

CMS Business Process Guide
Job Data

The Job Data module stores employees’ employment histories or “job records.” A job record consists of effective-dated “rows” of personnel transactions starting with the employee’s hire. An employee may hold multiple jobs/job records, which are identified by the “Employee Record #”, or “Empl Rcd #” for short, and is displayed at the top of each page of Job Data.

This guide explains the various fields or “data elements” of which a job record is comprised. Below are the Job Data web pages:

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# Work Location

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| ****Work Location**** |  |
| --- | --- |
| **ID** | **System-assigned Employee ID for this employee** |
| Empl Rcd # | System-assigned number for this job or employee record |
| HR Status | System-assigned employee status for the HR module based on the job action |
| Payroll Status | System-assigned employee status for the Payroll module based on the job action |
| Effective Date | Effective date of the personnel transaction or job row |
| Sequence | Sequence of job rows for job rows with the same effective dates |
| Job Indicator | Identifies whether this job is Primary or Secondary  |
| Action | The category of personnel transaction being processed for an employee |
| Reason | Further defines the Action category |
| Last Start Date | Latest date this employee was hired or rehired into this Employee Record |
| Termination Date | Date that this employee was terminated from this Employee Record |
| Expected Job End Date | Date this appointment is expected to end |
| Position Number | Identifies the position the employee occupies |
| Position Entry Date | Date on which the employee last entered the Position |
| Position Management Record | Not used at Cal Poly |
| Regulatory Region | Determines how the system processes data for this job |
| Company | Campus identifier |
| Business Unit | An identification code that represents a high-level organization of business information |
| Department | The code of the department to which an employee has been assigned |
| Department Entry Date | Date on which the employee was last assigned to the department |
| Location | Campus identifier |
| Establishment ID | Campus identifier |
| Date Created | Date the Job row was first entered into PeopleSoft |

# Job Information

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| ****Job Information**** |  |
| --- | --- |
| **Job Code** | **Identifies the job classification of the employee** |
| Entry Date | Date on which the employee was last assigned to the job code displayed |
| Supervisor Level | Not Used at Cal Poly |
| Reports To | Not Used at Cal Poly |
| Regular/Temporary | Indicates if employee is regular or temporary employee |
| Full/Part | Indicates whether an employee is a full or part-time employee |
| Empl Class | Defines the type of appointment for this job row |
| Officer Code | Not Used at Cal Poly |
| Regular Shift | Not Used at Cal Poly |
| Classified Indc | Not Used at Cal Poly |
| Standard Hours | Derived from FTE and reflects the number of hours the employee is regularly scheduled to work (Due to system requirements hourly-intermittent employees will have 40 hours in this field) |
| Work Period | Time period in which employees must complete the standard hours |
| FTE | Percentage of full time the employee should normally work in this job (Due to system requirements hourly-intermittent employees will have 1.0 fte in this field) |
| Adds to FTE Actual Count | When checked, will add fte amounts from other jobs |
| Encumbrance Override | Not Used at Cal Poly |
| Contract Number | Not Used at Cal Poly |
| Contract Type | Not Used at Cal Poly |
| FLSA Status | Indicates whether a Job Code/Salary Grade is subject to overtime pay (exempt/nonexempt) based on the Fair Labor Standards Act |
| EEO Class | This field is used to include or exclude an employee from EEO / IPEDS reporting, based upon the value selected |
| Work Day Hours | Not Used at Cal Poly |

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| Job Labor |  |
| --- | --- |
| Union Code | Bargaining Unit identifier associated with job code of position |
| All other fields  | Not used at Cal Poly |

# Payroll

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| ****Payroll**** |  |
| --- | --- |
| **Payroll System** | **Payroll System used to link Payroll-related modules** |
| Pay Group | Identifies the type of employment for attendance purposes |
| Holiday Schedule | Holiday Schedule, required set-up but not used at Cal Poly |
| Employee Type | Hourly or Salaried, based on Pay Group  |
| Tax Location Code | Identifies State where payroll is processed |
| FICA Status | Not Used at Cal Poly; FICA Status is incorporated with Retirement Code in the CSU |
| GL Pay Type | Not Used at Cal Poly |
| Combination Code | Not Used at Cal Poly |
| Edit Chartfields | Not Used at Cal Poly |

# Salary Plan

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| ****Salary Plan**** |  |
| --- | --- |
| **Salary Administration Plan** | **Identifies those Job Codes that share the same Salary Grade information** |
| Grade | Identifies the range or level in the salary schedule associated with the job code for the position |
| Grade Entry Date | Date the employee last entered this grade |
| Includes Wage Progression Rule | Not Used at Cal Poly |
| Step | If the Job Code has a step structure, the Salary Step indicates the step number within a given Salary Grade |
| Step Entry Date | Date the employee last entered the Step |

# CSU Job

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| CSU Job |  |
| --- | --- |
| PPT Status | Status of Personnel Payroll Transaction (PPT) form – for some job actions a PPT is generated for the Payroll Office for input into the State Controller’s Office (SCO) payroll system |
| Run Date | Date PPT was generated |
| Probation Code | Probation or Tenure status |
| Prob End | End date of Probationary period |
| Anniversary Code | Indicates eligibility to receive a Service-Based Salary Increase (SSI) |
| Anni Month/Year | Pay month and year in which eligible to receive an SSI |
| Retirement Code | Indicates employee’s retirement system (code incorporates FICA status in the CSU) |
| Pay End Date | Indicates the expected last pay date for the employee |
| Legal Reference | Cites a specific reference in the law under which a retired CalPERS annuitant may be employed by CSU without reinstatement from retirement status or loss of retirement benefits |
| Red Circle Date | This reflects the Red Circled salary expiration date for an employee who has been formally assigned a salary rate over the maximum of the salary range, per the appropriate MOU |
| AY Dur of Appt | Track duration of temporary, academic year appointments |
| Empl History Remarks | Comments for the SCO Payroll System  |
| Unit | Paycheck delivery identifier |
| Primary Fund | Indicates the primary funding source that will pay for ongoing or one time costs of performance or merit comp increases |
| PPT Processing Comments | Comments that will print on PPT used for communication to Payroll regarding processing |

# Compensation

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| Compensation |  |
| --- | --- |
| Compensation Rate | Actual salary rate based on employee’s actual FTE; expressed as an hourly rate for hourly employees |
| Frequency | Identifies the basis for computing an employee's Compensation Rate |
| Change Amount | Compensation difference from the previous job row |
| Compa-Ratio | Displays the percent-through-range calculation, based on the salary plan and grade  |
| Change Percent | Percent change in compensation from the previous job row |
| Job Ratio | Displays the percent-through-range calculation, based on the midpoint salary of the person’s job code |
| Annual | Compensation Rate displayed at an annual rate |
| Daily | Compensation Rate displayed at an daily rate |
| Monthly | Compensation Rate displayed at an monthly rate |
| Hourly | Compensation Rate displayed at an hourly rate |
| Rate Code | Identifier for pay components. Defines rates of pay |
| Seq | Effective sequence of compensation rows |
| Comp Rate | Represents the full-time equivalent salary amount for the position. The salary reflected is expressed in a monthly or hourly rate based on the CSU salary schedule. |
| Currency | Currency code upon which the compensation rate will be based |
| Frequency | Identifies the basis for computing an employee's Compensation Rate |

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| CSU Faculty Job |  |
| --- | --- |
| Sabbatical Eligibility Month/Year | Month in which a faculty member has or will attain eligibility for a Sabbatical Leave per the MOU |
| FERP Eligibility End Date | Participation end date in Faculty Early Retirement Program per MOU |
| DIP Eligibility Month/Year | Year in which a faculty member has or will attain eligibility for a Difference in Pay Leave per the MOU |
| Faculty SSI Remaining | Number of Salary Service Increases a faculty member has remaining based on the MOU |
| Faculty Fraction | Faculty member timebase expressed as a fraction |
| Last SSI Qualified Date | Last date faculty member received an SSI |
| CSU Recruit/Termination | Link to CSU Recruit module |
| CSU TF Contract Data | Link to Temporary Faculty Contract Data module |

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# Employment Information

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| Employment Information |  |
| --- | --- |
| Organizational Instance Rcd | Represents a particular job associated with the Empl ID |
| Original Start Date | Date of employee’s first assignment at Cal Poly  |
| Last Start Date | Latest date this employee was Hired or Rehired into this position |
| First Start Date | First date this employee was Hired or Rehired into this position |
| Termination Date | Date employee was Terminated from this position |
| Org Instance Service Date | Date employee was first appointed to this Organizational Instance |
| Last Assignment Start Date | Not used at Cal Poly |
| First Assignment Start | Not Used at Cal Poly |
| Assignment End Date | Not Used at Cal Poly |
| Home/Host Classification | Not Used at Cal Poly |
| Company Seniority Date | Start date used for service awards creditable service, adjusted for certain leaves and breaks in service |
| Benefits Service Date | Not Used at Cal Poly |
| Seniority Pay Calc Date | Not Used at Cal Poly |
| Probation Date | Not Used at Cal Poly |
| Professional Experience Date | Employee’s earliest Hire date; reset to Rehire date if there was a break in service |
| Business Title | Position Title from the Position Mgmt module |
| Last Verification Date | Not Used at Cal Poly |
| Position Phone | Not Used at Cal Poly |

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