

INSTRUCTIONS FOR SEPARATION PERSONNEL TRANSACTION REPORTS

*All changes in employment status must be completed in every case where there is an employee change in job classification, salary rate, job status or termination. **This form must be received by Human Resources - University Enterprises Corporation at CSUSB ("UEC") Department 4 DAYS PRIOR to the effective date.***

EMPLOYEE LEGAL NAME: Enter employee's legal name (last name, first name, middle initial,). *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.*

DATE OF SEPARATION: Enter date separation is to occur.

LAST DAY WORKED: If known, enter the date the employee last worked. This may be different from the date of separation.

REASON FOR SEPARATION: Check one and indicate if the employee is eligible for rehire with your department. Attach any applicable documentation to the PTR (i.e. resignation letter).

COMMENTS: Use this space for any additional information HR may need as to the reason for the separation.

EMPLOYEE CLASSIFICATION: Check only one.

FUNDING SOURCE: MUST enter all four current funding source numbers Account # / Fund# / Department # / Project # (23 alpha-numeric digits total).

DISTRIBUTION %: Indicate what percentage of time should be attributed to that funding source.

PAY RATE: List employee's monthly or hourly pay rate.

OF HOURS PER WEEK: List the number of hours per week that the employee was scheduled to work.

WORK LOCATION: Check one. If off-campus, enter location on comments.

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

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

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

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 a UEC Human Resources Representative.

PTR Link: Separation PTR

Adobe Workflow Recipients:

Submitter: Individual completing the PTR. If you are submitting the PTR and the PI of the project, please remember to sign the form.

PI/PD: Principal Investigator/ Project Director/ Authorized Signer. **If you are the PI and completed this PTR, do not include an email address here.**

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

UEC-Payroll: Payroll Technician (Siska Purnawan or Vanessa Rolland) uec-payroll@csusb.edu

UEC-HR: uec-hr@csusb.edu

CC'd: Sponsored Programs – Spon_pgm_fdn@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: Separation 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.