#### Personnel Transaction Reports (PTR)

- UEC Forms Directory: Forms Directory | University Enterprises Corporation | CSUSB
- PTRs are to be filled out when hiring Faculty, Staff, or Students under the grant.
- There are two different PTR forms, one for Faculty & Staff and another for Students.
- PTRs must be submitted at least 4 days prior to the start of work.
- PTRs initiate the hiring process; however, all individuals will be required to fill out additional HR hiring paperwork and complete an I-9 with UEC HR in order for them to be officially hired. <u>Human Resources | University Enterprises Corporation | CSUSB</u>
  - Human Resources
     Office: (909) 537-7589
     Email: <u>uec-hr@csusb.edu</u>
- Document name should be listed as such: Employee/Employment PTR SPA- Fund/Project-Employee's Last Name.
- It is important to note that Faculty Additional Pay request must be submitted prior to submitting the PTR.
- PTRs are also used when there is a change in the individual's pay rate, for reappointment, change of funding source, and to terminate an individual's employment on the grant.
- When submitting the PTRs it is best to use the Adobe Sign link for the respective PTRs provided on the UEC forms directory. These links will have the most up to date PTR form and the necessary UEC approvers already listed as the receivers for the adobe PDF file.
  - Please not that when using that Adode link version of the form, you must have all of the individual's information ready as you will not be able to return to this file to complete it at a later time.

#### If you are the PI completing the PTR for Sponsored program employees, use these PTRS:

Employment and Employee Changes (PTR for students) Employee and Employment Changes PTR Instructions

CSUSB Faculty & State Overload (PTR for Faculty & staff) CSUSB Faculty & State Overload PTR Instructions

Separation Separation PTR Instructions

When you first click on the link for the Adobe form, you will be prompted to enter the recipients' emails; these should already be prefilled. The only thing you will need to edit in this section will be the name of the document. Please add "Fund/Project- Employee's Last Name" to the already prefilled document name.

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

# HR - SPA Employee/Employment Changes-Submitted by PI

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How this workflow works? Enter instruction for sender...

Send from: Users With No Group (Primary Group)

Recipients		0
PI/Project Director*		
& Myself	🚫 🗸 None	Ø
SPA HR*		
Stacy.charlier@csusb.edu	🚫 🗸 None	Ø
RA-SPA*		
SPA_Expenses@csusb.edu	🚫 🗸 None	P
UEC-HR*		
UEC-HR@csusb.edu	🚫 🗸 None	Þ

#### CC | Hide

UEC-Payroll@csusb.edu ×	C	c							
		UEC-Payroll@csusb.edu $\times$							

#### Document Name \*

HR-SPA Employee/Employment	Changes	-Submitted by PI- Fund/Project-Employee's Last	lam	Options	0
Message *				Set Reminder	
Please Sign. Files			1		
Employee/Employme Changes PTR ★	T	HR - Sponsored Programs PTR Employee/ Employment Chan ges (Submitted by PI)			

Send

#### Faculty & Staff PTR



# SPONSORED PROGRAMS

Personnel Transaction Report (PTR) CSUSB Faculty & Staff Overload To be completed by PI/PD or designee

Legal       Legal       Middle         Last Name       First Name       Initial         Coyote ID       Phone/Cell       Number         Email Address       SECTION 2: EMPLOYMENT ACTION AND CLASSIFICATION         Anticipated Start Date       Action Type       One Time Appt/ Award (One Pay Period Only)         Bate of Separation:       Bate of Separation:       Date of Separation:         Pay Rate Change       Separation       Reason:         Status Type       CSUSB Staff at state dessification below       Reason:         SECTION 3: FUNDING SOURCE AND DISTRIBUTION INFORMATION       Account # Fund # Department # Project # Distribution %         Add       Delete       PLEASE ATTACH SEPARATE SHEET OF PAPER FOR ADDITIONAL SPACE
Coyote ID Phone/Cell Number  Email Address  SECTION 2: EMPLOYMENT ACTION AND CLASSIFICATION Anticipated Start Date Action Type Hire One Time Appt/ Award (One Pay Period Only) Date of Separation: Funding Source Change Pay Rate Change Status Type CSUSB Faculty CSUSB Staff & State dessification below Exempt Non-Exempt SECTION 3: FUNDING SOURCE AND DISTRIBUTION INFORMATION Account # Fund # Department # Project # Distribution % Add Delete PLEASE ATTACH SEPARATE SHEET OF PAPER FOR ADDITIONAL SPACE
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SECTION 3: FUNDING SOURCE AND DISTRIBUTION INFORMATION         Account #       Fund #       Department #       Project #       Distribution %         Add
Add     Delete     PLEASE ATTACH SEPARATE SHEET OF PAPER FOR ADDITIONAL SPACE
PLEASE ATTACH SEPARATE SHEET OF PAPER FOR ADDITIONAL SPACE
SECTION 4: JOB INFORMATION
Has the Faculty Add'l Pay State Pay Rate: Work Location:
Yes Hourly: Off- Campus Site
No     Overtime:     Remote Work
UEC Job Title: POS
Comments:
SECTION 5: DEPARTMENT AND CONTACT INFORMATION
PI/PD:Primary:
Email:Email:Email:
Phone: Phone:
SECTION 6: EMPLOYMENT AUTHORIZATON
TRANSACTION IS NOT OFFICIAL WITHOUT ALL REQUIRED SIGNATURES AND FINAL HR APPROVAL
PI/PD: Date: HR: Date:
Employee's Dean/State MPP: Date:
State Pay Rate Verification: Date:
SPA Budget Approval: Date:
HR only:
Copy: Payroll/SPA Labor Alloc Cal Pers Entered:
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UEC ID: Date Entered:

### **Students PTR**

## CAL STATE SAN BERNARDINO **University Enterprises Corporation**

#### SPONSORED PROGRAMS Personnel Transaction Report (PTR) Employment/Employee Changes To be completed by PI/PD or designee

SECTION 1: EMPLOYEE INFORM	ATION								
Legal		Legal				Middle			
Last Name		First Name Initial							
Coyote ID		Phone/Ca number	ell						
Email Address									
SECTION 2: EMPLOYMENT ACTION	ON AND CLASS	SIFICAT	ION						
Anticipated Start Date Action Type				1	HR approval re	quired			
New Hire			ding Source/D		e				
			ition Change/F	-					
	Change*	🖵 Lea	ve of Absence	·					
Employee Classification				enefited, Non					
Benefited Employee	Van	staff	ur Employee		Temporary	(<25 hrs - 90 d)			
Staff (FT)* (40 hrs/wk)	님		rad Student (60	04303)		(<23 m/s - 90 a y □ 60 Day			
Staff (HRLY)* (20-40 hrs/wk)	H	-	tudent (601863)			ncy Appt (12			
Exempt Non-Exempt		0.00 0.	(		P		,		
SECTION 3: FUNDING SOURCE A	ND DISTRIBUT	ION IN	FORMATION						
Account #	Fund #	Dep	partment #	Proj	ect#	Distribution	n %		
ADD									
						<u> </u>	_		
							_		
	TTACH SEPAR/	ATE SHI	EET OF PAPE	R FOR ADD	ITIONAL SF	ACE			
SECTION 4: JOB INFORMATION									
	Pay Rate		% of		New Rate (if	app)	Hours/Week		
	Monthly:		Increase	Monthly:		.			
Market/Equity	Hourly:			Hourly:		-			
UEC Job Title:							POS		
	ork Location		This position	n:		P	03		
Promotion	On-campus			ervisory authority	ority	None of	of the above		
Reclassification	Off-campus		Works with Children						
Recruitment     Remote Work     Has accounting responsibilities									
Comments:									
SECTION 5: DEPARTMENT AND O	CONTACT INFO	DRMATI	ON						
PI/PD:			Primary:						
Email:			Email:						
Phone:			Phone:						
SECTION 6: EMPLOYMENT AUTH									
TRANSACTION IS NOT OFFICIAL	L WITHOUT ALL I	REQUIRE	ED SIGNATURE	S, HR APPRO					
DUDD (Autorized Street)			Deter		HR:		Date:		
PI/PD (Auhtorized Signer):			Date:		Appt Ltr: Notice:		Date: Date:		
SPA Budget Approval:			Date:		-				
HR only (Shaded Area): Bas	se job 🗌	Add'l job			TEMP EE:	Start Date			
Supervisor	End Date					End Date			
Copy: Payroll/SPA/HR 🔳 Labor Alloc 🔳		Ente	ared:						
Directory:		Date Ente	and t						
Pay Group: UEC ID:		Date Ente	ered			-			