

1.11 APPOINTMENTS AND DISTRIBUTIONS

USE THIS CHAPTER IN CONJUNCTION WITH [SECTION 2.1 – APPOINTMENT CODING](#) TO DETERMINE PROPER APPOINTMENT CODING.

In the Payroll/Personnel On-line System, employee data is stored as data elements. These data elements comprise all the information which payroll, accounting and human resources offices have identified as critical for paying employees correctly and for gathering important information about an employee's appointment status.

To facilitate on-line entry/update, these data elements have been grouped by general categories and displayed on function screens. The following Menu lists the individual functions by function code:

THE OEU FUNCTION CODE MENU

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ucmvsb.ucop.edu - TN3270/TN5250 Connection
Session Edit View Commands Script Help
UCFNU0-M0795      SCT EDB Entry/Update      06/13/03 10:11:49
                   Function Code Menu      Userid: SCTRNG1

- BUND Bundle Menu
- EEID Employee Identification
- EPD1 Employee Personal Data 1
- EPD2 Employee Personal Data 2
- EALN Alien Information
- ETAX Tax Information - Central Ofc
- XTAX Tax Information - Departments
- ECHK Check/Surepay Disposition
- EDED Miscellaneous Deductions
- EACD Academic Service
- ELIC License/Certificate Data
- EHON Honors Data
- EAWD Awards Data
- EBND US Savings Bonds
- EWSP Work Study Program Limits
- EMIS Miscellaneous Information
- WHO Employee Browse
- EAPC Appts./Distributions-Condensed
- EAPP Appointments/Distributions
- EPER Personnel-Miscellaneous
- ELVE Leave of Absence Data
- EBCC Background Check Data
- ESEP Separation
- ELOF Layoff Data
- ERET Retirement Information
- EINS Insurance Enrollment
- EELI Executive Life Insurance
- EDEP Dependent Data
- EGTN Misc. Deductions - Central
- EDEM Misc. Deductions - Mass Entry
- EDES Data Element Selection
- EUUCI University Contribution Ind.

Next Func: █ ID: _____ Name: _____ SSN: _____

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F: 1-Help      3-PrevMenu  4-Print
F: 8-Forward  9-Jump      12-Exit

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Because most payroll/personnel actions require changing data elements on more than one function screen, these functions have been grouped into "bundles" to facilitate the process of making the

appropriate additions, deletions, or changes to update the EDB for each personnel action. Bundles contain all the relevant data fields that will need to be added or changed for a particular payroll/personnel action, and these fields are highlighted within each bundle.

The following Menu lists available bundles by function code:

BUNDLES MENU

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ucmvsb.ucop.edu - TN3270/TN5250 Connection
Session Edit View Commands Script Help
UCFNU0-M0795      SCT EDB Entry/Update      06/13/03 10:12:10
                   Bundle Menu      Userid: SCTRNG1

- SHIR Staff New Hire
- SREH Staff Rehire
- SCLS Staff Chng: Recl/Prom/Trn/Dem
- SRNW Staff Renew Appt
- SMRT Staff Merit/Six Month Increase
- SLOA Staff LWOP/Chng Leave Rtrn Dte
- STEM Staff Temp Action
- AUHI Academic Student Hire
- AURH Academic Student Rehire
- UHIR Stud New Hire
- UREH Stud Rehire
- LIMI Casual to Career/Carr to Cas
- ADDL Additional Empl
- SEPR Separation
- PCNT Chng % Time Worked
- TERM Term Appt & Chg Hm Dept
- STRT Staff/Acad Reduction in Time
- SRDC Salary Reduction Defined Contr
- INSD Insurance, Dependents
- NEWE New Enrollee/Employee
- NTCZ Naturalized Citizen

Next Func: █ ID: _____ Name: _____ SSN: _____

====>
F: 1-Help      3-PrevMenu  4-Print      12-Exit
F: 9-Jump

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Employee Database

The employee data base (EDB) is a computer file of employee records organized by employee identification number or social security number. These records may include:

- Personal Data (name, address, birthdate)

- Personnel Data (next salary review date, separation reason)
- Benefits and payroll data (retirement system code, personnel program, % of time worked)
- Hours and dollars balance
- Deduction data

Three Levels of Data in the EDB

Hierarchy of Employee Information



Employee Level: Info. not linked to individual appointments/distributions

Appointment Level: defines the employee's relationship with the University



Distribution Level: describes the method, conditions, and sources of pay for an appointment



Employee Level

Employee level information applies to the whole person and describes aspects of the employee that are not linked to individual appointments and pay distributions. Most of the function screens contain employee level data. Employee level actions include:

- Initial Hire

- Rehire
- Leave of Absence
- Separation

Appointment Level

Appointment level information describes and defines the intent of the employee's relationship with the University and the terms and conditions of employment and should be reflective of the effort (percentage of time) that is required to perform the duties on a regular basis. Appointment level data is found on the EAPP function. Appointment level actions include:

- Promotion
- Lateral Transfer
- Renewal of Appointment
- Casual to Career
- Reclassification

Distribution Level

Distribution level information describes the method, conditions, and sources of pay for an appointment. Distribution level data, like appointment level data, is found on the EAPP function. Distribution level actions include:

- Change in Funding
- Merit Increase
- Range Adjustment
- Six-Month Increase
- Percent of Time Change
- Other Pay Rate Change

Personnel Action Codes

Personnel Action Codes reflect and record the relationship between the employee and his/her appointments and distributions. These personnel action codes are categorized by Employee Level, Appointment Level, and Distribution Level actions.

Personnel Action Codes, whether entered or derived, help to record information about an action in the employee's payroll/personnel history. The ability of the PPS to maintain accurate historical data and generate reports summarizing actions depends on the correct action codes being entered.

Personnel action codes are normally associated with the begin date of the related appointment or distribution. By beginning new appointments or distributions, and using the correct action code, you ensure that payroll history is recorded in the EDB in a meaningful way.

Since action codes may be entered by OEU users or may be system derived, refer to [Appendix B, Personnel Action Codes](#). This appendix explains the codes and their usage.

Appointment Data Elements

An appointment is synonymous with position and characterized by a unique set of data elements. Because the employee may hold more than one appointment, the appointment number uniquely identifies each appointment and its associated data on the database. Up to nine appointments may be utilized for any employee. Appointment Numbers (APPT) are assigned in multiples of ten, i.e., Appt 10, Appt 20, etc.

Specific data elements associated at the appointment level and contained on the EAPP function are:

Personnel Program Code	<p>Identifies the Personnel Program under which the appointment is held.</p> <ul style="list-style-type: none"> • A -- Academic • 1 -- Support Staff & Professional • 2 -- Management & Senior Professional • Code values prior to July 1, 1996: • <i>E -- Executive</i> • <i>M -- Management and Professional (MAP)</i> • <i>P -- Administrative and Professional (A&PS)</i> • <i>S - Staff (SPP and those titles covered collective bargaining units)</i> • A -- Academic
Appointment Type Code	<p>This describes the nature of the appointment</p> <ul style="list-style-type: none"> 1 -- Contract 2 -- Regular/Career 3 -- Casual 4 -- Casual/Restricted 5 -- Academic 6 -- Per Diem 7 -- Partial Year/Career
Basis	<p>This indicates the service period on which an appointment is based.</p> <p>Valid Codes: 09, 10, 11, 12</p>

Paid Over	Code indicating the number of months in the year over which the individual's salary for the appointment is paid. Valid Codes: 09, 10, 11, 12
Appointment Begin and End Dates	Date on which appointment is effective and the expected ending date in MMDDYY format.
Duration	Indicates the duration of the position. Casual appointments have no duration code entered. Duration codes are: <ul style="list-style-type: none"> • Indefinite (I) • Tenured (T) • For Budgetary Purposes Only (B) • For Visa Purposes Only (V) – see footnote*
Department	A system derived code indicating the department or other administrative unit associated with the appointment.
Title Code	This is the official University four-digit code for the position.
Grade	Appropriate salary grade for the position.
Percent of Full-Time	Indicates the percentage of full time that the employee is expected to devote to this appointment. 100% of full time is entered as 1.00.

Fixed or Variable	Indicates whether the appointment percentage of time worked is established as fixed or variable. F = FIXED (time-code must = T or R) V = VARIABLE (time-code must = A, C or Z)
Annual/ Hourly Rate	The full time rate of pay (annual, hourly, or by-agreement amount) associated with the appointment.
Rate	A code indicating whether the pay is Annual, Hourly, or By-Agreement. A = Annual H = Hourly B = By-Agreement
Pay Schedule	Indicates pay schedule on which the appointment is paid. MO -- Monthly current schedule (Exempt employee or by-agreement) BW -- Biweekly schedule (Non-exempt, hourly rate of pay or by-agreement)

Time-Code	<p>Code indicating the method for reporting time worked in an appointment.</p> <ul style="list-style-type: none"> • A -- Positive by account/fund on UPAY644E (action required to generate pay) • Z – Positive, paid by on-line Roster in OPTRS (action required to generate pay) • C -- Positive time reporting and paid via CruzPay (currently limited to hourly undergrad student titles) • T -- Exception by account/fund on UPAY644E (pay generates automatically) • R – Exception, paid by on-line Roster in OPTRS (pay generates automatically) • N -- Positive - time sheet not required
Leave Accrual Code	<p>Leave accrual rate for sick leave and vacation leave. Reference the appropriate personnel policy or collective bargaining agreement for specific leave accrual guidance.</p>

"V" duration coding would allow career derivations to occur.

*Appointment/distribution data should be entered per the visa end date (not per the anticipated appointment - or budgetary - end date), and the system will derive U/E as appropriate. Duration code V should not be used on appointments that are not already designated "career". The intent of the V code is to allow derivation to occur on a career appointment even though the actual duration of the appointment (because of the constraints of the visa) would not, by itself, allow derivation.

For example, an employee had a visa end date of 10/31/08, but the position they were hired into had a "budgetary" end date of 06/30/09. The visa end date should take precedence in determining the appointment end date for this employee. Even though it's a "career" appointment, it would only be set up through the current visa end date of the employee hired into it, and the

Distribution Data Elements

The distribution defines the type of service for payment, identifies the funding source to be charged for the payment, with the percentage of time chargeable and the begin and ending dates through which the fund source is active for payment.

The distribution line drives the time-reporting worksheet in which the unit pays the employee. Each appointment can have up to eight distributions. Distributions are numbered sequentially to correspond to the appointment numbers. For example:

Appointment 10 will have Distribution 11, 12, 13, 14, 15, etc.
Appointment 20 will have Distribution 21, 22, 23, 24, 25, etc.

Specific distribution elements are:

L/Acct/CC/ Fund/PC/Sub	<p>Full Accounting Unit (FAU):</p> <p>Expenditure Account Location Code</p> <p>Account Number</p> <p>Cost Center</p> <p>Fund Number</p> <p>Project Code</p> <p>Subaccount Code</p> <p>These codes indicate where the specified distribution pay is to be charged.</p>
Full-Time Equivalent (FTE)	<p>Corresponds to the staffing list and indicates the percentage of budgeted position represented by this distribution.</p> <p>If the FTE is 100% then 1.00 is entered. An employee working a partial year appointment will have an FTE adjusted according to the # of months on furlough.</p>

Distribution percent	Indicates the percentage of the salary to be charged to the L/Account/CC/Fund/PC/Sub. 100% of time is entered as 1.0000.
Payment Begin and End dates	Dates the payroll system begins and stops pay of the distribution. These dates are entered in MMDDYY format. Indefinite distributions with no ending dates are entered as 999999.
Step	Indicates the appropriate step placement that agrees with the employee's monthly rate of pay
O/A	This code indicates whether the employee's pay rate is off scale or above scale in relation to the salary range.
Rate/Amount	Indicates either the monthly (nnnn.nn), hourly (nn.nnnn) or by-agreement amount (nnnn.nn) of pay for the specified distribution.
Description of Service (DOS)	Code indicating the type of service or type of pay associated with the appointment.
PRQ	<p>Code indicating the type of perquisite provided.</p> <p>R = Room</p> <p>M = Meals</p> <p>H = Housing Allowance (used with DOS codes EHA and FHA)</p>
DUC	System derived code for collective bargaining purposes.
WSP	Code indicating the type of work-study program associated with a work-study distribution.