

INSTRUCTIONS FOR EMPLOYMENT AND EMPLOYEE CHANGES PERSONNEL TRANSACTION REPORTS

All changes in employment status must be processed using a completed PTR, changes include when employee's change in job classification, salary rate, job status or termination. **This form must be received by Human Resources Department - University Enterprises Corporation at CSUSB ("UEC") 4 DAYS PRIOR to the anticipated start date through Adobe Workflow.**

EMPLOYEE LEGAL NAME AND CONTACT: Enter employee's legal name (last name, first name, middle initial,) and contact information. **If Employee is currently a CSUSB Faculty member or State Staff employee, you must complete the CSUSB FACULTY & STAFF OVERLOAD Personnel Transaction Report instead of this PTR.**

ANTICIPATED START DATE: Enter as follows: *New Hires/Rehire* - first day employee is scheduled to work or return to work, *Reappointment* – first day of new budget period, *Change* – date change is to occur.

ACTION TYPE: *New Hire/Rehire* = new employee for your department or former employee of your department that will begin working for you again, *Reappointment* = Department is retaining employee into new contract period. Note those that require HR approval. If leave of absence, **Attach the approved leave of absence form.**

EMPLOYEE CLASSIFICATION: Check only one. UEC Human Resources must approve all MP, Staff Exempt and Temporary Classifications. Only CSUSB Students can have CSUSB student status. Contact SPA HR Specialist for appropriate classification designation.

FUNDING SOURCE: MUST enter all four current funding source numbers Account # / Fund# / Department # / Project # (23 alpha-numeric digits total). If there is a change in funding source, BE SURE TO SPECIFY WHAT PROJECT IS BEING ADDED AND/OR DELETED. Distribution percentage must be identified

RATE CHANGE REASON: Please check one if a change in pay rate is requested.

PAY RATE: List employee's monthly or hourly pay rate. If a change is being made to the pay rate, enter the current rate. If the employee works 40 hours per week, please enter the monthly rate.

% RATE DIFF: If the change is to the pay rate, enter the percentage difference from the current rate to the proposed rate.

PROPOSED NEW PAY RATE: If the change is to the pay rate, list the new proposed rate of pay.

OF HOURS PER WEEK: List the number of hours per week that the employee is scheduled to work. If hours vary, please indicate a range.

UEC JOB TITLE: Print the employee's working UEC job title.

POSITION CHANGE REASON: Please check one. These must change must be pre-approved by HR. Be sure to give us a call to discuss.

WORK LOCATION: Check one. If off-campus, indicate your work location on the comment section. Remote work is temporarily unavailable. Should you have a project need, please be sure to contact HR.

THIS POSITION: Check one. This indicates to Human Resources if additional information is required for this position.

COMMENTS: Use this space to inform the Human Resources of special instructions or information.

DIRECTOR/PI: Please print the name, email address and phone number/extension of the department for the Principal Investigator/Project Director

PRIMARY CONTACT: If the project/department has a specific contact person (such as an Administrative Assistant) for Human Resources to use as a primary contact, enter their name, email address and phone number/extension.

SIGNATURES: The following signatures are required: Authorized Signer for the Account (authorized signers cannot sign for their own employment transactions, instead this line should be signed by their direct supervisor) and Budget Approval.

PTR Link: [Sponsored Programs- Employee and Employment Changes PTR](#)

Adobe Workflow Recipients:

Submitter: Individual completing the PTR. If you are submitting the PTR and the PI of the project, please use this PTR

[HR - Sponsored Programs PTR Employee/ Employment Changes Submitted by PI](#)

PI/PD: Principal Investigator/ Project Director/ Authorized Signer

SPA HR: Ingrid Valdez (ivaldez@csusb.edu)

Budget RA: Research Analyst (Julie Wessel, Yolanda Meyer, Walid Wahba) spn_pgm_fdn@csusb.edu

UEC-HR: uec-hr@csusb.edu

CC'd: Siska Purnawan or uec-payroll@csusb.edu

Document Name *

Employee/Employment PTR SPA - Fund/Project- Employee's Last Name

Please add the FUND/ PROJECT and Employee's Last Name to the "Document Name"

For Example: Employee/Employment PTR SPA- SXXX/LLXXXX- Smith

Click on Send. This will open the PTR, so you are able to complete it.

If you have any questions regarding this form, please contact the Sponsored Programs HR Specialist at ivaldez@csusb.edu or 909-537-3069.