Complete an AP101S - Summer Term 2023 in Adobe Sign

During Summer Term 2023, 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 2023 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

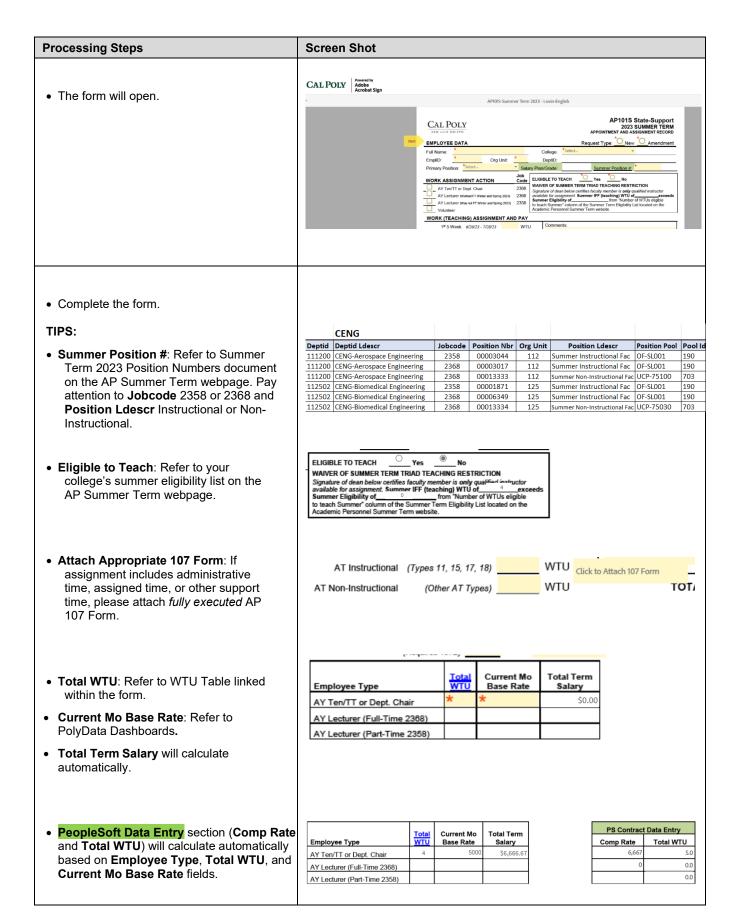
Process Detail

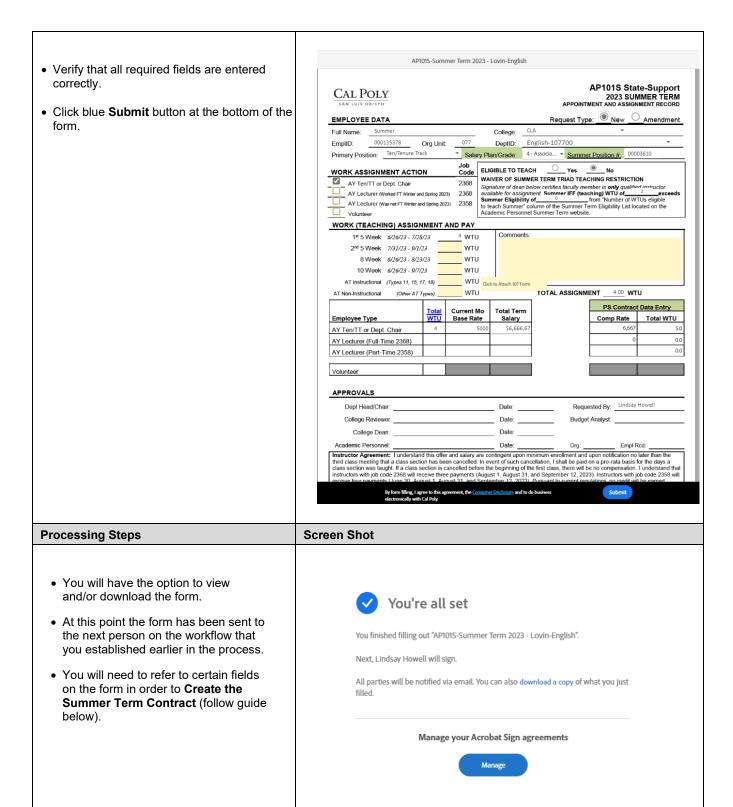
The Adobe Sign AP101S - Summer Term 2023 PowerForm is accessed from the Academic Personnel Summer Term webpage.

Processing Steps Screen Shot									
Navigate to the Academic Personnel Summer Term webpage.	AP101S - Summer Term 2023								
 Click on the AP101S - Summer Term 2023 form link Follow the instructions on the PowerForm 	This form should be used for Summer Term 2023 assignments (Job Codes 2358 and 2368). 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								
	Recipients Requester* Enter Recipient's Email Department Head/Chair* Enter Recipient's Email College Reviewer* Enter Recipient's Email								

Screen Shot Processing Steps Establishing workflow - This step populates email addresses that will be used to send the form to the correct persons for Recipients signature. Requester* Recipients Enter Recipient's Email • The first Role, the Requestor, is the person Department Head/Chair* completing the form. o Enter your email address Enter Recipient's Email • The second Role is the College Reviewer* department head/chair o Enter their email address Enter Recipient's Email • The third Role is the college reviewer Budget Analyst (Optional) (determined by your college process) Enter Recipient's Email o Enter their email address Dean/Division Head* • The fourth Role is the budget analyst (this is optional) Enter Recipient's Email o Enter their email address Instructor* • The fifth Role is the dean o Enter their email address Enter Recipient's Email • The sixth Role is the faculty member that is receiving the summer assignment. Fields o Enter their email address **Fields** Enter Last Name-Dept (Example: Smith-Philosophy) * o Enter Name: Instructor's Last Name-Dept · Verify all required fields are entered correctly, click Submit. Submit • You will receive a message of your success and notice that an email has been sent. AP101S - Summer Term 2023 • The email sender is Academic Personnel Dept The agreement has been submitted successfully. The first recipient should receive an email shortly with a link to the agreement. • The subject is: Information Requested on "AP101S-Summer Term 2023 -Instructor Name-Department" • Go to your email inbox and locate the email Powered Adobe CAL POLY • Click on the Review and fill out button • You will be prompted for your portal login. academicpersonnel@calpoly.edu Academic Personnel requests your information on AP101S-Summer Term 2023 - Lovin-English Review and fill out

This form should be used for Summer Term 2023 assignments.





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	Eind an Existing Value Add a New Value						
Click on the Add a New Value tab or Add a New Value hyperlink EmpIID – Use one of the following methods to enter Emplid to prevent keying errors: 1. Use the lookup to locate the Empl ID							
Use CSUID search results (copy and paste Emplid) Use Contract Search results (copy and paste Emplid).	Empl ID: 000055555 Q CSU Contract Number: NEW Department: 107700 Q						
CSU Contract Data: Accept default- NEW	Add						
 Department: Click lookup to find the Dept ID. Click 'Add' button The Contract Status/Content page displays. 	Find an Existing Value Add a New Value						

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

Processing Steps	Screen Shot										
CSU Contract #: Defaults to NEW.	Contract Status/Content										
After entering data and saving the screen, the system will assign a number	CSU Contract #: NEW										
Effective Date: Defaults to today's	*Eff Date: 06/26/2023 Effective Sequence: 0										
date. Enter the actual start date of the appt (6/26/2023 for all Summer 2023	*Contract Status: Active • Entitlement:										
sessions)	Reg Region: USA Q										
Entitlement: Leave blank	Contract Type: 009										
Contract Type: Enter 009	Approved by: Approver1 Approver2 Approver3										
Approved by: Optional											
Contract Description: Enter as "(4 Digit Summer Term) – Dept Name"	DeptID: 107700										
Example: 2236 – English For consistency, attempt to key your	Contract Desc: 2236 - English Torm End Date: 09/07/2023										
contract name using upper/lower case characters	Term End Date.										
Term End Date: End date of the term,	Multiple Term End Date:										
this date is required (9/7/2023 for all Summer 2023 sessions)	TF Contract Detail										
Multiple Term End Date: Leave Blank	00000004										
Position Number: Enter the Summer	*Position Nbr: 00003024 Q Summer Instructional Fac										
Term position number provided by Academic Personnel (corresponds with	Department: 107700										
job code 2358 or 2368 and Instructional or Non-Instructional)	*Late Start? N Q Academic Days Paid:										
Term: Select 4-digit term for Summer Term from lookup	Late Start: Academic Days Paid.										
·	PS Contract Data Entry										
Sal Plan/Grade: Verify Grade(Rank) reflects current primary position rank.	Comp Rate Total WTU										
Comp Rate: Enter Summer Term	6,667 5.0 0 0.0										
Monthly Base Rate from AP 101S PeopleSoft Entry section	0.0										
Total WTU: Enter Summer Term Monthly Base Rate from AP 101S PeopleSoft Entry section	Bus. Unit: SLCMP SLO										
·	Job Code: 2368 Sal Plan/Grd: 342 / 4 Q										
Comments: For college/dept use to record comments	*Comp Rate: 6667.000000										
Click 'Save' button	Total WTU: 5.00000										

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

Processing Steps	Screen Shot																	
Review for accuracy, then click	Contract Data Find View All First & 1 of 1 & Last																	
'Save' button										Seq: 0 Personalize Find 🗗 🚃 First 🕟 1 of 1					of 1 D Last			
Letter Code: This is not used	Title Summer	Dept			Sal Plan	Sal Grd Te	erm C	Comp Rate	Pay Decimal	Fraction	Month Rate	Term Rate	Total WTU	Print	Letter Code	Date Printed		Last Upd By
	Instructional Fac	107700	CLA- English	2368	342	4 2	236 6	667.000000	0.333333	1/3	2222.330	8889.320	5.00000	~	Q		04/20/2023 1:14:49PM	