Complete an AP101S - Summer Term 2024 in Adobe Sign

During Summer Term 2024, all appointment/assignment requests will be submitted through Adobe Sign. This will allow for an all-paperless process.

Summary of the process:
- College/department completes the AP101S - Summer Term 2024 form and routes for signatures
- Department head reviews documents, signs and routes to the college for review
- A designated person at the college level (i.e., HR business partner, associate dean, budget analyst) reviews the document, signs and routes to the dean
- Dean reviews document, signs and routes to Instructor
- Instructor reviews document, signs and routes to payroll imaging system
- Academic Personnel enters assignment into PeopleSoft referencing the imaged document, and sends pay request to Payroll for processing

Process Detail

The Adobe Sign AP101S - Summer Term 2024 PowerForm is accessed from the Academic Personnel Summer Term webpage.

Processing Steps

- Navigate to the Academic Personnel Summer Term webpage.
- Click on the AP101S - Summer Term 2024 form link
- Follow the instructions on the PowerForm

Screen Shot

AP101S - Summer Term 2024

This form should be used for Summer Term 2024 assignments (Job Codes 2358 and 2359). Please use only Cal Poly email addresses and enter the signers based on the following procedure:

1. Requester - Enter your email
2. Department Head/Chair - Enter email address
3. College Reviewer - Enter email address of the individual responsible for reviewing the appointment
4. Budget Analyst - (Optional) Enter email address of the individual responsible for reviewing the appointment
5. Dean - Enter email address
6. Academic Personnel Analyst
   CAED, CAFES, CENI: mhadley@calpoly.edu
   BCSM, COCB, Kabul: kabul@calpoly.edu
   CLA: lcolvin@calpoly.edu
7. Instructor - Enter email address
Establishing workflow - This step populates email addresses that will be used to send the form to the correct persons for signature.

Recipients
- The first Role, the Requestor, is the person completing the form.
  - Enter your email address
- The second Role is the department head/chair
  - Enter their email address
- The third Role is the college reviewer (determined by your college process)
  - Enter their email address
- The fourth Role is the budget analyst (this is optional)
  - Enter their email address
- The fifth Role is the dean
  - Enter their email address
- The sixth Role is the Academic Personnel analyst responsible for your college.
  - Enter their email address
- The seventh Role is the faculty member that is receiving the summer assignment.
  - Enter their email address

Fields
- Enter Name: Instructor’s Last Name-Dept

Submit
- Verify all required fields are entered correctly, click Submit.

You will receive a message of your success and notice that an email has been sent.
- The email sender is Academic Personnel Dept
- The subject is: Information Requested on “AP101S-Summer Term 2024 - Instructor Name-Department”
• Go to your email inbox and locate the email
• Click on the Review and fill out button
• You will be prompted for your portal login.

Processing Steps

• The form will open.

Screen Shot

• Complete the form.

TIPS:

• Summer Position #: Refer to Summer Term 2024 Position Numbers document on the AP Summer Term webpage. Pay attention to Jobcode 2358 or 2368 and Position Ldescr Instructional or Non-Instructional.

• Eligible to Teach: Refer to your college’s summer eligibility list on the AP Summer Term webpage.

• Attach Appropriate 107 Form: If assignment includes administrative time, assigned time, or other support time, please attach fully executed AP 107 Form.

• Total WTU: Refer to WTU Table linked within the form.

• Current Mo Base Rate: Refer to
PolyData Dashboards.

- **Total Term Salary** will calculate automatically.

- **PeopleSoft Data Entry** section (Comp Rate and Total WTU) will calculate automatically based on Employee Type, Total WTU, and Current Mo Base Rate fields.

- Verify that all required fields are entered correctly.

- Click blue Submit button at the bottom of the form.

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**Processing Steps**

**Screen Shot**

<table>
<thead>
<tr>
<th>Employee Type</th>
<th>Total WTU</th>
<th>Current Mo Base Rate</th>
<th>Total Term Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>AY Ten/TT or Dept. Chair</td>
<td>6</td>
<td>6000</td>
<td>50,000.00</td>
</tr>
<tr>
<td>AY Lecturer (Full-Time 2368)</td>
<td>2368</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AY Lecturer (Part-Time 2358)</td>
<td>2358</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PB Contract Date Entry</th>
<th>Comp Rate</th>
<th>Total WTU</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>660</td>
<td>50</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>60</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>60</td>
</tr>
</tbody>
</table>

AP101S Summer Term 2024 - TESTswift Music

AP101S State-Support 2024 SUMMER TERN APPOINTMENT AND ASSIGNMENT RECORD

**Employee Data**

- Full Name: Taylor Swift
- EmpID: 000033333
- Unit: Music-108300
- Primary Position: Tenure Track
- Salary Plan Code: Assoc.

**Work Assignment Action**

- AY Ten/TT or Dept. Chair
- AY Lecturer (Full-Time 2368)
- AY Lecturer (Part-Time 2358)

**Work (Teaching) Assignment and Pay**

- 1st 5 Week: 6/24/24 - 7/26/24
- 2nd 5 Week: 7/29/24 - 8/29/24
- 3rd 5 Week: 8/31/24 - 9/30/24
- 10 Week: 6/24/24 - 9/29/24
- AT Institutional: 8/25/24 - 9/29/24
- AT Non-Institutional: 8/25/24 - 9/29/24

**Approvals**

- Dept. Head/Chair: [Signature]
- College Reviewer: [Date]
- College Dean: [Date]
- Academic Personnel: [Date]

By signing below, I agree to the enclosed, the Consumer Disclosures and to utilize electronic signatures.

Submit
• You will have the option to view and/or download the form.
• At this point the form has been sent to the next person on the workflow that you established earlier in the process.
• You will need to refer to certain fields on the form in order to Create the Summer Term Contract (follow guide below).
Create a Summer Term Contract

**Prerequisite**

- Person must have an existing Empl ID in order to create a CSU Contract
- To locate the Empl ID use CSUID Search (go to CSUID Search BPG for details)
- The Empl ID can be copied and pasted in the New Contract Empl ID field when creating the new contract.
- If the person is not found via CSUID Search by using all search options, STOP. The Dean’s Office will enter the Contract Data.
- Summer Term contracts will always be separate from the regular academic year contracts in PeopleSoft.

**Process Detail**

The CSU Temporary Faculty Contract Data component is used to process contract data for various academic related employees. The data in the Faculty Contract is used for the hire/rehire process in Job Data

**PeopleSoft Navigation:** CSU Temp Faculty > CSU Contract Data

**Processing Steps**

- Click on the Add a New Value tab or Add a New Value hyperlink

  EmplID – Use one of the following methods to enter Emplid to prevent keying errors:
  1. Use the lookup to locate the Empl ID
  2. Use CSUID search results (copy and paste Emplid)
  3. Use Contract Search results (copy and paste Emplid).

- **CSU Contract Data:** Accept default- NEW
- **Department:** Click lookup to find the Dept ID.
- Click ‘Add’ button

The Contract Status/Content page displays.
Contract Status/Content Tab:
The Contract Status/Content page is used to record basic information about the CSU Contract, including the contract begin and end dates, contract type, comp rate, position number, term, WTU and any associated comments.

**Note:** Only one summer contract per year per department – Create a separate contract for each department. This page is effective dated. You can update the contract without being in Correction Mode anytime up until the effective date. Once the effective date of the contract has passed, you must be in Correction Mode to update information.

People Soft Navigation: CSU Temp Faculty > CSU Contract Data > Contract Status/Content

<table>
<thead>
<tr>
<th>Processing Steps</th>
<th>Screen Shot</th>
</tr>
</thead>
<tbody>
<tr>
<td>• CSU Contract #: Defaults to NEW. After entering data and saving the screen, the system will assign a number</td>
<td><img src="image1.png" alt="Screen Shot 1" /></td>
</tr>
<tr>
<td>• Effective Date: Defaults to today’s date. Enter the actual start date of the appt (6/24/2024 for all Summer 2024 sessions)</td>
<td><img src="image2.png" alt="Screen Shot 2" /></td>
</tr>
<tr>
<td>• Entitlement: Leave blank</td>
<td></td>
</tr>
<tr>
<td>• Contract Type: Enter 009</td>
<td><img src="image3.png" alt="Screen Shot 3" /></td>
</tr>
<tr>
<td>• Approved by: Optional</td>
<td></td>
</tr>
<tr>
<td>• Contract Description: Enter as “(4 Digit Summer Term) – Dept Name” Example: 2246 – Music For consistency, attempt to key your contract name using upper/lower case characters</td>
<td><img src="image4.png" alt="Screen Shot 4" /></td>
</tr>
<tr>
<td>• Term End Date: End date of the term, this date is required (9/6/2024 for all Summer 2024 sessions)</td>
<td><img src="image5.png" alt="Screen Shot 5" /></td>
</tr>
<tr>
<td>• Multiple Term End Date: Leave Blank</td>
<td></td>
</tr>
<tr>
<td>• Position Number: Enter the Summer Term position number provided by Academic Personnel (corresponds with job code 2358 or 2368 and Instructional or Non-Instructional)</td>
<td><img src="image6.png" alt="Screen Shot 6" /></td>
</tr>
<tr>
<td>• Term: Select 4-digit term for Summer Term from lookup</td>
<td></td>
</tr>
<tr>
<td>• Sal Plan/Grade: Verify Grade(Rank) reflects current primary position rank.</td>
<td><img src="image7.png" alt="Screen Shot 7" /></td>
</tr>
<tr>
<td>• Comp Rate: Enter Summer Term Monthly Base Rate from AP 101S PeopleSoft Entry section</td>
<td><img src="image8.png" alt="Screen Shot 8" /></td>
</tr>
<tr>
<td>• Total WTU: Enter Summer Term Monthly Base Rate from AP 101S PeopleSoft Entry section</td>
<td></td>
</tr>
<tr>
<td>• Comments: For college/dept use to record comments</td>
<td><img src="image9.png" alt="Screen Shot 9" /></td>
</tr>
<tr>
<td>• Click ‘Save’ button</td>
<td><img src="image10.png" alt="Screen Shot 10" /></td>
</tr>
</tbody>
</table>
**TF Contract Total Tab:**

Use this page to review all of the contract information entered.
- Information listed on this page is for display purposes only and is populated based on the information entered on Contract Status/Content Page.

**PeopleSoft Navigation:**  CSU Temp Faculty > CSU Contract Data > TF Contract Total tab

<table>
<thead>
<tr>
<th>Processing Steps</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• Review for accuracy, then click ‘Save’ button</td>
<td><img src="image" alt="Screen Shot" /></td>
</tr>
<tr>
<td>• Letter Code: This is not used</td>
<td></td>
</tr>
</tbody>
</table>
