CASUAL TO CAREER

General Procedures

The procedures described in this section are for changing an employee from casual employee status to career employee status.

Data regarding the employee's status is entered into the system, via the CASU screen bundle, in the order below:

1. Miscellaneous personnel information (EPER screen).
2. Appointments, title, and distribution information (EAPP screen).

Reminder: Use <F1 Help> for assistance in entering data.

To Begin ...

1. Access the Function Code Menu (BUND).
2. At next func, type CASU to select Casual to Career.
3. Type the ID number, name or social security number of the employee and press <Enter>.

The current employee data is displayed on the EPER screen.
EPER (Personnel-Miscellaneous)

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.

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 of the employee's relationship to the University. Information such as Probationary Period, Salary Review Date, and Home Department is updated at this screen.
- After completing all the required data entry fields on this screen, press <F1 Next Func> to continue to the next screen.
EPER (Personnel-Miscellaneous)

Data Element Definitions
(required data elements are highlighted)

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 the probationary period, in the format: mm/dd/yy.

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

Next Salary Review Type:
Staff only. Code indicating the type of salary increase the employee will be eligible for at review time. Press <F1 Help> to see valid codes.

Notes and Tips
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.
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.

Actions:
On the new appointment line, enter the appropriate personnel action code to select Casual to Career.

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 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.

Notes and Tips
1. This screen indicates the current appointments and distributions associated with the employee record.
2. When processing a casual to career change, always end the current appointment and distribution. See Appointment and Distribution Line Changes at the beginning of this section for procedures.
### EAPP (Appts/Distributions)

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

#### Appt Begin:
Date on which the employee's appointment is effective, in the format: mmddyy.

#### Appt End:
Date on which the appointment is expected to end, in the format: mmddyy. If indefinite or tenured, enter 999999.

#### 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 A&PS 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.

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**Notes and Tips**
- In addition to ending the current appointment and distribution, if the employee is funded Sub 1:
  1. Tab to the Appointment Dur field.
  2. Type: *.
  3. Tab to the Distribution FTE field.
  4. Type: *.
## EAPP (Appts/Distributions)

<table>
<thead>
<tr>
<th>Action</th>
<th>Type</th>
<th>Begin</th>
<th>End</th>
<th>Dist</th>
<th>Fund</th>
<th>Pay Begin</th>
<th>Pay End</th>
<th>Step</th>
<th>Rate</th>
<th>Amount</th>
<th>DOS</th>
<th>PRQ</th>
<th>DUC</th>
<th>WSP</th>
<th>FTE</th>
<th>Dis %</th>
</tr>
</thead>
<tbody>
<tr>
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<td>0.4900</td>
<td>0.4900</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Data Element Definitions

*(required data elements are highlighted)*

**F/V:**

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

**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.

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**Notes and Tips**
EAPP (Appts/Distributions)

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

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

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

**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. If indefinite, enter 999999.

**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 associated with the title code of the appointment. Press <Fl Help> to see valid codes.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

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.

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
Update the Employee Database (EDB)

1. Ensure you have completed all the required data elements in the bundle.
2. Press <F5 Update> to add 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 casual to career 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 main menu.
4. If the update is not successful, there are consistency edit problems with the data you entered and the
   Consistency Edit (ECON) 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 Next Msg> 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.
Correcting Error Messages (IMSG)

After updating the bundle, you may request to see any other system messages related employee record that you have just entered/updated. Enter IMSG in the "Next Func", then enter the employee ID, name, or social security number and press <Enter>. The system will display other messages you may want to review and /or correct. To correct, you will need to go to the appropriate function, make the correction, and go through the update process again.