


Date: May 17, 2007 Code: TECHNICAL LETTER
HR/Salary 2007-08

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

From: Gail Brooks 
Associate Vice Chancellor
Human Resources

Subject: Fiscal Year 2006/07 Salary Program for Faculty (Unit 3)

The California State University (CSU) and the California Faculty Association (CFA) have reached agreement on a new Faculty (Unit 3) Collective Bargaining Agreement (CBA) covering the period May 15, 2007 through June 30, 2010. Salary program provisions for 2006/2007 fiscal year are provided below.

❖ **Salary Programs:**

- 3.0% General Salary Increase, effective July 2006 pay period
- 2.65% Service Salary Increase (SSI) on anniversary date, effective fiscal year 2006/2007
- 1.0% General Salary Increase, effective June 30, 2007
 - Implementation instructions for the 1.0% GSI will be addressed in a future technical letter.
- Market Increases – continue to be available at the discretion of campus Presidents

❖ **Other Provisions:**

- Employees in the assistant professor, associate professor and full professor rank for any instructional faculty classification, and librarians, may be paid at a salary rate above the published maximum for their classifications.
- Post Promotion Increases (PPI) – available beginning fiscal year 2008/2009 for eligible senior faculty members who have exhausted all of their SSI eligibility
 - PPIs will be addressed in a future technical letter
- Equity Increases – available beginning fiscal year 2007/2008
 - Eligibility and other details addressed in provisions 31.17 through 31.18 of the CBA
 - Equity increases will be addressed in a future technical letter
- Temporary Faculty Range Elevation Increases
 - Range elevation increases will now become effective at the beginning of the first appointment in the academic year following the range elevation review procedure established by the respective campus.

Detailed Program Information for Salary Provisions:

❖ **General Salary Increase (GSI):**

- Effective July 1, 2006, the State Controller's Office (SCO) will post a 3.0% GSI to individual salary rates of all eligible bargaining unit members. Employees appointed via Immediate Pay (A54) transaction are discussed below.

Distribution:

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CSU Presidents
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- The SCO will post these increases by mass update on the night of May 17, 2007. All employees who were active on July 1, 2006, will receive a GSI retroactive to July 1, 2006. *Employees appointed after July 1, 2006, but before the GSI mass update program is run, will have the GSI applied retroactive to their salary appointment date.*
- The SCO mass update program will process GSIs for active employees whose appointment expiration date has passed. Campus processing instructions to void invalid GEN transactions posted on expired appointments are provided in the SCO's Personnel Letter.
- Campuses may access **CIRS Compendium Report H50, Cycle 0705**, to identify non-academic year employees who may have received the GSI in error because their appointment expiration date was prior to July 1, 2006 but they were not separated. A tab-delimited file is also available by accessing report code **H80, Cycle 0705**. **Both Compendium Reports** will be available May 18, 2007.
- Campus processing instructions for corrections to appointments made via the A54, Immediate Pay appointment are provided in the SCO's Personnel Letter. Campuses may access **CIRS Compendium Report C56, Cycle 0705**, to identify these A54 appointments. This report will be available May 21, 2007. Employees in classes 2322 and 2323 will have their salary increased by 11.0%, consisting of the 3.0% GSI and an 8.0% increase pursuant to Article 40.20. All other A54 appointments will be increased by the 3.0% GSI. Increases are effective July 1, 2006.
- The salary range minimums, maximums and SSI maximums of all bargaining unit classes, *except* for classes 2322 and 2323, will be increased by 3.0% effective July 1, 2006. The salary rates for classes 2322 and 2323, will be increased by 11.0% effective July 1, 2006.
- The updated Unit 3 salary schedule will be available on the CSU Web site (<http://www.calstate.edu/HRAdm/SalarySchedule/Salary.aspx>) after the mass update has been completed.

The following processing instructions are provided in Attachment A:

⇒ Salary Increase Program I – General Salary Increase (GSI)

❖ **2.65% Service Salary Increase (SSI):**

Effective fiscal year 2006/2007, a 2.65% SSI will be provided to eligible employees, effective on the first day of the pay period of the employee's anniversary date.

• **Permanent and Probationary Faculty**

Campuses are responsible for manually processing SSIs for eligible employees. Anniversary dates, Final Salary Anniversary Dates and SSI counters should be reviewed and adjusted as necessary. Keying can begin as early as May 29, 2007, but must be completed by June 30, 2007. **CIRS Compendium Report X66, Cycle 0705**, via the Express Function, provides a historical report of their respective campus' faculty population and will be available for access on May 21, 2007.

Instructions for review of SSI eligibility are as follows:

- Employees must be eligible in fiscal year 2006/2007 in order to receive an SSI.
- With the exception of the SSI Settlement Agreement, SSIs have not been awarded since 2003/2004 (effective July 1, 2004). A range of anniversary dates currently exist from July 2004 forward.
- Current anniversary dates will need to be reviewed based upon provisions 31.19, 31.22 (SSI denials) and for non-qualifying pay periods, and must be adjusted accordingly before determining SSI eligibility for 2006/2007.
- Typically, anniversary dates will be rolled forward per the following, with the year portion of the Final Salary Anniversary Date adjusted accordingly.

<u>Current Anniversary dates as of 2006/2007</u>	<u>Month Eligible for SSI</u>
07/2004, 07/2005, 07/2006	07/2006
08/2004, 08/2005, 08/2006	08/2006
09/2004, 09/2005, 09/2006	09/2006
10/2004, 10/2005, 10/2006	10/2006
11/2004, 11/2005, 11/2006	11/2006
12/2004, 12/2005, 12/2006	12/2006
01/2005, 01/2006, 01/2007	01/2007
02/2005, 02/2006, 02/2007	02/2007
03/2005, 03/2006, 03/2007	03/2007
04/2005, 04/2006, 04/2007	04/2007
05/2005, 05/2006, 05/2007	05/2007
06/2005, 06/2006, 06/2007	06/2007

- Employees who have exhausted all SSI eligibility prior to 07/2006 are not eligible for an SSI in 2006/2007 regardless of their SSI eligibility in 2004/2005 and in 2005/2006.
 - SSIs are awarded to faculty who are active at the time they reached their anniversary date in 2006/2007, regardless of their status at the time of payment. Those on leave will have their anniversary dates adjusted/awarded upon reinstatement.
 - As a reminder, SSIs must be processed for employees promoted in fiscal year 2006/2007 who were SSI-eligible in the lower rank but who did not receive the SSI prior to the promotion effective date.
 - SSI eligibility must be reviewed for individuals *outside* the original SSI/FMI settlement award. To determine whether a faculty member has received the maximum allowable number of SSIs, campuses must deduct the amount of any FMIs the faculty member received, regardless of the rank or classification in which they were awarded. **CIRS Compendium Report X55, Cycle 0705**, via Express Function, will be made available for access on May 21, 2007 to assist campuses with this review.
 - Refer to the "Appointment and Promotion" section of Technical Letter HR/Salary 2004-04 (<http://www.calstate.edu/HRAdm/pdf2004/TL-SA2004-04.pdf>) for SSI counter adjustment details.
 - Campuses should correct the anniversary related fields and process eligible SSIs prior to June 30, 2007 in order to preclude issues with the 2007/2008 fiscal year salary implementation.
- **Temporary Faculty** – Pursuant to Article 12.10, temporary faculty who completed 24 units on a semester campus, or the equivalent on a quarter campus, in the same department or equivalent unit, in fiscal years 2004/2005 and/or 2005/2006, will receive one (1) retroactive SSI effective upon the employee's first appointment in fiscal year 2006/2007. The SSI will be posted to the employee's record via an MSA Transaction, after the GEN Transaction. Refer to provision 12.10 for further SSI eligibility requirements.
 - Temporary employees who have exhausted all SSI eligibility prior to 07/2006 are not eligible for an SSI in 2006/2007 regardless of their SSI eligibility in 2004/2005 and 2005/2006.
 - Regardless of their status at the time of payment, temporary faculty members receive the SSI retroactive to their first appointment in fiscal year 2006/2007.
 - Refer to the "Temporary Faculty" section of Technical Letter HR/Salary 2004-04 (<http://www.calstate.edu/HRAdm/pdf2004/TL-SA2004-04.pdf>) for SSI counter adjustment details.

- **FERP Faculty** – FERP faculty unit employees who satisfy the requirements to receive an SSI in fiscal year 2006/2007 shall have the SSI posted to the employee's record via MSA Transaction.
- **SSI Eligibility Settlement Agreement:**
 - To preclude reducing the amount of the initial award, the new base salary resulting from SSI awards effective December 2006 or later (as a result of the FMI/Settlement referenced in Technical Letter HR/Salary 2006-26 (<http://www.calstate.edu/HRAdm/pdf2006/TL-SA2006-26.pdf>)) will be increased by any retroactive salary increase (including, but not limited to, the GSI and SSI) applied to that new base salary.

The following processing instructions are provided in Attachment A:

- ⇒ Salary Increase Program II – Service Salary Increase (SSI)
- ⇒ Salary Structure Change I - Anniversary Dates, Final Salary Anniversary Date and Counter Adjustments

❖ **Increases for Market:**

- Campus Presidents may grant a salary increase to a probationary or tenured faculty unit employee to address market considerations. This increase is a campus funded, permanent increase to the employee's base salary.
- Employees in classes not specifically stated in Article 31.1, will have their increase subject to the salary range maximum.
- Application procedures and other details are addressed in provisions 31.27 through 31.28.

Refer to the Market Increase program information and processing instructions available on the Human Resources Web site at: http://www.calstate.edu/HRAdm/SalaryProgram/Unit3/procinst_mkteqinc.shtml

- ❖ As a reminder, casual employment employees may be assigned on an hourly or per job basis consistent with provisions 2.6 and 20.7 of the CBA. Refer to Technical Letter HR/Salary 2003-06 (<http://www.calstate.edu/HRAdm/pdf2003/TL-SA2003-06.pdf>) for additional hourly intermittent appointment information.

Questions regarding PIMS processing instructions should be directed to your campus CSU Audits representative at the SCO. Questions regarding CMS Baseline processing instructions should be directed to the CMS liaison for systemwide Human Resources at (562) 951-4418. Questions regarding collective bargaining aspects of this technical letter should be directed to Labor Relations at (562) 951-4400. Any other questions regarding this technical letter should be directed to Human Resources Administration at (562) 951-4411. This document is available on Human Resources Administration's Web site at: <http://www.calstate.edu/HRAdm/memos.shtml>.

GB/aj
Attachment

PROCESSING INSTRUCTIONS

SALARY INCREASE PROGRAM
 I – General Salary Increase (GSI)

PAY SCALES IMPACT:	
Change Summary:	<ul style="list-style-type: none"> Increase salary range minimums, maximums and SSI maximums by 3.0% for all classes <i>except 2322 and 2323</i>. For classes 2322 and 2323, increase salary rates by 11.0% (8.0% increase per Article 40, plus 3.0% GSI).
Class Code(s):	All Unit 3 Classifications
CBID:	R03
Pay Scales Effective Date:	07/01/06
Date in Production:	05/18/07
Pay Letter:	2007-07

EMPLOYMENT HISTORY (EH)/PAYROLL IMPACT:	
Processing Responsibility:	<ul style="list-style-type: none"> The SCO will post increases into PIMS database via mass update. Campuses will process Immediate Payment Transaction corrections to incorporate the GSI after 05/17/07.
Processing Date(s):	Beginning 05/17/07
Effective Date:	07/01/06
PIMS Transaction:	GEN – the SCO A54C for Immediate Payment Transaction corrections - Campuses
Detailed Transaction Code (Item 719)	N/A
EH Remarks (Item 215)	HR/SA 2007-08
Pay Amount:	3.0% 11.0% classes 2322 and 2323
Pay Form:	Base salary increase
Lump Sum Earnings ID:	N/A
Employees on Leave:	<ul style="list-style-type: none"> Increases are effective 07/01/06 for employees on NDI supplementing with Catastrophic Leave (S49 Transaction, Item 957 = 40) on 07/01/06. Increases for other employees on leave (non-pay status) prior to 07/01/06 are to be keyed by the campus via GEN Transaction, effective the date the employee returns to pay status.
Additional Information:	<ul style="list-style-type: none"> All employees who are active as of 07/01/06 will receive the GSI via GEN Transaction, including those employees whose appointment expiration date is prior to 7/01/06 who have not been separated. Employees appointed after 07/01/06, but before the mass update is run, will also have the GSI applied to their salary by processing a correct to the appointment and any subsequent transactions. The SCO will manually process GSIs for those assistant, associate and full professors, and librarians, above the salary range maximum via GEN Transaction. Employees with Immediate Pay Appointments (A54) are entitled to the GSI. Immediate Pay Appointments must be manually adjusted by the campus (including summer term) for all work back to 07/01/06 (regardless of the effective date of

	the A54 transaction). Campuses may access CIRS Compendium Report C56, Cycle 0705 , to identify these A54 appointments. This report will be available 05/21/07
SCO Personnel Letter:	http://www.sco.ca.gov/ppsd/scoltrs/

CMS PROCESSING INFORMATION:																
Workforce Administration:	<ul style="list-style-type: none"> • Salary Schedule Load provided by HR-ISA to SOSS on 05/14/07. This file is <i>targeted</i> to be posted on the CMS website on 05/18/07. The <i>target</i> date to push this update to campus production environments is 05/23/07. • Campus L15 file will be available for download on 05/21/07. For CMS instructions on processing, refer to the Business Process Guide - "SSI – GSI Prob to Perm Load" posted on the CMS website @ http://cms.calstate.edu/T2hr89bp.asp <ul style="list-style-type: none"> • Campuses should process the GEN (L15 file) transaction, then use "correction-mode" to manually update all subsequent salary rows. • All R03 (excluding Immediate Pay & Summer Session) <ul style="list-style-type: none"> • Action Reason: PAY/GSI (GEN) • Effective Date: 07/01/06 (and thereafter, based on appointments, per instructions above). <ul style="list-style-type: none"> ▪ Appointments effective 7/1/2006 should show the Hire appointment and PAY/GSI (GEN) separately. ▪ Appointments effective <u>after</u> 7/1/2006 should show the correction to the appointment salary, per instructions above, using "correction-mode". • The GSI should be applied to the base rate and carried forward to each subsequent salary row using "correction mode". • Empl History Remarks: HR/SA 2007-08 • Immediate Pay & Summer Session: <ul style="list-style-type: none"> • Action/Reason: DTA/COR For <i>each</i> A54 Immediate Pay transaction, <table border="1" style="margin: 10px auto; border-collapse: collapse;"> <tr><td>DTA</td><td>PAY</td><td>A54</td></tr> <tr><td>HIR</td><td>APT</td><td>A54</td></tr> <tr><td>HIR</td><td>CON</td><td>A54</td></tr> <tr><td>HIR</td><td>PRI</td><td>A54</td></tr> <tr><td>REH</td><td>REH</td><td>A54</td></tr> </table> <p style="margin-left: 20px;">campuses should insert a subsequent row, using the Action Reason of DTA/COR (same effective date, incrementing the effective sequence by 1), to manually correct the salary.</p> <ul style="list-style-type: none"> • Effective Date: 07/01/06 (and thereafter, based on payments, per instructions). • Empl History Remarks: HR/SA 2007-08 	DTA	PAY	A54	HIR	APT	A54	HIR	CON	A54	HIR	PRI	A54	REH	REH	A54
DTA	PAY	A54														
HIR	APT	A54														
HIR	CON	A54														
HIR	PRI	A54														
REH	REH	A54														
Temporary Faculty:	• Same as above for All R03.															
Benefits:	N/A															
Time and Labor:	N/A															
Leave Accounting:	N/A															

Absence Management:	N/A
Labor Cost Distribution:	N/A
Additional Instructions:	<ul style="list-style-type: none"> Additional information to be provided in a future CMS bulletin.

SALARY INCREASE PROGRAM
II – Service Salary Increase (SSI)

PAY SCALES IMPACT:	
Change Summary:	N/A
Class Code(s):	N/A
CBID:	N/A
Pay Scales Effective Date:	N/A
Date in Production:	N/A
Pay Letter:	N/A

EMPLOYMENT HISTORY (EH)/PAYROLL IMPACT:	
Processing Responsibility:	<ul style="list-style-type: none"> Campuses
Processing Date(s):	<ul style="list-style-type: none"> 05/29/07 - 06/30/07
Effective Date:	<ul style="list-style-type: none"> SSI = Beginning of the pay period of the employee's Anniversary Date for fiscal year 2006/2007. SSI Denial = Beginning of pay period of the employee's Anniversary Date (Item 330) in fiscal year 2006/2007
PIMS Transaction:	<ul style="list-style-type: none"> SSI = MSA Transaction SSI Denial = 330 Transaction
Detailed Transaction Code (Item 719)	N/A
EH Remarks (Item 215)	HR/SA 2007-08
Pay Amount:	2.65% (or up to the SSI Maximum, as appropriate)
Pay Form:	Base salary increase
Lump Sum Earnings ID:	N/A
Employees on Leave:	<ul style="list-style-type: none"> Employees on NDI supplemented with Catastrophic Leave (S49 Transaction, Item 957= 40) remain SSI eligible. Anniversary dates for other employees on leave or other non-pay status are to be evaluated and adjusted as appropriate on the return from leave.
Additional Information:	<ul style="list-style-type: none"> For probationary/permanent faculty, Anniversary Date (Item 330) and SSI Counter/Final Salary Anniversary Date (Item 958) must be set as appropriate for granted or denied SSIs. Non-qualifying pay periods must be subtracted and Anniversary Dates adjusted accordingly before SSIs can be awarded. Campuses may access CIRS Compendium Report X55, Cycle 0705, via Express Function, to assist campuses for review of employees with FMIs. This report will be available 05/21/07.
SCO Personnel Letter:	N/A

CMS PROCESSING INFORMATION:	
Workforce Administration:	<ul style="list-style-type: none"> • Action Reason: PAY/SSI (MSA) <ul style="list-style-type: none"> • Effective Date: Beginning of the pay period of the employee's Anniversary Date for fiscal year 2006/2007. • Campuses must reset the Anniversary Month, Anniversary Year, Anniversary Code, Faculty SSI Remaining, Last SSI Qualified Date (v8.9) as appropriate, per instructions above. • Action Reason: DTA/DNS (330) <ul style="list-style-type: none"> • Effective Date: Beginning of pay period of the employee's Anniversary Date (Item 330) in fiscal year 2006 • Campuses must reset the Anniversary Month, Anniversary Year, Anniversary Code, Faculty SSI Remaining, Last SSI Qualified Date (v8.9) as appropriate, per instructions above
Temporary Faculty:	<ul style="list-style-type: none"> • Action Reason: PAY/SSI (MSA) <ul style="list-style-type: none"> • Effective Date: Beginning of the pay period of the employee's Anniversary Date for fiscal year 2006/2007. • Campuses must reset the Anniversary Month, Anniversary Year, Last SSI Qualified Date (v8.9) as appropriate, per instructions above. The following fields must be set as indicated below: <ul style="list-style-type: none"> • Anniversary Code: NONE • Faculty SSI Remaining: 0
Benefits:	N/A
Time and Labor:	NA
Leave Accounting:	N/A
Absence Management:	N/A
Labor Cost Distribution:	N/A
Additional Instructions:	Additional information to be provided in a future CMS bulletin.

SALARY STRUCTURE CHANGES I – Anniversary Dates, Final Salary Anniversary Date and Counter Adjustments

PAY SCALES IMPACT:	
Change Summary:	N/A
Class Code(s):	N/A
CBID:	N/A
Pay Scales Effective Date:	N/A
Date in Production:	N/A
Pay Letter:	N/A

EMPLOYMENT HISTORY (EH)/PAYROLL IMPACT:	
Processing Responsibility:	Campuses will correct invalid and/or incorrect Anniversary Dates, Final Salary Anniversary Dates, and counters.
Processing Date(s):	05/29/07 - 06/30/07
Effective Date:	07/01/06 or appointment or reinstatement, if later
PIMS Transaction:	CRO
Detailed Transaction Code (Item 719)	N/A
EH Remarks (Item 215)	HR/Salary 2007-08
Pay Amount:	N/A
Pay Form:	N/A
Lump Sum Earnings ID:	N/A
Employees on Leave:	<ul style="list-style-type: none"> Permanent and probationary faculty on an unpaid leave of absence as of 07/01/06, should have their Anniversary Date entered upon return from leave.
Additional Information:	<ul style="list-style-type: none"> Anniversary Date (Item 330), Final Salary Anniversary Date and Counter (Item 958) should be accurate at the start of the contract effective 07/01/06. Non-qualifying pay periods must be subtracted and Anniversary Date fields adjusted accordingly before SSIs can be awarded for 2006/2007. Anniversary Date (Item 330) fields continue to be optional for temporary appointments. Final Salary Anniversary Date and Counter field = NONE-0. Employees who have separated after 07/01/06 and are due an SSI prior to separation, must have a correct Anniversary Date on their employment record prior to posting a separation transaction. Separation transactions that have already been processed must be corrected to reflect the employees accurate Anniversary Date. Employees on IDL/TD remain SSI eligible. Refer to Article 31 of the Collective Bargaining Agreement.
SCO Personnel Letter:	N/A

CMS PROCESSING INFORMATION:	
Workforce Administration:	<ul style="list-style-type: none"> • Action/Reason: PAY/MOU (CRO) <ul style="list-style-type: none"> • Effective Date: 07/01/06 or appointment or reinstatement, if later. • Campuses will correct invalid and/or incorrect values for the following PeopleSoft fields as instructed above: <ul style="list-style-type: none"> ▪ Anniversary Month ▪ Anniversary Year ▪ Anniversary Code ▪ Faculty SSI Remaining ▪ Last SSI Eligibility Date (v8.9 only) • Empl History Remarks: HR/SA 2007-08
Temporary Faculty:	Same as above
Benefits:	N/A
Time and Labor:	N/A
Leave Accounting:	N/A
Absence Management:	N/A
Labor Cost Distribution:	N/A
Additional Instructions:	<ul style="list-style-type: none"> • The CMS processing order, as referenced in this tech letter, is as follows: <ol style="list-style-type: none"> 1. PAY/GSI (GEN) 2. Review SSI eligibility 3. PAY/MOU (CRO) 4. PAY/SSI (MSA) • NOTE: CMS has developed a reporting tool to assist campuses in analyzing SSI eligibility. Details will be provided in a future CMS bulletin.