
4.6 INTERLOCATION TRANSFERS

Employees who are coming from or going to another campus in the UC system, without a break in service, are considered Interlocation Transfers.

A **permanent interlocation transfer** occurs when an employee terminates employment with one campus, accepts employment at another campus, and *does not intend to return to work for the original campus*.

A **temporary interlocation transfer** occurs when an employee at one campus (*home campus*) accepts a position at another campus (*host campus*) for a period of *one year or less*, with the *intent to return* to work for the home campus at the end of this period.

Multilocation appointments occur when an employee is employed by two or more campuses simultaneously. The campuses at which the employee are employed are designated *home* and *host* campuses.

A **one-time payment** is required when an employee at one campus (*home*) is eligible to receive a payment originating from another campus (*host*).

Multilocation appointments and one-time payments will not be covered here, as they do not apply to the Payroll/Personnel System, with respect to on-line entry update (OEU).

For both the Permanent and Temporary Interlocation Transfer, the data bases of **both** the home and host campus must be updated to reflect the transfer.

The Academic Divisions and Staff Employment responsibility for interlocation transfers are to determine that an interlocation transfer situation exists.

Since July, 2005 Academic Divisions and Staff Employment Office are updating their own permanent interlocation transfers. Payroll's role is auditing the transactions post online entry update (OEU). This gives the Academic Divisions and SHR Teams more control over timing and management of their affected employees.

The following outline both outgoing and incoming transfer procedures for both permanent and temporary in nature:

Outgoing Intercampus Transfer - Permanent:

Employee currently holds an appointment at UC Santa Cruz.
Employee is terminating their position at Santa Cruz and accepting a position at another UC campus **with no break in service**.

The Academic Divisions and SHR Teams proceed as follows:

Obtain required approval to perform the PPS action.

Have the employee complete the following forms:

- Letter of resignation (voluntary separations)

Retain letter of resignation for your records.

For issues related to the timing of this action, refer to [Section 2.3, Timing](#)

Data Entry

Enter data for the separation via the **SEPR** bundle. This bundle contains the following functions:

ESEP (Separation)

EAPP (Appointments/Distributions)

ELVE (Leave of Absence)

EADD (Employee Address)

EPD1 (Employee Personal Data 1)

Accessing SEPR

1. Log on to the Payroll/Personnel System.
2. At the **Next Func** field, type **EEDB** and press **Enter**.

3. Type **SEPR**, employee **ID number**, and then press **Enter**.

The **ESEP** Separation function is displayed.

Completing the ESEP Separation Function

THE ESEP (SEPARATION) FUNCTION

```

UCMBVSB UCOP.EDU - TN3270/TN5250 Connection
Session Edit View Tools Commands Help
PESEPO-E1144          SCT EDB Entry/Update      SEPR 05/18/98 08:46:56
04/23/98 09:40:01    Separation                               Userid: SCPPSLAH
ID: 010000220 Name: CASUAL, STAFF DEMO    220 Pri Pay: MA

Last Day on Pay      : 022898
Separation Date      : 022898              Reason: AA  Destination: A
Future Institution Code: _____        Intercampus Transfer: __

Next Func: _____ ID: _____ Name: _____ SSN: _____
U0001 Input accepted
====>
F: 1-Help      2-Cancel      9-Jump      4-Print      5-Update
F:            11-NextFunc

Line 5 Column 27
NUM
    
```

ESEP Notes and Tips

The Separation Date is usually the same as the last day on pay status unless employee has been on a leave of absence without pay.

The ESEP Procedure

1. Enter data in the following fields as applicable:

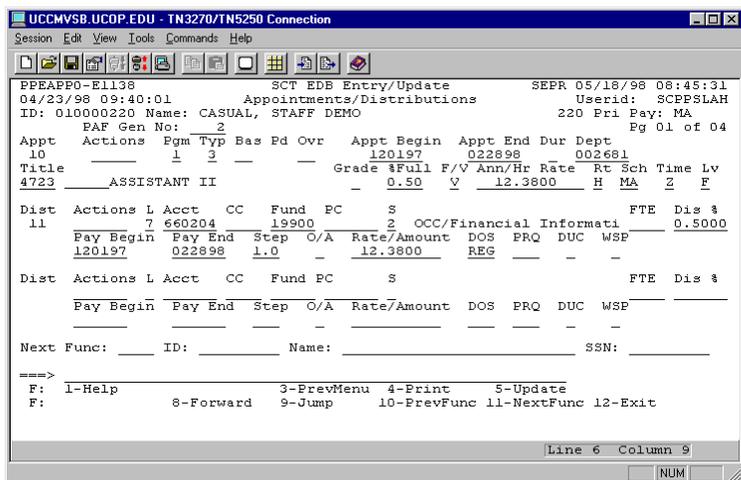
Last Day on Pay	The last day the employee was on pay status in the format: MMDDYY (Last day on pay status may not be the same as the separation date, i.e., ee on LWOP and then separates)
Separation Date	The date upon which the separation is effective in the format: MMDDYY.
Reason	Enter IT
Destination	Enter L

Future Inst Code	Enter the Code indicating the location to which the employee will be transferring. Codes are: <table> <thead> <tr> <th>CAMPUS</th> <th>INSTITUTION CODE</th> </tr> </thead> <tbody> <tr><td>Merced</td><td>Not assigned</td></tr> <tr><td>Berkeley</td><td>NRB</td></tr> <tr><td>San Francisco</td><td>NAQ</td></tr> <tr><td>Davis</td><td>NBX</td></tr> <tr><td>Los Angeles</td><td>NAU</td></tr> <tr><td>Riverside</td><td>NAN</td></tr> <tr><td>San Diego</td><td>NBG</td></tr> <tr><td>Santa Cruz</td><td>NBU</td></tr> <tr><td>Santa Barbara</td><td>NBQ</td></tr> <tr><td>Irvine</td><td>NBL</td></tr> <tr><td>UCOP</td><td>NAU</td></tr> <tr><td>Lawrence Berkeley Labs</td><td>Not assigned</td></tr> <tr><td>Lawrence Livermore National Labs</td><td>Not assigned</td></tr> <tr><td>Los Alamos National Labs</td><td>Not assigned</td></tr> <tr><td>Hastings</td><td>Not assigned</td></tr> </tbody> </table> <p>If no code is assigned leave blank.</p>	CAMPUS	INSTITUTION CODE	Merced	Not assigned	Berkeley	NRB	San Francisco	NAQ	Davis	NBX	Los Angeles	NAU	Riverside	NAN	San Diego	NBG	Santa Cruz	NBU	Santa Barbara	NBQ	Irvine	NBL	UCOP	NAU	Lawrence Berkeley Labs	Not assigned	Lawrence Livermore National Labs	Not assigned	Los Alamos National Labs	Not assigned	Hastings	Not assigned
CAMPUS	INSTITUTION CODE																																
Merced	Not assigned																																
Berkeley	NRB																																
San Francisco	NAQ																																
Davis	NBX																																
Los Angeles	NAU																																
Riverside	NAN																																
San Diego	NBG																																
Santa Cruz	NBU																																
Santa Barbara	NBQ																																
Irvine	NBL																																
UCOP	NAU																																
Lawrence Berkeley Labs	Not assigned																																
Lawrence Livermore National Labs	Not assigned																																
Los Alamos National Labs	Not assigned																																
Hastings	Not assigned																																
Interlocation Transfer Code	Enter: 21																																

2. Press **Enter** to invoke range/value edits.
 3. Press **F11** to continue to the next function.
- The **EAPP** Appointment function is displayed.

Completing the EAPP Function

THE EAPP(APPOINTMENTS/DISTRIBUTIONS) FUNCTION



EAPP Notes and Tips

- All appointments and distributions must be ended on or before the separation date.
- If the employee has future appointments/distributions (i.e., the begin date comes after the date of separation), you can use the Delete Command to cease the future appointments and distributions.

(See [Section 1.5, User Navigation and Entry/Update Commands](#), for instructions on the use of the Delete command.)

The Appointment Level Procedure

1. **Tab** or **F15 NewLine** to the current appointment(s).
2. Enter data in the following fields, as applicable:

Actions (Action Code)	Leave Blank. System Derived for a separation.
Appt End	Enter the date on which the separation is effective in the format: MMDDYY.
Duration	Enter an asterisk (*) to delete data in this field, if applicable.

The Distribution Level Procedure

1. **Tab** or **F15 NewLine** to the current distribution(s).
2. Enter data in the following fields, as applicable:

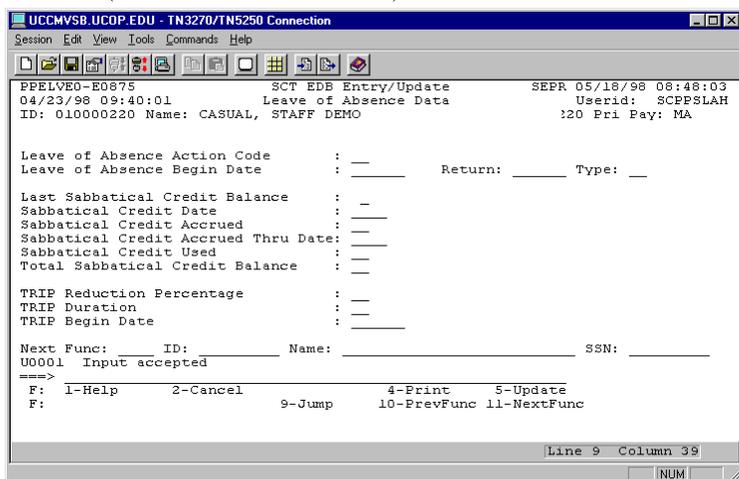
Actions (Action Code)	There is no required action code at the distribution level.
Pay End	Enter the date on which the separation is effective in the format: MMDDYY.

3. Press **Enter** to invoke range/value edits.
4. Press **F11 Next Func** to continue to the next function.

The **ELVE** (Leave of Absence Data) function will be displayed.

Completing the ELVE Function

THE ELVE (LEAVE OF ABSENCE DATA) FUNCTION



ELVE Notes and Tips

- If an employee is on a leave of absence and the return date is after the separation date, then you should change the return date to match the separation date.
- If the return date is before the separation date and the employee will return before separating, then take no action.
- If the return date is before the separation date, but the employee will not return prior to separation, then extend the leave of absence to the point of separation.

The ELVE Procedure

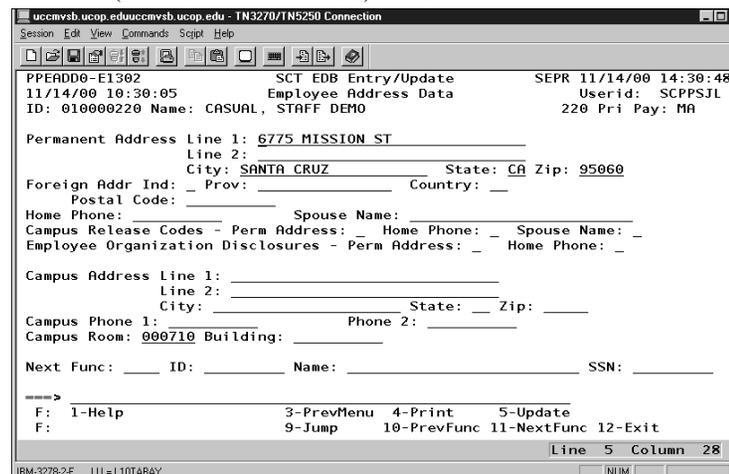
1. Enter data in the following fields, as applicable:

Leave of Absence Begin Date	Should be no change to existing leave of absence begin date.
Return Date from LNP	Enter the appropriate return date. See <i>ELVE Notes and Tips</i> .

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.

Completing the EADD Function

THE EADD (EMPLOYEE ADDRESS) FUNCTION



Update with new location permanent address.

EADD PROCEDURE

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

4.6—5

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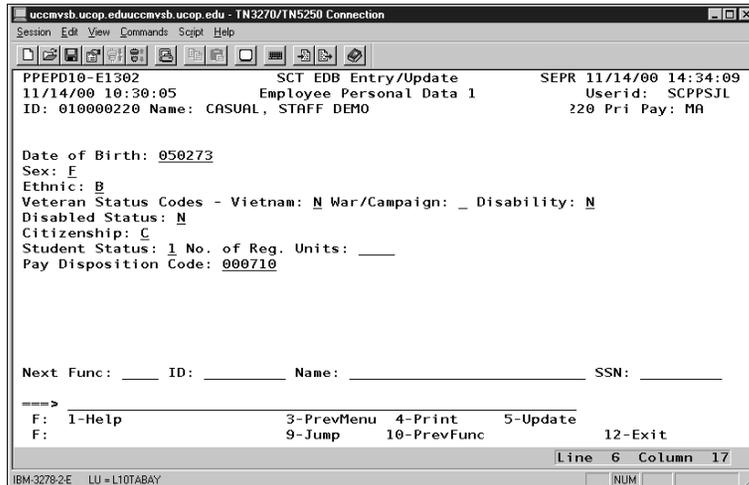
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<p>Permanent Address</p>	<p>Line 1: First line of the address to which all university mail may be sent (e.g., benefits statement, tax information.) Maximum 30 characters.</p> <p>Line 2: Automatic continuation of address Line 1, if the first line of the address is exceptionally long (e.g., use for apartment numbers, building names, etc.) Maximum 30 characters.</p>
<p>Permanent Address</p>	<p>City: City portion of the address. US and foreign addresses. Max 21 characters.</p> <p>State: State portion of the address. United States addresses only.</p> <p>Zip: Zip code associated with the address. United States addresses only.</p>
<p>Foreign Address</p>	<p>Ind. Enter F if this is a foreign address.</p> <p>Prov. Foreign addresses only. Province associated with the address, if applicable. Maximum 30 characters.</p> <p>Cntry. Foreign address only. Two-digit country code associated with the address. Press F1 Help to see valid codes.</p> <p>Postal Code. Foreign addresses only. Postal code associated with the address.</p>

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.

Completing the EPD1 Function

EPD1 (EMPLOYEE PERSONAL DATA 1) FUNCTION



The EPD1 function allows you to change the check disposition address. (If there are no changes, proceed to *Review*.)

Pay Disposition Code	Enter Mail Code (See Appendix J, Mail Codes). Used to deliver checks and surepay stubs.
----------------------	--

1. Press **Enter** to invoke range/value edits.
2. This is the last function of the SEPR bundle. Proceed to *Review*.

Review

1. Use **F10** or **F11** to navigate through the SEPR bundle.
2. Make sure you have completed all the required data elements.
3. 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 the appropriate approval document to the mandatory reviewer.
- Complete the [Outgoing Interlocation Memo to Payroll](#) .
- Attach backup to memo and send to Payroll per column eight on the Payroll Deadline Schedule (last day of open period).

Payroll's Role

The Payroll Office will:

- Contact other UC location
- Adjust any data necessary in PPS prior to compute
- Provide other location with all data and financial documents they need to set up employee on their data base.

Outgoing Intercampus Transfer - Temporary:

Employee currently holds an appointment at UC Santa Cruz. Employee is leaving their position at Santa Cruz and accepting a position at another UC location with **no break in service**. The duration is **one year or less**. The employee *will be returning to Santa Cruz* at the end of this period.

Academic Divisions and SHR Teams proceed as follows:

1. **Academic leaves** continue to use the **UPAY573** (Payroll/Personnel Sabbatical Leave/Special Leave of Absence), so the UPAY573 should be completed and update in PPS see section [7.6](#).
2. Complete the [Outgoing Temporary Intercampus Transfer DCD](#) (see DCD section in this manual). The data contained on this form includes:
 - leave begin date and return date
 - type of leave
 - campus employee will be transferring to
 - any information obtained from the other UC campus regarding the appointment, department, etc. at which the employee will be working.

Disposition of Forms

- Forward the appropriate approval document to the mandatory reviewer.
- Attach backup to DCD and send to Payroll per column eight on the Payroll Deadline Schedule (last day of open period).
- Contact other UC location

Payroll's Role

The Payroll Office will:

- Adjust any data necessary in PPS prior to compute
- Provide other location with all data and financial documents they need to set up employee on their data base

Incoming Intercampus Transfer - Permanent:

This only pertains to Central Offices and Academic Divisions that process hire actions. Staff HR Employment handles all staff incoming interlocation transfer updates.

Employee currently holds an appointment at another UC campus. Employee is terminating their position at the other campus and accepting a position at Santa Cruz with **no break in service**.

Academic Divisions or Staff HR Employment proceeds as follows:

Before You Start

- Obtain required approval in the form of the final Offer of Employment Letter to perform the payroll/personnel action.

Employee does not have to complete the oath/patent, or I-9, as this is not a “hire action” it is continued employment. We use the hire bundle merely as mechanism to get the employee on our data base.

The following forms may be completed if this data is changing from employee’s previous location.

- UC Federal and State Withholding Allowance Certificate (UC W-4/DE 4)
- Benefits Eligibility Level Indicator (BELI) form (UPAY 726)
- Demographic Data Transmittal form (U5605) – if academic
- Earnings Disposition (Direct Deposit) form, if applicable
- Physician Designation Form (SC 50), voluntary
- *Note: The Adult/Child Abuse forms are required for certain department positions. Contact Academic Human Resources for*

information. These forms are to be retained in the dean's office.

Prepare information for on-line entry.

Use the **AHIR** (Academic Hire) bundle to enter data for hiring an employee for an academic position. This bundle contains the following functions:

EEID (Employee Identification)

EADD (Employee Address)

EPD1 (Employee Personal Data 1)

EPD2 (Employee Personal Data 2)

ELIC (License/Certificate Data)

EPER (Personnel-Miscellaneous)

EAPP (Appointments/Distributions)

XTAX (Tax Information)

EALN (Alien Information)

EACD (Academic Service)

EHON (Honors Data)

Staff SHR Employment will use the SHIR Bundle

Accessing AHIR / SHIR

1. Log on to the Payroll/Personnel System.
2. At the Next Func field, type **EEEDB** and press **Enter**.
3. Type **BUND** and press **Enter**.
4. Type **AHIR** or **SHIR** as appropriate and press **Enter**.

The Employee Identification (**EEID**) function is displayed.

Completing the EEID Function

THE EEID (EMPLOYEE IDENTIFICATION) FUNCTION

Notes and Tips

- Do not enter commas or periods in the first, middle, or last name fields.
- Use F1 Help for field-level or screen-level on-line help.

The EEID Processing Steps

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

Employee ID	Enter employee's nine-digit social security number, without hyphens.
SSN	Nine-digit social security number, without hyphens.
First Name	Employee's first name.
Middle Name	Employee's middle initial (or middle name), if applicable, as verbatim from Social Security card.
Last Name	Employee's last name. <i>The system will accept a maximum of 26 characters for all three names together.</i>
Suffix	If applicable. Any suffix to the employee's last name, such as Jr. or III. Do not include any degree information, such as MD or Ph.D., in the suffix field.
Result	System-derived employee name.
Date of Birth	Employee's date of birth in the format MMDDYY.
Intercampus Transfer	Enter: 21

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.

Completing the EADD Function

THE EADD FUNCTION (EMPLOYEE ADDRESS)

The screenshot shows a terminal window titled 'uccmvsb.ucop.eduuccmvsb.ucop.edu - TN3270/TN5250 Connection'. The main display area contains the following text:

```

PPEADD0-E1302          SCT EDB Entry/Update      AHIR 11/14/00 15:34:31
                    Employee Address Data      Userid: SCPPSJL
ID: 650000007 Name: NEWHIRE, ACADEMIC DEMO   SSN: 650-00-0007 Pri Pay:

Permanent Address Line 1: 1234 MAIN STREET
                  Line 2:
City: SANTA CRUZ      State: CA Zip: 95060
Foreign Addr Ind:  _  Prov:      Country:  _
Postal Code:
Home Phone: 8314234180 Spouse Name:
Campus Release Codes - Perm Address: N Home Phone: N Spouse Name: N
Employee Organization Disclosures - Perm Address: N Home Phone: N

Campus Address Line 1:
                  Line 2:
City:                State:  _ Zip:  _
Campus Phone 1: 5982 Phone 2:
Campus Room:      Building:

Next Func:  _  ID:      Name:      SSN:

====>
F: 1-Help      2-Cancel      4-Print      5-Update
F: 9-Jump      10-PrevFunc  11-NextFunc

Line 17 Column 47
    
```

The EADD Procedure

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

Permanent Address	<p>Line 1: First line of the address to which all university mail may be sent (e.g., benefits statement, tax information.) Maximum 30 characters.</p> <p>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.) Maximum 30 characters. Otherwise leave blank.</p> <p>City: City portion of the address. United States and foreign addresses. Maximum 21 characters.</p>
-------------------	--

Permanent Address (cont.)	<p>State: State portion of the address. United States addresses only.</p> <p>Zip: Zip code associated with the address. United States addresses only.</p>
Foreign Address	<p>Ind: Enter F if this is a foreign address.</p> <p>Prov: Foreign addresses only. Province associated with the address, if applicable. Maximum 30 characters.</p> <p>Cntry: Foreign address only. Two-digit country code associated with the address. Press F1 Help from this field to see valid codes.</p>
Postal Code	Foreign addresses only. Postal code associated with the address, if applicable.
Home Phone	Enter home phone.
Spouse Name	Enter spouse name. (Optional)
Campus Release Codes	Leave blank to disclose, or enter 'N' in each field to NOT disclose.
Employee Organization Disclosures	Code indicating whether the employee has authorized the University to release their home address and home phone to employee organizations. Otherwise, these organizations will use campus address/phone. Leave blank to disclose, enter 'N' in each field to NOT disclose.
Campus Address	Leave blank.
Campus Phone(s)	Telephone number(s) at which the employee can be reached.

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2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.

Completing the EPD1 Function

THE EPD1 FUNCTION (EMPLOYEE PERSONAL DATA 1)

The screenshot shows a terminal window titled 'ucscmvsh.ucop.edu' with the following content:

```

ucscmvsh.ucop.edu - TN3270/IN5250 Connection
Session Edit View Commands Script Help
PPEPD10-E1302      SCT EDB Entry/Update      AHIR 11/14/00 15:55:31
Employee Personal Data 1      Userid: SCPPSJL
ID: 650000007 Name: NEWHIRE, ACADEMIC DEMO      SSN: 650-00-0007 Pri Pay:

Date of Birth: 012556
Sex: E
Ethnic: A
Veteran Status Codes - Vietnam: N War/Campaign: N Disability: N
Disabled Status: N
Citizenship: C
Student Status: 1 No. of Reg. Units: ____
Pay Disposition Code: 000900

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

====>
F: 1-Help      2-Cancel      4-Print      5-Update
F:              9-Jump      10-PrevFunc  11-NextFunc

Line 20 Column 13
IBM-3278-2E LU=L10TABAY CAP INUM
    
```

Notes and Tips

- Employees should self-identify ethnic, disability, and veteran status on the Demographic Data Transmittal form (U5605).

The EPD1 Procedure

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

Date of Birth	Entered on the EEID function
Sex	Code indicating the sex of the employee. (For reporting statistics of the University workforce only.) M = male and F = female.

Ethnic	Code indicating the ethnic identity of the employee. (For reporting statistics of the University workforce only.) Code from the Demographic Data Transmittal
Veteran Status Codes	Codes indicating the employee's veteran status. (For reporting statistics of the university workforce only.) Codes and definitions from the Demographic Data Transmittal
Disabled Status	Code indicating that the employee has a disability. (For reporting statistics of the University workforce only.) Code from Demographic Data Transmittal
Citizenship Code	Code indicating the employee's citizenship status, with respect to the United States. Press F1 Help to see valid codes.
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.
No. of Reg. Units	A system derived code indicating the number of UC class units in which an employee who is a UC student is registered.
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. Press **F11 Next Func** to continue to the next function.

Completing the EPD2 Function

EPD2 (EMPLOYEE PERSONAL DATA 2)

Notes and Tips

- Refer to [Section 1.13, Help](#) for information about how to use the Find String command in F1 Help for locating institution code.

The EPD2 Procedure

- Enter data in the following fields, as applicable:

PIN Signature Date	Leave Blank.
--------------------	--------------

Oath Signature Date	Date the Oath of Allegiance was signed by the employee, in the format: MMDDYY. <i>Note: Not required for Interlocation Transfers, however if the employee did complete an Oath, enter the oath date as described above. If no oath was completed enter the Santa Cruz hire date.</i>
I-9 Date	Date the I-9 (Employment Eligibility Verification) form was signed by the employee, in the format: MMDDYY. <i>Note: Not required for Interlocation Transfers, however if the employee did complete an I-9, enter the I-9 date as described above.</i>
Education Level Code	Code indicating the highest level of education attained by the employee. Press F1 Help to see valid codes.
Education Level Year	Year in which the employee's highest level of education was attained.
Non-UC Prior Service Code	Code indicating the type of employment service prior to the most recent University employment. Press F1 Help to see valid codes.
Prior Service Months	Leave blank. This Payroll will complete.

The EPER Procedure

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

Assigned BELI	Benefits Eligibility Level Indicator (BELI) code indicating the employee's eligibility for health benefits. Code from BELI form or press F1 Help to see valid codes.
Derived BELI	System-derived BELI code based on data entered previously. Normally the same as the assigned BELI code.
Effective Date	Date the employee becomes eligible for any health benefits indicated by the BELI code.
BELI Status Qualifiers	<p>Primary: Code indicating the primary condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press F1 Help to see valid codes.</p> <p>Date: Date on which the qualifying condition began, in the format: MMDDYY.</p> <p>Secondary: If applicable. Code indicating an additional condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press F1 Help to see valid codes.</p> <p>Date: Date on which the additional qualifying condition began, in the format: MMDDYY.</p>
Date of Hire	Date on which the <i>most recent</i> employment affiliation commenced. Payroll will adjust hire date upon receipt of packet.
Original Hire Date	Leave blank.

Employee Relations Code	Code indicating the employee designation/status for the purpose of collective bargaining. Press F1 Help to see valid codes, or refer to Appendix E, Employee Relations Codes for assistance in determining the appropriate code.
Employee Relations Unit	Code indicating collective bargaining unit of an individual. Press F1 Help to see valid codes or refer to Appendix E, Employee Relations Codes .
Next Salary Review Date	Currently not developed for academic reviews. Use is at discretion of academic division.
Next Salary Review Type	Currently not developed for academic reviews.
Merit Rate Increase Percent	For future use.
Home Dept	Six-digit service center home department code. Press F1 Help to see valid codes.
Primary Title Code	System derived for employees with multiple titles. Code indicating the primary title code that will be used for reporting purposes.
Employee Unit Code	System-derived code indicating the collective bargaining unit associated with the employee's job title.
Employee Representation Code	System-derived code indicating, for collective bargaining purposes, whether the employee is covered, not covered, or a supervisor.

Employee Special Handling Code	Code indicating the title special handling code of the predominate appointment of an individual for collective bargaining purposes.
Employee Distribution Unit Code	Code indicating the predominate distribution of the predominate appointment of an individual for collective bargaining purposes.
Job Group ID	System-derived code used for reporting.
Alternate Department Code	Code indicating an alternate department that may update the employee's personnel record. Used to give departments with joint appointments access to the employee's records. Press F1 Help to see valid codes.
Academic Prog. Unit Code	For future use.

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.

Completing the EAPP Function

EAPP (APPOINTMENTS/DISTRIBUTIONS)-APPOINTMENT LEVEL

Notes and Tips

- Always enter a decimal point in the percentage and rate fields. The decimal point on the keypad does not work.
- Do not enter commas or dollar signs in the rate fields.
- Refer to [Appendix C, Vacation/Leave Accrual Codes and Rates](#), to determine appropriate leave codes for this appointment.
- Academic Steps are entered as a single digit. No decimal point followed by a second digit (not roman numerals).

The Appointment Level Procedure

1. Use the **F9 Jump** key and then the **F15 Newline** key to go to the command line
2. At the command line type “**add a**” to set up the first available appointment.

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

Actions (Action Code)	Is system derived on new hires indicating the personnel action which affected the associated appointment.
Pgm	System-derived code identifying the personnel program under which the appointment is held.
Typ	Enter 5 (academic) or enter appropriate staff type (refer to 1.11-3) Code indicating the appointment type associated with the appointment. Press F1 Help to see valid codes.
Bas	Code indicating the service period on which an appointment is based. Press F1 Help to see valid codes.
Pd Ovr	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 the appointment is indefinite or tenured, enter 999999.
Dur	I - Indefinite T - Tenured Leave blank if appointment has a definite end date. Code indicating the expected duration of the appointment.

Dept	A system derived code indicating the department or other administrative unit associated with the appointment. No entry required.
Title	Code indicating the position or classification title for this appointment. Press F1 Help to see valid codes.
Grade	For academics, leave blank.
% Full	The percentage of time the employee is expected to work in the appointment. Enter 1.00 for full time.
F/V	F - Fixed V - Variable Code indicating whether the time the employee will work in the appointment is a fixed or variable percentage of time.
Ann/Hr Rate	The annual salary or hourly rate associated with the appointment.
Rt	A - annual H - hourly B - by agreement Code indicating whether the rate of pay is annual, hourly, or by agreement.
Sch	MO - Monthly Current MA - Monthly Arrears Code indicating the pay schedule on which the appointment will be paid.

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Time	T - exception A - positive W - without salary Code indicating the method for reporting time worked in the appointment.
Lv	Code indicating the rate at which vacation and sick leave will be accrued. See Appendix C, Vacation/Leave Accrual Codes and Rates.

The Distribution Level Procedure

1. **F9 Jump** to the command line and type “**add d**” to set up the first available distribution.
2. Enter data in the following fields, as applicable:

Actions (Action Code)	Code is not required for a new hire at the distribution level.
L	Enter 7 for UCSC location number.
Acct	Enter ‘organization’ FOAPAL number.
Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 0 or 2 as applicable.
FTE	The percentage of the budgeted position which the distribution represents, if applicable. Full time is represented as 1.00.
Dist %	The anticipated percentage of time which is chargeable to the account/fund. Full time is represented as 1.0000.
Pay Beg	Date on which the pay is expected to begin to be charged to the account/fund, in the format: MMDDYY.
Pay End	Date on which pay is expected to end for the account/fund, in the format: MMDDYY. If indefinite or tenured, Enter 999999.
Step	The step within the salary range associated with the title code. Enter as one digit for academics.

O/A	For academics, code indicating that the employee's pay rate is off-scale or above scale in relation to the step and/or salary range for the title code of the appointment, if applicable. Press F1 Help to see valid codes.
Rate/Amount	The monthly, hourly, or by agreement amount associated with the distribution.
DOS	Code indicating the type of compensation associated with the distribution. For Santa Cruz codes refer to Appendix D, Description of Service (DOS) Codes .
PRQ	Code indicating the type of perquisite provided.
DUC	A system derived code indicating a group within a bargaining unit to which a distribution for an appointment is assigned for collective bargaining purposes, excluding range adjustments.
WSP	Not used for academics.

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.

Completing the XTAX Function

XTAX (TAX INFORMATION)

```

TN3270 - scrnshts to host uccmvsb.ucop.edu
Session Edit Commands Settings Help
PPXTAX0-E0907          SCT EDB Entry/Update      11/27/96 10:50:13
11/19/96 22:34:39      Tax Information - Departments  Userid: SCPPSLAH
ID: 010000220 Name: CASUAL, STAFF DEMO      SSN: 010-00-0220 Pri Pay: MA

Retirement System Code: FICA Eligibility Code: Ret FICA Derive:
Federal
Marital Status      : S
Personal Allowances : 3

California
Marital Status      : S
Personal Allowances : 1
Itemized Deductions : 0

Additional Withholding
Federal             :
California          :

SSN: 010000220
Next Func: ID: Name: SSN:

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

IBM-3270-2-E 10:57:15
    
```

Notes and Tips

- **IMPORTANT:** SHR Teams and Academic Divisions should **not** advise employees on their tax withholding or allowances. Refer employees with tax questions to their tax advisor.
- W-4 is not required for Interlocation transfers. Update W-4 data only if employee completed new W-4 form. If no form completed, allow system to auto derive. Payroll will adjust to appropriate withholding level when packet is received.

If employee completed W-4 proceed as follows:

- If the employee is claiming Exempt, they cannot enter allowances on UCW-4/DE 4 form.
- Tax data must be entered directly from the UCW-4/DE form completed by the employee.

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- If an employee requests Earned Income Credit, please contact the Payroll Office.

The XTAX Procedure

See [Section 4.5, W-4 Procedures](#) for W-4 Procedures

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

Completing the EALN Function

EALN (ALIEN INFORMATION)

```
TN3270 - uccmysb to host uccmysb.ucop.edu
Session Edit Commands Settings Help
PPEALN0E0964 SCT EDB Entry/Update AHIR 10/16/95 17:10:00
Alien Information Userid: SCPPSWCP
ID: 650000007 Name: NEWHIRE, ACADEMIC DEMO SSN: 650-00-0007 Pri Pay:
Citizenship: C Country of Residence:
Visa Type : Visa/Work Permit End Date:
Tax Treaty Income Code : Alt Tax Treaty Income Code:
Article Number : Retirement System Code: U
End Date : FICA Eligibility Code: E
Income Limit : Ret FICA Derive:
Other State Tax CA Res :
Other State Name :
Federal Tax Marital Status: S Allowances: 3
Maximum Withholding: 0 Additional Fed Withholding:
Calif. Tax Marital Status: H Allowances: 3 Itemized Deductions: 0
Maximum Withholding: 0 Additional CA Withholding:
Non-UC Health Exp : Non-Resident Alien Tax Form Indicator:
Next Func: ID: Name: SSN:
U0001 Input accepted
===>
F: 1-Help 2-Cancel 4-Print 5-Update
9-Jump 10-PrevFunc 11-NextFunc
IBM-3278-2-E 17:13:38
```

Notes and Tips

- See section [4.12 non resident alien](#) if transfer employee is non resident alien.

- When processing a hire for an employee who is a permanent resident (i.e., holds a Green Card), enter data in the Visa Type Field. See [Section 4.11, Resident Alien Coding](#) for further instructions.

EALN Procedure

1. Enter data in the following field, as applicable:

Visa Type	Code indicating the type of visa held by an individual. Enter PR, Permanent Resident (Green Card).
-----------	--

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.

For academic specific functions not covered here see section [7.2 Academic New Hire](#).

Review

Use **F10 Prev Func** and **F11 Next Func** to navigate through the bundle.

1. Make sure you have completed all the required data elements in the bundle.
2. Review all entered data for accuracy and consistency.

Updating the Employee Database

Press **F5 Update** to invoke consistency errors and to display the PAN Subsystem Notification Preparation function.

Consistency Edit Errors

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

How to Correct Consistency Errors

From the ECON function you may:

- Correct errors directly on the ECON function.
- **F3 Return** to return to the bundle, and navigate to the appropriate functions to make any corrections, then do one of the following:
 - Press **F5 Update** to invoke PAN.
 - Press **F2 Cancel** twice to cancel the update.

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.

5. Add a description of the action and any significant details in the **Comments Entry** screen.
6. Press **F10 NotfPrep** to display the **Notification Preparation** screen, where you can add reviewers as desired.
7. Press **F11 Detail** to display the **Activity Review** screen, where you can review the notification before sending it.
8. Press **F5 Update** to complete the update and send the notification.

If the update is successful, the first screen 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** or **Return**.
2. When the IMSG screen is displayed, review any remaining messages and take the appropriate action.

Disposition of Forms

- Forward the appropriate approval document to the mandatory reviewer.
- Complete the [Incoming Interlocation Memo to Payroll](#) .
- Attach backup to memo and send to Payroll per column eight on the Payroll Deadline Schedule (last day of open period).

Payroll's Role

The Payroll Office will:

- Contact other UC location
- Adjust any data necessary in PPS prior to compute
- Obtain from other location all data and financial documents needed to set up employee on our data base.

Incoming Intercampus Transfer – Temporary and One–Time Payment:

Employee currently holds an appointment at another UC location.

For Temporary Transfer, employee is leaving their position at the other campus and accepting a position at Santa Cruz with **no break in service**. The duration is **one year or less**. The employee will be returning to the other campus at the end on this period.

For One-Time Payment, Santa Cruz has hired another location employee to perform one time service.

Temporary Transfer:

Appointment will not be set up on Santa Cruz data base. Employee continues to be paid at their home location. Complete [UPAY 560-T \(Multilocation Appointment Form\)](#) and forward to the Payroll Office.

One-Time Payment:

When paying an employee from other location for one- time payment, complete [UPAY 644C-T \(Interlocation One –Time Payment\)](#) and forward to the Payroll Office. Payment will be issued by their home location.

Any questions regarding Interlocation Transfers, or Interlocation One-Time Payments should be directed to the Payroll Office.

List of UC Campuses

LOCATION #	CAMPUS
0*	Merced
1	Berkeley
2	San Francisco
3	Davis
4	Los Angeles
5	Riverside
6	San Diego
7	Santa Cruz
8	Santa Barbara
9	Irvine
M*	UCOP
	Lawrence Berkeley Labs
	Lawrence Livermore National Labs
	Los Alamos National Labs
	Hastings

* administered by UCLA