

2.1 APPOINTMENT CODING

USE THIS CHAPTER IN CONJUNCTION WITH [SECTION 1.11 – APPOINTMENTS AND DISTRIBUTIONS \(GENERAL INFORMATION\)](#) TO DETERMINE PROPER APPOINTMENT CODING.

Overview

Appointments are established to define the terms and conditions of employment with the University and should be reflective of the effort (percentage of time) that is required to perform the duties on a regular basis. For example, the appointment records the nature of the appointment (fixed or variable), beginning and ending dates of the appointment, the department the appointment is in, the personnel program and job title, and whether the appointment is career, limited, contract, casual/restricted, academic or by-agreement.

Distributions are established to define how the employee is paid. For example, distributions record information about the pay rate the employee will receive, the account number the pay will be charged to, and what type of pay it is, e.g. regular pay, shift differential, or a stipend, etc.

The following appointment/distribution codes are essential to the proper classification of the employee, as well as ensuring that time and attendance data is accurately reported to the compute process. It is the coding of the F/V (fixed/variable) code, Rate code, Pay Schedule, and Time code on the appointment line that determines if the employee's time is to be prelisted on the timesheets (UPAY644E), which pay cycle the employee is to be paid on, and if the employee is to be set up as positive time reporting or exception time reporting.

Essential Codes

The primary consideration when setting up an appointment is whether it is fixed (F), or variable (V). The F/V code will determine the rest of the codes referenced in this chapter, so care must be taken that the appointment is properly categorized as fixed or variable.

Fixed/Variable

F = Appointment is fixed. Timesheet (UPAY644E) will pre-list time for the employee. Employees with fixed appointments are paid automatically as pre-listed on timesheet with no action taken by the Timekeeper (**note: time code must = T**)

or

F = Appointment is fixed. Roster will pre-list time for the employee. Employees with fixed appointments are paid automatically as pre-listed on Roster with no action taken by the Timekeeper (**note: time code must = R**)

V = Appointment is variable. Timesheet (UPAY644E) will not pre-list time for the employee. Employees with variable appointments are paid according to hours entered on the UPAY644E by the Timekeeper (**note: time code must = A**)

or

V = Appointment is variable. Roster will not pre-list time for the employee. Employees with variable appointments are paid according to hours entered on the Roster by the Timekeeper (**note: time code must = Z**)

or

V = Appointment is variable and employee is a student title paid via the CruzPay application. Employees with variable appointments are paid based upon approved timesheets in CruzPay (**note: time code must = C**)

Rate Code

A = (Annual) Employee has a monthly rate of pay (expressed as an annual rate of pay on the appointment line)

H = (Hourly) Employee has an hourly rate of pay

B = (By-Agreement) Employee's appointment is By-Agreement and paid a fixed dollar amount that is not associated with a percent time or number of hours worked

The Rate code also defines the format the system will use for the distribution pay rate field.

- If the Rate code is A or B, the distribution pay rate will be formatted as a monthly figure, with two significant digits after the decimal point. (XXXX.XX)
- If the Rate code is H, the distribution pay rate will be formatted as an hourly figure, with four significant digits after the decimal point. (XX.XXXX)

Pay Schedule

MO = Employee's appointment is fixed (F), has a monthly rate of pay and is to be paid on the Monthly Current payroll cycle

MA = Employee's appointment is variable (V), has an hourly rate of pay and is to be paid on the Monthly Arrears payroll cycle*

*see exceptions noted in **Application of Codes**

An individual employee must have only ONE pay schedule for all appointments

By-Agreement type codes may be set up on either the MO or the MA

Time Code

T = Exception time reporting. Used to generate pay for all appointments set up as Fixed (F) and reported on the UPAY644E

R = Exception time reporting. Used to generate pay for all appointments that are set up as Fixed (F) and paid by on-line Roster in OPTRS.

A = Positive time reporting. Used to generate pay for all appointments set up as Variable (V) and reported on the UPAY644E

Z = Positive time reporting. Used to generate pay for all appointments set up as Variable (V) and paid by on-line Rosters in OPTRS.

C = Positive time reporting. Used to generate pay for all appointments set up as Variable (V), and paid via CruzPay (currently limited to hourly undergrad student titles)

W = No pay expected. Used for all appointments set up without salary.

N = Positive time reporting, no pay expected. Used for all appointments where time is NOT reported on a time reporting worksheet. (ie: Resident Assistants, closed period hires)

Time reporting codes must be used in a consistent manner for the entire campus. The above are the only currently valid codes for the Santa Cruz campus.

Sub Code

0 = Academic Salary Roll

- must be **Fixed**, Rate Code **A** or **B**, Pay Schedule **MO** and Time Code **T** or **R** (depending on method of time reporting)

1 = Staff Salary Roll

- must be **Fixed**, Rate Code **A** or **B**, Pay Schedule **MO** and Time Code **T** or **R** (depending on method of time reporting)

2 = General Assistance

- **Fixed**, Rate Code **A** or **B**, Pay Schedule **MO** and Time Code **T** or **R** (depending on method of time reporting)

OR

- **Variable**, Rate Code **H** or **B**, Pay Schedule **MA** and Time code **A** or **Z** (depending on method of time reporting)*

OR

- **Variable**, Rate Code **H**, Pay Schedule **MA** and Time code **C**

*see exceptions noted in **Application of Codes**

NOTE: FTE is never coded on sub 2 appointments

Application of Codes:

Designates Appointment Level Code
Designates Distribution Level Code

Fixed appointments (regardless of sub code) must be set up as exception time reporting (Time Code T or R). Fixed appointments are monthly rated, or by-agreement. Fixed appointments must be set up on the Monthly Current (MO) schedule. Fixed appointments are always used for employees who are paid on a monthly basis automatically by the system without any time reported for them by their departments.

CLASSIFICATION OF PAY	FIXED/VARIABLE CODE	RATE CODE	PAY SCHEDULE	TIME CODE	RATE	SUB CODE
Rated pay E.g. REG, SDF, etc.	F	A	MO	T	XXXX.XX	0,1,2

PAYROLL

Rated pay E.g. REG, SDF, etc.	F	A	MO	R	XXXX.XX	0,1,2
Flat Rated E.g. BYA, UNX, SAS, STP, PRQ etc.	F	B	MO	T	XXXX.XX	0,1,2
Flat Rated E.g. BYA, UNX, SAS, STP, PRQ etc.	F	B	MO	R	XXXX.XX	0,1,2
Without Salary E.g. WOS, PDW	F	Leave blank	Leave blank	W	Leave blank	0,1,2

Variable appointments must be set up as positive time reporting (Time Code A, Z or C). Variable appointments are hourly rated or by-agreement, and must be sub 2. Variable appointments must be set up on the Monthly Arrears (MA) schedule. Variable appointments are always used for employees who are paid based on time that is reported each pay period by the department.

CLASSIFICATION OF PAY	FIXED/VARIABLE CODE	RATE CODE	PAY SCHEDULE	TIME CODE	RATE	SUB CODE
Rated pay E.g. REG, SDF, etc.	V	H	MA	A	XX.XXXX	2
Rated pay E.g. REG, SDF, etc.	V	H	MA	Z	XX.XXXX	2
CruzPay Students Rated pay E.g. REG	V	H	MA	C	XX.XXXX	2
Flat Rated E.g. BYA, UNX SAS, STP, PRQ etc.	V	B	MA	A	XX.XXXX	2
Flat Rated E.g. BYA, UNX SAS, STP, PRQ etc.	V	B	MA	Z	XX.XXXX	2
Without Salary E.g. WOS, PDW	V	Leave blank	Leave blank	W	Leave blank	2

Appointment Coding with Sub 1 and Sub 2 Combinations

The unit may have a funding need situation in which they need two distributions to allow for payment of anything over 50%. The unit has established that the true effort for this position will require 75% time on a **regular basis**. However, the unit may only have 50% of the appointment budgeted for FTE. In this scenario, the employee is set up with a fixed MO appointment for 75%, with two distributions, one distribution at 50%, with .50 FTE, and one distribution at 25% with no FTE. They are expected to work and be paid automatically each month at 75%. **This employee always gets paid 75% on their regular pay cycle.**

ONE FIXED APPOINTMENT with TWO DISTRIBUTIONS

```

localhost - TN3270/TN5250 Connection
Session Edit View Commands Script Help
PPEAPP0-E1595          SCT EDB Entry/Update          SHIR 06/08/10 08:15:49
Appointments/Distributions          Userid: SCPAYALT
ID: 710836054 Name: ALWAYS, AFUNDING NEED      Emp Stat:      Pri Pay:
PAF Gen No: _____ Page 1 of 1
Appt  Actions  Pgm Typ Bas Pd Ovr  Appt Begin  Appt End Dur Dept  FLSA
10    █         - 2  -  -  -  010110    999999  I  -  -
Title                               Grade %Full F/V Ann/Hr Rate  Rt Sch Time Lv
7254 ANALYST, BUDGET, ASST          H  0.75  F  -  -  -  A  MO  T  A

Dist  Actions  L Acct  CC  Fund PC  S          FTE  Dis %
11    7 660300 19900 1  ACCT/Extramural Funds 0.50 0.5000
Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP
010110    999999  -  -  3200.00    REG  -  -  -

Dist  Actions  L Acct  CC  Fund PC  S          FTE  Dis %
12    7 660300 19900 2  ACCT/Extramural Funds 0.2500
Pay Begin  Pay End  Step  O/A  Rate/Amount  DOS  PRQ  DUC  WSP
010110    063010  -  -  3200.00    REG  -  -  -

Next Func: _____ ID: _____ Name: _____ SSN: _____
U0001 Input accepted
====>
F: 1-Help      2-Cancel      4-Print      5-Update
F:              9-Jump        10-PrevFunc  11-NextFunc

Line 6 Column 9
    
```

***Exceptions:**

1. Unrelated Fixed and Variable Appointments
2. Academic Summer Salary

1. Unrelated Fixed and Variable Appointments:

Variable MO appointment

The fixed appointment always takes precedence over variable appointments. That is to say, if an employee has both a fixed and a variable appointment, the variable appointment must be converted to monthly rated and set up as a separate (positive) appointment.

*Concurrent fixed and variable appointments are the **only instance** when it is acceptable to have a variable appointment on the MO schedule.*

If the fixed appointment were to end prior to the variable appointment, the variable appointment must be converted back to hourly rated. In other words, **an employee record should never have a stand alone variable monthly rated appointment.**

This applies to all unrelated Fixed and Variable Appointment scenarios, regardless of the “method” of reporting (UPAY644E, Roster, or combination thereof) .

- **If a student title, which is normally reported via CruzPay, is involved please consult with your Staff HR Service Team for guidance.**

Designates Appointment Level Code
Designates Distribution Level Code

CLASSIFICATION OF PAY	FIXED/VARIABLE CODE	RATE CODE	PAY SCHEDULE	TIME CODE	RATE	SUB CODE
Primary Rated pay E.g. REG, SDF, etc.	F	A	MO	T or R	XXXX.XX	0,1,2

PAYROLL

Concurrent Variable Appointment Rated pay E.g. REG, SDF, etc.	V	A	MO	A,or Z	XXXX.XX	2
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Employee has two distinct and unrelated appointments. One is a fixed appointment and one is variable. The fixed appointment always takes precedence over the variable.

In this example, appointment 10 is a fixed, career position, reported on the UPAY644E, so is set up on the MO cycle as exception time reporting (A MO T).

Appointment 20 is a variable appointment, reported on the UPAY644E. If this was the only appointment that this employee had, it would be set up on the MA cycle as a variable, hourly rate (H MA A). But because the fixed appointment always takes precedence, this variable appointment must be set up on the MO, per the exception rule above (A MO A). *If appointment 10 were to end, appointment 20 would need to be converted back to an hourly appointment on the Monthly Arrears (H MA A).*

```

localhost - TN3270/TN5250 Connection
SCT EDB Entry/Update SHIR 06/29/10 07:24:26
Appointments/Distributions Userid: SCPAYALT
ID: 707772314 Name: SEPARATE, AND DISTINCT Emp Stat: Pri Pay:
PAF Gen No: Page 1 of 1
Appt Actions Pgm Typ Bas Pd Ovr Appt Begin Appt End Dur Dept FLSA
10 2 010110 999999 I
Title Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv
7254 ANALYST, BUDGET, ASST H 0.50 F 3200.00 A MO T A
Dist Actions L Acct CC Fund PC S FTE Dis %
11 7 660300 19900 1 ACCT/Extramural Funds 0.50 0.5000
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
010110 999999 3200.00 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: 9-Jump 10-PrevFunc 11-NextFunc
Line 6 Column 9
                    
```

```

localhost - TN3270/TN5250 Connection
SCT EDB Entry/Update SHIR 06/29/10 07:30:36
Appointments/Distributions Userid: SCPAYALT
ID: 707772314 Name: SEPARATE, AND DISTINCT Emp Stat: Pri Pay:
PAF Gen No: Page 2 of 2
Appt Actions Pgm Typ Bas Pd Ovr Appt Begin Appt End Dur Dept FLSA
20 3 060110 063011
Title Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv
7646 ADMIN. SPECIALIST H 0.25 Y 3000.00 A MO A A
Dist Actions L Acct CC Fund PC S FTE Dis %
21 7 660200 19900 2 VC/ BAS Operating 0.2500
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
060110 063011 3000.00 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 10-PrevFunc 11-NextFunc
Line 6 Column 9
                    
```

2. Academic Summer Salary

Specific academic Summer Salary DOS codes may be set up on the academic employee’s primary MO cycle, or may be set up “off cycle” on the MA. This is the **ONLY** situation in which an employee may have concurrent MO/MA appointments.

CLASSIFICATION OF PAY	FIXED/VARIABLE CODE	RATE CODE	PAY SCHEDULE	TIME CODE	RATE	SUB CODE
Rated pay ACR, ARC, ACA, SSG, ACM, AMN, OEN	F	A	MO	T or R	XXXX.XX	0,2
Flat Rated AAC, APA, SSC, SST, DIF	F	B	MO	T or R	XXXX.XX	0,2

SEE [SECTION 7.7 - SUMMER SALARY](#) FOR FURTHER INFORMATION

Please refer to the appropriate Staff or Academic policy, and/or your Staff or Academic HR analyst for further clarification or guidance in regards to the above scenarios.