

Instructional Student Assistants (ISA) PROCESSING GUIDELINES

Updated: Spring 2008

Sections

- A. Eligibility
- B. Student Application Process
- C. ISA vs. Student Assistants
- D. Processing Student Application & PTF (Department / Program)
 - 1. Application
 - i. Information Verification List
 - ii. Effective Start & End Dates
 - iii. Assigning Work Hours
 - iv. Chair / Unit Administrator Signatures
 - 2. Personal Transaction Form (PTF)
 - i. General Salary Increases
 - 3. Request for Exception
 - 4. Other Important Information
 - i. Summer & Winter Hires
 - ii. Federal Work Study Students
 - iii. Multiple Positions
 - iv. Budget & Enrollment Limits
 - v. Photocopies
- E. Grad Studies Process - Application & PTF
 - 1. Verification of Information on PTF & Application
 - 2. Offer Letter Disbursement
 - 3. Lost / Never Received Letters
- F. Returned Offer Letter
 - 1. Processing Signed Offer Letter
 - 2. Forwarding PTF to Payroll
 - 3. Original Offer Letter Forwarded to Department / Program
 - 4. Entering Students into CMS
- G. ISA Maintenance
 - 1. Revisions to Offer Letter, Application or PTF
 - 2. Time Sheets / Pay Issues
 - 3. ISA Discipline / Termination
 - 4. Student Tracking
 - 5. Student Declines Position
 - 6. Separation PTF
- H. Personnel Transaction Form (PTF) Guidelines

A. Eligibility

Undergraduate Student

1. GPA minimum of **2.5** (2.25 if newly admitted)
2. Not employed by Sacramento State as a full or part time employee
3. Enrolled in at least 6 units, but not more than 15 units (except summer and winter breaks)
 - a. **Open University students are not eligible**
4. International Students holding F1 or J1 visas must be able to secure approval from the Office of Global Education in order to be eligible to work as an ISA.

Graduate Student

1. GPA minimum of **3.0** (2.75 if newly admitted)
2. Not employed by Sacramento State as a full or part time employee
3. Graduate ISAs must be enrolled in at least 4 units, but not more than 12 units. Exception: 500 courses /Culminating Experience Units (except summer and winter breaks)
 - a. **Open University students are not eligible**
4. International Students holding F1 or J1 visas must be able to secure approval from the Office of Global Education in order to be eligible to work as an ISA.

B. Student Application Process

Undergraduate Applicants

- Students fill out the top half of the ISA application (**one application per position**), signs and submits to department / program directly
- International Students holding F1 or J1 visas must have secured approval from the Office of Global Education
- **Federal Work Study Students** – The original FWS Employment Referral form must accompany the ISA application

Graduate Applicants

- Students fill out the top half of the ISA application (one per position), signs and submits to department / program directly
- International Students holding F1 or J1 visas must have secured approval from the Office of Global Education

C. ISA vs. Student Assistant (SA)

Tip: Student Assistants position involves mostly clerical office work and does not include helping grading, preparing materials for course, etc.

Consult the **Classification & Qualification Standards** sheets for more details on the distinguishing duties and responsibilities for Unit 11 positions: Teaching Associate (TA), Graduate Assistant (GA), and Instructional Student Assistant (ISA).

Review Student Employment Policies and Procedures regarding combining Unit 11 positions with Student Assistants.

D. Student Application & PTF (Department / Program)

When selecting applicants, departments / program centers **must verify** that students **meet the minimum qualifications to work as an ISA prior to submitting paperwork to the Office of Graduate Studies.**

Departments / Programs must submit the following for each ISA hired:

1. Application
2. PTF
3. Pertinent Paperwork (e.g. resume or exception request)

a. Application

1. Information Verification List

- **Multiple Positions** - Note if students are working other positions on campus
- **Student Information** - Verify any changes of address, phone number, or name (change on PTF)
- Student Signature
- **Federal Work Study** - Attach FWS grant form, ***if applicable***
- **Verifying Residency** - It is recommended that departments / program units verify the residency status of **all** students.
 - See instructions on how to view residency status on CMS.
- **International Students** – The Office of Global Education must verify that ISA applicants are eligible to work on campus **every** semester.

2. Effective Start & End Dates (ISAs Only!) – Each department / program has the flexibility to hire students for as many days or weeks, as needed, within the set payroll dates (see Processing Time Line for dates).

3. Assigning Work Hours

- Students must not work more than **20 hours per week** (including FWS positions) as ISA students during the fall or spring semesters.

There are **three** different ways to assigned ISA hours (as set forth by the Office of Human Resources):

- **Range of Hours** – The range may only have a 3 – 5 hour difference between the number of hours assigned (e.g. 17 – 20, 10 – 15, 5 – 9)
NOTE: A department / program center has to schedule a student to work for at least the minimum of hours assigned in the range.
- **Set Number of Hours per Week** - Departments may indicate a set number of hours (e.g. 5, 9, 20) that a student will work every week.

- **Set Number of Hours per Semester** - Departments may assign a set number of hours for the entire semester (e.g. 200, 100,145) – Maximum of 280 per semester.

NOTE: Students must work all of the hours assigned by a department / program center by the end date noted on the PTF (call the Office of Graduate Studies for exceptions).

4. Chair / Unit Administrator Signatures - ISA applications must be signed before being submitted.

b. Personal Transaction Form (PTF) - Each application must be accompanied by a completed application. See section “H” for more details.

General Salary Increase – Review the UAW / CSU Collective Bargaining Agreement (page 32) for details.

NOTE: Verify that the name and address match the ISA application.

c. Request for Exception

Requests for exemptions must be submitted in writing by the department chair or the director of a program. Exemptions will be granted on a case by case basis and the final decision will be left up to the discretion of the Office of Graduate Studies. ***Students are eligible only for a one-time exemption.***

Submit requests for exemption to the Office of Graduate Studies along with the PTF and application.

Types of Exemptions:

Exceeding maximum unit load – Student must possess a strong overall GPA. Departments shall provide a rationale for exceeding maximum unit load. **Note:** Indicate if the student’s major requires that they take excess units.

Below minimum unit load – Submit reason why unit load is below the minimum (e.g. student’s last units for degree). **Note:** Students enrolled in Continuous Enrollment units do not require an exemption request.

Low GPA – Student must have a history of maintaining a satisfactory overall GPA and must be taking satisfactory progress toward degree completion.

Low GPA / Exceeds Unit Load - Exemption will probably not be granted

Low GPA / Below Unit Minimum – Student must have a history of maintaining satisfactory GPA in the past. The department / program must submit the reason why the unit load is below the minimum (e.g. student’s last units for degree)

d. Other Important Information

1. Summer & Winter Hires

- **Enrollment** - Students are not required to be enrolled in courses during breaks.
- **Summer Bridge Program** –ISAs, TAs, or GAs are not part of Summer Bridge.
- Only one PTF and ISA application is required for the entire summer.

2. Federal Work Study Students

- Processing - Please forward the original FWS Employment Referral directly to our offices (not to Payroll) along with an ISA application and PTF (not an SAPTF). When the student returns their signed offer letter, we will forward the FWS Employment Referral form and PTF to Payroll.
- Consult the Student Employment Policies & Procedures manual for additional information regarding FWS students.
- Federal Work Study Students cannot work more than 20 hours a week while enrolled in courses.

3. Multiple Positions - A separate application (copies accepted) and original PTF must be submitted for each position being hired (no more that a combined total of 20 hours per week).

4. Budget & Enrollment Limits - Offers of appointment for ISAs may be ***conditionally based*** on budget and enrollment. This does not apply to Graduate Assistants or Teaching Associates.

5. Photocopies - Departments / program centers are required to submit 3 photocopies of the original PTF, ISA application and FWS form (if applicable) to the Office of Graduate Studies (zip: 6112) for each position. **DO NOT STAPLE COPIES TOGETHER!**

E - Graduate Studies Process

Ⓜ **Students may not work or be entered into CMS until they have returned their signed offer letter to the Office of Graduate Studies**

Application & PTF

a. Verification of Application & PTF Information

- NOTE: PTF / applications with missing copies, incomplete or incorrect information will be returned to the department / program center. Re-submitted applications will require an additional 10 days to process.

b. Offer Letter Disbursement

- It will take approximately **ten (10)** working days to generate an offer letter for each position.
- Departments / programs units will be notified via email when the offer letter is ready.
- Departments / programs units have a choice of either:
 - Picking up the letters for disbursement
 - Notify the student, so that they may pick up the letter in person
 - Having our office mail the offer letter directly to the student's home address

NOTE: Once the offer letter has left the Office of Graduate Studies the department / program center may not open or alter the letter in any way.

c. **Lost / Never Received Offer letters** - Please contact the Office of Graduate Studies ASAP.

F. Offer Letter

1. **The original signed offer letter must be returned directly to the Office of Graduate Studies for processing.** *Faxes or photocopies will not be accepted.*

2. **Graduate Studies processes the ORIGINAL offer letter**

3. **PTF is Forwarded to Payroll** - The PTF will not be sent to Payroll until the signed offer letter is received by the Office of Graduate Studies, hence delaying pay.

▪ A student may start their position within **24-48 hours** after the signed letter is returned to the Office of Graduate Studies **AND** the student has gone to the Payroll Office (accompanied by a copy of the offer letter, which is included with the original) to complete the following:

1. New hire paperwork (
2. Make deduction changes to W2 form
3. Changes to address or name
4. Complete direct deposit paperwork (if applicable)

4. **Original Offer Letter Forwarded to Department / Program** - The Office of Graduate Studies will forward the signed original offer letter to the hiring department / program center, which needs to be filed in a separate 'employee' file. **Please note that files must be kept by the department / program center for three (3) years or seven (7) if the employee was terminated.**

5. **Entering Students into CMS** - The department / program may now enter the student into CMS

G. ISA Maintenance

a. Revisions to Offer Letter / Application / PTF

Starting in 2008, departments and programs will be required to submit a Revisions Form to the Office of Graduate Studies for any revisions made to the original PTF and / or application.

▪ **NOTE:** All changes must follow the Collective Bargaining Agreement guidelines**

☞ If an **offer letter has not been issued** - Contact the Office of Graduate Studies immediately, so that the PTF and application are pulled from processing. It is important to notify a student of any updates. Submit a Revision Form.

☞ If an **offer letter has been issued**:

- Student declines the offer letter, writes in the new hours or pay, signs and returns it to the department / program center.
- The department / program center submits a Revision Form along with the original declined offer letter.
- A revised offer letter will be issued to the student within 10 days.

Change of Position - Please contact the Office of Graduate Studies.

b. Time Sheets & Pay Issues

Time Sheets – ISAs are intermittent employees, so they will need to provide an Absence & Excess Hours Worked Report to their department / program center for the hours worked each month. Keep a copy in the student ISA file.

Student has not been paid? - Did the student receive AND return their original offer letter to Graduate Studies? If no, contact the Office of Graduate Studies.

c. ISA Discipline / Termination

Please review Article 6 (Discipline) of the Collective Bargaining Agreement (page 10). Contact Julie Thue at x8-5579, if you have questions concerning terminating an ISA or any other Unit 11 employee.

d. Student Tracking

- The Office of Graduate Studies will email each department / program unit representative the names of students who have an offer letter ready for pick up.
- The **original offer letter** *will be sent to the department / program unit* after it has been processed by the Office of Graduate Studies.
- An email will be sent after the semester has started with the names of all the applications received
- **Files must be kept by the department / program center for three (3) years or seven (7) if the employee was terminated.**

e. Student Declines a Position

- If a student decides to decline a position, they are still **required to sign and return the offer letter** to the Office of Graduate Studies. The offer letter allows a student to accept or decline a position.
- The original offer letter will be forwarded to the department / program center.

f. Separation PTF

Separation PTFs are only required when a student:

- Leaves Sacramento State completely **before** the end of the term
- Leaves a position **prior** to the end date noted on original PTF
- Will no longer be working for a department / program center (terminated)

For more detailed information regarding the Collective Bargaining Agreement, please visit the Chancellor's website at:
http://www.calstate.edu/LaborRel/Contracts_HTML/CBA_Contract/index.shtml

H. Personnel Transaction Forms (PTF) Guidelines

Instructional Student Assistants

FIRST SECTION

Date - Enter date that PTF is prepared

Line 1 - **Empl ID (Employee ID)**

Current Employee - Enter 9-digit Empl ID or the Empl ID of a former employee
New Employee - Leave this blank. PeopleSoft will assign an Empl ID for a new employee when the new employee is processed by Payroll Services or FSA.

Line 2 - **Name**

- ▶ Check prefix box (Mr., Ms., or Dr.)
- ▶ Enter employee's last name, first name and middle initial. Verify any changes.
- ▶ **NOTE:** Please make sure that the name on the application matches the PTF.

Line 3 - **Address**

- ▶ Enter the employee's address and phone number. Verify any changes.
- ▶ The employee must report address changes directly to Payroll Services.
- ▶ **NOTE:** Confirm that the address on the application matches with PTF.

Line 4 - **Employee Action**

- ▶ NEW vs. RE-APPOINTMENT?
 - **New appointment**
 - Students new to the position.
 - If a student switches from one position to another, then they are considered new hires.
 - *Students who have **not** been employed in a paid position at CSUS for **more than a year (12 months)**. Call the Payroll Office for more information.*
 - **Re-appointment** - Students who have previously worked the exact same position within the same department / program center in the past 12 month. No changes.

Line 5 - **Explanation or Remarks**

- ▶ Provide details for all transactions (if necessary)

Line 6 - **Position Type** (Check a box)

- ▶ **New** - A new position was created for this appointment
- ▶ **Funding Change** - Change in funding for an existing position
- ▶ **Pool** - Temporary position which allows multiple hires in a department
- ▶ **Position Change** - Change to an existing position

- ▶ **Replacement** - A position exists for this appointment. Enter the name of the person being replaced

SECTION A

General Information

Line 7 Old / Unchanged Information (Re-Appointments Only!)

- ▶ Enter **ALL** of the following information:
 - Pay Title [Instructional Student Assistant]
 - Department Work Location [Dept / Program center]
 - Campus Zip

Line 8 New Appointments / Information

- ▶ Enter **ALL** of the following information:
 - Pay Title [Instructional Student Assistant]
 - Department Work Location [Dept / Program center]
 - Campus Zip

Position Information

The following lines will address the information needed for each appointment:

- See line 9 & 12 for re-appointment information
- See line 10, 11 & 12 for new hire information

Line 9 Old / Unchanged Information (Re-Appointments Only!) – Must be completed, if applicable.

- ▶ **CMS Position Number** – Enter existing 8-digit CMS position number
- ▶ **Dept ID** - Department where position is paid.
- ▶ **Job Code** (*codes may be different during the summer*)
 - **Non-Work Study Students:** 1150
 - **Work Study Students:** 1151
- Empl Rec** - Employee's record number for the position or 0 (zero)
 - **Note:** If an employee has two or more concurrent positions, they will have multiple employee record numbers in CMS.
- ▶ **CBID** – Enter code number: **11**
- ▶ **End Date**
 - Leave cell on line 9 blank
 - Enter **ACTUAL** start and end date on line 10 cells
- ▶ **Grade** - Enter code number: **0**
- ▶ **Step** - Enter code number: **0**
- ▶ **Time Base** – Enter ' **INT** ' (for intermittent)
- ▶ **Salary** (hourly) - See Unit 11 Salary Schedule

Line 10 New Appointments / Information – Must be completed, if applicable.

- ▶ **CMS Position Number**
 - Enter the 8-digit position number provided by the Budget Office or new appointment

- An existing number from spring semester, if there are no changes in funding source
- ▶ **Dept ID** - Department where position is paid
- ▶ **Job Code** (*codes may be different during the summer*)
 - **Non-Work Study Students:** 1150
 - **Work Study Students:** 1151
- ▶ **Empl Rec**
 - Enter the employee's record number for the position.
 - If an employee has **two or more concurrent positions**, they will have multiple employee record numbers in CMS.
- ▶ **CBID** - Enter code number: **11**
- ▶ **Effective Date** – Enter starting date [**See Special Considerations**]
- ▶ **End Date** – Enter end date [**See Special Considerations**]
- ▶ **Grade** - Enter code number: **0**
- ▶ **Step** - Enter code number: **0**
- ▶ **Time Base** – Enter ' **INT** ' (for intermittent)
- ▶ **Salary (hourly)** - See Unit 11 Salary Schedule

Line 11 - New Position Fund Source - Must be completed
CMS Fund—5-digit number; e.g., G04DS

Line 12 - Reports to: Fill in the following information (**DO NOT LEAVE BLANK!**)

- ▶ CMS position number
- ▶ Graduate Coordinator
- ▶ Department name
- ▶ Job code
- ▶ Supervisor of this position (used for new positions or reorganization only)

SECTION B

Line 21 - Base Pay - Enter appropriate base pay.
Note: Refer to most recent unit 11 Salary Schedule.

SECTION E

Approval Signatures – The signatures for both the department and program center will be required (if applicable).

Updated: November 24, 2008