

**Personnel Transaction Report (PTR)
Employment & Employee Changes**

All changes in employee 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-Auxiliary Services Corporation ("ASC") **PRIOR** to the effective date. If you have any questions regarding this form, please contact Human Resources.

EMPLOYEE INFORMATION			
S.S.N.	CWID		
Last Name	First Name	Middle Initial	
Address	City		Zip Code
Phone number	Email	<input type="checkbox"/> Current ASC Employee	
Emergency Contact	Phone Number	<input type="checkbox"/> CSUF Faculty/Staff	
<small>All employees are required to meet federally mandated I-9 work eligibility and authorization procedures. All employees therefore must present acceptable work authorization documents in person to Human Resources-ASC no later than their first day of work as a new hire or rehire.</small>			
EMPLOYMENT ACTION AND CLASSIFICATION			
Effective Date	Action Type	Rate Change	<input type="checkbox"/> Leave of Absence (HR approval req)
Account Number	<input type="checkbox"/> New Hire <input type="checkbox"/> Rehire <input type="checkbox"/> Change	<input type="checkbox"/> Rate Change <input type="checkbox"/> Position Change <input type="checkbox"/> Termination	From: _____ To: _____ <input type="checkbox"/> Other: _____
Employee Classification (select only one)		FLSA:	
<input type="checkbox"/> Full-time <input type="checkbox"/> Part-time benefited <input type="checkbox"/> Part-time	<input type="checkbox"/> Temporary <input type="checkbox"/> Student (up to 20/hr wk) <input type="checkbox"/> Internship	<input type="checkbox"/> Exempt (Salary) <input type="checkbox"/> Non-Exempt (Hourly)	
JOB INFORMATION			
Rate Change Reason (if app)	**Pay Rate ** (HR must approve)	% Rate Diff current vs. proposed new rate	**Proposed New Rate (if app)
<input type="checkbox"/> Merit (attach evaluation) <input type="checkbox"/> Promotion (HR must approve) <input type="checkbox"/> Other	Bi-weekly (Salary) Hourly:		Bi-weekly (Salary) Hourly:
Hours/Week			
Job Title:			
Position Change Reason	Work Location	This position:	
<input type="checkbox"/> Promotion-HR approval Req <input type="checkbox"/> Reclassification <input type="checkbox"/> Other (Specify)	<input type="checkbox"/> On-campus <input type="checkbox"/> Off-campus Location: _____	Yes No Has supervisory authority <input type="checkbox"/> <input type="checkbox"/> Works with minors, elderly, or disabled persons <input type="checkbox"/> <input type="checkbox"/> Has cash handling duties/access to level 1 data <input type="checkbox"/> <input type="checkbox"/> Will drive on ASC related business <input type="checkbox"/> <input type="checkbox"/>	
Comments:			
DEPARTMENT AND CONTACT/TIME CLOCK INFORMATION			
Dept/Project Name:	Director/PI: (please print)		
Budget Period:	Email: _____ Phone: _____		
From: _____ To: _____	Person: (please print) Email: _____ Phone: _____		
Time Clock Approver/s: (please print) Email/s: _____ Phone: _____			
REASON FOR SEPARATION			
Effective Date	<input type="checkbox"/> Professional Development <input type="checkbox"/> Better Job <input type="checkbox"/> Better Pay <input type="checkbox"/> Personal Reasons <input type="checkbox"/> Dissatisfaction with Job	<input type="checkbox"/> End Temporary Appt <input type="checkbox"/> Other:	<i>Requires HR Approval</i> <input type="checkbox"/> Job Abandonment <input type="checkbox"/> Layoff <input type="checkbox"/> Dismissal <input type="checkbox"/> Fail Rtn from Leave <input type="checkbox"/> Separation by Agency
Eligible for Rehire? <input type="checkbox"/> Yes <input type="checkbox"/> No			
AUTHORIZATION SIGNATURES			
TRANSACTION IS NOT OFFICIAL WITHOUT ALL REQUIRED SIGNATURES AND FINAL HR APPROVAL			
Employee	Date	Human Resources	Date
Initiating Supervisor	Date	Executive Director	Date
Approving Supervisor	Date	Pay Class	WC Code
OSP/Agency	Date	REQ #	Department to retain own copy

Completing Personnel Transaction Reports (PTRs)

Required fields within each section:

1. Employee Information

- Completed by the employee or the department representative - **required**
*SS # will be filled out by the new hire when presenting I-9 documents.

- CWID - **required**

2. Employment Action & Classification

- Effective date; beginning of a pay period - **required**

Note: leave effective date blank for new hires – date will be filled out by HR

- ASC account number – **required**
Note: If listing multiple accounts for exempt employees, please specify the % on each account if not specified, HR will default to an even split.

- Select action type - **required**

- Select employee classification type - **required**

Note: student classification is only for current CSUF matriculated student

- Select the Fair Labor Standard Act (FLSA) status; hourly or salary - **required**; **Note:** for Salary/Exempt must meet the min CA exempt guideline.

3. Job Information

- Reason for employee's pay rate change i.e. merit, pay equity, additional duties, etc. – **required if applicable**

- Pay rate for new hires (either bi-weekly or hourly rate) or current salary for current employee - **required**

- Proposed New Rate – **required if applicable**

- Job title - **required**

- Reason for employee's position change – **required if applicable**

- Work Location - **required**

- Answer yes or no pertaining to job duties; **required for compliance.**

Note: Level 1 data means sensitive/protected data

- Comments – **required, if applicable.**

4. Department and Contact/Time Clock Information

- Department/Project Name - **required**

- Budget period – **required if applicable**

- Director/PI and Contact Person – **required**

- Additional time clock approvers – **if applicable**

5. Reason for Separation – if applicable

- Effective date (last day of work) – **required**

- Select reason for separation - **required**

- Determine if the employee is eligible for rehire - **required**

- Involuntary separations must have HR approval before proceeding with employee dismissal - **required**

6. Signatures

- Employee (new hires/rehires) – **required** except for involuntary termination
- Initiating Supervisor – optional based on your departmental process
- Approving Supervisor – **required**
- OSP/Campus Program – **required, if applicable**
- Human Resources – **required**
- Executive Director – HR will obtain signature based on policy