
7.15 EMERITUS

Overview

The procedures described in this section are for processing an Emeritus appointment for an Academic Senate member who retired and has been separated from the University of California, Santa Cruz.

Policy Summary

1. The title/title suffix Professor Emeritus/Emerita is conferred, upon retirement, on every academic appointee or academic administrative officer who is a member of the Academic Senate.
2. Refer to the [Academic Personnel Manual \(APM\), Section 120, Emeritus Titles](#), for general policy and procedure information.

Before you Start

Verify employee's EDB status is separated the day before proceeding with this action. A separation action and subsequent Emeritus action for the same employee cannot occur on the same day.

Data Entry

You will use the EMTS bundle when processing the Emeritus appointment action. This bundle contains the following functions:

EEID (Employee Identification)

EAPP (Appointments/Distributions)

EADD (Employee Address)

EPD1 (Employee Personal Data)

EPER (Personnel Miscellaneous)

Accessing EMTS

1. Log on to the Payroll/Personnel System.
2. At the **Next Func** field, type **EEDB** and press **Enter**.
3. Type **BUND** and press **Enter**.
4. Type **EMTS** and the **employee ID number**, then press **Enter**.

The EEID function is displayed.

Completing the EEID Function

THE EEID (EMPLOYEE IDENTIFICATION) FUNCTION

The screenshot shows a terminal window titled "TN3270 - uccmvsb to host uccmvsb.ucop.edu". The menu bar includes "Session Edit Commands Settings Help". The main display area shows the following information:

```

PPEEID00-E0943          SCT EDB Entry/Update      AREH 10/14/95 15:33:02
                        Employee Identification      Userid: SCACPLJW

Employee ID      : 650000903
SSN              : 650000903
                  650-00-0903

First Name      : _____
Middle Name     : _____
Last Name       : _____
Suffix          : _____
Result          : REHIRE, LECTUREA DEMO _____
                  REHIRE, LECTUREA DEMO _____

Date of Birth    : 111065
Intercampus Transfer:  _

Next Func:  ___ ID:  ___ Name:  _____ SSN:  _____
U0001 Input accepted
===>
F:  1-Help      2-Cancel      4-Print      5-Update
F:              9-Jump        11-NextFunc
    
```

At the bottom right of the terminal window, it says "IBM-3278-2-E 15:27:18".

Notes and Tips

- Enter the Employee ID number and press **Enter** to range/value. The SSN, Result, and Date of Birth fields are derived from the Employee Data Base and will automatically fill in.
- Review all data displayed from previous record and change only those fields that need to be updated.
- Use F1 Help for field-level or screen-level on-line help.

The EEID Procedure

1. Enter data in the following field and press **Enter** to range/value:

Employee ID	Nine-digit identification number.
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The following fields will derive from the Employee Data Base:

SSN	System derived.
First Name	Employee's first name.
Middle Name	Employee's middle initial or name, as it appears on the employee's Social Security card.
Last Name	Employee's last name. <i>The system will accept a maximum of 26 characters for all three names together.</i>
Suffix	If applicable. Any suffix to the employee's last name, such as Jr. or III. Do not include any degree information, such as MD or Ph.D., in the suffix field.
Result	Employee's name derived by the system.
Date of Birth	Employee's date of birth derived from the EDB.

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

Completing the EAPP Function

THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION

Notes and Tips

- All previous appointments in the EDB should have the retirement date as the end date.
- When processing a change to Emeritus status for an academic employee, set up a new appointment and distribution. Refer to [Section 1.11, Appointments and Distributions](#).
- If the employee has more than one appointment or more than two distributions, these are stored on additional "pages" (functions). Use **F8 Forward** or **F7 Backward** to scroll through the pages.
- Always enter a decimal point in the percentage and rate fields. The decimal point on the keypad may not work.

The Appointment Level Procedure

1. End all previous appointments.
2. Use the **F9 Jump** key or **F15 New Line** to go to the command line.
3. Type **“add a”** to set up a new appointment.
4. Enter data in the following fields as applicable:

Actions (Action Code)	Enter 14, Academic Status Change A code indicating the personnel action which affected the associated appointment.
Pgm	A system derived code indicating the personnel program under which the appointment is held.
Typ	Enter 5 (academic) The code indicates the appointment type associated with the appointment.
Bas	Leave blank.
Pd Ovr	Leave blank.
Appt Begin	Enter the date on which the recall appointment is effective in the format: MMDDYY.
Appt End	Since an emeritus appointment is indefinite, enter 999999.
Dur	Enter I for indefinite.
Dept	A system derived code indicating the department or other administrative unit associated with the appointment.

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Title	Enter 1132 for Professor Emeritus. A code indicating the position or classification title for the appointment.
Grade	Leave blank for academics.
%FULL	Leave blank.
F/V	Enter F for Fixed Enter the code representing whether the amount of time worked in the appointment is fixed (F) or (V).
Annual/Hr	Leave blank.
Rt	Leave blank.
Sch	Leave blank
Time	Enter W, without salary Enter the code that represents the method of reporting time for the appointment.
Lv	Enter N for non-accruing.

The Distribution Level Procedure

1. End all previous distributions.
2. **F9 Jump** to the command line and type “**add d**” to create a new distribution.
3. 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
FTE	Leave blank
Dist %	Leave blank
Pay Beg	Enter date emeritus appointment is effective.
Pay End	Since Professor Emeritus is of indefinite duration, enter 999999.
Step	Enter the step associated with the faculty member’s appointment at the time of retirement.
O/A	If applicable, enter a code indicating that the employee's pay rate was off-scale or above scale at the time of retirement.
Rate/Amount	Leave blank.

DOS	Enter WOS for without salary. Code indicating the type of compensation associated with the distribution.
PRQ	No entry needed. Code indicating the type of perquisite provided.
DUC	A system derived code indicating a group within a bargaining unit to which a distribution for an appointment is assigned for collective bargaining purposes excluding range adjustments.
WSP	Not used for academics.

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

Completing the EADD Function

THE EADD (EMPLOYEE ADDRESS) FUNCTION

Notes and Tips

- The fields most likely to need changes are the address fields.

EADD Procedure

1. Enter data in the following fields, as applicable:

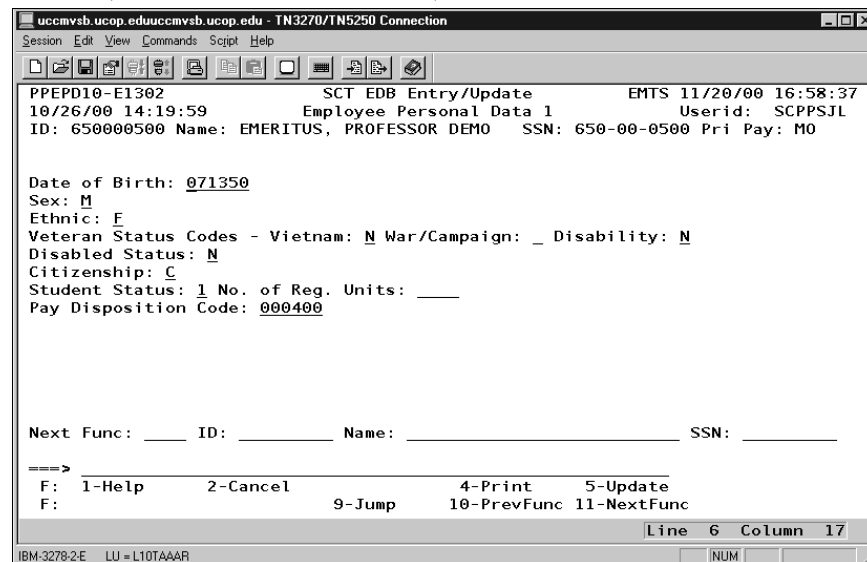
Permanent Address	<p>Line 1: First line of the address to which all university mail may be sent (e.g., benefits statement, tax information.) Maximum 30 characters.</p> <p>Line 2: Automatic continuation of address Line 1, if the first line of the address is exceptionally long (e.g., use for apartment numbers, building names, etc.) Maximum 30 characters.</p>
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Permanent Address	<p>City: City portion of the address. United States and foreign addresses. Maximum 21 characters.</p> <p>State: State portion of the address. United States addresses only.</p> <p>Zip: Zip code associated with the address. United States addresses only.</p>
Foreign Address	<p>Ind: Enter F if this is a foreign address.</p> <p>Prov: Foreign addresses only. Province associated with the address, if applicable. Maximum 30 characters.</p> <p>Cntry: Foreign address only. Two-digit country code associated with the address. Press F1 Help from this field to see valid codes.</p> <p>Postal Code: Foreign addresses only. Postal code associated with the address, if applicable.</p>
Campus Phone(s)	Office telephone 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.

Completing the EPD1 Function

THE EPD1 (EMPLOYEE PERSONAL DATA 1) FUNCTION



EPD1 Procedure

1. Enter data in the following field, as applicable:

Pay Disposition Code	Enter Mail Code (See Appendix J, Mail Codes). Used to deliver checks and surepay stubs.
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2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.

Completing the EPER Function

THE EPER (PERSONNEL-MISCELLANEOUS) FUNCTION

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TN3270 - uccmvsb to host uccmvsb.ucop.edu
Session Edit Commands Settings Help
PPEPER0-E0943 SCT EDB Entry/Update EMTS 10/15/95 17:19:29
10/15/95 13:27:10 Personnel-Miscellaneous Userid: SCACPLJW
ID: 650000500 Name: EMERITUS, PROFESSOR DEMO SSN: 650-00-0500 Pri Pay: MO

Assigned BELI: 5 Derived BELI : 1 Effective Date: 070199
BELI Status Qualifiers: Primary: ___ Date: ___ Secondary: ___ Date: ___
Date of Hire : 070195 Original Hire Date: ___
Employee Relations Code : E Employee Relations Unit: 99
Probationary Period End Date : ___
Next Salary Review Date : ___ Next Salary Review Type: _
Merit Rate Increase Percent : ___
Home Department : 000900 TRAINING ON-LINE UPDATE
Primary Title Code : 1100 PROFESSOR - 9-MONTHS
Employee Unit Code : AZ Employee Representation Code : 0
Employee Special Handling Code: ___ Employee Distribution Unit Code: _
Job Group ID : CC
Alternate Department Code : ___
Academic Programmatic Unit Cd : ___

Next Func: ___ ID: ___ Name: ___ SSN: ___

===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 9-Jump 10-PrevFunc 11-NextFunc
IBM-3278-2-E 17:13:48
    
```

The EPER Procedure

1. Enter data in the following fields, as applicable:

Assigned BELI	Enter 5 for WOS appointment. Benefits Eligibility Level Indicator (BELI) code indicating the employee's eligibility for health benefits.
Derived BELI	System-derived BELI code based on data entered previously. Normally the same as the assigned BELI code.
Effective Date	Date the assigned BELI takes effect.
Date of Hire	Date on which the Emeritus appointment commences. See <i>Notes and Tips</i> .

Original Hire Date	Leave blank.
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2. Press **Enter** to invoke range/value edits.
3. This is the last function in the bundle. Proceed to *Review*.

Review

Use **F10 Prev Func** and **F11 Next Func** to navigate through the Review bundle.

1. Make sure you have completed all the required data elements in the bundle.
2. Review all entered data for accuracy and consistency.

Updating the Employee Database

Press **F5 Update** to invoke any consistency edits and 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 bundle, make any corrections, then do one of the following:
 - Press **F5 Update** to invoke PAN.
 - Press **F2 Cancel** twice to cancel the update.

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.
- Forward a copy of the data collection document(s) to employee's office of record for placement in the employee's file.
- Forward the completed BELI form to Payroll.