

**California State University, Fresno  
Employment Services  
Instructions for Completing the  
Employee Transaction Form (ETF)**

The Department initiating the ETF should complete all fields. A Human Resources Manager within Employment and Recruitment will review the ETF for accuracy and complete any necessary fields not completed by the initiating department.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Fresno State Pos. #	Budget Office	The position number as established in PeopleSoft.
Vacancy Req. #	Employment Services	The Vacancy # established in PeopleSoft this ETF is filling.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Employee Name	Department – if known	Name of Employee
SSN	Department – if known	Social Security Number of Employee
Current Department	Department	Department employee is currently in
Fresno State ID #	Department – if known	Fresno State ID# (previously referred to as PSoft ID #)
Current Classification	Department	Classification the employee is currently in. If the ETF is for a new employee, this field should be left blank
Current Working Job Title	Department	What is the working title for this position, if different than the classification?
Unit	Department – if known	Bargaining Unit of the classification
Department Contact	Department	Who in the department should be contacted if questions arise?
Extension	Department	Telephone extension of the Department Contact person.
MPP / Chair (Evaluator)	Department	The Management Personnel Plan employee or Chair that is responsible for this position. This is the person who is responsible for conducting performance evaluation.
Extension	Department	The telephone extension of the MPP/Chair responsible for this position.
Source of Funds:	Department	Provide the <b>Fund, Org ID, Class, and Account</b> for the position. If there is no change from the previous funding source, the No Change box can be checked.
Budget Level	Department	Is the position budgeted by <b>Appointment</b> or by <b>Pool</b> ? If by Pool, provide Pool ID #.
Grant Funded	Department	Is the position funded by a grant? If so, check the box and provide the grant number.

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<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Transaction Type	Department – if known	Check the most appropriate transaction type. If you do not know the transaction type, leave blank and that will be completed by Employment and Recruitment.
Detail Tran. Code	Employment Services	Employment & Recruitment when appropriate will complete these two fields.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Separation	Department → Benefits Manager → Human Resources →	For <b>Resignation</b> or <b>End of Temp. Appt.</b> For <b>Service Retirement</b> or <b>Disability Retirement</b> For <b>Termination</b> or <b>Other</b>
Reason for Resignation	Department – if known	If any of the options in the drop down box are appropriate for the reason for resignation, the department should complete this field. If none of the reasons are appropriate the department should leave blank.  <i>Note: For all resignations, a letter of resignation from the employee and an acknowledgment of receipt and acceptance of the letter from the manager of the department must be attached to the ETF.</i>
Effective Date of Separation	Department → Human Resources →	For Resignation or End of Temp. Appt.  Termination or Other  <i>Note of explanation: The effective date for any separation is always the close of the business on the final day that the individual is considered an employee of the university.</i>
Effective Date of Retirement	Benefits Manager	This field will only be filled out by the Benefits Manager
Last Day Worked	Department Benefits Manager Human Resources	For any of the separation transactions, there must a date in this field. The date is the last date an employee was physically working or granted approved leave of pay (vacation, CTO, sick time)

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From (time): [Beginning of the employee's last work day]	Department Benefits Manager Human Resources	For any separation, if the time worked or granted approved leave was for less than a full day, the time (from and to) for the last day work needs to be completed.
To (time): [End of the employee's last work day]	Department Benefits Manager Human Resources	For any separation, if the time worked or granted approved leave was for less than a full day, the time (from and to) for the last day work needs to be completed.
Pay Credit in lump sum Employee running out credits Hold Credits	Benefits Manager Employment Services	This area is be completed by either the Benefits Manager (for retirements) or a Human Resources Manager in Employment Services for all other separation transactions.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Leave of Absence	Only a Human Resources Manager within Employment Services completes this area.	Select the appropriate transactions for the leave request.
LOA Effective Date	Only a Human Resources Manager within Employment Services completes this area.	Enter the Effective Date of the transaction
Payroll Return Date	Only a Human Resources Manager within Employment Services completes this area.	For Full or Partial Leave of Absence, provide the anticipated return date.
Type of Leave	Only a Human Resources Manager within Employment Services completes this area.	Select the appropriate type of Leave. If "Other" please specify.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
New Job Title / Classification	Department – If known	Enter the <b>new</b> classification and working job title for the employee
Range Code	HR Manager	Appropriate Range Code per the salary schedule
New Department	Department – If known	Enter the Department in which the employee will be working in.
Unit	HR Manager	Enter the Bargaining Unit appropriate to the new job classification
Permanent Temporary	Department – If known	Select the appropriate position status
Effective Date	Department – If known	Enter the date that the transaction is effective. Except for separations, all transactions are effective at the beginning of the business day of the effective date

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Appointment End Date	Department – If known	Enter the anticipated appointment end date.
Timebase	Department – If known	Check mark the appropriate timebase: <b>Full Time</b> (40 hours per week) <b>Part Time</b> (enter the percentage of time going to be worked based on 1.0 FTE, less than 40 hours per week) <b>Intermittent Hourly</b> (enter approximately number of hours to be worked each week)
Pay Plan	Department – if known	Select the appropriate pay plan. This is not how many months a temporary employee will be employed. The pay plan determines how the monthly salary is calculated.  If a pay plan other than 12-month is selected, indicate the <b>Months Off</b> .
Salary	Department – if known  Human Resources Manager	Enter either <b>Monthly</b> or <b>Hourly</b> salary.  Enter the <b>Based on/Mon.</b> amount if the employee is working less then full time or the equivalent monthly amount based on the hourly amount. <b>Step</b> is currently used for only Unit 8 employees. Enter the appropriate step number per the salary schedule associated with the monthly salary.
Probationary Code	Human Resources Manager	Select the appropriate code for the transaction and the employee’s current probationary status.
Prob. End Date	Human Resources Manager	If a probation period is required, enter the probationary period end date.
MPP Job Code	Human Resources Manager	Enter the appropriate code. If unknown, check with Compensation Manager
SSI Date	Human Resources Manager	Enter appropriate information. Currently for all units except Unit 8, the SSI is None. For Unit 8 the SSI is one year from the effective date of the transaction.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Eligible for Benefits	Human Resources Manager	Based on the type of appointment and classification, indicate if the employee is eligible for benefits.

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<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Performance Evaluations	Human Resources Manager	Indicate when performance evaluations are to be completed if the employee is serving a probationary period. If no probationary period, indicate if annual performance evaluations are to be completed on the employee.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Degree Information:	Human Resources Manager	<b>FICE Code:</b> School Code (See separate listing for codes) <b>Level:</b> Level of Education (See PIMs manual for listing of levels) <b>Date:</b> Year Highest Degree issued
Ethnic Code	Human Resources Manager	Information obtained from Employee Information Sheet.
License Req'd #:	Human Resources Manager	If the position requires a license, the license number should be in this field. A copy of the license should be obtained for the employee's personnel file.
Code:	Human Resources Manager	Refer to the PIMs manual for the license codes
Expiration Date:	Human Resources Manager	Enter the expiration date of the appropriate license.
Issue Date:	Human Resources Manager	Enter the issue date of the current appropriate license.
Funding Change	Department	If the ETF is for a funding change only, the department should check this section and enter the appropriate Fund, Org ID, Class, and Account.
FLSA Status	Human Resources Manager	Select from the drop down box, Exempt or Non-Exempt

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Process Fingerprints	Human Resources Manager	Indicate if the fingerprints should be processed through the Department of Justice. This should be determined by classification and job assignments.

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<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Other	Department – if known	If the transaction type is not listed somewhere else on the form, check this box.
Effective Date	Department	If the Other box is checked as the transaction type, provide the Effective Date of the transaction.
Transaction:	Department	If the Other box is checked, provide a short description of the type of transaction that is being requested.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Old Position Number	Budget Office	Provide the PIMs position number for the position that the employee is vacating.
New Position Number	Budget Office	Provide the PIMs position number for the new position that the employee is moving to, or if no movement is happening, provide the employee's current position number.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Comments	Department – if necessary	If more information is needed to describe the transaction it should be in this field.
	Human Resources Manager	If the transaction includes an increase in pay, describe in this area how the increase in pay was determined.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Department Manager	Department	Print the name of the MPP of Chair who is responsible for this position. Have that individual sign and date the form.
Dean / Department Manager	Department	Print the name of the Dean or Department Manager. Have that individual sign and date the form.

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President / Provost / Vice President	Department	Indicate the name of the highest level of authorization necessary (based on your organization's practice). Have that individual sign and date the form.
Budget Office	Budget Office	Print the name of the individual in the Budget Office who reviews the form and determines the Fresno State Pos. # and the PIMs Position Number. Have that individual sign and date the form.
Initiated by: HR Manager	Human Resources Manager	The Human Resources Manager who initiates the form or reviews it for accuracy by the department should sign and date the form.
Approved by: HR Manager	Human Resources Manager	The Human Resources Manager (usually the Assistant Director of Human Resources) who has final approval that the form is accurate should sign and date the form.

<b>Field Name</b>	<b>Who Should Complete</b>	<b>What the Contents Should Be</b>
Date Entered:	Employment Services	This is the date that the ETF was entered into the ETF log in Employment Services.
ETF #	Employment Services	ETF # given to this ETF after the ETF is entered into the ETF log.
Date to Letter Desk	Employment Services	The date that a copy of the ETF was given to the desk in Employment Services that generates the employment transaction letters.