

Date: April 27, 2023

Code: **TECHNICAL LETTER  
HR/Salary 2023-07**

To: Associate Vice Presidents, Faculty Affairs/Academic Personnel  
Associate Vice Presidents, Human Resources  
Payroll Managers

From: Beth Ryan  Interim Associate Vice Chancellor, Human Resources  
Dr. Sarah Fried-Gintis  Sr. SW Director, Academic & Staff Human Resources

Subject: **FY 2023/2024 Service Salary Increase Salary Program for California Faculty Association (CFA – Unit 3) Employees**

**Summary:**

We are pleased to provide information regarding the Service Salary Increase (SSI) salary program for fiscal year (FY) 2023/2024 agreed to by the California State University and the California Faculty Association on February 3, 2022. Academic personnel managers and staff, campus payroll managers, and campus designees responsible for payroll processing should review the remainder of this technical letter.

**Action Item(s):**

Implement FY 2023/2024 (July 1, 2023, to June 20, 2024) SSI Salary program Provisions.

**Affected Employee Groups(s)/Units:**

Eligible California Faculty Association (Unit 3) employees

**Details:**

The agreement reached between the California State University (CSU) and the California Faculty Association (CFA – Unit 3), effective February 3, 2022, provides salary program provisions for FY 2023/2024 as follows:

**2.65% Service Salary Increase (SSI) for eligible employees on their anniversary date in FY 2023/2024.**

**Definitions:**

- Service Salary Increase (SSI):** Upward movement on the salary schedule awarded to faculty members who are eligible based on qualifying service, satisfactory performance, and additional criteria described below. SSI increases are limited to eight (8) increases under the salary schedule per range.
- SSI Maximums:** A maximum salary rate (SSI maximum) has been established in each salary range. Except in cases where the faculty member has received one or more Faculty Merit Increase (FMI) awards, an SSI award may not increase the faculty member's salary beyond the SSI maximum rate. An employee who is otherwise eligible for an SSI whose salary is below the SSI maximum rate by less than the amount of the SSI will receive an increase only up to the SSI maximum rate.
- Faculty Merit Increase (FMI):** A merit increase program that ended in 2000/2001 in which awards were made based on evaluations of faculty performance in 1997/98, 1998/99, and 1999/2000.
  - NOTE:** Faculty hired on or after July 1, 2000, have not received any FMIs.

**Distribution:**

Vice Chancellor, Human Resources  
All Campus Vice Presidents

State Controller's Office/PPSD

4. **SSI Counter:** A calculation that tracks (a) the number of SSIs that a faculty unit employee has received in one range and (b) remaining SSI eligibility within that range.

**Eligibility Criteria:**

- ✓ Faculty members determined by the appropriate administrator to have performed in a **satisfactory manner** in carrying out the duties of their positions in the prior fiscal year (inclusive of Fall 2022 and Spring 2023 terms).
  - In the instance that a faculty member has been found not to have performed in a satisfactory manner and an SSI is denied, please note:
    - The campus is responsible for posting an SSI denial transaction in the system.
    - If a denied SSI is successfully appealed and the employee is later granted the SSI, the campus must void the denial and post the SSI as appropriate.
  
- ✓ Faculty members (hired prior to July 1, 2000) who **have** received **FMI**s:
  - Receipt of an FMI does not reduce a faculty member's SSI eligibility.
    - Pursuant to Article 31 of the CFA CBA, to determine whether a faculty member has received the maximum allowable number of SSIs, deduct the amount of FMIs received regardless of rank or classification in which FMIs were awarded.
    - If the current salary is below the SSI maximum after deducting the FMI amount, and the employee is otherwise SSI eligible, the employee is entitled to an SSI of 2.65% or the amount necessary to reach the SSI maximum after deductions, whichever is less.
    - A faculty member may receive the complete SSI regardless of whether it brings them above the SSI Maximum rate.
  
- ✓ Faculty members who have **not** received **FMI**s:
  - SSI award increases faculty member's salary rate up to the SSI maximum rate and cannot exceed SSI maximum.
  
- ✓ Faculty members who received **additional salary increases**:
  - By moving the individual closer to the SSI Maximum, salary increases that did not result in a change in range (with the exception of a General Salary Increases), may reduce a faculty unit employee's eligibility for an SSI. Examples of such increases include:
    - Systemwide and Campus Equity Increases,
    - Market Increases,
    - Post-Promotion Increase Program, and
    - Salary Recovery Adjustments.
  
- ✓ Faculty members who have **received prior SSIs**:
  - Within a salary range, employees are limited to:
    - a maximum of four (4) steps on the salary schedule that was in effect prior to the 1995-1998 Collective Bargaining Agreement, or
    - eight (8) SSIs per range under the salary schedule that was in effect since 1998, or
    - a combination of the two that does not exceed eight (8) SSIs per range on the salary schedule.

**Anniversary Dates and SSI Counters**

- ***Campuses are responsible for reviewing and updating anniversary dates and counters as necessary. All anniversary dates should be reviewed and updated prior to July 1, 2023 in order to accurately determine eligibility for SSIs in academic year 2023-2024. Anniversary dates must then be updated as SSIs become effective.***

- Historically, campuses were instructed to establish the anniversary date for tenured and probationary faculty based on the pay period of the original appointment date. The anniversary date was updated when an SSI was awarded. When an SSI was not negotiated for a particular year, the anniversary date rolled forward.
  - Regardless of whether an SSI is awarded or denied, if SSI eligibility remains, the anniversary date must be advanced by one year.

**Note:** The last SSI granted for Unit 3 faculty members was awarded in FY 2021/2022. It is therefore important that campuses review anniversary dates for accuracy and for non-qualifying pay periods (such as personal leaves without pay).

- **A tenured or probationary faculty unit employee who meets other eligibility criteria and has at least one year of qualifying service since either (a) an appointment to the range or (b) an award of the last SSI in that range is eligible for an SSI on the employee's anniversary date in FY 2023/2024.**
- As a reminder, faculty unit employees who have no more SSI eligibility based on having reached or exceeded the SSI maximum should have their anniversary dates set to "9999".
- Faculty may receive up to a maximum of eight (8) SSIs per range. The SSI counter historically calculated eligibility for potential SSIs in the range based on the number of 2.5% increases it would take to reach the SSI max. **Given the use of 2.65% as an SSI amount since 2000/2001, the use of 2.5% results in errors accumulating in the counter.**

Campuses should recalculate the SSI counters for faculty based on the number of 2.65% increases necessary to reach the SSI maximum (including any FMI adjustments). Fractions should be rounded up (e.g., someone eligible for one full SSI and one partial SSI would be assigned a counter of "2").

- Because SSI eligibility for **lecturers and other temporary faculty** unit employees depends on the number of units taught (or equivalent service) since the last SSI, it is not possible to establish an anniversary date for part-time temporary faculty.
  - For temporary faculty, PIMS Data Item 330 - Anniversary Date should be entered with a date (MM/YY) or "NONE" as appropriate, and Item 958 - Final Salary Anniversary Date/SSI Counter is indicated as "NONE-0". However, for temporary faculty employees with no remaining SSI eligibility in their current range, the Anniversary Date (Item 330) must be "99/99", and Final Salary Anniversary Date/SSI Counter (Item 958) must be indicated as "9999-0".

In terms of processing/sequencing order, the anniversary dates must be reviewed and rolled forward in order to accurately determine SSI eligibility. If performance is deemed satisfactory and SSI approved, the SSI transaction should be processed and the anniversary date updated to align with the SSI effective date. If a GSI is later approved, it would be effective July 1 and would be applied to the new SSI salary. Note, the SSI salary should automatically update in PIMS if the SSI is keyed prior to a GSI mass update. Campuses are responsible for ensuring the GSI and SSI are applied appropriately.

#### Considerations for Tenured and Probationary Faculty

- ✓ An SSI of 2.65% or the amount necessary to bring the employee to the SSI maximum (after adjustments for FMIs, if any) will be provided to eligible employees in fiscal year 2023/2024, effective on the first day of the pay period of the employee's anniversary date.
  - For academic year employees, the anniversary date is generally the first pay period of the fall term. **Campuses are responsible for establishing the anniversary dates, final anniversary dates and counters for all R03 positions. In addition, campuses are responsible for manually processing SSIs for all eligible R03 employees via the MSA transaction.**

- ✓ Promotions normally take effect at the beginning of the fall term, which in most cases is also the anniversary date for the employee. Since SSIs are awarded based on eligibility in a given range, if a faculty unit employee is entitled to a promotion as well as an SSI, and the two actions have the same effective date, the SSI should be applied first. The promotion will then be applied to the salary after the application of the SSI. Any potential range elevation must be assessed for eligibility after the SSI process has been concluded and in accordance with [HR/Salary 2022-07](#).

#### Considerations for Temporary Faculty

- ✓ 0.8 years of service is considered fulltime for the purposes of assessing SSI eligibility. Service can be calculated in one of two ways:
  - By considering units: Pursuant to Article 12.10, temporary faculty who completed 24 units in a range on a semester campus since the last SSI (or 36 units on a quarter campus) in the same department or equivalent unit during the Fall 2022 and Spring 2023 terms are eligible to receive an SSI in fiscal year 2023/2024 or
  - By considering time base. Part-time temporary faculty unit employees in non-academic year appointments (12-month or 10-month) who meet other eligibility tests are eligible for an SSI if they have accumulated the equivalent of 0.8 years of service in the same range and department or equivalent unit since the last SSI. For example, a part-time, 10-month temporary librarian with an appointment of at least 0.8 for one year would be eligible for the SSI, as would a part-time, 10-month temporary librarian with a time base of 0.4 for two years). Time base is calculated within the timeframe of the appointment.
- ✓ Temporary faculty unit employees with appointments in more than one department or equivalent unit must be reviewed for SSI eligibility independently in each department. Pursuant to provision 21.23.c, units taught in a **state-supported** summer session shall be credited toward SSI eligibility. Campuses are responsible for processing these SSIs via the MSA transaction. Refer to provision 12.10 for further SSI eligibility requirements.

#### Considerations for Department Chairs

- ✓ **It is not the intent of the CBA to prevent an otherwise SSI-eligible department chair from receiving an SSI.** In some cases, however, individuals with remaining SSI eligibility based on their instructional faculty appointments have reached or exceeded the SSI maximum in the department chair classification because of the incorporation of the department chair increase into the base salary. Individuals appointed to a department chair assignment typically fall into one of the following appointment types:
  - Full Time Department Chair (i.e., 1.0 assignment)
  - Department Chair with Instructional Faculty assignment in one position (i.e., 1.0 timebase in department chair class, with PIMS Item 718 identifying the department chair timebase fraction)
  - Department Chair and Instructional Faculty assignments in separate concurrent positions
- ✓ To ensure that individuals appointed in these assignments receive the maximum SSI to which they are entitled, the following instructions should be applied effective fiscal year 2023/2024:
  - For individuals in full time department chair assignments (1.0 timebase), FMI and department chair salary increase (formally called “stipend”) amounts (both flat amounts and additional percentage) should be subtracted from the total salary to determine the maximum SSI percentage available on the remainder, which is the instructional faculty base salary. After the SSI percentage is determined based on the instructional base salary, that percentage is applied to the original department chair salary (Item 820) to determine the new chair salary, **regardless of the SSI maximum for the department chair class and inclusive of department chair salary increase.**
  - For individuals appointed in a department chair position with a less than full time department chair timebase fraction, or if appointed in a separate concurrent department chair position that is less than fulltime, the percentage of SSI received in the instructional faculty assignment will be applied to the entire salary (Item 820) of the department chair assignment, inclusive of the department chair salary increase amount (formally called “stipend”), regardless of the SSI maximum for the department chair class. Note that rules for subtracting FMI awards from the instructional faculty salary in order to determine SSI eligibility also apply.

- Also note that if the department chair subsequently returns to a 100% instructional faculty position, for any individual with an SSI counter greater than zero, the campus should re-evaluate the salary after the chair increase has been removed to determine further SSI eligibility.
- ✓ Refer to [HR/Salary 2007-25](#) for examples of determining SSI eligibility for department chair positions. Additional information on department chairs can be found on the [Faculty Salary Programs](#) webpage on CSYou.

Considerations for FERP Faculty

- ✓ FERP faculty unit employees who satisfy the requirements to receive an SSI in fiscal year 2023/2024 shall have the SSI posted to the employee's record via MSA Transaction.

The following processing instructions are provided in **Attachment A**:

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

Questions regarding this technical letter may be directed to the CO Human Resources Management Team at [hradmin@calstate.edu](mailto:hradmin@calstate.edu) | (562) 951-4411. For your convenience, this HR memorandum is also available on the CSYou website at: <https://csyou.calstate.edu/Policies/HRPolicies/Forms/Default.aspx>.

BR/SF

Attachment

**PROCESSING INSTRUCTIONS**

**SALARY INCREASE PROGRAM I – Service Salary Increase**

<b>PAY SCALES IMPACT:</b>	
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

<b>EMPLOYMENT HISTORY (EH)/PAYROLL IMPACT:</b>	
Processing Responsibility:	Campuses
Processing Date(s):	Varies
Effective Date:	<ul style="list-style-type: none"> <li>• SSI = Beginning of the pay period of the employee’s Anniversary Date for fiscal year 2023/2024</li> <li>• SSI Denial = Beginning of pay period of the employee’s Anniversary Date (Item 330) in fiscal year 2023/2024</li> </ul>
PIMS Transactions:	<ul style="list-style-type: none"> <li>• SSI = MSA Transaction</li> <li>• SSI Denial = 330 Transaction</li> </ul>
Detailed Transaction Code (Item 719):	N/A
EH Remarks (Item 215):	HR/SA 2023-07
Pay Amount:	2.65% or up to the SSI Maximum after subtracting cumulative FMIs
Pay Form:	Base salary increase
Anniversary Date (Item 330):	Recalculate as appropriate based upon the new salary and the SSI maximum in the new rank
Final Salary Anniversary Date/ SSI Counter (Item 958):	Recalculate as appropriate based upon the new salary, the SSI maximum in the new rank, and the number of 2.65% increments available to the SSI maximum.
Employees on Leave:	<ul style="list-style-type: none"> <li>• Increases for employees on NDI supplementing with Catastrophic Leave (S49 Transaction, Item 957 = 40) are based on the employee’s anniversary date.</li> <li>• Anniversary dates for employees on leave or other non-pay status are to be evaluated and adjusted as appropriate on the return from leave.</li> </ul>
Additional Information:	<ul style="list-style-type: none"> <li>• For probationary/permanent faculty, Anniversary Date (Item 330) and Final Salary Anniversary Date/SSI Counter (Item 958) must be set as appropriate for granted or denied SSIs.</li> <li>• Non-qualifying pay periods must be subtracted and Anniversary Dates adjusted accordingly before SSIs can be awarded.</li> <li>• Docks and salary overpayments may be impacted by this change.</li> </ul> <p><b>Campuses are responsible for making appropriate adjustments.</b></p>

<b>CMS PROCESSING INFORMATION:</b>	
Workforce Administration:	<ul style="list-style-type: none"> <li>• Action Reason: PAY/SSI (MSA: Pay Rate Change/Service Salary Increase)               <ul style="list-style-type: none"> <li>○ Effective Date: Beginning of the pay period of the employee’s Anniversary Date for fiscal year 2023/2024</li> <li>○ Union Code: R03</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ Anniversary Code (Item 330): Update as instructed above</li> <li>○ Faculty SSI Remaining (Item 958): Update as instructed above</li> <li>○ Empl History Remarks (Item 215): HR/SA 2023-07</li> <li>● Action Reason: DTA/DNS (330: Data Change/SSI Denial)           <ul style="list-style-type: none"> <li>○ Effective Date: Beginning of the pay period of the employee's Anniversary Date for fiscal year 2023/2024</li> <li>○ Union Code: R03</li> <li>○ Anniversary Code (Item 330): Update as instructed above</li> <li>○ Faculty SSI Remaining (Item 958): Update as instructed above</li> <li>○ Empl History Remarks (Item 215): HR/SA 2023-07</li> </ul> </li> </ul>
Temporary Faculty:	Same as above
Benefits:	N/A
Time and Labor:	N/A
Absence Management:	N/A
Labor Cost Distribution:	N/A
Additional Instructions:	<ul style="list-style-type: none"> <li>● The CMS processing order is as follows:           <ol style="list-style-type: none"> <li>1. CRO</li> <li>2. Review SSI eligibility</li> <li>3. PAY/SSI (MSA) or DTA/DNS (330) for SSI denial</li> </ol> </li> </ul>

**PROCESSING INSTRUCTIONS**

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

<b>PAY SCALES IMPACT:</b>	
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

<b>EMPLOYMENT HISTORY (EH)/PAYROLL IMPACT:</b>	
Processing Responsibility:	Campuses will reset Anniversary Dates, Final Salary Anniversary Dates, and SSI counters as necessary for permanent/probationary faculty.
Processing Date(s):	Varies
Effective Date:	07/01/23 or appointment/reinstatement, if later
PIMS Transactions:	CRO
Detailed Transaction Code (Item 719):	N/A
EH Remarks (Item 215):	HR/SA 2023-07
Pay Amount:	N/A
Pay Form:	N/A
Employees on Leave:	Permanent and probationary faculty on an unpaid leave of absence as of 07/01/23, should have their Anniversary Date entered upon return from leave.
Additional Information:	<ul style="list-style-type: none"> <li>• Anniversary Date (Item 330), Final Salary Anniversary Date and Counter (Item 958) should be reviewed by the campuses for accuracy and adjusted as necessary.</li> <li>• Non-qualifying pay periods must be subtracted and Anniversary Date fields adjusted accordingly before SSIs can be awarded for fiscal year 2023/2024.</li> <li>• Anniversary Date (Item 330) fields must be entered for temporary appointments. For temporary faculty, PIMS Data Item 330 - Anniversary Date must be may entered with a date (MM/YY) or "NONE" as appropriate, and Item 958 - Final Salary Anniversary Date/SSI Counter is "NONE-0". However, for temporary faculty employees with no remaining SSI eligibility in their current range, the Anniversary Date (Item 330) must be "99/99", and Final Salary Anniversary Date/SSI Counter (Item 958) must be "9999-0" or MAX-0 at salary maximum.</li> <li>• Employees who have separated after 07/01/23 and are due an SSI prior to separation, must have a correct Anniversary Date and Final Salary Anniversary Date/SSI Counter on their employment record prior to posting a separation transaction.</li> <li>• Separation transactions that have already been processed must be corrected to reflect the employees accurate Anniversary Date.</li> <li>• Employees on IDL/TD remain SSI eligible.</li> </ul>



	<ul style="list-style-type: none"> <li>• Refer to Article 31 of the Collective Bargaining Agreement related to Faculty Salaries, specifically Provisions 31.17-31.24 on SSIs, for detailed information.</li> </ul>
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<b>CMS PROCESSING INFORMATION:</b>	
Workforce Administration:	<ul style="list-style-type: none"> <li>• Action Reason: PAY/MOU (CRO: Pay Rate Change/Memorandum of Understanding)               <ul style="list-style-type: none"> <li>○ Effective Date: 07/01/23 or appointment or reinstatement, if later</li> <li>○ Campuses will correct invalid and/or incorrect values for the following PeopleSoft fields as instructed above:                   <ul style="list-style-type: none"> <li>▪ Anniversary Month</li> <li>▪ Anniversary Year</li> <li>▪ Anniversary Code</li> <li>▪ Faculty SSI Remaining</li> <li>▪ Last SSI Eligibility Date</li> </ul> </li> <li>○ Union Code: R03</li> <li>○ Empl History Remarks (Item 215): HR/SA 2023-07</li> </ul> </li> </ul>
Temporary Faculty:	Same as above
Benefits:	N/A
Time and Labor:	N/A
Absence Management:	N/A
Labor Cost Distribution:	N/A
Additional Instructions:	N/A