6.8 C<small>AREER TO</small> L<small>IMITED</small>

Overview

These procedures apply to employees who were appointed to a career position through open recruitment and through open recruitment (or non-recruitment) accept a limited position. For employees hired into the position via non-recruitment, the service center will process the Career to Limited action. For employees who are career and appointed to a limited position through the recruitment selection, the action shall be processed by SHR Employment.

Policy Summary

An employee may accept an appointment in a temporary, *limited* position.

Once an employee has attained career status, they retain that status, even though they are moving to a temporary appointment. The appointment entered into PPS is essentially a career appointment with an end date for budgetary purposes only. Listed below are factors to consider when an employee's status changes from career to limited:

- Benefits eligibility-Benefits eligibility is based upon appointment type, duration and percent of time.

- Vacation and Sick Leave eligibility-Leave accrual eligibility is based upon appointment type, duration and percent of time.

- UCRP membership eligibility-The employee will retain their UCRP membership.

- Merit eligibility-Merit eligibility is based upon personnel program, appointment type, duration, and percent of time.

- Layoff rights-The employee retains all layoff rights.

- For issues related to the timing of this action, refer to *Section 2.3, Timing*.

It is advised that the unit/service center contact their SHR Analyst and the Benefits office to discuss any potential ramifications.

Before You Start

Prior to processing the OEU for the Career to Limited action, Refer to the *SHR Procedures Manual*. This will give you guidance to determine the delegations of authority and policy procedure.

Complete the Data Collection Document (LIMI).

Notify the employee of any changes to conditions of employment.

Complete the Benefits Eligibility Level Indicator (BELI) form.

Data Entry

You will use the **LIMI** bundle when processing a career to limited action. This bundle contains the following functions:

EAPP (Appointments /Distributions)

EPER (Personnel-Miscellaneous)

EADD (Employee Address)

EPD1 (Employee Personal Data 1)

Accessing the LIMI Bundle

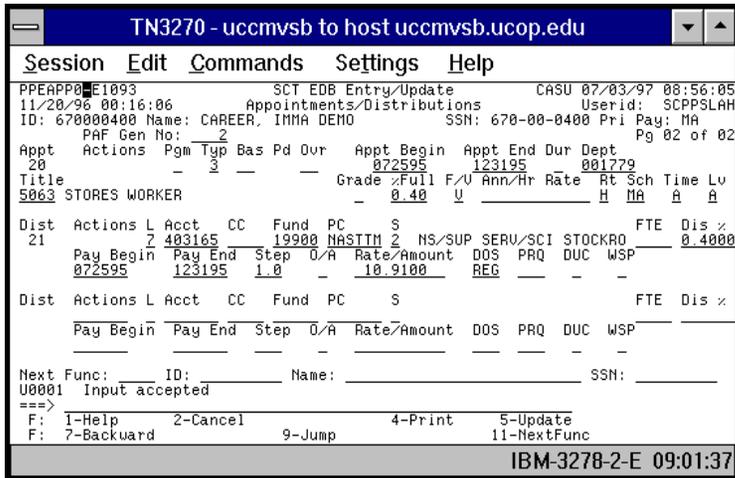1. Logon the Payroll/Personnel System.

2. At Next Function, type **EEDB** and press **Enter**.

3. Type **BUND** and press **Enter**.

4. Type **LIMI**, **employee ID number** and press **Enter**.

The **EAPP** function is displayed for the selected employee.

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   V          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 limited 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 Limited action.
PGM	Leave Blank. This is a system derived code which indicates the personnel program associated with the appointment.
Typ	Enter 2, which denotes career appointment. The employee is still a career employee. 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 limited position in the format: MMDDYY.
Appt End	Enter the date on which the employee's limited position is expected to end, in the format: MMDDYY.
Dur	Enter B. This is an end date for budgetary purposes only.
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 limited appointment. 25% is entered as .25.
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 a pay schedule code that indicates which pay schedule the appointment will be paid and consistent will other appointments, either: Monthly Current (**MO**) or Monthly Arrears (**MA**).
Time	Enter the code that represents the method or 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 that indicates the rate at which vacation and sick leave will be accrued.

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

Distribution Level Procedures

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

2. Enter data in the following fields as applicable:

Actions	Enter appropriate action code or leave blank.
L	Enter 7 for UCSC location number.
Acct	Enter 'organization' FOAPAL number.
CC	Enter cost center.
Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 1 or 2 as applicable. **Note:** Limited positions should be sub 2 in most cases.
FTE	Leave Blank for limited appointment.
Dist %	Enter the anticipated time which is chargeable to the distribution accounting unit resulting from the change in career to limited. 25% is entered as .2500
Pay Beg	Enter the date on which the salary is to begin as a result of the career to limited action in the format: MMDDYY.
Pay End	Enter the date on which the pay is expected to end due in the format: MMDDYY.
Step	If employee is appointed to a step-based title code, then enter the step within the salary range associated with the title code. Enter steps in the following format: 1.0, 1.5, 2.0, 2.5, 3.0, 3.5, 4.0, 4.5, 5.0

O/A	Leave Blank.
Rate/Amount	Enter the monthly or hourly rate reflecting the salary for this action. If hourly, then remember to use four decimal places, i.e. $10.00/hour is entered as 10.0000. If monthly, i.e., $2014.00 enter as 2014.00
DOS	Enter **REG** for regular pay.
PRQ	Leave Blank.
DUC	Leave Blank.
WSP	Leave Blank.

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

4. Press **F11 Next Func** to continue to the next function.

The **EPER** (Personnel - Miscellaneous) function should be displayed for your selected employee.

Completing the EPER Function

THE EPER (PERSONNEL MISCELLANEOUS) FUNCTION

Notes and Tips

• When processing a career to limited action, the highlighted fields should be the only fields requiring possible data entry.

EPER Data Entry Procedure

1. Enter data in the following fields as applicable:

Assigned BELI	Enter the Benefits Eligibility code which indicates the employee's eligibility for health benefits.
Effective Date	Enter the effective date of the BELI change.
Employee Relations Code	Usually remains the same, since employee remains in the same unit, same position. However, there may be special circumstances in which this code may change, i.e., Supervisor to Non-Supervisor.
Employee Relations Unit	Leave Blank as this field is system derived from the major appointment title code.
Next Salary Review Date	Delete any information in this field. Limited employees are not eligible for merit reviews.
Next Salary Review Type	Delete any information in this field.
Home Department	Usually the same, unless employee has multiple appointments, and depending upon % of time in each, the home department may change.

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

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

The **EADD** (Employee Address) function will be displayed.

Completing the EADD Function

THE EADD (EMPLOYEE ADDRESS) FUNCTION

```
uccmvsb.ucop.eduuccmvsb.ucop.edu - TN3270/TN5250 Connection          _ □ ×
Session  Edit  View  Commands  Script  Help
 ▯ ▱ ▤ ▨ ▧ ▤  ▤  ▦ ▦ ▯  ▤  ▧ ▧  ◈
PPEADD0-E1302          SCT EDB Entry/Update          CASU 11/09/00 14:42:51
10/26/00 14:20:27          Employee Address Data          Userid:  SCPPSJL
ID: 670000400 Name: CAREER, IMMA DEMO          SSN: 670-00-0400 Pri Pay: MA

Permanent Address Line 1: 9399 RODRIGUEZ ST
                  Line 2:
                  City: SANTA CRUZ            State: CA Zip: 95062
Foreign Addr Ind: _ Prov: _____ Country: __
     Postal Code: _____
Home Phone: 4754561____      Spouse Name: _____
Campus Release Codes - Perm Address: _  Home Phone: _  Spouse Name: _
Employee Organization Disclosures - Perm Address: _   Home Phone: _

Campus Address Line 1: _____
                Line 2: _____
                  City: _____ State: __ Zip: _____
Campus Phone 1: _____          Phone 2: _____
Campus Room: 000676 Building: _____

Next Func: ____  ID: _____  Name: _____  SSN: _____

===>
 F:  1-Help                 3-PrevMenu  4-Print    5-Update
 F:                         9-Jump     10-PrevFunc 11-NextFunc 12-Exit

                                              Line  5  Column  28
                                                    NUM
```

Notes and Tips

- If the information is current then you should proceed to the next function.

EADD Data Entry

1. Change any of the data in the following field(s) as applicable:

Campus Phone(s)	Office telephone number(s) at which the employee can be reached.

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

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

The **EPD1** (Employee Personal Data 1) function will be displayed.

Completing the EPD1 Function

THE EPD1 (EMPLOYEE PERSONAL DATA 1) FUNCTION

```
uccmvsb.ucop.eduuccmvsb.ucop.edu - TN3270/TN5250 Connection          _ □ X
 Session  Edit  View  Commands  Script  Help
 ▯ ▭ ▤ ▥ ▦▮ ▧ ▨▩ ▫ ▬ ▭ ▮ ▯▭ ◈
 PPEPD10-E1302          SCT EDB Entry/Update        CASU 11/09/00 14:47:24
 10/26/00 14:20:27        Employee Personal Data 1       Userid:  SCPPSJL
 ID: 670000400 Name: CAREER, IMMA DEMO        SSN: 670-00-0400 Pri Pay: MA


 Date of Birth: 062656
 Sex: F
 Ethnic: F
 Veteran Status Codes - Vietnam: N War/Campaign: _ Disability: N
 Disabled Status: N
 Citizenship: C
 Student Status: 1 No. of Reg. Units: ____
 Pay Disposition Code: 000676




 Next Func: ____  ID: _____  Name: _____  SSN: _____

 ===> _____
  F:  1-Help           3-PrevMenu  4-Print    5-Update
  F:                   9-Jump     10-PrevFunc          12-Exit

                                          Line  6  Column  17
                                              NUM
```

Notes and Tips

- If the information is current then you should proceed to *Review*.

EPD1 Data Entry

1. Change any of the data in the following fields as applicable:

Student Status	Code indicating the employee's student status with the University of California.
Pay Disposition Code	Enter Mail Code (See *Appendix J, Mail Codes*). Used to deliver checks and surepay stubs.

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

3. This is the last function in the LIMI Bundle. Proceed to *Review*.

Review

1. Make sure you have completed all the required data elements.

2. Review all entered data for accuracy and consistency.

Updating the Employee Database

Press **F5 Update** to display the PAN Subsystem Notification Preparation screen.

Consistency Edits

If there are consistency edits, the Consistency Edit (ECON) screen is automatically displayed. Review all error messages and make necessary corrections.

How to Correct Consistency Errors

From the ECON screen you may:

- Correct errors directly on the ECON screen.

- **F3 Return** to the last data entry function, make any corrections, then do one of the following:

    - Press **F5 Update** to invoke PAN.

    - Press **F2 Cancel** twice to cancel the update and leave the EDB unchanged.

See *Consistency Edit Messages (ECON)* in *Section 1.6, System Messages* in this manual for more information and instructions.

PAN Preparation

After pressing **F5 Update** from a data entry screen (if there are no consistency edits) or an ECON screen, you are automatically positioned at the PAN **Comments Entry** screen. From here you can add comments and additional reviewers to the PAN.

1. Add a description of the action and any significant details in the **Comments Entry** screen.

2. Press **F10 NotfPrep** to display the **Notification Preparation** screen, where you can add reviewers as desired.

3. Press **F11 Detail** to display the **Activity Review** screen, where you can review the notification before sending it.

4. Press **F5 Update** to complete the update and send the notification.

If the update is successful, the first function in the bundle appears and displays:

U0007 UPDATE PROCESS COMPLETE

For more information about PANs and additional PAN features, please refer to *Section 1.8, Post Authorization Notification (PAN)*.

Accessing IMSG

1. To access the Message Report Screen go to the **Next Function** field, type **IMSG** and press **Enter**.

2. When the **IMSG** screen is displayed, review any remaining messages and take the appropriate action.

Disposition of Forms

- Forward forms as appropriate.