TABLE OF CONTENTS

SECTIONS

Appointment Begin and End Dates	Date on which appointment is effective and the expected ending date in MMDDYY format.
Duration	Indicates the duration of the position. Casual appointments have no duration code entered. Duration codes are: • Indefinite (I) • Tenured (T) • For Budgetary Purposes Only (B)
Department	A system derived code indicating the department or other administrative unit associated with the appointment.
Title Code	This is the official University four-digit code for the position.
Grade	Appropriate salary grade for the position.
Percent of Full-Time	Indicates the percentage of full time that the employee is expected to devote to this appointment. 100% of full time is entered as 1.00.
Fixed or Variable	Indicates whether the appointment percentage of time worked is established as fixed or variable.
Annual/ Hourly Rate	The full time rate of pay (annual, hourly, or by-agreement amount) associated with the appointment.
Rate	A code indicating whether the pay is Annual, Hourly, or By-Agreement.

Pay Schedule	Indicates pay schedule on which the appointment is paid. MO -- Monthly current MA -- Monthly arrears
Time-Code	Code indicating the method for reporting time worked in an appointment. • A -- Positive by account/fund • T -- Exception by account/fund • N -- Positive - time sheet not required
Leave Accrual Code	Leave accrual rate for sick leave and vacation leave. Reference the appropriate personnel policy or collective bargaining agreement for specific leave accrual guidance.

4 UNIVERSAL ACTIONS

SECTION CONTENTS

4.9 RETIREMENT & FICA DERIVATION

Overview

This section describes the PPS derivation process for Retirement and FICA codes.

Background

PPS automatically derives Retirement and FICA codes for all employees. *(see System Derivation of Retirement/FICA codes, p. 4.9—4.)*

It is the Service Center's responsibility for determining that Retirement and FICA codes are correct for employees.

Service Centers should contact the Payroll Office with any questions or concerns on the derivation process. It is important that the Payroll Office be informed when the system derives Retirement/FICA codes other than what was intended, or when the Service Center is unclear what Retirement/FICA codes will derive. This is necessary in order to compute and maintain correct pay.

Central Offices should be the ONLY units to explicitly enter Retirement, FICA, and Derivation Codes.

The Retirement and FICA Codes can be viewed on the Inquiry Function, IGEN (General Information).

Retirement Codes:

N	Not eligible for retirement system membership
U	Eligible and participating in the UCRS retirement system
H	Participating in the Safe Harbor retirement system
B	Eligible but not participating in the UCRS retirement system (not currently in use)

University Of California Retirement System Membership

A non-student employee, appointed 50% or more, for one year or more, is mandatorily eligible for UCRS retirement system membership.

"One year or more" can be determined three ways:

1. By the appointment Begin and End Dates.

2. An appointment End Date of 99/99/99 (Indefinite or Tenured).

3. An appointment End Date that is identified "For Budgetary Purposes Only" (Budget)

FICA Codes:

N	Not eligible to participate in FICA
E	Participating in FICA (OASDI and Medicare)
M	Participating in the Medicare portion of FICA only (not participating in OASDI)

FICA Exemption

Employees **EXEMPT** from OASDI/Medicare are:

1. UC students employed at UC with minimum course load requirement:

   - Undergraduates: 6.0 units
   - Graduates: 5.0 units

2. Non-resident aliens with F1 & J1 visas

Derivation Indicators

A "derivation indicator" is a data element that indicates whether the Retirement System Code and FICA Eligibility Code should be automatically derived by the system, and also what rules PPS should use for derivation.

The Retirement/FICA Derivation Indicator can be viewed on the History function HPER (Personal Data History).

Derivation Indicators:	
N	Do NOT derive Retirement and FICA codes
Y	Derive Retirement and FICA codes
L	Derive Retirement and FICA codes using special derivation rules for UCRP members who, in 1976, made a lifetime election not to be coordinated with FICA
1,2,3	Indicator that derivation is pending for a rehire

Derivation For New Hires And Rehires

PPS will evaluate all eligible appointments from the date of hire to determine whether the employee has the adequate percentage and duration of time to qualify for UCRP.

Derivation For Student Employees

PPS will automatically derive Retirement and FICA codes for students based on number of units.

Contact the Career Center with questions or concerns on the Student FICA derivation process.

System Derivation of Retirement / FICA Codes

START HERE

Is Employee A Registered Student?

No → Is Employee Appointed 50% or More for A Year or More?

Yes → Is employee enrolled in minimum number of units?
- Undergraduates: 6.0 units
- Graduates 5.0 units

Is Employee Appointed 50% or More for A Year or More?
- Yes → Is Employee Appointed As A Visiting Academic?
- No → Is Employee A Non-Resident Alien With an F-1 or J-1 Visa?

Is Employee Appointed As A Visiting Academic?
- Yes → Is Employee A Non-Resident Alien With an F-1 or J-1 Visa?
- No → Is Employee Appointed Into A Safety Title? *

Is Employee A Non-Resident Alien With an F-1 or J-1 Visa?
- Yes → **N / N**
- No → **H / M**

Is employee enrolled in minimum number of units?
- No → **H / M**
- Yes → **N / N**

Is Employee Appointed Into A Safety Title? *
- No → Is Employee A Non-Resident Alien With an F-1 or J-1 Visa?
- Yes → Is Employee A Non-Resident Alien With an F-1 or J-1 Visa?

Is Employee A Non-Resident Alien With an F-1 or J-1 Visa?
- No → **U / E**
- Yes → **U / N**

Is Employee A Non-Resident Alien With an F-1 or J-1 Visa?
- Yes → **U / N**
- No → **U / M**

See Safety Titles, p. 4.9-5

Safety Titles

Title Code	Translation
0478	Chief of Police
0479	Asst Chief of Police/Police Captain
5312	Police Lieutenant
5313	Police Sergeant
5323	Police Officer
0797	Fire Chief
9803	Fire Captain
9805	Fire Fighter
9804	Fire Specialist

4.14 BUDGETARY END DATES

Overview

This section addresses appointments with budgetary end dates with respect to retirement eligibility and benefits eligibility.

Background

Budgetary end dates refer to appointments that are career, but have end dates for budgetary purposes only (FBPO). Examples of FBPO appointments are:

- continued employment is dependent upon availability of funds

- academic appointments **NOT** considered contractual, but should be coordinated with retirement/FICA and eligible for career benefits

The budgetary end date code allows for automatic derivation of retirement, FICA and BELI codes.

The appointment that is designated FBPO must be 50% or greater.

Duration of Appointment Code

B   Indefinite, with an appointment end date for budgetary purposes only (FBPO)

Coded at the appointment level in the duration field. Literal translation BUDGET appears on the IAPT or IAPP function when B is coded.

THE IAPP (APPOINTMENT/DISTRIBUTIONS) FUNCTION

Data Entry

Enter the **B** duration of appointment code via the **EAPP** function.

Completing the EAPP function

THE EAPP (APPOINTMENT/DISTRIBUTIONS) FUNCTION
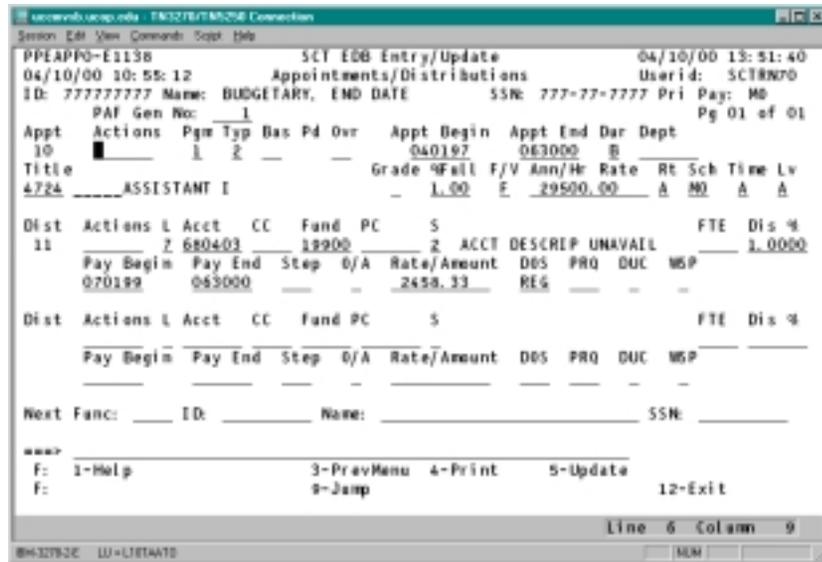
EAPP Procedure

Enter data in the following fields as appropriate.

Dur   If appointment is for budgetary purposes only, enter **B**.

Notes and Tips

B code criteria:

- Student status of non-student

- Employment status of Active (**A**) or On Leave (**N**, **P**)

- Appointment is 50% or more

When **B** is **not** appropriate:

- Appointments that have specific end dates that are NOT career. Should have a blank duration field.

- Appointments less than 50%

- Indefinite and Tenure appointments (end date 999999). Should be coded I and T respectively.

- Contractual Academic appointments

Appointment Level Procedure

1. End current casual appointment and distribution(s) effective the day before the career action is effective.

2. **F9 Jump** to the command line and type **"add a"** to set up the first available appointment. Press **Enter**.

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

Actions (Action Code)	Enter Personnel Action Code 52. (Casual to Career)
PGM	Leave Blank. System Derived Code indicating the personnel program associated with the appointment
Typ	Enter the Code indicating the appointment type associated with the appointment.
Bas	For partial-year staff career employees. Enter the Code which indicates the number of months in a year the employee will work.
Pd Ovr	Leave Blank. Used in academics only.
Appt Begin	Enter the date on which the employee will be appointed to a career position in the format: MMDDYY.
Appt End	Enter the date on which the employee's career position is expected to end, in the format: MMDDYY. If the appointment is indefinite, enter **999999**.
Dur	If Appointment is indefinite, enter **I**. If Appointment is career, but has an ending date for budgetary purposes only, enter **B**. Otherwise, leave blank.

Title	Enter the title code resulting from the casual to career action.
Grade	If employee is appointed to a grade-based title, then enter the appropriate pay grade for the title.
%FULL	Enter the percentage of time that the employee is expected to work in the career appointment. Enter 100% as 1.00.
F/V	Enter the code representing whether the amount of time worked in the appointment is Fixed (**F**) or Variable (**V**).
Annual/Hr	Leave Blank. System will derive.
Rt	Enter the code that indicates whether the rate of pay is Annual (**A**), Hourly (**H**), or By-Agreement (**B**).
Sch	Enter the code that indicates which pay schedule the appointment will be paid, either Monthly Current (**MO**) or Monthly Arrears (**MA**).
Time	Enter the code that represents the method of reporting time for the appointment. Enter (**T**) for Exception Time Reporting or Enter (**A**) for Positive Time Reporting.
Lv	Enter the appropriate leave accrual code for vacation and sick leave accrual rates.

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

Completing the EAPP function

THE EAPP (APPOINTMENT/DISTRIBUTIONS) FUNCTION

```
┌──────────────────────────────────────────────────────────┐
│ ▬      TN3270 - uccmvsb to host uccmvsb.ucop.edu    ▼ ▲ │
├──────────────────────────────────────────────────────────┤
│ Session  Edit  Commands   Settings    Help               │
├──────────────────────────────────────────────────────────┤
│ PPEAPP0■E1093          SCT EDB Entry/Update    CASU 07/03/97 08:56:05 │
│ 11/20/96 00:16:06     Appointments/Distributions   Userid: SCPPSLAH │
│ ID: 670000400 Name: CAREER, IMMA DEMO    SSN: 670-00-0400 Pri Pay: MA │
│     PAF Gen No:   2                              Pg 02 of 02 │
│ Appt  Actions Pgm Typ Bas Pd Ovr  Appt Begin Appt End Dur Dept │
│  20       _    3   _       072595    123195   _  001779 │
│ Title                    Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv │
│ 5063 STORES WORKER         _  0.40  U _____  H  MA   A   A │
│                                                          │
│ Dist  Actions L Acct   CC   Fund  PC    S           FTE  Dis % │
│  21       7 403165    19900 NASTTM 2 NS/SUP SERV/SCI STOCKRO ___  0.4000 │
│     Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP │
│     072595    123195   1.0   _    10.9100      REG   __   _   _ │
│                                                          │
│ Dist  Actions L Acct   CC   Fund  PC    S           FTE  Dis % │
│                                                          │
│     Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP │
│     ___                                                  │
│                                                          │
│ Next Func: ____  ID: _____  Name: _____ SSN: _____ │
│ U0001  Input accepted                                    │
│ ===>                                                     │
│ F:  1-Help     2-Cancel          4-Print    5-Update     │
│ F:  7-Backward         9-Jump             11-NextFunc    │
├──────────────────────────────────────────────────────────┤
│                                    IBM-3278-2-E 09:01:37 │
└──────────────────────────────────────────────────────────┘
```

EAPP Notes and Tips

- When processing a career to casual action, many data elements reflecting conditions of employment will change for an employee.

- It may be advisable to use the **"add"** command for appointments and distributions to assure greater accuracy.

Appointment Level Procedure

1. End the current career appointment.

2. Enter an asterisk (*****) to delete data in **DUR** field.

3. End the current career distribution(s).

4. **F9 Jump** to the command line and type **"add a"** to set up the first available appointment. Press **Enter**.

5. Enter data in the following fields, as applicable.

Actions (Action Code)	Leave Blank. There is no action code for a Career to Casual action.
PGM	Leave Blank. This is a system derived code which indicates the personnel program associated with the appointment.
Typ	Enter 3, which denotes casual appointment. Type code indicates the appointment type associated with the appointment.
BAS	Leave Blank.
Pd Ovr	Leave Blank.
Appt Begin	Enter the date on which the employee will be appointed to a casual position in the format: MMDDYY.
Appt End	Enter the date on which the employee's casual position is expected to end, in the format: MMDDYY.
Dur	Leave Blank.
Title	Enter the title code.

Permanent Change in Percent of Time

Completing the EAPP Function

THE EAPP (APPOINTMENTS & DISTRIBUTIONS) FUNCTION

Appointment Level Procedure

1. End the current appointment and distributions effective the day before the permanent action if effective.

2. If current appointment was indefinite, then delete the "I" in the duration field by entering a * in this field.

3. **F9 Jump** to the command line and set up the next available appointment using **"add a"** or **"copy xx to xx"** command.

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

Actions (Action Code)	Leave Blank. Personnel Action Code for change in percent of time is system derived.

PGM	Leave Blank. System derived.
Typ	Enter the code indicating the appointment type associated with the appointment.
Bas	For partial-year employees only. Enter the code that indicates the number of months in the year that the employee will work.
Pd Ovr	Leave blank.
Appt Begin	Enter the date on which the change is effective in the format: MMDDYY.
Appt End	If indefinite, enter 999999. Otherwise enter the date on which the appointment is expected to end in the format: MMDDYY.
Dur	If Appointment is indefinite, enter **I**. If Appointment is career, but has an ending date for budgetary purposes only, enter **B**. Otherwise, leave blank.
Title	Enter the title code.
Grade	If employee is appointed to a grade-based title, then enter the appropriate pay grade for the title.
% Full	Enter the percentage of time that the employee is expected to work in the appointment. Full-time (100%) is entered as 1.00.
F/V	Enter the appropriate code to indicate whether the percentage of time the employee will work in the appointment is: Fixed (**F**) or Variable (**V**).

RT	Enter the code that indicates whether the rate of pay is: Annual (**A**), Hourly (**H**), or By Agreement (**B**).
Annual	Leave Blank. System derived.
Sch	Enter a pay schedule code that will be consistent for all appointments. Valid codes are: Monthly Current (**MO**) or Monthly Arrears (**MA**).
Time	Enter the time code that represents the method of reporting time for the appointment. Enter (**T**)for Exception Time Reporting or Enter (**A**) for Positive time reporting.
LV	Enter the leave accrual code that indicates the rate at which vacation and sick leave will be accrued.

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

The Distribution Level Procedure

1. **F9 Jump** to the command line and use the **"copy xx to xx"** command to set up the next available distribution.

2. Enter data in the following fields as applicable.

Actions (Action Code)	Leave Blank. Personnel Action Code for Change in Percent of time is system derived.
L	Enter 7 for UCSC location number.
Acct	Enter 'organization' FOAPAL number.
CC	Leave blank; *not used at this time*

Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 1 or 2 as applicable.
FTE	Enter the percentage of the budgeted position which the distribution represents, if applicable. Full time FTE (100%) is entered as 1.00.
Dist %	Enter the anticipated time which is chargeable to the distribution accounting unit. 75% is entered as .7500.
Pay Beg	Enter the date on which the salary begins as a result of the change in percent of time in the format: MMDDYY.
Pay End	For indefinite distributions, enter 999999. Otherwise enter the date on which the pay is expected to end due to account/fund activity in the format: MMDDYY.
Step	If employee is appointed to step-based title code, then the appropriate step within the salary range associated with the title code. Steps are entered as 1.0, 1.5, 2.0, etc.
O/A	Leave Blank.
Rate/ Amount	Enter the monthly, hourly rate or by-agreement rate reflecting the salary for this action. If hourly, remember to use four decimal places, i.e., $10.00/hour is entered as 10.0000.
DOS	Enter REG for regular pay.
PRQ	Leave Blank.
DUC	Leave Blank.

Extending/Renewing an Appointment *and* Changing the Percent of Time

THE EAPP (APPOINTMENT/DISTRIBUTIONS) FUNCTION

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┌─────────────────────────────────────────────────────────┐
│  ─     TN3270 - uccmvsb to host uccmvsb.ucop.edu  ▼ ▲    │
├─────────────────────────────────────────────────────────┤
│ Session  Edit  Commands   Settings   Help               │
│ PPEAPP0■E1093        SCT EDB Entry/Update    SRNW 07/03/97 09:16:14 │
│ 11/20/96 00:16:45    Appointments/Distributions   Userid: SCPPSLAH │
│ ID: 670000996 Name: EXTENSION, ELIZA T    SSN: 670-00-0996 Pri Pay: MA │
│     PAF Gen No: ___2                           Pg 02 of 02 │
│ Appt  Actions Pgm Typ Bas Pd Ovr   Appt Begin  Appt End Dur Dept │
│  20    17___  _   3   _       060294    093095   _ 002406 │
│ Title                         Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv │
│ 4672 CLERK, SR/SECRETARY        _  1.00  U _____ A MO  I  A │
│                                                         │
│ Dist  Actions L Acct   CC   Fund  PC    S            FTE  Dis % │
│  21      7 660114 ____ 19900 ____ 2  HR/Payroll Personnel Sy ___ 1.0000 │
│    Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP │
│    060294    063095   _    _    1796.00  REG  _   _   _ │
│                                                         │
│ Dist  Actions L Acct   CC   Fund  PC    S            FTE  Dis % │
│    _____ ___ ____ ____ ____ _                          │
│    Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP │
│    _____    _____   _    _    _____   ___  _   _   _ │
│                                                         │
│ Next Func: ____ ID: _____ Name: _____ SSN: _____ │
│ U0001  Input accepted                                   │
│ ===>                                                    │
│  F:  1-Help    2-Cancel         4-Print    5-Update     │
│  F:  7-Backward          9-Jump            11-NextFunc   │
│                                    IBM-3278-2-E 09:23:37 │
└─────────────────────────────────────────────────────────┘
```

Appointment Level Procedure

1. End the current appointment and distribution(s) effective the day before the renewal is to be effective.

2. **F9 Jump** to the command line and set up the next available appointment using **"add a"** or **"copy xx to xx"** commands.

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

Actions (Action Code)	Enter Personnel Action Code 17. (Renewal of appointment)
PGM	Leave Blank. System derived.
Typ	Enter the code indicating the appointment type associated with the appointment.

Bas	For partial-year staff career employees. Enter the code which indicates the number of months in a year the employee will work.
Pd Ovr	Leave Blank.
Appt Begin	Enter the date on which the staff renewal action is effective in the format: MMDDYY.
Appt End	If indefinite, enter 999999. Otherwise, enter the date on which the appointment is expected to end in the format: MMDDYY.
Dur	If Appointment is indefinite, enter **I**. If Appointment is career, but has an ending date for budgetary purposes only, enter **B**. Otherwise, leave blank.
Title	Enter the title code.
Grade	If employee is appointed to a grade-based title, then enter the appropriate pay grade for the title.
%FULL	Enter the percentage of time that the employee is expected to work in the appointment. Full-time (100%) is entered as 1.00.
F/V	Enter the appropriate code to indicate whether the percentage of time the employee will work in the appointment is Fixed (**F**) or Variable (**V**).
Annual/Hr	Leave Blank. System derived.
Rt	Enter the code that indicates whether the rate of pay is: Annual (**A**), Hourly (**H**), or By Agreement (**B**).

THE EAPP (APPOINTMENT/DISTRIBUTIONS) FUNCTION

```
┌──────────────────────────────────────────────────────────────┐
│  TN3270 - uccmvsb to host uccmvsb.ucop.edu        ▼ ▲         │
├──────────────────────────────────────────────────────────────┤
│ Session  Edit  Commands  Settings  Help                       │
│ PPEAPP0-E1093        SCT EDB Entry/Update     SCLS 07/03/97 14:10:59 │
│ 12/20/96 14:06:08    Appointments/Distributions    Userid: SCPPSLAH │
│ ID: 010000700 Name: RECLASS, RITA R    SSN: 010-00-0700 Pri Pay: MO │
│       PAF Gen No: __4__                         Pg 04 of 04    │
│ Appt  Actions Pgm Typ Bas Pd Ovr  Appt Begin  Appt End Dur Dept │
│  20    38___   1   3   _  _    090196    999999   I  002287   │
│ Title                       Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv │
│ 4724 _____ASSISTANT I         _   1.00   F  24600.00   A  MO   I   A │
│                                                                │
│ Dist  Actions L Acct   CC   Fund  PC    S             FTE  Dis % │
│  21      7 614660    20300     1  UNEX/FACILITIES           1.0000 │
│     Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP │
│     090196    999999    1.0   _    2050.00      REG  __   _   _ │
│                                                                │
│ Dist  Actions L Acct   CC   Fund  PC    S             FTE  Dis % │
│     Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP │
│     _____    _____    ___   _    _____      ___  __   _   _ │
│                                                                │
│ Next Func: ____  ID: _____ Name: _____ SSN: _____ │
│ U0001  Input accepted                                          │
│ ===>                                                           │
│  F: 1-Help    2-Cancel           4-Print    5-Update          │
│  F: 7-Backward           9-Jump            11-NextFunc         │
│                                   IBM-3278-2-E  14:16:35       │
└──────────────────────────────────────────────────────────────┘
```

Appointment Level Procedure

1. End current appointment and distributions the day before the reclassification action is effective.

2. If current appointment is Indefinite, enter an asterisk (*****) in the Dur field to delete the I.

3. **F9 Jump** to the command line and use the **"copy xx to xx"** command to set up the next available appointment.

4. Enter data in the following fields, as applicable.

Actions (Action Code)	Enter the appropriate personnel action code associated with the reclassification.
PGM	Leave Blank. System derived personnel program type.
Typ	Enter the Code indicating the appointment type.

Bas	For partial-year staff career employees only. Enter the code which indicates the number of months in a year the employee will work.
Pd Ovr	Leave Blank.
Appt Begin	Enter the date on which the reclassification action is effective in the format: MMDDYY.
Appt End	Enter the date on which the appointment is expected to end in the format: MMDDYY. If indefinite, enter 999999.
Dur	If appointment is indefinite, enter **I**. If appointment is career, but has an ending date for budgetary purposes only, enter **B**. Otherwise, leave blank.
Title	Enter the title code resulting from the reclassification.
Grade	If the employee is appointed to a grade-based title, then enter the appropriate pay grade for the title.
%FULL	Enter the percentage of time that the employee is expected to work in the appointment. Full time (100%) is entered as 1.00.
F/V	Enter the code representing whether the amount of time worked in the appointment is Fixed (**F**) or Variable (**V**).
Annual	Leave Blank. System will the annual rate after the update has occurred.

Rt	Enter the code that indicates whether the rate of pay is Annual (**A**), Hourly (**H**), or By-agreement (**B**).
Sch	Enter the code that indicates which pay schedule the appointment will be paid, either Monthly Current (**MO**) or, Monthly Arrears (**MA**).
Time	Enter (**T**) for Exception Time Reporting or Enter (**A**) for Positive Time Reporting. This code represents the method or reporting time for the appointment.
Lv	Enter the leave accrual code that indicates the rate at which vacation and sick leave will be accrued.

5. Press **Enter** invoke range/value edits.

Distribution Level Procedures

1. **F9 Jump** to the command line and type **"add d"** or use the **"copy xx to xx"** command to set up the next available distribution and then press Enter.

2. Enter data in the following fields as applicable:

Actions (Action Code)	No required action code at the distribution level for a reclassification action.
L	Enter 7 for UCSC location number.
Acct	Enter 'organization' FOAPAL number.
CC	Leave blank; *not used at this time*
Fund	Enter fund number.
PC	Enter activity code (optional, not required).

Sub	Enter 1 or 2 as applicable.
FTE	Enter the percentage of the budgeted position which the distribution represents, if applicable. Full Time FTE (100%) is entered as 1.00.
Dist %	Enter the anticipated time which is chargeable to the distribution accounting unit resulting from the reclassification action. 100% is entered as 1.000.
Pay Beg	Enter the date on which the salary begins resulting from the reclassification action in the format: MMDDYY.
Pay End	For indefinite distributions, enter 999999. Otherwise enter the date on which the pay is expected to end in the format: MMDDYY.
Step	If employee is reclassified to a step-based title code, then enter the step within the salary range associated with the title code in the format: 1.0, 1.2, 2.0, 2.5, 3.0, 3.5, 4.0, 4.5, 5.0
O/A	Leave Blank.
Rate/Amount	Enter the monthly, hourly or by-agreement rate associated with the distribution after the reclassification.
DOS	Enter **REG** for regular pay. This is the description of payment.
PRQ	Leave Blank.
DUC	Leave Blank.
WSP	Leave Blank.

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

UCSC Data Collection Document
CASUAL TO CAREER -- (CASU)

Use this document for:
Changing a staff employee from casual to career status when a casual employee at 50% time or more holds the same position in the same unit for 13 consecutive months or more; OR a unit head designates a casual position as career. ***NOTE:*** *Casual to Career via open recruitment shall be processed by SHR employment.*

EMPLOYEE NAME: _____   ID # _____

EAPP - Appointments/Distributions

1) End appropriate casual appointment effective: _____
                                                    mm/dd/yy
2) End appropriate casual distribution line(s) effective: _____
                                                             mm/dd/yy
3) For units opting to use this document as a notification to the employee of the change in terms and conditions of employment, complete the new appointment and distribution information in this section, have the employee sign below, and provide them a copy, if requested.

NEW APPOINTMENT INFORMATION:

CAREER TITLE: _____   PERSONNEL PROGRAM: _____
         (Not entered--system derived)   *(Not entered--system derived)*

ACTION CODE: **(52)** Casual to Career   APPOINTMENT TYPE: **(2)**☐Career **(7)**☐Partial Year **(1)**☐Contract

BASIS: ___ *(Partial-Year Career Employees Only)*   APPT BEGIN DATE: _____   APPT END DATE: _____
                                                                       mm/dd/yy   mm/dd/yy

DUR: **(I)**☐ Indefinite **(B)** ☐ Career ☐ Other TITLE CODE: ____   GRADE: (if applicable)
              (Budgetary   **(Leave Blank)**
               end date)
% FULL TIME ____   **(F)**☐Fixed **(V)**☐Variable   ANNUAL/HOURLY RATE: _____
                                                                        (System will derive)

RATE: **(A)**☐Annual **(H)**☐Hourly   SCHEDULE: ☐**MO** ☐**MA**

TIME: **(A)**☐Positive **(T)**☐Exception   LEAVE CODE: ☐**A** ☐**B** ☐**C** ☐**D**

NEW DISTRIBUTION INFORMATION:

ACTION CODE(S), *if applicable*: _____

** For additional distribution lines, attach the *Additional Distribution DCD* to the back of this page.

Loc __ Account _____ Cost Center (CC) ____ Fund _____ Project/Activity_____ Sub
FTE ____ Dist. % _____ Pay Begin _____ Pay End _____ Step
O/A _____ Rate/Amt _____ DOS ___ PRQ _____ DUC _____ WSP

Loc __ Account _____ Cost Center (CC) ____ Fund _____ Project/Activity_____ Sub
FTE ____ Dist. % _____ Pay Begin _____ Pay End _____ Step
O/A _____ Rate/Amt _____ DOS ___ PRQ _____ DUC _____ WSP

Loc __ Account _____ Cost Center (CC) ____ Fund _____ Project/Activity_____ Sub
FTE ____ Dist. % _____ Pay Begin _____ Pay End _____ Step
O/A _____ Rate/Amt _____ DOS ___ PRQ _____ DUC _____ WSP

EPER - Personnel-Miscellaneous

*Complete a BELI form to change the **"Assigned BELI" (change to "1")**, the **"Effective Date"**, and any applicable **"Status Qualifiers"**.*

EMPLOYEE RELATIONS CODE: **(i.e., A-G)**: _   EMPLOYEE RELATIONS UNIT **(i.e., CX, 99, etc.)**: __

PROBATIONARY PERIOD END DATE: _____
                               mm/dd/yy

NEXT SALARY REVIEW DATE:_____   NEXT SALARY REVIEW TYPE: **2)**☐Merit **(3)**☐At maximum
                        mm/yy

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*The following information should be communicated to the employee and supervisor, but is **not** entered into the system.*

MID-POINT EVALUATION DUE: _____
mm/dd/yy

FINAL EVALUATION DUE: _____
mm/dd/yy

CASUAL CREDIT TOWARD MERIT INCREASE: ☐ Yes ☐ No

MONTHS CREDIT: from _____ to _____
mm/dd/yy   mm/dd/yy

EPD1 - Employee Personal Data 1

*Have the employee complete this section only if any of the following information **is changing**:*

CAMPUS ADDRESS: BLDG. _____ CAMPUS PHONE: 1)_____ 2) _____ E-MAIL: _____
(Not entered in system)

WHERE DO YOU WANT YOUR PAYCHECK SENT? (*This must be a campus address*): _____
(*To have your check direct-deposited to your bank account, request a Surepay form from your Personnel Rep.*)

To be completed by Personnel Rep if paycheck disposition is changing:
MAIL CODE: *000* _____   (*Enter as "Room" under Campus Address in system*)
NOTE: Payroll Office will enter all Surepay information into the system.

PRIVACY NOTIFICATION

STATE: The State of California Information Practices Act of 1977 (effective July 1, 1978) requires the University to provide the following information to individuals who are asked to supply information: The principal purpose for requesting the information on this form is for payment of earnings, and for miscellaneous payroll and personnel matters, such as, but not limited to, benefits administration and changes in title and pay status. University policy and State and Federal statutes authorize the maintenance of this information.

Furnishing all information requested on this form is mandatory - failure to provide such information will delay or may even prevent completion of the action for which the form is being filled out. Information furnished on this form may be used by various University departments for payroll and personnel administration, and will be transmitted to the State and Federal governments as required by law.

Individuals have the right to review their own records in accordance with University personnel policy and collective bargaining agreements. Information on applicable policies and agreements can be obtained from campus or Office of the President Staff and Academic Human Resources Offices and the campus Student Employment Services Office.

The officials responsible for maintaining the information contained on this form are: Staff and Academic Human Resources Managers at Campuses and the Office of the President, Student Employment Services Managers, Campus Department Managers, or Campus Accounting Officers.

I certify that the above terms and conditions of employment have been explained to me, that any personal data that I have provided on this form are correct, and that I have read and understand the privacy notification.

EMPLOYEE SIGNATURE _____   DATE _____

Distribution of Forms:
Data Collection Document - Retain in the employee's personnel file
BELI Form - Payroll Office
Evaluations - Original: Unit file
            - Copy: Staff Human Resources

NOTE: Proposed revisions to this form must be reviewed by PPS Project personnel prior to being implemented. Contact Jeffrey Lau (x5189).

jl, 5/5/00