal Revenue Code 3121(b)(10) during the academic term. Retirement Account Code (PIMS Item 505) should be set at “N.”
- Students who still qualify for an ISA appointment during breaks/summer term are not to be reappointed in the “Bridge” Student Assistant classification (1874). ISAs who work during the academic break are enrolled in Department of Personnel Part-time, Seasonal, Temporary (DPA PST) retirement plan in lieu of Social Security. Because ISA appointments are now rostered, campuses can change the PIMS Retirement Account Code to trigger DPA PST and Medicare withholding (set PIMS Item 505 = “TM”). If the appointment has expired, post a new A52 transaction with Item 505 = TM.
- Student Assistants classified as ISAs are not reclassified to an unrepresented student classification for the duration of the entire academic term even if their duties change. If a Student Assistant has more than one simultaneous separate appointment, each appointment is classified separately.
- Student Assistants including Instructional Student Assistants may be hired in one or many departments at a campus.

**Next Steps:**

Now that the CSU and UAW have reached agreement regarding exclusive representation of TAs, GAs, and ISAs, the CSU and UAW will bargain the full contract provisions. If employment provisions change as a result of future bargaining, a subsequent technical letter will be issued.

Questions regarding this technical letter may be directed to Human Resources Administration at (562) 951-4411. This document is available on Human Resources' Web site at: <http://www.calstate.edu/HRAdm/memos.shtml>.

CR/gc

Attachment



## Instructional Student Assistant

*Class Code: 1150 or 1151*

*Date Established: 10-01-04*

### OVERVIEW:

Under supervision, Instructional Student Assistants in this classification perform teaching, grading or tutoring duties for the majority of work hours in a given appointment in a given academic department or equivalent administrative unit over the course of an academic term. Assignments are made by academic department or equivalent administrative unit by a specific supervisor at a CSU campus.

Incumbents in this classification work part-time (typically 20 hours per week) during academic periods and may work full-time during academic break periods. Incumbents may have concurrent assignments in other Student Assistant classifications as long as the maximum hours are not exceeded.

### DISTINGUISHING FEATURES:

The Instructional Student Assistant classification is distinguished from other Student Assistant classifications by the nature of work performed. The majority of work performed in a given appointment in a given academic department or equivalent administrative unit over the course of an academic term by Instructional Student Assistants is tutoring, grading and/or teaching work while the other Student Assistants perform other duties including clerical, technical, custodial, laborer or other work as assigned.

Classification code 1151 (On-Campus Work-Study) is for Work-Study students funded by the Federal Work-Study Program. Appointments to this classification code must meet provisions of the Federal Work-Study Program and are not limited by a maximum number of hours.

### TYPICAL QUALIFICATIONS:

#### ***Knowledge and Abilities:***

Incumbents must possess the ability to learn and perform assigned work; work cooperatively with faculty, staff, and other students; and accept responsibility. Completion of specific coursework may be required in order to teach, grade or tutor a course.

#### ***Special Qualification:***

- ◆ Admission or registration as a CSU student.
- ◆ On-Campus Work-Study Instructional Student Assistants must meet the eligibility requirements of the Federal Work-Study Program, as determined by the campus' financial aid office.