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Date: March 6, 2000 **Code:** TECHNICAL LETTER
HR/SA 2000-03
Ref.: HR/SA 99-08

To: Associate Vice Presidents/Deans of Faculty
Human Resources Directors
Payroll Managers

From: *Cordelia Ontiveros*
Cordelia Ontiveros
Senior Director
Academic Personnel Services

Subject: Promotions, Retroactive Faculty Merit Increases (FMI's), and the SSI Counter

This memorandum serves to provide clarification on the impact of retroactive FMI's on the SSI counter when an employee is promoted.

We have received calls from campuses asking if retroactive FMI's impact an employee's SSI eligibility and the MSA/SSI counter Item 958 when the employee is promoted. The response is YES, the employee's MSA/SSI counter will need to be recalculated in cases where an employee was promoted to a different rank and subsequently received a retroactive FMI.

The following example uses steps for ease of discussion. An AY Associate Professor (2360) received a one-step SSI effective September 1998, placing the employee on Step 13 of Range Code 4, with a SSI counter = 2 and final anniversary date = September 2000. The employee was subsequently promoted effective September 1998 to Professor (Range Code 5) Step 6 (a three-step promotion), with an initial SSI counter = 3 and final anniversary date to September 2001.

The employee received a retroactive two-step FMI effective July 1, 1998, to Associate Professor (Range Code 4) step 14. (Note: The FMI increase was based upon the payscales effective July 1997, which were updated when the General Salary Increase was implemented effective September 1998). Employment history would be adjusted as follows:

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BEFORE THE JULY 1998 FMI:

Effective Date	Trans Code	Salary Amt.	Range Code	Salary Step	Item 958	SSI Max Step
09/98	A64	5318	5	06	0901-3	09
09/98	MSA	4952	4	13	0900-2	15
09/98	GEN	4840	4	12	0901-3	15
Prior to 9/98	n/a	4699	4	12	0901-3	15

AFTER THE JULY 1998 FMI:

Effective Date	Trans Code	Salary Amt.	Range Code	Salary Step	Item 958	SSI Max Step
09/98	A64C	5573	5	08	0999-1	09
09/98	MSAC	5191	4	15	0900-2	15
09/98	GENC	5072	4	14	0901-3	15
07/98	SCR	4924	4	14	0901-3	15
Prior to 7/98	n/a	4699	4	12	0901-3	15

For FY 1999/00, this same principle remains consistent in an open salary range structure. The SSI counter and final salary anniversary date are not affected by the award of FMI's even if the award causes the employee's salary rate to exceed the SSI maximum **within the same salary range (rank)**. However, an employee's MSA/SSI counter may need to be recalculated in cases where an employee is promoted to a higher salary range (rank) and subsequently receives a retroactive FMI. If the number of remaining SSI's in the higher rank are reduced as a result of a retroactive FMI, remaining SSI eligibility should be recalculated (as described in Technical Letters HR/SA 99-08, 99-08 Supplement #1, and 99-09) based upon 2.5% increments from the employee's new salary to the new SSI maximum, and the final anniversary date and SSI counter (Item 958) must be modified accordingly.

HR-ISA is providing a CIRS Compendium report to help campuses identify R03 employees who received a promotion, followed by a retroactive FMI within the same fiscal year. Access Report Code X66 listed under Special Reports, Campus Detail, Cycle 0003. Campuses should review the report to determine if the SSI counter needs to be corrected. We apologize for any inconvenience this may have caused. Please contact Cordelia Ontiveros at (562) 951-4503 if you have any questions. This technical letter is also available via Human Resources Administration's web page at: <http://www.calstate.edu/tier3/HR-Adm/2000pages/2000samemo.htm>. Thank you.