

5.13 CALCULATION/CONVERSION FROM MA TO MO

Overview

The procedures and explanation described in this section are to offer guidance in conversion of hourly casual/restricted student employee appointments to the MO cycle.

There are occasions where undergraduate or graduate student academic employees (Teaching Assistants, Readers, Tutors, etc.) on a monthly cycle, pick up a regular student employee appointment; or when a regular student employee drops a MO student academic appointment, and the service center wishes to return the student employee to the MA pay cycle.

Important Issues of Concern

Timing

- All changes to primary pay cycle (whether MA to MO or MO to MA) must be updated prior to production of timesheets for the month effective.
- Changes to the primary pay cycle must be effective the first of the month.
- Problems with pay will result if the action is not entered at the appropriate time or if pay cycle is changed mid-month.

Refer to [Section 2.3, Timing](#) for more information.

Triggering Deductions If Over 50%

Most (but not all) employees on the MO cycle are appointed at 50%. The addition of any student employee appointment will put these employees over 50% triggering 8.95% of gross Safe Harbor/Medicare deductions from the employee's paycheck.

Should a 50% MO employee take-on an additional student employee appointment, these employees must be informed that they are working over 50% and Safe Harbor/Medicare deductions will be deducted from their pay check. Requests for employee Safe Harbor/Medicare refunds because the service center or the employee was not informed of student Safe Harbor/Medicare regulations are not approved.

Policy Summary

UC employees are appointed on either the MO or the MA payroll cycle, they cannot have concurrent appointments on both. (refer to [Section 2.2, Monthly Payroll Processes](#) for an in-depth explanation of both payroll cycles.)

The MO cycle will take precedence over the MA cycle. So, if an MO appointment is added, the hourly appointment must be converted to the monthly cycle. The student employee appointment can only return to hourly when the MO appointment ends.

MA to MO Conversion:

For the appointment's annual rate, take the hourly rate and multiply by 2088 (working hours in the year).

$$\$6.1400 \text{ (hourly rate)} \times 2088 = \$12820.32$$

For the MO distribution rate for the appointment's distribution, divide by 12 months.

$$\$12820.32 / 12 = \$1068.36$$

Data Entry

Enter the data for the conversion of an hourly casual/restricted appointment to the MO cycle on the EAPP function.

Accessing the EAPP Function

1. Log on to the Payroll/Personnel System.
2. At Next Function, type **EEDB** and press **Enter**.
3. Type **EAPP** and the **employee ID number** and press **Enter**.
The EAPP function will be displayed for the selected employee.

Completing the EAPP Function

THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION

The screenshot shows a terminal window titled "TN3270 - uccmvb to host uccmvb.ucop.edu". The main menu includes "Session", "Edit", "Commands", "Settings", and "Help". The session ID is "PPEAPP0-E1093" and the user is "SHIR 07/08/97 15:37:24". The employee name is "MESSAGE, MISSY M" with SSN "010-00-0200". The appointment details show a rate of 5.8400 and a distribution level of 11. The bottom of the screen shows the time "15:45:53".

Appointment level Procedure

1. Using the end/begin method end the old MA appointment the day *before* the new MO appointment begins.

2. **F9 Jump** to the command line and copy the MA appointment to a new appointment using the “**copy xx to xx**” command.
3. Enter the data in the following fields as appropriate.

Begin date (new MO appt.)	Change begin dates on new MO appt to the day after the MA appt ended (should be the first of the month!).
End date (new MO appt.)	Change the end date on the new MO appointment.
Ann/Hr Rate	change Annual rate to the new appt rate (hrs. x 2088). Change dist. rate to the MO rate (divided by 12)
Rt	change code to A
Sch	change code to MO
Time	change code to A if necessary (because sub 2; or see Payroll Section 2.1)

Distribution Level Procedure

1. End the old MA distribution the day *before* the new MO appointment begins.
2. **F9 Jump** to the command line and copy the MA distribution to a new MO distribution using the “**copy xx to xx**” command.
3. Enter the data in the following fields as appropriate.

Pay Begin date (new MO dist.)	Change begin dates on new MO dist. to the day after the MA appt ended (should be the first of the month!).
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Pay End date (new MO dist)	Change the end date on the new MO distribution..
Rate/Amount	Divide new Annual Rate by 12

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

Restoring MO to MA:

Notes and Tips

- Do not leave an MO appt percentage hanging since it could throw your employee into Safe Harbor.

Appointment level Procedure

- End the old MO appointment & distribution the day *before* the new MA appointment begins.
- F9 Jump** to the command line and copy the MO appointment to a new appointment using the “**copy xx to xx**” command.
- Enter the data in the following fields as appropriate.

Begin Date (new MA appt.)	Change begin dates on new MA appt to the day after the MO appt ended (should be the first of the month!).
End Date (new MA appt.)	Change the end date on the new MA appointment.
Ann/Hr Rate	Restore the new MA hourly rate. For the hourly rate, divide the annual appt rate by 2088 (Be sure the new rate matches the appropriate ER!)
Rt	restore to H
Sch	restore to MA
Time	restore to A, if necessary.

Distribution Level Procedure

1. End the old MO distribution the day *before* the new MA appointment begins.
2. **F9 Jump** to the command line and copy the MO distribution to a new MA distribution using the “**copy xx to xx**” command.
3. Enter the data in the following fields as appropriate.

Begin Date (new MA appt.)	Change begin dates on new MA dist. to the day after the MO appt ended (should be the first of the month!).
End Date (new MA appt.)	Change the end date on the new MA distribution.
Rate/Amount	Restore the new MA hourly rate. For the hourly rate, divide the annual appt rate by 2088 (Be sure the new rate matches the appropriate ER!)

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

Review

Check to be sure your new appointment rates (whether they're MO or MA) match the correct ER for your student employee.

- Hourly rates are four decimal places
- Hourly rates are coded “H MA A”
- Monthly rates are two decimal places
- Monthly rates are coded “A MO A”

Check that Rt, Sch & Time codes match the correct rates. Refer to [Section 2.1, Appointment Coding](#).

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

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 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 screen, 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](#) 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.

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.

You may now start another appointment or distribution level action.

Disposition of Forms

Forward the appropriate approval document to the mandatory reviewer.