Welcome to PAR DOCUMENTATION BASICS MODULE 2

Personnel & Payroll Services Division Statewide Training Unit Instructor: Kelli Shropshire

INTRODUCTION TO PAR DOC BASICS

PAM

3

This Training module is designed to give Personnel Specialist(s) a better understanding of PAM (Personnel Action Manual) Section 3 Miscellaneous Change Transactions and Separation Transactions.

Thru the use of this training module and PAM Section 3, Specialist(s) should be able to determine the appropriate transaction code for Miscellaneous Changes and Separations to ensure they are using the correct required/conditional chart for their transaction.

PAR MISCELLANEOUS CHANGE TRANSACTIONS Please turn to PAM page 3.100

Do not document any miscellaneous change transaction with an effective date the same as an existing transaction in Line 12, which allows this information to be changed. Instead document a correction to the existing transaction in Line 12 (see PAM page 9.4).

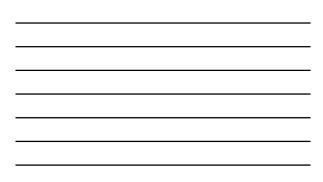
EXCEPTION: a separate 335 transaction may be <u>required</u> with an effective date the same as an existing transaction in Line 12.



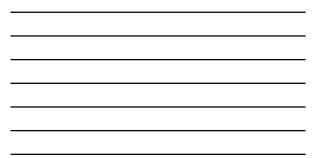
MISCELLANEOUS CHANGE TRANSACTIONS PAM pg, 3.100 REQUIRED/CONDITIONAL CHARTS			
TRANSACTION CODE	DESCRIPTION	PAM PAGE	
105	SOCIAL SECURITY NUMBER (correction or change)	3.104	
120	POSITION NUMBER (change)	3.105	
126	COLLECTIVE BARGAINING IDENTIFIER	3.106	
130	COUNTY CODE (change)	3.107	
215	EMPLOYMENT HISTORY REMARKS (allows 16 characters)	3.108	
315	PAY FREQUENCY (change)	3.109	
325	PLUS SALARY EXPIRATION DATE	3.110	
330	ANNIVERSARY DATE (change)	3.111	
335	ALTERNATE RANGE AND BASED ON SALARY (change)	3.112	
340	OFF PAYROLL (10/12 rule 369) (teachers only)	3.114	

TRANSACTION CODE	DESCRIPTION	PAM PAGE
341	ON PAYROLL (10/12 rule 369) (teachers only)	3.115
345	SHIFT DIFFERENTIAL	3.116
350	SPECIAL PAY	3.117
355	WORKWEEK	3.118
405	TIMEBASE (change)	3.120
430	PROBATION PERIOD (used to extend probationary period or to report completion of probation period for intermittent or fractional time base employees)	3.122
440	SEX (correction or change)	3.123
445	ETHNIC ORIGIN (change)	3.124
455	DISABILITY CODE (change)	3.125

TRANSACTION CODE	DESCRIPTION	PAM PAGE
505	RETIREMENT SYSTEM INFORMATION (change)	3.126
545	OATH (change)	3.128
550	MEDICAL CLEARANCE (change)	3.129
555	FINGERPRINTS (change)	3.130
560	PROFESSIONAL LICENSE (change)	3.131
565	JOB INCURRED INJURY (places employee on and off IDL)	3.132
705	TOTAL STATE SERVICE (change)	3.134
710	INTERMITTENT DAYS AND HOURS (used for layoff purposes)	3.135
715	SERVICE PAY PERIOD (correction or change)	3.136



TRANSACTION CODE	DESCRIPTION	PAM PAGE
GEN	GENERAL SALARY CHANGE (salary range change)	3.139
MHR	MULTIPLE HOURLY RATE/TRADE RATE CHANGE (casuals)	3.140
MSA	MERIT SALARY ADJUSTMENT (change)	3.142
ORP	OFFICIAL REPRIMAND (no longer in use)	3.144
PUN	ADVERSE SALARY DECREASE	3.146
R01	RETIREMENT SYSTEM TRANSACTION (keyed on the RST line)	3.147
SAL	OTHER SALARY CHANGES > Special adjustment for salary in equities > CPA/CPS increase > Restoration of salary following a PUN	3.148
SIS	SPECIAL IN GRADE SALARY ADJUSTMENT used for granting or denying a SISA.	3.150
SPC	SPECIAL CHANGE used for reporting NDI benefit status other than when employee is on NDI leave.	3.152





1. Effective the first of the pay period, at least 10% of Jennifer's time will be spent using her bilingual skill. This will mean more pay for Jennifer.

- 2. Brittney will start working on night shift effective May 01, 2015. Her nightshift duty will last for at least one full pay period.
- Kevin works 115 hours per month as a permanent intermittent employee. During the month of May, he exceeded 1,000 hours in the fiscal year. He will now become a retirement member.
- 4. Due to very bad behavior, Justin received a salary decrease for two months, effective June 01, 2015.
- Sharon's present bargaining status is R04 (Rank and File). However, next month, her collective bargaining status will change due to new duties making her a confidential employee.

- Jodi's work location is changing from Sacramento to Santa Barbara. She will retain the same position number.
- 7. Heath's hiring above minimum plus salary is expiring at the end of this pay period.
- 8. Sarah is changing her time base from full-time to half time to spend more time with her husband.
- 9. Jan's sex on her initial appointment was shown as male.
- 10. Jessica was on dock so many times during July that it resulted in a non-qualifying pay period.

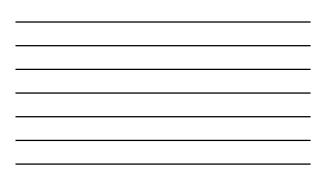


SEPARATION TRANSACTIONS REQUIRED/CONDITIONAL CHARTS			
TRANSACTION CODE	DESCRIPTION	PAM PAGE	
RESIGNATIONS			
S01	Voluntary from any appointment. Also includes voluntary resignation while on Leave of Absence and separation of permanent intermittent who did not report to work after being requested to report three times or was on non- pay statues for one-year.	3.204	
S02	* Layoff situation or in lieu of involuntary transfer	3.206	
S03	* In lieu of military leave	3.208	
S04	* Failure to meet conditions of employment.	3.210	
S05	for employee moving too, from or between exempt positions when lump sum vacation is to be paid. For current PERS member moving to an exempt position covered under a different retirement system. Sor employee being appointed by legislature (House or Legislative Committee) For employee accepting CSU exempt employment. Do not use for employees accepting employment with California Conservation Corps.	3.12	

TRANSACTION CODE	DESCRIPTION	
RESIGNATIONS		
S20	** Voluntary under unfavorable circumstances – pursuant to a stipulated agreement resulting from an appeal process. This code should be used only in those cases where the employee entered into a stipulated agreement (approved by the State Personnel Board) with the appointing power to voluntarily resign "with fault".	3.214
S21	** AWOL – Automatic resignation as a result of an absence without approved for 5 consecutive working days.	3.216
TERMINATION WITH	HOUT FAULT	
S30	Layoff Situation Reduction in force TAU, LT, R/A, or any temporary employee * For separation of Civil Service employee only. ** For actions occurring after 02/02/89.	3.218
S31	1 – No layoff situation Includes termination of TAU, LT, Emergency, Exempt and Retired Annuitant appointments, or for CEA who does not wish to exercise right of return.	3.220 3.221

TRANSACTION CODE	DESCRIPTION		
TERMINATION WITH	HOUT FAULT		
S32	Medical reasons	3.222	
S 33	* Displacement - When an employee is separated because another employee exercised his/her right of return, or for a CEA who doesn't wish to exercise right of return. * For Civil service employees only. *** Formerly "One document method" Appointment.	3.224	
TERMINATION WITH	H FAULT (No layoff situation)		
S40	Includes termination of TAU, LT, Emergency, CEA, Exempt and Retired Annuitant appointment.	3.226	
S41	Dismissal (Cannot be rehired without SPB approval)	3.228	
LEAVE OF ABSENCE			
S49	Non-Industrial Disability Insurance Leave	3.230	
S50	Regular or State Disability Insurance Leave	3.232	
S51	Military – Short term 0-6 months (use this transaction when paying makeup pay, even if leave is over 6 months)	3.234	

TRANSACTION CODE	DESCRIPTION			
LEAVE OF ABSENCE				
S52	Long term Military Leave (6 MONTHS – 4 YEARS)	3.236		
S53	Military Emergency (NO LIMITATION)	3.238		
S54	TEMPORARY – 30 days or less under DPA (CalHR) regulation 599.781 (only when effective immediately after S49 transaction.	3.240		
\$ 55	* Special – Technical Cooperation Program, Peace Corps, VISTA (Per G.C. 19991.2); Veterans Education (Per G.C. 19991.9); Civilian War Work, U.S. Merchant Marine, Full Time Duty with American Red Cross, Military Substitution Service (Per G.C. 19991.8)			
TEMPORARILY OFF PAYROLL				
S56	* Special – Job Injury or Illness <mark>(When no TD or IDL available)</mark>	2.244		
S 57	1 – Pending Investigation of Injury or Illness 2 – Involuntary Leave Pending Disability Retirement * For Separation of Civil Service employee only	2.246		
		16		



TRANSACTION CODE	DESCRIPTION	
RETIREMENT		
S70	Service or Compulsory	3.248
S71	Disability	3.250
OTHER		
S80	* Termination – Illegal appointment (Per G.C. 19257 or G.C. 19257.5 - Initiated by Personnel Operations only.) Permanent separation no right of return without SPB approval	
S85	* Adverse Suspension Temporary separation w/mandatory right of return (bob); return on A03	3.254
S 90	S90 * Rejection During Probationary Period (Permanent separation if no probation previously completed w/out break in service)	
S95	Death	3.258
S99	Cancellation of Appointment	3.260



 Larry, Greg, Chris, Julie, Christina and Riley worked for the state at various times. They all shared one thing in common which was being terminated with fault from TAU, LT, Emergency, CEA, Exempt and Retired Annulant appointments, respectively.

2. Alice resigned one week after her appointment.

- 3. Ava had run the whole gamut of TAU, LT, Emergency, CEA Exempt and Retired Annuitant appointments. She was always terminated without fault and no layoff situation.
- Angelina a permanent intermittent employee, was separated after being on non-pay status for a year.
- 5. Kylie did not accept the involuntary transfer. She resigned.

6

 Jack's medical condition prevented him from working and his regular leave of absence was expiring. He was not eligible for any other type of leave or retirement. His supervisor had to terminate his employment.

- 7. Chloe resigned while on a leave of absence to stay home and take care of her baby.
- The best Scott could do was to make lemonade out of lemons and head for nearest unemployment line when he was informed of the termination of his job due to a layoff situation.
- 9. Tracey didn't need the money anyway, so she took off for New York without notifying her supervisor.
- 10. Keith was unable to fulfill the conditions of his employment.

Conclusion of Module

In this training module we went over PAM Section 3 PAR Miscellaneous Change and Separation Transactions Required/Conditional Charts.

Questions regarding this training module contact: PPSDtraining@sco.ca.gov

Thank you for your participation!