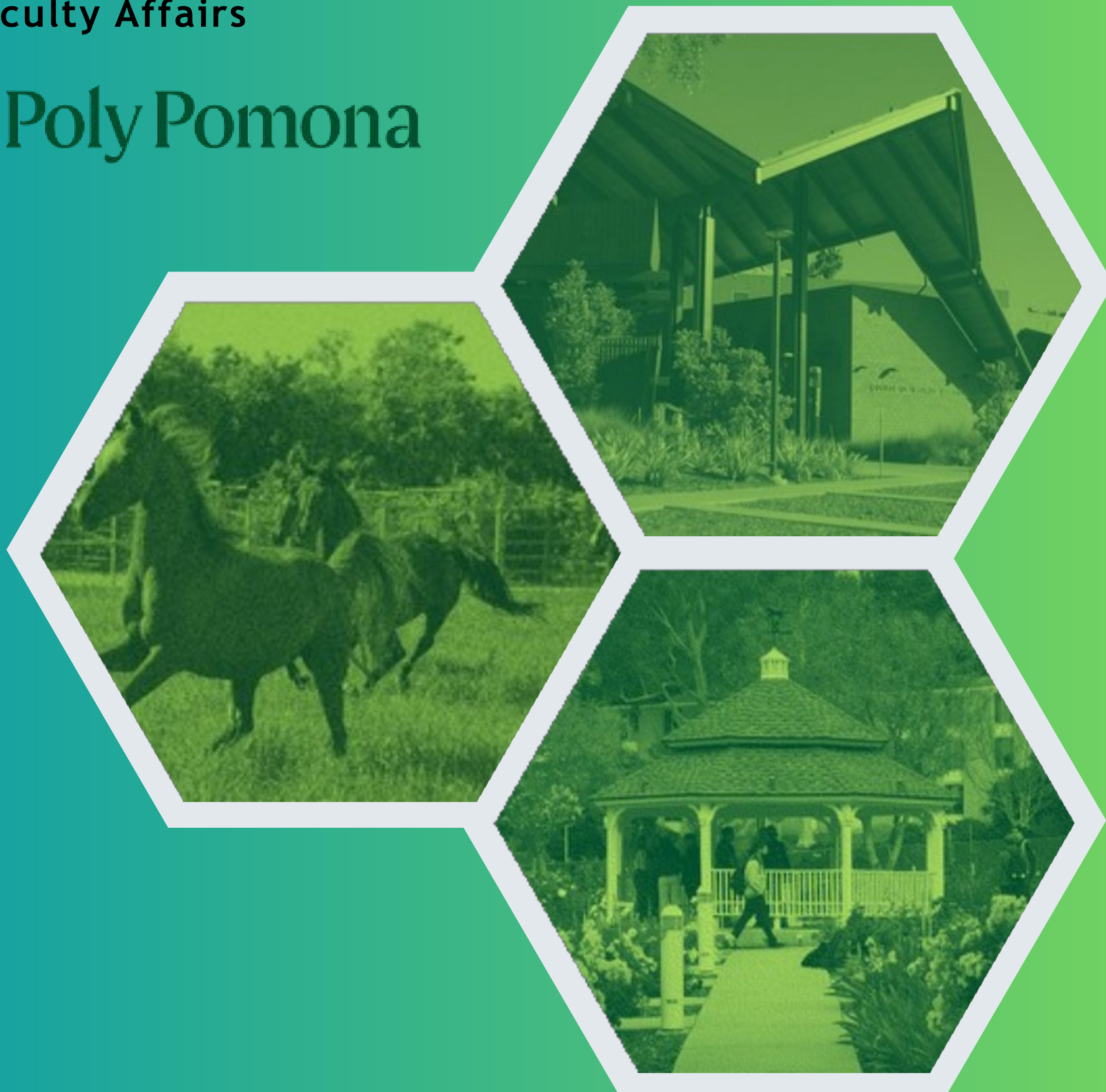
Faculty Affairs

Cal Poly Pomona



ISA Appointment Entry in the TAE Module

Updated 3/19/26

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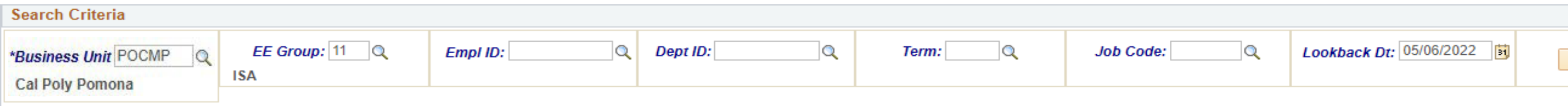
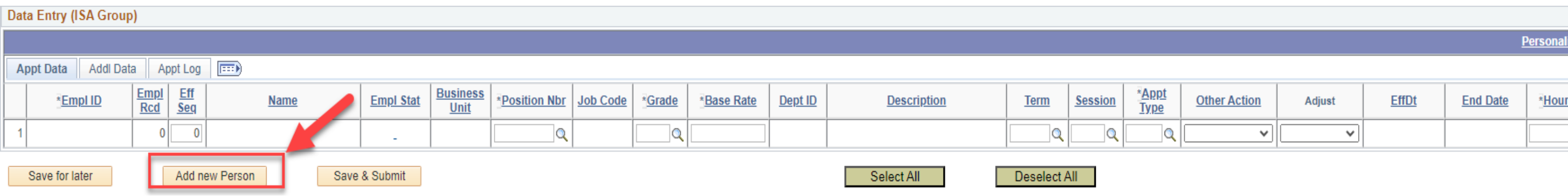
Enter TAE Appointment Data – ISA (Instructional Student Assistant)

1. Navigate to CSU TAE Appointment Data Entry:
   Menu > CSU Temp Academic Employment > CSU TAE Appointment Data Entry.

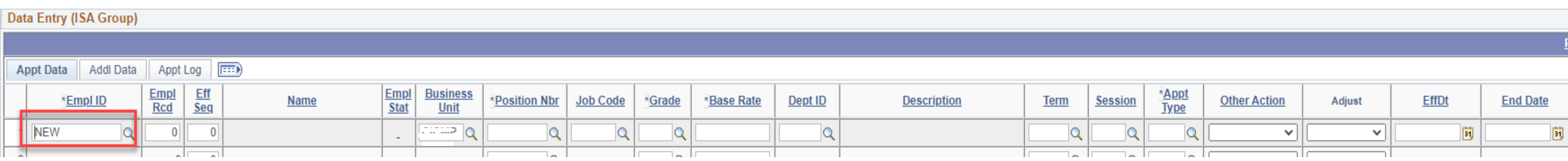
2. Use search criteria, EE Group 11, to view student employees in your respective area. If you have multiple programs, you can use Dept ID to view student employees by programs.



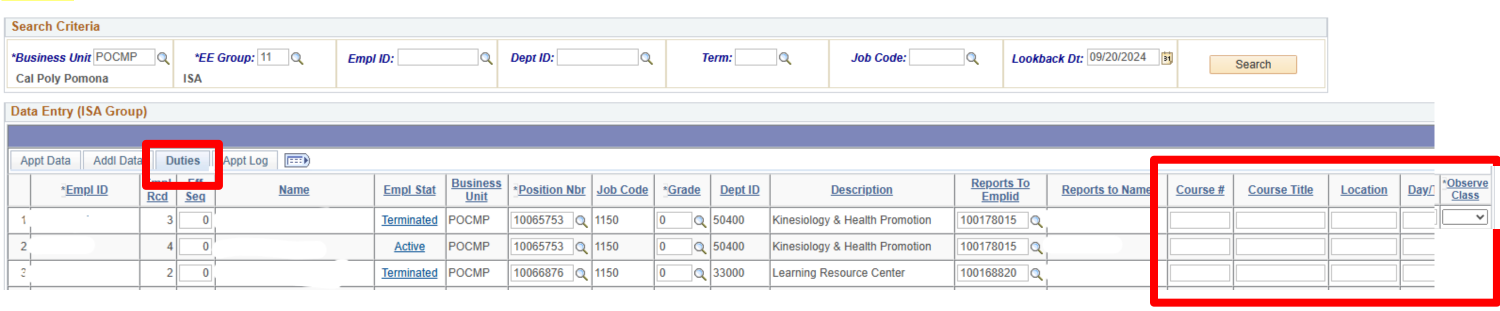
3. a. If a student has previously been employed in the specific dept, employee information is retrieved from Job Data. If a student employee has worked multiple consecutive jobs, the most recent job is retrieved.
   b. If a student employee is not in the search results, or is new to your department,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



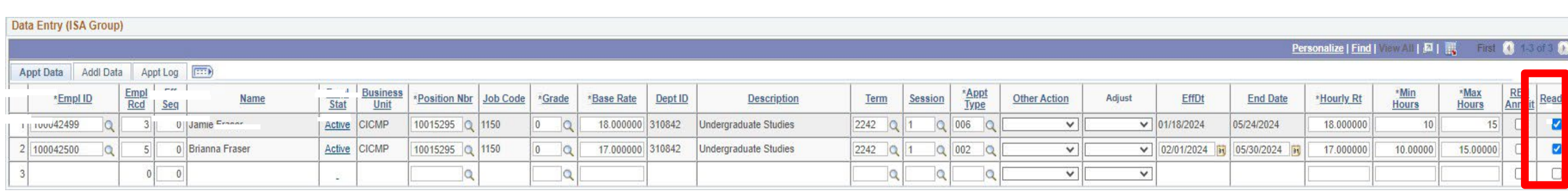
4. Once a new row populates or student employee's information is retrieved, continue with appointment data entry from the left to the right of the same row.



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).



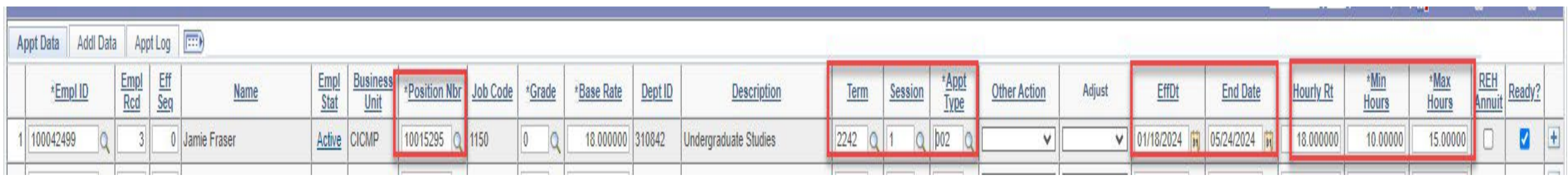
6. Select Ready when the entire row is completed and ready for processing.



7. Click Save & Submit for approval.

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.)



- 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.

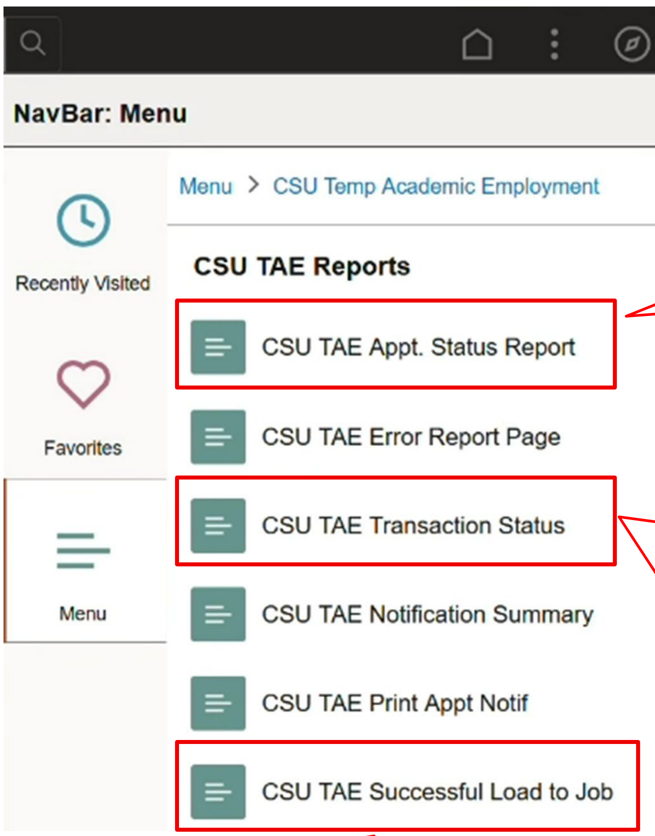
Revision Process

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.



CSU TAE Appt. Status Report:

1. **Generates a PDF file**
2. **Appt Status – Loaded to Job or Not Loaded to Job**

CSU TAE Transaction Status:

1. **If you see the appt appears in this report, it means this appt is still in the approval workflow.**
2. **Click "Approval Tab" to see which approver currently has the appt.**
3. **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.**
4. **Information includes – all data entered in TAE, Act/Act Rsn (for approvers), and Appt Notification Status.**

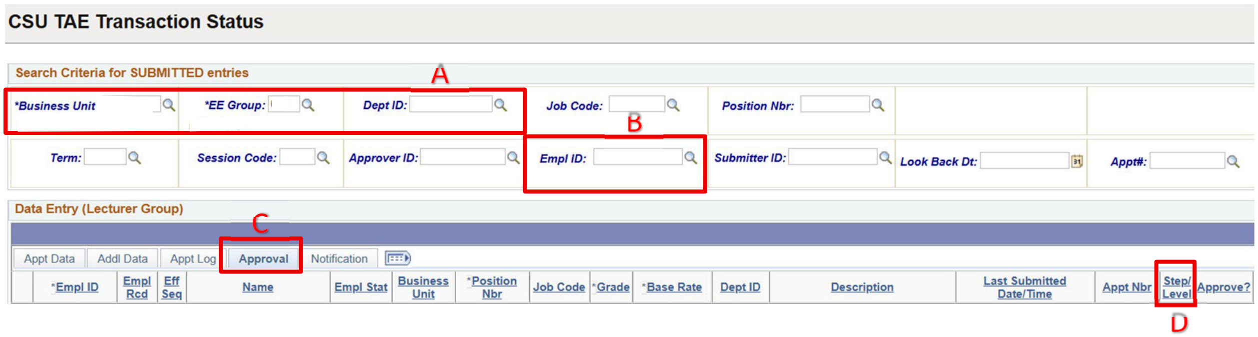
CSU TAE Successful Load to Job:

1. **If the appt appears in this report, it means the appt has been loaded to Job Data.**
2. **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.



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 appointment’s approval level – 1: Dept Chair, 2: College Analyst, 3: College Dean, 4: Payroll

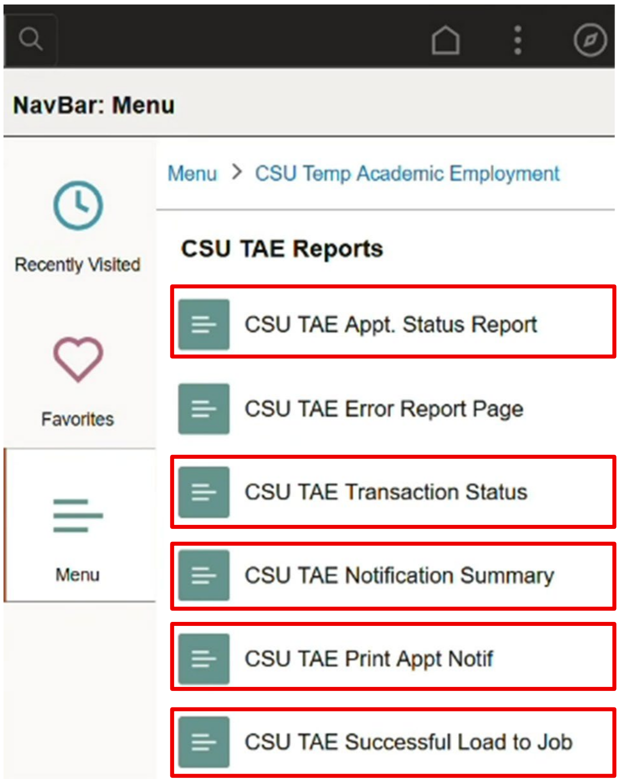
3. **Contact the approver to request that the appointment be pushed back to the originator (level – 1) for revision.**
4. When the originator receives the appointment back in the data entry list, **DO NOT CLICK “Revision.”** TAE will automatically check this status when applicable.
5. Follow the data 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)**

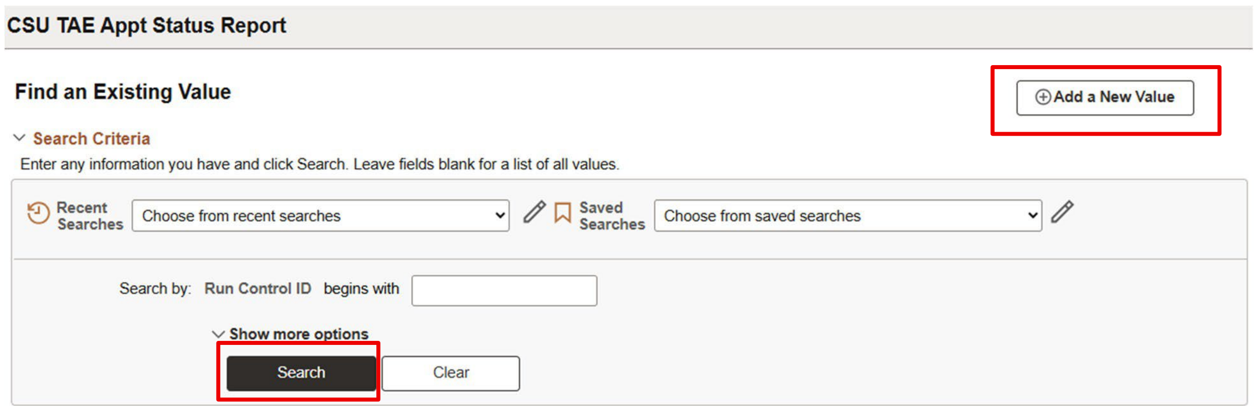
1. Use this report to print student's appointment notifications after Dean's approval.

➢ **Successful Load to Job**

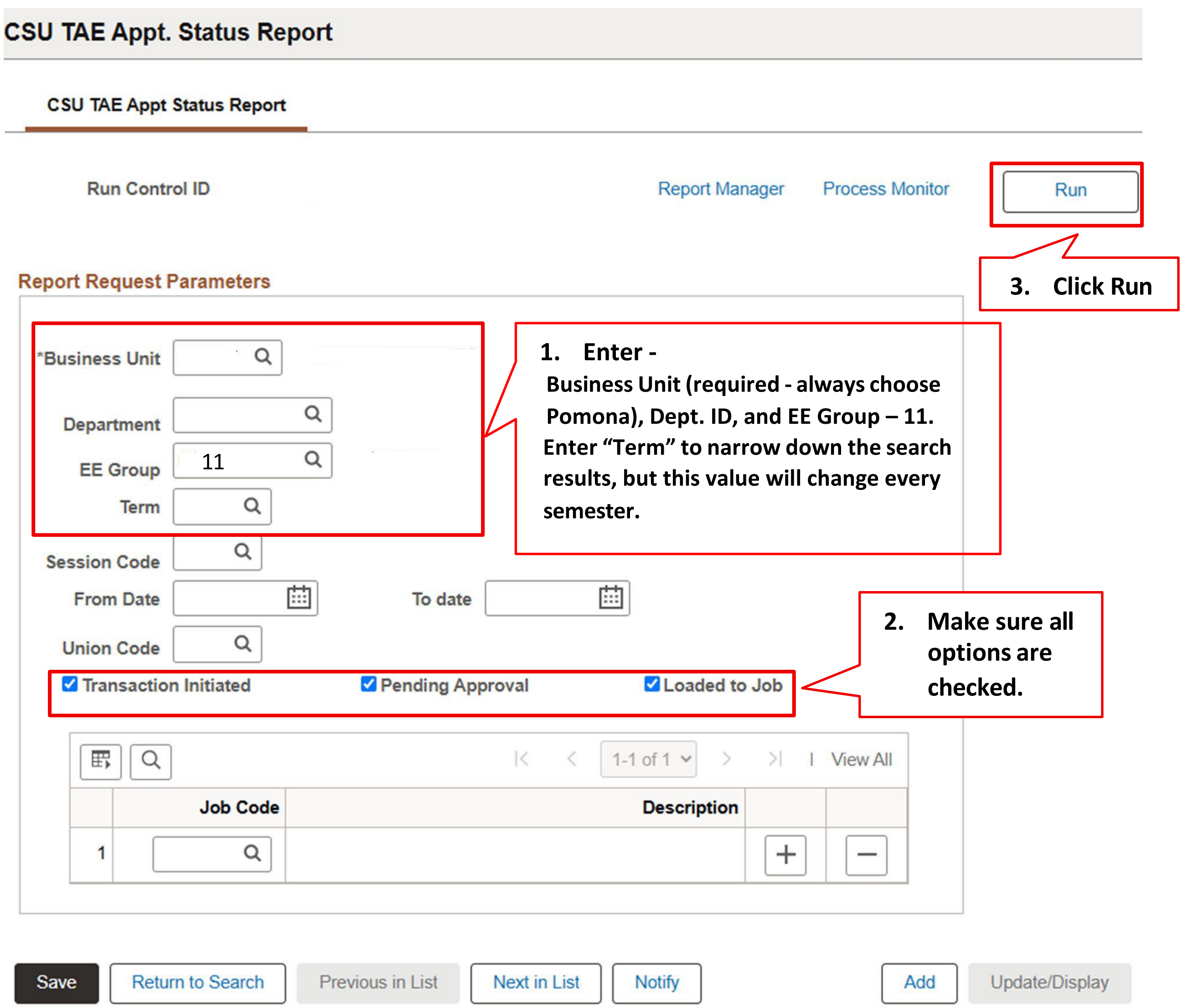
1. This report lists all appointments that were successfully loaded to Job Data.
2. You can use this report to track the data that you entered in TAE.

Appointment Status Report

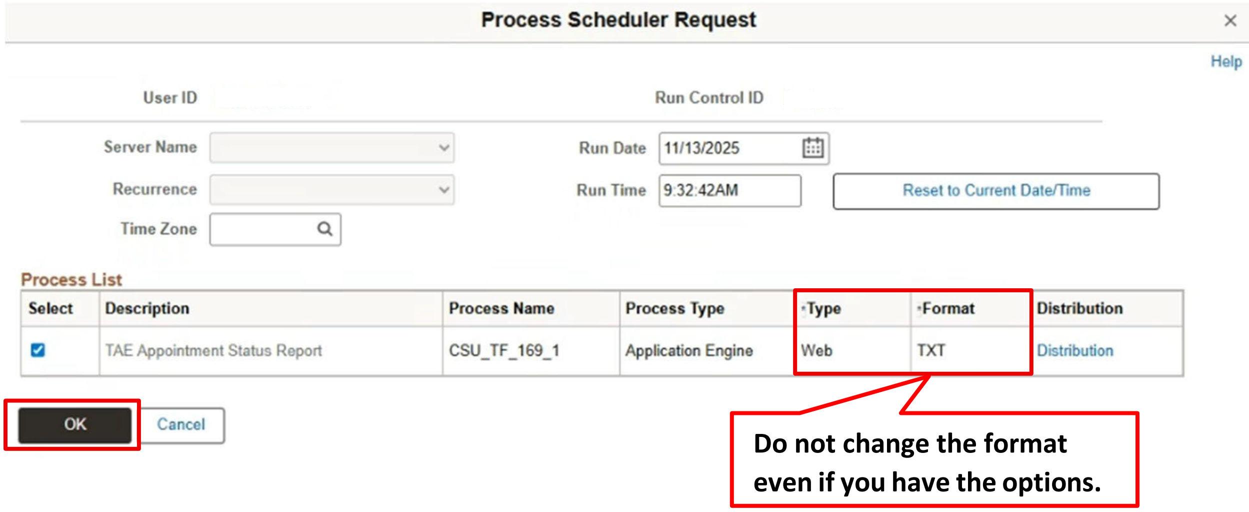
1. Navigate to CSU Appt. Status Report - Menu > CSU Temp Academic Employment > CSU TAE Reports > CSU TAE Appt. Status Report.
2. If you already have a saved Run Control, click **Search**. If you have not created one, click **Add a New Value** to set it up.



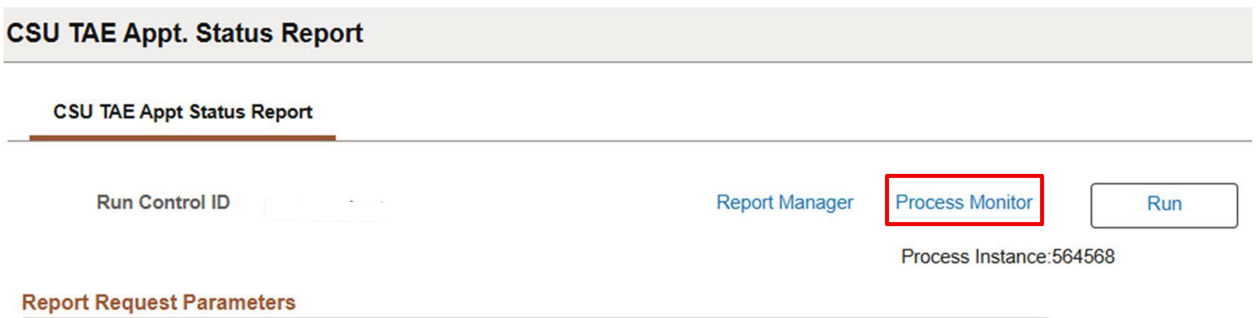
3. Enter the Report Request parameters:



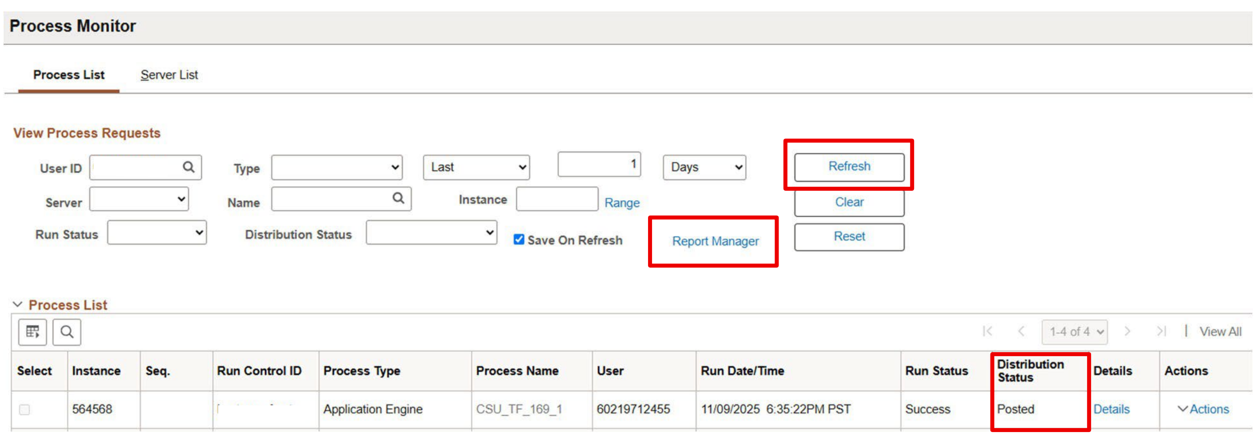
4. Click OK



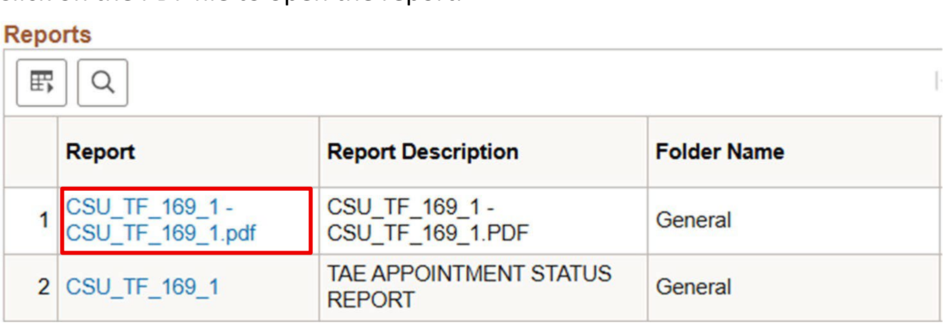
5. Click Process Monitor



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



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

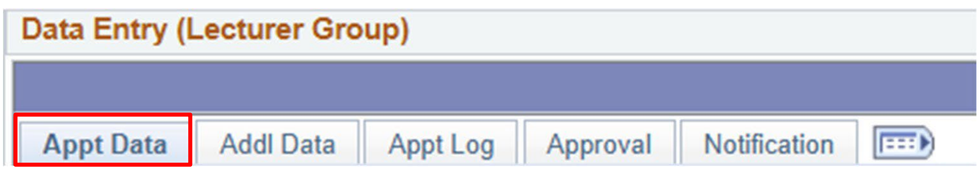


Transaction Status

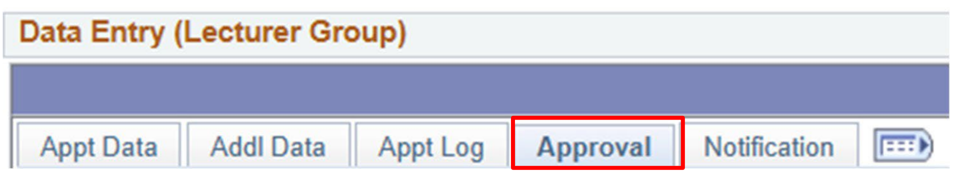
NOTE: Once the approval workflow/transaction is complete – the appointment is Loaded to Job. The appointment will no longer appear in this report, because the “transaction” is considered completed. The originator will then see the student's name in the data entry list, marked with an "Active" status.

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.”**

3. The “**Appt Data**” tab displays the data entered and submitted by the originator.

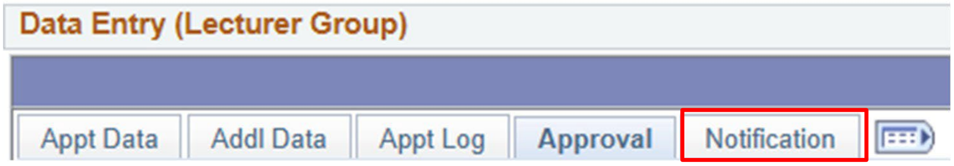


4. The “**Approval**” tab displays the approval step/level and status -
   1: Dept. Chair, 2: College Analyst, 3: Dean, 4: Payroll



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.

EE Notif Date	Acknowledged?	Acknowledged Date
	☐	
08/19/2025	☐	
08/19/2025	☑	08/22/2025
08/20/2025	☑	08/20/2025
08/20/2025	☑	08/22/2025
08/20/2025	☐	

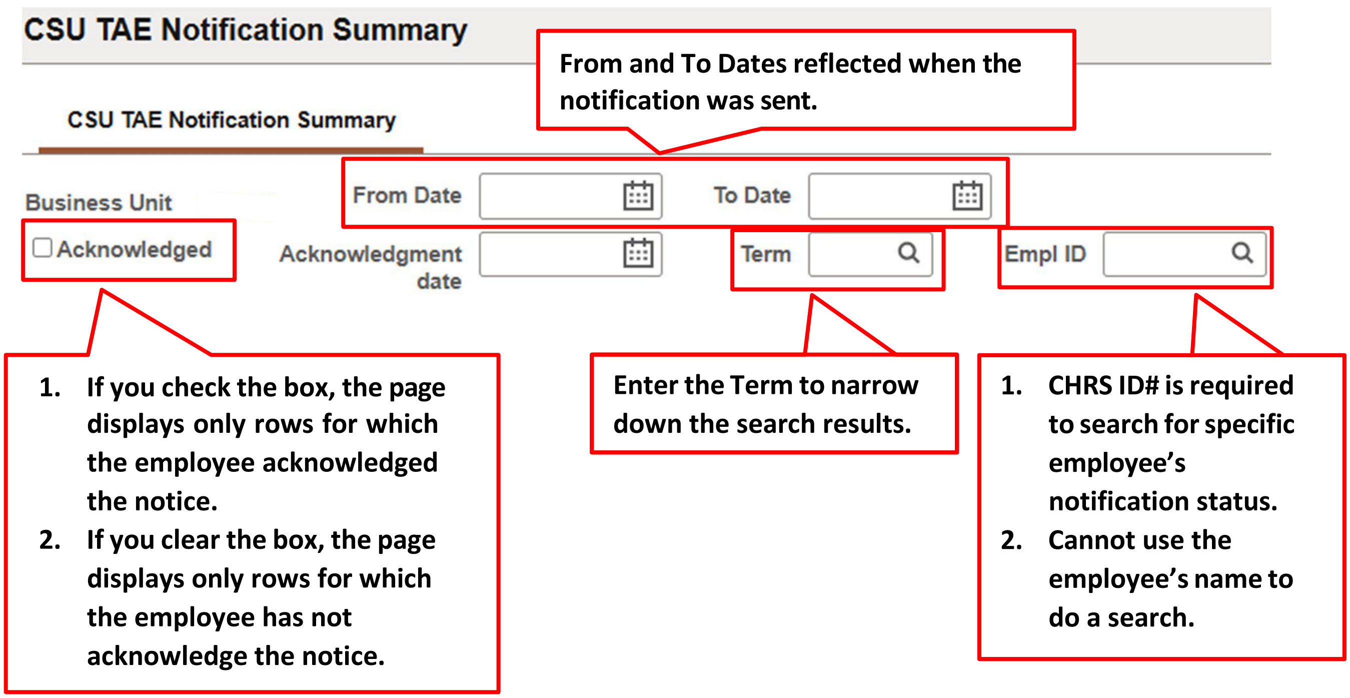
This appointment is still in the approval process and is not yet available to the student.

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.

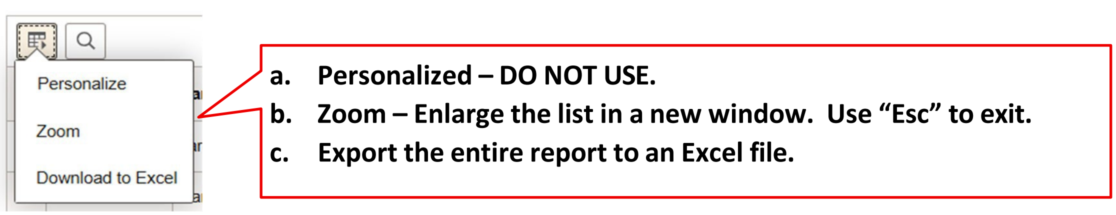
Notification Summary

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.

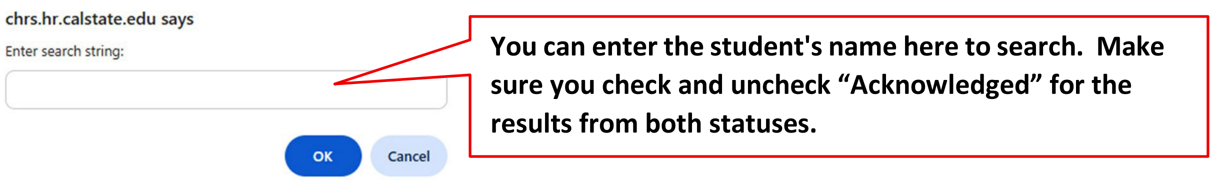


3. Follow the instructions below to sort the results.

A.



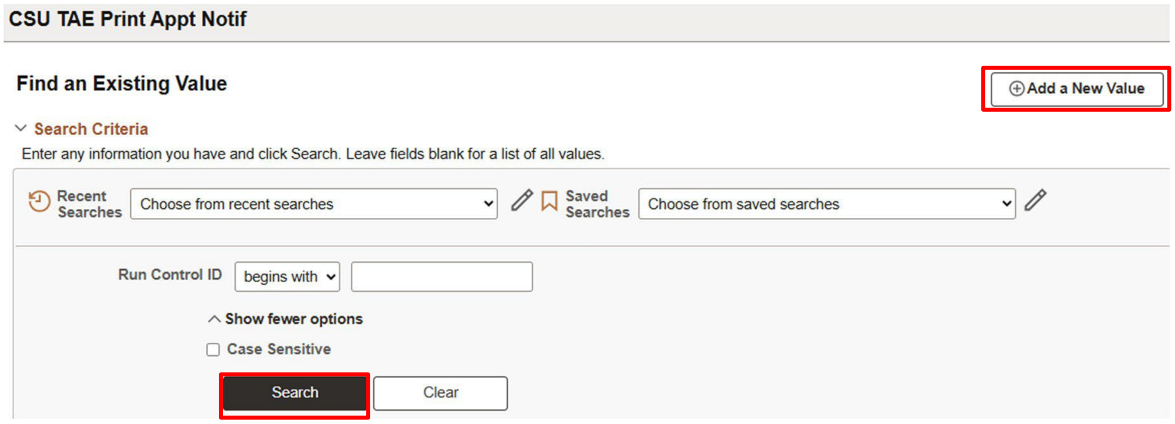
B.



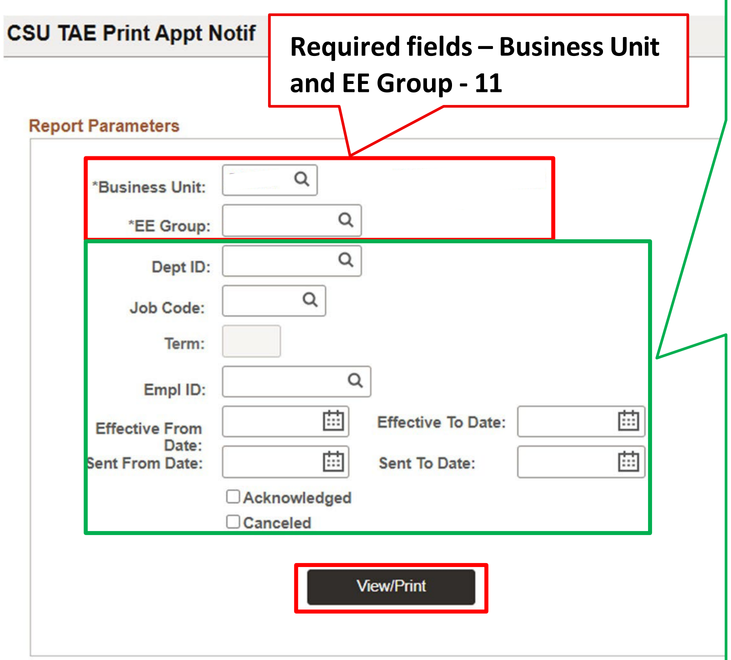
C. Click the field to sort the results by Name (from A to Z), EE Group (11 for ISA), or Dept. ID if you have access to multiple departments in TAE including other EE Groups.

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.



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.



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.

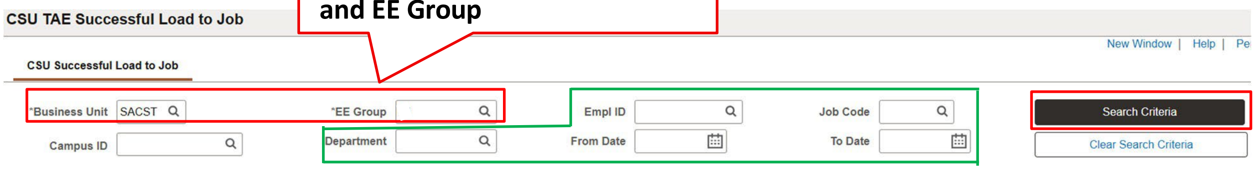
Canceled: Displays only appt notification that have been Canceled.

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



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.