HIRING OR REHIRING AN EMPLOYEE

General Procedures

The procedures described in this section are for hiring an employee for a staff or academic position.

- No prior service with UCR.
- A break in service with UCR of more than 13 months (i.e., no longer in the database).
- Transfer from another UC campus.
- Transfer from a UC Laboratory or the State of California.
- Transfer from Systemwide Administration.
- Prior service with another UC campus.
- Prior service with a UC Laboratory or the State of California.
- Prior service with Systemwide Administration.

Rehire

- Preferential UCR rehire status.
- A break in service with UCR of less than 13 months (i.e., still in the database).
Workflow for Hire/Rehire Actions

The following procedures determine how to complete the hire/rehire process for an employee, (monthly and hourly, staff and academic).

1. Obtain pre-authorization approvals.

2. Complete the following forms:
   - Employment Eligibility Verification, with attachments (form I-9), (if the original was completed more than one year ago.) (Retained in Department)
   - Oath of Allegiance/Patent Agreement (form UPAY 585), (if the original was completed more than one year ago.) (Retained in Department)
   - Federal and State Withholding Allowance Certificates (forms W-4, W-4A) (Retained in Department)
   - Earnings Disposition (SUREPAY) (form UPAY 702) (if applicable) (Retained in Department)
   - Affirmative Action Data Transmittal (form U5605) (Destroy after entering data.)
   - Ensure that employees who are not US Citizens have proper authorization to be employed at the Universitity. The Payroll Office must receive appropriate paperwork for all alien employees authorizing employment for the employee.
   - If the employee is eligible for Benefits, ensure that all appropriate Benefits forms are completed and submitted to Payroll.

   NOTE: There may be additional documents required depending on the position the employee is hiring into (e.g., the Adult/Child Abuse form must be completed for certain department positions).

3. Complete all the screens in the appropriate bundle and update the database. When the update is successful, the message: U0007 Update process complete is displayed and you are returned to the first screen in the bundle.
General Procedures, cont.

To Begin
(for all hire actions)...

1. Access the Function Code Menu.

2. At next func, type the bundle function code.
   For example, type HIRE to select Hire.
   The Employee Identification screen (EIID) is displayed.

(for all rehire actions)....

1. Access the Function Code Menu. At next func, type BUND for the
   Bundle Menu.

2. At next func, type bundle function code.
   For example, type SREH (staff rehire) or AREH (academic rehire) to select Rehire.
   The Separation screen (ESEP) is displayed.

3. (*) all the data on the ESEP - Separation screen. Press F11 for next screen. Which is the EPDL - Employee
   Personal Data 1 screen.

UCR - HIRE/REHIRE
Revision: 1.0
EEID (Employee Identification)

Data Element Definitions
(required data elements are highlighted)

Employee ID:
Type the employee social security number.

SSN:
Nine-digit social security number, without hyphens

First Name:
Employee's first name.

Middle Name:
Employee's middle name or initial, if applicable.

Last Name:
Employee's last name. (The system will accept a maximum of 26 characters for the three names together, first, middle, and last).

Suffix:
If applicable. Any suffix to the employee's last name, such as Jr. or III. Do not include any degree information.

Result:
System-derived employee name, e.g., STUBB, SAMUEL PAY.

Notes and Tips

1. This screen allows entry and update of employee identification information, such as Name, Social Security Number, and Date of Birth.

2. Do not enter commas or periods in the first, middle, or last name fields.

3. For rehires, only change those fields that need to be updated.
### EEID (Employee Identification)

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>999999990</td>
</tr>
<tr>
<td>SSN</td>
<td>999999990</td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Suffix</td>
<td></td>
</tr>
<tr>
<td>Result</td>
<td>RESOURCES, HERMAN, RESOURCES, HERMAN</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>122150</td>
</tr>
<tr>
<td>Intercampus Transfer</td>
<td></td>
</tr>
</tbody>
</table>

#### Notes and Tips

3. After completing all the required data entry fields on this screen, press <ENTER>. The screen will display 'Input Accepted'. Press <F11 Next Func> to continue to the next screen.

---

### Data Element Definitions

*(required data elements are highlighted)*

#### Date of Birth:

Employee's date of birth in the format: mmddyy. For example, if the employee's birthdate is July 3, 1968, enter 070368.

#### Intercampus Transfer:

If applicable, enter the Personnel Action Code that will establish the hire as an intercampus transfer (or systemwide/state/lab transfer). Press <F1 Help> to see valid codes.

---

UCR - HIRE/REHIRE
Revision: 1.0
1.5
EPD1 (Employee Personal Data 1)

Data Element Definitions
(required data elements are highlighted)

Permanent Address

Line 1:
First line of the address to which all University mail will be sent (e.g., benefits statement, tax information)

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.).

City:
City portion of the address. United States and foreign addresses

State:
State portion of the address. United States addresses only.

Zip:
Zip code associated with the address. United States addresses only

Foreign Address Ind:
Letter (F) indicating whether this is a foreign address

Prov:
Foreign addresses only Province associated with the address, if applicable.

Cntr:
Foreign addresses only Two-digit country code associated with the address. Press <F1 Help> to see valid codes.

Notes and Tips

• This is the first of two screens which allow entry and update of personal information for an employee. Information such as home address, ethnicity, and citizenship status are entered at this screen.

• For rehires, only change those fields that need to be updated.

UCR - HIRE/REHIRE
Rev: 'on: 1.0
Data Element Definitions
(required data elements are highlighted)

Postal Code:
Foreign addresses only. Postal code associated with the address.

Campus Address:
Room: Campus room number where employee is physically located.
Building: Building number associated with the campus address and room number.

Campus Phone 1:
Primary office telephone number at which the employee can be reached.

Phone 2:
If applicable. Secondary office phone number.

Date of Birth:
System-derived, six-digit employee birthdate.

UC Directory Disclosures - Perm Addr:
Code indicating whether the employee has authorized the University to publish their permanent address in the UC Directory. Press <F1 Help> to see valid codes.
## Data Element Definitions

*(required data elements are highlighted)*

### Employee Organization Home Address Disclosure:
Code indicating whether the employee has authorized the University to release their home address to employee organizations. If authorization is not given, mail from these organizations will be sent to the employee's campus address. Press <F1 Help> to see valid codes.

**Sex:**
Code indicating the sex of the employee. (For reporting statistics of the University workforce, only.) Press <F1 Help> to see valid codes.

**Ethnic:**
Code indicating the ethnic identity of the employee. (For reporting statistics of the University workforce, only.) Press <F1 Help> to see valid codes.

**Disability:**
Code indicating any disabilities the employee may have. (For reporting statistics of the University workforce, only.) Press <F1 Help> to see valid codes.

**Veteran:**
Code indicating employee's veteran status. (For reporting statistics of the University workforce, only.) Press <F1 Help> to see valid codes.

**Veteran Disability:**
Code indicating any veteran disabilities the employee may have. (For reporting statistics of the University workforce, only.) Press <F1 Help> to see valid codes.

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**Notes and Tips**

**UCR - HIRE/REHIRE**
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1.8
EPD1 (Employee Personal Data 1)

Data Element Definitions
(required data elements are highlighted)

Student Status:
Code indicating the employee's student status with the University of California (not including University Extension enrollment). Press <F1 Help> to see valid codes.

Citizenship:
Code indicating the employee's citizenship status, with respect to the United States. Press <F1 Help> to see valid codes.

Number of Registered Units:
Number of UC class units registered (used to determine whether a student qualifies for FICA exemption).

Notes and Tips

- After completing all the required data entry fields on this screen, press <F11 Next Func> to continue to the next screen.
EPD2 (Employee Personal Data 2)

Data Element Definitions
(required data elements are highlighted)

Oath Signature Date:
US Citizens only. Date the Oath of Allegiance form was signed by the employee, in the format: mmddyy. For example, if the form was signed on March 1, 1994, it is entered as 030194.

I-9 Date:
Date the I-9 (Employment Eligibility Verification) form was signed by the employee, in the format: mmddyy.

Education Level Code:
Code indicating the highest level of education attained by the employee. Press <F1 Help> to see valid codes.

Education Level Year:
Year in which the employee's highest level of education was attained.

Non-UC Prior Service Code:
Code indicating the type of employment service prior to the most recent University employment. Press <F1 Help> to see valid codes.

Prior Service Months:
For future use only.

Prior University Service Institution Code:
For future use only.

Employment Service Credit:
For future use only.

Notes and Tips

- This is the second of two screens which allow entry and update of personal information for an employee. Information such as education level and oath signature date are entered at this screen.
- For rehires, only change those fields that need to be updated.
Data Element Definitions
(required data elements are highlighted)

Employment Service Credit From Date:
For future use only

Current Specialty Code:
Academic only. Code indicating the employee's specialty area. Press <F1 Help> to see valid codes.

Highest Degree Specialty Code:
Code indicating the institution at which highest degree obtained in the specialty was obtained. Press <F1 Help> to see valid codes.

Highest Degree Institution Code:
Code indicating the institution at which the highest degree in the specialty was obtained. Press <F1 Help> to see valid codes.

Notes and Tips

- After completing all the required data entry fields on this screen, press <F11 Next Func> to continue to the next screen.
ECHK (Check/Surepay Disposition)

Data Element Definitions
(required data elements are highlighted)

Check Disposition:
- System derived value. Default value (3) indicates
- Departmental Pick-up, 8 indications SurePay (entered by
- Payroll)

Surepay Table Key
- Alphanumeric code for the bank found on the Surepay Bank
- Table.

Checking/Savings Indicator:
- One character which indicates the type of account. (Checking
- = C; Savings = S)

Bank Account Number:
- Provided by employee.

Bank Account Format:
- System derived field displayed after entering the Bank Table
- Key, the Check/Savings indicator and pressing enter. This
- display will verify number of characters needed in Bank
- Account Number.

Prenote Indicator:
- System derived field.

Prenote Cycle:
- System derived field.

Notes and Tips
- After completing all the required data entry
- fields on this screen, press <F11 Next Func> to
- continue to the next screen.
ETAX (Tax Information)

Federal
Marital Status: M
Personal Allowances: 0
Maximum Withholding: 999

California
Marital Status: M
Personal Allowances: 0
Treated Deductions: 0
Other State Tax CA Res: Other State Name:
Maximum Withholding: 999
Additional Withholding:
Federal:
California:

Earned Income Credit Status:

SSN: 999999998
Next Func: ID: Name: SSN:

F: 1-Help 3-Prev/Menu 4-Print 5-Update
F: 9-Jump 12-Exit

Notes and Tips

- This screen allows entry and update of tax information for an employee, such as federal and state withholding allowances, for example.

- For rehires, only change those fields that need to be updated.

Data Element Definitions
(required data elements are highlighted)

Federal
Marital Status:
For federal taxation, the marital status code indicated on the employee's W-4 Federal.

Personal Allowances:
For federal taxation, the total number of allowances indicated on the employee's W-4 Federal. (If the employee is claiming tax Exempt, enter 998.)

Maximum Withholding:
System-derived code indicating the total number of Federal exemptions the employee can claim.

State
Marital Status:
For state taxation, the marital status code indicated on the employee's W-4 State.

Personal Allowances:
For state taxation, the number of allowances indicated on the employee's W-4 State. (If the employee is claiming tax Exempt, enter 998.)

Itemized Deductions:
For state taxation, the number of additional allowances for estimated deductions indicated on the employee's W-4 State.

UCR - HIRE/REHIRE
Revision: 1.0
1.13
ETAX (Tax Information)

Data Element Definitions
(required data elements are highlighted)

Maximum Withholding:
System-derived code indicating the total number of State exemptions the employee can claim.

Additional Withholding
- Federal:
The total monthly amount of additional Federal tax the employee requests to be withheld from each paycheck. Enter an asterisk (*) to indicate no additional withholdings.
- State:
The total monthly amount of additional State tax the employee requests to be withheld from each paycheck. Enter an asterisk (*) to indicate no additional withholdings.

SSN:
System-derived employee social security number.

Earned Income Credit Status:
If applicable. Status indicated on a W-5 form for the employee.

Notes and Tips

- After completing all the required data entry fields on this screen, press <F11>Next Func> to continue to the next screen.
UNIVERSITY OF CALIFORNIA EMPLOYEE'S FEDERAL-STATE
WITHHOLDING ALLOWANCE CERTIFICATE

PLEASE PRINT

1995

W4

EMPLOYEE NUMBER (4-19)

DATE PREPARED (10-18)

SOCIAL SECURITY NUMBER (10-27)

BIRTHDATE 8-19-31

MARITAL STATUS Check ( ) one box for Federal and one box for State.

FEDERAL (28)

SINGLE  ■

MARRIED  □

SINGLE or MARRIED with

MARRIED PERSONS

STATUS/WITHHOLDING ALLOWANCES

two or more incomes  ■

HEAD OF HOUSEHOLD  ■

EMPLOYER'S NAME AND ADDRESS

EMPLOYER IDENTIFICATION NUMBER

ACCOUNTING OFFICE TO COMPLETE ONLY IF SENDING TO IRS AND/OR EDD

PURPOSE: The purpose of this form is to enter your personal income tax withholding status into the University payroll system so that the appropriate amounts of Federal and State taxes can be withheld from your pay.

INSTRUCTIONS. Complete the information in the boxes above. Use the attached Internal Revenue Service Instructions for Form W-4 and the attached State of California Employee's Withholding Allowance Certificate (Form DE 4) instructions to calculate your withholding allowances. Transfer your number of State allowances from the State Form DE 4 to the boxes on line 2a and 2b, below. Transfer your number of Federal allowances from the Federal Form W-4 to the box on line 3, below. Complete the rest of this form if applicable. Sign and date this form and submit it to the appropriate University office. KEEP THE ATTACHED FEDERAL AND STATE INSTRUCTIONS AND WORKSHEETS FOR YOUR REFERENCE.

1. If you are exempt from California State income tax withholding because you are a nonresident of the State of California and are earning compensation while located outside the State, check the box to the right and leave lines 2a, 2b, and 2c blank. □

2. STATE

   a. Total number of regular allowances you are claiming for this job (see green State Form DE 4, Worksheet A) ...

   b. Total number of additional allowances for estimated deductions, if entitled (see green State Form DE 4, Worksheet B) ...

   c. Total of lines 2a and 2b ...

3. FEDERAL total number of allowances you are claiming (see white Federal Form W-4). ...

4. EXEMPTION FROM WITHHOLDING OF FEDERAL/STATE INCOME TAX (If you claim exemption from withholding, it will automatically expire on February 15 of next year unless you file a new UC W-4/DE 4 on or before February 15 of next year.)

   I claim exemption from Federal and State withholding and I certify that I meet BOTH of the following conditions for exemption:

   * Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND

   * This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

   If you meet both of the above conditions, enter the year effective and "EXEMPT" here □

   NONRESIDENT ALIENS - Do not complete item 4.

   KEY ENTRY:

   USE THESE CODES IF EMPLOYEE CLAIMS EXEMPT STATUS

   (1-2) WE FED (20-30) 998 STATE (31-33) 998

5. ADDITIONAL TAX WITHHOLDING Additional amount, if any, you want deducted each month. (DO NOT COMPLETE SHADED AREAS)

   a. AUTHORIZATION FOR ADDITIONAL FEDERAL TAX WITHHOLDING (Complete this part to deduct or cancel additional federal tax.)

      I hereby authorize the Accounting Office to deduct from my salary the additional MONTHLY tax amount specified in this box (see white Federal Form W-4). This authorization will continue to be in effect until my employment is terminated or until I submit a new UC W-4/DE 4 to change or cancel the deduction.

      NONRESIDENT ALIENS - Federal regulations require that you request additional FEDERAL tax withholding on line 5a, above. Refer to IRS Publication 515 or Circular E, Employer's Tax Guide, for more information.

   (CHECK APPROPRIATE BOX) □ \$ ● X 1 (1-2) 90103 (10-23) NEW CANCEL CHANGE

   b. AUTHORIZATION FOR ADDITIONAL STATE TAX WITHHOLDING (Complete this part to deduct or cancel additional State tax.)

      I hereby authorize the Accounting Office to deduct from my salary the additional MONTHLY tax amount specified in this box (see green State Form DE 4, Worksheet C). This authorization will continue to be in effect until my employment is terminated or until I submit a new UC W-4/DE 4 to change or cancel the deduction.

      NONRESIDENT ALIENS - Federal regulations require that you request additional STATE tax withholding on line 5b, above. Refer to IRS Publication 515 or Circular E, Employer's Tax Guide, for more information.

      (CHECK APPROPRIATE BOX) □ \$ ● 5011G (30-35) NEW CANCEL CHANGE

CERTIFICATION Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate or entitled to claim exempt status.

EMPLOYEE'S SIGNATURE

DATE 9-7-95

RETN 3 YEARS AFTER EMPLOYEE TERMINATES
EALN (Alien Information)

Data Element Definitions
(required data elements are highlighted)

Citizenship:
System-derived code (entered on EPD1 screen).

Country of Residence:
Code indicating the country of residence for all aliens, except Permanent Residents of the United States.

Visa Type:
Type of visa held by the employee (all aliens).

Visa/Work Permit End Date:
Expiration date of the Visa or Green Card held by the employee.

For Payroll Use Only:
Tax Treaty Income Code:
Alt Tax Treaty Income Code:
Article Number:
End Date:

Notes and Tips

- This screen allows entry and update of information related to the employee's citizenship status, and related information for employees who are not United States citizens, such as visa type, country of residence, and tax treaty information.
### Data Element Definitions
(required data elements are highlighted)

#### For Payroll Use Only (cont.):
Income Limit:

Non-Resident Alien Tax Form Indicator:

#### Notes and Tips
- After completing all the required data entry fields on this screen, press <F11 Next Func> to continue to the next screen
Appointment and Distribution Line Procedures

Use the following procedures to add or change appointments and/or distributions. When changes are required, this is indicated in Notes and Tips within the procedure:

Navigational Tips:

- The <Tab> key can be used to move the cursor from one modifiable field to another.
- To go directly to an existing appointment or distribution line; Type "GOTO nn" (i.e., nn = an existing appointment or distribution number) to place the cursor on the screen which contains information associated with the specified appointment or distribution number.

Ending the current appointment or distribution:

1. Tab to the Appointment End Date field and type the new end date.
2. If the Appointment Duration is "Tenured" or "Indefinite", type asterisk (* ) to delete the current information.
3. If applicable, tab to the FTE field and type asterisk ( * ) to delete this information.
4. Tab to the Distribution End Date field and type the new end date.
5. Repeat for multiple distributions, if applicable.
Appointment and Distribution Line Procedures (Cont.)

Adding a new appointment or distribution:

1. Tab to the command line.
2. Type "ADD A" to assign the next available appointment number, or type "ADD nn" (i.e., nn = 10,20,30) to assign a specific appointment number.
3. Press <Enter> to display the EAPP screen with the new appointment line.
4. Enter data in the required fields on the EAPP screen.
5. Tab to command line and type "ADD D" to assign the next available distribution number, or type "ADD nn" (i.e., nn = 11, 21, 31) to assign a specific distribution number in conjunction with the appointment number.
6. Press <Enter> to position the cursor at the new distribution line.
7. Enter the data in the required fields on the new distribution line.
8. If applicable, repeat step 5 to add additional distribution lines or use the "COPY" function (described below or refer to the User's Guide.)

Copying an existing appointment or distribution line:

1. Tab to command line.
2. Type "COPY xx to yy" to copy data from an existing appointment or distribution line to a specified new appointment or distribution line (i.e., xx = existing appointment or distribution line number; yy = specified new appointment or distribution line number).
3. Press <Enter> to display the new line with the specified appointment or distribution number (all other fields will be identical to the "copied from" appointment or distribution line).
4. Enter the data to be changed in the required fields on the new appointment or distribution line.
5. If applicable, repeat step 2 or 3 to copy additional appointment or distribution lines.

See the section titled Screen Navigation/Data Entry of the Payroll/Personnel Online System User's Guide for more information.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

Appt:
Number that uniquely identifies an appointment and associated data.

Pgm:
System-derived Personnel Program code. (Derived from the Title Code field.) Press <F1 Help> to see valid codes.

Typ:
Code indicating the appointment type status associated with the appointment. Press <F1 Help> to see valid codes.

Bas:
Academic and/or partial-year staff career employees. Code indicating the number of months in a year the employee will work. Press <F1 Help> to see valid codes.

Pd Ovr:
Academic employees only. Code indicating the number of months in the year over which the salary for the appointment will be paid. Press <F1 Help> to see valid codes.

Appts/Distributions Begin:
Date on which the employee's appointment is effective, in the format: mmddyy.

Appts/Distributions End:
Date on which the appointment is expected to end, in the format: mmddyy. If the appointment is indefinite, enter 999999.

Notes and Tips

- This screen allows entry and update of one appointment and up to four distributions per screen.
- For rehires, only change those fields that need to be updated.
- See Appointment and Distribution Line Procedures at the beginning of this section.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

Dur:
Code indicating the expected duration of the appointment, if applicable. Press <F1 Help> to see valid codes.

Dept:
System-derived code indicating the department in which the employee has an appointment.

Title:
Code indicating the classification title. Press <F1 Help> to see valid codes.

Grade:
Pay grade within the salary range associated with the title code. Executive pay grade values are alphabetic; MAP and AAPS pay grades are numeric; for Staff and Academic employees, leave blank. Press <F1 Help> to see valid codes.

% Full:
The percentage of time the employee is expected to work in the appointment.

F/V:
Code indicating whether the time the employee will work in the appointment is a fixed (F) or variable (V) percentage of time.

Ann/Hr Rate:
System-derived value indicating the salary or hourly rate the employee earns.

Notes and Tips

• If there are more than four distributions associated with an appointment, the additional distributions can be viewed by scrolling to additional screens.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

Rt:
Code indicating whether the rate of pay is hourly, annual or by agreement. Press <F1 Help> to see valid codes.

Sch:
Code indicating the pay schedule on which the appointment will be paid, either hourly or monthly. Press <F1 Help> to see valid codes.

Time:
Code indicating the method for reporting time worked in the appointment. Press <F1 Help> to see valid codes.

Lv:
Code indicating the rate at which vacation and sick leave will be accrued. Press <F1 Help> to see valid codes, or F2 for extended Help.

Dist No:
Number uniquely identifying the payroll distribution associated with the appointment.

L/Acct/Fund/Sub:
Code indicating the full accounting unit to which pay will be charged for this appointment. Press <F1 Help> to see valid codes.

FTE:
If applicable. The percentage of the budgeted position which the distribution represents.

Notes and Tips
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

Dist %:
The anticipated percentage of time which is chargeable to the account/fund.

Pay Beg:
Date on which the pay should be charged to the account/fund, in the format: mmddyy.

Pay End:
Date on which pay is expected to end for the account/fund, in the format: mmddyy.

St:
If applicable. The step within the salary range associated with the title code.

O/A:
If applicable. Code indicating the off-step or above scale pay rate of the employee in relationship to the step and/or salary range for the title code of the appointment. Press <F1 Help> to see valid codes.

Rate/Amount:
The monthly, hourly, by agreement, or pay period amount associated with the distribution.

DOS:
Code indicating the type of compensation associated with the distribution. Press <F1 Help> to see valid codes.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

PRQ: If applicable. Code indicating that the employee will have a perquisite amount deducted from total compensation (e.g., for meals or room and board). Press <F1 Help> to see valid codes.

D: For future use only.

F: If applicable. Code indicating the type of Work Study Program that will partially fund the employee's pay. Press <F1 Help> to see valid codes.

Notes and Tips

* Contact the Office of Financial Aid for Workstudy Program information.
Data Element Definitions
(required data elements are highlighted)

Assigned BELI:
Benefits Eligibility Level Indicator (BELI) code indicating the employee's eligibility for health and/or welfare benefits.
Press <F1 Help> to see valid codes.

Derived BELI:
System-derived BELI code based on data entered previously.
Usually the same as the Assigned BELI code.

Effective Date:
Date the employee becomes eligible for any health and/or welfare benefits. See Notes and Tips.

BELI Status Qualifiers (For Academic Use only):
For staff employees, please contact Human Resources.

Primary:
Code indicating the primary condition that qualifies the employee for health and/or welfare benefits. Press <F1 Help>
to see valid codes.

Date:
Date on which the qualifying condition began, in the format: mmdyy.

Secondary:
If applicable. Code indicating an additional condition that qualifies the employee for health and/or welfare benefits.
Press <F1 Help> to see valid codes.

Notes and Tips

- This screen allows entry and update of information that addresses the nature the employee's relationship to the University. Information such as Probationary Period, Salary Review Date, and Home Department is entered at this screen.

- BELI Effective Date- If the employee is not eligible for any benefits, enter the hire date, i.e., this is the date they could be eligible for benefits.
Data Element Definitions
(required data elements are highlighted)

Date:
Date on which the additional qualifying condition began, in the format: mmddyy.

Date of Hire:
The most recent hire date, in the format: mmddyy.

Original Hire Date:
Rehire only. The earliest date of prior employment with the University.

Employee Relations Code:
Code indicating the employee designation/status for the purpose of collective bargaining. Press <F1 Help> to see valid codes.

Probationary Period End Date:
Staff only - if applicable. Projected date on which the employee will complete probationary period, in the format: mmddyy.

Next Salary Review Date:
Staff only. Code indicating the date on which the employee will be considered for a salary review, in the format: mmddyy.

Next Salary Review Type:
Staff only. Code indicating the type of salary increase the employee will be eligible to be considered for at review time. Press <F1 Help> to see valid codes.
Data Element Definitions
(required data elements are highlighted)

Home Department:
Two-digit home department code. Press <F1 Help> to see valid codes.

Primary Title Code:
System-derived for employees with multiple titles. Code indicating the primary title that will be used for reporting purposes.

Employee Unit Code:
System-derived code indicating the collective bargaining unit associated with the employee's job title.

Employee Representation Code:
System-derived code indicating, for collective bargaining purposes, whether the employee is covered, not covered, or a supervisor.

Employee Special Handling Code:
For future use only (related to collective bargaining).

Employee Distribution Unit Code:
For future use only (related to collective bargaining).

Job Group ID:
System-derived code used in Affirmative Action reporting.

Alternate Department Code:
Code indicating an alternate department that may update the employee's personnel record. Press <F1 Help> to see valid codes.

Notes and Tips

- After completing all the required data entry fields on this screen, press <F1 Next Func> to continue to the next screen.
ERET (Retirement Information)

Data Element Definitions
(required data elements are highlighted)

Retirement System Code:
Code indicating the retirement plan for which the employee's appointment type status, duration of employment, and percentage of time qualifies. Press <F1 Help> to see valid codes.

FICA Eligibility Code:
Code is system-derived.

Notes and Tips

- This screen allows entry and update of an employee's retirement information as well as the savings programs the employee has selected. Information such as Retirement System Code and DCP (Defined Contribution Plan) Code is entered at this screen.

- For rehires, only change those fields that need to be updated.
EBCC (Background Check)

**Data Element Definitions**
(required data elements are highlighted)

**Code:**
If applicable, enter the code corresponding to the type of background check conducted <F1 for Help>.

**Date:**
Enter date the background check was conducted; in mmdyyyy format.

Notes and Tips
Update the Employee Database (EDB)

1. Ensure you have completed all the required data elements in the bundle.
2. Press <F5 Update> to update this employee record in the EDB.
3. If the update is successful, the first screen in the bundle is displayed, with the following message: U0007 Update process complete.

   You are returned to the first screen in the bundle so you can begin another hire or rehire action.
   Additional options are available as follows:
   • To choose a different employee action, press <F3 Previous Menu> to return to the previous menu.
   • To go to another function, move to the "Next Function" field and enter the new function code.
   • To exit the Online Payroll/Personnel System, press <F12 Exit>. You will be returned to the CICS Application menu.

4. If the update is not successful, there are consistency edit problems with the data you entered and the Consistency Edit (BCON) screen is displayed (see sample screen on the following page) listing consistency errors associated with this record.
Correcting Consistency Edit Problems (ECON)

If there are consistency errors, the update process will not be successful. The consistency edit (ECON) screen will be displayed. Review all error messages to determine appropriate action to be taken. You can correct errors directly on the ECON screen, or press <F3 Return> to return to the data entry screen to make the necessary corrections, or press <F2 Cancel> to cancel the update. If <F6 NextMsg> is appearing at the bottom of the screen, press F6 to display next error message. After you have received and/or corrected all error messages, press <F5 Update>.

Each message displayed on the ECON screen has an associated severity level. Severity levels range from zero to nine, with nine being the most serious.

<table>
<thead>
<tr>
<th>DE Number</th>
<th>Key</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0201</td>
<td></td>
<td>0</td>
<td>CHECK DISP CODE</td>
</tr>
<tr>
<td>0225</td>
<td></td>
<td>123456</td>
<td>SP BANK ACCT #</td>
</tr>
<tr>
<td>0226</td>
<td></td>
<td>C</td>
<td>SP CHECK/SAVE</td>
</tr>
<tr>
<td>0227</td>
<td></td>
<td>1</td>
<td>SP PRENTRY LED</td>
</tr>
<tr>
<td>0230</td>
<td></td>
<td>A18700</td>
<td>SP BANK KEY</td>
</tr>
</tbody>
</table>

00005  Final edit errors found

F: 1-Help  2-Cancel  3-Return  4-Print  5-Update
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<tbody>
<tr>
<td>0231</td>
<td>8</td>
<td>123456</td>
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</tr>
<tr>
<td>0225</td>
<td>0</td>
<td></td>
<td>37 BANK ACCT #</td>
</tr>
<tr>
<td>0226</td>
<td>0</td>
<td></td>
<td>37 CHECK/SAV</td>
</tr>
<tr>
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U0005 Final edit errors found

F: 1-Help 2-Cancel 3-Return 4-Print 5-Update