

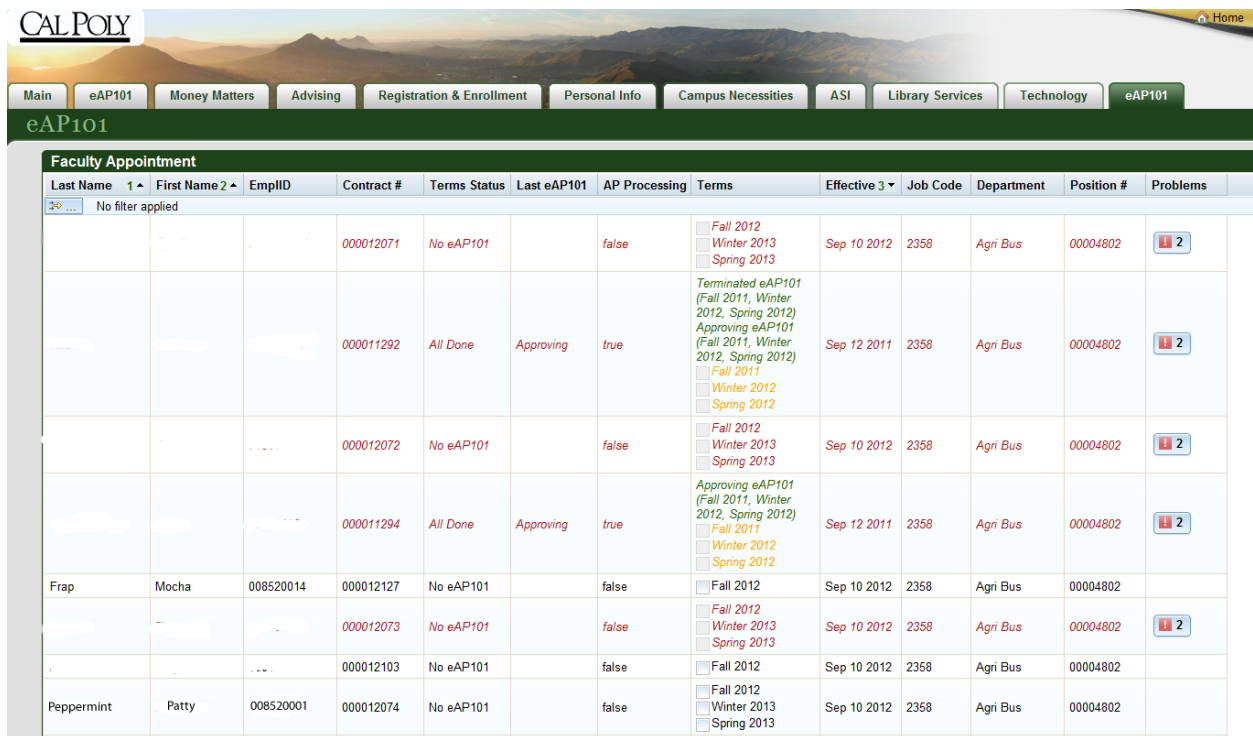
# Creating an eAP101

DO NOT USE INTERNET EXPLORER BROWSER FOR THE eAP101 PROCESS – Supported browsers include Firefox, Chrome and Safari.

NOTE: This process can only be completed after a contract has been entered into PeopleSoft and the overnight refresh has occurred. Please refer to the appropriate BPG linked below for instructions on how to create contracts.

[Create a New AY Contract and Add Terms \(pdf\)](#) or [New Terms for Existing Contract \(pdf\)](#)

1. Log into your portal and click on eAP101 tab. (please refer to FAQ's in the portal on how to add content if you do not see the eAP101 tab)




The screenshot shows the eAP101 portal interface. At the top is the CAL POLY logo and a navigation bar with tabs: Main, eAP101, Money Matters, Advising, Registration & Enrollment, Personal Info, Campus Necessities, ASI, Library Services, Technology, and eAP101. Below the navigation bar is a table titled "Faculty Appointment". The table has columns: Last Name, First Name, EmplID, Contract #, Terms Status, Last eAP101, AP Processing, Terms, Effective, Job Code, Department, Position #, and Problems. The table contains several rows of data, including appointments for Frap Mocha and Peppermint Patty. Some rows are highlighted in black, green, yellow, or red, indicating their status. A red icon with the number 3 is visible in the Problems column for some rows.

Last Name	First Name	EmplID	Contract #	Terms Status	Last eAP101	AP Processing	Terms	Effective	Job Code	Department	Position #	Problems
			000012071	No eAP101		false	Fall 2012 Winter 2013 Spring 2013	Sep 10 2012	2358	Agri Bus	00004802	2
			000011292	All Done	Approving	true	Terminated eAP101 (Fall 2011, Winter 2012, Spring 2012) Approving eAP101 (Fall 2011, Winter 2012, Spring 2012) Fall 2011 Winter 2012 Spring 2012	Sep 12 2011	2358	Agri Bus	00004802	2
			000012072	No eAP101		false	Fall 2012 Winter 2013 Spring 2013	Sep 10 2012	2358	Agri Bus	00004802	2
			000011294	All Done	Approving	true	Approving eAP101 (Fall 2011, Winter 2012, Spring 2012) Fall 2011 Winter 2012 Spring 2012	Sep 12 2011	2358	Agri Bus	00004802	2
Frap	Mocha	008520014	000012127	No eAP101		false	Fall 2012	Sep 10 2012	2358	Agri Bus	00004802	
			000012073	No eAP101		false	Fall 2012 Winter 2013 Spring 2013	Sep 10 2012	2358	Agri Bus	00004802	2
			000012103	No eAP101		false	Fall 2012	Sep 10 2012	2358	Agri Bus	00004802	
Peppermint	Patty	008520001	000012074	No eAP101		false	Fall 2012 Winter 2013 Spring 2013	Sep 10 2012	2358	Agri Bus	00004802	

Contracts listed in black are ready for an eAP101 to be initiated.

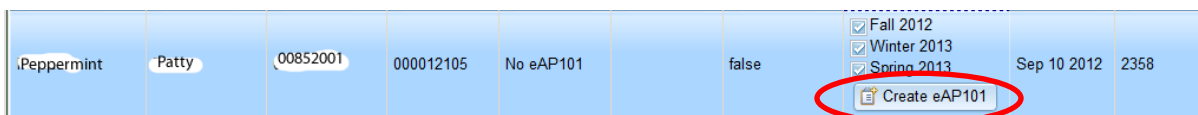
Contracts listed in green have been submitted and can only be viewed.

Contracts listed in Yellow are currently in process and cannot be altered.

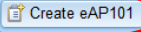
Contracts listed in red have issues. See problem details by clicking the  icon in the last column.

**IF YOU DO NOT SEE THE CONTRACT YOU ENTERED, PLEASE VERIFY YOU USED THE CORRECT TERM CODE IN CONTRACT DATA.** Note: Term codes beginning with 6 will not be available through this process.

2. Find the employee to create an eAP101 and choose the correct terms. Once you have checked the terms for this appointment, click the create eAP101 button.



This is a close-up of the table row for Peppermint Patty. The row is highlighted in blue. The 'Terms' column shows checkboxes for Fall 2012, Winter 2013, and Spring 2013, all of which are checked. The 'Effective' date is Sep 10 2012 and the 'Job Code' is 2358. The 'Create eAP101' button is circled in red.

Peppermint	Patty	008520001	000012105	No eAP101		false	<input checked="" type="checkbox"/> Fall 2012 <input checked="" type="checkbox"/> Winter 2013 <input checked="" type="checkbox"/> Spring 2013	Sep 10 2012	2358			
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# Creating an eAP101

3. The eAP101 for the employee will be generated in a new tab entitled “Academic Appointment and Assignment Record (eAP101)”. Please verify the information in the EMPLOYEE INFORMATION section.

## Academic Appointment and Assignment Record (eAP101)

### Academic Appointment and Assignment Record (eAP101)

#### EMPLOYEE INFORMATION

<i>Employee ID:</i> 008520001	<i>Last name:</i> Peppermint	<i>First name:</i> Patty	<i>Primary Prefix:</i> Dr.
<i>Dept ID:</i> 100300	<i>Department:</i> CAFES-Agribusiness	<i>Org Unit (paycheck delivery):</i> 003	<i>Employee Record:</i> 0
<i>Contract Type:</i> 12.12 Entitlement – Yr 1 of 3	<i>Contract Type Code:</i> 014	<i>Contract Number:</i> 000012128	<i>Employee Username:</i>
<i>Entitlement WTUs:</i> 40	<i>Assignment End Date</i> June 13, 2015	<i>College</i> College of Agriculture, Food and Environmental Sciences	

#### ASSIGNMENT

4. Check the appropriate boxes under the assignment section only if they apply to appointment.

Note: Not all assignments will have information checked in this section

#### ASSIGNMENT

*There are subsequent term(s)/academic year(s) for this assignment*

☐ Use if you will be assigning other terms at a later date.

*Extension of current full time lecturer position for second year*

☐

*Full-Time for Academic Year*

☐

*New Hire for College*

☐ PAF to be sent to Academic Personnel. Offer letter will be printed out and sent to employee.

# Creating an eAP101

5. Verify that the quarters you are assigning have the correct information.

## FALL WORK ASSIGNMENT AND PAY

### FALL

<i>Job Code:</i> 2358	<i>Job Code Description:</i> Lecturer AY	<i>Position #:</i> 00004802
<i>Eff Date:</i> September 10, 2012	<i>Contract Term End Date:</i> December 8, 2012	<i>Late Start</i> N
<i>Term:</i> 2128-FALL 2012	<i>Term Code:</i> 2128	
<i>Rank/Range:</i> B	<i>Range Code:</i> 3	
<i>Base Monthly:</i> 5,000	<i>Monthly Salary:</i> 4,666.670	<i>Total Salary for Term:</i> 18,666.680
<i>WTUs:</i> 14.000	<i>Work FTE:</i> 0.933	<i>Fraction:</i> 14/15
<i>Work WTUs Differ from Pay WTUs:</i> <input type="checkbox"/>		

## WINTER WORK ASSIGNMENT AND PAY

### WINTER

<i>Job Code:</i> 2358	<i>Job Code Description:</i> Lecturer AY	<i>Position #:</i> 00004802
<i>Eff Date:</i> January 7, 2013	<i>Contract Term End Date:</i> March 25, 2013	<i>Late Start</i> N
<i>Term:</i> 2132-WINTER 2013	<i>Term Code:</i> 2132	
<i>Rank/Range:</i> B	<i>Range Code:</i> 3	
<i>Base Monthly:</i> 5,000	<i>Monthly Salary:</i> 4,000.000	<i>Total Salary for Term:</i> 16,000.000
<i>WTUs:</i> 12.000	<i>Work FTE:</i> 0.800	<i>Fraction:</i> 4/5
<i>Work WTUs Differ from Pay WTUs:</i> <input type="checkbox"/>		

## SPRING WORK ASSIGNMENT AND PAY

### SPRING

<i>Job Code:</i> 2358	<i>Job Code Description:</i> Lecturer AY	<i>Position #:</i> 00004802
<i>Eff Date:</i> April 2, 2013	<i>Contract Term End Date:</i> June 15, 2013	<i>Late Start</i> N
<i>Term:</i> 2134-SPRING 2013	<i>Term Code:</i> 2134	
<i>Rank/Range:</i> B	<i>Range Code:</i> 3	
<i>Base Monthly:</i> 5,000	<i>Monthly Salary:</i> 4,000.000	<i>Total Salary for Term:</i> 16,000.000
<i>WTUs:</i> 12.000	<i>Work FTE:</i> 0.800	<i>Fraction:</i> 4/5
<i>Work WTUs Differ from Pay WTUs:</i> <input type="checkbox"/>		

## 6. Fill in the appropriate assignment/letter requirements.

### Recent Information from Job Data

*Effective Date:*  
September 12, 2011

*Rank:*  
5-D

*Range Code:*  
5

*End Date:*  
June 9, 2012

*Base Monthly:*  
7155

*Job Code:*  
2358

*Difference in Base Monthly Salary*  
0.000

This section will only appear if the employee has a row in Job Data with the same position number. This information is the most current information for the employee in that position.

### Salary Justification

*Above SSI Max*  
☒

*Justification Required*

This section only appears if there is a change in base salary. Only use if appointment is for a new employee appointed above SSI max or when a new salary is being given. Please see [Faculty Salaries at a Glance](#) to verify. A justification is required for all increases to base salary.

### Check if any of these apply

*I-9 Required*  
☐

*Last I-9 Date*  
No I-9 on file

New employees, employees with a break in service longer than a year <or> employees with any break and an I9 date before 8/1/2009 will be required to complete a new I9.

*Visa Contingency*  
☒

*Visa Type*  
H1B

*Transcript Contingency*  
☒

*Transcript Deadline*  
October 8, 2012

If hired within 4 weeks of the start of the quarter unofficial transcripts will need to be provided with the PAF to AP at the time of appointment.

*Rehired Annuitant*  
☒

*Maximum WTUs*

*First Rehire after Retirement or Rehired after break in service > 1 Year*

☐

*Other concurrent Cal Poly employment*  
☒

*Job Code*

*If necessary, enter multiple job codes separated by commas*

*Time Base*

*If necessary, enter multiple time bases separated by commas*

Note: If other position is non-exempt and total hours > full time HR101S is required

*Dept*

*If necessary, enter multiple depts separated by commas*

*Exempt*

☐

*Non-exempt*

☐

### Appointment Basis and Funding

*Appointment Basis*

*Requisition No:*

*Please enter a requisition number*

Other types of appointment basis include:

Teaching Associates

Emergency Hires – requires a justification

N/A – Used for 12.12 entitled lecturers

*Funding Source*

### Justification for Personnel Action

*Please describe why this recruitment or personnel action is essential to the educational mission of the University*

# Creating an eAP101


7. Once you have completed filling out the eAP101 you can review and then send or immediately send the form to the next level of approval.

▼ **eAP101 Initiated by**

<i>First Name</i> Susanne	<i>Last Name</i> Brownlee	<i>Date</i> August 13, 2012
<i>Title</i> Admin Support Coord 12 Mo	<i>Dept</i> CAFES-Agribusiness	<i>Level (CSS Hidden)</i> COORDINATOR

▼ **Approval Chain Preview**

<i>Department Coordinator (CSS hidden)</i> Agribusiness Department Coordinator	
<i>Department Chair</i> Agribusiness Department Chair	jnoel
<i>Analyst</i> CAFES Analyst	lhensley
<i>Dean</i> Dean of CAFES	dwehner
<i>Provost</i> Provost	kenzfink, sbong, dmanker, asaddi
<i>Academic Personnel</i> Academic Personnel	schansny, sbong, awhite, aliddico, cjohnson, jmyers, csammons, dmanker, lseret, dkraker


⚠️  Close Review Send

8. If you have any errors in the eAP101 a notice appears at the bottom of the form.

**Your Form Contains the Following Errors**

1. [Funding Source](#) - Funding source required.
2. [Please describe why this recruitment or personnel action is essential to the educational mission of the University](#) - Please select a justification for personnel action.


Document not saved: please check for errors in your form before saving again.


⚠️  Close Review Send


9. One you have submitted the eAP101 successfully you will get the following message.


**Successfully submitted Faculty Appointment**

Created new workflow process with id **5707**.

 [Review Form](#)

 [Download PDF](#)

 [Return to the Workflow Dashboard](#) To go to eforms

 [Logout of Workflow](#)

To create another eAP101 go back to the “My Cal Poly Portal” tab in your browser

# Creating an eAP101

10. At any time you can log into <https://eforms.calpoly.edu> and enter the process id or search by the employee to see the status of your request.

## OPTION 1 - Search by Process ID

Go to the Lookup Process tab and use the Process ID you were given when you submitted your request. Make sure to select the Faculty Appointment workflow.

### CalPoly eForms (Testing)

Worklist My Requests My Assignments **Lookup Process** All Processes

Faculty Appointment 5707 Lookup

## OPTION 2 – Search by Name, Empl Id or other Variable

Go to the My Requests tab choose Faculty Appointment. You will want to add a filter to narrow your search. In this example the search is performed by last name.

### CalPoly eForms (Testing)

Worklist **My Requests** My Assignments Lookup Process All Processes

**Add Filter** Faculty Appointment Employee's Last Name is Peppermint Update

ID	? Name	Requester	Created	Completed
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Sorry, an