

Employment Status Form (ESF) Guide

Welcome

This guide provides step-by-step instructions for completing the [DocuSign Power form Employment Status Form \(ESF\)](#).

When is an ESF Required?

An ESF is required for new hires, re-hires, extensions, employment changes, and youth activity positions involving supervision of minors (typically summer camps).

Section 1: Form Setup

Step 1: Date

- Date will automatically populate.

Step 2: Select Form Type

- Select Employee Status form from the dropdown menu.
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Section 2: Employee & Project Information

Step 3: Select Type of Transaction

Choose one option:

- New Hire – First-time employee with the Research Foundation
 - Re-hire – Returning employee or extension of employment
 - Change – Updates to pay, classification, employee type, or chartfield
 - Required: Please explain the change in the text box next to change, if changing job duties, a new job description will need to be uploaded
 - Youth Activity – Position involves supervising minors (typically summer camps)
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Step 4: Currently a CSULB University employee

- Indicate whether the employee is currently a CSULB employee.
 - If Yes:
 - [Additional Employment Agreement Form](#) required and must be routed to employees and dean for signatures.
 - When Dual employment is selected the link for Additional Employment Agreement will appear for routing
 - CSULB Staff HR will review duties for overlap
 - Employees may be subject to overtime eligibility
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Step 5: Complete Required Fields

Fill in all applicable fields:

- College Name – Department or college the employee reports to
- Principal Investigator (PI) – Individual responsible for the project in accordance with the Delegation of Authority (DOA).
- Employee Name – Enter employee’s legal name (Preferred names may be entered in the preferred name section during onboarding)
- CSULB ID Number – Enter if available; HR will obtain if needed
- Employee Email – Enter the employee’s personal email address

Step 6: Visa Clearance

- If the employee holds an F1/J1 Visa:
 - Additional clearance is required by CSULB Tax Specialist
 - HR will contact the employee directly

Employees may not start work until clearance is complete.

Section 3: Employment Status Information

Step 7: Employment Dates

- Start Date – Enter the employee’s actual first day worked
- End Date – Must follow these limits:
 - Students & Full Time: Up to 1 year
 - Temporary: Up to 6 months
 - Seasonal: Up to 10 weeks

Step 8: Employment Details

- Employee Status – Select Benefited or Non-Benefited
- Employee Type – Select from the dropdown
- Classification Description – Select the correct classification and associated pay rate
- Undergraduate and Graduate students may only be selected under the approved student classifications listed in the dropdown. Student employees are not eligible for non-student job classifications.
- Working Title (Optional) – May differ from classification description

Non-benefited categories, total work hours are not to exceed 960 hours per rolling 12 months from date of hire

Step 9: Compliance Questions

Working with Minors or Elderly

- Select Yes/No

- If Yes:
 - Live Scan clearance must be completed before starting date
 - Valid for 1 year and must be renewed annually

Access to Level 1 Data or Cash

- Select Yes/No
- If Yes:
 - Background check must be completed before employment begins

Employees cannot begin work until clearances are complete.

Section 4: Salary Information

Step 10: FLSA Status

Select one:

- Hourly – Paid based on hours worked
- Exempt – Paid a fixed salary per pay period

Step 11: Enter Pay Information

- Hourly Rate: Enter the employee hourly rate
- Exempt Employees: Enter the annual salary
 - The system will auto-calculate the hourly equivalent and per pay period

Section 5: Chartfield Information

Step 12: Enter Chartfield Information

- For grant-sponsored programs, use the chartfield provided by ORED (typically begins with G, RS, or C)
- For non-grant programs, obtain the chartfield from the department (typically begins with AT or M).
- Not all chartfields will include every field; some may only have fund number and department number (examples below).

Chartfield Information					
Fund	Department	Project	Program	Job Code	Effort %
G1000	00100	G100025100			
C1001	00200				
RS1234	00300		10069		
AT100	00400				
M1001	00500				

Exempt Employee Requirement

- Salaried (Exempt) employees must include an effort percentage
- Effort may be 100% on one chartfield or split across multiple chartfields
- Total effort must equal 100% across all chartfields (example below).

Chartfield Information					
Fund	Department	Project	Program	Job Code	Effort %
G1000	00100	G100025100			25%
C1001	00200				25%
G2222	00100	G222224100		C9001	25%
RS1234	00300		10069		25%

Section 6: Approval Signatures

Step 13: Employee Signature:

- Employee - Individual being hired/Re-hired
- Requestor - Individual who is initiating Employment Status form
- Project Director – PI individual responsible for the project in accordance with the Delegation of Authority (DOA).
- Approver 1 - Level 4 or higher approver (typically ASM)
- Approver 2- (Optional) if required by department
- Grants & Contractor Administrator: GCA overseeing sponsored Program. For M and AT fund, enter: FND-HR@csulb.edu
- Human Resources: FND-HR@CSULB.EDU

Summary

Accurate ESF completion ensures timely onboarding, payroll accuracy, and regulatory compliance. Always review your form carefully and consult HR with questions.

End of Training Guide