

PAM

4.1 (Rev. 05/94)

MASS UPDATES

Mass updates to the Employment History result from actions which affect many or all records on the data base. The following types of transactions are processed by Personnel Operations automatically and do not usually require processing of PAR's by the Departments:

- MSA
- SIS
- GEN
- CLASS TITLE CHANGES

Departments must contact Personnel/Payroll Services Division, Program Management and Analysis Section Manager at 322-8071 or CALNET 8-492-8071 regarding proposed mass updates for reallocations or reorganizations.

A reallocation which does not affect all employees in "a given" class within an appointing power, must be documented by the Department on individual PAR's using Transaction A20.

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4.2 (Rev. 11/00)

SISA/MSA MASS UPDATE

The SISA/MSA Registers, Forms 609 - Supervisor Certification of Salary Adjustment, and Prior Pay Period Anniversary Date Reports are issued by Personnel Operations the first week of each month.

- I. A. The register is issued to appointing powers having employees who are due a SISA/MSA. It only reflects anniversary dates on the data base effective the following pay period.
- B. The register is issued in position number and SSA# order with a page break after each reporting unit. The employee's CBID is also identified on the register. See example of the form on page 4.6.
- C. The appointing power verifies that the register information is in agreement with any late actions submitted that affected SISA/MSA's to be effective in the following pay period.
- D. The "Comment" area is for comment codes added by the appointing power per chart on page 4.5.
 1. Employees listed, whose SISA/MSA are effective after movement to another appointing power, are not to be deleted unless there is an applicable comment code for the situation. (For a salary denial effective after a move, the gaining appointing power is responsible for appropriate documentation.)
 2. If an employee is listed on the register and should not receive a SISA/MSA, choose the applicable code that describes the situation for not granting employee the SISA/MSA and circle the register number for the employee.
- E. 1. For all employees identified on the register, a SISA/MSA will be posted unless a PAR transaction making employee ineligible is processed prior to the mass update.

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4.3 (Rev. 11/96)

SISA/MSA UPDATE (continued)

I. SISA/MSA Register (cont.)

2. If an employee is not listed on the register and is due a SISA/MSA for the following pay period, process a SIS/MSA PAR transaction no earlier than the effective pay period.
- F. After the mass update, for each employee not entitled to a SISA/MSA, process PAR's per chart on page 4.5. The PAR transactions should be processed by the semi-monthly/monthly Master Payroll cut-off dates. Otherwise, the Master Payroll warrant will be issued at the higher salary rate and will represent an overpayment.
- G. Appointing Power signature block must be completed.

II. Form 609 - Supervisor Certification of Salary Adjustment

- A. Preprinted Forms 609 (see page 4.7) are issued in position number and SSA# order for each employee listed on the SISA/MSA Register.
- B. Appointing power routes Forms 609 to supervisors for signature. After completion by the supervisor, the forms are kept on file by the appointing power.
- C. Blank Forms 609 are used for SIS or MSA Transactions when the preprinted Form 609 is not provided by Personnel Operations. A sample of this form (see page 4.8) is provided for your use to reproduce as needed; Form 609 is no longer stocked by General Services.

III. Prior Pay Period Anniversary Date Report

- A. This report is issued as a reminder to appointing powers:
 - a) having employees who were previously deleted from the SISA/MSA Register (not eligible for salary adjustment); OR

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4.4 (Rev. 11/96)

SISA/MSA MASS UPDATE (CONTINUED)

III. Prior Pay Period Anniversary Date Report (Cont.)

- b) who previously reported action indicating employee was due a salary adjustment for a prior pay period AND (for either a or b) no PAR has been received to complete the action.
- B. An original and one copy are issued in position number and SSA# order with a page break after each reporting unit. The employee's CBID is also identified on the report. For an example of this form refer to page 4.9.
- C. Upon receipt, the appointing power reviews and processes PAR's to complete the actions required and destroys the report after all required actions have been processed.

IV. Completion of SISA/MSA Process

- A. For all employees granted a SISA/MSA, PAR's are generated with a SIS/MSA Transaction. Turnaround PAR's are issued to appointing powers during the first week of the SISA/MSA pay period.
- B. Turnaround PAR's received due to SISA/MSA update should be reviewed and pending copies of the SISA/MSA Registers destroyed.



4.5 (Rev. 11/96)

FOR EMPLOYEES NOT SUBJECT TO THE PFP RULES

COMMENT CODES - SISA/MSA REGISTER

CODE	SITUATION	ACTION
1	SISA/MSA denied due to unsatisfactory job performance.	Process a SISC/MSAC transaction reporting SISA/MSA denial.
2	SISA invalid; permanent* separation effective prior to effective date of SISA.	Process a PAR for separation and a SISV transaction.
3	MSA denied for lump sum only. (Separation effective prior to effective date of MSA.)	Process a PAR for separation and an MSAC transaction for lump sum denial.
4	Permanent* or temporary* separation is effective the pay period prior to the MSA <u>and</u> time to be paid is less than 11 days.	Process a PAR for separation and an MSAV/SISV transaction.
5	Anniversary Date is not valid due to an action causing a change in salary.	Process a PAR for salary change action and an MSAV transaction.
6	Anniversary Date is not valid due to a time base change to intermittent or indeterminate.	Process a PAR for time base change and an MSAV.
7	Anniversary Date is not valid due to a non-qualifying pay period.	Process a PAR for non-qualifying pay period and an MSAV transaction.
8	Anniversary Date is not valid; established in error.	Process a PAR to correct anniversary date and an MSAV transaction.

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FOR EMPLOYEES NOT SUBJECT TO THE PFP RULES

COMMENT CODES - SISA/MSA REGISTER (CONT.)

CODE	SITUATION	ACTION
9	MSA invalid due to separation with fault (S41).	Process a PAR for separation and an MSAV transaction.
10	Employee at first step <u>and</u> MSA (not SIS) is due in SISA class.	Process a SISV transaction and a PAR for MSA transaction. (This situation may occur for an employee whose SIS should be an MSA due to counting prior service.)
11	Employee at second step, but due SIS instead of MSA.	Process an MSAV transaction and a SIS transaction. (This situation may occur for an employee whose class had a step added below the first step.)
12	MSA denied. Employee has not met college unit requirement.	Process an MSAC transaction reporting MSA denial.

* As defined in SPB, Rule 446.

NOTE: Employees who transfer between agencies (no change in Anniversary Date) should not be deleted from the Register. It is up to the gaining agency to complete Form 609 (Supervisor's Certification of Salary Adjustment) and/or to process a PAR for a SIS/MSA denial if one of the situations above occurs.

PROGRAM PSD300
PRINTED (Date)

STATE OF CALIFORNIA - STATE CONTROLLER'S OFFICE/PERSONNEL SERVICES
REGISTER OF SISA/MSA'S TO BE EFFECTIVE (Month) (Year)

PAGE: 1
ROUTE TO: (Dept.)

REGISTER NUMBER	SOCIAL SECURITY NO	EMPLOYEE NAME	CBID	AGCY UNIT CLASS	SER	CURRENT BASED ON SALARY	COMMENTS
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APPOINTING POWER SIGNATURE

4.6 (Rev. 11/96)

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STATE OF CALIFORNIA

SUPERVISOR CERTIFICATION OF SALARY ADJUSTMENT

STD. 609 (8/77)

SOCIAL SECURITY NO.	EMPLOYEE NAME	CBID	AGENCY	UNIT	CLASS	SERIAL	ANNIVERSARY DATE

RECOMMENDED ACTION

In my judgement, the employee's job performance:

meets the level of quality and quantity expected by the agency at this stage of an employee's experience in the position. Therefore, I recommend that the employee be granted a merit salary adjustment.

does not meet the level of quality and quantity expected by the agency at this stage of an employee's experience in the position. Therefore, I recommend that the employee not be granted a merit salary adjustment at this time. I have also informed the employee on this date _____. See attached statement.

SIGNATURE OF SUPERVISOR	TITLE	DATE
▶		

4.8 (Rev. 11/96)

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4.10 (Rev. 11/91)

MONTHLY EXPIRATION DATE REPORTS

INITIATED BY PPSD

I. DESCRIPTION OF THE REPORTS

A. PPSD issues the following monthly reports:

1. Appointment/Separation Expiration Report
2. Salary Rate Expiration Report

B. These reports are issued one month in advance of the expiration date.

C. They are issued only to Departments who have employees with impending expiration dates.

D. An original and one copy are issued with a page break after each reporting unit.

E. Examples of these reports are on page 4.11 and 4.12.

F. The issue date of all reports represents the date the report is printed.

G. The entry printed for each employee represents the most recent information on record at Personnel Operations.

H. The transaction code and effective date printed on the appointment/separation report (example 4.11) represents the most recent transaction on the data base at the time the report was issued.

I. The transaction code on the appointment/separation report may sometimes be an R01. (This would occur if the most recent transaction on the data base was a retirement system transaction.)

II. PURPOSE

A. The purpose of the reports is to alert Departments of the necessity to submit a transaction on the PAR for employees listed.

B. Departments not submitting appropriate documentation will receive another report the following month. (The report will continue to print when the expiration date is past and if no documentation has been received by Personnel Operations.)

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4.13 (NEW 11/91)

MONTHLY CB ID AUDIT REPORT

I. DESCRIPTION OF THE REPORT

- A. PPSD issues a Monthly CB ID Audit Report to each department that has employees with incorrect CB IDs.
- B. The issue date of each report represents the date the report is printed.
- C. The entry printed for each employee is the most recent information on record at PPSD.
- D. The report reflects the employee's Class Code, Class Title, Department, Name, SSN, Position Number, the Civil Service Payscale CB ID for the employee's class and the employee's Employment History CB ID.
- E. A sample of this report is on page 4.14.

II. PURPOSE

- A. The purpose of the Monthly CB ID Audit Report is to alert departments to submit a PAR transaction for employees whose CB IDs are incorrect.
- B. Each entry on the report should be examined, the employee's appropriate CB ID determined, and a PAR submitted to correct the CB ID.
- C. Departments not submitting appropriate documentation will receive subsequent reports the following month, and each month thereafter until the employees' CB IDs are corrected.
- D. Any questions or discrepancies should be directed to Personnel Operations Liaison Unit.

