

LOOK FORWARD REPORT INSTRUCTIONS
Report on Employees Approaching 1000 Hours Toward Career Status
February 2001

Purpose

The purpose of this report is to help identify those employees who hold limited appointments and who are approaching the 1,000-hour threshold for conversion to a career appointment(s). This report lists all employees who:

- hold at least one limited or casual appointment; and
- have accumulated a minimum number of hours¹, but less than 1,000 hours on pay status in one or more limited and/or casual appointments without a break in service of at least 120 days during the previous 12-month period.

The report is sorted by home department and within home department by employee name and will be produced on a monthly basis. A copy of the report is shown in Attachment A.

How to Interpret the Report

Beginning on January 1, 2001, the value of 3 for the data element Appointment Type will be assigned to both limited and casual appointments. (There will continue to be a need for casual appointments as some local Skilled Crafts units will be maintaining casual appointments.) This value along with the Title Unit Code data element (displayed as TUC on the report) will determine whether an appointment is a casual appointment or a limited appointment. An appointment will be approaching eligibility for conversion to a career appointment if Type = 3, Hours < 1,000, and TUC= 99 (or the TUC for bargaining units that have agreed to limited appointments).

The Hours column will display the total hours on pay status in all limited and casual appointments during the previous 12-month period. All current and future appointments for a given employee will be listed on the report to provide the reviewer a complete picture of the employee's present employment status.

¹ The minimum number of hours is set by each location.

The following examples illustrate how the report is to be interpreted.

Example 1:

Date of Report: 6/30/01

Emp ID	Name	Hours	Emp Status	Hire Date	Appointment Data							
					No	Type	Title	Begin	End	%	TUC	Dept.
888777902	Douglas, Fred.	999.00	Active	01/01/01	10	3	4717	01/01/01	99/99/99	25%	99	345608
					20	3	4717	03/01/01	99/99/99	40%	99	404918

The employee, Frederick Douglas, has two active appointments in two different departments. The TUC (Title Unit Code) and Type (Appointment Type) indicate that both appointments are uncovered limited appointments and potentially eligible for conversion to career appointments upon reaching an aggregate of 1,000 hours on pay status during a rolling 12-month period² without a significant break in service.

Example 2:

Date of Report: 10/30/02

Emp ID	Name	Hours	Emp Status	Hire Date	Appointment Data							
					No	Type	Title	Begin	End	%	TUC	Dept.
321987445	Lee, Robert E.	976.00	Inactive	03/01/02	10	3	5325	03/01/02	06/30/02	20%	99	345608
					10	3	3370	07/01/02	10/25/02	20%	99	345608

² During the start-up year, calendar year 2001, hours prior to 1/1/01 will not be included in the rolling 12-month period. Beginning on January 1, 2002, hours will be counted for a full rolling 12-month period.

The employee, Robert E. Lee, has two consecutive limited appointments (Type=3 and TUC=99) in the same department. The employee's status is inactive. The employee's status is inactive because he has no active appointments at the time the report is run. If the employee has left the University, the department should process the separation for this employee using normal procedures. He will not show up on this report the following month. If the department does not process a separation and the employee does not work in future months, he will drop off the report when his total hours fall below the threshold. If the department plans to extend his limited appointment or give him a new limited appointment, they should be aware that he is close to achieving the 1,000 hours that will make him eligible for career status.

Example 3:

Date of Report: 12/30/01

					Appointment Data							
Emp ID	Name	Hours	Emp Status	Hire Date	No	Type	Title	Begin	End	%	TUC	Dept.
321444334	Lincoln, A.	917.00	Active	02/15/01	10	3	4672	02/15/01	02/15/02	40%	SX	345608

The reports for most employees holding limited appointments are likely to be similar to the report for this employee in that the employee will have only one current appointment. This report shows that Mr. Lincoln has one active limited appointment and is close to the 1,000-hour threshold. Employees who hold limited appointments and who are on pay status for less than 50 percent time may appear on this report every month and never be eligible for conversion to career status. For example, this employee may normally work his normal 40 percent schedule which would be approximately 835 hours a year. He may have worked some extra hours in one month, which gave him 917 hours for the year. As long as he returns to his normal 40 percent schedule, he will not become eligible for conversion to career status. However, the above example could also indicate an employee who regularly works more than 40 percent time and, in this case, the employee may become eligible for conversion. Departments will need to plan ahead so that an employee's appointment does not inadvertently become eligible for conversion to a career appointment when there is not a continuing need for the employee's services.

Example 4:

Date of Report: 1/30/02

					Appointment Data							
Emp ID	Name	Hours	Emp Status	Hire Date	No	Type	Title	Begin	End	%	TUC	Dept.
332112123	Truth, Sojourner	950.00	Lv w/o	03/01/01	10	3	7472	03/01/01	99/99/99	45%	HX	345608

The employee, Sojourner Truth, has one potentially eligible appointment (Type=3 and TUC= HX). Ms. Sojourner is on a leave without pay. If her leave extends into the following month, she will have no eligible hours and her total hours will decrease. Ms. Truth will no longer appear on the report when her total hours during the past 12 months fall below the threshold. However, if she is scheduled to return from leave in the following month, the department should be aware that she is close to achieving eligibility for conversion to career status.

Report on Employees With 1000 Hours Toward Career Status

Purpose

The purpose of this report is to help identify those employees who hold limited appointments and who have reached the 1,000-hour threshold for conversion to a career appointment(s). This report lists all employees who have accumulated at least 1,000 hours on pay status in one or more limited and/or casual appointments during a rolling 12-month period without a break in service of at least 120 consecutive days. The report is sorted by home department and within home department by employee name and will be produced on a monthly basis. A copy of the report is shown in Attachment B.

How to Interpret the Report

An appointment will be eligible for conversion to a career appointment if Type = 3, Hours are greater than or equal to 1,000, and TUC = 99 (or the Title Unit Code for bargaining units where agreement has been reached). The Hours column will display the total hours on pay status in all limited and casual appointments during the previous 12-month period. All current and future appointments for a given employee will be listed on the report to provide the reviewer a complete picture of the employee's present employment status.

The following examples illustrate how the report is to be interpreted.

Example 1:

Date of Report: 9/30/01

					Appointment Data							
Emp ID	Name	Hours	Emp Status	Hire Date	No	Type	Title	Begin	End	%	TUC	Dept.
888777901	Adams, John	1020.00	Active	01/01/01	10	3	4717	01/01/01	99/99/99	25%	SX	345608
					20	3	4718	03/01/01	12/31/01	50%	SX	404918

The employee, John Adams, has 2 active limited appointments (Type=3 and TUC= SX) in different departments (Dept.=345608 and 404918), both of which are eligible (Hours=1020) for conversion to career appointments, effective 10/01/01.

Example 2:

Date of Report: 2/1/02

					Appointment Data							
Emp ID	Name	Hours	Emp Status	Hire Date	No	Type	Title	Begin	End	%	TUC	Dept.
321987444	Jefferson, Thos	1007.00	Inactive	03/01/01	10	3	5325	03/01/01	01/31/02	45%	99	345608

The employee, Thomas Jefferson, is inactive because he has no active appointments at the time the report is run. If he has left the University, the department should process the separation for this employee using normal procedures. He will not appear on this report the following month. If the department does not process a separation and the employee does not work in future months, he will drop off the report when his total hours fall below 1,000 hours. The department should be aware that Mr. Jefferson is eligible for career status and any new appointment may need to be set up as a career appointment if the department plans to continue his employment.

Example 3:

Date of Report: 12/31/01

					Appointment Data							
Emp ID	Name	Hours	Emp Status	Hire Date	No	Type	Title	Begin	End	%	TUC	Dept.
321444333	Ross, Betsy	1008.00	Active	02/01/01	10	3	3370	02/01/01	99/99/99	40%	99	345608

The employee, Betsy Ross, has one active limited appointment (Type=3 and TUC=99) that is eligible for conversion (Hours=1008) to a career appointment, effective 1/1/02. Note that this employee is appointed at 40 percent of full-time. Because an employee must be on pay status for approximately 48% of full-time over a 12-month period to attain 1,000 hours, Ms. Ross' current appointment percent of full-time does not accurately reflect the effort expended in her limited appointment. If the total hours is accurate and not a reporting error, the appointment percent time will require upward adjustment if it is expected that she will continue to be on pay status at the same rate in the career appointment as the reported effort in her limited appointment. In either case, the limited appointment should be ended with a 12/31/01 end date and a new career appointment established with the appropriate percent time and a 1/01/02 begin date.

Example 4:

Date of Report: 11/31/01

					Appointment Data							
Emp ID	Name	Hours	Emp Status	Hire Date	No	Type	Title	Begin	End	%	TUC	Dept.
332112121	Washington, M	1019.00	Lv w/pay	01/15/01	10	3	4672	01/15/01	99/99/99	44%	99	345608

The employee, Martha Washington, has one limited appointment (Type=3 and TUC=99) that is eligible for conversion to a career appointment (Hours=1019) even though the employee is on a leave with pay. (Note that the eligibility criteria is for 1,000 hours on pay status rather than 1,000 hours actively at work.) The limited appointment should be ended and a career appointment established, effective 12/01/01. As in example 3, the percent time should be adjusted if necessary.

ATTACHMENT A.

PPP1392/PPP139/012401
000001

UNIVERSITY OF CALIFORNIA-SYSTEMWIDE

PAGE NO.

RETN: SEE RPTS DISP SCHEDULE/DIST.
01/24/01

MONTHLY PERIODIC MAINTENANCE

RUN DATE

EMPLOYEES WITH 1000 HOURS TOWARD CAREER STATUS

DEPARTMENT: 804918 CHANCELLORS OFFICE

EMP ID	NAME	HOURS	EMP STATUS	HIRE DATE	APPOINTMENT DATA					%	TUC	DEPT
				NO	TYPE	TITLE	BEGIN	END				
777000004	AND CABBAGE, CORN BEEF	1200.00	Active	07/01/00	10	1	7274	07/01/00	05/31/01	80%	99	804918
					20	3	4673	03/01/01	99/99/99	50%	CX	804918
777000010	BOTHERS, EVERLY	1124.00	Active	08/01/00	20	3	4723	11/01/00	05/31/01	70%	CX	804918
777000009	COLLINS, JUDY	1086.00	Active	08/01/00	20	3	4723	11/01/00	05/31/01	80%	CX	804918
777000016	FAN, FORTY NINER	1281.60	Active	08/01/00	20	3	4724	11/01/00	06/30/01	80%	CX	804918
777000017	JACKSON, JERRY PHILIP	1227.60	Active	07/01/00	10	5	3370	07/01/00	05/31/01	70%	99	804918
					20	1	4612	01/01/01	07/31/01	10%	CX	804918
					30	3	4672	01/01/01	08/31/01	15%	CX	804918
777000020	MALCOM, BARRY CHRISTOPHER	1072.48	Active	07/01/00	10	3	4672	07/01/00	99/99/99	49%	CX	804918
777000012	SIMON, PAUL	1000.00	Active	08/01/00	20	3	4722	11/01/00	05/31/01	70%	CX	804918
777000022	WEATHER, WENDY	1132.32	Separated	07/01/00								
TOTAL EMPLOYEES FOR DEPARTMENT:		8										

ATTACHMENT B.

PPP1393/PPP139/012401
000001

UNIVERSITY OF CALIFORNIA--SYSTEMWIDE

PAGE NO.

RETN: SEE RPTS DISP SCHEDULE/DIST.
01/24/01

MONTHLY PERIODIC MAINTENANCE

RUN DATE

EMPLOYEES APPROACHING 1000 HOURS TOWARD CAREER STATUS

DEPARTMENT: 804918 CHANCELLORS OFFICE

EMP ID	NAME	HOURS	EMP STATUS	HIRE DATE	APPOINTMENT DATA			%	TUC	DEPT
				NO	TYPE	TITLE	BEGIN	END		
777000013	BEAM, MOON	999.00	Active	07/01/00	20	3	4722	11/01/00	05/31/01	100% CX 804918
777000014	GIANTS, MAD DOG	760.00	Active	08/01/00	20	3	4722	11/01/00	05/31/01	100% CX 804918
777000021	JOHNSON, PAUL CHRISTOPHER	832.32	Separated	07/01/00						
777000027	MACDONALD, RONALD	868.00	Active	07/01/00	10	3	4672	07/01/00	05/15/01	100% CX 804918
777000003	OAKER, MEADI	870.00	Active	07/01/00	10	6	7274	07/01/00	99/99/99	35% 99 804918
					20	3	7274	07/01/00	05/31/01	05% 99 804918
					30	1	7274	11/01/00	03/31/01	20% 99 804918
777000030	PAUL, PRINCE	920.00	Active	07/01/00	10	3	4672	07/01/00	05/15/01	100% CX 804918
777000002	PRANCER, NANCY PRANCY	800.00	Active	07/01/00	10	6	7274	07/01/00	99/99/99	40% 99 804918
					20	1	7274	07/01/00	99/99/99	20% 99 804918
					30	3	4671	02/15/01	99/99/99	40% CX 804918

TOTAL EMPLOYEES FOR DEPARTMENT: 7