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## 1.12 END/BEGIN CODING METHOD

### End/Begin Coding Method

When coding appointment and distribution data, the proper method to use for most transactions is the end/begin method. This method of recording appointments and distributions will ensure accurate data and maintain the integrity of system generated employee history.

Changes to an employee's appointment and distribution should be processed by ending the previous appointment or distribution on the last day the old data is in effect, and beginning a new appointment or distribution the next day.

The begin date of an appointment represents the date the employee and the University began a specific relationship with defined terms and conditions based upon the defined appointment. Accordingly, the appointment date should not be changed in pay rate, temporary percentage of time changes, account funding changes and most distribution changes. It is appropriate to end the appointment and set up a new appointment with begin dates when processing the following actions:

- Reclassification
- Acceptance of another appointment or position
- Casual to career
- Incorrect title code

The data elements within the appointment and distribution lines must be accurately maintained to assure correct payment of an employee.

There are actions that do *not* require a stop to the current appointment, rather you would only stop the current distribution,

and start a new distribution to reflect the change to the employees record. Examples of these transactions include the following:

- Temporary increase or decrease in time
- Merit Increases
- Equity Increase
- Six Month Increase
- Funding changes

### Using the End/Begin Method

Most payroll/personnel actions affect the employee's appointment and/or distribution level data, which is updated in the EDB via the EAPP screen. When changing appointment and/or distribution data, always use the following general procedure:

1. **END** the current appointment and/or distribution.
2. **BEGIN** a new appointment and/or distribution.

If you follow this general procedure for every personnel action, you will achieve these three important goals:

1. The employee will be paid correctly.
2. Using the procedure of ending the old appointment/distribution and beginning a new one will eliminate the possibility of accidentally overwriting the current pay line.
3. Payroll/personnel history will be accurate.

## Standard and Shortcut Procedures

There are two ways to follow the general procedure of ending the current appointment and/or distribution and beginning a new appointment and /or distribution:

1. Standard Method - using the “**add x**” command
2. Shortcut Method - using the “**copy xx to yy**” command

### Standard Method

#### Step One

End the current appointment or distribution using the following procedure:

1. Move to the *Appointment End date field* and type the **new end date**.
2. If the *Appointment Duration* is Tenured (T) or Indefinite (I) type an **asterisk (\*)** to delete the current information.
3. Move to the *Distribution End Date field* and type the **new end date**.
4. Repeat for multiple distributions, if applicable.

#### Step Two

Add the new appointment or distribution using the following procedure:

1. Move to the command line.
2. Type “**add a**” to assign the next available appointment number.
3. Press **Enter** to display the **EAPP** function with the new appointment line.
4. Enter data in the required fields on the EAPP function.
5. Move to the command line and type “**add d**” to assign the next available distribution number.
6. Press **Enter** to position the cursor at the new distribution line.
7. Enter the data in the required fields on the new distribution line.
8. Repeat steps 5-7 for multiple distributions, if applicable.

See *Consistency Edit Messages (ECON)* in [Section 1.6, System Messages](#) for more information and instructions.

### Appointment Level Example

You should use the end/begin method to enter an appointment level action, such as a Reclass, into the EDB.

For example, you have received approval to reclass an employee from Student Affairs Officer I to Student Affairs Officer II effective 10/01/95. The employees current appointment and distribution are shown below.

The screenshot shows a terminal window with the following data:

```

TN3270 - uccmvsv to host uccmvsv.ucop.edu
Session Edit Commands Settings Help
PPEAPP0-E0943 SCT EDB Entry/Update 10/12/95 11:17:19
10/09/95 20:33:23 Appointments/Distributions Userid: SCPERCLS
ID: 010000994 Name: RECLASS, RETRO T Pri Pay: MO
PAF Gen No: 2 Pg 01 of 01
Appt Actions Pgm Typ Bas Pd Ovr Appt Begin Appt End Dur Dept
10 P 2 - - - 080194 999999 I
Title Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv
4354 STUDENT AFFAIRS OFFICER I 1 1.00 E 29200.00 A MO I A
Dist Actions L Acct CC Fund PC S FTE Dis %
11 Z 766033 70800 1 ACCT DESCRIP UNAVAIL 1.00 1.0000
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
080194 999999 - - 2433.33 REG - - -
Dist Actions L Acct CC Fund PC S FTE Dis %
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
Next Func: ID: Name: SSN:
===>
F: 1-Help 3-PrevMenu 4-Print 5-Update
F: 9-Jump 12-Exit
IBM-3278-2-E 11:22:34
    
```

You would process this action in the following sequence:

1. First, end the current appointment effective 09/30/95 and delete the "I" in the duration field with an asterisk (\*).
2. Then end the current distribution. These changes are underlined in the example below.

The screenshot shows the same terminal window as above, but with changes to the appointment and distribution lines:

```

TN3270 - uccmvsv to host uccmvsv.ucop.edu
...
Appt Actions Pgm Typ Bas Pd Ovr Appt Begin Appt End Dur Dept
10 P 2 - - - 080194 999999 I
Title Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv
4354 STUDENT AFFAIRS OFFICER I 1 1.00 E 29200.00 A MO I A
Dist Actions L Acct CC Fund PC S FTE Dis %
11 Z 766033 70800 1 ACCT DESCRIP UNAVAIL 1.00 1.0000
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
080194 999999 - - 2433.33 REG - - -
Dist Actions L Acct CC Fund PC S FTE Dis %
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
Next Func: ID: Name: SSN:
===>
F: 1-Help 3-PrevMenu 4-Print 5-Update
F: 9-Jump 12-Exit
IBM-3278-2-E 11:31:01
    
```

3. Next, add the new appointment for the Student Affairs Officer II, effective 10/01/95 and reinstate the "I" in the duration field. Action Code 38 has been added with the new appointment to reflect an upward reclass.
4. Next, add a corresponding distribution to begin 10/01/95. These steps are illustrated below:

The screenshot shows the terminal window after processing the reclassification:

```

TN3270 - uccmvsv to host uccmvsv.ucop.edu
Session Edit Commands Settings Help
PPEAPP0-E1093 SCT EDB Entry/Update 07/08/97 07:47:50
11/19/96 22:35:18 Appointments/Distributions Userid: SCPPSLAH
ID: 010000994 Name: RECLASS, RETRO T Pri Pay: MO
PAF Gen No: 2 Pg 02 of 02
Appt Actions Pgm Typ Bas Pd Ovr Appt Begin Appt End Dur Dept
20 38 - 2 - - 100195 999999 I
Title Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv
4353 STUDENT AFFAIRS OFFICER II 2 1.00 E 2716.67 A MO I A
Dist Actions L Acct CC Fund PC S HR/SHR General FTE Dis %
21 Z 660700 19900 1 HR/SHR General 1.00 1.0000
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
100195 999999 - - 2716.67 REG - - -
Dist Actions L Acct CC Fund PC S FTE Dis %
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
Next Func: ID: Name: SSN:
U0001 Input accepted
===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 7-Backward 9-Jump
IBM-3278-2-E 07:56:10
    
```

This was an example of the process involved when you want to reflect an accurate stop and start for a specific personnel action. A reclassification is an example of an action that affects both the employee appointment and distribution levels.

### Distribution Level Example

You might use this method to enter a distribution level action, such as a six month increase into the EDB.

For example, you have received the approval to award a six month increase to an employee effective 07/01/95.

1. In this example, the current appointment is not ended, however you would end the current distribution the day before the six month increase is effective.

Session	Edit	Commands	Settings	Help								
PPEAPP0-E0943		SCT EDB Entry/Update		10/13/95 08:38:11								
10/09/95 20:33:16		Appointments/Distributions		Userid: SCPERCLS								
ID: 010000230		Name: CAREER, SIRMOS M		Pri Pay: MO								
PAF Gen No: 2				Pg 01 of 01								
Appt	Actions	Pgm	Typ	Bas	Pd	Ovr	Appt Begin	Appt End	Dur	Dept		
10	5	2					010195	999999	I	002708		
Title			Grade	%Full	F/V	Ann/Hr	Rate	Rt	Sch	Time	Lv	
4724	ASSISTANT I			1.00	F		21552.00	A	NO	I	A	
Dist	Actions	L	Acct	CC	Fund	PC	S			FTE	Dis	*
11		7	724330		66099		1	CATS/SUPPORT CENTER			1.0000	
Pay Begin	Pay End	Step	O/A	Rate/Amount	DOS	PRQ	DOC	WSP				
010195	063095	1.0		1796.00	REG							
Dist	Actions	L	Acct	CC	Fund	PC	S			FTE	Dis	*
12	41	7	723041		66099		1	CATS/SUPPORT CENTER			1.0000	
Pay Begin	Pay End	Step	O/A	Rate/Amount	DOS	PRQ	DOC	WSP				
070195	999999	2.0		1862.00	REG							
Next Func: ID: Name: SSN:												
U0001 Input accepted												
===>												
F: 1-Help 2-Cancel 4-Print 5-Update												
F: 9-Jump												

2. You would then begin a new distribution to start the six month increase effective 07/01/95.

This is shown in the example above on distribution line #12.

The action code 41 has been entered by the preparer to record a six month increase action in relationship to the new distribution line.

## Shortcut Method

Experienced preparers may use the shortcut method for changing an appointment and/or distribution line.

### Step One

End the current appointment or distribution using the following procedure:

1. Move to the *Appointment End date field* and type the **new end date**.
2. If the *Appointment Duration* is Tenured (T) or Indefinite (I) Type an **asterisk (\*)** to delete the current information.
3. Move to the *Distribution End Date field* and type the **new end date**.
4. Repeat for multiple distributions, if applicable.

### Step Two

Copy the existing appointment and/or distribution to a new line:

1. Move to the command line.
2. Use the **"copy xx to yy"** command to copy data from an existing appointment or distribution line to a specified new appointment or distribution line.
3. Press **Enter** to display the new line with the specified appointment or distribution number (all other fields will be identical to the "copied from" appointment or distribution line).

### Step Three

Change the information on the new appointment and/or distribution line, as required.

1. Enter the data to be changed in the required fields on the new appointment or distribution line.
2. Review the begin and end dates of all the affected appointment and distribution lines for continuity.

See *Consistency Edit Messages (ECON)* in [Section 1.6, System Messages](#) for more information and instructions.

### Example of Shortcut Method

You might use the Shortcut Method when recording a sabbatical leave on the EAPP. In this example, you have received approval to record a faculty member's sabbatical in the EDB. The faculty member's current appointment and distribution are shown in the illustration below:

Terminal window: TN3270 - screenshot to host uccmvsb.ucop.edu

```

Session Edit Commands Settings Help
PPEAPP0-E1093      SCT EDB Entry/Update      03/11/97 14:21:08
11/19/96 22:49:04  Appointments/Distributions Userid: SCPAYTJW
ID: 150000900 Name: PROFESSOR, ASSISTANT DEMO Pri Pay: M0
PAF Gen No: 2 Pg 01 of 01
Appt  Actions Pgm Typ Bas Pd Ovr  Appt Begin  Appt End Dur Dept
10      A 5 09 12      070196      063098      001393
Title  Grade %Full F/U Ann/Hr Rate  Rt Sch Time Lv
1300 ASSISTANT PROFESSOR-ACAD YR - 1.00 E 41800.00 A M0 I N

Dist  Actions L Acct CC Fund PC S FTE Dis %
11      2 402780 19900 ASFTE 0 Hum/AM/Staffing - FTE 1.00 1.0000
Pay Begin Pay End Step 0/A Rate/Amount DOS PRQ DUC WSP
070196 063098 3 0 3483.33 REG - - -

Dist  Actions L Acct CC Fund PC S FTE Dis %
Pay Begin Pay End Step 0/A Rate/Amount DOS PRQ DUC WSP
Next Func: ID: Name: SSN:
===>
F: 1-Help 3-PrevMenu 4-Print 5-Update
F: 9-Jump 12-Exit
IBM-3278-2-E 14:28:47
    
```

Next, copy the existing distribution to two new distributions. The new lines are underlined in the illustration below:

Terminal window: TN3270 - screenshot to host uccmvsb.ucop.edu

```

Session Edit Commands Settings Help
PPEAPP0-E1093      SCT EDB Entry/Update      03/12/97 07:40:25
11/19/96 22:49:04  Appointments/Distributions Userid: SCPAYTJW
ID: 150000900 Name: PROFESSOR, ASSISTANT DEMO Pri Pay: M0
PAF Gen No: 2 Pg 01 of 02
Appt  Actions Pgm Typ Bas Pd Ovr  Appt Begin  Appt End Dur Dept
10      A 5 09 12      070196      063098      001393
Title  Grade %Full F/U Ann/Hr Rate  Rt Sch Time Lv
1300 ASSISTANT PROFESSOR-ACAD YR - 1.00 E 41800.00 A M0 I N

Dist  Actions L Acct CC Fund PC S FTE Dis %
11      2 402780 19900 ASFTE 0 Hum/AM/Staffing - FTE 1.00 1.0000
Pay Begin Pay End Step 0/A Rate/Amount DOS PRQ DUC WSP
070196 063098 3 0 3483.33 REG - - -

Dist  Actions L Acct CC Fund PC S FTE Dis %
12      2 402780 19900 ASFTE 0 Hum/AM/Staffing - FTE 1.00 1.0000
Pay Begin Pay End Step 0/A Rate/Amount DOS PRQ DUC WSP
070196 063098 3 0 3483.33 REG - - -

Next Func: ID: Name: SSN:
U0001 Input accepted
===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 8-Forward 9-Jump
IBM-3278-2-E 07:43:35
    
```

Terminal window: TN3270 - screenshot to host uccmvsb.ucop.edu

```

Session Edit Commands Settings Help
PPEAPP0-E1093      SCT EDB Entry/Update      03/12/97 07:42:44
11/19/96 22:49:04  Appointments/Distributions Userid: SCPAYTJW
ID: 150000900 Name: PROFESSOR, ASSISTANT DEMO Pri Pay: M0
PAF Gen No: 2 Pg 02 of 02
Appt  Actions Pgm Typ Bas Pd Ovr  Appt Begin  Appt End Dur Dept
10      A 5 09 12      070196      063098      001393
Title  Grade %Full F/U Ann/Hr Rate  Rt Sch Time Lv
1300 ASSISTANT PROFESSOR-ACAD YR - 1.00 E 41800.00 A M0 I N

Dist  Actions L Acct CC Fund PC S FTE Dis %
13      2 402780 19900 ASFTE 0 Hum/AM/Staffing - FTE 1.00 1.0000
Pay Begin Pay End Step 0/A Rate/Amount DOS PRQ DUC WSP
070196 063098 3 0 3483.33 REG - - -

Dist  Actions L Acct CC Fund PC S FTE Dis %
Pay Begin Pay End Step 0/A Rate/Amount DOS PRQ DUC WSP
Next Func: ID: Name: SSN:
U0001 Input accepted
===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 7-Backward 9-Jump
IBM-3278-2-E 07:45:45
    
```

PPS OVERVIEW

1. Change existing distribution end date.
2. Update the new distributions with the appropriate information. Distribution 12 will become the sabbatical line, so you change the begin and end dates to coincide with the pay period of the leave, and you change the DOS code to "SLN". Distribution 13 will reflect the faculty member's return to regular pay so change the begin date to coincide with the leave return date.

These changes are underlined on the following illustrations:

TN3270 - screenshot to host uccmvsb.ucop.edu														
Session		Edit	Commands		Settings	Help								
PPEAPP0-E1093	SCT EDB Entry/Update				03/12/97 07:55:55									
11/19/96 22:49:04	Appointments/Distributions				Userid: SCPAYTJW									
ID: 150000900	Name: PROFESSOR, ASSISTANT DEMO				Pri Pay: M0									
PAF Gen No: 2		Pg 01 of 02												
Appt	Actions	Pgm	Type	Bas	Pd	Ovr	Appt	Begin	Appt	End	Dur	Dept		
10		A	S	09	12		070196	063098			001393			
Title			Grade	%Full	F/U	Ann/Hr	Rate	Rt	Sch	Time	Lv			
1300	ASSISTANT PROFESSOR-ACAD YR			1.00	F	41800.00		A	M0	I	N			
Dist	Actions	L	Acct	CC	Fund	PC	S	Hum/AM/Staffing				FTE	Dis %	
11	7	402780	19900	ASFTE	0							1.00	1.0000	
	Pay Begin	Pay End	Step	O/A	Rate/Amount	DOS	PRQ	DUC	WSP					
	070196	022897	3	0	3483.33	REG								
Dist	Actions	L	Acct	CC	Fund	PC	S	Hum/AM/Staffing				FTE	Dis %	
12	7	402780	19900	ASFTE	0							1.00	0.6700	
	Pay Begin	Pay End	Step	O/A	Rate/Amount	DOS	PRQ	DUC	WSP					
	030197	063097	3	0	3483.33	SLN								
Next Func: ID: Name: SSN:														
U0001 Input accepted														
===>														
F:	1-Help	2-Cancel	4-Print	5-Update										
F:	7-Backward	8-Forward	9-Jump											
IBM-3278-2-E 07:58:57														

TN3270 - screenshot to host uccmvsb.ucop.edu														
Session		Edit	Commands		Settings	Help								
PPEAPP0-E1093	SCT EDB Entry/Update				03/12/97 07:57:12									
11/19/96 22:49:04	Appointments/Distributions				Userid: SCPAYTJW									
ID: 150000900	Name: PROFESSOR, ASSISTANT DEMO				Pri Pay: M0									
PAF Gen No: 2		Pg 02 of 02												
Appt	Actions	Pgm	Type	Bas	Pd	Ovr	Appt	Begin	Appt	End	Dur	Dept		
10		A	S	09	12		070196	063098			001393			
Title			Grade	%Full	F/U	Ann/Hr	Rate	Rt	Sch	Time	Lv			
1300	ASSISTANT PROFESSOR-ACAD YR			1.00	F	41800.00		A	M0	I	N			
Dist	Actions	L	Acct	CC	Fund	PC	S	Hum/AM/Staffing				FTE	Dis %	
13	7	402780	19900	ASFTE	0							1.00	1.0000	
	Pay Begin	Pay End	Step	O/A	Rate/Amount	DOS	PRQ	DUC	WSP					
	070197	063098	3	0	3483.33	REG								
Dist	Actions	L	Acct	CC	Fund	PC	S	Hum/AM/Staffing				FTE	Dis %	
	Pay Begin	Pay End	Step	O/A	Rate/Amount	DOS	PRQ	DUC	WSP					
Next Func: ID: Name: SSN:														
U0001 Input accepted														
===>														
F:	1-Help	2-Cancel	4-Print	5-Update										
F:	7-Backward	9-Jump												
IBM-3278-2-E 08:00:12														

## Retroactive Actions

You should follow different procedures for entering retroactive actions into the EDB depending on whether each action is retroactive to the begin date of the appointment or distribution, retroactive to a date after the begin date of current appointment or distribution, or retroactive to a date before the begin date of current appointment or distribution.

If you are entering a personnel action with a retroactive effective date, be aware that retroactive pay adjustments may be required. Follow the usual procedures to ensure accurate payment.

## On the Begin Date

If a retroactive change is effective on the same day as the begin date of an existing appointment or distribution *AND* is an error correction, then and only then, you may change the information on the existing line.

However, if the retroactive action is a change to the terms and conditions of employment, a new appointment must be established. The existing appointment(s)/distribution(s) should be ended appropriately. Contact a central office for guidance.

## After the Begin Date

If a retroactive change is effective on a day after the begin date of an existing appointment or distribution, end the current appointment and/or distribution and set up a new one.

## Before the Begin Date

If a retroactive change is effective on a day before the begin date of an existing appointment or distribution, and the previous line has been purged off of the database during monthly maintenance, add a new appointment and/or distribution with the correct information.