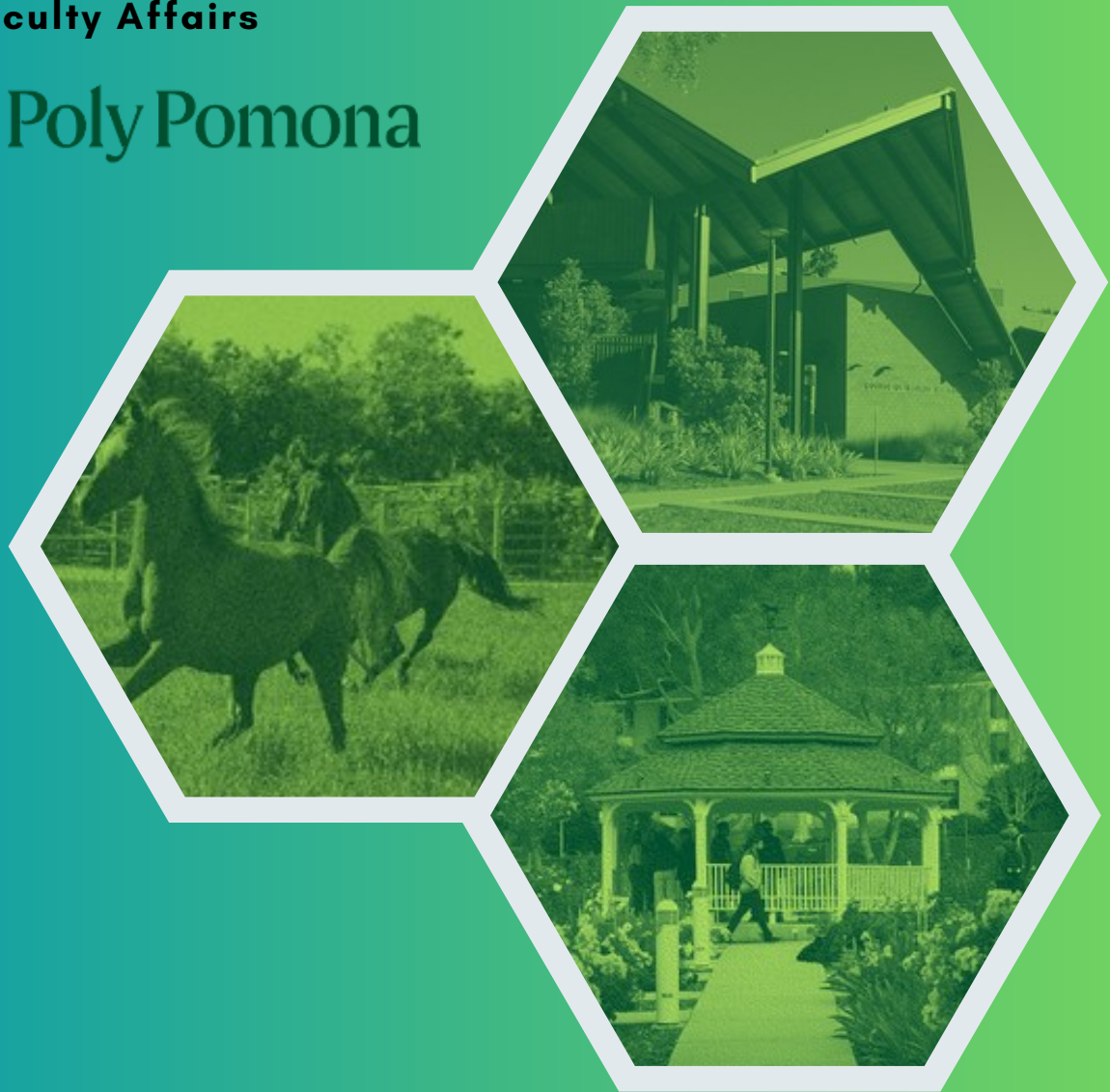


Faculty Affairs



Cal Poly Pomona



# **TAE User Guide For Approving Lecturer Appointments**

Updated 3/27/26

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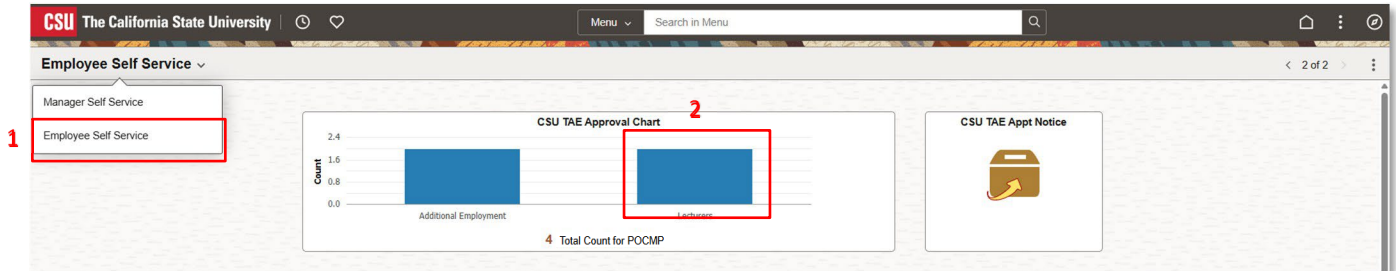
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## *Contact*

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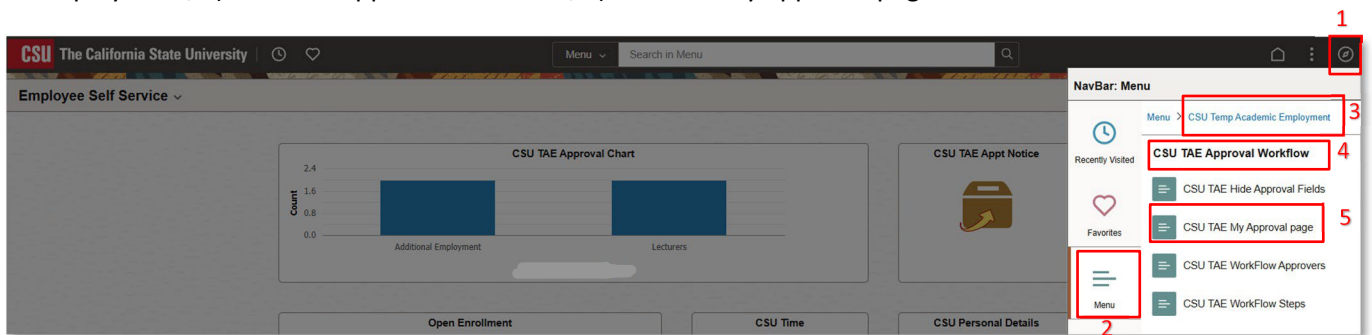
## Search for appointments to approve

**Step 1:** Log into CHRS and then select “Employee Self Service” from the drop-down menu to see if you have “Lecturer” appointments pending approval.



**Step 2:** Follow the steps to navigate to the approval page by following these steps:

1) Click the compass icon (NavBar) in the upper-right corner, 2) Menu, 3) CSU Temp Academic Employment, 4) CSU TAE Approval Workflow, 5) CSU TAE My approval page



**Step 3:** Enter the search criteria noted below to find the pending approvals, then click “Search.”

**Business Unit (POCMP)** and **EE (Employee) Group: 01 - Lecturer** are **required**. Choose a different employee group depending on the type of appointment you’re approving (Additional Employment, TA, GA, etc.)

**Empl ID** (Employee CHRS ID) and **Dept ID (Department ID)** are optional. Approvers who have access to multiple departments enter the Dept. ID to sort out the pending approval list.

## Review appointments

**DEPT CHAIRS AND DEANS** – your main objective is to review the grade, base rate and WTU’s for accuracy. Once these columns are reviewed, you may jump to page 7 to continue the approval process.

College Analysts and FA should review all the data outlined below.

**Step 1: Appt Data (Appointment Data)** – The original screenshot is split into two sections. Check the data in the selected columns from 1 to 5 in the first section the screenshot and from 6 to 10 in the second section below. “Red” columns contain Required data, “Green” columns should be “checked” when it’s applicable.

Data Entry (Lecturer Group)

| Appt Data |           | Add Data |      | Appt Log     |               | Approval     |          | Notification |            |          |             |                           |         |           |      |
|-----------|-----------|----------|------|--------------|---------------|--------------|----------|--------------|------------|----------|-------------|---------------------------|---------|-----------|------|
| *Empl ID  | Empl Rcd  | Eff Seq  | Name | Empl Stat    | Business Unit | Position Nbr | Job Code | *Grade       | *Base Rate | Dept ID  | Description | Term                      | Session | *Add Type |      |
| 1         | 100081754 | 1        | 0    | Mickey Mouse | 1             | POCMP        | 10025791 | 2358         | 3          | 6,500.00 | 16800       | Dept of Theatre and Dance | 2258    | 1         | 1006 |

- 1) Empl Rcd (Employee Record No.) and Empl Stat (Employment Status):** Click the status to view the TF (Temp Faculty) Job History and check whether the lecturer already has an existing Empl Rcd (Employee Record) number under the same Dept ID. For example, Mickey Mouse currently has an existing “Empl Rcd” number “0” with Comm. Studies and the job code is 2354 (for TA), not **2358** (for Lecturer). A new record number has to be generated for Theatre and Dance. If you notice an error with the Empl Rcd, click on the “Approval” tab to enter a note in the comments with the correct Empl Rcd. Pushback to the Originator so that they can make a correction.

TF Job History

Empl ID: 100081754 Mickey Mouse

| Empl Rcd | EffDt      | Eff Seq | Position Nbr | Business Unit | Dept ID | Dept Name             | Job Code | Job Code Descr        | Pay Status | Action | Reason | Fraction | WTU         | FTE       | Expected Job End Date |
|----------|------------|---------|--------------|---------------|---------|-----------------------|----------|-----------------------|------------|--------|--------|----------|-------------|-----------|-----------------------|
| 0        | 08/24/2011 | 1       | 10026004     | POCMP         | 15200   | Communication Studies | 2354     | Teaching Associate AY | Terminated | TER    | CNL    | 0/0      | 7.500000000 | 0.5000000 | 01/04/2012            |

| Empl Rcd | EffDt      | Eff Seq | Position Nbr | Business Unit | Dept ID | Dept Name                 | Job Code | Job Code Descr                 | EE Group | Appt Nbr  | Step/Level | WTU         | FTE       | Action Performed  |
|----------|------------|---------|--------------|---------------|---------|---------------------------|----------|--------------------------------|----------|-----------|------------|-------------|-----------|-------------------|
| 2        | 05/28/2024 | 0       | 10038340     | POCMP         | 20204   | Accounting                | 2457     | IF Summer Session State Supprt | 05       | 600000281 | 3          | 3.000000000 | 0.2000000 | Pending Approvals |
| 3        | 08/20/2025 | 0       | 10025791     | POCMP         | 16800   | Dept of Theatre and Dance | 2358     | Lecturer AY                    | 01       | 600000341 | 1          | 6.000000000 | 0.4000000 | Pending Approvals |

Term: 2258 Fall 2025

- 2) **Position Nbr (Position Number):** Check if the position number is correct.
- 3) **Grade and Base Rate:**
  - a) **Existing Lecturer:** Do **not** modify the data in the system. Payroll will update the grade and base rate for lecturers who receive a grade and base rate changes (Ex: Range Elevation) **after** the new appointment is approved.
  - b) **New Hires:** Approvers must verify that the grade and base rate match the information approved by the college.
- 4) **Term:** 2XXY - XX=last digits of given year, Y= corresponding digit for semester (7=Fall; 3=Spring; 5=Summer). Ex: 2267– Fall 2026; 2273 – Spring 2027.
- 5) **Appt Type (Appointment Type):**

**003 - 12.3 Entitlement (Academic Year) – DO NOT USE 001**

006 - Semester Appointment  
014 - 12.12 Entitlement Yr 1 of 3  
015 - 12.12 Entitlement Yr 2 of 3  
016 - 12.12 Entitlement Yr 3 of 3

| Personalize   Find   View All   1 of 1   Last |                          |        |            |            |                  |             |          |             |                 |           |                          |                          |                          |                                     |
|---|--------------------------|--------|------------|------------|------------------|-------------|----------|-------------|-----------------|-----------|--------------------------|--------------------------|--------------------------|-------------------------------------|
| 6   | 7                        | 8      | 9          | 10         |                  |             |          |             |                 |           |                          |                          |                          |                                     |
| Other Action                                  | Revision                 | Adjust | EffDt      | End Dt     | *Multi Term Date | *WTU        | *FTE     | Entitlement | Actual CompRate | Term Rate | Unconditional            | REH Annuit               | Diff Appt                | Ready?                              |
|   | <input type="checkbox"/> |        | 08/20/2025 | 01/02/2026 | 01/02/2026       | 6.000000000 | 0.400000 | 0           | 2,600.00        | 15,600.00 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

- 6) **Other Action: “No Change”** should be selected for the following groups of lecturers -
  - **Fall Semester:** 3-Year Appointments (both FT and PT) **only** in **Year 2 of 3 (015) and Year 3 of 3 (016)** with **NO** WTU changes from the previous Spring semester.
  - **Spring Semester:** AY Appointment (003), and all 3-Year Appointments (014, 015, and 016) with **NO** WTU changes from the previous Fall semester.

If you see any other options were selected in this column, refer to Step 3 – “Approve an Appointment or Push Back” below for more details.
- 7) **WTU (Weighted Teaching Unit):** Check if the WTU is correct.
- 8) **Entitlement:** Check if the entitlement is correct. **“0” is required for the semester appointment (006).**
- 9) **Unconditional:** This box has to be “checked” for **3-Year Full-Time lecturer** with 30 WTUs entitlement.
- 10) **REH Annuit (Rehired Annuitant):** This box has to be “checked” for rehired annuitants.

## Step 2: Add Data (Additional Data) – How to check New Action and New Actn Rsn (New Action Reason)

1. Click the Add Data tab.

2. Click the Empl Stat to open the TF Job History.

3. Identify the Dept ID and Job Code (2358) for lecturers who have multiple job history.

4. Use the list below to check the New Action/Actn Rsn.

5. A reference date for appt type.

6. Confirm New Action/New Actn Rsn.

| Recruitment Type  | Pay Status   | New Action                   | New Actn Rsn  |
|---|--|------------------------------|---|
| <b>New Hire</b> – First employment at CPP - <b>Empl Rcd #0</b>  | <b>N/A</b> – Appointment data is listed in “Staging Data” column.    | HIR (Hire)                   | APT (New Temp Appointment)  |
| <b>New Hire</b> with another position on campus <b>currently (Active)</b> or <b>previously (Terminated)</b> – <b>New Empl Rcd # is needed.</b>  | Active (Current) or Terminated (Previously) with the other position. | HIR (Hire)                   | CON (Concurrent)  |
| Returning Lecturer with “Terminated” status   | Terminated   | REH (Rehire)                 | REH (Rehire)  |
| Existing Lecturer with “Active” status  | Active   | DTA (Data Change)            | APT (New Temp Appointment)  |
| <b>Fall Semester</b> – Existing 3-Year Lecturers in <b>Year 2 of 3 and Year 3 of 3</b> with <b>NO</b> WTU (time base) changes from the previous Spring semester – With “ <b>No Change</b> ” option selected.<br><b>Spring Semester</b> – <b>12.3 Entitlement, all 3-Year Appointments</b> with <b>NO</b> WTU (time base) changes from the previous Fall semester – With “ <b>No Change</b> ” option selected. | Active   | <b>DTA</b> (Data Change)     | <b>CNR</b> (Contract Revision) – <b>Only</b> generate appt notice for current term without changing the workload in Job Data. |
| <b>Fall Semester</b> – Existing 3-Year Lecturers in <b>Year 2 of 3 and Year 3 of 3 WITH</b> WTU (time base) changes from the previous Spring semester.<br><b>Spring Semester</b> – <b>12.3 Entitlement, all 3-Year Appointments WITH</b> WTU (time base) changes from the previous Fall semester.   | Active   | <b>PAY</b> (Pay Rate Change) | <b>TBC</b> (Time Base Change)   |

## Approve an Appointment: The appointment needs no modifications

- Click the "Approval" tab.
- Check "Approve" and then click "Save & Submit." **Do not use "Save for later."**

The screenshot shows the 'Data Entry (Lecturer Group)' interface. The 'Approval' tab is selected. The table below shows appointment details for Mickey Mouse. The 'Approve?' checkbox is checked. The 'Save & Submit' button is highlighted with a red box.

| *Empl ID   | Empl Rcd | Eff Seq | Name         | Empl Stat | Business Unit | *Position Nbr | Job Code | *Grade | *Base Rate | Dept ID | Description               | Last Submitted DateTime | Appt Nbr  | Step Level | Approve?                            | Comments |
|------------|----------|---------|--------------|-----------|---------------|---------------|----------|--------|------------|---------|---------------------------|-------------------------|-----------|------------|-------------------------------------|----------|
| 1100081754 | 3        | 0       | Mickey Mouse | .         | .             | 10025791      | Q 2358   | 3      | 6,500.00   | 16800   | Dept of Theatre and Dance | 06/10/2025 10:25:58PM   | 600000341 | 1          | <input checked="" type="checkbox"/> |          |

## Pushback an Appointment: The appointment requires a revision

- Click the "magnify glass" and select "0" – the originator; enter a reason (Ex: update WTU, incorrect "Empl Rcd" number, etc.); and then click "Save & Submit"

**NOTE: "Delete" is for Faculty Affairs use only.**

The screenshot shows the 'Data Entry (Lecturer Group)' interface. The 'Pushback?' button is highlighted with a red box and labeled '1'. The 'Reason' field is highlighted with a red box and labeled '2'. The 'Save & Submit' button is highlighted with a red box and labeled '3'. A 'Look Up Pushback?' dialog box is open, showing search results for '0 Originator'.

| Step | Description      |
|------|------------------|
| 0    | Originator       |
| 1    | Department Chair |
| 2    | College Analyst  |