Professional Expert PEX eForm

PEX - Overview

- <u>When to Use</u>
  - To compensate employees for non-academic, non-classified services on a short-term, temporary basis for a specific project. Should not be used for independent contractors.

- <u>Requirements</u>
  - Professional expertise and/or specialized knowledge in a particular field
  - Duties cannot fit into an existing LRCCD job description
  - Documentation required to Work is not part of the classified service, so it is not CalPERS creditable (employees pay into PARS)
  - demonstrate that the employee is an "expert" (resume, certificate, etc.)

- <u>Pay Rate</u>
  - Payment is hourly and rate is based on level of work using the professional expert salary schedule

PEX - Overview

- <u>920 Hour Limit</u>
    - The maximum total hours an employee may work in a fiscal year (July 1st – June 30th)
        - HR will keep track and notify employees who are close to this limit
    - Limit Applies to Classified Temporary Intents and Professional Expert Agreements
    - Employees <u>may not</u> work concurrently as a Professional Expert and in a Temporary Classified assignment

PEX – Overview

- Who **Can** Work a PEX?
  - Current Los Rios Employees
    - ✔ Certificated Employees: full-time faculty, adjunct faculty, substitutes
  - Other Employees
    - ✔ External Employees: paperwork for new hires should be submitted **at least two weeks** prior to the start date. Original paperwork required. Resume required.
- Who **Cannot** Work a PEX?
    - 🚫 Permanent Classified Employees
    - 🚫 Temporary Classified Employees & Student Help
    - 🚫 Current Managers and Administrators
    - 🚫 Faculty on Leave including Type C

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PEX - Overview

- <u>PEX vs. Independent Contractor</u>
  - Can be determined by reviewing the Los Rios "Independent Contractor vs. Employee" Guidelines (Form GS-79), located on the Purchasing webpage:
  - For assistance in making this determination, please contact the Purchasing Department at 916-568-3071
  - Independent Contractors would not be hired on a PEX (PEXs are used when someone is considered an employee)

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If you choose PEX as Form Type

- To meet the PEX threshold the assignment must require expertise and should not be for credit activity.

Determine Assignment Type

*Is this an ESA or PEX? [▼]

[Save] [Submit]

Determine Assignment Type

*Is this an ESA or PEX? [PEX ▼]

*Does the PEX Assignment Require Expertise? [▼]

*Is This PEX Assignment a "For-Credit" Activity? [▼]

[Save] [Submit]

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eForm Sections

⊕ Add an ESA Form : ESA Information

Employee Information

Does the employee have a Los Rios Employee ID? [▾] ← Yes

First Name

Middle Initial

Last Name

Asking if the person has an employee ID is clearer than asking about their ESA history.—The AI will do the checks to validate previous work and ESA history.

⊕ Add an ESA Form : ESA Information

Employee Information

Does the employee have a Los Rios Employee ID? [Yes ▾]

First Name Steven

Middle Initial E.

Last Name Dunmore

• **Employee Information**
  • **Does this employee have an employee ID?**
    • **Yes- then you will be prompted to enter the employee ID**
    • **No- then you will be prompted to enter new employee data: Social, full name**

*Empl ID [1595190] 🔍   ← Enter ID

This employee id has previous ESA.

When you enter the employee ID and ==tab== out of the field, then the employee information will populate

Preferred First Name

Name Suffix

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No Los Rios Employee ID

Add an ESA Form : ESA Information   Form ID 101989

Complete the sections as outlined

Employee Information

Does the employee have a Los Rios Employee ID? No

This will be the first ESA for the employee.

*First Name	
Middle Initial	
*Last Name	
*Date of Birth	

Preferred First Name

Name Suffix

*Social Security #

(Enter the name as it appears on their Social Security Card, no nicknames)

Address Information

*Street

*City

*State   *Postal Code

*Email Address   *Telephone

This employee does not have current system access to complete their portion of this eForm.

Once the ISA, Hiring Manager, Authorized Signers and HR have completed the review of this eForm and it has been fully approved, this employee will be granted system access and sent information to answer the employee questions.

Hiring Information

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Required New Hire Documents

- First time ESA or PEX assignment with Los Rios
  - Brand new to Los Rios or existing Employees
  - Please locate the Forms here: [Hiring ESA and PEX](#)
  - The required documents are listed under the following categories:
    - First-Time ESA for Current Employee
    - First-Time ESA for Non-Employee **— Fingerprint** – Live Scan Receipt and Payroll Deduction Form. Fingerprint packet is available through the supervisor or the campus Business Office.
    - First-Time PEX for Current Employee
    - First-Time PEX for Non-Employee **- Fingerprint** – Live Scan Receipt and Payroll Deduction Form. Fingerprint packet is available through the supervisor or the campus Business Office.

      - Here is a sample of the First time ESA Documents: Download all [combined First-Time ESA and Non-Employee forms](#)

Hiring Information

Please provide an ESA number which is a maximum of 5 characters (alphabetic and/or numeric).

Select the Work Location and Division from the dropdown list. These fields must have a value before you can click on the magnify glass next to the Position Number field to choose the Position Number.

For fiscal year, please enter the 4-digit year. Example: For July 2022 - June 2023, enter 2023 into the field. You can provide Term Start and End Dates for this assignment further down on the form in one of the grid sections.

*ESA Number

*Work Location

Division

*Position Number

*Fiscal Year 0

Hiring Information

- **Please note directions above**
- Easiest to tab from field to field (Enter will send you to the top of the form)

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PEX type

- PEX Title choices:
Consultant
NFC (Not for credit) Presenter
ARC and Ethan Way have a 3rd option of
Contract Trainer

*PEX Number 002T

*Work Location American River College ⌄

Division Instructional ⌄

*PEX Title ⌄

*Position Number 🔍

*Fiscal Year 0

Job Code

PEX Pay Rate

PEX hourly rates are determined by the level of expertise. The pay rate and level information is listed on the Salary Schedule for Professional Expert Agreements found on the LRCCD Salary Schedules web page. Please review the definitions and information provided to determine the hourly rate. Class 001, Step based on expertise level I-IV, determined by hiring manager.

- Exception to the above are for PEX's for the **Adjunct College Service Pilot Program** - The PEX process for placement for this pilot program does not differ from ESA process. Use the Adjuncts current Class/Step placement on B2/B3 Salary Schedule for the corresponding semester (Fall or Spring).

For additional payment information, please review the Salary Schedules from the Human Resources website.

Use the table below to select the Step.

Consultant:

Employee provides professional advice and/or services in their area of expertise.

Plans, organizes and/or develops workshops, not-for-credit programs or trainings, and supports specific projects.

Consultant I	Provides consulting services related to area of expertise.	$35
Consultant II	Provides advanced consulting services related to area of expertise.	$45
Consultant III	Provides advanced, complex consulting services related to area of expertise.	$55
Consultant IV	In addition to responsibilities of a Consultant III, responsible for overall direction of specific project.	$65

*Step [🔍]

Hourly Rate $0.00

Salary Administration Plan ESP   PEX -Professional Expert Agree

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PEX – 60% and 67% Law

No FTE

Fall and Spring – Adjunct or PEX only employee

FTE

Fall and Spring – Full-time or LTT Faculty

Summer all PEX's limited to 60% FTE

Budget Selection

- If PEX you must use 2305 as the Account Code.
  - Delete the place holder account code after you have added your active Budget string.

Assignment Details

*Section 1 Detailed Description of Services to be Rendered:

Both sections need to be completed with as much detail as possible.

*Section 2 Statement of Specialized Knowledge/Expertise for PEX

Workflow Approvers for your campus

Only Select a second authorized signer if you are using another campuses budget etc..-This is very rare