Date: October 4, 2012

To: Human Resources Officer
    Payroll Managers

From: Evelyn Nazario
    Associate Vice Chancellor
    Human Resources Management & CO HR Services

Subject: Implementation of New Classification and Updated Accounting and Budget Analyst Classification Standards (Units 7 & 9)

Overview

Audience: HR professionals responsible for hiring and classifying employees, campus designees responsible for employee processing, and/or individuals with responsibility for accounting and budget work

Action Item: Implementation of new Accountant III classification and updated classifications in Units 7 (Clerical and Administrative Support Services) & Unit 9 (Technical and Support Services), effective with the October 2012 pay period

Affected Employee Group(s)/Unit(s): Employees engaged in accounting work in Unit 7, employees engaged in accountant and budget work in Unit 9, and employees performing Accountant III work in “in lieu of” classifications

Summary

As communicated in HR 2012-11, the California State University (CSU) has concluded the Accounting and Budget Classification Study and reached agreement with the California State University Employees’ Union (CSUEU) on the implementation of updated Accounting and Budget classification standards and corresponding salary ranges effective with the October 2012 pay period. This Technical Letter provides the following information:

- New Classification and Corresponding Class Code
- List of Updated Classification Standards
- Classification Title Changes
- Abolished Classification
- Processing Instructions

Distribution:
CSU Presidents
Associate Vice Presidents/Deans of Faculty
Vice Chancellor, Human Resources
Budget Officers
Vice Presidents, Administration
New Classification and Corresponding Class Code:
- Accountant III (4556)

Updated Classification Standards:
- Accounting Clerk (1733)
- Accounting Technician I (1730)
- Accounting Technician II (1741)
- Accounting Technician III (1740)
- Accountant I (1762)
- Accountant II (4555)
- Budget Analyst (5287)
- Senior Budget Analyst (5284)

Classification Title Changes:
- Budget Analyst (5287), previously Assistant Budget Analyst (5287)
- Senior Budget Analyst (5284), previously Associate Budget Analyst (5284)

Revised classification standards were provided as an attachment to HR Letter 2012-11 and can also be viewed and printed at the Human Resources Classification Standards Web site at: https://www.calstate.edu/HRAdm/Classification/index.shtml

Abolished Classification
- Supervising Account Clerk I (1727)

Employee Reclassification to the New Classification (Accountant III)
The terms as outlined in the Side Letter of Agreement are in accordance with reclassification provisions in the current CSU/CSUEU collective bargaining agreement.

| Effective Date:     | Effective with the October 2012 pay period.  
|                     | Any reclassification resulting from the classification review process will be retroactive to the October 2012 pay period.  
|                     | Implementation of this agreement will be completed no later than October 1, 2013. Any reclassification submitted after the completion of this implementation will be handled according to existing provisions of the collective bargaining agreement. |
| Salary Increase:    | Pursuant to Article 20, campuses may elect to provide employees in-range progression increases above their new minimum salary rates.  
|                     | Employees in "in-lieu of" classifications who are reclassified to the new Accountant III classification will receive at least a 5% increase, up to the salary range maximum, if the salary range maximum of the Accountant III is at least 2.5% above the salary range maximum of the employee's current classification. |
Employment Status:
- Employees reclassified as a result of the implementation of the new Accountant III classification will not have any change to their temporary, probationary or permanent status.
- Any permanent employee reclassified to Accountant III classification, in accordance with this Agreement, will not have to serve a new probationary period.
- Probationary employees performing Accountant III work shall receive credit toward permanency in the relevant classification for time served in a prior classification.
- The time spent by temporary employees performing Accountant III work shall be counted for the purpose of qualifying for permanent status.

Seniority:
- Seniority points for employees in “in lieu of” classifications will be transferred to the new Accountant III classification.
- Seniority points for those employees otherwise reclassified/promoted after the completion of this implementation into the new Accountant III classification will be handled according to existing provisions of the collective bargaining agreement.

New Hires:
- Effective with the October 2012 pay period, all newly hired employees who are to perform Accountant III duties as described in the Accountant III classification standard, shall be hired in Unit 9 as an Accountant III.

Adverse Impact:
- Employees in an “in-lieu of” classification with a higher salary range maximum may be grandfathered in that current classification to ensure no adverse impact; however, an employee may voluntarily elect to be reclassified to Accountant III. The decision by an employee must be made no later than thirty (30) days after notice of eligibility to be reclassified.
- There shall be no demotion of any employee as a result of the implementation of this Agreement.

Additional Information: Refer to the specific Side Letter of Agreement provided in HR 2012-11.

Implementation of New Salary Ranges for Existing Classifications:

Effective Date: Effective with the October 2012 pay period.

Salary Increase:
- None, except employees whose base salary is below the new salary range minimum will automatically be moved to the applicable salary range minimum for their classification.
- Pursuant to Article 20, campuses may elect to provide employees in-range progression increases above their new minimum salary rates.

Additional Information: Refer to the specific Side Letter of Agreement provided in HR 2012-11.

Processing Instructions:
The following processing instructions are provided in Attachment A:
⇒ I. Employee Reclassification to a New Classification
⇒ II. New Salary Range for Existing Classifications – Employee Impact

For processing instructions and general information on all salary programs, refer to Human Resources Salary Programs Web site at: http://www.calstate.edu/hradm/salaryprogram/index.shtml
Please direct questions regarding this technical letter as follows:

- PIMS processing instructions: CSU Audits representative at the SCO
- CMS Baseline processing instructions: CMS liaison for systemwide HRM at (562) 951-4418
- Collective bargaining aspects: Labor Relations at (562) 951-4400
- All other questions: Human Resources Management at (562) 951-4411

This document is available on the Human Resources Management's Web site at: https://www.calstate.edu/HRAdm/memos.shtml

Attachment

EN/ct
## PROCESSING INSTRUCTIONS

### I. EMPLOYEE RECLASSIFICATION TO A NEW CLASSIFICATION

#### PAY SCALES IMPACT:

<table>
<thead>
<tr>
<th>Change Summary:</th>
<th>New Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Code(s):</td>
<td>4556</td>
</tr>
<tr>
<td>CBID:</td>
<td>R09</td>
</tr>
<tr>
<td>Pay Scales Effective Date:</td>
<td>October 1, 2012</td>
</tr>
<tr>
<td>Date in Production:</td>
<td>October 10, 2012</td>
</tr>
<tr>
<td>Pay Letter:</td>
<td>2012-04</td>
</tr>
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#### EMPLOYMENT HISTORY/PAYROLL IMPACT:

<table>
<thead>
<tr>
<th>Processing Responsibility:</th>
<th>Campus</th>
</tr>
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<tbody>
<tr>
<td>Effective Date(s):</td>
<td>October 1, 2012</td>
</tr>
<tr>
<td>Processing Date(s):</td>
<td>Classification reviews will be completed no later than October 1, 2013.</td>
</tr>
<tr>
<td>PIMS Transaction:</td>
<td>A63</td>
</tr>
<tr>
<td>Detailed Transaction Code (Item 719):</td>
<td>N/A</td>
</tr>
<tr>
<td>EH Remarks (Item 215):</td>
<td>HR/SA 2012-11</td>
</tr>
</tbody>
</table>

**Pay Amount:**
- Employees whose base salary is below the salary range minimum of the new Accountant III classification must be moved to the Accountant III salary range minimum.
- Minimum 5% increase for employees moving to the Accountant III classification if the salary range maximum is 2.5% or higher than the employee’s current classification per the Side Letter of Agreement and Article 9 of the CSU/CSUEU collective bargaining agreement.

**Pay Form:** Base salary increase

**Employees on Leave (non-pay status):** Employees on a full unpaid leave should be reclassified upon their return from leave.

**Additional Information:** N/A

**SCO Personnel Letter:** N/A

#### CMS PROCESSING INFORMATION:

**Workforce Administration:**
- Action Reason(s):
  - JRC/JCC (A63)
  - POS/JRC (A63)
- Effective Date: 10/01/2012
- Job Code: 4556
- Union Code: R09
- Employment History Remarks: HR/SA 2012-11
- Comp Rate: Update as instructed above

**Temporary Faculty:** N/A

**Benefits:**
- Benefit Program: STN (Standard)

**Time and Labor:** N/A

**Leave Accounting:** N/A

**Absence Management:** AM Pay Group(s): CSUEU SAL NX; CSUEU SALX; CSUEU HRLY

**Labor Cost Distribution:**
- Job Function: STF (Staff)

**Additional Instructions:** Additional communication to be provided in a future CMS bulletin.
## II. NEW SALARY RANGE FOR EXISTING CLASSIFICATIONS – EMPLOYEE IMPACT

### PAY SCALES IMPACT:

<table>
<thead>
<tr>
<th>Change Summary:</th>
<th>Salary Range Change</th>
</tr>
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<tbody>
<tr>
<td>Class Code(s):</td>
<td>Salary Range Minimum, Salary Range Maximum: 4555</td>
</tr>
<tr>
<td></td>
<td>Salary Range Maximum: 1762, 5287, 5284</td>
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<tr>
<td>CBID:</td>
<td>R09</td>
</tr>
<tr>
<td>Pay Scales Effective Date:</td>
<td>October 1, 2012</td>
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<tr>
<td>Date in Production:</td>
<td>October 10, 2012</td>
</tr>
<tr>
<td>Pay Letter:</td>
<td>2012-04</td>
</tr>
</tbody>
</table>

### EMPLOYMENT HISTORY/PAYROLL IMPACT:

| Processing Responsibility: | Campus |
| Effective Date(s): | October 1, 2012 |
| Processing Date(s): | Current employees in class 4555 must be moved to the new salary range minimum by November 1, 2012. |
| PIMS Transaction: | CRO |
| Detailed Transaction Code (Item 719): | N/A |
| EH Remarks (Item 215): | HR/SA 2012-11 |

| Pay Amount: | Employees whose base salary is below the salary range minimum for class 4555 must be moved to the applicable new salary range minimum. |
| Pay Form:   | N/A |
| Employees on Leave (non-pay status): | For employees who are below the new minimum and are in non-pay status, make adjustments to the new minimum on return from leave transaction. Enter HR/SA 2012-11 in Item 215.  
  - For employees on paid disability leave, post a CRO transaction effective the October 2012 pay period to adjust salary. |
| Additional Information: | N/A |
| SCO Personnel Letter: | N/A |

### CMS PROCESSING INFORMATION:

| Workforce Administration: | Action Reason(s):  
  - PAY/MOU (CRO)  
  - DTA/MOU (CRO)  
  - Effective Date: 10/01/2012  
  - Job Code(s): 4555, 1762, 5287, 5284  
  - Union Code: R09  
  - Employment History Remarks: HR/SA 2012-11  
  - Comp Rate: Update as instructed above |
| Temporary Faculty: | N/A |
| Benefits: | N/A |
| Time and Labor: | N/A |
| Leave Accounting: | N/A |
| Absence Management: | N/A |
| Labor Cost Distribution: | N/A |
| Additional Instructions: | N/A |