TAE Reviewer: Approving, Deleting, or Pushing Back TAE appointments

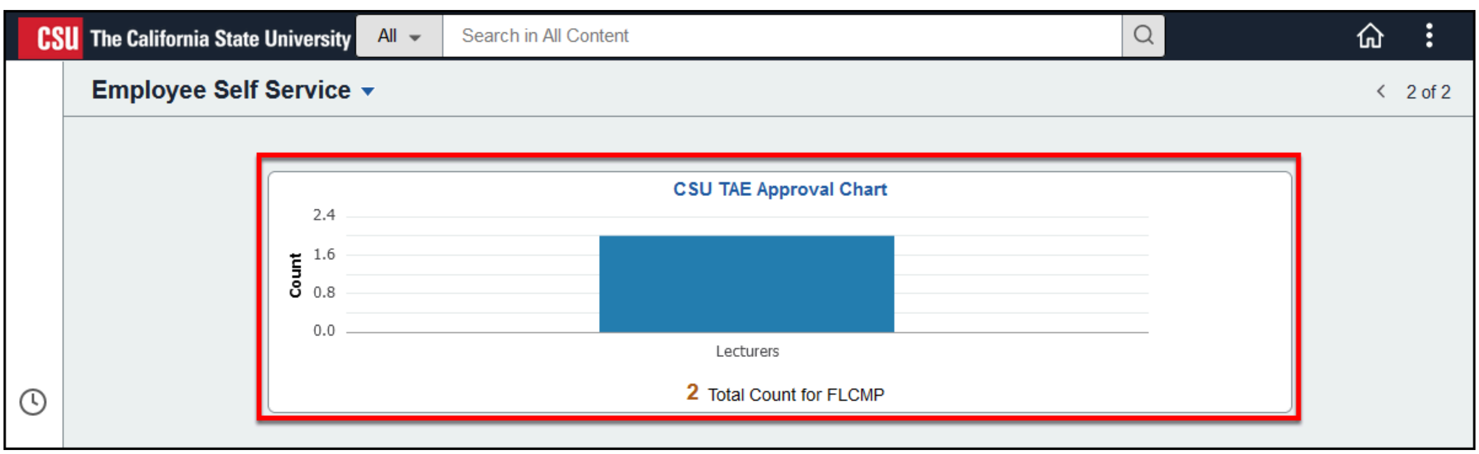
This article covers how authorized TAE Reviewers can approve, delete, or push back a Temporary Academic Employment (TAE) appointment.

1. Log in to the campus portal and click Employee Homepage in the Titan Online widget.

[View detailed instructions on accessing Employee Homepage.]

2. Click on the CSU TAE Approval Chart.

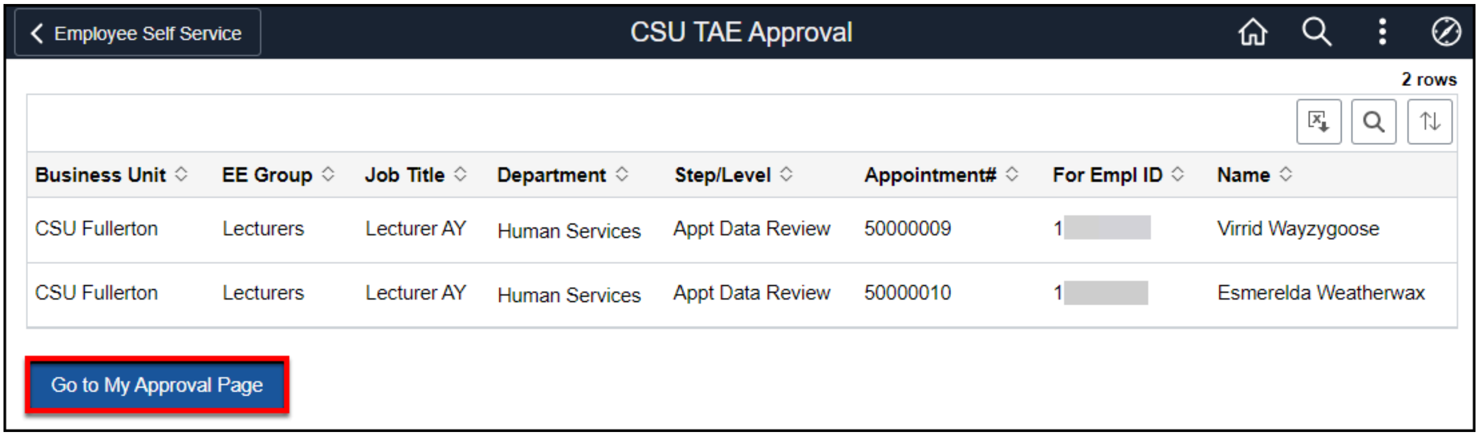
Alternatively, you can navigate using the Nav Bar to: CSU Temp Academic Employment > CSU TAE Approval Workflow > CSU TAE My Approval page.



You will see the number and type of TAE appointments awaiting your approval.

3. A list of the TAE appointments to be approved appears.

Click Go to My Approval Page.

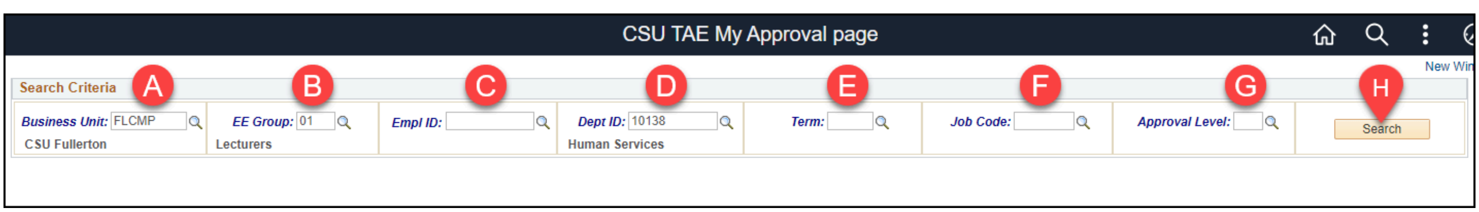


Business Unit	EE Group	Job Title	Department	Step/Level	Appointment#	For Empl ID	Name
CSU Fullerton	Lecturers	Lecturer AY	Human Services	Appt Data Review	50000009	1	Virrid Wayzygoose
CSU Fullerton	Lecturers	Lecturer AY	Human Services	Appt Data Review	50000010	1	Esmerelda Weatherwax

4. The CSU My Approval page opens in a new tab. Enter search criteria to look up one or more appointments to review. You can enter multiple fields to narrow down your search results. Then click Search.

You must enter **FLCMP** as the Business Unit **and** select an EE Group.

Currently you are unable to view appointments for brand new faculty (Person of Interest/POI employee type) by entering their Empl ID. However, if you search by department, the appointments will appear.

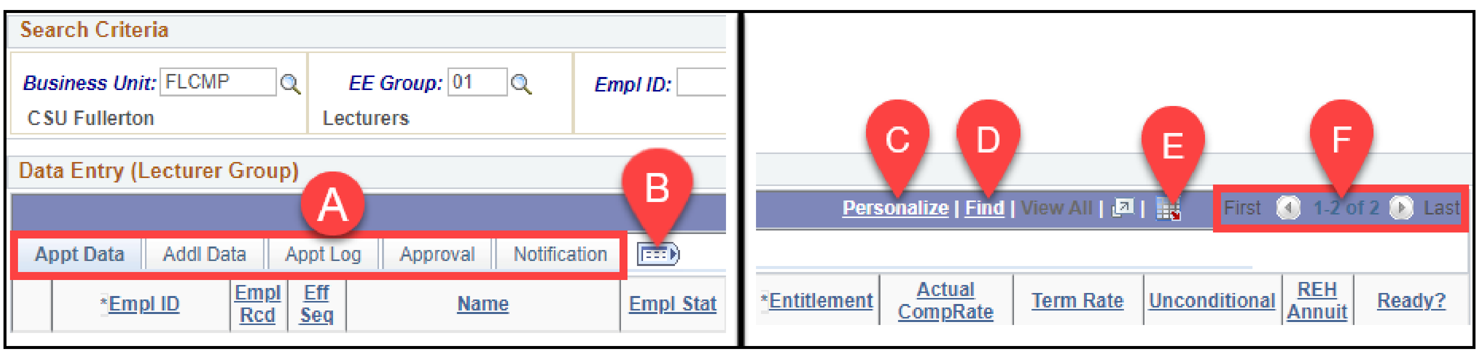


A. **REQUIRED**: Enter **FLCMP** as the Business Unit. This is a required field, do not remove it.

B. **REQUIRED**: Type in the EE Group or use the magnifying glass to look up an EE group to narrow the results to a particular appointment type.
C. Optional: Enter the Empl ID (CHRS ID) of the specific faculty whose appointment you want to review/approve.
D. Optional: Enter a specific Dept ID to see only appointments for a specific department. If you leave this field blank, you will see faculty in all department IDs that you have access to view.
E. Optional: Select a specific Term (e.g., 2237, 2243, etc.) to view only appointments for the selected term.
F. Optional: Select a specific Job Code to view only appointments with that job code.
G. Optional: Select a specific Approval Level to view only appointments at that approval level.
H. Click **Search** when you have entered all of your criteria.

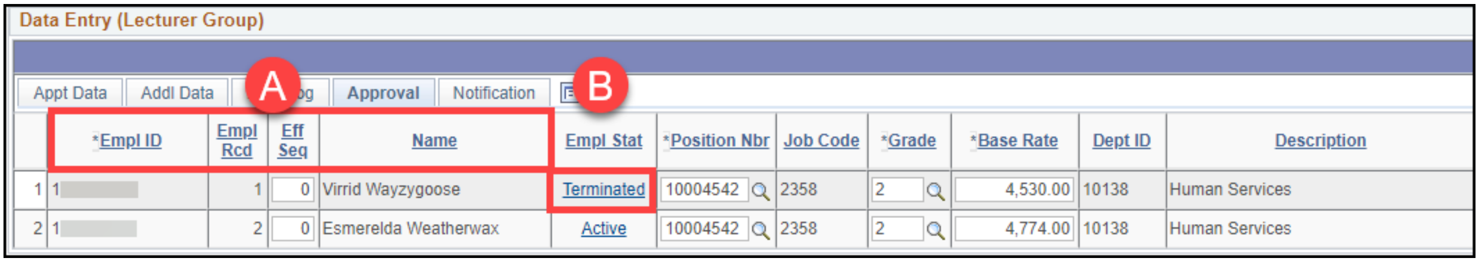
5. Use the tools below to view additional information, find specific information, or personalize your view.

> Note you can also click on a column heading to sort the search results by that field.



A. Click on a tab to view additional information in the search results.
B. Click on the view all columns tab to display all of the available information in the search results.
C. Click **Personalize** to choose which columns you want to include in the search results.
D. Click **Find** to search for a specific employee in the search results. This will bring the specific employee to the top of your search results.
E. Click the download to Excel button to export the results to Excel.
F. Use the navigation arrows to navigate through the pages of results.

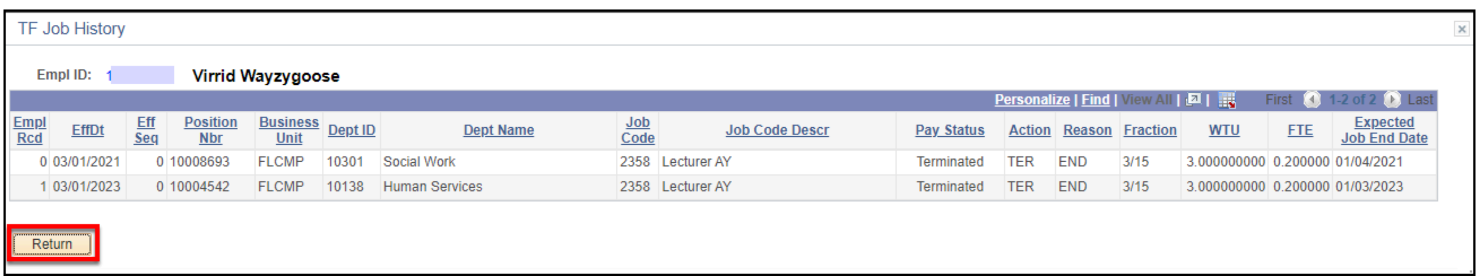
6. Review the employee's information and then click on the Empl Stat hyperlink to review the employee's job history.



	*Empl ID	Empl Rcd	Eff Seq	Name	Empl Stat	*Position Nbr	Job Code	*Grade	*Base Rate	Dept ID	Description
1	1	1	0	Virrid Wayzygoose	Terminated	10004542	2358	2	4,530.00	10138	Human Services
2	1	2	0	Esmerelda Weatherwax	Active	10004542	2358	2	4,774.00	10138	Human Services

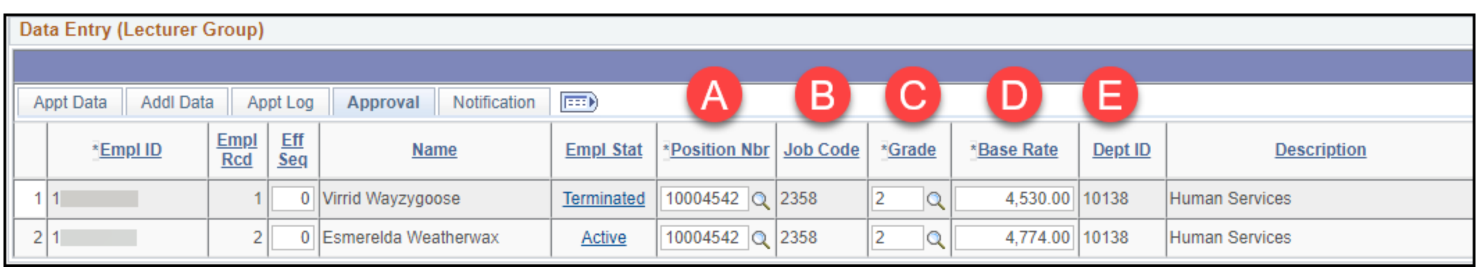
A. Review the employee's information including the EmplID (CHRS ID), Empl Rcd (Employee Record Number), Eff Seq (Effective Sequence), and Name.
B. **RECOMMENDED**: click on the hyperlink in the Empl Stat column for an employee to view that employee's job history, including in other CSUF departments and other CSU campuses as those campuses roll out CHRS.

6.1. You will see the employee's entire job history at CSUF, and as other CSU campuses implement CHRS, positions at other CSU campuses. Click Return when you are finished reviewing the information.



Empl Rcd	EffDt	Eff Seq	Position Nbr	Business Unit	Dept ID	Dept Name	Job Code	Job Code Descr	Pay Status	Action	Reason	Fraction	WTU	FTE	Expected Job End Date
0	03/01/2021	0	10008693	FLCMP	10301	Social Work	2358	Lecturer AY	Terminated	TER	END	3/15	3.000000000	0.200000	01/04/2021
1	03/01/2023	0	10004542	FLCMP	10138	Human Services	2358	Lecturer AY	Terminated	TER	END	3/15	3.000000000	0.200000	01/03/2023

7. Review the employee's position information.



	*Empl ID	Empl Rcd	Eff Seq	Name	Empl Stat	*Position Nbr	Job Code	*Grade	*Base Rate	Dept ID	Description
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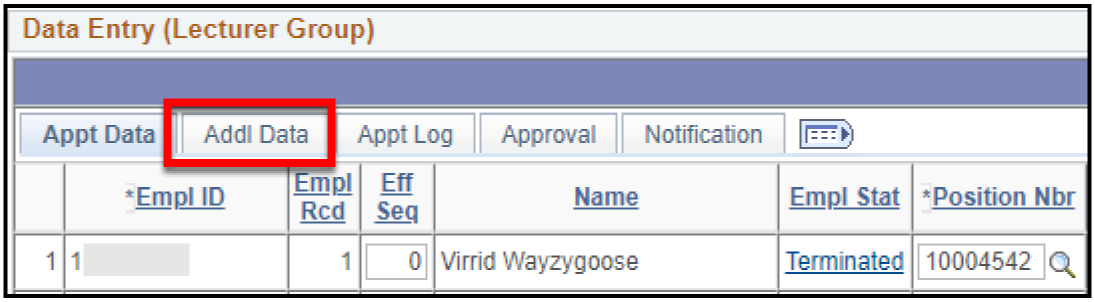
2	1	2	0	Esmerelda Weatherwax	Active	10004542	2358	2	4,774.00	10138	Human Services

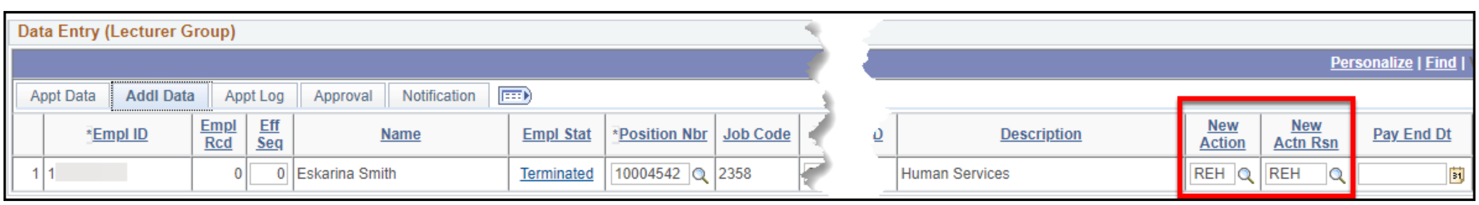
A. Verify that the Position Number is correct for the employee.
B. Verify the Job Code for the employee.
C. Verify the Salary Grade for the employee.
D. Verify the Base Rate for the employee.
E. Verify the department is correct for the employee's appointment.

8. Click Addl Data to review the action codes.



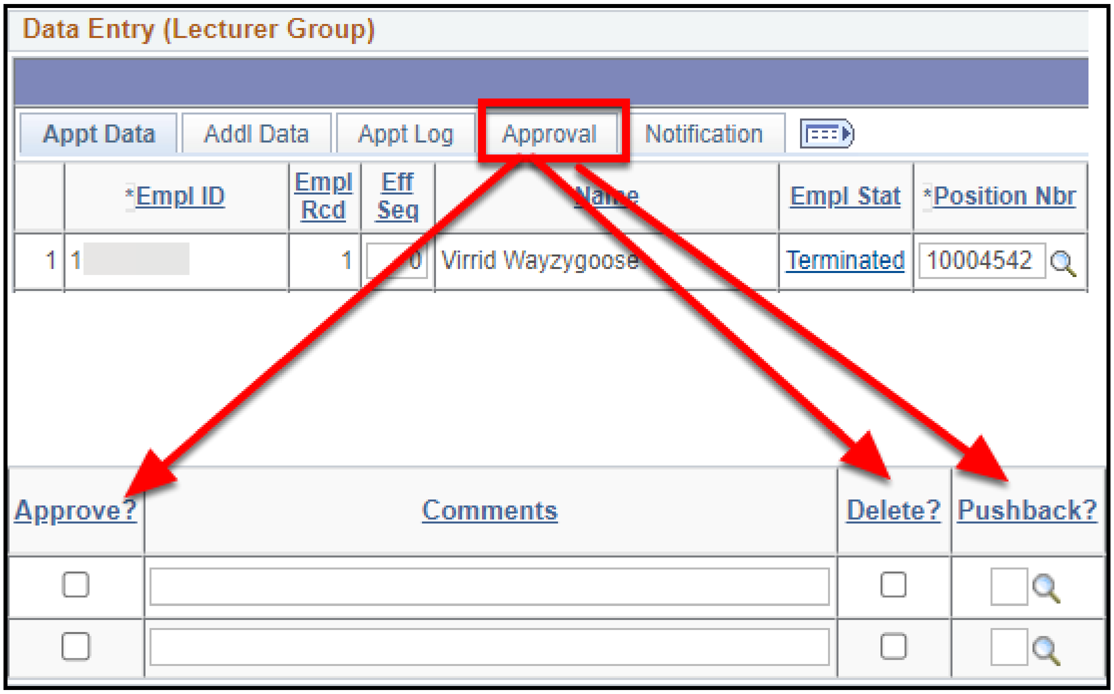
9. Check the New Action and New Action Reason fields and adjust if they are incorrect for the employee.

> Review the **Action Reason Summary** document on the [Academic HR Resources page]for more details about which New Action and New Action Reason would be appropriate.



In the example above, the REH/REH action/reason are appropriate for this employee as their Empl Stat is Terminated.

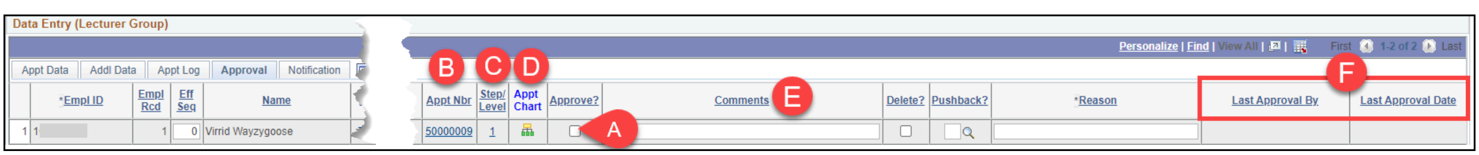
10. To approve, delete, or push back one or more appointments, click on the Approval tab above the search results.



What do you want to do?

Approve one or more appointments

1. To approve an appointment, place a checkmark in the Approve? column. Optional: add Comments and review other fields on the Approval tab.

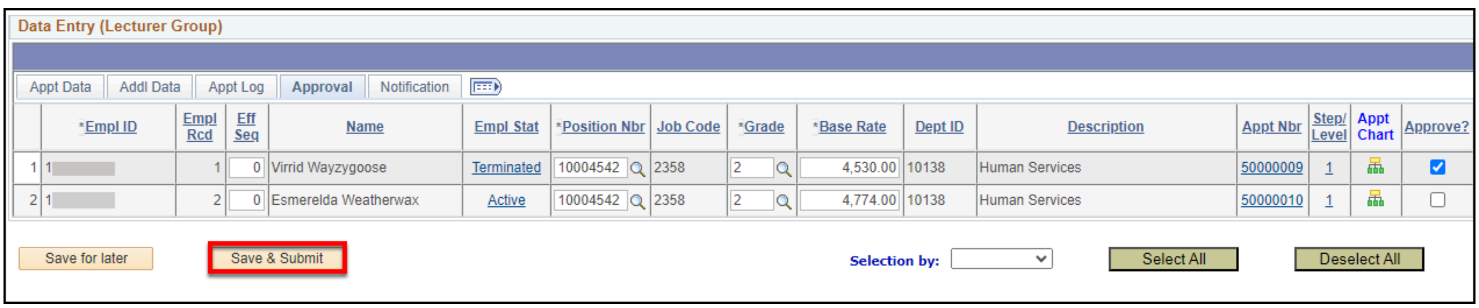


A. Place a checkmark in the Approved? column to mark this appointment as approved.
B. Appt Nbr = An internal number that is related to the TAE approval workflow.

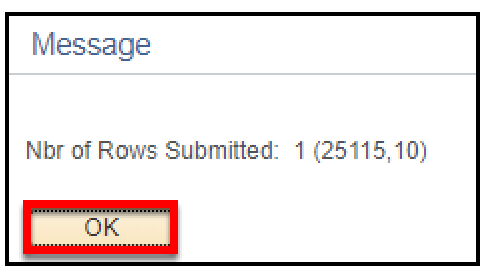
C. Step/Level = The current step number in the workflow.
D. Appt Chart = Shows the different steps in the approval workflow, where the current appointment is in the workflow, and the names of people who are authorized to approve at each step.
E. Comments are optional for approvals, but you can enter one if you wish.
F. Last Approved By and Last Approval Date will show the Empl ID (CHRS ID) of the last person who approved this appointment and the date they approved it (if applicable).

2. Click Save & Submit to send all of the appointments marked as Approved to the next step in the approval workflow.

You do not need to approve all appointments at once.



3. You will see a window indicating if there are any rows with errors and how many rows were successfully saved or submitted without errors. Click OK.



Next Steps

[The appropriate MPP/Administrator will need to review and approve the appointment.]

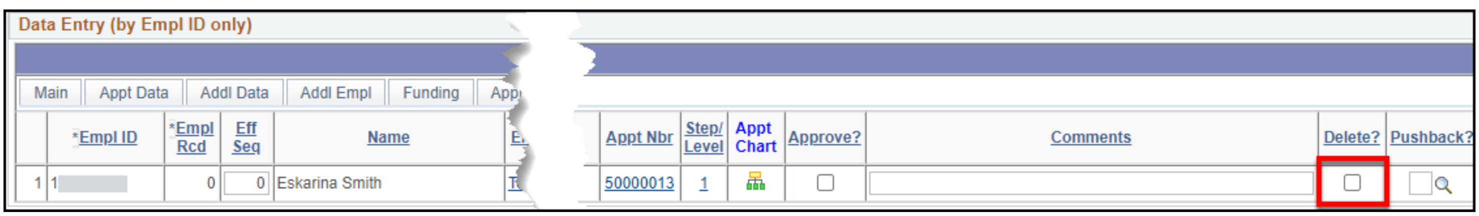
Each department/college may have a different business process, but generally you will need to notify the appropriate MPP/Administrator that there are TAE appointments for them to review.

Remember that some EE Groups may have a different approval workflow, so the step after your review may not be the MPP Approval.

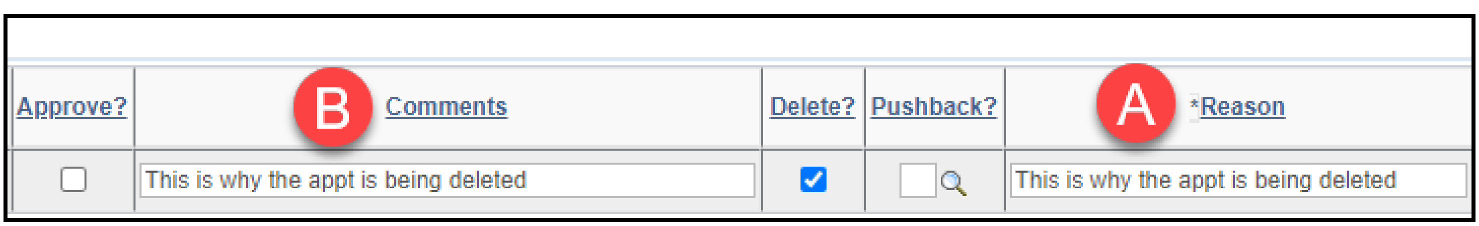
Delete one or more appointments

You can delete an appointment as long as it has not been reviewed/approved by an MPP/Administrator or processed by Payroll.

1. Locate the appointment you want to delete and place a checkmark in the Delete? column.

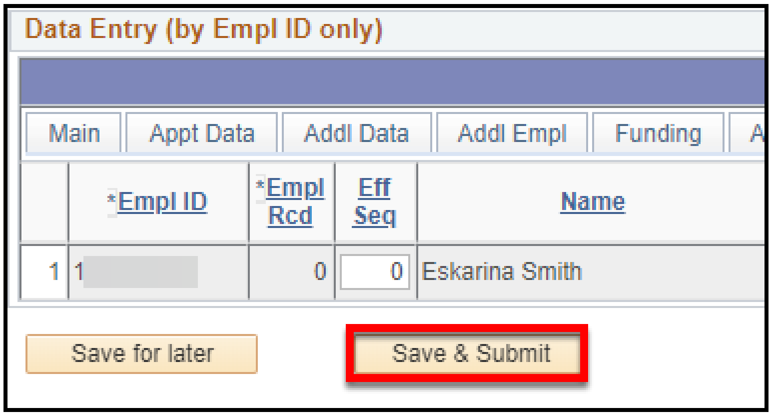


2. Enter the reason for deleting the appointment. Copy and paste the reason in the Comments box.

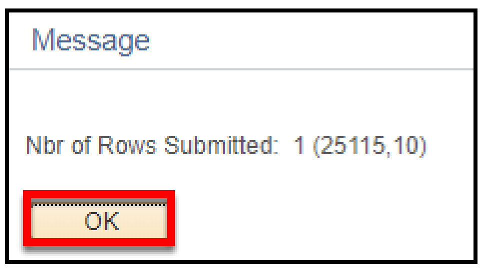


A. Enter why you are deleting the appointment in the Reason field.
B. Then copy and paste the reason into the Comments box.

3. Click Save & Submit to submit the appointment for deletion.



4. You will see a window indicating if there are any rows with errors and how many rows were successfully submitted without errors. Click OK.



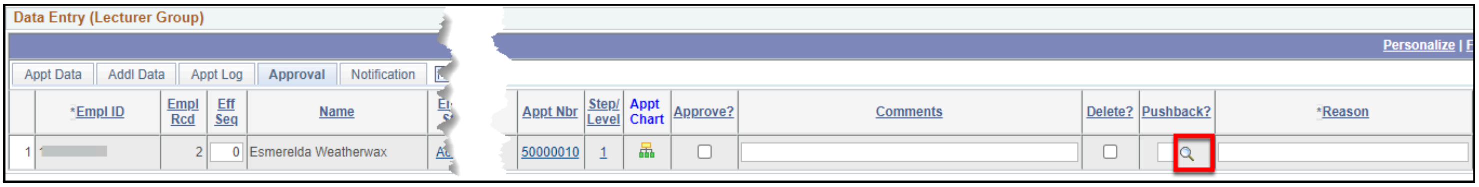
Next Steps

The appointment will be deleted by the system.

Push back one or more appointments

If a revision needs to be made to the appointment, use the Push Back feature to send the appointment back to the originator for revision.

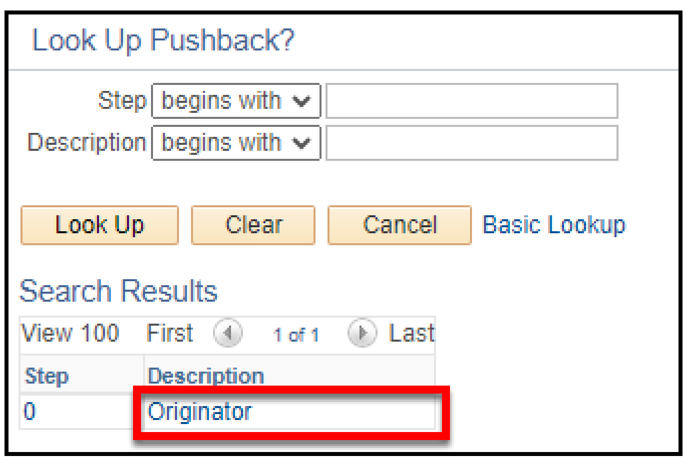
1. Use the magnifying glass in the Pushback? column to look up valid values.



2. Select Originator.

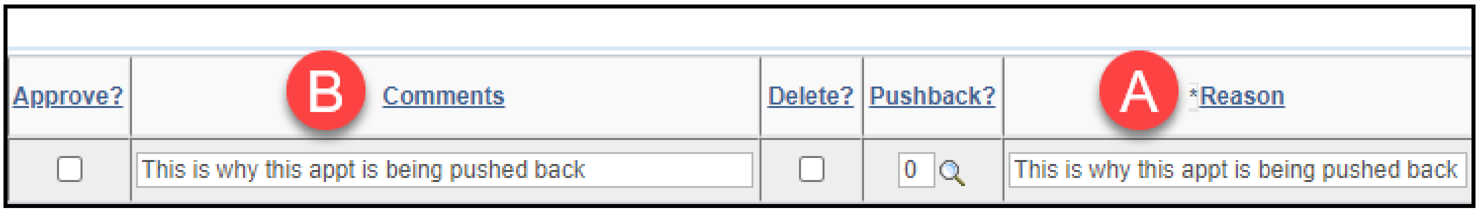
You will only see steps in the workflow that come before you. Typically, you will push back appointments to the **0 - Originator**, which is the person who created the appointment, as they are able to make revisions.

Review [TAE EE Groups and Workflows] to see who is at each step in the workflow for each EE group.



3. Enter a Reason the appointment is being pushed back. Copy and paste the reason in the Comments box.

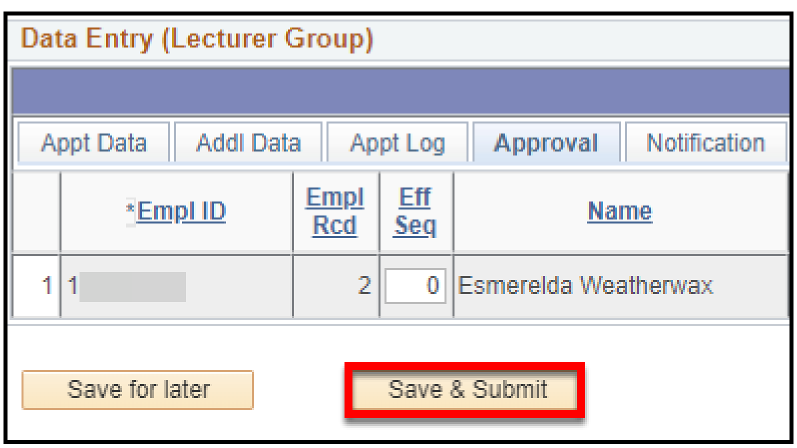
Generally this will be the revisions that you would like the Originator to make to the appointment.



A. Enter why you are sending the appointment back in the Reason field.
B. Then copy and paste the reason into the Comments box.

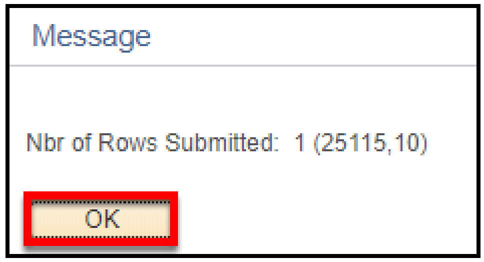
4. Click Save & Submit to send the appointment back to the Originator.

Keep in mind that when you Save & Submit, any appointments marked as Approved will also be submitted!



5. You will see a window indicating if there are any rows with errors

and how many rows were successfully submitted without errors. Click OK.



Next Steps

The Originator will need to revise the appointment and re-submit it.

> Each department/college may have a different business process, but generally you will need to notify the Originator that there are TAE appointments for them to revise.

Next Steps

Approved appointments will move on to the next step in the approval workflow for approval, typically the MPP Approval is the next step.

Deleted appointments will be deleted by the system.

Pushed Back appointments will need to be revised and re-submitted by the Originator.

Need Help?

For specific questions about TAE appointments and processes, contact Academic HR at academichr@fullerton.edu.

For training and how-to assistance, contact IT Training at 657-278-5647 or ittraining@fullerton.edu.

For technical assistance, contact the IT Help Desk at 657-278-7777 or helpdesk@fullerton.edu.