APPOINTMENT LEVEL CHANGES
PROMOTION/DEMOTION/RECLASSIFICATION OR LATERAL TRANSFER - STAFF

General Procedures

The procedures described in this section are for promotion/demotion/reclassification or lateral transfer of staff employees.

Definitions:

Promotion - a transfer from one position to another position, which has a title code with a higher maximum salary.

Demotion - a transfer from the employee's current position to another position that has a title code with a lower maximum salary.

Reclassification - an employee's current position was reviewed and, as a result, the job title code changed.

Lateral transfer - a change of an employee from one position to another position which is in a class having the same salary range maximum.

Data regarding the employee's promotion/demotion/reclassification or lateral transfer is entered into the system via the SPRO screen bundle, in the order below:

1. Appointments, title, and distribution information (EAPP screen).
2. Miscellaneous personnel information (EPER screen).
3. Employee Personal Data (EPDI screen).

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

1. Access the Function Code Menu (BUND).

2. At the next func line, type SPFO to select Staff Promote/Transfer/Demote/Reclass.

3. Type the ID number, name, or social security number of the employee being promoted and press <Enter>. The EAPP - Appointment/Distribution screen is displayed with the current employee data.

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 mn" (i.e., mn = 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 EAFF screen with the new appointment line.
4. Enter data in the required fields on the EAFF 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 appropriate personnel action code for the action you are entering, i.e. promotion, reclassification, etc.

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.

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

Notes and Tips
• This screen indicates the current appointments and distributions associated with the employee record.

• When processing a promotion, always end the current appointment and distribution and set up a new appointment and distribution. See Appointment and Distribution Line Changes at the beginning of this section.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

Appt End:
Date on which the appointment is expected to end, in the format: mm/dd/yy. If indefinite, enter 999999.

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

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.

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

Notes and Tips
## 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.

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

### L/Art/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**

- The Annual/Hourly Rate field is system-derived on the appointment line after the employee record is updated.

---

### Table: Data Element Definitions

<table>
<thead>
<tr>
<th>Data Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>rt</td>
<td>Code indicating whether the rate of pay is hourly, annual, or by agreement.</td>
</tr>
<tr>
<td>Sch</td>
<td>Code indicating the pay schedule on which the appointment will be paid, either hourly or monthly.</td>
</tr>
<tr>
<td>Time</td>
<td>Code indicating the method for reporting time worked in the appointment.</td>
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<tr>
<td>lv</td>
<td>Code indicating the rate at which vacation and sick leave will be accrued.</td>
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<tr>
<td>Dist No</td>
<td>Number uniquely identifying the payroll distribution associated with the appointment.</td>
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<tr>
<td>L/Art/Fund/Sub</td>
<td>Code indicating the full accounting unit to which pay will be charged for this appointment.</td>
</tr>
<tr>
<td>FTE</td>
<td>If applicable. The percentage of the budgeted position which the distribution represents.</td>
</tr>
</tbody>
</table>
PAYROLL/PERSONNEL ONLINE SYSTEM
PROCEDURES

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: mmdyy

Pay End:
Date on which pay is expected to end for the account/fund, in the format: mmdyy. 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 <F1 Help> to see valid codes.

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

Notes and Tips
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

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.

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
Data Element Definitions
(required data elements are highlighted)

Employee Relations Code:
Code indicating the employee designation/status for the purpose of collective bargaining. If applicable, to be changed when an employee is moving from one collective bargaining unit to another. Press <F1 Help> to see valid codes.

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

Next Salary Review Date:
Staff only. Projected 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 for at review time. Press <F1 Help> to see valid codes.

Home Department:
Staff only - if applicable. Two-digit home department code. 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.
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.

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

Notes and Tips
- Only change those fields that need to be
updated. Press <F1 Next Func> to continue
to the next screen.
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.
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: UPDATE PROCESS COMPLETE
   You are returned to the first screen in the bundle so you can begin another promotion 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.

```
03/10/95 16:38:23 Consistency Edit
ID: 999999950 Name: RESOURCES, HERMAN
559: 999-99-9900 Perl Pay: MA

Consistency Edit Number 108
Msg # Severity Message Text
001420 Empl Rej INVALID ATTEMPT TO EXPLICITLY SET CHECK DISPO TO 0

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<th>Value</th>
<th>Description</th>
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<td>123455</td>
<td></td>
<td>SP BANK ACCT #</td>
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<tr>
<td>0226</td>
<td>C</td>
<td></td>
<td>SP CHECK/SAVE</td>
</tr>
<tr>
<td>0227</td>
<td>1</td>
<td></td>
<td>SP PROMOTE LED</td>
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<tr>
<td>0230</td>
<td>A1070</td>
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<td>SP BANK KEY</td>
</tr>
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</table>

00005 Final edit errors found

1- Help  2-Cancel  3-Return  4-Print  5-Update
```
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.
ACADEMIC PROMOTION/CHANGE ACADEMIC SERIES

General Procedure

The procedures described in this section are for Academic employees only. The procedures cover promotion or transfer from the existing appointment to an appointment in a different academic series.

Promotion can be defined as advancement from one title (rank) to a higher title (rank) within the same academic series. This action is normally accompanied by an increase in salary.

For example, the academic series would need to be changed by transferring from the existing appointment to another appointment in the following situations:

- change from Professional Research to Professional.
- change from Acting Assistant Professor to Assistant Professor (regularization)
- change from Adjunct Professor series to Professional Research series

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

1. Appointments, title, and distribution information (EAPP screen).
2. Miscellaneous personnel information (EPER screen).
3. Academic Service (EACD screen).
4. Employee personal data (EPD1 screen).

Reminder: Use «F1 Help» for assistance in entering data.

To Begin...
To Begin ...

1. Access the Function Code Menu (BUND).

2. At the next func line, type APRO to select Academic Promotion/Change Academic Series.

3. Type the ID number, name, or social security number of the employee and press <Enter>. The EAPP Appointments/Distributions screen is displayed with the current employee data.

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)

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**Notes and Tips**

- This screen indicates the current appointments and distributions associated with the employee record.
- When processing a change of series for an academic employee, always end the current appointment and distribution and set up a new appointment and distribution. See Appointment and Distribution Line Changes at the beginning of this section.

**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 personnel action code 14 for Employment in Different Academic Series.

**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.

**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, enter 9999999.
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.

**Title:**
Code indicating the classification title. 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.

**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.

Notes and Tips

- In addition to ending the current appointment and distribution, if the employee is funded
  Sub 0:
  1. Tab to the Appointment Dur field.
  2. Type: *.
  3. Tab to the Distribution FTE field.
  4. Type: *.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

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

Lv:
If applicable, code indicating the rate at which vacation and sick leave will be accrued. Press <F1 Help> to see valid codes.

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.

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.

Notes and Tips
• The Annual/Hourly Rate field is system-derived on the appointment line after the employee record is updated.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

PayEnd:
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 <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.

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. Not used at UCR.
### EAPP (Appts/Distributions)

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

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

Employee Relations Code:
Code indicating the employee designation/status for the purpose of collective bargaining. If applicable, to be changed when an employee is moving from one collective bargaining unit to another. Press <F1 Help> to see valid codes.

Home Department:
If applicable. Two-digit home department code. 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 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.
EACD (Academic Service)

Data Element Definitions
(required data elements are highlighted)

Quarters/Semesters/Months in 8-Year Rule:
The number of units currently applied to the 8-year rule, including this appointment. (There is a service limit of 8 years or 24 quarters for all appointments.) e.g. Assistant Professor, for new appointments, enter 06.

Extension to 8-Year Rule:
The number of units that were added to extend the 8-year rule for this appointment.

Quarters/Semesters/Months on 19900 Funds At Greater Than 50 Percent:
The number of units that are more than 50% supported by General Funds. For new appointments, enter 01.

Quarters/Semesters in Unit 18 Titles:
The number of units currently applied to the Unit 18 rule. (There is a service limit of 6 years or 18 quarters for lecturers under all appointments.) If this is the first quarter of appointment to this title, enter 01. If the appointment is for the full academic year, enter 03.

Quarters/Semesters as Teaching Assistant:
The number of units spent as a teaching assistant under this appointment.

Notes and Tips

• When you are doing an Academic action, complete all the required data entry fields on this screen, then press <F11 Next Func> to continue.

• This screen allows entry and update of information related to the employee’s academic service, such as the number of quarters/semesters spent as a teaching assistant, and extension to the 8-year rule.

UCR - ACADEMIC PROMOTION/CHANGE
ACADEMIC SERIES
Rev: 1.0
**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.
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.
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 transferring employment in a different academic series 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 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.
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.
CHANGE IN PERCENT TIME
CHANGE IN PERCENTAGE OF FULL TIME

General Procedure

The procedures described in this section are for changing the percent of full time the employee will be working, for the current appointment and/or distribution. Personnel action codes for change of percent full time on the existing appointment and/or distribution lines are system-derived.

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

To Begin...

1. Access the Function Code Menu (EEDB).

2. At the next func line, type EAPP to select Appt/Distributions screen.

3. Type the ID number, name, or social security number of the employee and press <Enter>. The BPER- Personnel/Miscellaneous screen displays the current employee data.

4. If applicable, at the next func line, type EPER to update BELI information.
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.

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 the appointment is indefinite, enter 999999.

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

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

Notes and Tips
- This screen indicates the current appointments and distributions associated with the employee record.
- When processing a miscellaneous pay rate change, always end the current distribution and set up a new distribution. See Appointment and Distribution Line Changes at the beginning of this section.
EAPP (Appts/Distributions)

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<th>ED Entry/Update</th>
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<td>Usersis PERSONE</td>
</tr>
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<td>ID: 999999998</td>
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<td>SNS: 999-99-9999</td>
</tr>
<tr>
<td>PAI Gen No:</td>
<td>1</td>
<td>Pg 01 of 01</td>
</tr>
<tr>
<td>Appt</td>
<td>Actions</td>
<td>Pay Typ Res Vd Out</td>
</tr>
<tr>
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<td>5 J</td>
<td>070195</td>
</tr>
<tr>
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</tr>
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<tr>
<td>Dist</td>
<td>Actions</td>
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</tr>
<tr>
<td>1I</td>
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</tr>
<tr>
<td>Pay Beg</td>
<td>Pay End</td>
<td>Step O/A Rate/Amount</td>
</tr>
<tr>
<td>070195</td>
<td>090905</td>
<td>1.0</td>
</tr>
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<td>L Acct CC Fund FC</td>
</tr>
<tr>
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<td>Pay End</td>
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</tr>
<tr>
<td>070195</td>
<td>090905</td>
<td>1.0</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.

**LV:**
- Code indicating the rate at which vacation and sick leave will be accrued. Press <F1 Help> to see valid codes.

**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:**
- The percentage of the budgeted position which the distribution represents.

**Dist %:**
- The anticipated percentage of time which is charged 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 the pay is expected to end for the account/fund, in the format: mmddyy. If indefinite, enter 999999.

---

**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: *

- The Annual/ Hourly Rate field is system-derived on the appointment line after the employee record is updated.
Data Element Definitions
(required data elements are highlighted)

Assigned BELT:
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.

Notes and Tips
- 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
Update the Employee Database (EDB)

1. Make sure 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 start another change in percentage of full time 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.

---

**Table:**

<table>
<thead>
<tr>
<th>DE Number</th>
<th>Key</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0201</td>
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<td>0</td>
<td>Description</td>
</tr>
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</tr>
<tr>
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<td>Description</td>
</tr>
<tr>
<td>0230</td>
<td></td>
<td>A1234</td>
<td>Description</td>
</tr>
</tbody>
</table>

**Message:**

00005 Final edit errors found

---

**Keys:**

1 - Help  2 - Cancel  3 - Return  4 - Print  5 - Update
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.
FUNDING CHANGE

General Procedure

The procedures described in this section are for changing an account, fund, or sub number, related to the employee's salary distribution.

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

To Begin...

1. Access the Function Code Menu (BUND).

2. At the next func line, type EAPP to select the EAPP-Appts/Distributions screen.

3. Type the ID number, name or social security number of the employee and press <Enter>. The EAPP screen displays the current employee data.
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 Functions
(required data elements are highlighted)

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

**Action:**
On the new distribution line, enter personnel action code 18 for Funding Change.

**L/Acct/Fund/Sub:**
Code indicating the full accounting unit to which pay will be charged for this appointment if the funding change is for a future pay period.

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

**Dist %:**
If applicable. 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: mmdy.

**Pay End:**
Date on which pay is expected to end for the account/fund, in the format: mmdy. If indefinite, enter 999999.

Notes and Tips

- This screen indicates the current appointments and distributions associated with the employee record.

- When processing a funding change, always end the current distribution and set up a new distribution. See Appointment and Distribution Line Changes at the beginning of this section.
EAPP (Appts/Distributions)

Data Element Functions
(required data elements are highlighted)

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 <F1 Help> to see valid codes.

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

DOS:
Code indicating the type of compensation associated with the distribution. 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 on the screen.
2. Press <F5 Update> to add this employee record in the EDB.
3. If the update is successful, the EAPP screen is displayed, with the following message: U0007 Update process complete
   You are returned to the EAPP screen so you can begin another funding change 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.

```
<table>
<thead>
<tr>
<th>DE Number</th>
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<th>Value</th>
</tr>
</thead>
<tbody>
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<tr>
<td>0225</td>
<td>C</td>
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<td>I</td>
<td></td>
</tr>
<tr>
<td>0230</td>
<td>A1870</td>
<td></td>
</tr>
</tbody>
</table>
```

U0005 Final edit errors found
=>
F: 1-Get 2-Cancel 3-Return 4-Print 5-Update
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.
General Procedure

Prior to initiating any of the following actions, reference the appropriate academic or staff personnel program policies or related labor contracts.

The procedure described in this section covers assigning a six month/merit/exceptional/equity increase to an employee.

Data regarding the employee's six month/merit/exceptional/equity increase is entered into the system, via the SMRT screen bundle, in the order below:

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

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

To Begin ...

1. Access the General Action Menu (BUND).
2. At the next func line, type SMRT to select Staff Merit/Six Month Increase screen bundle.
3. Type the ID number, name or social security number of the employee and press <Enter>. The EAPP-Appointments/Distributions screen displays the current employee data.
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.
EPER (Personnel-Miscellaneous)

Data Element Definitions
(required data elements are highlighted)

Next Salary Review Date:
If applicable. Projected date on which the employee will be considered for a salary review, in the format: mm/dd/yy

Next Salary Review Type:
If applicable. Code indicating the type of salary increase the employee will be eligible at review time. 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.
- After completing all the required data entry fields on this screen, press <F11 Next Func> to continue to the next screen.
## EAPP (Appts/Distributions)

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Appt:</strong></td>
<td>Number that uniquely identifies an appointment and associated data.</td>
</tr>
<tr>
<td><strong>Dist No:</strong></td>
<td>Number uniquely identifying the payroll distribution associated with the appointment. End the current distribution (see Notes and Tips for procedure).</td>
</tr>
<tr>
<td><strong>Actions:</strong></td>
<td>On the new distribution line, enter appropriate personnel action code.</td>
</tr>
<tr>
<td><strong>L/Act/Fund/Sub:</strong></td>
<td>Code indicating the full accounting unit to which pay will be charged for this appointment. Press &lt;F1 Help&gt; to see valid codes.</td>
</tr>
<tr>
<td><strong>FTE:</strong></td>
<td>The percentage of the budgeted position which the distribution represents.</td>
</tr>
<tr>
<td><strong>Dist %:</strong></td>
<td>The anticipated percentage of time which is chargeable to the account/fund.</td>
</tr>
<tr>
<td><strong>Pay Beg:</strong></td>
<td>Date on which the pay should be charged to the account/fund, in the format: mmdyy.</td>
</tr>
</tbody>
</table>

### Notes and Tips
- This screen indicates the current appointments and distributions associated with the employee record.
- When processing a pay rate change, always end the current distribution and set up a new distribution. See Appointment and Distribution Line Changes at the beginning of this section.
- The Annual/Hourly Rate field is system-derived on the appointment line after the employee record is updated.
## EAPP (Appts/Distributions)

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

### Pay End:
Date on which pay is expected to end for the account/fund, in the format: mm/dd/yyyy. 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 <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.
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 six month/merit/exceptional/equity increase 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 <F5 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.

<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>SF BANK ACCT #</td>
</tr>
<tr>
<td>0226</td>
<td></td>
<td>C</td>
<td>SF CHECK/SAVE</td>
</tr>
<tr>
<td>0227</td>
<td></td>
<td>1</td>
<td>SF PREVIOUS END</td>
</tr>
<tr>
<td>0230</td>
<td></td>
<td>A1870</td>
<td>SF BANK MIX</td>
</tr>
</tbody>
</table>

Final edit errors found

Fr: 1-Help 2-Cancel 3-Return 4-Print 5-Update
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.
CASUAL AND STUDENT INCREASES - STAFF

General Procedure

The procedures described in this section are for assigning a salary increase to an employee who is a student or a casual status employee.

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

To Begin ...

1. At the next func line, type EAPP to select the EAPP-Appts/Distributions screen.

3. Type the ID number, name, or social security number of the employee and press <Enter>. The EAPP screen displays the current employee data.
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.

Dist No:
Number uniquely identifying the payroll distribution associated with the appointment. End the current distribution (see Notes and Tips for procedure).

Actions:
On the new distribution line, enter appropriate personnel action code for Casual or Student Increase.

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.

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: mm/dd/yy.

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

Notes and Tips
- This screen indicates the current appointments and distributions associated with the employee record.

- When processing a casual/student increase, always end the current distribution and set up a new distribution. See Appointment and Distribution Line Changes at the beginning of this section.

- The Annual/Hourly Rate field is system-derived on the appointment line after the employee record is updated.
EAPP (Appts/Distributions)

Data Element Definitions
(required data elements are highlighted)

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 <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.

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 on the screen.
2. Press <F5 Update> to add this employee record in the EDB.
3. If the update is successful, the EAPP screen is displayed, with the following message: **U0007 Update process complete**
   You are returned to the EAPP screen so you can begin another casual and student salary increase 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.

---

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<thead>
<tr>
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<td>0201</td>
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<td>0225</td>
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<td>123456</td>
<td>SF BLANK ACCT #</td>
</tr>
<tr>
<td>0226</td>
<td></td>
<td>0</td>
<td>SF CHECK/SAVE</td>
</tr>
<tr>
<td>0227</td>
<td></td>
<td>1</td>
<td>SF PREMUT END</td>
</tr>
<tr>
<td>0230</td>
<td></td>
<td>A1870</td>
<td>SF BANK KEY</td>
</tr>
</tbody>
</table>

UD0005 Final edit errors found

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