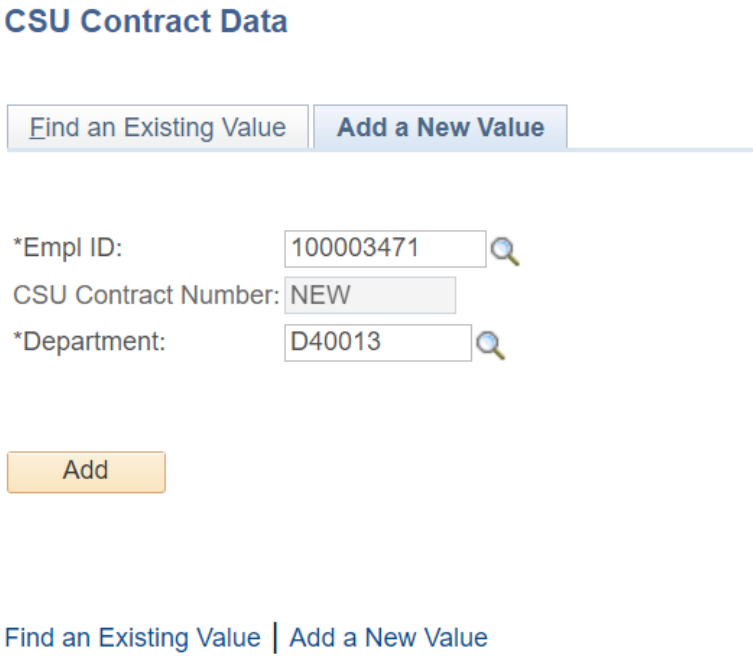**Table of Contents** **Page**

Processing Steps

The first step in Creating a New Coach Faculty Contract is to navigate to the correct PeopleSoft page and enter the appointment information for the contract.

Create a New Coach Faculty Contract

The CSU Temporary Faculty Contract Data component is used to process appointment data for coaches. Once entered, this data is used by the Athletics Department to print the Coach Transaction Form, by APS for compliance review and appointment letter generation, and by Payroll to complete the onboarding process to ensure correct payment to the coach.

- ⓘ To create a contract, the coach must have an Empl ID – either an already existing ID, or an ID created through the PageUp onboarding process. Please contact APS for questions regarding hiring new coaching faculty.
- ⓘ This component refers to the temporary faculty "contract". The "contract" that is printed at the end of this process is called a Coach Transaction Form. At the end of the process, the coach will still receive an appointment letter from APS. The "contract" conveys the details of the coach appointment to Payroll for payment processing.

Navigation: CSU Temp Faculty → CSU Contract Data
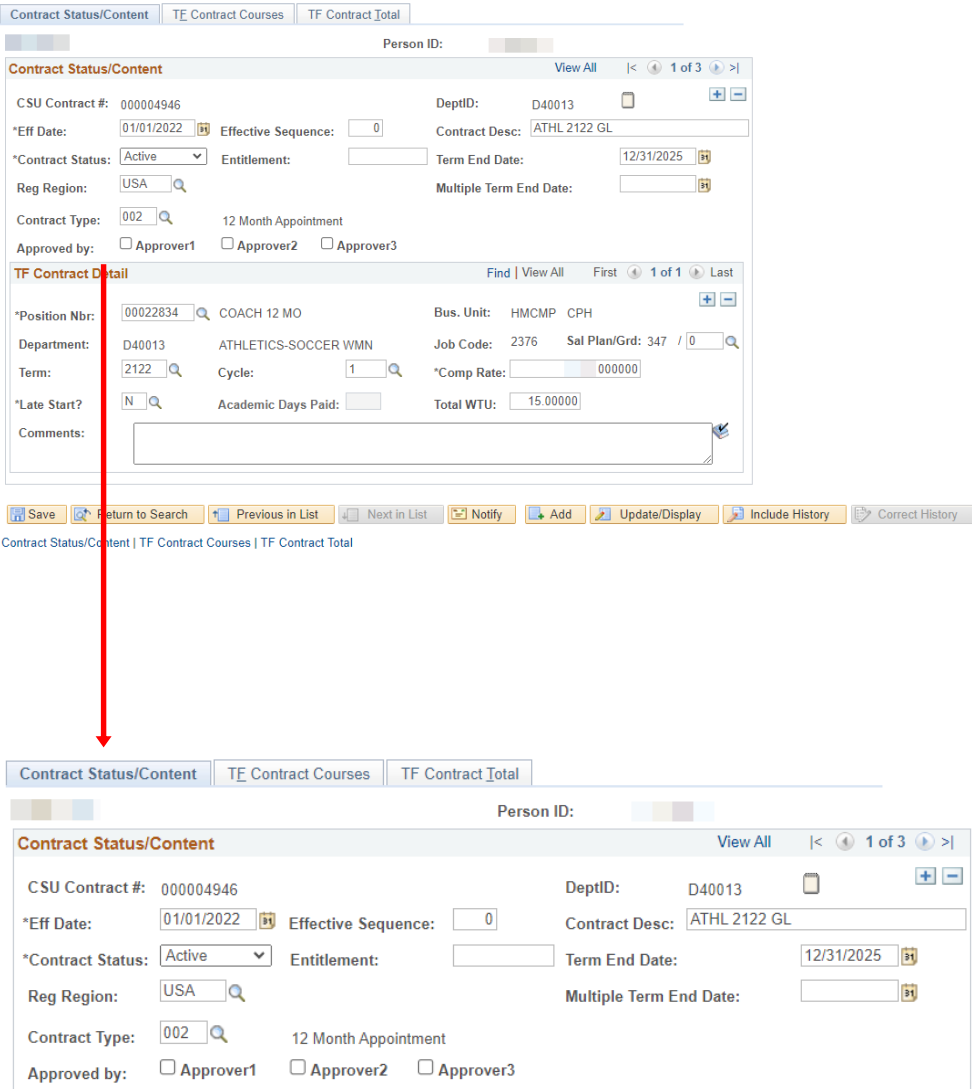
Processing Steps	Screen Shot
1. Click on the <u>Add a New Value</u> tab. 2. Enter **Empl ID**. Use the 🔍 to search by name for the Empl ID. 3. Accept the default **CSU Contract Number "NEW"** (grayed out). This number is assigned by the system. See **Contract Description** (below) for contract number. 4. Enter the **Department** number, e.g. D40012, D40015, D40018, etc. 5. Click on the [Add] button.	**CSU Contract Data** [Find an Existing Value] [**Add a New Value**] *Empl ID: 100003471 🔍 CSU Contract Number: NEW *Department: D40013 🔍 [Add] Find an Existing Value | Add a New Value

Contract Status/Content Page Steps

Use the Contract Status/Content page to enter basic information about the coach appointment, including the beginning and ending dates, type of appointment, compensation, position number, term, WTUs and, for 10-month appointments, the two months of the year the coach will not be working.

- ℹ️ The **Contract Type** is used to define the type of appt (10-month, 12-month, or academic year).

- ℹ️ Once the contract is saved, you must be in **Correction Mode (**using 📝 Correct History to update or revise information on the **Contract Status/Content** pages.

- ℹ️ Detailed information about each field is provided in the **Field Definitions** section at the end of this Guide.

Navigation: CSU Temp Faculty → CSU Contract Data: Contract Status/Content tab

Processing Steps	Screen Shot
Contract Status Content: 1. Enter the **Effective Date** for the start of the temporary appointment. See the Contract Reminders document for contract dates. The **Effective Date** defaults to the current date. Override it by manually entering the correct date, if necessary. 2. Accept the **Effective Sequence** default of 0. 3. Enter the **Contract Description**. The format for the Coach **Contract Description** = ATHL 4-digit year Coach Initials. ➢ ATHL 0809 RAB ➢ ATHL 0809 DPT 4. Accept the default **Contract Status** of "Active". 5. Skip the **Entitlement** field. 6. Enter the **Contract Expected End Date** for this appt. 7. Accept the **Regulatory Region** default of "USA". 8. Skip the **Multi-Year End Date** field. 9. Enter the **Contract Type**. ➢ 001 for AY. ➢ 002 for 12-Month ➢ 012 for 10-Month *Note: we currently only have 12 month coaches on our campus* Click on 🔍 for a list of values. 10. Skip the **Approved by** boxes, our campus does not currently use them	

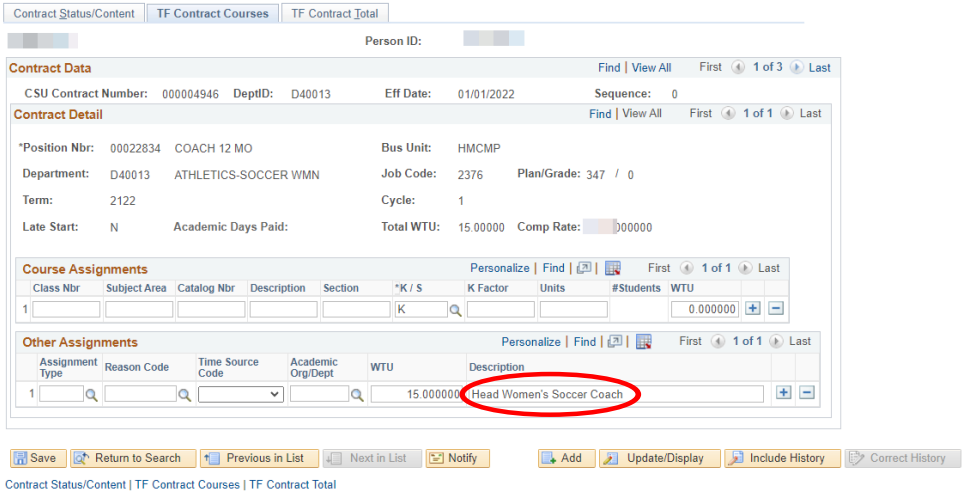| Processing Steps	Screen Shot
TF Contract Detail: 11. Enter the **Position Number**. This is the dept's specific position # for each coach position. The position # will automatically populate the Business Unit, Department, Job Code, and Sal Plan/Grade. 12. Accept the **Salary Grade** default of 0 for coaches. 13. Enter the **Term** for the contract. Term number = unique four digit code to designate year. 14. Accept the **Cycle** default of "1". 15. Enter the **Comp Rate =** Full time Salary Rate (Base Pay). The **Compensation Rate** will be multiplied by the time base fraction (derived from the total WTUs) to calculate the monthly salary rate. (The monthly salary rate will display on the **TF Contract Total** page.) 16. Accept the **Late Start?** Default of "**N**". See Field Definitions for appts that start after the beginning of the semester. 17. Leave the **Total WTU** value field as is. The **Total WTUs** will auto-calculate based on the workload and courses you enter on the TF Courses tab. 18. Enter months off in **Comments** field, if 10-month appointment. *Information entered in the Comments field will print on the transaction form.* Next: Click the **TF Contract Courses** tab at the top of the page.	Contract Status/Content / TF Contract Courses / TF Contract Total Person ID: **Contract Status/Content** View All 1 of 3 CSU Contract #: 000004946 DeptID: D40013 *Eff Date: 01/01/2022 Effective Sequence: 0 Contract Desc: ATHL 2122 GL *Contract Status: Active Entitlement: Term End Date: 12/31/2025 Reg Region: USA Multiple Term End Date: Contract Type: 002 12 Month Appointment Approved by: ☐ Approver1 ☐ Approver2 ☐ Approver3 **TF Contract Detail** Find	View All First 1 of 1 Last *Position Nbr: 00022834 COACH 12 MO Bus. Unit: HMCMP CPH Department: D40013 ATHLETICS-SOCCER WMN Job Code: 2376 Sal Plan/Grd: 347 / 0 Term: 2122 Cycle: 1 *Comp Rate: 000000 *Late Start? N Academic Days Paid: Total WTU: 15.00000 Comments: Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History Contract Status/Content	TF Contract Courses	TF Contract Total **TF Contract Detail** Find	View All First 1 of 1 Last *Position Nbr: 00022834 COACH 12 MO Bus. Unit: HMCMP CPH Department: D40013 ATHLETICS-SOCCER WMN Job Code: 2376 Sal Plan/Grd: 347 / 0 Term: 2122 Cycle: 1 *Comp Rate: 000000 *Late Start? N Academic Days Paid: Total WTU: 15.00000 Comments: Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History Contract Status/Content	TF Contract Courses	TF Contract Total

TF Contract Courses Page Steps

Use this page to enter the coach working title/assignment.

ⓘ The information listed at the top of this page is for display purposes only and comes from the information entered on the **Contract Status/Content** page.

Navigation: CSU Temp Faculty → CSU Contract Data: TF Contract Courses tab
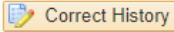
Processing Steps	Screen Shot
Course Assignments: Skip Course Assignments Section. **Other Assignments:** Under **Description**, enter the coach working title/assignment. Next: Click the **TF Contract Total Tab** on the top of the page.	

TF Contract Total Page Steps

Use this page to review all of the contract information entered and to prepare the record for printing the Coach Transaction Form. Contracts may be printed either in a "batch" as a group, or individually.

- ℹ️ The information listed at the top of this page is for display purposes only and is populated based on the information entered on the other pages in this contract.

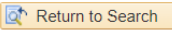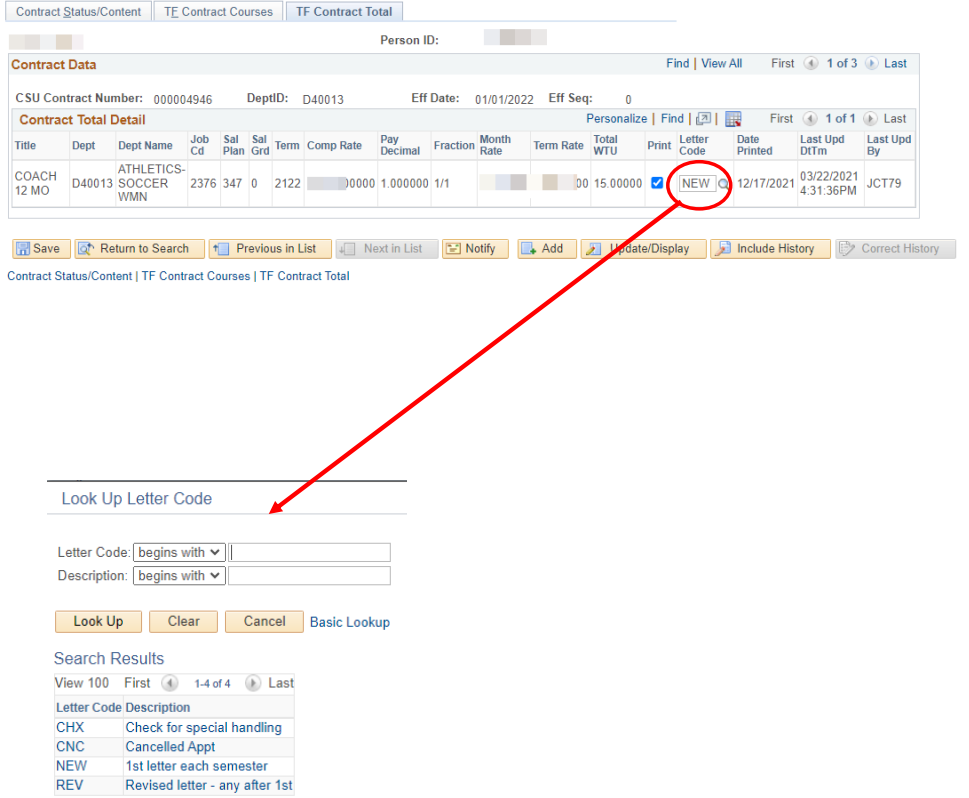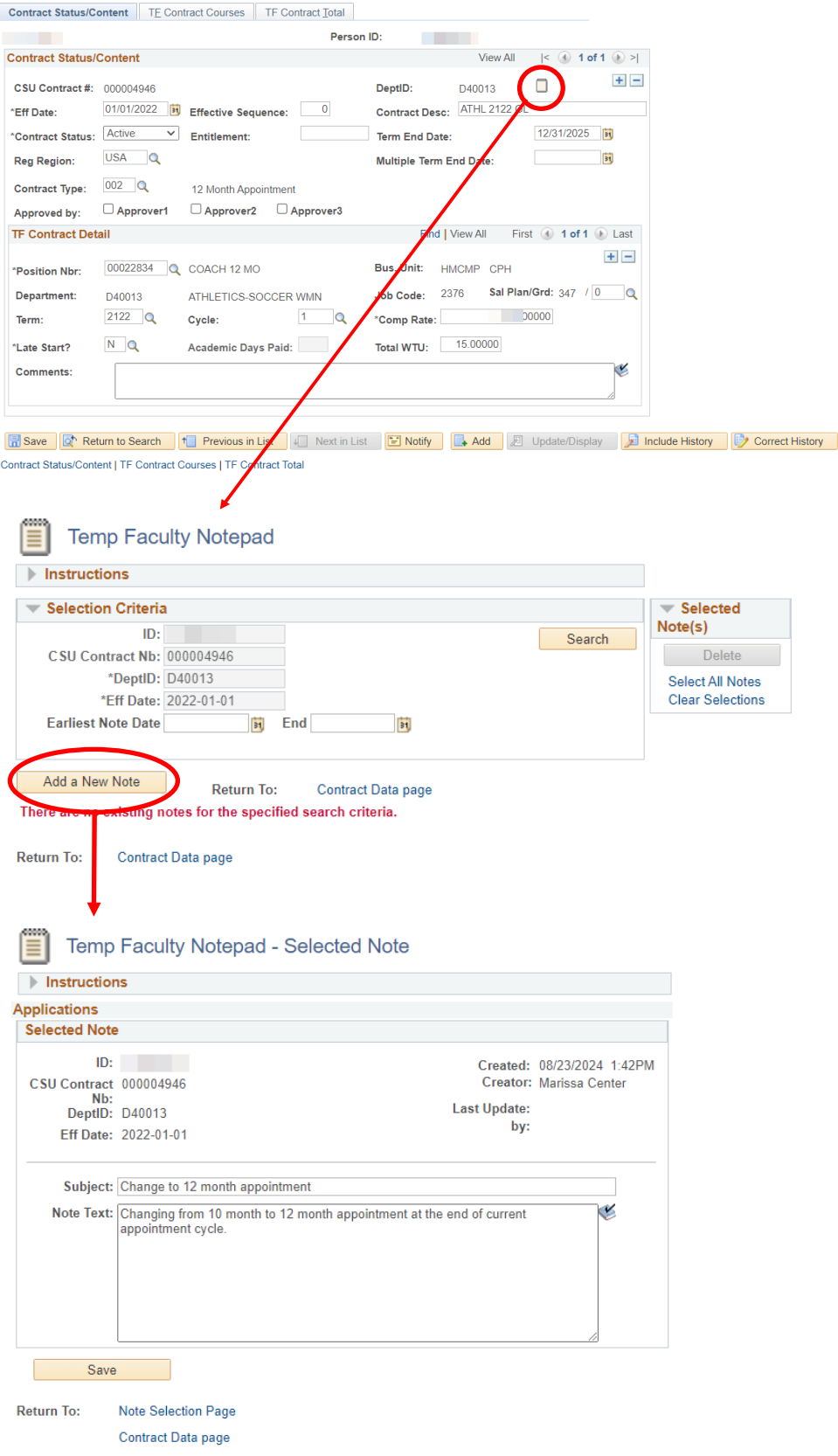**Navigation:** CSU Temp Faculty → CSU Contract Data: TF Contract Total tab

Processing Steps	Screen Shot
Upon review, if any data needs to be corrected, return to appropriate page and re-enter. 1. Accept the default for the **Print** flag. 2. Enter the **Letter Code**. The **Letter Code** is used to designate new (NEW), revised (REV), and cancelled (CNC) appointments. 3. Click the 🖫 Save button. Once the contract has been saved, any revisions must be done in **Correction Mode** using 📝 Correct History . 4. Click on Add ➕ Add to create other contracts, or on Return to Search 🔍 Return to Search to access the main Search page. 5. Print the contract using either Batch Print or Individual Print (see respective guides). Route for signature approval to the Athletic Director and the Office of the President, final copy to APS for Payroll processing.	 **Contract Status/Content** **TF Contract Courses** **TF Contract Total** Person ID: ▢▢▢ **Contract Data** Find | View All First ◀ 1 of 3 ▶ Last **CSU Contract Number:** 000004946 **DeptID:** D40013 **Eff Date:** 01/01/2022 **Eff Seq:** 0 **Contract Total Detail** Personalize | Find | 📄 | 🔢 First ◀ 1 of 1 ▶ Last Table headers: Title, Dept, Dept Name, Job Cd, Sal Plan, Sal Grd, Term, Comp Rate, Pay Decimal, Fraction, Month Rate, Term Rate, Total WTU, Print, Letter Code, Date Printed, Last Upd DtTm, Last Upd By COACH 12 MO, D40013, ATHLETICS-SOCCER WMN, 2376, 347, 0, 2122, ▢00000, 1.000000, 1/1, ▢, 00, 15.00000, ☑, **NEW** 🔍, 12/17/2021, 03/22/2021 4:31:36PM, JCT79 🖫 Save 🔍 Return to Search ⬆ Previous in List ⬇ Next in List 📧 Notify ➕ Add 📄 Update/Display 📄 Include History 📝 Correct History Contract Status/Content | TF Contract Courses | TF Contract Total **Look Up Letter Code** Letter Code: [begins with ▾] [_____] Description: [begins with ▾] [_____] [Look Up] [Clear] [Cancel] Basic Lookup **Search Results** View 100 First ◀ 1-4 of 4 ▶ Last | Letter Code	Description | |---|---|
CHX	Check for special handling
CNC	Cancelled Appt
NEW	1st letter each semester
REV	Revised letter - any after 1st	

Processing Steps	Screen Shot
Notepad Feature: After saving the contract, the Notepad icon will appear on the <u>Contract Status/Content</u> page. A brief note, information about the appt, may be entered here. The note will not be printed on the Coach Transaction Form. Each note contains the name of the creator, the date and the time the note was created. 6. Click on the 📝 icon. 7. Click on **Add a New Note** to open up note page. 8. Enter any notes about the appt. Any notes added here will not print on the contract, but will be available for Athletics or APS - notify APS of any notes added to the notepad. 9. Click 🖫 Save 10. Click on <u>Contract Data</u> page hyperlink to return to the contract. The notepad icon now displays "lines" indicating that a note has been added to this contract.	*Contract Status/Content* · TF Contract Courses · TF Contract Total Person ID: **Contract Status/Content** — View All — 1 of 1 CSU Contract #: 000004946 DeptID: D40013 *Eff Date: 01/01/2022 Effective Sequence: 0 Contract Desc: ATHL 2122 *Contract Status: Active Entitlement: Term End Date: 12/31/2025 Reg Region: USA Multiple Term End Date: Contract Type: 002 12 Month Appointment Approved by: ☐ Approver1 ☐ Approver2 ☐ Approver3 **TF Contract Detail** — Find	View All First 1 of 1 Last *Position Nbr: 00022834 COACH 12 MO Bus. Unit: HMCMP CPH Department: D40013 ATHLETICS-SOCCER WMN Job Code: 2376 Sal Plan/Grd: 347 / 0 Term: 2122 Cycle: 1 *Comp Rate: 00000 *Late Start? N Academic Days Paid: Total WTU: 15.00000 Comments: 🖫 Save 🔍 Return to Search ↑ Previous in List ↓ Next in List 📧 Notify ➕ Add 📄 Update/Display 📄 Include History 📄 Correct History Contract Status/Content	TF Contract Courses	TF Contract Total 📝 **Temp Faculty Notepad** ▶ Instructions ▼ Selection Criteria ID: [Search] CSU Contract Nb: 000004946 *DeptID: D40013 *Eff Date: 2022-01-01 Earliest Note Date End ▼ Selected Note(s) [Delete] Select All Notes Clear Selections [Add a New Note] Return To: Contract Data page There are no existing notes for the specified search criteria. Return To: Contract Data page 📝 **Temp Faculty Notepad - Selected Note** ▶ Instructions Applications Selected Note ID: Created: 08/23/2024 1:42PM CSU Contract Nb: 000004946 Creator: Marissa Center DeptID: D40013 Last Update by: Eff Date: 2022-01-01 Subject: Change to 12 month appointment Note Text: Changing from 10 month to 12 month appointment at the end of current appointment cycle. [Save] Return To: Note Selection Page Contract Data page

Tables of Valid Values

Contract Status/Content Page

Contract Status

Our campus uses the following 2 values:

Contract Status	Description
Active	This is the default value and should only be changed if an appt is cancelled.
Cancelled	This status is used when you cancel a contract that has already been processed.

Contract Type

Our campus currently only has 12 month coaches

Contract Type	Description
001	Academic Year Appointment
002	12-Month Appointment
012	10-Month Appointment

TF Contract Total Page

Letter Code

Code	Action	Description
NEW	New appt	1st contract for the academic year.
REV	Revised appt	Revised contract – any change after the 1st contract.
CNC	Cancelled appt	Cancelled appt – if the initial contract has been processed.

Field Definitions

Contract Status/Content Page

Field	Definition
Name	Name of the person. Automatically populates based on the Empl ID entered on the Add a New Value page.
Person ID	Same as Empl ID. For new hires, this is a unique employee identification number assigned by the system when they complete their onboarding.
Contract Number	The unique contract number, automatically assigned by the system when the contract is saved. (The Contract # will display as "NEW" until the contract is completed and saved.)
DeptID	The PeopleSoft department number – D4xxxx.
Notepad	Any brief 'notes' about the contract. Notes can only be added after the contract is saved. (The Notepad icon will not appear until the contract is completed and saved.) Use to add any special information about the contract and communicate it to APS.
Effective Date	The start date of the temporary appointment (when the contract becomes or became <u>effective</u>.)
Effective Sequence	The sequence number. Defaults to 0 for new appts. You will increment this number by '1' for every contract revision on the same effective date, e.g. decrease in time base that is effective from the beginning of the appointment would have an effective date the same as the original contract and a sequence number of '1'. The sequence number identifies this revision as a change to the appt. (Also see Revise Temporary Faculty Contract Guide for more info about the use of sequence numbers.)
Contract Desc	Contract description. The coach format is: "ATHL (in caps) Year (4 digits) Coach Initials". For example, a coach contract for Michael Alan Bradshaw would be: ATHL 0809 MAB.
Contract Status	Status of the contract. Defaults in as 'Active'. See Contract Status Values.
Entitlement	Ignore – not used for coaches.
Contract Expected End Date	The end date of the temporary appt for the current year.
Reg Region	The Regulatory Region – defaults as 'USA' – ignore.
Mult-Year End Date	Ignore – not used for coaches.
Contract Type	Identifies the type of appt. See Contract Type Values.
Approved by	Ignore – not used.
Position Number	The dept's specific coach position #'s. Contact APS if a new position # needs to be created.
Business Unit	Ignore – automatically populates when the position # is entered.
Department	Ignore – automatically populates when the position # is entered. (But, if it's not your dept #, you've probably entered the wrong position number! – check again.)
Job Code	Ignore – automatically populates when the position # is entered.
Salary Plan/Grade	Automatically populates when the position # is entered. This number should be 0 for all coaches.
Term	The term of the appointment.
Cycle	Ignore - defaults in as '1'.
Comp Rate	The coach full-time monthly salary rate. Whenever a row is added to the contract (because of a revision, for example) the comp rate will automatically update from the current rate in Job Data.
Late Start?	Defaults in as 'N' for None – starting at the beginning of the academic year. In special circumstances, this is used for an appt that begins after the start of the term. (e.g. maternity leave replacement). For these appts, select "L" for Late start.
Academic Days Paid	This field ungrays when the Late Start value is chosen in the Late Start field. Enter the number of academic days from the beginning date of the appt to the end of the semester for which the coach should be paid.
Total WTU	The total weighted teaching units of the appt. The system will calculate the pay decimal based on the WTUs entered here.
Comments	Free form text field used to identify two months off for 10-month coach appointments.

TF Contract Courses Page

Field	Definition
Other Assignments: Description	Description of the assignment – coach working title. Ignore all other fields on page – not used for coaches.

TF Contract Total Page

Field	Definition
Comp Rate	The coach full-time monthly salary rate.
Pay Decimal	FTEF. Calculates by dividing the total WTUs by 15. Used to compute Monthly Rate.
Fraction	Pay fraction. Calculates by dividing the total WTUs by 15. Used in the PIMS system to generate pay.
Total WTU	Populated from the assigned WTUs entered on the Contract Status/Content page.
Monthly Rate	Monthly salary. Calculated by multiplying the full-time monthly salary rate by the Pay Decimal.
Term Rate	Total pay for the appointment.
Letter Code	Identifies new, revised, or cancelled appointments.
Date Printed	The date the Contract is printed. Updates automatically every time the contract is printed.
Last Upd DtTm	The time the contract was last updated. Will not update if changes to the contract are made using Correct History.
Last Upd By	Identifies the last user who made a change to the Contract. Displays the userid and the date stamp.