

2.1 APPOINTMENT CODING

USE THIS CHAPTER IN CONJUNCTION WITH [SECTION 1.11 – APPOINTMENTS AND DISTRIBUTIONS \(GENERAL INFORMATION\)](#) TO DETERMINE PROPER APPOINTMENT CODING.

Overview

Appointments are established to define the terms and conditions of employment with the University and should be reflective of the effort (percentage of time) that is required to perform the duties on a regular basis. For example, the appointment records the nature of the appointment (fixed or variable), beginning and ending dates of the appointment, the department the appointment is in, the personnel program and job title, and whether the appointment is career, limited, contract, casual/restricted, academic or by-agreement.

Distributions are established to define how the employee is paid. For example, distributions record information about the pay rate the employee will receive, the account number the pay will be charged to, and what type of pay it is, e.g. regular pay, shift differential, or a stipend, etc.

The following appointment/distribution codes are essential to the proper classification of the employee, as well as ensuring that time and attendance data is accurately reported to the compute process. It is the coding of the F/V (fixed/variable) code, Rate code, Pay Schedule, and Time code on the appointment line that determines if the employee's time is to be prelisted on the Rosters, which pay cycle the employee is to be paid on, and if the employee is to be set up as positive time reporting or exception time reporting.

Fixed/Variable

F = Appointment is fixed. Roster will pre-list time for the employee. (**note: time code must = R**)

V = Appointment is variable. Roster will not pre-list time for the employee. (**note: time code must = Z**)

or

V = Appointment is variable and employee is a student title paid via the CruzPay application. (**note: time code must = C**)

Rate Code

A = (Annual) Employee has a monthly rate of pay (expressed as an annual rate of pay on the appointment line)

H = (Hourly) Employee has an hourly rate of pay

B = (By-Agreement) Employee's appointment is By-Agreement and paid a fixed dollar amount that is not associated with a percent time or number of hours worked

The Rate code also defines the format the system will use for the distribution pay rate field.

- If the Rate code is A or B, the distribution pay rate will be formatted as a monthly figure, with two significant digits after the decimal point. (XXXX.XX)
- If the Rate code is H, the distribution pay rate will be formatted as an hourly figure, with four significant digits after the decimal point. (XX.XXXX)

Pay Schedule

MO = Employee's appointment has a monthly rate of pay.

BW = Employee's appointment has an hourly rate of pay.

An individual employee must have only ONE pay schedule for all appointments

By-Agreement type appointments may be set up on either the MO or the BW

Time Code

R = Exception time reporting. Used to generate pay for all appointments that are set up as Fixed (F) and paid by on-line Roster in OPTRS.

Z = Positive time reporting. Used to generate pay for all appointments set up as Variable (V) and paid by on-line Rosters in OPTRS.

C = Positive time reporting. Used to generate pay for all appointments set up as Variable (V), and paid via CruzPay.

W = No pay expected. Used for all appointments set up without salary.

N = Positive time reporting, no pay expected or will be generated via on-line Rosters in OPTRS.

Time reporting codes must be used in a consistent manner for the entire campus. The above are the only currently valid codes for the Santa Cruz campus.

Sub Code

0 = Academic Salary Roll

- must be **Fixed** and Time Code **R**

1 = Staff Salary Roll

- must be **Fixed** and Time Code **R**

2 = General Assistance

- If **Fixed** must be Time Code **R**
- If **Variable** must be Time Code **Z** or **C**
- FTE is never coded on sub 2 appointments

Application of Codes:

Designates Appointment Level Code
Designates Distribution Level Code

Fixed appointments (regardless of sub code) must be set up as exception time reporting (Time Code R). Fixed appointments can be monthly rated, hourly rated, or by-agreement. Fixed appointments are used for employees who will work a predetermined, set schedule of time each pay-cycle.

CLASSIFICATION OF PAY	FIXED/VARIABLE CODE	RATE CODE	PAY SCHEDULE	TIME CODE	RATE	SUB CODE
Rated pay E.g. REG, SDF, etc.	F	A	MO	R	XXXX.XX	0,1,2
Rated pay E.g. REG, SDF, etc.	F	H	BW	R	XX.XXXX	0,1,2
Flat Rated E.g. BYA, UNX, SAS, STP, PRQ etc.	F	B	MO	R	XXXX.XX	0,1,2
Flat Rated E.g. BYA, UNX, SAS, STP, PRQ etc.	F	B	BW	R	XXXX.XX	0,1,2
Without Salary E.g. WOS, PDW	F	Leave blank	Leave blank	W	Leave blank	0,1,2

Variable appointments must be set up as positive time reporting (Time Code Z or C). Variable appointments are hourly rated or by-agreement, and must be sub 2. Variable appointments are used for employees who do not work a predetermined, set schedule of time each pay-cycle.

CLASSIFICATION OF PAY	FIXED/VARIABLE CODE	RATE CODE	PAY SCHEDULE	TIME CODE	RATE	SUB CODE
Rated pay	V	H	BW	Z	XX.XXXX	2

PAYROLL

E.g. REG, SDF, etc.						
CruzPay Students Rated pay E.g. REG	V	H	BW	C	XX.XXXX	2
Flat Rated E.g. BYA, UNX SAS, STP, PRQ etc.	V	B	BW	Z	XXXX.XX	2
Without Salary E.g. WOS, PDW	V	Leave blank	Leave blank	W	Leave blank	2

Please refer to the appropriate Staff or Academic policy, and/or your Staff or Academic HR analyst for further clarification or guidance in regards to the above scenarios.

When entering additional employment, check to see if the employee’s existing pay cycle matches the default pay cycle for the appointment you are entering. If there is a pay cycle conflict, contact the Academic Personnel Office if academic employment is involved; otherwise, contact Employee & Labor Relations.

Once the primary appointment has been determined, all appointments for the employee must be set up on the default pay cycle associated with the primary appointment. As a result, an appointment may need to be converted to a different pay schedule.