

HR 101 FORM GUIDELINES

For actions involving Additional/Concurrent Assignment (e.g. Cal Poly Auxiliary or other CSU Employee) use [HR 101-S](#) Form. Rehired Annuitant Appointment use [HR 101-R](#) Form. Position Pool ID Change Only use [Position Funding Form](#).

Before completing the HR 101 form, please refer to the 'HR 101 Form Data' Dashboard to ensure the most current employment information is populated in Part I, Part III, and Part IV as appropriate. Navigation to the dashboard is as follows:

- My Cal Poly Portal > PolyData Dashboards > Dashboards Drop-down Menu > Human Resources (State) > Job/Position Information > HR 101 Form Data (tab).
- Within the HR 101 Form Data Prompt, unselect the prepopulated zeros in the 'Preferred Report Name' field if applicable. Enter the employee's 'Emplid' and click apply to begin the search.

PART I: EMPLOYEE INFORMATION		
Field	Description	Example
Employee's Name	Employee's or Selected Applicant's Name	Smith, John Ramos
Employee ID	Current employee: Enter nine-digit Emplid New Employee or Applicant: Leave blank	000001234
Recruitment #	The 6-digit Cal Poly Jobs requisition number, if action is as a result of a recruitment	#200108

PART II: ACTION REQUESTED	
Complete Position Funding Form for Actions Below:	
Appointment – No Ending Date	Initial hire to a probationary/permanent or MPP regular position (no ending date) as a result of recruitment.
Temporary Appointment – with Ending Date – following a recruitment Is the position expected to work 130 hours /month (30 hours/week)? Position is funded by non-reoccurring grants or contracts	Appointment to a temporary position as a result of recruitment. Note: CSUEU Hourly/Intermittent positions shall not exceed 1000 hours in any given fiscal year. Contact Human Resources for more information. Check yes or no to indicate whether there is reasonable information available to confirm the position will work 130 hours month/30 hours week. Check if the position if funded by non-reoccurring grants or contracts and explain the funding type in the "Explanation of Action" section. Note: Some collective bargaining agreements require the granting of permanent status to a temporary employee who has been reappointed for a series of consecutive years. Contact Human Resources for more information.
Emergency Appointment Is the position expected to work 130 hours /month (30 hours/week) Position is funded by non-reoccurring grants or contracts	Initial hire, <i>without recruitment</i> , to a short-term (60 - 90 days depending on applicable collective bargaining contract) appointment as a result of an unanticipated "emergency" need. Check Yes or No to indicate whether there is reasonable information available to confirm the position will work 130 hours a month/30 hours week. Check if the position if funded by non-reoccurring grants or contracts and explain the funding type in the "Explanation of Action" section.
Promotion – following a recruitment Credit temporary reassignment service to probationary period	Movement to a higher job classification or skill level with a higher salary range as a result of recruitment. If an employee was temporarily reassigned to a position to prevent the stoppage of public business, and is later selected as the most qualified candidate following a recruitment, the crediting of the temporary time served may be elected.

Reassignment	“Lateral transfer” of a current employee to a position in the same job classification and/or skill level – OR - temporary movement to a higher level assignment without a recruitment.									
Demotion	Movement to a lower job classification or skill level with a lower salary range.									
Deptid Change	Department ID number change only. If the change is for budgetary/labor cost distribution purposes only, form requires Head of Department signature only.									
Position Funding Form Not Required For Actions Below:										
Change from Temporary to Probationary/Permanent Position	Movement of a temporary employee, who was hired through a recruitment, to a probationary or permanent position. A current satisfactory performance evaluation is required for this action.									
Credit temporary service to probationary period	A department may request the temporary service be credited toward the probationary period – contact Human Resources for specific contractual requirements.									
Early Reinstatement from Full/Partial Leave	Return of an employee from a leave of absence prior to the date initially approved.									
Reclassification – Permanent/Probationary	A significant, permanent change in duties that results in a change in job classification or skill level (in-class progression); may be to a higher, lower, or equivalent level. Departments may require or waive the probationary period at the new classification/skill level; contact Human Resources for guidance.									
Salary Rate Change	Change in salary amount only, for example, an in-range progression. For a stipend or bonus, select “Other” option. For supplemental compensation as it relates to a job offer, see the “Recruitment Actions Only” section in Part IV.									
Time Base Change – Permanent or Temporary	A permanent increase or decrease in time base. Do not use the HR 101 Form for an employee-initiated temporary reduction in time base; this action is processed as a “temporary partial leave without pay” via the HR 190 Form. The HR190 Form should be completed for all partial and full-time leaves without pay and reviewed against operational needs prior to an extension.									
Title Change	Update working Title of MPP employee. Staff titles reflect the CSU classification title.									
Reports To Change	Change only the person to whom the employee reports, and who approves the employee’s absences in Absence Management (requires Head of Department signature only on HR101).									
Unit Change	Paycheck delivery location change only (requires Head of Department signature only on HR101).									
Other	Any action not included above. For Bonus and Stipend awards, indicate account chartfield. Provide additional details in “Explanation of Action” section For resignations, complete the HR-191 Form.									
Pay Plan Change	Movement of an employee to a different pay plan, for example, to/from the 10/12, 11/12, or 12/12 pay plan. Such changes will result in a salary change. For 10/12 and 11/12 employees only. Complete this section only if the action is effective past the beginning of the annual pay plan cycle and requires mid-year pay plan change(s). Contact Human Resources for assistance.									
	<table border="1"> <tr> <td>Pay Plan</td> <td>12/12</td> <td>10/12</td> </tr> <tr> <td>Eff Date</td> <td>1/1/2012</td> <td>8/31//2012</td> </tr> <tr> <td>Salary</td> <td>\$3,600</td> <td>\$3,000</td> </tr> </table>	Pay Plan	12/12	10/12	Eff Date	1/1/2012	8/31//2012	Salary	\$3,600	\$3,000
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Eff Date	1/1/2012	8/31//2012								
Salary	\$3,600	\$3,000								

PART III: COMPLETE FOR ALL ACTIONS		
Field	Description	Example
Action Effective Date	The date the requested action/assignment will begin.	7/1/2001
Ending Date	The last date of the temporary action or assignment.	6/30/2002

Supervisor	The employee's/applicant's immediate supervisor.	Stephanie Smith
Manager	The employee's/applicant's immediate manager (MPP only).	Alex Doe
Reports To	Person to whom the employee reports, and who approves the employee's absences in Absence Management. Must be an MPP employee or Academic Department Head/Chair.	Maureen Gonzalez
Reports To Position #	Position number of the designated Reports To person above.	00007090
Explanation of Action	Brief description of the requested action.	John is returning early from Partial Leave.

PART IV: POSITION/ASSIGNMENT INFORMATION		
<p>FROM: Using the HR 101 Form Data Dashboard, complete this section with a current employee's position/assignment information ONLY. Leave section blank if new employee's initial hire.</p> <p>HR101 Form Data Dashboard Navigation:</p> <ul style="list-style-type: none"> • My Cal Poly Portal > PolyData Dashboards > Dashboards Drop-down Menu > Human Resources (State) > Job/Position Information > HR 101 Form Data (tab). • Within the HR 101 Form Data Prompt, unselect the prepopulated zeros in the 'Preferred Report Name' field if applicable. Enter the employee's 'Emplid' and click apply to 	<p>TO: Complete this section with:</p> <ul style="list-style-type: none"> • A new employee's <i>initial</i> position/assignment <i>OR</i> • Proposed change(s) to a current employee's position/assignment. Leave field blank if information does not differ from the current assignment ("From" section). 	
Field	Description	Example
Position #	The 8-digit PeopleSoft (PS) position number	00001475
Position Pool ID	The 3-digit number that identifies the charge fund for the position. If position funding is split between two or more charge funds, contact the Budget Office for instructions.	100
Unit	The 3-digit code for the paycheck delivery Location	287
College/Division	College or Division name	College of Engineering
Working Title	MPP working title. Complete for MPP positions only. Staff titles reflect the CSU classification title.	Accounting Manager
Department	Department name	Human Resources
Department ID	The 6-digit Department code	115200
Job Classification	The CSU classification title – see CSU Salary Schedule	Network Analyst
Job Code	The 4-digit CSU Class code – see CSU Salary Schedule	0430
Grade/Range	Classification skill level, if applicable – see CSU Salary Schedule	Career
Grade/Range Code	The 1-digit CSU range code – see CSU Salary Schedule	2
FTE/Time Base – 0.0 to 1.0	Based on full-time equivalent of 1.0	<ul style="list-style-type: none"> • 0.0 (hourly) • 0.5 (half-time) • 1.0 (full-time)
Month(s) off	Specify month(s) off with pay for 10/12 and 11/12 pay plans only.	July and August (10/12) August (11/12)
FT Monthly Salary Rate	The monthly base salary – see CSU Salary Schedule .	\$2,500

Actual Salary Rate	<ul style="list-style-type: none"> If hourly position, enter hourly rate of pay (FT monthly rate ÷ 173.33) If part-time salaried position, enter prorated monthly rate of pay adjusted by time base (FT monthly rate x time base) 	<ul style="list-style-type: none"> Hourly (0.0) = 14.42/hour Part-time (.5) = 1,250/month
Recruitment Actions Only – Approved Salary Range:	Enter the minimum and maximum FT salary rates that may be offered to the selected candidate	From: \$3,000 To: \$3,500
Drug Testing	Check box as appropriate or if required	
Fingerprinting/Background checks	Required for all new hires, current employees in positions for which background checks are required by law, and current employees under voluntary consideration for sensitive positions for which background checks are required.	
CSU Vacation Transfer	When hiring an employee from another CSU, the employee may negotiate the transferring of vacation credits at the time a job offer is made. It is the department's prerogative to accept this liability and how many hours. The Employee Data Transfer 612 Form (available on Payroll's website), is used to administratively certify leave credits from each campus' Payroll office. The employee must initiate this process with their departing agency.	
License(s)/Certificate(s)	As required for the classification per the CSU Classification and Qualification Standards (e.g. locksmith license) or the position (e.g. drivers' license).	
Recruitment Bonus	Some collective bargaining agreements allow for a recruitment bonus. MPP recruitment bonuses must be from non-general funds. Indicate the dollar amount and account chartfield bonus should be paid from.	
Reimbursed Moving Expenses	In accordance with State policy, a department may authorize reimbursement of a new employee's relocation/moving costs. Used primarily for MPP and hard-to-hire positions. If checked, enter authorized maximum amount to be reimbursed, for example, \$5,000. Refer to the Fiscal Services website for additional information. Note, most moving and relocation expense reimbursements are considered taxable income to the employee.	
MPP Supplemental Compensation	Requires Human Resources to work directly with the CSU Chancellor's Office to receive written approval before supplemental compensation can become part of the MPP job offer. Enter non-state account chartfield and indicate if compensation is for a monthly car allowance and amount, temporary housing allowance amount and duration, and/or other types of supplemental compensation for consideration and approval.	

SIGNATURES/APPROVALS

Complete the names, titles, and signatures of individuals authorized to approve the requested action, as instructed below.	
HR 101 Completed by	The individual who completed the HR 101
Budget Specialist	Complete for all requested actions
Head of Department	Complete for all requested actions
Dean/Division Head	Complete for all requested actions, except for "Deptid," "Reports To," or "Unit"-only changes.
Provost	Complete for all requested actions from academic departments, except for "Deptid," "Reports To," or "Unit"-only changes.