

GLOSSARY

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A

ADDITIONAL HISTORY

Those transactions, which do not appear, summarized on the PAR in Line 12 - Employment History, because the space in Line 12 has already been filled. History earlier than the latest 15 entries is stored on the data base, on microfilm or on microfiche, and is available on request.

ADDITIONAL POSITION

A position in addition to an employee's primary employment. This additional position may be with the same or different appointing power and may be appointed to the same or different tenure and time base. Up to six (6) additional positions will print in Line 12 - Employment History, on the PAR.

AGENCY CODE

A three digit numeric code assigned to a department or agency which identifies that agency for personnel and payroll reasons.

ALLOWABLE ITEM

A PAR item containing one of the symbols from the legend on a Required/Conditional chart which may be completed.

APPOINTING POWER

A person or group (such as an agency or department) defined by statute which has the authority to make appointments to positions in the State civil service.

APPOINTMENT TYPE

A computer generated code which is stored and displayed on the PAR History Detail screen (B segment) to indicate a specific type of **appointment** or **separation** transaction.

Miscellaneous transactions do not have their own "appointment type" codes. (See codes/meanings below.)

The "appointment type" code is reflective of and generated each time an appointment or separation transaction is processed. It is carried forward and displayed in subsequent miscellaneous transactions until another appointment or separation transaction is processed and the system generates an "appointment type" which is indicative of that transaction. When a new appointment or separation transaction is keyed to the system, the above process is repeated. This code (appointment type) is useful in determining if out-of-sequence PAR transaction packages were keyed in the correct sequence to allow the information to be carried forward properly.

CODES

A
B
C

MEANING

Appointment from list
Reinstatement
Promotion

GLOSSARY

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D	Demotion
E	Emergency
F	Transfer
G	SPB or Court Action
H	Exempt
I	Retired Employee
J	Training and Development
K	TAU
L	Leave of Absence Without Pay
M	Military Leave Without Pay
N	Non-Industrial Disability Leave
P	Permanent Separation Without Fault
Q	Disability Retirement
R	Service Retirement
S	Punitive Suspension
T	Lay-off
U	To Accept Exempt Appointment
W	Permanent Separation With Fault
X	Death

ASTERISK

This symbol (*) is entered on the PAR to delete information which has turned around in the shaded areas. An asterisk appears on the Turnaround PAR beside those items that changed as a result of the most recent transaction.

AUDIT

The manual examination and review of incoming PARs by the Audits Section and Production Support Section of Personnel Operations for compliance with legal and system requirements.

AUDITS SECTION

A section in Personnel Operations which reviews incoming PARs to determine whether or not the transaction complies with legal and Employment History System requirements.

B

BACKUP

Substantiating information which gives proof or evidence that certain conditions for certain transactions have been met. Substantiation is entered on the PAR in Line 10 - Remarks, or is attached to the PAR depending upon the condition. See Line 10 information, Section 2.200.

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BUFF MEMORANDUM

A memorandum is NO longer on buff colored paper. The memos are issued on white paper to all PAM holders as cover transmittals for PAM revisions to communicate special processing or clarifying information.

C

CALPERS

California Public Employee's Retirement System, the control agency responsible for the investment and regulation of retirement contributions and benefits. CalPERS also administers and operates the Health Benefits Program.

CIVIL SERVICE

A system of employment used in State service by which appointments are usually determined through competitive examinations.

CLASS TYPE

Identifies whether a particular class and corresponding salary schedule are Exempt or Civil Service in the Pay Scales Table. This item is system generated and is stored on the PAR History Detail screen.

COMPOSITE RECORD

An employee's employment history record at the time of the individual's conversion to the Employment History Data Base.

COMPUTER GENERATED

Information produced by the computer from the data base without direct input or request from the users.

CONDITIONAL

This symbol "O" in a PAR item on a Required/ Conditional chart denotes items which must be completed under certain conditions. These conditions are identified in the item definition.

CONVERSION

The process of transferring information from one form to another as when the employee files previously maintained at SPB, SCO and PERS were merged to establish one centralized file to be maintained by PPSD for the three control agencies. See User's Conversion Dates, Section 1.2 - 1.4.

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CONVERSION RECORD

That part of an employee's personnel record that was put on the Employment History Data Base at the time of the employee's department's conversion. The information was taken from the employee' files at SPB, SCO and PERS.

CONVERSION DATE

The date on which maintenance of employment history records were converted to the Employment History Data Base.

CORRECTIVE ACTION

A method to adjust an employee's Employment History record. The adjustment may be a current or out-of-sequence correction, void, or addition to a PAR item or transaction already processed in Line 12 - Employment History.
See Section 9.

CORRECTION

An adjustment to a transaction or PAR item(s). The adjustment may be a change, a deletion or an addition to a transaction already processed. See Section 9.

CRITIQUE SHEET

A green form (PSD 15) provided for use by any PAM User to submit a problem or suggestion for the PAR, EAR, NOPA, PAM or Personnel Operations.

CRT

A device equipped with a keyboard and display screen used at PPSD to update and request information about an employee's record. The CRT (Cathode Ray Tube) is also referred to as a terminal or video display unit (VDU).

CSU

California State University which, under the direction of the Chancellor's Office, uses a sub-system of the Employment History System maintained by PPSD, Personnel Operations.

CURRENT EMPLOYEE

A term used to determine which appointment Required/Conditional chart to use. A current (as opposed to new or returning) employee is one who is on the data base in an active status.

CURRENT STATUS RECORD

The first line of history in Line 12 on the PAR that always reflects the employee's current status record on the data base.

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D

DATA BASE

A collection of data organized for rapid search and retrieval by computer. In our case, it is the computerized central information file or memory bank of Employment History records for employees under the Uniform State Payroll System.

DATE OF CONVERTED RECORD

The date an agency or department changed its employee's personnel records from a previous system to the Employment History System. See Sections 1.4 - 1.7 for User's Conversion Dates and page 9.1 for an illustration of this date on the PAR.

DATE OF ENTITLEMENT

The Date of Entitlement is the date, on which the employee becomes entitled to a particular payment (i.e., date of hire, SPB/DPA action, date of settlement or lawsuit, etc.). A court decision is regarded as a Date of Entitlement and does not require SPB or DPA approval. (Exception: Adverse Action – 5.70-5.71) Departments are now delegated the authority to backdate transactions to their date of entitlement without prior review/approval by PSB. Departments must document the basis for each date of entitlement request, and retain the documentation for review. SCO can not legally adjust an employee's funds for transactions effective more than three years prior to the current (key) date with-out the PML 2007-026 or approval entered in Item 215 and X on file in line 10. (See PML 2007-026, Personnel Letter 06-017, Pam 2.203 and Pam item 215).

DELETE ONLY

A term to denote an item on the Required/Conditional chart that is allowable for deletion only.

DELETION

A method to cancel an incorrect item(s) on a transaction.

DOCUMENT REQUEST

When a PAR or NOPA has been lost or destroyed, a duplicate document may be requested from Personnel Operations by calling the Liaison Unit. Decentralized agencies can request a duplicate PAR for their employees from their site.

DPA

Department of Personnel Administration, the control agency which interprets and administers the statutes, rules and procedures pertaining to salaries and benefits for civil service, Finance exempt and Statutory employees.

GLOSSARY

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E

EAR

Employee Action Request (STD 686) form is used by employees to report employee information necessary for employment such as name, address and tax allowances to Personnel Payroll Operations Branch.

EH RESTORE

Employment History Restore. A process normally run each Wednesday to move records from the INACTIVE Employment History Data Base to the ACTIVE Employment History Data Base. (See Sections 10.25 and 10.25.1).

EMPLOYMENT HISTORY

Personnel records of employees paid under the Uniform State Payroll System maintained on a centralized computer data base by PPSD, Personnel Operations.

EXEMPT

Employees who are appointed or elected to state government positions without competing in competitive examinations.

EXEMPT AUTHORITY

Salary setting bodies and/or appointing powers of exempt positions. Exempt authorities are the Department of Personnel Administration, COPSE, Judicial Council, SPB (Maritime Academy and superintendents and wardens for the Department of Corrections), and by statute.

F

FINANCE

A control agency, the Department of Finance, is responsible for funding of state positions and salary setting.

H

HARD COPY

A printed copy of machine output in a visually readable form such as documents, summaries, reports or listings.

I

INTERFACE

The transfer of data or information between computer systems such as between the Employment History System (Personnel Operations) and the Uniform Payroll System (Payroll Operations).

L

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LEGEND

The explanatory list of these symbols =, O, ●, which are used on the Required/Conditional charts in the PAM. The legend appears in the bottom left-hand corner of each chart. See pages 3.0 - 3.1 for a detailed explanation of the legend and its use.

LIAISON UNIT

A unit in Personnel Operations whose primary function is to receive and respond to telephone inquiries from agencies concerning PAR and EAR documentation, interpretation of the PAM, or document request.

LINE 12, EMPLOYMENT HISTORY

The bottom portion of the Turnaround PAR that is a printed record of a summary of most transactions submitted to Personnel Operations. See page 9.1 for an illustration. For information on transactions that do not print in Line 12, see PAM Section 2.208.

LUMP SUM PAYMENT DEFERRAL

A PAR Item (877) to indicate that payment of Lump Sum time is to be deferred to the following tax year.

M

MASS UPDATES

Actions which affect many or all records to the data base such as GEN, MSA, SIS and may be processed by Personnel Operations automatically. See Section 4.

MICROFICHE

A sheet of microfilm containing rows of microimages of pages of personnel records on employees.

MICROFILM

A film bearing a photographic record on a reduced scale of printed or other graphic matter.

MOST RECENT TRANSACTION

That transaction which has the most recent effective date and is printed immediately below "Current Status" in Line 12 - Employment History, on the PAR.

N

NONALLOWABLE ITEM

A PAR item which does not contain any symbol from the legend on a Required/Conditional chart and cannot have information entered.

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NOPA

Notice of Personnel Action, a form printed in triplicate that is computer generated for certain transactions. The NOPA provides employees with an informational copy of certain transactions, which affect their status, and/or serves as a legal document for recording the employee's signature on appointments and some miscellaneous changes.

O

ONE OR MORE REQUIRED

This symbol O on an item on a Required/ Conditional chart means that at least one of the items marked with this symbol must be changing and completed for a valid transaction.

OUT-OF-SEQUENCE

A transaction effective prior to the most recent transaction posted on the employee's employment history record, or a transaction effective the same date as the most recent transaction that, when posted, will post prior to the most recent transaction.

P

PADDED PAR

Personnel Action Request (STD 680A), a form used by the appointing power to initially put an employee's record on the Employment History System Data Base, to document transaction packages or for additional positions new to the data base.

PAM

The Personnel Action Manual provides instructions on completion and processing the PAR, EAR, and NOPA. The PAM is maintained by the Customer Support Section within the Personnel/Payroll Services Division.

PAM REVISIONS

Updates and changes to the Personnel Action Manual (PAM) are issued on a regular schedule (4 times a year: February, May, August and November) and as needed to report changes in documentation and procedures.

PAR

Personnel Action Request (STD 680), a 17 x 11 inch form in a carbonless set of two copies (blue, yellow) used by departmental personnel offices and Personnel Operations to update employment history records and to furnish feedback from that update. The PAR replaces Forms 604, 605 and in some cases 606.

PAR ITEMS

Individual blocks on the PAR, which have a title and an assigned number. The first digit of each item number corresponds to the PAR line number of the item.

PAYROLL OPERATIONS

GLOSSARY

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A part of the Personnel/Payroll Services Division (PPSD) under the State Controller's Office, whose primary function is maintaining the Uniform State Payroll System and Disbursements.

PERSONNEL OPERATIONS

A part of Personnel/Payroll Services Division (PPSD) under the State Controller's Office, whose primary function is the operation and maintenance of the Employment History Data Base. Personnel Operations audits civil service and exempt transactions.

PERSONNEL TRANSACTIONS

Also called personnel actions, they are the recording or official documentation of appointments, miscellaneous changes and separations of State employees under the Uniform State Payroll System.

PPSD

Personnel/Payroll Services Division is a division of the State Controller's Office that provides personnel and payroll related services to departmental personnel offices and control agencies.

PRIOR TRANSACTION

A transaction that posts below another in Line 12 - Employment History.

PRODUCTION SUPPORT

A section in Personnel Operations whose primary function is to control incoming and outgoing documents and to manually audit EAR's.

R

RECONSTRUCTING EMPLOYMENT HISTORY

The process used to determine the effect of an out-of-sequence transaction on all subsequent transactions.

REQUIRED

This symbol = on a PAR item on the Required/Conditional charts denotes items which must be completed on the PAR in order for a transaction to be valid.

REQUIRED/ CONDITIONAL CHARTS

A group of charts organized by transaction codes. These charts indicate when PAR items must or may be completed for that transaction to be valid (see PAM, Sections 3 and 6).

RETIREMENT

Usually refers to retirement eligibility in CalPERS, Judges, STRS or the Legislator's retirement system.

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RETURNING EMPLOYEE

A term used on Required/Conditional charts. It is a guide when choosing the proper chart to document an appointment for an employee who is returning to State service after a break in service as opposed to an employee who is new to State service or are currently serving in State service.

S

SCO

State Controller's Office, the control agency responsible for civil service and exempt employee employment history, payrolls, and payment of State claims.

SEPARATION FORM

Separation/Disposition of PERS Contributions (STD 687) form is used when an employee is separating from State service to record information such as resignation reason, address and disposition of retirement benefits.

SHADED AREA

That portion of the PAR which reflects the most current information for an item(s) and is not normally completed by departmental personnel offices.

SPB

State Personnel Board, the control agency for civil service, SPB and Maritime Academy exempt employees which implements, administers and interprets laws and rules approved by the legislature which relate to the operation of the merit system.

SUBSEQUENT TRANSACTION

Any transaction which is or will be printed above a transaction in Line 12 - Employment History.

T

TAD

Turnaround Document - PARs generated as a result of certain transactions which are submitted to Personnel Operations and keyed into the Employment History Data Base. In most cases the turnaround document contains the computer printout of the changes or new information in the shaded area of the document.

TRANSACTION PACKAGES

The submission of a package containing more than one PAR for an individual employee when the transactions meet the criteria shown on Section 5.100.

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TURNAROUND CONCEPT

The updating of one form to provide input and feedback into a computer as opposed to the completion of a new form each time a transaction occurs.

TURNAROUND PAR

PAR issued after the initial appointment or conversion to the Employment History data base and after each subsequent transaction submitted to Personnel Operations.

TURNAROUND TIME

The time elapsed between receipt of documents at Personnel Operations and mailing of turnaround documents (TADs) to the department.

V

VIDEO ON-LINE

A unit of Personnel Operations, formerly called Terminal Operations, whose function is to key data from submitted documents to directly update the records on the data base.

VOID

A cancellation of an invalid transaction. See Section 9.5.