6.7 LIMITED TO CAREER

Overview

These procedures apply to employees who were appointed to a limited position through open recruitment and have been designated career to the same position in the same unit. After obtaining appropriate approvals, the service center will process the Limited to Career action. For employees who are limited and appointed to a career position through the recruitment selection, the action shall be processed by SHR Employment.

Policy Summary

A limited appointment may be designated career at any time by the Unit Head if the incumbent was appointed through an open recruitment process and the career appointment is established at 50% time or more and is expected to continue for one year or longer.

In addition, an employee working in a limited position or positions may automatically become career after attaining 1,000 hours of qualifying service in any 12 consecutive months without a break in service of at least 120 consecutive calendar days. The effective date of career status will be the first of the month following 1,000 hours on pay status. The percent of the new career appointment needs to be consistent with the effort expended (i.e., time on pay status) for the limited appointment that is being converted to a career appointment. The service center must take action to denote the appointment as career on the PPS.

A limited position for which there was not an open recruitment (i.e., Limited Non-Recruitment) shall not be designated career.

Listed below are factors to consider when an employee’s status changes from limited to career:

- Benefits eligibility—an employee will become eligible for full health and welfare benefits after attaining 1,000 qualifying hours in a rolling 12-month period. Continued eligibility for full health and welfare benefits will be require a minimum 17.5 hours avg. paid time per week.
- Vacation and Sick Leave eligibility—Leave accrual eligibility is based upon appointment, duration and percent of time.
- UCRP Membership eligibility—an employee will become a member of UCRP after attaining 1,000 qualifying hours in a rolling 12-month period. No minimum hours are required to remain a member of UCRP.
- Merit Eligibility—Merit eligibility is based upon personnel program and appointment type.
- Probationary Period—Employees appointed to a career position normally serve a probationary period during which time their work performance shall be evaluated. Completion of a probationary period varies by personnel program and representation.
- For issues related to the timing of this action, refer to Section 2.3, Timing.

Refer to the SHR Procedures Manual for specific policy guidance before completing the OEU.

Before You Start

Prior to completing the OEU for changing an employee from a limited position to a career position, you have referred to the SHR Procedures Manual for guidance.
The required approval has been obtained to perform the OEU. Notify the employee and supervisor of the effective date of the limited to career action and potential changes to conditions of employment.

Obtain the employee acknowledgment of the limited to career action.

Complete the Benefits Eligibility Level Indicator (BELI) form.

Complete the Data Collection Document (LIMI).

### Data Entry

You will use the LIMI Bundle when processing a limited to career action. This bundle contains the following functions:

- **EAPP** (Appointments/Distributions)
- **EPER** (Personnel/Miscellaneous)
- **EADD** (Employee Address)
- **EPD1** (Employee Personal Data 1)

### Accessing the LIMI Bundle

1. Logon the Payroll/Personnel system.
2. At Next Function, type **EEDB** and press **Enter**.
3. Type **BUND** and press **Enter**.
4. Type **LIMI**, **employee ID number**, and press **Enter**.

The EAPP function will be displayed for the selected employee.

#### Completing the EAPP Function

**THE EAPP (APPOINTMENT/DISTRIBUTIONS) FUNCTION**

**EAPP Notes and Tips**

- When processing a limited to career action, many data elements reflecting conditions of employment will change for an employee.
- It may be advisable to use the “add” command for appointments and distributions to assure greater accuracy.

**Appointment Level Procedure**

1. End current limited appointment and distribution(s) effective the day before the career action is effective.
2. **F9 Jump** to the command line and type “add a” to set up the first available appointment. Press **Enter**.

Payroll/Personnel System
July 2001, University of California, Santa Cruz
3. Enter data in the following fields, as applicable:

<table>
<thead>
<tr>
<th>Actions (Action Code)</th>
<th>Enter Personnel Action Code 52. (Limited to Career)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PGM</td>
<td>Leave Blank. System Derived Code indicating the personnel program associated with the appointment.</td>
</tr>
<tr>
<td>Typ</td>
<td>Enter the Code indicating the appointment type associated with the appointment.</td>
</tr>
<tr>
<td>Bas</td>
<td>For partial-year staff career employees. Enter the Code which indicates the number of months in a year the employee will work.</td>
</tr>
<tr>
<td>Pd Ovr</td>
<td>Leave Blank. Used in academics only.</td>
</tr>
<tr>
<td>Appt Begin</td>
<td>Enter the date on which the employee will be appointed to a career position in the format: MMDDYY.</td>
</tr>
<tr>
<td>Appt End</td>
<td>Enter the date on which the employee’s career position is expected to end, in the format: MMDDYY. If the appointment is indefinite, enter 999999.</td>
</tr>
<tr>
<td>Dur</td>
<td>If Appointment is indefinite, enter I. If Appointment is career, but has an ending date for budgetary purposes only, enter B. Otherwise, leave blank.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter the title code resulting from the limited to career action.</td>
</tr>
<tr>
<td>Grade</td>
<td>If employee is appointed to a grade-based title, then enter the appropriate pay grade for the title.</td>
</tr>
<tr>
<td>%FULL</td>
<td>Enter the percentage of time that the employee is expected to work in the career appointment. Enter 100% as 1.00.</td>
</tr>
<tr>
<td>F/V</td>
<td>Enter the code representing whether the amount of time worked in the appointment is Fixed (F) or Variable (V).</td>
</tr>
<tr>
<td>Annual/Hr</td>
<td>Leave Blank. System will derive.</td>
</tr>
<tr>
<td>Rt</td>
<td>Enter the code that indicates whether the rate of pay is Annual (A), Hourly (H), or By-Agreement (B).</td>
</tr>
<tr>
<td>Sch</td>
<td>Enter the code that indicates which pay schedule the appointment will be paid, either Monthly Current (MO) or Monthly Arrears (MA).</td>
</tr>
<tr>
<td>Time</td>
<td>Enter the code that represents the method of reporting time for the appointment. Enter (T) for Exception Time Reporting or Enter (A) for Positive Time Reporting.</td>
</tr>
<tr>
<td>Lv</td>
<td>Enter the appropriate leave accrual code for vacation and sick leave accrual rates.</td>
</tr>
</tbody>
</table>

4. Press **Enter** to invoke range/value edits.
### Distribution Level Procedures

1. **F9 Jump** to the command line and type “add d” to set up the next available distribution. Press **Enter**.

2. Enter data in the following fields as applicable:

<table>
<thead>
<tr>
<th>Actions (Action Code)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>L</td>
<td>Enter 7 for UCSC location number.</td>
</tr>
<tr>
<td>Acct</td>
<td>Enter ‘organization’ FOAPAL number.</td>
</tr>
<tr>
<td>CC</td>
<td>Enter cost center.</td>
</tr>
<tr>
<td>Fund</td>
<td>Enter fund number.</td>
</tr>
<tr>
<td>PC</td>
<td>Enter activity code (optional, not required).</td>
</tr>
<tr>
<td>Sub</td>
<td>Enter 1 or 2 as applicable.</td>
</tr>
<tr>
<td>FTE</td>
<td>Enter the percentage of the budgeted position which the distribution represents, if applicable. Full Time is entered as 1.00.</td>
</tr>
<tr>
<td>Dist %</td>
<td>Enter the anticipated time which is chargeable to the distribution accounting unit resulting from the change in limited to career. 100% is entered as 1.00.</td>
</tr>
<tr>
<td>Pay Beg</td>
<td>Enter the date on which the salary begins resulting from the limited to career action in the format: MMDDYY.</td>
</tr>
<tr>
<td>Pay End</td>
<td>For indefinite distributions, enter 9999999. Otherwise enter the date on which the pay is expected to end due to account/fund activity in the format: MMDDYY.</td>
</tr>
</tbody>
</table>

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

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

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

### Detailed Instructions

- **Step**: If the employee is appointed to a step-based title code, then enter the step within the salary range associated with the title code. Steps are entered in the following format: 1.0, 1.5, 2.0, 2.5, 3.0, 3.5, 4.0, 4.5, 5.0, etc.

- **O/A**: Leave Blank.

- **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.
Completing the EPER function

The EPER (Personnel Miscellaneous) Function

Notes and Tips

- When processing a limited to career action, the highlighted fields should be the only fields requiring data entry.

**EPER Procedure**

1. Enter data in the following fields as applicable:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned BELI</td>
<td>Enter the Benefits Eligibility code which indicates the employee's eligibility for health benefits.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Enter the effective date of the BELI change. (Usually the limited to career effective date)</td>
</tr>
<tr>
<td>Employee Relations Code</td>
<td>The employee relations code is usually the same in a limited to career action. (same position in the same unit)</td>
</tr>
<tr>
<td>Employee Relations Unit</td>
<td>Leave Blank. System derived.</td>
</tr>
<tr>
<td>Probationary Period End Date</td>
<td>Enter the projected date on which the employee's probationary period of employment is expected to end in the format: MMDDYY.</td>
</tr>
<tr>
<td>Next Salary Review Date</td>
<td>Enter the Next Salary Review Date (merit eligible date) resulting from the limited to career change.</td>
</tr>
<tr>
<td>Next Salary Review Type</td>
<td>Enter the code that represents the type of salary increase for which the employee is next eligible resulting from the change in status.</td>
</tr>
<tr>
<td>Home Department</td>
<td>No need to change if the employee’s home department remains the same after the limited to career action.</td>
</tr>
</tbody>
</table>

2. Press Enter to invoke range/value edits.

3. Press F11 Next Func to continue to the next function.
The EADD (Employee Address) function will be displayed.

**Completing the EADD function**

**THE EADD (EMPLOYEE ADDRESS) FUNCTION**

**EADD Notes and Tips**
- Use your **TAB** or **F15** key for faster navigation through fields where data is not entered.

**EADD Procedure**

1. Enter data in the following field(s) if changing:

| Campus phone(s) | Office telephone phone number(s) at which the employee can be reached. |

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

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

The **EPD1** (Employee Personal Data 1) function will be displayed.
Completing the EPD1 function

THE EPD1 (EMPLOYEE PERSONAL DATA 1) FUNCTION

EDP1 Notes and Tips

- If the information on the EPD1 is current, then you should proceed to Review, since this is the last function in the LIMI bundle.

EPD1 Procedure

1. Enter data in the following fields if changing:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Status Code</td>
<td>Code indicating the employee’s student status with the University of California (not including University Extension enrollment.)</td>
</tr>
<tr>
<td>Pay Disposition Code</td>
<td>Enter Mail Code (See Appendix J, Mail Codes). Used to deliver checks and surepay stubs.</td>
</tr>
</tbody>
</table>

2. Press Enter to invoke range/value edits.

3. This is the last function in the LIMI Bundle. Proceed to Review.

Review

1. Use F10 Prev Func and F11 Next Func to navigate through the functions in the bundle.

2. Make sure you have completed all the required data elements.

3. Review all entered data for accuracy and consistency.

Updating the Employee Database

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

Consistency Edit Errors

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 EAPP 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.

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 first function in the bundle 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 the appropriate approval document to the mandatory reviewer.
- Retain the data collection document in the Service Center employee file.
- Forward the completed BELI form to Payroll.