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/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

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:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>Nine-digit identification number.</td>
</tr>
</tbody>
</table>

The following fields will derive from the Employee Data Base:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN</td>
<td>System derived.</td>
</tr>
<tr>
<td>First Name</td>
<td>Employee’s first name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Employee’s middle initial or name, as it appears on the employee’s Social Security card.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Employee’s last name. <em>The system will accept a maximum of 26 characters for all three names together.</em></td>
</tr>
<tr>
<td>Suffix</td>
<td>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.</td>
</tr>
<tr>
<td>Result</td>
<td>Employee’s name derived by the system.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Employee’s date of birth derived from the EDB.</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actions</td>
<td>Enter 14, Academic Status Change</td>
</tr>
<tr>
<td>(Action Code)</td>
<td>A code indicating the personnel action which affected the associated appointment.</td>
</tr>
<tr>
<td>Pgm</td>
<td>A system derived code indicating the personnel program under which the appointment is held.</td>
</tr>
<tr>
<td>Typ</td>
<td>Enter 5 (academic)</td>
</tr>
<tr>
<td>Bas</td>
<td>Leave blank.</td>
</tr>
<tr>
<td>Pd Ovr</td>
<td>Leave blank.</td>
</tr>
<tr>
<td>Appt Begin</td>
<td>Enter the date on which the recall appointment is effective in the format: MMDDYY.</td>
</tr>
<tr>
<td>Appt End</td>
<td>Since an emeritus appointment is indefinite, enter 9999999.</td>
</tr>
<tr>
<td>Dept</td>
<td>A system derived code indicating the department or other administrative unit associated with the appointment.</td>
</tr>
</tbody>
</table>

Payroll/Personnel System
July 1997, University of California, Santa Cruz
**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:

<table>
<thead>
<tr>
<th>Actions (Action Code)</th>
<th>Leave blank</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 0</td>
</tr>
<tr>
<td>FTE</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Dist %</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Pay Beg</td>
<td>Enter date emeritus appointment is effective.</td>
</tr>
<tr>
<td>Pay End</td>
<td>Since Professor Emeritus is of indefinite duration, enter 999999.</td>
</tr>
<tr>
<td>Step</td>
<td>Enter the step associated with the faculty member’s appointment at the time of retirement.</td>
</tr>
<tr>
<td>O/A</td>
<td>If applicable, enter a code indicating that the employee's pay rate was off-scale or above scale at the time of retirement.</td>
</tr>
<tr>
<td>Rate/Amount</td>
<td>Leave blank.</td>
</tr>
</tbody>
</table>
ACADEMIC ACTIONS

<table>
<thead>
<tr>
<th>DOS</th>
<th>Enter WOS for without salary. Code indicating the type of compensation associated with the distribution.</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRQ</td>
<td>No entry needed. Code indicating the type of perquisite provided.</td>
</tr>
<tr>
<td>DUC</td>
<td>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.</td>
</tr>
<tr>
<td>WSP</td>
<td>Not used for academics.</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Permanent Address</th>
<th>Line 1: First line of the address to which all university mail may be sent (e.g., benefits statement, tax information.) Maximum 30 characters.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

Payroll/Personnel System
March 2003, University of California, Santa Cruz
### 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.

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

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

Completing the EPER Function

THE EPER (PERSONNEL-MISCELLANEOUS) FUNCTION

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

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.