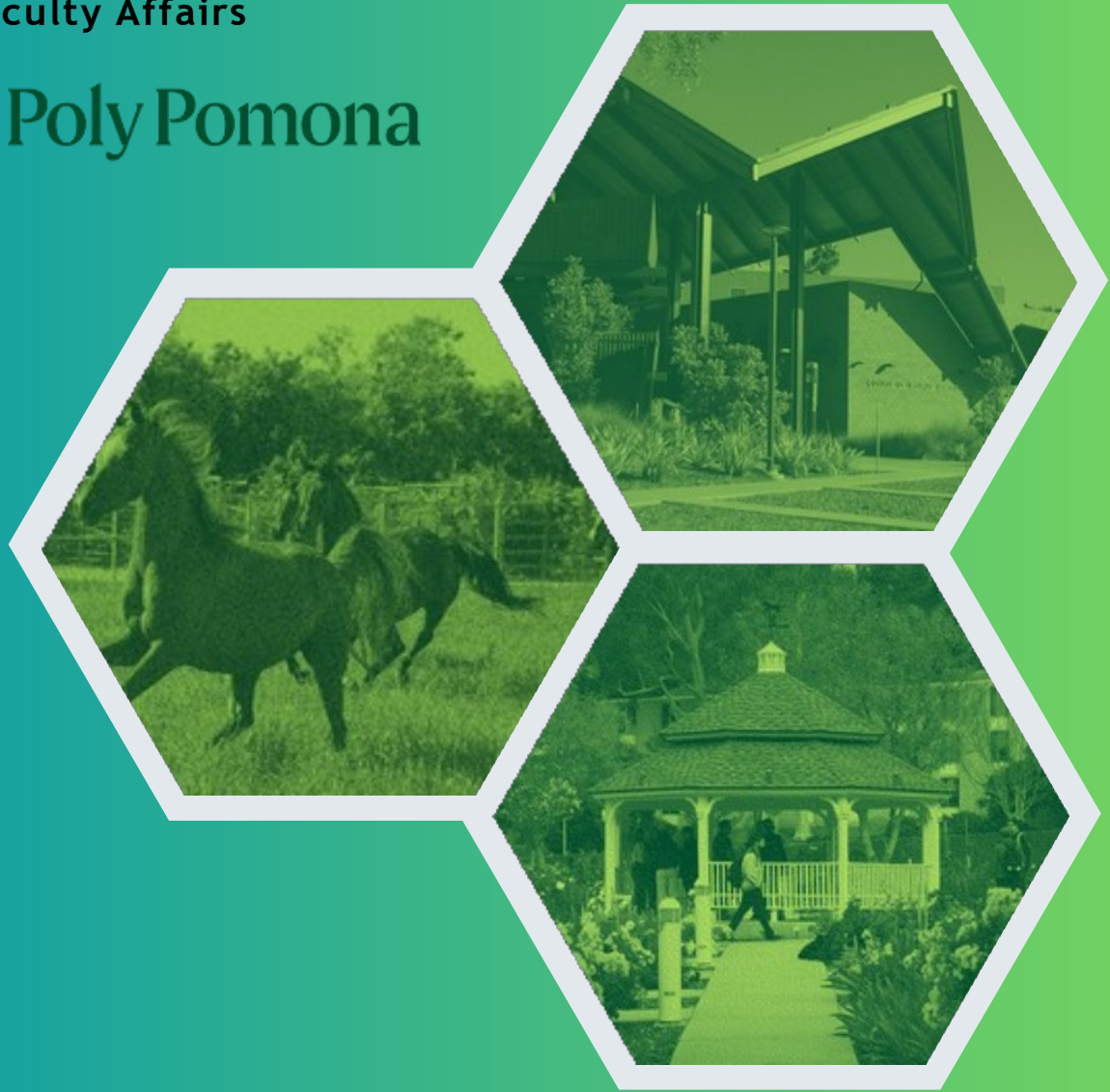


Faculty Affairs



Cal Poly Pomona



ISA Appointment Entry in the TAE Module

Updated 3/19/26

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Enter TAE Appointment Data – ISA (Instructional Student Assistant)

1. Navigate to CSU TAE Appointment Data Entry:

 Menu > CSU Temp Academic Employment > CSU TAE Appointment Data Entry.

2. Use search criteria, EE Group 11, to view student employees in your respective area. If you have multiple programs, you can use Dept ID to view student employees by programs.

Search Criteria

*Business Unit: POCMP Cal Poly Pomona

EE Group: 11 ISA

Empl ID: []

Dept ID: []

Term: []

Job Code: []

Lookback Dt: 05/06/2022

3.
 - a. If a student has previously been employed in the specific dept, employee information is retrieved from Job Data. If a student employee has worked multiple consecutive jobs, the most recent job is retrieved.
 - b. If a student employee is not in the search results, or is new to your department, add a student employee by using Add New Person button.

Data Entry (ISA Group)

Appt Data | Add Data | Appt Log

*Empl ID	Empl Rcd	Eff Seq	Name	Empl Stat	Business Unit	*Position Nbr	Job Code	*Grade	*Base Rate	Dept ID	Description	Term	Session	*Appt Type	Other Action	Adjust	EffDt	End Date	*Hour	
1	0	0																		

Buttons: Save for later, Add new Person, Save & Submit, Select All, Deselect All

4. Once a new row populates or student employee's information is retrieved, continue with appointment data entry from the left to the right of the same row.

Data Entry (ISA Group)

Appt Data | Add Data | Appt Log

*Empl ID	Empl Rcd	Eff Seq	Name	Empl Stat	Business Unit	*Position Nbr	Job Code	*Grade	*Base Rate	Dept ID	Description	Term	Session	*Appt Type	Other Action	Adjust	EffDt	End Date	*Hour	
NEW	0	0																		

5. Click on the "Duties" tab and enter all relevant information (course #, title, etc.). Note that this information is optional and will show on their contract. **Note you must enter "yes" or "no" under the "observe class" field (scroll all the way to the right).**

Search Criteria

*Business Unit: POCMP Cal Poly Pomona

EE Group: 11 ISA

Empl ID: []

Dept ID: []

Term: []

Job Code: []

Lookback Dt: 09/20/2024

Search

Data Entry (ISA Group)

Appt Data | Add Data | Duties | Appt Log

*Empl ID	Rcd	Seq	Name	Empl Stat	Business Unit	*Position Nbr	Job Code	*Grade	Dept ID	Description	Reports To Emplid	Reports to Name	Course #	Course Title	Location	Day	*Observe Class
1	3	0		Terminated	POCMP	10065753	1150	0	50400	Kinesiology & Health Promotion	100178015						
2	4	0		Active	POCMP	10065753	1150	0	50400	Kinesiology & Health Promotion	100178015						
3	2	0		Terminated	POCMP	10066876	1150	0	33000	Learning Resource Center	100168820						

6. Select Ready when the entire row is completed and ready for processing.

Data Entry (ISA Group)

Appt Data | Add Data | Appt Log

*Empl ID	Empl Rcd	Seq	Name	Stat	Business Unit	*Position Nbr	Job Code	*Grade	*Base Rate	Dept ID	Description	Term	Session	*Appt Type	Other Action	Adjust	EffDt	End Date	*Hourly Rt	*Min Hours	*Max Hours	RE Amt	Ready
100042499	3	0	Jamie Fraser	Active	CICMP	10015295	1150	0	18.000000	310842	Undergraduate Studies	2242	1	006			01/18/2024	05/24/2024	18.000000	10	15		<input checked="" type="checkbox"/>
100042500	5	0	Brianna Fraser	Active	CICMP	10015295	1150	0	17.000000	310842	Undergraduate Studies	2242	1	002			02/01/2024	05/30/2024	17.000000	10.00000	15.00000		<input checked="" type="checkbox"/>
3	0	0																					<input type="checkbox"/>

7. Click Save & Submit for approval.

Save & Submit

ISA Hire and Appt Data Entry Tips

- ISAs need to complete the new hire paperwork and onboarding with HR before they can start and before being entered into TAE.
- ISAs can work up to 20 hours per week.
- Complete the following fields: Position Number, Term, Session, Appt Type (12 mo-002), EffDt, End Date, Hourly Rt, Min Hours, and Max Hours. (Min Hours field has to be at least 1.)

The screenshot shows a software interface for entering appointment data. The table below represents the data shown in the screenshot, with red boxes highlighting the fields mentioned in the text: Position Nbr, Term, Session, Appt Type, EffDt, End Date, Hourly Rt, Min Hours, and Max Hours.

*Empl ID	Empl Rcd	Eff Seq	Name	Empl Stat	Business Unit	*Position Nbr	Job Code	*Grade	*Base Rate	Dept ID	Description	Term	Session	*Appt Type	Other Action	Adjust	EffDt	End Date	Hourly Rt	*Min Hours	*Max Hours	REH Annuity	Ready?
1	100042499	3	Jamie Fraser	Active	CICMP	10015295	1150	0	18.000000	310842	Undergraduate Studies	2242	1	002			01/18/2024	05/24/2024	18.000000	10.00000	15.00000	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- You may not know Min&Max Hour range until the first week of the semester. Use the estimate of ISA work hours during academic days. EffDt and End Date can be flexible (slightly earlier or later than the academic days); however, ISA work days should not be in June or July which is outside of AY dates.

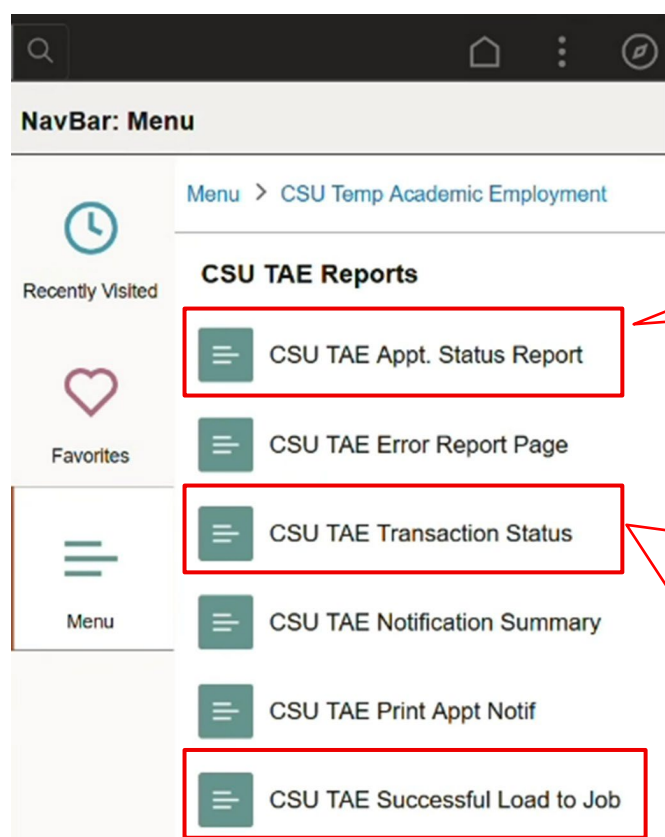
Revision Process

How you revise an appointment in TAE depends on the status of the appointment– whether it is **before** or **after** the appointment has been loaded to Job Data (the system stores all employment records). The two terms used are – **Loaded to Job** or **Not Loaded to Job**.

“**Before** the appointment is loaded to Job Data” (Not Loaded to Job) means – the appointment is still in the approval workflow and has not yet been finalized.

“**After** the appointment is loaded to Job Data” (Loaded to Job) means – the approval workflow is complete, and the appointment data has been sent to Payroll. You will see the student's name re-appears in the TAE data entry list.

There are multiple TAE Reports available to help you track the appointment status. See the next section of this User Guide on how to generate these reports.



The screenshot shows the 'CSU TAE Reports' menu with the following items:

- CSU TAE Appt. Status Report
- CSU TAE Error Report Page
- CSU TAE Transaction Status
- CSU TAE Notification Summary
- CSU TAE Print Appt Notif
- CSU TAE Successful Load to Job

Callout boxes provide the following information:

- CSU TAE Appt. Status Report:**
 - Generates a PDF file
 - Appt Status – Loaded to Job or Not Loaded to Job
- CSU TAE Transaction Status:**
 - If you see the appt appears in this report, it means this appt is still in the approval workflow.
 - Click “Approval Tab” to see which approver currently has the appt.
 - Once the appt is “Loaded to Job”, the approval process is complete, and the appt data will no longer appear in this report. The student's name will appear in the TAE Data Entry list with an “Active” status. You can run either the Appt. Status Report or Successful Load to Job to confirm.
 - Information includes – all data entered in TAE, Act/Act Rsn (for approvers), and Appt Notification Status.
- CSU TAE Successful Load to Job:**
 - If the appt appears in this report, it means the appt has been loaded to Job Data.
 - Information includes – all data entered in TAE, **except** for entitlement, Action/Action Reason (for approvers), and any approver notes.

After identifying the appointment status (**Before** or **After** the appointment is loaded to job), follow the instructions below to begin the revision process.

Before the Appointment Loaded to Job Data (Appt. Status: Not Loaded to Job)

1. Identify if the appointment is still in the approval workflow.
2. Use **Transaction Status Report** to check which approver level the appointment is currently at. See Chapter 3 for details on how to generate this report.

The screenshot shows the 'CSU TAE Transaction Status' interface. At the top, there is a search criteria section for 'SUBMITTED' entries. A red box labeled 'A' highlights the search fields: '*Business Unit', '*EE Group', 'Dept ID', 'Job Code', and 'Position Nbr'. Below this, another red box labeled 'B' highlights the 'Empl ID' field. The interface also has a 'Data Entry (Lecturer Group)' section with a navigation bar containing 'Appt Data', 'Addl Data', 'Appt Log', 'Approval', and 'Notification'. A red box labeled 'C' highlights the 'Approval' tab. Below the navigation bar is a data table with columns: *Empl ID, Empl Rcd, Eff Seq, Name, Empl Stat, Business Unit, *Position Nbr, Job Code, *Grade, *Base Rate, Dept ID, Description, Last Submitted Date/Time, Appt Nbr, Step/Level, and Approve?. A red box labeled 'D' highlights the 'Step/Level' column.

A: Enter the Dept ID if you have multiple departments' access then click "Search."

B: Enter the Empl ID if you are looking for a specific student's appointment.

C: Click the Approval Tab.

D: Locate the EE appointment's approval level – 1: Dept Chair, 2: College Analyst, 3: College Dean, 4: Payroll

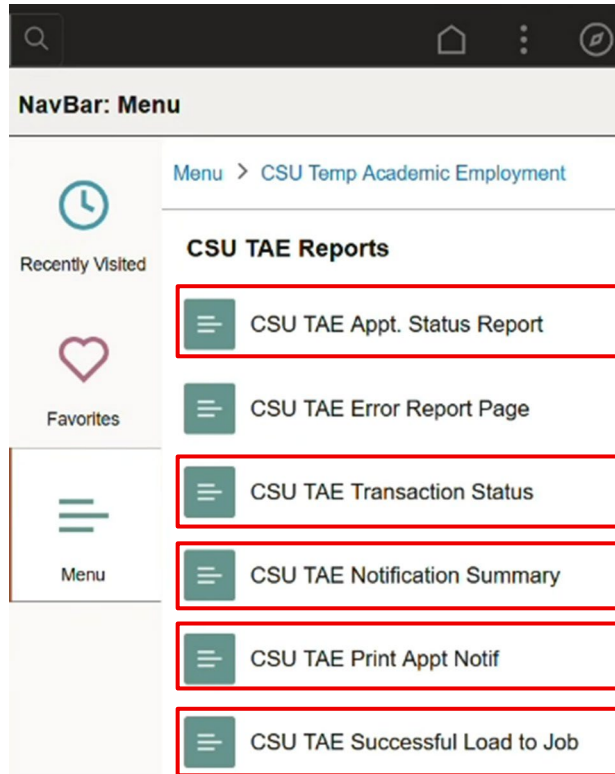
3. **Contact the approver to request that the appointment be pushed back to the originator (level – 1) for revision.**
4. When the originator receives the appointment back in the data entry list, **DO NOT CLICK "Revision."** TAE will automatically check this status when applicable.
5. Follow the data entry process to make the adjustments or corrections.
6. **Always review the entire row of data** again to ensure all information is correct, before clicking "save and submit." Some options may need to be checked or unchecked based on the changes you made.

After the Appointment Loaded to Job Data (Appt Status: Loaded to Job)

7. Confirm that the appointment has been loaded to Job Data – either by seeing the student's name in the data entry list or by running a TAE report (Appt. Status report or Successful Load to Job).
8. Submit the revised appointment on the appointment data entry page and reroute for approval. Make sure to note the reason for the revision.
9. All revisions should be made prior to the designated payroll cutoff to ensure that pay is entered on time. If the revision is made after the designated payroll cutoff, please contact the appropriate Payroll tech, and Workforce Admin Tech letting them know that they should be expecting revisions.
10. Payroll will approve and load the revision into Job Data.

TAE Reports

See the brief introduction to each report below. Details on how to generate the reports are provided on the following pages. **Note: the Transaction Status report will be helpful for most situations.**



➤ Appt. Status Report

1. Generates a PDF file.
2. Use this report to identify whether an appointment has been Loaded to Job or is still in the approval workflow, and to view some of the appointment data entered by the originator.

➤ Transaction Status

1. The main report used to track appt status during the approval workflow and to identify which approver level currently has this appt.
2. Displays all data entered in TAE by the originator.
3. Once the appt is Loaded to Job, the approval workflow is complete, and the appt data will no longer appear in this report.
4. The report can also be used to track whether students have acknowledged their appt **BEFORE** the appt is loaded to job.

➤ Notification Summary

1. Use this report to track whether a student has acknowledged their appointment (after Dean approval).
2. If you do not enter a CHRS Employee ID in the top search filter, the report will display the notification status for all TAE appointments (across all employee groups) that you have access to.

➤ Print Appt Notif (Appointment Notification)

1. Use this report to print student's appointment notifications after Dean's approval.

➤ Successful Load to Job

1. This report lists all appointments that were successfully loaded to Job Data.
2. You can use this report to track the data that you entered in TAE.

Appointment Status Report

1. Navigate to CSU Appt. Status Report - Menu > CSU Temp Academic Employment > CSU TAE Reports > CSU TAE Appt. Status Report.
2. If you already have a saved Run Control, click **Search**. If you have not created one, click **Add a New Value** to set it up.

CSU TAE Appt Status Report

Find an Existing Value ⊕ Add a New Value

▼ **Search Criteria**
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Saved Searches

Search by: Run Control ID begins with

▼ Show more options

Search

3. Enter the Report Request parameters:

CSU TAE Appt. Status Report

CSU TAE Appt Status Report

Run Control ID Report Manager Process Monitor Run

Report Request Parameters

*Business Unit

Department

EE Group

Term

Session Code

From Date To date

Union Code

Transaction Initiated Pending Approval Loaded to Job

1. Enter - Business Unit (required - always choose Pomona), Dept. ID, and EE Group – 11. Enter "Term" to narrow down the search results, but this value will change every semester.

2. Make sure all options are checked.

3. Click Run

Job Code	Description
1	<input type="text"/>

Save Return to Search Previous in List Next in List Notify Add Update/Display

4. Click OK

Process Scheduler Request

[Help](#)

User ID

Run Control ID

Server Name

Run Date

Recurrence

Run Time [Reset to Current Date/Time](#)

Time Zone

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	TAE Appointment Status Report	CSU_TF_169_1	Application Engine	Web	TXT	Distribution

Do not change the format even if you have the options.

5. Click Process Monitor

CSU TAE Appt. Status Report

CSU TAE Appt Status Report

Run Control ID

[Report Manager](#)

Process Instance: 564568

6. Click **Refresh** periodically until the Distribution Status is **Posted**, and then click the **Report Manager**.

Process Monitor

Process List
Server List

View Process Requests

User ID Type Last Days

Server Name Instance Range

Run Status Distribution Status Save On Refresh

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	564568			Application Engine	CSU_TF_169_1	60219712455	11/09/2025 6:35:22PM PST	Success	Posted	Details	⌵ Actions

7. Click on the PDF file to open the report.

Reports

	Report	Report Description	Folder Name
1	CSU_TF_169_1 - CSU_TF_169_1.pdf	CSU_TF_169_1 - CSU_TF_169_1.PDF	General
2	CSU_TF_169_1	TAE APPOINTMENT STATUS REPORT	General

Transaction Status

NOTE: Once the approval workflow/transaction is complete – the appointment is Loaded to Job. The appointment will no longer appear in this report, because the “transaction” is considered completed. The originator will then see the student's name in the data entry list, marked with an "Active" status.

1. Navigate to CSU TAE Transaction Status - Menu > CSU Temp Academic Employment > CSU TAE Reports > CSU TAE Transaction Status
2. Enter "11" in the **EE Group** field. The **Department ID** is optional. If you have access to multiple departments, you may enter the Department ID to narrow your search to a specific department, then click “Search.”

Search Criteria for SUBMITTED entries

*Business Unit <input type="text"/>	*EE Group: <input type="text"/>	Dept ID: <input type="text"/>
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3. The “Appt Data” tab displays the data entered and submitted by the originator.

Data Entry (Lecturer Group)

Appt Data	Addl Data	Appt Log	Approval	Notification	
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4. The “Approval” tab displays the approval step/level and status -
1: Dept. Chair, 2: College Analyst, 3: Dean, 4: Payroll

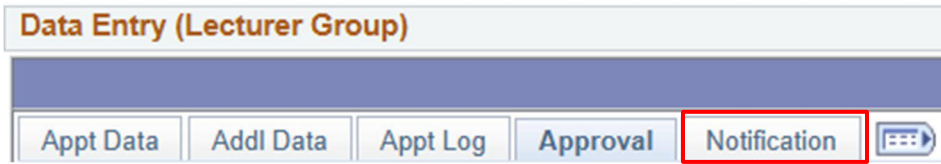
Data Entry (Lecturer Group)

Appt Data	Addl Data	Appt Log	Approval	Notification	
-----------	-----------	----------	-----------------	--------------	--

<u>Dept ID</u>	<u>Description</u>	<u>Last Submitted Date/Time</u>	<u>Appt Nbr</u>	<u>Step/Level</u>	<u>Approve?</u>
----------------	--------------------	---------------------------------	-----------------	-------------------	-----------------

The appointment notification will be issued **after** the Dean's approval at level 3.

5. How to check if a student has acknowledged their appointment – click the **Notification** tab.



The Date the notification Email was sent to the student.

If the date field is blank, it means the appointment is still in the approval process.

The Date the student acknowledged the appointment.

<u>EE Notif Date</u>	<u>Acknowledged?</u>	<u>Acknowledged Date</u>
	<input type="checkbox"/>	
08/19/2025	<input type="checkbox"/>	
08/19/2025	<input checked="" type="checkbox"/>	08/22/2025
08/20/2025	<input checked="" type="checkbox"/>	08/20/2025
08/20/2025	<input checked="" type="checkbox"/>	08/22/2025
08/20/2025	<input type="checkbox"/>	

This appointment is still in the approval process and is not yet available to the student.

The appointment notification was available to the student on 8/19/2025, and the student acknowledged it on 8/22/2025.

The appointment notification was available to the student on 8/20/2025, but hasn't been acknowledged by the student yet.

Notification Summary

1. Navigate to CSU TAE Notification Summary - Menu > CSU Temp Academic Employment > CSU TAE Reports > CSU TAE Notification Summary
2. Enter the search criteria to set up a filter for search results, or the report will be generated to provide all available TAE notifications (ALL EE Groups) that you have access to.

CSU TAE Notification Summary

From and To Dates reflected when the notification was sent.

Business Unit

Acknowledged

Acknowledgment date

From Date

To Date

Term

Empl ID

1. If you check the box, the page displays only rows for which the employee acknowledged the notice.

2. If you clear the box, the page displays only rows for which the employee has not acknowledge the notice.

Enter the Term to narrow down the search results.

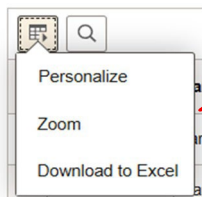
1. CHRS ID# is required to search for specific employee's notification status.

2. Cannot use the employee's name to do a search.

3. Follow the instructions below to sort the results.

A	B					C	
		Empl ID	Name	Email Address	Business Unit	EE Group	Department

A.



- a. Personalized – DO NOT USE.
- b. Zoom – Enlarge the list in a new window. Use “Esc” to exit.
- c. Export the entire report to an Excel file.

B.

chrs.hr.calstate.edu says

Enter search string:

You can enter the student's name here to search. Make sure you check and uncheck “Acknowledged” for the results from both statuses.

- C. Click the field to sort the results by Name (from A to Z), EE Group (11 for ISA), or Dept. ID if you have access to multiple departments in TAE including other EE Groups.

Print Appt Notif (Appointment Notification)

1. Navigate to Menu > CSU Temp Academic Employment > CSU TAE Reports > CSU TAE Print Appt Notif
2. If you already have a saved Run Control, click **Search**. If you have not created one, click **Add a New Value** to set it up.

CSU TAE Print Appt Notif

Find an Existing Value + Add a New Value

▼ Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches ▼ Saved Searches Choose from saved searches ▼

Run Control ID begins with ▼

^ Show fewer options
 Case Sensitive

Search Clear

3. Complete the **required fields** and use the **optional fields** to refine the criteria and then click **“View/Print.”** The appt notifications will open in a new browser tab.

CSU TAE Print Appt Notif

Report Parameters

Required fields – Business Unit and EE Group - 11

*Business Unit:

*EE Group:

Dept ID:

Job Code:

Term:

Empl ID:

Effective From Date: Effective To Date:

Sent From Date: Sent To Date:

Acknowledged
 Canceled

View/Print

Optional field -

Dept ID: Recommended for users with access to multiple departments.

Job Code and Term: Enter Job Code **1150, 1153 or 1153**. Then, use the Term field to narrow your search results.

Empl ID: You need to have the CHRS ID number ready, if you are looking for a specific student's appointment.

Effective From and To Date: The effective date of the appointment.

Sent From and To Date: When the appt notification email was sent to the employee.

Acknowledged: Displays only appt notification that have been acknowledged.

Canceled: Displays only appt notification that have been Canceled.

4. **Note:** When the Adjust field (in TAE Data Entry) has **Late Start** or **Early Term**, the Monthly Pay on the appointment notification is left blank. If the appointment is **Canceled**, certain fields on the appointment notification will be blank.

Successful Load to Job

1. Navigate to Menu > CSU Temp Academic Employment > CSU TAE Reports > CSU TAE Successful Load to Job
2. Complete the **required fields** and use the **optional fields** to refine the criteria and then click “Search Criteria.”

Required fields – Business Unit and EE Group

CSU TAE Successful Load to Job

CSU Successful Load to Job

New Window | Help | Pe

Business Unit SACST Q EE Group Q Empl ID Q Job Code Q

Campus ID Q Department Q From Date To Date

Search Criteria

Clear Search Criteria

Optional fields -

Empl ID: You may search the CHRS ID number by student's name if you are looking for a specific student's appointment.

Job Code: Enter 1150, 1151 or 1153

Dept ID: Recommended for users with access to multiple departments.

From and To Date: When the transaction was loaded to job data.

3. Contact your College Analyst and FA, if you need to make any adjustments or corrections to an appointment listed in this report.