

2.4 STAFFING LIST, TIMEFILE, AND TEMPORARY CHANGE IN PERCENT TIME

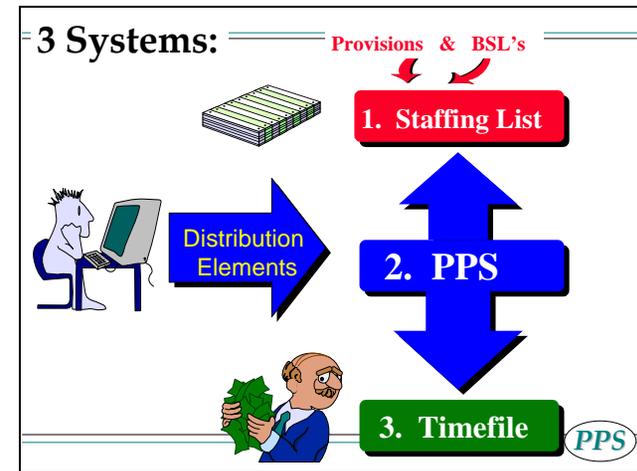
Quick Reference Locator for Temporary Actions

- Temporary Change in Percent Time page 6 and Sec. 6.9
- Temporary Appt “Replacing” Base Appt.. page 13
- Temporary Acct Number Change See OPTRS Manual
- Temporary Reclassification/Promotion..... See Sec. 6.12

Background

Sub 0 and sub 1 employees have budgeted (hard \$) positions. This is represented on the distribution line as **FTE** (*full time equivalent*). There are some sub 0 employees who, properly, do not have FTE, (Teaching Assistants, Lecturers, Graduate Student Researchers - generally titles in the range of 2XXX - 3XXX, and 16XX), and **some** sub 1 employees, *in certain situations*¹, do not have FTE associated with a particular distribution.

For employees appointed in a career position, Three Systems interact to manage the permanent budget and pay the employee²:



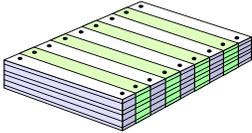
¹ In certain instances, there is no FTE established for an appointment that fits the criteria. When a department is self-funded, they are not budgeted as other fund sources, and thus, do not have FTE established (so do not print on the Staffing List).

² Other sub systems also interface with PPS, but are not pertinent to this module

1) The Staffing List

Staffing List

- ◆ Report of career, budgeted employees (FTE)
- ◆ Resource document to units
- ◆ Tool for managing the permanent budget





The Staffing List is composed of three processes:

- PPS – Payroll/Personnel System Distribution elements
- BSL – journal prepared for permanent changes to the budget
- Provision – tracking filled and unfilled positions

BSL's and Provisions are not a part of OEU and are managed by the Budget Office and Service Center personnel who deal with budget issues. The preparer should be aware that what is entered in the PPS system through the distribution elements (FTE) has impact on these other processes.

2) Timefile

Timefile: UPAY644E

- ◆ Worksheet that determines what employee will be paid
- ◆ Reflects current appointment time & payment info. residing in PPS at the time the worksheets were drawn from
- ◆ Lists all employees eligible for payment within specified pay period by FAU





3) Data is input into the PPS system via Distribution Elements. The Staffing List gets the FTE from these distribution elements. The Timefile pulls the distribution %.

FTE = Full Time Equivalent (budget)

- ◆ subs 0 and 1 *only*
- ◆ For each distribution, amount in the FTE field represent the percentage of budget position
- ◆ “Full” FTE (or 100% FTE) is shown as 1.00
- ◆ Total of FTE within specified dates cannot be greater than 1.00
- ◆ FTE coded on a distribution will include that employee on the **Staffing List**
- ◆ FTE does *not* feed the Timefile



Distribution %

- ◆ Required in all distributions regardless of sub (0,1,2) *except for flat rated distributions (i.e., BYA)*
- ◆ Required for both fixed & variable appointments
- ◆ Represents the % of salary to be charged to the FAU on the distribution
- ◆ “Full Time” (or 100%) is shown as 1.0000 on the dist.
- ◆ Total of all REG distributions may not exceed 100%
- ◆ Drives employee’s gross pay
- ◆ Does *not* feed to the Staffing List



The distribution line contains important data elements for both the budget process and the payment of employees.

Here is the distribution line as it appears on IAPP (**note: the associated appointment is not shown on the following examples**)

Distribution Elements in PPS

Dis: 11 L/A/C/E/P/S 7 761340 70490 1 CR/MERR II/HSG/
 Begin: 06/05/97 Dis %: 1.0000 Rate/Amt : 1500.00 Step/OA: DOS:REG
 End : 99/99/99 FTE : 1.00 Dept Cd: 003565 PRQ: DUC: WSP:



This example represents a typical career employee.

The Staffing List pulls data elements from the distribution line to affect PERMANENT BUDGET:

*Distribution Elements
Relating to Staffing*

staffing list

FTE & Rate

Dis: 11 L/A/C/E/P/S 7761340 70490 1 CR/MERR II/HSG/
 Begin: 06/05/97 Dis %: 1.0000 Rate/Amt : 1500.00 Step/OA: DOS:REG
 End : 99/9999 FTE : 1.00 Dept Cd: 003565 PRQ: DUC: WSP:

PPS

The Timefile pulls data elements from the same distribution line to affect employee pay:

*Distribution Elements
Relating to Staffing*

timefile

Dis %: 1.0000 & Rate

Dis: 11 L/A/C/E/P/S 7761340 70490 1 CR/MERR II/HSG/
 Begin: 06/05/97 Dis %: 1.0000 Rate/Amt : 1500.00 Step/OA: DOS:REG
 End : 99/99/99 FTE : 1.00 Dept Cd: 003565 PRQ: DUC: WSP:

PPS

Thus, the two systems derive their data from the same distribution line on PPS, but as is illustrated below, the Staffing List and the Timefile update independently of each other.

*Distribution Elements
Related to Staffing*

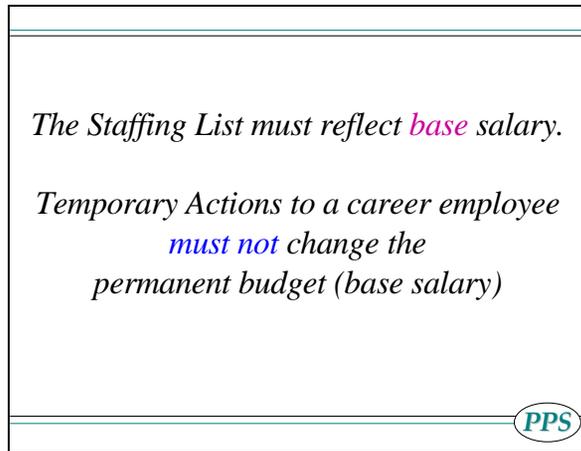
staffing list **timefile**

FTE & Rate **Dis %: 1.0000 & Rate**

Dis: 11 L/A/C/E/P/S 7761340 70490 1 CR/MERR II/HSG/
 Begin: 06/05/97 Dis %: 1.0000 Rate/Amt : 1500.00 Step/OA: DOS:REG
 End : 99/99/99 FTE : 1.00 Dept Cd: 003565 PRQ: DUC: WSP:

PPS

Temporary Actions:



Overview

The procedures described below relate to processing TEMPORARY actions to a career employee that do not affect the permanent budget. These actions are:

- Temporary Change in Percent of Time and
- Temporary Appointment Replacing Base Appointment.

Policy Summary

Refer to Policy Summaries in this manual (Staff and Academic) for Change in Percent of Time. The same considerations given permanent actions must also be addressed when processing actions of a temporary nature, however there are additional budgetary issues for **temporary actions** on which this section will focus.

Before You Start

Obtain required approval to complete the temporary action.

Data Collection Documents (DCD's):

- For an ACADEMIC change use either the employee letter or the markup listing.
- For both Staff and Academic change in percent time, use the PCNT data collection document.

Data Entry

Use the **STEM** bundle to process these temporary actions

EAPP (Appointments/Distributions)

EPER (Personnel-Miscellaneous)

Accessing the STEM Bundle

1. Log on to the Payroll/Personnel System
2. At Next Function, type **EEDB** and press **Enter**
3. Type **BUND** and press **Enter** to display *the bundle menu*
4. Type **STEM, Employee ID Number** and press **Enter**

The EAPP function is displayed for the selected employee

Temporary Change in Percent Time

This scenario illustrates a **temporary** percent time **reduction**.

- ◆ Penny is a Clerk in a Career position with:
 - 100% time
 - 1.00 FTE
- ◆ She accepts a 25% temporary position as a ____ Asst II.
- ◆ The Clerk position is temporarily reduced to 75% for the duration of the temporary ____ Asst II. appointment





This distribution (12) reflects the employee's **BASE**, or **CAREER** position, which is *the position for which she is budgeted*. When an employee temporarily **changes** the percentage of time on their career position, the affected distribution is **STILL ACTIVE** under that career position

*Temporary % Reduction
(Career Position)*

staffing list

1.00 FTE & Rate

timefile

Dis %: 0.7500 & Rate

Dis: 12 L/A/C/L/PP/S 7761340 70490 1 CR/ME/ASST II/HES/

Begin: 06/05/97 Dis %: 0.7500 Rate/ Amt : 1500.00 Step/OA:DOS:REG

End : 8/31/97 FTE : 1.00 Dept Cd: 003565 PRQ: DUC: WSP



Note the distribution % has been **REDUCED** to .7500 on her **career, or BASE** position. This action *will impact the Timefile*.

Note the **FTE has NOT CHANGED**. This action *will NOT impact the Staffing List*.

Distribution 12 is accomplishing two things:

1. Reducing the % time she will be paid from this distribution (on the Timefile), and
2. Holding the place of the FTE (on the Staffing List) so as NOT TO AFFECT the permanent budget

For this scenario, a new appointment and distribution will also have to be set up to pay the employee for the temporary assignment she has accepted.

Temporary ___ Asst II position

timefile

Dis %: 0.2500 & Rate

Dis: 21 L/A/C/F/P/S 7761340 70490 2 CR/MPER II/H/G/

Begin: 06/05/97 Dis %: 0.2500 Rate/Amt : 1900.00 Step/OA:DOS:REG

End : 8/31/97 FTE : 0.00 Dept Cd: 003565 PRQ: DUC: WSP:

PPS

(Note the distribution number is 21, which indicates a NEW APPOINTMENT has been set up.)

Distribution 21 is accomplishing one thing:

1. Paying the employee for the temporary assignment (on the Timefile)

Note that FTE is 0.00, thus the Staffing List is NOT IMPACTED

FTE must ALWAYS be 0.00 on distributions associated with TEMPORARY APPOINTMENTS. A temporary appointment must NOT be included in the PERMANENT BUDGET.

Once the temporary action is over, the employee must be brought back to their regular career status.

*After Temporary % Reduction
(Career Position)*

staffing list **timefile**

1.00 FTE & Rate Dis %: 1.0000 & Rate

Dis: 13 L/A/C/F/P/S 7761340 70490 1 CR/MPER II/H/G/

Begin: 09/01/97 Dis %: 1.0000 Rate/Amt : 1500.00 Step/OA:DOS:REG

End : 99/99/99 FTE : 1.00 Dept Cd: 003565 PRQ: DUC: WSP:

PPS

Completing the EAPP Function

(Use the STEM bundle for data entry)

THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION, PAGE 1 BASE APPOINTMENT

ucmvsb.ucop.edu - TN3270/TN5250 Connection

Session Edit View Commands Script Help

PPEAPP0-E1419 SCT EDB Entry/Update STEM 06/19/03 08:11:22
 06/16/03 12:16:22 Appointments/Distributions Userid: SCTRNG1
 ID: 010000190 Name: PAN, PENNY P Pri Pay: M0
 PAF Gen No: 2 Pg 01 of 03

Appt	Actions	Pgm	Typ	Bas	Pd	Ovr	Appt Begin	Appt End	Dur	Dept	FLSA
10			1	2			080395	999999	I	002138	0

Title 4673 CLERK Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv
 1.00 F 18000.00 H M0 I H

Dist	Actions	L	Acct	CC	Fund	PC	S	FTE	Dis %
11		7	444645	19900	1	UCO/LICK/OBSERVATORY-FE	1.00	1.0000	
	Pay Begin	Pay End	Step	O/A	Rate/Amount	DOS	PRQ	DUC	WSP
	080395	060497	1.0		1500.00	REG			

Next Func: ID: Name: SSN:

====>

F: 1-Help 3-PrevMenu 4-Print 5-Update
 8-Forward 9-Jump 11-NextFunc 12-Exit

THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION, PAGE 2 BASE APPOINTMENT

ucmvsb.ucop.edu - TN3270/TN5250 Connection

Session Edit View Commands Script Help

PPEAPP0-E1419 SCT EDB Entry/Update STEM 06/19/03 08:12:43
 06/16/03 12:16:22 Appointments/Distributions Userid: SCTRNG1
 ID: 010000190 Name: PAN, PENNY P Pri Pay: M0
 PAF Gen No: 2 Pg 02 of 03

Appt	Actions	Pgm	Typ	Bas	Pd	Ovr	Appt Begin	Appt End	Dur	Dept	FLSA
10			1	2			080395	999999	I	002138	0

Title 4673 CLERK Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv
 1.00 F 18000.00 H M0 I H

Dist	Actions	L	Acct	CC	Fund	PC	S	FTE	Dis %
13		7	444645	19900	1	UCO/LICK/OBSERVATORY-FE	1.00	1.0000	
	Pay Begin	Pay End	Step	O/A	Rate/Amount	DOS	PRQ	DUC	WSP
	090197	999999	1.0		1500.00	REG			

Next Func: ID: Name: SSN:

====>

F: 1-Help 3-PrevMenu 4-Print 5-Update
 7-Backward 8-Forward 9-Jump 11-NextFunc 12-Exit

THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION, PAGE 3 TEMPORARY APPOINTMENT

ucmvsb.ucop.edu - TN3270/TN5250 Connection

Session Edit View Commands Script Help

PPEAPP0-E1419 SCT EDB Entry/Update STEM 06/19/03 08:12:29
 06/16/03 12:16:22 Appointments/Distributions Userid: SCTRNG1
 ID: 010000190 Name: PAN, PENNY P Pri Pay: M0
 PAF Gen No: 2 Pg 03 of 03

Appt	Actions	Pgm	Typ	Bas	Pd	Ovr	Appt Begin	Appt End	Dur	Dept	FLSA
20			1	2			060597	083197	0	002138	0

Title 4723 ASSISTANT II Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv
 0.25 F 1900.00 H M0 I H

Dist	Actions	L	Acct	CC	Fund	PC	S	FTE	Dis %
21		7	444645	19900	2	UCO/LICK/OBSERVATORY-FE	0.2500		
	Pay Begin	Pay End	Step	O/A	Rate/Amount	DOS	PRQ	DUC	WSP
	060597	083197	1.0		1900.00	REG			

Next Func: ID: Name: SSN:

====>

F: 1-Help 3-PrevMenu 4-Print 5-Update
 7-Backward 9-Jump 11-NextFunc 12-Exit

BASE (CAREER) POSITION:

Using the end/begin method:

- End the sub 1 or sub 0 (base) distribution the day before the temporary change in percent time is to start (06/04/97 in this example).
- Add the distribution to temporarily reduce the % in time (must be the same FAU, so it remains under base appointment).
- Add a distribution to bring employee back to regular status.

Distribution Level Procedure

1. End the current distribution effective the day before the temporary action will begin.
2. **F9 Jump** to the command line and set up the next available distribution using the “**copy xx to xx**” command (in this example, copy 11 to 12).
3. Enter data in the following fields, as applicable:

Actions (Action Code)	Leave Blank. Personnel action code for change in percent of time is system derived.
L	Enter 7 for UCSC location number.
Acct	Enter ‘organization’ FOAPAL number.
CC	Enter cost center.
Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 0, 1 or 2 as applicable.
FTE	Do not change the percentage of the budgeted position which the distribution represents. Full time FTE (100%) is entered as 1.00.

%Dist	Enter the anticipated time which is chargeable to the distribution accounting unit 75% is entered as .7500.
Pay Beg	Enter the date the temp. change in percent of time begins in the format: MMDDYY.
Pay End	Enter the date the temp. change in percent of time will end in the format: MMDDYY.
Step	If employee is appointed to a step-based title code, then enter the appropriate step within the salary range associated with the title code. Enter steps in the following format for staff: 1.0, 1.5, 2.0, 2.5, 3.0, 3.5, 4.0, 4.5, 5.0 Enter steps in the following format for academics: 1, 2, 3, 4, 5
O/A	As applicable for academic appointments. Leave blank for staff.
Rate/ Amount	Enter the monthly, hourly, or by-agreement rate reflecting the salary for this action.
DOS	Enter REG for regular pay.
PRQ	Leave Blank.
DUC	Leave Blank.
WSP	Leave Blank.

4. Press **Enter** to invoke range/value edits.

Note: Since this is a temporary action, the employee will need a distribution to return them to their original percent of time.

5. **F9 Jump** to the command line and set up the next available distribution using the “**copy xx to xx**” command (in this example, copy 11 to 13).
6. Enter data in the following fields, as applicable.

PAYROLL

Actions (Action Code)	Leave Blank. Personnel Action Code for change in percent of time is system derived.
L	Enter 7 for UCSC location number.
Acct	Enter 'organization' FOAPAL number.
CC	Enter cost center.
Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 0, 1 or 2 as applicable.
FTE	Enter the percentage of the budgeted position which the distribution represents, if applicable. Full time FTE is entered as 1.00.
% Full	Enter the anticipated time which is chargeable to the distribution accounting unit. 100% is entered as 1.0000.
Pay Beg	Enter the date the employee will return to their original percent of time in the format: MMDDYY.
Pay End	Enter the original ending date of the employee distribution pay end. If indefinite, enter 999999.
Step	If employee is appointed to a step-based title code, then enter the appropriate step within the salary range associated with the title code. Enter steps in the following format for staff: 1.0, 1.5, 2.0, 2.5, 3.0, 3.5, 4.0, 4.5, 5.0 Enter steps in the following format for academics: 1, 2, 3, 4, 5
O/A	As applicable for academic appointments. Leave blank for staff.

Rate/ Amount	Enter the monthly or hourly rate reflecting the salary for this action. If hourly, remember to use four decimal places, i.e., \$10.00/hour is entered as 10.0000. If monthly, i.e., \$2014.00 enter as 2014.00.
DOS	Enter REG for regular pay.
PRQ	Leave Blank.
DUC	Leave Blank.
WSP	Leave Blank.

7. Press **Enter** to invoke range/value edits.

TEMPORARY APPOINTMENT:

- Add a new appointment and distribution, generally with sub 2, for the period of 06/05/97 - 08/31/97.
- Remember, sub 2 distributions must ALWAYS be under separate appointments from sub 1 or sub 0 distributions. (See [Section 2.1-1.](#))

Appointment Level Procedure

1. **F9 Jump** to the command line and set up the next available appointment using the “**add a**” command.
2. Enter data in the following fields, as applicable:

Actions (Action Code)	Leave Blank. Personnel Action Code for change in percent of time is system derived.
PGM	Leave Blank. System derived.
Typ	Enter the code indicating the appointment type associated with the appointment.
Bas	For partial-year staff employees, enter the code that indicates the number of months in the year that the employee will work. For temporary academic appointments, enter the appropriate basis code.
Pd Ovr	For temporary academic appointments, enter the appropriate Paid Over Code. Leave blank for staff.
Appt Begin	Enter the date on which the change is effective in the format: MMDDYY.
Appt End	Enter end date of the temporary appointment in the format: MMDDYY.
Dur	Leave blank.

Title	Enter the title code.
Grade	Enter if appropriate
% Full	Enter the percentage of time for the temporary appointment (i.e. 25%) that the employee is expected to work in the temporary appointment. 25% is entered as .25.
F/V	Enter the appropriate code to indicate whether the percentage of time the employee will work in the appointment is: Fixed (F) or Variable (V).
RT	Enter the code that indicates whether the rate of pay is: Annual (A), Hourly (H), or By Agreement (B).
Annual	Leave Blank. System derived.
Sch	Enter Monthly Current (MO)
Time	Enter the time code that represents the method of reporting time for the appointment. Enter (T) for Exception Time Reporting or Enter (A) for Positive time reporting.
LV	Enter the leave accrual code that indicates the rate at which vacation and sick leave will be accrued.

3. Press **Enter** to invoke range/value edits.

Distribution Level Procedure

1. **F9 Jump** to the command line and use the “**copy xx to xx**” command to set up the next available distribution (in this example, copy 11 to 21).
2. Enter data in the following fields as applicable.

Actions (Action Code)	Leave Blank. Personnel Action Code for Change in Percent of time is system derived.
L	Enter 7 for UCSC location number.
Acct	Enter ‘organization’ FOAPAL number.
CC	Enter cost center.
Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 0, 1 or 2 as applicable.
FTE	Leave blank. (This field must be blank on temporary appointment)
Dist %	Enter the anticipated time which is chargeable to the distribution accounting unit. 25% is entered as .2500.
Pay Beg	Enter the date on which the salary begins as a result of the change in percent of time in the format: MMDDYY.
Pay End	Enter the date on which the pay for the temporary appointment is expected to end due to account/fund activity in the format: MMDDYY.

Step	If employee is appointed to a step-based title code, then enter the appropriate step within the salary range associated with the title code. Enter steps in the following format for staff: 1.0, 1.5, 2.0, 2.5, 3.0, 3.5, 4.0, 4.5, 5.0 Enter steps in the following format for academics: 1, 2, 3, 4, 5
O/A	As applicable for academic appointments. Leave blank for staff.
Rate/ Amount	Enter the monthly, hourly, or by-agreement rate reflecting the salary for this action
DOS	Enter REG for regular pay.
PRQ	Leave Blank.
DUC	Leave Blank.
WSP	Leave Blank.

3. Press **Enter** to invoke range/value edits.
4. Press **F11 Next Func** to continue to the next function.

The **EPER** (Personnel Miscellaneous) function will be displayed for the employee.

See [Section 6.9-5 – 6.9-6](#) for the following procedures:

- EPER
- Review
- Consistency Edits
- PAN Preparation
- Accessing IMSG
- Disposition of Forms

Temporary Appointment “Replacing” Base Appointment – STAFF or ACADEMIC

Background:

Staffing List Only (SLO) Distributions

When there is **NO** active distribution to hold the place for FTE, a new DOS code is required:

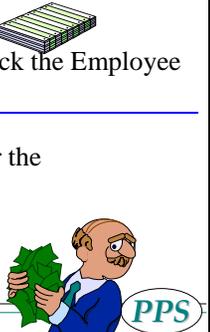
- **SLO** is a description of service that stands for **Staffing List Only**. It is *not* a *paying* DOS code. A distribution established with the DOS code SLO will not generate pay, but will include that employee on the staffing list. The Budget Control Office is responsible for maintaining the staffing list, which is the list that keeps track of the dollars and FTE for each account. Central Offices make SLO entries when necessary to balance the staffing list. Service Centers will also create SLO distributions for the following:
 - Temporary Appointment “Replacing” Base Appointment for an Academic Employee

The SLO distribution basics:

The SLO distribution acts as the placeholder for **BASE (budgeted) salary on the Staffing List**

The SLO distribution and the temporary assignment distribution will always have the same begin and end dates (ie. The staffing list must still reflect BASE SALARY for the duration of the temporary action.)

Setting Up a SLO...	
base appt.	<ol style="list-style-type: none"> 1. End Current Distribution (<i>no change to Appt!</i>) 2. Begin new Distribution <ul style="list-style-type: none"> • placeholder for FTE on the Staffing List • DOS Code = SLO 3. Setup a new Dist. to bring back the Employee to their regular pay status
temp appt.	<ol style="list-style-type: none"> 4. Begin another Appt./Dist for the Temporary Appt <ul style="list-style-type: none"> • no FTE • DOS Code = as applicable



A temporary appointment will ALWAYS require a new appointment because it involves a change in title. If the title code and rate are not changing, this is a funding change. See OPTRS EDTS and EDTM procedures. For a temporary appointment you would:

1. End the current distribution under the base appointment
2. Set up the SLO distribution for the duration of the temporary action
3. Set up a “future” distribution to bring the employee back to regular status once the temporary action is over
4. Set up a new appointment for the duration of the temporary action
5. Set up a new distribution, under the new appointment, for the duration of the temporary action

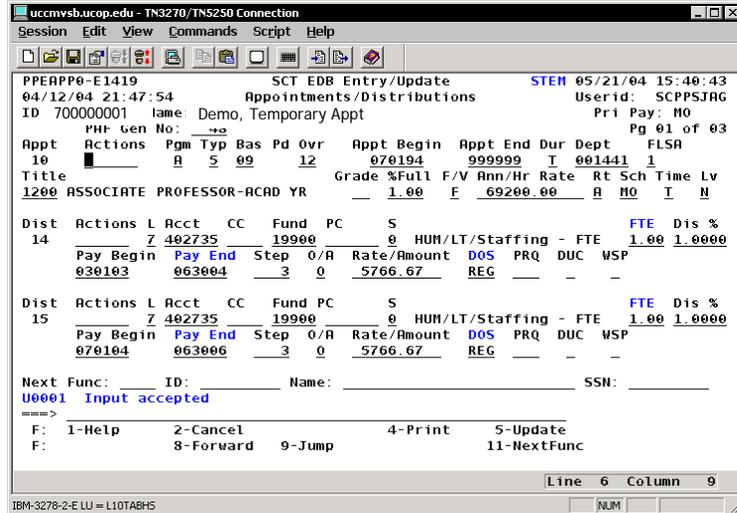
EXAMPLE SCENARIO

An academic employee is receiving a temporary appointment as an Education Abroad Program Director in another country from July 1, 2004 through June 30, 2006. Although this temporary appointment completely replaces her base appointment, and she will not be performing the duties of her base appointment while this temporary appointment is active, the base appointment must still be maintained in PPS for budgetary purposes.

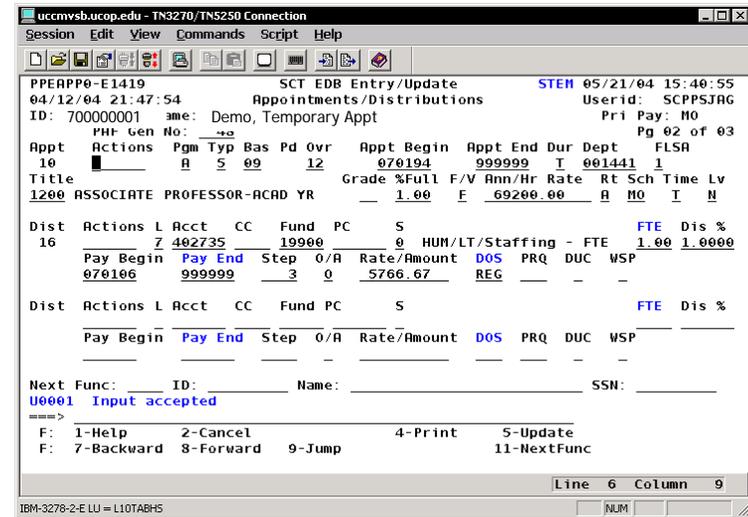
Completing the EAPP Function

(Use the STEM bundle for data entry)

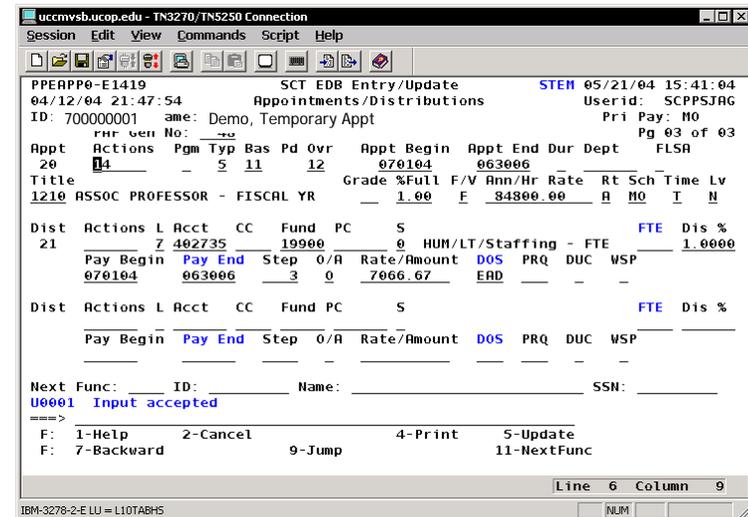
THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION, PAGE 1
BASE APPOINTMENT



THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION, PAGE 2
BASE APPOINTMENT



THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION, PAGE 3
TEMPORARY APPOINTMENT



BASE APPOINTMENT:

Using the end/begin method:

- End the sub 0 or 1 (base) distribution 06/30/04
- Add a new distribution under the sub 0 or sub 1 (base) appointment with the account/fund/sub, FTE % of time, step and rate that the employee is normally budgeted for. The **begin and end date** should match the **begin and end date** of the temporary action (07/01/04 – 06/30/06) and the DOS code will be **SLO**.
- Add a distribution to bring employee back to regular status 07/01/06 - 99/99/99

Distribution Level Procedure

1. End current distribution the date before the temporary appointment is to begin.
2. Enter data for the SLO distribution as follows:

Actions (Action Code)	Leave blank.
L	Enter 7 for UCSC location number.
Acct	Enter 'organization' FOAPAL number.
CC	Enter cost center.
Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 0 or 1 as applicable.
FTE	FTE must be same as FTE in base distribution (1.00 in this example).
Dist%	Enter the anticipated time which is chargeable to the accounting unit resulting from the appointment. 100% is entered as 1.0000.

Pay Beg	Enter the date on which the temporary appointment is effective in the format: MMDDYY.
Pay End	Enter the date on which the temporary appointment is expected to end the format: MMDDYY.
Step	Step must be the same as Step in base distribution (3 in this example). Enter steps in the following format for staff: 1.0, 1.5, 2.0, 2.5, 3.0, 3.5, 4.0, 4.5, 5.0 Enter steps in the following format for academics: 1, 2, 3, 4, 5
O/A	As applicable for academic appointments. Leave blank for staff.
Rate/Amount	The Rate/Amount must be the same as Rate/Amount in base distribution (5766.67 in this example).
DOS	Enter SLO for Staffing List Only. This code indicates the description of service.
PRQ	Leave Blank.
DUC	Leave Blank.
WSP	Leave Blank.

3. **F9 Jump** to the command line and use the “copy xx to xx” command to copy the original distribution(s) to new distribution(s). **Note:** You should copy the original distribution(s) not the temp. distribution(s).
4. Since you used the copy command, usually the only data elements requiring OEU would be the Pay Begin and Pay End dates.

Actions (Action Code)	Leave blank. The action code, if applicable, is entered at the appointment level and will be entered on the temporary appointment.
Pay Begin	Enter the date the employee will return to their original base pay in the format: MMDDYY. Return date is the day after the temp. action has ended.
Pay End	Enter the ending date of the employee's regular distribution and pay.

5. Press **Enter** to invoke range/value edits.

TEMPORARY APPOINTMENT:

- For a temporary appointment, title is ALWAYS changing, so a new appointment is ALWAYS required.
- Add a **new appointment and distribution** for the period of **07/01/04 – 06/30/06**.

Appointment Level Procedure

1. **F9 Jump** to the command line and set up the next available appointment using “**copy xx to xx**” (**appointment 10 to 20 in this example**).
2. Enter data for the temporary appointment as follows:
3. Enter data in the following fields, as applicable:

Actions (Action Code)	Enter the appropriate Personnel Action Code (14 in this example).
PGM	Leave Blank. System derived.
Typ	Enter the code indicating the appointment type associated with the appointment.

Bas	For temporary academic appointments, enter the appropriate basis code.
Pd Ovr	For temporary academic appointments, enter the appropriate Paid Over code. Leave blank for staff.
Appt Begin	Enter the date on which the temporary appointment is effective in the format: MMDDYY.
Appt End	Enter end date of the temporary appointment in the format: MMDDYY.
Dur	Leave blank.
Title	Enter the title code.
Grade	Enter if appropriate.
% Full	Enter the percentage of time for the temporary appointment (100% in this example) that the employee is expected to work. 100% is entered as 1.00.
F/V	Enter the appropriate code to indicate whether the percentage of time the employee will work in the appointment is: Fixed (F) or Variable (V).
RT	Enter the code that indicates whether the rate of pay is: Annual (A), Hourly (H), or By Agreement (B).
Annual	Leave Blank. System derived.
Sch	Enter Monthly Current (MO).
Time	Enter (T) for Exception Time Reporting or Enter (A) for Positive Time Reporting. This code represents the method or reporting time for the appointment.

LV	Enter the leave accrual code that indicates the rate at which vacation and sick leave will be accrued.
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4. Press **Enter** to invoke range/value edits.

Distribution Level Procedure

1. **F9 Jump** to the command line and use the “**add d**” command to add distribution(s) to new temporary appointment.
2. Enter data in the following fields, as applicable:

Actions (Action Code)	Leave blank.
L	Enter 7 for UCSC location number.
Acct	Enter ‘organization’ FOAPAL number.
CC	Enter cost center.
Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 0, 1 or 2 as applicable.
FTE	Leave Blank, there should be no FTE associated with a temporary action.
Dist%	Enter the anticipated time which is chargeable to the accounting unit resulting from the temporary appointment. 100% is entered as 1.0000.
Pay Beg	Enter the date on which the temporary appointment is effective in the format: MMDDYY.

Pay End	Enter the date on which the temporary appointment is expected to end the format: MMDDYY.
Step	If the employee is appointed to a step-based title code, then enter the appropriate step within the salary range associated with the temporary appointment. Enter steps in the following format: 1.0, 1.5, 2.0, 2.5, 3.0, 3.5, 4.0, 4.5, 5.0 Enter steps in the following format for academics: 1, 2, 3, 4, 5
O/A	As applicable for academic appointments. Leave blank for staff.
Rate/Amount	The monthly, hourly or by agreement amount in effect for the temporary appointment.
DOS	Enter the appropriate DOS (description of service) Code (EAD for EAP Director in this example)..
PRQ	Leave Blank.
DUC	Leave Blank.
WSP	Leave Blank.

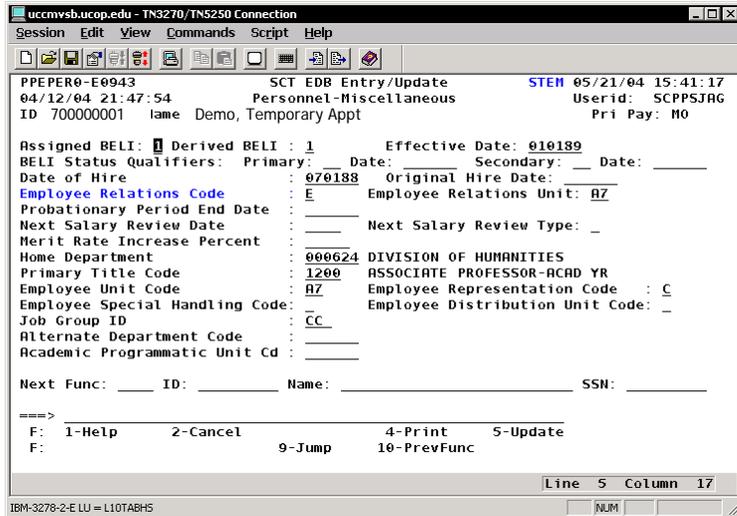
3. Press **Enter** to invoke range/value edits.

4. Press **F11 Next Func** to continue to the next function.

The **EPER** (Personnel Miscellaneous) function will be displayed for the employee.

Completing the EPER Function

EPER (PERSONNEL MISCELLANEOUS) FUNCTION



EPER Notes and Tips

- Did the change action affect any of the highlighted fields?
If not, forward to *Review*. Otherwise, update as appropriate.

The EPER Procedure

1. Press **Enter** to invoke range/value edits.
2. This is the last function in the **STEM** Bundle. Proceed to the *Review* section.

Review

1. Use **F10** or **F11** to navigate through the **STEM** bundle.
2. Make sure you have completed all the required data elements.
3. Review all entered data for accuracy and consistency.

4. **Note:** There will be an edit message on the ECON function:
08118 Warning TOTAL OF CURRENT DISTR PCTS
EXCEEDS APPOINTMENT'S PCT FULL TIME

This is because the system does not recognize SLO as a non-paying distribution. Updating the Employee Database

Press **F5 Update** to display the PAN Subsystem Notification Preparation screen.

Consistency Edits

If there are consistency edits, the Consistency Edit (ECON) screen is automatically displayed. Review all error messages and make the necessary corrections.

How to Correct Consistency Errors

From the ECON screen you may:

- Correct errors directly on the ECON screen.
- **F3 Return** to the last data entry function, make any corrections, then do one of the following:
 - Press **F5 Update** to invoke PAN.
 - Press **F2 Cancel** twice to cancel the update and leave the EDB unchanged.

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

PAN Preparation

After pressing **F5 Update** from a data entry screen (if there are no consistency edits) or an ECON screen, you are automatically positioned at the PAN **Comments Entry** screen. From here you can add comments and additional reviewers to the PAN.

PAYROLL

1. Add a description of the action and any significant details in the **Comments Entry** screen.
2. Press **F10 NotfPrep** to display the **Notification Preparation** screen, where you can add reviewers as desired.
3. Press **F11 Detail** to display the **Activity Review** screen, where you can review the notification before sending it.
4. Press **F5 Update** to complete the update and send the notification.

If the update is successful, the EAPP function appears and displays:

U0007 UPDATE PROCESS COMPLETE

For more information about PANs and additional PAN features, please refer to [Section 1.8, Post Authorization Notification \(PAN\)](#).

Accessing IMSG

1. To access the Message Report Screen go to the **Next Function** field, type IMSG and press **Enter**.
2. When the IMSG screen is displayed, review any remaining messages and take the appropriate action.

Disposition of Forms

- Forward forms as indicated on your data collection document.